M.S. Dynamics CRM for Lilly & Associates Intl.

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Training Manual

6/18/14

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CRM Lead-RFQ-Proposal Process

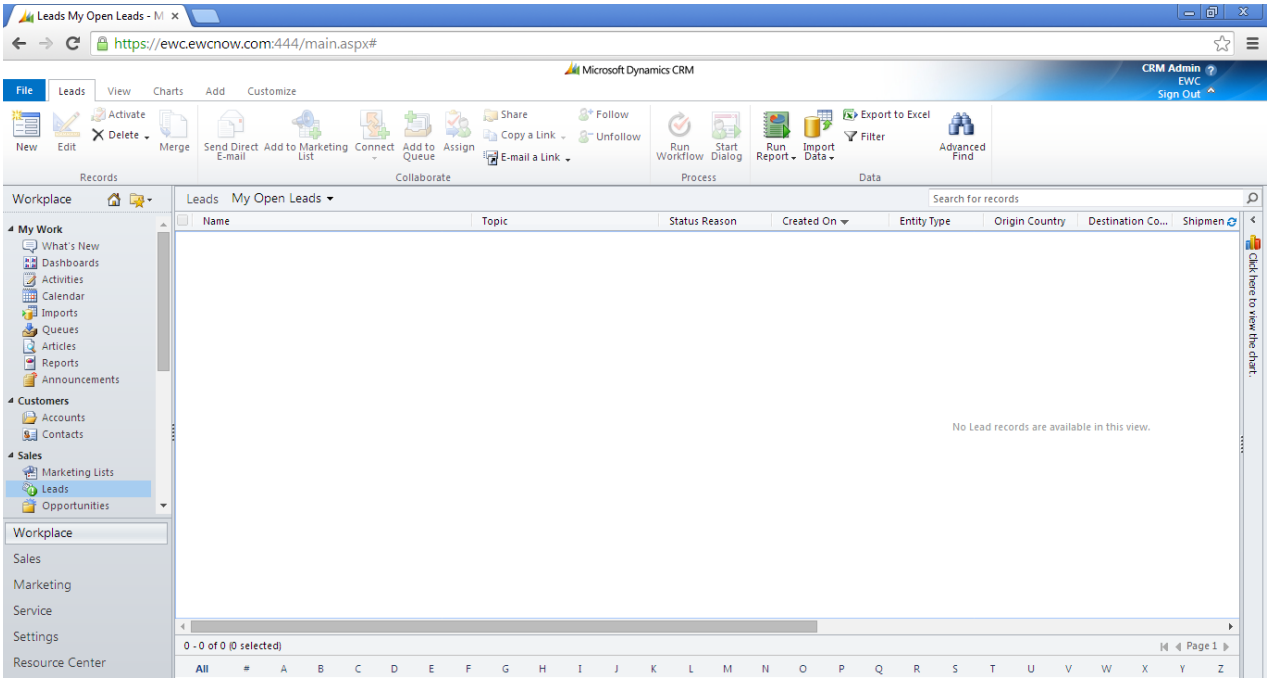
Creating a Lead

The leads can be entered into the CRM system in two ways.

1. Automatically from our website - Prospects/Leads can visit our website and request for a quote and all the data will come over from the website and come in as a lead entity with their shipping request.

2. Manually entered by user – User enters information on the lead entity following the instructions below.

Navigate to the “Leads” menu and click the “New” button on the grid.



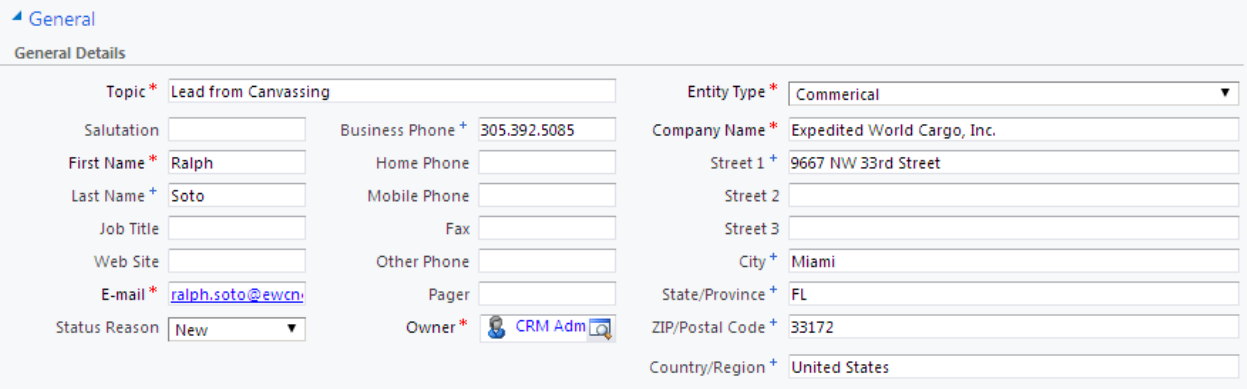
The lead entity window will appear and you can begin entering the information of the lead which include:

- General
- Notes & Activities
- Shipment & Routing Details
- Routes
- Equipment Detail
- Cargo Details
- Other Requirements
- Hazardous & Harmonized Codes
- Special Instructions
- Visit Requests
- Shipping Profile
- Details
- Preferences

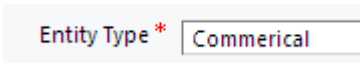
General Tab

General Details

Enter the general information of the lead in the general details section.



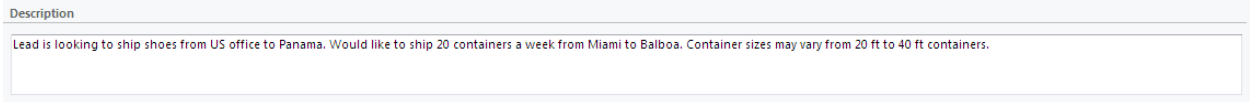
Topic * Lead from Canvassing	Enter a description as how the lead was obtained. You can also use this as a free text area that will help you briefly explain what the leads request is about. Some examples to use are: Lead from Web / Shipping USA to Panama / Lead shipping 20 Containers Lead from Canvassing / Shipping Miami to Balboa / Lead shipping Heavy Equipment Lead from Phone Call / Shipping Door to Door
First Name *	Fields with a red asterisk are required fields and you will not be able to save the lead entity unless a data value exists.
Last Name +	Fields with a blue asterisk are recommended fields and you will be able to save the lead entity. You will not be able to qualify the lead to an account if no data value exists.
Owner * CRM Admin	The lead is assigned to the user located in the Owner field.
Status Reason New	There are currently seven different status reasons. New, contacted, emailed, contact scheduled and visit scheduled are visible on the dropdown. Qualify and Disqualified are triggered by a button event. **STATUS REASON** / **DESCRIPTION** NEW / new lead status CONTACTED / lead has been contacted via phone or in person visit EMAILED / lead has been sent a welcoming email CONTACT SCHEDULED / a phone call has been scheduled as an activity VISIT SCHEDULED / a visit has been scheduled as an activity QUALIFIED / Lead has been qualified DISQUALIFIED / Lead has been disqualified

<table>
<tr>
<td> 
</td>
<td>There are three different entity types. Individual, Commercial and Government.

<table>
<tr><th>ENTITY TYPE</th><th>DESCRIPTION</th></tr>
<tr><td>INDIVIDUAL</td><td>Must enter full name (first, last) of lead.</td></tr>
<tr><td>COMMERCIAL</td><td>Enter company name</td></tr>
<tr><td>GOVERNMENT</td><td>Enter company name</td></tr>
</table>
</td>
</tr>
</table>

Description

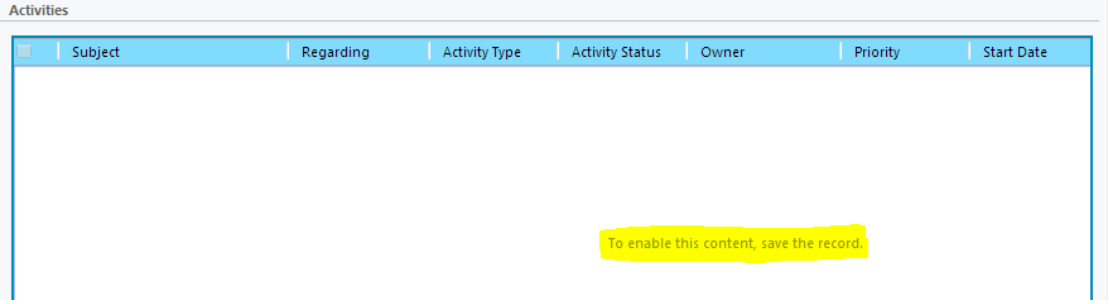
Enter a brief description of the lead and what their needs are in the description box.

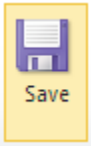


Notes & Activities Tab

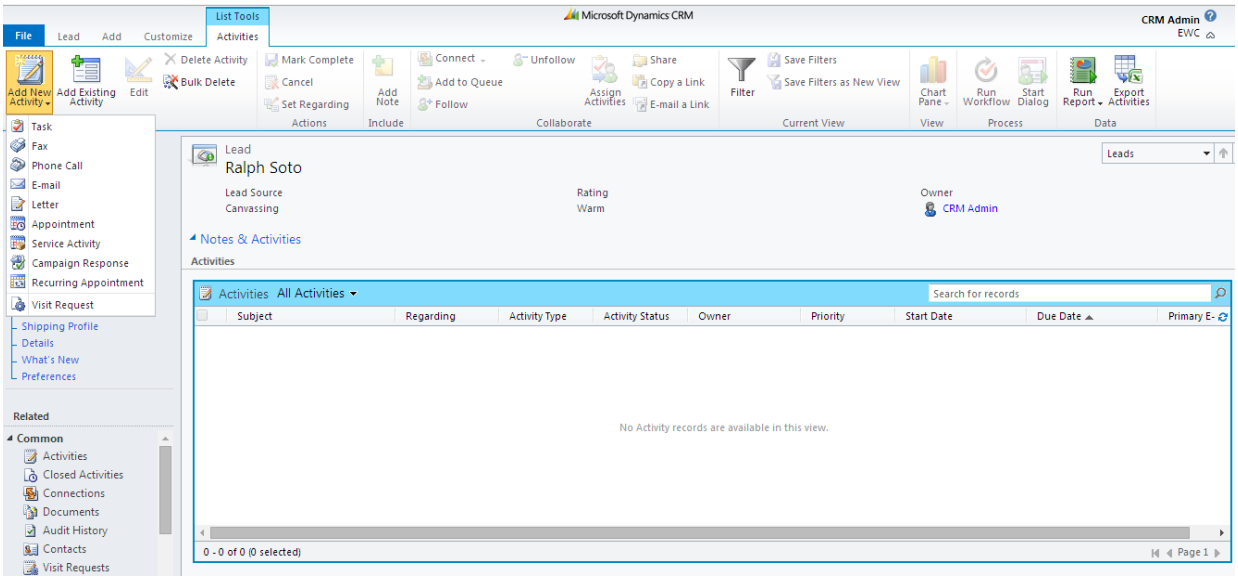
Activities

You will notice that the grid is not enabled. You must save the record in order for all the grids on the entity to become enabled.



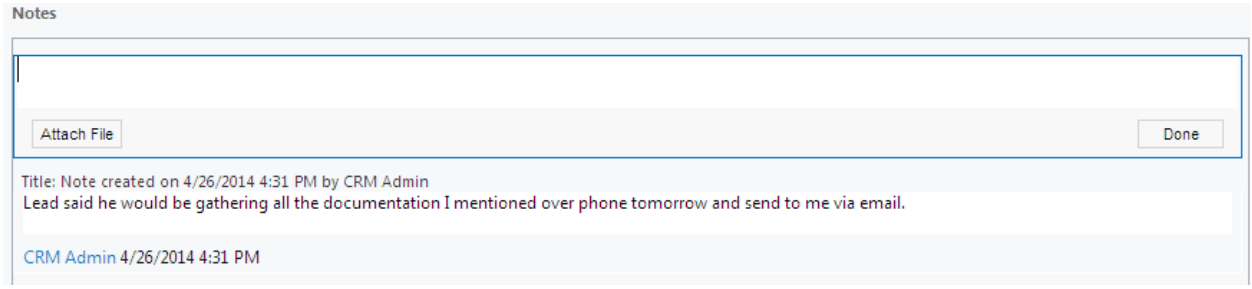
Click the save button 

located on the top left corner of the page in order to activate the grid. Once you have saved the lead entity, then return to the activities grid and select the grid. The grid will become active and a new tab on top will appear “List Tools: Activities”. You can now use any of the buttons on that ribbon to control the activities control. See *Adding New Activities*.

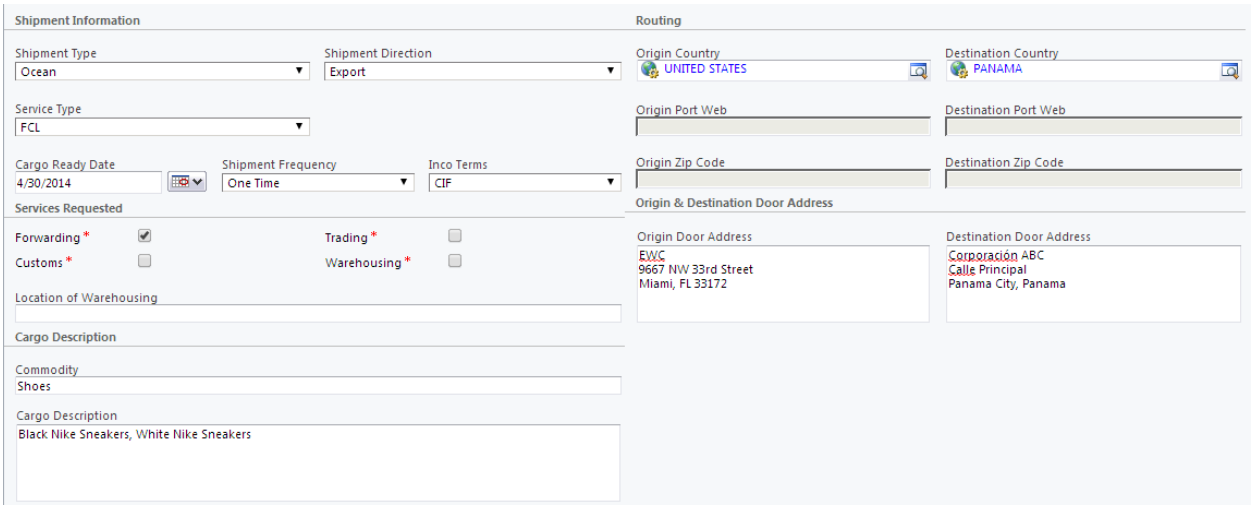


Notes

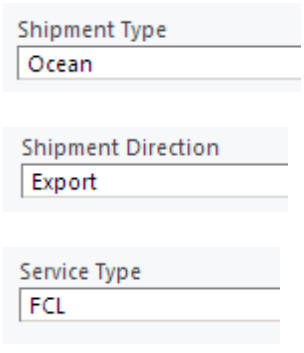
Enter notes related to lead in the notes section box and click on “Done”. The system will stamp the username, date and time to the notes. Additionally, you can attach any file to the notes as well.



Shipment & Routing Detail Tab



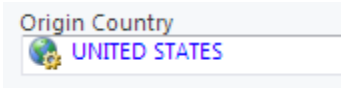
Shipment Information



Enter the shipment type. The service types will pull the options available on from the shipment type you have selected.

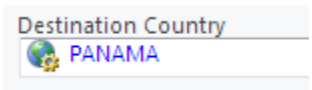
SHIPMENT TYPE	SHIPMENT DIRECTION	SHIPMENT SERVICE TYPE
AIR	Import, Export, Domestic and Foreign to Foreign	Air Loose Cargo, Air Containerized
OCEAN	Import, Export, Domestic and Foreign to Foreign	LCL, FCL and Breakbulk
GROUND	Import, Export, Domestic and Foreign to Foreign	FTL, LTL and Drayage
RAIL	Import, Export, Domestic and Foreign to Foreign	Rail Loose Cargo, Rail Containerized

Routing



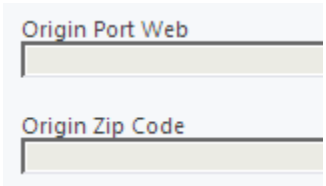
Type in the Origin Country in the field.

You can also click the lookup button to search for a country.

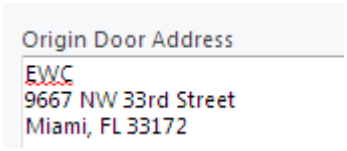


Type in the Destination Country in the field.

You can also click the lookup button to search for a country.

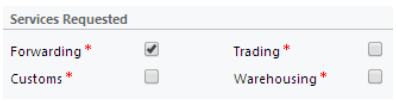


The Origin Port Web, Destination Port Web, Origin Zip Code and Destination Zip code fields are read only. They will only be populated with data if it comes from the web form from our corporate website that the lead has created on their own. We will use the Routes grid to create the multiple routes on the next Route tab.



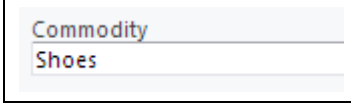
Enter the Origin and/or Destination door address if your moves are door to door, door to port or port to door.

Service Requested

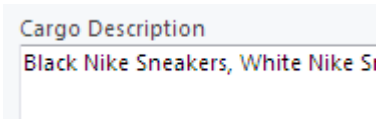


Select from the services available to indicate what type of service the lead is looking for. The services available are forwarding, customs brokering, trading and warehousing.

Cargo Description



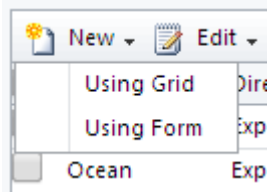
Enter the Commodity of the cargo.

	Cargo description is used to enter further details of the commodity.

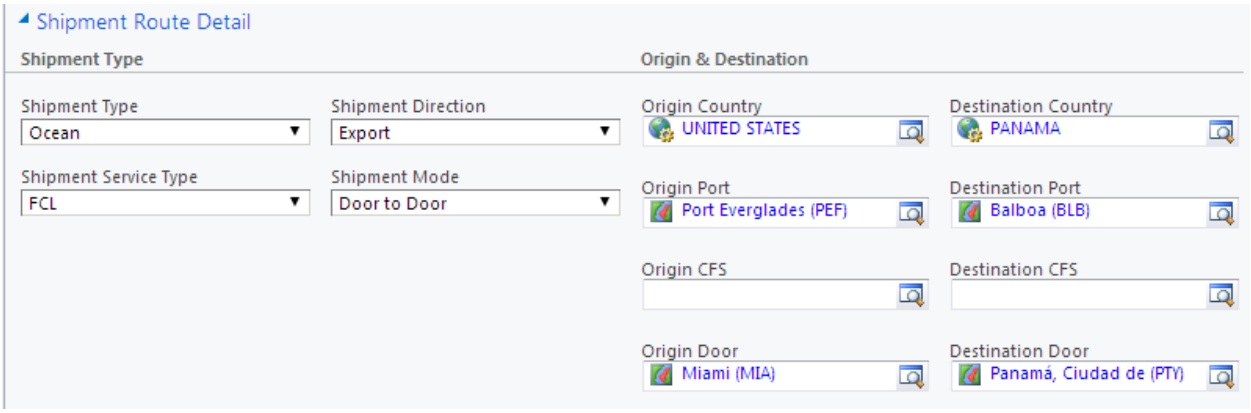
Routes Tab

Routes is used to create the multiple routes the customer wants quoted. Lead may want to ship the following container from origin port Miami to Balboa. Also wants rate from Port Everglades to Balboa.

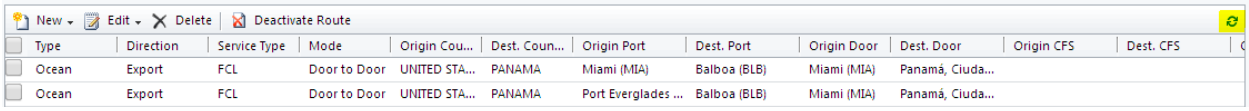
Type	Direction	Service Type	Mode	Origin Country	Dest. Country	Origin Port	Dest. Port	Origin. Door	Dest. Door
Ocean	Export	FCL	Door to Door	United States	Panama	Miami	Balboa	Miami	Panama City
Ocean	Export	FCL	Door to Door	United States	Panama	Port Everglades	Balboa	Miami	Panama City

	You can add a route using the “New” button and select: Using Grid: able to enter the information directly on the grid. Using Form: the route form pops up for you to enter the information of the route.

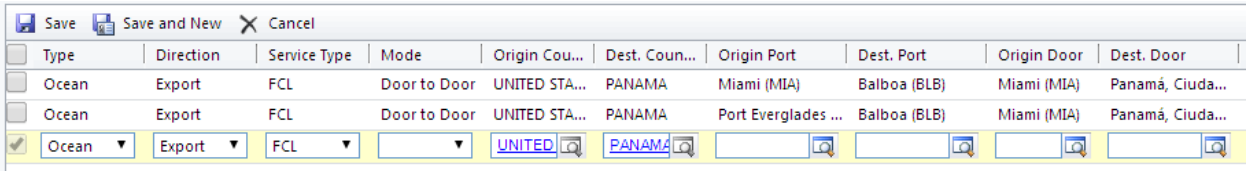
Here is a sample of the “New – Using Form” option for the route.



When using the form option to create a route, make sure to click on the refresh button on the grid in order to view the new record created.



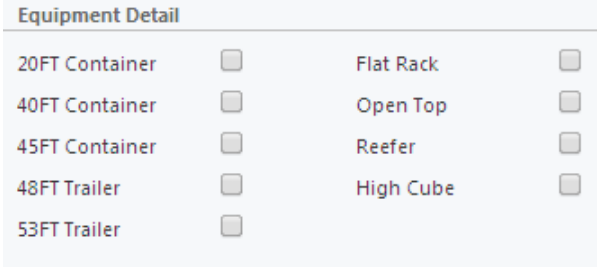
Here is a sample of adding a route using the "New – Using Grid" option.



The Route records are very important on how RFQ's will be created. The Route grid allows users to enter different shipment types, directions and service types. If any of those three data values are different from one another, than a new RFQ will be created when you qualify the lead. See *RFQ created from Routes.*

Equipment Detail

The equipment detail section is used for leads that do not have a total quantity of containers they want to ship. They are just looking for a price sheet that shows what our rate is for the different container sizes to the route locations they have requested.

	Click on any of the check boxes to indicate what size and type of container the leads needs a price sheet for.

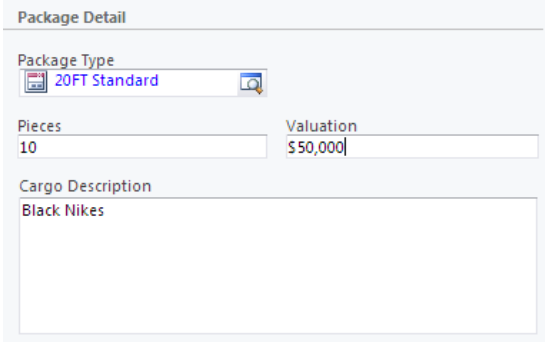
Cargo Detail Tab

The cargo detail section allows you to enter cargo information which includes pieces, cargo description, length, width, height, weight, volume etc… If the lead has the quantity of containers they are going to ship, then you need to use the cargo detail section instead of the equipment section.

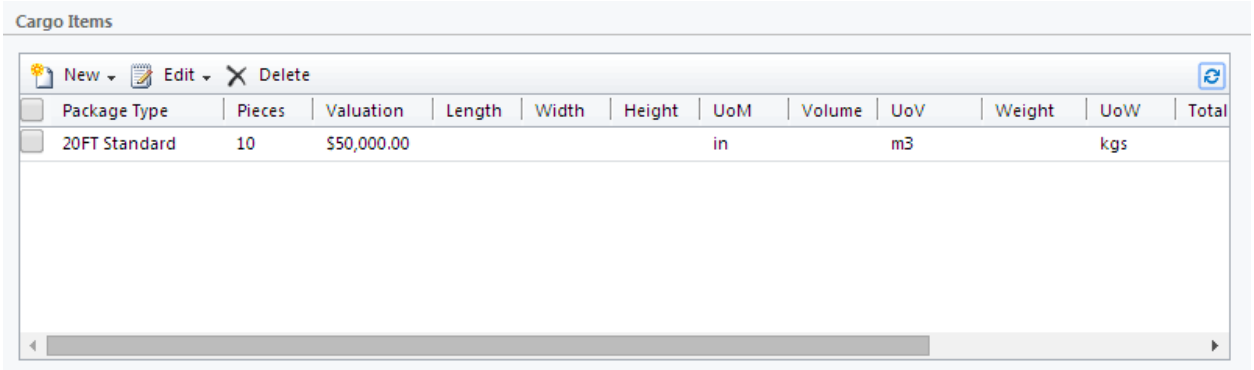
Adding a Cargo Item – (Container)

Select the "New" button on the cargo item grid and select using form.

Enter the following detail and click save.



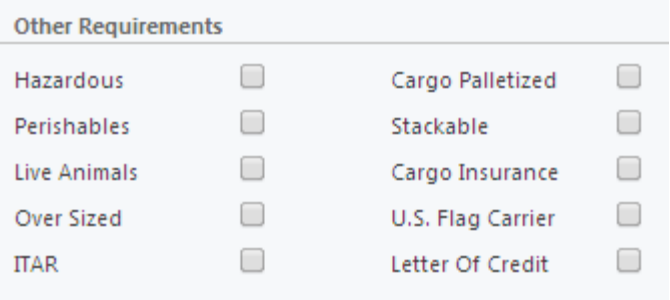
The Cargo Item grid will display the record as shown below. Make sure to click the refresh button on the grid to display record.



Other Requirements Tab

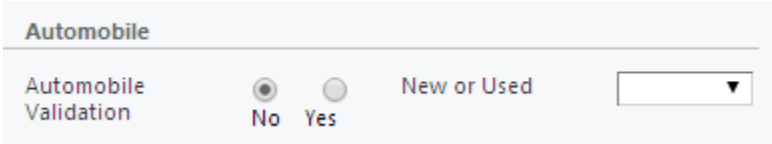
Other Requirements

The Other Requirements section allows to further describe the type of cargo and requirements.

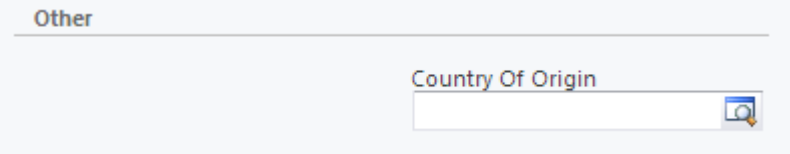


Automobile

The Automobile section is information related for automobile shipments.

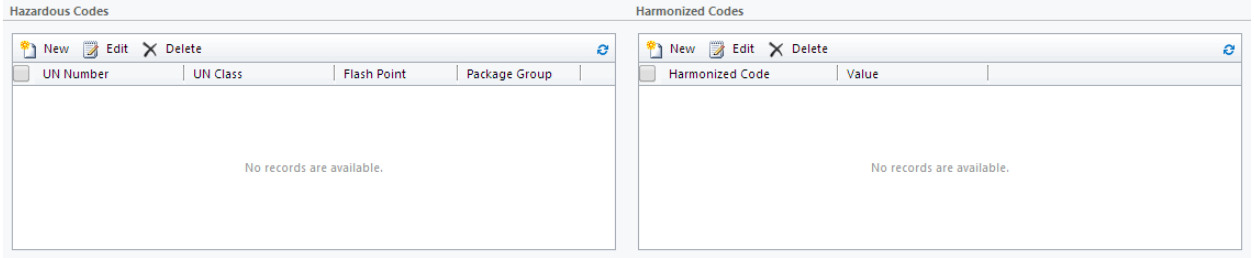


Other



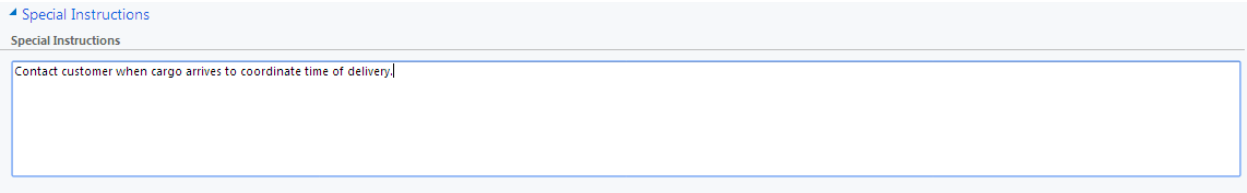
Hazardous & Harmonized Codes Tab

Enter the Hazardous and Harmonized data as needed. Select “New” on either grid and enter the data on the grid.



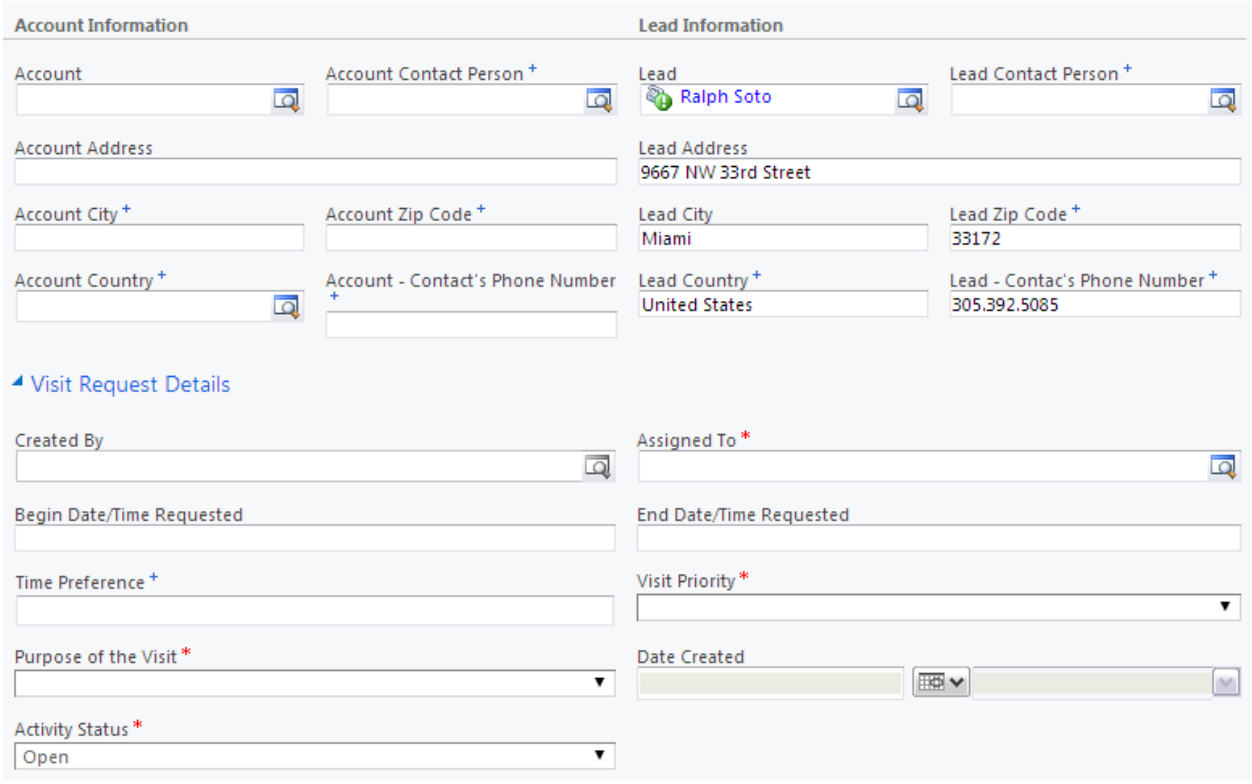
Special Instructions Tab

Enter special instruction related the shipment request.



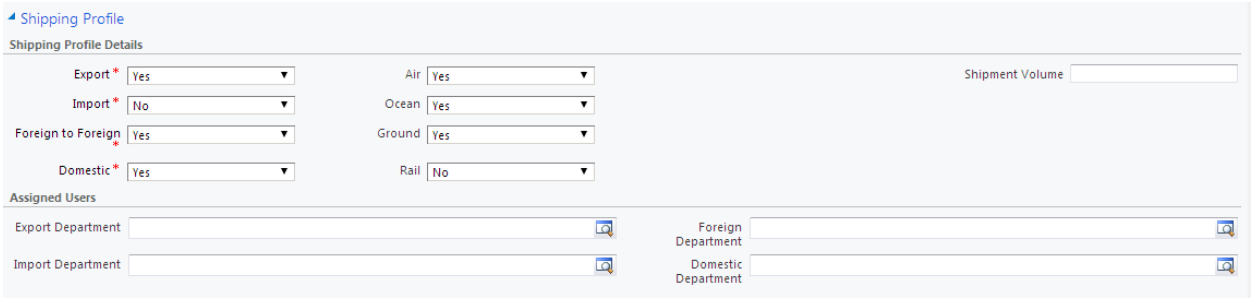
Visit Request Tab

The visit request is used for a sales person that is sending the request to a sales support user to coordinate a visit for that sales person. It can be used for both a lead or an account.



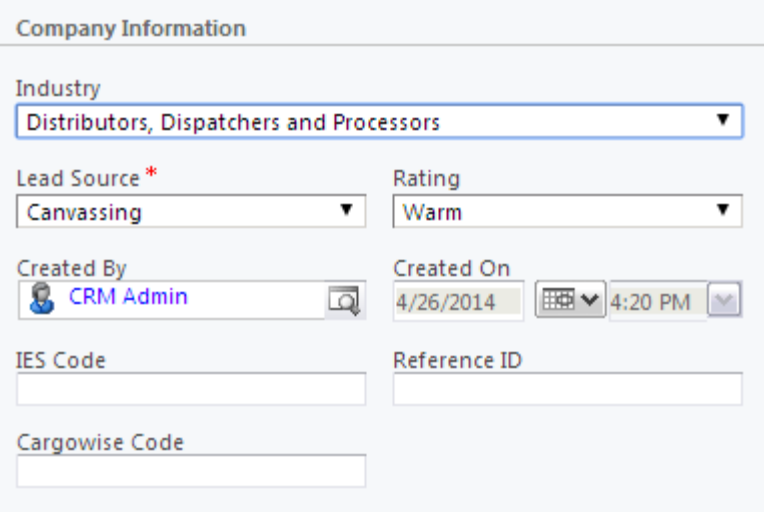
Shipping Profile Tab

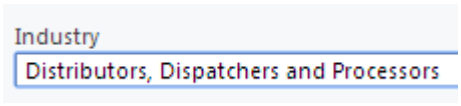
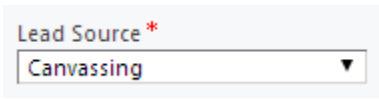
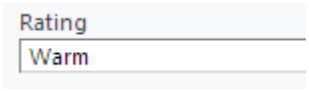
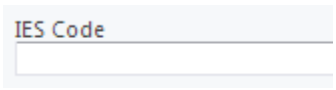
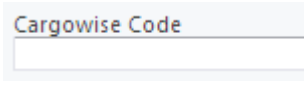
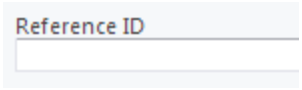
The shipping profile section is used to capture the shipping patterns of the lead. Do they do exports, imports… air, ocean… Assigned users is used to assign the user from a department to the lead.



Details Tab

Company Info

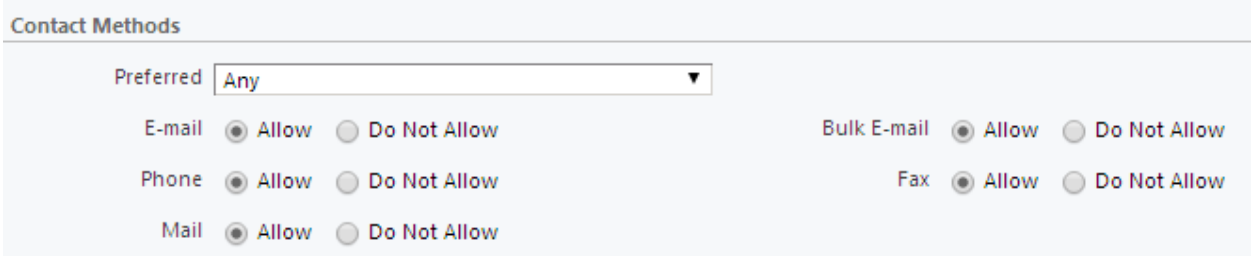


	Industry – Select from the list of industries the lead belongs to.
	Lead Source – Select from the list how the lead was generated.
	Rating – Select Hot, Warm or Cold to indicate what the sales stage is for this lead.
	IES Account number
	Cargowise Account Number
	Reference ID – Used when importing a data set of leads and a reference id is assigned to each lead.

Preferences Tab

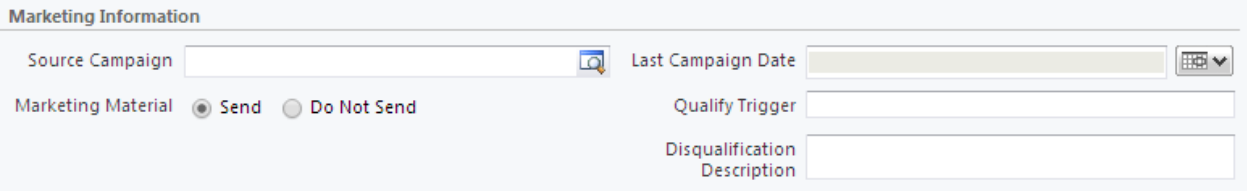
Contact Info

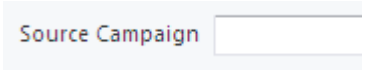
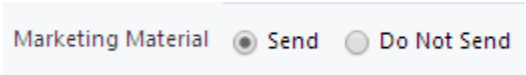
Indicate the preference of communication the lead would like for us to use.



Marketing Material

The marketing information section is used to assign campaigns to the lead. This shows what campaign was used to generate the lead.



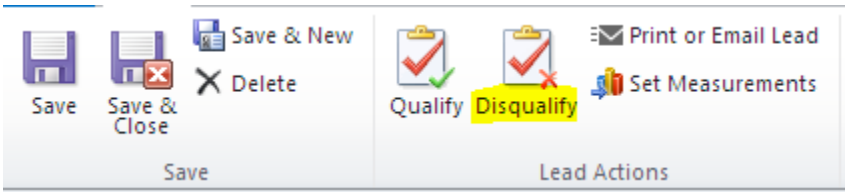
	The source campaign is used to register how the lead was generated. Example of campaigns are: Mailers Email Ad (assign reference ID to Ad) Trade Show – Each trade show is considered a campaign.
	By indicating if the lead can receive marketing material, will help the marketing department make sure when email blasts of promotions are made, it is only for those that want marketing material.

Once you have entered all the information, then you can save the record by clicking the save and close button.

Disqualify Lead

Disqualifying the Lead

If you have determined that the lead needs to be disqualified, click the “Disqualify” button and a pop up appears.

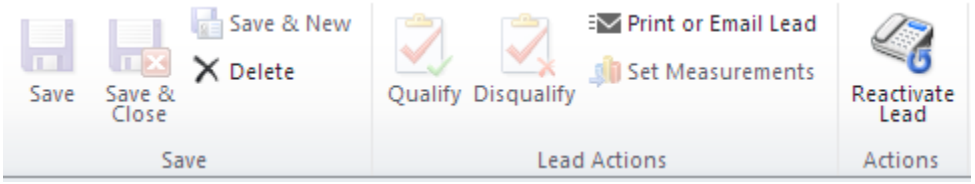


The disqualify popup requires you to select the type of disqualification and the reason for disqualifying.

When you click OK, the lead will become read only and the status reason will become disqualified. The lead will no longer appear as an open lead on your lead grid view since it has been finalize.

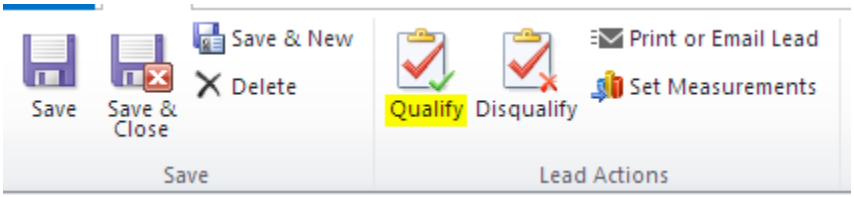
Reactivate Lead

Once disqualified, you can re-activate the lead by selecting the Re-activate lead button



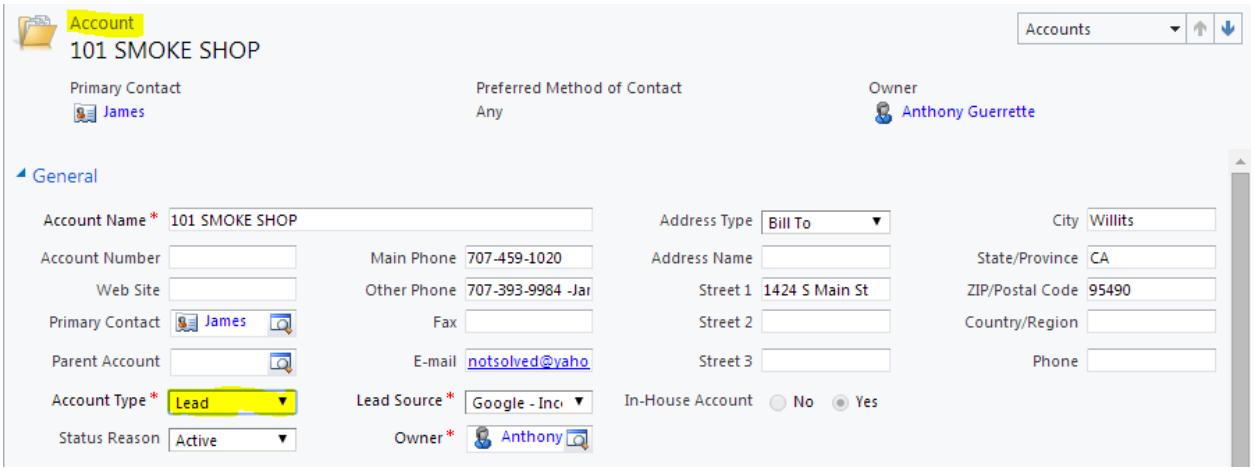
Qualifying Lead

Return to the lead that you just entered. If you have all the information required to create the RFQ, then you can qualify the lead. To qualify the lead, click on the qualify button on the ribbon menu on the lead.



[Embed Visio Image of Lead Qualify Workflow]

Once the lead has been qualified, the lead entity record becomes read only and an account is created with the data that was originally entered on the lead. The Account is now the active record and has a status of “Lead”.



Creating an RFQ from a Lead

When you qualify a lead, four operations happen in the background.

1. An Account is created with account type “Lead”.
2. A Contact is created and attached to the Account. It is also used as the primary contact in the account.
3. An Opportunity is created
4. One or more RFQ’s are created and attached the opportunity.

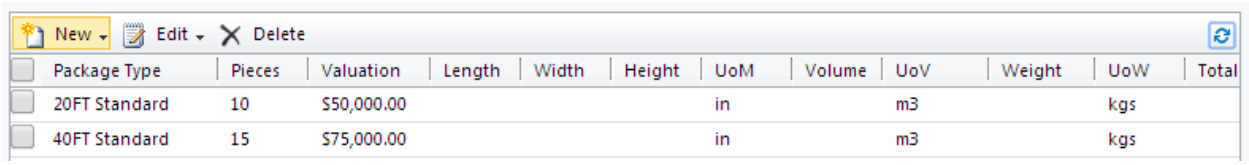
How RFQ’s are created from Routes in a Lead

The routes grid in the lead entity allows you to enter multiple routes. You should follow these rules when entering routes inside of a lead.

1. Stick to one cargo type (Loose Cargo or Container). If you need to do two quotes related to container and loose cargo, start with one type and when you qualify a lead and the RFQ is created, you can create another RFQ within the opportunity for the other type.

2. Cargo Detail entry – Same applies when entering cargo detail. Only stick to one type of cargo loose cargo or containerized.

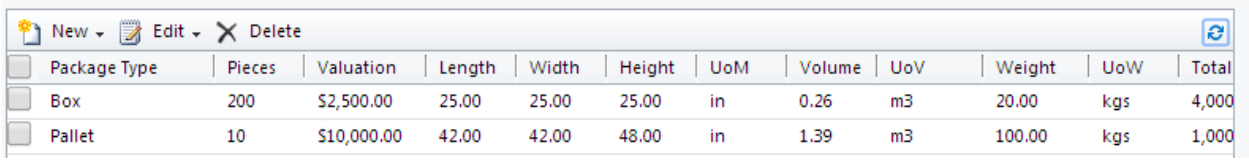
Entering containers only on the cargo detail grid.



New Edit Delete

Package Type	Pieces	Valuation	Length	Width	Height	UoM	Volume	UoV	Weight	UoW	Total
20FT Standard	10	$50,000.00				in		m3		kgs	
40FT Standard	15	$75,000.00				in		m3		kgs	

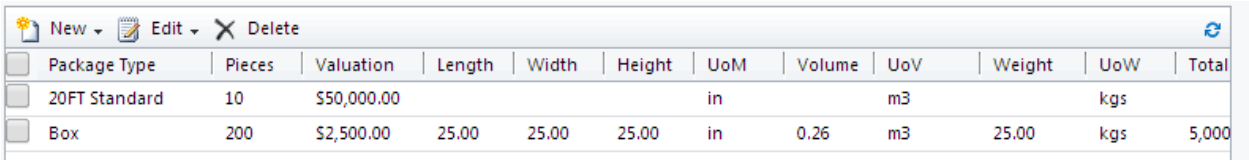
Entering loose cargo on the cargo detail grid.



New Edit Delete

Package Type	Pieces	Valuation	Length	Width	Height	UoM	Volume	UoV	Weight	UoW	Total
Box	200	$2,500.00	25.00	25.00	25.00	in	0.26	m3	20.00	kgs	4,000
Pallet	10	$10,000.00	42.00	42.00	48.00	in	1.39	m3	100.00	kgs	1,000

*What not to do – Entering containers combined with loose cargo

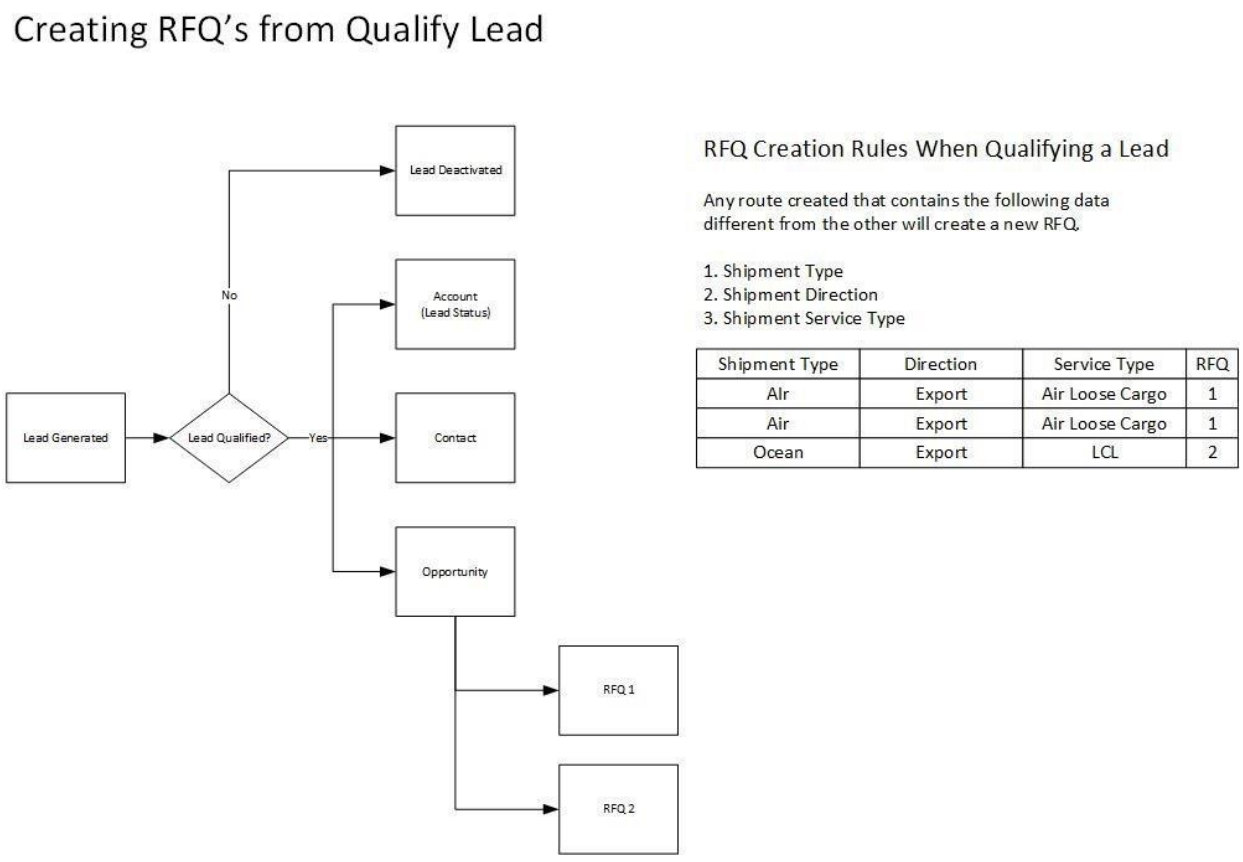


New Edit Delete

Package Type	Pieces	Valuation	Length	Width	Height	UoM	Volume	UoV	Weight	UoW	Total
20FT Standard	10	$50,000.00				in		m3		kgs	
Box	200	$2,500.00	25.00	25.00	25.00	in	0.26	m3	25.00	kgs	5,000

Creating Multiple RFQ's from Routes in a Lead

RFQ's can be created when a lead is qualified. The system looks at the number of routes inside of a lead. It is also looking for shipment type, shipment direction and shipment service type. If any of those pieces of data is different, a separate RFQ will be created.



Shipment Type	Direction	Service Type	RFQ
Air	Export	Air Loose Cargo	1
Air	Export	Air Loose Cargo	1
Ocean	Export	LCL	2

Creating an Opportunity

The opportunity entity is where the sales person is going to manage the multiple RFQ's created for one shipment. Only one shipment request should be managed by an opportunity. The multiple RFQ's are nested inside of an opportunity. Opportunities can be closed by Won/Lost status.

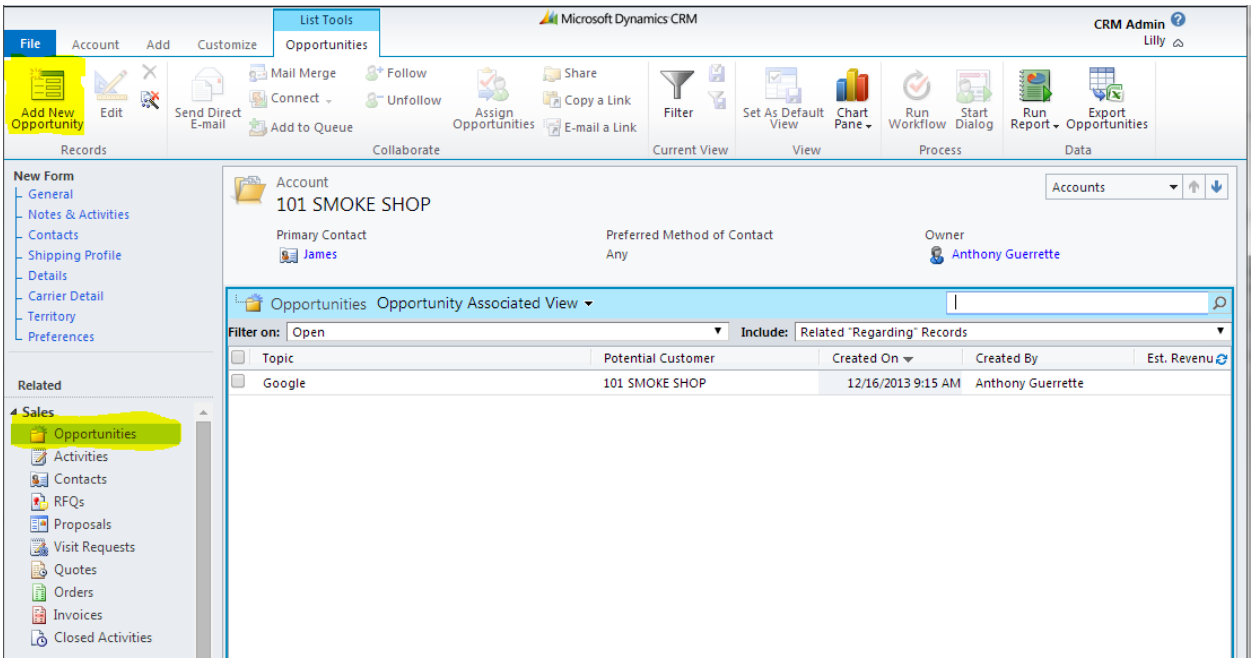
Opportunity Statuses

The opportunity has statuses that close the opportunity.

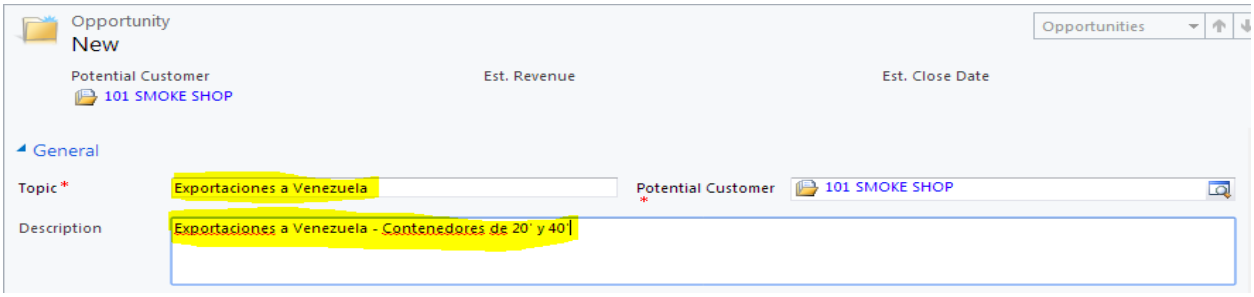
In Progress	Opportunity has been opened and it is in progress.
Won	Cannot close an opportunity as won unless one RFQ/Proposals is won.
Lost	Cannot close an opportunity as lost unless one RFQ/Proposals is lost.

Creating an RFQ from an Opportunity – (Step by Step)

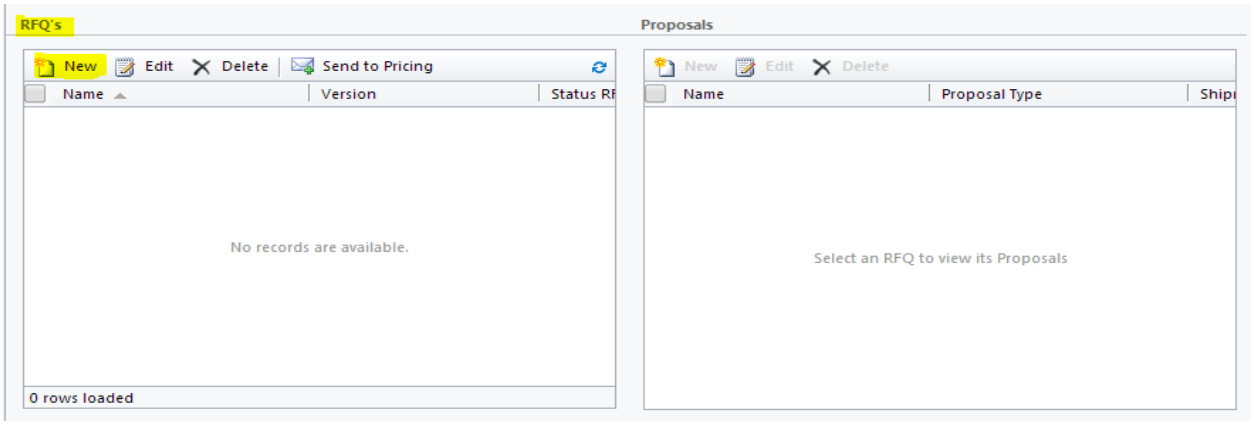
Go to the Opportunity menu and select the “New” button.



Enter the Topic and select the account.

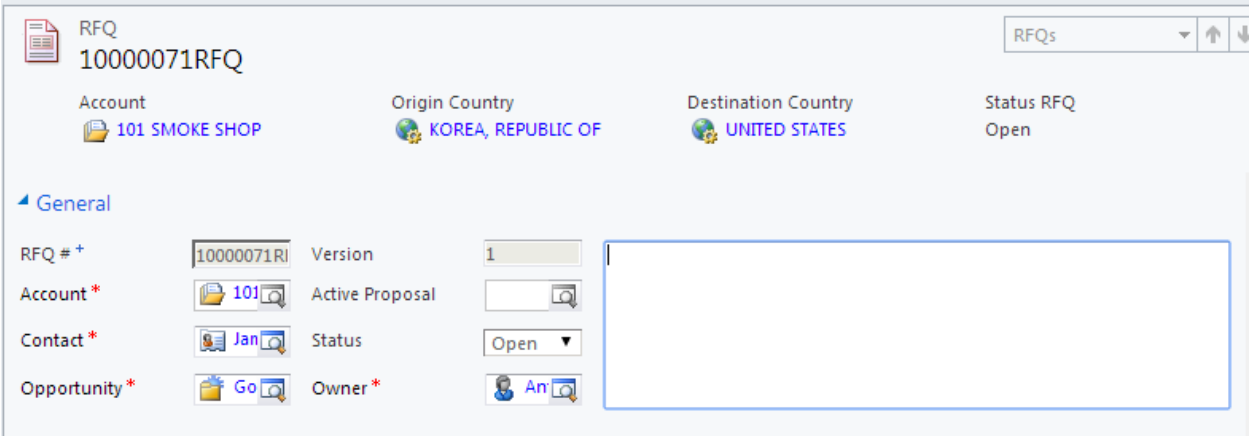


Click the “New” button on the RFQ grid to create a new RFQ. If the buttons are disabled on the grid, you will need to save the opportunity first in order to use the grid.

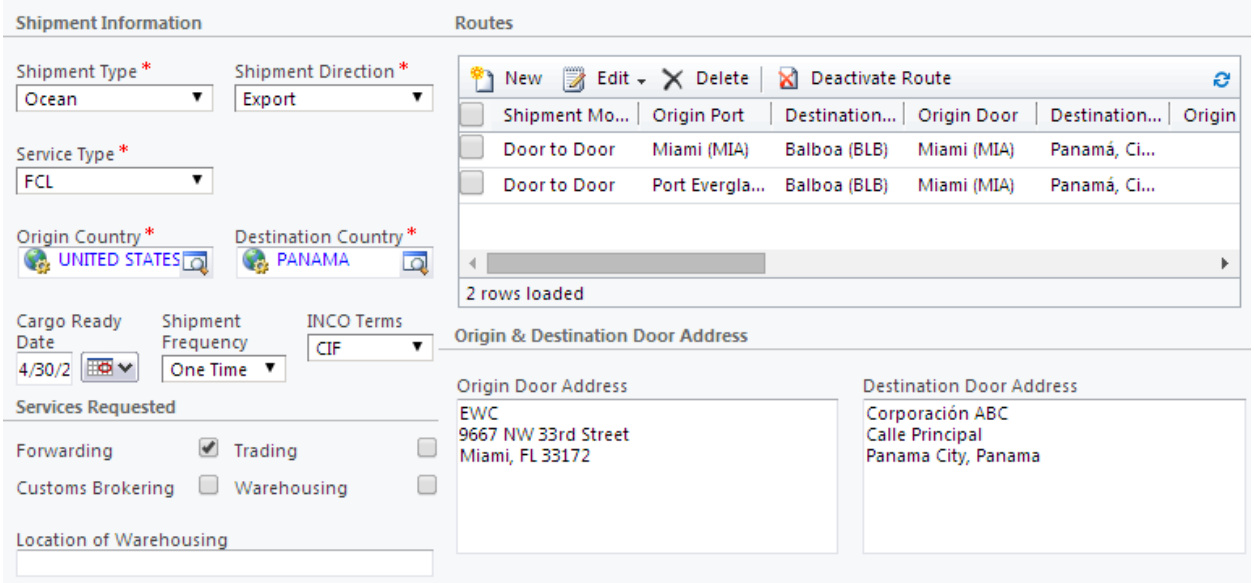


General Tab

Enter the general information



Shipment Information Tab



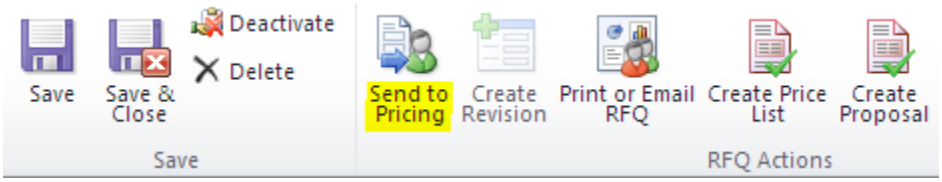
The Shipment Type, Shipment Direction and Service Type is required on the RFQ. It is also used as the default value when you create the multiple routes. Make sure to add the different route locations and the shipment mode (door to door, port to port etc…)

Enter Cargo Items

See Adding Cargo Items

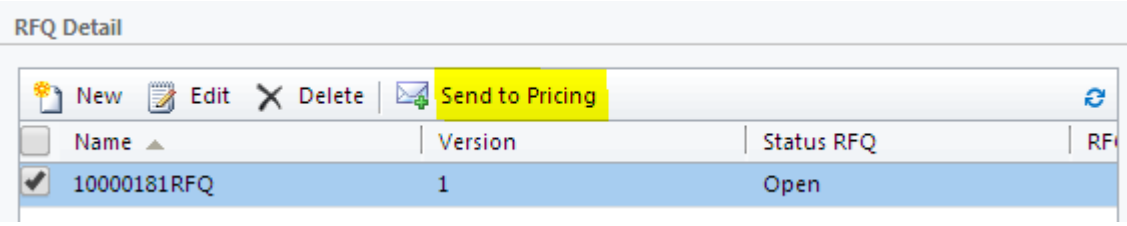
Submitting an RFQ to Pricing Queue

Once all the data is completed, you can send the RFQ to Pricing. To do this, click on the “Send to Pricing” button on the ribbon menu of the RFQ.

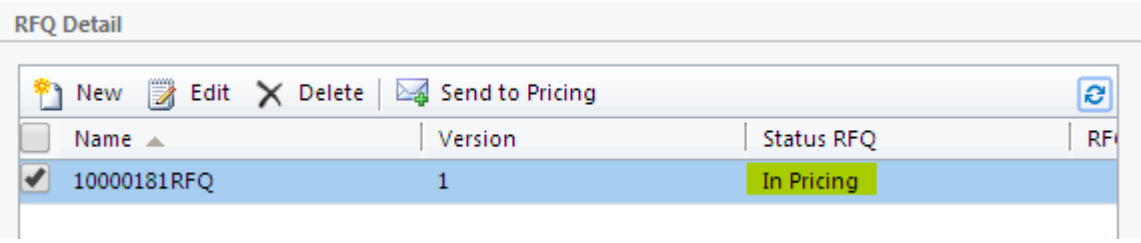


Click Save and Close.

You can also send from the Opportunity entity in the RFQ grid.



When you return back to the Opportunity and view the RFQ grid, the RFQ has moved from “Open” status to “In Pricing” status.



Here is a list of all the different RFQ statuses.

RFQ Statuses

There are several statuses

Status	Description
Open	RFQ has been created with status “Open”.
In Pricing	RFQ has been sent to Pricing. Pricing sees RFQ in Pricing Queue.
Assigned	RFQ has been assigned to a pricing individual to work.
Denied	RFQ has been rejected by the pricing department for lack of information. You must create a revision of the RFQ to send back to pricing to work.
Revised	RFQ with status revised indicates that a revision was made.
Completed	Pricing has completed the RFQ and you can no make the final status changes to the Proposal.
Won	Proposal has been won and you can click on the Won button to make the proposal set to won and that will mirror to the RFQ as won.
Lost	Proposal has been lost and you can click on the lost button to make the proposal set to won and that will mirror to the RFQ as won. All other proposals linked to the RFQ will be set to Lost.

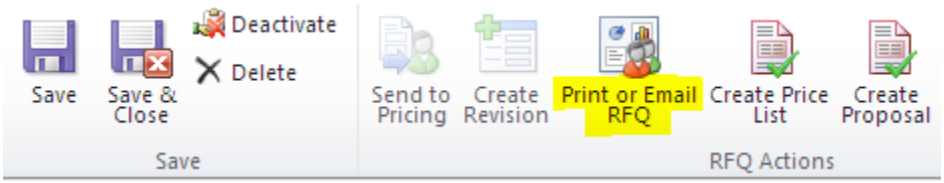
Close	Multiple proposals can be created on an RFQ but only on active proposal can be assigned to an RFQ. This leaves other proposals linked to the same RFQ. When one proposal is set to won, all other proposals linked to the RFQ will be set to close.

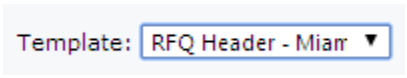
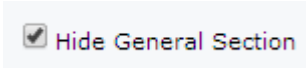
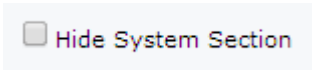
Output of RFQ

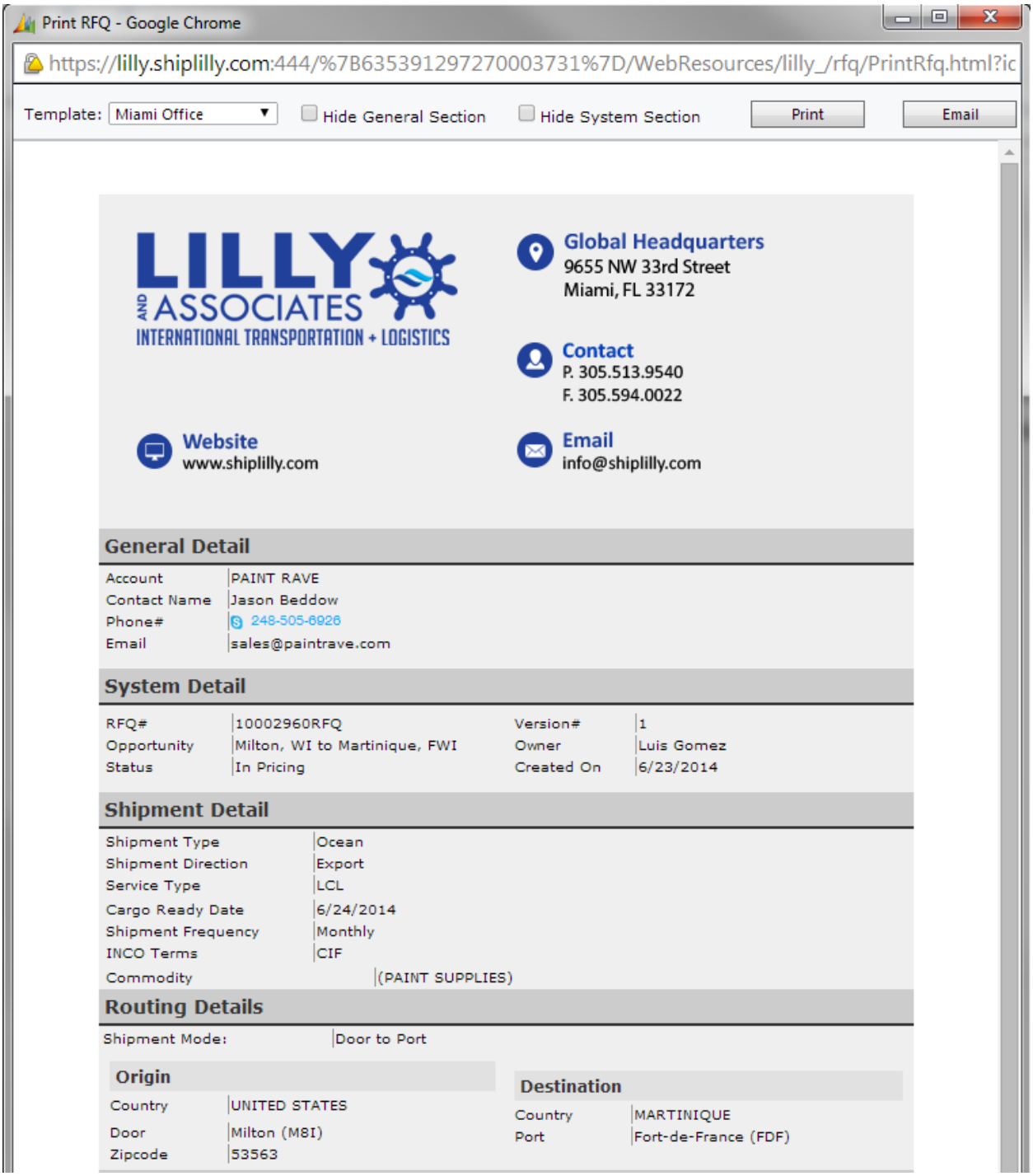
You can either print or email the output of an RFQ.

Emailing an RFQ

Click on the "Print/Email RFQ" button on the ribbon menu of the RFQ.

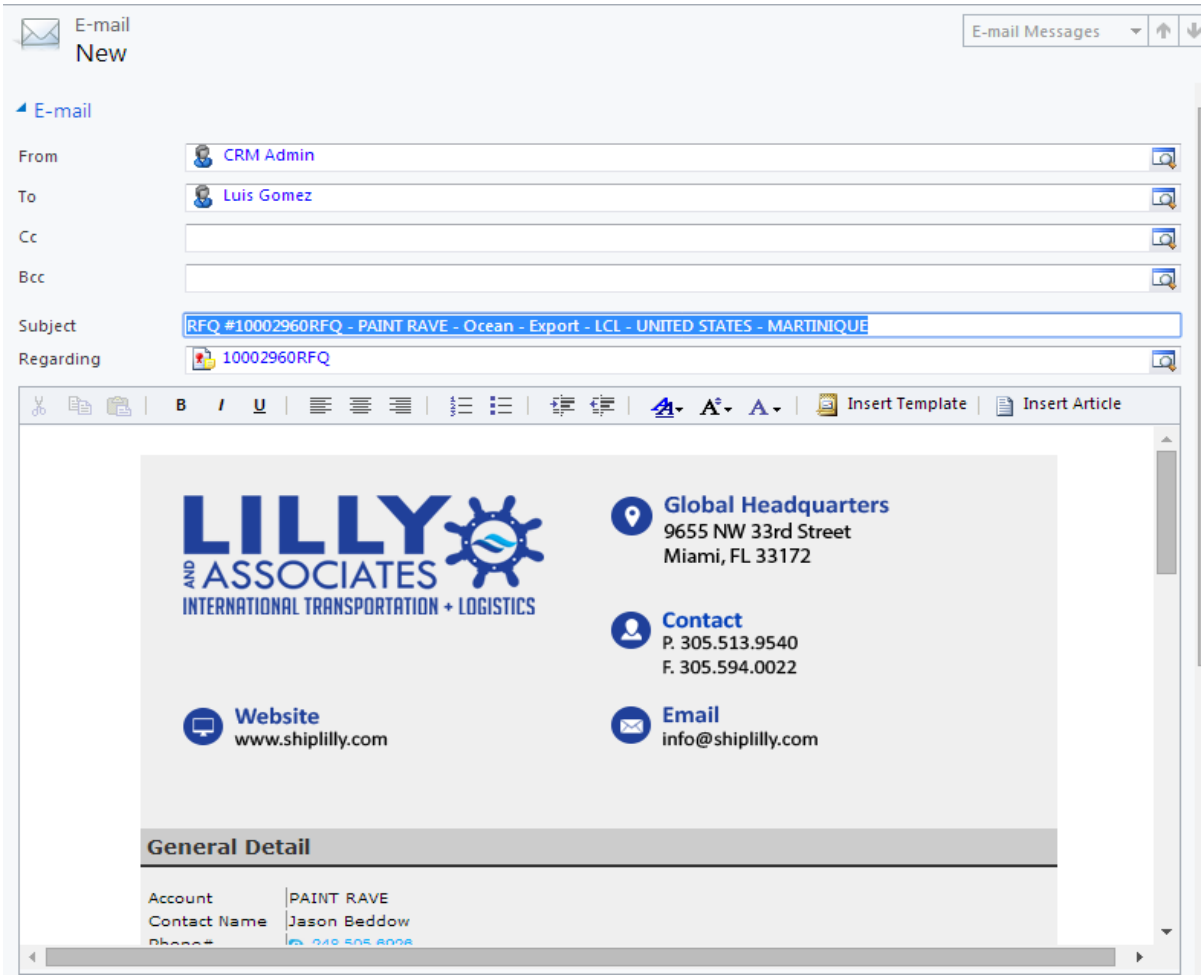


	Select the template header that will show the different office locations to toggle from.
	Hide General Information is selected by default which hides the Account contact information. Remove the check box to view the data.
	Hide System section hides the system information below. It is not set by default.



The Routing Details will show all the routes in one RFQ. If you only want to show a specific route, return to the RFQ and open one of the routes and select the “Do not show” check box.

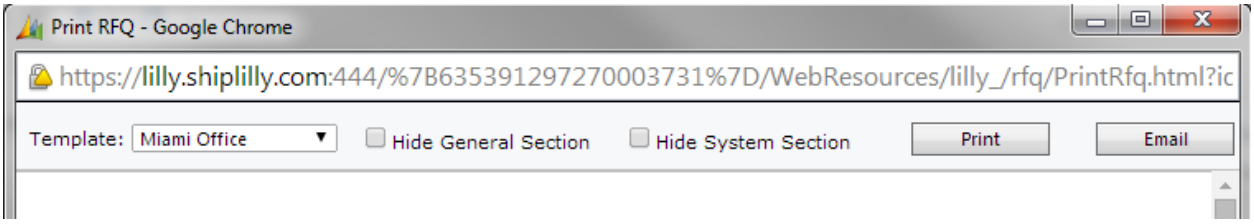
Click the Email button to open the Email window.



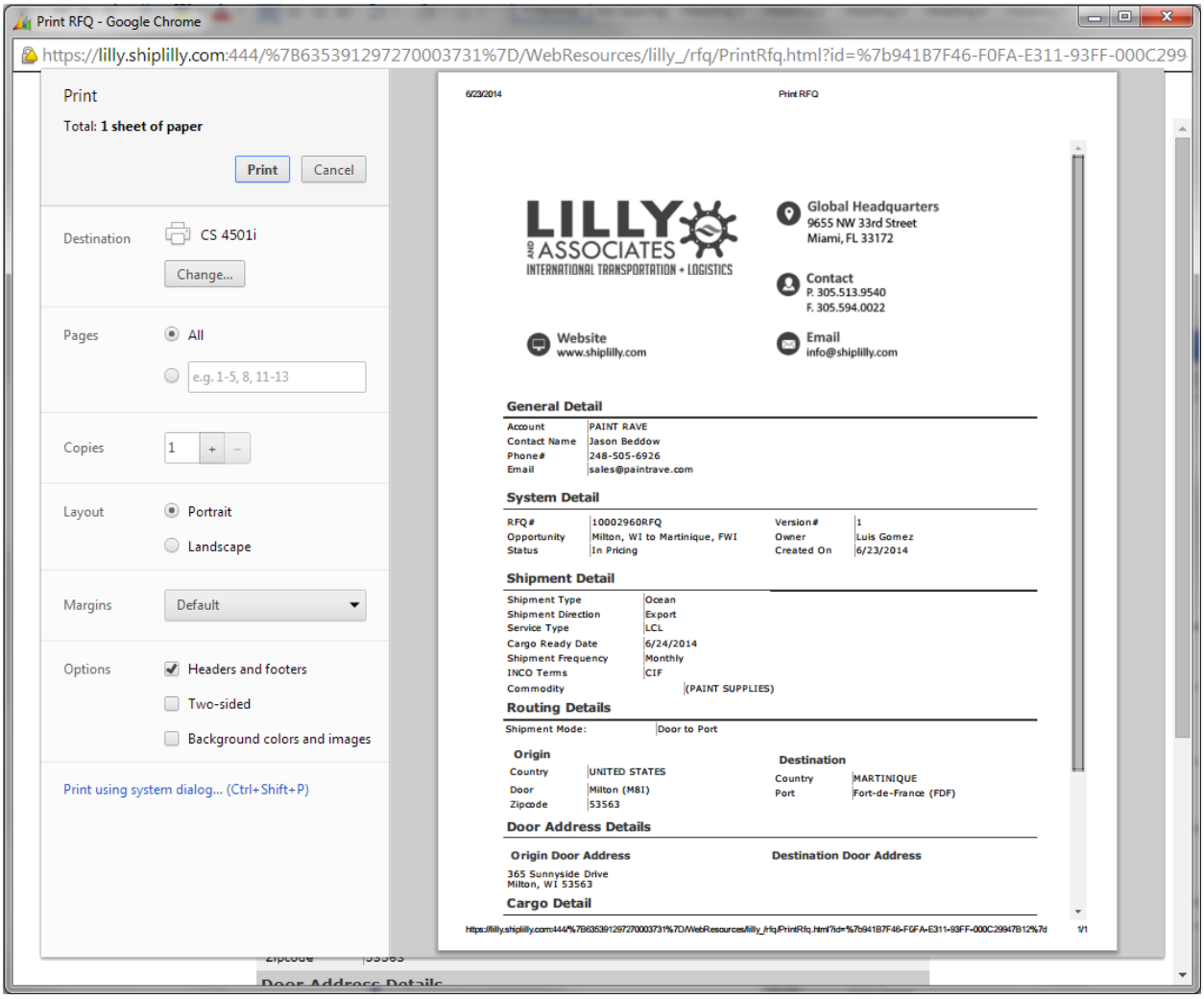
You can make edits to the bod of the message if needed. Click the “Send” button to send email.

Printing an RFQ

Click on the “Print” button on the top menu bar.



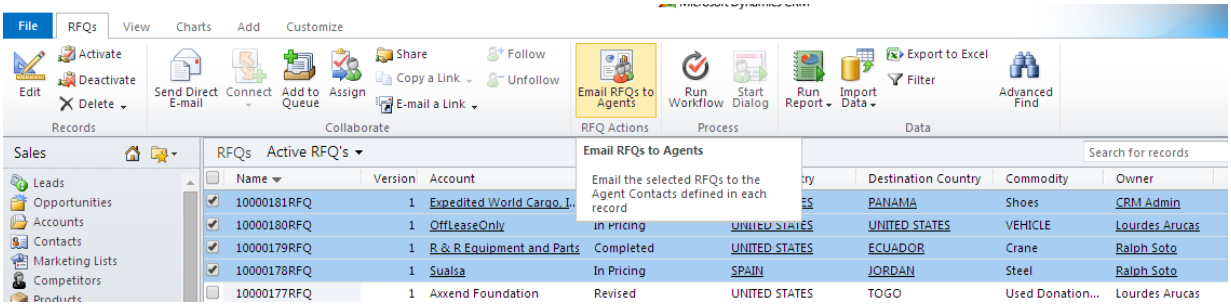
The print preview pop up window will appear



Click Print to Print the RFQ.

Emailing RFQ to multiple Agents

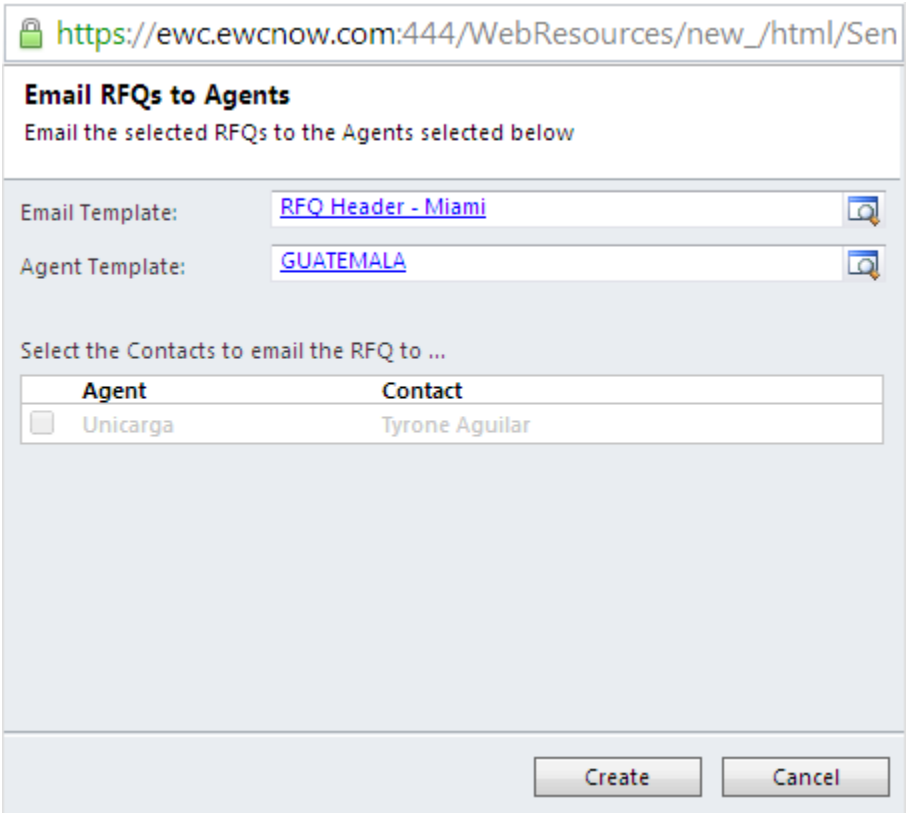
If you are looking to send the RFQ to multiple agents, you can use the RFQ grid and click on the “Email RFQ to Agents” button. Select the multiple RFQ’s you would like to send and click the “Email RFQ to Agents” button.



The Email RFQs to Agent pop up window will appear. Select the email template header from the list and select the agent template from the list. This will pull the agents that are grouped under that agent

template. If the name is read only like below, it means the contact does not have an email address and cannot be selected.

See Agent Templates



Click create and it will send the RFQ as an email to those selected RFQ's.

Adding Cargo Items

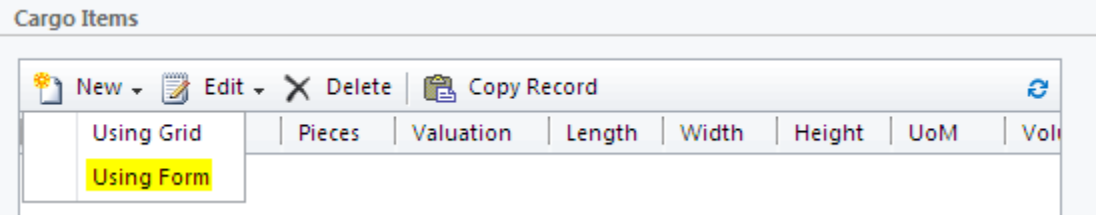
The cargo details can be entered in the lead, RFQ and proposal. The data will carry from one entity to another in the process. There are two types of cargo items.

1. Loose Cargo
2. Containers

Only enter one type per lead, RFQ and proposal. Do not combine loose cargo and containers within an entity in the same cargo detail grid. Outputs are designed by these two types of cargo items. Combining them gives you bad output results.

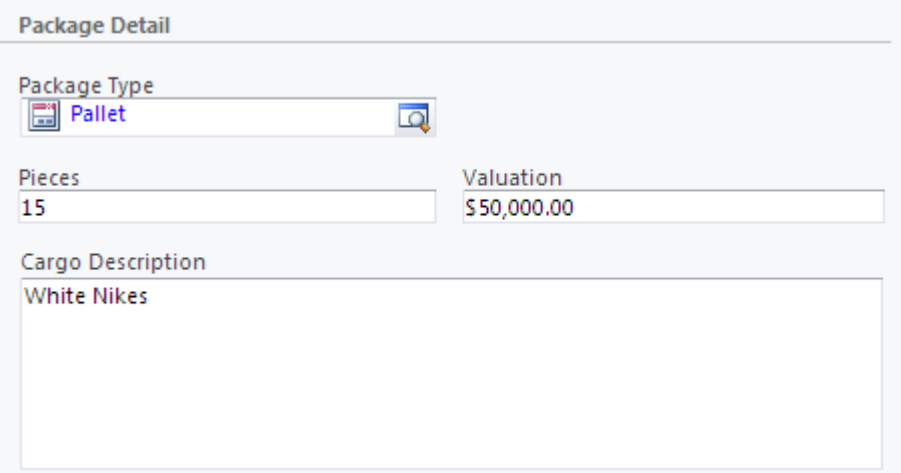
Adding Loose Cargo Items

Go to Cargo Detail grid and select the “New – Using Form” button in either a lead or an RFQ.



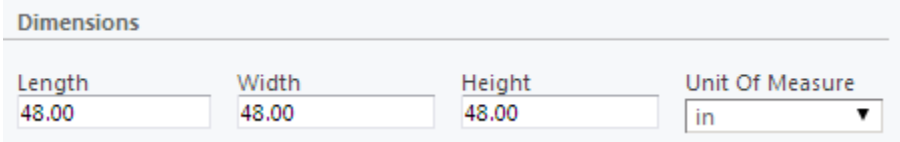
Package Detail

Click on the Lookup button on the Package Type field to search for a package type or enter directly into the field.



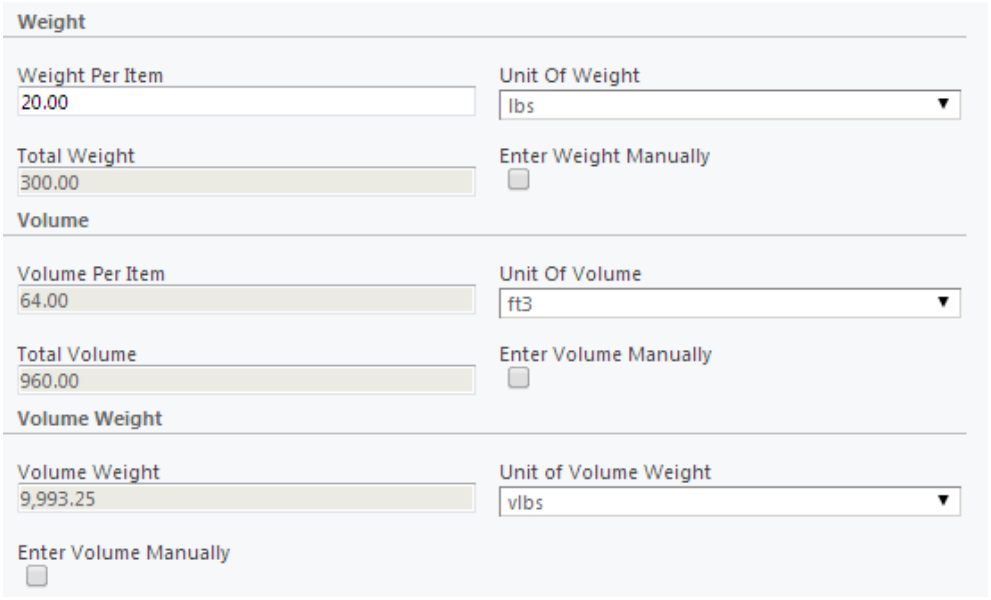
Dimensions

Enter the length, width and height.



Weight-Volume-Volume Weight

Enter the weight, volume and the volume weight will be calculated.



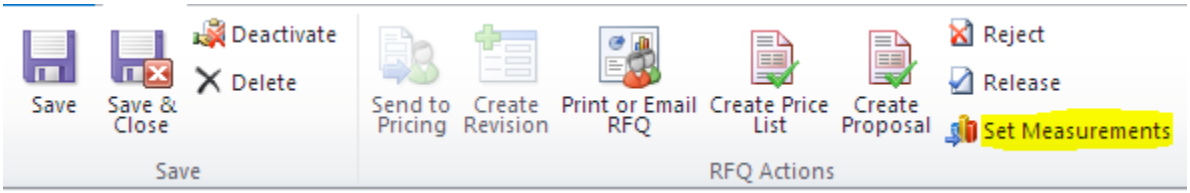
Temperature control

Click save to save the cargo item record.

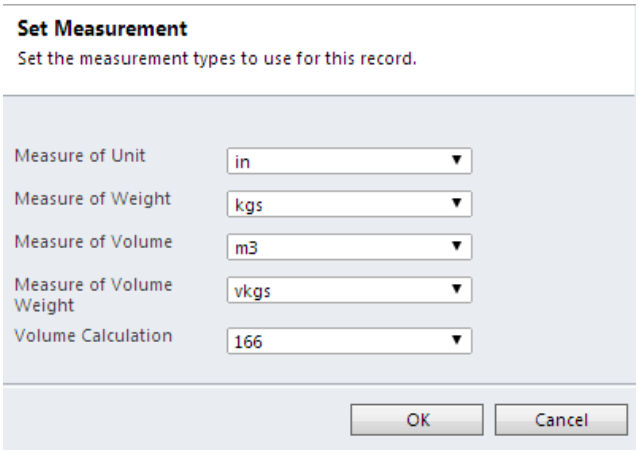
Measurement Units

In any of the entities that contain cargo detail, the “Set Measurement” button will allow you to change the unit of measures, weight and volume and specify the volume weight factor.

Go to an RFQ and select the “Set Measurement” button on the ribbon menu.



The set measurement pop up window will appear. From here you can change the values to dimensions, weight, volume and volume factor.

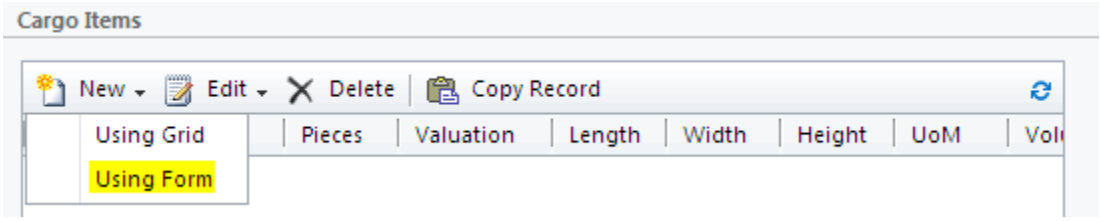


Below is a description of each option.

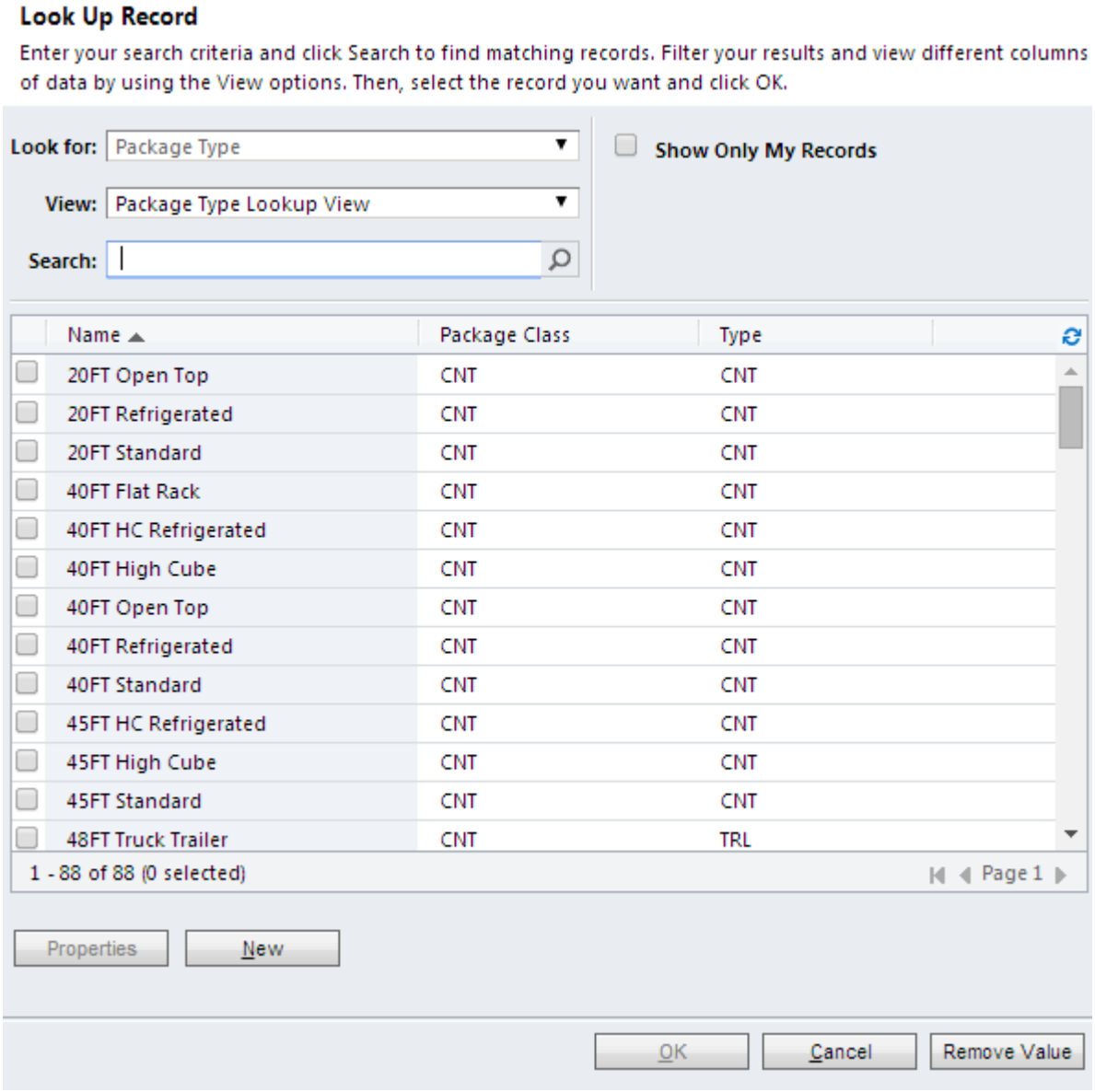
Type	Description
Measure of Unit	inches (in), centimeters (cm), meters (m), yards (y), foot (f)
Measure of Weight	Pounds (lbs), kilograms (kgs), tons (t), ounces (oz), grams (g)
Measure of Volume	Square foot (ft3), square meters (m3)
Measure of Volume/Weight	Volume Pounds (vlbs), Volume Kilograms (kgs)
Volume Calculation	139, 166, 194 – Calculated by inches

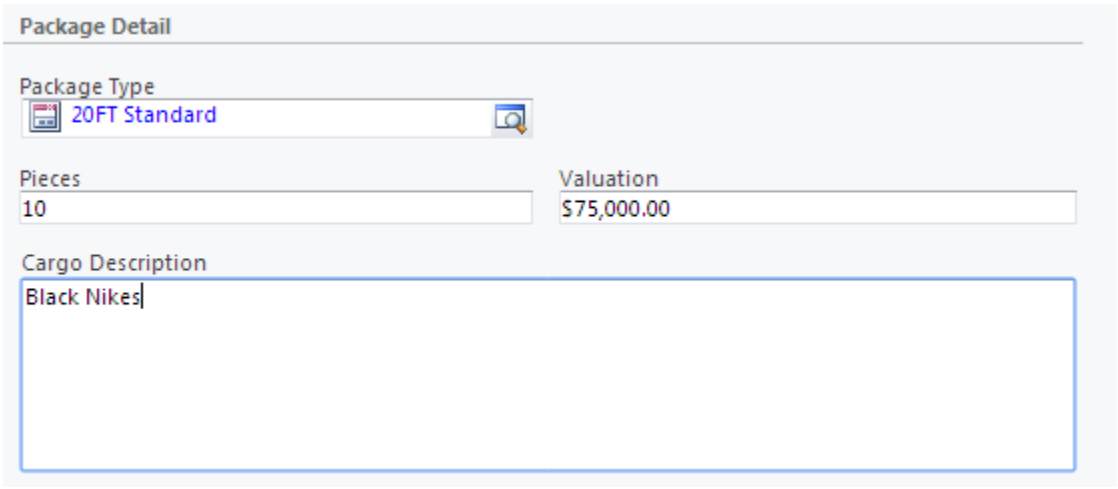
Adding Containers

Go to Cargo Detail grid and select the “New – Using Form” button in either a lead or an RFQ.

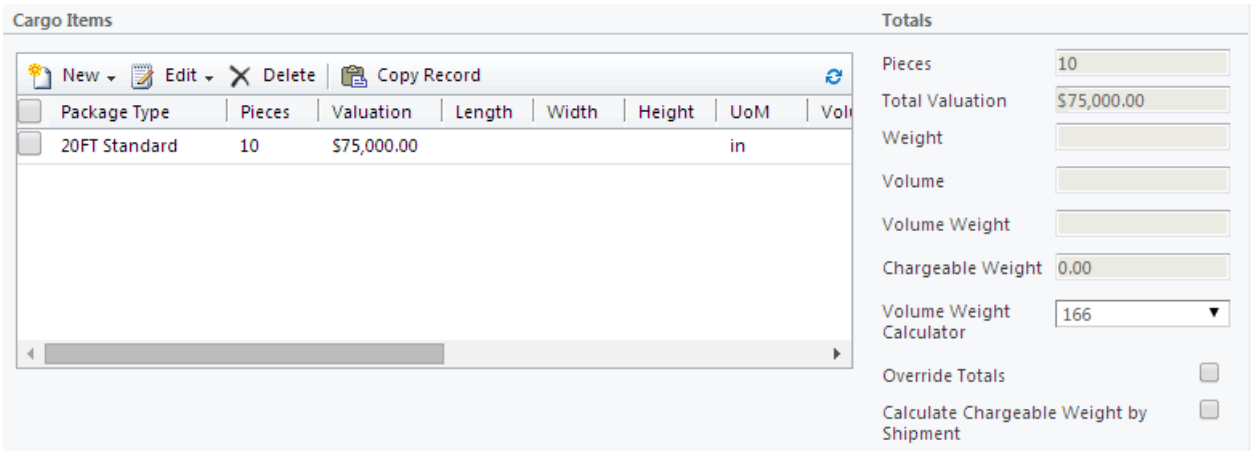


Select the container from the Package Type pressing the lookup button. Click on the container from the list and click OK.





Click on the refresh button on the grid to view the record just entered.



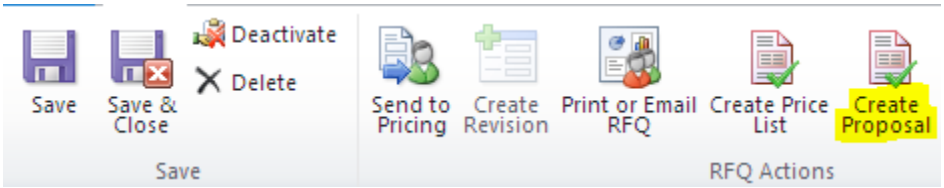
Creating a Proposal

Proposal can be created in several ways but the most common way will be from the RFQ. The first example below will show in detail the proposal entity.

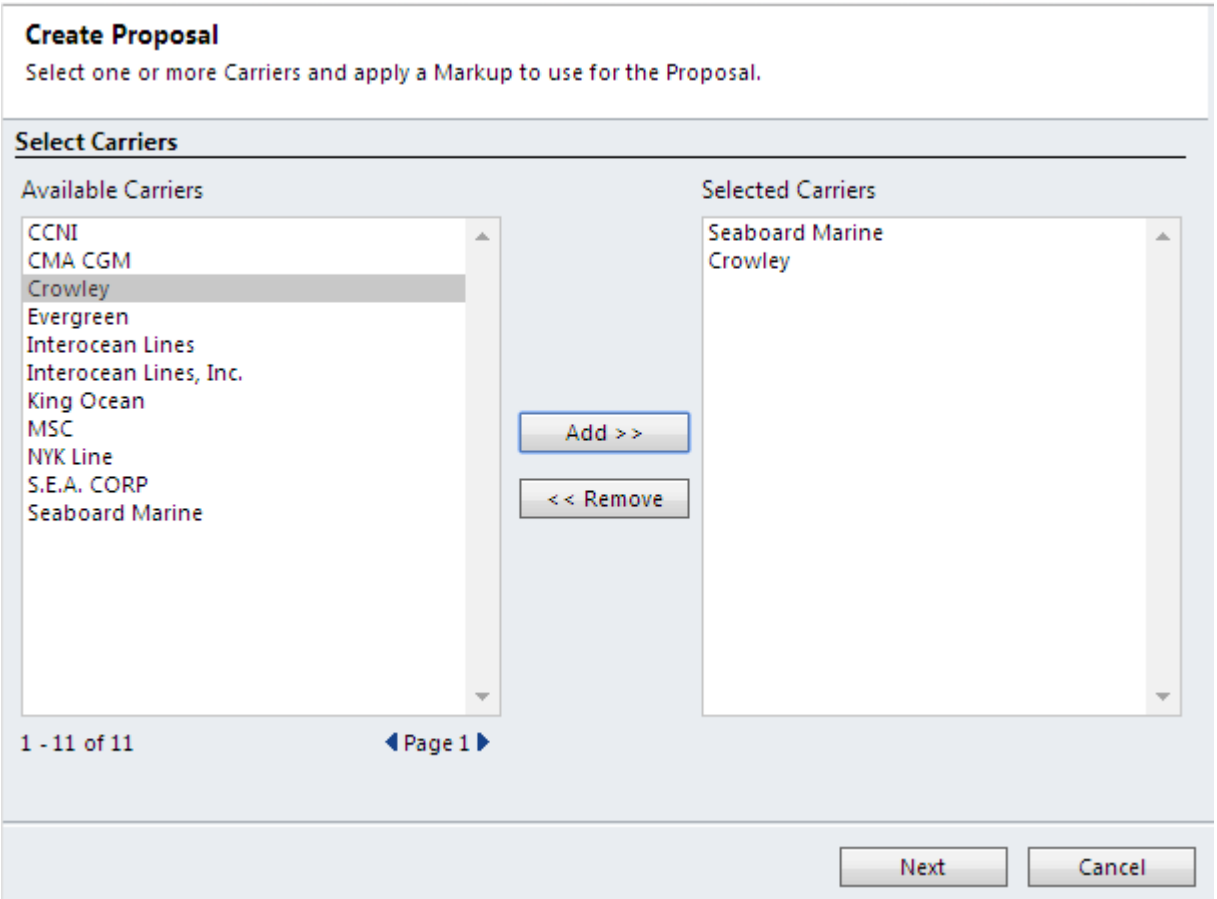
1. Create proposal from RFQ
2. Copy from an existing proposal

Creating a Proposal from an RFQ

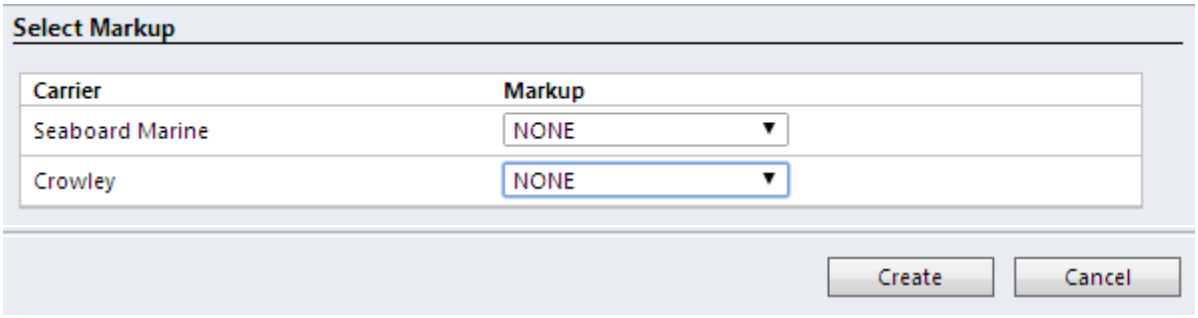
As the pricing person, when RFQ's are sent to pricing, they will appear in the pricing queue. From there you can open the RFQ and select the "Create Proposal" button.



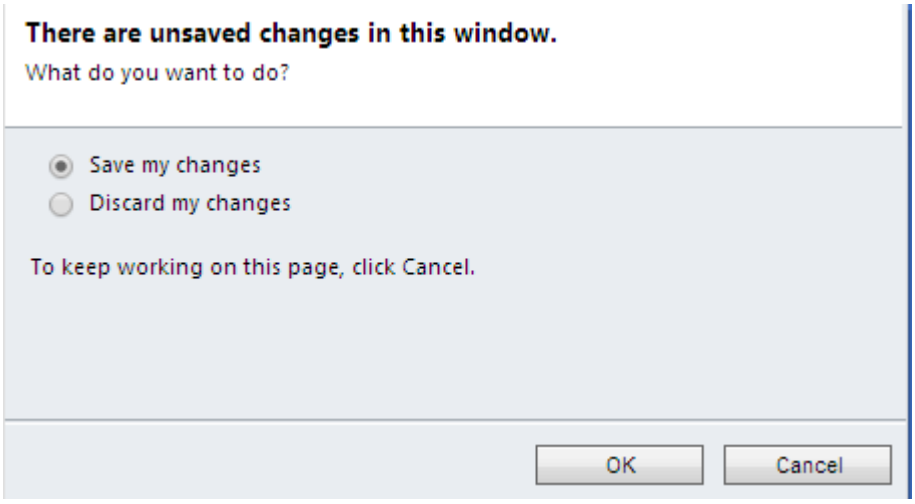
The select carrier pop up window will appear. Select the number of carriers you want to include in the proposal. Click the Next button once you have selected the carriers.



Markup Screen – Make sure to always select “NONE” for now. We will be making changes related to how markups are to apply. Click the “Create” button.



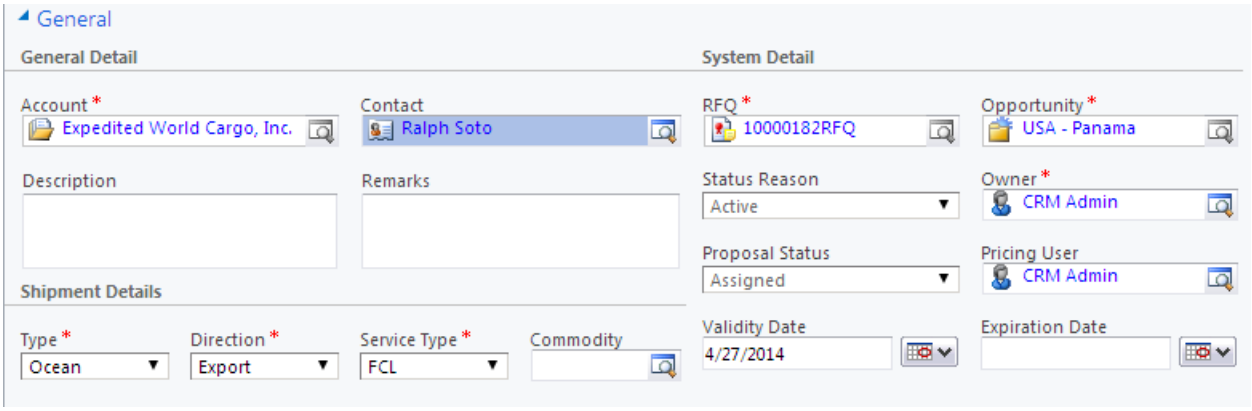
A pop up window will appear to save changes, click ok.



The new proposal will appear with the data from the RFQ copied over.

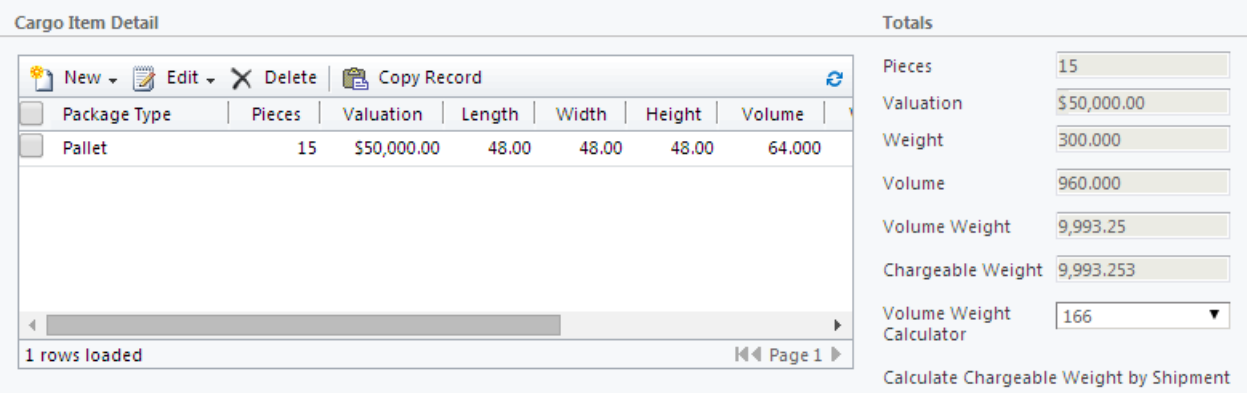
General Tab

The general information will carry over from the RFQ. Proposal status is now set to “assigned” because a pricing person is now working on it.



Cargo Items Tab

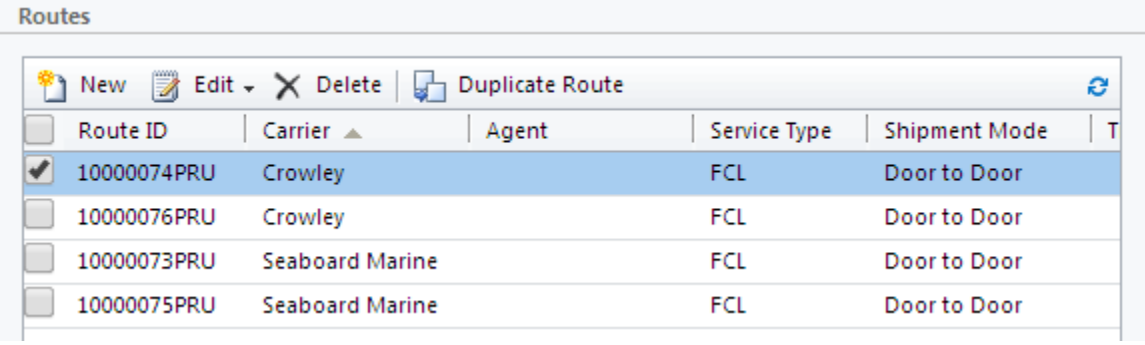
The Cargo Items are copied over from the RFQ

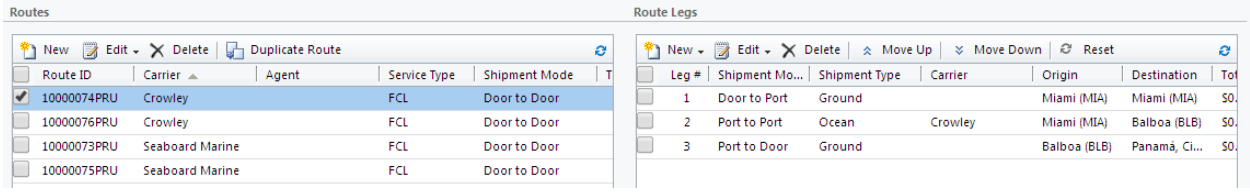


Routes & Routes Legs

Routes

The Route contains the carriers and different route origins and destinations. Since we had previously entered two routes (Miami to Balboa, Port Everglades to Balboa), the system creates two routes for each carrier selected.



Route Legs

The route legs are created automatically using the shipment mode type. In the example below, the shipment mode used was door to door. The route legs will create the door to port, port to port and port to door leg. This allows the pricing person to enter carriers and rates within each leg if they happen to be different carriers.