



**Get in touch**

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## T-OIL FROM TRIAD

**Integrated Solutions for Oil and Gas companies  
for Agency management and EPCIC  
(Engineering, Procurement, Construction,  
Installation & Commissioning activities.)**



## Why T-OIL

- Oil Industry getting competitive with falling prices – working smarter no longer a choice but a clear mandate
- Preconfigured processes
- Pre-defined profiles with roles and responsibilities
- Report Pack, forms and Templates pack
- Pre-configured notifications and escalations
- Integrated solution based on – Sage 300 ERP + Sage CRM
- Rapid implementation – less than 2 weeks
- Cost effective – low investment

## Areas covered by T-OIL

- Pre-qualification of Vendors/products with prospective customers
- Tender and Enquiry management
- Manage contacts, Track emails, store documents
- Approval management
- RFQ and Bid management
- Identify landed costs and markups – track margins for a shipment
- Deliver from stock or do direct drop shipments
- Long term contracts and delivery call-offs
- Tracking serial numbers and warranty.



# ENQUIRY SUMMARY



**Opportunity:** 25 butterfly valves  
**Company:** Bargain Mart - San Diego  
**Person:** Jose Grange

**Phone:** 301

**ERP Company Profile:** Demo Company

**Customer Number:** 500

**Enquiry No.:** 15.500.004

**Stage:** TO Approved

Summary | Item Master | RFQ | Pricing | Technical Offer | Shipment Cost | Quotation | Notes | Communications | Documents | Tracking | Relationships | ...

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## For

**Company:**  
[Bargain Mart - San Diego](#) 4084518981

**Person:**  
[Jose Grange](#) 301

## Details

**Enquiry No.:**  
15.500.004

### Details:

**Description:**  
25 butterfly valves

**Opened:**  
21.01.2015 4:45 PM

**Territory:**  
Worldwide

**End User Ref.:**

**Source:**  
Fax

**Offer Submission Date:**  
05.02.2015 4:45 PM

**No. of Line Items:**  
2

**Customer Ref:**  
22/vfd

**Type:**  
Primary

### End User:

[National Petroleum](#)

## Status

**Stage:**  
TO Approved

**Assigned To:**  
Sales Manager

**Status:**  
In Progress

**Team:**  
Sales

**Forecast:**  
€ 7,800.00

**Priority:**  
Normal

**Certainty%:**  
10

**Close By:**  
22.03.2015 4:46 PM

- Change
- Continue
- Next
- Export to Word
- Summary Report
- Alternate Opportunity
- Duplicate Opportunity
- Help

**Actions:**  
**Current State:** TO Approved

Enquiry from client > Enter Enquiry , assign to sales executive



# ENQUIRY RELATED DOCUMENT STORAGE



**Opportunity:** 25 butterfly valves  
**Company:** Bargain Mart - San Diego  
**Person:** Jose Grange

**Phone:** 301

**ERP Company Profile:** Demo Company

**Customer Number:** 500






**Enquiry No.:** 15.500.004

**Stage:** TO Approved

- Summary
- Item Master
- RFQ
- Pricing
- Technical Offer
- Shipment Cost
- Quotation
- Notes
- Communications
- Documents**
- Tracking
- Relationships
- ...

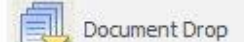
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5 Documents Found, Page 1 of 1

|  | Updated ▾             | File                                      | Type                | Category | Owner                 | Description             | Status |
|--|-----------------------|---|---------------------|----------|-----------------------|-------------------------|--------|
|    | 21.01.2015<br>5:31 PM | <a href="#">TO.15.500.004.pdf</a>         | Technical Offer     | Sales    | System Administrator  | TechnicalOffer Document | Final  |
|    | 21.01.2015<br>5:31 PM | <a href="#">TO.15.500.004.pdf</a>         | Technical Offer     | Sales    | System Administrator  | TechnicalOffer Document | Final  |
|    | 21.01.2015<br>5:03 PM | <a href="#">RFQ15.500.004.pdf</a>         | RFQ                 | Sales    | Procurement Executive | RFQ DOCUMENT            | Final  |
|    | 21.01.2015<br>5:00 PM | <a href="#">RFQ15.500.004.pdf</a>         | RFQ                 | Sales    | Procurement Executive | RFQ DOCUMENT            | Final  |
|  | 21.01.2015<br>4:54 PM | <a href="#">ItemMaster.15.500.004.xls</a> | Shipping Cost Sheet | Sales    | Sales Manager         | ITEM MASTER DOCUMENT    | Final  |

Owner:

--All--



Store Documents in context to enquiry

# ENQUIRY DETAILS



|                             |                       | Line No. | Man. Item No.  | Brand | Model Number | Type | Free Text | ERP Item No.             | ERP Description                     | Customer Description                |
|-----------------------------|-----------------------|----------|----------------|-------|--------------|------|-----------|--------------------------|-------------------------------------|-------------------------------------|
|                             |                       | 1        | 0              | 0000  | 00000000106  |      |           | 000000000000106000000005 | WEIGHT, EMERG. GOVERNOR POS.004 , F | WEIGHT, EMERG. GOVERNOR POS.004 , F |
|                             |                       | 2        | 0              | 0000  | 00000000106  |      |           | 000000000000106000000056 | NUT, GLAND LOCKING , POS. 143 , F   | NUT, GLAND LOCKING , POS. 143 , F   |
|                             |                       | 3        | AT-12501-A / B | 0011  | 00000000040  |      |           | 001100000000040001000011 | SIEMENS MAXUM EDITION II ANALYZER   | SIEMENS MAXUM EDITION II ANALYZER   |
| <a href="#">Insert Rows</a> | <a href="#">Clear</a> |          |                |       |              |      |           |                          |                                     |                                     |

| UOM | Qty    | Long Description   | Last Purchase Price | From ERP |
|-----|--------|--|---------------------|----------|
| pcs | 12.00  | PARTS FOR "DRESSER-RAND" STEAM TURBINE, TYPE 24ZSA-1<br>REF. DRESSER-RAND, GERMANY<br><br>&nbs   | 0.00                | Yes      |
| pcs | 50.00  | PARTS FOR "DRESSER-RAND" STEAM TURBINE, TYPE 24ZSA-1<br>REF. DRESSER-RAND, GERMANY<br>Z-LINE OVERSPEED TRIP ASSY.<br><br>&nbs  | 0.00                | Yes      |
| pcs | 100.00 | Gas Chromatograph Synthesis gas to C-200.1<br>AT-12501-B Gas Chromatograph Synthesis gas to E-2004 (Included in AT-12501-A), GC-Trains: 8, Dual Airless, Detector: TCD<br>(AT-12501-B is INCLUDED in AT-12501-A) | 0.00                | Yes      |
|     |        | <input type="text"/>   |                     |          |

Enquiry details entered here.

Link to Inventory item or create an item on the fly (catalogue item)

Enter long descriptions

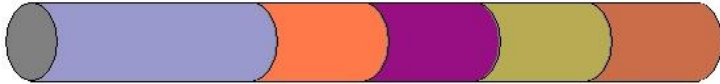


# SALES MANAGER PIPELINE

2 Notifications

Sage CRM My CRM for: Sales Manager

Recent Dashboard Calendar Contacts **Opportunities** Pending Opportunities Pending Approvals Shared Documents Preferences \*\*\*



■ Assigned (2) 
 ■ RFQ Generated (1) 
 ■ Bid Evaluation Completed (1) 
 ■ TO Approved (1) 
 ■ Pricing Completed (1)

**Statistics for All Stages**

|                                      |                                     |   |
|--------------------------------------|-------------------------------------|---|
| <b>No. Oppos:</b><br>6               | <b>Forecast:</b><br>€ 405,300.00    | <b>Weighted Fcst:</b><br>€ 186,555.00   |
| <b>Average Value:</b><br>€ 67,550.00 | <b>Average Certainty:</b><br>37.50% | <b>Weighted Average:</b><br>€ 25,331.25 |

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**6 Opportunities, Page 1 of 1**

| Opened                 | Status | Description                           | Company Name                             | Person                        | Stage                    | Type    | Priority | Territory                 |
|------------------------|--------|---------------------------------------|--|-------------------------------|--------------------------|---------|----------|---------------------------|
| 21.01.2015<br>4:45 PM  |        | <a href="#">25 butterfly valves</a>   | <a href="#">Barqain Mart - San Diego</a> | <a href="#">Jose Grange</a>   | TO Approved              | Primary | Normal   | <a href="#">Worldwide</a> |
| 20.01.2015<br>12:45 PM |        | <a href="#">Enquiry for valves</a>    | <a href="#">Barqain Mart - San Diego</a> | <a href="#">Jose Grange</a>   | Pricing Completed        | Primary | Normal   | <a href="#">Worldwide</a> |
| 19.01.2015<br>10:55 PM |        | <a href="#">Spare Parts - Pumps</a>   | <a href="#">Barqain Mart - San Diego</a> | <a href="#">Jose Grange</a>   | Assigned                 | Primary | Normal   | <a href="#">Worldwide</a> |
| 19.01.2015<br>10:50 PM |        | <a href="#">12" Valves - Urgent</a>   | <a href="#">Custom Comfort</a>           | <a href="#">Y. Kurth</a>      | RFQ Generated            | Primary | Normal   | <a href="#">Worldwide</a> |
| 19.01.2015<br>10:45 PM |        | <a href="#">New Enquiry</a>           | <a href="#">Break-Away Designs</a>       | <a href="#">Beth Anderson</a> | Assigned                 | Primary | Normal   | <a href="#">Worldwide</a> |
| 19.01.2015<br>10:10 PM |        | <a href="#">Enquiry for Chemicals</a> | <a href="#">Coastal Electric Company</a> | <a href="#">J. Everley</a>    | Bid Evaluation Completed | Primary | Normal   | <a href="#">Worldwide</a> |

Type: Primary  
Status: In Progress  
Stage: --All--  
Territory: --All--

Filter  
New Opportunity  
Help

Sales Manager can review pipeline by color coded Stages, navigate to any specific enquiry by clicking on the link

# RFQ MANAGEMENT



**Opportunity:** 25 butterfly valves

**Company:** Bargain Mart - San Diego

**Person:** Jose Grange

**Phone:** 301

**ERP Company Profile:** Demo Company

**Customer Number:** 500

**Enquiry No.:** 15.500.004

**Stage:** TO Approved

- Summary
- Item Master
- RFQ
- Pricing
- Technical Offer
- Shipment Cost
- Quotation
- Notes
- Communications
- Documents
- Tracking

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## RFQ Summary

**RFQ Number:**  
RFQ 15.500.004

**Vendor:**  
[Esser Engineering Ltd](#) 2165553997

1 RecordsFound, Page 1 of 1

| Item Number ^           | Manufacturer Item No | Brand | Customer Description              | UOM | Qty   | In ERP ? |
|-------------------------|----------------------|-------|-----------------------------------|-----|-------|----------|
| 00000000000010600000048 | 0                    | 0000  | VALVE & CAGE ASSY. , POS. 131 , F | pcs | 25.00 | Yes      |
|                         |                      |       |                                   |     |       |          |
|                         |                      |       |                                   |     |       |          |
|                         |                      |       |                                   |     |       |          |
|                         |                      |       |                                   |     |       |          |
|                         |                      |       |                                   |     |       |          |
|                         |                      |       |                                   |     |       |          |
|                         |                      |       |                                   |     |       |          |
|                         |                      |       |                                   |     |       |          |
|                         |                      |       |                                   |     |       |          |

Send RFQs to vendors – one or more enquiry lines can be sent to one or more vendors





# SHIPMENT & ADDITIONAL COST



**Opportunity:** 25 butterfly valves  
**Company:** Bargain Mart - San Diego  
**Person:** Jose Grange

**Phone:** 301

**ERP Company Profile:** Demo Company  
**Customer Number:** 500  
**Enquiry No.:** 15.500.004  
**Stage:** TO Approved

- Summary
- Item Master
- RFQ
- Pricing
- Technical Offer
- Shipment Cost
- Quotation
- Notes
- Communications
- Documents
- Tracking
- Relationships
- ...

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**Shipment Summary**

|                                     |   |                              |                            |
|-------------------------------------|---|------------------------------|----------------------------|
| <b>Job No.:</b><br>SH 15.500.004.S2 | <b>Vendor:</b><br><a href="#">Gould Manufacturing Ltd.</a> 8045557272 | <b>Delivery Point:</b>       | <b>Pick up Point:</b>      |
| <b>Origin:</b>                      | <b>Delivery Time:</b>   |                              |                            |
| <b>Gross Weight:</b><br>23.00       | <b>UOM:</b><br>Kilogram   | <b>Gross Volume:</b><br>0.00 | <b>UOM:</b><br>Cubic Meter |

Part of Landed Cost > Add Section 1  
 Landed Cost Part of PO > Add Section 2  
 Cost Items Part of Quote > Add Section 3  
 Continue

Section - 1 : Total Amount : 10000 (This amount will be carry forwarded to Pricing as Landed Cost Factor.)

1 RecordsFound

| Line No ^ | Other Vendor Id | Description | Charges Type                                     | Vendor Currency | Vendor Total Cost | Exchange Rate | Customer Total Cost |
|-----------|-----------------|-------------|--|-----------------|-------------------|---------------|---------------------|
| 1         | Deca Management |             | <a href="#">Document / Certification Charges</a> | 1               | 10,000.00         | 1.00          | 10,000.00           |

Additional costs – can be part of the inventory cost (landed cost), can be identified as a separate cost in the quote or remain uncharged on the customer (reimbursed by the vendor)



# FINAL PRICING TABLE BASED ON VENDOR QUOTE



**Opportunity:** 25 butterfly valves  
**Company:** Bargain Mart - San Diego  
**Person:** Jose Grange

**Phone:** 301

**ERP Company Profile:** Demo Company  
**Customer Number:** 500  
**Enquiry No.:** 15.500.004  
**Stage:** TO Approved

|         |             |     |                |                 |               |           |       |                |           |          |               |
|---------|-------------|-----|----------------|-----------------|---------------|-----------|-------|----------------|-----------|----------|---------------|
| Summary | Item Master | RFQ | <b>Pricing</b> | Technical Offer | Shipment Cost | Quotation | Notes | Communications | Documents | Tracking | Relationships |
|---------|-------------|-----|----------------|-----------------|---------------|-----------|-------|----------------|-----------|----------|---------------|

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Header Markup :

| Line No. | Man. Item No. | Description                       | UOM | Vendor                          | Vendor Currency | Exchange Rate | Qty   | Unitprice-Vendor | Gross Price-Vendor |
|----------|---------------|-----------------------------------|-----|---------------------------------|-----------------|---------------|-------|------------------|--------------------|
| 1        | 0             | VALVE & CAGE ASSY. , POS. 131 , F | pcs | 0008 - Esser Engineering Ltd    | EUR(€)          | 1.000         | 25.00 | 78.00            | 1,950.00           |
| 2        |               | Butterfly valves                  | qty | 0005 - Gould Manufacturing Ltd. | USD(\$)         | 0.844         | 30.00 | 90.00            | 2,700.00           |

| Gross Price-Vendor | Unit Cost in Customer Currency (EUR) | Total Cost in Customer Currency | Landed Cost | Cost Inclu. L.C | Margin (%) | Total Margin Value | Unit Price | Gross Price |
|--------------------|--------------------------------------|---------------------------------|-------------|-----------------|------------|--------------------|------------|-------------|
| 1,950.00           | 78.00                                | 1,950.00                        | 4,611.89    | 6,561.89        | 25.00      | 1640.47            | 328.09     | 8,202.37    |
| 2,700.00           | 75.94                                | 2,278.20                        | 5,388.11    | 7,666.31        | 25.00      | 1916.58            | 319.43     | 9,582.89    |
|                    |                                      | 4228.2                          | 10000       | 14228.2         | 25.00      | 3557.05            |            | 17785.26    |

Clear Landed Cost calculation with support for multi currency.



# QUOTE CONVERTED TO ERP SALES ORDER



**Opportunity:** Spare Parts - Mechanical  
**Company:** Bargain Mart - San Diego  
**Person:** Jose Grange

**Phone:** 301

**ERP Company Profile:** Demo Company  
**Customer Number:** 500  
**Enquiry No.:** 15,500.002  
**Stage:** Purchase Order

## Quotation Summary

|   |   |  |   |  |
|---|---|--|---|--|
| <b>Quote Number:</b><br>QE 15.500.002   | <b>Quote Date:</b><br>19.01.2015          | <b>Payment Terms:</b><br>100% Advance  | <b>Currency:</b><br>EUR                 | <b>Sales Person:</b><br>Sales Executive                          |
| <b>Bank Information:</b><br>HSBC Bank Middle East<br>Dubai Branch<br>Dubai, UAE<br>Swift No: AAAA BBBB<br>EUR Account No. 000 000 000<br>IBAN: 00000000000000000000000000000000 | <b>Validity:</b><br>2 Months              | <b>Validity Date:</b><br>19.03.2015    | <b>Sales Order Ref No:</b><br>ORD140035 |  |
| <b>Delivery Terms:</b>  | <b>Delivery Time:</b>                     | <b>Country of Origin:</b>              | <b>Tariff No:</b>                       | <b>Primary Quotation:</b><br><input checked="" type="checkbox"/> |
| <b>Notes:</b>   | <b>Total Discount (%):</b><br>1.82        | <b>Total Discount Amount:</b><br>27.75 | <b>Total Sum:</b><br>1800.00            |  |
| <b>PO Number:</b><br>PO140045 0002 Excide Industrial Batteries  | <b>Pay Term Description:</b> 100% Advance |  |   |  |

Convert customer sales order to ERP sales Order – no retyping



Purchase Orders on the vendor can be generated from ERP

## Sales Order Information

|  |  |
|--|--|
| <b>Ship to Location Address 1:</b><br>Ship to Location | <b>Ship to Location Address 2:</b><br>Ship to Location Address 2 |
| <b>Location:</b><br>L01                                | <b>Delivery:</b><br>2 Months                                     |
| <b>Agent Address 1:</b>                                | <b>Agent Address 2:</b>  |
|  | <b>Agent Address 3:</b>  |
|  | <b>Delivery Date &amp; Time:</b><br>19.03.2015 12:00 PM          |
|  | <b>Expected Ship Date:</b><br>31.01.2015 12:00 PM                |
|  | <b>Final Destination:</b>  |

## Item Detail List

1 RecordsFound

| Line No ^ | Item Number              | Description                           | UOM | Qty  | Margin % | Unit Price | Gross Price | Discount (%) | Net Price |
|-----------|--------------------------|---------------------------------------|-----|------|----------|------------|-------------|--------------|-----------|
| 1         | 000000000000106000000013 | SPACER, THRUST BEARING , POS. 018 , F | pcs | 2.00 | 22.22    | 763.88     | 1,527.75    | 1.82         | 1,500.00  |

## Other Charges List

1 RecordsFound

| Line No ^ | Category          | Total Cost |
|-----------|-------------------|------------|
| 1         | Insurance Charges | 300.00     |

# MARKUP MATRIX



My CRM for: **System Administrator** ▼

- Dashboard
- Calendar
- Contacts
- Leads
- Opportunities
- Markup Matrix**
- PO Approval
- Pending Opportunities
- Pending Approvals
- On Hold Orders

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6 Records Found, Page 1 of 1

| Tiers ^ | Total From                 | Total To         | Mark Up | Approve By SM? | Approve By GM? | Notification Sent To |
|---------|----------------------------|------------------|---------|----------------|----------------|----------------------|
| 1       | <a href="#">0.00</a>       | 2,000.00         | 200.00  |                |                | System Administrator |
| 2       | <a href="#">2,001.00</a>   | 5,000.00         | 25.00   |                |                | System Administrator |
| 3       | <a href="#">5,001.00</a>   | 20,000.00        | 20.00   | Y              |                | General Manager      |
| 4       | <a href="#">20,001.00</a>  | 50,000.00        | 17.00   | Y              | Y              |                      |
| 5       | <a href="#">50,001.00</a>  | 200,000.00       | 15.00   | Y              | Y              |                      |
| 6       | <a href="#">200,001.00</a> | 1,000,000,000.00 | 10.00   | Y              | Y              |                      |
|         |                            |                  |         |                |                |                      |
|         |                            |                  |         |                |                |                      |
|         |                            |                  |         |                |                |                      |

Manage markups centrally – controlled access, define approval matrix for high value deals

# TECHNICAL OFFER



**Opportunity:** 25 butterfly valves  
**Company:** Bargain Mart - San Diego  
**Person:** Jose Grange

**Phone:** 301

**ERP Company Profile:** Demo Company  
**Customer Number:** 500  
**Enquiry No.:** 15.500.004  
**Stage:** TO Approved

|         |             |     |         |                 |               |           |       |                |           |          |               |
|---------|-------------|-----|---------|-----------------|---------------|-----------|-------|----------------|-----------|----------|---------------|
| Summary | Item Master | RFQ | Pricing | Technical Offer | Shipment Cost | Quotation | Notes | Communications | Documents | Tracking | Relationships |
|---------|-------------|-----|---------|-----------------|---------------|-----------|-------|----------------|-----------|----------|---------------|

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## Technical Offer Summary

**Technical Offer No:**  
TO.15.500.004

**Note:**  
notes

1 Records Found, Page 1 of 1

| Manufacturer Item No. ^ | Description                       | Brand | Quantity | UOM | Available in ERP? |
|-------------------------|-----------------------------------|-------|----------|-----|-------------------|
| 0                       | VALVE & CAGE ASSY. , POS. 131 , F | 0000  | 25.00    | pcs | Yes               |
|                         |                                   |       |          |     |                   |
|                         |                                   |       |          |     |                   |

Optional step – send technical offer without pricing

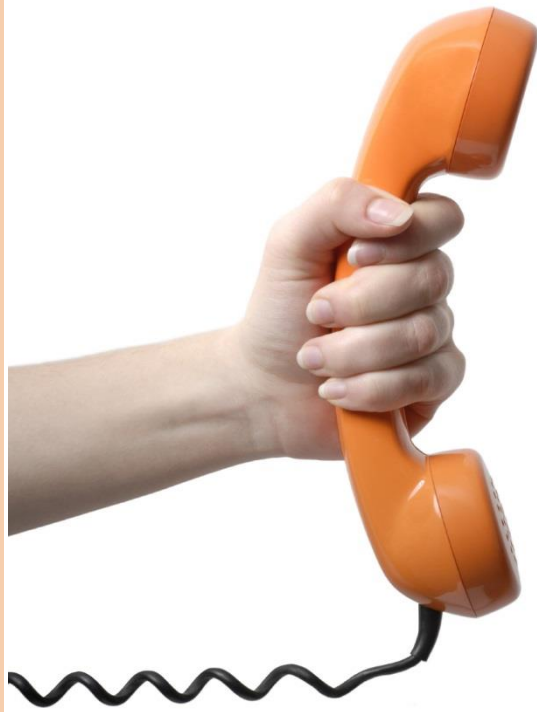
# CONTACT US

## Triad Software Services

**Call: +971 50 6570454**

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**[www.triadme.com](http://www.triadme.com)**



**THANK YOU**

