

Introduction to MS Dynamics

Customer Relationship Management - Opportunities

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CRM – Řízení vztahů se zákazníky

- PROs
 - Umožňuje sledovat všechny potenciální zákazníky (pravděpodobné a potenciální zákazníky)
 - Zlepšení prodejních a marketingových služeb
 - Společnost může propagovat své služby, které dodala svým zákazníkům, aby oslovila další potenciální zákazníky
- CONS
 - Externí CRM software se nemusí dobře integrovat s jinými systémy jako třeba elektronická a účetnictví, saldokonto, nabídky a poptávky
 - Další nevýhodou nově implementovaného softwaru CRM je, že křivka učení je delší, takže obchodníci po implementaci externího CRM SW využívají maximálně 10 % všech možností.

CRM – Customer Relationship Management

- Relationship management is a customer-oriented feature with service response based on customer input, one-to-one solutions to customers' requirements, direct online communications with customer and customer service centres that help customers solve their issues.
- Sales force automation
 - Sales promotion analysis
 - Advertising
 - Personal selling
 - Direct marketing
 - Public relations
 - automate tracking of a client's account history
 - Use of technology (ERP)
- Opportunity Management



CRM – Řízení vztahů se zákazníky

- Řízení vztahů se zákazníky je funkce zaměřená na zákazníka, která zahrnuje reakce zákazníka na služby založené na jeho získání a udržení, individuální řešení jejich požadavků, přímou online komunikaci se zákazníkem a středisky, které služby zákazníkům poskytují , a která zákazníkům pomáhají řešit jejich problémy.
- Automatizace prodejních aktivit
 - Analýza podpory prodeje
 - Reklama- propagace
 - Osobní prodej
 - Přímý marketing
 - Vztahy s veřejností
 - Automatizace sledování historie zákaznického účtu
 - Využití technologie (ERP)
- Správa příležitostí

Hlavní hráči na trhu s CRM SW

I když jsou data v tabulce hodně postarší, stále platí, že uvedené produkty jsou víceméně stále ve hře a jsou na trhu hodně používané

Vendor	2013 Revenue	2013 Share (%)	2012 Revenue	2012 Share (%)
Salesforce.com CRM	3,292	16.1	2,525.6	14.0
SAP AG	2,622	12.8	2,327.1	12.9
Oracle	2,097	10.2	2,015.2	11.1
Microsoft Dynamics CRM	1,392	6.8	1,135.3	6.3
Others	11,076	54.1	10,086.8	55.7
Total	20,476	100	18,090	100

figures in millions of US dollars

Zdroj:

^ "Gartner Says Worldwide Customer Relationship Management Market Grew 23 Percent in 2007" (Press release). Gartner, Inc. 12 September 2008. Retrieved 2008-08-15.

A rok 2024 ?

1 HubSpot



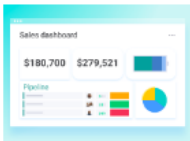
HubSpot - Cloud-based CRM software for collaboration between sales and marketing
655 reviews by ★ Trustpilot

- ✓ Logical, user-friendly interface
- ✓ Up-to-the-minute sales updates
- ✓ A top CRM system for fast growing businesses
- ✓ Get started in minutes

Exceptional **9.8**
★★★★★

Visit Site

2 monday sales CRM



monday sales CRM - Keep up with clients' needs to grow accounts and close deals
3,080 reviews by ★ Trustpilot

- ✓ Get started in minutes
- ✓ Intuitive user-friendly interface
- ✓ Flexible CRM for small business to enterprise

Excellent **9.2**
★★★★★

Visit Site

3 pipedrive



Pipedrive - Top-rated CRM software that transforms the way you manage leads
1,763 reviews by ★ Trustpilot

- ✓ Intuitive platform
- ✓ AI powered automations that save time
- ✓ Easily schedule & customize sales actions

Very Good **8.8**
★★★★★

Visit Site

How to Choose the Right CRM Software for Your Business

1.Setup Time

- Cloud-hosted solutions can be deployed faster than on-premises ones.
- Look for a CRM with good support and a large user community to easily resolve setup difficulties.

2.Ease of Use

- Many CRMs put a strong emphasis on ease of use.
- Find a tool with good data visualization and that provides streamlined apps to help your salespeople enter and access data on the go.

3.Price

- Most CRMs offer a free trial, to help your team evaluate the tool at no cost. CRMs range in price from “free” to “high-ticket enterprise sales”; find one that works within your budget.

4.Add-ons

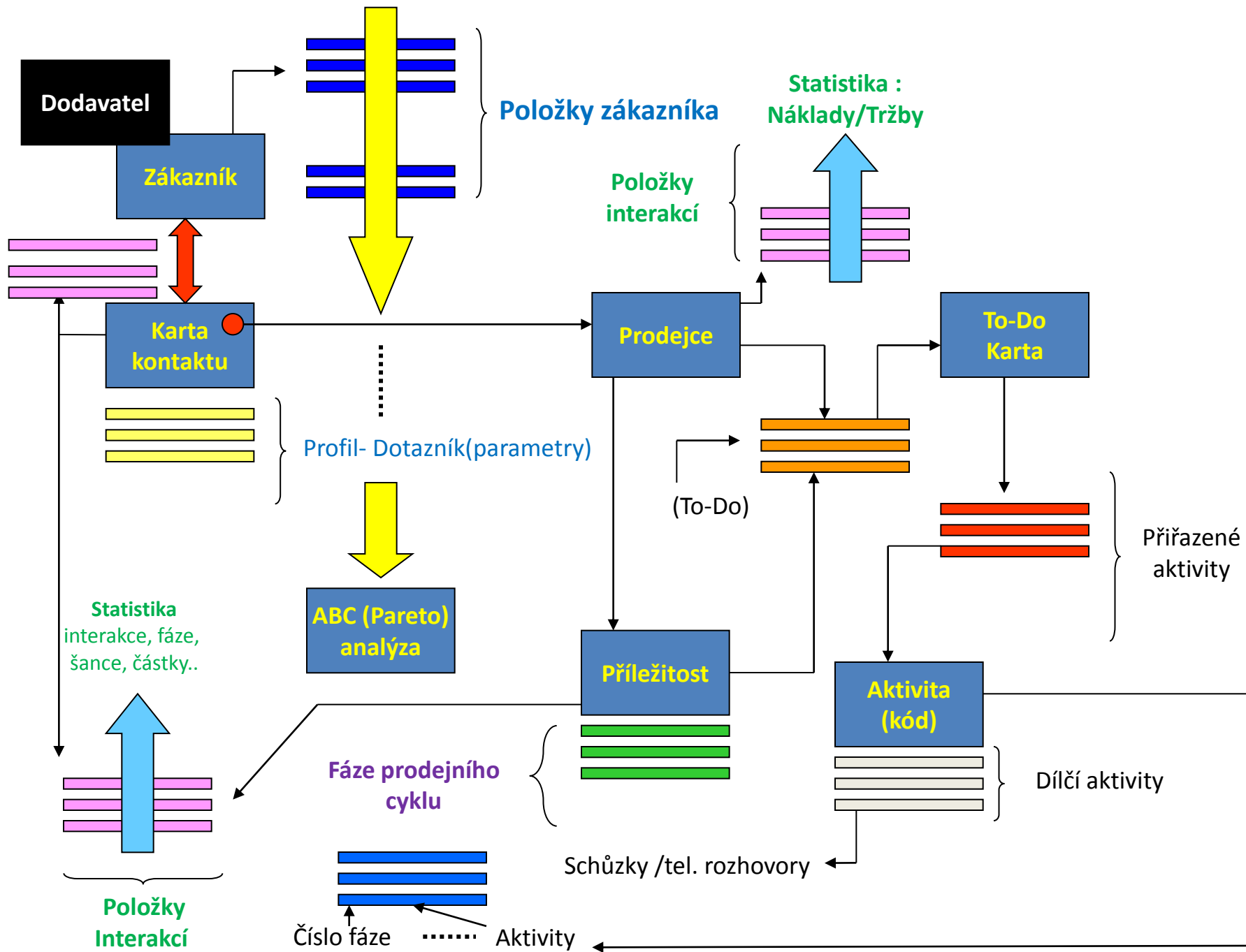
- What does the CRM offer besides lead capture and outreach? Consider looking for a tool with a rich integration library to take advantage of connections with other services you may use.

5.Customer Service

- What hours is the support team available? Look for a support team accessible in your time zone and which provides more than simple ticket support.

6.Interface

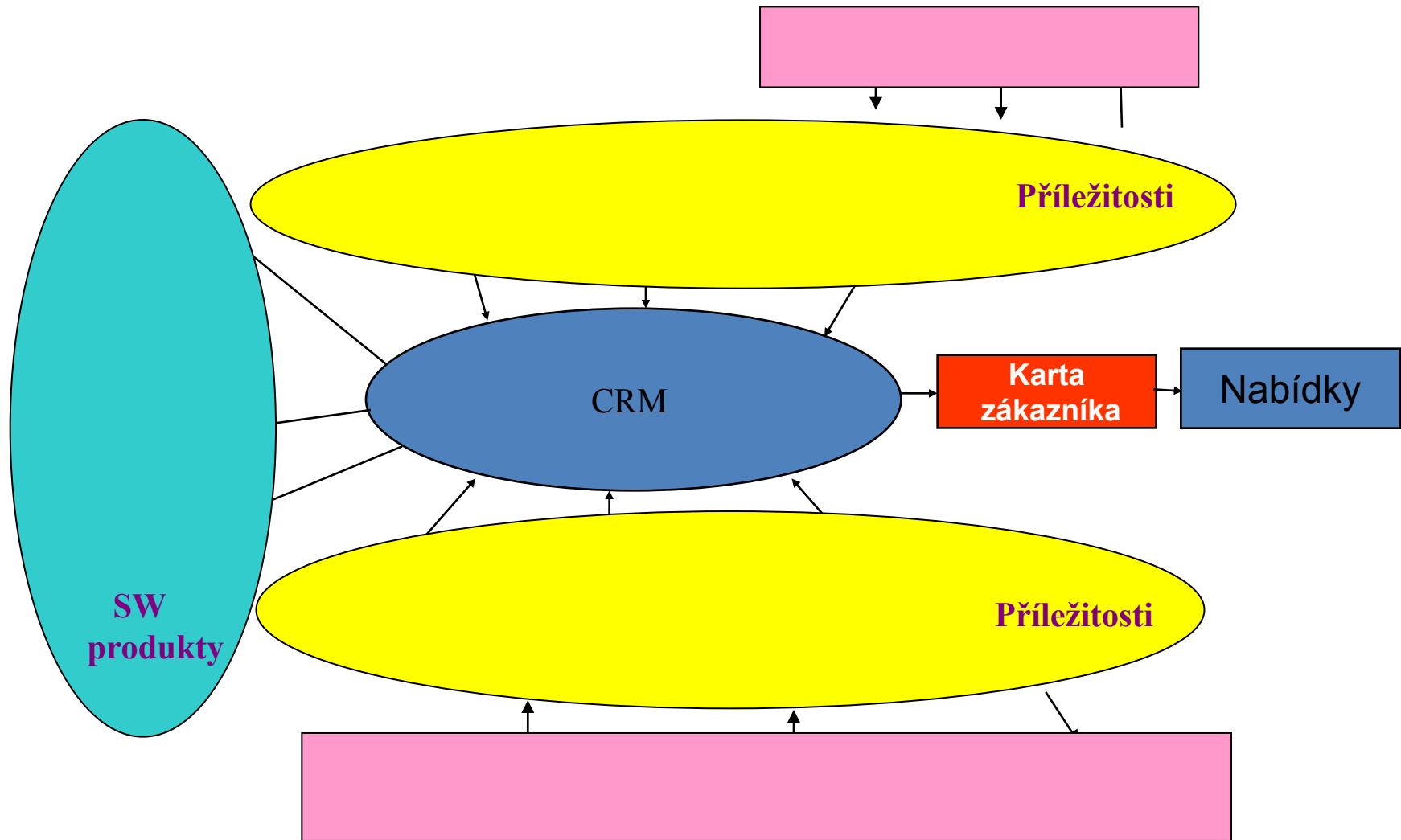
- Is the CRM you’re considering visually pleasing? Options for a tool that makes it easy for your salespeople to visualize their diary and priority appointments.



Hlavní objekty CRM

- Karta kontaktu- firma < ->Dodavatel (Zákazník)
- Karta kontaktu – osoba< -> Dodavatel (Zákazník)
- Charakter kontaktu – Profily (dotazníky), technologie,..
- Interakce (schůzky, prezentace, telefonáty, atd.)
- Obchodní příležitosti
- Prodejní cykly (jak postupovat, aby bylo dosaženo úspěchu- podpisu smlouvy)
- Vytváření karty zákazníka z karty kontaktu (šablony)
- Nabídky, které se dají převést na objednávky
- Položky interakcí
- Segmenty zákazníků (dodavatelů)
- Kampaně a návazné slevové akce (pravděpodobně PIS2)

ERP-CRM



Karta kontaktu

- Karta kontaktu- firma < ->Dodavatel (Zákazník)
- Karta kontaktu – osoba< -> Dodavatel (Zákazník)
- Charakter kontaktu – profily, technologie,..
- Interakce
- Obchodní příležitosti
- Prodejní cykly
- Vytváření karty zákazníka z karty kontaktu
- Nabídky
- Položky interakcí
- Segmenty
- Kampaně a návazné slevové akce



Seznam kontaktů – firma

conta

On current page (Sales Order Processor)

Customer/Item Sales
View a list of item sales for each customer during a selected time period

Go to Pages and Tasks

> Contacts Lists

Search + New Manage Home Contact Prices & Discounts More options

Create Opportunity Create Interaction Create Sales Quote Make Phone Call Send Email Export Contact

No.	Name ↑	Company Name ↑	Contact Business Relation	Phone No.	Email	Salesperson Code	Territory Code
CT200116	David Oliver Lawrence	A. Gibson's Law Firm	Other		david.oliver.lawrence@contoso...	EH	EANG
CT200118	Lori Kane	A. Gibson's Law Firm	Other		lori.kane@contoso.com	EH	EANG
CT100011	Add-ON Marketing	Add-ON Marketing	Other		add-on.marketing@contoso.co...	HR	FOREIGN
CT100190	Chris McGurk	Add-ON Marketing	Other		chris.mcgurk@contoso.com	HR	FOREIGN
CT200008	Gary E. Altman III	Add-ON Marketing	Other		gary.e.altman.iii@contoso.com	HR	FOREIGN
CT200119	Kimberly B. Zimmermann	Add-ON Marketing	Other		kimberly.b.zimmermann@cont...	HR	FOREIGN
CT200047	Mathew Charles	Add-ON Marketing	Other		mathew.charles@contoso.com	HR	FOREIGN
CT200104	Paul Komosinski	Add-ON Marketing	Other		paul.komosinski@contoso.com	HR	FOREIGN
CT200134	Steven B. Levy	Add-ON Marketing	Other		steven.b.levy@contoso.com	HR	FOREIGN
CT000087	Afrifield Corporation	Afrifield Corporation	Customer		afrifield.corporation@contoso....	JO	SE
CT100202	Janice Galvin	Afrifield Corporation	Customer		janice.galvin@contoso.com	JO	SE
CT000088	Mrs. Ariane Peeters	Afrifield Corporation	Customer		mrs.ariane.peeters@contoso.c...	JO	SE
CT000190	Ahornby Hvidevare A/S	Ahornby Hvidevare A/S	Vendor		ahornby.hvidevare.as@contoso...	RB	FOREIGN
CT000191	Hr. Allan Benny Guinot	Ahornby Hvidevare A/S	Vendor		hr.allan.benny.guinot@contoso...	RB	FOREIGN
CT000142	American Wood Exports	American Wood Exports	Vendor		american.wood.exports@contoso...	RB	FOREIGN

Karta kontaktů – firma

CT100011 · Add-ON Marketing

Home [Contact](#) Prices & Discounts Report | Actions ▾ Related ▾ Fewer options

[Comments](#) [Statistics](#) [Customer](#) [Profiles](#) [Vendor](#) [Employee](#) [Bank Account](#) [Sales Quotes](#)

Communication Show less

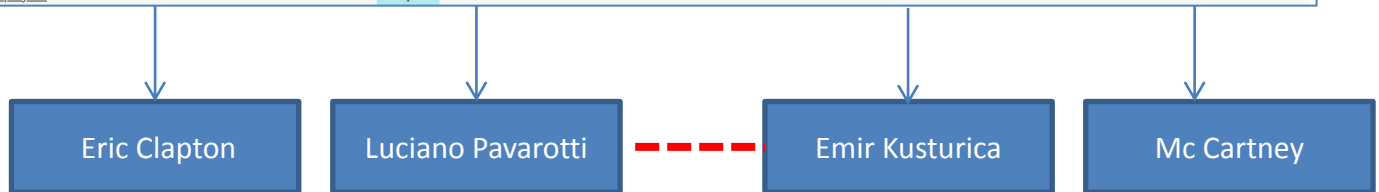
Address	435 Kingston Street	Contact	
Address 2		Phone No.	
Country/Region Code	US	Mobile Phone No.	
Post Code	US-NY 11010	Email	add-on.marketing@contoso.com
City	New York	Fax No.	
Show Map		Home Page	
		Correspondence Type	
		Language Code	ENU

Foreign Trade Show more

Currency Code: USD

Profile Questionnaire New Line Delete Line [↗](#) [✎](#)

Question	Answer	Questions Answered (%)	Last Date Updated
Company Ownership	Family		31.01.2025
→ No. of employees	1.99		31.01.2025



Kontaktní osoby přiřazené ke kartě kontaktu typu společnost

Profil (dotazník) karty kontaktu typu společnost

Contact Card | Work Date: 17.02.2027

CT000142 · American Wood Exports

Home **Contact** Prices & Discounts Report Actions ▾ Related ▾ Fewer options

Comments Statistics Customer Profiles Vendor Employee Bank Account Sales Quotes

Country/Region Code: US Email: american.wood.exports@contoso.com

Post Code: US-NY 11010 Fax No.:

City: New York Home Page:

Show Map

Correspondence Type:

Language Code: ENU

Foreign Trade Show more

Currency Code: USD

Profile Questionnaire New Line Delete Line

Question	Answer	Questions Answered (%)	Last Date Updated
Additional Business Relations	Partner		15.03.2024
→ Company Ownership	Foundation		31.01.2025
No. of employees	1,99		31.01.2025

Profil

Dotazník = Questionnaire

Karta kontaktu typu – osoba

(Creation >Icon Contact->Profiles and checking windows)

General Show more

No.	<input type="text" value="CT200081"/>	...	Company No.	<input type="text"/>	▼
Name	<input type="text" value="Greg Chapman"/>	...	Company Name	<input type="text"/>	▼ ...
Type	<input type="text" value="Person"/>	▼	Business Relation	None	
			Salesperson Code	<input type="text" value="BC"/>	▼



Profile Questionnaire | New Line | Delete Line

Question	Answer	Questions Answered (%)	Last Date Updated
Drinks	Wine		15.03.2024
Personality	Extrovert		15.03.2024
→ <u>Educational level</u>	<input type="text" value="Bachelor"/>		31.01.2025
Marital Status	<input type="text" value="Children"/>		31.01.2025
Hobbies	Golf		15.03.2024
Hobbies	Football		15.03.2024
Sex	Male		31.01.2025

} Profile

Profiles – Questionnaires I

Tell me what you want to do ↗ ✕


Go to Pages and Tasks Show all (14)

[> Questionnaire Setup](#) Administration

Questionnaire Setup | Work Date: 17.02.2027 ✓ Saved 🔖 📄 ↗

🔍 Search + New 📄 Edit List 🗑 Delete ⚙ Edit Questionnaire Setup... 🔗 🔍 ☰

Code ↑	Description	Priority	Contact Type	Business Relation Code
→ COMPANY	General company information	Normal	Companies	
CUSTOMER	Customer information	Normal	Companies	CUST
LEADQ	Lead Qualification	Normal	Companies	PROS
PARETO	Pareto	Normal	Companies	CUST
PARETO 1	Pareto 1	Normal	Companies	CUST
PERSON	General personal information	Normal	People	
PORTF	Customer Portfolio Management	Normal	Companies	CUST
POTENTIAL	Customer Sales Potential	Normal	Companies	CUST
SATISF	Customer Satisfaction Index	Normal		CUST



Profiles (person) – Questionnaires II

Profile Questionnaire Setup							
Search + New Edit List Delete Move Up Move Down ... Share Filter							
Type	Description	Multiple Answers	Priority	Auto Con... Clas...	From Value	To Value	
→ Question ▾	Sex	<input type="checkbox"/>	Normal	<input type="checkbox"/>			
Answer	Male	<input type="checkbox"/>	Low	<input type="checkbox"/>			
Answer	Female	<input type="checkbox"/>	Low	<input type="checkbox"/>			
Question	Hobbies	<input checked="" type="checkbox"/>		<input type="checkbox"/>			
Answer	Football	<input type="checkbox"/>	Low	<input type="checkbox"/>			
Answer	Golf	<input type="checkbox"/>	Low	<input type="checkbox"/>			
Answer	Tennis	<input type="checkbox"/>	Low	<input type="checkbox"/>			
Answer	Hunting	<input type="checkbox"/>	Low	<input type="checkbox"/>			
Answer	Other outdoor	<input type="checkbox"/>	Low	<input type="checkbox"/>			
Answer	Theater	<input type="checkbox"/>	Low	<input type="checkbox"/>			
Answer	Literature	<input type="checkbox"/>	Low	<input type="checkbox"/>			
Answer	Design	<input type="checkbox"/>	Low	<input type="checkbox"/>			
Question	Marital Status	<input checked="" type="checkbox"/>		<input type="checkbox"/>			
Answer	Married	<input type="checkbox"/>	Low	<input type="checkbox"/>			
Answer	Children	<input type="checkbox"/>	Low	<input type="checkbox"/>			
Question	Educational level	<input type="checkbox"/>		<input type="checkbox"/>			
Answer	Master/ Ph.d	<input type="checkbox"/>	Normal	<input type="checkbox"/>			
Answer	Bachelor	<input type="checkbox"/>	Normal	<input type="checkbox"/>			
Answer	Skilled	<input type="checkbox"/>	Normal	<input type="checkbox"/>			
Question	Personality	<input checked="" type="checkbox"/>		<input type="checkbox"/>			
Answer	Extrovert	<input type="checkbox"/>	Normal	<input type="checkbox"/>			
Answer	Analytical	<input type="checkbox"/>	Normal	<input type="checkbox"/>			

Interaction entries

General Show more

No.	<input type="text" value="CT000082"/>	...	Company No.	<input type="text" value="CT000082"/>	▼
Name	<input type="text" value="Beef House"/>	...	Company Name	<input type="text" value="Beef House"/>	▼ ...
Type	<input type="text" value="Company"/>	▼	Business Relation	<input type="text" value="Customer"/>	
			Salesperson Code	<input type="text" value="OF"/>	▼



[Create Interaction](#) [Show Attachments](#) [Switch Checkmark in Canceled](#) [Evaluate Interaction](#) [Create Opportunity](#) ↻

an...	Atte... Failed ↑	Date ↑	Interaction Template Code	Description	Attach...	Contact No. ↑	Contact Name	Contact Company Name	Evaluation	Cost (LCY)	Duration (Min.)	Salesperson Code
<input type="checkbox"/>	<input checked="" type="checkbox"/>	02.01.2025	S_SHIP	Invoice 103005	—	CT000082	Beef House	Beef House		8,00	1	OF
<input type="checkbox"/>	<input type="checkbox"/>	02.01.2025	S_SHIP	Invoice 103006	—	CT000082	Beef House	Beef House		8,00	1	OF
<input type="checkbox"/>	<input type="checkbox"/>	02.01.2025	S_INVOICE	Invoice 103005	—	CT000082	Beef House	Beef House		8,00	1	OF
<input type="checkbox"/>	<input type="checkbox"/>	02.01.2025	S_INVOICE	Invoice 103006	—	CT000082	Beef House	Beef House		8,00	1	OF

Vytvoření nové interakce z karty kontaktu typu osoba I

CT000082	Beef House	<u>Beef House</u>	Customer
CT200082	Zuzana Janska	Lynda McNeal, Inc	Other

Home Contact Prices & Discounts Report Actions Related Fewer options

Create Opportunity **Create Interaction** Create Sales Quote Apply Template...

General Show more

No. CT200082 Company No. CT100014

Name Zuzana Janska Company Name Lynda McNeal, Inc

Type Person Business Relation Other

Salesperson Code EH

Create Interaction - CT200082 Zuzana Janska

General

Contact Zuzana Janska Salesperson EH

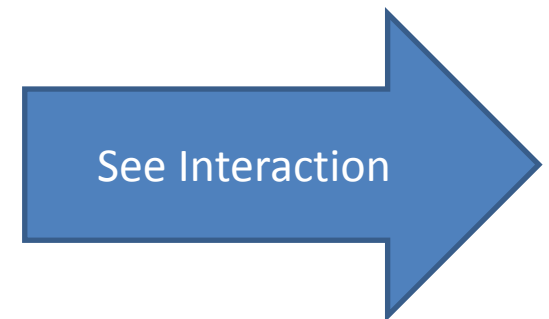
Interaction Template C... **OUTGOING** Language Code

Description Outgoing phone call

Interaction Details Show more

Campaign Opportunity

OK Cancel



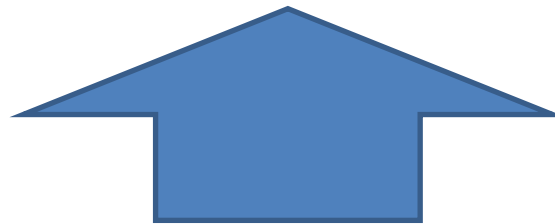
Vytvoření nové interakce z karty kontaktu typu osoba II

Interaction Log Entries - CT100014 . Lynda McNeal, Inc - CT200082 . Zuzana Janska | Work Date: 17.02.2027

Search Home Entry More options

Create Interaction Show Attachments Switch Checkmark in Canceled Evaluate Interaction Create Opportunity

Can...	Atte... Failed	Date ↑	Interaction Template Code	Description	Attach...	Contact No. ↑	Contact Name	Contact Company Name	Evaluation	Cost (LCY)	Duration (Min.)	Salesperson Code
☐	☐	17.02.2027	OUTGOING	Outgoing phone call		CT200082	Zuzana Janska	Lynda McNeal, Inc		1,00	15	EH



Interaction entries by use of wizzard

Another CRM object: Opportunities I.

Contact Card | Work Date: 17.02.2027 ✓ Saved

CT200082 · Zuzana Janska

✕ Do you want to create an opportunity for contact CT200082? [Create opportunity...](#)

[Home](#) | [Contact](#) | [Prices & Discounts](#) | [Report](#) | [Actions](#) ▾ | [Related](#) ▾ | [Fewer options](#)

[Create Opportunity](#) [Create Interaction](#) ▾ | [Create Sales Quote](#) | [Apply Template...](#)

General Show more

No.	<input type="text" value="CT200082"/>	...	Company No.	<input type="text" value="CT100014"/>	▼
Name	<input type="text" value="Zuzana Janska"/>	...	Company Name	<input type="text" value="Lynda McNeal, Inc"/>	▼
Type	<input type="text" value="Person"/>	▼	Business Relation	<input type="text" value="Other"/>	▼
			Salesperson Code	<input type="text" value="EH"/>	▼

History | [Manage](#) | [Functions](#) ↗ ↘

[Show Attachments](#) | [Create Interaction](#) | [Create Opportunity](#) | [Comments](#) | [New Line](#) | [Delete Line](#) ✕

Interaction	Salesperson Code	Description	Attachment	Comment	Opportunity No.	Campaign No.	Date
Outgoing phone call - by Ester Henderson	EH	Outgoing phone call	-	No			17.02.2027
→ Outgoing phone call - by Ester Henderson	EH	Outgoing phone call		No			17.02.2027

Opportunities II.

Opportunity Card | Work Date: 17.02.2027

OP000002 · Prodej debrecínských párků řetězci Rohlík

Home Opportunity | More options

⚡ Activate First Stage | Create Sales Quote | Show Sales Quote | Create Interaction | Postponed Interactions

General Show more

Description: Prodej debrecínských párků řetězci Rohlík | Salesperson Code: EH

Contact No.: CT200082 | Sales Cycle Code: EX-SMALL

Contact Name: Zuzana Janska | Status: Not Started

Sales Cycle Stages | New Line | Delete Line

Active	Action Taken	Sales Cycle Stage	Stage Description	Date of Change	Estimated Close Date	Estimated Value (LCY)	Calcd. Current Value (LCY)	Completed %	Chances of Success %	Probability %
(There is nothing to show in this view)										

Would you like to activate first stage for this opportunity?

Yes No

Opportunities III.

OP000002 · Prodej debrecínských párků řetězci Rohlík

[Home](#) | [Opportunity](#) | [More options](#)

[Update](#) [Create Sales Quote](#) [Close](#) [Show Sales Quote](#) [Create Interaction](#) [Postponed Interactions](#)

General

Show more

Description Prodej debrecínských párků řetězci Rohlík Salesperson Code EH

Contact No. CT200082 Sales Cycle Code EX-SMALL

Contact Name Zuzana Janska Status In Progress

Sales Cycle Stages | [New Line](#) | [Delete Line](#)

Active	Action Taken	Sales Cycle Stage	Stage Description	Date of Change	Estimated Close Date	Estimated Value (LCY)	Calcd. Current Value (LCY)	Completed %	Chances of Success %	Probability %
<input checked="" type="checkbox"/>		.1	Initial	17.02.2027	17.02.2027	0,00	0,00	2	20	11

Update Opportunity - CT100014 Lynda McNeal, Inc CT200082 Zuzana Janska

[Share](#) [Close](#)

Action Type Next

Sales Cycle Stage 2

Sales Cycle Stage Description Presentation

Date of Change 17.02.2027

Estimated sales value (LCY) 10 000,00

Chances of Success (%) 40

Estimated Closing Date 17.02.2027

Cancel Existing Open Tasks

OK

Cancel

Opportunities IV.

Opportunity Card | Work Date: 17.02.2027

OP000002 · Prodej debrecínských párků řetězci Rohlík

Home Opportunity | More options

Update Create Sales Quote Close Show Sales Quote Create Interaction Postponed Interactions

General

Description: Prodej debrecínských párků řetězci Rohlík Salesperson Code: EH

Contact No.: CT200082 Sales Cycle Code: EX-SMALL

Contact Name: Zuzana Janska Status: In Progress

Sales Cycle Stages

Active	Action Taken	Sales Cycle Stage	Stage Description	Date of Change	Estimated Close Date	Estimated Value (LCY)	Calcd. Current Value (LCY)	Completed %	Chances of Success %	Probability %
<input checked="" type="checkbox"/>	Next	2	Presentation	17.02.2027	17.02.2027	10 000,00	4 500,00	50	40	45
<input type="checkbox"/>	:	1	Initial	17.02.2027	17.02.2027	0,00	0,00	2	20	11

Update Opportunity - CT100014 Lynda McNeal, Inc CT200082 Zuzana Janska

Action Type: Next

Sales Cycle Stage: 3

Sales Cycle Stage Description: Proposal

Date of Change: 17.02.2027


Estimated sales value (LCY): 20 000,00

Chances of Success (%): 79

Estimated Closing Date: 17.02.2027

Cancel Existing Open Tasks:

OK Cancel

 You cannot go to this stage before you have assigned a sales quote.

OK

Opportunities V.

Opportunity Card | Work Date: 17.02.2027

OP000002 · Prodej debrecínských párků řetězci Rohlík

Home Opportunity | More options

Update Create Sales Quote Close Show Sales Quote Create Interaction Postponed Interactions

Do you want to create a contact as a customer using a customer template?

Yes No

Select a template for a new customer

Code ↑	Description	Contact Type ▼
→ CUSTOMER COMPANY	Business-to-Business Customer (Bank)	Company
CUSTOMER EU COMPANY	EU Customer (Bank)	Company

Opportunities VI.

Sales Quote | Work Date: 17.02.2027

1003 · Lynda McNeal, Inc

[Home](#) | [Prepare](#) | [Print/Send](#) | [Request Approval](#) | [Quote](#) | [More options](#)

Make Order |
 Make Invoice |
 Release |
 Archive Document

General Show more

Customer Name	Lynda McNeal, Inc	Due Date	03.03.2027
External Document No.		Requested Delivery Date	
Contact	Zuzana Janska	Status	Open

Lines [Manage](#) | [Line](#) | [Functions](#)

New Line |
 Delete Line |
 Select items... |
 Insert Ext. Texts |
 Dimensions

Type	Description	Location Code	Quantity	Qty. to Assemble to Order	Unit of Measure Code	Unit Price Excl. VAT	Line Discount %	Line Amount Excl. VAT
→ Item	Ferrari Clutch	BLUE	10	0	PCS	100,00		1 000,00

Opportunities VII.

Opportunity Card | Work Date: 17.02.2027 ✎ 📄 + 🗑️ ✓ Saved 📄 🔍

OP000002 · Prodej debrecínských párků řetězci Rohlík

[Home](#) [Opportunity](#) | [More options](#) 🕒

🔄 Update 📄 Create Sales Quote ⏏ Close 📄 Show Sales Quote 🔄 Create Interaction 📄 Postponed Interactions 🔍

General Show more

Description Salesperson Code

Contact No. Sales Cycle Code

Contact Name Status

Sales Cycle Stages New Line Delete Line 📄 🔍

Active	Action Taken	Sales Cycle Stage	Stage Description	Date of Change	Estimated Close Date	Estimated Value (LCY)	Calcd. Current Value (LCY)	Completed %	Chances of Success %	Probability %
<input checked="" type="checkbox"/>	Next	3	Proposal	17.02.2027	17.02.2027	648,82	454,17	80	60	70
<input type="checkbox"/>	⋮ Next	2	Presentation	17.02.2027	17.02.2027	10 000,00	4 500,00	50	40	45
→ <input type="checkbox"/>	⋮	1	Initial	17.02.2027	17.02.2027	0,00	0,00	2	20	11

Opportunities VIII.

Opportunity Card | Work Date: 17.02.2027

OP000002 · Prodej debrecínských párků řetězci Rohlík

[Home](#) | [Opportunity](#) | [More options](#)

Update | [Create Sales Quote](#) | [Close](#) | [Show Sales Quote](#) | [Create Interaction](#) | [Postponed Interactions](#)

Update Opportunity - CT100014 Lynda McNeal, Inc CT200082 Zuzana Janska

...

Action Type	Next
Sales Cycle Stage	4
Sales Cycle Stage Description	Sign Contract
Date of Change	17.02.2027
Estimated sales value (LCY)	1 000,00
Chances of Success (%)	100
Estimated Closing Date	17.02.2027
Cancel Existing Open Tasks	<input checked="" type="checkbox"/>

OK | Cancel

Opportunities IX.

Opportunity Card | Work Date: 17.02.2027

OP000002 · Prodej debrecínských párků řetězci Rohlík

Home Opportunity | More options

Update Create Sales Quote **Close** Show Sales Quote Create Interaction Postponed Interactions

Description: Prodej debrecínských párků řetězci Rohlík Campaign No.: ...

Contact No.: CT200082 Priority: Normal

Contact Name: Zuzana Janska Sales Cycle Code: EX-SMALL

Phone No.: Status: In Progress

Mobile Phone No.: Closed:

Email: zuzana.janska@contoso.com Creation Date: 17.02.2027

Contact Company Name: Lynda McNeal, Inc

Salesperson Code: EH

Sales Document Type: Quote

Sales Cycle Stages | New Line Delete Line

Active	Action Taken	Sales Cycle Stage	Stage Description
<input checked="" type="checkbox"/>	Next	4	Sign Contract
<input type="checkbox"/>	Next	3	Proposal
<input type="checkbox"/>	Next	2	Presentation
<input type="checkbox"/>		.1	Initial

Close Opportunity - CT100014 Lynda McNeal, Inc CT200082 Zuzana Janska

General

Opportunity Status: Won Sales (LCY): 1000

Close Opportunity Code: CONSULT_W Cancel Old Tasks:

Closing Date: 17.02.2027

OK Cancel

