

Introduction to MS Dynamics

Customer Relationship Management - Pareto analysis – theory
(For a very simple demonstration used in the tutorial, see file BC - 8-3)

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Pareto Analysis setup

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

Profile Questionnaire Setup | Search + New Edit List Delete Move Up Move Down ...

Type	Description	Multiple Answers	Priority	Auto Con... Clas...	From Value	To Value
→ Question	Pareto	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		
Answer	A	<input type="checkbox"/>	Normal	<input type="checkbox"/>	1 000	
Answer	B	<input type="checkbox"/>	Normal	<input type="checkbox"/>	100	999
Answer	C	<input type="checkbox"/>	Normal	<input type="checkbox"/>		99

Pareto Analysis setup – Question Details

Edit - Profile Question Details - PARETO · Pareto

Answer Points Page

General

Description Pareto

Multiple Answers

Classification

Auto Contact Classific...

Customer Class. Field ... Sales (LCY) ▾

Vendor Class. Field [disabled]

Contact Class. Field [disabled]

Min. % Questions Ans... [disabled]

Starting Date Formula ... -5Y

Ending Date Formula ... CM

Classification Method ... Defined Value ▾

Sorting Method [disabled]

No. of Decimals 0

Close

Pareto Analysis

- We have already manually entered the amount limits for each category (A-C)
- You must check Automatic evaluation
- Run Update (update classification)
- You will get the number of contacts (customers) falling into that category

Profile Questionnaire Setup

Type	Description	Multiple Answers	Priority	Auto Con... Clas...	From Value	To Value
→ Question	Pareto	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		
Answer	A	<input type="checkbox"/>	Normal	<input type="checkbox"/>	1 000	
Answer	B	<input type="checkbox"/>	Normal	<input type="checkbox"/>	100	999
Answer	C	<input type="checkbox"/>	Normal	<input type="checkbox"/>		99

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Profile Questionnaire Setup

Type	Description	Multiple Answers	Priority	Auto Con... Clas...	From Value	To Value
→ Question	Pareto	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		
Answer	A	<input type="checkbox"/>	Normal	<input type="checkbox"/>	1 000	
Answer	B	<input type="checkbox"/>	Normal	<input type="checkbox"/>	100	999
Answer	C	<input type="checkbox"/>	Normal	<input type="checkbox"/>		99

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PARETO | Work Date: 17.02.2027

Profile Questionnaire Setup

Type	Description	Multiple Answers	Priority	Auto Con... Clas...	From Value	To Value
→ Question	Pareto	<input checked="" type="checkbox"/>	Normal	<input checked="" type="checkbox"/>		
Answer	A	<input type="checkbox"/>	Normal	<input type="checkbox"/>	1 000	
Answer	B	<input type="checkbox"/>	Normal	<input type="checkbox"/>	100	
Answer	C	<input type="checkbox"/>	Normal	<input type="checkbox"/>		

Update Classification

Update Classification

Move Up

Move Down

Print

Use short menu

3

Pareto Analysis

Profile Questionnaire Setup | Search | + New | Edit List | Delete | Move Up | Move Down | Line | Update Classification | Print | Actions | Fewer options

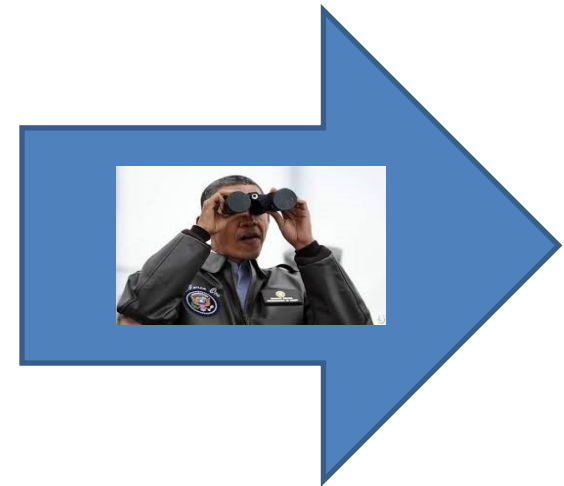
Type	Description	Multiple Answers	Priority	Auto Contact Classification	From Value	To Value	No. of Contacts
→ Question	Pareto	<input checked="" type="checkbox"/>	Normal	<input checked="" type="checkbox"/>			-
Answer	A	<input type="checkbox"/>	Normal	<input type="checkbox"/>	1 000		18
Answer	B	<input type="checkbox"/>	Normal	<input type="checkbox"/>	100	999	7
Answer	C	<input type="checkbox"/>	Normal	<input type="checkbox"/>		99	52

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Pareto Analysis

By expanding the number of contacts (calculated field) and we have used B for our model) we got :

Contact No. ↑	Contact Company Name	Contact Name
CT000015	Guildford Water Department	Guildford Water Department
CT000021	New Concepts Furniture	New Concepts Furniture
CT000027	Candoxy Nederland BV	Candoxy Nederland BV
CT000043	Gagn & Gaman	Gagn & Gaman
CT000075	Englunds Kontorsmöbler AB	Englunds Kontorsmöbler AB
CT000099	Candoxy Canada Inc.	Candoxy Canada Inc.
CT000262	Berlin Machinery	Berlin Machinery



Select - Contacts					
No.	Name ↑	Company Name ↑	Contact Business Relation	Phone No.	Email
→ CT000015	Guildford Water Department	Guildford Water Department	Customer		guik
CT000016	Mr. Jim Stewart	Guildford Water Department	Customer		mr.ji

Pareto Analysis

Select - Contacts | 🔍 v + New ... ⓘ ↗ ✕

No.	Name ↑	Company Name ↑	Contact Business Relation	Phone No.	Email
→ CT000015	Guildford Water Department	<u>Guildford Water Department</u>	Customer		guil...

Contact Card | Work Date: 17.02.2027

CT000015 · Guildford Water Department

Home Contact Prices & Discounts Report Actions v Related v Fewer options

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

Communication > GU7 SGT | guildford.water.department@contoso.com | ENG

Foreign Trade Show m

Currency Code

Profile Questionnaire New Line Delete Line

Question	Answer	Questions Answered (%)	Last Date Updated
Pareto	B		15.03.2024
Customer Purchase Frequency, Last Year	< 3 times a year		31.01.2025
Customer Purchase Frequency, Current Year	< 3 times a year		31.01.2025
Turnover (LCY), Last Year	low (below 1,000)		31.01.2025

Campaign Setup – use of setup Sales Price Lists

Tell me what you want to do ↗ ✕

camp

On current page (Sales Order Processor)

- Price List**
View a list of your items and their prices, for example, to send to customers. You can cre...
- Price Worksheet**
Manage sales prices for individual customers, for a group of customers, for all customer...

Go to Pages and Tasks Show all (37)

[> Campaigns](#) Lists

Campaigns | Work Date: 17.02.2027

Search [+](#) New [Manage](#) [Home](#) [Campaign](#) [Prices & Discounts](#) | [More options](#)

Segments Activate Sales Prices/Line Discounts Deactivate Sales Prices/Line Discounts

No. ↑	Description	Salesperson Code	Status Code	Starting Date	Ending Date
CP1001	⋮ Increase sale	HR	5-START	01.11.2024	01.04.2025
CP1002	Event	BC	9-DONE	15.01.2025	18.01.2025
CP1003	Working place arrangement	OF	5-START	05.01.2025	01.04.2025
CP1004	⋮ Spring offer	BC	1-PLAN	01.03.2025	01.06.2025

Campaign Setup

Campaign Card | Work Date: 17.02.2027

CP1001 · Increase sale

Campaign Prices & Discounts More options

General

No.	CP1001	Ending Date	31.03.2028
Description	Increase sale	Salesperson Code	HR
Status Code	5-START	Last Date Modified	15.03.2024
Starting Date	01.11.2024	Activated	<input type="checkbox"/>

Invoicing

Department Code	SALES	Project Code	
-----------------	-------	--------------	--

Campaign Card | Work Date: 17.02.2027

CP1001 · Increase sale

Campaign Prices & Discounts More options

Activate Sales Prices/Line Discounts Sales Prices Sales Price Lists Sales Discounts Deactivate Sales Prices/Line Discounts

No.	CP1001	Ending Date	31.03.2028
Description	Increase sale	Salesperson Code	HR
Status Code	5-START	Last Date Modified	15.03.2024
Starting Date	01.11.2024	Activated	<input type="checkbox"/>



Invoicing









Department Code	SALES	Project Code	
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Price List Lines | Work Date: 17.02.2027

Search




Campaign Setup Sale Price List

Campaign CP1001 Increase sale | Work Date: 17.02.2027 ✓ Saved  

Price List Lines |  Search  Edit List  Open Price List  Verify Lines...  Sales Price Lists ...   

Price List Code ↑	Price List Description	Price Status	Product Type	Product No.	Description
→ S00009	PIS1 Campaign	Active	Item	1936-S	BERLIN Guest Chair, yellc

Edit - Sales Price List - S00009 ↗

Manage  Verify Lines...  Copy Lines...  Suggest Lines... Page

General Show More

Code	S00009	Status	Active
Description	PIS1 Campaign	Currency Code	
Assign-to Type	Campaign	Starting Date	01.11.2024
Assign-to No.	CP1001	Ending Date	31.03.2028

VAT

VAT Bus. Posting Gr. (Price)

Price Includes VAT

View





View Columns for

Line Defaults

Allow Updating Defaults

Allow Invoice Disc.

Allow Line Disc.

Lines |  New Line  Delete Line  

Product Type	Product No.	Description	Variant Code	Work Type Code	Unit of Measure Code	Minimum Quantity	Defines	Unit Price	Allow Line Disc.	Line Discount %	Allow Invoice Disc.
Item	1936-S	BERLIN Guest Chair, yellow			PCS	4	Price	60,00	<input type="checkbox"/>	0,00	<input checked="" type="checkbox"/>
→ Item	1936-S	BERLIN Guest Chair, yellow			PCS	6	Discount	0,00	<input type="checkbox"/>	12,00	<input type="checkbox"/>

Contact Segmentation

Tell me what you want to do

seg

Go to Pages and Tasks

> Segments Lists

Segments | Work Date: 17.02.2027

Search + New Manage | More options

No. ↑	Description	Campaign No.	Salesperson Code	Date
SM10001	⋮ Increase sale	CP1001	HR	23.01.2025
SM10002	Event	CP1002	BC	23.01.2025
SM10003	Working place arrangement, Press	CP1003	OF	23.01.2025
SM10004	Working place arrangement, Customer	CP1003	OF	23.01.2025

Contact Segmentation – Add contact Pareto B

Segment | Work Date: 17.02.2027

SM00001 · PIS1 Model

Log Add Contacts... Print Cover Sheets More options

General Show more

Description PIS1 Model No. of Lines 0

Salesperson Code EH No. of Criteria Actions 0

Date 17.02.2027

Lines Manage Line Functions

New Line Delete Line

Contact No.	Correspon... Type	Contact Company Name	Contact Name	Description
→				

Add Contacts

Options

Allow Existing Contacts

Expand Companies

Allow Related Companies

Ignore Exclusion

Filter: Contact Profile Answer





× Profile Questionnaire Code PARETO

× Line No. 30000



+ Filter...

B

Contact segmentation – Contacts type Pareto B

Segment | Work Date: 17.02.2027   +  ✓ Saved 


SM00001 · PIS1 Model

✓ Log  Add Contacts...  Print Cover Sheets | More options




General Show more

Description No. of Lines

Salesperson Code No. of Criteria Actions

Date 



Lines | [Manage](#) Line Functions

 New Line  Delete Line 

Contact No.	Correspon... Type	Contact Company Name	Contact Name	Description
CT000027	:	Candoxy Nederland BV		PIS1 Model
CT000075		Englunds Kontorsmöbler AB		PIS1 Model
CT000043		Gagn & Gaman		PIS1 Model
CT000015		Guildford Water Department		PIS1 Model
CT000021		New Concepts Furniture		PIS1 Model
→				

Contact segmentation -> Campaign added for Pareto B contacts

SM00001 · PIS1 Model

✓ Log  Add Contacts...  Print Cover Sheets | Actions ▾ Related ▾ Fewer options

CT000099		Candoxy Canada Inc.	PIS1 Model
CT000027		Candoxy Nederland BV	PIS1 Model
CT000075		Englunds Kontorsmöbler AB	PIS1 Model
CT000043		Gagn & Gaman	PIS1 Model
CT000015		Guildford Water Department	PIS1 Model
CT000001		...	PIS1 Model

Interaction

Interaction Template ...	<input type="text"/>	Correspondence Typ...	<input type="text"/>
Language Code (Defa...	<input type="text"/>	Information Flow	<input type="text"/>
Subject (Default)	<input type="text"/>	Initiated By	<input type="text"/>
Attachment	<input type="checkbox"/>	Unit Cost (LCY)	0,00
Word Template Code ...	<input type="text"/>	Unit Duration (Min.) ...	0
Ignore Contact Corre...	<input type="checkbox"/>	Send Word Docs. as ...	<input type="checkbox"/>

Campaign

Campaign No.	CP1001	Campaign Target	<input checked="" type="checkbox"/>
Campaign Description ..	Increase sale	Campaign Response ...	<input type="checkbox"/>

Contact Segmentation – Add contact Pareto A

Segment | Work Date: 17.02.2027

SM00002 · PIS1_Pareto_A

Log Add Contacts... Print Cover Sheets Actions Related Fewer options

General

Description	<input type="text" value="PIS1_Pareto_A"/>	No. of Lines	<input type="text"/>
Salesperson Code	<input type="text" value="EH"/>	No. of Criteria Actions	<input type="text"/>
Date	<input type="text" value="17.02.2027"/>		

Contact segmentation – Pareto A contacts

Add Contacts ↗ ✕

× Post Code

× Country/Region Code

× Territory Code

+ Filter...

Filter totals by:

+ Filter...

Filter: Contact Profile Answer

× Profile Questionnaire Code

× Line No.

+ Filter...

A

Contact segmentation – Pareto A contacts

Segment | Work Date: 17.02.2027 ✎ 🔗 + 🗑️ ✓ Saved 📄

SM00002 · PIS1_Pareto_A

✓ Log 📄 Add Contacts... 🖨️ Print Cover Sheets | Actions Related Fewer options

General Show more

Description No. of Lines 18

Salesperson Code No. of Criteria Actions 1

Date 📅

Lines | Manage Line Functions 🔗 📄

📄 New Line 🗑️ Delete Line 🔗

Contact No.	Correspon... Type	Contact Company Name	Contact Name	Description
CT000082		Beef House		PIS1_Pareto_A
CT000053		BYT-KOMPLET s.r.o.		PIS1_Pareto_A
CT000013		Deerfield Graphics Company		PIS1_Pareto_A
CT000059		Designstudio Gmunden		PIS1_Pareto_A
CT000045		Heimilispyrdi		PIS1_Pareto_A
CT000085		Hotel Pferdeseesee		PIS1_Pareto_A

Contact segmentation -> Campaign added for Pareto A contacts

SM00002 · PIS1_Pareto_A

✓ Log Add Contacts... Print Cover Sheets | Actions Related Fewer options

CT000070		Klubben	PIS1_Pareto_A
CT000257		KPS Brno	PIS1_Pareto_A
CT000264		Královopolská strojírna Ltd.	PIS1_Pareto_A
CT000260		Pivovar Kozí	PIS1_Pareto_A
CT000019		Progressive Home Furnishings	PIS1_Pareto_A
CT000009		Selangorian Ltd.	PIS1_Pareto_A

Interaction

Interaction Template ...	<input type="text"/>	Correspondence Typ...	<input type="text"/>
Language Code (Defa...	<input type="text"/>	Information Flow	<input type="text"/>
Subject (Default)	<input type="text"/>	Initiated By	<input type="text"/>
Attachment	<input type="checkbox"/>	Unit Cost (LCY)	0,00
Word Template Code ...	<input type="text"/>	Unit Duration (Min.) ...	0
Ignore Contact Corre...	<input type="checkbox"/>	Send Word Docs. as ...	<input checked="" type="checkbox"/>

Campaign

Campaign No.	<input type="text" value="CP1001"/>	Campaign Target	<input checked="" type="checkbox"/>
Campaign Description ...	Increase sale	Campaign Response ...	<input type="checkbox"/>

Activation of Sales Price lists for chosen Customer Segments Parte A nad B and related campaign CP1001

The screenshot displays a campaign card for 'CP1001 · Increase sale' with a work date of 17.02.2027. The card includes a navigation bar with 'Prices & Discounts' selected, and a menu with options like 'Sales Price Lists' and 'Sales Discounts'. A red box highlights the 'Activate Sales Prices/Line Discounts' button, which is linked by an arrow to an information message box stating 'Campaign CP1001 is now activated.'

Campaign Card | Work Date: 17.02.2027

CP1001 · Increase sale

Campaign [Prices & Discounts](#) | Related ▾ Reports ▾ Fewer options

Activate Sales Prices/Line Discounts Sales Prices Sales Price Lists Sales Discounts Deactivate Sales Prices/Line Discounts

i Campaign CP1001 is now activated.

Before activating discounts for a selected campaign, it is first necessary to select a segment of customers according to the selected criteria (Pareto) and assign this segment to the campaign being set up

Sales Invoice for contact (Customer) Pareto A

Sales Invoice | Work Date: 17.02.2027

1031 · BYT-KOMPLET s.r.o.

Home Prepare Print/Send Request Approval Invoice | More options

Post | Release |

General

Customer Name BYT-KOMPLET s.r.o. ... VAT Date

Contact Milos Silhan ... Due Date

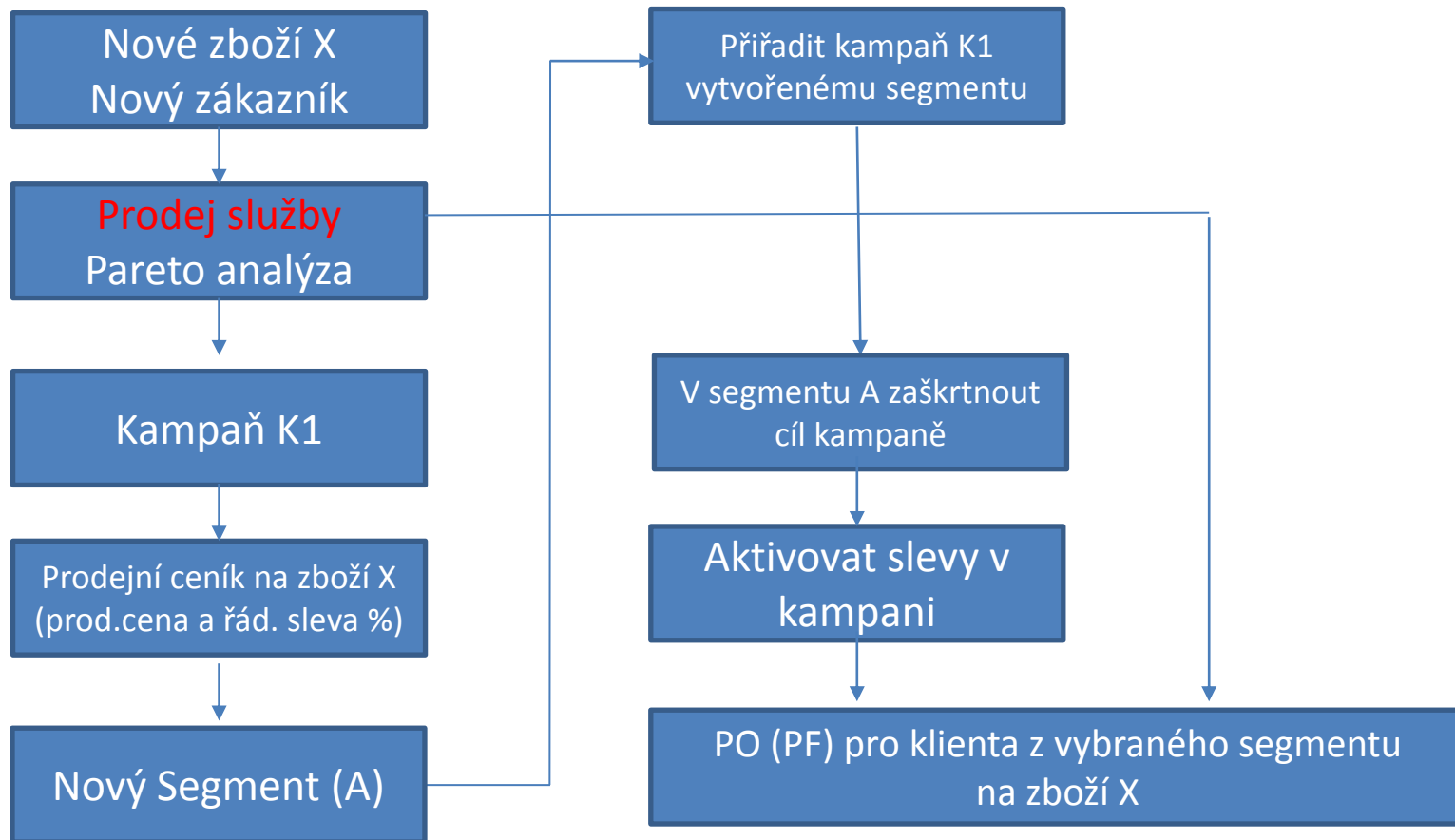
Posting Date 17.02.2027 ... Status

Lines | Manage Line

Select items... New Line Delete Line

Type	No.	Item Reference No.	Description	Location Code	Quantity	Unit of Measure Code	Unit Price Excl. VAT
Item	1936-S		BERLIN Guest Chair, yellow	BLUE	4		60,00
→ Item	1936-S		BERLIN Guest Chair, yellow	RED	1	PCS	125,10

Blokové schéma postupu příkladu



Selling a service to a new customer so that the contact is classified as type A after updating the Pareto questionnaire

End of the section

(Customer Relationship Management)



