Job Aid

Partner Portal Tool – CRM LtQ

Process

CPC

Authors: Jonna-Li Catrini

Release Date: March 23, 2020

Version: 1.0

METTLER TOLEDO

SAM Excellence

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2 Change history

Version	Date	Change description	Name
V1.0	March 23, 2020	Initial version	JL Catrini
V1.5	June 25, 2020	Revision from RSM feedback	S French
V2.0	July 21, 2020	RFQ Automation added, corrected account/contact screenshot	S French

3 Introduction

The Job Aid is designed to aid the Channel Partner Contacts in navigating the Hybris tool

4 Important Terms

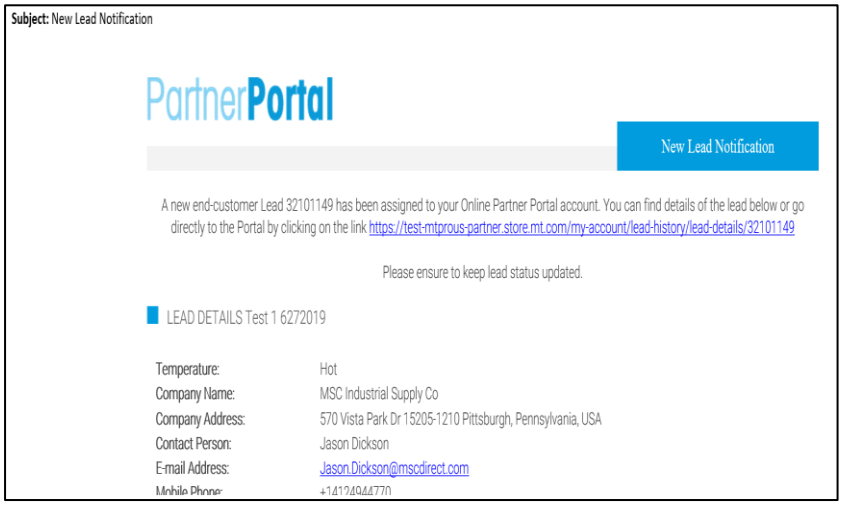
Channel Partner Contact (CPC) = Individual Rep
Channel Partner (CP) = Rep Group
Sales Rep = Regional Sales Manager
Sales Manager = District Sales Manager
Business Area Manager = Sales Manager
Hybris = new platform for Lead/Opportunity/Quote management
Lead Id = unique Id # that will be used to identify all Channel Partner leads. Used in Hybris and in existing MT PIUS Portals to link
Hot leads = Customer is interested in purchasing and timeframe is defined. Purchase is imminent.
Warm leads = Customer is interested in purchasing but timeframe is unknown, and more information is needed.
Cold leads = Customer is requesting information or literature.

5 Stages and Actions

Lead Creation happens in the **SAP CRM** system by **Marketing**
Lead Accepting and Follow Up happens in **Hybris** by the **Channel Partner Contact**
Opportunity is created in **Hybris** by the **Channel Partner Contact**
Request for Quote is created in the **Partner Portal** by the **Channel Partner Contact**
Opportunity Submitted via **Hybris** by the **Channel Partner Contact**
Quote Creation in **SAP CRM** by **Inside Sales**
If needed **Quote Revision** requested in **Hybris** by the **Channel Partner Contact**
Quote Acceptance and Opportunity Follow-Up in **Hybris** by the **Channel Partner Contact**

6 Basics

When a HOT Lead is created and distributed from MT PIUS and sent to Hybris the Channel Partner Contact will receive an email similar to the one below.



Subject: New Lead Notification

PartnerPortal

New Lead Notification

A new end-customer Lead 32101149 has been assigned to your Online Partner Portal account. You can find details of the lead below or go directly to the Portal by clicking on the link https://test-mtprous-partner.store.mt.com/my-account/lead-history/lead-details/32101149

Please ensure to keep lead status updated.

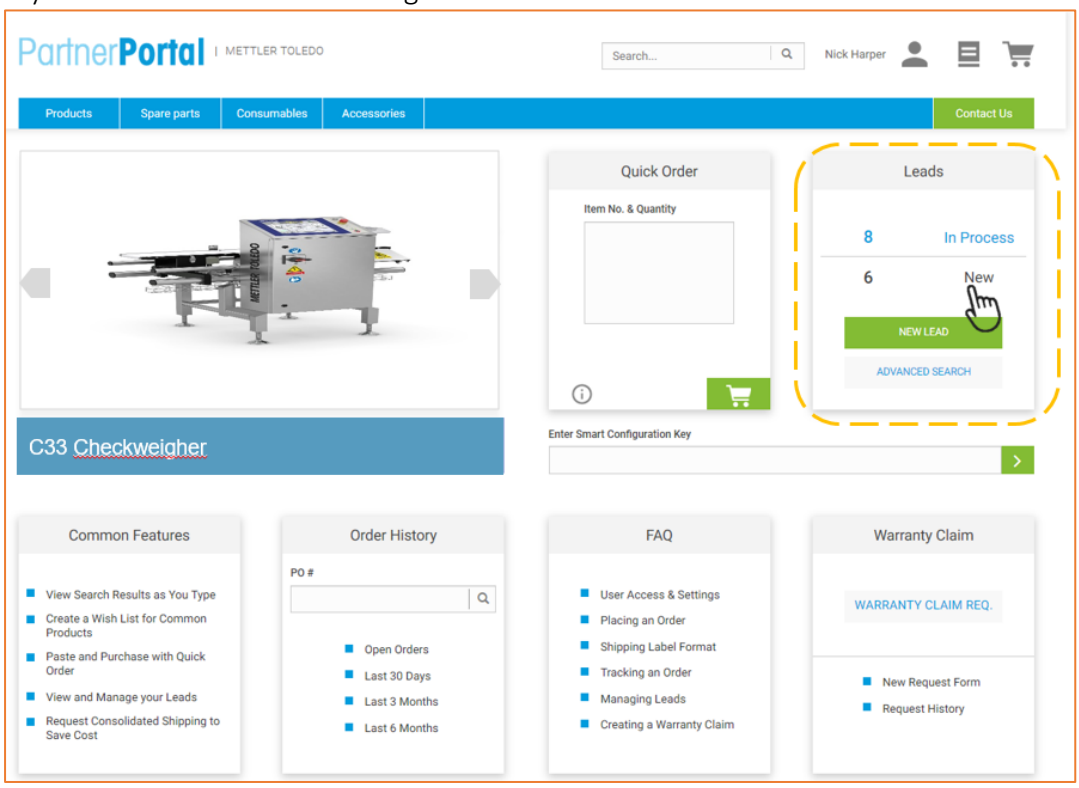
LEAD DETAILS Test 1 6272019

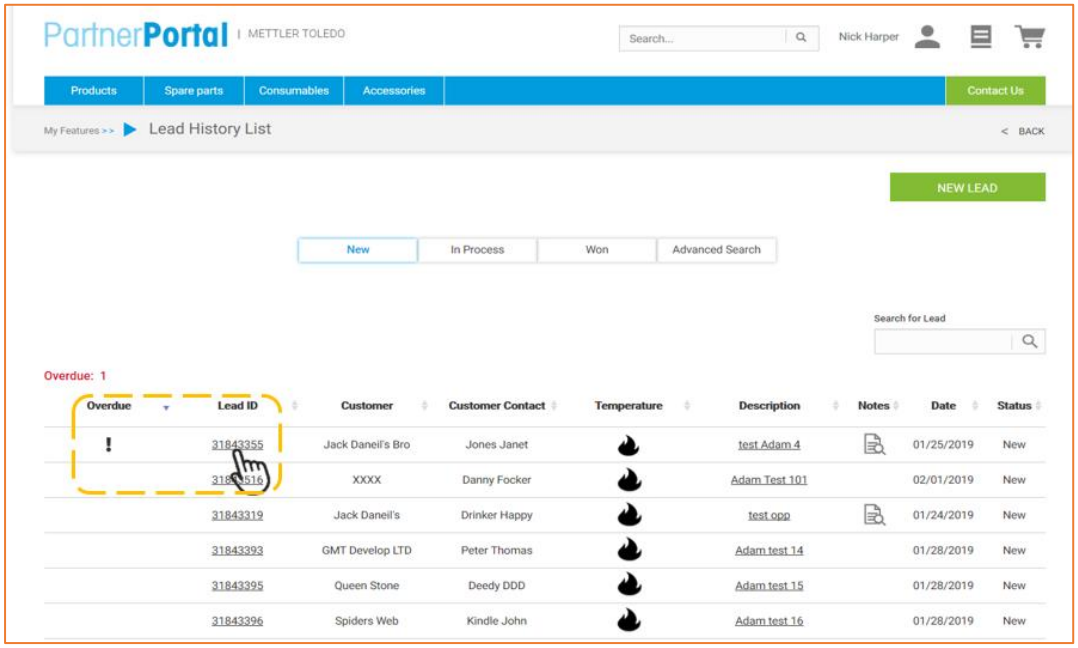
Temperature:	Hot
Company Name:	MSC Industrial Supply Co
Company Address:	570 Vista Park Dr 15205-1210 Pittsburgh, Pennsylvania, USA
Contact Person:	Jason Dickson
E-mail Address:	Jason.Dickson@mscdirect.com
Mobile Phone:	+14124944770

You can access the Lead by clicking directly on the link in the email or by logging in to the Hybris system

A new end-customer Lead 32101149 has been assigned to your Online Partner Portal account. You can find details of the lead below or go directly to the Portal by clicking on the link https://test-mtprous-partner.store.mt.com/my-account/lead-history/lead-details/32101149

If you choose to log in navigate to the Right-Top corner to the Leads box and click on where it says New – Do Not click on the green New Lead icon





7 PartnerPortal User Settings

7.1 Account Settings

To change the account settings click on the person icon displayed in the upper right hand corner of the screen.

Then, click "My Account."

7.2 Shared Email Addresses

Each user account requires a unique email address. No exceptions can be made if a company's employees all use the same generic e-mail address

7.3 View All Transactions or Leads for Multiple Locations

If your organization has multiple sales/service offices, request expanded access to view transactions for multiple locations. To enable expanded access, place a request using the "Contact Us" button.

NOTE: only one location can be selected during each login session. User needs to log out and log in again to select a different location.

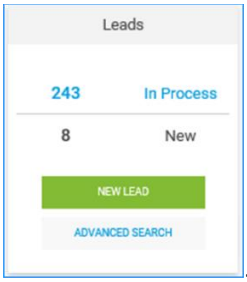
8 Self-Generated Leads

METTLER TOLEDO will send leads to the PartnerPortal, but you also have the ability to enter your own leads.

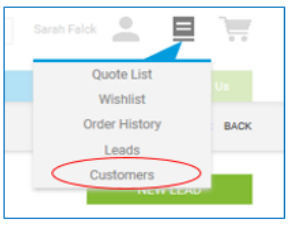
Create a self-generated lead using the Customer List feature. Here you will find all METTLER TOLEDO accounts and contacts that fall within your territory.

To access the customer list you can:

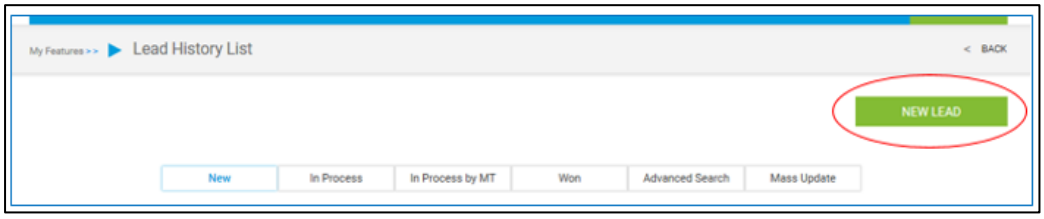
1. Click New Lead on the homepage lead dashboard



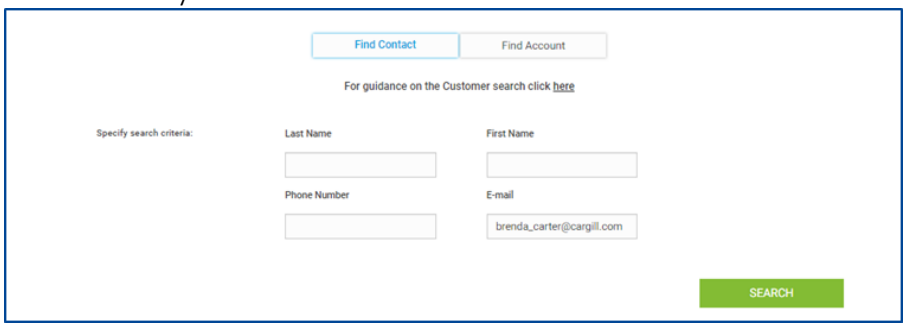
2. Using the List in the upper-right hand corner, click "Customers"



3. Click New Lead from anywhere within the Lead History List.



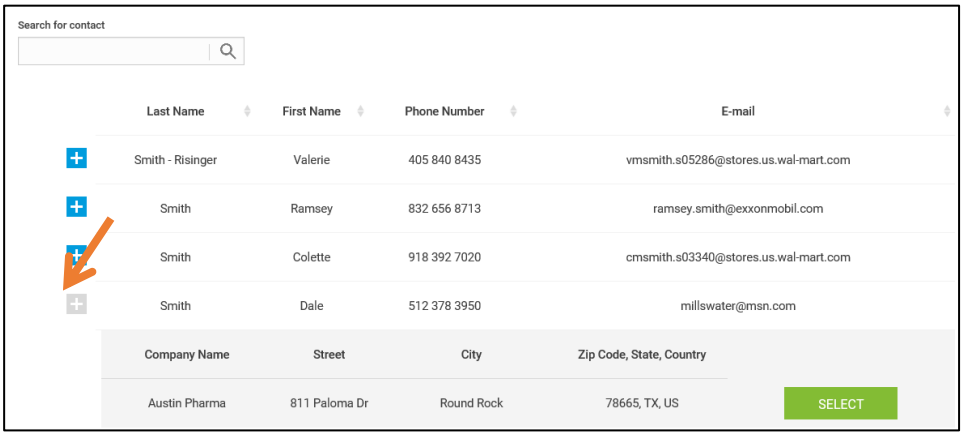
This will take you to the Customer List



8.1 Searching Contacts and Accounts

To search for the contact:

- Search first by entering only the contact's email.
- Click "Search" to view results.
    - If contact cannot be found, search by contact's first name, last name, or phone number (no spaces or characters)
- Click the Plus symbol (+) next to the contact name to expand the view and see all accounts associated with the contact

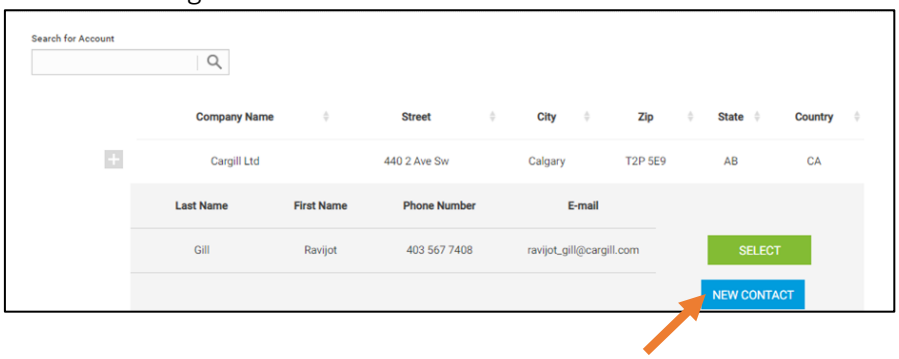


- If you find the account or contact click on select. This will lead you to the New Lead page
    - If the contact or related account are not available in the results list search by account before selecting "new contact"

To search for the account:

- First, search by entering the account's Name, postal code, and street address.
    - To broaden the search enter just the first three digits of the company name.
        e.g. "Car" returns all accounts in the postal code that begin with "Car"

- Click search to view results.
    - If the account cannot be found, you can also search by city.
- Select the account by clicking the plus sign next to the name. This will display all contacts associated with this account.
- Choose the correct contact for the lead and click "Select." This will lead you to the New Lead page.
    - If you are unable to find the correct contact listed, you may create a new one by clicking "New Contact." This will lead you to a page to create a contact before creating the lead.



NOTE: If you are only able to find the contact but not the correct associated account, ***OR*** if you could not find the account at all, please proceed with the creation of a new customer by clicking "New Customer."

8.2 Create a New Customer

At the New Customer page, users are prompted to manually enter the company and contact information before entering your new lead information.

- Enter all relevant account and contact details. All fields are required except for Company Name Line 2 and Address Line 2. Phone number must be entered without spaces or characters. (e.g. 8135551234)

Important note: Country must be chosen before entering the state

- After all information has been entered, click "Create Lead"
- You can also click "Create Customer" if you would like to create this new account and contact, but not generate a new lead. After clicking "Create Customer," you will receive a message that the request has been created. Our internal team will work to enter this new account and contact into our CRM.

8.3 Creating the Lead

On the New Lead page, the customer information will appear at the top of the page. This information will match the contact/account you selected in the Customer List, OR the information you manually entered on the New Customer page.

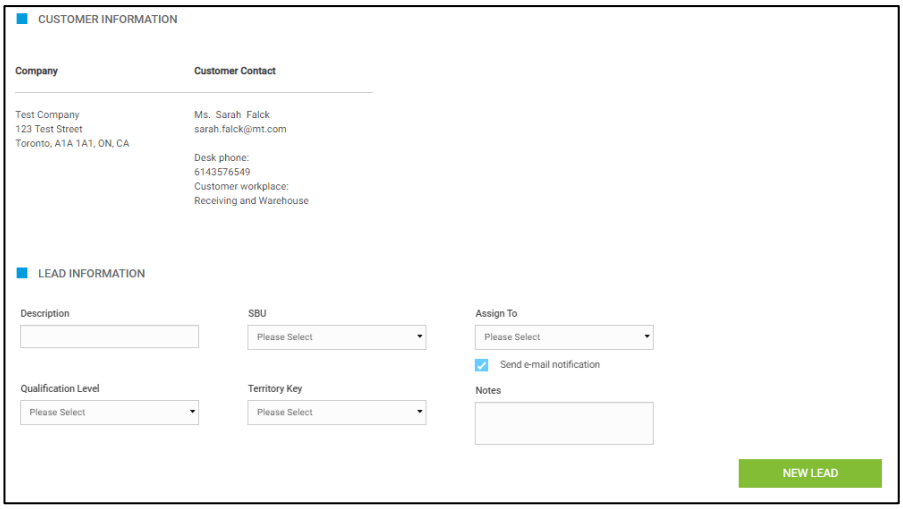
- Enter the lead information in the description as shown below:

Lead Description		
SBU	**Sales or Service**	**Customer Need**
PI = Unknown	S = Sales	NM = New Machine
MD = Metal Detection	V = Service	PX = Prod X
XR = X-ray Inspection		RT = Rental
CW = Checkweighing		SP = Spare Parts
VI = Vision Inspection		PK = Parts Kit
TT = Track & Trace		SA = Service Agreement
		UP = Upgrade for MD, XR, VI, PCE
		TR = Training
		OS = On Site Service (PV,certification, healthcheck) (Break Fix is a Customer Request)

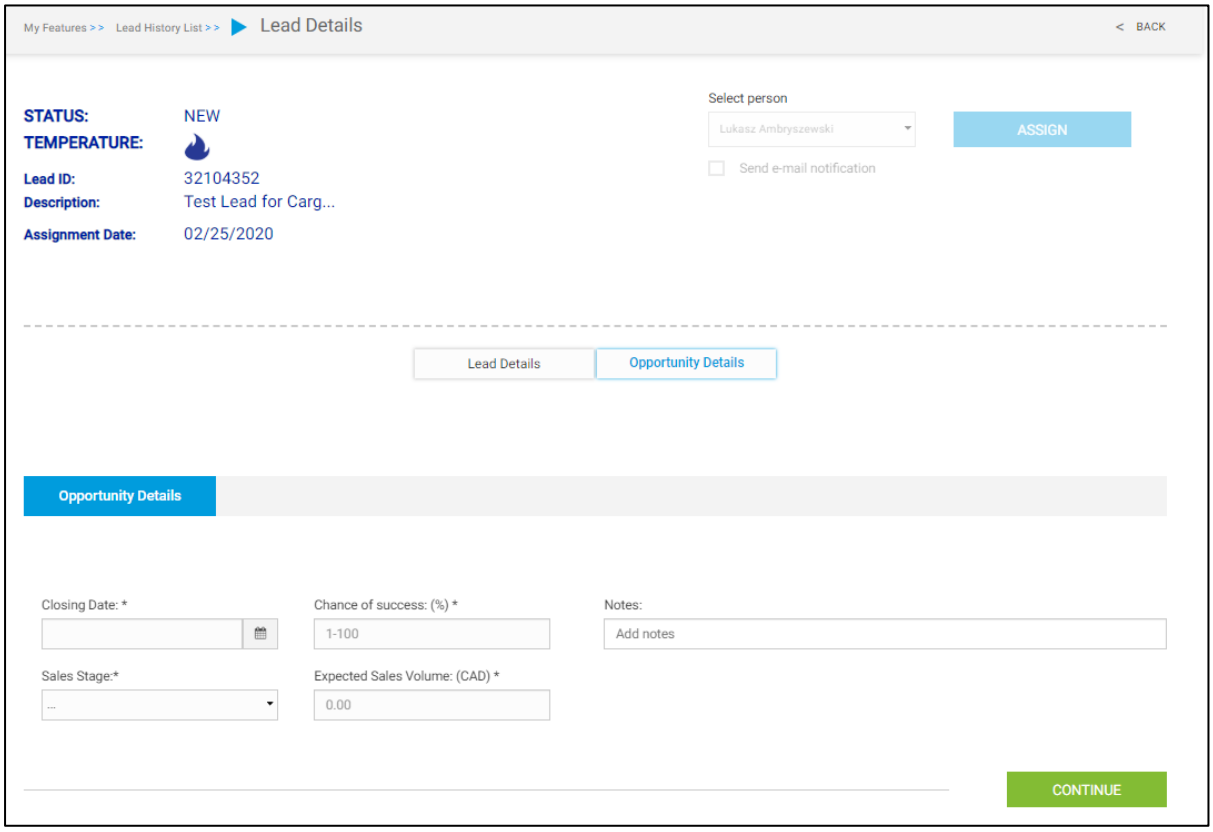
Lead description is a combination of ea of these columns separated by _. See New Equipment Examples below:

MD_S_NM
CW_S_NM
XR_S_ NM
VI_S_NM
TT_S_NM

- For the SBU select ONLY one of the following: Checkweighing, Metal Detection, Vision Inspection or X-Ray
- Assign to yourself or an associate.
- Set the Qualification Level to either Hot, Warm or Cold
- Territory Key options will populate in the dropdown based on your SBU selection.
    - Only choose the machine relevant Territory Key, not rental, upgrade, parts or service, only CW, MD, XR, VI or PCE
- Enter any pertinent notes.
- Click "New Lead"



After clicking "New Lead," you will be redirected to the Lead Details page. Lead status will be "New" and it will now appear in your New Lead list.



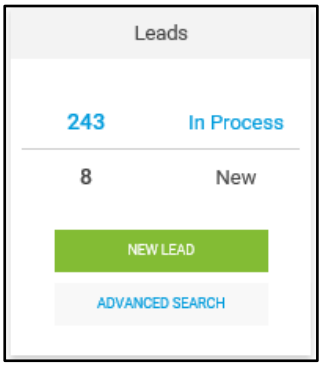
9 Lead Management

9.1 Receiving Leads

Lead email notifications will be sent to your organization's lead coordinator(s), or if no lead coordinator, directly to the channel partner assigned to the lead.

If there is a lead coordinator, they will be responsible for assigning the lead to the appropriate partner.

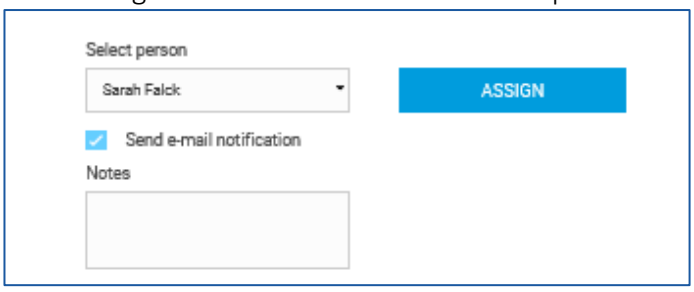
The leads dashboard, on the homepage of the Portal, provides a simple overview of all new leads and leads that have been converted into opportunities but have not been closed.



9.2 Accepting & Assigning Leads

Only lead coordinators can assign lead to another partner. To assign the lead, click into the lead by clicking on the Lead ID that you wish to assign.

- Use the "Select person" dropdown to assign the lead to the appropriate partner
- Checkmark "Send email notification" to alert the partner of the lead assignment
- Click "Assign" to distribute the Lead to the partner



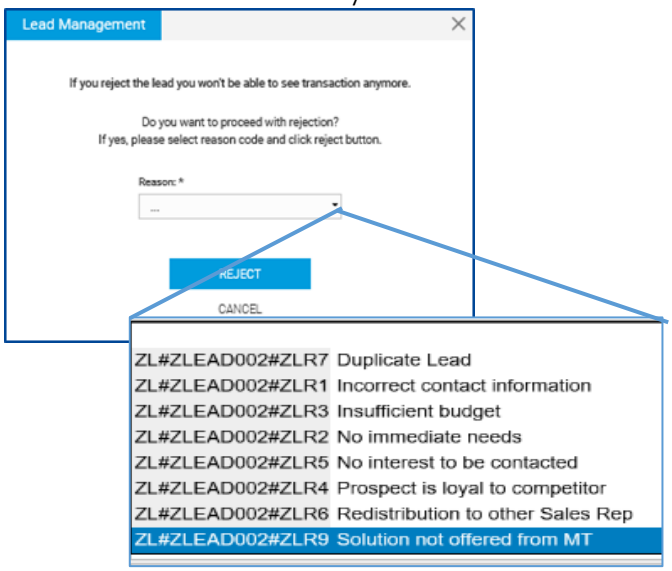
Once the lead is assigned, the coordinator or partner will need to accept or reject the lead.

If no lead coordinator, the lead can be accepted by the Channel Partner.

Once the lead is accepted, the coordinator or partner can proceed with updating the Lead Opportunity Details.

9.3 Rejecting Leads

If there is no current opportunity for a particular lead, you can reject it. When you reject the lead, you will be prompted to enter a reason using a dropdown. Once a lead is rejected, the lead will be removed from your list.



The Following reasons return the Lead to Marketing for nurturing or redistribution:

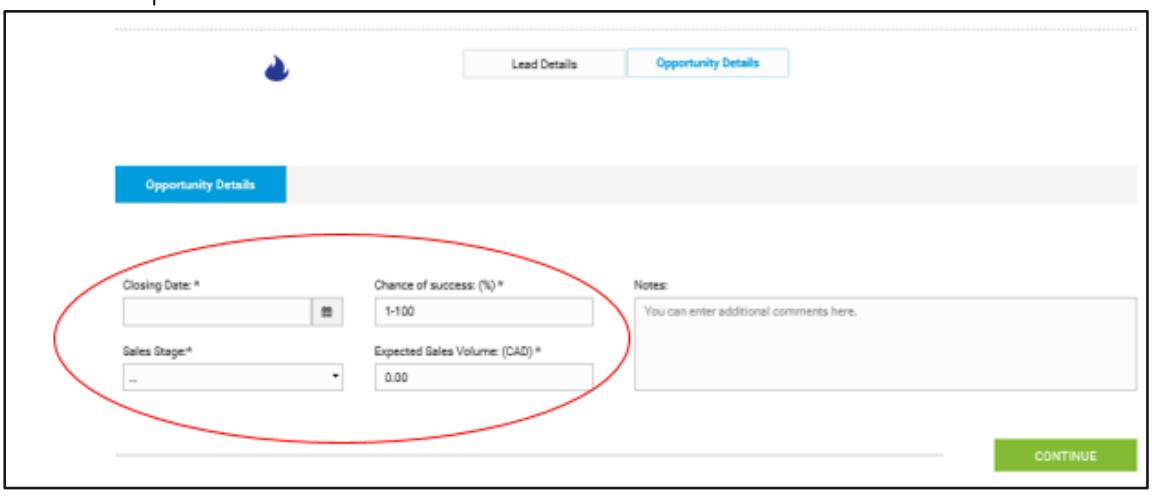
Incorrect sales rep
No immediate needs
Wrong sales rep / Redistribution to other Sales Rep

All other selections will close out the Lead.

9.4 Updating the Opportunity

Once the lead has been accepted, the Opportunity Details can be updated.

- Enter the expected Closing Date, Sales Stage, Chance of Success, Expected Sales Volume, and any necessary notes.
- Click on "Continue" – NOTE: all fields marked with a * must be completed before you can proceed.

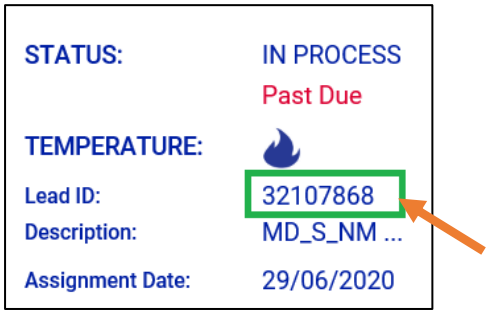


10 RFQ Portals

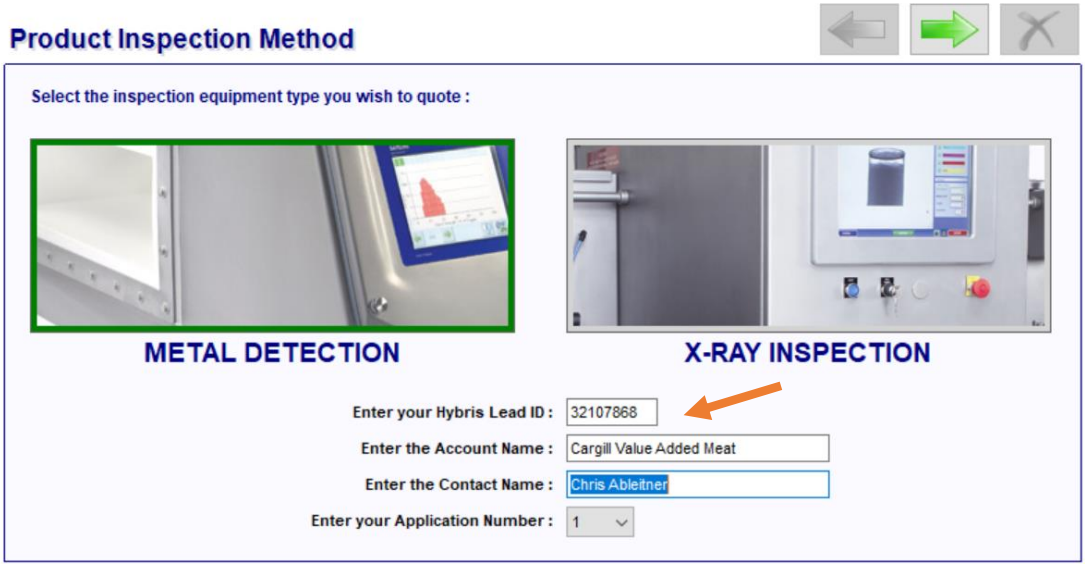
10.1 Completing the RFQs on MD/XR & CW/VI portals

Once the Opportunity has been created copy the Lead Id and open the appropriate RFQ Portal.

METAL DETECTION/XRAY RFQ PORTAL

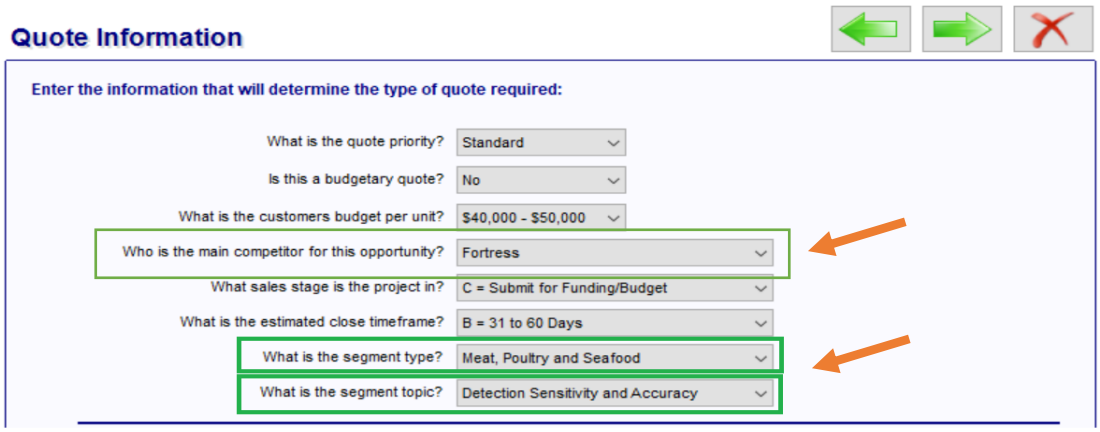


Complete the required information on the RFQ starting with the appropriate Lead Id

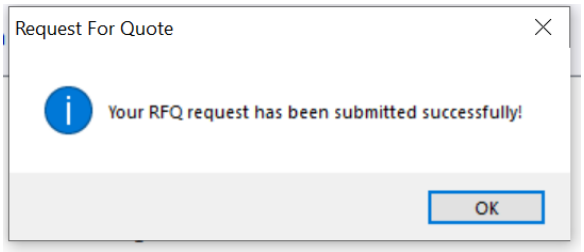


Complete the required Quote information including;

- *Competitor*
- *Segment Topic*
- *Segment Topic*



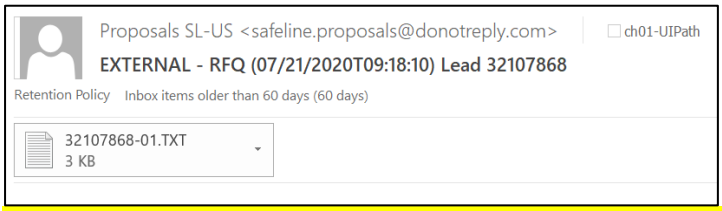
Complete all required information in portal; review RFQ and hit "SAP" – this will submit your RFQ to SAP, a pop up message will appear stating your RFQ request has been successfully submitted.



Once you have submitted your RFQ you should receive a confirmation email within 5-10min

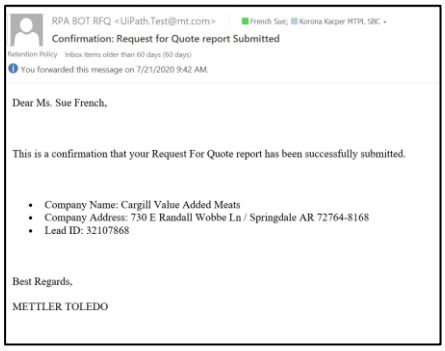
You will receive two emails:

1. Email with your completed RFQ attached



IMPORTANT NOTE: we suggest you keep this email and RFQ in automation is not successful; RFQ can be attached to Hybris manually

2. Email confirmation stating your request was:
    a. Successful


RPA BOT RFQ <UiPath.Test@mt.com>
Confirmation: Request for Quote report Submitted
You forwarded this message on 7/21/2020 9:42 AM.

Dear Ms. Sue French,

This is a confirmation that your Request For Quote report has been successfully submitted.

- Company Name: Cargill Value Added Meats
- Company Address: 730 E Randall Wobbe Ln / Springdale AR 72764-8168
- Lead ID: 32107868

Best Regards,

METTLER TOLEDO

    b. Unsuccessful

RPA BOT RFQ <UiPath.Test@mt.com>
Undeliverable: Request for Quote report

Dear Sarah FalckDP,

The Request For Quote report that you submitted cannot be matched with an existing lead. Please verify the Lead ID provided in your Request For Quote and try again. If the problem persists, contact Mettler-Toledo Inside Sales.

- Lead ID: 32107432

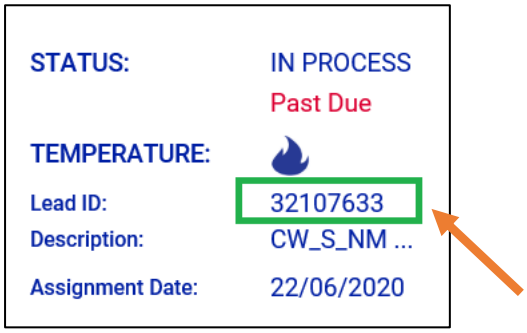
Best Regards,

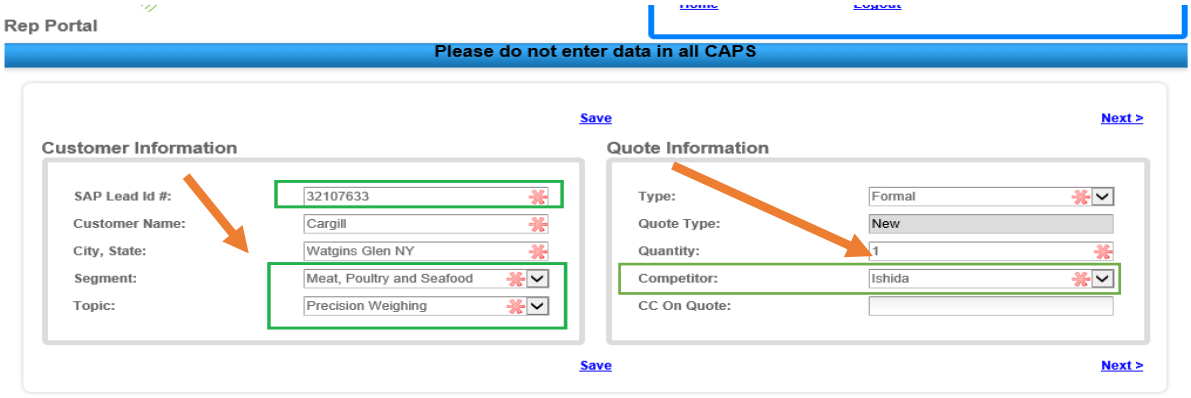
METTLER TOLEDO

If RFQ was successfully submitted the status of your lead will change to In "Process by MT" and RFQ file will be attached automatically.

<u>CHECKWEIGHER/VISION RFQ PORTAL</u>

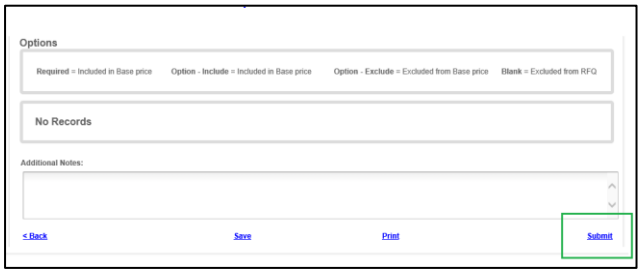
Complete the required information on the RFQ starting with the appropriate Lead Id

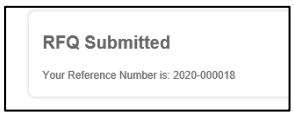




Complete the required Quote information including two new fields;
Segment Topic, Segment Topic and Competitor as noted in above screenshot.

Complete all required information in portal; review RFQ and hit "Submit" – this will submit your RFQ to SAP, a pop up message will appear stating your RFQ request has been submitted.





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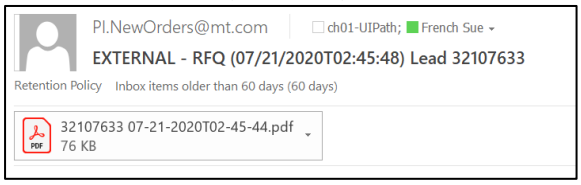
You will receive two emails:

1. Email with your completed RFQ attached



IMPORTANT NOTE: we suggest you keep this email and RFQ in automation is not successful; RFQ can be attached to Hybris manually

1. Email confirmation stating your request was:

    a. Successful:

RPA BOT RFQ <UiPath.Test@mt.com>
Confirmation: Request for Quote report Submitted

Dear Sarah FalckDP,

This is a confirmation that your Request For Quote report has been successfully submitted.

- Company Name: Test Account Jun 22 2
- Company Address: 123 Main St / El Paso TX 79835
- Lead ID: 32107633

Best Regards,

METTLER TOLEDO

b. Unsuccesful:

RPA BOT RFQ <UiPath.Test@mt.com>
Undeliverable: Request for Quote report

Dear Sarah FalckDP,

The Request For Quote report that you submitted cannot be matched with an existing lead. Please verify the Lead ID provided in your Request For Quote and try again. If the problem persists, contact Mettler-Toledo Inside Sales.

- Lead ID: 32107432

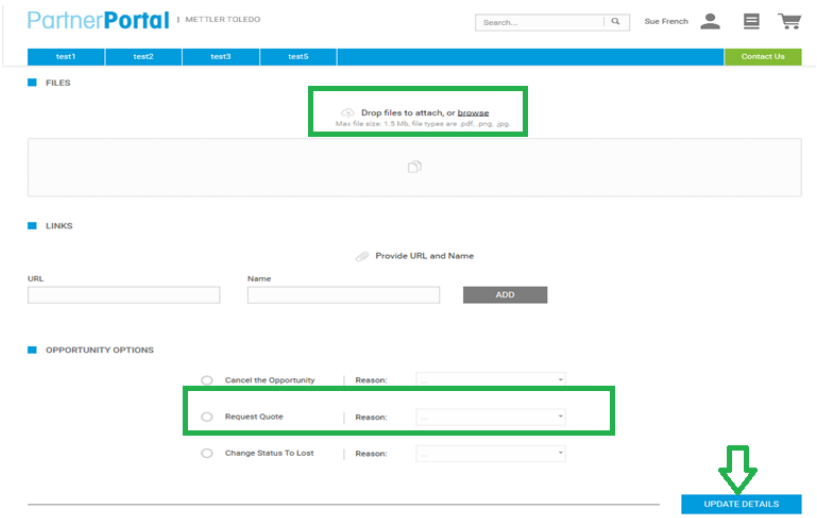
Best Regards,

METTLER TOLEDO

If RFQ was successfully submitted the status of your lead will change to In "Process by MT" and RFQ file will be attached automatically.

<u>If RFQ Automation fails:</u>

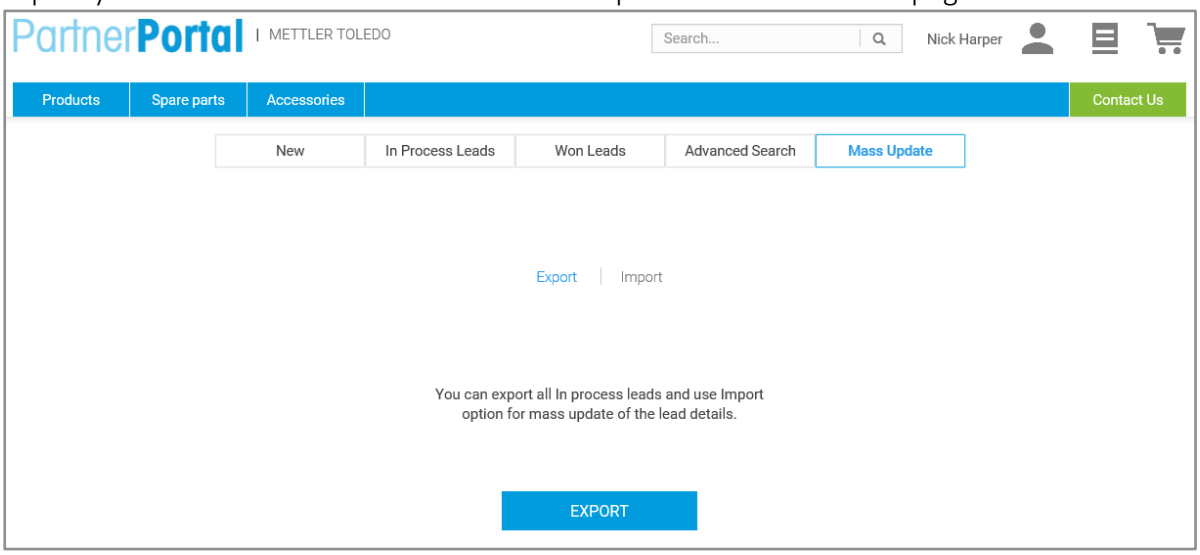
- User takes RFQ file from email
- User attaches RFQ file manually using the Drag/Drop or Browse feature
- User chooses "Request for Quote"
  - "For End Customer" – when we quote customer direct
  - "For Myself" – only used by LA Channel Partners when they are acting as distributor
- Click "Update Details"



11 CRM Mass Update

The PartnerPortal offers a Mass Update feature, which will allow you to export a .csv file of **all of your "In Process Leads" and import updates**. The coordinator must have accepted the leads first before the file can be exported.

Export your "In Process Leads" from the Mass Update tab of the Leads page.



NOTE: Depending on how many "In Process Leads" you have to export, the export could take from ten minutes up to one hour. When the file is ready, you will receive an email stating that your lead export file has been processed with a link back to the portal where your file can be downloaded and viewed. The email will also tell you for which account the export was triggered, which is helpful if you have access to multiple accounts.

Update the .csv file using valid values as described in the table on the next page.

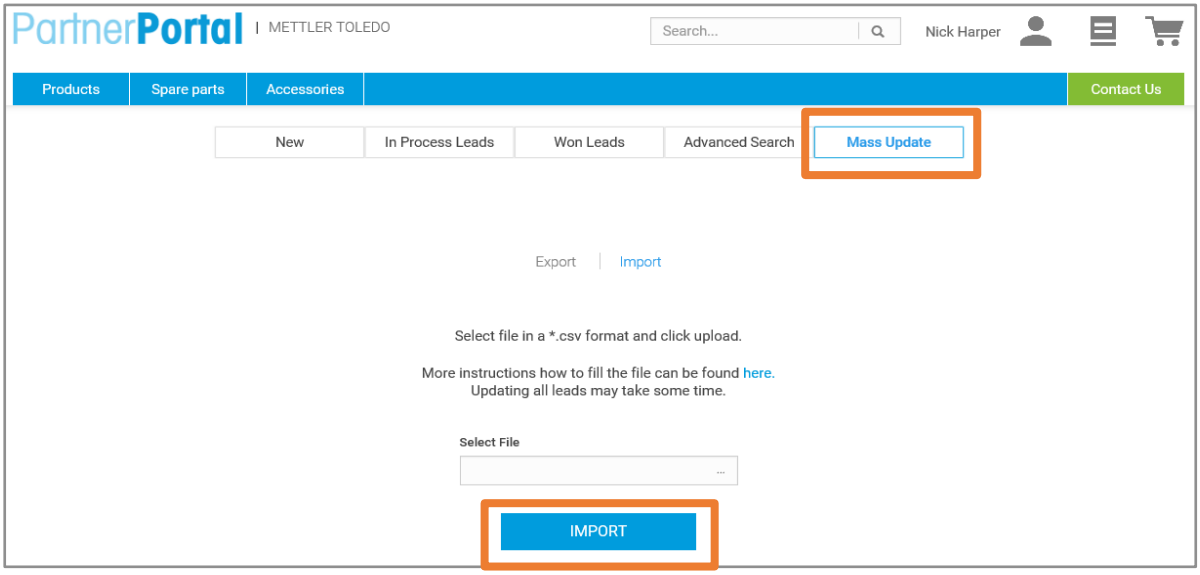
This is where you can pull an extract of leads from your own CRM (if applicable) and translate the details into this .csv file using the following data guidelines.

NOTE: any fields not listed in the table are not editable via Mass Lead Import. Even if you do make changes to these fields in the file (which you should not), the changes will not be reflected in the import. This includes the fields: Lead Description, Company, Customer Contact, Customer Contact Mobile Phone, Temperature, Product, SBU, Sales Rep, and Assigned to.

Field name	Allowed values for the field	Required
Lead ID	8-digit number	Yes
Closing Date	Date in the format MM/DD/YYYY ***Must be a date in the future**	Yes
Sales Stage	**Possible values:** Analyze Needs Demo MT Value Develop Solution Close Sale	Yes
Chance of Success	Any full number in range 0-100, without decimal point.	Yes
Expected Sales Volume Amount	Any full number.	Yes
Status	**Possible values:** Won Lost Cancelled	Yes, if Reason is given.
Reason	**Values when Won:** Loyal to us Best Technical Solution Best Price/Performance Ratio Short Lead Time **Values when Lost:** Loyal to Competitor Better Solution from Competitor Not Best Price Lead time too long Previous negative experience with MT **Values when Cancelled:** Stopped by MT.No solution available Stopped by customer.No project Duplicate/moved/new opportunity	Yes, if Status is given.
Additional Notes	Free text (limited to 500 characters, including spaces)	No

Save your file as a .csv and import it on the Mass Update tab of the Leads page.

On the Mass Update tab of the Leads page, click on "Import", select your file using the "Select File" button, and then click the "Import" button to check for errors.

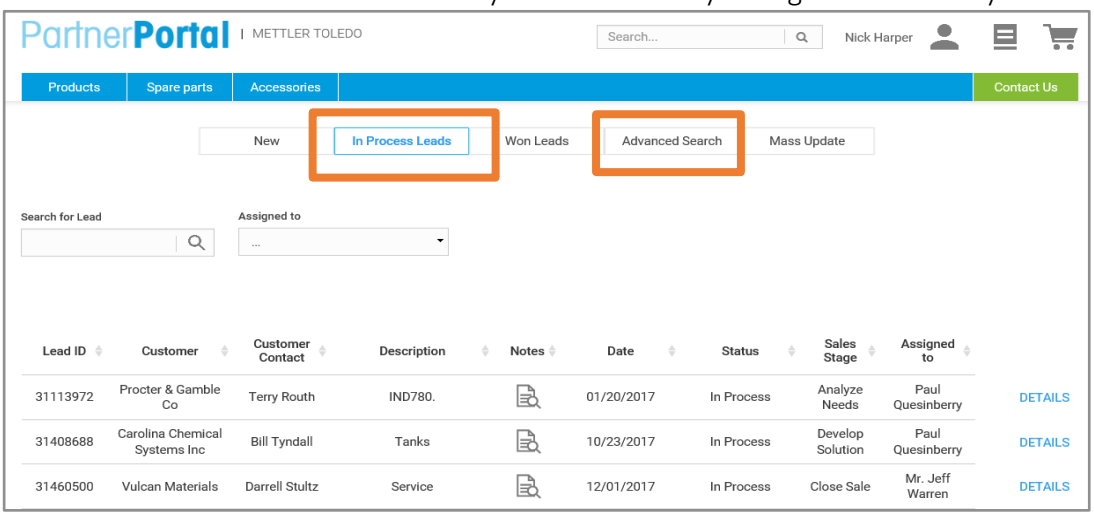


Depending on how many leads are in your file, the import could take from ten minutes up to one hour. When the file is ready, you will receive an email stating that your lead import file has been processed with a link back to the portal where your file can be downloaded and viewed.

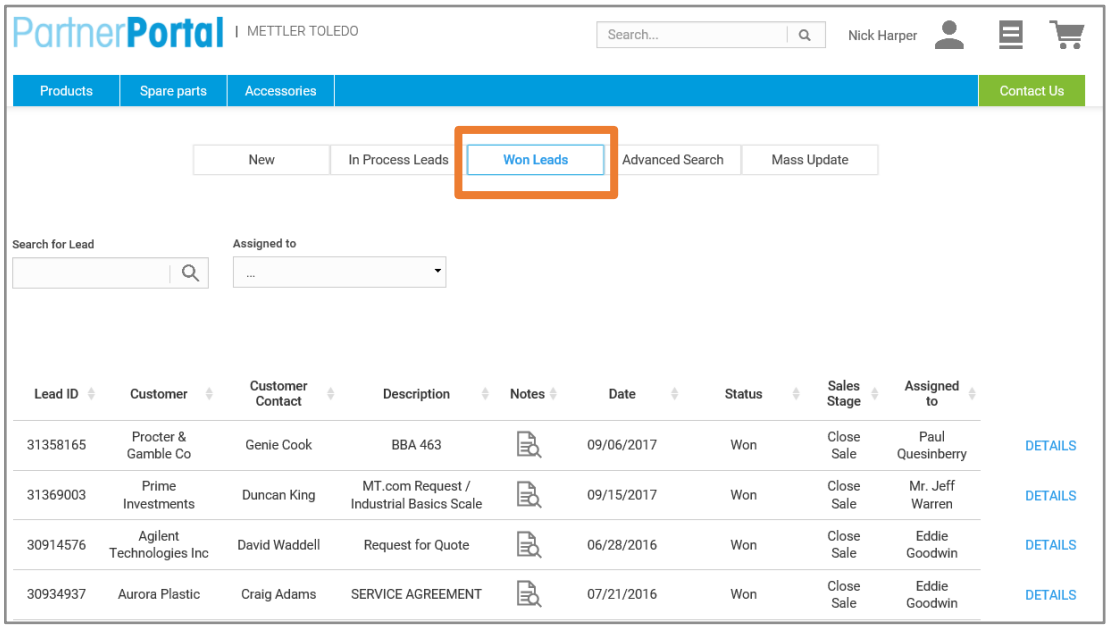
When viewing the file, you will see a new column "Import_Status". In that column, you can see whether each lead was successfully updated.

For those leads that were not successfully updated, the "Import_Status" column will tell you the source of the error. Simply make the necessary changes directly on that row of the import file and then re-import the file on the portal (repeat step 3). As an option to make it easier, you can also remove the successful leads from the file before you re-import it (but this is not required to do).

If any leads still require manual changes, search for your lead under the "In Process Leads" tab or "Advanced Search" and you can make any changes as necessary.



For those leads which are "Won", you will see that they have been moved to the "Won Leads" tab.

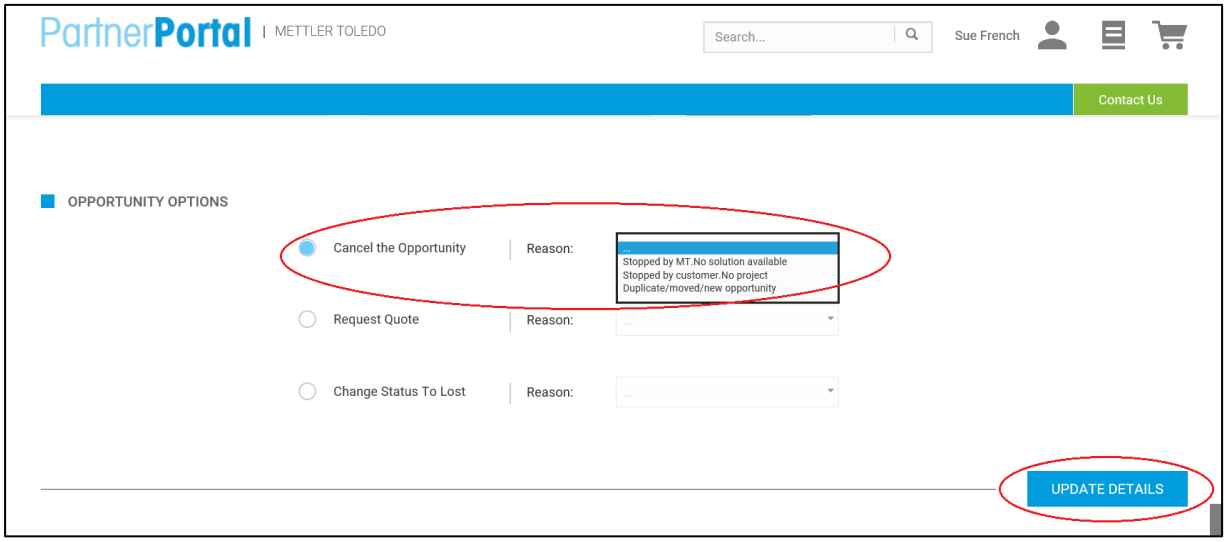


12 Closing Leads

To close a lead, as lost, or no longer active in the PartnerPortal, go to the In Process Leads and select the lead you need to close.

NOTE: Only select "Cancel the Opportunity" for leads that are now inactive when the project is stopped by customer or stopped by MT.

- Scroll to the bottom of the lead to the "Opportunity Options" section and click the radio dial next to the status "Cancel the Opportunity" or "Change Status to Lost",
- Select a respective reason code.
- Click "Update Details" to close the lead.
- The lead is now closed.

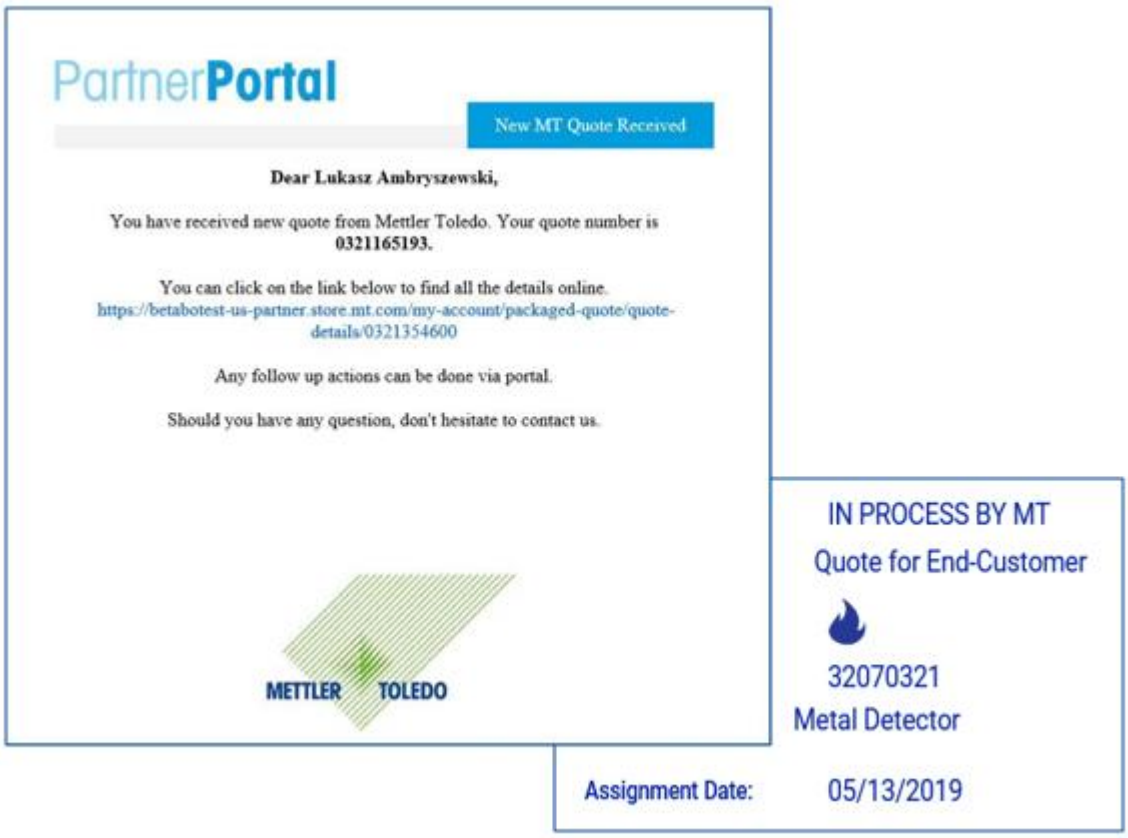


13 Request a Quote

- To request a quote for a lead scroll to the bottom of the lead to the "Opportunity Options" section and click the radio button next to the status "Request Quote"
- Select the reason code: "Quote for End-Customer"

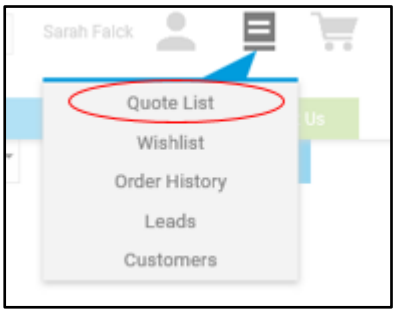
  IMPORTANT: "Quote to End Customer" is to be used 100% in the US.
  For **Latin America** if representing as a distributor (For Myself) or CP (For End Customer)
- Verify the sales amount is correct and click "Update Details"
- Click "Update Details"

The lead's status will update from "In Process" to "In Process by MT."
The quote request will now be directed to someone from the MT inside team to create the quote.
You will receive an email notification when the quote is ready in the PartnerPortal.



14 Access the Quote List

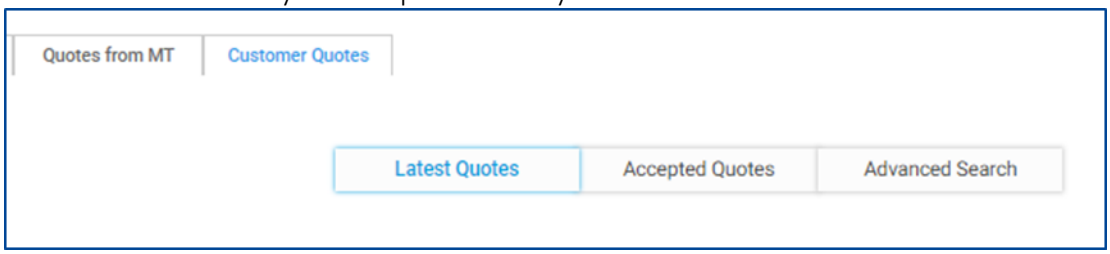
To access your Quote List, click on the list icon in the right top corner of your home page and select Quote List.



From the Quote List, please select the tab Customer Quotes. This will display quotes you requested for the end-customer.

Three tabs will display within your Customer Quotes: Latest Quotes, Accepted Quotes, and Advanced Search.

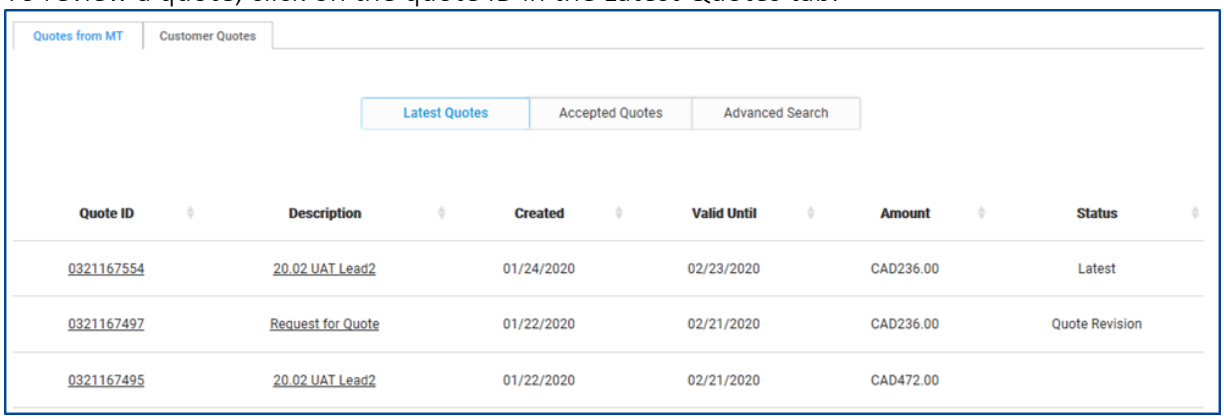
NOTE: Any quotes that have not yet been accepted will display under the Latest Quotes tab. This includes brand new quotes, requested revisions, and order requests that have not yet been processed by our inside team.



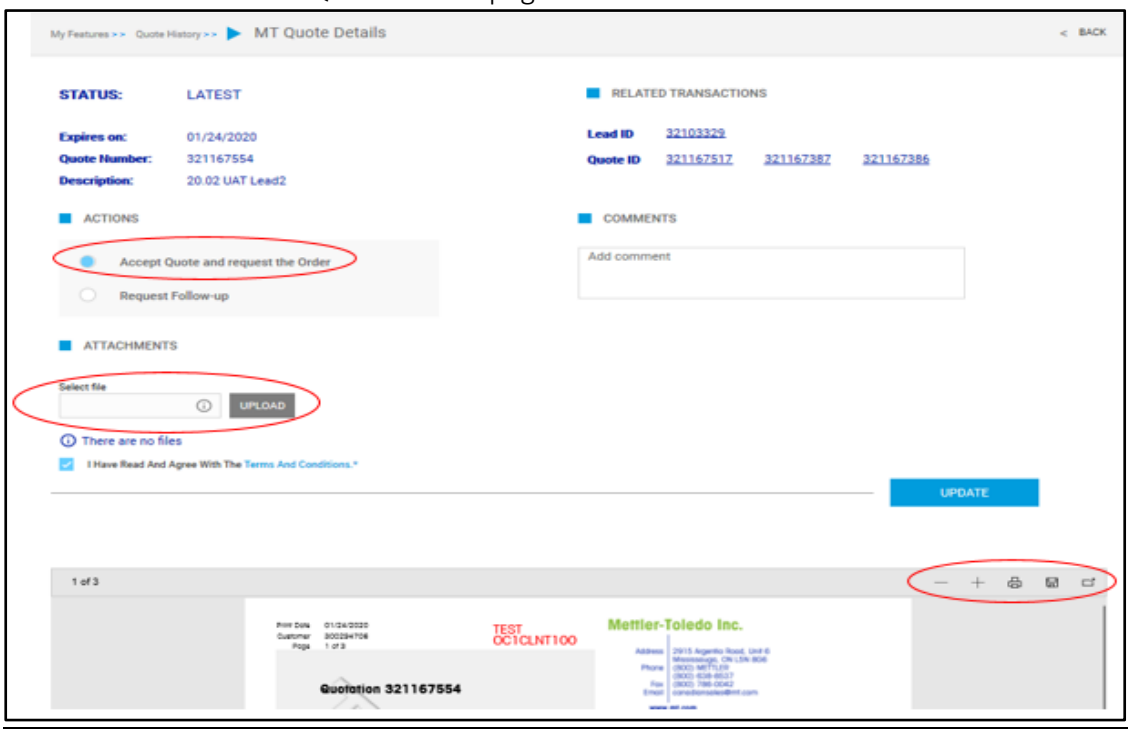
Users can also click straight into the Quote Details page from URL included in the email notification, or by clicking on the Quote ID linked to the associated Lead Details page.

15 Accept Quote or Request a Revision

To review a quote, click on the quote ID in the Latest Quotes tab.



This will redirect to the Quote Details page.



- Review the quote ID, date of expiration, description, and related transactions (including the original lead ID and any previous quotes requested from the lead)
- Scroll down the Quote Details page to view, download, or print the quote PDF

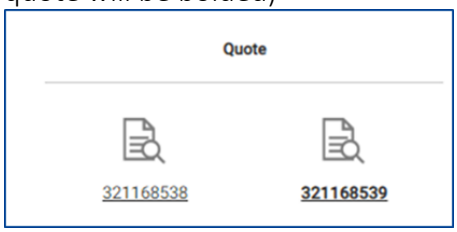
15.1 Request a Quote Revision

- Locate the lead or quote in question
- On the Quote Details page, select "Request Follow-up" in the Actions section of the page
- Add the appropriate revision comments, attach additional pictures, videos (not submitted with original RFQ) if applicable
- Click "Update"

- After updating, you will be redirected to the associated Lead Details page

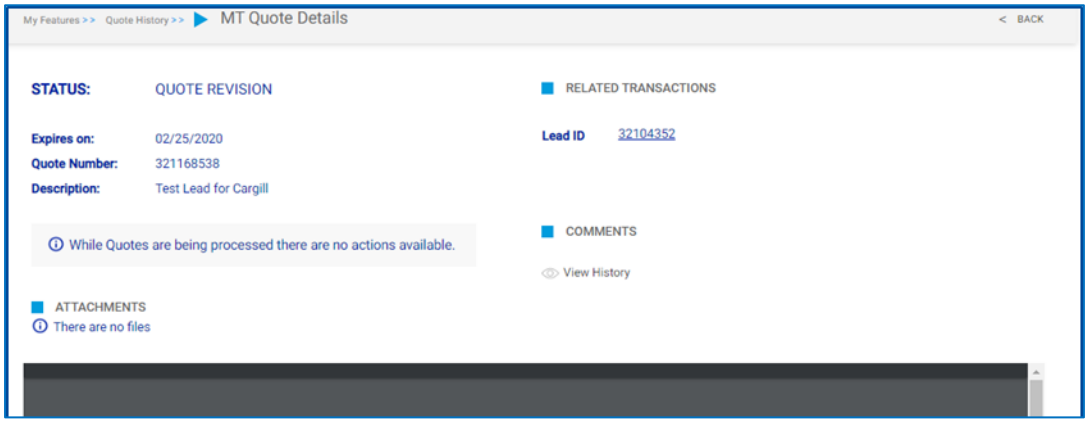
The request for revision will be sent to the Inside Sales team to generate a new quote. Once the new quote is ready to view in the PartnerPortal, you will receive a new email notification.

The new quote will have an entirely new Quote ID, and you can find it in the Latest tab. You will also find the new quote ID linked on the associated Lead Details page. (The most recent quote will be bolded)



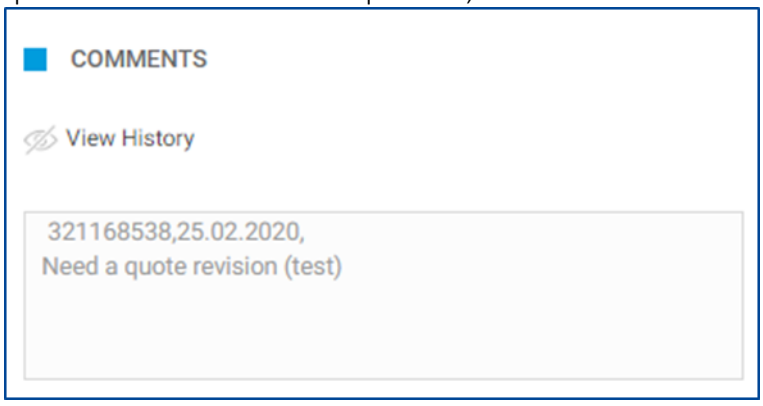
15.1.1 Editing a Quote Revisions

After requesting a quote revision, you will not be able to edit anything on the Quote Details page for that Quote ID. Instead, you will view a message that states, "While Quotes are being processed there are no actions available."



15.1.2 View Past Comments on a Quote

On the Quote Details page, click "View History" to view past comments sent back on the quote. This will include the quote ID, the date of the comment, and the full comment.



16 Accept the Quote

To accept a quote continue to send the PO and order docs to orders email as is current process

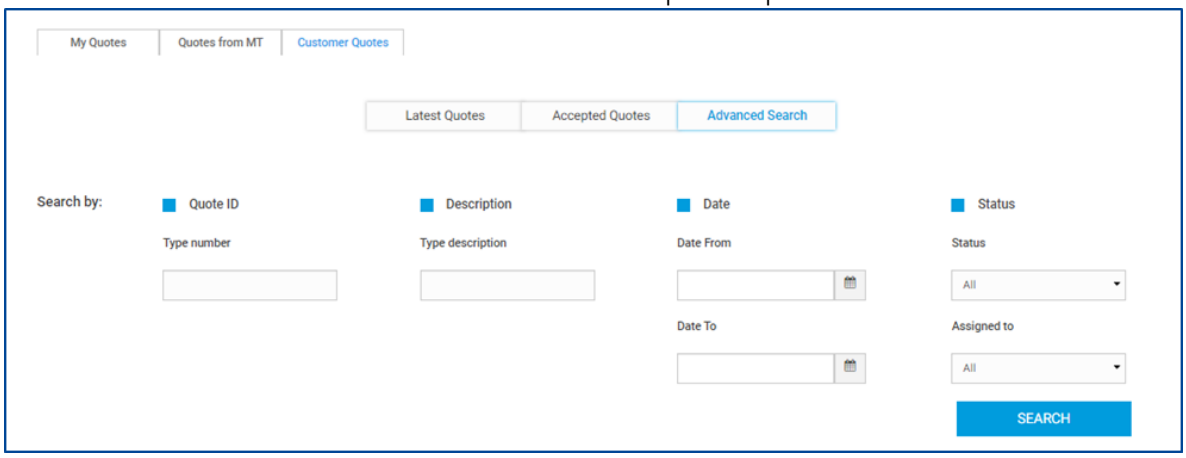
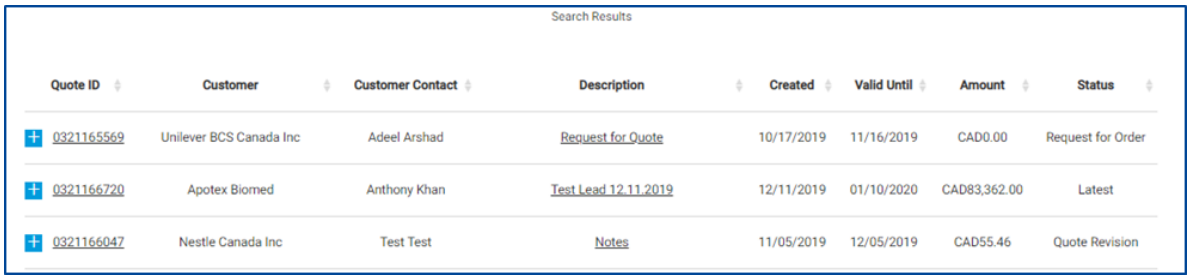
Follow the process just as we do it today

Send PO and all Order Docs to PI.NewOrders@mt.com

17 Quote Advanced Search feature

How do I use the Advanced Search to search for a specific quote or list of quote IDs?

Use the Advanced Search tab to search for specific quote IDs.



- Search by quote ID, description, a range of dates, quote status, and/or the sales rep the lead/quote is assigned to
- Click "Search" to load results