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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.

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.

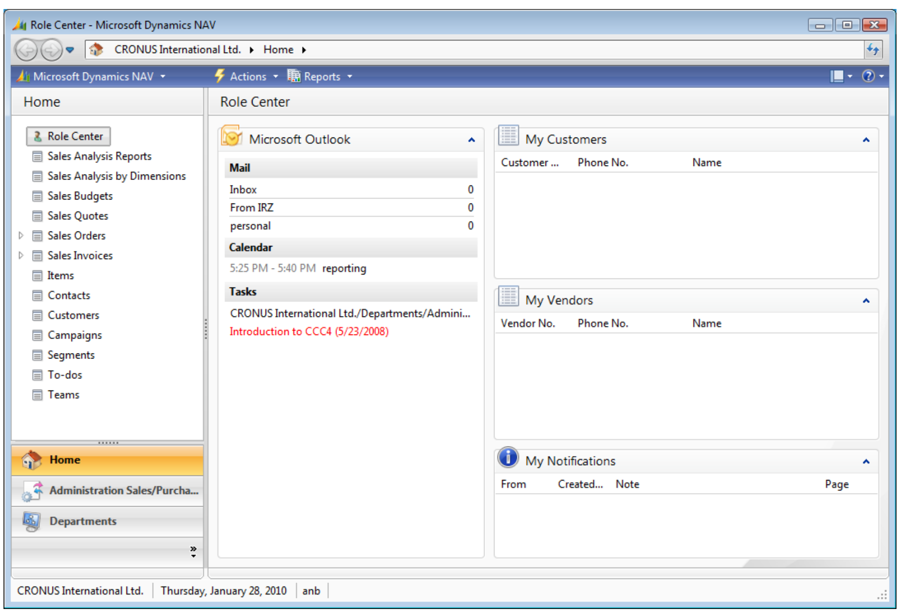

FIGURE 2.1 THE SALES MANAGER ROLE CENTER

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.

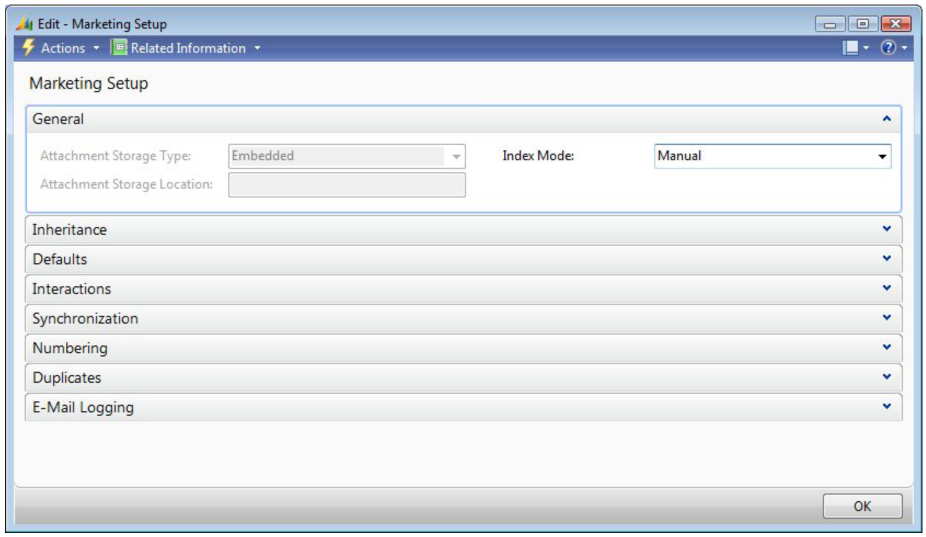

FIGURE 2.2 THE GENERAL FASTTAB OF THE MARKETING SETUP WINDOW

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.

Index Mode Option	Description
Auto	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.
Manual	If this option is selected, you will need to run the

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