



WHITE PAPER

CRM Additions

TRIMIT version: **25.2**

Date: **November 7, 2025**

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Introduction

In this document the additions of TRIMIT to BC CRM is described: Extra fields/actions in **Contacts** and **Opportunities** as well as the TRIMIT **Activities**, which can be added to the Contacts and Opportunities as an easy way to keep track of your "to-do" and comments (note) of an Activity.

The audience for this document is the Consultant or very skilled User. It will only describe the TRIMIT fields/functionality and not the standard Business Central fields/functionality. Be aware of not changing settings and parameters in a live database without consulting the implementing partner.

The functionality described is the functionality as **TRIMIT 25.2 for Business Central W1 BC25.X**. The pictures in this White Paper are based on the demo data for **TRIMIT 25.2**, which is based on Microsoft Dynamics 365 Business Central 2025 Release Wave 2, in the demo company **CRONUS TRIMIT W1 Ltd.** (based on CRONUS International Ltd. of Microsoft Dynamics 365 Business Central).

Components

TRIMIT **CRM Activities** contain the following objects:

The tables	6036687	<i>trm Activity</i>
The pages	6036611	<i>trm Opportunity subpage</i>
	6036333	<i>trm CRM Processor Activities</i>
	6036346	<i>trm My Activities</i>
	6036610	<i>trm Activity subpage</i>
	6036702	<i>trm Activities List</i>
	6036709	<i>trm Activities</i>
	6036711	<i>trm Activity Create</i>
The reports	6036811	<i>trm Activity Due List</i>
The table extensions	6036550	<i>trm Contact Ext</i> extends Contact
	6036551	<i>trm Marketing Setup Ext</i> extends Marketing Setup
The page extensions	6036601	<i>trm Contact Card Ext</i> extends Contact Card
	6036607	<i>trm Marketing Setup Ext</i> extends Marketing Setup
	6036722	<i>trm Opportunity Card Ext</i> extends Opportunity Card
	6036721	<i>trm Opportunity List Ext</i> extends Opportunity List
	6036726	<i>trm Opportunity Stat.Ext</i> extends Opportunity Statistics
	FactBox	

Setup

Marketing Setup

In the **Marketing Setup** we added extra Parameters:

Marketing Setup

Actions

Related

Automate

Default

Salesperson Code

Territory Code

Country/Region Code

Language Code

Format Region Code

Correspondence Type

Company Salutation Code

Person Salutation Code

Sales Cycle Code

Task Date Calculation

Follow-up Activities

Default Activity Due Date

Close Activity

Integrated Comment Editor

Specify Activities on

GB

ENU

Email

COMPANY

UNISEX

NEW

0D+1W

All Pre-Activities

☐

Contact Company No.

Description of the Parameters:

Default Activity Due Date

This Parameter contains a default Date Formula that will filter the Activities in the **My Due Activities** List. **My Due Activities** is a cue that is shown in the **TRIMIT CRM** profile that will show the TRIMIT Activities with a **Next Contact Date** before or equal to the **Default Activity Due Date**.

CRONUS TRIMIT W1 Ltd.

Marketing

Sales

Posted Documents

All Reports

Contacts

Campaigns

Segments

Opportunities

To-dos

Customers

Sales Quotes

Sales Orders

Complaints

Headline

Click to create an account and access the MyTRIMIT Community

Actions

+ New Contact

+ New Sales Credit Memo

> TRIMIT Help

+ New Opportunity

+ New Complaint

Sales Reports

+ New Sales Quote

> Follow-up

Product Reports

+ New Sales Order

> Find

Activities

My To-dos

My Due Activities

My Due Workflow

My Group Due Workflow

0

2

0

66

> See more

> See more

> See more

> See more

Opportunities

Sales

Payments

My Opportunit... (->3 Month)

My Opportunit... (3 month ->)

My Sales Quotes

My Open Complaints

Blocked Custo... with Orders

Customers wit... Balance

Overdue Sales Invoices

0

0

0

0

0

0

>

>

>

>

>

>

Otherwise, you can find it via **Search Activity Due List**.

My Activities

Card

Related Contacts

Activities

More options

Views

All

Filter list by:

×

Closed

No

×

Next Contact

06/11/25

×

Next Contact ID

ADMIN

+

Filter...

Company No.	Company Name	Agreed Contact	Next Contact	Next Contact ID	Next Activity	Contact Date	Contact ID
CT000024	The Fashion Store UK	6/10/2025	6/10/2025	ADMIN	CALL	6/4/2025	CE
CT000026	The Shoe Store Europe	6/8/2025	6/8/2025	ADMIN	VISIT	6/4/2025	TR

During the visit we will discuss the objectives for next year and the collection for next year summer.

Note

I.e.: The Work Date is June 4, 2025, and the Parameter is 0D+1W → June 11, 2025

Close Activity

This Parameter determines if previous TRIMIT Activities should be closed as well if you close an Activity. You can choose between the following three options:

All Pre-Activities	If you close an Activity, all previous Activities will be closed automatically.
Own Pre-Activities	If you close an Activity, all previous Activities of the same Contact ID (Salesperson/Purchaser) will be closed automatically.
Manually	If you close an Activity, all previous Activities must be closed manually.

Integrated Comment Editor

This will show the TRIMIT Activities (including their Comments) in the Contact List/Card and Opportunity List/Card, and in that part of the page, you are also able to create new TRIMIT Activities on the spot. Once set to *TRUE*, you are not able to set it to *FALSE* again.

Contacts: All

+

New

Delete

Home

Contact

Actions

Related

Reports

Automate

Fewer options

No.	Name ↑	Company Name ↑	Contact Business Relation	Phone No.	Email	Salesperson Code	Territory Code
CT000023	Subcontractor	Subcontractor	Vendor				
CT000024	The Fashion Store UK	The Fashion Store UK	Customer		CharleyNelson@contoso.com	JR	
CT000025	Charley Nelson	The Fashion Store UK	Customer		CharleyNelson@contoso.com	JR	
CT000034	The Furniture Shop UK	The Furniture Shop UK	Customer		DaveHanson@contoso.com	JR	
CT000035	Dave Hanson	The Furniture Shop UK	Customer		DaveHanson@contoso.com	JR	
CT000026	The Shoe Store Europe	The Shoe Store Europe	Customer		W.A.vanBuren@contoso.com	JO	FOREIGN
CT000027	W.A. van Buren	The Shoe Store Europe	Customer		W.A.vanBuren@contoso.com	JO	FOREIGN

Activities

Create Activity

MIN (->Charley Nelson) - PRICES

Send Price List for collection summer next year

06/04/25 - CE (->Charley Nelson) - VISIT

During the visit we will discuss the objectives for next year and the collection for next year summer.

TRIMIT

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Page 5

Opportunities: All

+ New
 Delete
 Activate First Stage
 Close
 Update
 Show Sales Quote
 Create Sales Quote
 Create Interac

No. ↑	Closed	Creation Date	Description	Contact No.	Salesperson Code	Status	Current Sales Cycle Stage	Campaign No.	Campaign D
OP100016	☒	10/9/2025	Assembling furniture	CT000016	JO	Won			
OP100017	☒	10/9/2025	Assembling furniture	CT000018	OF	Won			
OP100018	☒	10/9/2025	Furniture to sales department	CT000022	JO	Won			
OP100019	☒	10/9/2025	Furniture for the conference	CT000014	JO	Won			
OP100022	☐	10/9/2025	Storage facilities	CT000014	BC	In Progress	Initial		
OP100023	☐	10/9/2025	Swivel chair	CT000016	BC	In Progress	Initial		
OP100024	☐	10/9/2025	Table lighting	CT000018	HR	In Progress	Initial		
OP100025	☐	10/9/2025	Guest chairs for the reception	CT000020	HR	In Progress	Initial		

Contact Name Helen Ray
 Contact Company Name Trey Research

Activities

05/25/25 - ADMIN (->Helen Ray) - PRICES
 Send the prices based on the configuration of the required chair.

05/25/25 - ADMIN (->Helen Ray) - CALL
 Discuss details of the required Chair and based on that we will send the price based on the configuration of the required Chair.

By clicking on the **Actions for Activities** (Blue in the above pictures) in the Contact List or Opportunity List, you can create a new Activity:

New Activity - CT000015 · 30000

General

Status

Contact Date 5/30/2025
 Contact ID ADMIN
 Activity CALL
 Contact No. CT000016
 Contact Name Helen Ray

Next

Next Contact
 Next Contact ID ADMIN
 Next Activity

Called Helen Ray to discuss the send pricing

OK Cancel

In the **Contact Card**, you will also see the **Activities** FastTab:

Contact Card CT000016 · Helen Ray

Home Contact Report Actions Related Reports Automate Fewer options

Create Opportunity Create Interaction Create Sales Quote Apply Template...

General Show more

No. CT000016 Company No. CT000015

Name Helen Ray Company Name Trey Research

Type Person Business Relation Customer

Salesperson Code JO

Activities

05/30/25 - ADMIN (->Helen Ray) - CALL
Called Helen Ray to discuss the send pricing.

05/25/25 - ADMIN (->Helen Ray) - PRICES
Send the prices based on the configuration of the required chair.

05/25/25 - ADMIN (->Helen Ray) - CALL
Discuss details of the required Chair and based on that we will send the price based on the configuration of the required Chair.

As well as in the **Opportunity Card**:

Opportunity Card OP100023 · Swivel chair

Home Opportunity More options

Update Create Sales Quote Close Show Sales Quote Create Interaction Postponed Interactions

General Show more

Description Swivel chair Salesperson Code BC

Contact No. CT000016 Sales Cycle Code EXISTING

Contact Name Helen Ray Status In Progress

Sales Cycle Stages New Line Delete Line

Active	Action Taken	Sales Cycle Stage	Stage Description	Date of Change	Estimated Close Date	Estimated Value (LCY)	Calcd. Current Value (LCY)	Completed %	Chances of Success %	Probability %
→	☑	1	Initial	11/13/2024	2/13/2025	500.00	10.00	2	95	2

Activities

05/30/25 - ADMIN (->Helen Ray) - CALL
Called Helen Ray to discuss the send pricing.

05/25/25 - ADMIN (->Helen Ray) - PRICES
Send the prices based on the configuration of the required chair.

05/25/25 - ADMIN (->Helen Ray) - CALL
Discuss details of the required Chair and based on that we will send the price based on the configuration of the required Chair.

Specify Activities on

You can choose on which topic you want to specify the TRIMIT Activities.

You can choose between *Contact Company No.* or *Opportunity No.*

Therefore, it determines for the **Opportunity** which Activities should be shown in the **Opportunity List/Card**: the Activities connected to the **Opportunity**, or the Activities connected to the **Contact No.** of the **Opportunity**.

Do not change the content of this Parameter after you have already created Activities!!

Contacts

In the **Contact Card** we added extra fields:

CT000052 · Woody Allan

Home Contact Report More options

Create Opportunity Create Interaction Create Sales Quote Apply Template...

Misc. Parameters

Salesperson 2		Sell-to Type	
Salesperson 3		Customer Statistics Group	0
Company Group		Attention	☐
Chain		Attention Person	
Sell-to Group		Job Title	

Description of the Fields

Salesperson 2 / 3

You can add a second and third Salespeople/Purchasers to the contact.
I.e., used for Commission/Royalty or for different management layers.

Company Group

You can add a **Customer No.** as being the Company Group of this Contact.

You can only fill this field if the **Contact No.** is a **Type Company**.

You can interpret the **Company Group** as being a Holding Company with several sister companies.

Chain

You can add a **Customer No.** as being the Head Office of a Chain.

You can only fill this field if the **Contact No.** is a **Type Company**.

Sell-to Group / Sell-to Type / Customer Statistics Group

You can determine which groupings you want to use for your Contacts (or Prospects/Customers), that can be used later in the process when the Contact becomes a Customer, and you can see the Statistics for these specific groupings.

Attention

You can set this Boolean to *TRUE* on a Contact of **Type Person** and then see in the **Attention Person** of the related Contact of **Type Company**, which related Contact(s) is (are) the main *Person(s)* for this company

Attention Person

This is a flowfield, showing all the Contacts with the same **Company No.** and the Boolean **Attention** set to *TRUE*.

Note

The **Salesperson 2/3**, **Company Group**, **Chain**, **Sell-to Group**, **Sell-to Type** and **Customer Statistics Group** will also be filled in the Customer if you create a Customer based on the Contact.
Changing these fields after you created the Customer will NOT update the corresponding fields in the Customer.

Contacts List

Contacts: All ▾ | 🔍 | + New | Delete | Home ▾ | Contact ▾ | Actions ▾ | Related ▾ | Reports ▾ | Automate ▾ | Fewer options

No.	Name ↑	Company Name ↑	Contact Business Relation	Email	Salesperson Code	Territory Code
CT000028	Sportswear A/S	Sportswear A/S	Customer	H.C.Andersen@contoso.com	JO	FOREIGN
CT000029	H.C. Andersen	Sportswear A/S	Customer	H.C.Andersen@contoso.com	JO	FOREIGN
CT000061	Standard Vendor	Standard Vendor	Vendor	StandardVendor@contoso.com	AH	FOREIGN
CT000023	Subcontractor	Subcontractor	Vendor	—		
CT000024	The Fashion Store UK	The Fashion Store UK	Customer	CharleyNelson@contoso.com	JR	
CT000025	Charley Nelson	The Fashion Store UK	Customer	CharleyNelson@contoso.com	JR	
CT000034	The Furniture Shop UK	The Furniture Shop UK	Customer	DaveHanson@contoso.com	JR	
CT000035	Dave Hanson	The Furniture Shop UK	Customer	DaveHanson@contoso.com	JR	
CT000026	The Shoe Store Europe	The Shoe Store Europe	Customer	W.A.vanBuren@contoso.com	JO	FOREIGN
CT000027	W.A. van Buren	The Shoe Store Europe	Customer	W.A.vanBuren@contoso.com	JO	FOREIGN
CT000030	The Surf Shop Ltd.	The Surf Shop Ltd.	Customer	G.Rafferty@contoso.com	IR	

Activities ▾

05/25/25 - ADMIN (->Charley Nelson) - PRICES
Send Price List for collection summer next year

06/04/25 - CE (->Charley Nelson) - VISIT
During the visit we will discuss the objectives for next year and the collection for next year summer.

In the Contacts List, you can see the TRIMIT Activities (if **Integrated Comment Editor** in the Marketing Setup is set to *TRUE*) connected to the Contact.

Via **Actions, Create Activity** or by clicking on Actions **for Activities, Create Activity** you can create a TRIMIT Activity.

Via **Related, Related Information, Activities**, you can see an overview of all related TRIMIT Activities.

Contacts: All ▾ | 🔍 | + New | Delete | Home ▾ | Contact ▾ | Actions ▾ | Related ▾ | Reports ▾ | Automate ▾ | Fewer options

No.	Name ↑	Company Name ↑	Contact Business Relation	Related Information	Related Contacts	Territory Code
CT000028	Sportswear A/S	Sportswear A/S	Customer	Tasks	Segments	FOREIGN
CT000029	H.C. Andersen	Sportswear A/S	Customer	Documents	Mailing Groups	FOREIGN
CT000061	Standard Vendor	Standard Vendor	Vendor	History	Activities	FOREIGN
CT000023	Subcontractor	Subcontractor	Vendor	—	Other	
CT000024	The Fashion Store UK	The Fashion Store UK	Customer	CharleyNelson@contoso.com		
CT000025	Charley Nelson	The Fashion Store UK	Customer	CharleyNelson@contoso.com	JR	

Contact Card

Contact Card

CT000024 · The Fashion Store UK

Home Contact Report Actions Related Reports Automate Fewer options

Create Opportunity Create Interaction Create Sales Quote Apply Template...

General

No.

Name

Type Company

Company No. CT000024

Company Name The Fashion Store UK

Business Relation Customer

Salesperson Code JR

Activities

05/25/25 - ADMIN (->Charley Nelson) - PRICES
Send Price List for collection summer next year

06/04/25 - CE (->Charley Nelson) - VISIT
During the visit we will discuss the objectives for next year and the collection for next year summer.

In the Contact Card, you can see the TRIMIT Activities (if **Integrated Comment Editor** in the Marketing Setup is set to *TRUE*) connected to the Contact.

Via **Actions, Create Activity** you can create a TRIMIT Activity.

Via **Related, Related Information, Activities**, you can see an overview of all related TRIMIT Activities.

Contact Card

CT000024 · The Fashion Store UK

Home Contact Report Actions Related Reports Automate Fewer options

Create Opportunity Create Interaction Create Sales Quote Apply Template...

General

No.

Name

Type Company

Company No.

Company Name

Business Relation

Salesperson Code

Related Information

Related Contacts

Segments

Mailing Groups

Activities

Online Map

Other

Opportunities

No specific TRIMIT Fields have been added to the Table of the Opportunities.

Opportunities List

No.	Closed	Creation Date	Description	Contact No.	Salesperson Code	Status	Current Sales Cycle Stage	Campaign
OP100022	☐	10/9/2025	Storage facilities	CT000014	BC	In Progress	Initial	
OP100023	☒	10/9/2025	Swivel chair	CT000016	BC	In Progress	Initial	
OP100024	☐	10/9/2025	Table lighting	CT000018	HR	In Progress	Initial	
OP100025	☐	10/9/2025	Guest chairs for the reception	CT000020	HR	In Progress	Initial	
OP100026	☐	10/9/2025	Storage system	CT000022	HR	In Progress	Initial	
OP100027	☐	10/9/2025	Desks for the service dept.	CT000022	JO	Not Started		
OP100037	☒	10/9/2025	Conference table	CT000020	OF	Lost		

Activities

- 05/30/25 - ADMIN (->Helen Ray) - CALL
Called Helen Ray to discuss the send pricing.
- 05/25/25 - ADMIN (->Helen Ray) - PRICES
Send the prices based on the configuration of the required chair.
- 05/25/25 - ADMIN (->Helen Ray) - CALL
Discuss details of the required Chair and based on that we will send the price based on the configuration of the required Chair.

In the Opportunities List, you can see the TRIMIT Activities (if **Integrated Comment Editor** in the Marketing Setup is set to *TRUE*) connected to the Opportunity.

Via **Actions, Create Activity** or by clicking on Actions **for Activities, Create Activity** you can create a TRIMIT Activity.

Opportunity Card

Opportunity Card

OP100023 · Swivel chair

Home Opportunity Actions Automate Fewer options

Update Create S Functions Show Sales Quote Create Interaction Postponed Interactions

General

Description: Swivel chair
Contact No.: CT000016
Contact Name: Helen Ray
Salesperson Code: BC
Sales Cycle Code: EXISTING
Status: In Progress

Sales Cycle Stages

Active	Action Taken	Sales Cycle Stage	Stage Description	Date of Change	Estimated Close Date	Estimated Value (LCY)	Calcd. Current Value (LCY)	Completed %	Chances of Success %	Probability %
→		1	Initial	11/13/2024	2/13/2025	500.00	10.00	2	95	2

Activites

- 05/30/25 - ADMIN (->Helen Ray) - CALL
Called Helen Ray to discuss the send pricing.
- 05/25/25 - ADMIN (->Helen Ray) - PRICES
Send the prices based on the configuration of the required chair.
- 05/25/25 - ADMIN (->Helen Ray) - CALL
Discuss details of the required Chair and based on that we will send the price based on the configuration of the required Chair.

In the Opportunity Card, you can see the TRIMIT Activities (if **Integrated Comment Editor** in the Marketing Setup is set to *TRUE*) connected to the Opportunity.

Via **Actions, Create Activity** you can create a TRIMIT Activity.

TRIMIT Activities

TRIMIT Activities is a functionality to add Actions and Comments to your Contacts and/or Opportunities, which can also be shown in the List/Card of the Contacts and Opportunities based on the Parameter **Integrated Comment Editor** in the Marketing Setup.

You can create **Activities** via the Contact List/Card (Companies and Persons) and the Opportunity List/Card as described in the previous Chapters **Contacts** and **Opportunities**.

New Activity - CT000042 · 10000

↗ ✕

General

Status

Contact Date 6/4/2025 

Contact ID ADMIN ...

Activity CALL ▾

Contact No. CT000043 ▾

Contact Name Lorenzo Rantucci

Next

Next Contact 6/20/2025 

Next Contact ID CE ...

Next Activity VISIT ▾

Call the main Salesperson to discuss our upcoming Campaign.

A A

A^o

B

/

U



A





















X²

X₂







...

OK

Cancel

Description of the Fields:

Contact Date

When creating a new Activity, it will be filled with the **Work Date**, but you can change this Date.

Contact ID

This is the Salesperson/Purchaser that did the Activity.

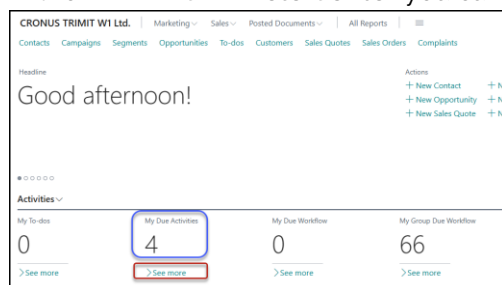
Activity

You can select which **Type of Activity** it concerns.

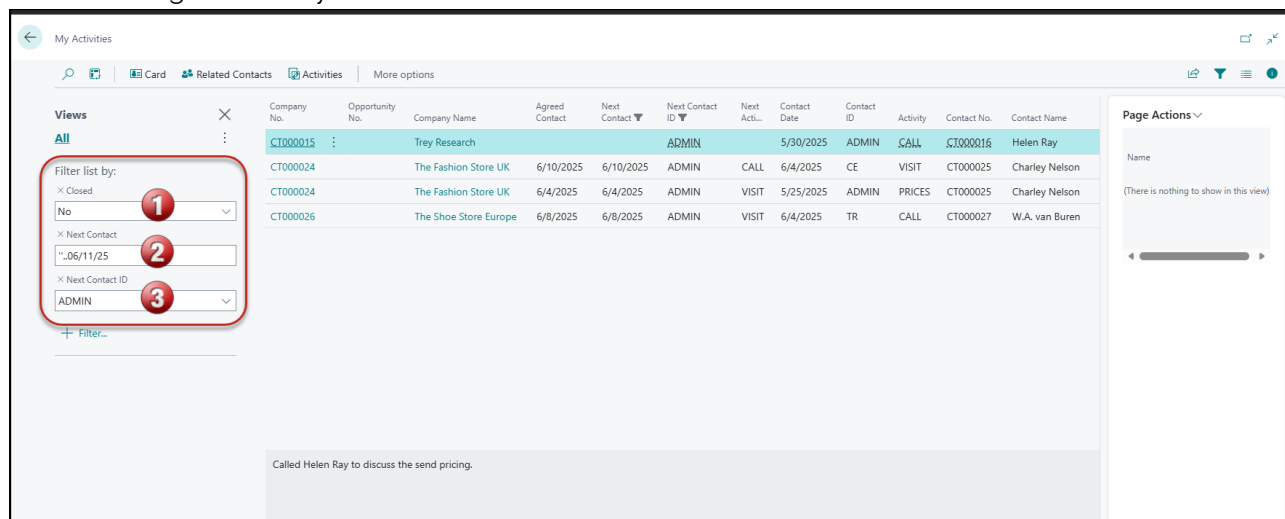
This is not the BC Activities, but a special Table of TRIMIT Activity Types.

My Due Activities

In the **TRIMIT CRM Role Center** you can find the **My Due Activities** cue:



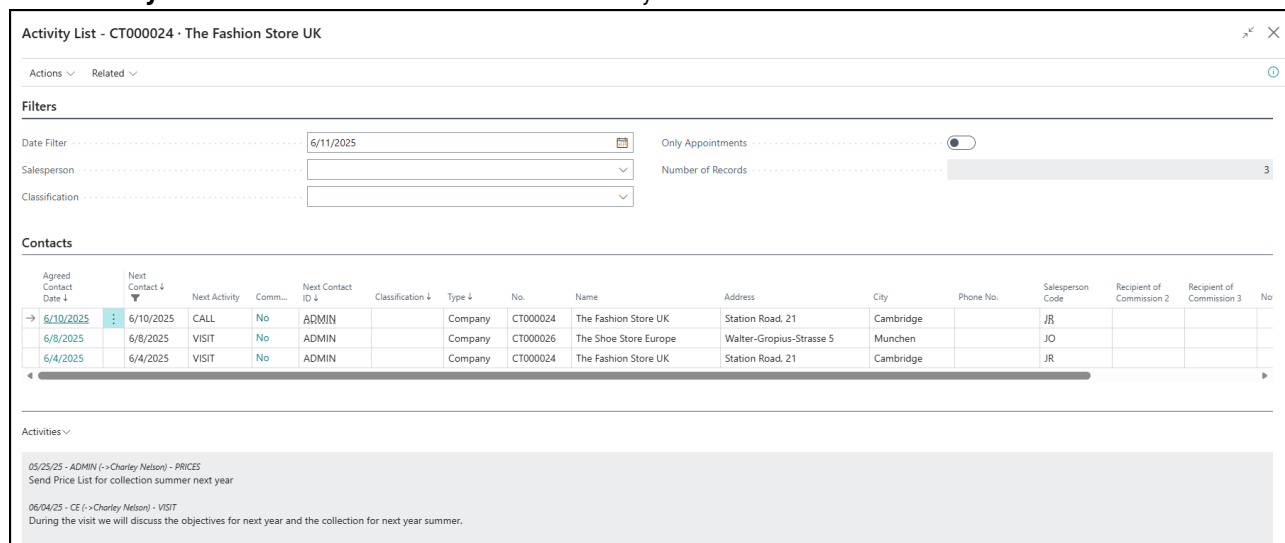
When clicking **See more** you can see the details:



- 1 Only **Open Activities** will be shown by default.
- 2 Only **Open Activities** for which the **Next Contact** is on/before the **Default Activity Due Date** in the Marketing Setup.
- 3 This is your own User ID.

Activity Due List

The **Activity Due List** can be found via **Search** in any Profile.



This will only show the Activities based on the **Filters**.

In **Date Filter** you can enter 1 Date, and the Activities shown will then have a **Next Contact** $\leq$ this **Date Filter**.