

# Cloud2020

## Sensitive Customer Flag

Manage sensitive customers more easily with a plug & play app.

Your business depends on understanding your customers in order that you can create and maintain good customer relationships. Sensitivities such as price/technology preferences/salesperson preferences or geographical preferences/or even that certain information is covered under NDA can now be recorded against both Accounts and Contacts in Microsoft Dynamics 365.



Flagging the Account or Contact as sensitive and recording the reasons why could not be simpler in this App. Simply fill out a field with the reason for the sensitivity flag and our App will do the rest. Once this is done it generates a pop up box every time the Account or Contact is opened and means that everyone who interacts with them is fully briefed and informed.

Useful for managerial, sales, administrative and accounting staff and many others, this app minimises the risks of customer loss because of lack of clarity or knowledge about their potential sensitivity.

The screenshot shows the Microsoft Dynamics 365 interface for an account named 'Contoso'. The account is marked as 'Sensitive' with a 'Yes' status. A message field contains the text 'Review outstanding invoices before contacting', which is circled in red. A red arrow points from this message to a pop-up dialog box that also displays 'Review outstanding invoices before contacting' with an 'OK' button. The interface includes sections for 'ACCOUNT INFORMATION', 'POSTS', 'ACTIVITIES', 'NOTES', 'CONTACTS', and 'RECENT OPPORTUNITIES'. The 'Sensitive' field is located in the top right corner of the account details.