

Introduction to Business Central

(Customer Relationship Management)

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CRM – Customer Relationship Management

- **PROs**
 - It enables us to keep track of all prospective customer (suspects and prospects)
 - Improve sales and marketing service
 - The company can promote the work it has done for its customers to approach prospects
- **CONs**
 - CRM software may not integrate well with other email and accounting systems
 - Another disadvantage to a newly implemented CRM software is the learning curve.

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 centers that help customers solve their issues.
- Salesforce automation
 - Sales promotion analysis
 - Advertising
 - Personal selling
 - Direct marketing
 - Public relations
 - Automate tracking of a client's account history
 - Use of technology (ERP->MS Dynamics NAV)
- **Opportunity Management** (see an extra picture related to so-called Business Rainbow)

Market leaders (home study)

Although the table is somewhat old-fashioned, I can confirm that the importance of CRM is growing at an extreme pace

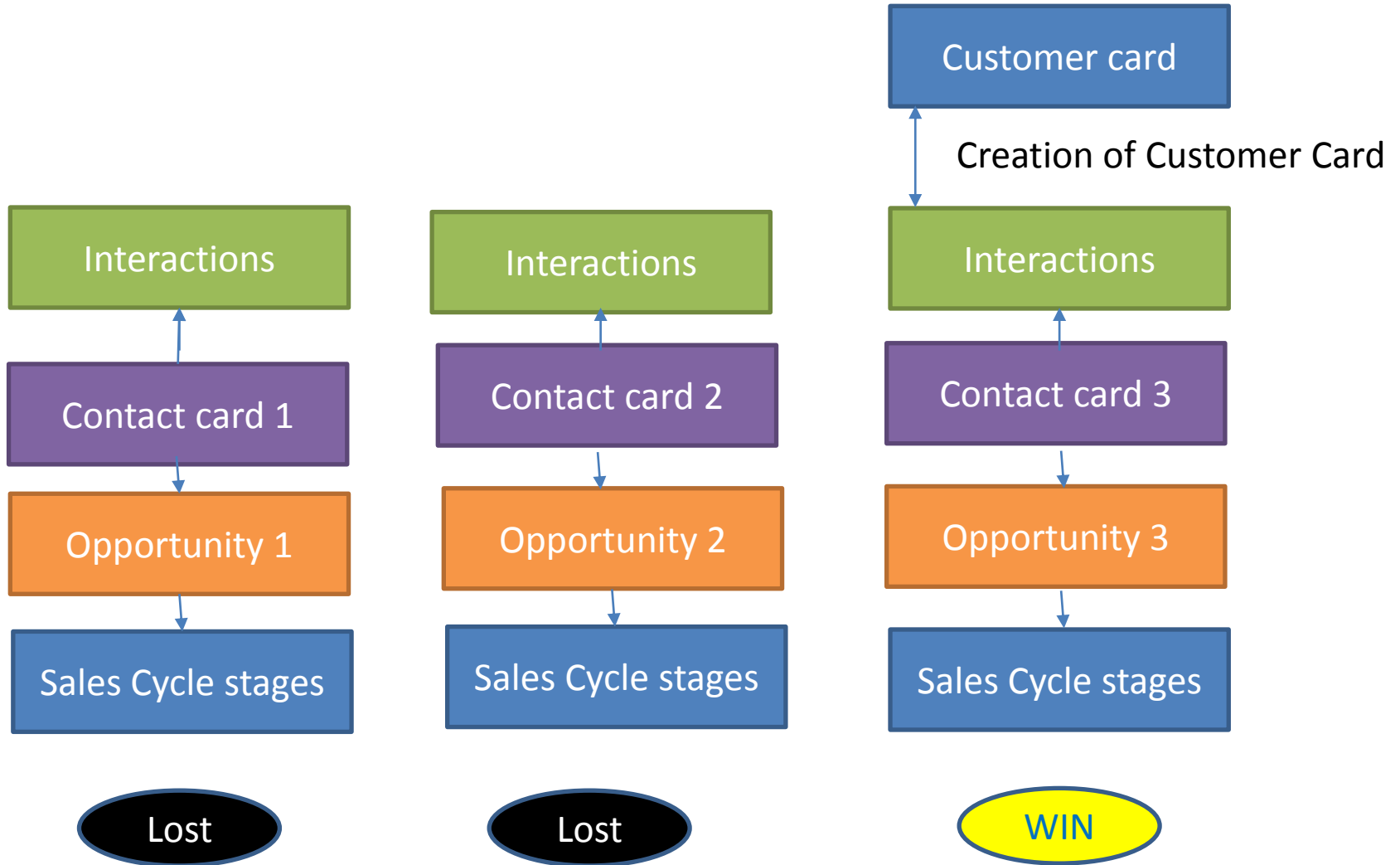
Vendor	2013 Revenue	2013 Share (%)	2012 Revenue	2012 Share (%)
Salesforce.com CRM	3,292	16.1	2,525.6	14.0
SAP AG	2,622	12.8	2,327.1	12.9
Oracle	2,097	10.2	2,015.2	11.1
Microsoft Dynamics CRM	1,392	6.8	1,135.3	6.3
Others	11,076	54.1	10,086.8	55.7
Total	20,476	100	18,090	100

figures in millions of US dollars

Source:

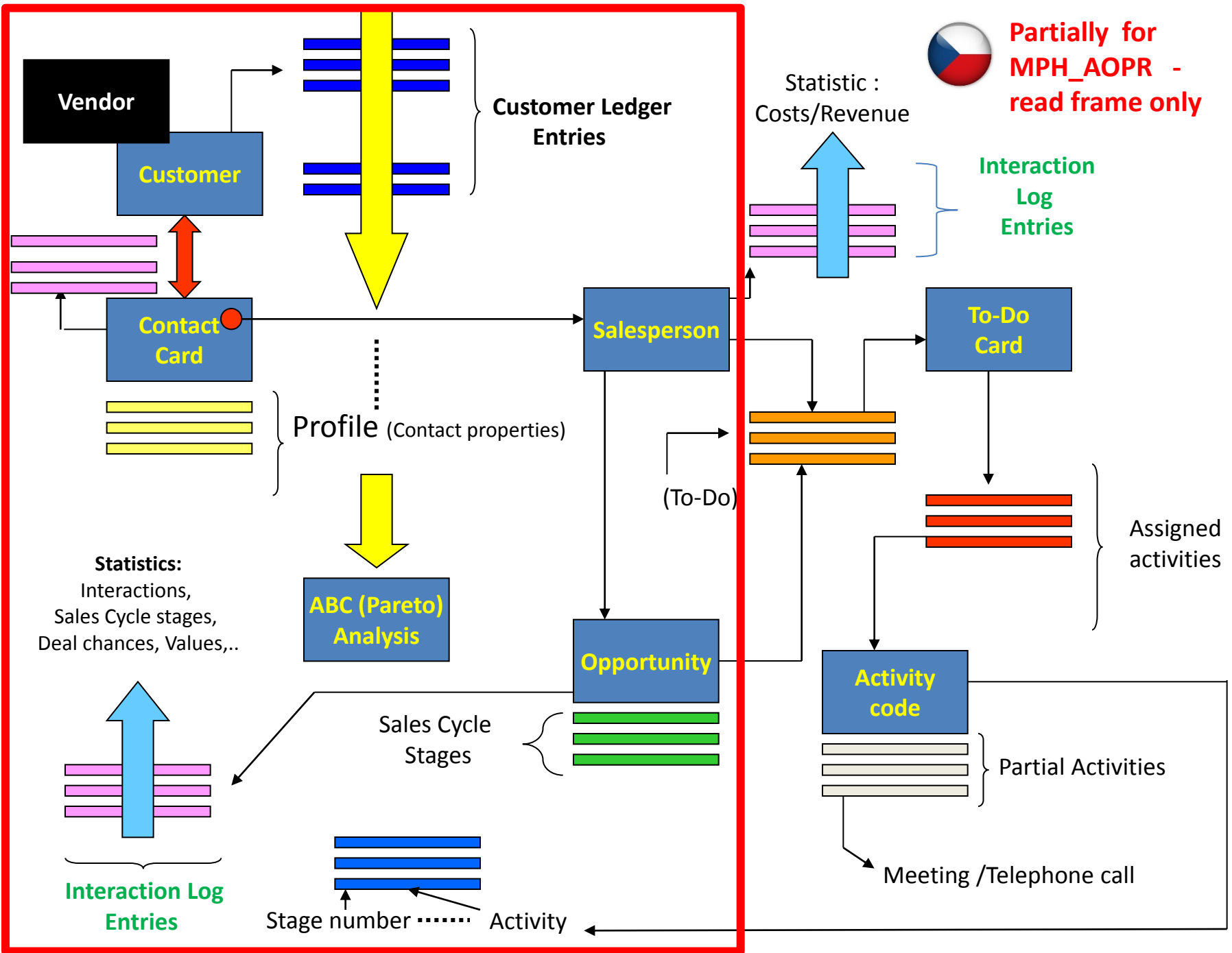
^ "Gartner Says Worldwide Customer Relationship Management Market Grew 23 Percent in 2007" [\(Press release\)](#). Gartner, Inc. 12 September 2008. Retrieved 2008-08-15.

Customer (Vendor)-Contact Cards





Partially for MPH_AOPR - read frame only



Edit - My Settings ↗ ✕

Role Sales and Relationship Manager ⋮

Company CRONUS International Ltd. ⋮

Work Date 7/20/2022 📅

Region & Language

Region English (United States) ⋮

Language English (United States) ⋮

Time Zone (UTC+01:00) Amsterdam, Berlin, Bern, Ro... ⋮

Notifications [Change when I receive notifications.](#)

Your last sign in was on 09/17/21 01:15 PM.



Dynamics 365 Business Central

CRONUS International Ltd. | Sales ▾ Posted Documents ▾ Administration Sales/Purchase ▾ Analysis ▾ Setup & Extensions ▾ | ☰

[Contacts](#) [Opportunities](#) Sales Quotes Sales Orders Customers Items Active Segments Logged Segments Campaigns Cases - Dynami...tomer Service More ▾

Contact cards

- Contact card- company->Customer (Vendor)
- Contact card- person -> Customer (Vendor)
- Contact Character– profiles, technologies,..
- Interactions (driven mostly by wizard) – telephones , meetings, presentations
- Business Opportunities (estimated close date and value, probability,..)
- Sales Cycles activities (stages)
- Customer Card creation from Contact card using templates
- Quotes assigned to Contact cards
- **Interaction log entries**



List of contact

No.	Name ↑	Phone No.	Email	Salesperson Code	Territory Code
CT200081	⋮ Greg Chapman		greg.chapman@contoso.com	BD	SW
CT200021	Hans Visser		hans.visser@contoso.com	BD	NWAL
CT100212	Karen Archer		karen.archer@contoso.com	MD	SWAL
CT100223	Magnus Hedlund		magnus.hedlund@contoso.com	PS	FOREIGN
CT200006	Mark McArthur		mark.mcarthur@contoso.com	JR	SWAL
CT100211	Peter Conelly		peter.conelly@contoso.com	DC	S
CT100006	A. Gibson's Law Firm		a.gibsons.law.firm@contoso.com	AH	EANG
CT200057	Alan Brewer		alan.brewer@contoso.com	AH	EANG
CT200116	David Oliver Lawrence		david.oliver.lawrence@contoso.com	AH	EANG
CT200118	Lori Kane		lori.kane@contoso.com	AH	EANG
CT100011	Add-ON Marketing		add-on.marketing@contoso.com	DC	FOREIGN

Contact card – company - (Header of the contact card)

Contact Card | Work Date: 7/20/2022

CT100011 · Add-ON Marketing **Company Contact Card**

Process Report Page More options

General Show more

No. CT100011 Type Company

Name Add-ON Marketing Company Name Add-ON Marketing

Communication Show more

Address

Address 435 Kingston Street

Address 2

Country/Region Code US

Post Code US-NY 11010

City New York

Contact

Phone No.

Mobile Phone No.

Email add-on.marketing@contoso.com

Home Page

Language Code ENU

[Show Map](#)

Foreign Trade Show more

Currency Code USD

[Profile Questionnaire >](#)



Contact persons type cards

Customer card->Contact card (relationship)

Customer Card | Work Date: 7/20/2022

10000 · The Cannon Group PLC

New Document Approve Request Approval Prices & Discounts Navigate Customer Actions **Related** Reports Fewer options

Customer History Prices and Discounts Sales Documents Service

Dimensions 10000 Credit Limit (LCY) 0.00

Bank Accounts The Cannon Group PLC Blocked

Direct Debit Mandates 169,338.37 Total Sales 18,167.93

Ship-to Addresses 168,364.41 Costs (LCY) 12,737.70

Contact

Cross References

Comments

Approvals

Attachments

192 Market Square

Contact Name Mr. Andy Teal

Customer Picture

Sell-to Customer Sales History

Customer No. 10000

Contact Card

Another option for accessing contacts from the customer card

10000 · The Cannon Group PLC

Showing the first 50 prices and discounts. To view all prices and discounts, choose Re

New Document Approve Request Approval Prices & Discounts **Navigate**

Statement Bank Accounts Ship-to Addresses

Scheduled Statements Direct Debit Mandates **Contact**

Contact cards

No.	Name ↑	Phone No.	Email	Salesperson Code	Territory Code
CT000007	The Cannon Group PLC		the.cannon.group.plc@contoso.com	PS	MID
CT100140	David Hodgson		david.hodgson@contoso.com	PS	MID
CT100156	John Emory		john.emory@contoso.com	PS	MID
CT200136	Mindy Martin		mindy.martin@contoso.com	PS	FOREIGN
CT000008	Mr. Andy Teal		mr.andy.teal@contoso.com	PS	MID
CT100210	Stephanie Bourne		stephanie.bourne@contoso.com	PS	MID

Person card

Company card

See next slide

Questionnaire Setup I

Tell me what you want to do ↗ ✕

Go to Pages and Tasks Show all (14)

- > Questionnaire Setup Administration
- > Requests to Approve Lists
- > Approval Request Entries Lists

Questionnaire Setup | Work Date: 2/17/2027

✓ 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
→ 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

Questionnaire Setup II

PERSON | Work Date: 2/17/2027

Profile Questionnaire Setup | Search + New Edit List Delete Mo

Type	Description	Mul... Ans...	Priority	Auto Con... Clas...
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"/>
Question	Drinks	<input checked="" type="checkbox"/>		<input type="checkbox"/>
Answer	Wine	<input type="checkbox"/>	Normal	<input type="checkbox"/>
Answer	Beer	<input type="checkbox"/>	Normal	<input type="checkbox"/>
Answer	Lemonade	<input type="checkbox"/>	Normal	<input type="checkbox"/>
Answer	Water	<input type="checkbox"/>	Normal	<input type="checkbox"/>
Answer	Gin	<input type="checkbox"/>	Normal	<input type="checkbox"/>

You enter this in by yourself

Contact Card (CC) – type=Company

Contact Card | Work Date: 7/20/2022

CT000007 · The Cannon Group PLC

Process Report Page More options

General Show more

No. CT000007 Type Company

Name The Cannon Group PLC Company Name The Cannon Group PLC

Communication Show more

Address

Address 192 Market Square

Address 2

Country/Region Code GB

Post Code B27 4KT

City Birmingham

[Show Map](#)

Contact

Phone No.

Mobile Phone No.

Email the.cannon.group.plc@contoso.com

Home Page

Language Code ENG

Foreign Currency

Profile Questionnaire Manage

Profile

Question	Answer	Questions Answered (%)	Last Date Update
→ Discount (%) Last Year	Low discount usage		1/31/2022
Customer Purchase Frequency, Last Year	> 5 times a year		1/31/2022
Customer Purchase Frequency, Current Year	> 5 times a year		1/31/2022
Turnover (LCY), Last Year	low (below 1,000)		1/31/2022
Turnover (LCY), Current Year	High (over 4,000)		1/31/2022
Discount (%) Current Year	Medium discount usage		1/31/2022
Profit (LCY) Current Year	Top 25 % of Customers		1/31/2022

How to edit and edit profile from one CC ->Related->Contact->Profiles

Contact Card- Person

Contact Card | Work Date: 7/20/2022 ✎ + 🗑️ ✓ Saved 🔗

CT100140 · David Hodgson

Process Report Page | More options

Address

Address 192 Market Square

Address 2

Country/Region Code GB ▾

Post Code B27 4KT ...

City Birmingham ...

Contact

Phone No.

Mobile Phone No.

Email david.hodgson@contoso.com

Home Page

Language Code ENG ▾

[Show Map](#)

Foreign Trade Show more

Currency Code ▾

Profile Questionnaire | Manage 🔗

Question	Answer	Questions Answered (%)	Last Date Updated
→ Educational level	Skilled		1/31/2022
Hobbies	Football		1/31/2022
Sex	Male		1/31/2022

Profile ▾

Contact Card- Company-new person

(created from Company card)

Contact Card | Work Date: 7/20/2022

CT000257

Process Report Page More options

General Show more

No.	CT000257	Type	Person
Name	* John Miller	Company Name	The Cannon Group PLC

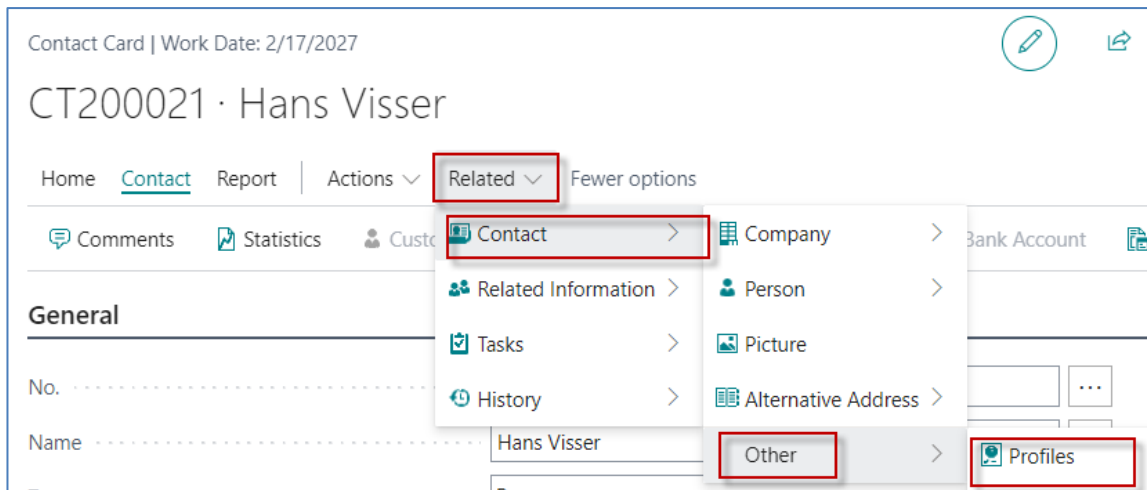
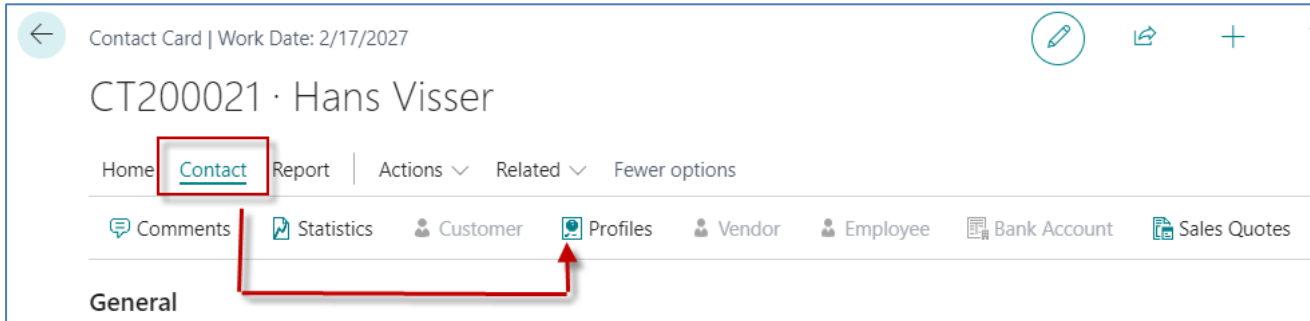
Communication Show more

Address	Contact		
Address	192 Market Square	Phone No.	
Address 2		Mobile Phone No.	
Country/Region Code	GB	Email	the.cannon.group.plc@contoso.com
Post Code	B27 4KT	Home Page	
City	Birmingham	Language Code	ENG

[Show Map](#)



Two ways how to access profile of the Contact Card



Contact Card- Company-new person – profile I

Contact Card | Work Date: 7/20/2022

CT000257 · John Miller

Process Report Page Actions **Related**

Contact ▾ Related Information ▾ Task

- Company >
- Person >
- Profiles**
- Comments
- Alternative Address >

Edit - Contact Profile Answers - CT000007 The Cannon Group PLC CT000257 John... ↗ ✕

Search Edit List Open in Excel

Profile Questionnaire Code PERSON

Type	Description	Set
Question	Sex	<input type="checkbox"/>
Answer	Male	<input checked="" type="checkbox"/>
Answer	Female	<input type="checkbox"/>
Question	Hobbies	<input type="checkbox"/>
Answer	Football	<input type="checkbox"/>
Answer	Golf	<input type="checkbox"/>
Answer	Tennis	<input checked="" type="checkbox"/>
Answer	Hunting	<input type="checkbox"/>
Answer	Other outdoor	<input type="checkbox"/>
Answer	Theater	<input type="checkbox"/>
Answer	Literature	<input type="checkbox"/>
Answer	Design	<input type="checkbox"/>
Question	Marital Status	<input type="checkbox"/>
Answer	Married	<input checked="" type="checkbox"/>
Answer	Children	<input type="checkbox"/>
Question	Educational level	<input type="checkbox"/>
Answer	Master/ Ph.d	<input checked="" type="checkbox"/>
Answer	Bachelor	<input type="checkbox"/>
Answer	Skilled	<input type="checkbox"/>

Contact Card- Company-new person – profile II

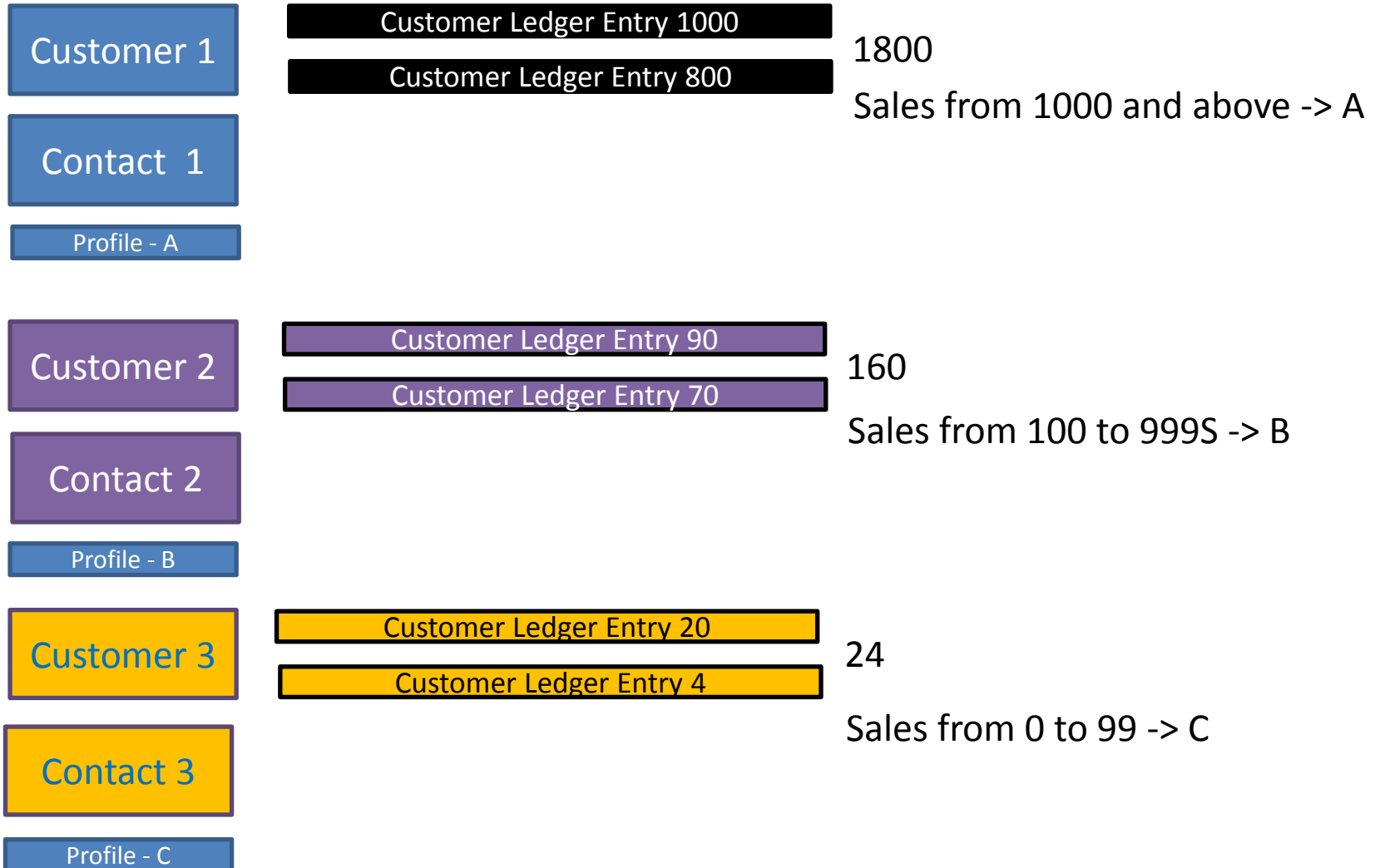
Edit - Contact Profile Answers - CT200021 Hans Visser

Search Edit List

Profile Questionnaire Code PERSON

Type	Description	Set
Answer	Design	<input type="checkbox"/>
Question	Marital Status	<input type="checkbox"/>
Answer	Married	<input type="checkbox"/>
Answer	Children	<input checked="" type="checkbox"/>
Question	Educational level	<input type="checkbox"/>
Answer	Master/ Ph.d	<input type="checkbox"/>
Answer	Bachelor	<input checked="" type="checkbox"/>
Answer	Skilled	<input type="checkbox"/>
Question	Personality	<input type="checkbox"/>
Answer	Extrovert	<input type="checkbox"/>
Answer	Analytical	<input type="checkbox"/>
Question	Drinks	<input type="checkbox"/>
Answer	Wine	<input checked="" type="checkbox"/>
Answer	Beer	<input checked="" type="checkbox"/>
Answer	Lemonade	<input checked="" type="checkbox"/>
Answer	Water	<input checked="" type="checkbox"/>
Answer	Gin	<input checked="" type="checkbox"/>

Pareto analysis explanantion



Questionnaire modification-creation

Tell me what you want to do ↗ ✕

On current page (Contact Card)

Profiles
Open the Profile Questionnaires window.

Go to Pages and Tasks Show all (12)

Questionnaire Setup Administration

Requests to Approve Lists

Profile Questionnaire Setup |


Type	Description	Mul... Ans...	Priority	Auto Con... Clas...	From Value	To Value
→ Question <input type="button" value="v"/> <input type="button" value="⋮"/>	Pareto ABC	<input checked="" type="checkbox"/>	Normal	<input checked="" type="checkbox"/>		
Answer	A	<input type="checkbox"/>	Normal	<input type="checkbox"/>	7,001	20,000
Answer	B	<input type="checkbox"/>	Normal	<input type="checkbox"/>	201	7,000
Answer	C	<input type="checkbox"/>	Normal	<input type="checkbox"/>		200
Question	Drinks	<input checked="" type="checkbox"/>		<input type="checkbox"/>		
Answer	Whisky	<input type="checkbox"/>	Normal	<input type="checkbox"/>		
Answer	Gin	<input type="checkbox"/>	Normal	<input type="checkbox"/>		
Answer	Vodka	<input type="checkbox"/>	Normal	<input type="checkbox"/>		
Answer	Beer	<input type="checkbox"/>	Normal	<input type="checkbox"/>		

Pareto analysis-see extra example material

Questionnaire Setup | Work Date: 7/20/2022 ✓ Saved

Search + New Edit List Delete Edit Questionnaire Setup... Open in Excel

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
→ 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



**We create a new profile
named PARETO**

Pareto analysis –specification of questionnaire

Questionnaire Setup | Work Date: 7/20/2022

Search + New Edit List Delete Edit Questionnaire Setup... Open in Excel

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
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
→ PARETO	Pareto Analysis	Normal	Companies	CUST

Edit Questionnaire Setup...
Delete
Select More

PARETO | Work Date: 7/20/2022

Profile Questionnaire Setup | Search + New Edit List Delete Process Print/Send Line Open in Excel Actions Related Fewer options

Type	Description	Multiple Answers	Priority	Auto Contact Classification
→ Question		<input checked="" type="checkbox"/>	Normal	<input type="checkbox"/>

Question

There will be either A, B or C

Pareto analysis –specification of questionnaire

PARETO | Work Date: 7/20/2022

Profile Questionnaire Setup | Search + New Edit List Delete Process Print/Send Line Open in Excel Actions Related Fewer options

Type	Description	Multiple Answers	Priority	Auto Contact Classification
→ Question	:	<input checked="" type="checkbox"/>	Normal	<input type="checkbox"/>

PARETO 1 | Work Date: 2/17/2027 Not saved

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

Type	Description	Mul... Ans...	Priority	Auto Con... Clas...
→ Question		<input type="checkbox"/>	Normal	<input type="checkbox"/>

- Line >
- Question Details
- Answer Where-Used
- Update Classification
- Print
- More options

Next, you need to specify the Details of the question that will then be automatically evaluated

Pareto analysis –specification of questionnaire

Edit - Profile Question Details - PARETO · Pareto ABC

Answer Points Page | More options

General

Description Pareto ABC Multiple Answers

Classification

Auto Contact Classific... <input checked="" type="checkbox"/>	Starting Date Formula ... -5Y
Customer Class. Field ... Sales (LCY) ▼	Ending Date Formula ... CM
Vendor Class. Field [Greyed out]	Classification Method ... Defined Value ▼
Contact Class. Field [Greyed out]	Sorting Method [Greyed out]
Min. % Questions Ans... [Greyed out]	No. of Decimals [Greyed out]

We will analyze the sales amounts that are part of Customer Ledger Entries five years backwards (-5Y) and end the analysis in the current month (CM)

Pareto analysis –specification of questionnaire

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
→ Question	PARETO 1	<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 | Work Date: 7/20/2022

Profile Questionnaire Setup | Search | + New | Edit List | Delete | Process | Print/Send | Line | Open in Excel | Actions

Functions

- Update Classification
- Print
- Test Report

Pareto ABC

A
B
C

Values of limits are entered manually !!!!!

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 1	<input checked="" type="checkbox"/>		<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	6
Answer	C	<input type="checkbox"/>	Normal	<input type="checkbox"/>		99	51



Click

Pareto analysis – specification of questionnaire



The screenshot shows a CRM interface for 'Profile Contacts' as of 7/20/2022. The interface includes a search bar and action buttons: '+ New', 'Edit List', 'Delete', and 'Open in Excel'. A table lists contacts with columns for 'Contact No.', 'Contact Company Name', and 'Contact Name'. The first row, for 'The Cannon Group PLC', is highlighted with a red border.

Contact No. ↑	Contact Company Name	Contact Name
→ CT000007	The Cannon Group PLC	The Cannon Group PLC
CT000009	Selangorian Ltd.	Selangorian Ltd.
CT000011	John Haddock Insurance Co.	John Haddock Insurance Co.
CT000013	Deerfield Graphics Company	Deerfield Graphics Company
CT000019	Progressive Home Furnishings	Progressive Home Furnishings
CT000021	New Concepts Furniture	New Concepts Furniture
CT000031	Antarcticopy	Antarcticopy
CT000045	Heimilisprydi	Heimilisprydi
CT000053	BYT-KOMPLET s.r.o.	BYT-KOMPLET s.r.o.
CT000059	Designstudio Gmunden	Designstudio Gmunden
CT000078	Klubben	Klubben
CT000082	Beef House	Beef House
CT000084	Autohaus Mielberg KG	Autohaus Mielberg KG
CT000085	Hotel Pferdesee	Hotel Pferdesee

Pareto analysis –specification of questionnaire

Profile Contacts | Work Date: 7/20/2022

Search + New Edit List Delete Open in Excel

Contact No. ↑	Contact Company Name	Contact Name
→ CT000007	The Cannon Group PLC	The Cannon Group PLC
CT000009	Selangorian Ltd.	Selangorian Ltd.
CT000011	John Haddock Insurance Co.	John Haddock Insurance Co.
CT000059	Designstudio Gmunden	Designstudio Gmunden
CT000078	Klubben	Klubben
CT000082	Beef House	Beef House
CT000085	Hotel Pferdesee	Hotel Pferdesee

Open contact card



Pareto analysis – specification of questionnaire

Contact Card | Work Date: 7/20/2022

CT000007 · The Cannon Group PLC

Process Report [Open in Excel](#) | [Actions](#) [Related](#) [Reports](#) [Fewer options](#)

General

No. CT000007 Type Company

Name The Cannon Group PLC Company Name The Cannon Group PLC

Communication

Address

Address 192 Market Square

Address 2

Country/Region Code GB

Post Code B27 4KT

City Birmingham

Contact

Phone No.

Mobile Phone No.

Email the.cannon.group.plc@contoso.com

Home Page

Language Code ENG

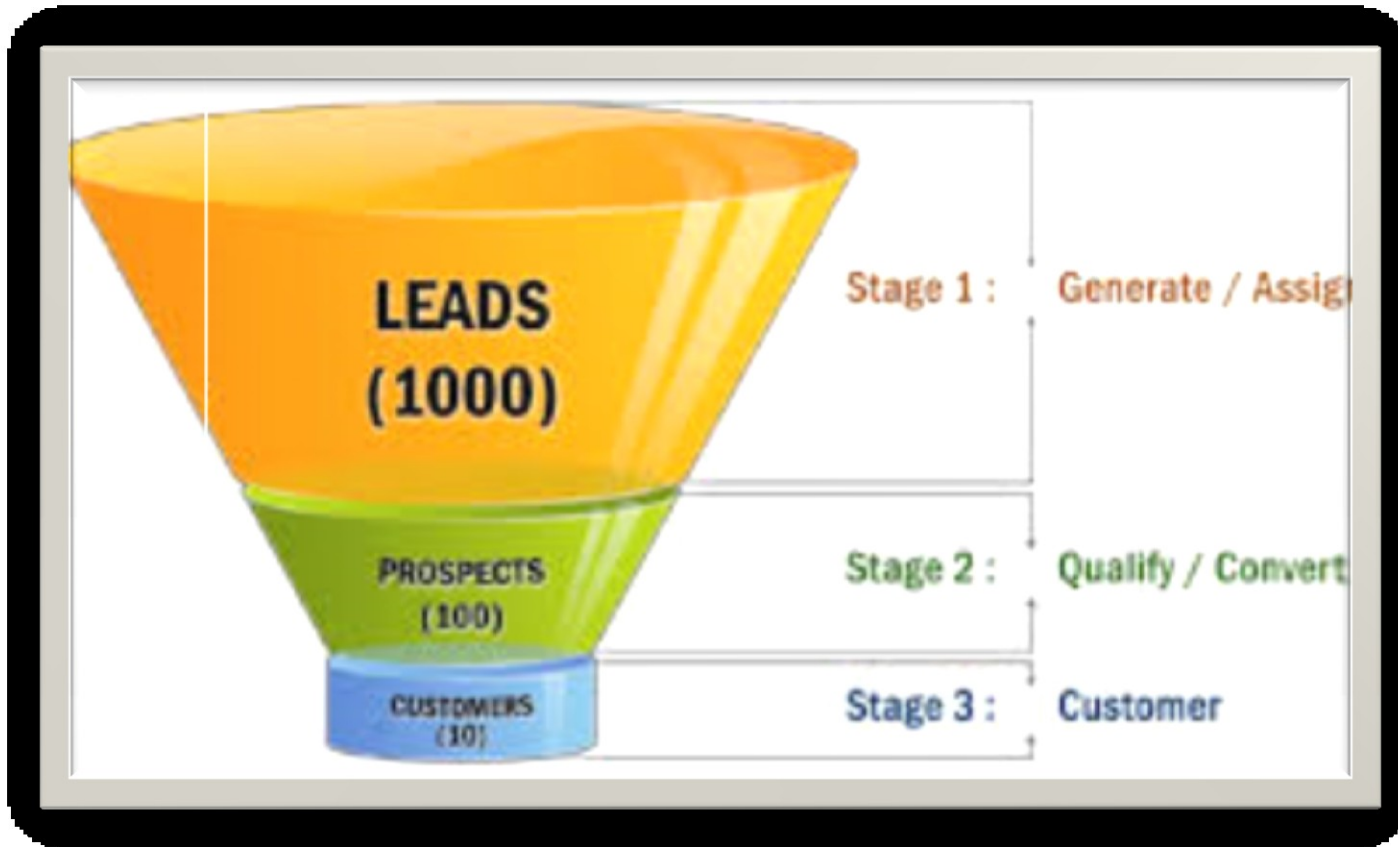
[Show Map](#)

Foreign Trade

Profile Questionnaire | [Manage](#)

Question	Answer	Questions Answered (%)	Last Date Updated
Discount (%) Last Year	Low discount usage		1/31/2022
Pareto ABC	A		9/23/2021
Customer Purchase Frequency, Last Year	> 5 times a year		1/31/2022
Customer Purchase Frequency, Current Year	> 5 times a year		1/31/2022
Turnover (LCY), Last Year	low (below 1,000)		1/31/2022
Turnover (LCY), Current Year	High (over 4,000)		1/31/2022
Discount (%) Current Year	Medium discount usage		1/31/2022
Profit (LCY) Current Year	Top 25 % of Customers		1/31/2022
Company Ownership	Stock Exchange		1/31/2022
No. of employees	1..99		1/31/2022

End of the section



Interactions

New interaction- use of wizard

← Contact Card | Work Date: 7/20/2022

CT000257 · John Miller

Process | Report | Page | Actions | Rel

Create Opportunity | Apply Template...

Create Interaction - CT000007 The Cannon Group PLC CT000257 John Miller

...

General

Contact John Miller ... Salesperson PS ▾

Interaction Template C... · INCOME ▾ Language Code ▾

Description Incoming phone call

Interaction Details Show less

Correspondence Type ... ▾ Cost (LCY) 20.00

Date of Interaction 7/20/2022 📅 Duration (Min.) 15

Time of Interaction 1:39:00 PM Campaign ▾

Information Flow Outbound ▾ Contact is Targeted

Initiated By Them ▾ Campaign Response


Evaluation Very Positive ▾ Opportunity ▾

Was Successful

OK Cancel

Interaction log entries

← Interaction Log Entries - CT000007 . The Cannon Group PLC - CT000257 . John Miller | Work Date: 7/20/2022

Search Process Entry  Open in Excel | More options

Can... ↑	Atte... Failed ↑	Date ↑	Interaction Template Code	Description	Attach...	Contact No.	Contact Name	Contact Company Name	Evaluation
<input type="checkbox"/>	:	7/20/2022	INCOME	Incoming phone call		CT000257	John Miller	The Cannon Group PLC	
<input type="checkbox"/>	<input type="checkbox"/>	7/20/2022	INCOME	Incoming phone call		CT000257	John Miller	The Cannon Group PLC	Very Positi

Another CRM area : Opportunity

From searching window

CRONUS International Ltd. | Sales ▾ | Posted Documents ▾ | Administration Sales/Purchase ▾ | Analysis ▾ | Setup & Extensions ▾

Opportunities: All ▾ | 🔍 Search | + New | 🗑️ Delete | ↻ Create Sales Quote | 📄 Postponed Interactions | 🔄 Update | ⏴ Close | ⚡ Activate First

No. ↑	Clos...	Creation Date	Description	Contact No.	Salesperson Code	Status	Current Sales Cycle Stage	Campaign No.
OP100001	<input checked="" type="checkbox"/>	11/6/2021	New tables	CT200116	BD	In Progress	Initial	
OP100002	<input type="checkbox"/>	12/6/2021	New tables	CT200097	BD	Not Started		
OP100003	<input type="checkbox"/>	12/6/2021	New tables	CT200094	BD	Not Started		
OP100004	<input type="checkbox"/>	12/6/2021	New tables	CT200091	BD	Not Started		
OP100005	<input type="checkbox"/>	12/6/2021	New tables	CT100002	BD	Not Started		
OP100006	<input type="checkbox"/>	12/6/2021	New tables	CT200107	BD	Not Started		
OP100007	<input type="checkbox"/>	12/6/2021	New tables	CT200112	BD	Not Started		
OP100008	<input type="checkbox"/>	12/6/2021	New tables	CT200127	BD	Not Started		
OP100009	<input type="checkbox"/>	12/6/2021	New tables	CT200002	BD	Not Started		
OP100010	<input checked="" type="checkbox"/>	12/6/2021	New tables	CT200122	BD	Not Started		
OP100011	<input type="checkbox"/>	12/6/2021	New tables	CT200001	BD	Not Started		
OP100012	<input type="checkbox"/>	12/6/2021	New tables	CT200101	BD	Not Started		
OP100013	<input type="checkbox"/>	12/6/2021	New tables	CT200105	BD	Not Started		
OP100014	<input type="checkbox"/>	12/6/2021	New tables	CT200130	BD	Not Started		
OP100015	<input checked="" type="checkbox"/>	1/5/2022	Assembling furniture	CT200136	PS	Won		
OP100016	<input checked="" type="checkbox"/>	1/5/2022	Assembling furniture	CT000009	PS	Won		

Opportunity structure

Description	Assembling furniture	Salesperson Code	PS
Contact No.	CT200136	Sales Cycle Code	EX-LARGE
Contact Name	Mindy Martin	Status	Won

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"/>	Won	0		1/27/2022	1/27/2022	9,000.00	9,000.00	100	100	100
<input type="checkbox"/>	Next	5	Sign Contract	1/18/2022	1/20/2022	9,000.00	8,122.50	95	95	90
<input type="checkbox"/>	Next	4	Proposal	1/14/2022	1/20/2022	9,000.00	5,355.00	85	70	60
<input type="checkbox"/>	Next	3	Product Presentation/Workshop	1/12/2022	1/20/2022	12,000.00	3,780.00	70	45	32
<input type="checkbox"/>	Next	2	Understanding needs meeting	1/8/2022	1/20/2022	10,000.00	1,050.00	35	30	11
<input type="checkbox"/>		1	Initial	1/7/2022	1/20/2022	10,000.00	20.00	2	10	0

Search	New	Edit List	Delete	Statistics	Stages	Open in Excel
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Code ↑	Description
EX-LARGE	Existing customer - Large acc.
EX-SMALL	Existing customer - Small acc.
FIRSTLARGE	First time - Large account
FIRSTSMALL	First time - Small account



Sale Cycle Stages

Stage ↑	Description	Completed %	Chances of Success %	Activity Code	Quote Required	Allow Skip	Date Formula
1	Initial	2	10	INIT	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
2	Understanding needs meeting	35	25	NEEDS	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
3	Product Presentation/Workshop	70	60	P-WORK	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
4	Proposal	85	80	PROPOSAL	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
5	Sign Contract	95	100	SIGN	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

Opportunity creation

Opportunity Card | Work Date: 7/20/2022 ✎ + 🗑 ✓ Saved 🔗

OP000001 · Business Central Implementation

Process Opportunity | Actions Related Fewer options

🔗 Create Sales Quote 🔥 **Activate First Stage** 🔄 Create Interaction 📄 Show Sales Quote

Description Salesperson Code

Contact No. Sales Cycle Code

Contact Name Chris McGurk Status Not Started

Sales Cycle Stages | Manage 🔗

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 %

? Would you like to activate first stage for this opportunity?

Sales Cycle Stages | Manage 🔗

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	7/20/2022	7/20/2022	0.00	0.00	2	20	11

Process Opportunity | Actions Related Fewer options

🔗 Create Sales Quote 🔄 **Update** 📉 Close 🔄 Create Interaction 📄 Show Sales Quote

Opportunity creation

Update Opportunity - CT100011 Add-ON Marketing CT100190 Chris McGurk

Action Type Next

Sales Cycle Stage 2

Sales Cycle Stage Description Presentation

Date of Change 7/20/2022

Estimated sales value (LCY) 100,000.00

Chances of Success (%) 50

Estimated Closing Date 7/20/2022

Cancel Existing Open Tasks

OK Cancel

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	7/20/2022	7/20/2022	100,000.00	50,000.00	50	50	50
<input type="checkbox"/>	:	1	Initial	7/20/2022	7/20/2022	0.00	0.00	2	20	11

Next stage is dependent on a new document creation

Opportunity creation- new stage

Process Opportunity **Actions**

Functions ▾

- Update
- Close
- Create Sales Quote**
- Print Details
- Create Interaction

Sales Quote | Work Date: 7/20/2022

1001 · Add-ON Marketing

Process Quote Request Approval Print/Send Release Navigate More options

General Show more

Customer Name: Add-ON Marketing ... Due Date: 7/20/2022 📅

External Document No.: Requested Delivery Date: 📅

Contact: Chris McGurk Status: **Open**

Lines | Manage More options 📄

Type	Description	Location Code	Quantity	Qty. to Assemble to Order	Unit of Measure Code	Unit Price Excl. VAT	Line Discount %	Line Amount Excl. VAT
→ G/L Account	Service Contract Sale		1,000	0 ...	HOUR	80.00		80,000.00

Subtotal Excl. VAT (USD) 80,000.00 Total Excl. VAT (USD) 80,000.00

Inv. Discount Amount Excl. VAT (U... 0.00 Total VAT (USD) 8,000.00

Invoice Discount % 0 Total Incl. VAT (USD) 88,000.00

Invoice Details > USD 7/20/2022

Opportunity creation – after Sales Quotation

Update Opportunity - CT100011 Add-ON Marketing CT100190 Chris McGurk ↗ ✕

...

Action Type	Next	▼
Sales Cycle Stage		3
Sales Cycle Stage Description	Proposal	
Date of Change	7/20/2022	📅
Estimated sales value (LCY)		51,905.92
Chances of Success (%)		90
Estimated Closing Date	7/20/2022	📅
Cancel Existing Open Tasks	<input checked="" type="checkbox"/>	

Opportunity creation – after Sales Quotation

Sales Cycle Stages		Manage								
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	7/20/2022	7/20/2022	51,905.92	44,120.03	80	90	85
<input checked="" type="checkbox"/>	Next	2	Presentation	7/20/2022	7/20/2022	100,000.00	50,000.00	50	50	50
→ <input type="checkbox"/>	⋮	1	Initial	7/20/2022	7/20/2022	0.00	0.00	2	20	11

Next update

Sales Cycle Stages		Manage								
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	4	Sign Contract	7/20/2022	7/20/2022	70,000.00	61,250.00	95	80	88
<input checked="" type="checkbox"/>	Next	3	Proposal	7/20/2022	7/20/2022	51,905.92	44,120.03	80	90	85
<input checked="" type="checkbox"/>	Next	2	Presentation	7/20/2022	7/20/2022	100,000.00	50,000.00	50	50	50
> <input type="checkbox"/>	⋮	1	Initial	7/20/2022	7/20/2022	0.00	0.00	2	20	11

Opportunity Card | Work Date: 7/20/2022

OP000001 · Business

Process Opportunity **Actions**

⚡ Functions

- 🔄 Update
- ⏏ Close**
- 📄 Create Sales Quote
- 🖨 Print Details
- 🔄 Create Interaction


Opportunity creation – closing

Close Opportunity - CT100011 Add-ON Marketing CT100190 Chris McGurk

General

Opportunity Status	Won	Sales (LCY)	51,905.92
Close Opportunity Code	CONSULT_W	Cancel Old Tasks	<input checked="" type="checkbox"/>
Closing Date	7/31/2022		

OK Cancel

 The Customer record has been created.

OK

Opportunity successfully processed

Opportunity Card | Work Date: 7/20/2022 ✓ Saved

OP000001 · Business Central Implementation

Process Opportunity | Actions Related Fewer options

No.	OP000001	Sales Document No.	1001
Description	Business Central Implementation	Campaign No.	
Contact No.	CT100190	Priority	Normal
Contact Name	Chris McGurk	Sales Cycle Code	EX-SMALL
Phone No.		Status	Won
Mobile Phone No.		Closed	<input type="checkbox"/>
Email	chris.mcgurk@contoso.com	Creation Date	7/20/2022
Contact Company Name	Add-ON Marketing	Date Closed	7/31/2022
Salesperson Code	BD	Segment No.	
Sales Document Type	Quote		

Sales Cycle Stages | Manage

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"/>	Won	0		7/31/2022	7/31/2022	100,000.00	51,905.92	100	100	100
<input checked="" type="checkbox"/>	Next	4	Sign Contract	7/31/2022	7/31/2022	100,000.00	97,500.00	95	100	98
<input checked="" type="checkbox"/>	Next	4	Sign Contract	7/20/2022	7/20/2022	51,905.92	45,417.68	95	80	88
<input checked="" type="checkbox"/>	Next	4	Sign Contract	7/20/2022	7/20/2022	70,000.00	61,250.00	95	80	88
<input checked="" type="checkbox"/>	Next	3	Proposal	7/20/2022	7/20/2022	51,905.92	44,120.03	80	90	85
<input checked="" type="checkbox"/>	Next	2	Presentation	7/20/2022	7/20/2022	100,000.00	50,000.00	50	50	50
<input type="checkbox"/>		1	Initial	7/20/2022	7/20/2022	0.00	0.00	2	20	11

Personal profile modificatoins

Personal profile creation (from Contact card OR Search window)

The image shows a software interface for a contact card. The top bar includes a back arrow, the text "Contact Card | Work Date: 7/20/2022", and the contact name "CT100223 · Magnus Hedlund". Below this is a navigation bar with "Process", "Report", "Page", "Actions", "Related" (highlighted with a red box), "Reports", and "Fewer options". A dropdown menu is open under "Contact", listing "Company", "Person", "Profiles" (highlighted with a red box), "Comments", and "Alternative Address". A "Job Responsibilities" window is also visible. In the foreground, a search window titled "Tell me what you want to do" contains a search bar with "questio" (highlighted with a red box). Below the search bar, the results are categorized into "On current page (Contact Card)" and "Go to Pages and Tasks". Under "On current page (Contact Card)", there is a "Profiles" option with the subtext "Open the Profile Questionnaires window.". Under "Go to Pages and Tasks", there are two items: "Questionnaire Setup" (with "Administration" to its right) and "Configuration Questionnaire" (with "Lists" to its right). The "Questionnaire Setup" item is highlighted with a red box.

Personal profile creation

Questionnaire Setup | Work Date: 7/20/2022 ✓ Saved

Search + New Edit List Delete Edit Questionnaire Setup... Open in Excel

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
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

You have to EDIT Questionnaire ->

Personal profile creation

PERSON | Work Date: 7/20/2022 ✓ Saved

Profile Questionnaire Setup | Search + New Edit List Delete Process Print/Send Line Open In Excel | More options

Type	Description	Multiple Answers	Priority	Auto Contact Classification	From Value	To Value	No. of Contacts
Question	Sex	<input type="checkbox"/>		<input type="checkbox"/>			-
Answer	Male	<input type="checkbox"/>	Low	<input type="checkbox"/>			152
Answer	Female	<input type="checkbox"/>	Low	<input type="checkbox"/>			96
Question	Hobbies	<input checked="" type="checkbox"/>		<input type="checkbox"/>			-
Answer	Football	<input type="checkbox"/>	Low	<input type="checkbox"/>			50
Answer	Golf	<input type="checkbox"/>	Low	<input type="checkbox"/>			86
Answer	Tennis	<input type="checkbox"/>	Low	<input type="checkbox"/>			82
Answer	Hunting	<input type="checkbox"/>	Low	<input type="checkbox"/>			66
Answer	Other outdoor	<input type="checkbox"/>	Low	<input type="checkbox"/>			67
Answer	Theater	<input type="checkbox"/>	Low	<input type="checkbox"/>			48
Answer	Literature	<input type="checkbox"/>	Low	<input type="checkbox"/>			29
Answer	Design	<input type="checkbox"/>	Low	<input type="checkbox"/>			32
Question	Marital Status	<input checked="" type="checkbox"/>		<input type="checkbox"/>			-
Answer	Married	<input type="checkbox"/>	Low	<input type="checkbox"/>			116
Answer	Children	<input type="checkbox"/>	Low	<input type="checkbox"/>			102
Question	Educational level	<input type="checkbox"/>		<input type="checkbox"/>			-
Answer	Master/ Ph.d	<input type="checkbox"/>	Normal	<input type="checkbox"/>			10
Answer	Bachelor	<input type="checkbox"/>	Normal	<input type="checkbox"/>			58
Answer	Skilled	<input type="checkbox"/>	Normal	<input type="checkbox"/>			123
Question	Personality	<input checked="" type="checkbox"/>		<input type="checkbox"/>			-
Answer	Extrovert	<input type="checkbox"/>	Normal	<input type="checkbox"/>			74
Answer	Analytical	<input type="checkbox"/>	Normal	<input type="checkbox"/>			40
→ Question	Drinks	<input checked="" type="checkbox"/>		<input type="checkbox"/>			-
Answer	Water	<input type="checkbox"/>	Normal	<input type="checkbox"/>			-
Answer	Whisky	<input type="checkbox"/>	Normal	<input type="checkbox"/>			-
Answer	Beer	<input type="checkbox"/>	Normal	<input type="checkbox"/>			-
Answer	Wine	<input type="checkbox"/>	Normal	<input type="checkbox"/>			-

Personal profile creation

Contact Card | Work Date: 7/20/2022

CT200006 · Mark McArthur

Process Report Page | Actions Related Reports Fewer options

General

No. CT200006 Name Mark McArthur Company Name
Type Person

Communication

Address
Address 65-73 Broadway West
Address 2
Country/Region Code GB
Post Code BR1 2ES
City Bromley


Contact
Phone No.
Mobile Phone No.
Email markmcarthur@contoso.com
Home Page
Language Code ENG

[Show Map](#)

Foreign Trade >

Profile Questionnaire | Manage

Question	Answer	Questions Answered (%)	Last Date Updated
→ Personality	Extrovert		1/31/2022
Hobbies	Tennis		1/31/2022
Sex	Male		1/31/2022

 Click

Personal profile creation

Profile Questionnaire Code PERSON ...

Type	Description	Set
Question	Sex	<input type="checkbox"/>
Answer	Male	<input checked="" type="checkbox"/>
Answer	Female	<input type="checkbox"/>
Question	Hobbies	<input type="checkbox"/>
Answer	Football	<input type="checkbox"/>
Answer	Golf	<input type="checkbox"/>

Foreign Trade >

Profile Questionnaire | Manage

Question	Answer	Questions Answered (%)	Last Date Updated
Drinks	Wine		9/23/2021
Drinks	Beer		9/23/2021
Drinks	Whisky		9/23/2021
→ Personality	Extrovert		1/31/2022
Hobbies	Tennis		1/31/2022
Sex	Male		1/31/2022

Answer	Bachelor	<input type="checkbox"/>
Answer	Skilled	<input type="checkbox"/>
Question	Personality	<input type="checkbox"/>
Answer	Extrovert	<input checked="" type="checkbox"/>
Answer	Analytical	<input type="checkbox"/>
Question	Drinks	<input type="checkbox"/>
Answer	Water	<input type="checkbox"/>
Answer	Whisky	<input checked="" type="checkbox"/>
Answer	Beer	<input checked="" type="checkbox"/>
→ Answer	Wine	<input checked="" type="checkbox"/>

Personal profile creation – back to setup

Question	Marital Status	<input checked="" type="checkbox"/>						
Answer	Married	<input type="checkbox"/>	Low	<input type="checkbox"/>				116
Answer	Children	<input type="checkbox"/>	Low	<input type="checkbox"/>				102
Question	Educational level	<input type="checkbox"/>		<input type="checkbox"/>				-
Answer	Master/ Ph.d	<input type="checkbox"/>	Normal	<input type="checkbox"/>				10
Answer	Bachelor	<input type="checkbox"/>	Normal	<input type="checkbox"/>				58
Answer	Skilled	<input type="checkbox"/>	Normal	<input type="checkbox"/>				123
Question	Personality	<input checked="" type="checkbox"/>		<input type="checkbox"/>				-
Answer	Extrovert	<input type="checkbox"/>	Normal	<input type="checkbox"/>				74
Answer	Analytical	<input type="checkbox"/>	Normal	<input type="checkbox"/>				40
Question	Drinks	<input checked="" type="checkbox"/>		<input type="checkbox"/>				-
Answer	Water	<input type="checkbox"/>	Normal	<input type="checkbox"/>				-
Answer	Whisky	<input type="checkbox"/>	Normal	<input type="checkbox"/>				1
Answer	Beer	<input type="checkbox"/>	Normal	<input type="checkbox"/>				1
Answer	Wine	<input type="checkbox"/>	Normal	<input type="checkbox"/>				1

