CHAPTER 2: SETUP PROCEDURES

Objectives

The objectives for this chapter are:

- Prepare Role Center for Relationship Management.
- Discuss the Marketing Setup window.
- Set up interactions for automatic recording.
- Set up synchronization of contacts with customers, vendors, and bank accounts.
- Review the consequences of synchronization.
- Set up and perform a search for contact duplicates.
Chapter 2: Setup Procedures

Introduction

Before being able to work with activities, opportunities, interactions, and so on, it is necessary to set up Microsoft Dynamics® NAV Relationship Management.

This chapter provides you with information about how to set up the Relationship Management functionality to meet your business needs in the best possible way.

Setting Up the Role Center

In Microsoft Dynamics NAV, the RoleTailored client comes with preconfigured Role Centers to fit many of the fundamental roles in companies. When you set a certain Role Center as default, you will start from a single navigational window that displays information pertinent to your role in the company. From the Role Center, you can navigate to additional information and open separate windows for performing tasks and viewing data. The Role Center is customizable so that you can add to the starting page the links to the program entities that you use most often.

For Relationship Management, the Sales Manager profile is recommended for working at. Its starting page contains direct links to the documents and reports the CRM managers and other employees tend to work with.

To be able to use the Sales Manager profile, set it up as default:

1. In the navigation pane, click Departments > Administration > Application Setup > RoleTailored Client > Profiles.
2. Open the card for the Sales Manager profile.
3. Select the Default Role Center check box and click OK.
4. Restart Microsoft Dynamics NAV.
Marketing Setup Window

Most of the setup options for the Relationship Management functionality can be adjusted in the Marketing Setup window. In this window, you can decide in what way you want the program to manage certain characteristics of your contacts, for example, default values and number series.

To open the Marketing Setup window, click Departments > Administration > Application Setup > Sales & Marketing > Marketing and under Tasks, click Marketing Setup.

The Marketing Setup window contains eight FastTabs:

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

General FastTab

The General FastTab includes three fields:

- Attachment Storage Type
- Attachment Storage Location
- Index Mode

The following sub-topics describe these fields and values that can be specified.

Attachment Storage

All the documents that you send to your contacts, in addition to the documents that you receive from your contacts, can be stored within Microsoft Dynamics NAV. For example, you can store letters, price lists, product information, and so on. You can link these documents as attachments to interaction templates, which are used when creating interactions, such as, sending a letter to a contact (for more information about creating interactions, refer to the “Interactions and Document Management” chapter).

Before you can start working with attachments, you must specify the place where they will be stored. You do this on the General FastTab of the Marketing Setup window.
In the Attachment Storage Type field, you can choose where you want the program to store the attachments:

- To store attachments within Microsoft Dynamics NAV, select the Embedded option.
- To store attachments on a disk, select Disk File. Having selected this option, you need to specify the drive and path to the location where the attachments are stored.

![Figure 2.2: The General FastTab of the Marketing Setup Window](image)

**FIGURE 2.2 THE GENERAL FASTTAB OF THE MARKETING SETUP WINDOW**

**NOTE:** Storage related options are available in the Classic client of Microsoft Dynamics NAV 2009.

To facilitate the access to attachments, it is recommended that you store the attachments within Microsoft Dynamics NAV. However, if you decide to store them as a file on a disk, ensure that all users of the Sales & Marketing application area have access to that file.

**Index Mode**

The contact search index can be generated manually or automatically. To indicate the way you want it to be generated, in the Index Mode field, select among the two options: Auto or Manual.

<table>
<thead>
<tr>
<th>Index Mode Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Auto</td>
<td>If this option is selected, each time you add or modify any information about a contact (for example, if you change the description of an interaction or a contact address) the program will automatically use new information in these fields in a future search.</td>
</tr>
<tr>
<td>Manual</td>
<td>If this option is selected, you will need to run the</td>
</tr>
</tbody>
</table>
**Generate Search Index** request form for the program to use the new or modified information in future search.

**Inheritance FastTab**

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

You can have the program copy the following information:

- The salesperson code
- The territory code
- The country/region code
- The language code
- Address details, such as information from the Address, Address 2, City, Post Code, and Country fields
- Communication details, such as the fax, telex, and phone number

You can specify, which information of the mentioned above must be copied by selecting an appropriate check box on the Inheritance FastTab of the Marketing Setup window.
For example, if you want the program to automatically copy the salesperson code from a contact company card to a contact person card for a person working for this company, select the **Salesperson Code** check box on the **Inheritance** FastTab.

When you modify one or more of these fields on the contact company card while the corresponding check boxes are selected on the **Inheritance** FastTab, 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 FastTab**

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

![Defaults FastTab](image)

**FIGURE 2.4 ADJUSTING DEFAULT SETTINGS**

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

**NOTE**: The inheritance of fields overrides the default values you have set up. This means that 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.
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**Default Salutation Codes**

You can set up a default salutation code to be used automatically by the program for your contact companies and your contact persons. To specify a default company or person salutation code, on the **Defaults** FastTab of the **Marketing Setup** window, click the AssistButton next to the **Company Salutation Code** field or **Person Salutation Code** field and select a code from the **Salutations** window. If you need, you can create a new salutation code (for more information about salutations, refer to the “Multilanguage Salutation and Attachment” chapter).

**Default Sales Cycle Code**

The program can record all the sales opportunities you have with your contacts (for more information about creating and working with opportunities, refer to the “Opportunity Management” chapter). 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** FastTab by selecting a sales cycle code in the **Sales Cycle Code** field.

**Default To-Do Date Calculation**

The **To-do Date Calculation** field is used during synchronization with Microsoft® Office Outlook®. If during the work with a Microsoft Office Outlook task you have not entered any due date, Microsoft Dynamics NAV will use the current date. An Outlook task can be synchronized with a Microsoft Dynamics NAV to-do. Thus, if you want the program to calculate a due date for this task, 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. For more information about Outlook Synchronization, refer to the “Outlook Synchronization” chapter.

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**NOTE:** The current version of the program does not use this field.

**Numbering FastTab**

On the **Numbering** FastTab of the **Marketing Setup** window, you can set up number series for contacts, campaigns, segments, to-dos, and opportunities.
Number series are used to have the program automatically assign the next available number when you create a new contact, campaign, segment, to-do, or opportunity.

If you have set up number series, for example, for contacts, then when you are creating a new contact card, the program automatically enters the next available contact number.

Lab 2.1 – Set Up Salutation for a Contact

In this lab, you will practice setting up a default salutation code to be used for contact persons.

Scenario

You are a sales manager. You find it necessary to assign a default salutation to be used for your contact persons. You know that your contacts will be men.

Challenge Yourself

Assign the M default salutation code.

Step by Step

1. In the navigation pane, click Departments > Administration > Application Setup > Sales & Marketing > Marketing > Marketing Setup.
2. In the Marketing Setup window, go to the Defaults FastTab.
3. Click the AssistButton next to Person Salutation Code field and from the Salutations list, select the M salutation code for Male Married or Unmarried.
4. In the Marketing Setup window, click OK.
Setting Up Automatically Recorded Interactions

The Sales & Marketing application area makes it possible to record all the interactions you have with your contacts, such as, meetings, phone calls, e-mail messages, printing sales and purchase orders, and so on. The program records interactions if an interaction template code is specified for each of your activities.

Sales, Purchase, and Service Documents

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

You can have the program automatically create an interaction when you take one of the following actions 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 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.

**NOTE:** The current version of Microsoft Dynamics NAV does not create an interaction log entry as a service order is posted.

The program does not allow opening a service order from log entry that had been created during creation of the order if this order was already posted.

For the program to automatically create interactions when you perform one of the actions listed above, the following conditions must be fulfilled:

- Interaction template codes for sales, purchase, and service documents must be set up. This assigns the interaction templates to sales, purchase, and service documents making the program create interactions automatically each time a specific action on the documents is performed.
- Synchronization between contacts and corresponding customers, vendors, and bank accounts must be set up. This enables linking...
contacts with customers, vendors, and bank accounts. Linking makes it possible to create log entries for operations with documents performed for customers, vendors, and bank accounts.

- The customer, vendor, or bank account must also be registered as a contact in the Sales & Marketing application area.

Step 2 is covered in the “Setting Up Synchronization Between Contacts and Customers, Vendors, and/or Bank Accounts” section in this chapter.

For information about verifying that the customer, vendor, and/or bank account is linked to a contact and vice versa, refer to the “Synchronizing Contacts with Customers, Vendors, and Bank Accounts” section in the “Contacts” chapter.

To set up interaction template codes for sales, purchase, and service documents, perform the following procedure:

1. Open the Interaction Template Setup window by clicking Departments > Administration > Application Setup > Sales & Marketing > Marketing, and then under Tasks, click Interaction Template Setup.

2. On the Sales, Purchases, and Service FastTabs of the Interaction Template Setup window, specify interaction templates to be used for creating interactions.

FIGURE 2.6 SPECIFYING INTERACTION TEMPLATE CODES

**Cover Sheets**

You can have the program automatically create an interaction when you print cover sheets for your contacts from the contact card and the Segment window. To do that, specify the COVERSHP interaction template in the Cover Sheets field on the General FastTab of the Interaction Template Setup window.
To read about creating an interaction log entry while printing cover sheets, refer to the “Interactions and Document Management” chapter.

**E-Mail Logging**

You can have the program automatically create an interaction when you send e-mail messages to your contacts. Sending messages is available from the contact, customer, vendor, and the bank account cards by clicking the envelope button to the right of the **E-Mail** field and using the Create Mail wizard. To be able to send and receive e-mail message, you must have Microsoft® Office Outlook® installed.

**NOTE:** Sending and receiving e-mail messages are recorded as interactions when working in the Classic client of Microsoft Dynamics NAV.

For the program to automatically record interactions when sending e-mails, you must

- Specify the interaction template code for e-mail messages on the **General** FastTab in the **Interaction Template Setup** window. In the **E-Mails** field, select the EMAIL interaction template.
- Set up the E-Mail Logging feature on the **E-Mail Logging** tab of the **Marketing Setup** window.

The E-Mail Logging feature creates interaction log entries for your incoming and outgoing e-mails and provides link between an interaction log entry and an e-mail message that was sent or received – it becomes an attachment to the log entry. To use the E-Mail Logging feature, set up the following parameters:

- Time Interval (Sec.)
- The NAV Queue folder
- E-Mail Logging Profile
- Queue Folder Name
- Storage Folder Name
- E-Mail Logging User ID

**NOTE:** You can set up e-mail logging parameters only in the Classic client of Microsoft Dynamics NAV. In the RoleTailored client, e-mail setup fields are disabled.
The following table explains the values in the fields on the **E-mail Logging** tab.

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Time Interval (Sec.)</strong></td>
<td>In this field, enter the interval in seconds that you want messages in the Microsoft Navision Queue folder to be checked. The default is 30 seconds, but you can change it.</td>
</tr>
<tr>
<td><strong>E-Mail Logging Profile Name</strong></td>
<td>In this field, specify a Microsoft Office Outlook profile to be used for e-mail logging. Click the AssistButton 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 AssistButton button.</td>
</tr>
<tr>
<td><strong>Queue Folder Name</strong></td>
<td>In this field, specify a folder that you want to use as your queue folder for your e-mail messages in Microsoft Office Outlook. Click the AssistButton button to select the folder.</td>
</tr>
<tr>
<td><strong>Storage Folder Name</strong></td>
<td>In this field, specify the folder that you want to use as your storage folder for your e-mail messages in Microsoft Office Outlook. Click the AssistButton button to select the folder.</td>
</tr>
<tr>
<td><strong>E-Mail Logging User ID</strong></td>
<td>Use this field to enter the user you want to use for testing or demonstrating the logging. You can select one by clicking the AssistButton next to this field. The user must have a Windows login registered in Microsoft Dynamics NAV. When this Microsoft Dynamics NAV user logs in, the program starts logging e-mails with the interval specified in the <strong>Time Interval (Sec.)</strong> field. Fill out this field, if Microsoft Dynamics NAV Application Server is not used.</td>
</tr>
</tbody>
</table>
Chapter 2: Setup Procedures

### FIGURE 2.8 E-MAIL LOGGING OPTIONS IN THE CLASSIC CLIENT

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

The options in the fields described in the previous table are correlated in the following manner.

- In Microsoft Office Outlook, set up rules that define which e-mails will be copied to the **NAV Queue** folder for the E-Mail Logging feature to detect and link to the corresponding interaction log entries.

**NOTE:** To find out how to set up rules in Microsoft Office Outlook, refer to Microsoft Office Outlook help.

- Create the **NAV Queue** folder in Microsoft Office Outlook (you can give this folder any name) and then select it in the **Queue Folder Name** field on the **E-Mail Logging** tab in the **Marketing Setup** window.

- Create the **NAV Storage** folder in Microsoft Office Outlook (you can give this folder any name), and then select it in the **Storage Folder Name** field on the **E-Mail Logging** tab in the **Marketing Setup** window. When the E-Mail Logging feature is set up and you send an e-mail using the Create Interaction wizard, clicking **Finish** sends an e-mail message. The message becomes the attachment for the recorded interaction in the **Interaction Log Entries** window. The description you entered on the first page of the wizard becomes the subject of the e-mail.

**NOTE:** If no interaction template is specified, the CreateMail wizard will be unavailable. Clicking the envelope button will open the Message window in
Microsoft Office Outlook to create and send the message without recording an interaction log entry.

To find out how to send e-mail messages to contacts and receive them from contacts, refer to the “Interactions and Document Management” chapter.

**Making Phone Calls**

For the program to record interactions when you are making a call, you must

1. Use the Classic client of Microsoft Dynamics NAV.
2. Use cards of the registered customers, vendors, or banks for making calls.
3. Specify an interaction template code for outgoing phone calls on the **General** FastTab of the **Interaction Template Setup** window. The program will use it when it records interactions.

To make a phone call to a contact, open its card and go to the **Communication** tab. The procedure of calling is described in the “Interactions and Document Management” chapter.

![Contact Card](image)

**FIGURE 2.9 A CONTACT CARD**

**Setting Up Synchronization Between Contacts and Customers, Vendors, and/or Bank Accounts**

Synchronization between contacts and customers, vendors, and/or bank accounts means linking contacts with respective customers, vendors, and bank accounts.

Setting up synchronization involves:
Chapter 2: Setup Procedures

- Specifying business relation codes for customers, vendors, and bank accounts.
- Linking contacts with customers, vendors, and/or bank accounts.

To specify business relation codes, go to the **Synchronization** FastTab of the **Marketing Setup** window. In the respective fields, specify:

- CUST for customers
- VEND for vendors
- BANK for bank accounts

![FIGURE 2.10 SETTING UP SYNCHRONIZATION WITH CONTACTS](image)

Having specified business relation codes, you can link a contact to a customer, vendor, and/or bank account. For information about how to link and create contacts from customers, vendors, or bank accounts, refer to the “Synchronizing the Contacts with the Customers, Vendors, and/or Bank Accounts” section in the “Contacts” chapter.

With the synchronization set up, keep in mind the consequences it brings.

**Consequences of Synchronization**

When the contact card is synchronized with the customer card, 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 a contact company is synchronized with a customer, all contact persons that relate to that company are also synchronized with that customer.
• 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.

• From the contact’s customer card, you can create sales quotes, blanket orders, and orders – a contact linked will be specified automatically on these documents.

• From the contact’s vendor card, you can create purchase quotes, blanket orders, and orders – a contact linked will be specified automatically on these documents.

• You can have the program record interactions automatically when you perform specific actions in Microsoft Dynamics NAV, such as printing orders, creating service orders, sending e-mail messages, and so on. Interaction log entries will be created for a contact linked to a customer or vendor which the specific actions are performed for.

• 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, vendor, 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.

**Setting Up Duplicate Search**

The Sales & Marketing application area offers you a possibility 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:

• Have the program automatically generate search strings and then search for a possible duplicate each time you create a contact.

• Search for contacts manually, for example, after you have created new contacts.

Specify the way you want to search for duplicates on the **Duplicates** FastTab of the **Marketing Setup** window.
Setting Up Automatic Search for Duplicates

If you want the program to automatically maintain the search strings you have defined in the Duplicate Search String Setup window, select the Maintain Dupl. Search Strings check box.

Select the Autosearch for Duplicates check box if you want the program to automatically search for duplicates each time you create a new contact. If you want to search for duplicates manually, clear this check box. To find out how to do it, refer to the “Contacts” chapter.

Setting Up Duplicate Search Strings

When searching for duplicates, the program uses search strings. Each time you generate the duplicate search (or each time you create a new company), the program compares the new contact’s search strings with the search strings of the other contacts in the program.

Search strings are set up 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. This window can be accessed by clicking Related Information > Setup > Duplicate Search String Setup in the Marketing Setup window.
For example, set up the search strings – as shown in the “The Duplicate Search String Setup Window” figure for a contact with the following information specified on his contact card:

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

As a result, the program will create the following search strings:

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

**Search Hit Percentage**

On the Duplicates FastTab of the Marketing Setup window, 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 other words, how many search strings must be identical between two contacts for the program to consider them duplicates.

- A low percentage specified in the Search Hit % field results in the program finding many duplicates, however 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 percent of identical search strings.

- A high percentage specified in this field 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 percent of identical search strings.

Summary

The Sales & Marketing application area offers you the following:

- You can have the program copy general information from the company card to the contact card for a contact who works for this company.
- If your contact is already registered in the program as a customer, vendor, and/or bank account, you can link them using business relation code. Then, if you change information on a contact card, the corresponding information will be changed on the appropriate customer, vendor, and/or bank account card.
- You can have the program perform search for duplicate contacts every time you create a new contact.
- The program enables you to record all types of interactions you have with your contacts, such as, meetings, phone calls, e-mail messages, printing sales orders, and so on.
Test Your Knowledge

1. Can the documents that you receive from your contacts be stored within Microsoft Dynamics NAV?

2. True or False:
   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.

3. Complete the following sentence:
   If you want the program to automatically copy the salesperson code from the contact company card to the contact cards of the persons working for this company, select the __________ check box on the Inheritance FastTab.

4. What can a contact be linked with? (Select all that apply.)
   ( ) Customer
   ( ) Bank account
   ( ) Vendor
   ( ) Team
5. What defines the level of precision you can apply when searching for duplicates?
Quick Interaction: Lessons Learned

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

1. 
   
2. 
   
3. 
   
Solutions

Test Your Knowledge

1. Can the documents that you receive from your contacts be stored within Microsoft Dynamics NAV?

MODEL ANSWER:

Yes. All the documents that you send to your contacts, in addition to the documents that you receive from your contacts, can be stored within Microsoft Dynamics NAV.

2. True or False:
   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.

True: 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.

3. Complete the following sentence:
   If you want the program to automatically copy the salesperson code from the contact company card to the contact cards of the persons working for this company, select the _______________ check box on the Inheritance FastTab.

MODEL ANSWER:

If you want the program to automatically copy the salesperson code from the contact company card to the contact cards of the persons working for this company, select the Salesperson Code check box on the Inheritance FastTab.

4. What can a contact be linked with?
   
   (√) Customer
   (√) Bank account
   (√) Vendor
   ( ) Salesperson

5. What defines the level of precision you can apply when searching for duplicates?

MODEL ANSWER:

The level of precision for searching for duplicates is defined by percentage of search hit.