CRM Updates and Levy Portal

Sea Fish Industry Authority
Invitation to Tender
(Open Procedure)

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Completed tenders by e-mail by the deadline (5pm on Monday 11th August 2025) to:

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1. Introduction

Seafish is a non-departmental public body (NDPB) set up as part of the Fisheries Act 1981 to support the seafood industry in the UK. Full information on the legislation is available on the [Gov.uk website](#). There are many different teams within the organisation, including trade and regulation, Marketing campaigns for the fishing industry (including Seafood for Life), Safety and training, responsible sourcing, insight and research and Levy. Seafish is not for profit and would be classed similarly to a "trade association" as we deal with memberships, deliver training and offer support for the fishing industry. We are funded in majority by the Levy that is charged on the first sale of fish landed or imported into the UK.

LEVY

In its simplest term, Levy is due on the first purchase of fish in the UK, which is collected by Seafish.

Levy is calculated on the weight of fish purchased and rates are set dependant on the species and whether it is a whole fish, a fillet or just partial fish content.

Levy is calculated and compiled by the levy payer and the amount is submitted to us on a Submission form

*Submission forms are due in varying frequencies (depending how much is due) – these are Weekly, Monthly, Quarterly or Annually (it is estimated there are aprox **300-350** submissions each month in total)*

Once submitted, payment is due immediately.

Checks are required to ensure we receive the timely submissions and the timely payments for each submission

Levy auditors visit Levy payers on a periodical basis to ensure that the records they keep match the submissions made. Details of who is due an audit are kept on the company record.

Levy audits are recorded in full on the CRM with the outcome (overpayment/underpayment or no change) and notes kept in the levy audit visit record.

2. Background

a. The project

Seafish have been using Microsoft Dynamics 365 CRM for a number of years for their customer relationship database, initially with an on-prem instance and now in the cloud. We are looking to rebuild the online portal for Levy submissions (which has not been in use for aprox 4 years) and would like to review the current CRM processes and build in more automation which will link with the portal. The organisation has aprox 85 employees,

however there are only approximately 10 regular users of the CRM so we are hoping these changes will also support engagement and user adoption across the wider company.

The Levy information has historically been held separately to the rest of the information in CRM, so only Levy team and other select individuals could view. However after review it has been decided this is no longer necessary as this has caused duplicate companies on the CRM and contributed to slow take-up by non-levy teams. Click Dimensions is used by the marketing team within CRM.

Currently the Levy team are the most prominent users of the CRM due to the audits, submissions, payments and notes being held within the CRM. This works well for the Levy team and although there are tweaks and changes that are required, it has been sufficient for every day tasks. The Levy received by levy payers enables the company to bring in an income and is therefore business critical to the organisation. All work should be completed with minimal "down time" of the system as daily access is required.

The CRM is used by the Levy team for supporting the following tasks:

Levy Submissions – similar to an invoice record, uses dates from-to, invoice date, product lines (**Levy Details)** and calculates costings with VAT and agency fees if required. Has a link to payment allocations which will alter the amount still to pay / mark as paid

Payments – The finance system is not connected fully, instead an import of the bank payments are imported into the CRM each day (manually), linking to a company using the "Levy Payer Ref" which is added in to the csv before importing to identify where the payment record should be. The payment info has transaction date, transaction line, company, levy payer ref, amount.

Payment Allocations – used to allocate the payment against the correct submission, will change the status of a submission to paid if the allocation pays the balance in full.

Product Master File – product list – consists of 26 products which rarely change in details or price. The price is fixed per kg and the kg is entered at the point of submission line to calculate the total.

Day book - a daybook is created for financial accounting, this is the only type of export from CRM into the finance system (Access) – there currently is no live API and information is uploaded as a total. The daybook provides the breakdown of allocations by levy payer which is held on CRM.

Levy Audit Visit – Activity type log used to log details of a visit and the notes and calculations recorded. Manual fields with no automation.

Legal Dispute – used to record any missing submissions for a particular period for each company. These are kept open until we receive the submission

Legal Action – *used to record details of any cases which have legal action (court action) raised and ongoing*

Levy Notes – *an activity log recording notes for a particular customer.*

Businesses tab - *for info and contacts – additional fields have been added to facilitate the levy auditors review of a company (mainly using free text, check boxes and a number of financial fields)*

Contacts tab – *used to log basic contact information, not many additional fields added*

Enquiries – *Used to log enquiries (used more widely than just the Levy team)*

Activities – *not used but in the system, has some records against it*

Horizon Observations – *a bespoke activity page with fields for people to log information – used more widely than the Levy team and owned by a non-levy member of Seafish*

3. **Objectives**

   a. **Scope of services** – *Products in scope of the project work and service will initially consist of Microsoft - Dynamics 365 CRM (and associated power platform solutions), API support for Access (finance software), Click Dimensions, Azure hosting (and relevant MS environment hosting services), Microsoft software links (MS365, outlook, Sharepoint)*

   b. **Requirements -** *All companies submitting a tender will be required to meet our minimum Cyber Security requirements. Full details can be provided.*

   c. **Outputs and milestone** – *Expected outputs (milestones marked with *) will include review and recommendation of best value licencing/hosting options*, development and stabilisation of the current Dynamics CRM instance*, including reviewing current processes and implementing automation where available, Producing the Levy Portal* according to the specifications below, ensuring that all connected apps and API's continue to work during and after development of the CRM, partner support during implementation, continuing partner support and training after delivery of projects.*

   d. **Timetable of delivery** – *Please list average expected timescale, including estimated timings and maximum lead time for delivery of project works (CRM Amendments and Levy portal), plus SLA's for ad-hoc and support work. This work is expected to start on 18 August 2025. If you cannot commit to starting on this date please clarify your earliest start time with dates in the tender.*

   e. **Fees and costs** – *Please breakdown by list as per Appendix 2*

The requirements of the project will include:

Review of licences and licence types

Review of the hosting package and sandbox options

Review of current CRM and the existing CRM setup, work with current system (we are not interested in moving away from Microsoft Dynamics for either the CRM or the Portal) to enhance the current system and automate tasks to increase productivity.

Review other aspects of the CRM to ensure these are able to function with the changes required – this includes Click Dimensions and a horizon scanning activity log.

Review and implement the changes required to automate the Levy section and develop the online portal to enable customers to log on and self-submit the returns when due (various frequencies – weekly, monthly, quarterly and annually)

Develop and Implement the Levy portal

Create dynamic dashboards for oversight of activities (submissions, payments, audits, legal disputes etc)

Offer full training and support during the implementation and development

Offer a support partnership service with SLA's for ongoing development and issues post-project

*Specific requirements for the Levy Portal implementation which have already been identified are listed in the table below – this is a list of **identified** requirements but is not exhaustive and may be subject to change/review with discussions:*

CRM area:	Requirements
Licences	Software licence review, to include review of data, storage and sandbox
CRM	Business details (names and addresses etc to be re-organised)
CRM	AUTOMATION - Auto-create submission template - to email customer one created as reminder.
CRM	Invoice / debt chasing workflow for overdue invoices to be emailed periodically until paid
CRM	roll-up statement view showing o/s invoices and unallocated payments - to email monthly
CRM	Invoice "email" button to automatically email customer with email field for additional "levy" email address
Portal Login	Email to alert Seafish to new levy registration
Portal Login	Welcome email to go from levy@ and say your auditor is ...
Portal Login	Reset password for customers
Portal Home	menu moved, brand refresh with links to website pages, news, social media etc

Portal Home	*Company contact to have the ability to review multiple accounts (where they are the Levy portal admin)*
Portal Home	*View of outstanding submissions / payments availble to portal user*
Portal Home	*To be able to ask a question / contact us*
Submission	*Ability to upload spreadsheet which will copy into the CRM submission form (fields mapped)*
Submission	*Product description changed and country of origin to be added but optional to start with (fields with lookups)*
Submission	*Save options - need to save document automatically as customer is working. to have ability to add info at a later date (eg PO number)*
Submission	*invoices downloadable from portal*

4. Contract management

For any queries please contact ruth.shann@seafish.co.uk

5. Awarding Criteria

a. *See Appendix 1 for Evaluation Matrix*

6. Tender Process Timetable

The Tender will be open for 1 month (see dates below). We will then review the received tenders and will make a decision quckly after the closing date. Work to be commenced the start of the following week (or immediately upon contract award where possible). Please ensure the timescales are included in the tender and can be met.

Closing date: 11 August 2025 at 5pm

Tender Evaluation date(s): 12-13 August 2025

Award date: 13 August 2025

Contract Required start date: Monday 18 August 2025

7. Submission of Tenders

a. Please see Appendix 2 for example tender submission guidelines.

8. Recovery of Costs

a. An applicant is not entitled to claim from Seafish any costs or expenses incurred in preparing the tender document whether or not it is successful.

APPENDIX 1: Example Criteria for the evaluation of tenders

Tenders will be assessed for their value-for-money, and in the interest of ascertaining the highest level of transparency, fairness and competition the following evaluation matrix will be used to score each tender. If you wish to seek clarification on any aspect of the evaluation matrix then please contact contract management.

Evaluation Matrix

Award Criteria	Weighting (%)
Solution proposal suitability, ability to adapt solution to meet our needs	**30**
Relevant experience in CRM type projects and support	**25**
Value for money / pricing for Software and support	**20**
Project delivery timescales	**15**
Future-proofing credibility	**10**

APPENDIX 2: Example Guidance for tender submission
The following information should be included in a response:

- Name of the tenderer(s), status in the company, and name of person for further contact (if different);

- A brief statement (in no more than 500 words) detailing an understanding and interpretation of the purpose, specific objectives and scope of the project;

- Details of the proposed methodologies and outline costs should be no longer than 10 pages;

- Details of previous research experience relevant to the current application;

- Contact details for referees in relation to this work;

- A clear statement of the tender price and costs under the following subheadings for each stage of the project:

o Portal Delivery	o CRM Stability/automation work
o Ongoing Partner support information and costs	o Licencing costs
o VAT where applicable	o Total costs

Seafish will be unable to reclaim VAT, therefore please ensure to state VAT when applicable.

We will post responses to queries on our Seafish website

There will be one Q&A session with screen sharing (to clarify questions and current CRM setup) held each week whilst the tender is open, please email ruth.shann@seafish.co.uk to book on to the session.

APPENDIX 3: Screenshots from Current CRM