

PERMALEADS CONNECT FÜR MICROSOFT DYNAMICS CRM

Visualisierungen

ZÜRICH | AUGUST 2019



IMPORT DER PERMALEADS-DATEN

Dynamics 365 Sales Leads

IMPORT PERMALEADS

Permaleads

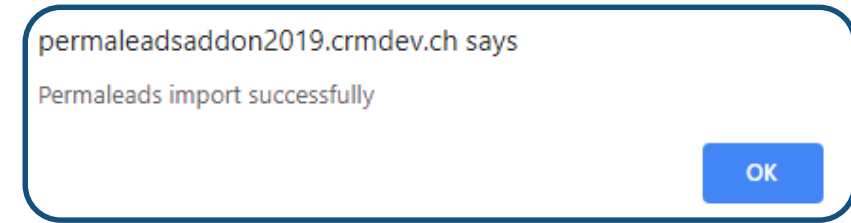
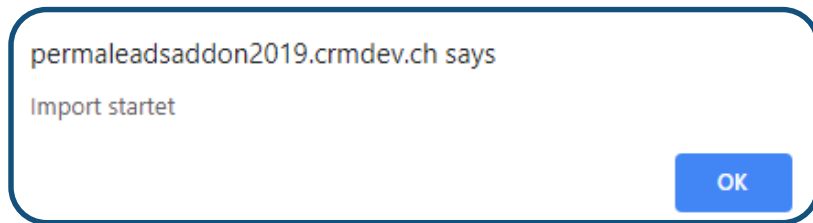
Search for records

Company Name ↑	UID	Name	Visits ↓
Hanseranking GmbH		Permaleads	8
PricewaterhouseCooper AG	CHE-106.839.438	Permaleads	6
arcade solutions ag	CHE-105.484.491	Permaleads	5
Hawa Sliding Solutions AG	CHE-101.416.421	Permaleads	5
Dassault Systemes Se		Permaleads	4
Fenaco Genossenschaft	CHE-106.106.123	Permaleads	4
hostettler autotechnik ag	CHE-106.824.804	Permaleads	4
Bäloise Holding AG	CHE-102.743.957	Permaleads	3
Citel Informatique SA	CHE-110.323.178	Permaleads	3
Universität St.Gallen	CHE-115.978.205	Permaleads	3
CKW Conex AG	CHE-106.838.806	Permaleads	2
DAT Deutsche Automobil Treuhand GmbH		Permaleads	2
ECA Etablissement Assurance Incendie Canton d...	CHE-108.955.251	Permaleads	2
Elektroshop Wagner		Permaleads	2
GENESIS Swiss Team AG	CHE-108.470.315	Permaleads	2
Genossenschaft Gebäudehülle Schweiz	CHE-107.894.888	Permaleads	2
Genossenschaft Migros Aare	CHE-105.792.739	Permaleads	2
Graphax AG	CHE-105.835.260	Permaleads	2
Infocentric Research AG	CHE-113.615.140	Permaleads	2
Newsnet AG		Permaleads	2
Novartis AG	CHE-103.867.266	Permaleads	2
Ticketcorner AG	CHE-112.123.555	Permaleads	2
Young Solutions AG	CHE-109.400.441	Permaleads	2
ACCOR Gestion Hôtelière & Services S.A.	CHE-106.003.397	Permaleads	1
Amt für Informatik Thurgau		Permaleads	1
Arrow ECS Internet Security AG	CHE-110.512.288	Permaleads	1

1 - 49 of 49 (0 selected) | All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z | Page 1



IMPORT – TECHNISCHER PROZESS



ÜBERSICHT DER BESUCHERDATEN

Qualify (Active for 7 days, 19 hours) → Develop → Propose → Close

Existing Contact? [click to enter](#) | Existing Account? [click to enter](#) | Purchase Timeframe [click to enter](#) | Estimated Budget [click to enter](#) | Purchase Process [click to enter](#) | Identify Decision Ma... [mark complete](#) | Capture Summary [click to enter](#)

Lead to Opportunity Sales Process (Active for 7 days, 19 hours) **Next Stage** ↕

COMPANY

Company * Fenaco Genossenschaft
Website <http://fenaco.com>
Address Erlachstrasse 5
3001 Bern
CH

COMPETITORS

No competitors found.

Permaleads

Country/Region CH
UID CHE-106.106.123
Visits 4

Website Visits

Date ↓	View count	Duration	Website URL	Referer
7/12/2019 8:45 AM	5	43	https://www. ch/	https://www. ch/

Website Views

Date ↑	Duration	URL	Referer URL (V...
7/12/2019 8:...	1s	https://www. ch/firma/news/arti...	https://www. ch/
7/12/2019 8:...	25s	https://www. ch/author/angela/	https://www. ch/
7/12/2019 8:...	7s	https://www. ch/	https://www. ch/
7/12/2019 8:...	10s	https://www. ch/wir/#facts_and_...	https://www. ch/
7/12/2019 8:...		https://www. ch/wir/	https://www. ch/

Details

Description

MARKETING INFORMATION

CONTACT METHOD

Open



QUALIFIZIERUNG DES LEADS UND ERÖFFNUNG EINER OPPORTUNITÄT

✓ **Qualify** | **Develop (Active for 1 minute)** | Propose | Close

Customer Need [click to enter](#) | Identify Competitors [mark complete](#)
Proposed Solution [click to enter](#)
Identify Stakeholders [mark complete](#)

Lead to Opportunity Sales Process (Active for 7 days, 19 hours) | **Next Stage** | ^

Summary

Topic: **Permaleads**
Contact: **Max Mustermann**
Account: **Fenaco Genossenschaft**
Purchase Timeframe:
Currency: **Schweizer Franken**
Budget Amount:
Purchase Process:
Description:

Current Situation:
Customer Need:
Proposed Solution:

POSTS | ASSISTANT | ACTIVITIES | NOTES

Enter post here [POST]

All posts | Auto posts | User posts

Max Mustermann
Lead: Qualified by crmadmin crmadmin and converted to Account Fenaco Genossenschaft, Contact Max Mustermann, Opportunity Permaleads.
On Max Mustermann's wall
Today 10:29 AM

Permaleads
Opportunity: Created by crmadmin crmadmin for Account Fenaco Genossenschaft.
On Permaleads's wall
Today 10:29 AM

STAKEHOLDERS

Name ↑	Role
Max Mustermann	Stakeholder

SALES TEAM

No sales team members found.

COMPETITORS

Open

Bei der Qualifizierung eines Leads wird eine Verkaufschance eröffnet. Dabei können Informationen zur Kontaktperson hinzugefügt werden sowie Notizen, Aktivitäten, etc. erfasst werden.



VIEWS- DETAILS

Website Views			
Date ↑	Duration	URL	Referer URL (V...
7/12/2019 8:...	1s	https://www.█/firma/news/arti...	https://www....
7/12/2019 8:...	25s	https://www.█/author/angela/	https://www....
7/12/2019 8:...	7s	https://www.█/	https://www....
7/12/2019 8:...	10s	https://www.█/wir/#facts_and_...	https://www....
7/12/2019 8:...		https://www.█/wir/	https://www....

New View

General

Owner *	crmadmin crmadmin
View ID	4391
Date	7/12/2019 8:46 AM
Duration	10s
URL	https://v█ir/#facts_and_figures
Visit ID	(No name)
Viewer (Lead)	Max Mustermann
Viewer (Account)	Fenaco Genossenschaft



CUSTOMIZING DER LEADS-ÜBERSICHT

My open Permaleads

Search for records

Company Name (Viewer (Lead))	ZIP/Postal Co...	Name (Viewer (Lead))	Business Phone (View...	URL	Duration	Date ↓	Referer URL (Visit ID)
Buholzer Informatik AG	6403	Permaleads		https://www. ch/loesungen/integri...		7/24/2019 10:00 AM	https://www.google.com/
Buholzer Informatik AG	6403	Permaleads		https://www. ch/loesungen/	12s	7/24/2019 10:00 AM	https://www.google.com/
Buholzer Informatik AG	6403	Permaleads		https://www. ch/?gclid=EAlaQobC...	9s	7/24/2019 10:00 AM	https://www.google.com/
Eidg. Forschungsanstalt für Wald, Schnee und La...	8903	Permaleads		https://www. ch/produkte/microsof...		7/24/2019 9:45 AM	https://www.google.com/
Schaltag AG	8307	Permaleads		https://www. ch/produkte/microsof...		7/24/2019 9:11 AM	https://www.google.com/
Graphax AG	8953	Permaleads		https://www. ch/vermeiden-sie-die...		7/24/2019 8:47 AM	https://www.cybersystems.ch/vermeiden-sie-die...
Graphax AG	8953	Permaleads		https://www. ch/was-das-lebensph...	1m 42s	7/24/2019 8:46 AM	https://www.cybersystems.ch/vermeiden-sie-die...
Graphax AG	8953	Permaleads		https://www. ch/vermeiden-sie-die...		7/24/2019 8:41 AM	
Federas Beratung AG	8034	Permaleads		https://. ch/		7/24/2019 7:59 AM	
Confiseur Läderach AG	8755	Permaleads		https://www. ch/		7/23/2019 4:46 PM	https://www.google.com/
MTF Swiss Cloud AG	8201	Permaleads		https://www. ch/produkte/?gclid=...		7/23/2019 3:40 PM	https://www.google.com/
MTF Swiss Cloud AG	8201	Permaleads		https://www. ch/produkte/microsof...	9s	7/23/2019 3:40 PM	https://www.google.com/
MTF Swiss Cloud AG	8201	Permaleads		https://www. ch/produkte/?gclid=...	10s	7/23/2019 3:40 PM	https://www.google.com/
MTF Swiss Cloud AG	8201	Permaleads		https://www. ch/produkte/microsof...	1m 43s	7/23/2019 3:38 PM	https://www.google.com/
hotelleriesuisse	3000	Permaleads		https://www. ch/produkte/microsof...		7/23/2019 3:12 PM	https://www.google.ch/acik?sa=l&ai=DChcSEw...
Direct Mail Company AG	4018	Permaleads		https://www. ch/produkte/microsof...		7/23/2019 1:54 PM	https://www.google.com/
Rosenthaler + Partner AG Management und Info...	4132	Permaleads		https://www. ch/produkte/microsof...		7/23/2019 11:16 AM	https://www.google.ch/
Richter Pharma AG	4600	Permaleads		https://www. ch/loesungen/abteilu...		7/23/2019 10:35 AM	https://www.google.com/
ETH Zürich	8092	Permaleads		https://www. ch/loesungen/branch...		7/23/2019 10:07 AM	https://www.google.com/
ETH Zürich	8092	Permaleads		https://www. ch/blog/	1s	7/23/2019 10:07 AM	https://www.google.com/
ETH Zürich	8092	Permaleads		https://www. ch/jobs/	12s	7/23/2019 10:07 AM	https://www.google.com/
ETH Zürich	8092	Permaleads		https://www. ch/jobs/	4s	7/23/2019 10:07 AM	https://www.google.com/
ETH Zürich	8092	Permaleads		https://www. ch/blog/	19s	7/23/2019 10:06 AM	https://www.google.com/
ETH Zürich	8092	Permaleads		https://www. ch/loesungen/branch...	39s	7/23/2019 10:06 AM	https://www.google.com/
World Health Organization	1211	Permaleads		https://www. ch/produkte/?gclid=E...		7/23/2019 9:25 AM	https://www.google.com/
Osterwalder AG	3250	Permaleads		https://www. ch/produkte/?gclid=E...		7/22/2019 3:16 PM	https://www.google.com/



FILTERDEFINITION DER LEADS

ie (V... | URL | Duration | Date ↓

https://www. ;h/loesungen/integri...		7/24/2019 10:00
https://www. h/loesungen/	12s	7/24/2019 10:00
https://www. h/?gclid=EAlaIqobC...	9s	7/24/2019 10:00
https://www. h/produkte/microsof...		7/24/2019 9:45
https://www. ch/produkte/microsof...		7/24/2019 9:11
https://www. ch/vermeiden-sie-die...		7/24/2019 8:47
https://www. h/was-das-lebensph...	1m 42s	7/24/2019 8:46
htt		7/24/2019 8:41
htt		7/24/2019 7:59
htt		7/23/2019 4:46
htt		7/23/2019 3:40
htt		7/23/2019 3:40
htt		7/23/2019 3:40
htt		7/23/2019 3:38
htt		7/23/2019 3:12
https://www. ch/produkte/microsof...		7/23/2019 1:54

Custom Filters

Show records where URL:

Contains

AND OR

-- Select Operator --

OK Cancel

... | URL | Duration

https://www. ;h/loesungen/integri...	
https://www. ch/loesungen/	12s
https://www. s.ch/loesungen/abteilu...	
https://www. s.ch/loesungen/branch...	
https://www. s.ch/loesungen/branch...	39s
https://www. s.ch/loesungen/integri...	
https://www. s.ch/loesungen/abteilu...	7s
https://www. s.ch/loesungen/#abgel...	9s
https://www. s.ch/loesungen/branch...	23s
https://www. ch/loesungen/#abgel...	13s
https://www. ch/loesungen/integri...	
https://www. ch/loesungen/integri...	22s
https://www. s.ch/loesungen/	
https://www. ch/loesungen/branch...	7s



EXPORT DER LEADS

Dynamics 365 Sales Views

My open Permaleads

Company Name (Viewer (Lead))	ZIP/Postal Co...	Name (Viewer (Lead))	Business Phone (View...	URL	Duration	Date ↓	Referer URL (Visit ID)
Buholzer Informatik AG	6403	Permaleads		https://www. ch/loesungen/integri...		7/24/2019 10:00 AM	https://www.google.com/
Buholzer Informatik AG	6403	Permaleads		https://www. ch/loesungen/	12s	7/24/2019 10:00 AM	https://www.google.com/
Buholzer Informatik AG	6403	Permaleads		https://www. ch/?gclid=EAlaQobC...	9s	7/24/2019 10:00 AM	https://www.google.com/
Eidg. Forschungsanstalt für Wald, Schnee und La...	8903	Permaleads		https://www. ch/produkte/microsof...		7/24/2019 9:45 AM	https://www.google.com/
Schaltag AG	8307	Permaleads		https://www. ch/produkte/microsof...		7/24/2019 9:11 AM	https://www.google.com/
Graphax AG	8953	Permaleads		https://www. ch/vermeiden-sie-die...		7/24/2019 8:47 AM	https://www. ch/vermeiden-sie-die...
Graphax AG	8953	Permaleads		https://www. ch/was-das-lebensph...	1m 42s	7/24/2019 8:46 AM	https://www. ch/vermeiden-sie-die...
Graphax AG	8953	Permaleads		https://www. ch/vermeiden-sie-die...		7/24/2019 8:41 AM	
Federas Beratung AG	8034	Permaleads		https://. ch/		7/24/2019 7:59 AM	
Confiseur Läderach AG	8755	Permaleads		https://www. ch/		7/23/2019 4:46 PM	https://www.google.com/

EXPORTIEREN NACH EX... DATEN IMPORTIEREN | DIAGRAM

- In Excel Online öffnen
- Statische Tabelle
- Statische Tabelle (nur Seite)
- Dynamische Tabelle
- Dynamische PivotTable

In Excel Online öffnen
Exportiert die Rasterdaten nach Excel Online.

Kont... | Kundennum... | Umsatz Total | KA

Die Lead-Informationen können in Excel Online, als statische Tabelle, dynamische Tabelle oder in eine dynamische PivotTable geöffnet und exportiert werden. Vorgenommen Änderungen/Lead-Bearbeitungen in Excel Online und in der dynamischen Tabelle sowie PivotTable werden automatisch ins CRM übernommen



INTERNE AUFGABENZUWEISUNG

LEAD ▾ Permaleads

Lead Source: ----- Rating: Warm Status: New Owner: crmadmin crmadmin

Qualify (Active for 1 hour) → Develop → Propose → Close

Existing Contact? [click to enter](#) | Existing Account? [click to enter](#) | Purchase Timeframe [click to enter](#) | Estimated Budget [click to enter](#) | Purchase Process [click to enter](#) | Identify Decision Ma... [mark complete](#) | Capture Summary [click to enter](#)

Lead to Opportunity Sales Process (Active for 1 hour) **Next Stage** ↕

Summary

CONTACT

Topic* Permaleads
Name* Permaleads
Job Title -----
Business Phone -----
Mobile Phone -----
Email -----

COMPANY

Company* Sword Services SA
Website <http://www.sword-group.com/>
Address Avenue des Baumettes 19
1020 Renens
CH

ACTIVITIES

Subject* Permaleads Akquise
Description please contact the lead and arrange a meeting
Due 7/30/2019 10:30 AM
Priority Normal
Owner* User 2

[OK](#) [Cancel](#)

STAKEHOLDERS

No stakeholders found.

COMPETITORS

No competitors found.

Permaleads

Country/Region	CH
UID	-----
Visite	-----
Open	-----

Website Visits					Website Views			
Date ↓	View count	Duration	Website URL	Referer	Date ↑	Duration	URL	Referer URL (V...
7/18/2019 11:21 AM	1	0	https://www.-----.ch/	https://www.-----.ch/	7/18/2019 1...		https://www.cybersystems.ch/produkte/micr...	https://www.-----.ch/



Jetzt PERMALEADS CONNECT für MICROSOFT
DYNAMICS CRM kostenlos testen auf
www.crmbricks.com/xxx



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