CHAPTER 2: SETUP PROCEDURES

This chapter provides you with the steps to set up Microsoft® Business Solutions – Navision® Relationship Management. This chapter contains the following sections:

- The Relationship Management Setup window
- Automatically recorded interactions
- Synchronization with customers, vendors, and bank accounts
- Duplicate search
- E-mail logging

The Relationship Management Setup Window

In the Relationship Management Setup window, you can decide how you want the program to manage certain aspects of your contacts, for example, default values and number series.

To open the Relationship Management Setup window, click SALES & MARKETING→SETUP→MARKETING SETUP.

The Relationship Management Setup window contains eight tabs:

- General
- Inheritance
- Defaults
- Interactions
- Synchronization
- Numbering
- Duplicates
- E-mail Logging

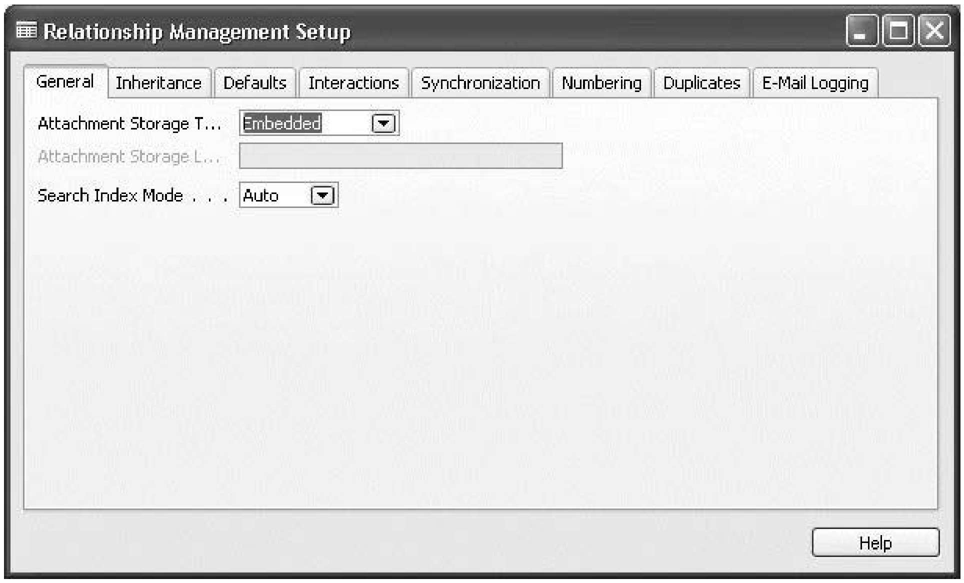
General Tab

Attachment Storage

You can store within Microsoft Navision all the documents that you send to your contacts, as well as the documents that you receive from your contacts. For example, you can store letters, price lists, product information, and so on. You can assign these documents as attachments to interaction templates, which you can use to create interactions, such as, sending a letter to a contact (see “Interactions and Document Management”).

You can attach all types of documents to interaction templates and interactions, for example, – Microsoft® Word documents, Microsoft® Excel files, Microsoft® PowerPoint presentations, text files, and so on. Before you can start working with attachments, you must specify the place where they will be stored. You do this in the Relationship Management Setup window, on the **General** tab.

In the **Attachment Storage Type** field, you can decide where you want the program to store the attachments: within Microsoft Navision (option Embedded), or on a disk file. In order to facilitate the access to attachments, it is recommended that you store the attachments within Microsoft Navision. However, if you decide to store them on a disk file, ensure that all users of the Sales & Marketing application area have access to it.



If you have selected Disk File as your attachment storage type, in the **Attachment Storage Location** field, you can specify in the **Attachment Storage Location** field, the drive and path to the location where the attachments are stored.

Search Index Mode

The contact search index can be set manually or automatically. In the **Search Index Mode** field, select the option you need - Auto or Manual.

If you select Auto, each time you add or modify any information, (for example, if you change the description of an interaction or a contact address), the program will automatically process this information for future search operations.
If you select Manual, you will need to run the Generate Search Index batch job for the program to process the new or changed information for future search operations.

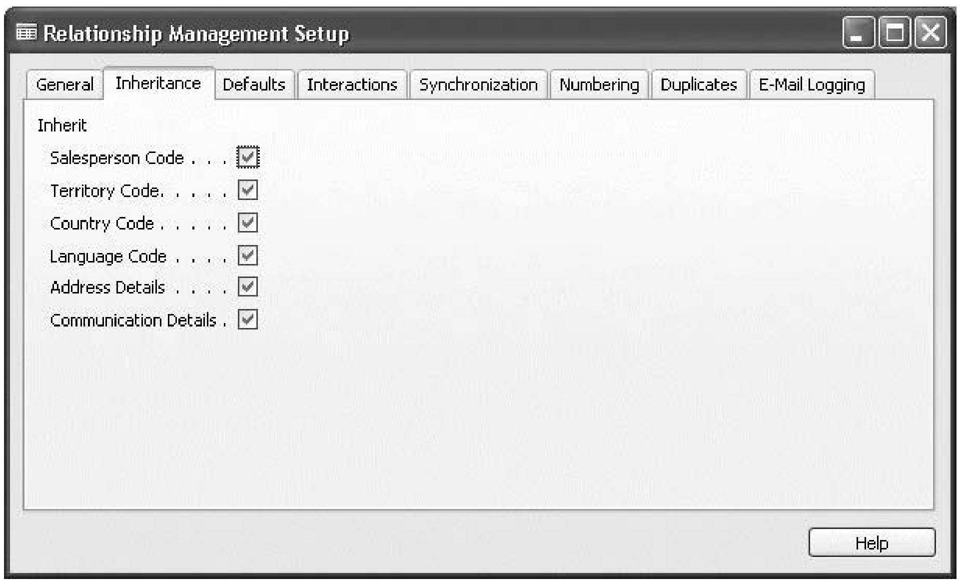
Inheritance

Some information about contact companies is identical to information about contact persons working within these companies, for example, the address details (for example, **Address**, **Address 2**, and **Post Code** fields). The program can automatically copy these fields from the contact company card to the contact person card each time you create a contact person for a recorded contact company. This prevents you from entering the same information both on the contact company card and on the contact person card.

You can have the program copy the following information:

- The salesperson code
- The territory code
- The country code
- The language code
- Address details, such as the **Address**, **Address 2**, **City**, **Post Code**, and **Country**
- Communication details, that is, such as the fax number, telex answer back, and phone number

You can specify this in the Relationship Management Setup window, on the **Inheritance** tab.

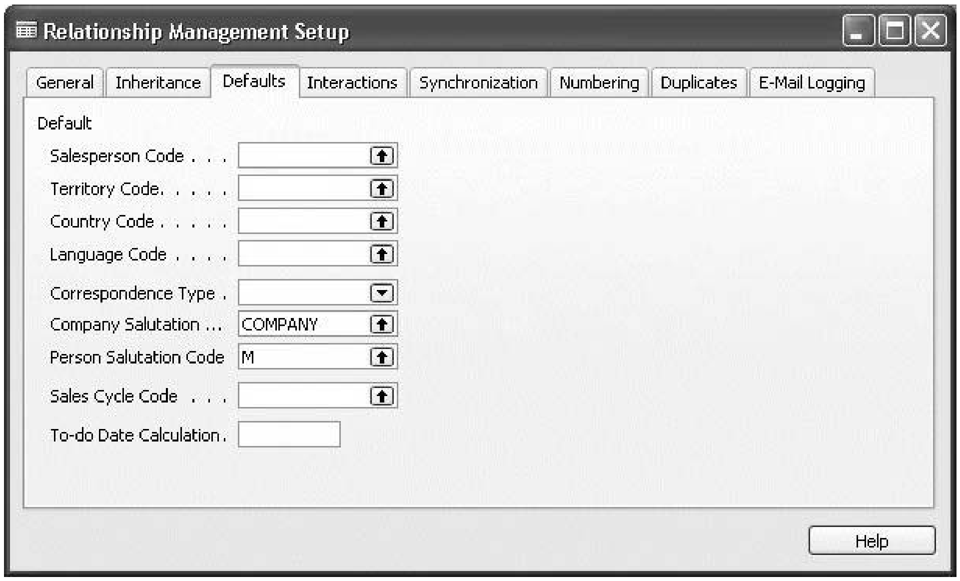


For example, if you want the program to automatically copy the salesperson code from the contact company card to the contact cards of the persons working within this company, select the **Inherit Salesperson Code** check box.

When you modify one or more of these fields on the contact company card, the program will automatically modify the field(s) on the contact person card (unless you have manually modified the field on the contact person card).

Defaults

You can have the program automatically assign a specific language code, territory code, salesperson code, country code, and sales cycle code as defaults to each new contact you create. To do this, you must enter the codes you want to use as default values in the Relationship Management Setup window, on the **Defaults** tab.



For example, if you want the program to automatically assign the country code GB to each new contact you create, enter GB in the **Default Country Code** field.

NOTE: *The inheritance of fields overrides the default values you have set up. For example, if you have set up English as a default language, but the contact company's language has been modified to German, the program will automatically assign German as the language code for the contact persons you create for that company.*

Default Salutation Codes

You can set up a default salutation code to be used automatically by the program for your company contacts and your person contacts. To enter a default company or person salutation code, in the Relationship Management Setup window, on the **Defaults** tab, click the **AssistButton** in the **Company Salutation Code** field or **Person Salutation Code** field. Select a code from the Salutations window that appears, or enter a new code and click **OK** (see "Multilanguage Salutation and Attachment").

Default Sales Cycle Code

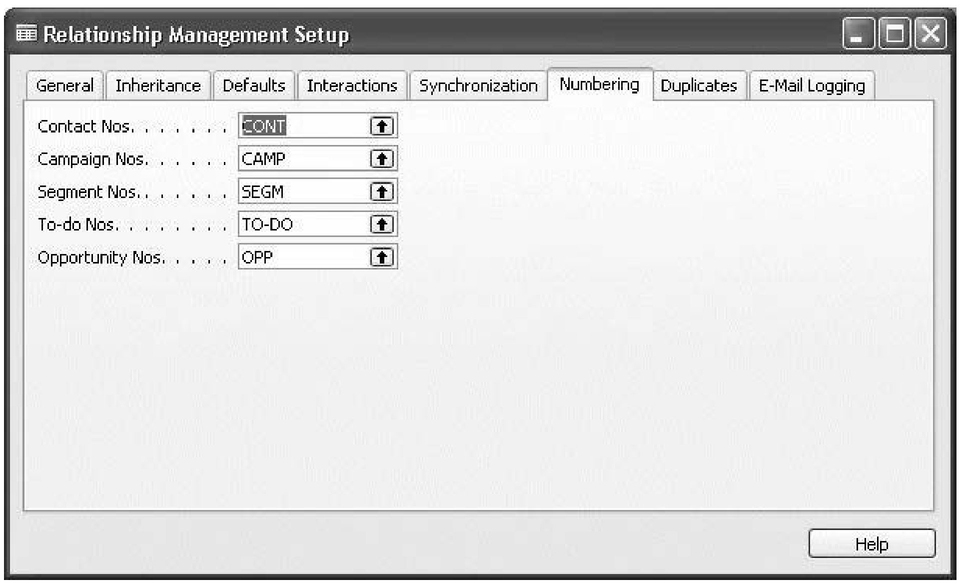
You can record in the program all the sales opportunities you have with your contacts (see “Opportunity Management”). You can set up a default sales cycle code that the program will automatically assign to each new opportunity you create. You do this on the **Defaults** tab by entering a sales cycle code in the **Default Sales Cycle Code** field.

Default To-do Date Calculation

This field is used during synchronization with Outlook. If you haven't have not entered any due date in the Outlook task, Microsoft Navision will use the current date. If you would like the program to calculate a due date for this kind of tasks, then in this field enter the to-do date calculation formula that you want the program to use to calculate the ending date for to-dos.

Numbering

You can set up number series for contacts, campaigns, to-dos, segments, and opportunities in the Relationship Management Setup window, on the **Numbering** tab.



For example, if you have set up a number series for contacts, then when you press ENTER in the **No.** field on the contact card, the program automatically enters the next available contact number.

Automatically Recorded Interactions

The Sales & Marketing application area enables you to record all the interactions you have with your contacts, such as, meetings, phone calls, e-mail messages, correspondence, sales orders, invoices, and so on. The program stores recorded interactions in the Interaction Log Entry table. The Interaction Log Entry table contains the interactions you have created manually using the Create Interaction wizard (or from the Segment window) and also the interactions that the program records automatically.

Sales, Purchase, and Service Documents

The program can automatically record sales, purchase, and service documents that you create and print for your customers and vendors.

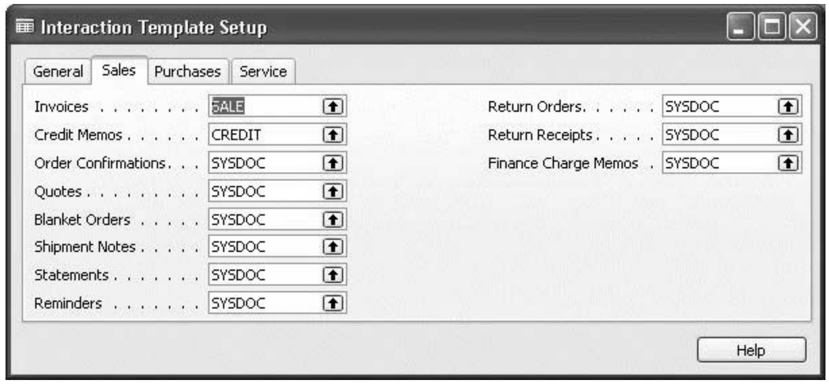
You can have the program automatically record an interaction when you do the following things in the program:

- Print sales and purchase quotes
- Print sales and purchase orders
- Print sales and purchase invoices
- Print sales and purchase blanket orders
- Print sales reminders and statements
- Print sales and purchase credit memos
- Print sales shipment notes
- Print purchase receipts
- Create sales service orders
- Post sales service orders
- Print sales return orders and return receipts
- Print sales finance charge memos
- Print purchase return shipments and return order confirmations
- Print service contracts, contract quotes, and quotes

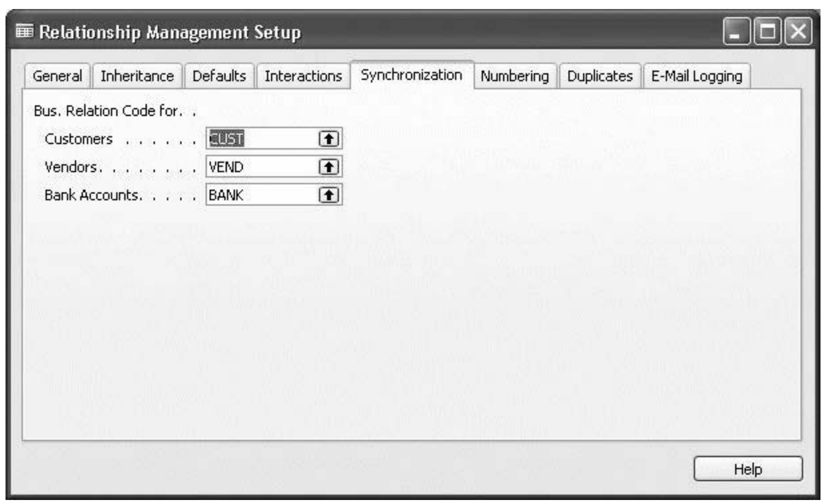
For the program to automatically record these types of interactions, you must do the following:

1. Specify interaction template codes for sales, purchase, and service documents.

   You do this by clicking SALES & MARKETING→SETUP→ INTERACTION→TEMPLATE SETUP and by then specifying interaction templates for the documents in the Interaction Template Setup window, on the **Sales**, **Purchases**, and **Service** tabs.



2. Set up the synchronization with customers and vendors. You do this in the Relationship Management Setup window, on the **Synchronization** tab.



3. Make sure that the customer or bank account is also recorded as a contact in the Sales & Marketing application area.

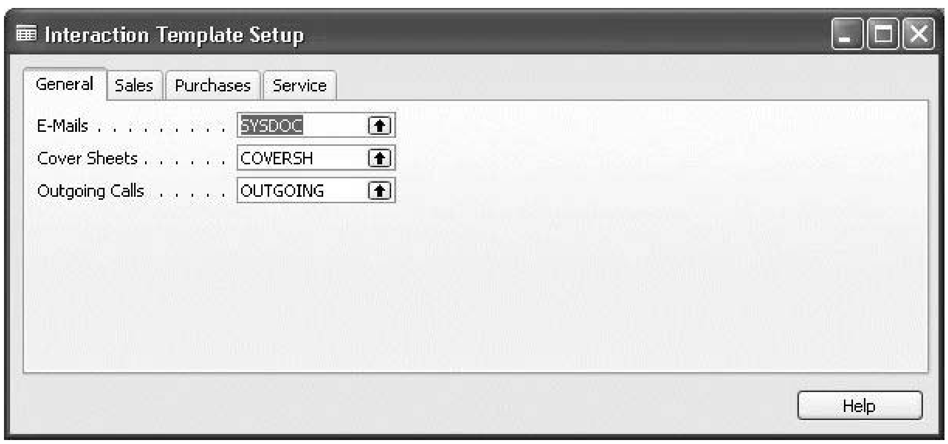
   For example, if you want the program to automatically record the sales quotes you print for your customers as interactions, you must enter an interaction template code in the **Sales Quotes** field, on the **Interactions** tab.

E-Mail Messages, Phone Calls, and Cover Sheets

You can have the program automatically record an interaction when you:

- Print cover sheets for your contacts from the contact card and the Segment window.
- Send e-mail messages to your contacts from the contact card, the customer card, the vendor card, and the bank account card by clicking the icon to the right of the E-Mail field and using the Create E-Mail wizard.
- Call your contacts from the contact card, the customer card, the vendor card, and the bank account card by clicking the icon to the right of the **Phone No.** field and using the Make Phone Call wizard. (You must have a TAPI compliant telephone and the right installation.)

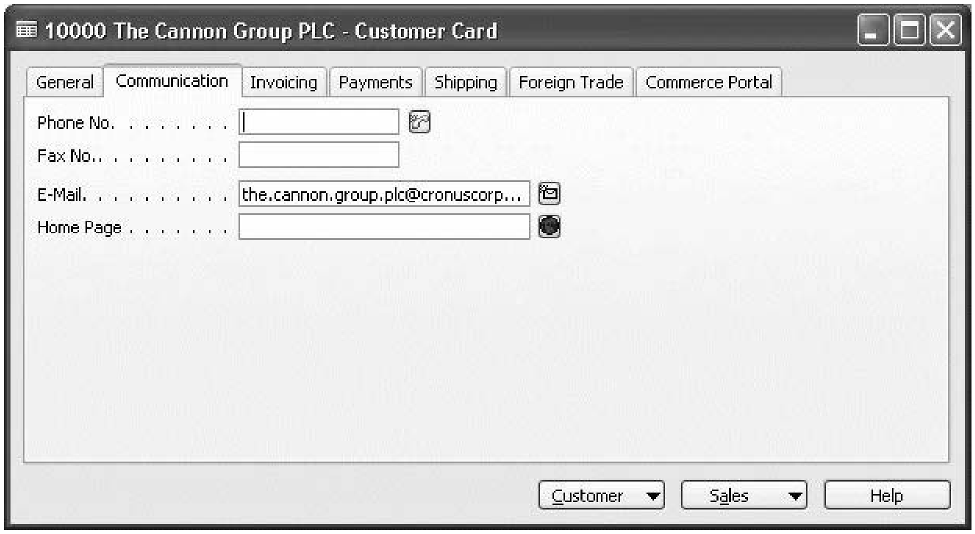
For the program to do this, you must specify interaction template codes for e-mail messages, cover sheets, and outgoing phone calls in the Interaction Template Setup window, on the **General** tab.



For example, if you want the program to automatically record the e-mail messages you send to your contacts as interactions, you must enter an interaction template code in the **E-Mails** field, on the **General** tab.

Recording Interactions from the Customer Card, the Vendor Card, and the Bank Account Card

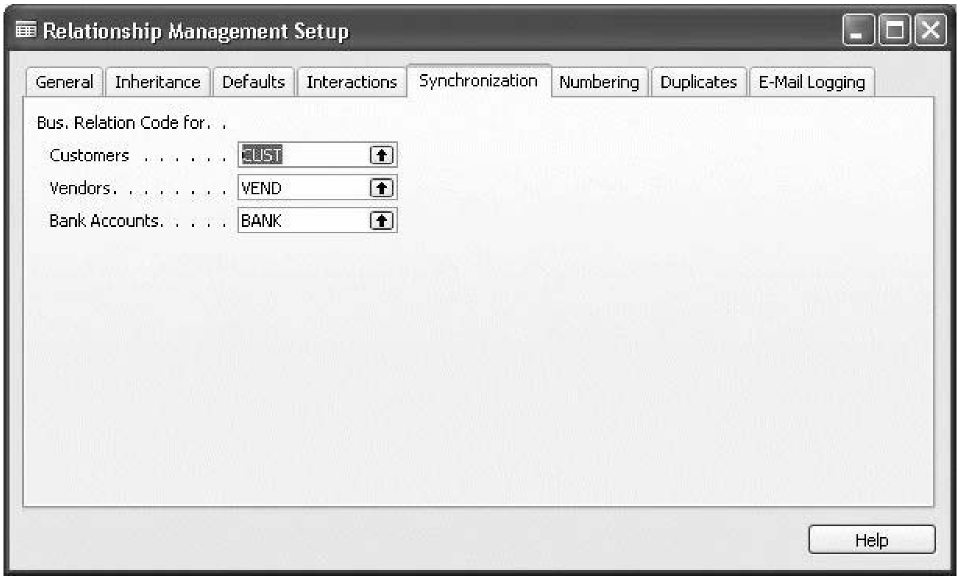
On the **Communication** tab of each customer card, the vendor card, and bank account card, you should find an icon with a telephone to the right of the **Phone No.** field. You can only use this button to record telephone calls as interactions if the customer, vendor, or bank account is also recorded as a contact in the Sales & Marketing application area.



Synchronization with Customers, Vendors, and Bank Accounts

If some contacts are also customers, vendors, and/or bank accounts, you can synchronize their contact cards with their customer cards, vendor cards, and/or bank account cards.

Before you can synchronize contacts with customers, vendors, and/or bank accounts, you must specify a business relation code for customers, vendors, and bank accounts in the Relationship Management Setup window, on the **Synchronization** tab.



For example, in order for the program to synchronize contact cards with customer cards, you must enter a business relation code in the **Bus. Relation Code for Customers** field.

NOTE: *If you want the program to record the sales document that you print for your customers as an interaction, you must specify a business relation code in the* ***Bus. Relation Code for Customers*** *field.*

NOTE: *If you want the program to record the purchase document that you print for your vendors as an interaction, you must specify a business relation code in the* ***Bus. Relation Code for Vendors*** *field.*

Synchronizing the Contact Card with the Customer Card, Vendor Card, and/or Bank Account Card

After you have specified business relation codes for customers, vendors, and bank accounts, you can synchronize contacts with customers, vendors, and bank accounts by:

- Creating contacts as customers, vendors, and/or bank accounts from the contact card.
- Creating contacts from customers, vendors, and/or bank accounts.
- Linking contacts with existing customers, vendors, and/or bank accounts.

- Some details such as invoicing and posting information do not appear on the contact card. You have to add them manually on the customer card, vendor card, and/or bank account card when you create contacts as customers, vendors, and/or bank accounts.

Consequences of Synchronization

When the contact card is synchronized with the customer card, the vendor card, and/or bank account card, the following is true:

- You only have to update information in one place. For example, if you modify the phone number on the contact card, the program will automatically make the same modification on the customer card, vendor card, and/or bank account card.
- If you have specified a number series for contacts, then when you create a customer card, a vendor card, or a bank account card, the program automatically creates a contact card for the customer, vendor, or bank account.
- You can open the contact's customer card or vendor card. Then you can, and from there create sales quotes, blanket orders, and orders, or purchase quotes, blanket orders, and orders.
- You can have the program record interactions when you perform actions in Microsoft Navision, such as printing orders, blanket orders, creating sales service orders, sending e-mail messages, and so on.
- If you delete a contact linked to a customer, vendor, and/or bank account, only the contact card is removed from the program. The customer card, vendor card, and/or bank account card remain(s) in the program.
- If you delete a customer, vendor, and/or bank account linked to the contact, the contact card remains in the program.

Duplicate Search

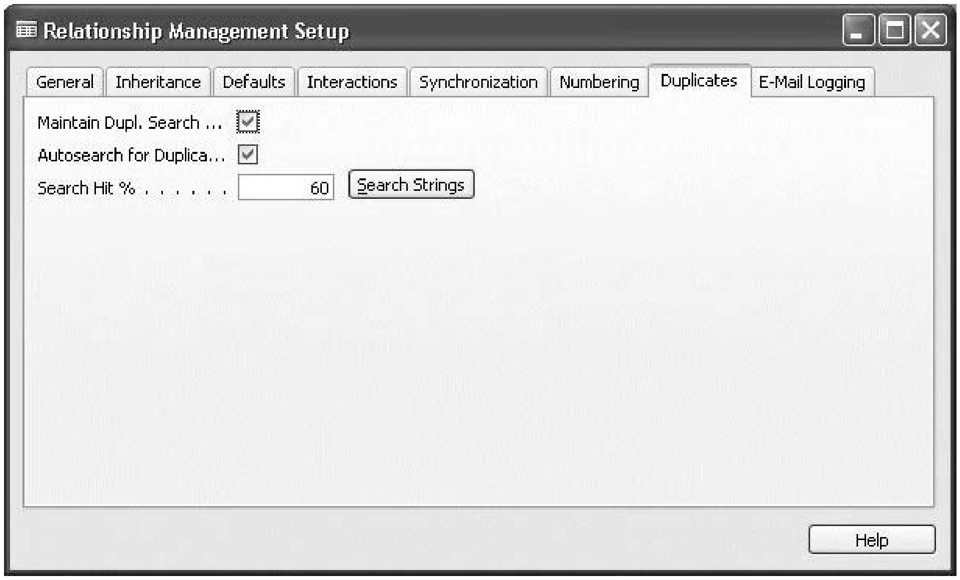
The Sales & Marketing application area enables you to search for duplicate contacts. The contact duplicate search only applies to contact companies (and not to contact persons).

You can search for duplicates in two ways:

- You can have the program automatically generate search strings and search for a possible duplicate each time you enter a contact.
- Or you can search for contacts manually, for example, after you have entered new contacts.

Setting Up the Automatic Search for Duplicates

In the Relationship Management Setup window, on the **Duplicates** tab, you can specify the way you want to search for duplicates.



Select the **Maintain Dupl. Search String** field if you want the program to automatically maintain the search strings you have defined in the Search String Setup window.

Select the **Autosearch for Duplicates** field if you want the program to automatically search for duplicates each time you create a new contact.

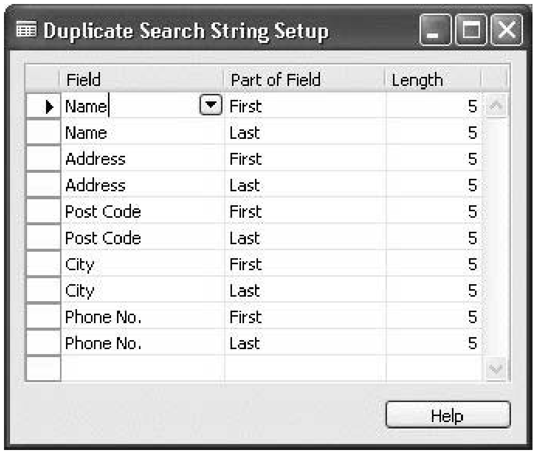
Setting Up Duplicate Search Strings

When searching for duplicates, the program uses search strings. You can set up search strings in the Duplicate Search String Setup window by combining the first and last characters of any of the following fields in the Contact table: **Name**, **Name 2**, **Address**, **Address 2**, **Post Code**, **City**, **Phone No.**, and **VAT Registration No.**

Each time you generate the duplicate search (or each time you create a new company); the program will compare the new contact's search strings with the search strings of the other contacts in the program.

Example

In the Duplicate Search String Setup window, you can set up the following search strings:



Then, for a contact with the following information:

London Postmaster
10 North Lake Avenue
London GB-N12 5XY
VAT Registration No.: 895741963
Tel: 5544 5566

The program will create the following search strings:

LONDO, ASTER, 10NOR, VENUE, LONDO, ONDON, GBN12, 125XY, 89574, 41963, 55445, 45566

The Search Hit Percentage

In the Relationship Management Setup window, on the **Duplicates** tab, you can define a search hit percentage. The search hit percentage is the level of precision you want the program to apply when searching for duplicates.

In the **Search Hit %** field, you can enter a percentage, which indicates how many search strings must be identical between two contacts for the program to consider them duplicates:

- A low percentage results in the program finding many duplicates, but many of these will not be true duplicates. For example, if the percent is equal to 5, the program will consider as duplicates all contacts with 5% of identical search strings.
- A high percentage gives a better chance of finding true duplicates. For example, if the percent is equal to 90, the program will consider as duplicates all contacts with 90% of identical search strings.

Example

Look back at the previous example.

If the search hit percent is equal to 50%, then when five of another contact's search strings (out of ten search strings in total) are identical to the search strings generated for London Postmaster, the program will consider the two contacts duplicates.

E-Mail Logging

With the Sales & Marketing application area, you can exchange e-mail messages with your contacts, customers, vendors, and so on. You can send and receive your e-mail messages either from Microsoft Navision or from Microsoft® Outlook®.

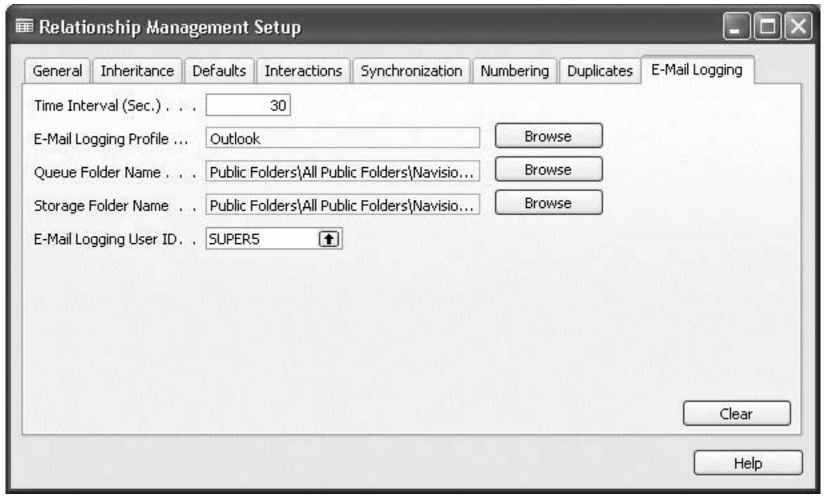
Setting Up the E-Mail Parameters

Before you can exchange e-mail messages this way and have the system store and queue your e-mail messages, you must set up the parameters on the **E-mail Logging** tab, in the Relationship Management Setup window:

1. In the **Time Interval (Sec.)** field, enter the interval in seconds that you want the e-mail dispatcher to use for checking for messages in the Microsoft Navision Queue folder. The default is 30 seconds, but you can change this.
2. In the **E-Mail Logging Profile Name** field, use the **Browse** button to find a profile name to insert in the field. If you only have one Outlook profile (which is normally the case), this profile will automatically be selected when you click the **Browse** button.
3. In the **Queue Folder Name** field, use the **Browse** button to set the folder in Outlook that you want to use as your queue folder for your e-mail messages.
4. In the **Storage Folder Name** field, use the **Browse** button to set the folder in Outlook that you want to use as your storage folder for your e-mail messages.

5 Use the **E-Mail Logging User ID** field to enter the Microsoft Navision user you want to use for the logging, or click the **AssistButton**, and fill in the fields in the Database Logins window that appears. When this Microsoft Navision user logs in, the e-mail dispatcher starts logging with the interval you specified in the **Time Interval (Sec.)** field.

If you use a Microsoft Navision Application Server, this field should not be filled out.



NOTE: *For more detailed information about installation and setup of the e-mail logging functionality, please refer to the following technical white paper: Relationship Management–Navision Technical White Paper.*

Quick Interaction: Lessons Learned

Take a moment to write down three Key Points you have learned from this chapter:

1.

2.

3.