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UF1: Sistemes ERP-CRM. Implantació.

NF2: Instal·lació ERP

EA4: Admin and configure Nav

Pràctica 2

Tasks:

From pdf “MODULE 2: USER INTERFACE” answer these questions:

1. What can you use the **Search** box for?
 - a. To find any page, report, or view present on the Departments page.
 - b. To find any page, report, or form present on the Departments page.
 - c. To find any page or report present on the Departments page.
 - d. To find any page, report, or view present on the Home page.

Answer: C) To find any page or report present on the Departments page.

2. Which of the following statements about the navigation pane is true?
 - a. You can remove the Home menu.
 - b. You cannot remove the Departments menu.
 - c. At a minimum, the navigation pane contains the Home and the Departments menu.

Answer: D) None of the above. You can not remove the Home menu, but you can remove the Departments menu.

3. Name some of the advantages of the ribbon?

Answer: Easier and faster access to your favourite or most common pages

4. Assign a Role Center:

Scenario

You are the accounting manager at CRONUS International Ltd., and uses the default Role Center (Sales Order Processor). However, this Role Center is not aligned with your daily activities. Therefore you are advised to use the accounting manager profile.

Assign the accounting manager profile to your user account.

Answer: At the search box, search for “user personalization”, double click on your user, and a pop-up will appear. On profile id., select “Accounting manager”

From pdf “MODULE 3: USER PERSONALIZATION” answer these scenarios:

1. Add a List Place to the Navigation Pane

Scenario

As the order processor at CRONUS International Ltd., you generally perform tasks in the sales order processes. Your profile has provided you with the corresponding available activity buttons in the navigation pane.

However, sometimes you have to perform some tasks outside your usual job description. You want to perform the following tasks from the navigation pane:

- Send out mailing lists, by using the Segments and Contacts of the Marketing application area.
- Process a Purchase Order, for the supply of office material or a specific order related to a sales order.
- Process and follow up on Approval Request Entries and Approval Entries.

Answer: Customize navigation pane → Departments → Department to edit → Add the desired functions

2. Add a Chart to the Role Center

Scenario

As the sales order (SO) processor you want to adjust your Role Center by adding the following charts:

- Customer Sales and Profit (generic)
- SO per location (generic)

Answer: Customize → Customize this page → Chart Part → Add → Customize the new empty charts

From pdf “MODULE 4: BASIC FUNCTIONALITIES” answer these questions:

1. How many employees are there in CRONUS International, Ltd.?

Answer: 8

2. Who is the contact at customer "Beef House" ?

Answer: Frau Karin Fleischer

3. Who is the contact at customer with number 47563218?

Answer: Thomas Andersen

4. How many bank account are set up in Cronus International, Ltd. ?

Answer: 6

5. What is current inventory of item no. 70000?

Answer: 4282 items

6. Who is the contact at customer 49525252, Beef House?

Answer: Frau Karin Fleischer

7. What is the current balance (LCY) on customer 49525252, Beef House?

Answer: 17346,60

8. How many open invoices does customer 49525252, Beef House, have?

Answer: 0

9. What is the unit price of item number 70040?

Answer: 167,50

10. What keys do you press to delete a customer?

Answer: Customers → Secondary click on customer to delete → Delete → Yes

11. What would the following filter expression display: 1100..2100?

Answer: All records from 1100 to 2100

12. From what type of field can you drill down to related entries?

Answer: You can do so from the navigation pane.

13. What is the e-mail address of vendor Mountain Fisheries ?

Answer: mountain.fisheries@cronuscorp.net

14. What is status of sales order 6003?

Answer: Released

15. Who is purchaser responsible of purchase order no. 104002?

Answer: Muebles Lido

