

Business Central Relationship Management Workshop Instructor Notes

Duration:	5 hours
Delivery Method:	Group Internet – Via Microsoft Teams Meeting
Instructor(s):	Application Consultant
Difficulty Level	Beginning and Intermediate
Description and Learning Objectives:	
<p>Is your company looking to expand its capability to improve relationships with your customers? Are you looking at adding marketing features to work with your Business Central ERP system? There are options outside Business Central that will work and can become very expensive. Before spending all that extra money, check out what is already available to you in Business Central regarding Relationship Management.</p> <p>In this Workshop, we will start at the beginning with setups and by the end of this workshop you will be able to create your own mass mailings, track interactions and create tasks, plus much more.</p> <p>Topics discussed will include:</p> <ul style="list-style-type: none"> • Contacts • Quotes • Questionnaires • Interactions • Opportunities • Sales Cycles & Tasks • Segments • Campaigns 	
Advanced Preparation:	
<p>What you will need for this workshop:</p> <ul style="list-style-type: none"> • A basic understanding of Business Central / NAV • A basic knowledge of Customers and Contacts in Business Central / NAV • A 'Play' company in your Test environment that you can work in. 	

Tentative Agenda	
Topic	Duration
Introductions	10 Minutes 9-9:10
Agenda and Goals Overview <ul style="list-style-type: none"> • Features in Business Central Relationship Management • Terms 	5 Minutes 9:10-9:15
Setup <ul style="list-style-type: none"> • Role Center Profiles <ul style="list-style-type: none"> ○ Built in ○ Custom • Marketing Setup <ul style="list-style-type: none"> ○ Inheritances from the Company ○ Defaults ○ Interactions ○ Duplicates • Salespersons 	15 Minutes 9:15-9:30
Contacts <ul style="list-style-type: none"> • Company • Persons • Marketing specific fields <ul style="list-style-type: none"> ○ Job responsibility ○ Industry ○ Salutations • Create as a Customer <ul style="list-style-type: none"> ○ Customer Template • Business Relations 	15 Minutes 9:30-9:45
Quotes <ul style="list-style-type: none"> • Create quote • Link to an opportunity • Send via email. • Update the opportunity • Convert to a Sales Order • Make order • Close the opportunity <ul style="list-style-type: none"> ○ Opportunity Won 	15 Minutes 9:45-10:00



<p>Questionnaires:</p> <ul style="list-style-type: none"> • Questionnaire Setup <ul style="list-style-type: none"> ○ Company Questionnaire ○ Person Questionnaire • Automatic Classification 	<p>30 Minutes 10-10:30</p>
<p>Break</p>	<p>5 Minutes 10:30-10:35</p>
<p>Interactions</p> <ul style="list-style-type: none"> • Create Interactions in Contact & in Salesperson • Add an interaction out of the Salesperson. <ul style="list-style-type: none"> ○ Phone call interaction ○ Meeting Interaction • Interaction Templates <p>Tasks</p> <ul style="list-style-type: none"> • Create Task in Salesperson and Contact • Closing a task 	<p>25 Minutes 10:35-11:00</p>
<p>Opportunities</p> <ul style="list-style-type: none"> • Create Opportunities • Sales Cycles <ul style="list-style-type: none"> ○ Stages ○ Activities ○ Tasks <ul style="list-style-type: none"> ▪ Close a task on an opportunity. • Won or Lost Opportunities <p>Opportunity & Task Reports</p> <ul style="list-style-type: none"> • Opportunity List (Pipeline) Tasks type • Opportunity Statics • Task List (Matrix) Tasks type • Opportunities – LIST - Report • Opportunity details (report) 	<p>30 Minutes 11:00 – 11:30</p>

<p>Segments</p> <ul style="list-style-type: none"> • Create a Segment <ul style="list-style-type: none"> ○ Add contacts. ○ Refine or Reduce ○ Reuse • Segment Actions – emails, mailings, log 	<p>30 Minutes 11:30-12:00</p>
<p>Break - Lunch</p>	<p>30 Minutes 12:00-12:30</p>
<p>Campaigns</p> <ul style="list-style-type: none"> • Create • Link to interactions • Link to an Opportunity • Add Sales prices to a Campaign • Statistics 	<p>30 Minutes 12:00-1:00</p>
<p>Outlook Connector</p> <ul style="list-style-type: none"> • Assisted Setup • Outlook Add-in 	<p>30 Minutes 1:00-1:30</p>
<p>Review of Lessons Learned</p> <ul style="list-style-type: none"> • Questions 	<p>20 Minutes 1:30-2:00</p>