

Introduction to MS Dynamics

NAV XVI. (CRM)

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CRM – Customer Relationship Management

- PROs
 - It enables to keep track of all prospective customer (suspects and prospects)
 - Improve sales and marketing service
 - Company can promote the work it has done for its customers in order 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.
- Sales force automation
 - Sales promotion analysis
 - Advertising
 - Personal selling
 - Direct marketing
 - Public relations
 - automate tracking of a client's account history
 - Use of technology (ERP)
- Opportunity Management

Market leaders

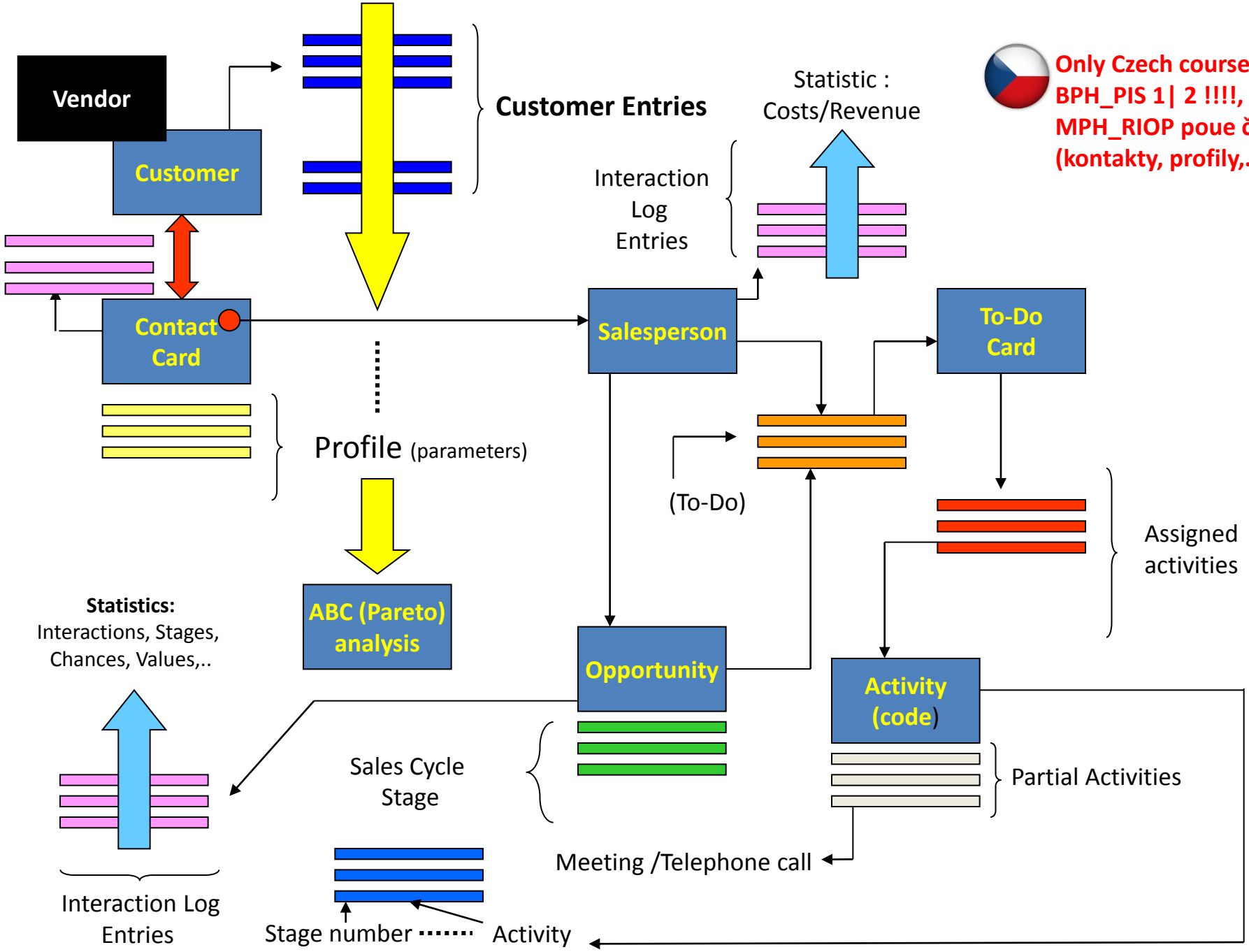
| Vendor | 2013 Revenue | 2013 Share (%) | 2012 Revenue | 2012 Share (%) |
|------------------------|---------------|----------------|---------------|----------------|
| Salesforce.com CRM | 3,292 | 16.1 | 2,525.6 | 14.0 |
| SAP AG | 2,622 | 12.8 | 2,327.1 | 12.9 |
| Oracle | 2,097 | 10.2 | 2,015.2 | 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


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

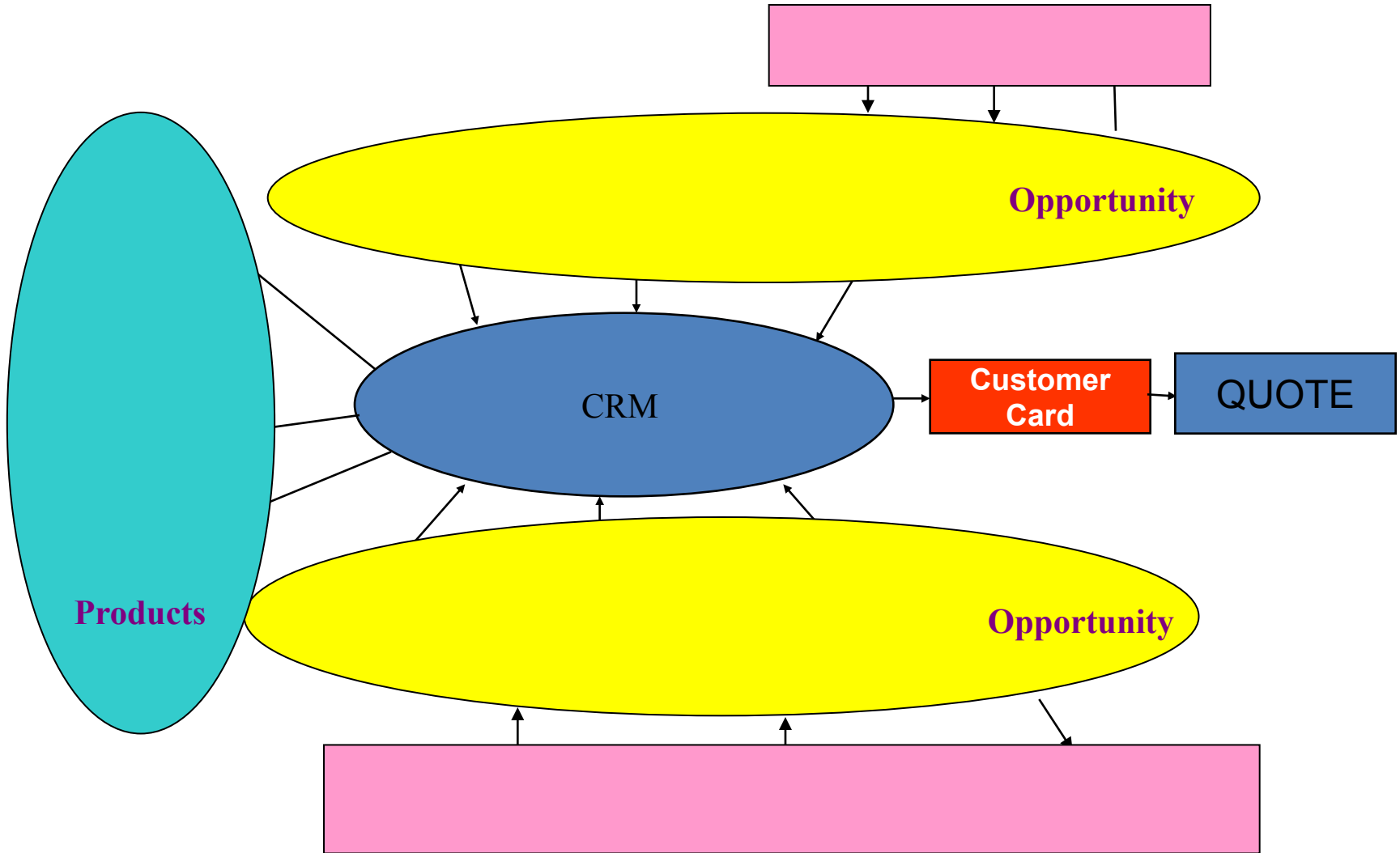


**Only Czech course
BPH_PIS 1 | 2 !!!!,
MPH_RIOP poue část
(kontakty, profily,..)**



ERP-CRM

 Only Czech course
BPH_PIS1 | 2 !!!!
a MPH_RIOP



Contact cards

- Contact card- company
- Contact card- person
- Contact Character– profiles, technologies,..
- Interactions
- Business Opportunities (estimated close date and value, probability,..)
- Sales Cycles
- Customer Card creation from Contact card
- Quotes

Karta kontaktu- společnost (hlavička karty) I

Správce vztahů

- Kontakty
- Prodejci
- Tahly
- Kampaně
- Segmenty
- Příležitosti
- Úkoly
- Sestavy

| Obecné | Spojení | Segmentace | Ekonomika | Zahr.obchod | Commerce Portal | Tech.profil | Pipeline | Rizika |
|----------------------------------|----------------|------------|-----------|-------------|-----------------|-------------|----------|--------|
| Číslo | 9631 | | | | | | | |
| Typ | | | | | | | | |
| Číslo společnosti | 9631 | | | | | | | |
| Název společnosti | DRIPOL, s.r.o. | | | | | | | |
| Název | DRIPOL, s.r.o. | | | | | | | |
| Název 2 | | | | | | | | |
| Adresa | Kulinářská 1 | | | | | | | |
| PSC/město | 602 00 | Brno | | | | | | |
| Kód země | CZ | | | | | | | |
| Vyhledávací název | DRIPOL, S.R.O. | | | | | | | |
| Primární kontakt | | | | | | | | |
| Komunikační styl | Neznámý | | | | | | | |
| Kód prodejce | JSK | | | | | | | |
| Decision Maker | | | | | | | | |
| Funkce | | | | | | | | |
| Typ nakupujícího | Neznámý | | | | | | | |
| Pro nás | | | | | | | | |
| Změněno dne | 21.09.06 | | | | | | | |
| Kód typu | | | | | | | | |
| Kód původu kontaktu | ALBERTINA | | | | | | | |
| Fáze obch.příležitosti | PROSPECT | | | | | | | |

Kontakty typu osoba



Contact Card

Sales & Marketing

- Sales
- Order Processing
- Marketing
 - Contacts**
 - Contact Search
 - Campaigns
 - Segments
 - Logged Segments
 - To-dos
- Reports
- Periodic Activities
- Setup
- Inventory & Pricing
- Analysis & Reporting
- History
- Setup

CT000001 The Cannon Group PLC - Contact Card

General | Communication | Segmentation | Foreign Trade

No. CT000001 Search Name THE CANNON GR...

Type Company Phone No.

Company No. CT000001 Salesperson Code PS

Company Name The Cannon Group PLC Salutation Code COMPANY

Name The Cannon Group PLC Last Date Modified 11.12.10

Address 192 Market Square Date of Last Interaction 26.01.12

Address 2. Last Date Attempted 26.01.12

Post Code/City B27 4KT Birmingham Next To-do Date 24.01.12

Country/Region Code GB

| Question | Answer | Ques... | Last Date ... |
|--------------------------------|-----------------------|---------|---------------|
| Discount (%) Last Year | Low discount usage | | 31.01.12 |
| Customer Purchase Frequency... | > 5 times a year | | 31.01.12 |
| Customer Purchase Frequency... | > 5 times a year | | 31.01.12 |
| Turnover (LCY), Last Year | low (below 1,000) | | 31.01.12 |
| Turnover (LCY), Current Year | High (over 4,000) | | 31.01.12 |
| Discount (%) Current Year | Medium discount usage | | 31.01.12 |
| Profit (LCY) Current Year | Top 25 % of Customers | | 31.01.12 |
| Company Ownership | Stock Exchange | | 31.01.12 |
| ▶ No. of employees | 1..99 | | 31.01.12 |

Contact Functions Create Interact Help

Contact Card- Person

CT100216 Bonnie Kearney - Contact Card

General Communication Segmentation Foreign Trade

No. CT100216 Search Name BONNIE KEARNEY

Type Person Phone No.

Company No. CT100245 Salesperson Code DC

Company Name TenTails Direct Ltd Salutation Code F

Name Bonnie Kearney Last Date Modified 20.10.14

Address Tower Road Date of Last Interaction

Address 2. Last Date Attempted

Post Code/City TA3 4FD Newquay Next To-do Date

Country/Region Code GB

| Question | Answer | Ques... | Last Date ... |
|-------------------|-----------|---------|---------------|
| Personality | Extrovert | | 20.10.14 |
| Educational level | Skilled | | 31.01.12 |
| Marital Status | Married | | 31.01.12 |
| Hobbies | Hunting | | 20.10.14 |
| Hobbies | Golf | | 31.01.12 |
| Hobbies | Football | | 31.01.12 |
| ▶ Sex | Female | | 31.01.12 |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |

Contact Functions Create Interact Help

Contact Card- Company-person new

CT000144 Fast software company - Contact Card

General Communication Segmentation Foreign Trade

No. CT000144 Search Name FAST SOFTWARE...

Type Company Phone No.

Company No. CT000144 Salesperson Code JR

Company Name Fast software company Salutation Code COMPANY

Name. Fast software company Last Date Modified 20.10.14

Address Steven Jibs Avenue 1 Date of Last Interaction

Address 2. Last Date Attempted

Post Code/City ZA-8000 Cape Town Next To-do Date

Country/Region Code ZA

| Question | Answer | Ques... | Last Date ... |
|-------------------------------|----------------|---------|---------------|
| Additional Business Relations | Partner | | 20.10.14 |
| Company Ownership | Stock Exchange | | 20.10.14 |
| ▶ No. of employees | 1..99 | | 20.10.14 |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |

Contact Functions Create Interact Help

CT000145 Garry Hilton - Contact Card

General Communication Segmentation Foreign Trade

No. CT000145 Search Name GARRY HILTON

Type Person Phone No.

Company No. CT000144 Salesperson Code JR

Company Name Fast software company Salutation Code UNISEX

Name. Garry Hilton Last Date Modified 20.10.14

Address Steven Jibs Avenue 1 Date of Last Interaction

Address 2. Last Date Attempted

Post Code/City ZA-8000 Cape Town Next To-do Date

Country/Region Code ZA

| Question | Answer | Ques... | Last Date ... |
|-------------------|--------------|---------|---------------|
| ▶ Personality | Analytical | | 20.10.14 |
| Educational level | Master/ Ph.d | | 20.10.14 |
| Marital Status | Married | | 20.10.14 |
| Hobbies | Golf | | 20.10.14 |
| Hobbies | Football | | 20.10.14 |
| Sex | Male | | 20.10.14 |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |

Contact Functions Create Interact Help

New interaction- use of wizard

CT000145 Garry Hilton - Contact Card

General Communication Segmentation Foreign Trade

No. CT000145 Search Name GARRY HILTON
Type Person Phone No.
Company No. CT000144 Salesperson Code JR
Company Name Fast software company Salutation Code UNISEX
Name Garry Hilton Last Date Modified 20.10.14
Address Steven Jibs Avenue 1 Date of Last Interaction
Address 2 Last Date Attempted
Post Code/City ZA-8000 Cape Town Next To-do Date
Country/Region Code ZA

| Question | Answer | Ques... | Last Date ... |
|-------------------|-------------|---------|---------------|
| Personality | Analytical | | 20.10.14 |
| Educational level | Master/Ph.d | | 20.10.14 |
| Marital Status | Married | | 20.10.14 |
| Hobbies | Golf | | 20.10.14 |
| Hobbies | Football | | 20.10.14 |
| Sex | Male | | 20.10.14 |

Contact Functions **Create Interact** Help



CT000144 Fast software company CT000145 Garry Hilton - Create Inte...

This wizard helps you to create interactions and record information regarding their cost, duration and connection to a campaign.

Who are you interacting with?
Garry Hilton

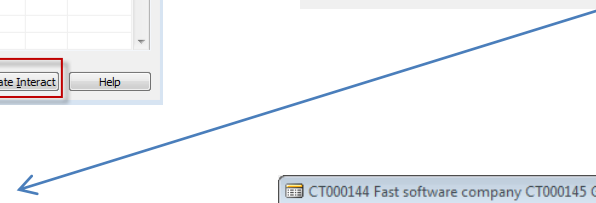
What is the type of interaction?
MEETINV

Language Code

Who is the salesperson responsible?
JR

Describe your interaction.
Quotation during meetin

< Back **Next >** Finish Cancel



CT000144 Fast software company CT000145 Garry Hilton - Create Inte...

The following fields are optional. If you want to log your interaction now, click Finish.

Correspondence Type

When did the interaction take place?
09.09.12 11:00:00

What is the direction of the information flow?
Outbound

Initiated By
Us

Enter the evaluation of the interaction here:
Very Positive

The interaction attempt was successful.

< Back **Next >** Finish Cancel



CT000144 Fast software company CT000145 Garry Hilton - Create Inte...

The following fields are optional. If you want to log your interaction now, click Finish.

What is the cost of the interaction (LCY)?
1 000,00

How long did the interaction last (Min.)?
360

< Back **Next >** Finish Cancel

New interaction

CT000144 Fast software company CT000145 Garry Hilton - Interaction Log Entries *Interaction entry*

| C... A... | Date | Interactio... | Description | Attachment | Contact No. E... | Cost (LCY) | Duration (Min.) | Salespers... | Campa |
|-----------|----------|---------------|--------------------------|------------|------------------|------------|-----------------|--------------|-------|
| | 09.09.12 | MEETINV | Quotation during meetein | | CT000145 V.. | 1 000,00 | 360 | JR | |



Create new opportunity

Address Steven Jibs Avenue 1 Date of Las
Address 2. Last Date A
Post Code/City ZA-8000 Cape Town Next To-do
Country/Region Code ZA

| Question | Answer |
|---------------------------------|----------------|
| ▶ Additional Business Relations | Partner |
| Company Ownership | Stock Exchange |
| No. of employees | 1..99 |

- Remaining groups
- Profiles
- Statistics F9
- Picture
- Comments
- Alternative Address ▶
- Interaction Log Entries Ctrl+F5
- Postponed Interactions
- To-dos
- Opportunities ▶**
- Segments
- Sales Quotes
- Customer/Vendor/Bank Acc.
- Online Map

Contact Functions Create Interact Help

New opportunity

CT000144 Fast software company - Create Opportunity

This wizard helps you to create opportunities.

Describe the opportunity.
Selling MS Dynamics NAV

What is the date of the opportunity?
09.09.12

What is the priority of the opportunity?
Normal

< Back Next > Finish Cancel



CT000144 Fast software company - Create Opportunity

You must now record the Contact, Salesperson and Sales Cycle of this Opportunity.

Which contact is involved?
Fast software company

Which salesperson is involved with this opportunity?
JR

What is the sales cycle code?
EX-LARGE

Sales Cycles

| Code | Description | Probability Calcula... | B... | C... |
|------------|--------------------------------|------------------------|------|------|
| EX-LARGE | Existing customer - Large acc. | Multiply | | |
| EX-SMALL | Existing customer - Small acc. | Add | | |
| FIRSTLA... | First time - Large account | Multiply | | |
| FIRSTSM... | First time - Small account | Add | | |

Contact Name

OK Cancel Sales Cycle Help

New opportunity

CT000144 Fast software company - Create Opportunity

You can now specify the estimated values regarding the opportunity if you activate the first sales cycle stage.

Activate the First Stage.

What is the estimated sales value (LCY)?
1 000 000,00

What are the chances of success (%)?
20

What is the estimated closing date?
12.12.12

opportunity

< Back Next > Finish Cancel

New opportunity

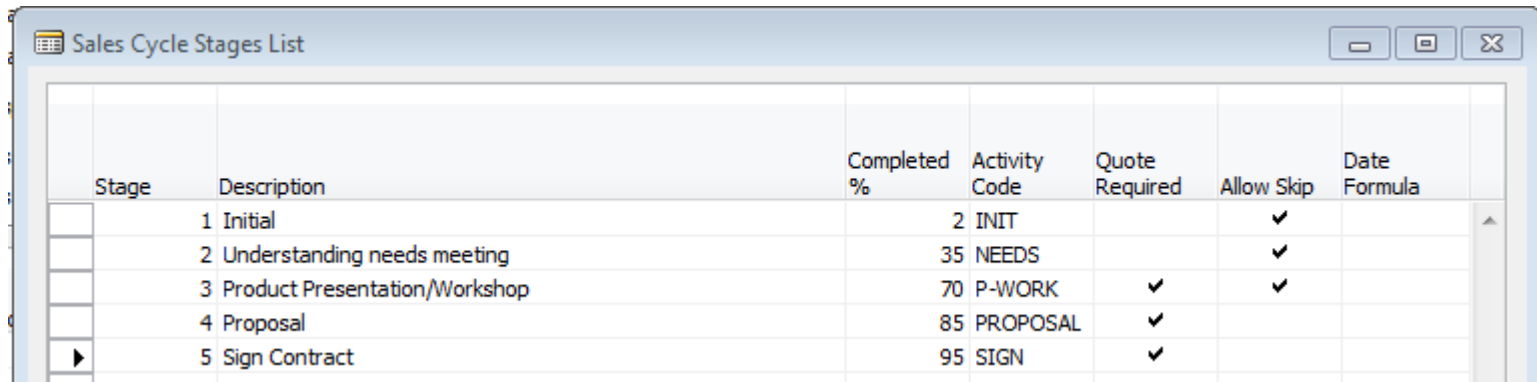
The screenshot shows the 'OP000001 Selling MS Dynamics NAV - Opportunity Card' window. The 'General' tab is active, displaying various fields for the opportunity. A table below the form shows the sales cycle stages. A red box highlights the 'Sales Cycle Stage' field in the table, which contains the value '1'. A red arrow points from this field to a 'Sales Cycle Stages List' dialog box. The dialog box shows a list of stages with their descriptions and completion percentages.

| Active | Action Taken | Sales Cycle Stage | Date of Change | Estimated Close Date | Estimated Value (LCY) | Calcd. Current Value (LCY) | Completed % | Chances of Success % | Probability % |
|--------|--------------|-------------------|----------------|----------------------|-----------------------|----------------------------|-------------|----------------------|---------------|
| ▶ | ✓ | 1 | 09.09.12 | 12.12.12 | 1 000 000,00 | 4 000,00 | 2 | 20 | 0 |

| Stage | Description | Complete... | Activity C... | Quote Re... | Allow Skip | Date For... | C... |
|-------|---------------------------------|-------------|---------------|-------------|------------|-------------|------|
| ▶ | 1 Initial | | 2 INIT | | ✓ | | |
| | 2 Understanding needs meeting | | 35 NEEDS | | ✓ | | |
| | 3 Product Presentation/Workshop | | 70 P-WORK | ✓ | ✓ | | |
| | 4 Proposal | | 85 PROPOSAL | ✓ | | | |
| | 5 Sign Contract | | 95 SIGN | ✓ | | | |

From here you can create various To-Dos and and change Sales Cycle stages

Sales Cycle Stages



The screenshot shows a window titled "Sales Cycle Stages List" with a table containing the following data:

| Stage | Description | Completed % | Activity Code | Quote Required | Allow Skip | Date Formula |
|-------|---------------------------------|-------------|---------------|----------------|------------|--------------|
| | 1 Initial | | 2 INIT | | ✓ | |
| | 2 Understanding needs meeting | | 35 NEEDS | | ✓ | |
| | 3 Product Presentation/Workshop | | 70 P-WORK | ✓ | ✓ | |
| | 4 Proposal | | 85 PROPOSAL | ✓ | | |
| ▶ | 5 Sign Contract | | 95 SIGN | ✓ | | |

Contact card->To_Do_->Activities



Only Czech course
BPH_PIS1|2 !!!!
Adn MPH-RIOP as well

CT000144 Fast software company - Contact Card

General Communication Segmentation Foreign Trade

No. CT000144 Search Name FAST SOFTWARE...
Type Company Phone No.
Company No. CT000144 Salesperson Code JR
Company Name Fast software company Salutation Code COMPANY
Name Fast software company Last Date Modified 20.10.14
Address Steven Jibs Avenue 1 Date of Last Interaction 09.09.12
Address 2. Last Date Attempted 09.09.12
Post Code/City ZA-8000 Cape Town Next To-do Date 09.09.12
Country/Region Code ZA

| Question | Answer |
|-------------------------------|----------------|
| Additional Business Relations | Partner |
| Pareto | C |
| Company Ownership | Stock Exchange |
| No. of employees | 1..99 |

To-Dos

Contact Functions Create Interact Help



CT000144 Fast software company - To-do List

| Closed | Starting Date | Type | Description | Priority | Status | Organizer To-do No. | Date Closed | Canceled | Comment | Contact No. | Salesperson Code |
|--------|---------------|------|-------------------------------|----------|-------------|---------------------|-------------|----------|---------|-------------|------------------|
| | 09.09.12 | | Verify quality of opportunity | High | Not Started | TD000051 | | | | CT000144 | JR |
| | 16.09.12 | | Identify key persons | Normal | Not Started | TD000053 | | | | CT000144 | JR |

Contact Name: Fast software company Contact Company Name: Fast software company

Assign activities

To-do Functions Create To-do Help

Contact card->To-Dos->Activities

CT000144 Fast software company - Assign Activity

This wizard helps you to assign activities. The Meeting Organizer field should be filled in if this activity is assigned to a team and contains a To-do of type Meeting.

What is the activity code?
P-PRES

What is the activity start date?
21.10.14

Which contact is involved in this activity?
Fast software company

Who is the salesperson responsible?

Which team is involved in this activity?
SALE

Who is the meeting organizer?

< Back Next > Finish Cancel

Activity List

| Code | Description |
|----------|-----------------------------|
| C-PRES | Company Presentation to-dos |
| INIT | Initial to-dos |
| NEEDS | Understanding needs to-dos |
| PROPOSAL | Proposal to-dos |
| P-PRES | Product Presentation |
| P-WORK | Presentation/Workshop |
| QUAL | Qualification to-dos |
| SIGN | Sign Contract to-dos |
| WORKS... | Workshop to-dos |

OK Cancel Activity Help



Only Czech course
BPH_PIS1|2 !!!!
Adn MPH-RIOP as well

CT000144 Fast software company - Assign Activity

This wizard helps you to assign activities. The Meeting Organizer field should be filled in if this activity is assigned to a team and contains a To-do of type Meeting.

What is the activity code?
P-PRES

What is the activity start date?
21.10.14

Which contact is involved in this activity?
Fast software company

Who is the salesperson responsible?

Which team is involved in this activity?
SALE

Who is the meeting organizer?

< Back Next > Finish Cancel

P-PRES Product Presentation - Activity

Code P-PRES
Description Product Presentation

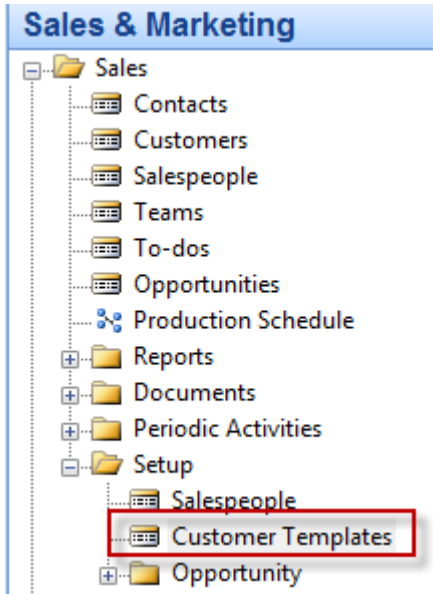
| Type | Description | Priority | Date Formula |
|------------|--|----------|--------------|
| Phone Call | Make appointment for product pres... | Normal | |
| | Confirm product presentation in wri... | High | +2D |
| | Book necessary equipment | Normal | +2D |



How to create a new customer from contact card



Only Czech course
BPH_PIS1| 2
and MPH_RIOP!!!!



ZAR LARGE - Customer Template Card

General

| | | | |
|--------------------------|------------------|---------------------------|-------------------------------------|
| Code | ZAR LARGE | Gen. Bus. Posting Group . | NATIONAL |
| Description | Large SA company | VAT Bus. Posting Group . | NATIONAL |
| Country/Region Code . . | ZA | Customer Posting Group . | DOMESTIC |
| Territory Code | CAPE | Customer Price Group . . | TOP1 |
| Currency Code | ZAR | Customer Disc. Group . . | LARGE ACC |
| | | Allow Line Disc. | <input checked="" type="checkbox"/> |
| | | Invoice Disc. Code . . . | ZAR LARGE |
| | | Payment Terms Code . . | 14 DAYS |
| | | Payment Method Code . | BANK |
| | | Shipment Method Code . | DELIVERY |

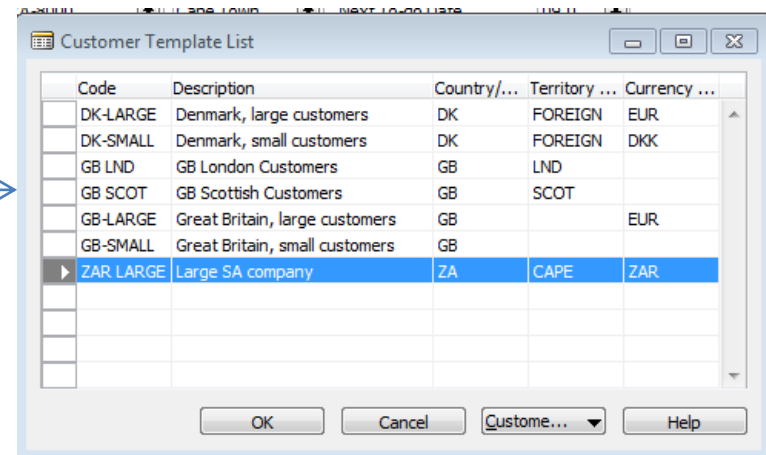
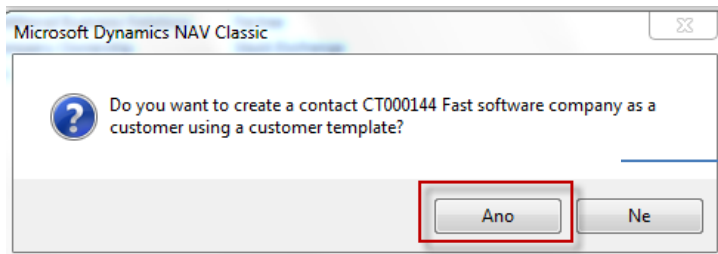
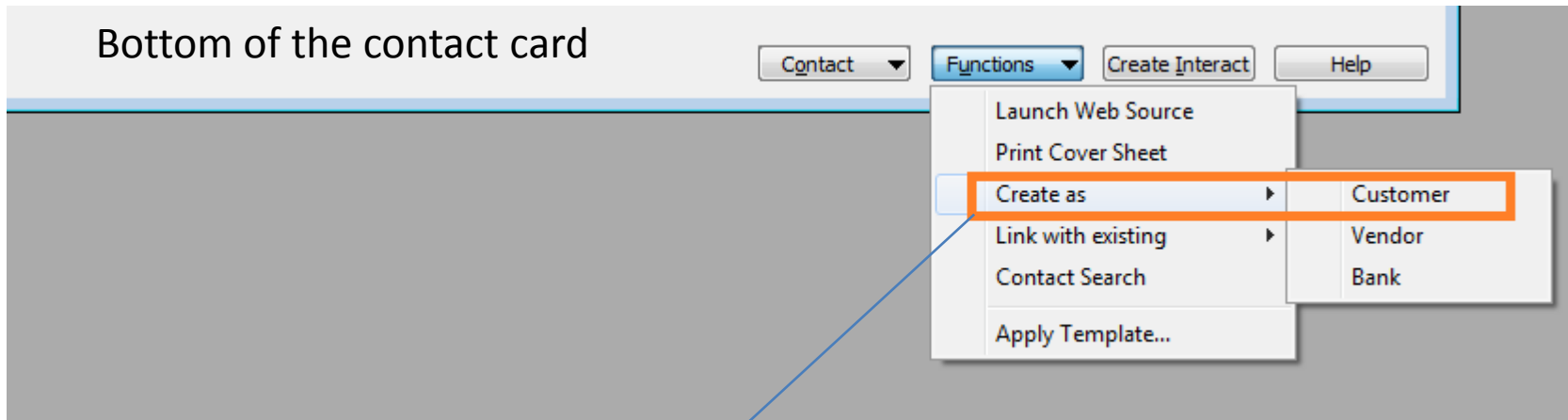
Custom... Sales Help

Enter data either by writing
or by use Look-up (FG)

How to create a new customer from contact card



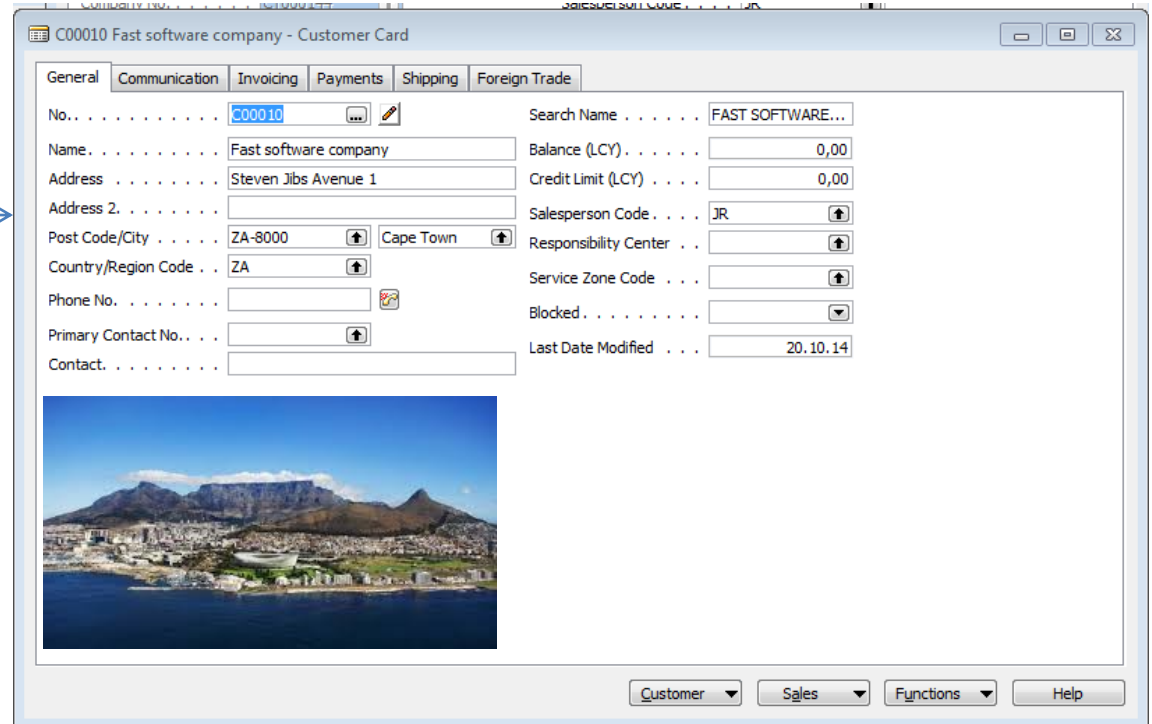
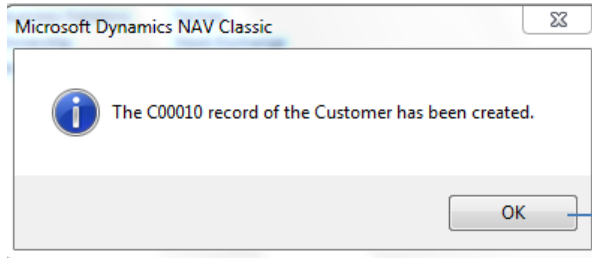
Only Czech course
BPH_PIS1 | 2
and MPH_RIOP!!!!



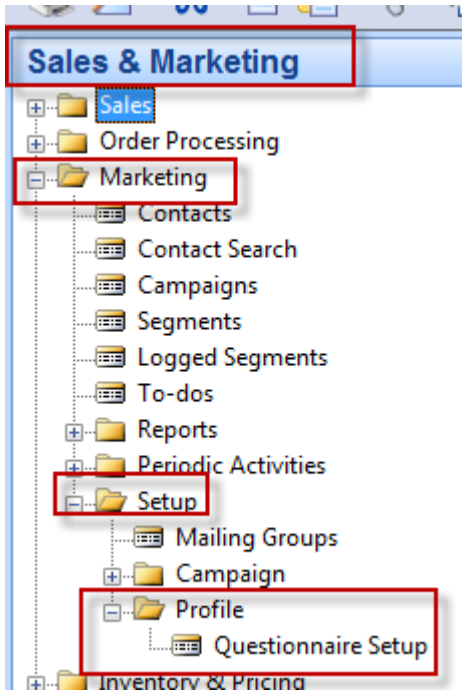
How to create a new customer from contact card



Only Czech course
BPH_PIS1 | 2
and MPH_RIOP!!!!



Personal profile creation



The 'Profile Questionnaire Setup' dialog box is shown. It has a title bar with standard window controls. Below the title bar, there is a text field containing 'COM...' with a dropdown arrow. Below this is a table with columns: 'T... Description', 'Multiple A...', 'Priority', 'Auto Con...', 'From Value', 'To Value', and 'No. of Co...'. The table contains two sections: 'No. of employees' and 'Company Ownership'. Below the table are 'Line' and 'Functions' dropdown menus, and a 'Help' button.

| T... Description | Multiple A... | Priority | Auto Con... | From Value | To Value | No. of Co... |
|------------------------------|---------------|----------|-------------|------------|----------|--------------|
| Q.. No. of employees | | | | | | |
| A.. 1..99 | | Normal | | | | 39 |
| A.. 100..499 | | Normal | | | | 57 |
| A.. 500..999 | | Normal | | | | 15 |
| A.. 1000+ | | Normal | | | | 7 |
| Q.. Company Ownership | | | | | | |
| A.. Stock Exchange | | Normal | | | | 71 |
| A.. Family | | Normal | | | | 28 |
| A.. Foundation | | Normal | | | | 18 |
| A.. Government | | Normal | | | | 1 |
| A.. Institution | | Normal | | | | 2 |

Below the dialog box is another window titled 'Profile Questionnaires'. It has a table with columns: 'Code', 'Description', 'Priority', 'Contact Type', and 'Business ...'. The 'PERSON' row is highlighted with a red box.

| Code | Description | Priority | Contact Type | Business ... |
|-----------|-------------------------------|----------|--------------|--------------|
| 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 |

At the bottom of the 'Profile Questionnaires' window are buttons for 'OK', 'Cancel', 'Edit Questio...', and 'Help'. On the right side of the screen, there is a small cartoon character with a question mark and the text 'Who Am I?'.

Personal profile creation

Profile Questionnaire Setup

Profile Questionnaire C... PERSON

| T... Description | Multiple A... | Priority | Auto Con... | From Value | To Value | No. of Co... |
|------------------------------|---------------|----------|-------------|------------|----------|--------------|
| Q.. Sex | | | | | | |
| A.. Male | | Low | | | | 152 |
| A.. Female | | Low | | | | 96 |
| Q.. Hobbies | ✓ | | | | | |
| A.. Football | | Low | | | | 51 |
| A.. Golf | | Low | | | | 87 |
| A.. Tennis | | Low | | | | 81 |
| A.. Hunting | | Low | | | | 67 |
| A.. Other outdoor | | Low | | | | 67 |
| A.. Theater | | Low | | | | 48 |
| A.. Literature | | Low | | | | 29 |
| A.. Design | | Low | | | | 32 |
| Q.. Marital Status | ✓ | | | | | |
| A.. Married | | Low | | | | 116 |
| A.. Children | | Low | | | | 102 |
| Q.. Educational level | | | | | | |
| A.. Master/ Ph.d | | Normal | | | | 10 |
| A.. Bachelor | | Normal | | | | 58 |
| A.. Skilled | | Normal | | | | 123 |
| Q.. Personality | ✓ | | | | | |
| A.. Extrovert | | Normal | | | | 74 |
| A.. Analytical | | Normal | | | | 41 |

Line Functions Help

Profile Contacts

| Contact No. | Contact Company Name | Contact Name |
|-------------|--------------------------|------------------|
| CT000145 | Fast software company | Garry Hilton |
| CT100125 | Cane Showroom | Andrew Lan |
| CT100131 | Rent a Truck | Kevin F. Browne |
| CT100132 | Spotsmeyer's Furnishings | Andrew Cencini |
| CT100135 | Viksjo Snickerifabrik AB | Andreas Berglund |
| CT100141 | Boybridge Tool Mart | John Tippett |

Add a new question

| Ques... | Drinks | | |
|---------|-----------|---|--------|
| Answer | Whisky | ✓ | Normal |
| Answer | Wine | | Normal |
| Answer | Beer | | Normal |
| Answer | Water | | Normal |
| Answer | Coca-Cola | | Normal |

Personal profile creation

The screenshot shows a CRM contact card for Amy E. Alberts (CT100197) with a profile questionnaire dialog box open. The contact card includes fields for No., Type, Company No., Company Name, Name, Address, Post Code/City, Country/Region Code, Search Name, Phone No., Salesperson Code, Salutation Code, Last Date Modified, Date of Last Interaction, Last Date Attempted, and Next To-do Date. The profile questionnaire dialog box is titled 'Profile Questionnaire C...' and is set to 'PERSON'. It contains a table with columns 'T... Description' and 'Set'. The 'Set' column has checkboxes for 'Bachelor', 'Skilled', 'Whisky', 'Wine', 'Beer', and 'Water', all of which are checked. The 'Personality' and 'Drinks' sections are highlighted in yellow. A red arrow points to the 'Set' column, and a red box highlights the 'More' icon (three dots) in the dialog box's title bar.

CT100197 Amy E. Alberts - Contact Card

General Communication Segmentation Foreign Trade

No. CT100197 Search Name AMY E. ALBERTS

Type Person Phone No.

Company No. CT100017 Salesperson Code AH

Company Name Furnitures At Work Salutation Code F

Name Amy E. Alberts Last Date Modified

Address 854 Theater Road Date of Last Interaction

Address 2. Last Date Attempted

Post Code/City WD1 6YG Watford Next To-do Date

Country/Region Code GB

| Question | Answer |
|-------------------|------------|
| Educational level | Skilled |
| Hobbies | Literature |
| Sex | Female |

Profile Questionnaire C... PERSON

| T... Description | Set |
|------------------------|-----|
| A.. Bachelor | |
| A.. Skilled | ✓ |
| Q.. Personality | |
| A.. Extrovert | |
| A.. Analytical | |
| Q.. Drinks | |
| A.. Whisky | ✓ |
| A.. Wine | ✓ |
| A.. Beer | ✓ |
| A.. Water | ✓ |

Help

Personal profile creation

CT100197 Amy E. Alberts - Contact Card

General Communication Segmentation Foreign Trade

No. CT100197 Search Name AMY E. ALBERTS

Type Person Phone No.

Company No. CT100017 Salesperson Code AH

Company Name Furnitures At Work Salutation Code F

Name. Amy E. Alberts Last Date Modified

Address 854 Theater Road Date of Last Interaction

Address 2. Last Date Attempted

Post Code/City WD1 6YG Watford Next To-do Date

Country/Region Code GB

| Question | Answer |
|-------------------|------------|
| Drinks | Water |
| Drinks | Beer |
| Drinks | Wine |
| Drinks | Whisky |
| Educational level | Skilled |
| Hobbies | Literature |
| Sex | Female |

Pareto analysis based on company profile



Only Czech course
BPH_PIS 1|2 a
MPH_RIOP!!!!

Profile Questionnaires

| Code | Description | Priority | Contact Type | Business ... |
|----------|------------------------------|----------|--------------|--------------|
| COMPANY | General company information | Normal | Companies | |
| CUSTOMER | Customer information | Normal | Companies | CUST |
| LEADO | Lead Qualification | Normal | Companies | PROS |
| PARETO | Pareto analysis | Normal | Companies | CUST |
| PERSON | General personal information | Normal | People | |

Add new line

Profile Questionnaire Setup

Profile Questionnaire C... PARETO

| Type | Description | Multiple A... | Priority | Auto Con... | From Value | To Value | No. of Co. |
|---------|-------------|---------------|----------|-------------|------------|----------|------------|
| Ques... | Pareto | | | | | | |

Line Functions Help

Question Details Shift+F5

Answer Where-Used

Add Question details

Pareto - Profile Question Details

General Classification

Description Pareto

Multiple Answers

Pareto - Profile Question Details

General Classification

Auto Contact Classific...

Customer Class. Field . Sales (LCY)

Vendor Class. Field .

Contact Class. Field . Answer Points

Min. % Questions ...

Starting Date Formula . -5Y

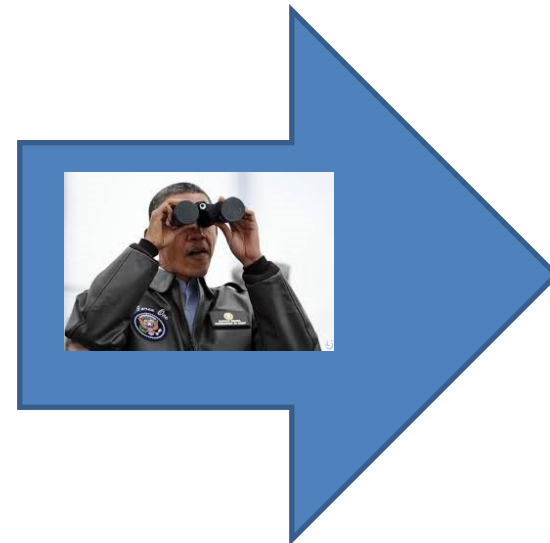
Ending Date Formula . CM

Classification Method . Defined Value

Sorting Method . . .

No. of Decimals 0

Help



Pareto analysis based on company profile



Only Czech course
BPH_PIS1 | 2
and MPH_RIOP!!!!

Profile Questionnaire Setup

Profile Questionnaire C... PARETO

| Type | Description | Multiple Answers | Priority | Auto Contact ... | From Value | To Value | No. of Contacts |
|---------|---------------|------------------|----------|------------------|------------|-----------|-----------------|
| Ques... | Pareto | ✓ | | ✓ | | | |
| Answer | A | | Normal | | 10 001 | 4 000 000 | 3 |
| Answer | B | | Normal | | 5 001 | 10 000 | 1 |
| Answer | C | | Normal | | | 5 000 | 65 |

Line Functions Help

CT000002 Selangorian Ltd. - Contact Card

General Communication Segmentation Foreign Trade

Company No. CT000002

Company Name Selangorian Ltd.

Address 153 Thomas Drive

Country/Region Code GB

| Question | Answer |
|--------------------------------|--------------------|
| Discount (%) Current Year | Low discount usage |
| Discount (%) Last Year | Low discount usage |
| Pareto | B |
| Customer Purchase Frequency... | 3-5 times a year |

- Create Rating
- Update Classification**
- Move Up
- Move Down
- Print
- Test Report

End of the section XVI.

