



Infor LN CRM User Guide for CRM

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Publication Information

Document code	crmug (U9653)
Release	10.5 (10.5)
Publication date	February 6, 2024

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About this document

This document describes the process to set up and use Customer Relations Management (CRM) to:

- Specify and track sales and marketing data in a flexible way
- Register information on prospective and current business partners
- Use opportunities to record and monitor sales potentials
- Create, schedule, and report various sales and marketing activities
- Set up and use the text editor
- Synchronize contacts and activities between CRM and Microsoft Exchange

Document summary

Chapter number	Chapter title	Content
Chapter 1	CRM	Overview of CRM
Chapter 2	Master data	Setup of CRM
Chapter 3	Marketing, Sales, and Utilities	CRM functionality
Chapter 4	Text editor	Setup and use of the text editor
Chapter 5	Microsoft Exchange	Synchronization of CRM contacts and activities to Microsoft Exchange

How to read this document

This document was assembled from online Help topics. As a result, references to other sections are presented as shown in the following example:

For details, refer to *Introduction*. To locate the referred section, please refer to the Table of Contents or use the Index at the end of the document.

Underlined terms indicate a link to a glossary definition. If you view this document online, clicking the underlined term takes you to the glossary definition at the end of the document.

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CRM – overview

To remain competitive and profitable, you must identify, communicate, and track the requirements of business partners. In CRM, you can specify and track sales and marketing data in a flexible way. You can specify information on prospective business partners, maintain additional information on current business partners, use opportunities to record and monitor sales potentials, and create, schedule, and report on various sales and marketing activities. Contacts and activities can be synchronized between CRM and Microsoft Exchange.

CRM does not have a set of mandatory steps. All information is optional.

Customer relation management master data

Before you can use CRM, you must define the master data.

For more information, refer to *CRM – master data* (p. 9).

Customer relation management functionality

You can use CRM to execute the following:

- Carry out opportunities
- Define activities
- Create letters
- Create selection expressions
- Create reports
- Use the customer 360 session

For more information, refer to *CRM – functionality* (p. 23).

CRM- Text Editor

When you create letters, you can use the Text Editor to maintain the layout of standard letters.

When you create selection expressions, you can use the Text Editor to create expressions.

For more information, refer to *CRM – Text Editor (p. 31)*.

Synchronizing CRM contacts and activities to Microsoft Exchange

Contacts from LN can be synchronized to Microsoft Exchange.

Activities with the **Call** or **Appointment** types can be synchronized as calendar events between LN and Microsoft Exchange. Calendars are synchronized in both directions.

For more information, refer to *Synchronizing CRM contacts and activities to Microsoft Exchange (p. 45)*.

CRM – master data

You must define the following master data to be used in customer relations management (CRM):

- **CRM parameters**
The parameters for customer relations management.
- **Addresses**
The definition of addresses and address formats.
- **Business partners, contacts, and employees**
The sessions for working with business partners, contacts, and employees.
- **Optional sessions**
The sessions with basic customer relation management information.
- **Attributes**
The set up of attributes, which are used to record distinctive information on business partners, contacts, activities, opportunities, letters, and reports.

CRM parameters

CRM Parameters (tdsmi0100m000)

This session displays the following group boxes:

- **Opportunities**
Contains parameters for opportunities.
- **Contacts**
Contains a default attribute set for contacts.
- **Default Attribute Set for Business Partner**
Contains attribute sets for business partners. You can link a default attribute set to various business partner roles.
- **Default Attribute Set for Potential Business Partner**
Contains attribute sets for prospects. You can link a default attribute set to various potential business partner roles.
- **Miscellaneous**
Contains general parameters that are used throughout CRM.

Note

You can enter default settings for a user or a group of users in the Defaults by User (tdsmi0520m000) session. The settings made in this session overrule the settings specified in the CRM Parameters (tdsmi0100m000) session.

COM Parameters (tccom0000s000)

You can define the following CRM parameters in this session:

- Number groups for business partners, contacts, addresses, and activities.
- Series for business partners, contacts, addresses, tasks, appointments, calls, mailings, and e-mails.
- The **Initials Based On** field for contacts.
- The **Synchronize Contacts** check box.
- The **Path for Attachments** and **Maximum Email Size** fields for e-mails.
- The **Synchronize Activities** check box.

Addresses

To communicate with persons and organization in CRM, you must define:

- Addresses in the Addresses (tccom4530m000) session.
- Address formats in the Address Formats (tccom4535m000) session.

For more information, refer to:

- *Using addresses (p. 14)*
- *Defining address formats (p. 15)*
- *Using address formats (p. 18)*

Business partners, contacts, and employees

In CRM, you work with business partners, contacts, and employees that you can specify in the following sessions:

- **Business partners**
Business Partner (tccom4100s000)
- **Contacts**
Contact (tccom1640m000)
- **Employees**
Employees - General (tccom0101m000)

For more information, refer to:

- Business partners
- *Business partner contacts (p. 21)*
- Defining employees

Optional sessions

The following sessions are optional. Each session includes basic CRM information:

- **Salutations (tcmcs1120m000)**
Use this session to define salutations that can be used for introductions on letters addressed to contacts.
- **Phases (tdsmi0103m000)**
Use this session to define phases, which enable you to keep track of a particular stage or phase in a sales process.
- **Opportunity Types (tdsmi0107m000)**
Use this session to define opportunity types that can be used to classify opportunities.
- **Sales Processes (tdsmi0108m000)**
Use this session to define sales processes, which are standard sales methodologies that must be followed when working on an opportunity.
- **Phases by Sales Process (tdsmi0109m000)**
Use this session to define the phases for a sales process.
- **Attentions (tcmcs1122m000)**
Use this session to define attention codes, which are messages that you can link to any contact, opportunity, or activity.
- **Promotions (tcmcs1123m000)**
Use this session to define promotions, which can be used to represent items given to contacts to show appreciation for their business, or to indicate what type of promotional activities have been used in conjunction with a given business partner.
- **Sources (tcmcs1124m000)**
Use this session to define sources to keep track of where business partners are contacted. For example, a company that goes to trade shows might want to know how many new prospects they received by going to that trade show.
- **Industry Codes (tcmcs1125m000)**
Use this session to define industry codes, which are used to classify business partners by type of business for the purpose of, for example, segmenting customers for territory management and campaigns.
- **Buyer Roles (tcmcs1126m000)**
Use this session to define buyer roles, which are used to classify a contact's decision making powers in an opportunity.

Attributes

You can link attributes to the following business objects:

- Business partners
- Contacts
- Opportunities
- Activities

In addition, you can use attribute information in reports and letters.

You must complete the following steps to define attributes and attribute sets:

Step 1: Create attributes

Create attributes in the Attributes (tdsmi0550m000) session.

Notes

- The fields on the **Reference** tab are optional. You need not fill them if no reference or zooming must occur.
- Attributes are very similar to the LN fields. For example, a calculator can be used on both the integer and fraction attributes, the same way as in standard numeric LN fields. The calendar can be used on date attributes as well.
- If an attribute is of the **Option** type, fill the options in the Options by Attribute (tdsmi0151m000) session.

Step 2: Create attribute sets

You can create multiple attributes to link to a business object. If you want to attach the same attributes together, use the Attribute Sets (tdsmi0152m000) session to create attribute sets.

Step 3: Link attributes to attribute sets

Link the attributes to the attribute set in the Attributes by Attribute Set (tdsmi0153m000) session. An attribute may appear in more than one attribute set.

Attribute sets can be added to the following sessions:

- Attributes by Business Partner (tdsmi1101m000)
- Attributes by Opportunity (tdsmi1111m000)
- Attributes by Contact (tdsmi1123m000)
- Attributes by Activity (tdsmi2101m000)

Step 4: Link attributes to business objects

Attributes can be linked to business objects as follows:

- By using default attribute sets, which you can define in the Defaults by User (tdsmi0520m000) session or in the CRM Parameters (tdsmi0100m000) session.
- By globally adding an attribute set to multiple business partners, opportunities, and so on, at one time in the Global Addition of Attributes (tdsmi2210m000) session.
- By globally adding activities to multiple business partners, opportunities, and so on, at one time in the Global Addition of Activities (tdsmi2210m100) session. The addition of activities in this session must be based on an activity template to which an attribute set is linked in the Activity Templates (tdsmi0155m000) session.
- By manually adding attributes to specific business objects. You can add attributes one by one or by attribute set in the following sessions:

- **Business Partner (tccom4100s000)**
Add attributes to a business partner on the **Additional Attributes** tab, which refers to the Attributes by Business Partner (tdsmi1101m000) session.
- **Opportunity (tdsmi1610m000)**
Add attributes to an opportunity on the **Additional Attributes** tab, which refers to the Attributes by Opportunity (tdsmi1111m000) session.
- **Contact (tccom1640m000)**
Add attributes to a contact on the **Additional Attributes** tab, which refers to the Attributes by Contact (tdsmi1123m000) session.
- **Activities (tccom6100m000)**
Add attributes to an activity on the **Additional Attributes** tab of the Appointment (tccom6600m100), Call (tccom6600m200), Task (tccom6600m300), or Mailing (tccom6600m400) sessions, which refers to the Attributes by Activity (tdsmi2101m000) session.

Step 5: Enter values for attributes

On the **Additional Attributes** tab of the Business Partner (tccom4100s000), Opportunity (tdsmi1610m000), Contact (tccom1640m000), and Activities (tccom6100m000) sessions, you can enter values for the attributes.

Based on the type of attribute, the calculator or calendar can be available when you enter values. It is mandatory to enter a value if the attribute is set up that way.

Example

- **Attribute linked to a business partner**
A company has decided to check whether or not their suppliers are ISO 9000 certified. By creating an attribute called ISO 9000? and linking this attribute to each of their suppliers, the company can track this information. The company sets the default value for this expression to No.
- **Attribute linked to an activity**
A company has created an activity used to track complaints from the warehouse to suppliers. Attached to this activity is an attribute set called COMP = Complaints, which lists the information that they wish to track each time an issue comes up. One of the attributes is a field in which the warehouse person rates the supplier's response. The available values are Great, Good, Poor, and Unacceptable.
- **Attribute set**
Each year a company conducts a customer satisfaction survey. Each of the survey questions is created as an attribute and all of the questions are grouped in an attribute set.

Addresses

Using addresses

You use addresses to register the information that you need to communicate with persons and organization. You define addresses for:

- Companies
- Departments
- Employees
- Warehouses
- Business partners
- Contacts
- Factoring companies
- Banks

Distances

In addition, you can define addresses for other locations and/or areas between which you wish to define the distances. You can define distances in the following sessions:

- Distance Table by ZIP Code/Postal Code (tccom4538m000)
- Distance Table by City (tccom4537m000)

Address formats

You can use address formats to define how the address must be printed.

The state or province abbreviation

In some countries it is customary to use the abbreviation of a state name or province name instead of the full name when the address is printed. If you specify the abbreviation of the state name or province name in the States/Provinces (tcmcs1143m000) session, LN prints the abbreviation. If you do not specify an abbreviation, LN prints the text that you specified for the state or province description. When you define a company in LN, you must define the company's address. The company's address is used in Financials.

Business partner addresses

When you define a business partner, you define the business partner master data and then the details for each specific business partner role. You define an address for each role. The business-partner master-data address is the default address for the roles.

You can use this functionality to register an organization's main address as well as the specific addresses of their departments and warehouses.

Address per document type

The addresses that you specify for business partners, contacts, warehouses, and others, are the default addresses. For example, the address of the ship-to business partner is the default address on the shipping order. When you create the order you can select a different address for the order.

North American and Canadian tax reporting

For NA and Canadian sales tax reporting, the state or province and the GEO code are used to determine:

- The tax jurisdiction in which transactions take place
- To which authorities the tax must be paid.

ZIP code and postal codes

LN uses the ZIP code or postal code to determine the distance between delivery addresses, if you defined the distances in the Distance Table by ZIP Code/Postal Code (tcom4538m000) session.

You can also use the ZIP codes to indicate areas where doing business is risky, and block transactions with business partners in such areas.

Defining address formats

You define an address format by using the Address Formats (tcom4135s000) session.

Define for each address field where and how it must be printed, by specifying:

- **Line**
The number of the address line.
- **Sequence**
The sequence number of this field on the line.
- **Priority**
The priority of this field.
- **Space**
The number of spaces to follow this field.

Sequence

You can use the sequence number to print more than one field on a line. If the fields do not fit on the line, the information is truncated at the end of the line. LN does not check the priorities of the fields in this case.

Priority

You can use the priority to indicate which address fields can be skipped. If there are not enough lines available to print the complete address according to the specified format, the lines that contain fields with a low priority are not printed. 1 = highest priority, 2 = second priority, and so on.

Free text

You can specify free text that will be inserted between the address fields. You can use this to add commas, or the text P.O. Box or CEDEX to the address.

Use the **Communication** tab of the Address Formats (tccom4135s000) session to define the free texts of a format.

You define the position of the free text in the same way as for the other address fields. You can define only one position for a free text. For example, if you need two commas, you must define two free texts with a comma.

For each format you can define:

- Three long free texts, of up to 20 characters each.
- Six short free texts, of up to 6 characters each.

Free text is treated as prefix and tag to the other address fields. These rules apply:

- A short free text at the end of a line is not printed (a long free text is).
- If there is only free text on a line, the line is not printed. The free text can be long free text or short free text.

For example, if you specify a format in which **Name 2** is printed on line 2 followed by a free text, the entire line is skipped if the **Name 2** field of the address is empty.

Note

You can specify the same combination of line, sequence, and priority for only one address field.

Example

Required printing address:

line 1:	Name
line 2:	Name 2
line 3:	P.O. Box (space) P.O. Box Number
line 4:	City, (space) City 2
line 5:	ZIP Code/Postal Code (space) (space) Country

Address Format	Line	Sequence	Priority	Space
Name	1	1	1	0
Name 2	2	1	1	0
P.O. Box Number	3	2	1	0
City	4	1	1	0
City 2	4	3	1	0
Country	5	3	1	0
ZIP Code/Postal Code	5	1	1	2
<i>P.O. Box</i>	3	1	1	1
,	4	2	1	2

where:

- *P.O. Box* is a long free text
- The comma is a short free text

Note

- Set the values for the address fields that are not used to zero.

- **Name 2** is only printed if there are five lines available on the order or report. Otherwise, only **Name** is printed and **P.O. Box Number** is printed on the second line of the address.
- If line 4 is not long enough, **City 2** is truncated.

Using address formats

You use address formats to define how addresses must be printed on documents.

The address lines on a document are usually 35 positions. The maximum is 60 positions. For this reason, two fields are available for the **Name**, **Street**, and City name fields in the Addresses (tccom4130s000) session. This enables you to print parts of the name, address, and city on separate lines, or to print only the first parts.

Address format and address lines format

In the Addresses (tccom4130s000) session, you can link an address format in these fields:

- **Address Format for Address Lines**
- **Address Format**

The **Address Format for Address Lines** is used to retrieve the correct address data for the **Address Line 1** through **Address Line 6** fields in the Addresses (tccom4130s000) session. These address line (1-6) fields are mainly used to exchange address data between LN and an external package.

If you do not want these address line (1-6) fields to be updated each time an update is made to a field that is specified in the address format, you must leave the **Address Format for Address Lines** field empty. If required, you can upload address lines from the Update Address Formats (tccom4235m000) session.

The **Address Format** in the Addresses (tccom4130s000) session, is the standard format for the specified address. If this field is empty, LN retrieves a country address format or a default format.

Country address format

You can define an address format for a country in the Countries (tcmcs0110s000) session. You use this to specify if the house number precedes or follows the name of the street, and if the ZIP/postal code precedes or follows the name of the city, in a specific country. The country address format is used for all addresses in that country for which you do not specify a specific address format.

Default format

When you specify or select an address, you can optionally link an address format to it. However, LN cannot print an address if it cannot find the format to be used. You must specify a default format to avoid that addresses cannot be printed.

To use the default format, specify an address format for the address of the company in which you are working. You can specify an address for a company in the General Company Data (tccom0502m000) details session. From the **Address Code** field in the General Company Data (tccom0102s000) session,

you can zoom to the Addresses (tccom4530m000) in which you can view the linked (default) address format.

LN uses the most specific format to print an address. It searches for and uses the address formats in this order:

1. The format linked to the address
2. The format defined for the country of the address
3. The default format

One address in different formats

If the same address must be printed in different formats, you must make a copy of the address and specify a different format for the copy. You must specify a new, unique code for the copied address.

You use this, for example, if on a request for quotation you want to print the fax number and e-mail address, but on a shipping order this information is not necessary. You can also achieve this by specifying a lower priority for the fax number and e-mail address.

Business partners

Defining business partners

These methods are available to define business partners:

- Specify all the business partner details in the Business Partner (tccom4100s000) session.
- Select business partner default details in the Easy Entry Business Partner (tccom4201m000) session.

In the COM Parameters (tccom0000s000) session, you can assign a default number group for business partners. If a default number group is not specified, you can manually specify your own code.

To set up and use business partner default data:

Step 1:

Define sets of default details for business partners in the Business Partner Defaults (tccom4101m000) session.

To verify the details in the Business Partner (tccom4100s000) session, you can select the **To be Verified** check box. After you verified the details or specified the remaining details, you can clear the check box.

If you create a new set of default data, LN retrieves the initial default language from the General Company Data (tccom0102s000) session, and the currency and the exchange rate type from the Companies (tccom1170m000) session.

Step 2:

Specify the business partner code and name in the Easy Entry Business Partner (tccom4201m000) session.

In the **Business Partner Role** field, select the business partner type.

If you select **Customer**, LN uses the default details for these business partner roles:

- **Sold To**
- **Ship To**
- **Invoice To**
- **Pay By**

The **Invoice To** and **Pay By** check boxes can be selected only if the **Financial Roles** check box is selected for the customer in the Business Partner Defaults (tccom4101m000) session.

If you select **Supplier**, LN uses the default details for these business partner roles:

- **Buy From**
- **Ship From**
- **Invoice From**
- **Pay To**

The **Invoice From** and **Pay To** check boxes can be selected only if the **Financial Roles** check box is selected for the supplier in the Business Partner Defaults (tccom4101m000) session.

If you select **No roles**, LN only uses the default details for the business partner master details.

Step 3:

Select an address and a contact in the Easy Entry Business Partner (tccom4201m000) session. If you press Tab, LN displays the address details or the contact details in the corresponding fields.

Step 4:

Click **Create** in the Easy Entry Business Partner (tccom4201m000) session. LN creates the business partner master data and the business partner roles. You can use the Business Partner (tccom4100s000) session to view and verify the generated details, and to specify details in the optional fields.

Note

The default set for which the **Number** field is one (1) in the Business Partner Defaults (tccom4101m000) session, must have the **Business Partner Role** field set to **Customer and Supplier** and can never be deleted. The reason for this is that this set is used as a fallback if the default set selected in the Easy Entry Business Partner (tccom4201m000) session includes invalid data and cannot be used to generate business partner data.

Contacts

Business partner contacts

For each business partner you can define the business partner's contact.

Contact parameters

In the COM Parameters (tccom0000s000) session, you can define these contact parameters :

- **Use Number Group for Contacts**
- **Number Group**
- **Series**
- **Initials Based On**
- **Synchronize Contacts**

Contacts and business partner roles

Use the Contacts (tccom4540m000) session to enter a new contact after which you can use the Contact (tccom1640m000) session to register the contact's details.

A contact can be linked to more than one business partner role.

You can link:

- Business partners to a contact in the Business Partner Roles by Contact (tccom4546m000) session.
- Contacts to a business partner in the Contacts by Business Partner Role (tccom4545m000) session.

In both sessions, you can also define whether or not the contact is the primary contact for a business partner role.

If a contact represents the business partner in a specific role, the contact appears on the **Contacts** tab of the relevant business partner session. The **Contacts** tab refers to the Contacts by Business Partner Role (tccom4545m000) session and appears in these sessions:

- Business Partner (tccom4100s000)
- Sold-to Business Partner (tccom4110s000)
- Buy-from Business Partner (tccom4120s000)
- Invoice-to Business Partner (tccom4112s000)
- Invoice-from Business Partner (tccom4122s000)
- Pay-by Business Partner (tccom4114s000)
- Pay-to Business Partner (tccom4124s000)
- Ship-to Business Partner (tccom4111s000)
- Ship-from Business Partner (tccom4121s000)

CRM – functionality

You can use CRM to do the following:

- **Carry out opportunities**
Opportunities
- **Define activities**
Activities
- **Create letters**
Letters
- **Create selection expressions**
Selection expressions
- **Create reports**
Reports
- **Use the Customer 360 session**
Customer 360

Opportunities

Opportunities are used by sales persons to record and monitor sales information related to a business partner for the purpose of selling a product or service to this business partner.

You can create opportunities in the Opportunity (tdsmi1610m000) session.

You can use this session to do the following:

- Assign and reassign an opportunity to a sales representative.
- Maintain the progress on an opportunity by updating the phase of the sales process and by assigning a probability percentage to win the opportunity.
- Update the opportunity status.
- Enter, maintain, or delete activities linked to an opportunity.
- Assign contacts to an opportunity in the Contacts by Opportunity (tdsmi1122m000) session, which displays who to contact at the business partner for this opportunity.

- Add items to an opportunity in the Items by Opportunity (tdsmi1113m000) session, which you can offer as sales quotation lines to a business partner.
- Add reference information to an opportunity in the References by Opportunity (tdsmi1115m000) session.
- Globally add attributes to an opportunity in the Attributes by Opportunity (tdsmi1111m000) session.

Generating a sales quotation from an opportunity

Because a sales quotation can be generated from an opportunity, an opportunity can be the basis for product offerings to a business partner. If items are added to an opportunity, quotation lines can be generated for the items when generating a sales quotation from an opportunity.

Note

In the Opportunity (tdsmi1610m000) session, you can:

- Add items to an opportunity on the Items tab, which refers to the Items by Opportunity (tdsmi1113m000) session.
- Generate a sales quotation and quotation lines from the opportunity by clicking **Generate Quote** on the appropriate menu.

The following apply to the generation process:

- Only items whose **Select** check box is selected on the Items tab of the Opportunity (tdsmi1610m000) session, are inserted as quotation lines on the sales quotation.
- When the sales quotation is generated, the opportunity number is filled as a reference number in the **Opportunity** field of the Sales Quotation (tdsls1600m000) session.
- When the sales quotation is generated, the sales quotation number is filled as a reference number on the Reference tab of the Opportunity (tdsmi1610m000) session, which refers to the References by Opportunity (tdsmi1115m000) session.
- The number series that is used for generating sales quotations, is defaulted as follows:
 - a. Sales Offices (tdsls0512m000)
 - b. Sales User Profiles (tdsls0139m000)
 - c. Sales Order Types (tdsls0594m000)
 - d. Sales Quotation Parameters (tdsls0100s100)
- The origin of the generated sales quotation is **Opportunity**.
- The **Price Origin** of the generated sales quotation lines is **Manual**, so prices and discounts are not automatically recalculated.
- If the opportunity's item has a linked peg, the peg is copied to the generated sales quotation line.
- If no items are linked to an opportunity, you can choose to only generate a sales quotation header and no quotation lines.

Note

You cannot generate a sales quotation from an opportunity if its **Status** is **Dead, Won, Lost, or Canceled**

Activities

An essential part of the customer relations management functionality is the ability to create activities to schedule for business objects (business partners, contacts, opportunities, or other activities), and to track the progress of these activities.

An activity is an appointment, call, task, mailing, or e-mail that must be created or executed by a user and that is registered in LN. Activities include, for example, phone calls, mailings, visits, and surveys. Optionally, tasks, appointments, and calls can be synchronized with Microsoft Exchange.

In the Activities (tccom6100m000) session, activities can be created and linked to business objects. Activities can be manually created or automatically generated.

Manual creation of activities

In the Activities (tccom6100m000) session, you can manually create these activities:

- **Appointments**
Click **New Appointment** to enter an appointment in the Appointment (tccom6600m100) session.
- **Calls**
Click **New Call** to enter a call in the Call (tccom6600m200) session.
- **Tasks**
Click **New Task** to enter a task in the Task (tccom6600m300) session.
- **E-mails**
Click **New Email** to enter an e-mail in the Email (tccom6600m500) session.

Note

The Activities (tccom6100m000) session can be started stand-alone, but also appears as a tab in these sessions:

- Business Partner (tccom4100s000)
- Opportunity (tdsmi1610m000)
- Contact (tccom1640m000)
- Activities (tccom6100m000)

Follow-up activities

An activity can also result in another activity. Therefore, from an appointment, call, task, mailing, or e-mail, follow-up activities can be created of the types **Call, Task, Appointment, and Email**.

In one of the activities sessions, you can manually create these follow-up activities:

- **Follow-up appointment**
Click **Follow Up Appointment** to enter a follow-up appointment in the Appointment (tccom6600m100) session.
- **Follow-up call**
Click **Follow Up Call** to enter a follow-up call in the Call (tccom6600m200) session.
- **Follow-up task**
Click **Follow Up Task** to enter a follow-up task in the Task (tccom6600m300) session.
- **Follow-up e-mail**
Click **Follow Up Email** to enter a follow-up e-mail in the Email (tccom6600m500) session.

Note

If an activity is generated from another activity:

- The **Contact**, **Business Partner**, and **Business Object** references are copied to the new activity.
- A reference to the original activity is specified in the new activity. You can update all references in the follow-up activity, except for the reference to the original activity.
- The attendees or recipients of the original activity are copied to the new activity.

Automatic generation of activities

In the Global Addition of Activities (tdsmi2210m100) session, you can globally add activities to multiple business partners, opportunities, and so on, at one time.

Based on an activity template, which you can define in the Activity Templates (tdsmi0155m000) session, you can automatically generate these activities:

- Tasks from the Global Addition of Activities (tdsmi2210m100) session.
- Mailings from the Mail Merge by Standard Letter (tdsmi2410m000) session. You can view the generated mailing in the Mailing (tccom6600m400) session.

Link to activities

The following can be linked to an activity:

- **Attributes**
You can link attributes to an activity in the Attributes by Activity (tdsmi2101m000) session, which appears as a tab in most activity sessions. For example, the activity is a survey, and the questions to be asked to the business partner are created as attributes and linked to the activity. When employees perform this activity, they open the attributes fields and enter the answers to the survey in the attributes fields as they obtain the information over the phone.
- **Notes**
You can link notes to an activity in the Notes (tcstl1550m000) session, which appears as a tab in all activity sessions.

- **References**

You can link references to an activity in the References by Activity (tccom6115m000) session, which appears as a tab in all activity sessions.

- **Attendees**

You can invite attendees to a call or an appointment in the Attendee (tccom6105m000) session, which appears as a tab in the Call (tccom6600m200) and Appointment (tccom6600m100) sessions. If the **Synchronize** check box is selected in these sessions, calls and appointments are synchronized with an attendee's calendar events in Microsoft Exchange.

- **Recipients**

You can select recipients for an e-mail in the Recipients (tccom6600m900) session, which can be started from the Email (tccom6600m500) session.

- **Attachments**

You can link attachments to an e-mail in the Attachments (tccom6110m000) session, which can be started from the Email (tccom6600m500) session.

Letters

Letters to business partners and mass mailings are common marketing activities. In CRM, you can create, save, and modify letters. You can use the mail merge functionality to print a generic letter that contains specific business partner information. You can export letters to other word processing programs to use functionality such as spell checkers.

The procedure to create and print letters includes the following steps:

Step 1: To create letters

In the Letters (tdsmi1150m000) session, you can create letters to send to business partners. You can create the letters in a generic format, which you can merge later with specific business partner information.

You can use a text editor to define the actual body of the letter. For more information, refer to *CRM – Text Editor* (p. 31).

Step 2: To use mail merge

In the Mail Merge by Standard Letter (tdsmi2410m000) session, you can print or process letters for business partners (prospects or customers), opportunities, contacts, or activities. You can specify a range of data that must be printed in the mail merge.

Selection expressions

A selection expression enables a user to define search criteria to create a target group. This target group can be used to specify who to include in a particular action. Selection expressions are used to create targeted ranges for opportunities, global additions of attributes and activities, letters (mail merges), and reports. Selection expressions are similar to targeting criteria used in spreadsheet and database programs, such as Microsoft Excel.

Selection expressions are created in the Selections (tdsmi0170m000) session after which they are used for letters, reports, and so on. They can be simple or complex, which depends on the criteria used. You can use a text editor to define the expressions. For more information, refer to *CRM – Text Editor* (p. 31).

Example

A company has created an attribute to attach to their business partners that lists the date on which the business partners became a business partner. A selection expression can be created to find the business partners who became a business partner during the last 45 days. The selection expression can use the attribute to come up with that target group. The company also uses phases to track the progress they made with their business partners. One phase indicates that the business partner requires extra information. The selection expression can use that phase to target the business partners that the company must call or send information.

The Selections (tdsmi0170m000) session lists the codes and descriptions of the selections defined by the users. Check boxes indicate if text is present for a selection or if an expression is defined for a selection. Both text and expressions are created by means of the text functionality on the **Edit** menu. On the appropriate menu, you can select **Compile Expression** to check the syntax of the selection expression. This is not mandatory, but you can use this option as a precaution.

Reports

You can define reports to view user-defined data. The information included in a report is determined by various criteria. In CRM, you can create reports to view data based on your requirements.

The procedure to define reports includes the following steps:

Step 1: To define a report

To create a report, you must first define a code, a description, and some general header and footer information in the Reports (tdsmi0180s000) session.

Step 2: To create report layouts

The column definitions, which indicate the information that must be included in the report columns, are defined in the Report Layouts (tdsmi0181s000) session. This information can include table fields or attributes.

Step 3: To print reports

In the Flexible Printing (tdsmi2410m100) session, you can print and process the reports defined in CRM.

Customer 360

In a company, account managers are responsible for maintaining relations with sold-to business partners, also referred to as accounts, or trade relations. They spend a lot of time on handling business partner

requests and proposals. As a result, they must have a good insight in the status of the sold-to business partners they are responsible for.

The Customer 360 (tdsmi1500m000) session provides an overview of sold-to business partner information and enables an account manager to easily perform multiple business partner-related tasks. With this session, account managers are supported in their daily tasks of handling business partner requests and proposals in a flexible and correct way.

Note

If you click the **Apply Filter** button, only the business partners that are relevant for the specific account manager are displayed.

CRM – Text Editor

If you create a letter or a selection expression, you can use the Text Editor to specify the actual layout of the letter or to specify an expression.

Note

- You can specify letters in the Letters (tdsmi1150m000) session.
- You can specify selection expression in the Selections (tdsmi0170m000) session

Using the text editor

The layout of a letter or a selection expression can be very simple or quite complex. It can contain the following data:

- **Normal text**
For example, "We are excited...". You can use special characters like ö or é but it is not possible to use print effects such as bold, underscore, and different fonts.
- **Table fields**
You can use all table fields recorded in the Tables to be Displayed in CRM (tdsmi0182m000) session, such as tcom100.nama (the business partner's name).
- **Attributes**
You can use all attributes recorded in the Attributes (tdsmi0550m000) session. For more information, refer to *CRM – attributes in the Text Editor (p. 36)*.
- **Predefined variables**
For example, @today (gives current date). For more information, refer to *CRM – predefined variables in the Text Editor (p. 38)*.

It is recommended that you zoom and select table fields and attributes rather than entering them, because you are less likely to make mistakes by selecting them. On the **Options** menu of the Text Editor, click **Start Zoomsession** to retrieve the required table fields or attributes.

Note

Any text that you type after the pipe (|) symbol is not used as programming code, but is merely used as additional information for the user.

Operators in the Text Editor

You can use arithmetic, logical, or relational operators in the Text Editor.

Arithmetic operators

*	multiplication
---	----------------

/	division
---	----------

+	addition
---	----------

-	subtraction
---	-------------

¥	remainder after division
---	--------------------------

&	linking strings (alphanumerical arrays)
---	---

Logical operators

or

and

not (negation)

Relational operators

=	equal to
---	----------

<>	unequal to
----	------------

>	greater than
---	--------------

<	less than
---	-----------

>=	greater than or equal to
----	--------------------------

<=	less than or equal to
----	-----------------------

Functions in the Text Editor

You can use the following functions in the Text Editor:

- Arithmetic
- Trigonometric
- Logarithmic
- String
- Date

Arithmetic functions**Example**

round (X,Y,Z)	produces rounded value of X Y is number of decimals Z is rounding method (0 = down, 1 = normal, 2 = up)	-
val (A)	produces numeric value of string A	val ("8.7") = 8.7
abs (X)	calculates absolute value of X	abs (-10.3) = 10.3
int (X)	produces integer value of X	int (11.6) = 11
pow (X, Y)	raises X to the power of Y	pow (10.2) = 100
sqrt (X)	produces square root of X	sqrt (16) = 4
min (X, Y)	produces smallest value of X and Y	min (6, 10) = 6
max (X, Y)	produces largest value of X and Y	max (6, 10) = 10
pi	constant with value pi (3.1415926)	-

Trigonometric functions

sin (X), cos (X), tan (X)	produces sine, cosine, or tangent of X
asin (X), acos (X), atan (X)	produces arc sine, cosine, or tangent of X
hsin (X), hcos (X), htan (X)	produces hyperbolic sine, cosine, or tangent of X

Logarithmic functions

exp (X)	raises e to the power of X
log (X)	produces natural logarithm of X on the basis of e

log10 (X)	produces logarithmic value of X on the basis of powers of 10
-----------	--

String functions	Example
edit (X,Y)	formats numeric value X according to format Y edit (10.3, "ZZZ9V,99") = " 10,30"
str (X)	puts numeric value in string str (10.3) = "10.3"
len (X)	produces length of string X len ("abc") = 3
strip (X)	deletes spaces after last character strip ("A ") = "A"
pos (X,Y)	produces position of string Y in string - X from left
rpos (X,Y)	produces position of string Y in string - X from right

Date functions	Example
date ()	produces current date -
date (YYYY, MM, DD)	produces date according to specified year (YYYY), month (MM), and day (DD) date (2008, 5, 1) = 1 May 2008

CRM – attributes in the Text Editor

If you use the Text Editor to define the layout of a letter or to create a selection expression, you can retrieve attributes. To select an attribute, on the **Options** menu of the Text Editor, click **Start Zoomsession**.

General notation of an attribute

Types of attributes

- **R**
The attribute is associated with a customer or prospect.
- **P**
The attribute is associated with an opportunity.
- **C**
The attribute is associated with a contact.
- **A**
The attribute is associated with an activity.

The general notation of an attribute is as follows: [X, attribute].

The X stands for (R, P, C, or A). The retrieved attribute is always the attribute for a relation (R). If you wish to assign the attribute to a contact, you must change the "R" into "C", and so on.

Attribute variables

If you want to use attributes in a predefined report, you can use the following variables (arrays):

- **label.data**
In this array all labels (descriptions) of the attribute are stored. The length of a label is 40 characters, up to 25 labels.
- **attribute.data**
In this array all values (alphanumeric) are stored (up to 25).
- **attribute.text**
In this array all text numbers are recorded (up to 10), which can now be printed.

Example

Activity 'Visit' has three attributes:

Type of atmosphere	friendly, normal, hostile
Start of appointment	early, on time, late
End of appointment	early, on time, late

Attribute two has a text linked to it.

The following can be printed:

tdsmi200.cact tdsmi200.dsca

label.data (1) : attribute.data (1)

label.data (2) : attribute.data (2)

label.data (3) : attribute.data (3)

Text label.data (2)

attribute.text (2)

CRM – predefined variables in the Text Editor

If you use the Text Editor to define the layout of a letter or to create a selection expression, you can use predefined variables.

General predefined variables for business partners/opportunities/contacts/activities

Within order documents, addresses are stripped off empty fields. Such a stripped address is available by using the following fields:

cor.nama	First field of Postal Address
cor.namb	Second field of Postal Address
cor.namc	Third field of Postal Address
cor.namd	Fourth field of Postal Address
cor.name	Fifth field of Postal Address
cor.namf	Sixth field of Postal Address
cor.ccty.dsca	Description of Postal Address Country
del.nama	First field of Delivery Address
del.namb	Second field of Delivery Address
del.namc	Third field of Delivery Address
del.namd	Fourth field of Delivery Address
del.name	Fifth field of Delivery Address
del.namf	Sixth field of Delivery Address
del.ccty.dsca	Description of Delivery Address Country
pad.nama	First field of Private Address
pad.namb	Second field of Private Address
pad.namc	Third field of Private Address
pad.namd	Fourth field of Private Address
pad.name	Fifth field of Private Address
pad.namf	Sixth field of Private Address
pad.ccty.dsca	Description of Private Address Country

Predefined variables for business partners

pldd_mcs034.dsca	Description of Price List
pcpr_com010.nama	Name of Parent Customer for Prices/Discounts
pctx_com010.nama	Name of Parent Customer for Texts
pctf_com010.nama	Name of Parent Customer for Finance
ccus_com010.nama	Name of Parent Customer for Statistics Update
iscn_com000.nama	Name 1 of Affiliated Company
iscn_com000.namb	Name 2 of Affiliated Company
iscn_com000.namc	Address 1 of Affiliated Company
iscn_com000.namd	Address 2 of Affiliated Company
iscn_com000.name	City 1 of Affiliated Company
iscn_com000.namf	City 2 of Affiliated Company
iscn_com000.pstc	ZIP Code of Affiliated Company

Predefined variables for opportunities

mprj_com001.nama	Name of Assigned To
mprj_com012.nama	Name A of Postal Address
mprj_com012.namb	Name B of Postal Address
mprj_com012.namc	Address A of Postal Address
mprj_com012.namd	Address B of Postal Address

mprj_com012.name	City A of Postal Address
mprj_com012.namf	City B of Postal Address
mprj_com012.pstc	ZIP Code of Postal Address

Predefined variables for contacts

cper_mcs122.dsca	Description of Attention
cper_mcs046.dsca	Description of Language
cper_mcs019.dsca	Description of Title
wadr_com012.nama	Name A of Work Address
wadr_com012.namb	Name B of Work Address
wadr_com012.namc	Address A of Work Address
wadr_com012.namd	Address B of Work Address
wadr_com012.name	City A of Work Address
wadr_com012.namf	City B of Work Address
wadr_com012.pstc	ZIP Code of Work Address
padr_com012.nama	Name A of Private Address
padr_com012.namb	Name B of Private Address
padr_com012.namc	Address A of Private Address
padr_com012.namd	Address B of Private Address
padr_com012.name	City A of Private Address
padr_com012.namf	City B of Private Address

padr_com012.pstc	ZIP Code of Private Address
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Predefined variables for activities

acti_smi002.dsca	Description of Source
acti_smi003.dsca	Description of Phase
acti_smi004.dsca	Description of Jobtitle
acti_smi006.dsca	Description of Attention
empl_com001.nama	Name of Employee
crep_com001.nama	Name of Sales Representative

Predefined variable for selection expressions

bp.turnover.previous.year	The turnover from the Invoice-to Business Partner Balances (tccom4513s000) session. This value represents last year's turnover for all departments that belong to the financial company of: ■ The sales office that is linked to the business partner. ■ The current logistic company if this company is also a financial company and no sales office is linked to the business partner.
---------------------------	--

Example

bp.turnover.previous.year < 15000.00 and bp.turnover.previous.year > 0.0

Based on the selection expression, business partners that match the turnover criteria can be retrieved in the Mail Merge by Standard Letter (tdsmi2410m000) and Flexible Printing (tdsmi2410m100) sessions. You can, for example, send a letter to all business partners with a turnover value below 15000 and above 0.

The following limitations apply to the turnover:

- The turnover value of only one financial company is calculated. Turnover of multiple financial companies are not totalized.

- For a business partner, only one record can be retrieved from the Invoice-to Business Partner Balances (tccom4513s000) session.

CRM – examples of selection expressions

If you create a selection expression in the Selections (tdsmi0170m000) session, you use the Text Editor to create an expression.

Examples of alphanumeric expressions

(R, color) = "red"	attribute is alphanumeric
--------------------	---------------------------

tccom100.bpid = "JOHNSON"	table field is alphanumeric
---------------------------	-----------------------------

(R, contents) = 1	attribute is numeric
-------------------	----------------------

tccom110.umsp = 2	table field is numeric
-------------------	------------------------

(R, contents) IN (10,100) (110,200)

The value of the attribute must be greater than or equal to 10 and less than or equal to 100 OR greater than or equal to 110 and less than or equal to 200.

Examples of string expressions

^	beginning of the string
\$	end of the string
.	any character
*	0 or more times the previous character
()	one of the characters between (), e.g. (abcd123) or (a-z)
(^)	any sign other than, e.g. (^XYZ0-9)
""	double quote within a string

Examples

- "abcdefg" IN "def" = TRUE
- "abcdefg" IN "^def\$" = FALSE
- "abcdefg" IN "^a" = TRUE
- "abcdefg" IN "^b" = FALSE
- "abcdefg" IN "g\$" = TRUE

Alternative: (R,...) IN "abcde"

Meaning: all attributes are checked for the presence of the string "abcde"

Priority in expressions

Arithmetic operators have a higher priority than relational operators. The latter have a higher priority than logical operators.

The priority sequence for arithmetic operators is: * / % + -

The priority sequence for logical operators is: not and or

Round brackets ("()") can be used to change the priority sequence for arithmetic and logical operators. For example, $3 + 4 * 5 = 23$ and $(3 + 4) * 5 = 35$

Synchronizing CRM contacts and activities to Microsoft Exchange

CRM offers the following synchronization functionality:

- Contacts from LN can be synchronized to Microsoft Exchange.
- Activities with the **Call** or **Appointment** types can be synchronized as calendar events between LN and Microsoft Exchange. Calendars are synchronized in both directions.

Synchronization parameters and master data

Before you can synchronize contacts and activities, you must first define the following parameters and master data:

- Select the **Synchronize Contacts** check box in the COM Parameters (tccom0000s000) session if you want to enable contact synchronization. If this check box is selected, you must also specify ISO codes in the Countries (tcmcs0510m000) and Languages (tcmcs0146m000) sessions.
- Select the **Synchronize Activities** check box in the COM Parameters (tccom0000s000) session if you want to enable calendar synchronization.
- Configure the Exchange Synchronizer in the MS Exchange Synchronization Settings (ttaad2140m000) session.
- Specify the users that require synchronization of their contacts and calendars in the MS Exchange Synchronization Users (ttaad2141m000) session.

Note

To synchronize activities for attendees of the **Employee** type, who are specified in the Attendee (tccom6105m000) session, the following must be applicable for the employee:

- The **User** field is specified in the Employees - General (tccom0101m000) session.

- The **E-Mail** field is specified in the Employees - People (bpmdm0101m000) session. The e-mail address must be identical, including upper and lower case characters, to the e-mail address defined in the Windows domain.
- The **Email Address** in the MS Exchange Synchronization Users (ttaad2141m000) session is equal to the **E-Mail** field in the Employees - People (bpmdm0101m000) session. The e-mail address must be identical, including upper and lower case characters, to the e-mail address defined in the Windows domain.

Invitations to an activity can only be sent to the attendees' calendars if the activity's **Meeting Organizer**, as specified in the Attendee (tccom6105m000) session, is also defined in the MS Exchange Synchronization Users (ttaad2141m000) session. The reason for this is that MS Exchange generates the invitations for the organizer.

Synchronization of contacts and activities

In the LN UI Administration Webapp, the Exchange Synchronizer can be started and terminated for an LN CRM environment.

When the Exchange Synchronizer is started, these steps are completed:

1. The Synchronizer connects to LN.
2. The settings defined in the MS Exchange Synchronization Settings (ttaad2140m000) and MS Exchange Synchronization Users (ttaad2141m000) sessions are sent to the Synchronizer.
3. The Synchronizer starts the synchronization of contacts and activities.

For more information, refer to *Infor LN UI Administration Guide*.

Synchronizing contacts

Contacts from LN are synchronized to Microsoft Exchange through a pull mechanism. The Synchronizer is triggered through a pull interval. This interval consists of a number and a time unit, such as 1 hour or 7 days. When triggered, for each user that requires synchronization, the Synchronizer retrieves contacts from LN that have the **Synchronize** check box selected in the Contact (tccom1640m000) session and have changed since the last synchronization run. These contacts are synchronized to Microsoft Exchange.

Synchronizing calendars

Calendars are also synchronized using a pull mechanism that is based on a pull interval. When triggered, for each user that requires synchronization, the Synchronizer retrieves all calendar events from both LN and Microsoft Exchange that are in the present or future. The Synchronizer will not use the pull mechanism to synchronize events that are in the past.

Calendar event originates from LN

For activities that are created in LN and that must be synchronized, the following check boxes are selected in the Activities (tccom6100m000) session:

- **Created by Infor LN**

■ Synchronize

When triggered, the Synchronizer synchronizes the calendars for the attendees that are linked to the activity and have the **Invite** check box selected in the Attendee (tccom6105m000) session.

Note

If the calendar event does not exist yet in Microsoft Exchange, the **Synchronized** check box is cleared, but the **Sent to Synchronizer** check box is selected in the Attendee (tccom6105m000) session.

When the calendar event is created for the attendee in Microsoft Exchange, the **Synchronized** check box is selected in the Attendee (tccom6105m000) session.

Calendar event originates from Microsoft Exchange

Calendar events that are created in Microsoft Exchange and that must be synchronized to LN, but that do not exist yet in LN, must also be created in LN. Therefore, in the Appointment (tccom6600m100) session, the calendar event is created as an activity of the type **Appointment** to which attendees are linked.

The following are applicable to the generated appointment:

- In the Activities (tccom6100m000) session, the **Created by Infor LN** check box is cleared and the **Synchronize** check box is selected.
- The e-mail address of a user that requires synchronization, determines whether an attendee is set to **Employee**, **Contact** or **Other** in the Attendee (tccom6105m000) session.
- The **Synchronized** check box is selected and the **Sent to Synchronizer** check box is cleared in the Attendee (tccom6105m000) session.

Note

Besides the pull mechanism, the calendar synchronization also supports the push notification mechanism. If the **Enable push synchronization** check box is selected in the MS Exchange Synchronization Settings (ttaad2140m000) session, when a calendar event is created, modified, or deleted in Microsoft Exchange or LN, a push notification is sent to the Synchronizer. This notification triggers the synchronization of the involved calendar event.

Appendix A

Glossary

A

account manager

The manager who is responsible for maintaining relations with accounts, or business partners.

activity

An appointment, call, task, mailing, or e-mail that is registered in LN and that can be linked to, for example, a contact, a business partner, or an opportunity. Optionally, tasks, appointments, and calls can be synchronized with desktop applications.

activity template

The definition of a standard activity. As the data to be recorded can vary from one activity to another, you can link a separate attribute set to each activity template. An activity template can be used as a basis for creating tasks and mailings.

address

A full set of address-related details, which include the postal address, access to telephone, fax, telex numbers, and e-mail, Internet address, identification for taxation purposes, and routing information.

address format

The definition of how the address data is printed on a report or document. You can define which data must be printed on each line of the address, in which order, and which fields must be skipped if there is not enough space.

appointment

An activity type that specifies an appointment scheduled for a contact, business partner, opportunity, or activity that you want to track through completion. An appointment has invited attendees.

appropriate menu

Commands are distributed across the **Views**, **References**, and **Actions** menus, or displayed as buttons. In previous LN and Web UI releases, these commands are located in the *Specific* menu.

attention code

The messages linked to business partners, opportunities, and so on that draw your attention to special events or circumstances.

attribute

Used to record distinctive information on (potential) business partners, contacts, opportunities, or activities and to segment data when specifying a batch selection for generating activities, mail merge (letters), or flexible reports.

Example

Attribute	Description	Type	Details
sf	Is the person a soccer fan?	Option	Options are Yes and No; default is No
fc	Favorite soccer club	Alphanumeric	Default is <blank>
conv	How did you value this conversation?	Alphanumeric	No defaults
ccb	Can I call you back next week?	Option	Options are Yes and No; default is No
lunch	Should bring own lunch	Option	Options are Yes and No; default is No
dressc	What is the dress code?	Option	Options are formal and casual (default)
comp	Main competitor	Alphanumeric	No defaults
terr	Territory	Option	Options are East and West

Attribute set	Description	Attributes
CON	Default attribute set for contacts	sf, fc
BP	Default attribute set for business partners	sf, fc
CALL	Default attribute set for calls	conv, ccb
APP	Default attribute set for ap- lunch, dressc pointments	
OPP	Default attribute set for op- comp, terr portunities	

attribute set

A set used to group related attributes.

Example

Attribute	Description	Type	Details
sf	Is the person a soccer fan?	Option	Options are Yes and No; default is No
fc	Favorite soccer club	Alphanumeric	Default is <blank>
conv	How did you value this conversation?	Alphanumeric	No defaults
ccb	Can I call you back next week?	Option	Options are Yes and No; default is No
lunch	Should bring own lunch	Option	Options are Yes and No; default is No
dressc	What is the dress code?	Option	Options are formal and casual (default)
comp	Main competitor	Alphanumeric	No defaults
terr	Territory	Option	Options are East and West

Attribute set	Description	Attributes
CON	Default attribute set for contacts	sf, fc
BP	Default attribute set for business partners	sf, fc
CALL	Default attribute set for calls	conv, ccb
APP	Default attribute set for ap- lunch, dressc pointments	
OPP	Default attribute set for op- comp, terr portunities	

business partner

A party with whom you carry out business transactions, for example, a customer or a supplier. You can also define departments within your organization that act as customers or suppliers to your own department as business partners.

The business partner definition includes:

- The organization's name and main address.
- The language and currency used.
- Taxation and legal identification data.

You address the business partner in the person of the business partner's contact. The business partner's status determines if you can carry out transactions. The transactions type (sales orders, invoices, payments, shipments) is defined by the business partner's role.

business partner role

Indicates the relationship between your organization and the business partner. The role defines the types of transactions you can carry out with the business partner. The business partners with different roles are linked by a common parent business-partner.

Examples of business-partner roles:

- Sold-to business partner
- Pay-by business partner

buyer role

A classification of a contact's role in the decision making process related to an opportunity. With this classification, sales representatives know, for example, how to approach a contact to win a deal.

A buyer role can be, for example, economic buyer, decision maker, influencer.

call

An activity type that specifies a call scheduled for a contact, business partner, opportunity, or activity that you want to track through completion. A call has invited attendees.

contact

The person with whom you discuss business transactions. For example, you address questions, quotations, and follow-up calls, direct mail, and promotional gifts to the contact. The contact's data include the name, telephone number, e-mail address, and other details.

e-mail

An activity type that specifies an e-mail created for a contact, business partner, opportunity, or activity that you want to record in LN. E-mails can be created to send them, but also to manually register received e-mails. An e-mail has selected recipients.

employee

A person who works at your company who has a specific function such as sales representative, production planner, buyer, or credit analyst.

industry code

The codes that classify business partners by type of business based on a code list, as determined by the government authorities. These codes can be used to segment customers for territory management and campaigns. Examples of industry coding systems are: SIC (Standard Industrial Classification) and NAICS (North American Industry Classification System).

ISO code

A code from a coding standard set up by the International Organization for Standardization. These standards and codes are internationally accepted. For example, codes for the representation of names of languages (ISO 639.2), codes for the representation of names of countries and their subdivisions (ISO 3166), and so on.

mailing

An activity type that specifies a standard letter printed for a contact, business partner, opportunity, or activity with specific business object information merged in. A mailing is always generated from an activity template.

note

A text comment with log information, which can be linked to an object.

Multiple notes can be linked to an object.

number group

A group of first free number series that you can assign to a specific use.

For example, you can assign a number group to:

- Business partner codes
- Purchase contracts
- Sales orders
- Production orders
- Service orders
- Warehousing orders
- Freight orders

Within a number group you can define multiple series. Each series is identified by the series code. The series numbers that LN generates consist of the series code followed by the first free number in the series. Series codes of the same number group have the same length.

opportunity

Used by a sales person to record and monitor sales information related to a business partner with the purpose of selling a product or service to this business partner.

opportunity type

A way to classify opportunities with similar characteristics for sorting and selecting purposes.

peg

A combination of project/budget, element and/or activity, which is used to identify costs, demand, and supply for a project.

phase

The identification of a stage or phase in the sales process. For example, analysis, proposal, negotiation, and so on.

promotion

The application of an additional discount, value off, or premium to a sales order based on predefined order levels of selected items. Two basic types of promotions exist: order level and line level.

quotation lines

The lines used to record the items offered, as well as the associated price agreements and quantities. A sales quotation includes one or more quotation lines.

sales process

A standard sales methodology that must be followed when working on an opportunity. A sales process is split up in phases.

sales quotations

A statement of price, the terms of sale, and a description of goods or services offered by a supplier to a prospective purchaser; a bid. The customer data, payment terms, and delivery terms are contained in the header; the data about the actual items is entered on the quotation lines. When given in response to a request for quotation, a bid is usually considered an offer to sell.

sales representative

An employee of your company who maintains contact with the sold-to business partner. The employee number of the sales representative is also used as a sorting criterion in the sales statistics.

salutations

The phrase used to address the recipient of a letter. For instance: Dear Sir, Miss, or To the Board of Directors.

series

A group of order numbers or document numbers starting with the same series code.

Series identify orders with certain characteristics. For example, all sales orders handled by the large accounts department start with LA (LA0000001, LA0000002, LA0000003, and so on).

source

The places, events, or methods where or through which business partners come in contact with your company (for example, a trade fair or an advertisement).

task

An activity type that specifies an action to be executed for a contact, business partner, opportunity, or activity that you want to track through completion.

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