FORMAG BAKU

User guide
for sales managers

From first sign-in to confirmed order

A step-by-step operating standard for colleagues who are new to logistics and to the current Formag system.

WORKFLOW

01	02	03	04	05	06	07
Sign-in	Database	Request	Agents	Rates	Quotation	Booked

EDITION	**Google Workspace + n8n**
VERSION	**1.0**
DATE	**25 July 2026**
CLASSIFICATION	**Internal use only**

Only the administrator may change system fields, formulas, triggers, webhooks, or access permissions.

How to use this guide

This guide covers the complete sales workflow: signing in to the internal portal, registering counterparties, requesting rates from agents, sending a quotation to the client, and handing a confirmed order over to Operations.

It is written for colleagues who may be new to both logistics and the current Formag system. Follow the steps in sequence. Button, tab, field, and status names are shown exactly as they appear in the live tools.

> **Core principle:** enter commercial data only through the approved forms and editable working fields. Never change formulas, headers, hidden sheets, webhooks, triggers, or system statuses manually.

Contents

1. What the system does

The current system connects the internal `formag.az` portal, Google Forms, personal Google Sheets, shared workbooks, Apps Script, corporate email, and n8n.

The workflow is:

Sign-in -> client and agent registration -> request creation -> agent selection -> automated email request -> rate collection -> quotation preparation -> client submission -> order confirmation -> Operations handover.

The system automatically:

- opens the correct personal Quotation workbook for each sales manager after sign-in;
- records form data in the shared databases;
- shows each manager the Freight Quote Requests assigned to them;
- passes the selected request to n8n;
- sends the request to the selected agents from the manager's corporate mailbox;
- attaches uploaded cargo documents when available;
- clears the agent-selection checkboxes after sending;
- transfers new requests to **`Sales Quotation`**;
- creates a client PDF quotation and emails it;
- stores request, quotation, and order statuses;
- makes it possible to transfer a booked shipment to the relevant Operations workflow.

The system does not make commercial decisions for you. Formag employees remain responsible for choosing an agent, checking the rate, applying the approved margin, setting the offer conditions, and deciding when a deal may be marked **`Booked`**.

2. Roles and responsibilities

Role	Main responsibility
Sales Manager	Registers clients, creates Freight Quote Requests, selects suitable agents, follows up on replies, coordinates the client offer, and records the outcome of the opportunity.
Pricing / Sales Team	Reviews agent rates, calculates the final selling price, confirms the commercial conditions, and prepares the quotation.
Operations Manager	Takes over a confirmed order, controls booking and cargo movement, and updates operational milestones.
Finance	Performs financial and invoicing work after order confirmation, in line with the internal process.
System Administrator	Manages access, reference data, formulas, Apps Script, n8n, webhooks, triggers, and controlled error recovery.

> **Important:** the central workbook is for monitoring and reporting. A sales manager sends requests and performs daily work only from their personal workbook.

3. Preparing for your first task

Before starting work, you must have:

1. An approved Google account added to the portal allowlist.
2. `Editor` access to your personal Quotation workbook.
3. Access to the Formag corporate mailbox used for agent and client correspondence.
4. Role-appropriate access to `Sales`, `Operation`, `Client List`, and `CRM`.
5. Confirmation from the administrator that your personal workflow and email credential are configured.

Before your first live request:

- open `formag.az`;
- sign in with your approved Google account;
- click `Quotation`;
- confirm that the workbook belongs to you;
- confirm that the `Requests` and `Agents` tabs are available;
- open your corporate mailbox in a separate browser tab.

If another manager's workbook, the central workbook, or `Access denied` opens, stop. Do not enter data. Follow the safe-recovery steps in section 20.

4. Signing in to the portal

4.1. Sign-in

1. Open `https://formag.az`.
2. On the `Welcome Back` page, click `Sign in with Google`.
3. Choose the work Google account approved by the administrator.
4. Wait for the access check.
5. After successful verification, the Formag Dashboard opens.

If your email is not in the allowlist, the portal ends the session and shows an access-denied message.

4.2. Confirming the correct account

When several Google accounts are active in the same browser, the portal and Google Drive can use different sessions.

After signing in:

1. Click `Quotation`.
2. Check the Google avatar in the upper-right corner of the workbook.
3. Confirm that your work account is active.
4. If Google asks you to choose an account, select the account that owns your personal workbook access.

> **Expected result:** `Quotation` opens the personal workbook assigned to that manager, not the central summary.

4.3. Signing out

When you finish work on a shared computer:

1. Return to the portal.
2. Click `Log Out`.
3. Sign out of the Google account as well when necessary.

5. Main portal sections

Section	Purpose
`Get Offer`	Creates a Freight Quote Request from a client inquiry.
`Quotation`	Opens the manager's personal workbook with `Requests` and `Agents`.
`Sales`	Shared workspace for preparing and sending client quotations.
`Operation`	Operational sheets used after an order is confirmed.
`Finance`	Financial workspace, available according to the user's role.
`Client List`	Client database and related details.
`CRM`	Client activity and portfolio management.
`Agent Registration Form`	Adds a new agent to the agent database.
`Client Registration Form`	Adds a new client to the client database.

Other portal elements, such as the average-rate map, exchange rates, AI tools, and WhatsApp Sender, are supporting tools. They do not replace route validation, rate checking, or commercial approval.

6. Data-entry rules

6.1. General rules

- Use the company's official legal or trading name, not an informal abbreviation from a message.
- Check every email address for spelling errors before submitting a form.
- Separate multiple email addresses with commas.
- Select the country from the provided list; do not invent a new spelling.
- Enter a precise origin and destination.
- Always include units such as `kg`, `t`, `cm`, `m`, or `m3`.
- Write monetary values with the currency, for example `USD 2,500` or `EUR 1,800`.
- Dates and deadlines must be unambiguous.
- Use the sales-manager name exactly as it appears in the dropdown list.

6.2. Before creating a record

Before registering an agent or client, search by:

1. Official company name.

2. Main email address or corporate domain.
3. Tax ID, VAT, TIN, or another registration number when available.

If the record already exists, do not create a duplicate. Ask the administrator or database owner to update the existing contact.

6.3. Data that must not be entered

Never put the following in forms or sheets:

- passwords;
- verification codes or OTPs;
- API keys or webhook secrets;
- bank-card details;
- personal identity documents without a valid business need;
- unverified allegations about a counterparty;
- information unrelated to the shipment.

7. Registering a new agent

7.1. What is an agent?

An agent is a logistics partner, carrier, freight forwarder, terminal, or other organisation that can provide a rate or perform part of the shipment.

Being listed in the database does not mean that the agent has passed a reliability review. Registration creates a contact record; commercial and legal checks remain separate.

7.2. Duplicate check

1. Open `Quotation` from the portal.
2. Go to `Agents`.
3. Search for the company name in Google Sheets.
4. Search again by the main email address.
5. If the agent exists, use the existing record.

Do not edit imported agent columns manually.

7.3. Completing Agent Registration Form

1. Click `Agent Registration Form` on the portal.
2. Enter the official `Agent / Company Name`.
3. Select the `Country`.
4. Under `Transportation Type`, select every service the agent genuinely provides.
5. Enter the `Main E-Mail address`.
6. Add `Cc E-Mail address (with a comma ,)` when required.
7. Recheck the company name and email addresses.
8. Click `Submit` once.

Transportation types include:

- `FCL` - full container load;
- `LCL` - less than container load;
- `FTL` - full truck load;
- `LTL` - less than truck load;
- `Air` - air freight;
- `Rail` - rail freight;
- `Break Bulk` - non-containerised general cargo;
- `Project` - project or oversized cargo;
- `DG-cargo` - dangerous goods.

7.4. Verifying the result

1. Wait a few minutes.
2. Refresh `Agents`.

3. Find the agent by name or email.
4. Confirm that the country, transport types, and contacts are correct.

If the record does not appear, do not immediately submit the form again. Note the agent name, submission time, and your account, then contact the administrator.

> **Current limitation:** the agent form does not pass the submitter's Google identity to the form owner. Do not complete it on behalf of another employee. Tell the administrator whenever the author of a record must be established.

8. Registering a new client

8.1. What is a client?

A client is a company, or an individual allowed under internal policy, that requests a rate and may book transport services from Formag.

8.2. Duplicate check

1. Open `Client List` or `CRM`.
2. Search by the official client name.
3. Check the Tax ID and main email address.
4. If the client exists, use the existing record.

8.3. Completing Client Registration Form

1. Click `Client Registration Form`.
2. Enter the official client name in `Full name`.
3. Enter the main contact email in `Contact (new) e-mail`.
4. Add CC addresses in `E-mail (with comma ,)` when needed.
5. Enter the mobile number with country code in `Contact (new) mobile`.
6. Complete `Telephone` when available.
7. Enter the `Client Tax ID`.
8. Complete `Address`.
9. Add the `Website` when available.
10. Use `Conditions (optional)` for agreed commercial terms or important limitations.
11. Select yourself in `Sales Manager`.
12. Review the data and click `Submit` once.

If your name is missing from `Sales Manager`, do not choose another employee. Ask the administrator to update the reference list.

8.4. Verifying the result

1. Wait a few minutes.
2. Open `Client List`.
3. Find the client by name, email, or Tax ID.
4. Check the assigned sales manager.

Register the client before preparing the final quotation, because the Sales workbook uses the client database for contact details.

9. Creating a Freight Quote Request

9.1. Information required from the client

Collect at least:

- client name;
- route;
- operation type: Import, Export, or Transit;
- Incoterms;
- transport mode;
- container, truck, or equipment type;
- cargo description;
- number of packages;
- weight and dimensions;
- HS Code, when available;
- loading address;
- preferred dates;
- special conditions;
- cargo documents, when available.

If essential information is missing, ask the client for clarification before creating the request. An incomplete inquiry leads to inaccurate rates and unnecessary follow-up.

9.2. Completing the form

1. Click `Get Offer`.
2. Complete the fields in this order.

Field	How to complete it
`Date`	Date the request was received or created.
`Client's Company Name`	Official client name.
`Incoterms`	The term confirmed by the client or contract. Do not guess.
`Operation Type`	`Import`, `Export`, or `Transit`.
`Transportation Type`	Select the transport modes actually being considered.
`Equipment / Transport Unit`	Select the required container, truck, reefer, flat bed, low bed, or other unit.
`Route (Origin-Destination)`	Precise origin and destination, for example `Shanghai, CN -> Baku, AZ`.
`Commodity Name`	Clear cargo description.
`HS Code`	One code or several codes separated by commas.

Field	How to complete it
`Dimensions / Weight`	Package count, dimensions for each package type, gross weight, and volume.
`Invoice Value`	Cargo value and currency, when known.
`Origin / Loading Location`	Exact loading address or terminal.
`Notes`	Cargo-ready date, DG status, temperature, stackable/non-stackable, and other conditions.
`Sales Manager`	Select yourself.
`Please upload documents...`	Add invoice, packing list, MSDS, photos, drawings, or other relevant cargo documents.

1. Review every field.
2. Click `Submit` once.
3. Keep the form confirmation until the request appears in the workbook.

9.3. Choosing Incoterms

Quick guidance:

- `EXW` - collection from the seller's premises;
- `FCA` - delivery to the carrier at the agreed place;
- `FOB` - delivery on board the vessel, for sea transport;
- `CFR` / `CIF` - sea freight to the destination port; CIF includes insurance to the extent required by the rule;
- `CPT` / `CIP` - carriage paid to the named place; CIP includes insurance to the extent required by the rule;
- `DAP` - delivery to the named place without seller-paid import clearance and duties;
- `DPU` - delivery and unloading at the named place;
- `DDP` - the seller assumes the broadest delivery obligations, including import formalities where legally possible.

Incoterms determines the division of cost, responsibility, and risk. If the client has not confirmed the term, request written clarification.

9.4. Check after submission

The new inquiry enters the shared system and then appears in the selected manager's personal workbook.

1. Return to the portal.
2. Open `Quotation`.
3. Go to `Requests`.
4. Refresh the sheet.
5. Find the row by client, route, and date.
6. Record the `Request ID`.

If your name is missing from the form, do not submit under a colleague's name. The administrator must add the correct name.

10. Working in your personal Quotation workbook

The personal workbook has two main tabs:

- `Requests` - inquiries assigned to that sales manager;
- `Agents` - the shared agent directory used to select recipients.

10.1. Requests

Column	Meaning
`Request ID`	Unique inquiry identifier used in emails and searches.
`Date`	Request date.
`Client's Name`	Client.
`Incoterms`	Delivery term.
`Import/Export/Transit`	Operation type.
`Transportation Type`	Transport mode.
`Container / Truck Type`	Equipment.
`Route`	Route.
`Commodity`	Cargo.
`HS Code`	Commodity code.
`Dimensions/Weight`	Cargo dimensions and weight.
`Invoice Value`	Cargo value.
`Loading address`	Loading point.
`Notes`	Additional conditions.
`Uploaded Files`	Link to uploaded documents.
`Sent Status`	System result of the agent mailing.
`Sales Manager`	Responsible employee.
`Sales Manager Email`	Responsible employee's email.
`✅ Send to Agent`	Working checkbox that starts the agent mailing.

Request data is imported automatically. Do not insert or delete rows, sort the entire sheet, or replace formulas with static values.

10.2. Fields you may use

In the standard workflow, a sales manager:

- selects agents with the `Send` checkboxes on `Agents`;
- starts the mailing with `✅ Send to Agent` in the correct `Requests` row;
- reads `Sent Status`;
- opens uploaded-document links;

- reviews the request information.

Other checkboxes and system fields are used only under a separate administrator instruction.

> **Do not use:** ✅ `Update Request Details`. In the current release it is not a standard user function for resending a request.

11. Selecting agents

11.1. Selection criteria

Consider:

- country and actual route coverage;
- transport mode;
- experience with the cargo type;
- required equipment availability;
- quality and speed of previous replies;
- commercial conditions;
- available evidence of registration, licences, or membership;
- consistency of company name, domain, and registration details.

The lowest price is not always the best choice.

11.2. Using Agents

1. Open `Agents`.
2. Filter or search by `Country`.
3. Narrow the list by `Transportation Type`.
4. Check `Agent / Company Name`.
5. Check `Main Email`.
6. Check `CC Emails`.
7. Tick `Send` for each selected agent.
8. Review the `Selected Checkbox` counter.

Build a short, relevant list instead of mailing every agent in a country. The number of recipients depends on the request and Pricing policy.

Do not change the base columns containing company name, country, transport type, or email. Send outdated-contact corrections to the database owner.

11.3. Additional CC

Use `Any Cc Emails` only for an approved address required for that mailing. Separate multiple addresses with commas.

The sales manager's email is added to CC automatically from the request row.

12. Sending a request to agents

12.1. Final check

Before starting:

- confirm the correct request row;
- confirm that the `Request ID` belongs to the intended client;
- check the route and transport mode;
- confirm that uploaded files open;
- confirm the selected agents;
- check that agent email fields are not empty;
- confirm that `Sent Status` does not already contain a previous result.

12.2. Start the mailing

1. After selecting agents, return to `Requests`.
2. Find the correct `Request ID`.
3. Tick `✅ Send to Agent` in that same row.
4. Do not click another checkbox.
5. Wait for the system notification.
6. Do not close the tab immediately.

The system sends one package to the manager's personal webhook. n8n separates the agent list and sends the emails sequentially from the manager's corporate mailbox.

Email subject:

`Freight Request: [Request ID] - [Route]`

The email contains the cargo details and asks the agent to confirm:

- pre-notice;
- transit time;
- routing;
- free days;
- demurrage;
- storage;
- carrier;
- equipment availability;
- ETD or validity;
- ADR and other surcharges;
- telex-release fee;
- important remarks.

12.3. Signs of a successful mailing

- `Sent Status` becomes `Sent to Agents`;
- the start checkbox returns to the off state;

- selected-agent checkboxes are cleared gradually;
- the emails appear in the corporate mailbox `Sent` folder;
- the sales manager is included in CC.

Sending to several agents can take a few minutes. Do not click again while the workflow is running.

12.4. Duplicate-send protection

If `Sent Status` already has a value, the system blocks another mailing for that row. Never delete the status manually.

For a corrected or repeat request:

1. Do not clear system cells.
2. Record the `Request ID`.
3. Prepare a clear list of changes.
4. Ask the administrator or Pricing to use the approved resend process.

13. Receiving and comparing rates

Agent replies arrive in the corporate mailbox. In the current release, an ordinary agent reply does not automatically become a confirmed commercial rate in the workbook.

13.1. Linking a reply

1. Find the `Request ID` in the email subject.
2. Match the route and client.
3. Keep the complete email thread.
4. Never combine offers from different Request IDs.

13.2. Completeness check

Check	What must be clear
Base rate	Amount and currency.
Included / excluded	Origin, destination, terminal, documentation, customs, delivery, and other charges.
Route	Actual routing and transshipment.
Transit time	Expected transport duration.
Validity	Last valid date of the rate.
Schedule / ETD	Available departure.
Equipment	Type and availability.
Free time	Free days at origin and destination.
Demurrage / detention	Charges after free time.
Dangerous goods	Acceptance and ADR/DG charges.

Check	What must be clear
Payment terms	Prepayment, credit, and payment period.
Taxes	Whether VAT and local taxes are included.
Additional risks	Peak season, congestion, storage, inspection, overweight, and other conditions.

Ask the agent for clarification before pricing whenever a material point is unclear.

13.3. Comparison

Use the same basis for every offer:

1. Convert rates to one currency.
2. Add mandatory local costs.
3. Confirm the same service scope.
4. Compare transit time and validity.
5. Consider payment terms and operational risk.
6. Record the selected option and the reason for choosing it.

14. Preparing a client quotation

New requests enter `Sales`, on the `Sales Quotation` sheet, automatically.

14.1. Finding the request

1. Open `Sales`.
2. Go to `Sales Quotation`.
3. Find the `Request ID`.
4. Check the client, route, and sales manager.
5. If the row is not yet present, refresh after a few minutes.

Do not create a second row with the same Request ID manually.

14.2. Fields required before sending

Field	Requirement
`Client's Name`	Select the correct client or contact under the approved process.
`Client's Email`	Main quotation recipient. Always verify it.
`CC Emails`	Additional recipients, separated by commas.
`Price Offer`	Final selling price with currency and pricing unit.
`Remarks`	Validity, transit, free time, inclusions, exclusions, and special conditions.
`Status of Offer`	Keep `Pending` until the client decides.
`BK-number`	Do not treat it as a confirmed booking until the order is accepted and a number is assigned.

14.3. Commercial control

Before sending, confirm that:

- the agent rate is still valid;
- the approved margin has been applied;
- the currency is explicit;
- the pricing unit is clear: `per container`, `per truck`, `per kg`, `per shipment`, or another unit;
- all mandatory local charges are shown;
- exclusions are listed separately;
- an estimated transit time is not presented as an unconditional guarantee;
- quotation validity is compatible with the agent's rate;
- the client contact is correct;
- no attachment or text contains another client's information.

15. Sending a quotation to the client

15.1. Start

1. Select the correct `Sales Quotation` row again.
2. Check `Client's Email`.
3. Check `Price Offer` and `Remarks`.
4. Tick ✅`Sent to Client`.
5. Click once and wait for the result.

The system:

- creates `Quotation_[Request ID].pdf`;
- emails the client;
- attaches the PDF;
- includes the sales manager and configured CC recipients;
- resets the checkbox;
- writes `Quotation was sent to Client` in `Sent Status`.

Client email subject:

`Quotation for [Client] | Quotation ID: [Request ID]`

15.2. Verification

1. Confirm that `Quotation was sent to Client` appears.
2. Check the email in `Sent`.
3. Open the attached PDF.
4. Verify the Request ID, client, route, price, and sales manager.
5. Keep the correspondence until the client decides.

The system must not send a quotation when the client email is empty. Enter a valid address and repeat the standard checks.

16. Converting a quotation into an order

A quotation becomes an order only after written client approval.

Acceptable evidence includes:

- an email with clear acceptance;
- a purchase order;
- a signed document;
- another written channel approved by the company.

A verbal instruction without written follow-up is not sufficient for `Booked`.

16.1. Changing the status

In `Sales Quotation`:

1. Find the row by `Request ID`.
2. Verify the client's written confirmation.
3. Change `Status of Offer`:

- `Booked` - the client confirmed the order;
- `Canceled` - the client declined or the inquiry ended;
- `Pending` - no final decision yet.

1. Enter the `BK-number` once it has been issued under the internal process.

The system highlights:

- `Booked` in green;
- `Canceled` in yellow;
- `Pending` older than 48 hours with a red reminder.

16.2. Checks before Booked

- final selling price confirmed;
- agent rate and availability reconfirmed;
- payment terms agreed;
- chosen agent recorded;
- cut-off and next schedule known;
- required documents identified;
- exclusions and additional costs recorded;
- Operations Manager assigned;
- correspondence and attachments available to the team.

17. Handing the order over to Operations

17.1. Required handover package

Provide Operations with:

- `Request ID`;
- `BK-number`;
- client name and contacts;
- written client confirmation;
- final quotation;
- selected agent and confirmed rate;
- route and Incoterms;
- transport mode and equipment;
- cargo details;
- invoice, packing list, MSDS, and other documents;
- cargo-ready date and cut-off;
- payment terms;
- special risks and promises made to the client.

17.2. Sales Quotation fields

Within the assigned role, the following must be defined:

- `POL`;
- `POL Agent`;
- `POL Agent Email`;
- `POL Agent Cc Emails`;
- `POD`;
- `POD Agent`, when applicable;
- `Operations Manager Name`;
- `Operations Manager Email`.

`Send Form to Agent` sends an operational status form to the selected agent. Use it only after the order is confirmed, BK-number is available, the agent is selected, and an Operations Manager is assigned.

17.3. Choosing the Operations sheet

Transport type	Operations sheet
Import FCL	`ImportFCL`
Transit FCL	`TransitFCL`
Export FCL	`ExportFCL`
Full Truck Load	`FTL`
Less Than Truck Load	`LTL`
Less Than Container Load	`LCL`
Air	`AIR`
Rail	`RailWay`

Sales hands over the order and continues client communication. The assigned Operations Manager updates operational dates, documents, and milestones unless an internal rule states otherwise.

18. Monitoring statuses

Status	Meaning	User action
Empty `Sent Status` in Requests	The request has not been sent to agents.	Select agents and complete the pre-send check.
`Sent to Agents`	n8n accepted and ran the normal mailing workflow.	Check `Sent` and wait for replies.
`Pending`	The quotation is being prepared or the client has not decided.	Follow up before validity expires.
`Quotation was sent to Client`	The client email and PDF were sent.	Check the message and monitor the reply.
`Booked`	The client confirmed the order in writing.	Complete the Operations handover.
`Canceled`	The opportunity ended.	Record the reason in the approved channel and close the follow-up.

Never delete or overwrite statuses created by automation.

19. What you must not change

A sales manager must not:

- work from the central summary instead of the personal workbook;
- rename sheets or columns;
- insert or delete columns;
- delete request rows;
- sort an entire imported range;
- edit formulas;
- open and edit hidden sheets;
- change `Config for Offers`;
- change Apps Script, triggers, or permissions;
- edit a webhook;
- delete `Sent Status` to bypass duplicate-send protection;
- mark a deal `Booked` without written confirmation;
- mass-mail the same request without a clear business need;
- create a duplicate agent or client instead of updating the existing record;
- share links or access with outsiders;
- use a colleague's account.

> **Recovery rule:** if you are not certain that a cell is intended for user input, do not change it. Record the Request ID and contact the administrator.

20. Common problems and safe recovery

20.1. The portal does not open

Check:

1. internet connection;
2. the address `https://formag.az`;
3. that JavaScript is not blocked;
4. the computer's date and time.

20.2. Access Denied after sign-in

Likely cause: the email is not in `allowed_users`, or a different account was selected.

1. Sign out of the portal.
2. Sign in with the work account.
3. If the error remains, send the exact Google email to the administrator.

20.3. Quotation opens the wrong workbook

1. Check the Google account in the upper-right corner.
2. Close the incorrect workbook.
3. Sign in to the portal again.
4. Do not work in the central summary.
5. Tell the administrator which email and file name appeared.

20.4. Your name is missing from Sales Manager

Do not choose another manager. Send the administrator:

- your full name;
- work Google email;
- corporate email;
- name of the form where your name is missing.

20.5. The request does not appear in Requests

1. Do not submit the form again immediately.
2. Refresh the workbook.
3. Confirm that the correct manager was selected in the form.
4. Wait a few minutes.
5. Send the administrator the time, client, route, and submission confirmation.

20.6. No suitable agent is available

1. Change the transport-type filter.
2. Search by country and nearby hubs.
3. Consider a multimodal option.
4. Register a new verified agent through the form.
5. Never overwrite an existing agent with another company.

20.7. The system says no agent is selected

Return to `Agents` and check the boxes specifically in the `Send` column.

20.8. The agent mailing does not start

Check:

- Request ID row;
- selected agents;
- agent email addresses;
- absence of a previous `Sent Status`;
- corporate mailbox access;
- any Google Apps Script notification.

If no status appears, do not click repeatedly. Record the Request ID and time. The administrator will check `handleCheckboxClick`, Apps Script executions, and the n8n workflow.

20.9. Script authorization failed

1. Allow pop-up windows for Google.
2. Use the correct Google account.
3. Do not create a new trigger yourself unless instructed.
4. Send the administrator a screenshot and the function name.

20.10. The agent cannot find the email

1. Check your `Sent` folder.
2. Verify the agent address.
3. Ask the agent to check Spam/Junk.
4. Check for a bounce message.
5. Do not clear the status or resend without approval.

20.11. `#REF!`, `#N/A`, or another formula error appears

Do not repair the formula manually. Send the administrator:

- file name;
- sheet name;
- cell address;
- screenshot;
- time of occurrence;
- last action performed.

20.12. The client quotation is not sent

Check `Client's Email`, `Price Offer`, and the selected row. If the error remains, do not create a second request. Send the Request ID to the administrator.

21. Daily checklists

21.1. Start of day

- Sign in with the work Google account.
- Open the personal `Quotation`.
- Review new Requests.
- Check agent replies in email.
- Review Pending quotations.
- Check rates nearing the end of validity.
- Check Booked orders waiting for handover.

21.2. Before sending to agents

- Correct Request ID.
- Complete cargo details.
- Confirmed Incoterms.
- Precise route.
- Correct equipment.
- Documents open.
- Relevant agents selected.
- Email addresses checked.
- `Sent Status` is empty.

21.3. Before sending to the client

- Agent rate is valid.
- Approved margin applied.
- Currency and pricing unit shown.
- Inclusions and exclusions are clear.
- Validity stated.
- Client contact checked.
- No data from another client.
- PDF quotation checked after sending.

21.4. Before Booked

- Written confirmation available.
- Price agreed.
- Payment terms agreed.
- Agent confirmed rate and availability.
- BK-number issued.
- Operations Manager assigned.
- Documents handed over.
- Cut-off and key dates recorded.

21.5. End of day

- No unreviewed new Requests.
- Every sent request has a clear status.
- Agent replies are linked to a Request ID.
- Client follow-ups are scheduled.
- Booked shipments are handed to Operations.
- Errors are reported with enough information to investigate.

22. Short logistics glossary

Term	Plain-language meaning
Agent	Partner that provides a rate or performs part of the shipment.
Client	Customer ordering the transport service.
Freight Quote Request	Request for transport cost and conditions.
Quotation	Commercial offer sent to the client.
Request ID	Unique inquiry number.
BK-number	Internal or operational number for a confirmed order or booking.
Incoterms	Rules dividing cost, obligations, and risk between seller and buyer.
FCL	Full Container Load.
LCL	Less than Container Load.
FTL	Full Truck Load.
LTL	Less than Truck Load.
POL	Port/Point of Loading.
POD	Port/Point of Discharge/Delivery.
ETD	Estimated Time of Departure.
ETA	Estimated Time of Arrival.
Transit Time	Expected transport duration.
Validity	Period during which the rate is valid.
Free Time	Period before specified port or container charges begin.
Demurrage	Charge for keeping a container at the terminal beyond free time.
Detention	Charge for keeping a container outside the terminal beyond free time.
DG / ADR	Dangerous goods and the relevant transport requirements.
HS Code	International commodity classification code.
CC	Additional email recipients.
Webhook	Technical address used to pass an event to n8n. Users do not change it.
Trigger	Automatic script start caused by an edit, form submission, or schedule.

23. Current system limitations

The current release is a transitional solution based on Google Workspace and n8n.

Keep in mind that:

- Telegram intake is not yet part of the live workflow;
- automatic reading of selected emails to create clients and agents is not active;
- automated government-registry and sanctions checks do not replace manual review;
- the agent form does not pass the submitter's Google identity to the form owner;
- `✅ Update Request Details` is not a standard user function for repeat updates;
- ordinary agent replies are reviewed manually in email;
- existing records and reference data are changed through a controlled process, not by creating duplicates.

These limitations do not prevent the core workflow of registration, inquiry creation, agent mailing, client quotation, and Operations handover.

24. Quick workflow: one order from start to finish

1. Sign in to `formag.az` with your work Google account.
2. Check whether the client exists in `Client List`.
3. If not, complete `Client Registration Form`.
4. Check for suitable agents in `Quotation -> Agents`.
5. Register a new agent through `Agent Registration Form` when required.
6. Collect complete cargo details from the client.
7. Click `Get Offer` and submit the Freight Quote Request.
8. Open `Quotation -> Requests` and find the Request ID.
9. Select suitable agents with the `Send` checkboxes in `Agents`.
10. Return to `Requests` and tick `✅ Send to Agent` on the Request ID row.
11. Confirm `Sent to Agents` and check the `Sent` folder.
12. Receive agent replies by email.
13. Compare rate, validity, transit time, free time, and additional charges.
14. Open `Sales -> Sales Quotation`.
15. Find the Request ID and complete client contacts, `Price Offer`, and `Remarks`.
16. Complete the commercial check.
17. Tick `✅Sent to Client`.
18. Confirm `Quotation was sent to Client` and review the PDF in the sent email.
19. Obtain the client's written confirmation.
20. Change `Status of Offer` to `Booked`.
21. Enter the BK-number and assign an Operations Manager.
22. Provide Operations with the complete handover package.
23. Continue client communication until the shipment is completed.

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