9) Partner Relationship Management (CRM)

Who are partners?

1. All companies involved in the business are called cooperation partners
2. Partners can be divided in groups that you define in advance or OZOLS TMS defines it automatically.

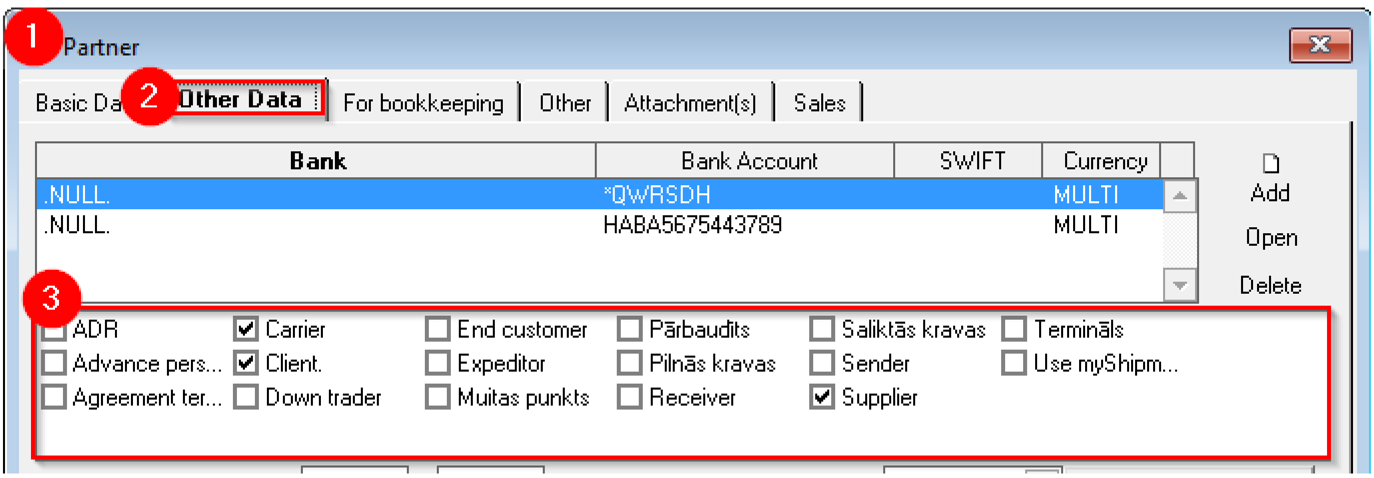
OZOLS TMS automatically divides into the following groups:

Group	**In which case OZOLS TMS marks the partner in the group**
Approoved	If the partner's VAT number can be found in the EU VAT register
Client	If the Customer's order is registered on the partner
Carrier	If a Trip/Spedition is registered to a partner
Sender	If a partner is selected as the sender in the Customer's order
Recipient	If a partner is selected as the recipient in the Customer's order

Users can manually create and assign partners to other groups.

To see or change the group of Partner:

1. Open Partner card
2. Choose page- Other data
3. The check mark indicates to which group the partner is added



Partners can be filtered by group in the reports and in the list of partners.

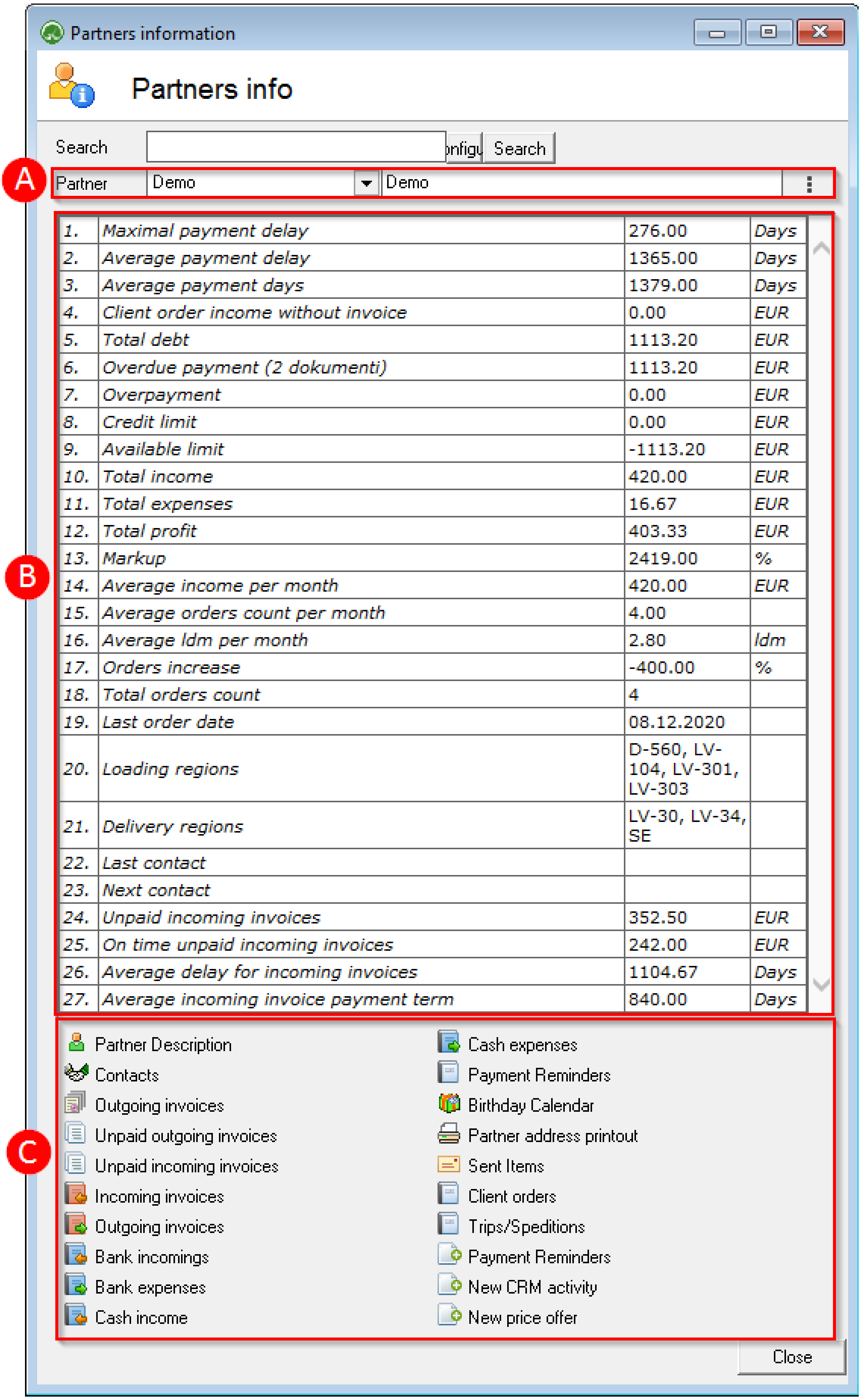
Some of the more frequently used **groups of partners** and contacts : Forwarding company, Final (direct) customer, Combined loads, Full loads, Send holiday greetings, Send information about promotions, etc.

Partner cooperation summary (F3)

> **The partner cooperation summary is** opened by pressing the function key **F3**

This window displays the following information:

A) Partner name
B) Cooperation summary
C) Shortcuts to OZOLS TMS sections with Partner Cooperation information



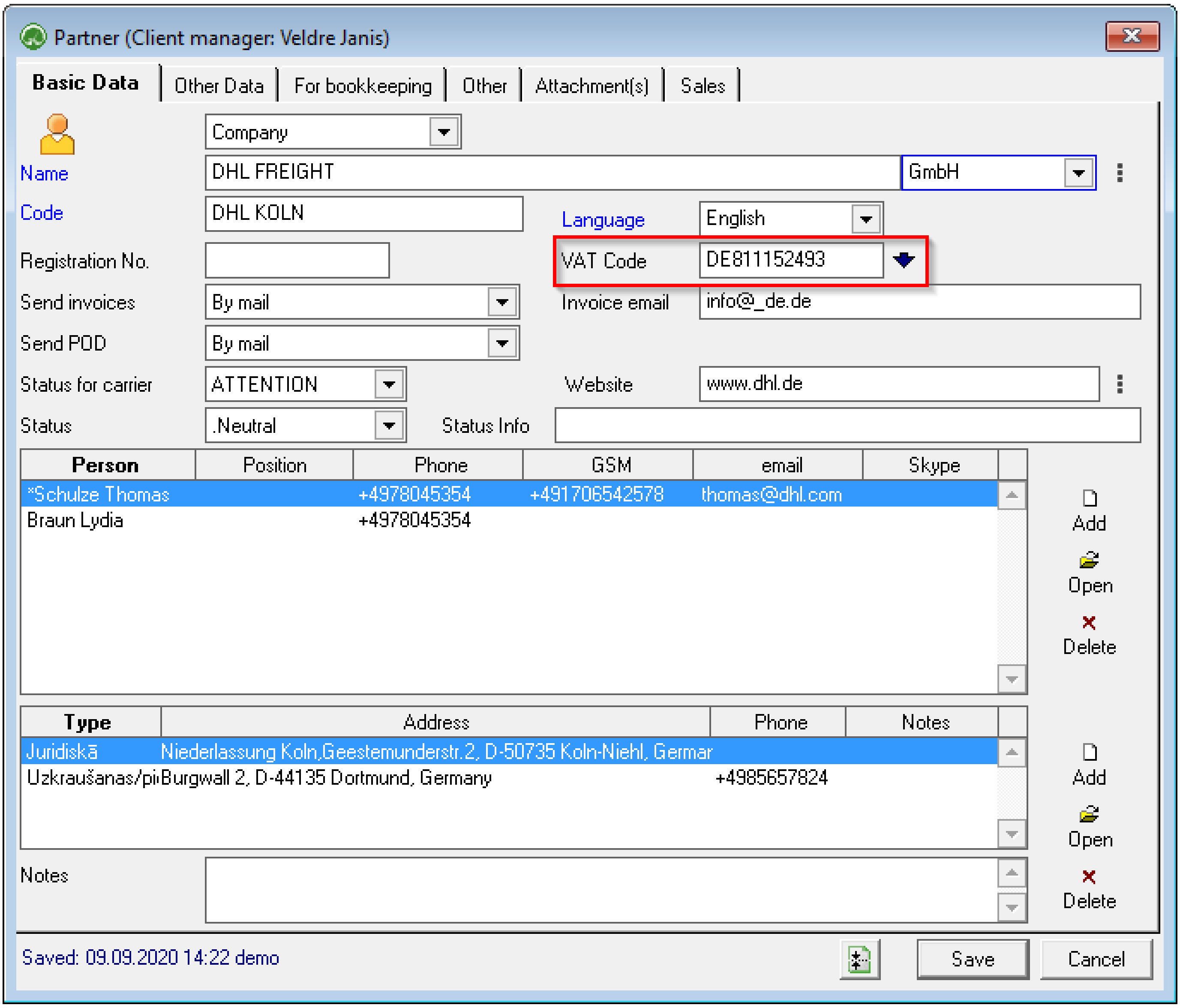
1.	Maximal payment delay	276.00	Days
2.	Average payment delay	1365.00	Days
3.	Average payment days	1379.00	Days
4.	Client order income without invoice	0.00	EUR
5.	Total debt	1113.20	EUR
6.	Overdue payment (2 dokumenti)	1113.20	EUR
7.	Overpayment	0.00	EUR
8.	Credit limit	0.00	EUR
9.	Available limit	-1113.20	EUR
10.	Total income	420.00	EUR
11.	Total expenses	16.67	EUR
12.	Total profit	403.33	EUR
13.	Markup	2419.00	%
14.	Average income per month	420.00	EUR
15.	Average orders count per month	4.00	
16.	Average ldm per month	2.80	ldm
17.	Orders increase	-400.00	%
18.	Total orders count	4	
19.	Last order date	08.12.2020	
20.	Loading regions	D-560, LV-104, LV-301, LV-303	
21.	Delivery regions	LV-30, LV-34, SE	
22.	Last contact		
23.	Next contact		
24.	Unpaid incoming invoices	352.50	EUR
25.	On time unpaid incoming invoices	242.00	EUR
26.	Average delay for incoming invoices	1104.67	Days
27.	Average incoming invoice payment term	840.00	Days

Partner information card

Partner information card

The partner's information card consists of the following sections:

1. Basic data
2. Other data
3. For bookkeeping
4. Other
5. Attachment(s)
6. Sales
7. How to find double partners?
8. Merger of Double Partners



1. Basic data

For European Union companies, **we recommend that you start filling in the VAT code first**, and then click on the blue arrow after the VAT code field to fill in the company name, legal address and company phone number from the EU VAT register

Important! The **legal form of the company** (e.g. SIA or GmbH) is **in a separate field** to limit the formation of duplicate partner entries and to make it easier to search for partners

Language of communication : Language in which OZOLZ TMS will automatically generate documents for correspondence with the Partner (Client order, Transport order, Invoice, Payment reminders, etc.)

There are 3 phone numbers in the partner's basic data : 1) General company's phone number 2) Contact person's phone number 3) Loading or delivery address phone number

Carrier or Customer status: Partner has 6 statuses: 1) Deleted and Do Not Cooperate - the software will not allow to add Customer orders and Transport orders; 2) Poor paying - when adding a Customer order the software warns the user 3) Neutral - default 4) Good paying; 5) Very good

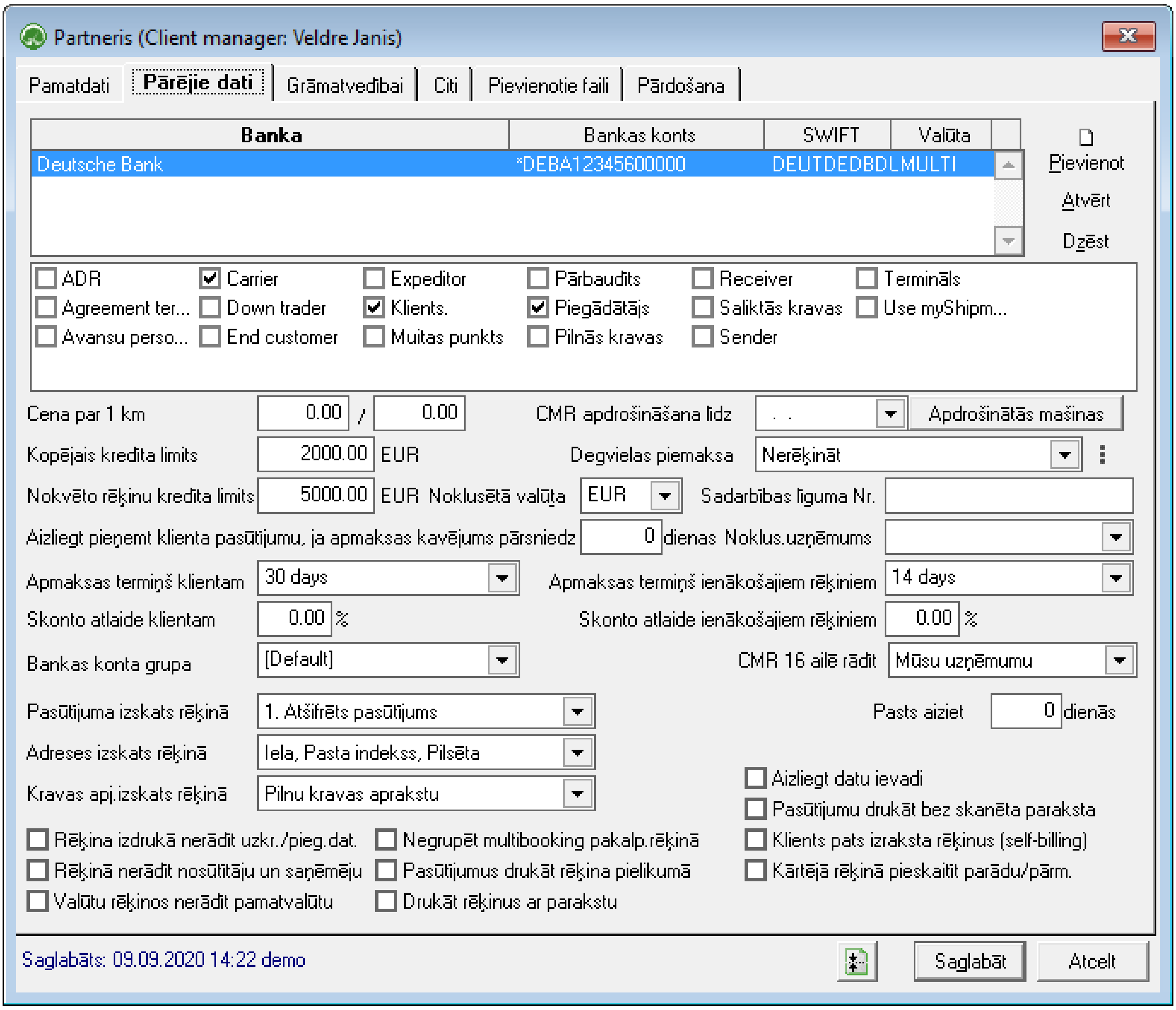
Notes: This field can be used to enter specific information in free text that needs to be taken into account when processing an order or invoicing. If the partner has information in this field, the software will alert it with an exclamation mark in the customer's order.

Contact persons: Add here the contact persons of the Partner with whom you communicate regarding the execution of orders. This information makes it easier to register orders and send emails.

Address: Partners must have the Legal address and postal address attached if they are different. **Delivery** and **loading** addresses added during cooperation will be automatically included in this section of the Partner card.

> When entering an address, we recommend that you search for it and check it on Google Maps. To do this, press the magnifying glass button before the street field in the Address form

2. Other data and Billing configuration



Bank accounts: Bank accounts added here, which can be selected when entering supplier invoices, then imported and paid via internet banking when paying

Partner groups: Mark here the groups to which the partner belongs. If necessary, you can add Partner groups: CRM (Partners) > Lists > Partner groups

Carrier's price per 1km: When entering the carrier's price per 1km, the program itself calculates the freight price if the kilometers traveled in the Voyage/Expedition are filled in

CMR insurance: CMR insurance term can be set in 2 ways. 1) One CMR insurance end date is set for the carrier, if the carrier insures all its cars. 2) CMR insurance is entered for each machine separately, if the carrier does not insure all its machines with one insurance policy.

CMR insurance control: performed before saving the voyage/expedition or in the report Freight > Reports > Expiration

Default Currency: is the default payment currency for the customer's order

Total credit limit: If the customer has specified a credit limit and it has been exceeded, the program can be configured so that before saving the Customer's order, the program warns that the credit limit has been exceeded or prohibits the entry of the Customer's order

Credit limit for overdue invoices: If this limit is exceeded, Ozols will not allow accepting a new order from the customer

Fuel surcharge

Cooperation agreement number: If the field is filled, it will be displayed in the printout of the Customer's order

Prohibit acceptance of a customer's order if the payment is overdue by more than ... days: This function does exactly what it says

Default company - See Working with multiple companies

Customer Payment Due Date: is the default invoice payment due date for customers

Due date for incoming invoices: This information helps you track the payment of incoming invoices

Cash discount for the customer

Cash discount for incoming invoices

Bank account group: If your company has several bank accounts, here is an opportunity to specify which account to present to the client on the invoice.

Appearance of the order in the invoice: In this section it is possible to configure the Order information included in the invoice

Appearance of the address in the invoice: not to show or to show and if to show, then what to show

Appearance of cargo volume in the invoice: not to show or to show and if to show, what to show

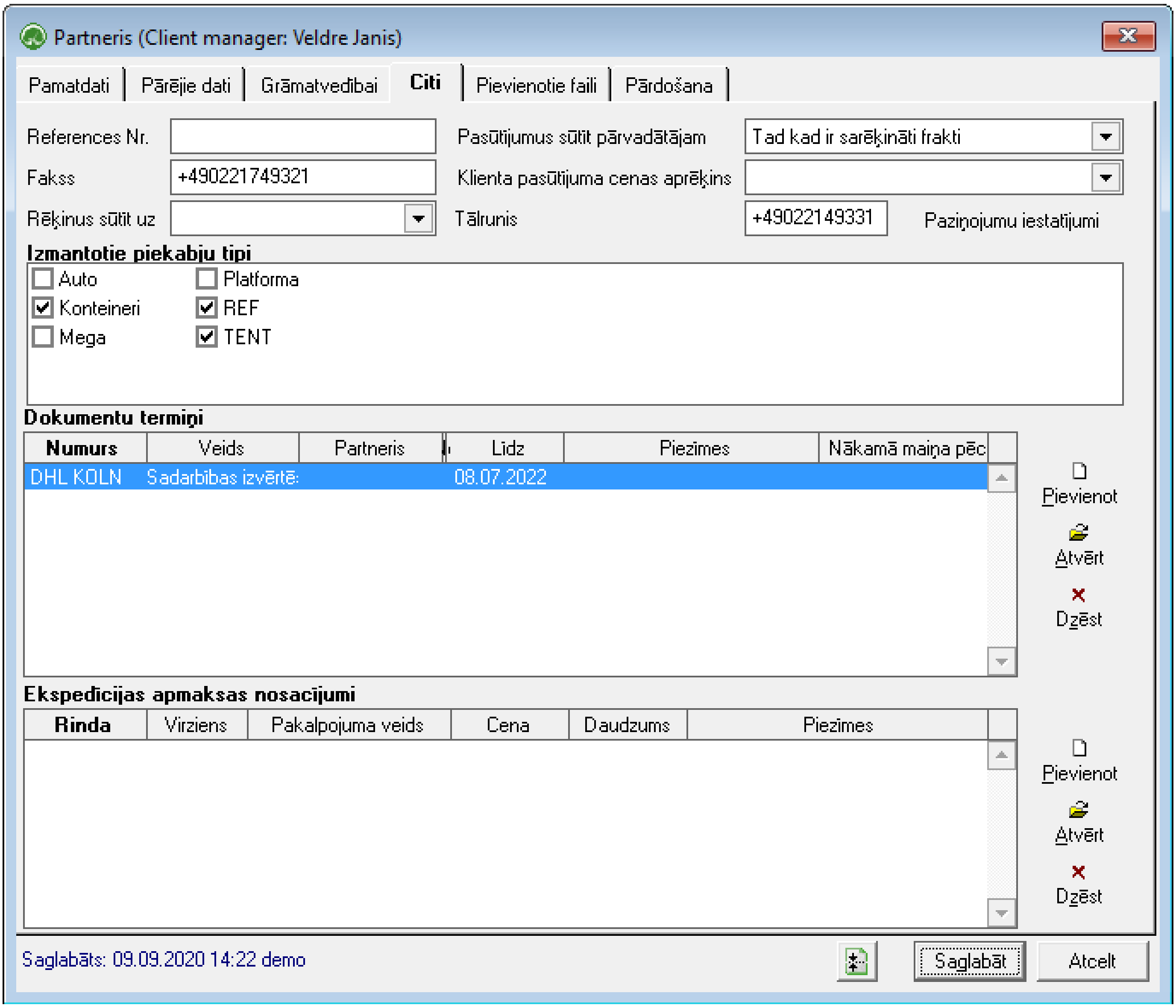
Features that can be turned on and off:

- **Do not show date of delivery in the invoice**
- **Do not show the sender and recipient on the invoice**
- **Do not show base currency in currency invoices**
- **Do not group Multibooking services in the invoice**
- **Print orders in the invoice attachment**
- **Print orders with a signature depending on configuration:**
  1. With scanned manager's signature and company stamp

2. A text "The invoice is prepared electronically and it is valid without a signature"
3. Order printed with space for a signature and stamp to put later manually.

- **Lock data entry**
- **Print the order without a scanned signature**
- **The customer issues the invoices himself (self-billing)**
- **Add debt/overdraft to the current invoice**

3. Other conditions



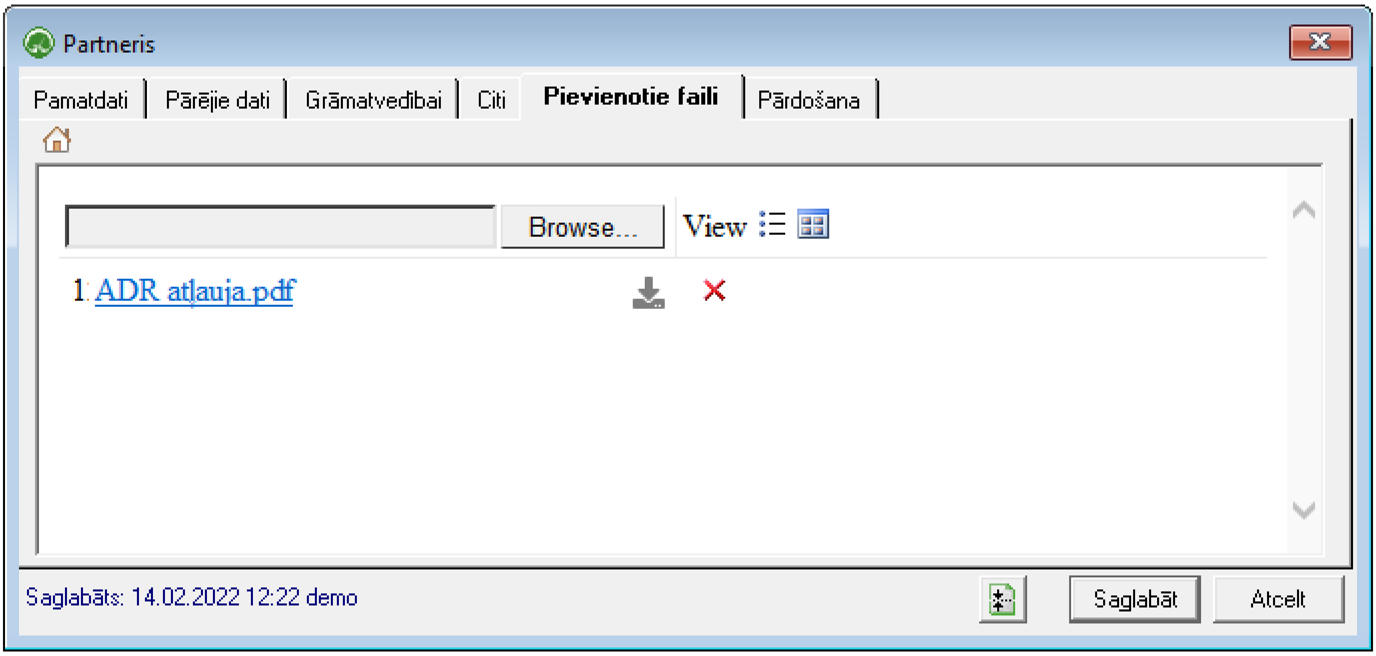
Trailer types: Freight forwarding can be added in the list: Freight transport > Lists > Vhiecle types

Document deadlines: this list includes various carrier and driver deadlines, it is possible to add deadlines. You can add term types in the list: Freight > Lists > Term types

Examples of term types: Driver's license, driver's code 95, driver's medical certificate, driver's professional doctor's certificate, driver's travel insurance, driver's Passport, or ID card

Shipping payment terms: If the Partner is a Carrier on the basis of the contract, in this section it is possible to configure the terms of cooperation.

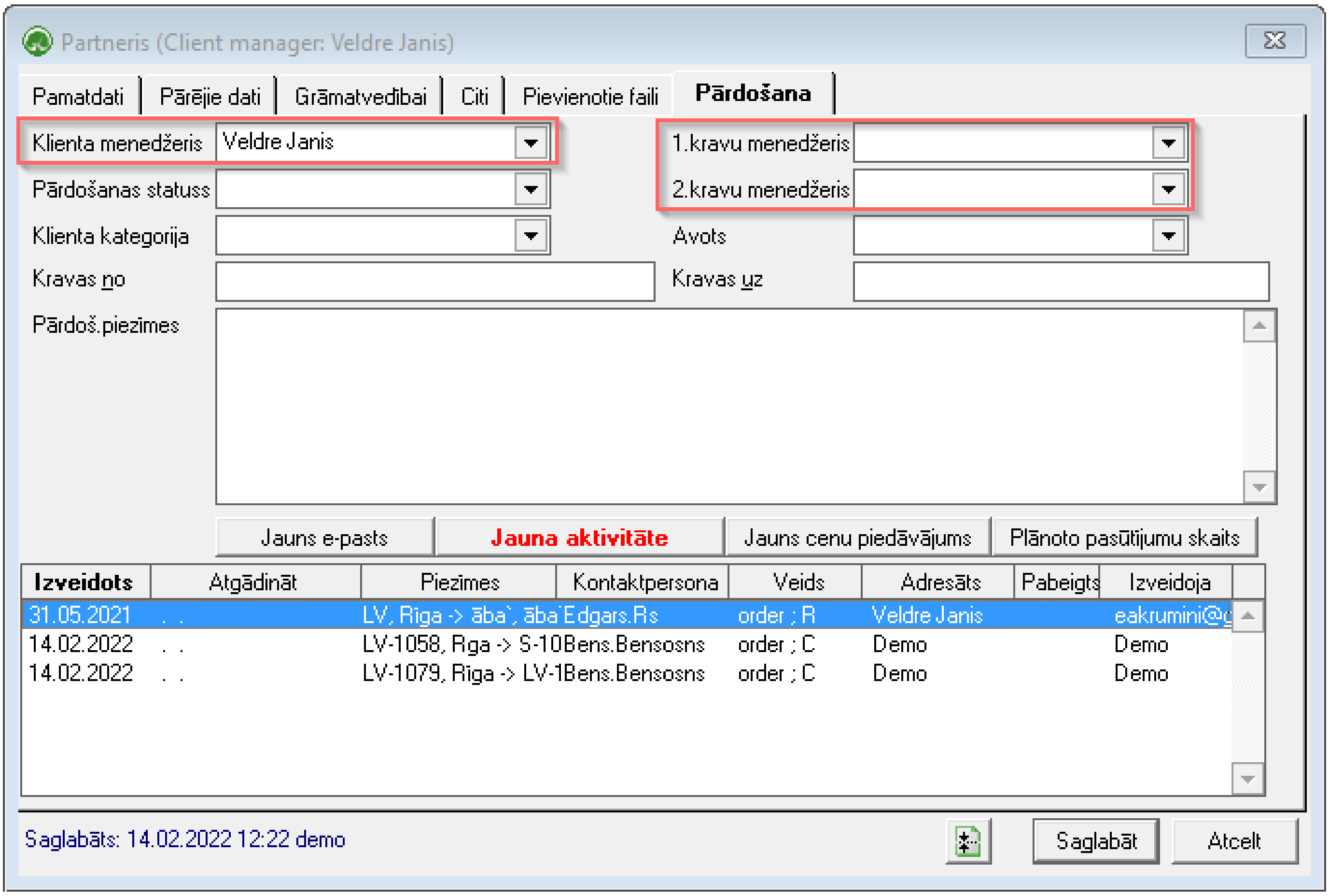
4. Attached files



> In the attached files section, you can add various files to the Partner card . For example, you can add ADR permit, CMR insurance policy, certificates, etc. files to the carrier

If, for example, you have added an ADR permit or CMR insurance to the carrier, then when preparing the Customer's order, you can easily add these documents and send them to the customer.

5. Sale



In this section it is possible to:

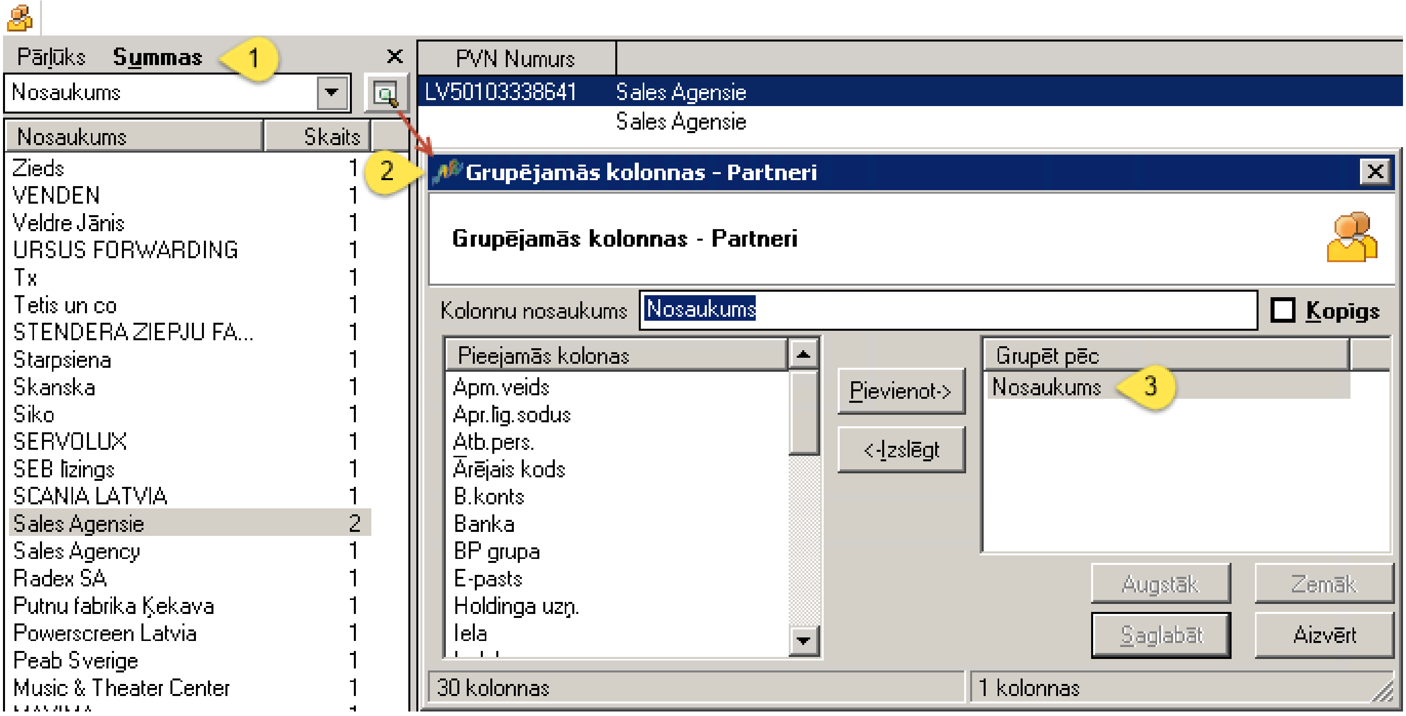
- Add main Manager for Client
- Add two cargo managers
- Specify cargo directions
- Take notes related to the sale
- Send an e-mail to the Partner
- New Activity (CRM) - an easy-to-use customer relationship management system
- New price offer
- Plan the number of orders

6. How to find double partners?

1. Group data by Name or VAT number. How to do it, see: Data grouping

2. If the name of the company is entered twice, then the "Number" column will be greater than 1. Place the mouse cursor on the entry and in the list on the left you will see companies with the same names

3. Sort the data in the list by left and check companies for similar names

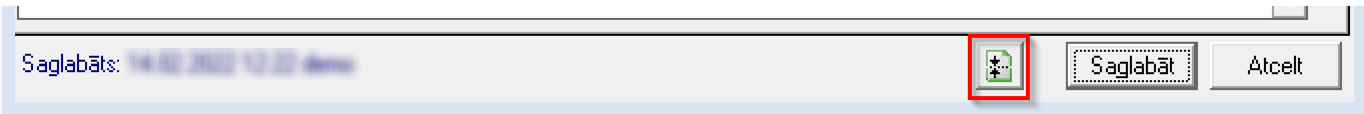


7. Merger of double partners

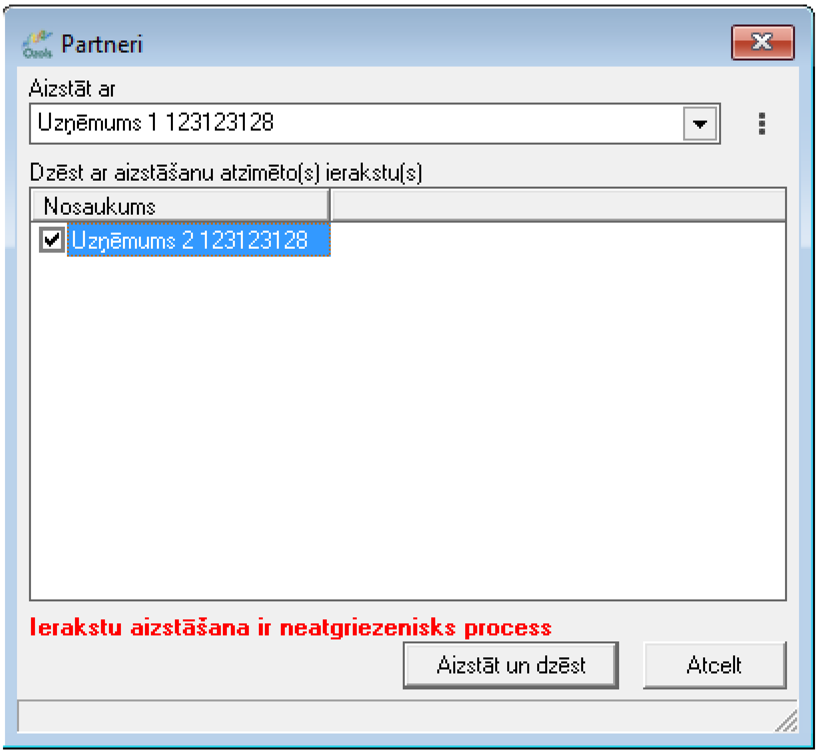
> It is not uncommon for the same company to be entered multiple times. In such a case, the Merger of Partners must be performed.

To combine the data of two companies into one:

1. Both companies must have the same VAT number. This condition is created for security reasons.
2. In the list: CRM (Partners) > Lists > Partners, select Partners to be deleted and press the Del key or open the partner's card and press the command button "Merge partners with deletion"  (it is the command button to the left of the Save command button)



3. Mark the companies to be merged
4. Press the command button "Replace and delete"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