

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

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Training Manual
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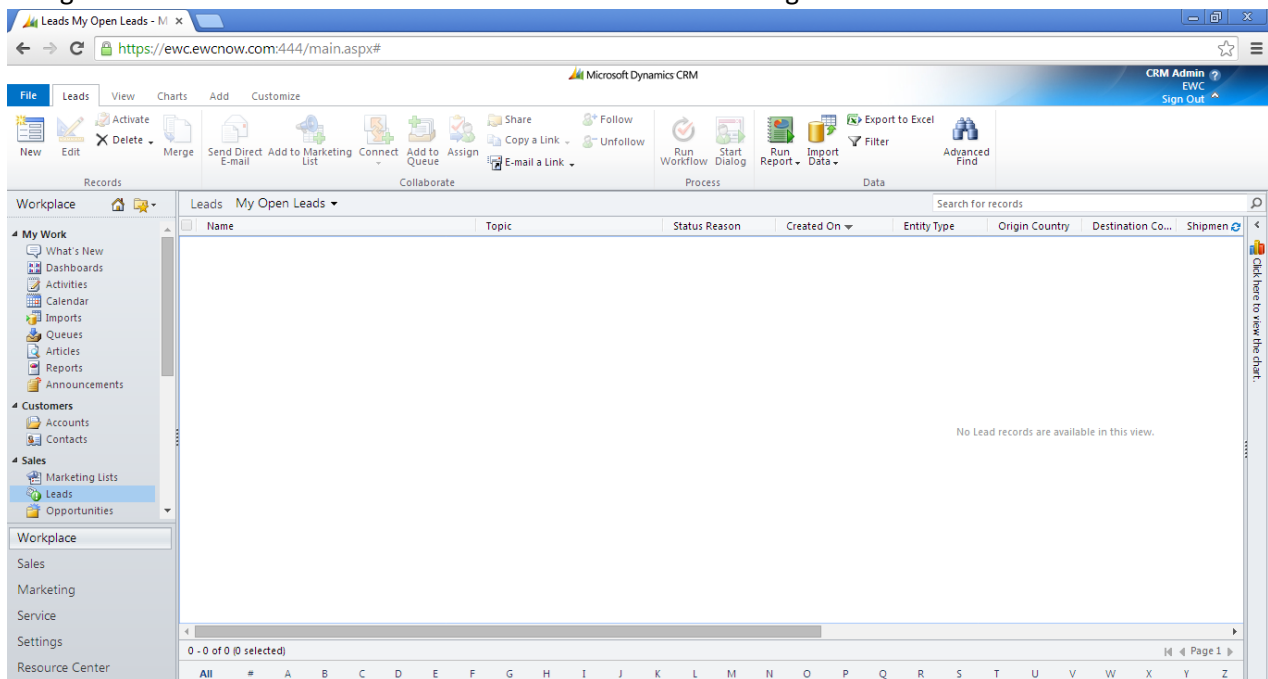
CRM Lead-RFQ-Proposal Process

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.

General

General Details		
Topic * Lead from Canvassing		Entity Type * Commerical
Salutation	Business Phone + 305.392.5085	Company Name * Expedited World Cargo, Inc.
First Name * Ralph	Home Phone	Street 1 + 9667 NW 33rd Street
Last Name + Soto	Mobile Phone	Street 2
Job Title	Fax	Street 3
Web Site	Other Phone	City + Miami
E-mail * ralph.soto@ewcn	Pager	State/Province + FL
Status Reason New	Owner * CRM Admin	ZIP/Postal Code + 33172
		Country/Region + United States

<div>Topic * <input type="text" value="Lead from Canvassing"/></div>	<div>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:</div> <table><tr><td>Lead from Web</td><td>Shipping USA to Panama</td><td>Lead shipping 20 Containers</td></tr><tr><td>Lead from Canvassing</td><td>Shipping Miami to Balboa</td><td>Lead shipping Heavy Equipment</td></tr><tr><td>Lead from Phone Call</td><td>Shipping Door to Door</td><td></td></tr></table>	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								
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																
<div>First Name *</div>	<div>Fields with a red asterisk are required fields and you will not be able to save the lead entity unless a data value exists.</div>																
<div>Last Name +</div>	<div>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.</div>																
<div>Owner *  CRM Admin</div>	<div>The lead is assigned to the user located in the Owner field.</div>																
<div>Status Reason <input type="text" value="New"/></div>	<div>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.</div> <table><tr><th>STATUS REASON</th><th>DESCRIPTION</th></tr><tr><td>NEW</td><td>new lead status</td></tr><tr><td>CONTACTED</td><td>lead has been contacted via phone or in person visit</td></tr><tr><td>EMAILED</td><td>lead has been sent a welcoming email</td></tr><tr><td>CONTACT SCHEDULED</td><td>a phone call has been scheduled as an activity</td></tr><tr><td>VISIT SCHEDULED</td><td>a visit has been scheduled as an activity</td></tr><tr><td>QUALIFIED</td><td>Lead has been qualified</td></tr><tr><td>DISQUALIFIED</td><td>Lead has been disqualified</td></tr></table>	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
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Entity Type * <input type="text" value="Commerical"/>	There are three different entity types. Individual, Commercial and Government.								
<table border="1"> <thead> <tr> <th>ENTITY TYPE</th> <th>DESCRIPTION</th> </tr> </thead> <tbody> <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> </tbody> </table>	ENTITY TYPE	DESCRIPTION	INDIVIDUAL	Must enter full name (first, last) of lead.	COMMERCIAL	Enter company name	GOVERNMENT	Enter company name	
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COMMERCIAL	Enter company name								
GOVERNMENT	Enter company name								

Description

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

Description

Lead is looking to ship shoes from US office to Panama. Would like to ship 20 containers a week from Miami to Balboa. Container sizes may vary from 20 ft to 40 ft containers.

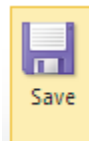
Notes & Activities Tab

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.

Activities

	Subject	Regarding	Activity Type	Activity Status	Owner	Priority	Start Date
To enable this content, save the record.							



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*.

Microsoft Dynamics CRM CRM Admin EVC

File Lead Add Customize List Tools Activities

Add New Activity Add Existing Activity Edit Bulk Delete Mark Complete Cancel Add Note Set Regarding Actions Include Connect Add to Queue Follow Collaborate Share Assign Activities Copy a Link E-mail a Link Filter Save Filters Save Filters as New View Current View Chart Pane View Run Workflow Start Dialog Run Report Export Activities Data

Task Fax Phone Call E-mail Letter Appointment Service Activity Campaign Response Recurring Appointment Visit Request Shipping Profile Details What's New Preferences

Related Common Activities Closed Activities Connections Documents Audit History Contacts Visit Requests

Lead Ralph Soto Lead Source Canvassing Rating Warm Owner CRM Admin

Notes & Activities

Activities All Activities Search for records

Subject	Regarding	Activity Type	Activity Status	Owner	Priority	Start Date	Due Date	Primary E
No Activity records are available in this view.								

0 - 0 of 0 (0 selected) Page 1

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.

Notes

Attach File Done

Title: Note created on 4/26/2014 4:31 PM by CRM Admin
Lead said he would be gathering all the documentation I mentioned over phone tomorrow and send to me via email.

CRM Admin 4/26/2014 4:31 PM





Shipment & Routing Detail Tab

Shipment Information				Routing	
Shipment Type Ocean	Shipment Direction Export	Origin Country UNITED STATES	Destination Country PANAMA	Origin Port Web	Destination Port Web
Service Type FCL	Cargo Ready Date 4/30/2014	Shipment Frequency One Time	Inco Terms CIF	Origin Zip Code	Destination Zip Code
Services Requested				Origin & Destination Door Address	
Forwarding * <input checked="" type="checkbox"/>	Trading * <input type="checkbox"/>	Customs * <input type="checkbox"/>	Warehousing * <input type="checkbox"/>	Origin Door Address EWC 9667 NW 33rd Street Miami, FL 33172	Destination Door Address Corporación ABC Calle Principal Panama City, Panama
Location of Warehousing					
Cargo Description					
Commodity Shoes					
Cargo Description Black Nike Sneakers, White Nike Sneakers					

Shipment Information

<div>Shipment Type</div> <div>Ocean</div>	<p>Enter the shipment type. The service types will pull the options available on from the shipment type you have selected.</p>															
<div>Shipment Direction</div> <div>Export</div>	<table border="1"> <thead> <tr> <th>SHIPMENT TYPE</th> <th>SHIPMENT DIRECTION</th> <th>SHIPMENT SERVICE TYPE</th> </tr> </thead> <tbody> <tr> <td>AIR</td> <td>Import, Export, Domestic and Foreign to Foreign</td> <td>Air Loose Cargo, Air Containerized</td> </tr> <tr> <td>OCEAN</td> <td>Import, Export, Domestic and Foreign to Foreign</td> <td>LCL, FCL and Breakbulk</td> </tr> <tr> <td>GROUND</td> <td>Import, Export, Domestic and Foreign to Foreign</td> <td>FTL, LTL and Drayage</td> </tr> <tr> <td>RAIL</td> <td>Import, Export, Domestic and Foreign to Foreign</td> <td>Rail Loose Cargo, Rail Containerized</td> </tr> </tbody> </table>	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
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<div>Service Type</div> <div>FCL</div>																

Routing

<div>Origin Country</div> <div> UNITED STATES</div>	<p>Type in the Origin Country in the field.</p> <p>You can also click the lookup button  to search for a country.</p>
<div>Destination Country</div> <div> PANAMA</div>	<p>Type in the Destination Country in the field.</p> <p>You can also click the lookup button  to search for a country.</p>
<div>Origin Port Web</div> <div></div> <div>Origin Zip Code</div> <div></div>	<p>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.</p>
<div>Origin Door Address</div> <div>EWC 9667 NW 33rd Street Miami, FL 33172</div>	<p>Enter the Origin and/or Destination door address if your moves are door to door, door to port or port to door.</p>

Service Requested

<div>Services Requested</div> <div> <div>Forwarding * <input checked="" type="checkbox"/></div> <div>Trading * <input type="checkbox"/></div> <div>Customs * <input type="checkbox"/></div> <div>Warehousing * <input type="checkbox"/></div> </div>	<p>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.</p>
--	--

Cargo Description

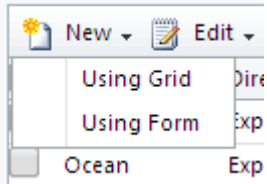
<div>Commodity</div> <div>Shoes</div>	<p>Enter the Commodity of the cargo.</p>
---------------------------------------	--

<p>Cargo Description</p> <p>Black Nike Sneakers, White Nike S</p>	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

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

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

Shipment Route Detail

Shipment Type		Origin & Destination	
Shipment Type Ocean	Shipment Direction Export	Origin Country UNITED STATES	Destination Country PANAMA
Shipment Service Type FCL	Shipment Mode Door to Door	Origin Port Port Everglades (PEF)	Destination Port Balboa (BLB)
		Origin CFS	Destination CFS
		Origin Door Miami (MIA)	Destination Door Panamá, Ciudad de (PTY)

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.

New Edit Delete Deactivate Route											
Type	Direction	Service Type	Mode	Origin Cou...	Dest. Coun...	Origin Port	Dest. Port	Origin Door	Dest. Door	Origin CFS	Dest. CFS
Ocean	Export	FCL	Door to Door	UNITED STA...	PANAMA	Miami (MIA)	Balboa (BLB)	Miami (MIA)	Panamá, Ciuda...		
Ocean	Export	FCL	Door to Door	UNITED STA...	PANAMA	Port Everglades ...	Balboa (BLB)	Miami (MIA)	Panamá, Ciuda...		

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

Save Save and New Cancel											
Type	Direction	Service Type	Mode	Origin Cou...	Dest. Coun...	Origin Port	Dest. Port	Origin Door	Dest. Door	Origin CFS	Dest. CFS
Ocean	Export	FCL	Door to Door	UNITED STA...	PANAMA	Miami (MIA)	Balboa (BLB)	Miami (MIA)	Panamá, Ciuda...		
Ocean	Export	FCL	Door to Door	UNITED STA...	PANAMA	Port Everglades ...	Balboa (BLB)	Miami (MIA)	Panamá, Ciuda...		
Ocean	Export	FCL		UNITED	PANAMA						

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.

Equipment Detail				Click on any of the check boxes to indicate what size and type of container the leads needs a price sheet for.
20FT Container	<input type="checkbox"/>	Flat Rack	<input type="checkbox"/>	
40FT Container	<input type="checkbox"/>	Open Top	<input type="checkbox"/>	
45FT Container	<input type="checkbox"/>	Reefer	<input type="checkbox"/>	
48FT Trailer	<input type="checkbox"/>	High Cube	<input type="checkbox"/>	
53FT Trailer	<input type="checkbox"/>			

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.

Cargo Items											
New	Edit	Delete									
Package Type	Pieces	Valuation	Length	Width	Height	UoM	Volume	UoV	Weight	UoW	Total
No records are available.											

Totals

Pieces:

Valuation: \$

Weight: kgs

Volume: m3

Volume Weight: vkgs

Chargeable Weight: kgs

Volume Weight Calculator: 166

Override Totals: ☐

Calculate Chargeable Weight by Shipment: ☐



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.

Package Detail

Package Type

 20FT Standard 

Pieces

10

Valuation





\$50,000

Cargo Description

Black Nikes

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

Cargo Items

 New  Edit  Delete 

<input type="checkbox"/>	Package Type	Pieces	Valuation	Length	Width	Height	UoM	Volume	UoV	Weight	UoW	Total
<input type="checkbox"/>	20FT Standard	10	\$50,000.00				in		m3		kgs	

Other Requirements Tab

Other Requirements

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

Other Requirements

Hazardous

☐

Perishables

☐

Live Animals

☐

Over Sized

☐

ITAR

☐

Cargo Palletized

☐

Stackable

☐

Cargo Insurance

☐

U.S. Flag Carrier

☐

Letter Of Credit

☐

Automobile

The Automobile section is information related for automobile shipments.

Automobile

Automobile Validation

☒ No


☐ Yes

New or Used

Other

Other

Country Of Origin



Hazardous & Harmonized Codes Tab

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

Hazardous Codes				Harmonized Codes													
<div><div>New Edit Delete</div><table><thead><tr><th>UN Number</th><th>UN Class</th><th>Flash Point</th><th>Package Group</th></tr></thead><tbody><tr><td colspan="4">No records are available.</td></tr></tbody></table></div>				UN Number	UN Class	Flash Point	Package Group	No records are available.				<div><div>New Edit Delete</div><table><thead><tr><th>Harmonized Code</th><th>Value</th></tr></thead><tbody><tr><td colspan="2">No records are available.</td></tr></tbody></table></div>		Harmonized Code	Value	No records are available.	
UN Number	UN Class	Flash Point	Package Group														
No records are available.																	
Harmonized Code	Value																
No records are available.																	

Special Instructions Tab

Enter special instruction related the shipment request.


Special Instructions

Special Instructions


Contact customer when cargo arrives to coordinate time of delivery.

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.

Account Information		Lead Information	
Account	Account Contact Person ⁺	Lead	Lead Contact Person ⁺
<input type="text"/>	<input type="text"/>	 Ralph Soto	<input type="text"/>
Account Address		Lead Address	
<input type="text"/>		9667 NW 33rd Street	
Account City ⁺	Account Zip Code ⁺	Lead City	Lead Zip Code ⁺
<input type="text"/>	<input type="text"/>	Miami	33172
Account Country ⁺	Account - Contact's Phone Number ⁺	Lead Country ⁺	Lead - Contac's Phone Number ⁺
<input type="text"/>	<input type="text"/>	United States	305.392.5085

Visit Request Details

Created By	Assigned To *
<input type="text"/>	<input type="text"/>
Begin Date/Time Requested	End Date/Time Requested
<input type="text"/>	<input type="text"/>
Time Preference ⁺	Visit Priority *
<input type="text"/>	<input type="text"/>
Purpose of the Visit *	Date Created
<input type="text"/>	<input type="text"/> 
Activity Status *	
<input type="text"/>	

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.

Shipping Profile

Shipping Profile Details

Export *	Yes	Air	Yes	Shipment Volume	<input type="text"/>
Import *	No	Ocean	Yes		
Foreign to Foreign *	Yes	Ground	Yes		
Domestic *	Yes	Rail	No		

Assigned Users

Export Department	Foreign Department
<input type="text"/>	<input type="text"/>
Import Department	Domestic Department
<input type="text"/>	<input type="text"/>

Details Tab

Company Info

Company Information	
Industry Distributors, Dispatchers and Processors ▼	
Lead Source * Canvassing ▼	Rating Warm ▼
Created By  CRM Admin 	Created On 4/26/2014  4:20 PM ▼
IES Code <input type="text"/>	Reference ID <input type="text"/>
Cargowise Code <input type="text"/>	

Industry Distributors, Dispatchers and Processors ▼	Industry – Select from the list of industries the lead belongs to.
Lead Source * Canvassing ▼	Lead Source – Select from the list how the lead was generated.
Rating Warm ▼	Rating – Select Hot, Warm or Cold to indicate what the sales stage is for this lead.
IES Code <input type="text"/>	IES Account number
Cargowise Code <input type="text"/>	Cargowise Account Number
Reference ID <input type="text"/>	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.

Contact Methods	
Preferred Any ▼	
E-mail <input checked="" type="radio"/> Allow <input type="radio"/> Do Not Allow	Bulk E-mail <input checked="" type="radio"/> Allow <input type="radio"/> Do Not Allow
Phone <input checked="" type="radio"/> Allow <input type="radio"/> Do Not Allow	Fax <input checked="" type="radio"/> Allow <input type="radio"/> Do Not Allow
Mail <input checked="" type="radio"/> Allow <input type="radio"/> Do Not Allow	

Marketing Material

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

Marketing Information	
Source Campaign <input type="text"/>	Last Campaign Date <input type="text"/>
Marketing Material <input checked="" type="radio"/> Send <input type="radio"/> Do Not Send	Qualify Trigger <input type="text"/>
	Disqualification Description <input type="text"/>

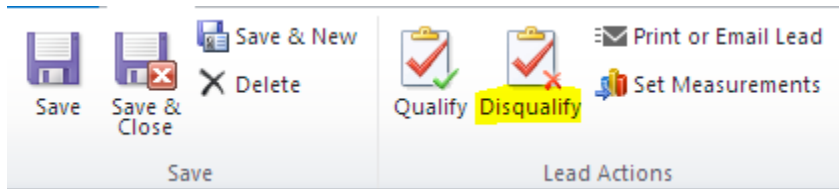
<p>Source Campaign <input type="text"/></p>	<p>The source campaign is used to register how the lead was generated. Example of campaigns are:</p> <p>Mailers Email Ad (assign reference ID to Ad) Trade Show – Each trade show is considered a campaign.</p>
<p>Marketing Material <input checked="" type="radio"/> Send <input type="radio"/> Do Not Send</p>	<p>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.</p>

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.

Disqualify Lead
Select a reason the lead is being disqualified

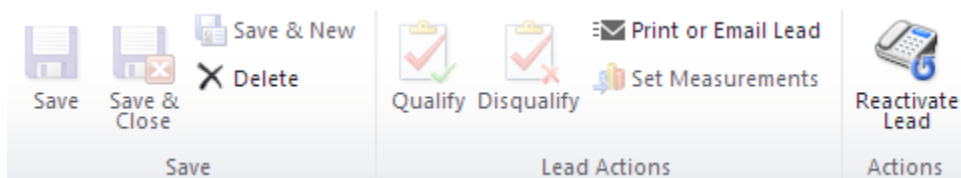
Reason:

Description:

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 finalized.

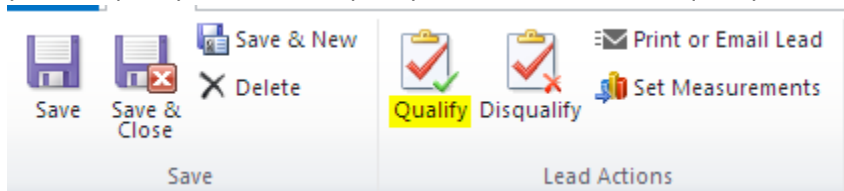
Reactivate Lead

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



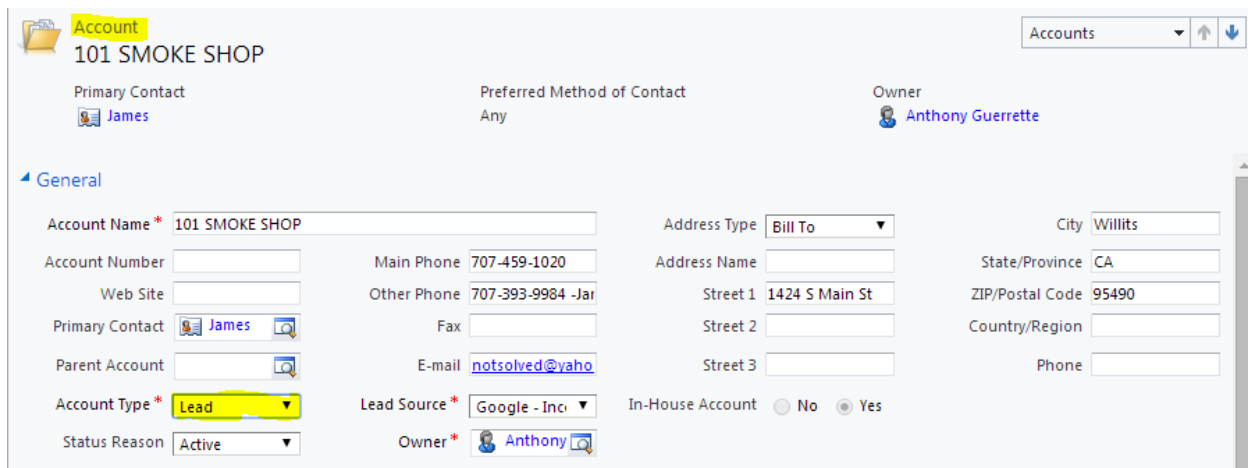
Qualifying Lead

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										
<input type="checkbox"/>	Package Type	Pieces	Valuation	Length	Width	Height	UoM	Volume	UoV	Weight	UoW	Total
<input type="checkbox"/>	20FT Standard	10	\$50,000.00				in		m3		kgs	
<input type="checkbox"/>	40FT Standard	15	\$75,000.00				in		m3		kgs	

Entering loose cargo on the cargo detail grid.

 New	 Edit	 Delete										
<input type="checkbox"/>	Package Type	Pieces	Valuation	Length	Width	Height	UoM	Volume	UoV	Weight	UoW	Total
<input type="checkbox"/>	Box	200	\$2,500.00	25.00	25.00	25.00	in	0.26	m3	20.00	kgs	4,000
<input type="checkbox"/>	Pallet	10	\$10,000.00	42.00	42.00	48.00	in	1.39	m3	100.00	kgs	1,000

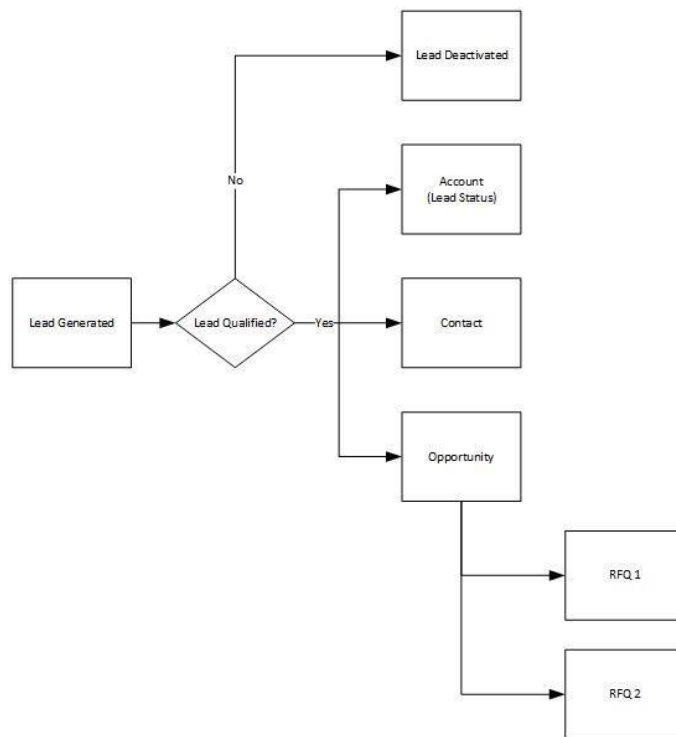
***What not to do – Entering containers combined with loose cargo**

 New	 Edit	 Delete										
<input type="checkbox"/>	Package Type	Pieces	Valuation	Length	Width	Height	UoM	Volume	UoV	Weight	UoW	Total
<input type="checkbox"/>	20FT Standard	10	\$50,000.00				in		m3		kgs	
<input type="checkbox"/>	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.

Creating RFQ's from Qualify Lead



RFQ Creation Rules When Qualifying a Lead

Any route created that contains the following data different from the other will create a new RFQ.

1. Shipment Type
2. Shipment Direction
3. Shipment Service Type

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.

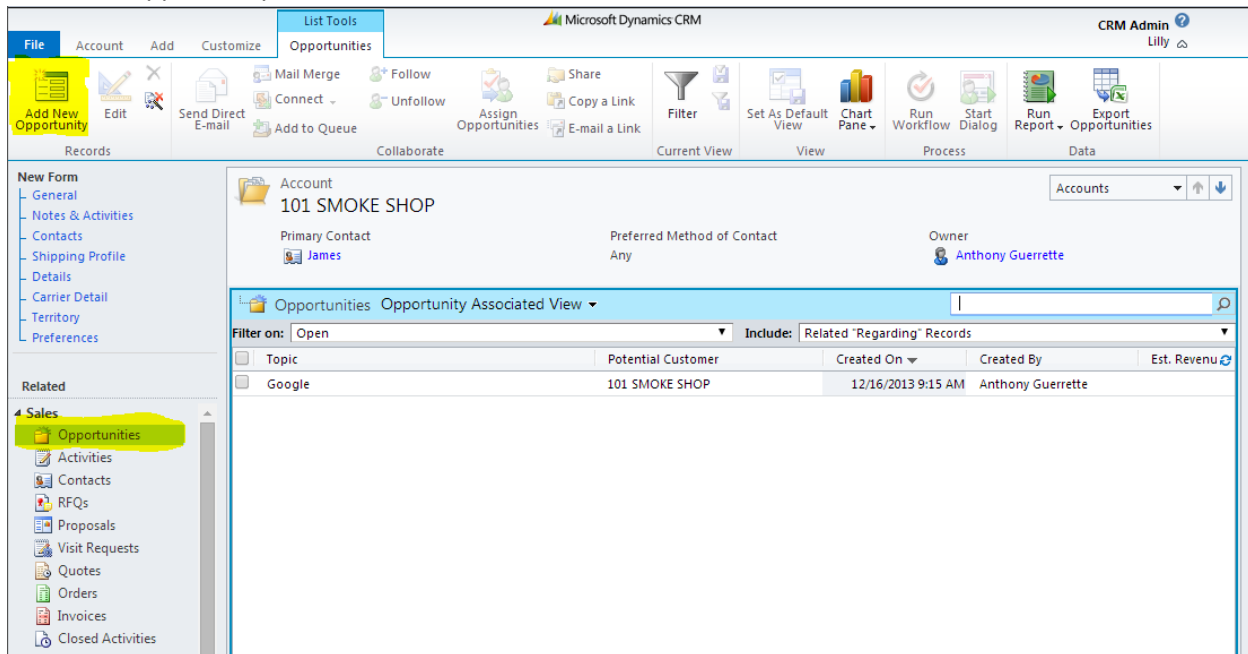
Opportunity Statuses

The opportunity has statuses that close the opportunity.

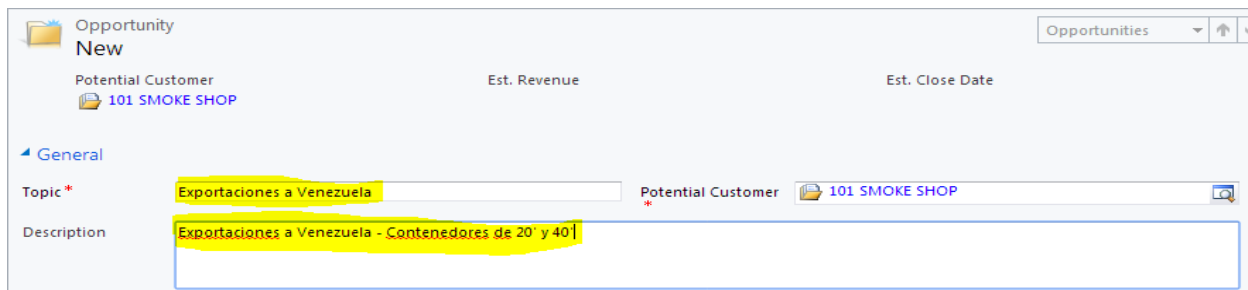
In Progress	Opportunity has been opened and it is in progress.
Won	Cannot close an opportunity as won unless one RFQ/Proposals is won.
Lost	Cannot close an opportunity as lost unless one RFQ/Proposals is lost.

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

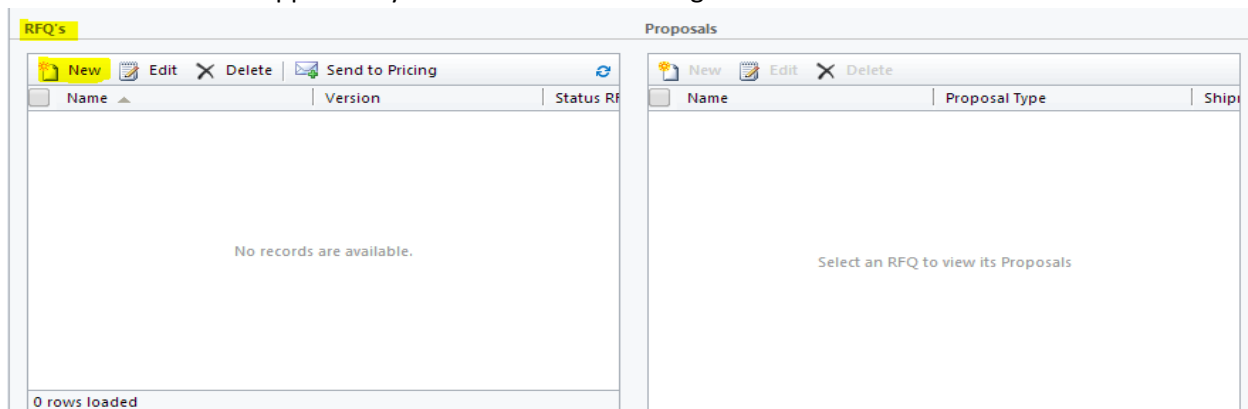
Go to the Opportunity menu and select the “New” button.



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

RFQ 10000071RFQ

Account 101 SMOKE SHOP

Origin Country KOREA, REPUBLIC OF

Destination Country UNITED STATES

Status RFQ Open

General

RFQ # 10000071RFQ Version 1

Account * 101 Active Proposal

Contact * Jan Status Open

Opportunity * Go Owner * An

Shipment Information Tab

Shipment Information

Shipment Type * Ocean

Shipment Direction * Export

Service Type * FCL

Origin Country * UNITED STATES

Destination Country * PANAMA

Cargo Ready Date 4/30/2

Shipment Frequency One Time

INCO Terms CIF

Services Requested

Forwarding ☒ Trading ☐

Customs Brokering ☐ Warehousing ☐

Location of Warehousing

Routes

Shipment Mo...	Origin Port	Destination...	Origin Door	Destination...	Origin
Door to Door	Miami (MIA)	Balboa (BLB)	Miami (MIA)	Panamá, Ci...	
Door to Door	Port Evergl...	Balboa (BLB)	Miami (MIA)	Panamá, Ci...	

2 rows loaded

Origin & Destination Door Address

Origin Door Address: EWC, 9667 NW 33rd Street, Miami, FL 33172

Destination Door Address: Corporación ABC, Calle Principal, Panama City, Panama

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.






Save Save & Close Delete

Send to Pricing Create Revision Print or Email RFQ Create Price List Create Proposal






RFQ Actions

Click Save and Close.

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

RFQ Detail			
<div> New  Edit  Delete  Send to Pricing </div>			
<input type="checkbox"/> Name ▲	Version	Status RFQ	RFQ
<input checked="" type="checkbox"/> 10000181RFQ	1	Open	

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

RFQ Detail			
<div> New  Edit  Delete  Send to Pricing </div>			
<input type="checkbox"/> Name ▲	Version	Status RFQ	RFQ
<input checked="" type="checkbox"/> 10000181RFQ	1	In Pricing	

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

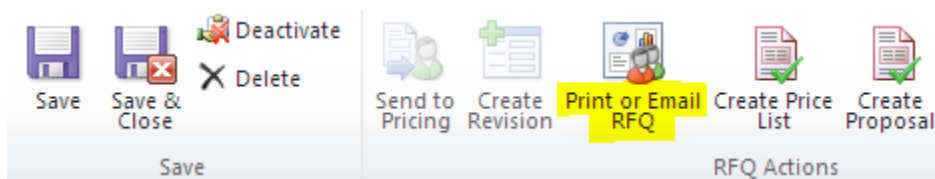
Multiple proposals can be created on an RFQ but only one active proposal can be assigned to an RFQ. This leaves other proposals linked to the same RFQ. When one proposal is set to won, all other proposals linked to the RFQ will be set to close.

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.




Template: RFQ Header - Miami ▼	Select the template header that will show the different office locations to toggle from.		
<input checked="" type="checkbox"/> Hide General Section	Hide General Information is selected by default which hides the Account contact information. Remove the check box to view the data.		
General Detail			
Account	Expedited World Cargo, Inc.		
Contact Name	Ralph Soto		
Phone#	305.392.5085		
Email	ralph.soto@ewcnow.com		
<input type="checkbox"/> Hide System Section	Hide System section hides the system information below. It is not set by default.		
System Detail			
RFQ#	10000181RFQ	Version#	1
Opportunity	Lead from Canvassing	Owner	CRM Admin
Status	In Pricing	Created On	4/27/2014

Print RFQ - Google Chrome

https://lilly.shiplilly.com:444/%7B635391297270003731%7D/WebResources/lilly_rf/PrintRfq.html?ic

Template: Miami Office ☐ Hide General Section ☐ Hide System Section Print Email



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Email
info@shiplilly.com

General Detail

Account	PAINT RAVE
Contact Name	Jason Beddow
Phone#	248-505-8926
Email	sales@paintrave.com

System Detail

RFQ#	10002960RFQ	Version#	1
Opportunity	Milton, WI to Martinique, FWI	Owner	Luis Gomez
Status	In Pricing	Created On	6/23/2014

Shipment Detail

Shipment Type	Ocean
Shipment Direction	Export
Service Type	LCL
Cargo Ready Date	6/24/2014
Shipment Frequency	Monthly
INCO Terms	CIF
Commodity	(PAINT SUPPLIES)

Routing Details

Shipment Mode: Door to Port

Origin	Destination
Country UNITED STATES	Country MARTINIQUE
Door Milton (M8I)	Port Fort-de-France (FDF)
Zipcode 53563	

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.

E-mail New

E-mail Messages

E-mail

From: CRM Admin

To: Luis Gomez


Cc:

Bcc:

Subject: RFQ #10002960RFQ - PAINT RAVE - Ocean - Export - LCL - UNITED STATES - MARTINIQUE

Regarding: 10002960RFQ

Rich text editor toolbar: Bold, Italic, Underline, Bulleted List, Numbered List, Indent, Outdent, Link, Unlink, Font Color, Background Color, Insert Template, Insert Article.



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www.shiplilly.com

Email
info@shiplilly.com

General Detail

Account	PAINT RAVE
Contact Name	Jason Beddow
Phone	P. 305.513.9540

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.

Print RFQ - Google Chrome

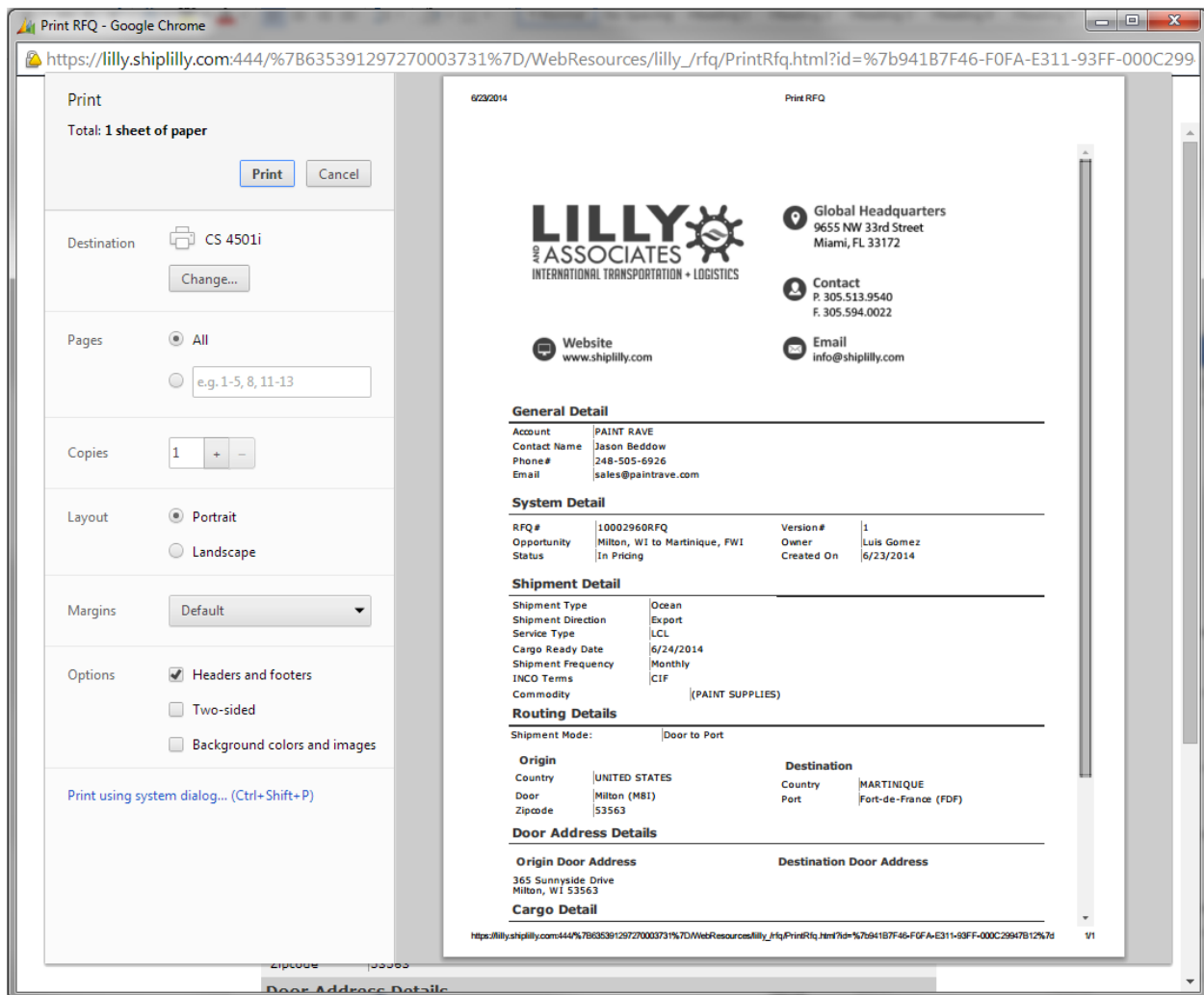
https://lilly.shiplilly.com:444/%7B635391297270003731%7D/WebResources/lilly_/rfq/PrintRfq.html?ic

Template: Miami Office

☐ Hide General Section ☐ Hide System Section

Print Email

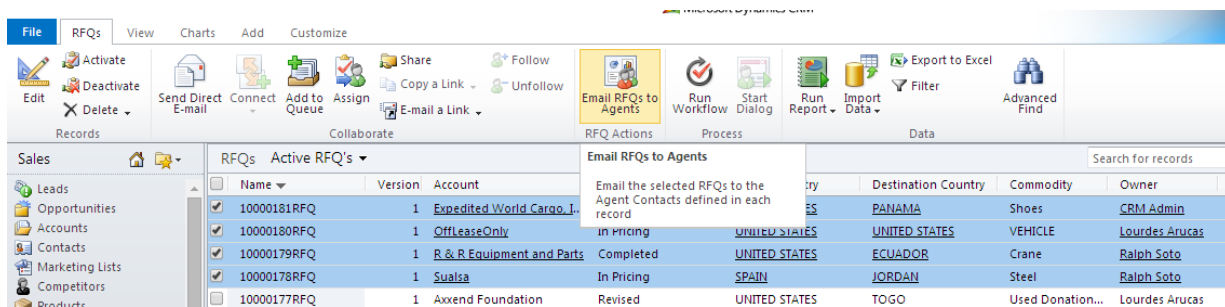
The print preview pop up window will appear



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

The screenshot shows a web browser window with the address bar displaying https://ewc.ewcnw.com:444/WebResources/new_/html/Sen. The page title is "Email RFQs to Agents" with a subtitle "Email the selected RFQs to the Agents selected below".

There are two dropdown menus: "Email Template:" with the selected value "RFQ Header - Miami" and "Agent Template:" with the selected value "GUATEMALA". Both dropdowns have a magnifying glass icon on the right.

Below the dropdowns is the instruction "Select the Contacts to email the RFQ to ...". Underneath is a table with two columns: "Agent" and "Contact".

Agent	Contact
<input type="checkbox"/> Unicarga	Tyrone Aguilar

At the bottom of the form are two buttons: "Create" and "Cancel".

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.



Cargo Items

 New	 Edit	 Delete	 Copy Record			
<div>Using Grid</div> <div>Using Form</div>						
Pieces	Valuation	Length	Width	Height	UoM	Vol

Package Detail

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

Package Detail

Package Type
 Pallet 

Pieces: 15 Valuation: \$50,000.00

Cargo Description
White Nikes

Dimensions

Enter the length, width and height.

Dimensions

Length	Width	Height	Unit Of Measure
48.00	48.00	48.00	in ▼

Weight-Volume-Volume Weight

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

Weight	
Weight Per Item 20.00	Unit Of Weight lbs
Total Weight 300.00	Enter Weight Manually <input type="checkbox"/>
Volume	
Volume Per Item 64.00	Unit Of Volume ft3
Total Volume 960.00	Enter Volume Manually <input type="checkbox"/>
Volume Weight	
Volume Weight 9,993.25	Unit of Volume Weight vlbs
Enter Volume Manually <input type="checkbox"/>	

Temperature control

Refrigerated		
Temperature Control <input type="checkbox"/>		
Refrigerated Type Fresh	Temperature 	Temperature Conversion Celsius

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.

RFQ Actions									
Save	Save & Close	Deactivate	Delete	Send to Pricing	Create Revision	Print or Email RFQ	Create Price List	Create Proposal	Set Measurements

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

Set Measurement
Set the measurement types to use for this record.

Measure of Unit

in

Measure of Weight

kgs

Measure of Volume

m3

Measure of Volume Weight

vkgs

Volume Calculation

166

OK

Cancel

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.

Cargo Items

New	Edit	Delete	Copy Record				
Using Grid	Pieces	Valuation	Length	Width	Height	UoM	Vol
Using Form							

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

Look Up Record

Enter your search criteria and click Search to find matching records. Filter your results and view different columns of data by using the View options. Then, select the record you want and click OK.

Look for: ☐ Show Only My Records

View:

Search:

	Name ▲	Package Class	Type
<input type="checkbox"/>	20FT Open Top	CNT	CNT
<input type="checkbox"/>	20FT Refrigerated	CNT	CNT
<input type="checkbox"/>	20FT Standard	CNT	CNT
<input type="checkbox"/>	40FT Flat Rack	CNT	CNT
<input type="checkbox"/>	40FT HC Refrigerated	CNT	CNT
<input type="checkbox"/>	40FT High Cube	CNT	CNT
<input type="checkbox"/>	40FT Open Top	CNT	CNT
<input type="checkbox"/>	40FT Refrigerated	CNT	CNT
<input type="checkbox"/>	40FT Standard	CNT	CNT
<input type="checkbox"/>	45FT HC Refrigerated	CNT	CNT
<input type="checkbox"/>	45FT High Cube	CNT	CNT
<input type="checkbox"/>	45FT Standard	CNT	CNT
<input type="checkbox"/>	48FT Truck Trailer	CNT	TRL

1 - 88 of 88 (0 selected) Page 1

Properties New

OK Cancel Remove Value

Package Detail

Package Type



20FT Standard



Pieces


10






Valuation

\$75,000.00

Cargo Description

Black Nikes

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

Cargo Items								Totals	
<div> New  Edit  Delete  Copy Record </div>								Pieces	10
<input type="checkbox"/>	Package Type	Pieces	Valuation	Length	Width	Height	UoM	Total Valuation	\$75,000.00
<input type="checkbox"/>	20FT Standard	10	\$75,000.00				in	Weight	
								Volume	
								Volume Weight	
								Chargeable Weight	0.00
								Volume Weight Calculator	166 ▼
								Override Totals	<input type="checkbox"/>
								Calculate Chargeable Weight by Shipment	<input type="checkbox"/>

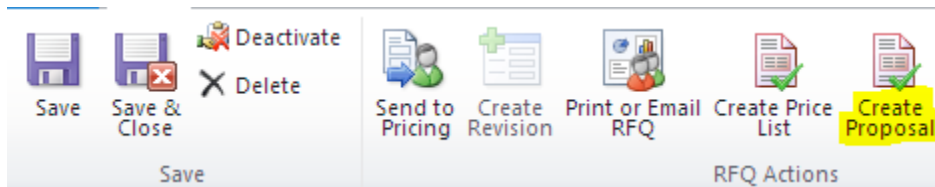
Creating a Proposal

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.

Create Proposal
Select one or more Carriers and apply a Markup to use for the Proposal.

Select Carriers

Available Carriers

CCNI
CMA CGM
Crowley
Evergreen
Interocean Lines
Interocean Lines, Inc.
King Ocean
MSC
NYK Line
S.E.A. CORP
Seaboard Marine

1 - 11 of 11

Selected Carriers

Seaboard Marine
Crowley

1 - 2 of 2

Add >>
<< Remove

Next Cancel

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.

Select Markup	
Carrier	Markup
Seaboard Marine	NONE ▼
Crowley	NONE ▼

CreateCancel

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

There are unsaved changes in this window.
What do you want to do?

☒ Save my changes
☐ Discard my changes

To keep working on this page, click Cancel.

OKCancel

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.

General

General Detail		System Detail	
Account * Expedited World Cargo, Inc.	Contact Ralph Soto	RFQ * 10000182RFQ	Opportunity * USA - Panama
Description <input type="text"/>	Remarks <input type="text"/>	Status Reason Active ▼	Owner * CRM Admin
Shipment Details		Proposal Status Assigned ▼	Pricing User CRM Admin
Type * Ocean ▼	Direction * Export ▼	Service Type * FCL ▼	Commodity <input type="text"/>
Validity Date 4/27/2014		Expiration Date <input type="text"/>	

The Cargo Items are copied over from the RFQ

Routes & Routes Legs

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.

Routes						Route Legs						
<div> New Edit Delete Duplicate Route </div>						<div> New Edit Delete Move Up Move Down Reset </div>						
Route ID	Carrier	Agent	Service Type	Shipment Mode	T	Leg #	Shipment Mo...	Shipment Type	Carrier	Origin	Destination	Tot
<input checked="" type="checkbox"/> 10000074PRU	Crowley		FCL	Door to Door	T							
<input type="checkbox"/> 10000076PRU	Crowley		FCL	Door to Door		1	Door to Port	Ground		Miami (MIA)	Miami (MIA)	\$0.
<input type="checkbox"/> 10000073PRU	Seaboard Marine		FCL	Door to Door		2	Port to Port	Ocean	Crowley	Miami (MIA)	Balboa (BLB)	\$0.
<input type="checkbox"/> 10000075PRU	Seaboard Marine		FCL	Door to Door		3	Port to Door	Ground		Balboa (BLB)	Panamá, C...	\$0.