CHAPTER 12: DOCUMENT LOGGING

This chapter explains how to log and archive sales, purchase, and service documents while going through the sales or purchase process. This can be used to see the history of the sales process.

This chapter contains the following sections:

- Introduction
- Saving a Sales Quote
- Restoring a Sales Quote or Order
- Logging and Saving a Version of a Sales Order
- Restoring a Sales Order
- Exercises
- Solutions

Introduction

In the current release of Microsoft® Business Solutions–Navision® 4.0, the sales, purchase, and service documents are logged. This means that when you go through the sales and purchase process, and the documents change their nature, (for example, from a quote to an order), you have the possibility to save and log the documents.

This means that you can always go back to a previous version if the quote or order has been changed during the sales process.

Saving a Sales Quote

In order to keep track of the sales process, it is convenient to save versions of previous quotes. This can be done in the Sales Quote window (in Purchase, Order Processing, Quotes) by clicking FUNCTIONS→ARCHIVE DOCUMENT.

When you select this, you archive a copy of the sales quote in the archive file. If you want to revert to any archived copies, you click the **AssistButton** to the right of the **No. of Archived Versions** field, and the Sales List Archive window appears.
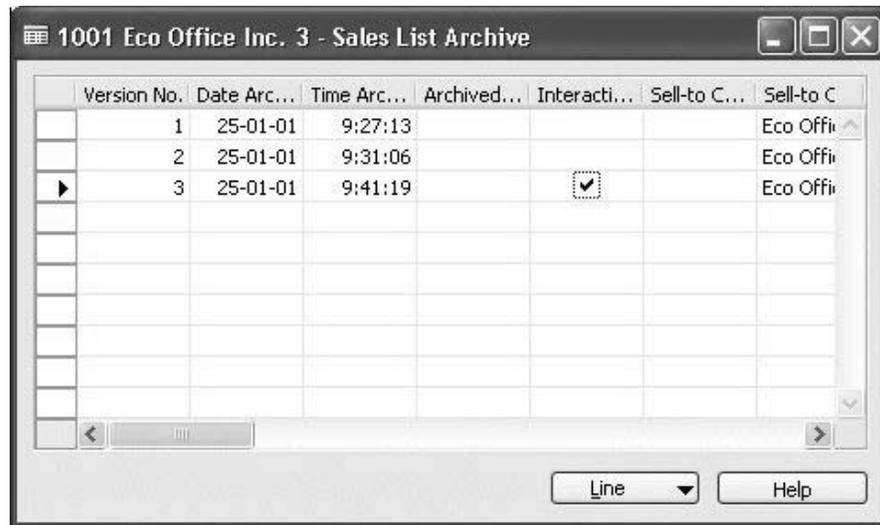
*NOTE: The figure in the **No. of Archived Versions** field indicates how many archived versions there are.*

If you want to look at any of the archived versions, select the version you want to look at, and click CINE→CARD; and the Sales Quote Archive window should appear:
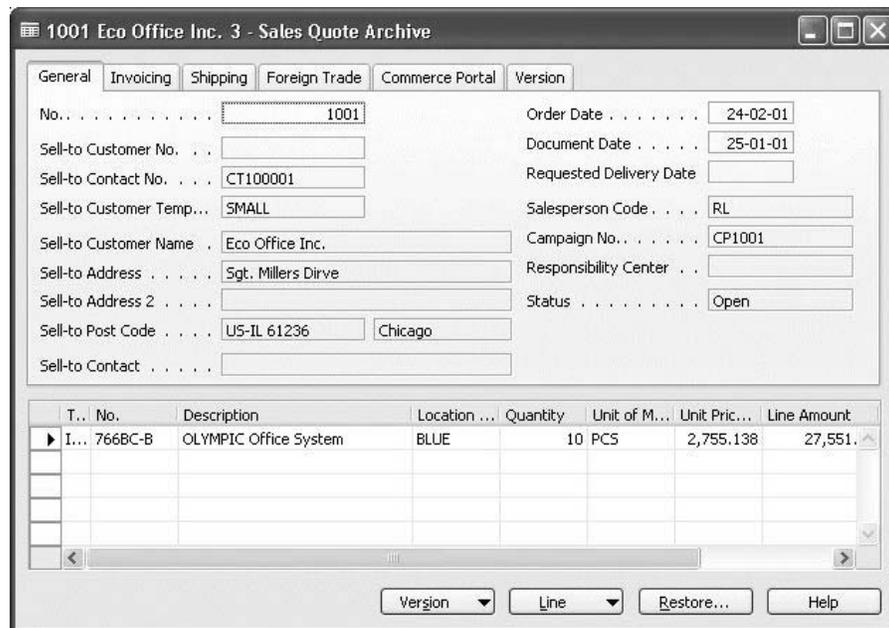
You can then restore any one of the archived versions by clicking the **Restore** button, and clicking **Yes** in the dialogue box that appears.

If you want to print the quote in order to check it, click **Print** in the Sales Quote window. On the **Options** tab, deselect the **Log Interaction** option because you do not want to make any kind of interaction with the customer.

You can see the Archive File by clicking the **AssistButton** to the right of the **No. of Archived Version** field.

Restoring a Sales Quote

You can restore an order created on the basis of a previous version of a sales quote. You can do this in two different ways:

Restoring a Sales Quote from the Contact Card

1. Click SALES & MARKETING→MARKETING→CONTACTS, and then select the Contact Card you want to view.

2. Click **Contact**, and select **Interaction Log Entries.** The Interaction Log Entries window appears.

3. Select the interaction log entry for the quote that you want to look at and click **Show**, and the saved version of the document appears.

4. Click Version, List to see a list of versions for this sales quote.

5. Select the relevant version, and click **OK**. The saved version appears. You can now click **Restore**, and click **Yes** in the dialog box that appears. Now the quote has been restored.

6. Press ESC to go back to the Contact Card.

7. Click **Contact**, and select the Sales Quote to view the restored quote version.

8. If you want to make the order, click **Make Order**. Now the order has been created on the basis of the restored, archived document.

Restoring a Sales Quote from the Quote Itself

1. Click PURCHASE→ORDER PROCESSING→QUOTES.

2. Find the relevant quote.

3. Click the **AssistButton** in the **No. of Archived Versions** field, and a list of the archived versions appears.

4. Select the version you want to look at, and click Line, Card.

5. Click **Restore**, and the quote has been restored.

   If you want to make the order, click **Make Order**. Now the order has been created.

Logging and Saving a Version of a Sales Order

When you have sent an order for confirmation, the program should be able to log this document and save a copy for future reference. This will enable you to track all versions of orders sent to the customer.

You do this in the same way as you have just done for quotes.

If you want to send the order to the customer, you click **Print**, and confirm that you have placed a checkmark in both the **Archive Document** field and the **Log Interaction** field. When you do this, you both archive the order and create an interaction log for the customer.

Restoring a Sales Order

If the customer wants an order on the basis of a previous version of the sales order, you can restore it.

You do this in the following way:

Restoring a Sales Order

1. In the Contact Card, click CONTACT→CUSTOMER/VENDOR/BANK ACC., to open the Customer Card of this contact.

2. Click SALES→ORDERS. The Sales Order window appears.

3. Click the **AssistButton** on the **No. of Archived Versions** field, and a list of the archived versions appears.

4. Select the version you want to look at, and click LINE→CARD.

5. Click **Restore**, and the order has been restored.

6. Print the order and send it to the customer.

Test Your Skills – Issuing a Quote to Contract

Scenario: You have received a phone call from Ergonomic Office Systems requesting a quote for office furniture.

1. Create a sales quote for Ergonomic Office Systems.

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

3. Send it by fax to Ergonomic Office Systems, and make sure that you create the log entry and save a copy of the quote in Microsoft Navision.

Test Your Skills – Restoring the Quote

Scenario: Two days later, the Purchase Manager from Ergonomic Office Systems calls and requests changes to the quote. He now wants to have two more items on the quote.

1. Open the quote, and change it to fit the new request.

2. Send the new quote with changes for confirmation, and save a copy.

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

1. Restore the previous quote.

2. Make the order from this quote.

Quick Interaction: Lessons Learned

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

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