PORT PRO AND SALESFORCE PROFESSIONAL INTEGRATION

www.jyctrucking.com

SALESFORCE LICENSE LEVEL: PROFESSIONAL

PORT PRO API DOCUMENT

https://documentation.app.portpro.io/#introduction

NEEDS

JYC needs one-way integration from Port Pro to Salesforce either by direct API calls or via a third-party middleware. The API calls can happen 1x/day at the end of the business day (5pm local time)

API'S THAT WILL BE NEEDED

Customer Profile API

- Account Alignment by Sales Agent/Rep (Tahnee, Miguel, Arelis, Malory, Carlos – these names are also on Salesforce)
- Fields to include:
    o Company Name
    o Main Contact
    o Address
    o Email Address (Email and Customer Portal Admin Login)
    o Billing Email
    o Payment Terms

Invoice Data API

- Total Revenue by Customer
- Total Revenue by service: Drayage Line Haul, Bonded Cargo, Transload, Hazmat, Cross border, Reefer
- Total Revenue by Line Haul/Accessorial Types: Pre-pull, storage, chassis, flip charge, admin, pier pass, clean truck fee, etc.
- Total Revenue by Load Type: Import vs Export

Container Data API

    o Container #
    o Steamship Line (SSL)
    o Consignee Address
    o Reference #
    o Import vs Export

o   MBOL (for imports)
  o   BOL (for exports)

CUSTOMER LIST SIZE

  o   ~200 customers

CONTAINERS COMPLETED

  o   ~1933

SALESFORCE DASHBOARDS NEEDED

For Admins: Carlos and Tahnee (should be able to see everyone's data aggregately)

SALES TAB

Revenue Report by Customer

Filters: Weekly, Monthly, Quarterly, Yearly

Graph Type: Bar

*This should include the service and accessorial charges.

COMPENSABLE REVENUE ITEMS TO INCLUDE

Drayage line haul, fuel, bonded, reefer, bonded cargo, hazmat class 9, cross border, pre-pull, load storage, empty storage, chassis, triaxle, overweight, heavy container fee, residential surcharge,

NON-COMPENSABLE REVENUE ITEMS TO EXCLUDE

per diem, pier pass fee, clean truck fee, port detention, delivery detention, scale ticket, per diem, transload, flip, redelivery, dry run, waiting time, pier congestion, weight redistribution, stop off, drop charge. These are non-compensable items for the sales representative.

**Charge Codes can be found in PP under Settings and Accounting Configuration

Revenue Report by Service

Services: Drayage Line Haul, Bonded Cargo, Transload, Hazmat, Cross border, Reefer

Filters: Weekly, Monthly, Quarterly, Yearly

Graph Type: Bar

Revenue Report by Accessorial

Accessorial: Pre-pull, load storage, empty storage, chassis, triaxle, overweight, heavy container fee, residential surcharge

Services: Drayage Line Haul, Bonded Cargo, Transload, Hazmat, Cross border, Reefer

Filters: Weekly, Monthly, Quarterly, Yearly

Graph Type: Bar

<mark>Opportunity Pipeline</mark>

*We can use the Salesforce Pipeline Template, no new info needed to be brought in from PP.

<mark>Contacts Made: Dials and Talk Time (integration from Dialpad)</mark>

Filter: Weekly, Monthly, Quarterly, Yearly

For Account Executive: Miguel and Arelis

Same as above but it should be for their own individual account alignment

FINANCE TAB – future project

OPERATIONS TAB – future project

ACCOUNTING TAB – future project