

APPENDIX D: SOLUTIONS TO TEST YOUR SKILLS

Setting up a Contact Company (CH 3)

The contact card for MultiSport Ltd. should look like this:

The screenshot shows the 'CT000151 MultiSport Ltd. - Contact Card' window with the 'General' tab selected. The fields are as follows:

Field	Value
No.	CT000151
Type	Company
Company No.	CT000151
Company Name	MultiSport Ltd.
Name	MultiSport Ltd.
Address	2200 Newport Street
Address 2	
Post Code/City	GB-N12 5XY London
Country Code	GB
Search Name	MULTISPORT LTD.
Phone No.	5050-4545
Salesperson Code	RL
Salutation Code	COMPANY
Last Date Modified	10-02-03
Date of Last Interaction	
Last Date Attempted	
Next To-do Date	

Below the fields is a table with columns 'Question', 'Answer', 'Que...', and 'Last Dat...'. The table is currently empty. At the bottom are buttons for 'Contact', 'Functions', 'Create Interact', and 'Help'.

When you have assigned an industry group to MultiSport, the **Segmentation** tab on the contact card should look like this:

The screenshot shows the 'CT000151 MultiSport Ltd. - Contact Card' window with the 'Segmentation' tab selected. The fields are as follows:

Field	Value
No. of Mailing Groups	0
No. of Business Relations	0
No. of Industry Groups	1
No. of Job Responsibili...	0
Organizational Level C...	
Exclude from Segment	<input type="checkbox"/>

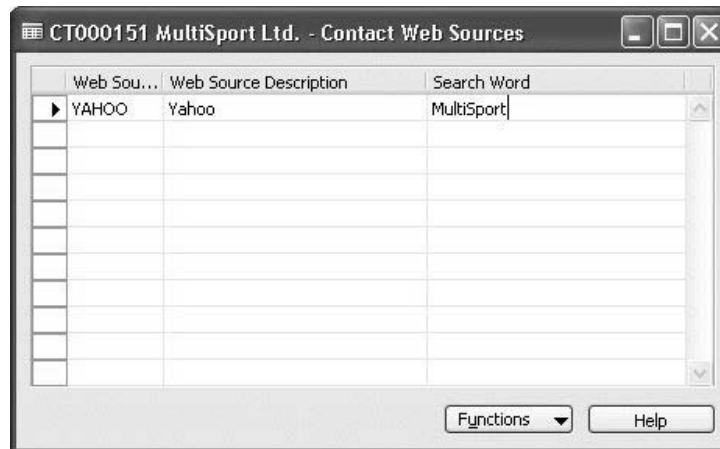
Below the fields is a table with columns 'Question', 'Answer', 'Que...', and 'Last Dat...'. The table is currently empty. At the bottom are buttons for 'Contact', 'Functions', 'Create Interact', and 'Help'.

When you have assigned a business relation code to MultiSport, the Contact Business Relations window should look like this:



On the contact card, on the **Segmentation** tab, the **No. of Business Relations** field should contain the number 1.

When you have assigned a Web source to MultiSport, the Contact Web Sources window should look like this:



Creating Contact Persons (CH 3)

When you have entered John Smith's details, the Name Details window should look like this:

CT000152 John - Name Details

General

Salutation Code M

Job Title Purchaser

Initials JS

First Name John

Middle Name

Surname Smith

Language Code

Salutations Help

The program automatically enters the contact person's full name in the Name field on the contact card.

The contact card you have just created looks like this:

CT000152 John Smith - Contact Card

General Communication Segmentation Foreign Trade Commerce Portal

No. CT000152

Type Person

Company No. CT000151

Company Name MultiSport Ltd.

Name John Smith

Address 2200 Newport Street

Address 2.

Post Code/City GB-N12 5XY

Country Code GB

Search Name JOHN SMITH

Phone No. 5050-4567

Salesperson Code RL

Salutation Code M

Last Date Modified 10-02-03

Date of Last Interaction

Last Date Attempted

Next To-do Date

Question	Answer	Que...	Last Dat...

Contact Functions Create Interact Help

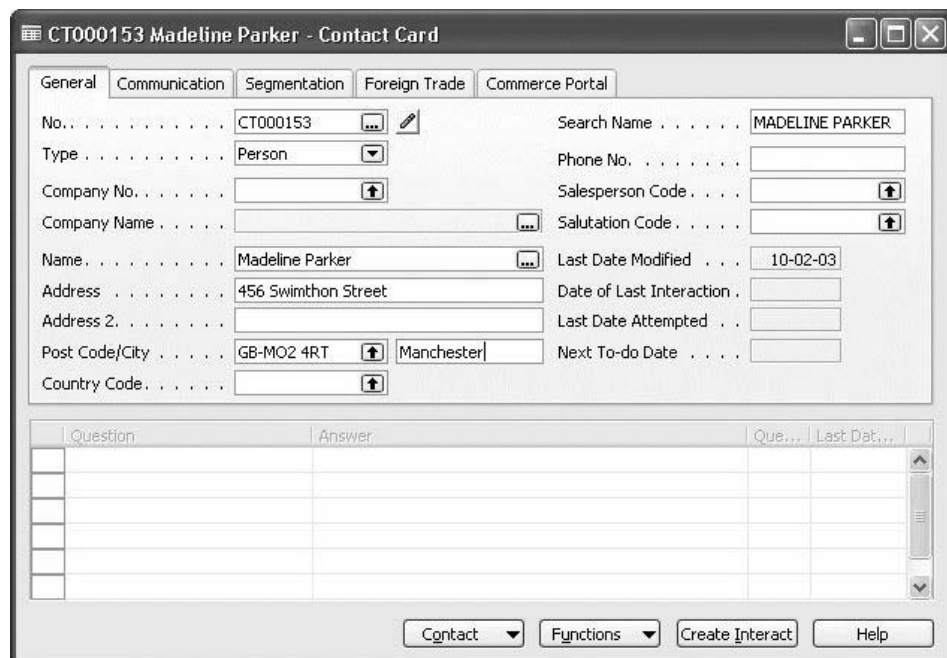
When you have entered John Smith's job responsibility, the Contact Job Responsibility window will look like this:



The screenshot shows a window titled "CT000152 John Smith - Cont...". It contains a table with two columns: "Job Res..." and "Job Responsibility Description". The first row is selected and shows "PURCHASE" and "Purchase Responsible". There are several empty rows below. A "Help" button is at the bottom right.

Job Res...	Job Responsibility Description
PURCHASE	Purchase Responsible

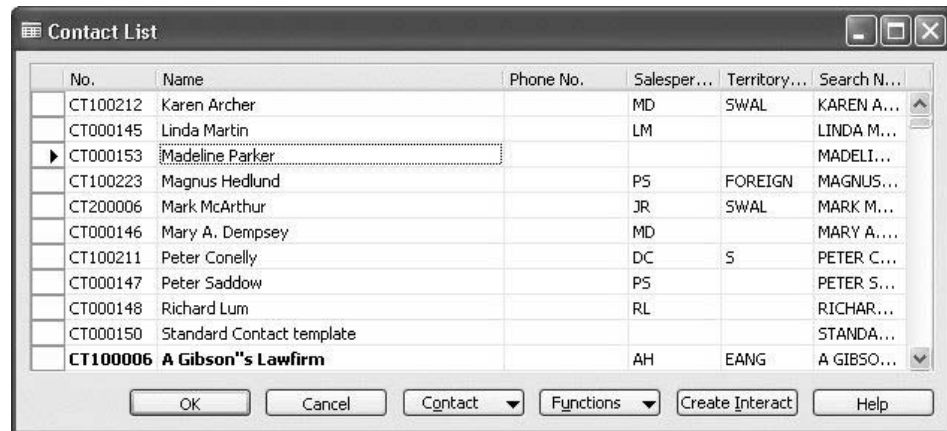
The contact card for Madeline Parker should look like this:



The screenshot shows a window titled "CT000153 Madeline Parker - Contact Card". It has tabs for "General", "Communication", "Segmentation", "Foreign Trade", and "Commerce Portal". The "General" tab is active, showing fields for "No." (CT000153), "Type" (Person), "Company No.", "Company Name", "Name" (Madeline Parker), "Address" (456 Swinthon Street), "Address 2", "Post Code/City" (GB-MO2 4RT, Manchester), "Country Code", "Search Name" (MADELINE PARKER), "Phone No.", "Salesperson Code", "Salutation Code", "Last Date Modified" (10-02-03), "Date of Last Interaction", "Last Date Attempted", and "Next To-do Date". Below these fields is a table with columns "Question", "Answer", "Que...", and "Last Dat...". At the bottom are buttons for "Contact", "Functions", "Create Interact", and "Help".

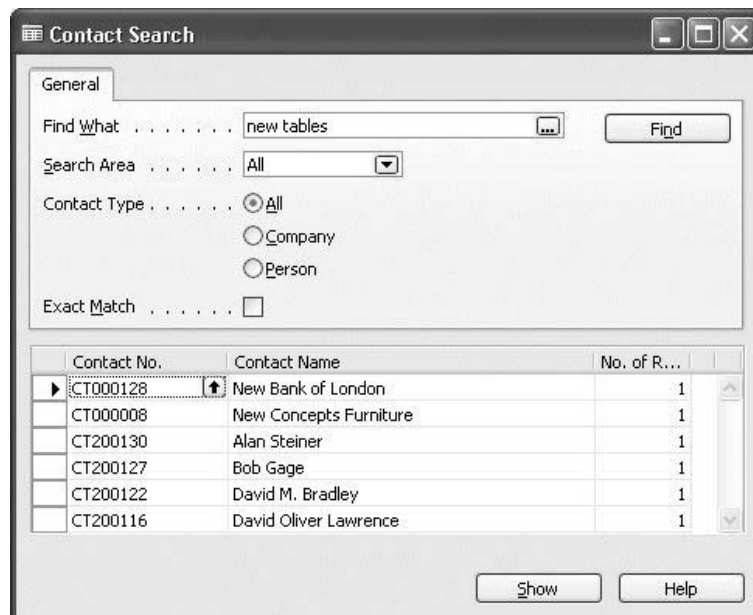
Question	Answer	Que...	Last Dat...

The Contact List window should look like this:

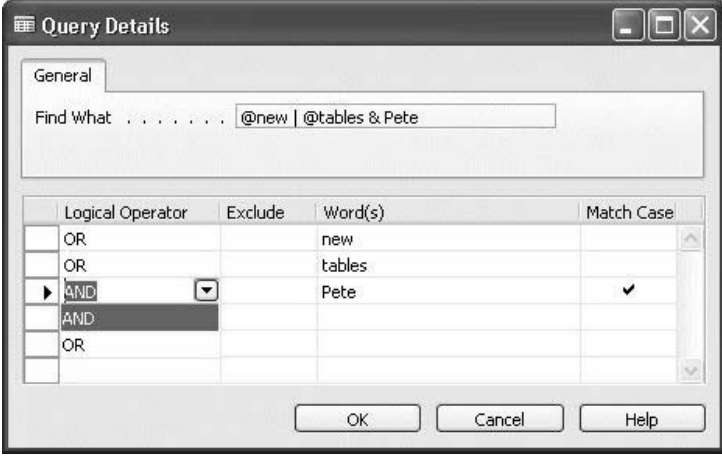


Finding a Contact (CH 3)

After you have entered new tables in the **Find What** field, you will get many results:



In order to find the contact you need right now, click the **AssistEdit** button in the **Find What** field to open the Query Details window. Using the logical AND operator, add the word Pete.

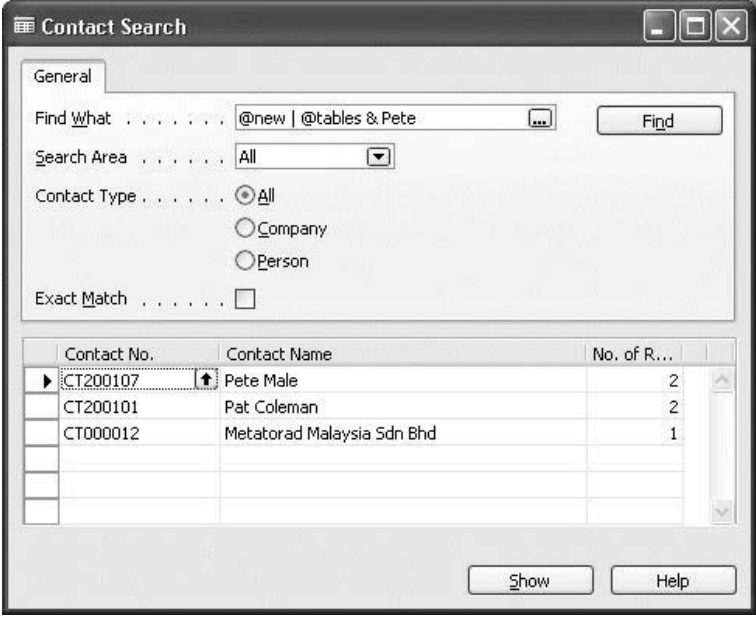


The Query Details dialog box is shown with the 'General' tab selected. The 'Find What' field contains the text '@new | @tables & Pete'. Below this is a table for defining the query logic.

	Logical Operator	Exclude	Word(s)	Match Case
<input type="checkbox"/>	OR		new	
<input type="checkbox"/>	OR		tables	
<input checked="" type="checkbox"/>	AND	<input checked="" type="checkbox"/>	Pete	<input checked="" type="checkbox"/>
<input type="checkbox"/>	AND			
<input type="checkbox"/>	OR			

Buttons at the bottom: OK, Cancel, Help.

In this case you will find the exact contact you need – Pete Male from Furnitures At Work:



The Contact Search dialog box is shown with the 'General' tab selected. The 'Find What' field contains the text '@new | @tables & Pete'. The 'Search Area' is set to 'All'. The 'Contact Type' is set to 'All'. The 'Exact Match' checkbox is unchecked. Below this is a table showing search results.

Contact No.	Contact Name	No. of R...
CT200107	Pete Male	2
CT200101	Pat Coleman	2
CT000012	Metatorad Malaysia Sdn Bhd	1

Buttons at the bottom: Show, Help.

Creating a Contact as a Customer (CH 3)

You should be able to see the new customer card for MultiSport from the contact card by clicking CONTACT→CUSTOMER/VENDOR/BANK ACC. The customer card for MultiSport Ltd. should look like this:

Click the **Segmentation** tab, and in the **No. of Business Relations** field, check that the Prospect code no longer exists.

Linking a Bank Account Card to a Contact Card (CH 3)

The contact card for the New Bank of London should now include the details from the bank account card just like the following window illustration:

Deleting a Customer Card (CH 3)

You should no longer be able to see the customer card for MultiSport, but the contact card should still be in the Sales & Marketing application area.

The program has automatically removed the business relation code for customers from the Contact Business Relations window for MultiSport Ltd.

Final Exercise (CH 3)

The contact card for Rent-a-Bike should look like this:

CT000152 Rent-a-Bike - Contact Card

General Communication Segmentation Foreign Trade Commerce Portal

No. CT000152

Type Company

Company No. CT000152

Company Name Rent-a-Bike

Name Rent-a-Bike

Address 123 Main Street

Address 2.

Post Code/City GB-E12 5TG Edinburgh

Country Code

Search Name RENT-A-BIKE

Phone No. 444-555

Salesperson Code

Salutation Code COMPANY

Last Date Modified 10-02-03

Date of Last Interaction

Last Date Attempted

Next To-do Date

Question	Answer	Que...	Last Dat...

Contact Functions Create Interact Help

The Name Details window for Eric Davis should look like this:

CT000153 Eric Davis - Name Details

General

Salutation Code M

Job Title Manager

Initials

First Name Eric

Middle Name

Surname Davis

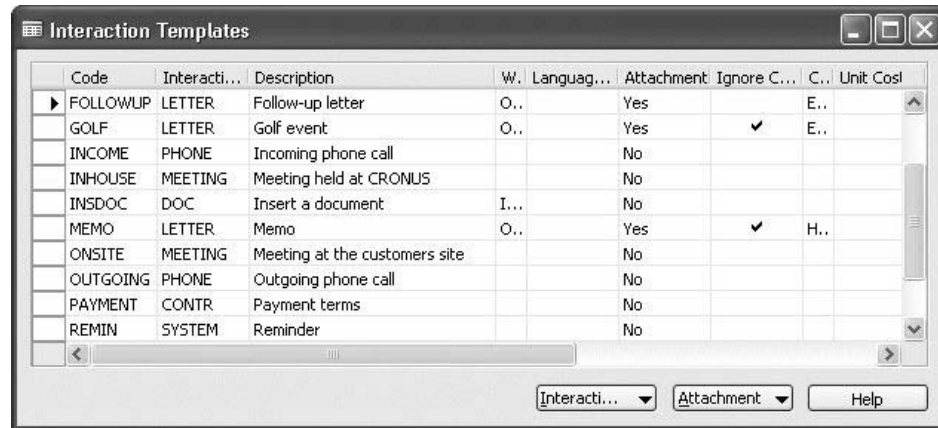
Language Code

Salutations Help

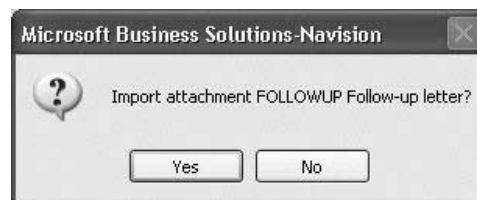
There should be a customer card for Rent-a-Bike, with just the customer business relation assigned to it, but a vendor card for Rent-a-Bike should no longer exist.

Create an Interaction Template with an Attachment (CH 4)

When you have created the interaction template and the attachment, the Interaction Templates window should look like this:

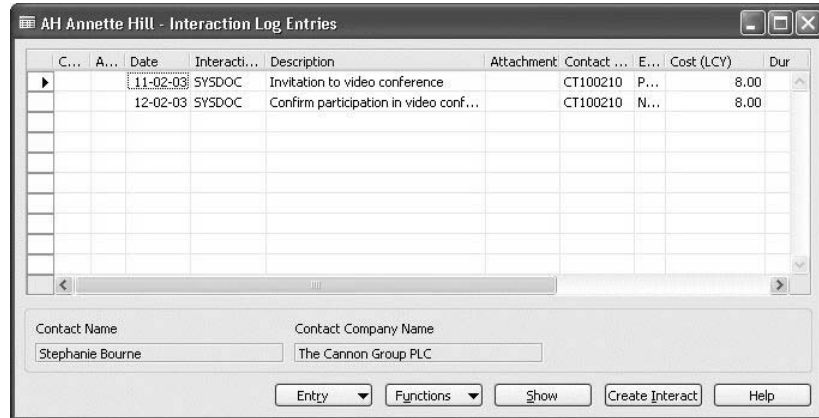


When you have finished creating the Word document and you close the document, this message appears:



Recording Interactions (CH 4)

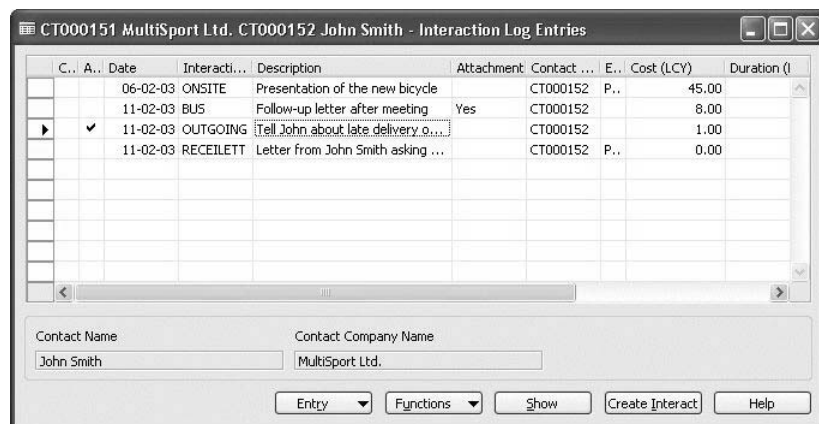
The Interaction Log Entries window should now display three interactions involving John Smith.



Find the letter in the Interaction Log Entries window in the line containing the interaction recording the letter by clicking the **AssistButton** to the right of the **Attachment** field. The program automatically launches Microsoft Word and opens the letter.

Making a Phone Call (CH 4)

You should be able to view the interaction you have just created in the Interaction Log Entries window for John Smith.



Note the check mark in the **Attempt Failed** field, which indicates that your attempt to talk to John failed.

Sending an E-Mail (CH 4)

You should be able to view the interaction you have just created in the Interaction Log Entries window for John Smith.

C...	A...	Date	Interacti...	Description	Attachment	Contact ...	E...	Cost (LCY)	Dur
		06-02-03	ONSITE	Presentation of the new bicycle		CT000152	P...	45.00	
		11-02-03	BUS	Follow-up letter after meeting	Yes	CT000152		8.00	
		11-02-03	SYSDOC	Delayed delivery of ordered bikes		CT000152		8.00	
	✓	11-02-03	OUTGOING	Tell John about late delivery of bic...		CT000152		1.00	
		11-02-03	RECEILETT	Letter from John Smith asking for ...		CT000152	P...	0.00	

Contact Name: John Smith
Contact Company Name: MultiSport Ltd.

Buttons: Entry, Functions, Show, Create Interact, Help

Creating Automatically Recorded Interaction (CH 4)

The Interaction Log Entries window for MultiSport should now look like this:

C...	A...	Date	Interacti...	Description	Attachment	Contact ...	E...	Cost (LCY)	Dur
		06-02-03	ONSITE	Presentation of the new bicycle		CT000152	P...	45.00	
		11-02-03	SYSDOC	Quote 1002		CT000151		0.00	
		11-02-03	SYSDOC	Order 1002		CT000151		0.00	
		11-02-03	BUS	Follow-up letter after meeting	Yes	CT000152		8.00	
		11-02-03	SYSDOC	Delayed delivery of ordered bikes	Yes	CT000152		8.00	
	✓	11-02-03	OUTGOING	Tell John about late delivery of bic...		CT000152		1.00	
		11-02-03	RECEILETT	Letter from John Smith asking for ...		CT000152	P...	0.00	

Contact Name: MultiSport Ltd.
Contact Company Name: MultiSport Ltd.

Buttons: Entry, Functions, Show, Create Interact, Help

You can view the sales order from the Interaction Log Entries window by selecting the line with the order and clicking **Show**.

Creating a Sales Quote and an Order for the Interaction Log (CH 4)

When you have completed all the exercises, the Interaction Log Entries window for Rent-a-Bike should look like this:

C...	A...	Date	Interacti...	Description	Attachment	Contact ...	E...	Cost (LCY)	Du
		06-02-03	BUS	Letter about tires and bells	Yes	CT000152	P...	8.00	
		11-02-03	SYSDOC	Quote 1001		CT000152		8.00	
		11-02-03	SYSDOC	Order 1001		CT000152		8.00	

Contact Name: Rent-a-Bike
Contact Company Name: Rent-a-Bike

Buttons: Entry, Functions, Show, Create Interact, Help

Creating a Segment (CH 5)

When you have created the segment, the Segment window should look like this:

General Interaction Campaign

No. : SM00005 Date : 25-01-01
Description : Golf Tournament No. of Lines : 18
Salesperson Code : DC No. of Criteria Actions : 1

Contact No.	C..	Contact Company Name	Contact Name	Description
CT2000185		TelecomPetit	Allan Vinther-Wahl	Golf Tournament
CT100185		TelecomPetit	Arlene Huff	Golf Tournament
CT200019		TelecomPetit	Kevin Verboort	Golf Tournament
CT200131		TelecomPetit	Linda Moschell	Golf Tournament

Buttons: Segment, Functions, Log, Print, Help

Planning a Campaign (CH 5)

1. When you have recorded the new campaign to promote the Millennium office furniture in the program, the campaign card should look like this:

The screenshot shows a window titled "CP0001 Promoting Millenium Series - Campaign Card". It has two tabs: "General" and "Invoicing". The "General" tab is active. The fields are as follows:

No.	CP0001	Salesperson Code	AH
Description	Promoting Millenium Series	Last Date Modified	25-01-01
Status Code	1-PLAN	Activated	<input type="checkbox"/>
Starting Date			
Ending Date.			

At the bottom, there are three buttons: "Campaign", "Functions", and "Help".

2. When you have modified the status of the campaign, the campaign card should look like this:

The screenshot shows the same window as before, but the Status Code has been changed to "5-START".

No.	CP0001	Salesperson Code	AH
Description	Promoting Millenium Series	Last Date Modified	25-01-01
Status Code	5-START	Activated	<input type="checkbox"/>
Starting Date			
Ending Date.			

At the bottom, there are three buttons: "Campaign", "Functions", and "Help".

3. When you have set up the segment, the Segment window should look like this:

Contact	C.	Contact Company Name	Contact Name	Description
---------	----	----------------------	--------------	-------------

4. When you have selected the contact persons who are prospective customers and responsible for purchases, the Segment window should look like this:

Contact	C.	Contact Company Name	Contact Name	Description
CT200073		Capital Office Furnishings	Fabricio Noriega	Target for Millennium Campaign
CT200022		DanMabler	Lone Kuhlmann	Target for Millennium Campaign
CT200091		eAmericonda	Sisser Wichmann	Target for Millennium Campaign
CT100196		Ergonomic Office Systems	Shelley Dick	Target for Millennium Campaign

5. When you have removed all the contacts that belong to the Christmas card mailing group, there should be fewer contacts in the **No. of Lines** field, as shown in the following picture:

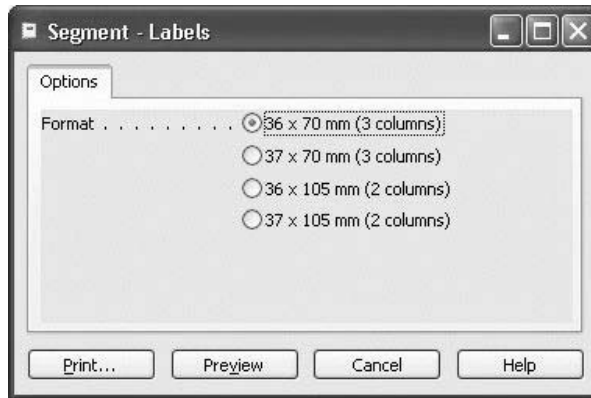
Contact	C.	Contact Company Name	Contact Name	Description
CT200073		Capital Office Furnishings	Fabricio Noriega	Target for Millennium Campaign
CT200022		DanMabler	Lone Kuhlmann	Target for Millennium Campaign
CT100196		Ergonomic Office Systems	Shelley Dick	Target for Millennium Campaign
CT100197		Furnitures At Work	Amy E. Alberts	Target for Millennium Campaign

6. When you save the segmentation criteria that you have defined, the Save Segment Criteria window should look like this:

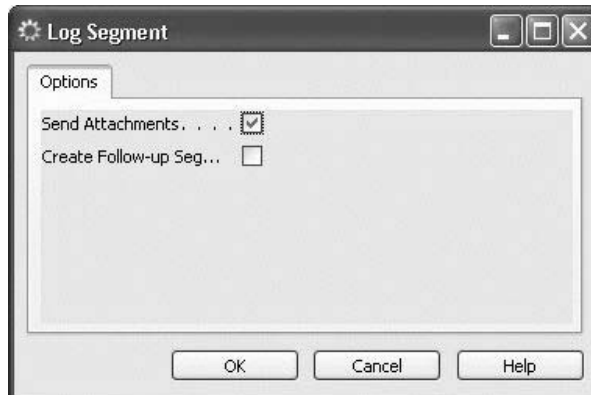
7. When you have set up the letter that you want to send to all the contacts in the segment using the CANVAS interaction template, the **Interaction** tab should look like this:

Contact	C.	Contact Company Name	Contact Name	Description
CT200073		Capital Office Furnishings	Fabricio Noriega	Target for Millennium Campaign
CT200022		DanMabler	Lone Kuhlmann	Target for Millennium Campaign
CT100196		Ergonomic Office Systems	Shelley Dick	Target for Millennium Campaign
CT100197		Furnitures At Work	Amy E. Alberts	Target for Millennium Campaign

8. After you have personalized the letter to Amy E. Alberts, the program automatically enters Unique in the **Attachment** field to indicate that the attachment is personalized.
9. When you print the segment labels, the Segment - Labels window should look like this:



10. When you print the letters and record them as interactions in the program, the Log Segment window should look like this:



Recording Responses (CH 5)

When you have created a segment using the segment that you have already logged, the program automatically fills in the lines in the Segment window with the contacts in the first segment. The Segment window should look like this:

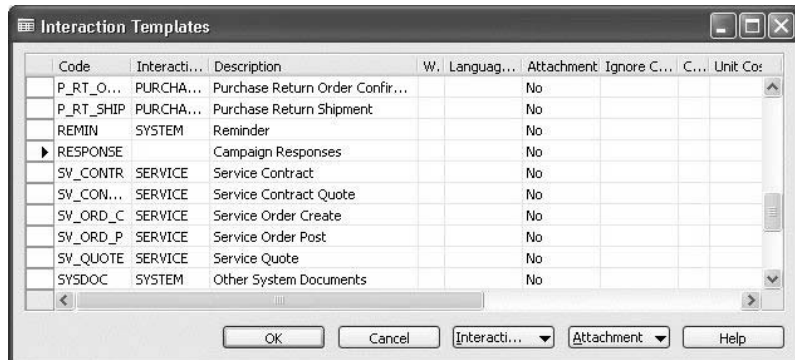
Contact	C.	Contact Company Name	Contact Name	Description
CT200073		Capital Office Furnishings	Fabricio Noriega	Follow up on Millennium Campe
CT200022		DanMöbler	Lone Kuhlmann	Follow up on Millennium Campe
CT100196		Ergonomic Office Systems	Shelley Dick	Follow up on Millennium Campe
CT100197		Furnitures At Work	Amy E. Alberts	Follow up on Millennium Campe

When you have manually removed the contact (Shelley Dick) who did not respond to the campaign, the Segment window should look like this:

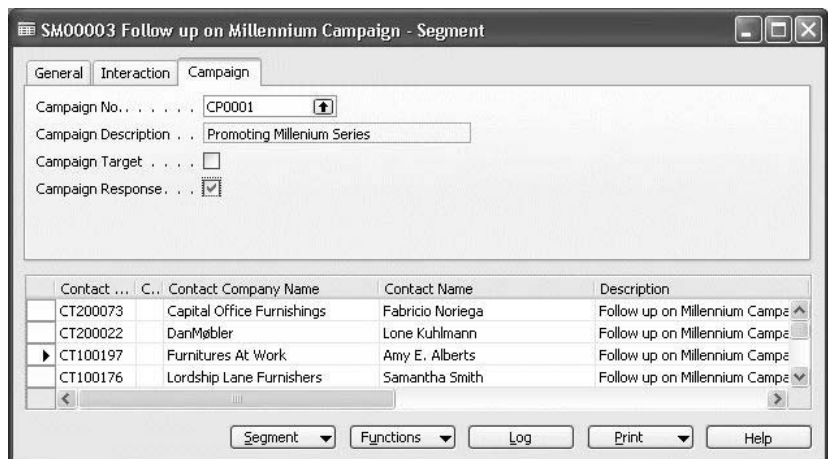
Contact	C.	Contact Company Name	Contact Name	Description
CT200073		Capital Office Furnishings	Fabricio Noriega	Follow up on Millennium Campe
CT200022		DanMöbler	Lone Kuhlmann	Follow up on Millennium Campe
CT100197		Furnitures At Work	Amy E. Alberts	Follow up on Millennium Campe
CT100176		Lordship Lane Furnishers	Samantha Smith	Follow up on Millennium Campe

Microsoft Navision Relationship Management

1. There is no interaction template for recording responses to campaigns. When you create one, the Interaction Templates window should look like this:



When you have specified that these contacts have responded to the campaign, the **Campaign** tab should look like this:



- When you log the segment, the program automatically creates an entry for the campaign to record this action. You can view it in the Campaign Entries window for the Promoting Millennium Series campaign.

Entry No.	C.	Date	Description	Cost (LCY)	Duration (Min.)	No.
1		25-01-01	Follow up on Millennium Campa...	0,00		0

Using Saved Segmentation Criteria (CH 5)

- When you have set up the new segment for the Futurus campaign, the Segment window should look like this:

Contact ...	C.	Contact Company Name	Contact Name	Description
*▶				

2. When you have used the saved segment criteria to select the contacts for the new Futurus campaign, the program automatically fills in the lines of the Segment window with all the contacts that currently fulfill the defined criteria. The Segment window should look like this:

Contact	Contact Company Name	Contact Name	Description
CT200073	Capital Office Furnishings	Fabricio Noriega	Target for Futurus Campaign
CT200022	DanMöbler	Lone Kuhlmann	Target for Futurus Campaign
CT100196	Ergonomic Office Systems	Shelley Dick	Target for Futurus Campaign
CT100197	Furnitures At Work	Amy E. Alberts	Target for Futurus Campaign

Creating a Recurring To-do (CH 6)

You create the to-do by completing the Create To-do wizard, making sure to specify in the last page of the wizard that the to-do is recurring.

The last page of the Create To-do wizard should look like this:

If the to-do is recurring, you can now specify optional information.

☒ Recurring to-do.

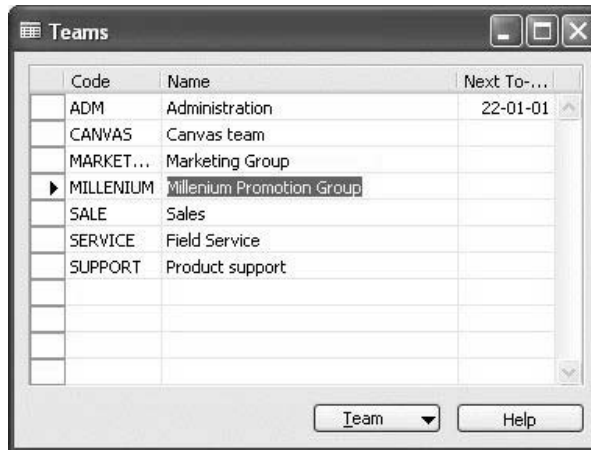
What is the recurring date interval?
+1W

Which date do you want to calculate the due date from?
Due Date

It is also possible to apply/remove recurrence afterwards on the **To-Do Card, Recurring** tab.

Creating Teams of Salespeople (CH 6)

1. When you have created the Millennium Promotion team, the Teams window should look like this:



The Team Salespeople window should look like this:



- When you have created the to-do and assigned it to Debra L. Core, the to-do should appear in Debra L. Core's To-do List window:

Closed	Starting	T.	Description	P.	S.	No.	Date Clo...	Canceled	Comment	C
✓	21-12-00		Identify key persons	N..	C..	TD100044	21-12-00			C
✓	28-12-00		Verify quality of opportunity	H..	C..	TD100045	28-12-00			C
✓	04-01-01		Identify key persons	N..	C..	TD100046	04-01-01			C
✓	13-01-01		Verify quality of opportunity	H..	C..	TD100039	13-01-01			C
✓	15-01-01		Verify quality of opportunity	H..	C..	TD100019	15-01-01			C
✓	15-01-01		Verify quality of opportunity	H..	C..	TD100023	15-01-01			C
	19-01-01		Send letter to Patrick Dalle	N..	N..	TD000074				C
	20-01-01		Identify key persons	N..	I..	TD100040				C
	22-01-01		Identify key persons	N..	I..	TD100020				C
	22-01-01		Identify key persons	N..	I..	TD100024				C

Contact Name: Patrick Dalle Contact Company Name: Lovaina Contractors

To-do Functions Create To-do Help

- When you create an interaction for the to-do from Debra's salesperson card, the first page of the Create Interaction wizard should look like this:

DC Debra L. Core - Create Interaction

This wizard helps you to create interactions and record information regarding their cost, duration and connection to a campaign.

Who are you interacting with?
Patrick Dalle

What is the type of interaction?
BUS

Language Code

Who is the salesperson responsible?
DC

Describe your interaction.
Send letter about Millenium series

< Back Next > Finish Cancel

Assigning Activities (CH 6)

1. When you have set up the activity made up of five to-dos, the Activity window should look like this:

T..	Description	P..	Date Formula
<input type="checkbox"/>	Analyze market data	N..	
<input type="checkbox"/>	Prepare brochure text	N..	+1W
<input type="checkbox"/>	M.. Meet with designer	N..	+1W+2D
<input type="checkbox"/>	M.. Meet with printer	N..	+2W
<input type="checkbox"/>	Send brochure and cover letter	N..	+4W

2. When you have assigned the activity to the Millennium Promotion team using the Assign Activity wizard, all the to-dos for the activity will appear in the To-do List window for the team:

Closed	Starting	T..	Description	P..	S..	No.	Date Clo...	Canceled	Comment
<input type="checkbox"/>	25-01-01	<input type="checkbox"/>	Analyze market data	N..	N..	TD000081			
<input type="checkbox"/>	01-02-01	<input type="checkbox"/>	Prepare brochure text	N..	N..	TD000082			
<input type="checkbox"/>	03-02-01	M..	Meet with designer	N..	N..	TD000083			
<input type="checkbox"/>	08-02-01	M..	Meet with printer	N..	N..	TD000084			
<input type="checkbox"/>	22-02-01	<input type="checkbox"/>	Send brochure and cover letter	N..	N..	TD000085			

3. You can delegate each of the to-dos from its to-do card by selecting the desired team member in the **Salesperson Code** field. For example, here is the to-do card for the first to-do, now delegated to Peter Sadow:

TD000081 Analyze market data - To-do Card

General Related Activities Recurring

No. TD000081 Status Not Started

Description Analyze market data Priority Normal

Location Type

Salesperson Code PS All Day Event

No. of Attendees 0 Starting Date 25-01-01

Attendees Accepted No. 0 Starting Time

Contact No. Duration 1 day

Contact Name Ending Date 25-01-01

Contact Company Name Ending Time 0:00:00

Team Code Canceled

Completed By Closed

Date Closed

To-do Functions Create To-do Help

Deleting Closed To-dos (CH 6)

1. When you find out how many to-dos Debra L. Core and John Roberts had in the 1st quarter, the To-dos window should look like this (your number of to-dos may differ from those below):

No. of To-dos - To-dos

General Filters

Show as Lines Salesperson

Show No. of To-dos

No.	Name	4/2000	1/2001	2/2001	3/2001	4/2001
AH	Annette Hill			1		
DC	Debra L. Core			6		
JR	John Roberts			2		
MD	Mary A. Dempsey					
PS	Peter Sadow			1		
RL	Richard Lum			1		

1 7 31 3 12 Help

Adding to a To-do of the Meeting Type (CH 6)

1. When you have created the to-do of type meeting, the Attendee Scheduling window should look like this:

2. Click in the **Attendee Type** field in the new line of the table, and select Contact.
3. Click in the Attendee No. for that line, and click the **AssistButton** to the right of this field. Find Ann Beebe in the list of contacts, and click **OK**. Select the **Attendee Name** field to display the name of the new attendee.

Sending E-Mail Meeting Invitations Using MAPI (CH 6)

1. Click SALES & MARKETING→SALES→SALESPEOPLE.
2. On the salesperson card, select Annette Hill, and click **Salesperson, To-dos**.
3. In the To-do List window, click **Create To-do**. The Create To-do wizard should appear.
4. In the wizard, fill in the mandatory fields and relevant optional fields, as described in the exercise.
5. In Annette Hill's To-do list, select the to-do that you have created, and click **To-do, Attendee Scheduling**.

- Make sure that the **Send Invitation** check box is selected for each attendee.

Attendan...	A...	Attendee...	Attendee Name	S...	S...	Invitation...	I...
► To-do O...	S...	AH	Annette Hill			<input type="checkbox"/> None	
Required	S...	RL	Richard Lum			<input checked="" type="checkbox"/> None	
Required	C...	CT100160	Yvonne McKay			<input checked="" type="checkbox"/> None	

- Click **FUNCTIONS**→**SEND INVITATIONS**. Confirm the subsequent message.
- Clear the **Send Invitation** check box for Yvonne McKay, and click **FUNCTIONS**→**SEND INVITATIONS**.

Attendan...	A...	Attendee...	Attendee Name	S...	S...	Invitation...	I...
► To-do O...	S...	AH	Annette Hill			<input type="checkbox"/> None	
Required	S...	RL	Richard Lum			<input checked="" type="checkbox"/> None	
► Required	C...	CT100160	Yvonne McKay			<input type="checkbox"/> None	

- Confirm the subsequent message.

Microsoft Business Solutions-Navision

Invitations have already been sent to Attendees with selected Send Invitation check boxes. Do you want to resend the invitations?

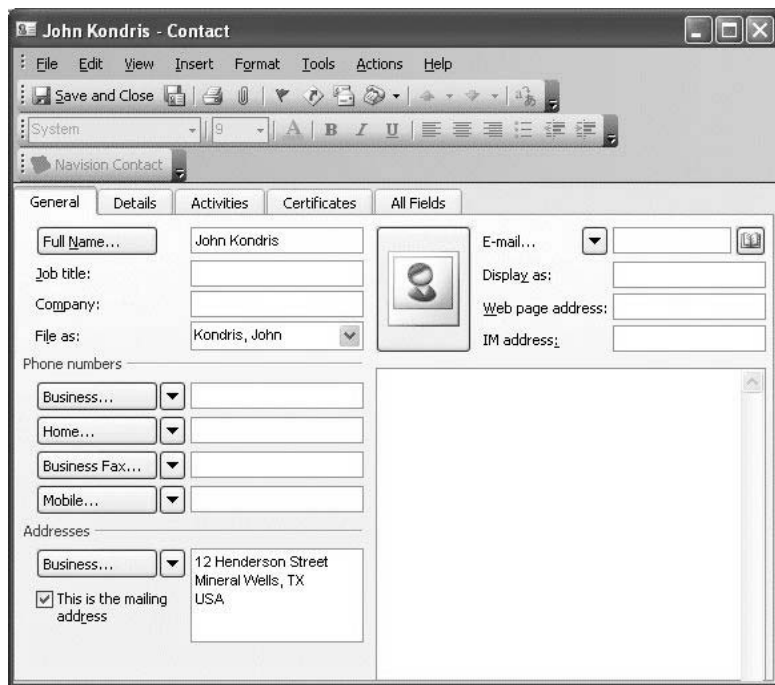
Yes No

Setting Up Synchronization with Outlook (CH 7)

1. Set up Outlook Integration parameters on the **Outlook Integration** tab of your salesperson card. Specify your **Microsoft Navision User ID** and **Outlook Profile Name**, and set up the Outlook folders that you will need for integration.
2. Run the Synchronize with Outlook batch job by going to Sales & Marketing, Sales, Outlook Integration, and by clicking Synchronize with Outlook, OK.

Integrating a Contact from Outlook (CH 7)

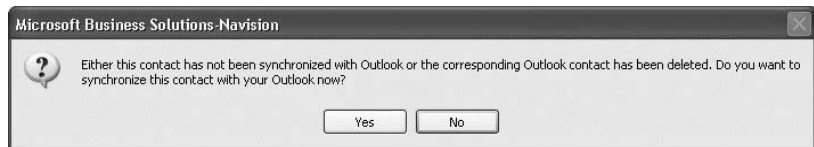
1. In the Outlook Contacts folder click NEW→CONTACT.
2. Fill in the name and address of the contact. The Outlook Contact card should look like this:



3. Go to Microsoft Navision and find a corresponding to-do in the list of contacts. Alternatively, you can click the Microsoft Navision **Contact** button on the Outlook contact card, if the appropriate toolbar is installed.

Integrating a Contact from Navision (CH 7)

1. Click SALES & MARKETING→MARKETING→CONTACTS.
2. Press F3 to create a blank contact card.
3. Enter all the information you have, select Person in the **Type** field, and close the Contact Card.
4. On the Contact Card click FUNCTIONS→SHOW OUTLOOK ITEM, and click **Yes** to confirm the following message:



Integrating a Contact From Navision (CH 7)

1. Open your Salesperson Card, and click SALESPERSON→CONTACTS. The Contact List window appears.
2. Click CONTACT→CARD, and press F3 to create a blank contact card.
3. Enter all the information you have, select Company in the **Type** field, and close the Contact Card.

4. Go to Outlook, and look up the Contact card for this company.

5. To assign contact John Kondris to this company, find his contact card in Microsoft Navision.
6. Click the **AssistButton** in the **Company No.** field, find company RSyn Ltd, and click **OK**.

CT000155 John Kondris - Contact Card

General Communication Segmentation Foreign Trade Commerce Portal

No. CT000155 Search Name JOHN KONDRIS

Type Person Phone No.

Company No. CT000155 Salesperson Code

Company Name RSyn Ltd Salutation Code UNISEX

Name John Kondris Last Date Modified 09-06-04

Address 17 Forest Street Date of Last Interaction

Address 2. Last Date Attempted

Post Code/City AU-2000 Sydney, NSW Next To-do Date

Country Code AU

Question Answer Que... Last Dst...

Contact Functions Create Interact Help

Integrating a To-do of Type Blank or Phone Call (CH 7)

1. On your Salesperson Card, click SALESPERSON→TO-DOS.
2. Click **Create To-do**.
3. Fill in the **Description** field, and set the type of the to-do to Phone Call.

AH Annette Hill - Create To-do

This wizard helps you to create to-dos.

What is the type of the to-do?
Phone Call

Describe your to-do.
Call Tech Dept Manager

☐ All Day Event

What is the start date of the to-do?
10-06-04

What is the duration of the to-do?
1 day

What is the end date of the to-do?
10-06-04 0:00:00

☐ Team to-do

< Back Next > Finish Cancel

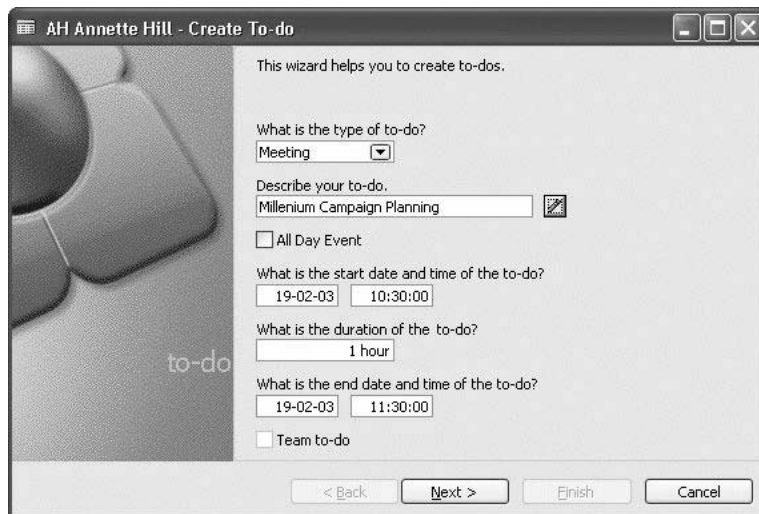
4. Click **Next** and **Finish**.
5. On the To-do Card, click **FUNCTIONS**→**SHOW OUTLOOK ITEM**, and click **Yes** on the confirmation message.

Integrating a Task (CH 7)

1. In Outlook, go to your Tasks folder, and click **NEW**→**TASK**.
2. Fill in the **Subject** field, and click **Save and Close**.
3. Go to Microsoft Navision and find the corresponding to-do in your to-do list. Alternatively, you can click the Microsoft Navision **To-do** button on the Outlook contact card if the appropriate toolbar is installed.

Integrating a To-do of Type Meeting (CH 7)

1. Click **SALES & MARKETING**→**SALES**→**SALESPeOPLE**.
2. On the Salesperson card, select Annette Hill, and then click **SALESPERSON**→**TO-DOS**.
3. In the To-do List window, click **Create To-do**. The Create To-do wizard appears.
4. Fill in the mandatory fields and any optional fields on the first page of the wizard with the relevant information. When you have completed the first page, it should look like this:



5. Fill in the mandatory fields and any optional fields on the second page of the wizard with the relevant information. Select a template with an attachment. Make sure that you have selected the **Send Invitation** check box for each attendee (this is only possible if the attendee has an e-mail address assigned). Select the **Send invitation(s) when I click Finish** check box.

When completed, it should look like this:

AH Annette Hill - Create To-do

If you want to invite attendees, you may now select them from contacts and salespeople.

Which template will you use for this e-mail invi... MEMO

Language Code

Attachment Yes

endan...	A...	Attendee...	Attendee Name	S...	S...
► do O...	S...	AH	Annette Hill		
required	C..	CT100140	David Hodgson		✓
required	C..	CT200136	Mindy Martin		✓
required	S..	DC	Debra L. Core		
required	S..	PS	Peter Sadow		

☒ Send invitation(s) when I click Finish.

< Back Next > Finish Cancel

6. When you have completed the Create To-do wizard, the to-do appears in your To-do List window.

AH Annette Hill - To-do List

Closed	Starting ...	T...	Description	P...	S...	No.	Date Clo...	Canceled	Comment	C.
✓	20-11-00		Verify quality of opportunity	H..	C..	TD100027	20-11-00			C
✓	27-11-00		Identify key persons	N..	C..	TD100028	27-11-00			C
	19-02-03	M..	Millenium Campaign Planning	N..	N..	TD000001				(M

Contact Name: _____ Contact Company Name: _____

To-do Functions Create To-do Help

7. Select this to-do, and click **FUNCTIONS**→**SHOW OUTLOOK ITEM**. The corresponding Outlook calendar item card appears.

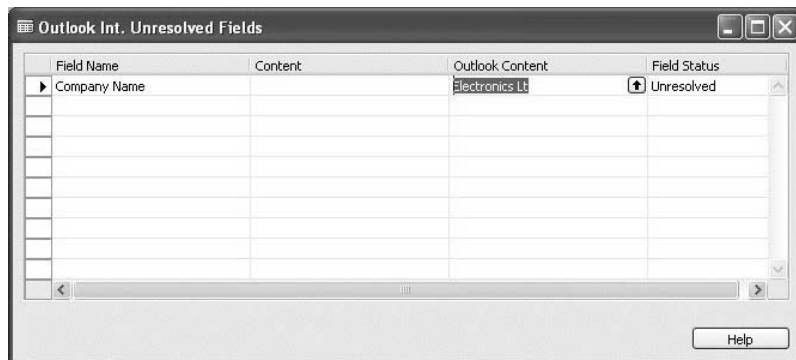
8. When the attendees reply to your meeting invitation, the responses will be recorded on the Attendee Scheduling card. To open the card, go to your To-do List, select the to-do, and click **TO-DO**→**ATTENDEE SCHEDULING**.

Integrating an Outlook appointment (CH 7)

1. Create the contact in your Outlook by going to the Contacts folder and clicking **NEW**→**CONTACT**.
2. Type Electronics Lt in the **Company** field.
3. The Outlook Integration Statistics window appears in Microsoft Navision. Click the **AssistButton** in the **No. of Conflicts** field to open the Conflict Resolution Worksheet. Select the conflict, and click **FUNCTIONS**→**SHOW UNRESOLVED FIELDS**.

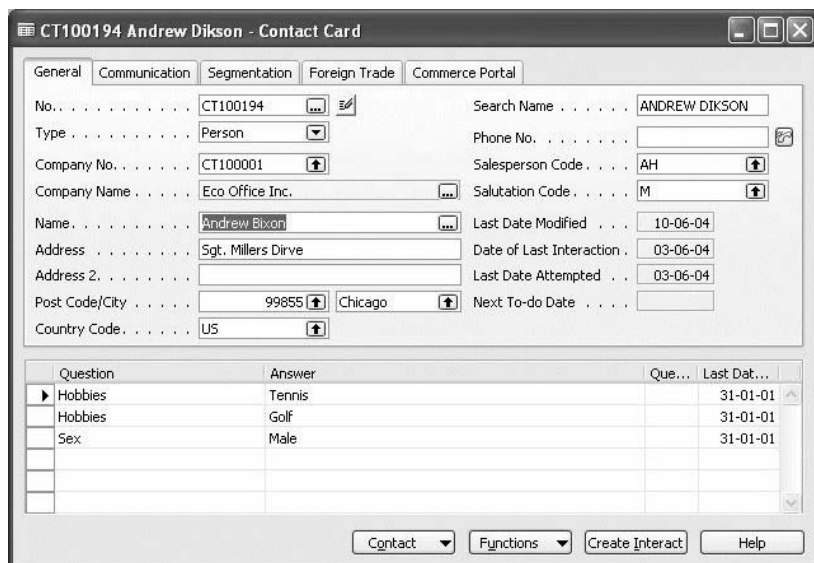
T..	Occurren...	Occurren...	Record No.	Record Description	Outlook Item Description	Action	R..	No. of C...
C..	20-05-04	15:49:32	TD000057	Meet the CEO	Meet the COO	Skip	T..	6
C..	09-06-04	17:44:25	CT100171	Candy Spoonkina	Candy Spoonkel	Skip	C..	4
C..	10-06-04	10:46:57	CT000162	John Miller	John Miller	Skip	C..	1

- Click the **AssistButton** in the Outlook Content field, select the appropriate company from the list, and click **OK**.



Resolving Version Conflicts (CH 7)

- Find the contact card for Andrew Dixon. Click **FUNCTIONS**→**SHOW OUTLOOK ITEM**, and click **Yes** on the confirmation message.
- Close Microsoft Navision, and wait for several seconds for the program processes to finish.
- Change the name of the contact to Andrew Dikson.
- Start Microsoft Navision, and click **No** on the message, “Do you want to synchronize with Outlook?”
- Find Andrew Dixon’s contact card, and change the name (for example to Andrew Bixon). Close the contact card.



6. Click **Yes** on the message that appears to open the Conflict Resolution Worksheet.
7. Click the **AssistButton** in the **Action** field, and click **Replace Outlook Item**.
8. Click **OK**.

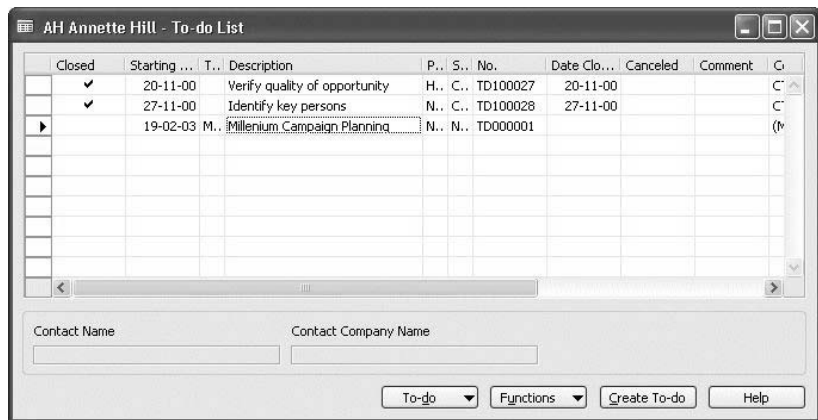
Synchronizing To-dos within a Specified Period (CH 7)

1. Click SALES & MARKETING→SALES→SALESPeOPLE.
2. On the salesperson card, select Annette Hill. On Annette Hill's salesperson card, go to the **Synchronization** tab. Select the Time Period in the **Synchronize To-dos** option field, then specify the synchronization period by entering the date formulas: -1W in the **Synchronize From** field and 1M in the **Synchronize To** field.

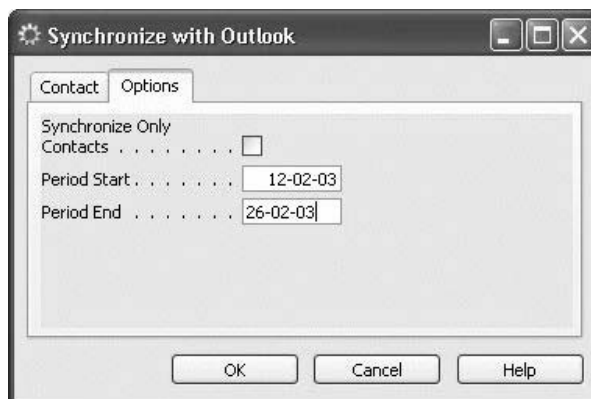
The screenshot shows a software window titled "AH Annette Hill - Salesperson/Purchaser Card". It has several tabs: General, Invoicing, Outlook Integration, Notification, and Synchronization. The Synchronization tab is active. Inside this tab, there is a section for "Synchronize To-dos" with a dropdown menu set to "Time Period". Below this, there are two input fields: "Synchronize From" with the value "-1W" and "Synchronize To" with the value "1M". At the bottom of the tab, there are three rows of statistics, each with a label and a value in a text box: "No. of Unsynchd. Cat..." with "0", "No. of Errors and War..." with "0", and "No. of Conflicts" with "0". At the very bottom of the window, there are four buttons: "Salesperson" (with a dropdown arrow), "Functions" (with a dropdown arrow), "Create Interact", and "Help".

3. On Annette Hill's salesperson card, click SALESPERSON→TO-DOS.

4. In the To-do List window, select the Millennium Campaign Planning meeting.



5. Open the selected To-do Card window by clicking TO-DO→CARD.
6. Edit this to-do and close the card.
7. In the To-do List window, click **Create To-do**. The Create To-do wizard appears. Create a to-do using the following information:
Type: Blank
Description: Identify key persons
Starting Date: Today (February 19, 2003)
Contact: CT000026 Lovaina Contractors.
8. On Annette Hill's salesperson card, click FUNCTIONS→SYNCHRONIZE WITH OUTLOOK. In the Synchronize with Outlook batch job window on the **Options** tab, you can make sure that the dates in the **Period Start** and **Period End** fields correspond to the period you have set on the **Synchronization** tab of Annette Hill's salesperson card.



9. Click **OK** to start the Synchronize with Outlook batch job.
10. In Outlook, make sure that one new to-do, Identify key persons, has appeared in your Outlook tasks folder, and no new items have appeared in your calendar folder.

Setting Up a Sales Cycle (CH 8)

The Sales Cycles and Sales Cycle Stages windows should look like this:

The screenshot shows the 'Sales Cycles' window. It contains a table with the following data:

Code	Description	Probability Calcul...	B..	C..
EX-LARGE	Existing customer - Large acc.	Multiply		
EX-SMALL	Existing customer - Small acc.	Add		
FIRSTLA...	First time - Large account	Multiply		
FIRSTSM...	First time - Small account	Add		
MEDIUM	Medium-sized	Chances of Succe...		

At the bottom right, there is a 'Sales Cycle' dropdown menu and a 'Help' button.

The screenshot shows the 'MEDIUM Medium-sized - Sales Cycle Stages' window. It contains a table with the following data:

Stage	Description	Comple...	Activity ...	Quote R...	Allow Skip	Date For...	C..
1	Initial	2	INIT		✓		
2	Company Presentation	20	C-PRES		✓		
3	Understanding Needs	45	NEEDS		✓		
4	Proposal	60	PROPOSAL	✓			
5	Presentation/Workshop	75	P-WORK	✓			
6	Sign Contract	95	SIGN	✓			

At the bottom right, there is a 'Sales Cy...' dropdown menu and a 'Help' button.

Activating Sales Stages (CH 8)

1. The contact card should look like this:

CT000152 The Bicycle Warehouse - Contact Card

General Communication Segmentation Foreign Trade Commerce Portal

No. CT000152 Search Name THE BICYCLE WA...

Type Company Phone No.

Company No. CT000152 Salesperson Code DC

Company Name The Bicycle Warehouse Salutation Code COMPANY

Name The Bicycle Warehouse Last Date Modified 25-01-01

Address 16 Cecil Street Date of Last Interaction

Address 2 Last Date Attempted

Post Code/City GB-WD1 6YG Watford Next To-do Date

Country Code

Question	Answer	Que...	Last Dat...

Contact Functions Create Interact Help

2. The Opportunity List window should include the new opportunity:

DC Debra L. Core - Opportunity List

No.	C..	Creation...	Description	Contact ...	Salesper...	S..	Current ...	Campaig...	Camp...
OP000007		25-01-01	Interested in Millenium Series	CT000152	DC	N..	1	CP1002	Event
OP100024		13-12-00	Table lightning	CT200079	DC	I...	1	CP1002	Event
OP100025		23-01-01	Guest chairs for the reception	CT000004	DC	I...	1	CP1002	Event
OP100026		25-11-00	Storage system	CT000005	DC	I...	1	CP1002	Event
OP100030		11-11-00	10 to 15 Whiteboards	CT100215	DC	I...	2	CP1002	Event
OP100032		07-01-01	Desk and chair for the manager	CT000025	DC	I...	1	CP1002	Event
OP100034		12-12-00	Need a Mobile Pedestal	CT100230	DC	I...	1	CP1002	Event
OP100035		22-12-00	2 Guest chairs, blue	CT100230	DC	I...	1	CP1002	Event
OP100046		06-11-00	New lamps in the reception	CT000007	DC	I...	1	CP1002	Event
OP100049		02-12-00	Storage units or shelves	CT100226	DC	I...	1	CP1002	Event

Contact Name Contact Company Name

The Bicycle Warehouse The Bicycle Warehouse

Opportunity Functions Create Oppo... Help

- When you have completed steps 3 and 4, the Statistics window for the opportunity should look something like this:

OP000007 Interested in Millenium Series ...

General

Current Sales Cycle St... 3

Estimated Value (LCY) . . 150,000.00

Chances of Success % . . 65

Completed % 45

Probability % 65.0

Calcd. Current Value (... 97,500.00

Help

Viewing Lost Opportunities (CH 8)

- The Sales Quote window should look like this:

1004 The Bicycle Warehouse - Sales Quote

General Invoicing Shipping Foreign Trade E - Commerce

No. 1004

Sell-to Customer No. . . VIRTUAL

Sell-to Contact No. . . CT000152

Sell-to Customer Temp...

Sell-to Customer Name . . The Bicycle Warehouse

Sell-to Address 16 Cecil Street

Sell-to Address 2

Sell-to Post Code/City . . GB-WD1 6YG Watford

Sell-to Contact

No. of Archived Versions. 0

Order Date 25-01-01

Document Date 25-01-01

Requested Delivery Date

Salesperson Code DC

Campaign No.

Responsibility Center . .

Status Open

T... No.	Description	Location ...	Quantity	Unit of M...	Unit Pric...	Line Amount
I...	1000 Bicycle		25	PCS	4,000.00	100,000.
I...	1001 Touring Bicycle		20	PCS	4,000.00	80,000.

Quote Line Functions Make Order Print... Help

2. The Statistics window for the contact should look like this:

The screenshot shows a window titled 'CT000152 The Bicycle Warehouse - Cont...'. It has two tabs: 'General' and 'Opportunities'. The 'Opportunities' tab is active. It contains three data fields: 'No. of Opportunities' with a value of 1, 'Estimated Value (LCY)' with a value of 150,000.00, and 'Calcd. Current Value (...)' with a value of 97,500.00. A 'Help' button is located at the bottom right.

3. When you have created the contact as a customer and closed the opportunity, the order should look something like this:

The screenshot shows a window titled '1002 The Bicycle Warehouse - Sales Order'. It has five tabs: 'General', 'Invoicing', 'Shipping', 'Foreign Trade', and 'E - Commerce'. The 'General' tab is active. It contains various data fields for a sales order, including 'No.' (1002), 'Posting Date' (25-01-01), 'Order Date' (25-01-01), 'Document Date' (25-01-01), 'Requested Delivery Date', 'Promised Delivery Date', 'External Document No.', 'Salesperson Code' (DC), 'Campaign No.', 'Responsibility Center', and 'Status' (Open). Below these fields is a table with columns: 'T.. No.', 'Description', 'Location ...', 'Quantity', 'Reserve...', 'Unit of M...', and 'Unit Pric...'. The table contains two rows: '1000 Bicycle' with a quantity of 25 and '1001 Touring Bicycle' with a quantity of 20. At the bottom, there are buttons for 'Order', 'Line', 'Functions', 'Posting', 'Print...', and 'Help'.

T.. No.	Description	Location ...	Quantity	Reserve...	Unit of M...	Unit Pric...
1000	Bicycle		25		PCS	4,000.00
1001	Touring Bicycle		20		PCS	4,000.00

4. In the Opportunities window, the **General** tab should look like this:

No of Opportunities - Opportunities

General Filters

Show as Lines Salesperson

Show No of Opport...

Rounding Factor None

No.	Name	Sep 2000	Oct 2000	Nov 2000	Dec 2000	Jan 2001
BD	Bart Duncan			3	1	1
DC	Debra L. Core			1	3	2
JR	John Roberts			1	1	2

1 7 31 3 12

Help

5. In the Opportunities window, the **Filters** tab should look like this:

No of Opportunities - Opportunities

General Filters

Status Filter Lost

Close Opportunity Filter

Chances of Success %

Probability % Filter

Completed % Filter

Estimated Value Filter

Calcd. Current Value F

Sales Cycle Filter

Sales Cycle Stage Filter

No.	Name	Sep 2000	Oct 2000	Nov 2000	Dec 2000	Jan 2001
JR	John Roberts					1

1 7 31 3 12

Help

Adding Contacts to a Segment (CH 9)

To add the contacts to the segment, fill in the third window of the wizard like this:

SM10001 Increase sale - Segment Wizard

Select the criteria to define which contacts you want to make up your segment.

Profile Questionnaire Code
COMPANY

< Back Next > Finish Cancel

Fill in the fourth window of the wizard like this:

SM10001 Increase sale - Segment Wizard

Choose Profile Questn. Lines

Select	Description
<input type="checkbox"/>	No. of employees
<input type="checkbox"/>	1..99
<input type="checkbox"/>	100..499
<input type="checkbox"/>	500..999
<input checked="" type="checkbox"/>	1000+
<input type="checkbox"/>	Company Ownership
<input type="checkbox"/>	Stockexchange
<input type="checkbox"/>	Family
<input type="checkbox"/>	Foundation
<input type="checkbox"/>	Government
<input type="checkbox"/>	Institution
<input type="checkbox"/>	Additional Business Relations
<input type="checkbox"/>	Partner
<input type="checkbox"/>	Competitor

< Back Next > Finish Cancel

Setting Up a Questionnaire (CH 9)

1. When you have set up the new questionnaire, the Profile Questionnaire Setup window should look like this:

The screenshot shows the 'Profile Questionnaire Setup' window. It contains a table with the following data:

T...	Description	Multiple ...	Priority	Auto Co...	From Value	To Value	No. of C...
Q...	Purchases (LCY), Current Year			✓			
A..	Top 20% of Purchases		Normal				20
A..	Bottom 20% of Purchases		Normal		80		
Q...	Discount %			✓			
A..	Under 2%		Normal				2
A..	Over 5%		Normal		5		

At the bottom of the window, there are buttons for 'Line', 'Functions', and 'Help'.

The Profile Question Details windows for the first two questions should look like these:

The screenshot shows the 'Purchases (LCY), Current Year - Profile Q...' window. It has two tabs: 'General' and 'Classification'. The 'Classification' tab is active, showing the following settings:

- Auto Contact Classific...: ☒
- Customer Class. Field: [Dropdown]
- Vendor Class. Field: Purchase (LCY) [Dropdown]
- Contact Class. Field: [Dropdown]
- Min. % Questions ...: [Text Box]
- Starting Date Formula: CY-1Y+1D
- Ending Date Formula: CD
- Classification Method: Percentage o... [Dropdown]
- Sorting Method: Descending [Dropdown]
- No. of Decimals: 0

There is an 'Answer Points' button and a 'Help' button at the bottom right.

Discount % - Profile Question Details

General Classification

Auto Contact Classific... ☒

Customer Class. Field . . . [Dropdown]

Vendor Class. Field . . . Discount (%) [Dropdown]

Contact Class. Field . . . [Dropdown] Answer Points

Min. % Questions ... [Text Box]

Starting Date Formula . . . CY-2Y+1D

Ending Date Formula . . . CD

Classification Method . . . Defined Value [Dropdown]

Sorting Method . . . [Dropdown]

No. of Decimals 0

Help

2. If you have not selected the **Auto Contact Classification** check box, you can manually select the right answers for the contact in the Contact Profile Answers window.

CT000065 AR Day Property Managem...

Profile Questionnaire C... VEND... [Up Arrow]

T..	Description	Set
Q...	Purchases (LCY), Current Year	
A..	Top 20% of Purchases	<input type="checkbox"/>
A..	Bottom 20% of Purchases	
Q...	Discount %	
A..	Under 2%	
A..	Over 5%	

Help

If the **Auto Contact Classification** option has been selected, the fields in this window will be disabled, and no questions or answers for this profile will be displayed.

- The Profile Questionnaire Setup window should look like this:

T...	Description	Multiple...	Priority	Auto Co...	From Value	To Value	No. of C...
Q...	Purchases (LCY), Current Year			✓			
A..	Top 20% of Purchases		Normal				107
A..	Bottom 20% of Purchases		Normal		80		2
Q...	Discount %			✓			
A..	Under 2%		Normal				109
A..	Over 5%		Normal		5		

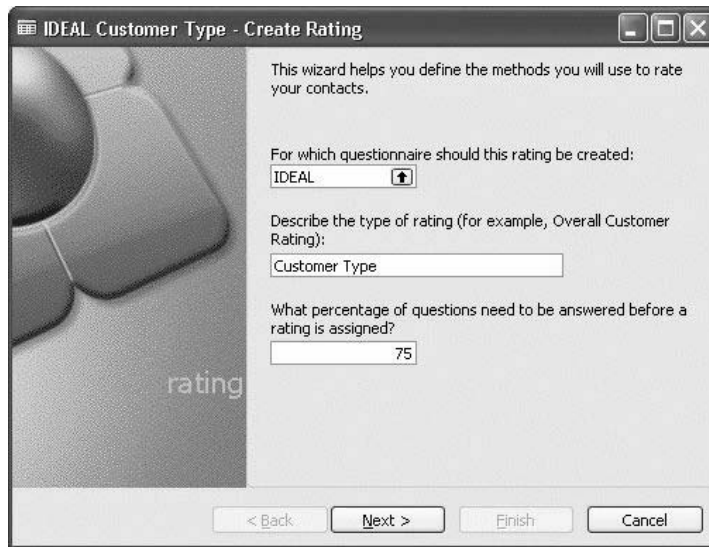
- The test report should look like this in the Print Preview window:

Line No.	Type	Description
10000	Question	Purchases (LCY), Current Year
20000	Answer	Top 20 % of Purchases
30000	Answer	Bottom 20 % of Purchases
40000	Question	Discount %
50000	Answer	Under 2 %
60000	Answer	Over 5 %

Rating Your Contacts (CH 9)

- Use the Create Rating wizard to do the rating for you. In the Profile Questionnaire window, click Functions, Create Rating.

2. Fill in the first page of the wizard as follows:

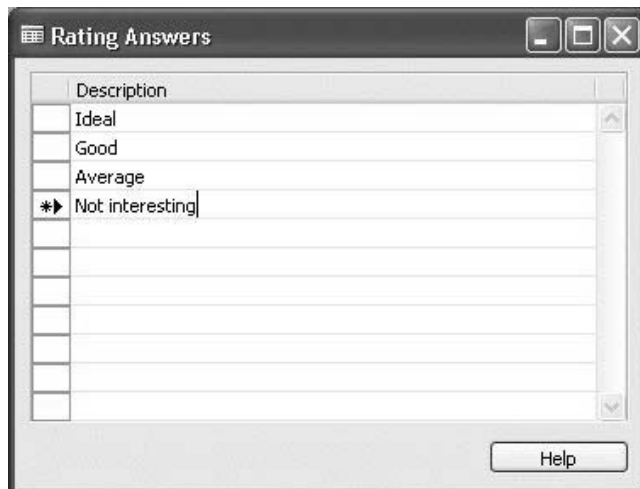


The screenshot shows the 'IDEAL Customer Type - Create Rating' wizard. The window title is 'IDEAL Customer Type - Create Rating'. The main text says: 'This wizard helps you define the methods you will use to rate your contacts.' Below this, there are three sections:

- 'For which questionnaire should this rating be created:' with a dropdown menu showing 'IDEAL' and an up arrow button.
- 'Describe the type of rating (for example, Overall Customer Rating):' with a text input field containing 'Customer Type'.
- 'What percentage of questions need to be answered before a rating is assigned?' with a text input field containing '75'.

At the bottom, there are four buttons: '< Back', 'Next >', 'Finish', and 'Cancel'.

3. On the second page, select Custom. The Rating Answers window appears. Fill it in as follows:



The screenshot shows the 'Rating Answers' window. The window title is 'Rating Answers'. It contains a list of descriptions with checkboxes:

Description
<input type="checkbox"/> Ideal
<input type="checkbox"/> Good
<input type="checkbox"/> Average
<input checked="" type="checkbox"/> *► Not interesting
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>

At the bottom right, there is a 'Help' button.

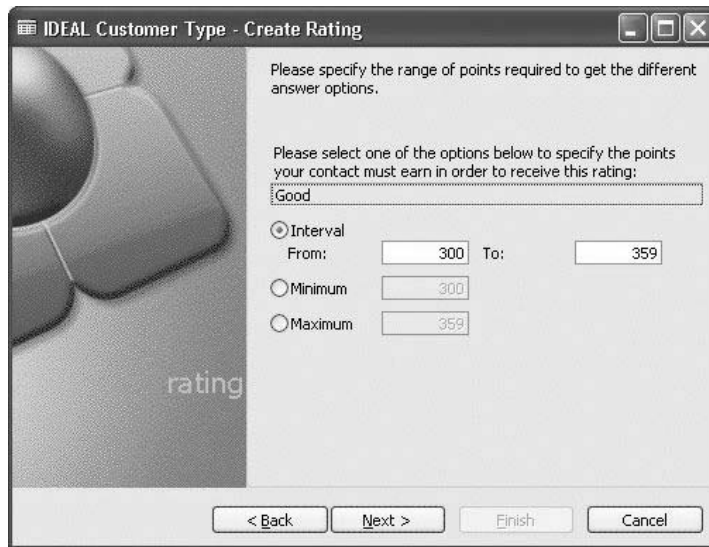
After you close the Rating Answers window, the second page of the wizard should look like this:

The screenshot shows the 'IDEAL Customer Type - Create Rating' window. The title bar includes standard Windows window controls. The main area has a background image of a computer keyboard with the word 'rating' overlaid. The text 'Specify which of the following grouping methods you will use to rate your contacts:' is at the top. Below it are three radio buttons: 'High and Low', 'A, B and C', and 'Custom'. The 'Custom' option is selected. To the right of 'Custom' is a text box labeled 'Number of possible answers:' containing the number '4' and a dropdown arrow. At the bottom are four buttons: '< Back', 'Next >', 'Finish', and 'Cancel'.

4. In your points system, the maximum number of points a prospect can score is 400, but you want the program to return ideal prospects that have scored from 360 points and above. Therefore, the next page of the wizard should look like this:

The screenshot shows the next step of the 'IDEAL Customer Type - Create Rating' wizard. The title bar and background are the same. The text 'Please specify the range of points required to get the different answer options.' is at the top. Below it is a text box containing the word 'Ideal'. Underneath is the instruction 'Please select one of the options below to specify the points your contact must earn in order to receive this rating:'. There are three radio buttons: 'Interval', 'Minimum', and 'Maximum'. The 'Minimum' option is selected. To the right of 'Minimum' is a text box containing the number '360'. To the right of 'Interval' are two text boxes, one labeled 'From:' containing '360' and one labeled 'To:' which is empty. To the right of 'Maximum' is an empty text box. At the bottom are the same four buttons: '< Back', 'Next >', 'Finish', and 'Cancel'.

5. On the following three pages, fill in the points as shown:



IDEAL Customer Type - Create Rating

Please specify the range of points required to get the different answer options.

Please select one of the options below to specify the points your contact must earn in order to receive this rating:

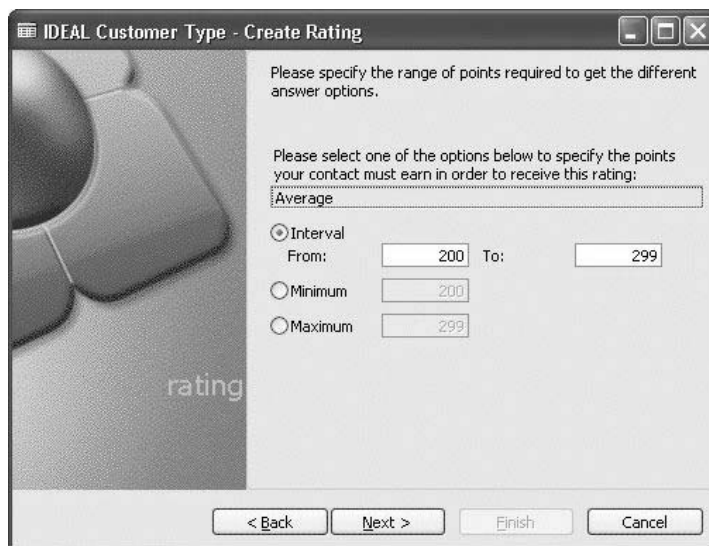
Good

☒ Interval
From: 300 To: 359

☐ Minimum 300

☐ Maximum 359

< Back Next > Finish Cancel



IDEAL Customer Type - Create Rating

Please specify the range of points required to get the different answer options.

Please select one of the options below to specify the points your contact must earn in order to receive this rating:

Average

☒ Interval
From: 200 To: 299

☐ Minimum 200

☐ Maximum 299

< Back Next > Finish Cancel

IDEAL Customer Type - Create Rating

Please specify the range of points required to get the different answer options.

Please select one of the options below to specify the points your contact must earn in order to receive this rating:

Not interesting

☐ Interval
From: To: 199

☐ Minimum

☒ Maximum 199

< Back Next > Finish Cancel

6. On the last page, you get an overview of the listed points in the four categories. It should look like this:

IDEAL Customer Type - Create Rating

When you click Finish, the questions and answers you have created will be saved and the Answer Points window will appear. In this window, you can assign points to each answer.

Description	From	To
► Customer Type		
Ideal	360	
Good	300	359
Average	200	299
Not interesting		199

< Back Next > Finish Cancel

If you have made any mistakes, you can click **Back**, and make your corrections on the relevant page.

- Click **Finish** to complete the rating. The Answer Points window opens, and you can now enter in the **Points** field the points you want to assign each answer.

T...	Description	No. of C...	Points
Q... IT Budget			
A..	> 100.000 (LCY)		100
A..	50.000...99.999		80
A..	20.000...49.000		40
A..	0...19.999		20
Q... No. of Employees			
A..	> 100		100
A..	50...99		80
A..	20...49		40
A..	1...19		20
Q... Preferred Platform			
A..	Linux		100
A..	Win based		100
A..	OS/400		20
A..	UNIX		50
A..	Other		
Q... Preferred Database			
A..	DB2		50
A..	MS SQL		100
A..	Oracle		100
A..	Other		

Points Help

- If you want an overview of the distribution of total points on different answers, click Points and then List to open the Answer Points List window:

Rating Pr...	Question	Answer	Points
IDEAL	IT Budget	> 100.000 (LCY)	100
IDEAL	IT Budget	50.000...99.999	80
IDEAL	IT Budget	20.000...49.000	40
IDEAL	IT Budget	0...19.999	20
IDEAL	No. of Employees	> 100	100
IDEAL	No. of Employees	50...99	80
IDEAL	No. of Employees	20...49	40
IDEAL	No. of Employees	1...19	20
IDEAL	Preferred Platform	Linux	100
IDEAL	Preferred Platform	Win based	100
IDEAL	Preferred Platform	OS/400	20
IDEAL	Preferred Platform	UNIX	50
IDEAL	Preferred Database	DB2	50
IDEAL	Preferred Database	MS SQL	100
IDEAL	Preferred Database	Oracle	100

OK Cancel Help

9. The rating question (Customer Type) is now added to the profile questionnaire with the **From Value** and **To Value** fields filled out. Since you are only interested in having the Customer Type answers displayed on the contact card, you select Very Low (Hidden) in the **Priority** fields for the other answers.

The screenshot shows the 'Profile Questionnaire Setup' window. The 'Profile Questionnaire C...' dropdown is set to 'IDEAL'. The table below lists the questions and their configurations:

T...	Description	Multiple ...	Priority	Auto Co...	From Value	To Value	No. of C...
Q...	IT Budget						
A..	> 100,000 (LCY)		Very Low (Hidden)				1
A..	50,000...99,999		Very Low (Hidden)				
A..	20,000...49,000		Very Low (Hidden)				
A..	0...19,999		Very Low (Hidden)				
Q...	No. of Employees						
A..	> 100		Very Low (Hidden)				1
A..	50...99		Very Low (Hidden)				
A..	20...49		Very Low (Hidden)				
A..	1...19		Very Low (Hidden)				
Q...	Preferred Platform						
A..	Linux		Very Low (Hidden)				1
A..	Win based		Very Low (Hidden)				
A..	OS/400		Very Low (Hidden)				
A..	UNIX		Very Low (Hidden)				
A..	Other		Very Low (Hidden)				
Q...	Preferred Database						
A..	DB2		Very Low (Hidden)				1
A..	MS SQL		Very Low (Hidden)				
A..	Oracle		Very Low (Hidden)				
A..	Other		Very Low (Hidden)				
Q...	Customer Type			✓			
A..	Ideal		Normal		360		1
A..	Good		Normal		300	359	
A..	Average		Normal		200	299	
A..	Not interesting		Normal			199	

Buttons at the bottom: Line, Functions, Help.

Creating Salutation Formulas (CH 10)

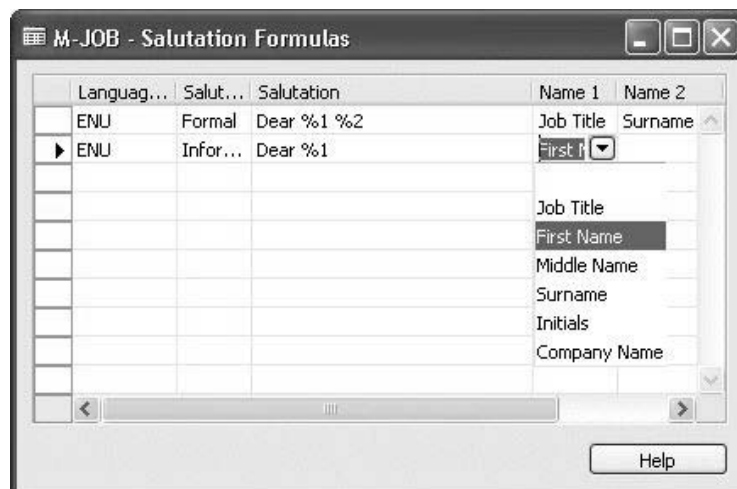
After the Male – Job title salutation has been selected, the Salutations window should look like this:

The screenshot shows the 'Salutations' window with a list of salutations. The 'M-JOB' salutation is selected.

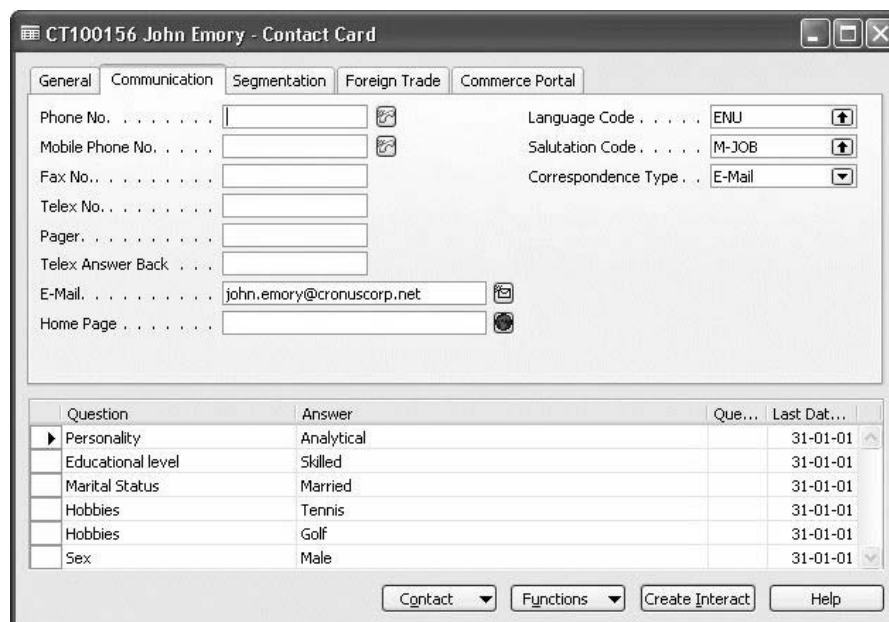
Code	Description
COMPANY	Company
F	Female Married or Unmarried
F-JOB	Female - Job title
F-MAR	Female - Married
F-UMAR	Female - Unmarried
M	Male Married or Unmarried
M-JOB	Male - Job title
UNISEX	Unisex

Buttons at the bottom: Salutation, Help.

After you have set up formal and informal salutations, the Salutation Formulas window should look like this:



When you have assigned the Salutation code to the Contact Card, it should look like this:



Creating Interaction Using a Segment (CH 10)

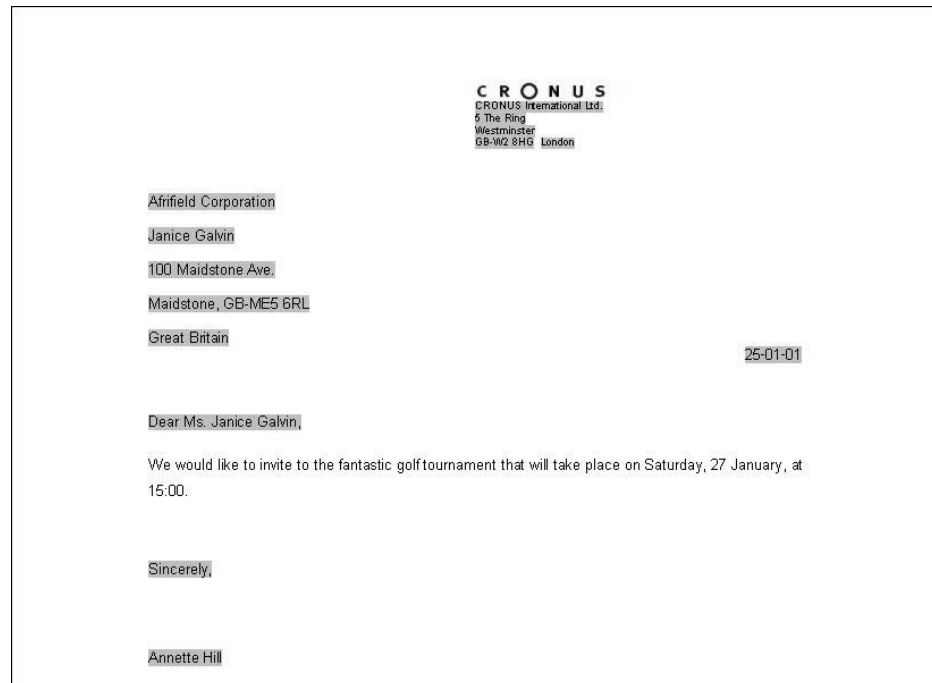
When you have created the segment, the Segment window should look like this:

Contact	C.	Contact Company Name	Contact Name	Description
CT100202	E..	Afrifield Corporation	Janice Galvin	Golf Weekend
CT000025	E..	Antarctcopy		Golf Weekend
CT000062	E..	Autohaus Mielberg KG		Golf Weekend
CT000061	E..	Beef House		Golf Weekend
CT100189	E..	Bilabankinn	Ragnar Eiriksson	Golf Weekend

When you have filled in the subject, the Segment Interaction Languages window should look like this:

Language	Description	Subject	Attachment
DAN		Fantastic Golf Event	Inherited
DAN		Fantastisk Golf Weekend	Inherited

The Word document could look like this:



Setting Up Customer Templates (CH 11)



If you have set up the customer templates from “Integrating a To-do of Type Blank or Phone Call (CH 7)” correctly, you will see a window similar to this.

Creating a Sales Quote and a Sales Order (CH 11)

1002 Kinnareds Träindustri AB - Sales Quote

General Invoicing Shipping Foreign Trade E - Commerce

No. 1002 ...

Order Date 24-02-01

Sell-to Customer No.

Document Date 25-01-01

Sell-to Contact No. CT000117

Requested Delivery Date

Sell-to Customer Temp... PLATINUM

Salesperson Code

Sell-to Customer Name . Kinnareds Träindustri AB

Campaign No.

Sell-to Address Stordal Torslunda

Opportunity No.

Sell-to Address 2

Responsibility Center

Sell-to Post Code/City . . SE-521 03 Kinnared

Status Open

Sell-to Contact

No. of Archived Versions. 0

T..	No.	Description	Location ...	Quantity	Unit of M...	Unit Pric...	Line Amount
I...	1908-S	LONDON Swivel Chair, blue	BLUE	10	PCS	1,245.895	12,458.95

Quote Line Functions Make Order Print... Help

This window shows the sales quote using the correct customer template. Click **Print** to print the sales quote.

In order to make an order from the above quote, click **Make Order**. You are prompted by the program to specify a customer on the quote. Click **Yes**, if prompted, and the contact is changed to customer, and the order is made.

1001 Kinnareds Träindustri AB - Sales Order

General Invoicing Shipping Foreign Trade E - Commerce

No. 1001 ...

Posting Date 24-02-01

Sell-to Customer No. C00010

Order Date 24-02-01

Sell-to Contact No. CT000117

Document Date 24-02-01

Sell-to Customer Name . Kinnareds Träindustri AB

Requested Delivery Date

Sell-to Address Stordal Torslunda

Promised Delivery Date

Sell-to Address 2

External Document No.

Sell-to Post Code/City . . SE-521 03 Kinnared

Salesperson Code

Sell-to Contact

Campaign No.

Responsibility Center

Status Open

No. of Archived Versions. 0

T..	No.	Description	Location ...	Quantity	Reserve...	Unit of M...	Unit Pric...
I...	1908-S	LONDON Swivel Chair, blue	BLUE	10		PCS	1,245.895

Order Line Functions Posting Print... Help

Issuing a Quote to Contract (CH 12)

The screenshot shows the '1003 Ergonomic Office Systems - Sales Quote' window. The 'General' tab is active. The 'No.' field is 1003. The 'Order Date' and 'Document Date' are both 25-01-01. The 'Requested Delivery Date' is empty. The 'Salesperson Code', 'Campaign No.', and 'Responsibility Center' are empty. The 'Status' is 'Open'. The 'No. of Archived Versions' is 0. The table below shows one line item:

No.	Description	Location ...	Quantity	Unit of M...	Unit Pric...	Line Amount ...
766BC-B	OLYMPIC Office System	BLUE	4	PCS	2,755.138	11,020.55

Buttons at the bottom: Quote, Line, Functions, Make Order, Print..., Help.

A sales quote has been created.

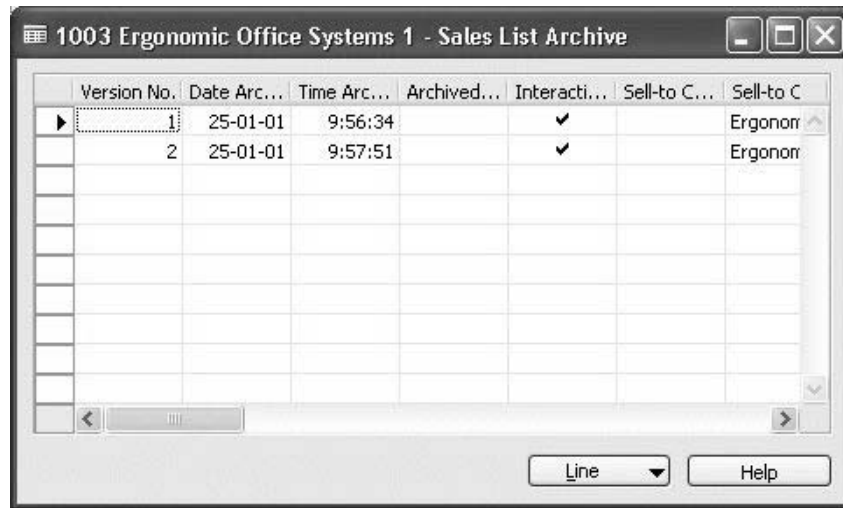
Restoring the Quote (CH 12)

The screenshot shows the '1003 Ergonomic Office Systems - Sales Quote' window. The 'General' tab is active. The 'No.' field is 1003. The 'Order Date' and 'Document Date' are both 25-01-01. The 'Requested Delivery Date' is empty. The 'Salesperson Code', 'Campaign No.', and 'Responsibility Center' are empty. The 'Status' is 'Open'. The 'No. of Archived Versions' is 2. The table below shows two line items:

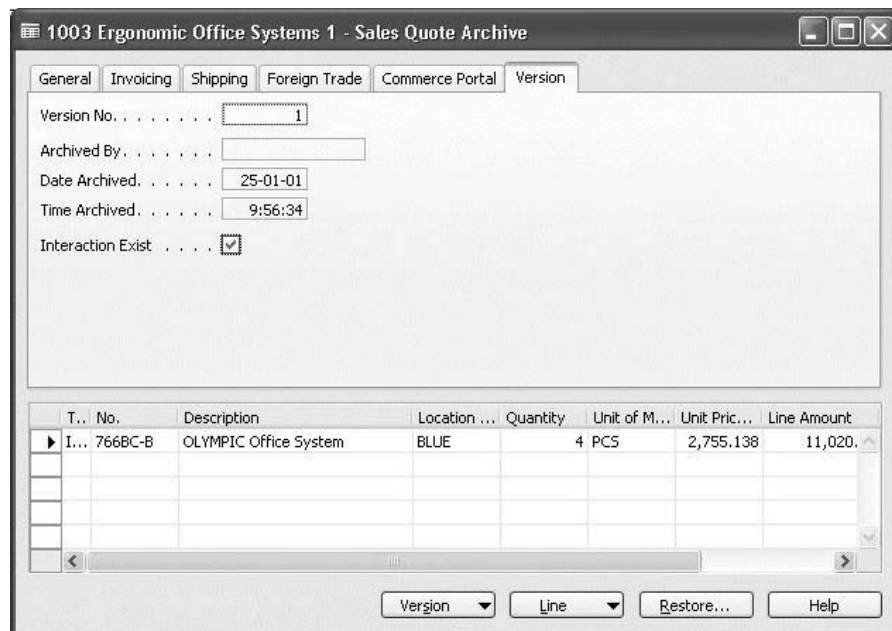
No.	Description	Location ...	Quantity	Unit of M...	Unit Pric...	Line Amount ...
766BC-B	OLYMPIC Office System	BLUE	4	PCS	2,755.138	11,020.55
766BC-B	OLYMPIC Office System	BLUE	2	PCS	2,755.138	5,510.28

Buttons at the bottom: Quote, Line, Functions, Make Order, Print..., Help.

The sales quote has been changed.



The Sales List Archive window contains two sales quotes.



The first sales quote has been restored.

1002 Ergonomic Office Systems - Sales Order

General Invoicing Shipping Foreign Trade E - Commerce

No. 1002 Posting Date 16-02-01

Sell-to Customer No. . . . C00020 Order Date 25-01-01

Sell-to Contact No. . . . CT100004 Document Date 25-01-01

Sell-to Customer Name . . Ergonomic Office Systems Requested Delivery Date

Sell-to Address 25 Kingston St Promised Delivery Date

Sell-to Address 2 External Document No.

Sell-to Post Code/City . . US-IL 61236 Chicago Salesperson Code

Sell-to Contact Campaign No.

No. of Archived Versions. . 0 Responsibility Center

Status Open

T... No.	Description	Location ...	Quantity	Reserve...	Unit of M...	Unit Pric...
I... 766BC-B	OLYMPIC Office System		4		PCS	2,755.138

Order Line Functions Posting Print... Help

A sales order has been created on the basis of the restored sales quote.