

VISION SRT- UPGRADING TO NEED CARD MODULE VERSION

VISION DEVELOPMENT TEAM

MAY 2021

VISION SRT- HOW TO UPGRADE

IMPORT DATA FROM OLD SRT

ADDING CALLS WITH NEED CARD

VIEW OR EDIT CALLS

UPLOADING CALLS

IMPORT DATA FROM OLD SRT

VANGUARD
LOGISTICS

ENSURE YOUR OLD SRT IS SAVED AND CLOSED BEFORE IMPORTING

VANGUARD
LOGISTICS

CLICK ON INPUT
DATA

↓

Input Data

Remainder

Upload Data

Country	Office	User
BRAZIL	Sao Paulo	Alice Prima

Select User

Start Date

Start Date	End Date
27-05-2021 00:00	27-05-2021 23:59

End Date

Call Type	No. of Calls	OBA's Secured	Quotes Sent	Leads Sent
Face to Face	0	0	0	0
Phone Call	0	0	0	0
Online	0	0	0	0
Cold Call	0	0	0	0
Other	0	0	0	0
Total	0	0	0	0

Add Call

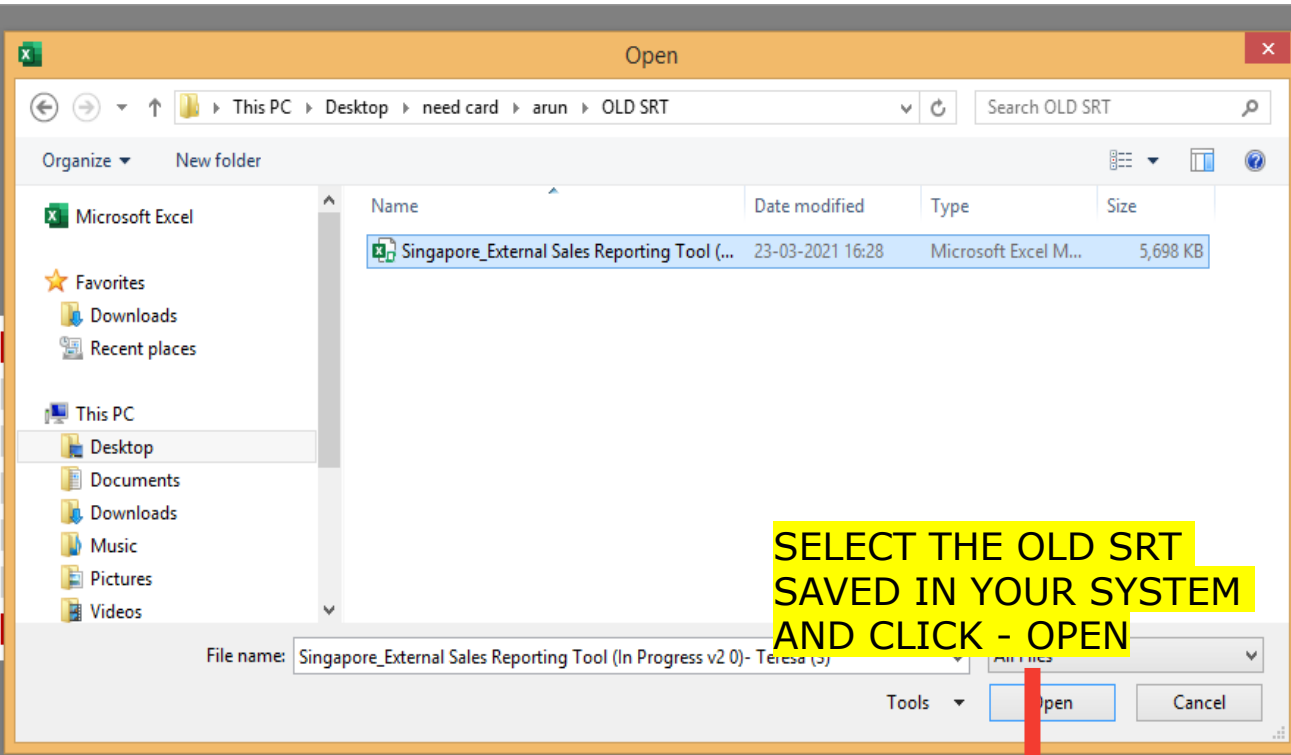
Consolidate

View Calls

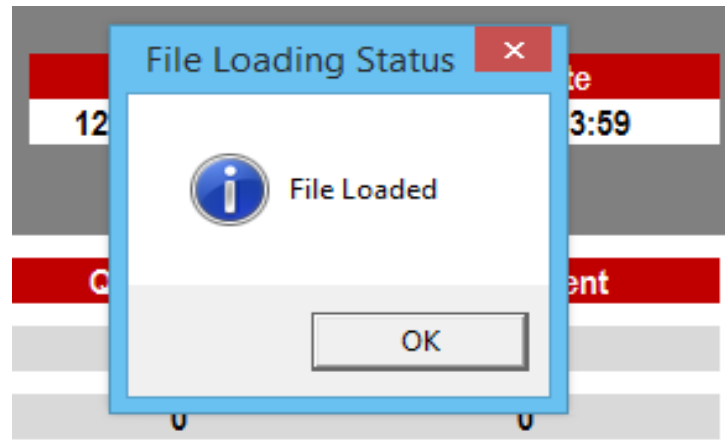
Input Data

Remainder

Upload Data



HAVE PATIENCE YOUR DATA ARE BEING IMPORTED IN THE NEW VERSION- IT MAY TAKE FEW MINUTES DEPENDS ON THE DATA IN YOUR PREVIOUS SRT



ADDING CALLS WITH NEED CARD

VANGUARD
LOGISTICS

VANGUARD
LOGISTICS

Country	Office	User
Belgium	Belgium	Nico Lombaerts

Select User

Start Date

Start Date	End Date
01-03-21 00:00	28-03-21 23:59

End Date

CLICK ON ADD
CALLS

Input Data

Call Type	No. of Calls	OBA's Secured	Quotes Sent	Leads Sent
Face to Face	0	0	0	0
Phone Call	0	0	0	0
Online	0	0	0	0
Cold Call	0	0	0	0
Other	0	0	0	0
Total	0	0	0	0

Add Call

Remainder

Consolidate

Upload Data

View Calls

ENTER THE REQUIRED CALL DETAILS

VANGUARD
LOGISTICS

1

Client

Name* : Client 1

Classification*
☐ AAA ☐ AA
☒ Wholesale ☐ Retail

Address* : Rio

Contact

Name* : Abc, mno, xyz

Tel No.* : 123, 456, 789

E-mail : abc@client, mno@client ,xyz@client

Title :

Product/Pairing *

CLICK ON ADD FOR
QUALIFICATION FORM

3

Add

Remove

View / Edit

NEW NEED CARD

EXISTING PORTPAIR (ADD NEED)

Call Details

Date* : 05-31-21 19:37 Update

Type* :
Face to Face
Phone Call
Online
Cold Call
Other

E-Mail : ☐ Generate

Follow-Up Date : Update

Call Notes* :
This is a dummy call entry for training purposes.

Managers Notes : view

Add Details

OBA : ☐ Secured

Quote : ☐ Sent Lead : ☐ Sent

Status* :
New
Existing
Extension
Lost
Dead

Submit

Compulsory fields are indicated with an asterix *

3. QUALIFICATION

Product/Pairing

Product : *

Airfreight

Domestic / PO Managt

3rd Party

FCL (TEU)

Origin : *

AEDXB

Destination : *

BRRIO

Annual Volume

120

Pricing

\$67

Overseas Agent/Supplier/Consignee

demo

Terms

FOB

Competition

shipco

Commodity

machine parts

Rate Required

\$50

CLICK ON SUBMIT BUTTON

Submit

4. ADDING NEEDS

VANGUARD LOGISTICS

AFTER SUBMITTING QUALIFICATION FORM (STEP 3) YOU WILL BE DIRECTED TO THE CALL DETAIL SCREEN AS BELOW - CLICK ON NEED AS A STEP 4

Call Details

Client

Name* :

Client 1

Classification*

☐ AAA

☐ AA

☒ Wholesale

☐ Retail

Address* :

Rio

Contact

Name* :

Abc, mno, xyz

Tel No.* :

123, 456, 789

E-mail :

abc@client, mno@client, xyz@client

Title :

Call

Date* :

05-31-21 19:37

Update

Type* :

Face to Face

Phone Call

Online

Cold Call

Other

E-Mail :

☐ Generate

Follow-Up Date :

Update

Call Notes* :

This is a dummy call entry for training purposes.

Managers Notes :

View

Product/Pairing *

Product	Origin	Destination	Add Details
LCL (CBM)	AEDXB	BRRIO	Complete

QAULIFICATION SUMMARY UPDATED

Add

Remove

View / Edit

4

CLICK ON NEW NEEDS

NEW NEED CARD

EXISTING PORTPAIR (

Add Details

DBA :

☒ Secured

Quote :

☐ Sent

Lead :

☐ Sent

Status* :

New

Existing

Extension

Lost

Dead

NOW YOU CAN ADD DETAILS

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4. ADDING NEEDS TO NEW OR EXISTING PRODUCT PAIR

Call Details

Client

Name* : Client 1

Classification*

☐ AAA

☐ AA

☒ Wholesale

☐ Retail

Address* : Rio

Contact

Name* : Abc, mno, xyz

Tel No.* : 123, 456, 789

E-mail : abc@client,mno@client,xyz@client

Title :

Product/Pairing *

Product	Origin	Destination	Add Details
LCL (CBM)	AEDXB	BRRIO	Complete
FCL (TEU)	USNYC	BRRIO	Complete

Add

Remove

View / Edit

A. SELECT THE NEW ADDED TRADELANE AND CLICK ON "NEW NEED CARD".

NEW NEED CARD

EXISTING PORTPAIR (ADD NEED)

Compulsory fields are indicated with an asterix *

Submit

Call Details

Client

Name* : Client 1

Classification*

☐ AAA

☐ AA

☒ Wholesale

☐ Retail

Address* : Rio

Contact

Name* : Abc, mno, xyz

Tel No.* : 123, 456, 789

E-mail : abc@client,mno@client,xyz@client

Title :

Product/Pairing *

Product	Origin	Destination	Add Details
LCL (CBM)	AEDXB	BRRIO	Complete
FCL (TEU)	USNYC	BRRIO	Complete

Add

Remove

View / Edit

B. SELECT THE EXISTING RADELANE AND CLICK ON "EXISTING PORTPAIR "ADD NEED".

NEW NEED CARD

EXISTING PORTPAIR (ADD NEED)

Compulsory fields are indicated with an asterix *

Submit

4. NEEDS

Need Card

Product / Service Need *

Multiple Sailings per week

Organizational Need *

Safe Handling
Dangerous Goods Capabilites
Invoicing Accuracy
Multiple Sailings per week
EDI Capabilities
Fast Quote Turn Around
Late Gates for CFS Cut off
Inland Pick up & Delivery

Personal Need *

Add Next Need

Submit

A. SELECT **PRODUCT/SERVICE NEEDS** AND ELABORATE THE DETAILS IN FREE TEXT BOX- ENCIRCLED RED

B. SELECT **ORGANIZTIONAL NEEDS** AND ELABORATE THE DETAILS IN FREE TEXT BOX- ENCIRCLED RED

Need Card

Product / Service Need *

Multiple Sailings per week

Organizational Need *

Support Inter company commun
Supports our process
Cost Savings
Support Inter company communica
Supports efficiency intitiative
Commitments to our customer
Avoid additional costs

Personal Need *

Add Next Need

Submit

Need Card

Product / Service Need *

Multiple Sailings per week

Organizational Need *

Support Inter company commun

Personal Need *

Bonus/ Incentive at year end
Needs help supporting other depart
Pressure from Supervisor
Help in satisfying customers
Help in gaining new customers
Bonus/ Incentive at year end

Add Next Need

Submit

C. SELECT **PERSONAL NEEDS** AND ELABORATE THE DETAILS IN FREE TEXT BOX- ENCIRCLED RED

ADDING MULTIPLE NEEDS/SUBMIT

Need Card

Product / Service Need *

Multiple Sailings per week

ABCDEFGH

Organizational Need *

Support Inter company commun

IJKLMNOP

Personal Need *

Bonus/ Incentive at year end

QRSTUVWXYZ

Add Next Need

CLICK HERE TO ADD MULTIPLE NEEDS IF ANY

CLICK ON SUBMIT AFTER ALL NEEDS ARE ENTERED

Submit

ACTION/QUESTIONS/COMMENTS

VANGUARD
LOGISTICS

ACTION_OBJECTION_COMMENTS

Action (HOW A DECISION IS
IMPLEMENTED)

abcdefgh

OBJECTIONS / QUESTIONS

ijklmnopqr

POSITIVE COMMENTS

stuvwxyz|

CLICK ON SUBMIT TO
FINISH THE NEED FORM

→

Submit

FINISH THE CALL

Call Details

Client

Name* : C H ROBINSON

Classification*
☒ AAA ☐ AA
☐ Wholesale ☐ Retail

Address* : Antwerp

Contact

Name* : Mr. XYZ; Mr. ABC; Ms. MNO

Tel No.* : +1234; +2345; +3456

E-mail : xyz@chr;abc@chr; mno@chr

Title : Ocean Head; pricing; operation head

Call

Date* : 08-04-21 12:44 Update

Type* : Face to Face
Phone Call
Online
Cold Call
Other

E-Mail : ☐ Generate

Follow-Up Date : Update

Call Notes* : Had a call with Ms. MNO for the movement of cargo under HBL- 123456.....and so on

Managers Notes : View

Product/Pairing *

Product	Origin	Destination	Add Details
LCL (CBM)	BEANT	ZADUR	Complete

Add Remove

NEEDS

Add Details

OBA : ☒ Secured

Quote : ☒ Sent Lead : ☐ Sent

Status* : New
Existing
Extension
Lost
Dead

Compulsory fields are in red

CLICK ON SUBMIT TO FINISH THE CALL ENTRY

Submit

CHECK THE SUMMARY ON OVERVIEW TAB

VANGUARD
LOGISTICS

Input Data

Remainder

Upload Data

Start Date

Start Date

08-04-21 00:00

End Date

08-04-21 23:59

End Date

Call Type	No. of Calls	OBAs Secured	Quotes Sent	Leads Sent
Face to Face	0	0	0	0
Phone Call	1	1	1	0
Online	0	0	0	0
Cold Call	0	0	0	0
Other	0	0	0	0
Total	1	1	1	0

Add Call

Consolidate

View Calls

Overview

+

UPLOADING THE CALLS

Points to be noted before uploading calls.

1. Check the dates – Start and End date
 - For daily upload – Start and End date should be same.
 - For uploading last 2-3 days calls – Start date should be the date from when you wish to upload and End date should be always the current/today's date.
 - For uploading a week call – start date should be Monday's date and End date should be Sunday's date

2. Check the summary – it is advisable to check summary of your calls before you upload the call details the total number of calls should be matched to the number of calls you entered for a day/week.

If summary doesn't match with your calls entered, please go to view calls and check the call entered for the upload duration as per overview tab

ONCE ALL OK – CLICK ON UPLOAD DATA BUTTON

The screenshot shows a web interface for uploading call data. At the top, there are date selection fields: 'Start Date' (08-04-21 00:00) and 'End Date' (08-04-21 23:59). Below these are buttons for 'Input Data', 'Add Call', 'Consolidate', and 'View Calls'. The central part of the interface is a table with the following data:

Call Type	No. of Calls	OBAs Secured	Quotes Sent	Leads Sent
Face to Face	0	0	0	0
Phone Call	1	1	1	0
Online	0	0	0	0
Cold Call	0	0	0	0
Other	0	0	0	0
Total	1	1	1	0

At the bottom left, there is an 'Upload Data' button. A red arrow points to this button. To the right of the arrow, a yellow box contains the text: 'CLICK ON UPLOAD DATA ONCE ALL CALLS ARE ENTERED FOR A DAY/WEEK'. At the bottom of the interface, there is a navigation bar with an 'Overview' tab and a plus icon.

EDIT/VIEW CALLS

To view or Edit calls, please check and ensure.

1. Check the dates – Start and End date of the duration you want to view
2. Check if the correct User is selected – Normally you don't have to change this

CLICK ON VIEW CALLS TO
FIND THE CALL

3. Select the call you want to view/edit

4. Click on view button to view/edit the call.

You will be directed to the screen on next slide to view/edit

The screenshot shows the 'Call List' interface with the following elements and annotations:

- 1**: A red circle highlights the 'Date From' and 'Date To' fields, both set to '08-04-21 00:00' and '08-04-21 23:59' respectively, with 'Update' buttons.
- 2**: A red circle highlights the 'User' dropdown menu, which is open and shows a list of users: 'Wolf kusse', 'Robbie verhaegen', 'Nico Lombaerts' (highlighted), and 'Ahmed el Mokkadem'.
- 3**: A red circle highlights a row in the 'Call List' table. The row contains: Date '08-04-2021 13:20', Call Type 'Phone Call', User 'Nico Lombaerts', Client Name 'C H ROBINSON', Classification 'AAA', Address 'Antwerp', Contact Name 'aaa', Follow-Up Date, and Managers Comment 'Notes'.
- 4**: A red circle highlights the 'View' button at the bottom left of the interface.

Other visible elements include 'Call Type' (Face to Face, Phone Call, Online, Cold Call, Other), 'No. of Calls', 'OBAs Secured', 'Quotes Sent', 'Leads Sent', and a 'Total' row showing 1 call. The bottom right shows '1 Calls' and an 'Export Calls to Excel' button.

YOU CAN VIEW/EDIT THE CALL NOW AND SUBMIT AGAIN

VANGUARD
LOGISTICS

Call Details

Client

Name* : C H ROBINSON

Classification*
☒ AAA ☐ AA
☐ Wholesale ☐ Retail

Address* : Antwerp

Contact

Name* : Mr. XYZ; Mr. ABC; Ms. MNO

Tel No.* : +1234; +2345; +3456

E-mail : xyz@chr;abc@chr; mno@chr

Title : Ocean Head; pricing; operation head

Product/Pairing *

Product	Origin	Destination	Add Details
LCL (CBM)	BEANT	ZADUR	Complete

Add

Remove

NEEDS

Call

Date* : 08-04-21 12:44

Update

Type* :

Face to Face
Phone Call
Online
Cold Call
Other

E-Mail : ☐ Generate

Follow-Up Date :

Update

Call Notes* :

Had a call with Ms. MNO for the movement of cargo under HBL- 123456.....and so on

Managers Notes :

View

Add Details

OBA : ☒ Secured

Quote : ☒ Sent Lead : ☐ Sent

Status* :

New
Existing
Extension
Lost
Dead

Submit

Compulsory fields are indicated with an asterix *

THANK YOU

IN CASE YOU NEED ANY ASSISTANCE PLEASE REACH OUT TO VISION SRT DEVELOPMENT TEAM.