CHAPTER 10: MULTILANGUAGE SALUTATION AND ATTACHMENT

This chapter contains the following sections:

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- Creating Salutation Formulas
- Assigning Salutation Code to the Contact
- Creating an Interaction Using Salutation Code
- Creating an Interaction Using a Segment Including Logging of the Segment
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Introduction

The Multilanguage Salutation and Attachment feature allows you to set up salutations in different languages and attach documents to these salutations in different languages.

When you have set up the salutations, the program automatically chooses the salutation in the language in which the customer or contact is set up.

Therefore, it is very easy to send out a standard document to international customers of different nationalities.

Description of the Multilanguage Salutations and Attachments Feature

To be able to interact with a contact in his or her preferred language and to salute the contact accordingly, the new solution will allow the user to select documents in several languages and to salute the contact in his or her own language. For this to succeed, the new solution will use language as a key element when interacting with contacts.

When you insert a contact, it will be possible to select from different contact salutations depending on the contacts language, profession, sex, and so on. When you interact with a contact, you can choose from at least formal and informal salutations in the same document.

To be able to draw the full potential of the new Multilanguage Salutation solution, it is also possible to have attachments in multiple languages.
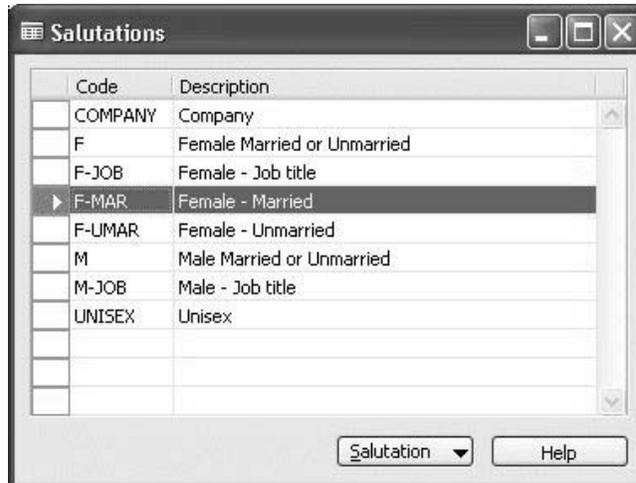
Setting Up Salutation Formulas

In the Salutation Formulas Setup window, you can set up various salutation formulas you can use when sending any kind of correspondence to contacts.

You can create a salutation formula according to the salutation type, formal or informal, language, gender, contact language, job title, and so on.

You set up the salutation formula in the following way:

1. Click SALES & MARKETING→SETUP→INTERACTION→SALUTATIONS, and the Salutations window should appear:

2. Select the code you want to set up, for example, F-MAR (Female – Married), and Click SALUTATION→FORMULAS. The Salutation Formulas window should appear.

3. In the **Language Code** field**,** click the **AssistButton**, and the Languages window should appear. Select a language code from this list, or create a new one, if necessary.

4. Click **OK**.

5. In the **Salutation Type** field, click the **AssistButton**, and a list with the options, Formal or Informal, should appear. Select one.

In the **Salutation** field, type a formula like the one shown in the following window. Here we have chosen to use a formula in English, such as: Dear Ms. %1 %2 %3.
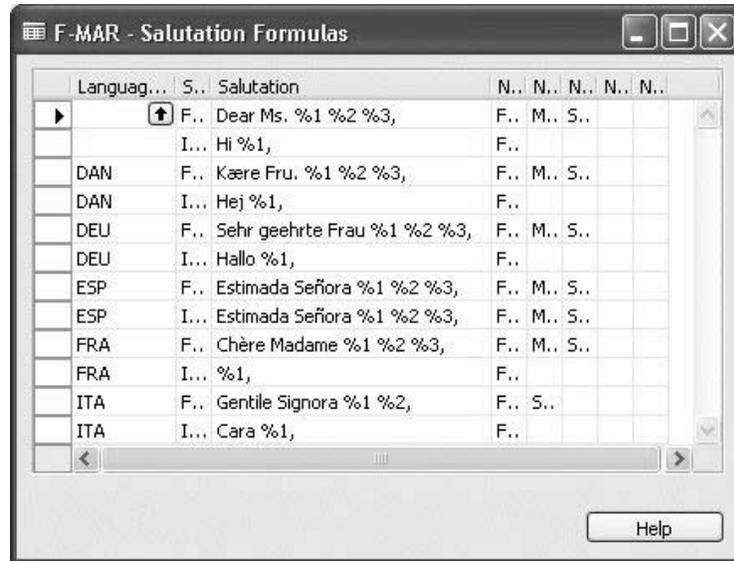
NOTE: If you choose a different language, for example, German, you should type the German word for Dear.

6. By clicking the **AssistButton** in the **Name 1** field**,** you select one of the parameters that will compose the first part of the formula (%1). You can select between Job Title, First Name, Middle Name, Surname, Initials, and Company Name.

7. By clicking the **AssistButton** in the **Name 2** field, you can select another of the parameters that will compose the second part of the formula (%2). Again, you can select among Job Title, First Name, Middle Name, Surname, Initials, and Company Name.

NOTE: You can select up to five parameters (%1 %2 %3 %4 %5), using the same procedure as described in steps 6 and 7.

Assigning Salutation Code to the Contact

When you insert a contact, you can select from different contact salutations depending on the contacts language, profession, sex, and so on.
When the Salutation code has been set up, it should be assigned to the contact on the Contact Card.

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This is done by clicking the **AssistButton** to the right of the **Salutation Code** field and by selecting the salutation code from the list in the Salutations window.

Creating an Interaction Using Salutation Code

When you interact with a contact, you can choose from at least formal and informal salutations in the same document.

You can correspond with a contact or a customer using the salutation code you have just set up.

*NOTE: Before you begin this procedure, you should fill in the **Language Code** field, the **Salutation Code** field, and the **Correspondence Type** field on the Contact Card.*

English is the default language, and, therefore, the language code is blank.

You create the interaction using the following procedure:

1. On the Contact Card, click **Create Interaction**, and the Create Interaction wizard should appear:
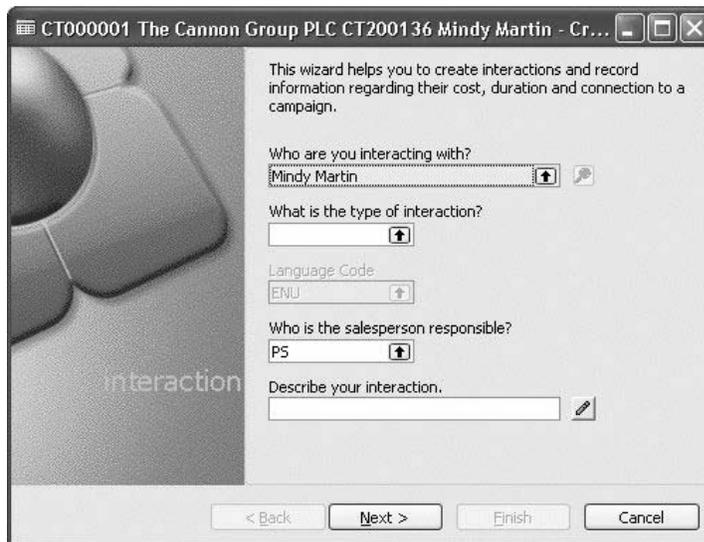
2. In the **What is the type of interaction?** field, you use the AssistButton to select the relevant type of interaction.


NOTE: You should check if the type of interaction has an attachment with it. If not, you can create one by clicking ATTACHMENT→CREATE.

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3. Click **OK**.

4. In the **Describe your interaction** field, you should write the heading of your document.
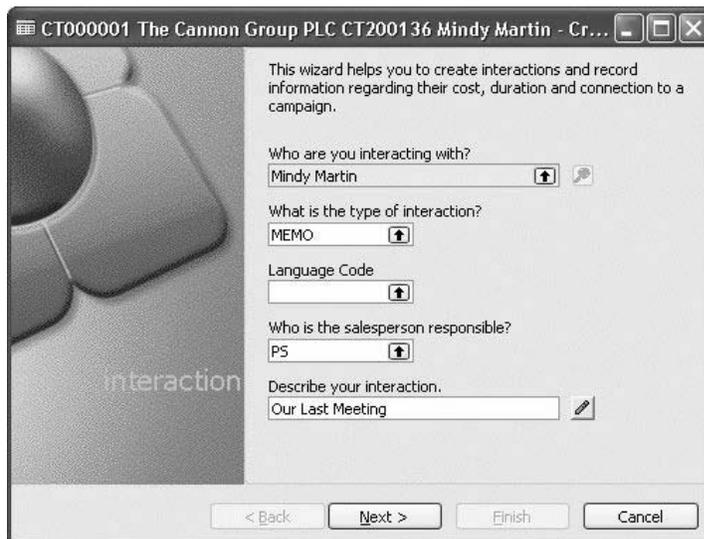
5. Follow the instructions of the wizard until the Word document should appear. Add the necessary text to the document, and close the Word document by clicking the top right hand **X** (close). It is not necessary to save the document because it will be imported into Microsoft® Business Solutions–Navision®.

The following is an example of a Microsoft® Word document:
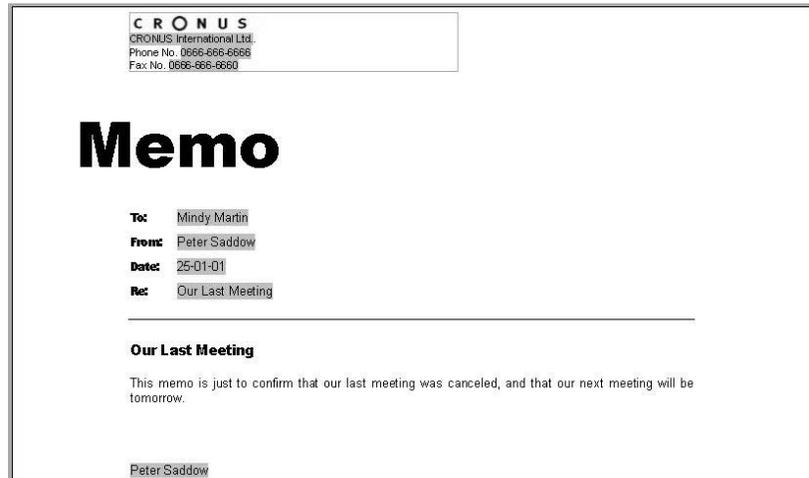
6. Finish the wizard.

7. Print out the document, and send it to the contact.

Creating Interaction using a Segment Including Logging of the Segment

You can create a segment and use it for campaigns to a group of contacts. This is done in the following way:

1. In Sales & Marketing, Marketing, click **Segments**, and the Segment window should appear.

2. Click F3 to create a new segment, and in the **No.** field, press ENTER. The program automatically enters the next available number in the number series for segments.

3. In the **Description** field, enter a description for the segment.

4. Click the **AssistButton** to the right of the **Salesperson Code** field to enter the responsible salesperson.


5. On the **Interaction** tab, in the **Interaction Template** field, select the relevant Interaction Template, for example, GOLF, and click **OK**.

6. In the **Language Code (Default)** field, click the **AssistButton** to open the Interaction Templ. Languages window, and select the language you want to work with.

7. Click the **AssistButton** to the right of the **Attachment** field. The program opens a Word document.

8. Type the text in the Word template and close it. The program will now import the Word document into Microsoft Navision.

9. Repeat this for the other languages.

10. In the **Subject** field, type the Heading of your Word document in the relevant languages.

11. In the Segment window, click FUNCTIONS→SEGMENT→WIZARD, and the Segment Wizard should appear.

12. Click **Next** to continue adding contacts.

13. Fill in the **Business Relations** field and other relevant fields, and click **OK**.

14. Click **Finish**, and a list of all contacts included in the segment should appear.
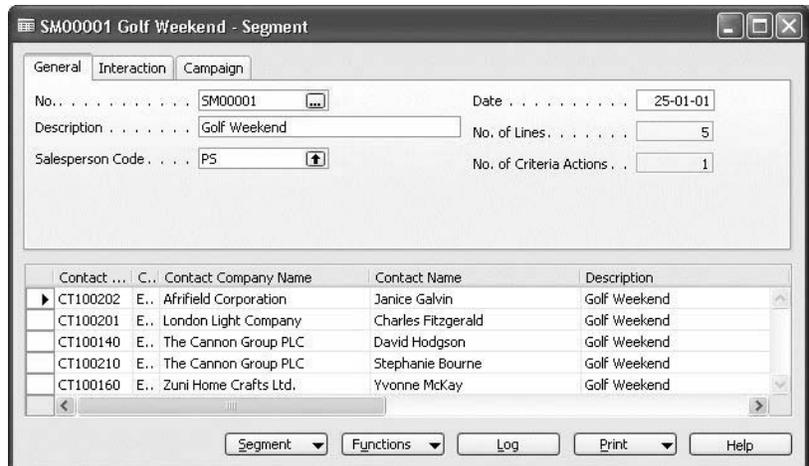
15. Click **Log**, and then click **OK** in the Log Segment batch job request window that should appear:
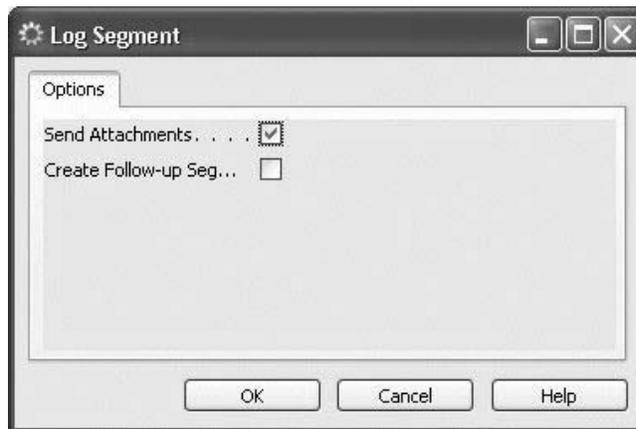
The program will send e-mails to all the contacts included in the segment.

Test Your Skills – Creating Salutation Formulas

Scenario: As a salesperson working for Cronus, you regularly meet prospective customers.
You want to create salutation formulas that can be used when sending correspondence to these contacts.

You know that you can use a number of parameters in the setup: salutation type (formal, informal), language, gender, contact language, and job title.

1. Set up a formal salutation for job title and surname for a male in English.

2. Set up an informal salutation for a male in English.

   Assign the salutation code to a contact card.

Test Your Skills – Creating Interaction Using a Segment

Scenario: This year at Cronus you have decided to sponsor a major national golf tournament, and you would like to invite some of your contacts to attend this event.

1. Create a segment with contacts that are already registered as customers.

2. Use the Golf interaction template.

3. Write the subject of the event and the content of the document.

4. Log the segment in order to create interactions for the contact.

Quick Interaction: Lessons Learned

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

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2.

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3.

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