



Infor LN CRM User Guide for CRM

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About this Guide

This document describes the process to set up and use Customer Relationship Management (CRM) for supporting the marketing and sales of a product.

Assumed knowledge

Although you need no detailed knowledge of the LN software to read this guide, general knowledge of the LN functionality will help you understand this guide.

Document summary

Use this guide as the primary reference for CRM. Use the current editions of these related references to research information that is not covered in this guide:

- *User Guide for Sales Quotations*
- *User Guide for Sales Orders*

How to read this document

This document is assembled from online Help topics. Text in italics followed by a page number represents a hyperlink to another section in this document.

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Chapter 1: CRM

CRM – overview

To remain competitive and profitable, it is essential for a company to identify, communicate, and track the requirements of a business partner. Customer Relationship Management (CRM) enables you to create, record, and track sales and marketing data in a flexible way. Using CRM, you can maintain information on prospective business partners as well as additional information on current business partners. Users can also 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 that must be followed. All the information is optional, which gives a free flow to use the data.

CRM master data

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

For more information, refer to CRM – master data.

CRM functionality

You can use CRM to execute the following:

- Carry out opportunities.
- Define activities.
- Create letters.
- Create selection expressions.
- Create reports.

For more information, refer to CRM – functionality.

CRM - Text Editor

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

If you create selection expressions, you use the Text Editor to create expressions.

For more information, refer to CRM – Text Editor.

Synchronize CRM contacts and activities to Microsoft Exchange

Contacts from LN can be synchronized to Microsoft Exchange.

Activities of the type **Call** and **Appointment** 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.

Chapter 2: Master data

CRM – master data

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

- [CRM parameters](#) on page 8 The parameters for customer relations management.
- [Addresses](#) on page 8 The definition of addresses and address formats.
- [Business partners, contacts, and employees](#) on page 9 The sessions for working with business partners, contacts, and employees.
- [Optional sessions](#) on page 9 The sessions with basic customer relation management information.
- CRM – 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.
- 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 across 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:

- *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 the Default Attribute Set for:

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

For more information, refer to:

- Addresses (tccom4530m000)
- Defining address formats
- Using address formats

Business partners, contacts, and employees

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

- Business partnersBusiness Partner (tccom4100s000)
- ContactsContact (tccom1640m000)
- EmployeesEmployees - General (tccom0101m000)

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.

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.

State or province abbreviations

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.

Addresses 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 (tccom4538m000)** 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 can specify address formats in the **Address Formats (tccom4135s000)** 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

Address Format	Line	Sequence	Priority	Space
P.O. Box	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 five lines are 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 (tcpcs0110s000)** 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.

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.

Complete these steps to set up and use business partner default data:

- 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.

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

In the **Business Partner Defaults** field, select the required set of default business partner data.

In the **Business Partner Role** field, the business partner role type of the selected set of default data is specified by default. If required, you can overrule the default value.

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

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

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

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

These roles are financial roles:

- **Invoice To**
- **Pay By**
- **Invoice From**
- **Pay To**

You can only select the financial roles if these conditions apply:

- The **Financial Roles** check box is selected for the supplier in the **Business Partner Defaults (tccom4101m000)** session.
- You are working in a company of type **Financial** or type **Both**. See Business partner data by financial company Financial business-partner data.

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

- 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.
- 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.

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 specify 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 specify whether the contact is the primary contact for a business partner role.

If a contact represents the business partner in a specific role, the contact is displayed on the **Contacts** tab of the relevant business partner session. The **Contacts** tab refers to the **Contacts by Business Partner Role (tccom4545m000)** session and is included 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 – attributes

Attributes are 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.

You can link *attributes* to these business objects:

- Business partners
- Contacts
- Opportunities
- Activities

To specify attributes and attribute sets:

1 Create attributes

Create attributes in the Attributes (tdsmi0550m000) session.

Notes

- The fields on the **Reference** tab are optional.
- Attributes are 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.
- If an attribute is of the **option** type, specify the options in the Options by Attribute (tdsmi0151m000) session.

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*.

3 Link attributes to attribute sets

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

Attribute sets can be added to these sessions:

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

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 etc. in the Global Addition of Attributes (tdsmi2210m000) session.
- By globally adding *activities* to multiple business partners, opportunities etc. 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 these 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.

5 Specify values for attributes

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

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

Example

- **Attribute linked to a business partner**
A company decides to check if 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 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.

Chapter 3: Marketing, Sales, and Utilities

CRM – functionality

CRM you can work with this functionality:

- Opportunities
- Activities
- Letters, selection expressions, and reports

Note: *Account managers* can use the Customer 360 (tdsmi1500m000) session to have an overview of business partner information and to centrally perform multiple business partner-related tasks.

Opportunities in CRM

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:

- Assign and reassign an opportunity to a *sales representative*.
- Maintain the progress of an opportunity. You can update the *phase* of the *sales process* and assign 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 is used to display who to contact at the business partner for this opportunity.
- 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.
- Add items to an opportunity in the Items by Opportunity (tdsmi1113m000) session, which you can offer as sales *quotation lines* to a business partner.

Sales quotation based on an opportunity

By generating a *sales quotation* from an opportunity, the opportunity is used as the basis for product offerings to a business partner. After items are added to an opportunity, *quotation lines* can be generated for the items.

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. Only items whose Select check box is selected are inserted as quotation lines on the sales quotation.
- Generate a sales quotation and quotation lines from the opportunity by clicking **Generate Quote** on the *appropriate* menu.

After the sales quotation is generated:

- The opportunity number is filled as a reference number in the **Opportunity** field of the **Sales Quotation (tdsls1600m000)** session. 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 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.
- And the opportunity's item has a linked *peg*, the peg is copied to the generated sales quotation line.

Note:

- If no items are linked to an opportunity, you can choose to only generate a sales quotation header and no quotation lines.
- You cannot generate a sales quotation from an opportunity if its **Status** is **Dead**, **Won**, **Lost**, or **Canceled**.

Activities in CRM

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 email 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.
- Emails

Click **New Email** to enter an *email* 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)**

Automatic generation of activities

In the Global Addition of Activities (tdsmi2210m100) session, you can globally add *activities* to multiple business partners, opportunities, etc.

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.

Note: Appointments can also be generated from *assignments* in Service and from *inspection order* lines or non-conformance material and *corrective action plan (CAP)* tasks in Quality.

Follow-up activities

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

In the activity 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 email
Click **Follow Up Email** to enter a follow-up email 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.

Additional functionality

- **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* using the Attendee (tccom6105m000) session, which is displayed 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 *email* in the Recipients (tccom6600m900) session, which can be started from the Email (tccom6600m500) session.
- **Attachments**
You can link attachments to an *email* in the Attachments (tccom6110m000) session, which can be started from the Email (tccom6600m500) session.

Letters, selection expressions, and reports in CRM

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.

To create and print letters:

- 1 In the Letters (tdsmi1150m000) session, 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.
- 2 In the Mail Merge by Standard Letter (tdsmi2410m000) session, 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 you 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, etc. They can be simple or complex, which depends on the criteria used. You can use a text editor to define the expressions.

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 using 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.

Example

A company 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.

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.

To specify reports:

- 1 Specify a code, a description, and some general header and footer information in the Reports (tdsmi0180s000) session.
- 2 Specify the column definitions, which indicate the information that must be included in the report columns, in the Report Layouts (tdsmi0181s000) session. This information can include table fields or attributes.
- 3 Print and process the reports in the Flexible Printing (tdsmi2410m100) session.

Chapter 4: Text editor

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 tccom100.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.
- Predefined variables
For example, @today (gives current date). For more information, refer to CRM – predefined variables in the Text Editor.

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

Arithmetic functions		Example
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, and activities

Within order documents, addresses are stripped off the empty 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

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	<p>The turnover from the Invoice-to Business Partner Balances (tccom4513s000) session.</p> <p>This value represents last year's turnover for all departments that belong to the financial company of:</p> <ul style="list-style-type: none"> • 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.
---------------------------	--

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.

Example

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

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

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

Chapter 5: Microsoft Exchange

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 email address must be identical, including upper and lower case characters, to the email 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 email address must be identical, including upper and lower case characters, to the email 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.

Exchange Synchronizer

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.

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.

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 email 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.

Appendix A: Graphs

Customer graphs

Graphs display different types of information about a customer.

In the **Graphs** group box of the Customer 360 (tdsmi1500m000) session, you can select these graphs:

- Delivery Performance
- Turnover
- Invoice Overdue

To display information for the selected graph, select a sold-to business partner from the business partner list in the **Customer 360 (tdsmi1500m000)** session.

Note: Administrators can personalize graphs in the Personalize Graphs on Sessions (ttadv9130m100) session.

Delivery Performance

This graph displays the percentage of sales order lines that are delivered on time in comparison with all sales order lines delivered to the business partner, for the last 12 months.

- Sales order lines are delivered on time if the planned delivery date equals the actual delivery date.
- Sales order lines that are partially delivered, are considered as delivered lines in this graph.

The monthly data is retrieved from the actual sales order line data (tdsls401).

Turnover

This graph displays the *turnover* for the selected sold-to business partner.

The information that is displayed, is based on this data:

- The last 5 years.
- The turnover in the Invoice-to Business Partner Balances (tccom4513s000) session.

Invoice Overdue

This graph displays the *open (receivable) balance* versus the *overdue invoice amount* for the sold-to business partner.

- The open balance is the sum of the Balance Receivable amounts in the Invoice-to Business Partner Balances (tccom4513s000) session.
- The overdue invoice amount is retrieved from the Sales Invoices (tfacr2522m000) session.

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