CHAPTER 11: DOCUMENT ARCHIVING

Objectives

The objective for this chapter are:

- Archive a copy of a sales quote.
- Create an interaction log entry while printing a sales quote.
- Restore a sales quote from the archive.
- Archive a copy of a sales order.
- Create an interaction log entry while printing a sales order.
- Restore a sales order from the archive.
Chapter 11: Document Archiving

Introduction

This chapter explains how to archive and restore sales documents and create interaction log entries while going through the sales process. The procedures of archiving and restoring purchase documents and creating interaction log entries are similar to those described for the sales documents.

In the current version of Microsoft Dynamics® NAV 2009, the sales and purchase documents can be archived. This means that when you go through the sales and purchase process, and the documents change their nature (for example, from a quote to an order), archiving enables you to:

- Save a copy of a document (to archive a copy) and create an interaction log entry for the document
- Roll back to a previous version of the document

Archive versions and logged documents can be used later for viewing the sales process history.

Saving a Sales Quote

To keep track of the sales process, it is convenient to save versions of previous documents, for example, quotes.

Manual Archiving

A version of a sales quote can be archived in the Sales Quote window. To archive a sales quote, follow these steps:

1. In the navigation pane, click Home > Sales Quotes.
2. On the list of the sales quotes, browse to the sales quote you want to create an archive copy for and open its card.
3. In the Sales Quote window, click Actions > Functions > Archive Document.
4. In the subsequent message, click Yes to confirm your intention about creating an archive version of the document.

While saving a version of the document, the following actions are taking place:

- The number in No. of Archived Versions field on the sales quote card is incremented by one. This number shows how many archive version a sales quote has.
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FIGURE 11.1 A SALES QUOTE WITH ARCHIVED VERSIONS

- An archive entry appears in the Sales List Archive window.

FIGURE 11.2 THE ARCHIVED DOCUMENT

You can also archive a version of the document while printing it.

1. In the Sales Quote window, click Print.
2. In the Sales – Quote window, select the Archive Document check box.

Notice that the Log Interaction check box is selected by default. That means that as you print the quote, a log entry appears in the Interaction Log Entries.
window for the contact the quote is assigned to (in this case, it is contact CT00002) and a salesperson assigned to the quote (in this case, it is Peter Saddow).

FIGURE 11.3 PRINTING AND ARCHIVING THE SALES QUOTE

3. Click **Print**.

You can view an interaction log entry for the salesperson and for the contact created and a copy of the sales quote archived.

FIGURE 11.4 INTERACTION LOG ENTRY FOR THE SALESPERSON
Automatic Archiving

The program can be set up to create archive versions of sales and purchase documents automatically.

For sales documents, set up automatic archiving in the Sales Receivable Setup window, which can be accessed by clicking Departments > Sales & Marketing > Administration > Sales & Receivables Setup.
Select the Archive Quotes and Orders check box for the program to save a copy of a sales quote that is being converted into an order and a sales order that is being posted.

NOTE: For purchase documents, the program can also be set up to create archive versions automatically. For that, select the Archive Quotes and Orders check box in the Purchase Payables Setup window.

As you have archive versions of a sales quote, you can roll it back to any of archived copies.

Restoring a Sales Quote

You can restore a previously archived version of a sales quote in two different ways:

- From interaction log entries created for the contact person, contact company, or salesperson.
- From the sales quote card.

To restore a sales quote from the contact interaction log entries, do the following:

1. Open the list of the contacts and select a contact you want to restore a quote for.
2. Click Related Information > Contact > Interaction Log Entries. The Interaction Log Entries window appears.
3. Select the interaction log entry for the quote that you want to look at and click Show. The saved version of the document appears.

4. Click Restore and click Yes in the dialog box that appears. Now the quote has been restored.

5. To view the restored quote version, go back to the list of the contacts and click Related Information > Contact > Sales Quotes.

6. In the Sales Quote window, double-click the quote to see it restored.

To restore a sales quote from the sales quote card, follow these steps:

1. Open the list of the sales quotes.
2. Find the relevant quote and open its card.
3. Click the number next to the No. of Archived Versions field on the General FastTab of the Sales Quote window. The Sales List Archive window appears with a list of archived versions.

4. If you want to look at details of the archived versions, select the version you want to look at and click Related Information > Line > Card. The Sales Quote Archive window appears.
5. To view a card of the customer who is involved in the sales quote, click Related Information > Version > Card.

6. To restore the selected archive version of the sales quote, go back to the Sales Quote Archive window, and in the Action Pane, click Restore. The sales quote is restored.

**NOTE:** An archived version of a sales quote cannot be restored, if this sales quote was converted into a sales order.

If you created archived versions of sales quotes and sales orders and then deleted quotes and orders, these created archived versions can be found at Departments > Sales & Marketing > History. Click Sales Quote Archives or Sales Order Archives to view and restore documents.

**Saving a Sales Order**

As with a sales quote, you can save an archive version of a sales order no matter whether it was created from a sales quote or just from scratch, in addition, you can create an interaction log entry while performing specific actions on it. When you print out and send an order for confirmation to the customer, the program creates a log entry with this document and saves an archive copy for future reference. This enables you to track all versions of orders sent to the customer.
The procedure of creating an interaction log entry and saving an archive version of a sales order is the same as for quotes.

If you want to send the order to the customer, do the following:

1. In the navigation pane, click **Home > Sales Orders**.
2. On the list of the sales orders, select an order you want to send to the customer and click **Actions > Print > Order Confirmation**.
3. In the **Order Confirmation** window, select both the **Archive Document** and the **Log Interaction** check boxes.

Once you click **Print**, the program will not just send the order for confirmation to the customer, but also create an archived version of the order and an interaction entry for the contact and salesperson involved in the order. You can see the number of the archived versions next to the **No. of Archive Versions** field on the **General** FastTab of the **Sales Order** window.

To view interaction log entries for the contact, take these steps:

1. In the navigation pane, click **Home > Sales Orders**.
2. On the list of the sales orders, select the order you just sent for confirmation and open its card.
3. Since interaction log entries can be viewed for a contact involved in this order, and not for the order itself, you must open the contact list with the contact. For that, in the **Sales Order** window, click the AssistButton next to the **Sell-to Contact No.** field. The **Contact List** window appears.
4. Select the contact who is assigned to the sales order you worked with and click **Related Information > Contact > Interaction Log Entries**. The **Interaction Log Entries** window appears.

**FIGURE 11.10 LOG ENTRIES FOR THE CONTACT ASSIGNED TO THE SALES ORDER**
If the contact belongs to a company and not an individual contact, then this interaction is recorded for the contact company also. To view the interaction for a contact company, follow these steps:

1. In the navigation pane, click **Home > Contacts**.
2. Browse to the company that the contact belongs to. Contacts that belong to companies are listed below the company name. Another way to view related contact is to select a company and click **Related Information > Contact > Related Contacts**. The **Contact List** window appears with a list of the related contacts.
3. When you find a company that the contact belongs to, select it and click **Related Information > Contact > Interaction Log Entries**. The **Interaction Log Entries** window appears with a list of log entries.

The **Contact No.** field for these records shows the number of the contact that belongs to this company.

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**NOTE**: An archived version of a sales quote cannot be restored if this sales quote was converted into a sales order.

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**Restoring a Sales Order**

Sometimes a customer wants you to create a sales order using a previous version of the sales order. If a sales order was previously archived, you can restore it.

As with the sales quote, you can restore a sales order in one of the two ways:

- From the interaction log entries created for contact person, contact company, or salesperson.
- From the sales order card itself.

The procedure of restoring a sales order is similar to that for restoring a sales quote.

To restore a sales order from the contact person or contact company interaction log entries, follow this procedure:

1. Open the list of the contacts.
2. Browse to the contact person or contact company you want to restore the sales order for. Click **Related Information > Contact > Interaction Log Entries**. The **Interaction Log Entries** window appears.
3. On the list of log entries, select the entry for the sales order. To view the card for this entry, click **Show**. The **Sales Order Archive** window appears.
4. To restore a sales order from this version, click **Restore**. The sales order has been restored. You can print it and send to the customer.
To restore a sales order from the sales order card, follow this procedure:

1. Open the list of the sales orders.
2. Select a sales order and open its card.
3. If the order has archived version, you can see it by the number in the **No. of Archived Versions** field. If it is more than zero, click it. A list of the archived versions appears.
4. Select the version you want to restore and click **Related Information > Line > Card**.
5. Click **Restore**: the order has been restored.

Now you can print the order and send it to the customer.
Lab 11.1 – Issue a Quote to a Contact

In this lab, you will practice creating a sales quote and sending it to a contact.

Scenario

You have received a phone call from Ergonomic Office Systems requesting a quote for office furniture. Register a quote and send it by fax.

Challenge Yourself

1. Create a sales quote.
2. Send it by fax to Ergonomic Office Systems.

Need a Little Help?

1. Create a sales quote for Ergonomic Office Systems using a customer template.
2. Fill in the details of the quote using the item Olympic Office System.
3. Send the quote by fax to Ergonomic Office Systems. Make sure that you create the log entry and save a copy of the quote in Microsoft Dynamics NAV.

Step by Step

Create a sales quote for Ergonomic Office Systems using a customer template.

1. In the navigation pane, click the Home button and then click Sales Quotes.
2. In the Action Pane, click New to create a new sales quote.
3. Press ENTER to let the program enter the next available number for the quote.
4. Click the Assist Button next to the Sell-to Contact No. field. The Contact List window appears.
5. Select contact CT100004, Ergonomic Office Systems, and click OK.
6. Click the Assist Button next to the Sell-to Customer Template Code field and select the GB LND customer template.

Fill in the details of the quote using the item Olympic Office System.

1. Go to the Lines FastTab of the Sales Quote window.
2. Click the Assist Button next to the Type field and select Item.
3. In the Quantity field, enter “1”.

Send the quote by fax to Ergonomic Office Systems. Make sure that you create the log entry and save a copy of the quote in Microsoft Dynamics NAV.

1. To send a quote by fax, you have to print it out first. In the Sales Quote window, click Actions > Print.
2. Select the Log Interaction and Archive Document check boxes to create a log entry and save a copy of the document.
3. Click Print to print the sales quote out and send it by fax.

Lab 11.2 – Restore the Quote

In this lab, you will practice restoring the previously archived sales quote. This lab is a continuation of Lab 11.1.

Scenario

Two days later, the purchase manager from Ergonomic Office Systems calls and requests changes to the quote. He now wants to have two more items on the quote and change the shipment method to CIF.

Three weeks later, the purchase manager decides to place an order based on a previous quote.

Challenge Yourself

1. Modify the sales quote to fit the new request.
2. Send the new quote.
3. Restore the previous quote.
4. Make the order from this quote.

Need a Little Help?

1. Open the quote, and change the quantity by incrementing two units and shipment terms.
2. Send the new quote with changes for confirmation and save a copy.
3. Open the previously saved sales quote and restore it.
4. Convert the quote into the sales order.

Step by Step

*Open the quote and change the quantity by incrementing two units and shipment terms.*

1. In the navigation pane, click the Home button and then click Sales Quotes.
2. On the list of the quotes, browse to the quote you created for Ergonomic Office Systems in Lab 11.1 and double-click it to open its card.
3. On the Lines FastTab, in the Quantity field, increment the quantity by two.
4. Go to the Shipping FastTab. Click the AssistButton next to the Shipment Method Code field and select CIF.
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Send the new quote with changes for confirmation and save a copy.

1. Click **Actions > Print**. Select the **Archive Document** check box for saving a copy of this quote.
2. Click **Print** to print the quote and send it for confirmation by fax.

Open the previously saved sales quote and restore it.

1. Open the sales quote a copy of which you sent to Ergonomic Office Systems.
2. Click the number in the **No. of Archived Versions** field.
3. In the Sales List Archive window, select the version you want to restore and click **Related Information > Line > Card**.
4. In the Sales Quote Archive window, click **Restore**. The previous version of the sales quote is restored. Confirm your intention by clicking **Yes** in the consequent message.

Convert the quote into the sales order.

1. In the Action Pane of the Sales Quote window, click **Make Order**.
2. Click **Yes** to confirm your intention in converting the sales quote to an order.

Summary

Microsoft Dynamics NAV offers you a possibility of archiving sales and purchase documents and creating an interaction log entry while specific actions on those documents are performed. Thus, you can have the program create an interaction log entry while printing a sales quote or a sales order. You can also archive a copy of the quote or order and refer to it in further work. Archiving a document enables you to restore it from any of the previously archived versions.
Test Your Knowledge

1. What documents can be archived?

2. True or False:
   Only one version of the document can be archived.

3. Complete the following sentence:
   You can restore a sales quote from ___________ and from ______________.

4. What check boxes must be selected to create a log entry and save a sales quote while printing it? (Select all that apply.)
   ( ) Log Interaction
   ( ) Archive Quote
   ( ) No. of Copies
   ( ) Archive Document
5. Can you restore a sales order? If yes, how can you do it?
Quick Interaction: Lessons Learned

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

1.  
   
   ____________________________________________
   
   ____________________________________________
   
   ____________________________________________

2.  
   
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3.  
   
   ____________________________________________
   
   ____________________________________________
   
   ____________________________________________
Solutions

Test Your Knowledge

1. What documents can be archived?

MODEL ANSWER:

You can archive sales, purchase, and service documents.

2. True or False:
   Only one version of the document can be archived.

MODEL ANSWER:

False. You can create as many document archived versions as you want. The number of archived versions for the document can be seen in the No. of Archived Versions field in the document.

3. Complete the following sentence:
   You can restore a sales quote from ___________ and from ______________.

MODEL ANSWER:

You can restore a sales quote from a interaction log entry created for a contact and from a sales quote card.

4. What check boxes must be selected to create a log entry and save a sales quote while printing it?

   (√) Log Interaction
   ( ) Archive Quote
   ( ) No. of Copies
   (√) Archive Document

5. Is it possible to restore a sales order? If yes, how can you do it?

MODEL ANSWER:

Yes, it is possible to restore a sales order if the previous version of the sales order is archived. Find a contact for which you want to restore a sales order, and access the Sales Order window. Click the figure next to the No. of Archived Versions field, select a version, and from the Sales List Archive window, open the Sales Quote Archive window. In the Action Pane, click Restore: the sales order is restored.