

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** Company GmbH

Code DHL KOLN **Language** English




Registration No. **VAT Code** DE811152493 

Send invoices By mail **Invoice email** info@_de.de

Send POD By mail **Website** www.dhl.de




Status for carrier ATTENTION **Status** .Neutral **Status Info**


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

 Add
 Open
 Delete


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

Notes

 Add
 Open
 Delete

Saved: 09.09.2020 14:22 demo  Save Cancel

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	DEUTDEDB33333	EUR

☐ Pievienot
☐ Atvērt
☐ Dzēst

☐ ADR
☐ Agreement ter...
☐ Avansu perso...

☒ Carrier
☐ Down trader
☐ End customer

☐ Expeditors
☒ Klienti
☐ Muiņas punkts

☐ Pārbaudīts
☒ Piegādātājs
☐ Pilnās kravas

☐ Receiver
☐ Saliktās kravas
☐ Sender

☐ Termināls
☐ Use myShipm...

Cena par 1 km: 0.00 / 0.00
 Kopējais kredīta limits: 2000.00 EUR
 Nokvēto rēķinu kredīta limits: 5000.00 EUR
 Aizliegt pieņemt klienta pasūtījumu, ja apmaksas kavējums pārsniedz: 0 dienas
 Apmaksas termiņš klientam: 30 days
 Skonto atlaide klientam: 0.00 %
 Bankas konta grupa: [Default]
 Pasūtījuma izskats rēķinā: 1. Atšifrēts pasūtījums
 Adrešu izskats rēķinā: Iela, Pasta indekss, Pilsēta
 Kravas apj. izskats rēķinā: Pilnu kravas aprakstu

CMR apdrošināšana līdz: ..
 Degvielas piemaksa: Nerēķināt
 Noklusētā valūta: EUR
 Sadarbības līguma Nr.:
 Noklus. uzņēmums:
 Apmaksas termiņš ienākošajiem rēķiniem: 14 days
 Skonto atlaide ienākošajiem rēķiniem: 0.00 %
 CMR 16 ailē rādīt: Mūsu uzņēmumu
 Pasts aiziet: 0 dienās

☐ Rēķina izdrukā nerādīt uzkr./pieg.dat.
☐ Rēķinā nerādīt nosūtītāju un saņēmēju
☐ Valūtu rēķinos nerādīt pamatvalūtu

☐ Negrupēt multibooking pakalp.rēķinā
☐ Pasūtījumus drukāt rēķina pielikumā
☐ Drukāt rēķinus ar parakstu

☐ Aizliegt datu ievadi
☐ Pasūtījumu drukāt bez skanēta paraksta
☐ Klienti pats izraksta rēķinus (self-billing)
☐ Kārtējā rēķinā pieskaitīt parādu/pārm.

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Saglabāt Atcelt

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
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Pievienot
Atvērt
Dzēst

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

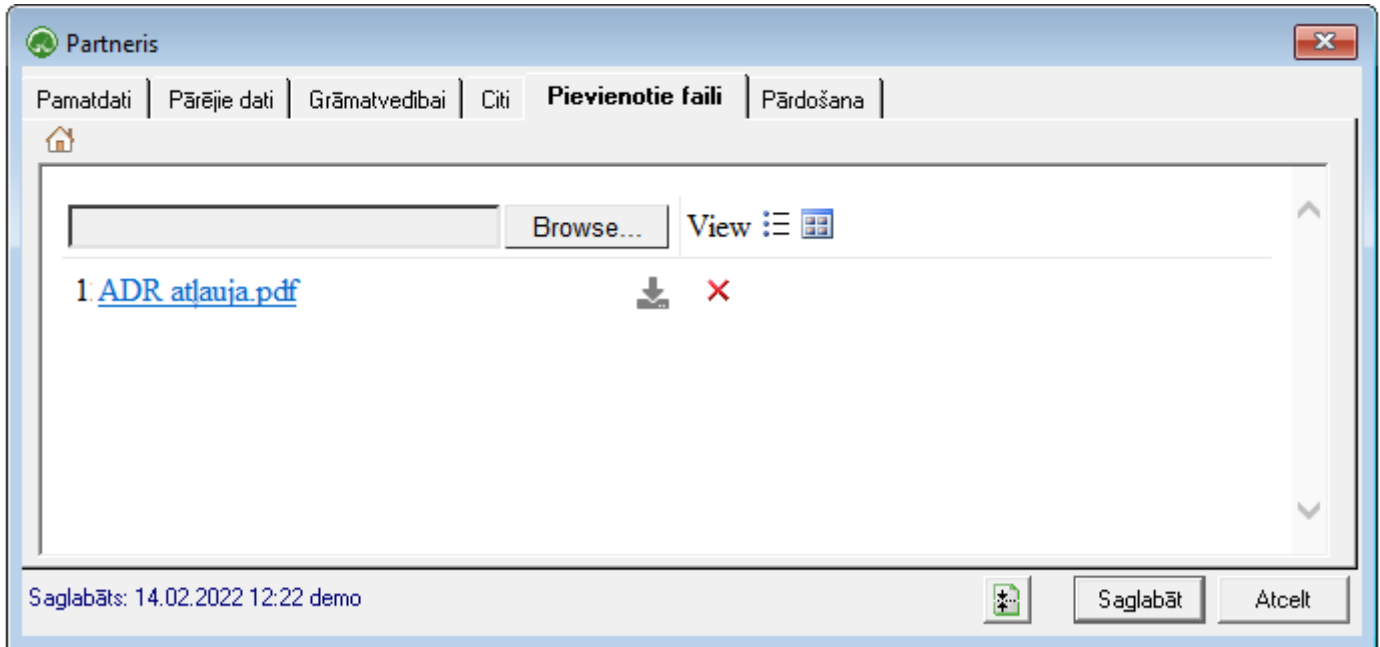
Document deadlines: this list includes various carrier and driver deadlines, it is possible to add deadlines. You can add term types in the list: Freight > Lists > Term types

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.Bensošns		order ; C	Demo		Demo
14.02.2022	..	LV-1079, Rīga -> LV-1Bens.Bensošns		order ; C	Demo		Demo

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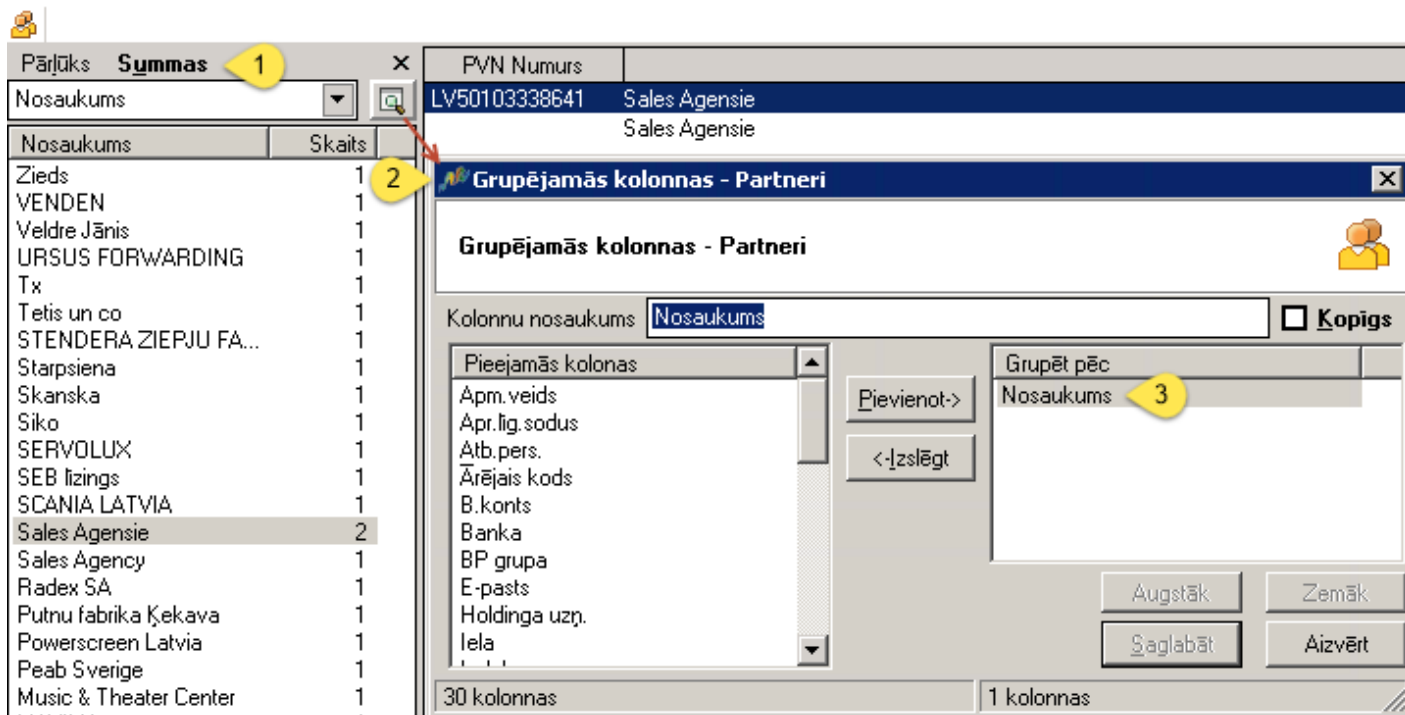
Saglabāt | Atcelt

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

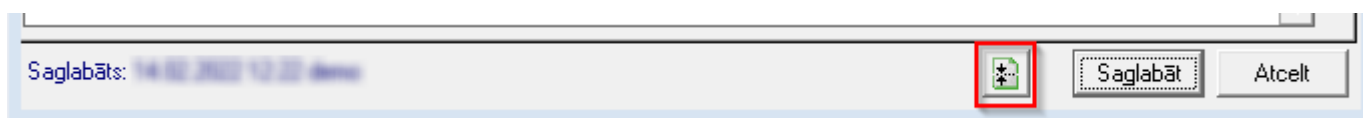


7. Merger of double partners

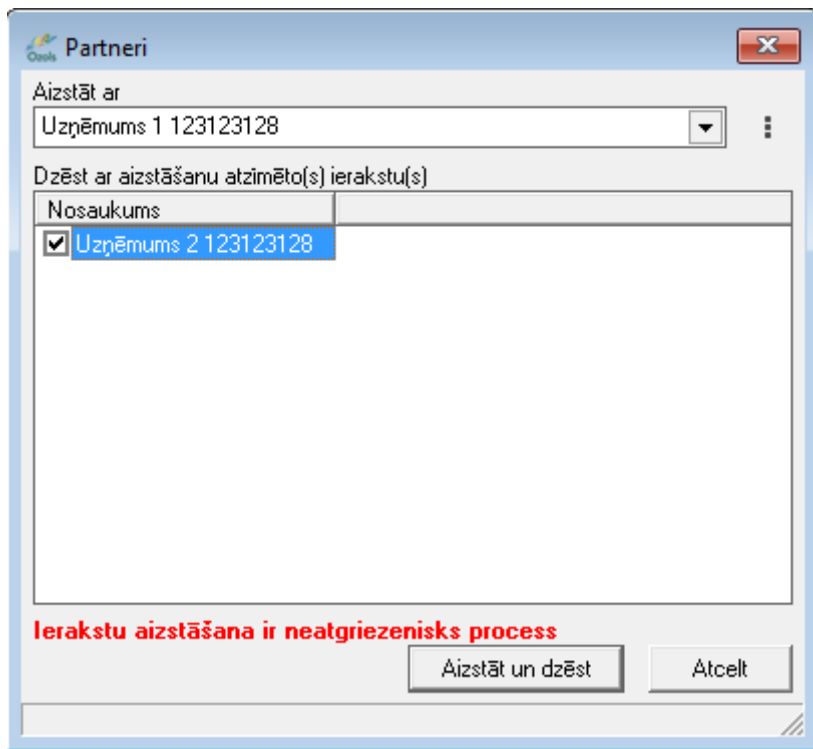
It is not uncommon for the same company to be entered multiple times. In such a case, the Merger of Partners must be performed.

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"



Revision #3

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