

Introduction to MS Dynamics

(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)

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

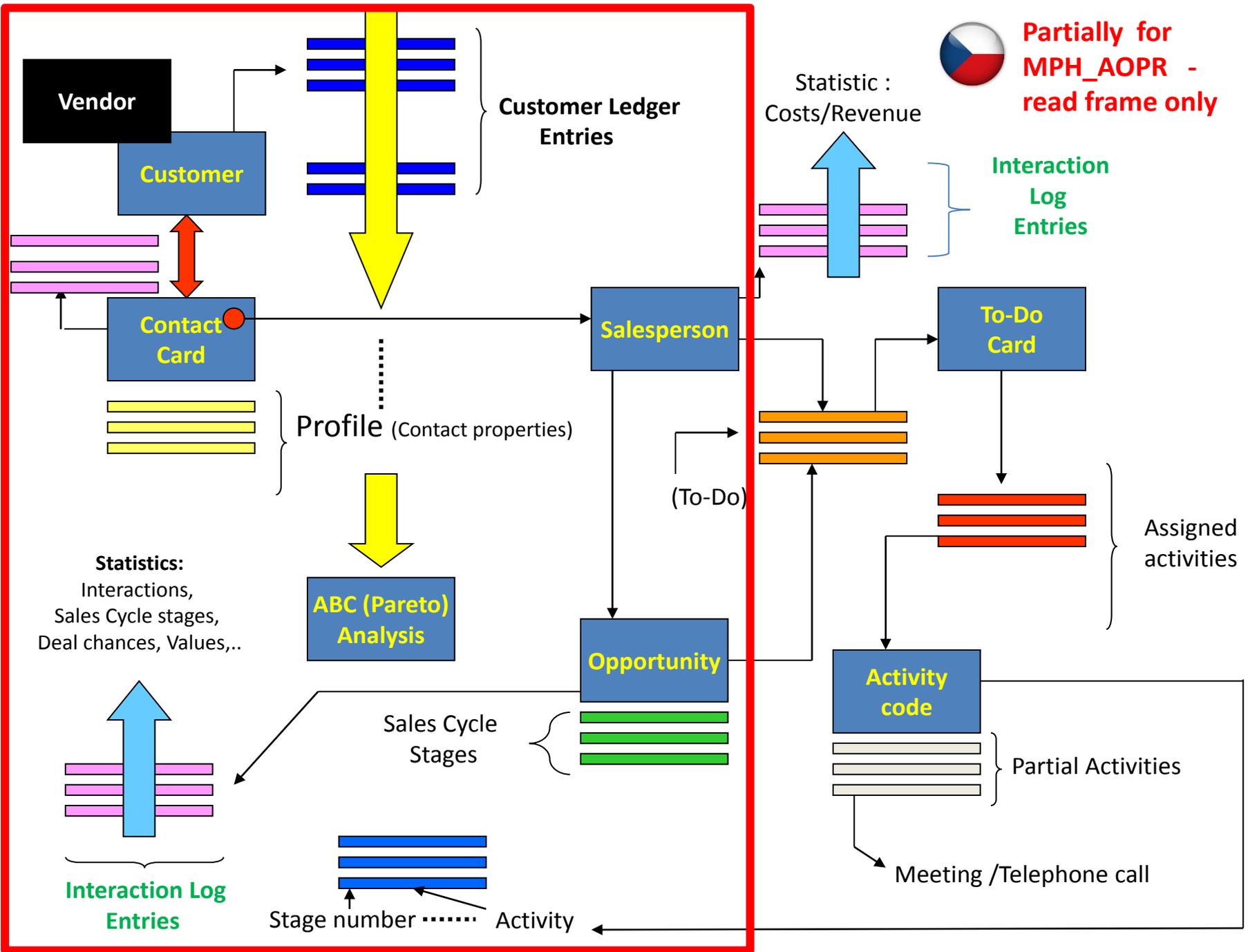
figures in millions of US dollars

Source:

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



Partially for MPH_AOPR - read frame only



Contact cards

- Contact card- company->Customer (Vendors)
- Contact card- person -> Customer (Vendors)
- Contact Character– profiles, technologies,..
- Interactions (driven by wizard)
- Business Opportunities (estimated close date and value, probability,..)
- Sales Cycles
- Customer Card creation from Contact card
- Quotes
- Interaction log entries



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



CT100011 · Add-ON Marketing Company Contact Card

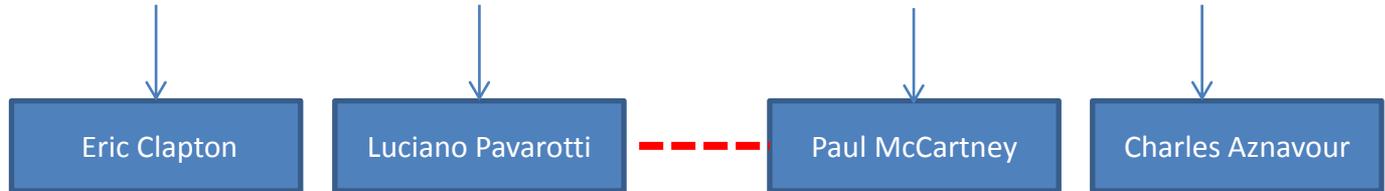
General

No.:	CT100011	Country/Region Code:	US
Type:	Company	Search Name:	ADD-ON MARKETING
Company No.:	CT100011	Phone No.:	
Company Name:	Add-ON Marketing	Salesperson Code:	DC
Name:	Add-ON Marketing	Salutation Code:	COMPANY
Address:	435 Kingston Street	Last Date Modified:	
Address 2:		Date of Last Interaction:	
Post Code:	US-NY 11010	Last Date Attempted:	
City:	New York	Next To-do Date:	

Lines

Find Filter Clear Filter

Question	Answer	Questions Answered (%)	Last Date Updated
Company Ownership	Family		31.1.2019
No. of employees	1..99		31.1.2019



Contact persons type card

Customer card->Contact card

Edit - Customer Card - 10000 - The Cannon Group PLC

HOME ACTIONS NAVIGATE REPORT

View Edit New Delete Sales Quote Sales Invoice Sales Order Sales Credit Memo Reminder Send Approval Request Cancel Approval Request Approvals See my Flows Bank Accounts Ship-to Addresses Contact Direct Debit Mandates OneNote Notes Links Refresh Clear Filter Go to Previous Next

10000 - The Cannon Group PLC

General

No.:	10000	Responsibility Center:	BIRMINGHAM
Name:	The Cannon Group PLC	Service Zone Code:	M
IC Partner Code:		Document Sending Profile:	
Balance (LCY):	186 077,40	Total Sales:	20 781,80
Balance Due (LCY):	157 445,66	Costs (LCY):	16 159,10
Credit Limit (LCY):	0,00	Profit (LCY):	7 904,20
Blocked:		Profit %:	32,8
Privacy Blocked:	<input type="checkbox"/>	Last Date Modified:	13.09.2019
Salesperson Code:	PS	Disable Search by Name:	<input type="checkbox"/>

Contact Card



Contact card

Contact List Type to filter (F3) | No. ▼ →

No filters applied

No.	Name	Phone No.	Email	Salespers... Code	Territory Code
CT000007	The Cannon Group PLC		the.cannon.group.plc@contoso.c...	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



Contact Card-company

CT000004 · Candoxy Canada Inc.

General

No.:	<input type="text" value="CT000004"/>	Country/Region Code:	<input type="text" value="CA"/>
Type:	<input type="text" value="Company"/>	Search Name:	<input type="text" value="CANDOXY CANADA INC."/>
Company No.:	<input type="text" value="CT000004"/>	Phone No.:	<input type="text"/>
Company Name:	<input type="text" value="Candoxy Canada Inc."/>	Salesperson Code:	<input type="text" value="JR"/>
Name:	<input type="text" value="Candoxy Canada Inc."/>	Salutation Code:	<input type="text" value="COMPANY"/>
Address:	<input type="text" value="18 Cumberland Street"/>	Last Date Modified:	<input type="text" value="24.8.2017"/>
Address 2:	<input type="text"/>	Date of Last Interaction:	<input type="text"/>
Post Code:	<input type="text" value="CA-ON P7B 5E2"/>	Last Date Attempted:	<input type="text"/>
City:	<input type="text" value="Thunder Bay"/>	Next To-do Date:	<input type="text"/>

Lines

Find Filter Clear Filter

Question	Answer	Questions Answered (%)	Last Date Updated
Discount (%) Current Year	Low discount usage		31.1.2019
Discount (%) Last Year	Low discount usage		31.1.2019
Customer Purchase Frequency, L...	< 3 times a year		31.1.2019
Customer Purchase Frequency, ...	< 3 times a year		31.1.2019
Turnover (LCY), Last Year	low (below 1,000)		31.1.2019
Turnover (LCY), Current Year	low (below 1,000)		31.1.2019
Profit (LCY) Current Year	Bottom 25 % Customers		31.1.2019

Profile

Contact Card- Person

CT200084 · Christian Kemp

General

No.:	<input type="text" value="CT200084"/>	Country/Region Code:	<input type="text" value="US"/>
Type:	<input type="text" value="Person"/>	Search Name:	<input type="text" value="CHRISTIAN KEMP"/>
Company No.:	<input type="text" value="CT100012"/>	Phone No.:	<input type="text"/>
Company Name:	<input type="text" value="eAmericonda"/>	Salesperson Code:	<input type="text" value="DC"/>
Name:	<input type="text" value="Christian Kemp"/>	Salutation Code:	<input type="text" value="M"/>
Address:	<input type="text" value="1558 23rd Street"/>	Last Date Modified:	<input type="text"/>
Address 2:	<input type="text"/>	Date of Last Interaction:	<input type="text"/>
Post Code:	<input type="text" value="US-NY 11010"/>	Last Date Attempted:	<input type="text"/>
City:	<input type="text" value="New York"/>	Next To-do Date:	<input type="text"/>

Lines

Find Filter Clear Filter

Question	Answer	Questions Answered (%)	Last Date Updated
Educational level	Bachelor		31.1.2019
Marital Status	Married		31.1.2019
Hobbies	Theater		31.1.2019
Hobbies	Golf		31.1.2019
Sex	Male		31.1.2019

Profile

Contact Card- Company-new person - (created from

Company card)

CT000042 · J & V v.o.s.

General

No.: CT000042
Type: Company
Company No.: CT000042
Company Name: J & V v.o.s.
Name: J & V v.o.s.
Address: Fillova 128
Address 2:
Post Code: CZ-696 42
City: Vracov

Country/Region Code:
Search Name:
Phone No.:
Salesperson Code:
Salutation Code:
Last Date Modified:
Date of Last Interaction:
Last Date Attempted:
Next To-do Date:

Lines

Question	Answer	Questions Answered (%)	Last Date Updated
Discount (%) Current Year	Low discount usage		31.1.2019
Discount (%) Last Year	Low discount usage		31.1.2019
Customer Purchase Frequency, L...	< 3 times a year		31.1.2019
Customer Purchase Frequency, ...	< 3 times a year		31.1.2019
Turnover (LCY), Last Year	low (below 1,000)		31.1.2019
Turnover (LCY), Current Year	low (below 1,000)		31.1.2019
Profit (LCY) Current Year	Middle 50 % of Customers		31.1.2019
Company Ownership	Foundation		31.1.2019
No. of employees	1.99		31.1.2019

CT000143

General

No.: CT000143
Type: Person
Company No.: CT000042
Company Name: J & V v.o.s.
Name:
Address: Fillova 128
Address 2:
Post Code: CZ-696 42
City: Vracov

HOME ACTIONS NAVIGATE REPORT

View
New
Delete
Manage

Create Interact
Sales Quotes
Statistics
Process

Apply Template...
Contact Cover Sheet
Report

HOME ACTIONS NAVIGATE REPORT

Company Person Profiles
Picture
Comments
Alternative Address

Contact



Contact Card- Company-new person - (creation from Company card)

Edit - Contact Profile Answers - CT000042 J & V v.o.s. CT00...

HOME CRONUS Internat...

Refresh Find

Page

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 checked="" type="checkbox"/>
Answer	Golf	<input checked="" type="checkbox"/>
Answer	Tennis	<input 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"/>
Question	Personality	<input type="checkbox"/>
Answer	Extrovert	<input checked="" type="checkbox"/>
Answer	Analytical	<input type="checkbox"/>

OK

CT000143

General

No.: CT000143 Country/Region Code:

Type: Person Search Name:

Company No.: CT000042 Phone No.:

Company Name: J & V v.o.s. Salesperson Code:

Name: Salutation Code:

Address: Fillova 128 Last Date Modified:

Address 2: Date of Last Interaction:

Post Code: CZ-696 42 Last Date Attempted:

City: Vracov Next To-do Date:

Lines

Find Filter Clear Filter

Question	Answer	Questions Answered (%)	Last Date Updated
Personality	Extrovert		1.11.2017
Educational level	Master/ Ph.d		1.11.2017
Marital Status	Married		1.11.2017
Hobbies	Golf		1.11.2017
Hobbies	Football		1.11.2017
Sex	Male		1.11.2017

New interaction- use of wizard

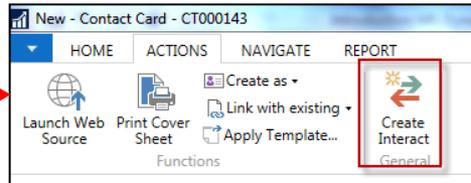
CT000143

General

No.: CT000143 Country/Region Code: Search Name:
Type: Person Address: Fillova 128 Last Date Modified:
Company No.: CT000042 Phone No.:
Company Name: J & V v.o.s. Salesperson Code:
Name: Salutation Code:
Address 2: Last Date Attempted:
Post Code: CZ-696 42 Next To-do Date:
City: Vracov

Lines

Question	Answer	Questions Answered (%)	Last Date Updated
Personality	Extrovert		1.11.2017
Educational level	Master/ Ph.d		1.11.2017
Marital Status	Married		1.11.2017
Hobbies	Golf		1.11.2017
Hobbies	Football		1.11.2017
Sex	Male		1.11.2017



Edit - Create Interaction - CT000042 J & V v.o.s. CT000143

ACTIONS NAVIGATE CRONUS Internatio... ?

Next Finish Refresh Page

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

Who are you interacting with?:

What is the type of interaction?: INCOME

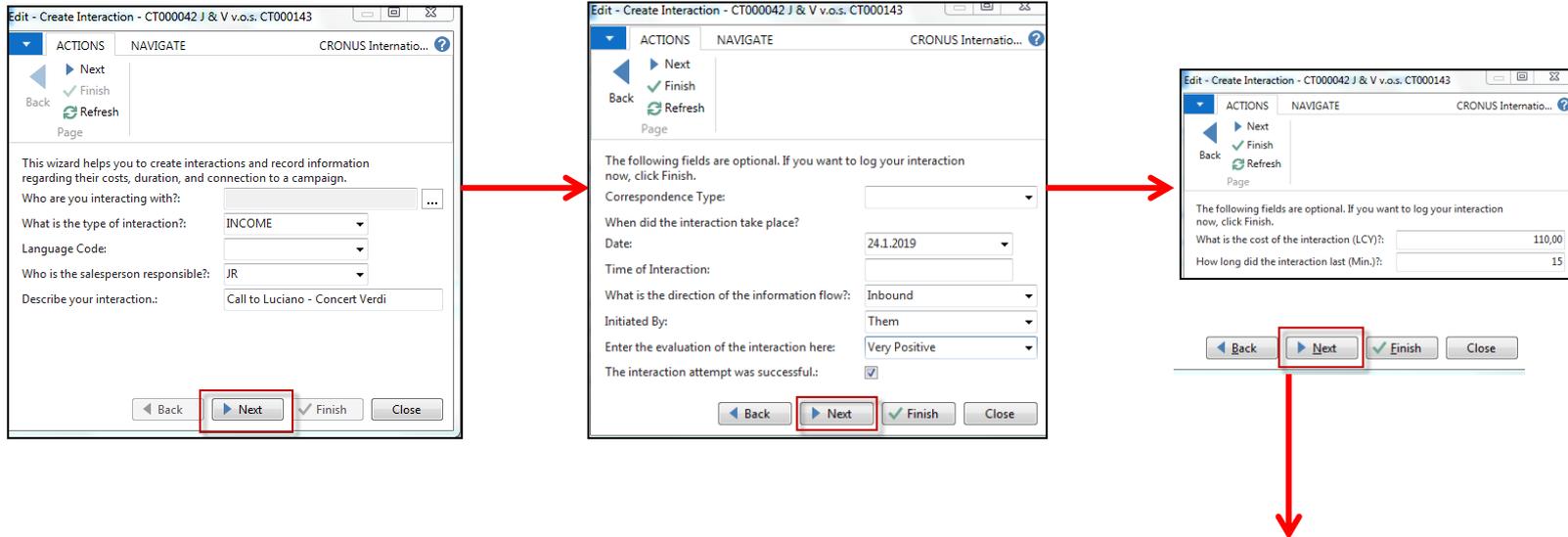
Language Code:

Who is the salesperson responsible?: JR

Describe your interaction.: Call to Luciano - Concert Verdi

Back Next Finish Close

New interaction- use of wizard



Click finish (do not take any optional information into consideration) and **Ctrl-F7** to display **Interaction Log Entries**

The screenshot shows the 'Interaction Log Entries' window with the following data:

C..	A.. F..	Date	Interaction Template...	Description	Att...	Contact No.	Evaluation	Cost (LCY)	Dura... (Mi...	Salesperson Code	Campaign No.	O N
		24.1.2019	INCOME	Call to Luciano - Concert Verdi		CT000143	Very Positive	110,00	15	JR		

Another CRM area : Opportunity

From searching window

The screenshot displays the Microsoft Dynamics NAV interface. The ribbon at the top includes the 'Create Opportunity' button, which is highlighted with a red box. Below the ribbon, the 'Opportunities' table is visible, with a dropdown menu showing 'Opportunities'. The 'Edit - Create Opportunity - untitled' wizard window is open, showing the following fields:

- Describe the opportunity?: Selling ERP MS Dynamics NAV 2016w1
- What is the date of the opportunity?: 24.1.2019
- What is the priority of the opportunity?: High

The 'Next' button at the bottom of the wizard is highlighted with a red box.

Current Cycl...	Campaign No.	Campaign Description
1	CP1002	Event
	CP1002	Event
	CP1002	Event

Another CRM area: Opportunity

Edit - Create Opportunity - untitled

ACTIONS

Next
Back
Finish
Refresh
Page

CRONUS Internation...

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

Which contact is involved?: Greg Chapman

Which salesperson is involved with this opportunity?: JR

What is the sales cycle code?: EX-LARGE

Back Next Finish Close

Edit - Create Opportunity - untitled

ACTIONS

Next
Back
Finish
Refresh
Page

CRONUS Internation...

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)?: 3 000 000,00

What are the chances of success (%): 40

What is the estimated closing date?: 1.5.2019

Back Next Finish Close

Opportunities

Type to filter (F3) | No.

No.	Clos...	Creation Date	Description	Contact No.	Salespers... Code	Status	Current Sales Cycl...	Campaign No.	Campaign Description
OP000001	<input type="checkbox"/>	24.1.2019	Selling ERP MS Dynamics N...	CT200081	JR	Not Started			
OP000002	<input type="checkbox"/>	24.1.2019	Selling ERP MS Dynamics N...	CT200081	JR	In Progress	1		
OP100001	<input type="checkbox"/>	3.11.2018	New tables	CT200116	BD	In Progress	1	CP1002	Event

Another CRM area : Opportunity

OP000002 · Selling ERP MS Dynamics NAV 2016w1

General

No.:	OP000002	Sales Document No.:	
Description:	Selling ERP MS Dynamics NAV 2016w1	Campaign No.:	
Contact No.:	CT200081	Priority:	High
Contact Name:	Greg Chapman	Sales Cycle Code:	EX-LARGE
Contact Company Name:		Status:	In Progress
Salesperson Code:	JR	Closed:	<input type="checkbox"/>
Sales Document Type:		Creation Date:	24.1.2019
		Date Closed:	

Lines

Find Filter Clear Filter

Active	Action Taken	Sales Cycle Stage	Sales Cycle 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	24.1.2019	1.5.2019	3 000 000,00	24 000,00	2	40	1



Sales Cy...	Stage	Description
EX-LARGE	1	Initial
EX-LARGE	2	Understanding needs meeting
EX-LARGE	3	Product Presentation/Workshop
EX-LARGE	4	Proposal
EX-LARGE	5	Sign Contract

Advanced Set as default filter column

Personal profile creation

The image shows a software navigation interface with a left sidebar and a right main content area. The sidebar contains a tree view of departments and settings. The main content area is titled 'Marketing' and lists various setup options under 'Lists' and 'Tasks' categories. Red boxes highlight the 'Application Setup' and 'Marketing' items in the sidebar, and the 'Questionnaire Setup' item in the main content area. A red arrow points from the 'Marketing' item in the sidebar to the 'Questionnaire Setup' item in the main content area.

Departments	Marketing
▷ Financial Management	
▷ Sales & Marketing	
▷ Purchase	
▷ Warehouse	
▷ Manufacturing	
Jobs	
Resource Planning	
▷ Service	
Human Resources	
▲ Administration	
▷ IT Administration	
▲ Application Setup	Lists
General	Business Relations
Users	Industry Groups
▷ Financial Management	Web Sources
▲ Sales & Marketing	Job Responsibilities
Sales	Organizational Levels
Marketing	Interaction Groups
	Interaction Templates
	Salutations
	Mailing Groups
	Campaign Status
	Sales Cycles
	Close Opportunity Codes
	Questionnaire Setup
	Activities
	Tasks
	Marketing Setup
	Interaction Template Setup

Personal profile creation

The screenshot shows a software interface with a top navigation bar and a main content area. The navigation bar contains several icons and labels: 'Edit Questionnaire Setup...' (highlighted with a red box), 'Show as List', 'Show as Chart', 'OneNote', 'Notes', 'Links', 'Refresh', 'Clear Filter', and 'Find Page'. The main content area is titled 'Questionnaire Setup' and contains a table with the following data:

Code	Description	Priority	Contact Type	Business Relatio...
COMPANY	General company informati...	Normal	Companies	
CUSTOMER	Customer information	Normal	Companies	CUST
LEADQ	Lead Qualification	Normal	Companies	PROS
PERSON	General personal information	Normal	People	
PORTF	Customer Portfolio Manage...	Normal	Companies	CUST
POTENTIAL	Customer Sales Potential	Normal	Companies	CUST
SATISF	Customer Satisfaction Index	Normal		CUST

Personal profile creation

Type	Description	Multiple Answers	Priority	Auto Con...	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"/>			51
Answer	Golf	<input type="checkbox"/>	Low	<input type="checkbox"/>			87
Answer	Tennis	<input type="checkbox"/>	Low	<input type="checkbox"/>			81
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

Personal profile creation

Question	Beverages	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Answer	Beer	<input type="checkbox"/>	Normal <input type="checkbox"/>
Answer	Whisky	<input type="checkbox"/>	Normal <input type="checkbox"/>
Answer	Red wine	<input type="checkbox"/>	Normal <input type="checkbox"/>
Answer	Coca-cola	<input type="checkbox"/>	Normal <input type="checkbox"/>

We have entered several lines

Type	Description	Multiple Answers	Priority	Auto Contact Classification	From Value	To Value	No. of Contacts
Question	Hobbies	<input checked="" type="checkbox"/>		<input type="checkbox"/>			
Answer	Football	<input type="checkbox"/>	Low	<input type="checkbox"/>			51
Answer	Golf	<input type="checkbox"/>	Low	<input type="checkbox"/>			87

Profile Contacts

Filter: PERSON • 50000

Contact No.	Contact Company Name	Contact Name
CT000143	J & V v.o.s.	
CT100002	Eco Office Inc.	Christie Moon
CT100122	VAG - Jürgensen	Michael Graff
CT100125	Cane Showroom	Andrew Lan
CT100135	Viksjö Snickerifabrik AB	Andreas Berglund
CT100137	Subacqua	Enrique Gil Gomez
CT100140	The Cannon Group PLC	David Hodgson

All 51 contacts playing football

Personal profile creation

Profile of one chosen contact card (type person)

Lines			
Find	Filter	Clear Filter	
Question	Answer	Questions Answered (%)	Last Date Updated
Marital Status	Married		31.1.2019
Hobbies	Golf		31.1.2019
Sex	Female		31.1.2019

Question	Beverages	<input type="checkbox"/>
Answer	Beer	<input checked="" type="checkbox"/>
Answer	Whisky	<input checked="" type="checkbox"/>
Answer	Red wine	<input checked="" type="checkbox"/>
Answer	Coca-cola	<input type="checkbox"/>

Lines			
Find	Filter	Clear Filter	
Question	Answer	Questions Answered (%)	Last Date Updated
Beverages	Red wine		2.11.2017
Beverages	Whisky		2.11.2017
Beverages	Beer		2.11.2017
Marital Status	Married		31.1.2019
Hobbies	Golf		31.1.2019
Sex	Female		31.1.2019

Pareto analysis-see extra example material

The image shows a sequence of three screenshots illustrating the navigation path to create a Pareto analysis questionnaire in SAP. The first screenshot shows the SAP navigation tree with 'Administration', 'Application Setup', and 'Sales & Marketing' highlighted. The second screenshot shows the 'Marketing' list with 'Questionnaire Setup' selected. The third screenshot shows the 'Questionnaire Setup' table with the 'PARETO' entry highlighted.

Navigation Path:

- Administration
- Application Setup
- Sales & Marketing
- Marketing
- Questionnaire Setup

Questionnaire Setup Table:

Code	Description	Priority	Contact Type	Business Relation...
PARETO	Pareto analysis	Normal	Companies	CUST
COMPANY	General company information	Normal	Companies	
CUSTOMER	Customer information	Normal	Companies	CUST
LEADO	Lead Qualification	Normal	Companies	PROS

Pareto analysis –specification of questionnaire

QUESTIONNAIRE SETUP

Code	Description	Priority	Contact Type	Business Relatio...
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 Managem	Normal	Companies	CUST
POTENTIAL	Customer Sales Potential	Normal	Companies	CUST
SATISF	Customer Satisfaction Index	Normal		CUST
PARETO	Pareto analysis	Normal	Companies	CUST

Set Work D...

Set Work Date

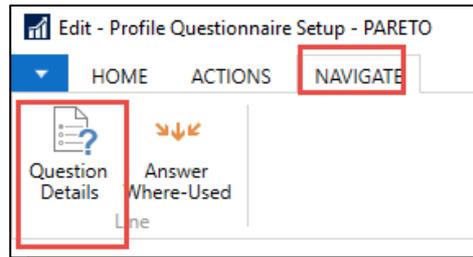
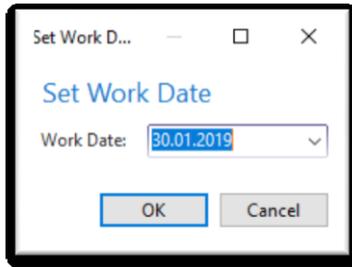
Work Date: 30.01.2019

OK Cancel

QUESTIONNAIRE SETUP

Type	Description	Multiple Answers	Priority	Auto Contact Classification	From Value	To Value	No. of Contacts
Question		<input type="checkbox"/>		<input type="checkbox"/>			

Pareto analysis-specification of question (details)



Starting Date Formula = -5Y means NAV will trace **all entries** five years backward.
Could be also CM-5Y.

A screenshot of the 'PARETO · Pareto' configuration form. The 'General' section has 'Description: Pareto' and 'Multiple Answers: '. The 'Classification' section has 'Auto Contact Classification: ', 'Customer Class. Field: Sales (LCY)', 'Vendor Class. Field:', 'Contact Class. Field:', and 'Min. % Questions Answered:'. On the right, 'Starting Date Formula: -5Y', 'Ending Date Formula: CM', 'Classification Method: Defined Value', 'Sorting Method:', and 'No. of Decimals: 0'. A red box highlights the 'Starting Date Formula' and 'Ending Date Formula' fields, with a blue arrow pointing to them. A red box highlights the 'Auto Contact Classification' checkbox, with a red arrow pointing to it. An 'OK' button is at the bottom right.

CM=Current months

Pareto analysis

Edit - Profile Questionnaire Setup - PARETO

HOME ACTIONS NAVIGATE

CRONUS International Ltd.

Functions

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

Limits for different levels (A-C)

Type	Description	Multiple Answers	Priority	Auto Contact Classification	From Value	To Value	No. of Contacts
Question	Pareto	<input type="checkbox"/>		<input checked="" type="checkbox"/>			
Answer	A	<input type="checkbox"/>	Normal	<input type="checkbox"/>	1 501	600 000	11
Answer	B	<input type="checkbox"/>	Normal	<input type="checkbox"/>	801	1 500	3
Answer	C	<input type="checkbox"/>	Normal	<input type="checkbox"/>	1	800	2

Edit - Profile Questionnaire Setup - PARETO

HOME ACTIONS NAVIGATE

Functions

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

Options

Date: 30.01.2019

Profile Questionnaire Header

Show results:

- Where Code is PARETO
- And Description is Enter a value.
- And Business Relation Code is CUST

+ Add Filter

Schedule... OK Cancel

Pareto analysis –results of updated questionnaire

Edit - Profile Questionnaire Setup - PARETO

CRONUS International Ltd. ?

HOME ACTIONS NAVIGATE

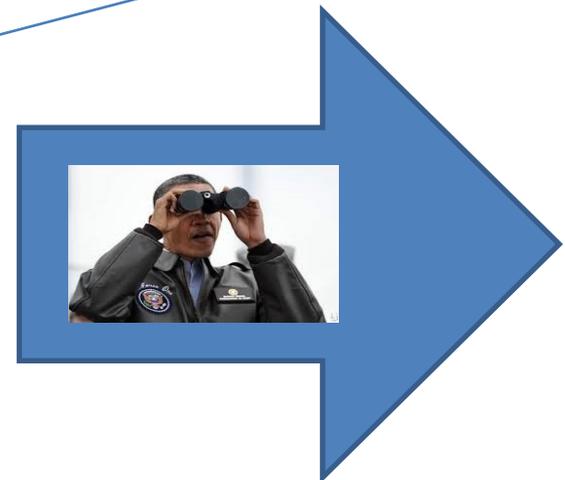
Create Rating Update Classification Move Up Move Down Print Test Report

Type	Description	Multiple Answers	Priority	Auto Contact Classification	From Value	To Value	No. of Contacts
Question	Pareto	<input type="checkbox"/>		<input checked="" type="checkbox"/>			
Answer	A	<input type="checkbox"/>	Normal	<input type="checkbox"/>	1 501	600 000	11
Answer	B	<input type="checkbox"/>	Normal	<input type="checkbox"/>	801	1 500	3
Answer	C	<input type="checkbox"/>	Normal	<input type="checkbox"/>	1	800	2

Profile Contacts

Type to filter (F3) | Contact No. | Filter: PARETO • 40000

Contact No.	Contact Company Name	Contact Name
CT000056	Englunds Kontorsmöbler AB	Englunds Kontorsmöbler AB
CT000063	Guildford Water Department	Guildford Water Department



One of Contact Cards marked by code C

CT000056 · Englunds Kontorsmöbler AB

General

No.: ... Country/Region Code: SE

Type: Company Search Name: ENGLUNDS KONTOR...

Company No.: CT000056 Phone No.: ...

Company Name: Englunds Konto... ... Salesperson Code: JR

Name: Englunds Konto... ... Salutation Code: COMPANY

Address: Kungsgatan 18 Last Date Modified: 31.03.2017

Address 2: Date of Last Interaction: 20.01.2019

Post Code: SE-600 03 Last Date Attempted: 20.01.2019

City: Norrköbing Next To-do Date:

Lines

Find Filter Clear Filter

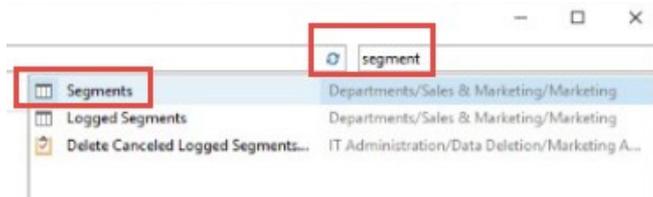
Question	Answer	Questions Answered (%)	Last Date Updated
Discount (%) Last Year	Low discount usage		31.01.2019
Discount (%) Current Year	High discount usage		31.01.2019
Pareto	C		03.11.2017
Customer Purchase Frequency, L...	< 3 times a year		31.01.2019
Customer Purchase Frequency, ...	> 5 times a year		31.01.2019
Turnover (LCY), Last Year	low (below 1,000)		31.01.2019
Turnover (LCY), Current Year	low (below 1,000)		31.01.2019

Communication

Segmentation

Foreign Trade

Segments-see extra example (hands on in lab)



Segments - Microsoft Dynamics NAV

CRONUS International Ltd. ▶ Departments ▶ Sales & Marketing ▶ Marketing ▶ Segments

HOME

New Edit View Delete To-dos Microsoft Excel Show as List Show as Chart OneNote Notes Links Refresh Clear Filter Find

Departments

- Financial Management
- Sales & Marketing
 - Sales
 - Order Processing
 - Marketing
 - Inventory & Pricing
 - Microsoft Dynamics CRM
- Purchase
- Warehouse

Segments

No.	Description	Campaign No.	Salespers... Code	Date
SM10001	Increase sale	CP1001	DC	24.01.2019
SM10002	Event	CP1002	BD	24.01.2019
SM10003	Working place arrangement...	CP1003	JR	24.01.2019
SM10004	Working place arrangement...	CP1003	JR	24.01.2019

Segments

HOME ACTIONS CRONUS International Ltd. ?

 Edit |  View |  New |  Delete |  Log |  Add Contacts... |  Contacts |  Segment |  Attachment |  Criteria |  Opportunities |  To-dos |  Print Cover Sheets |  Print Labels |  Refresh |  Next |  Go to |  Previous

Manage | Process | Contacts | Segment | Attach | Segment | Print | Page

SM00002

General

No.: ... Date: ▾

Description: No. of Lines:

Salesperson Code: ▾ No. of Criteria Actions:

Lines

 Line ▾  Functions ▾  New  Find Filter  Clear Filter

Contact No.	Correspond... Type	Contact Company Name	Contact Name	Description	Salesperson Code	In Te

Segments (entering values..)

Options ^

Allow Existing Contacts:

Expand Companies:

Allow Related Companies:

Ignore Exclusion:

Contact ^

Show results:

✗ Where No. ▼ is Enter a value.

+ Add Filter

Limit totals to:

+ Add Filter

Contact Profile Answer ^

Show results:

✗ Where Profile Questionnaire Code ▼ is PARETO

✗ And Answer ▼ is

+ Add Filter

Segments

SM00002 · Pareto VUP Customers A level

General

No.: ... Date: ▾
Description: No. of Lines:
Salesperson Code: ▾ No. of Criteria Actions:

Lines

Line ▾ Functions ▾ New Find Filter Clear Filter

Contact No.	Correspond... Type	Contact Company Name	Contact Name	Description	Salesperson Code
CT000061		Autohaus Mielberg KG		Pareto VUP Customers A level	JR
CT000060		Beef House		Pareto VUP Customers A level	JR
CT000041		BYT-KOMPLET s.r.o.		Pareto VUP Customers A level	JR
CT000044		Designstudio Gmunden		Pareto VUP Customers A level	JR
CT000033		Heimilisprydi		Pareto VUP Customers A level	JR
CT000062		Hotel Pferdesee		Pareto VUP Customers A level	JR
CT000018		John Haddock Insurance Co.		Pareto VUP Customers A level	PS
CT000058		Klubben		Pareto VUP Customers A level	JR
CT000008		Selangorian Ltd.		Pareto VUP Customers A level	PS
CT000007		The Cannon Group PLC		Pareto VUP Customers A level	PS

End of the section – used in extra picture

(Customer Relationship Management)

