

**[CELEDON
PARTNERS]**

Port Manager™

Microsoft Dynamics CRM for Ports

February 2015

Overview

Celedon Partners Port Manager™ encapsulates the functionality of many port related processes into an easy to learn and easy to use tool. The solution leverages all the capabilities in the Dynamics CRM platform. Because of this foundation, Port Manager gets your project launched quickly and without the need to pay for the development of common features.

Celedon Partners has leveraged our deep public sector expertise as well as port management knowledge to focus on the key requirements common to Ports. With Dynamics CRM as the foundation system, Port Manager is designed to be extended to fix your exact needs and requirements. All features and processes were thoughtfully designed to provide value out of the box as well as be able to configure and customize to meet the unique needs of your organization.

Celedon's Port Manager provides built in functionality to solve common Port needs, including:

- Lease Management
- Sales Management
- Case Management
- Contact Management
- Customer Management
- Data Management
- Marketing System
- Notification Systems
- Reports
- Mapping
- Offline
- Security
- External Portal
- Extensible

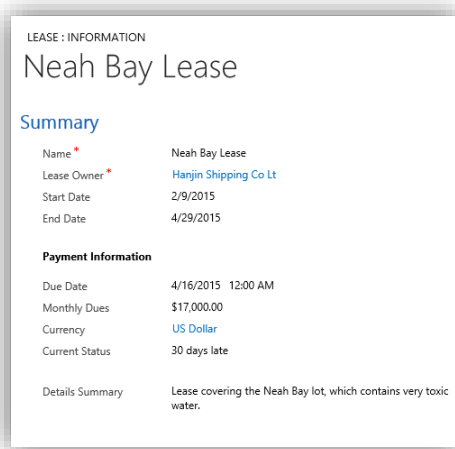
In addition, by leveraging Dynamics CRM, the solution also provides:

- Outlook Integration
- Mobile Clients
- Data Management and Integration Framework
- Workflow and Process Management
- Security
- Social Integration
- And more

Celedon Port Manager™ Features

❖ Lease Management

- Map lease space to customers. Detailed lot searching based on key attributes. Quickly view available lots and lots becoming available.
- Proactive notifications of lease availability, or upcoming openings.
- Turnkey lease extensions.



LEASE : INFORMATION

Neah Bay Lease

Summary

Name *	Neah Bay Lease
Lease Owner *	Hanjin Shipping Co Lt
Start Date	2/9/2015
End Date	4/29/2015

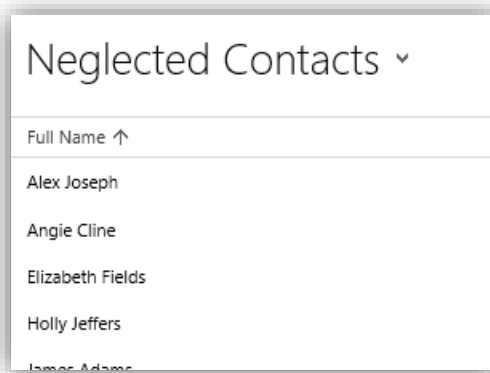
Payment Information

Due Date	4/16/2015 12:00 AM
Monthly Dues	\$17,000.00
Currency	US Dollar
Current Status	30 days late

Details Summary Lease covering the Neah Bay lot, which contains very toxic water.

❖ Sales

- Details around all types of customers, tenants, vendors, lessees etc. Mobile access to all account and contacts. Tailored search to enable quick finding of key data.
- Complete contact management and activity tracking including all phone and email interactions.



Neglected Contacts ▾

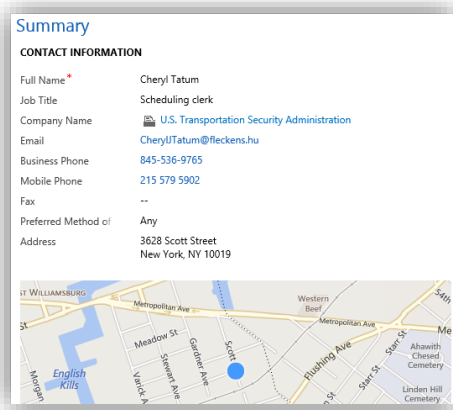
Full Name ↑
Alex Joseph
Angie Cline
Elizabeth Fields
Holly Jeffers
James Adams

❖ Case Management

- Open and route cases based on typical or customized rules.
- Enforce SLAs and entitlements.
- Track similar cases with the same agents to ensure fast and reliable resolution.

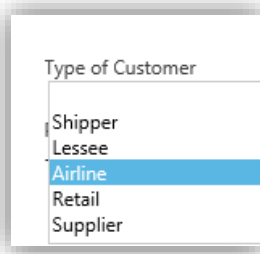
❖ Contact Management

- Tracks contacts and contact history. Links contacts to notification lists for quick communications and sales efforts.
- Using Outlook's built in contact creation methods, you can easily import contacts via business cards or manual entry for synchronizing with CRM.
- Customized search views and filters to easily find specific contacts or accounts based on whatever data points are desired.
- Contacts and accounts can be created and synchronized from CRM or Outlook.
- Notes are audited and time/date stamped as well as notifying who created them



❖ Customer Management

- Details customers with information from numerous data sources. Tracks airlines, shipping lines as well as other vendors with specific data points.
- Customers and contacts allow for categorizing and classification based on type as well as custom options.

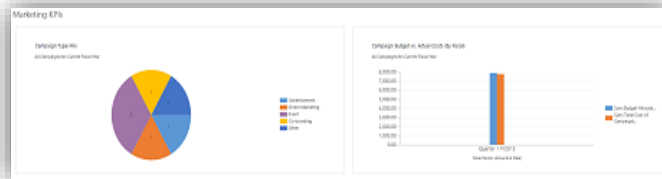


❖ Data Management

- All records are checked for duplicates and rules can be added to define what a duplicate is.
- All fields are searchable, including contents of notes and emails.
- All data can be shown as "My data" where only the records owned by the person viewing them is displayed for ease of use.

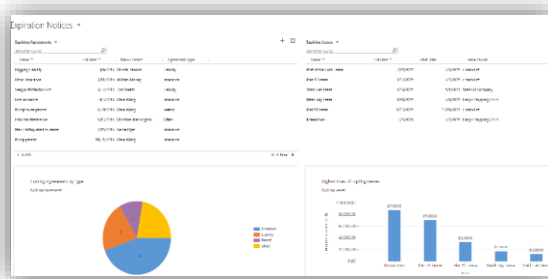
❖ Marketing

- Dynamic marketing lists allow you to create a list of all contacts with a certain title, or in a certain vicinity and send them emails based on their locations.
- Static marketing lists allow you to create a list of just the contacts or accounts you want to contact and edit the list as much as you want as your needs change.
- Workflows allow for list creation, approval, and sign off processes.
- Lists can group contacts and accounts in any number of ways desired.



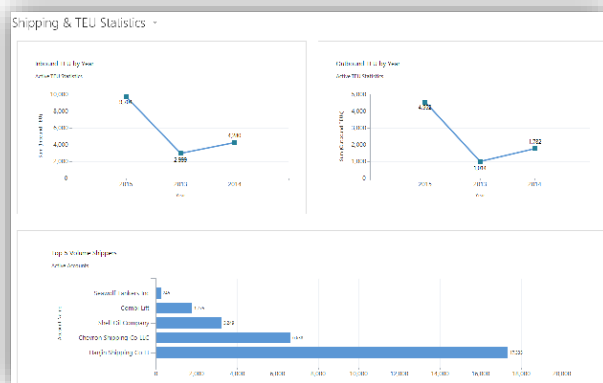
❖ Notifications

- Lease expiration notifications.
- New account notifications.
- Delay / disaster notifications.
- Configurable notifications based on your specific needs.



❖ Reports

- TEU dashboard tracks container space by lot, customer and lease.
- Case management and activity reports track KPIs of customer satisfaction and overall account relationships.
- Work with accounts or contacts that have been neglected by leveraging the neglected contact view.



❖ Environmental Impact

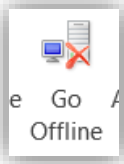
- Easily track campaigns based around environmental impact

❖ Mapping

- Track accounts and contacts on a map. Easily locate customers in your vicinity or see a heat map based on configurable options.

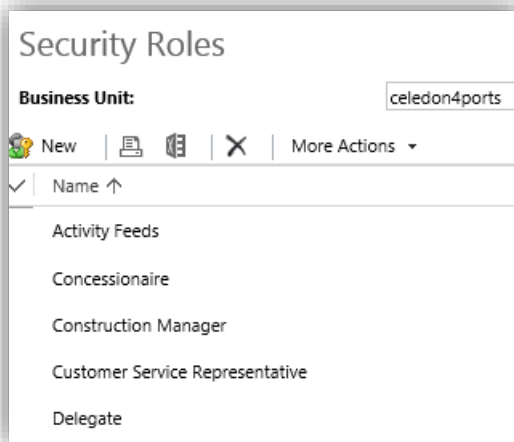
❖ Offline use

- All functionality of Port Manager is available on or offline using the Outlook connector for Dynamics CRM.



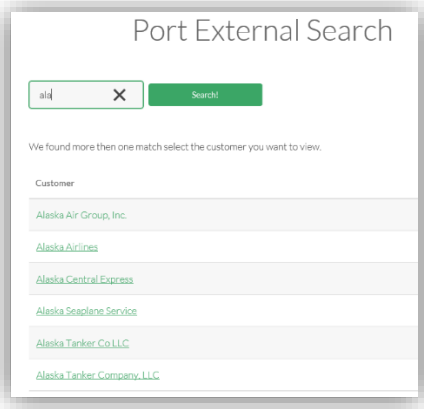
❖ Security

- Notes and all data are stored securely in Port Manager. Configurations to security can control who has access to read, update or delete anything based on a wide array of constraints.
- You can control who sees each record and who sees each field.



❖ External Portal

- Ability to expose data to other state and local agencies, to customers, other ports or any other groups that need access to your data.



❖ Extensible

- Celedon Partners can extend Port Manager to only cover some of these functions, or to add new functionality.
- Built to allow for easy integrations into 3rd party email systems, ERP systems or other external tools.

Microsoft Dynamics CRM Features

❖ Outlook Integration

- Track emails, appointments and tasks with one click
- All CRM tasks can be performed in Outlook

❖ Mobile

- Mobile Phone applications for iPhones, Windows Phones and Android Phones that update based on CRM, no need to manage a separate UI
- Leverages your phone or tablets dictation abilities to dictate notes directly into CRM.

❖ Office Integration

- Excel integration, supports dynamic spread sheets and pivot tables that update from inside Excel.
- Word / Outlook full mail merge support out of the box.
- SharePoint Integration out of the box

❖ Data

- Supports importing data via xml, csv or text files.
- All records support auditing of who created or updated each field and when the update occurred.



- Allows ad-hoc relationships, where you can link any objects together on the fly.

❖ Localization / Globalization

- MSCRM is built to support multiple currencies, languages, and localized formats and time zones to allow users access from around the globe.

❖ Security

- Role or Hierarchical based security models. Security can be enforced at an organization level, business unit level, record level or even field level.

❖ Reporting

- Point and click charting and dash boarding; simple UI allows any user to create their own with minimal training.
- Charts can have many pivot points, and dashboards can support many charts, many lists, and custom components as well as Iframes
- Out of the box integration with SSRS for more complex reports

❖ Social

- Integrated with social feeds, Facebook, LinkedIn etc. allows users to respond and react to incoming social items
- Pulls in data from many online sources to enrich your customer data

❖ Offline

- Full offline support – all custom code and functionality works offline in Outlook. Concurrency checking is auto managed when user gets back online

❖ Workflow

- Built on Windows Workflow Foundation, Microsoft enterprise workflow engine, allows non developers to declaratively design complex workflows like “When a field changes wait 2 weeks or until another field changes then do some action

❖ Marketing

- Campaign management – dynamic marketing lists (All customers in WA State), static marketing list (All prospects from a certain tradeshow), ability to bulk email, manage responses, and respect do not contact lists. End to end campaign management, track financials for a campaign, and ROI on campaigns

❖ Sales

- Process Driven UI – ability to guide users through any process you want without code



About Celedon Partners

We provide high quality project leadership and technical resources to mid-market and enterprise customers without the overhead, complexity, and high cost of large scale consulting firms. Celedon Partners team has an extensive track record of developing public sector CRM extensions, productions and customizations. Additionally, Celedon Partners provides unique and highly adoptable user experiences.

For more information contact:

BRETT CAMPBELL

SR. DIRECTOR, BUSINESS DEVELOPMENT

425.443.1551

brettc@celedonpartners.com

MARY LOTHARIUS

SR. DIRECTOR, SOLUTION OFFERINGS

443.267.6837

mary.lotharius@celedonpartners.com

