

# 9) Partner Relationship Management (CRM)

- [Who are partners?](#)
- [Partner cooperation summary \(F3\)](#)
- [Partner information card](#)

# 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.

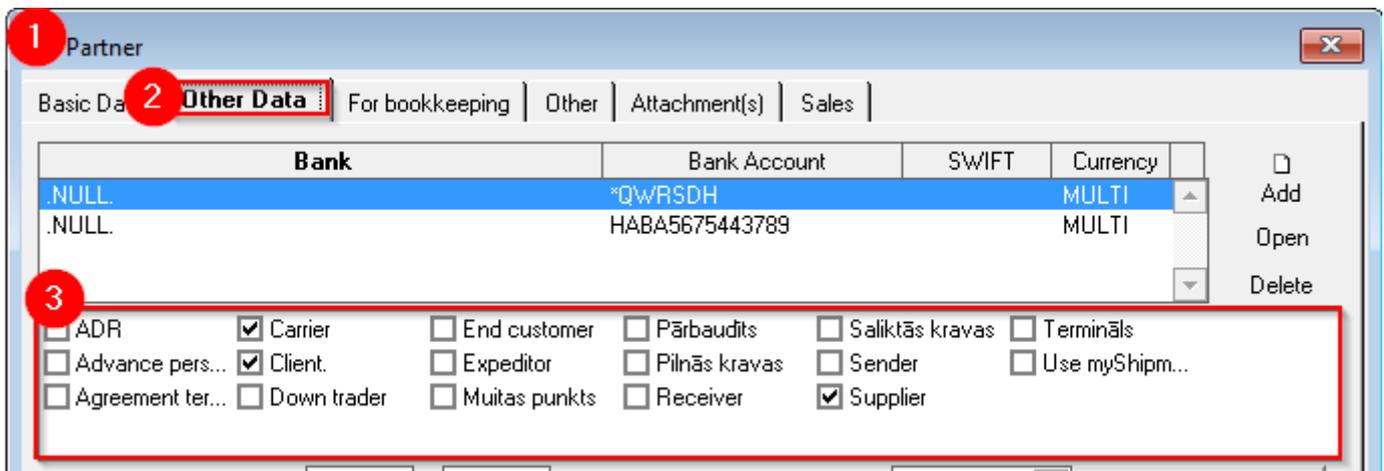
OZOLS TMS automatically divides into the following groups:

<b>Group</b>	<b>In which case OZOLS TMS marks the partner in the group</b>
Approved	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



## Partners info

Search  onfigu SearchPartner Demo  Demo

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 Description
- Contacts
- Outgoing invoices
- Unpaid outgoing invoices
- Unpaid incoming invoices
- Incoming invoices
- Outgoing invoices
- Bank incomings
- Bank expenses
- Cash income
- Cash expenses
- Payment Reminders
- Birthday Calendar
- Partner address printout
- Sent Items
- Client orders
- Trips/Speditions
- Payment Reminders
- New CRM activity
- New price offer

Close

# 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

Partner (Client manager: Veldre Janis)

Basic Data | Other Data | For bookkeeping | Other | Attachment(s) | Sales

Name: DHL FREIGHT GmbH

Code: DHL KOLN

Registration No.:

Send invoices: By mail

Send POD: By mail

Status for carrier: ATTENTION

Status: Neutral

Language: English

VAT Code: DE811152493

Invoice email: info@\_de.de

Website: www.dhl.de

Person	Position	Phone	GSM	email	Skype
*Schulze Thomas		+4978045354	+491706542578	thomas@dhl.com	
Braun Lydia		+4978045354			

Type	Address	Phone	Notes
Juridiskā	Niederlassung Koln,Geestemunderstr.2, D-50735 Koln-Niehl, Gernar		
	Uzkrašanas/piBurgwall 2, D-44135 Dortmund, Germany	+4985657824	

Notes:

Save | Cancel

Saved: 09.09.2020 14:22 demo

## 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

Partneris (Client manager: Veldre Janis)

Pamatdati | **Pārējie dati** | Grāmatvedībai | Citi | Pievienotie faili | Pārdošana

Banka	Bankas konts	SWIFT	Valūta	
Deutsche Bank	*DEBA12345600000	DEUTDEDBDLMULTI		<input type="checkbox"/> Pievienot <input type="checkbox"/> Atvērt <input type="checkbox"/> Dzēst

ADR     Carrier     Expeditor     Pārbaudīts     Receiver     Termināls  
 Agreement ter...     Down trader     Klients.     Piegādātājs     Saliktās kravas     Use myShipm...  
 Avansu perso...     End customer     Muitas punkts     Pilnās kravas     Sender

Cena par 1 km: 0.00 / 0.00    CMR apdrošināšana līdz: ..    Apdrošinātās mašīnas: Apdrošinātās mašīnas  
 Kopējais kredīta limits: 2000.00 EUR    Degvielas piemaksa: Nerēķināt  
 Nokvēto rēķinu kredīta limits: 5000.00 EUR    Noklusētā valūta: EUR    Sadarbības līguma Nr.:  
 Aizliegt pieņemt klienta pasūtījumu, ja apmaksas kavējums pārsniedz: 0 dienas    Noklus.uzņēmums:  
 Apmaksas termiņš klientam: 30 days    Apmaksas termiņš ienākošajiem rēķiniem: 14 days  
 Skonto atlaide klientam: 0.00 %    Skonto atlaide ienākošajiem rēķiniem: 0.00 %  
 Bankas konta grupa: [Default]    CMR 16 ailē rādīt: Mūsu uzņēmumu  
 Pasūtījuma izskats rēķinā: 1. Atšifrēts pasūtījums    Pasts aiziet: 0 dienās  
 Adrešu izskats rēķinā: Iela, Pasta indekss, Pilsēta  
 Kravas apj.izskats rēķinā: Pilnu kravas aprakstu

Rēķina izdrukā nerādīt uzkr./pieg.dat.     Negrupēt multibooking pakalp.rēķinā  
 Rēķinā nerādīt nosūtītāju un saņēmēju     Pasūtījumus drukāt rēķina pielikumā  
 Valūtu rēķinos nerādīt pamatvalūtu     Drukāt rēķinus ar parakstu  
 Aizliegt datu ievadi  
 Pasūtījumu drukāt bez skanēta paraksta  
 Klients pats izraksta rēķinus (self-billing)  
 Kārtējā rēķinā pieskaitīt parādu/pārm.

Saglabāts: 09.09.2020 14:22 demo

**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

Partneris (Client manager: Veldre Janis)

Pamatdati | Pārējie dati | Grāmatvedībai | **Citi** | Pievienotie faili | Pārdošana

References Nr.  Pasūtījumus sūtīt pārvadātājam

Fakss  Klienta pasūtījuma cenas aprēķins

Rēķinus sūtīt uz  Tālrunis  Paziņojumu iestatījumi

**Izmantotie piekabju tipi**

Auto  Platforma  
 Konteineri  REF  
 Mega  TENT

**Dokumentu termiņi**

Numurs	Veids	Partneris	Līdz	Piezīmes	Nākamā maiņa pēc
DHL KOLN	Sadarbības izvērtē:		08.07.2022		

Pievienot  
Atvērt  
Dzēst

**Ekspedīcijas apmaksas nosacījumi**

Rinda	Virziens	Pakalpojuma veids	Cena	Daudzums	Piezīmes
-------	----------	-------------------	------	----------	----------

Pievienot  
Atvērt  
Dzēst

Saglabāts: 09.09.2020 14:22 demo

Saglabāt Atcelt

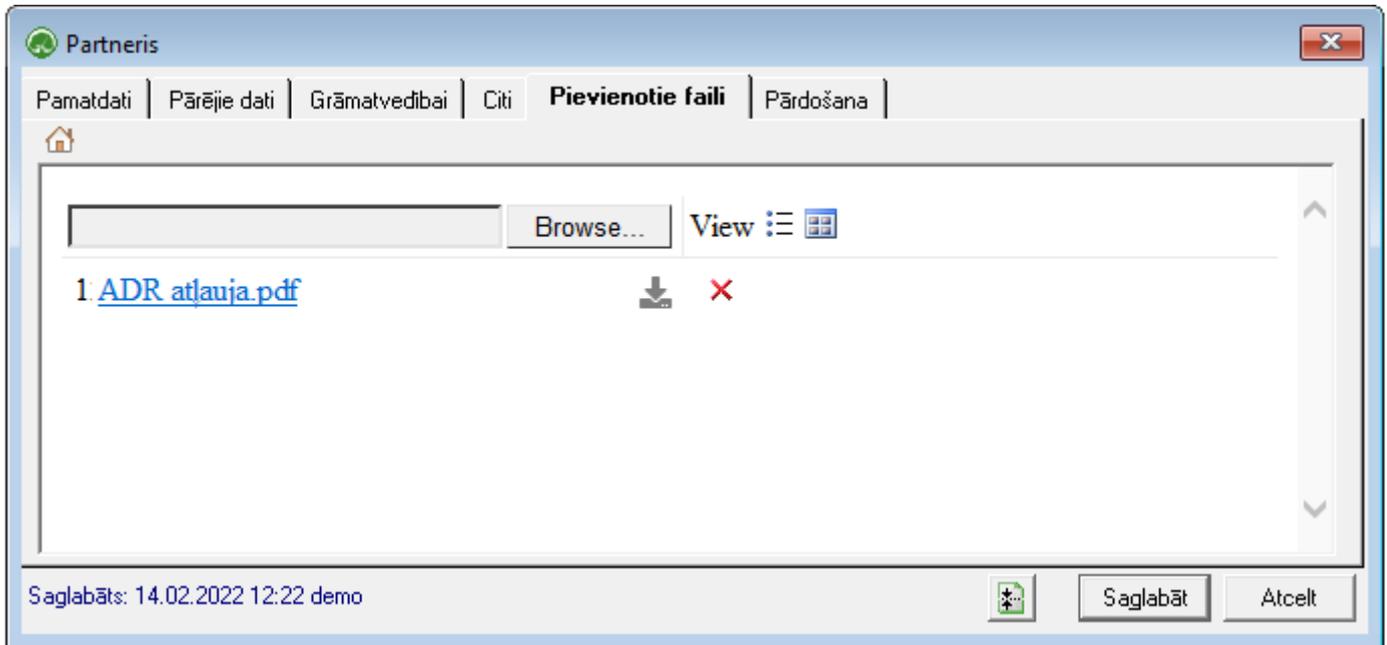
**Trailer types:** Freight forwarding can be added in the list: Freight transport > Lists > Vehicle types

**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

Partneris (Client manager: Veldre Janis)

Pamatdati | Pārējie dati | Grāmatvedībai | Citi | Pievienotie faili | **Pārdošana**

Klienta menedžeris: Veldre Janis

Pārdošanas statuss

Klienta kategorija

Kravas no

Pārdoš.piezīmes

1.kravu menedžeris

2.kravu menedžeris

Avots

Kravas uz

Jauns e-pasts | **Jauna aktivitāte** | Jauns cenu piedāvājums | Plānoto pasūtījumu skaits

Izveidots	Atgādināt	Piezīmes	Kontaktpersona	Veids	Adresāts	Pabeigts	Izveidoja
31.05.2021	..	LV, Rīga -> āba, āba Edgars.Rs		order ; R	Veldre Janis		eakrumini@
14.02.2022	..	LV-1058, Rīga -> S-10Bens.Bensosns		order ; C	Demo		Demo
14.02.2022	..	LV-1079, Rīga -> LV-1Bens.Bensosns		order ; C	Demo		Demo

Saglabāts: 14.02.2022 12:22 demo

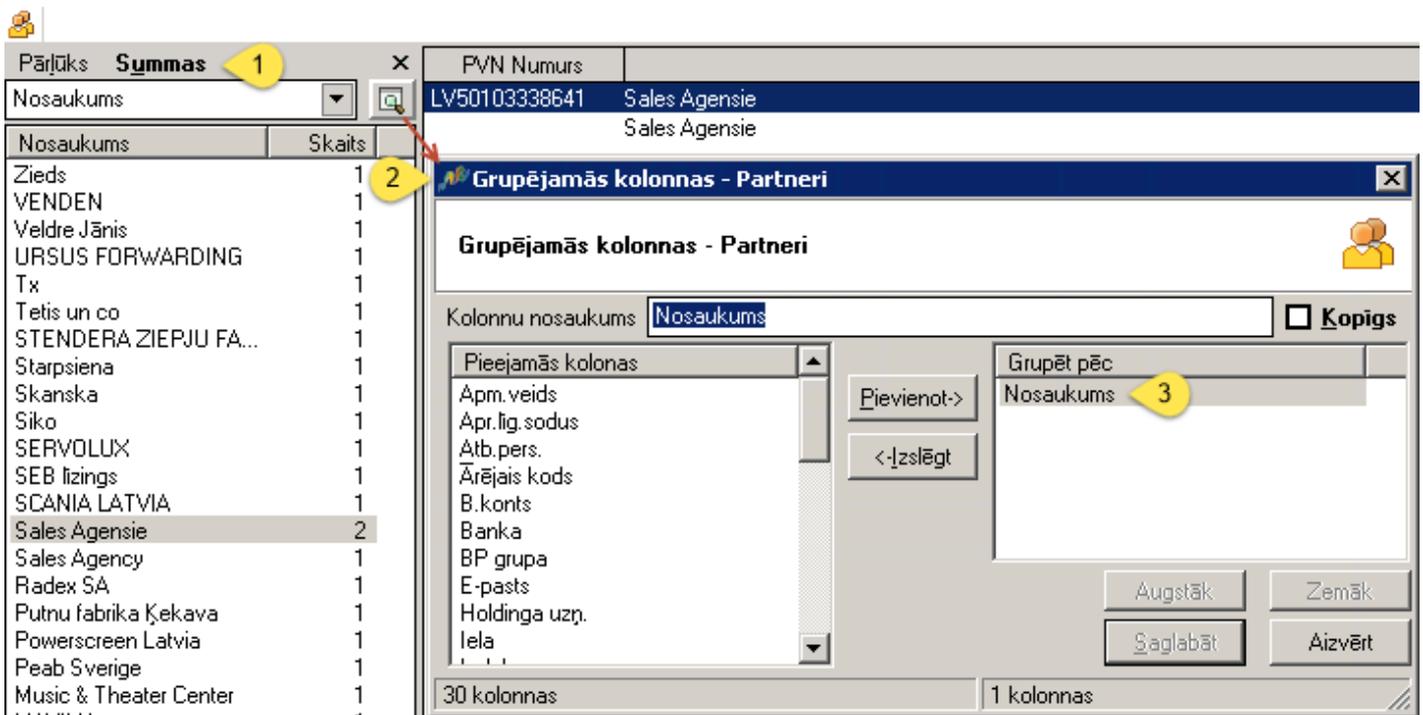
Saglabāt | Atcelt

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"

