**IT**‘s like you.

# SNC/READYtoUSE

## CRM BASIC

SIEVERS GROUP

# Overview

- "Best Practice" functionalities for your value chain.
- Increase effectiveness and speed
- Improves data quality for the entire organization

- Simplifies the areas:
  - Address maintenance
  - Phone number format
  - File upload by drag & drop
  - Visit-preparation and -execution

SIEVERS GROUP

# Account Form

- Optimized Layout

- New Fields and Options:
  - Industry Code
  - Number of employees
  - Revenue
  - etc.

SIEVERS GROUP

# Overview

- Key Figures:
  - Last Activity
  - Last Visit
  - Opportunities Sum
  - etc.

SIEVERS GROUP

# Account Formula

+ Optimized Layout

+ New Fields and Options:
  - Industry Code
  - Number of employees
  - Revenue
  - etc.

SI

Account: Account

# SIEVERS-GROUP

Account Number
ABC28UU7

Summary | Associations | Details | Related

## ACCOUNT INFORMATION

Account Name *
SIEVERS-GROUP

Account Name 2
---

Account Name 3
---

Key-Accounter
Lukas Gramatowski

Area
Germany

Phone
+49 5550152-0

Other Phone

## ADDRESS

| | |
|---|---|
| Address 1: Street 1 | Hans-Wunderlich-Straße... |
| Address 1: Street 2 | --- |
| Address 1: Street 3 | --- |
| Address 1: City | Osnabrück |
| Address 1: State/Province | Niedersachsen |
| Address 1: ZIP/Postal Code | 49078 |
| Address 1: Country/Region | Germany |
| mailbox number | --- |
| Address 2: Street 1 | --- |

## KEY VALUES

Latest Visit
9/12/2019

Latest visit report
9/2/2019

Last updated:
9/23/2019 1:42 AM

Total open Opportunities
$200,000.00

Last updated:
9/23/2019 1:42 AM

Latest activity
9/13/2019

Total invoiced invoices
$1,000,000.00

# Account Formula

+ Key Figures:
  - Last Activity
  - Last Visit
  - Opportunities Sum
  - etc.

+ Account Hierarchy - Activities
+ Drag & Drop File upload
+ Phone-Numer validation

**IT**‘s like you.

Dynamics 365 | Sales > Accounts > SIEVERS-GROUP | Lukas Gramatowski

New | Open Org Chart | Deactivate | Connect | Add to Marketing List | Assign | Email a Link | Delete | Refresh

- Home
- Recent
- Pinned

**My Work**

- Dashboards
- Activities

**Customers**

- Accounts
- Contacts

**Sales**

- Leads
- Opportunities
- Competitors

**Collateral**

- Quotes
- Orders

Sales

SI

Account: Account

# SIEVERS-GROUP

Account Number

ABC28UU7

Summary | Associations | Details | Related

## ACCOUNT INFORMATION

| | |
|---|---|
| Account Name * | SIEVERS-GROUP |
| Account Name 2 | --- |
| Account Name 3 | --- |
| Key-Accounter | Lukas Gramatowski |
| Area | Germany |
| Phone | +49 5550152-0 |
| Other Phone | |

## ADDRESS

| | |
|---|---|
| Address 1: Street 1 | Hans-Wunderlich-Straße... |
| Address 1: Street 2 | --- |
| Address 1: Street 3 | --- |
| Address 1: City | Osnabrück |
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## KEY VALUES

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9/12/2019

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9/2/2019
Last updated:
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Total open Opportunities
$200,000.00
Last updated:
9/23/2019 1:42 AM

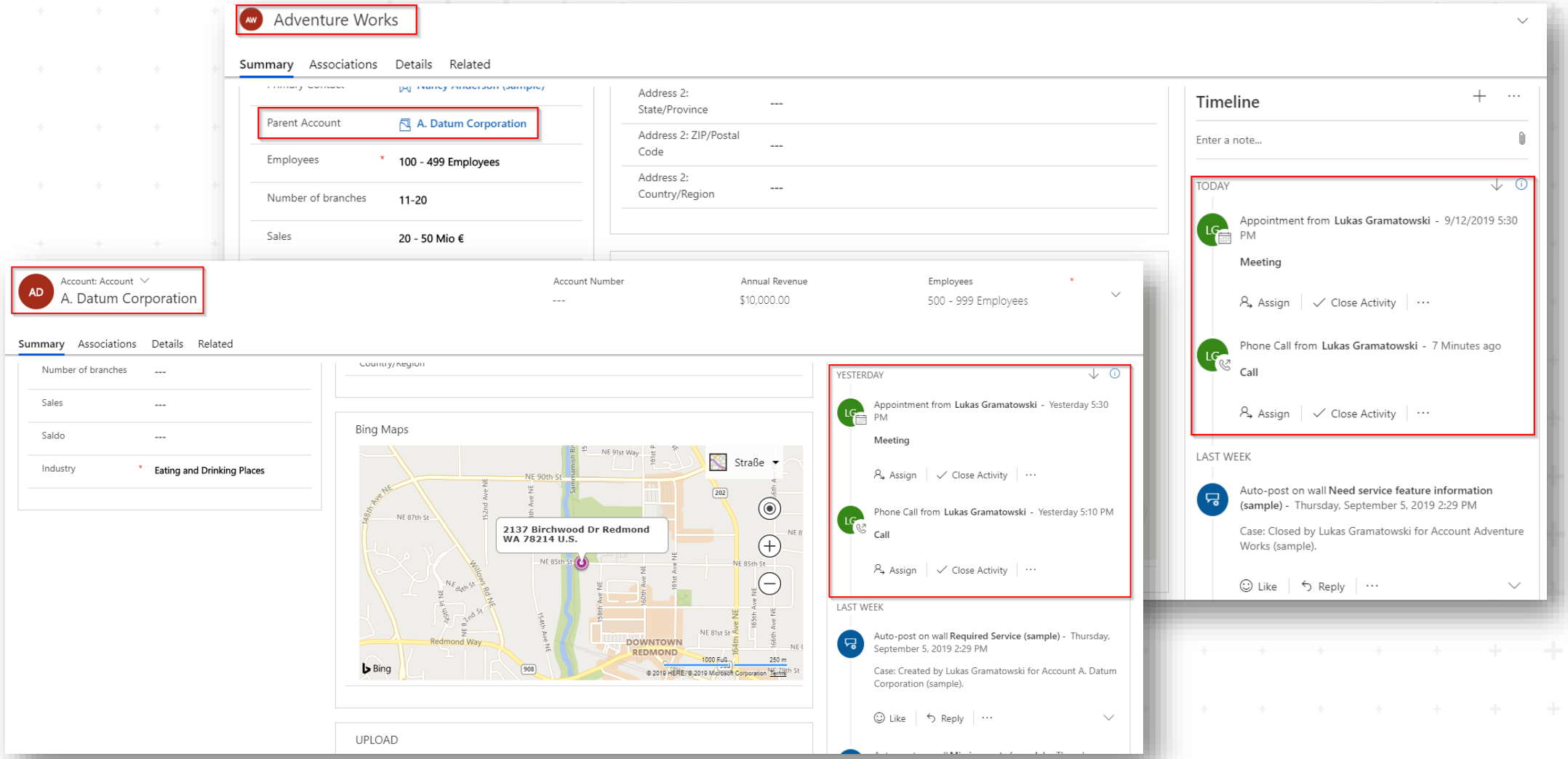
Latest activity
9/13/2019

Total invoiced invoices
$1,000,000.00

Active | Save

**IT**‘s like you.

# Account Hierarchy - Activities



# SIEVERS-GROUP



Extraction of crude oil and natural gas

+ Kopieren

UPLOAD

Zum Hochladen einer Datei ziehen Sie sie hierher.

Assign | Close Activity | ...

Appointment from **Lukas Gramatowski** - Wednesday, September 4, 2019 8:30 AM

**Meeting**

Assign | Close Activity | ...

Email from **Lukas Gramatowski** - Friday, September 13, 2019 8:03 AM

**Mail CRM:0001001**

Assign | Add to Queue | ...

Auto-post on wall **My New Opportunity** - Thursday,

SI

Account: Account

# SIEVERS-GROUP

Account Number
ABC28UU7

Summary | Associations | Details | Related

Account Name 3
---

Key-Accounter
Lukas Gramatowski

Area
Germany

Phone
---

Other Phone
---

fax number
---

Email
someone3@example.com

Website

| | |
|---|---|
| Address 1: City | Osnabrück |
| Address 1: State/Province | Niedersachsen |
| Address 1: ZIP/Postal Code | 49078 |
| Address 1: Country/Region | Germany |
| mailbox number | --- |
| Address 2: Street 1 | --- |
| Address 2: Street 2 | --- |
| Address 2: Street 3 | --- |
| Address 2: City | --- |
| Address 2: State/Province | --- |

9/23/2019 5:57 PM

Total open Opportunities
$200,000.00
Last updated:
9/23/2019 5:57 PM

Latest activity
9/13/2019

Total invoiced invoices
$1,000,000.00
Last updated:
9/23/2019 5:57 PM

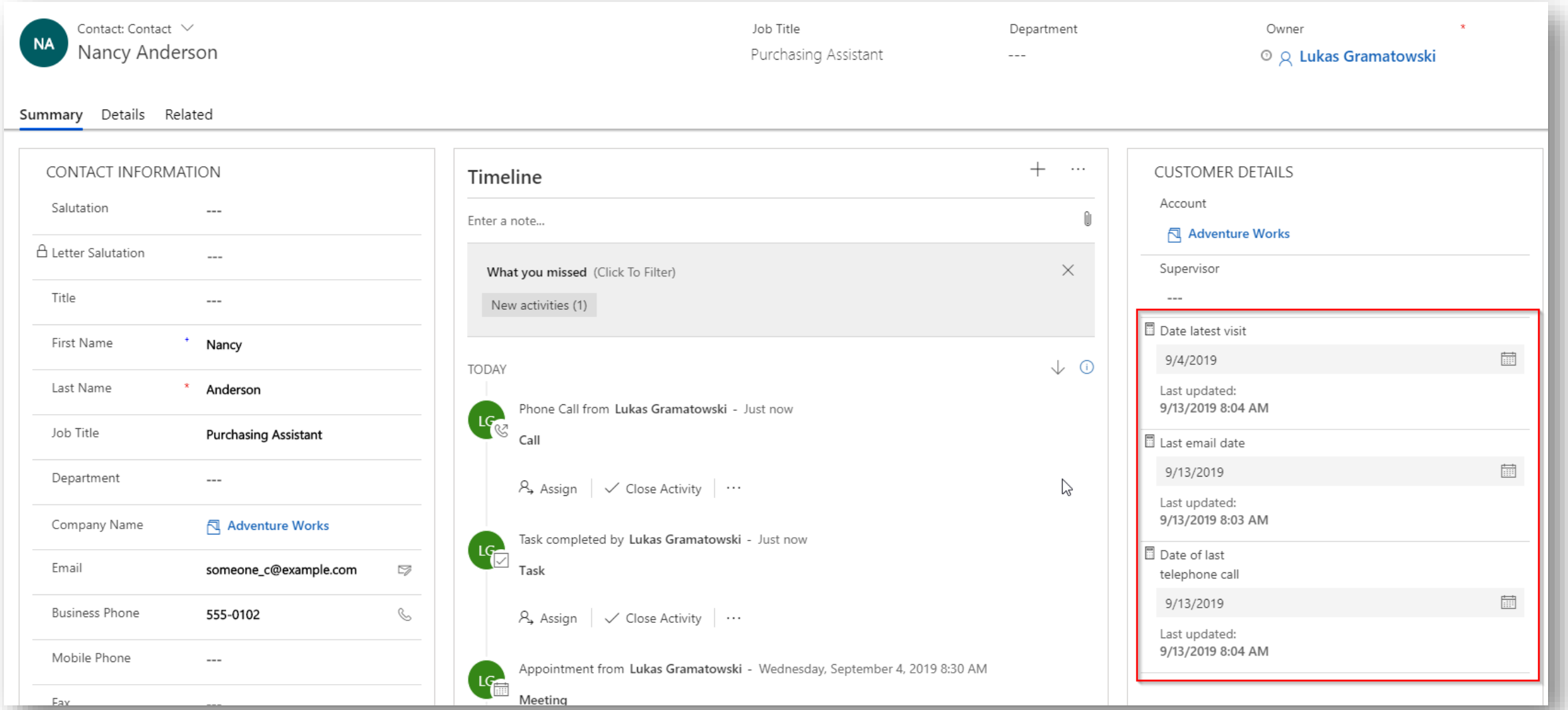
## Timeline

Enter a note...

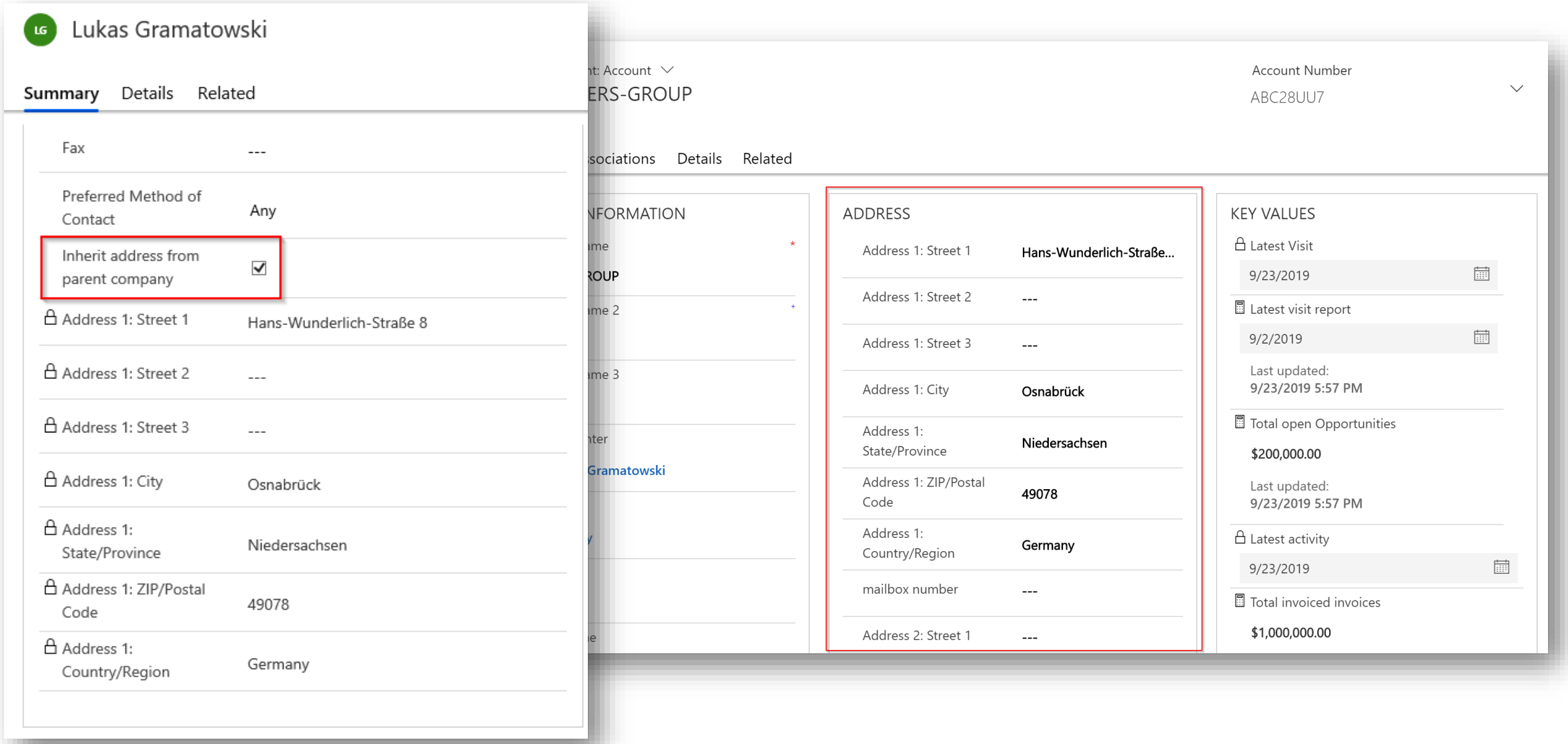
# Contact Formula

- Key Figures:
  - Date last visit
  - Date last email
  - Date last phone call
- Account-Address inheritance
- Letter Salutation
- Phone-Numer validation

**IT**‘s like you.


NA
Contact: Contact
Nancy Anderson
Job Title
Purchasing Assistant
Department
---
Owner
Lukas Gramatowski
Summary
Details
Related
CONTACT INFORMATION
Salutation ---
Letter Salutation ---
Title ---
First Name Nancy
Last Name Anderson
Job Title Purchasing Assistant
Department ---
Company Name Adventure Works
Email someone_c@example.com
Business Phone 555-0102
Mobile Phone ---
Fax
Timeline
Enter a note...
What you missed (Click To Filter)
New activities (1)
TODAY
Phone Call from Lukas Gramatowski - Just now
Call
Assign
Close Activity
Task completed by Lukas Gramatowski - Just now
Task
Assign
Close Activity
Appointment from Lukas Gramatowski - Wednesday, September 4, 2019 8:30 AM
Meeting
CUSTOMER DETAILS
Account
Adventure Works
Supervisor
---
Date latest visit
9/4/2019
Last updated:
9/13/2019 8:04 AM
Last email date
9/13/2019
Last updated:
9/13/2019 8:03 AM
Date of last telephone call
9/13/2019
Last updated:
9/13/2019 8:04 AM

**IT**‘s like you.


LG
Lukas Gramatowski
Summary
Details
Related
Fax
---
Preferred Method of Contact
Any
Inherit address from parent company
Address 1: Street 1
Hans-Wunderlich-Straße 8
Address 1: Street 2
---
Address 1: Street 3
---
Address 1: City
Osnabrück
Address 1: State/Province
Niedersachsen
Address 1: ZIP/Postal Code
49078
Address 1: Country/Region
Germany
ERS-GROUP
Account Number
ABC28UU7
Details
Related
NFORMATION
ROUP
Gramatowski
ADDRESS
Address 1: Street 1
Hans-Wunderlich-Straße...
Address 1: Street 2
---
Address 1: Street 3
---
Address 1: City
Osnabrück
Address 1: State/Province
Niedersachsen
Address 1: ZIP/Postal Code
49078
Address 1: Country/Region
Germany
mailbox number
---
Address 2: Street 1
---
KEY VALUES
Latest Visit
9/23/2019
Latest visit report
9/2/2019
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Total open Opportunities
$200,000.00
Last updated:
9/23/2019 5:57 PM
Latest activity
9/23/2019
Total invoiced invoices
$1,000,000.00

LG

Contact: Contact

# Lukas Gramatowski

Job Title
---

Summary | Details | Related

## CONTACT INFORMATION

Salutation
---

Letter Salutation
---

Title
---

First Name *
**Lukas**

Last Name *
**Gramatowski**

Job Title
---

Department

## Timeline

Enter a note...

TODAY

Email from **Lukas Gramatowski** - 26 Minutes ago

**Mail CRM:0001004**

Assign | Add to Queue | ...

Phone Call from **Lukas Gramatowski** - 27 Minutes ago

**Call**

Assign | Close Activity | ...

## CUSTOMER DETAILS

Account
SIEVERS-GROUP

Supervisor
---

Date latest visit
9/23/2019
Last updated:
**9/23/2019 6:24 PM**

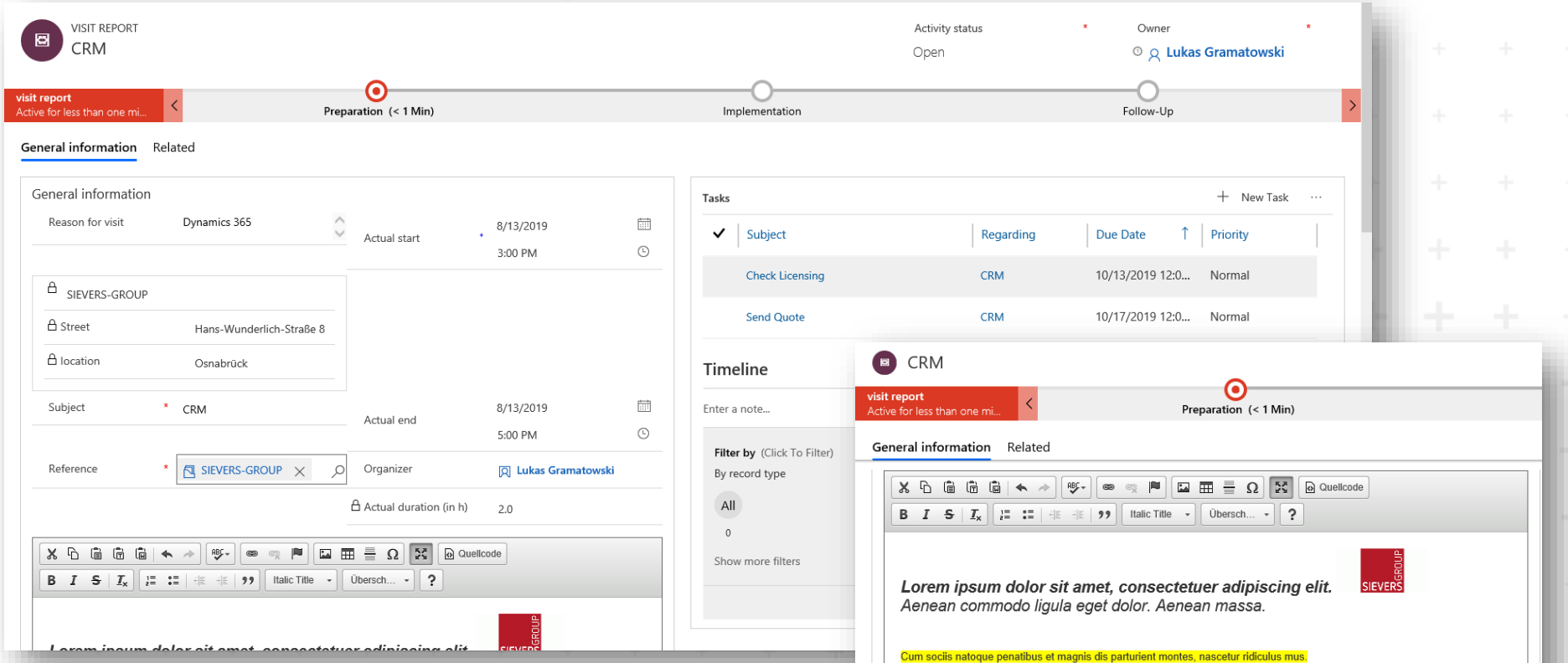
Last email date
9/23/2019
Last updated:
**9/23/2019 6:24 PM**

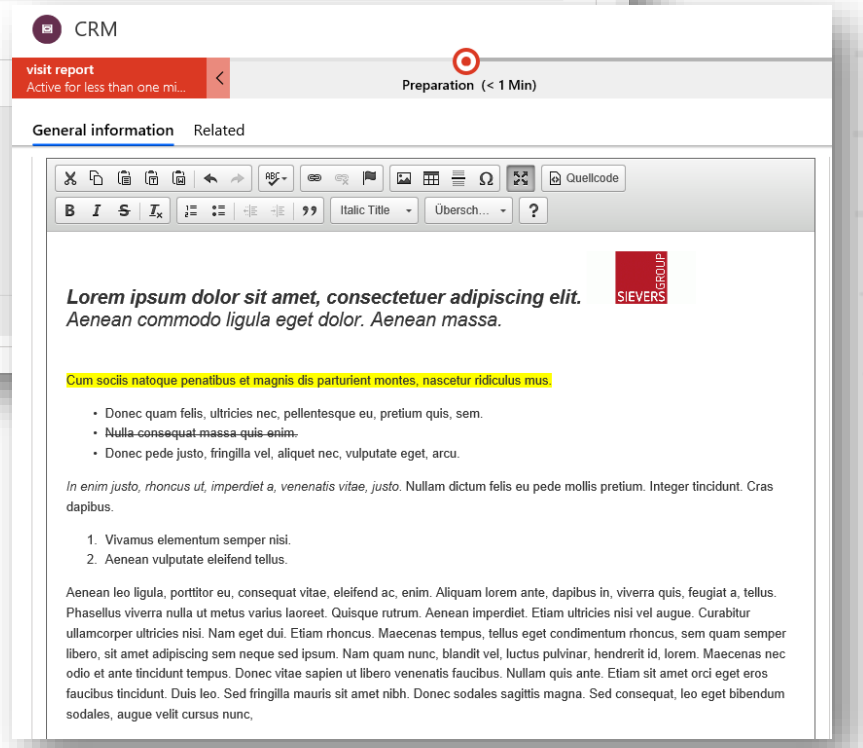
Date of last telephone call
9/23/2019

# Visit Report

- Visit Report
- Visit Preparation
- Text Editor
- Activity-Management

**IT**‘s like you.


VISIT REPORT
CRM
Activity status
Open
Owner
Lukas Gramatowski
visit report
Active for less than one mi...
Preparation (< 1 Min)
Implementation
Follow-Up
General information
Related
General information
Reason for visit
Dynamics 365
Actual start
8/13/2019
3:00 PM
SIEVERS-GROUP
Street
Hans-Wunderlich-Straße 8
location
Osnabrück
Subject
CRM
Actual end
8/13/2019
5:00 PM
Reference
SIEVERS-GROUP
Organizer
Lukas Gramatowski
Actual duration (in h)
2.0
Quellcode
Italic Title
Übersch...
Tasks
New Task
Subject
Regarding
Due Date
Priority
Check Licensing
CRM
10/13/2019 12:0...
Normal
Send Quote
CRM
10/17/2019 12:0...
Normal
Timeline
Enter a note...
Filter by (Click To Filter)
By record type
All
0
Show more filters


CRM
visit report
Active for less than one mi...
Preparation (< 1 Min)
General information
Related
Quellcode
Italic Title
Übersch...
Lorem ipsum dolor sit amet, consectetuer adipiscing elit.
Aenean commodo ligula eget dolor. Aenean massa.
SIEVERS GROUP
Cum sociis natoque penatibus et magnis dis parturient montes, nascetur ridiculus mus.
Donec quam felis, ultricies nec, pellentesque eu, pretium quis, sem.
Nulla consequat massa quis enim.
Donec pede justo, fringilla vel, aliquet nec, vulputate eget, arcu.
In enim justo, rhoncus ut, imperdiet a, venenatis vitae, justo. Nullam dictum felis eu pede mollis pretium. Integer tincidunt. Cras dapibus.
1. Vivamus elementum semper nisi.
2. Aenean vulputate eleifend tellus.
Aenean leo ligula, porttitor eu, consequat vitae, eleifend ac, enim. Aliquam lorem ante, dapibus in, viverra quis, feugiat a, tellus. Phasellus viverra nulla ut metus varius laoreet. Quisque rutrum. Aenean imperdiet. Etiam ultricies nisi vel augue. Curabitur ullamcorper ultricies nisi. Nam eget dui. Etiam rhoncus. Maecenas tempus, tellus eget condimentum rhoncus, sem quam semper libero, sit amet adipiscing sem neque sed ipsum. Nam quam nunc, blandit vel, luctus pulvinar, hendrerit id, lorem. Maecenas nec odio et ante tincidunt tempus. Donec vitae sapien ut libero venenatis faucibus. Nullam quis ante. Etiam sit amet orci eget eros faucibus tincidunt. Duis leo. Sed fringilla mauris sit amet nibh. Donec sodales sagittis magna. Sed consequat, leo eget bibendum sodales, augue velit cursus nunc,

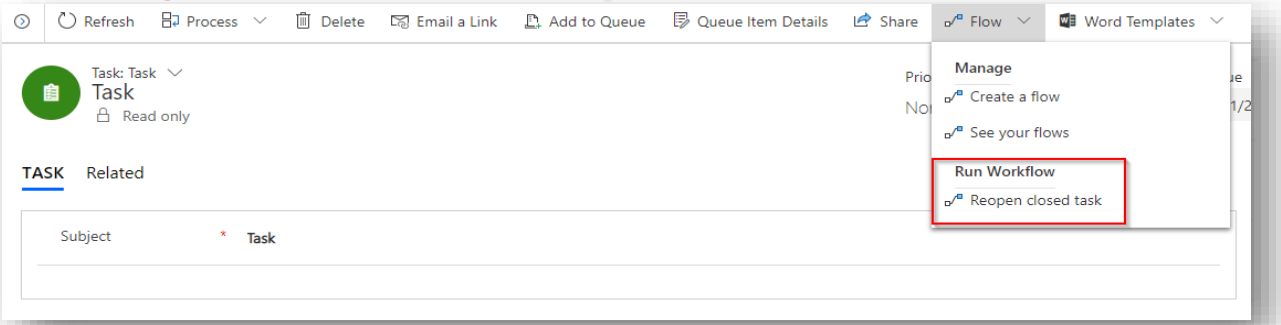
# Tasks

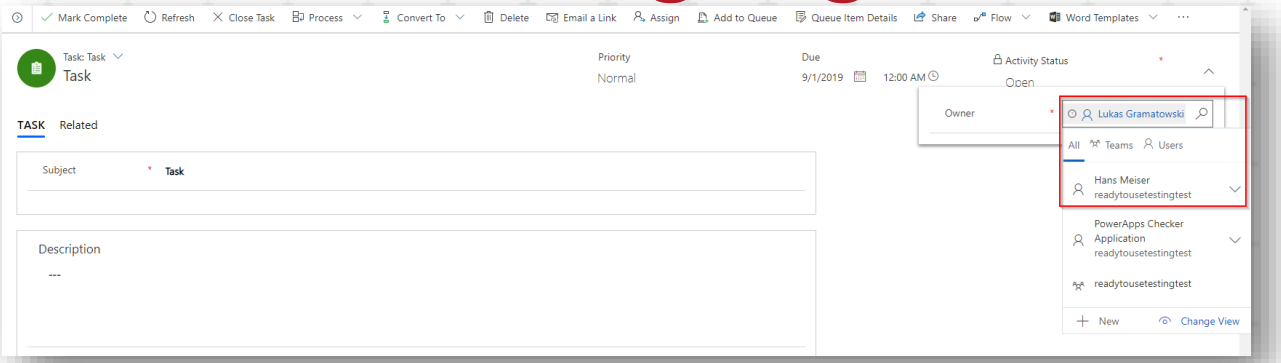
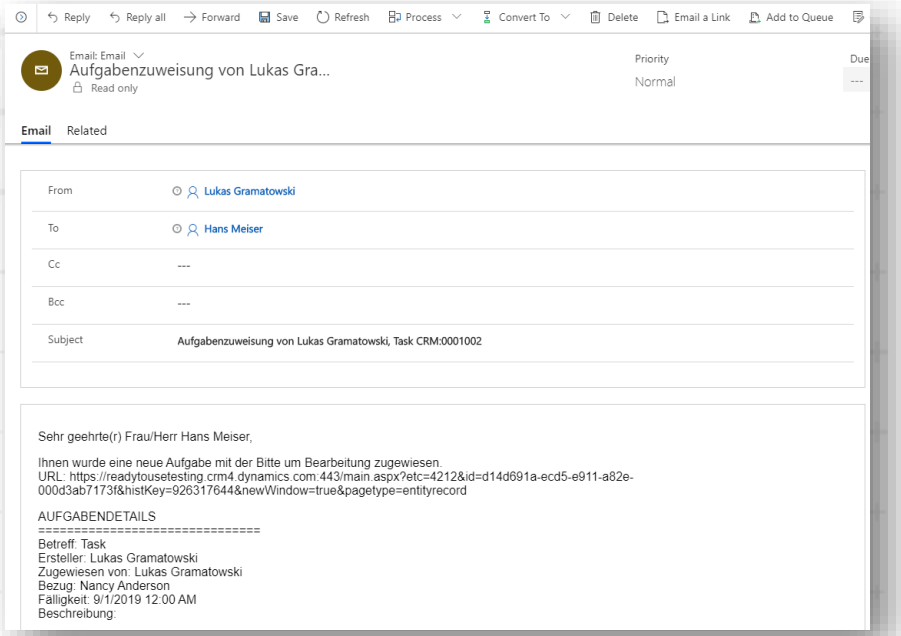
+ Reopen task

+ Email when assigning new owner

IT‘s like you.

# Reopen Task




# Email when assigning new owner