

# 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

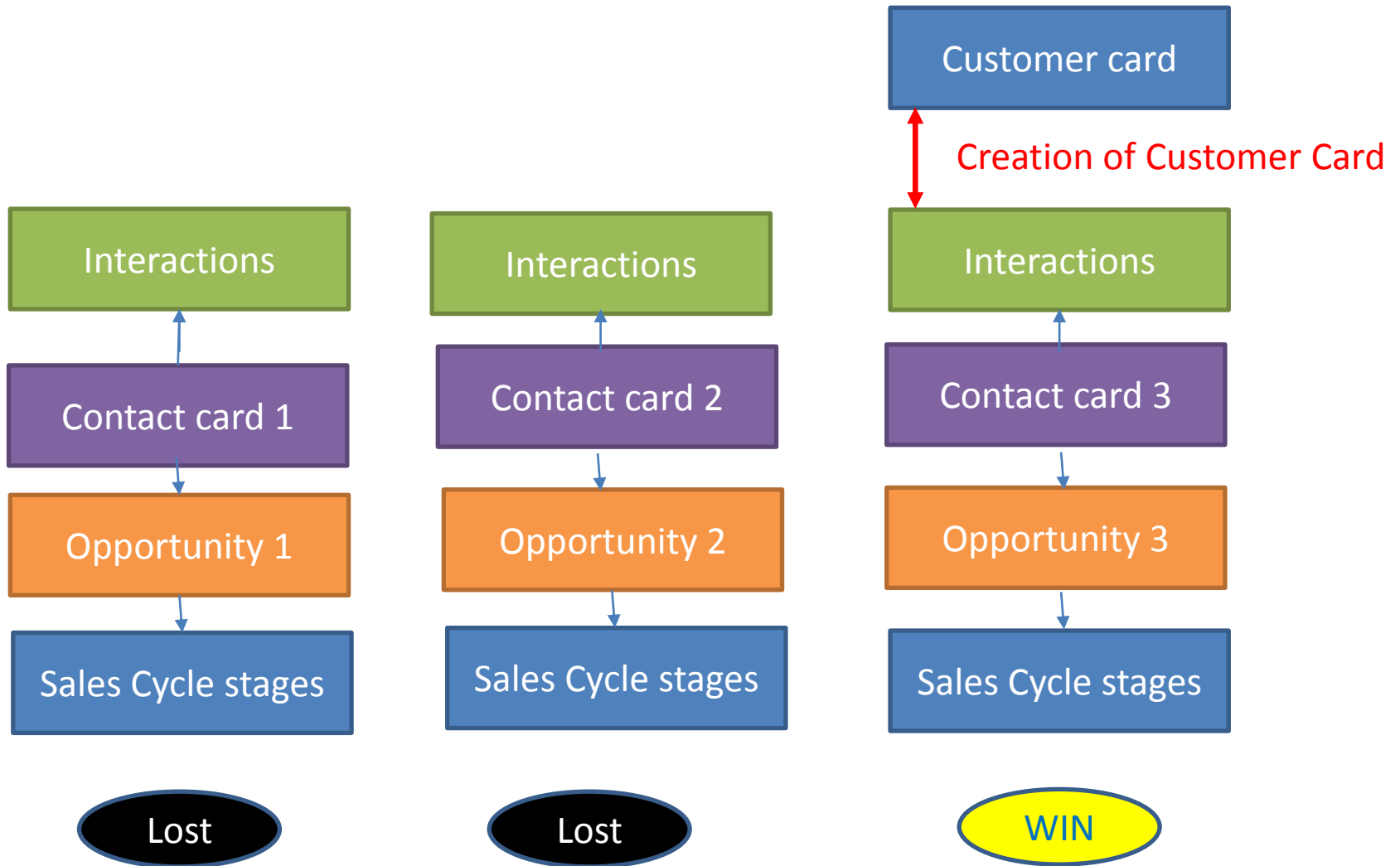
Vendor	2013 Revenue	2013 Share (%)	2012 Revenue	2012 Share (%)
Salesforce.com CRM	3,292	16.1	2,525.6	14.0
SAP AG	2,622	12.8	2,327.1	12.9
Oracle	2,097	10.2	2,015.2	11.1
Microsoft Dynamics CRM	1,392	6.8	1,135.3	6.3
Others	11,076	54.1	10,086.8	55.7
<b>Total</b>	<b>20,476</b>	<b>100</b>	<b>18,090</b>	<b>100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

*figures in millions of US dollars*

Source:

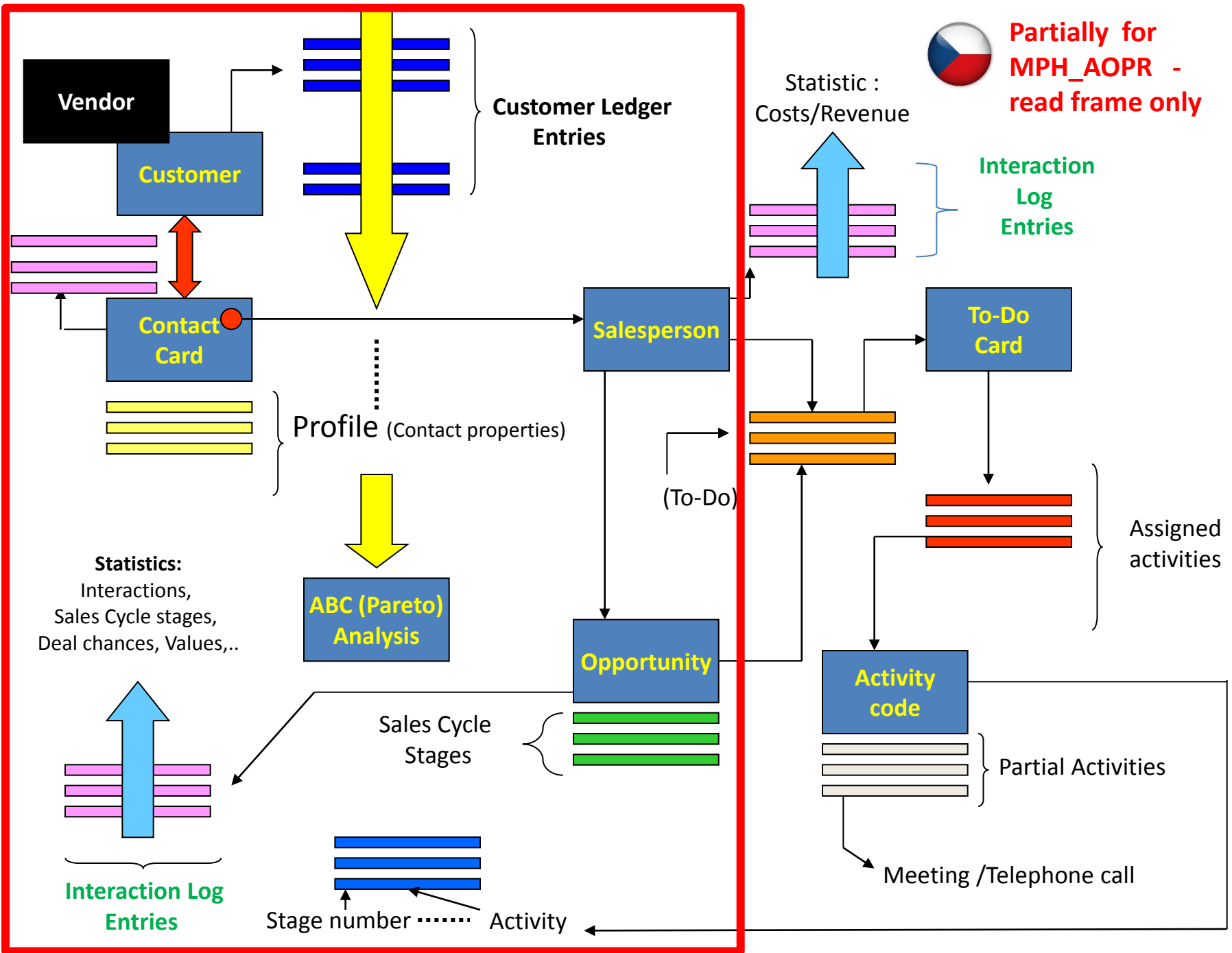
^ "Gartner Says Worldwide Customer Relationship Management Market Grew 23 Percent in 2007" [\(Press release\)](#). Gartner, Inc. 12 September 2008. Retrieved 2008-08-15.

# Customer (Vendor)-Contact Cards





**Partially for MPH\_AOPR - read frame only**



**Interaction Log Entries**

Stage number ..... Activity

Statistic : Costs/Revenue

**Interaction Log Entries**

**Assigned activities**

**Partial Activities**

Meeting /Telephone call

### 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 or Vendor
- Contact card- person -> Customer or Vendor
- Contact Character– profiles, technologies, market segment,...
- Interactions (driven mostly by wizard) – telephones , meetings, presentations, business lunches
- Business Opportunities (estimated close date and value of the deal, 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
<a href="#">CT200081</a>	⋮ 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
<b>CT100006</b>	<b>A. Gibson's Law Firm</b>		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
<b>CT100011</b>	<b>Add-ON Marketing</b>		add-on.marketing@contoso.com	DC	FOREIGN

Customer->Related->Customer->Other->Contact **OR** Searching window



Contact of selected Customer

List of all Contacts

# 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, The Cannon Group PLC

Bank Accounts

Direct Debit Mandates

Ship-to Addresses: 169,338.37, 168,364.41

Contact: 192 Market Square, Contact Name: Mr. Andy Teal

Credit Limit (LCY): 0.00

Blocked

Total Sales: 18,167.93

Costs (LCY): 12,737.70

Customer Picture

Sell-to Customer Sales History

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**

Try to find  
Contact  
CT000053 !!!!!

# Contact cards

No.	Name ↑	Phone No.	Email	Salesperson Code	Territory Code
<b>CT000007</b>	<b>The Cannon Group PLC</b>		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

# Contact Profile

Contact Card | Work Date: 02.12.2027

CT000053 · BYT-KOMPLET s.r.o.

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

Comments Statistics Customer **Profiles** Vendor



### Edit - Contact Profile Answers - CT000053 BYT-KOMPLET s.r.o.

Search Edit List

Profile Questionnaire Code ..... COMPANY

Type	Description
→ <b>Question</b>	<b>No. of employees</b>
Answer	1..99
Answer	100..499
Answer	500..999
Answer	1000+
<b>Question</b>	<b>Company Ownership</b>
Answer	Stock Exchange
Answer	Family
Answer	Foundation
Answer	Government
Answer	Institution
<b>Question</b>	<b>Additional Business Relations</b>
Answer	Partner

# Questionnaire Setup (to create profiles) 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 🔖 📄 ↗

+ 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"/>
<b>Question</b>	<b>Marital Status</b>	<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"/>
<b>Question</b>	<b>Educational level</b>	<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"/>
<b>Question</b>	<b>Personality</b>	<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"/>
<b>Question</b>	<b>Drinks</b>	<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  
(If asked)



# 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
→ <a href="#">Discount (%) Last Year</a>	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

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**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](#)

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**Foreign Trade** Show more

Currency Code ..... ▾

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Profile Questionnaire | Manage 🔗

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

# 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

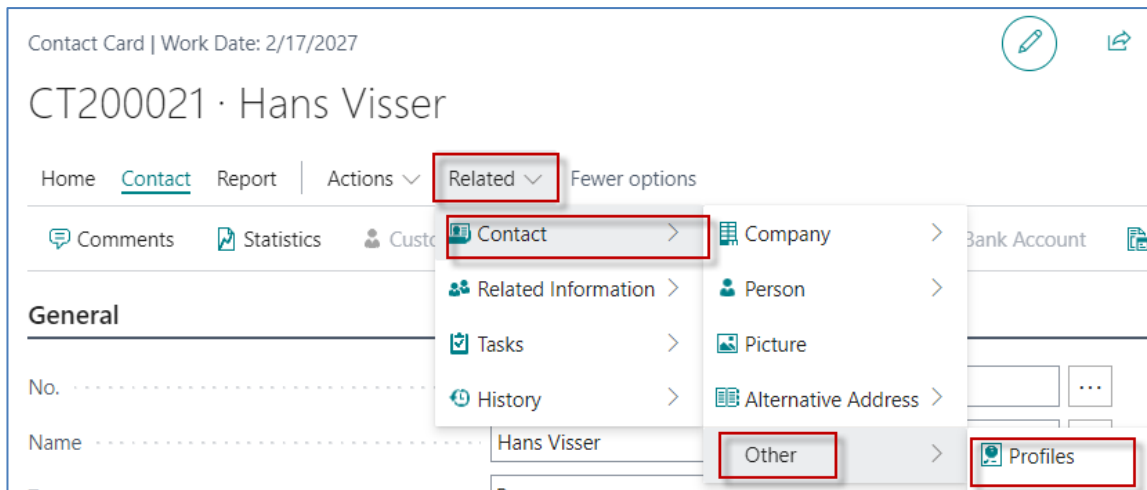
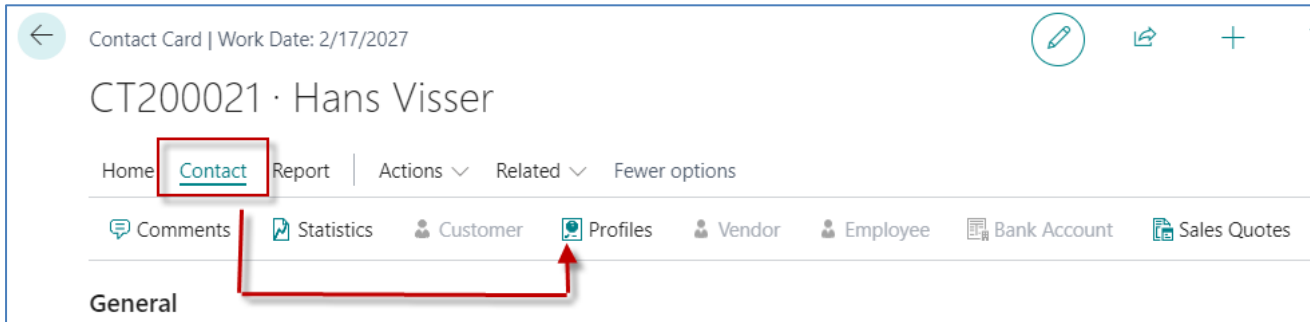
**Communication** Show more

<b>Address</b>	<b>Contact</b>		
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
<b>Question</b>	<b>Sex</b>	<input type="checkbox"/>
Answer	Male	<input checked="" type="checkbox"/>
Answer	Female	<input type="checkbox"/>
<b>Question</b>	<b>Hobbies</b>	<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"/>
<b>Question</b>	<b>Marital Status</b>	<input type="checkbox"/>
Answer	Married	<input checked="" type="checkbox"/>
Answer	Children	<input type="checkbox"/>
<b>Question</b>	<b>Educational level</b>	<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

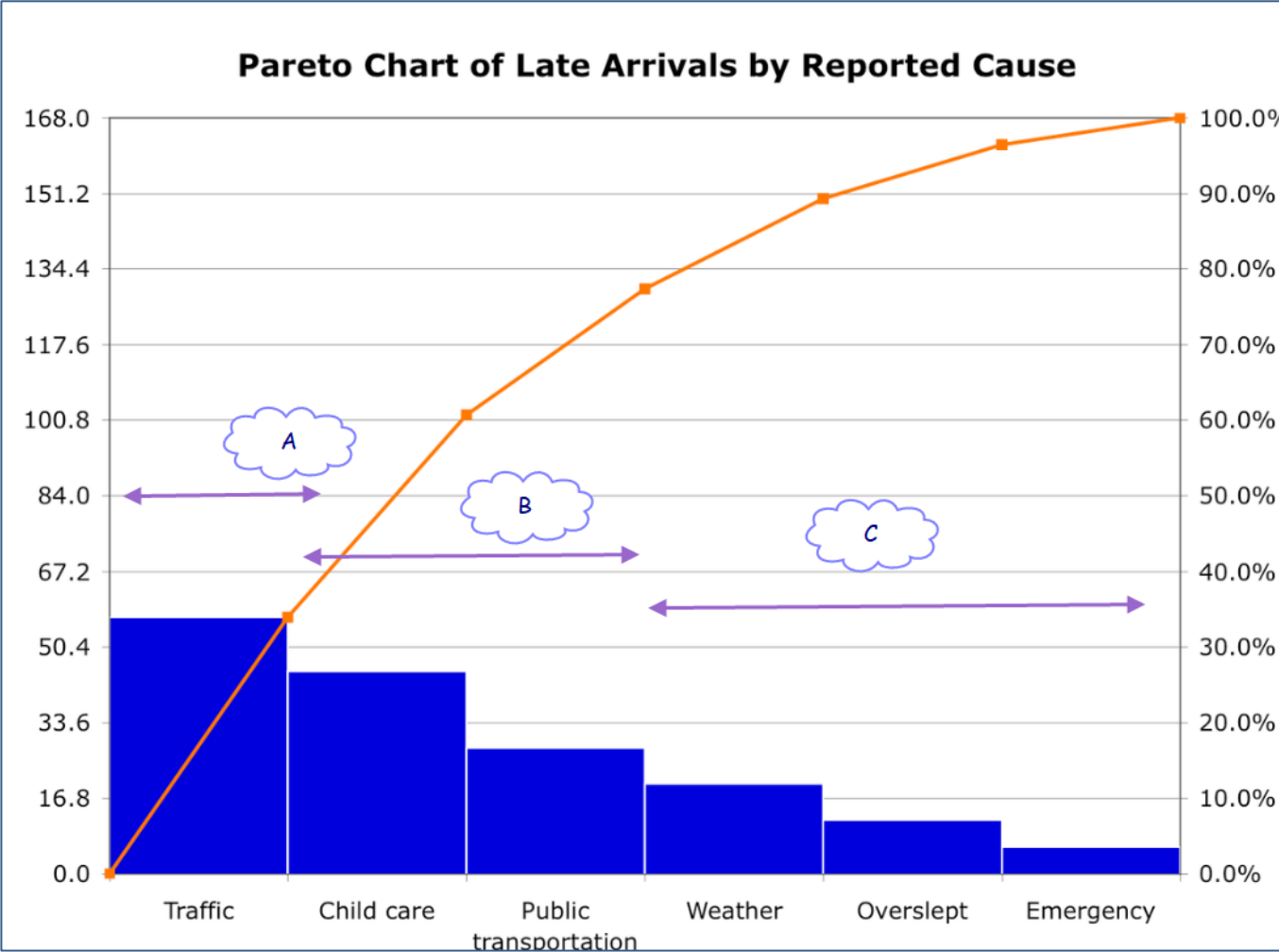
Edit - Contact Profile Answers - CT200021 Hans Visser

Search Edit List

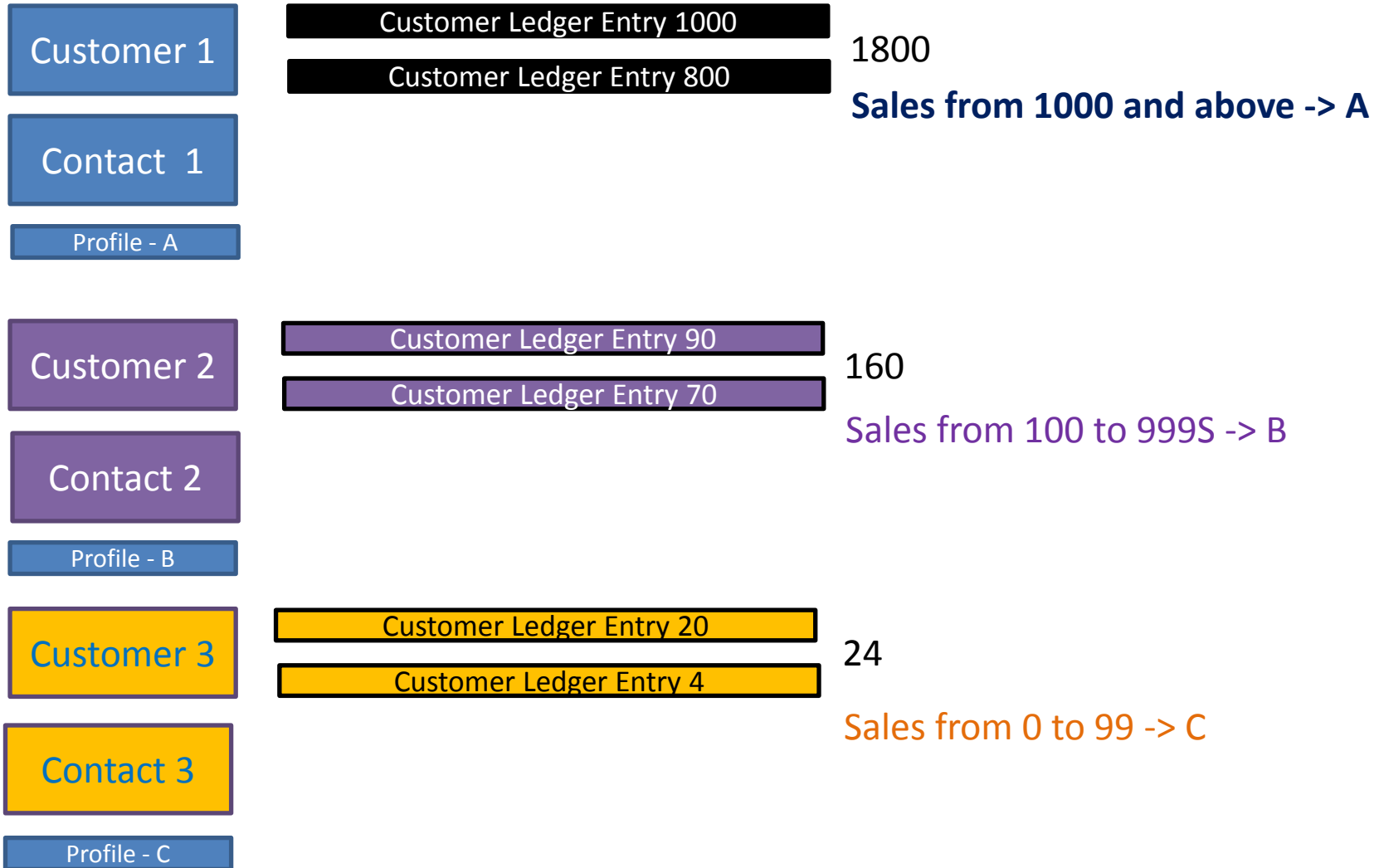
Profile Questionnaire Code PERSON

Type	Description	Set
Answer	Design	<input type="checkbox"/>
<b>Question</b>	<b>Marital Status</b>	<input type="checkbox"/>
Answer	Married	<input type="checkbox"/>
Answer	Children	<input checked="" type="checkbox"/>
<b>Question</b>	<b>Educational level</b>	<input type="checkbox"/>
Answer	Master/ Ph.d	<input type="checkbox"/>
Answer	Bachelor	<input checked="" type="checkbox"/>
Answer	Skilled	<input type="checkbox"/>
<b>Question</b>	<b>Personality</b>	<input type="checkbox"/>
Answer	Extrovert	<input type="checkbox"/>
Answer	Analytical	<input type="checkbox"/>
<b>Question</b>	<b>Drinks</b>	<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 - as you know from your seminar papers



# Pareto analysis creation explanation





# 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
→ <b>Question</b> <input type="button" value="v"/> <input type="button" value="⋮"/>	<b>Pareto ABC</b>	<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
<b>Question</b>	<b>Drinks</b>	<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 AOPR (this is only suggestion)**

# 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

# Question Details – 1st approach to access it

PARETO AOPR | Work Date: 02.12.2027

Profile Questionnaire Setup | Search + New Edit List

Type	Description
→ Question	PARETO AOPR

- Move Up
- Move Down
- Line
- Question Details
- Delete
- Select More

Edit - Profile Question Details - PARETO AOPR · PARETO AOPR

Answer Points Page

**General**

Description: PARETO AOPR Multiple Answers:

**Classification**

Auto Contact Classific...:  Starting Date Formula: -5Y

Customer Class. Field: Sales (LCY) Ending Date Formula: CM

Vendor Class. Field: Classification Method: Defined Value

Contact Class. Field: Sorting Method:

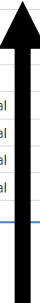
Min. % Questions Ans...: No. of Decimals:

# Answers setup - 1st approach and UPDATE Classification

PARETO AOPR | Work Date: 02.12.2027

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 AOPR	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>			-
Answer	A	<input type="checkbox"/>	Normal	<input type="checkbox"/>	1 000	10 000	17
Answer	B	<input type="checkbox"/>	Normal	<input type="checkbox"/>	100	999	10
Answer	C	<input type="checkbox"/>	Normal	<input type="checkbox"/>		99	54
→ Answer		<input type="checkbox"/>	Normal	<input type="checkbox"/>			



# UPDATE Classification

# Questionnaires after update link to Contact card

PARETO AOPR | Work Date: 02.12.2027

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
<b>Question</b>	<b>PARETO AOPR</b>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>			-
Answer	A	<input type="checkbox"/>	Normal	<input type="checkbox"/>	1 000	10 000	17
Answer	B	<input type="checkbox"/>	Normal	<input type="checkbox"/>	100	999	10
Answer	C	<input type="checkbox"/>	Normal	<input type="checkbox"/>		99	54
→ Answer		<input type="checkbox"/>	Normal	<input type="checkbox"/>			

Profile Questionnaire | New Line | Delete Line

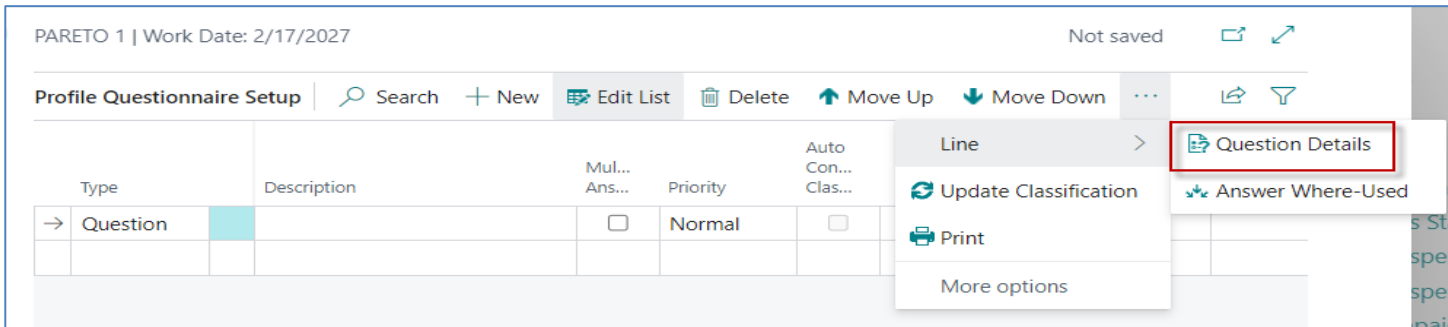
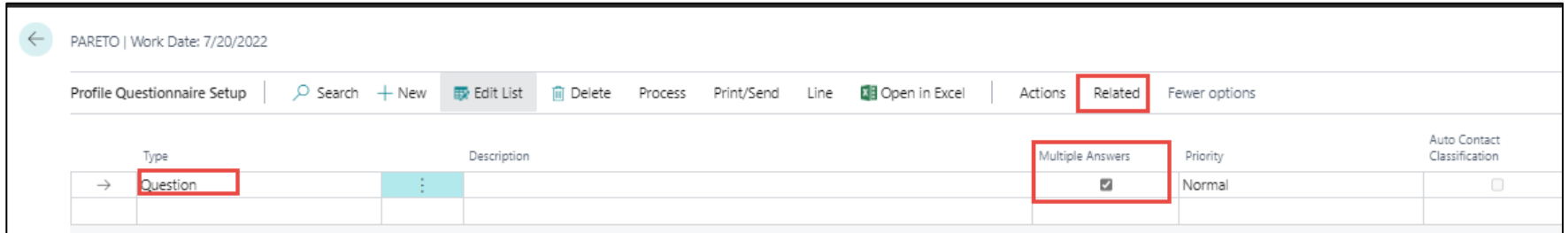
Question	Answer
→ <u>Discount (%) Last Year</u>	⋮ Low discount usage
Discount (%) Current Year	⋮ High discount usage
PARETO AOPR	A

Profile Contacts | Work Date: 02.12.2027

Search | + New | Edit List | Delete

Contact No.†	Contact Company Name	Contact Name
→ CT000013	Deerfield Graphics Company	Deerfield Graphics Company
CT000019	Progressive Home Furnishings	Progressive Home Furnishings
CT000031	Antarcticopy	Antarcticopy
CT000045	Heimilisprydi	Heimilisprydi
CT000053	BYT-KOMPLET s.r.o.	BYT-KOMPLET s.r.o.
CT000082	Beef House	Beef House
CT000084	Autohaus Mielberg KG	Autohaus Mielberg KG
CT000257	KPS Brno	KPS Brno
CT000258	IBM provider Est London	IBM provider Est London
CT000264	Královopolská strojírna Ltd.	Královopolská strojírna Ltd.
CT000265	Strojírna SKY	Strojírna SKY
CT000266	Software Kings	Software Kings
CT000271	Jundrov Machinery	Jundrov Machinery
CT000274	King of Furtinure	King of Furtinure
CT000275	Kings of furniture	Kings of furniture
CT000276	Ingegneri di precisione	Ingegneri di precisione
CT000277	Malta Machinery	Malta Machinery

# Pareto 2nd approach of Question Details specification



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

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 !!!!!!!

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

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.
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
→ <a href="#">CT000007</a>	The Cannon Group PLC	The Cannon Group PLC
<a href="#">CT000009</a>	Selangorian Ltd.	Selangorian Ltd.
<a href="#">CT000011</a>	John Haddock Insurance Co.	John Haddock Insurance Co.
<a href="#">CT000059</a>	Designstudio Gmunden	Designstudio Gmunden
<a href="#">CT000078</a>	Klubben	Klubben
<a href="#">CT000082</a>	Beef House	Beef House
<a href="#">CT000085</a>	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

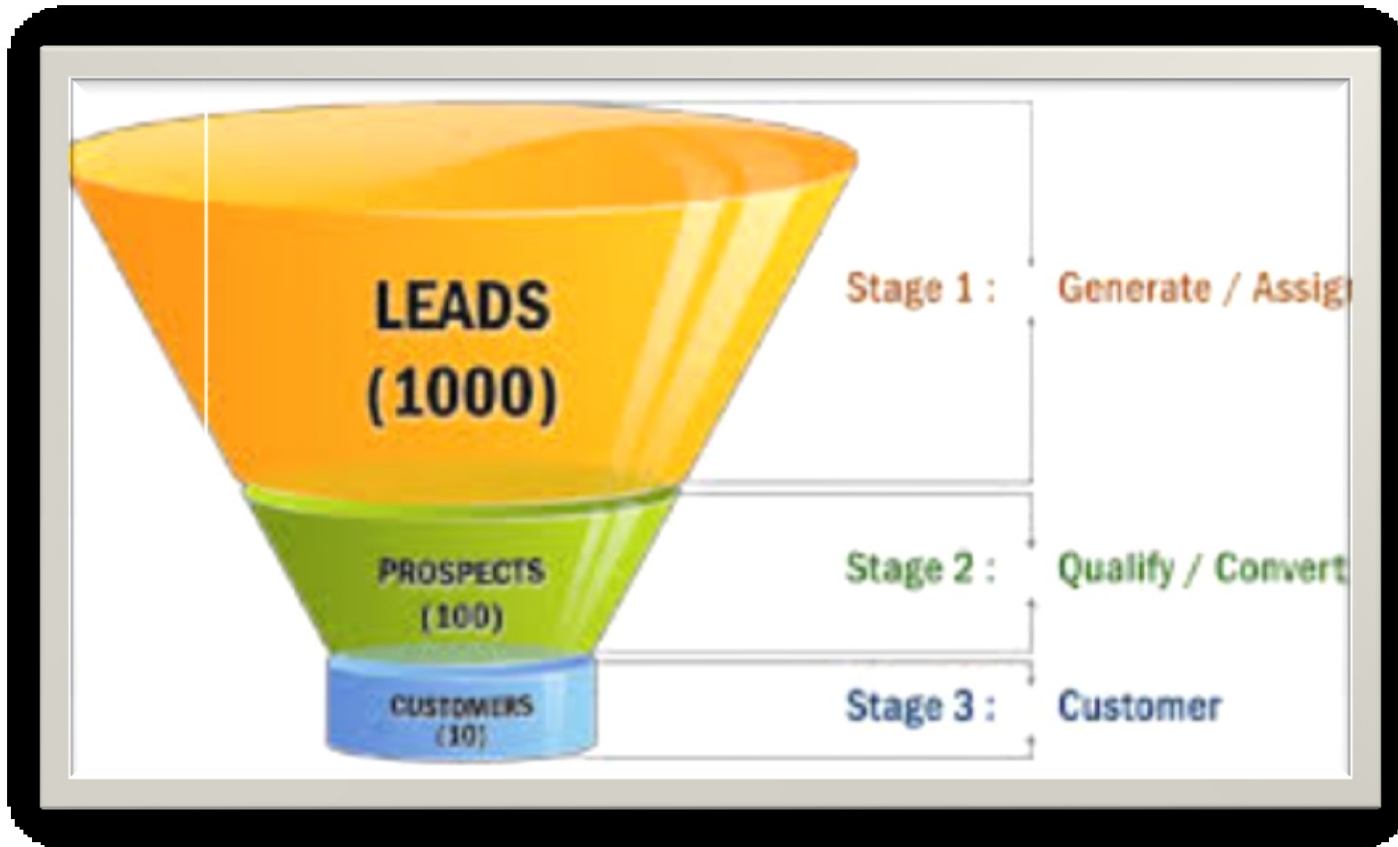
[Show Map](#)

### 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.
<a href="#">OP100001</a>	☐	11/6/2021	New tables	CT200116	BD	In Progress	Initial	
OP100002	☐	12/6/2021	New tables	CT200097	BD	Not Started		
OP100003	☐	12/6/2021	New tables	CT200094	BD	Not Started		
OP100004	☐	12/6/2021	New tables	CT200091	BD	Not Started		
OP100005	☐	12/6/2021	New tables	CT100002	BD	Not Started		
OP100006	☐	12/6/2021	New tables	CT200107	BD	Not Started		
OP100007	☐	12/6/2021	New tables	CT200112	BD	Not Started		
OP100008	☐	12/6/2021	New tables	CT200127	BD	Not Started		
OP100009	☐	12/6/2021	New tables	CT200002	BD	Not Started		
OP100010	☐	12/6/2021	New tables	CT200122	BD	Not Started		
OP100011	☐	12/6/2021	New tables	CT200001	BD	Not Started		
OP100012	☐	12/6/2021	New tables	CT200101	BD	Not Started		
OP100013	☐	12/6/2021	New tables	CT200105	BD	Not Started		
OP100014	☐	12/6/2021	New tables	CT200130	BD	Not Started		
OP100015	☑	1/5/2022	Assembling furniture	CT200136	PS	Won		
OP100016	☑	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
--------	-----	-----------	--------	------------	--------	---------------

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

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	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

**New opportunities**

# Sales Cycles

Sales Cycles | Work Date: 02.12.2027 ✓ Saved

Search + New Edit List Delete Statistics Stages More options

Code ↑	Description	Probability Calculation	Blocked	Comment
→ EX-LARGE	Existing customer - Large acc.	Multiply	<input type="checkbox"/>	No
EX-SMALL	Existing customer - Small acc.	Add	<input type="checkbox"/>	No
FIRSTLARGE	First time - Large account	Multiply	<input type="checkbox"/>	No
FIRSTSMALL	First time - Small account	Add	<input type="checkbox"/>	No

**Details** Attachments (0)

**Statistics**

No. of Opportunities 5

Estimated Value (LCY) 463 000,00

Calcd. Current Value (LCY) 20 946,00

EX-SMALL · Existing customer - Small acc. | Work Date: 02.12.2027 ✓ Saved

Sales Cycle Stages Search + New Edit List Delete Statistics More options

Stage ↑	Description	Completed %	Chances of Success %	Activity Code	Quote Required	Allow Skip	Date Formula
→ 1	Initial	2	20	INIT	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
2	Presentation	50	40	P-WORK	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
3	Proposal	80	60	PROPOSAL	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
4	Sign Contract	95	80	SIGN	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

# New Opportunity

Contacts | Work Date: 02.12.2027

Search + New Manage Home Contact Prices & Discounts

Create Opportunity Create Interaction Create Sales Quote

No.	Name ↑	Company Name ↑
<b>CT100006</b>	<b>A. Gibson's Law Firm</b>	A. Gibson's Law Firm
CT200057	Alan Brewer	A. Gibson's Law Firm
CT200116	David Oliver Lawrence	A. Gibson's Law Firm
CT200118	⋮ Lori Kane	<u>A. Gibson's Law Firm</u>
<b>CT100011</b>	<b>Add-ON Marketing</b>	Add-ON Marketing
CT100190	Chris McGurk	Add-ON Marketing

# New opportunity –Sales Cycle 1st stage

OP000007 · Business Centra quotation

[Home](#) Opportunity | Actions ▾ Fewer options

**Activate First Stage** Create Sales Quote Show Sales Quote Create Interaction Postponed Interactions

## General

Show less

No. ....	OP000007	Sales Document No. ....	
Description .....	Business Centra quotation	Campaign No. ....	...
Contact No. ....	CT100190 ...	Priority .....	Normal ▾
Contact Name .....	Chris McGurk	Sales Cycle Code .....	EX-SMALL ▾
Phone No. ....		Status .....	Not Started
Mobile Phone No. ....		Closed .....	<input type="checkbox"/>
Email .....		Creation Date .....	02.12.2027
Contact Company Name .....	Add-ON Marketing	Date Closed .....	
Salesperson Code .....	BC ▾	Segment No. ....	...
Sales Document Type .....			

## 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 %
--------	--------------	-------------------	-------------------	----------------	----------------------	-----------------------	----------------------------	-------------	----------------------	---------------

# Sales Cycles -1st Sales Cycle Stages an Update

Update Opportunity - CT100011 Add-ON Marketing CT100190 Chris McGurk



...

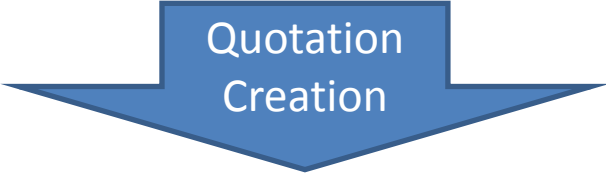
Action Type	Next
Sales Cycle Stage	2
Sales Cycle Stage Description	Presentation
Date of Change	02.12.2027
Estimated sales value (LCY)	100 000,00
Chances of Success (%)	40
Estimated Closing Date	02.12.2027
Cancel Existing Open Tasks	<input checked="" type="checkbox"/>

OK Cancel

# Sales Cycles -2st Sales Cycle Stages an Update

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	2	Presentation	02.12.2027	02.12.2027	100 000,00	45 000,00	50	40	45
<input type="checkbox"/>	:	1	Initial	02.12.2027	02.12.2027	0,00	0,00	2	20	11



## Sales Quotation line

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

[New Line](#) | [Delete Line](#) | [Select items...](#) | [Insert Ext. Texts](#) | [Dimensions](#)

Type	Item Reference No.	Description	Location Code	Quantity	Qty. to Assemble to Order	Unit of Measure Code	Unit Price Excl. VAT	Line Discount %
→ G/L Account	:	AOPR BC Testing Expert		1	0		100 000,00	





# Sales Cycles -1st Sales Cycle Stages an Update

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

...

Action Type	Next	▼
Sales Cycle Stage		3
Sales Cycle Stage Description	Proposal	
Date of Change	02.12.2027	📅
Estimated sales value (LCY)		64 882,40
Chances of Success (%)		60
Estimated Closing Date	02.12.2027	📅
Cancel Existing Open Tasks	<input checked="" type="checkbox"/>	

**OK** Cancel

# Sales Cycles -2st Sales Cycle Stages and next update

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	3	Proposal	02.12.2027	02.12.2027	64 882,40	45 417,68	80	60	70		
<input type="checkbox"/>	Next	2	Presentation	02.12.2027	02.12.2027	100 000,00	45 000,00	50	40	45		
<input type="checkbox"/>		1	Initial	02.12.2027	02.12.2027	0,00	0,00	2	20	11		

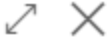
Calculations : Probabilities % =  $(80+70)/2=70$ ,  $(50+40)/2=45$   
 2nd stage : Calc current value 45000 =  $100\ 000 * 45\ % = 45000$   
 3rd stage : Calc current value =  $64882/0,7=45417$ ,  
 (where Estimated value is increased by 45% of the original calculated amount after rounding)



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	4	Sign Contract	02.12.2027	02.12.2027	64 882,40	56 772,10	95	80	88		
<input type="checkbox"/>	Next	3	Proposal	02.12.2027	02.12.2027	64 882,40	45 417,68	80	60	70		
<input type="checkbox"/>	Next	2	Presentation	02.12.2027	02.12.2027	100 000,00	45 000,00	50	40	45		
<input type="checkbox"/>		1	Initial	02.12.2027	02.12.2027	0,00	0,00	2	20	11		

# Opportuiny is closed as WON !!!

Close Opportunity - CT100011 Add-ON Marketing CT100190 Chris McGurk



...

## General

Opportunity Status ..... Won

Sales (LCY) ..... 64 882,40

Close Opportunity Code · BUSINESS\_W

Cancel Old Tasks .....

Closing Date ..... 02.12.2027

OK

Cancel

# Personal profile modifications

# Personal profile creation (from Contact card OR Search window)

Contact Card | Work Date: 7/20/2022

## CT100223 · Magnus Hedlund

Process Report Page | Actions **Related** Reports Fewer options

- Contact** (highlighted)
- Related Information
- Tasks
- Documents
- History

- Company >
- Person > Job Responsibilities
- Profiles** (highlighted)
- Comments
- Alternative Address >

Tell me what you want to do

**questio**

On current page (Contact Card)

- Profiles**  
Open the Profile Questionnaires window.

Go to Pages and Tasks

- > Questionnaire Setup** Administration
- > Configuration Questionnaire Lists

# 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
<b>Question</b>	<b>Sex</b>	<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
<b>Question</b>	<b>Hobbies</b>	<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
<b>Question</b>	<b>Marital Status</b>	<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
<b>Question</b>	<b>Educational level</b>	<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
<b>Question</b>	<b>Personality</b>	<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
→ <b>Question</b>	<b>Drinks</b>	<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
<b>Question</b>	<b>Sex</b>	<input type="checkbox"/>
Answer	Male	<input checked="" type="checkbox"/>
Answer	Female	<input type="checkbox"/>
<b>Question</b>	<b>Hobbies</b>	<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"/>
<b>Question</b>	<b>Personality</b>	<input type="checkbox"/>
Answer	Extrovert	<input checked="" type="checkbox"/>
Answer	Analytical	<input type="checkbox"/>
<b>Question</b>	<b>Drinks</b>	<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"/>		<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"/>					1
Answer	Beer	<input type="checkbox"/>	Normal	<input type="checkbox"/>					1
Answer	Wine	<input type="checkbox"/>	Normal	<input type="checkbox"/>					1

