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**LeanSource™- web based Transportation Procurement Technology**  
Powered by LeanLogistics.

**LeanSource™ Overview:**  
LeanSource™ is a web based transportation procurement technology that was developed by LeanLogistics, Inc. to provide a user friendly transportation bid tool, for both shippers and carriers, to manage the vast amount of data and communication interaction that is required during the bid / award / and execution process. LeanLogistics Inc is the global leader for innovative transportation solutions. We combine technology and services to tailor transportation solutions to the needs of our customers and develop network-based products for the good of the transportation community: shippers, carriers, suppliers -- relevant to every shipment every day.

For additional information regarding LeanLogistics, visit our website:  
[www.leanlogistics.com](http://www.leanlogistics.com)

**LeanSource™ role in the RFP or Bid Process:**

**Full Service Event:** LeanSource™ is providing the technology and data administration services that are necessary for planning, analyzing, and executing the large amounts of data associated with a transportation bid.

**DIY (Do-It-Yourself) Event:** Our clients use LeanSource™ technology, to communicate all of the necessary documents and support information in relationship to a transportation bid.

The shipper retains the following controls and responsibilities for both Full Service and DIY Events:

1. All carrier participation selections  
2. All award / routing decisions  
3. Contract negotiation / relationship will remain between shipper and service provider  
4. Daily operations – load tender execution  
5. Freight Bill Settlement

**Questions:**

All questions regarding the LeanSource procurement process can be directed towards: support@leanlogistics.com

**Technical Requirements**

Supported browsers: Microsoft Internet Explorer version 7 (or higher) or Mozilla Firefox version 3 (or higher)

Regardless of internet browser selection, [Adobe Flash Player version 10 (or higher) is required.](http://get.adobe.com/flashplayer/) For additional information regarding the Adobe Flash Player update, go to:


**Minimum screen resolution is: 1024 x 768**
Quick Reference Guide

1. Complete Registration Process and receive password via email

2. Login to LeanSource™ and complete service provider profile

3. Click on View RFPs and select an RFP

4. Instructions Tab:
   - Review the RFP Details
   - Download/Review the RFP Files

5. Responses Tab
   
   (Same process for both Round 1 and Round 2):
   
   Either
   - Enter rates via the website
   
   Or
   - Download the ‘Response Template’, fill it out and upload the completed file.

   **Important Note:** Always click the ‘Commit Rates’ button to finalize your response before the end of the round.

6. Awards Tab:
   - Review awards
   - Accept, Reject, or Modify
   - Wait for shipper approval

7. Download Rate Schedule and provide an executed copy to the primary RFP contact at the shipper.

The quick reference guide is a basic outline of how to respond to a LeanLogistics procurement event using the LeanSource™ transportation procurement application. This guide is intended for those who are familiar with various transportation procurement applications and respond regularly to these type of events. For a more detailed explanation of how to use the LeanSource™ application, please refer to the pages that follow.
LeanSource™ Procurement Process

1. A shipper chooses the LeanSource™ procurement application to manage their procurement event, aka Request for Proposal (RFP).
2. The RFP is prepared within the application:
   - RFP Details & Documents
   - Lane selection
   - Service Provider selection
3. RFP Invitations are issued to selected participants.
4. Service providers complete the following:
   - Registration
   - Service Provider Profile
5. Service Providers are given the opportunity to:
   - Review the details of the procurement event online
   - Respond to each round of the event between the start and end dates of each bid round.
6. After the bid rounds have closed, the shipper:
   - Performs the RFP analysis using the tools provided within LeanSource™
   - Makes award selections based on the results of their analysis
   - Issues the award to the carriers online within LeanSource™ for final review and acceptance
7. After all awards have been accepted, the Shipper closes the event and the rate schedules are available to the service providers for download.
Invitation / Registration

There are two ways to become registered service provider within the LeanSource™ application:

- Service provider is sent an invitation to complete a carrier profile
- Service provider is sent an invitation to a specific procurement event

If your company has been selected as an invitee, you will receive an invitation via email informing you that you have been invited to register within LeanSource™. This email will provide you with a link to the registration website where you can complete the User Registration process.

To complete the User Registration process:

- Click on the link provided in the invitation and click the **Create a new LeanSource™ account** button

**Step 1: Update Contact Information**

- If the contact information is correct then proceed to the next step
- If the contact information is not correct you can either:
  - correct the contact information and proceed to the next step
  - or forward the invitation email to the correct point of contact so that they may complete the User Registration process

**Step 2: Enter Company Information**

- Enter your company’s Carrier Reference Type (North America: SCAC, EU: VAT)
- Enter your company’s MC Number (If SCAC has been selected as the Carrier Reference Type)
- Enter your company’s US DOT Number (optional)
- Click “Next”

Note: In North America, MC Number & SCAC are being used as validation, In EU, VAT is being used as validation. These items must be entered accurately in order to successfully register. The registration process is monitored by LeanSource™ support who will contact you should your registration attempt be denied for any reason.

**Step 3: Review Information**

- Confirm that the company information displayed is accurate.
- Enter an ‘Account Username’
- Select the appropriate ‘Date Format’ and ‘Number Format’ for your country
- Click ‘Create Account’

Note: Company address shown in this section is based on the Carrier Reference Database. Where applicable, NMFTA SCAC database information is being provided as a point of validation. Changes or corrections to this information would have to be performed by contacting the NMFTA. If you are not associated with the company listed above, please click ‘X’ to cancel the registration process and notify LeanSource™ support at:

**Email:** support@leanlogistics.com (preferred)  **Or call:** 616-796-3220

Congratulations, you have now completed the registration process. A user name and password will be sent to the email address that was provided in Step 1. Once received, please log in to the LeanSource™ application to complete your service provider profile.
Complete Service Provider Profile

Your profile within the LeanSource™ application gives you an opportunity to enter key details about your company which can be made available to LeanLogistics and LeanSource™ clients requesting additional carrier assistance. Here is how it works:

- A shipper chooses LeanSource™ to manage their procurement event
- A profile match is executed against the details of that procurement event in order to identify carriers who may be able to provide additional resources for that shipper
- The shipper then has the opportunity to ‘Accept’ or ‘Reject’ the matches identified for their event based on their needs and the details provided in the carrier profile

Accuracy is the key when completing your profile to allow us to make the best match possible for both the providers and the shippers.

To complete your service provider profile information:

- Complete each of the fields and fill in the information being requested.
- Please note that some of the more detailed sections such as Carrier Locations, Carrier Contacts, Capacity and Service Areas will require you to first click the ‘Add’ button located in the top right corner of each of these sections.
- If you need assistance while completing your profile, please feel free to contact LeanSource™ Support at support@leanlogistics.com

Note: Please be advised that your company needs to be invited to a specific RFP event in order to be able to view that event. An invitation to complete a profile within the LeanSource™ application does not guarantee an invitation to a specific RFP nor does it allow your company access to view all RFPs being conducted at any given time. If you have been made aware of an RFP that is being conducted within LeanSource™ and you did not receive an invitation for that event, you will need to contact that shipper directly to request an invitation. LeanLogistics cannot and will not provide invitations without the support and approval of the shipper.
Responding to a Procurement Event

Once you have completed your profile, you will be ready to view any available RFPs and begin the response process.

Instructions Tab

1. At the top of the screen, click the ‘View RFPs’ button
2. Double-click to select a specific RFP event from the ‘Select RFP’ listing

3. Review the details of the procurement event displayed on the ‘Instructions’ tab (See Image 6.2)

4. If you prefer not to participate in this event based on the details provided, you may click the ‘Decline Participation’ button to decline to participate.

   **Note:** This ‘Decline Participation’ option can be performed at anytime in the RFP process. If you would like to get more details about the RFP before making this decision, then proceed to the next step.

   **Image 6.1**

   **Image 6.2**

1. **RFP Description, Shipper Overview, RFP Instructions:** Provides a description of the event, details about the shipper, and instructions from the shipper on how to complete the bid
2. **Rate Effective Dates and RFP Status:** Displays the expected rate effective and expiration dates for the rates submitted for this RFP, start and end dates for the current round, and status that the RFP is in currently.
3. **Manage User Access:** Allows a user to give visibility to RFP Events to other users within their company. Drag and drop or highlight the user and click ‘Add User’ or ‘Remove User’ to change permissions of an event.
4. **Decline Participation:** Button which allows you to decline participation after reviewing the RFP details
5. **RFP Files:** RFP Files includes documents such as Master Transportation Agreements, Fuel Tables, Accessorial Tables and any other documentation that might pertain to the event. To download a file from this section simply click the ‘Download’ button for each item you would like to download.

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Responses Tab: Round 1 Response

Now that you have reviewed the RFP Details and Documents you can begin preparing your response; to do so, click on the ‘Responses’ tab.

The ‘Responses’ tab contains the lane details pertaining to the event and is where you will be responding to the event. You have a couple of options when it comes to preparing your response:

**Manual Response Entry**

To enter a response directly into the website:

1. Click on a lane to highlight it
2. Click the ‘Add Response’ button at the bottom right corner of the screen
3. Enter your response within the yellow section of the ‘Edit Response’ window that appears and click the ‘Save’ button

To edit a response:

1. Click on a lane you have responded to in order to highlight it
2. Click the ‘Edit Response’ button at the bottom right corner of the screen
3. Edit your response within the yellow section of the ‘Edit Response’ window that appears and click the ‘Save’ button.

To delete a response:

1. Click on a lane you have responded to in order to highlight it
2. Click the ‘Delete Response’ button at the bottom right corner of the screen
3. The response will be removed for that lane

Once all responses have been completed, you can finalize your rates and submit them to the shipper by clicking the ‘Commit Responses’ button located at the bottom left corner of the screen.

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You can also generate an Excel Spreadsheet containing the lanes to prepare a response and upload it into the website.

To download a response template:
1. Click ‘Generate Response Template’ to generate the template.
2. Once generated the button will change to ‘Download Response Template’
3. Click ‘Download Response Template’ to download the template and save it to your desktop.

To complete the response template:
1. Open the file you just saved
2. Complete the ‘Carrier Response’ section where the column headers are highlighted in yellow
3. Save the completed file

To upload the response template:
1. Return to the ‘Responses’ tab
2. Click ‘Upload Response’
3. If your completed template is free of errors, your response will upload immediately.
4. If your completed template contains errors, you will be advised of those errors via the ‘Upload Errors’ window and be required to correct those before completing the upload (See ‘Upload Errors’ section for more details)

Uploaded responses will be in ‘Pending’ status. You can finalize your response by clicking the ‘Commit Rates’ button at the bottom of the page.

Your response will require the following to be completed for each lane:

- **Rate Type**
  - Either RPM or Flat Rate
- **Rate**
  - Rate as it applies to the Rate Type you selected
- **Minimum Charge** (optional)
  - Only if applicable
- **Mode**
  - Either TL or IM
- **Equipment Size**
  - 53, 48, 40
- **Annual Volume Commitment**
  - Specific number of loads to which your company can commit
- **Asset Type**
  - Either Asset or Broker
  - If you will be providing a mixed response, please enter the asset type that will be used primarily.

*Example: 60% brokerage, 40% asset Response would be: Broker*

The remainder of the template is for informational purposes only and should not be edited prior to uploading the response.
Upload Errors

When choosing to upload a response, you may encounter a few errors. Errors will be displayed for you in the 'Upload Results' window and is broken down into two sections.

Errors - Each line in the ‘Errors’ section represents an error.

Details – ‘Suggested Resolution’ to correct the error and its exact location within the ‘Response Template’ to help you make the correction:

- Row and Column location of the error
- Lane ID associated with the error
- Your responses to help you identify the error

To correct these errors, make the appropriate adjustments to the spreadsheet, save it, and upload the file again.

Once you are confident that your rates are correct:

- click the ‘Commit Responses’ button on the ‘Responses’ tab

If you need to make additional changes after committing a response, click the ‘Uncommit Responses’ button.

Please be sure that all responses have been committed before the end of a round. This finalizes your bid and makes it available to the shipper for analysis.

If you need further assistance with this process, please contact LeanLogistics at support@leanlogistics.com
The Response Filters can be used to view a specific portion of the RFP lanes. Below is a list and description of different filters located on the ‘Response’ tab:

- **Round** - Select Round from the dropdown list
- **View** – Select All Lanes, Responded Lanes or Un-Responded Lanes
- **Mode** – Select Truckload or Intermodal
- **Equip** – Select a specific Equipment Type
- **Origin / Destination** - Type information you are looking for
- **Mileage / Volume** – Use slide filter to adjust range

To use a response filter:

- Make your filter selections and the filters will apply automatically

To clear a response filter:

- Click the ‘Reset Filter’ button
Responses Tab:

**Subsequent Round Responses**

(Only applicable on two round RFP events; if the event in which you are participating is a single round, proceed to the next step)

Please use the same process described above to respond to subsequent rounds. Subsequent rounds will display a "Quartile Ranking" as feedback to where your bid fell in relation to the other service providers who bid on the lane in the previous round. The ‘Previous Round Quartile’ column is the first column located under the ‘Responses’ column header. The ‘Previous Round Quartile’ information will only be visible until you edit the rate in a specific lane. The quartile information will be removed after the edit because the edited rate no longer represents the first round response.

Quartile ranking is defined as:

- 1 = Top 25% by number of rates provided
- 2 = 2nd 25% by number of rates provided
- 3 = 3rd 25% by number of rates provided
- 4 = Bottom 25% by number of rates provided

- 1 = most competitive
- 4 = least competitive

Once you have completed your adjustments and are confident that your rates are correct, click the ‘Commit Responses’ button.

If you need to make additional changes after committing a response, click the ‘Uncommit Responses’ button.

Again, please be sure that all responses have been committed before the end of a round. This finalizes your bid and makes it available to the shipper for analysis.

If you need further assistance with this process, please contact LeanLogistics at support@leanlogistics.com

Image 11.1

Congratulations! Once your rates have been committed, you will have successfully submitted your ‘Round 2 Response’. Once all of the bids have been received there will be a period of analysis which will vary based on the size of the procurement event. Once the bid analysis has been completed and service providers have been selected for awards, you will receive an award notification via email letting you know that you may proceed to the next step.
Manage Change Requests

Change requests allow carriers to make changes to their previous round bids in the event that a rate was entered incorrectly, left out by mistake, or a rate simply needs to change due to other circumstances within your network.

Note: Change requests must be approved by the shipper in order to update your response for the applicable round because they occur outside of the normal bidding process.

To create a change request:

- Click on ‘Manage Change Requests’ at the bottom of the ‘Responses’ tab.
- Click ‘Add Request’ and then select the ‘pending’ request and hit the edit request button to select the lane(s) for which you would like to change your response.

There are two options for submitting a change request:

To manually add a change:

- Click ‘Add Change’ and either
- Click ‘Add Response’ to add a rate to a lane not previously bid.
- Click ‘Edit Response’ to edit the rate of a lane you previously bid.
- Click ‘Delete Response’ to delete a rate from a lane you previously bid.
- Click ‘Submit Request’ when you have completed adding all changes to your ‘Change Request’ to notify the shipper.

To upload a change request:

- Make the changes to your ‘Rate Response Template’ and save the file.
- Click ‘Upload Changes’
- Click ‘Submit Request’ when you have completed adding all changes to your ‘Change Request’ to notify the shipper.
Award Tab

After you receive your Award Notification, please return to the website and click on the ‘Award’ tab. The ‘Award’ tab is where all of your award information will be displayed. This process is designed to allow service providers the opportunity to review their awards prior to downloading an executable rate schedule.

Awards are assigned both a Status and a Type:

Award Statuses consist of:

- **Pending** – Awaiting response.
- **Shipper Modified** – Shipper modified the carrier rate and/or commitment and is awaiting carrier acceptance.
- **Carrier Modified** – Carrier modified the rate and/or commitment and is awaiting shipper acceptance.
- **Accepted** – Carrier accepted the award.
- **Rejected** – Carrier rejected the award.
- **Shipper Withdrawn** – Shipper has withdrawn the award.

Award Types consist of:

- **Primary** – Shipper has awarded a specific amount of freight to the carrier and/or the carrier holds a primary position on the routing guide.
- **Backup** – Shipper has selected the carrier for a position on the routing guide but has not awarded the carrier a specific amount of freight.
- **On-File** – Shipper has selected the carrier rates to be loaded within their TMS or kept on file for potential future opportunities.

Each lane award will require that one of the following actions be performed:

- **Accept** - accept awards
- **Reject** - reject awards with a reason as to why the award is being rejected
- **Modify** - make any final modifications to rate or volume

Image 13.1

Primary and Backup Awards are displayed on the screen and can be responded to either individually or as a whole.

On File Awards can be managed by clicking the ‘Manage On File Awards’ button.
There are two methods by which you may accept awards:

**Manual Award Response**

To accept an award:

- Highlight the award(s) you want to accept (multiple can be selected by holding down the ‘Shift’ or ‘Ctrl’ key) and hit the ‘Accept’ button

To reject an award:

- Highlight the award(s) you want to reject (multiple can be selected by holding down the ‘Shift’ or ‘Ctrl’ key) and hit the ‘Reject’ button

To modify an award:

- Highlight the award you want to modify and hit the ‘Edit’ button
- Use the ‘Carrier Modifications’ section of the ‘Modify Carrier Award’ window to make modifications
- **Important:** Once modifications are made, they will need to be accepted by the shipper before they are considered valid.

Once all of the award selections have been finalized and accepted, the ‘Schedule A Report’ button will appear. Download the ‘Schedule A Report’ and return an executed copy to the shipper via the RFP instructions.

It is possible that during the award negotiations, the shipper may award additional lanes and volumes to your company. Should this happen, return to the awards tab, respond to the additional awarded lanes, download an updated copy of the ‘Schedule A Report’ and return an executed copy to the shipper.

Remember that ‘Carrier Modified’ rates will not be available on the ‘Schedule A Report’ unless they are approved by the shipper.

Image 14.1

On File awards must be either accepted or rejected as a group. If any rates need to be removed before accepting the on file rates, please contact the shipper so that they can withdraw any specific On File awards.

To accept On File awards, click the ‘Accept On File Awards’ button.

To reject On File awards, click the ‘Reject On File Awards’ button.

Image 14.2
You can also generate an Excel Spreadsheet containing the awards, prepare your award response, and upload the spreadsheet back into the website once finalized.

To download an award response template:
1. Click ‘Generate Award Template’ to generate the template.
2. Once generated the button will change to ‘Download Award Template’
3. Click ‘Download Award Template’ to download the template and save it to your desktop.

To complete the award response template:
1. Open the file you just saved
2. Complete the ‘Award’ section of the ‘Award Template’ tab where the column headers are highlighted in yellow
   a. Choose the appropriate action from the ‘Action’ Column
   b. If ‘Editing Carrier Award’ enter the updated Rate Type, Rate, Minimum Charge, Currency, and Alloc (carrier commitment) under the Carrier header
3. Complete the ‘Award’ section of the ‘On File Award Template’ tab by selecting either ‘Accept Shipper Award’ or ‘Reject Shipper Award’
4. Save the completed file

To upload the award response template:
1. Return to the ‘Awards’ tab
2. Click ‘Upload Award’

Once your awards have been successfully accepted you will be able to generate a PDF copy of the rate ‘Schedule A’ to sign and send back to the shipper. An excel copy of the ‘Schedule A’ will also be available via the website so that you may use this data to process any of the submitted rates within your own systems.

Congratulations! Once you have submitted all signed documentation, you will have completed the RFP process.
User Settings

You may edit your user settings at anytime by clicking the ‘User Settings’ button in the top right corner of the screen. The user settings will allow you to edit your ‘Contact Information’ and ‘International Settings’ as well as allow you to change your password.

To edit, simply change the information in the boxes provided and click the ‘Save’ button to update your settings.

Manage Users

The ‘Manage Users’ section allows the current carrier user to add additional users within their company to the LeanSource application.

You can add, edit or delete a user using one of the following methods:

If the user is not listed as a contact:

- Click the ‘Create User’ button, enter the required information and the username and password will be emailed to the user you created upon hitting the ‘Save’ button

If the user is already listed as a contact:

- Highlight the user by clicking on the row
- Click the ‘Create User from Contact’ button, enter a username for the new user and the username and password will be emailed to the user you created upon hitting the ‘Save’ button

To edit user information:

- Highlight the user by clicking on the row, click the ‘Edit User’ button and make the necessary adjustments (similar to user settings) and click the ‘Save’ button

To delete user information:

- Highlight the user by clicking on the row and click the ‘Delete User’ button
Troubleshooting
If you are experiencing trouble with the LeanSource application, please check the following items prior to contacting LeanSource support:

1. Verify that you are using Microsoft Internet Explorer version 7 (or higher) or Mozilla Firefox version 3 (or higher)
2. Confirm the resolution for your computer monitor is set at 1024 x 768 or higher
3. Confirm that Adobe Flash Player 10 or higher is installed on your computer. To get the latest version go to http://get.adobe.com/flashplayer/
4. Ask your IT department to make sure that http://www.leansourcerfp.com/ is not being blocked by your company’s internet security system or firewall

FAQ
Below is a list of frequently asked questions:

Registration Assistance

My registration attempt failed.
- Verify that your NMFTA SCAC subscription is up to date and confirm the MC number you are entering is the same MC Number on file with the NMFTA
- Verify that the shipper who has invited your company has used the proper NMFTA registered SCAC

I do not see a ‘Next’ button at the bottom of my registration page.
- Check your monitor resolution and verify that it is set at 1024 x 768 or higher

When I click on the registration link, nothing happens.
- Confirm that Adobe Flash Player 10 or higher is installed on your computer. To get the latest version go to http://get.adobe.com/flashplayer/
- Ask your IT department to make sure that http://www.leansourcerfp.com/ is not being blocked by your company’s internet security system or firewall

Login Assistance

I’ve logged in, but do not see the RFP that I was invited to.
- Scroll through all of the RFPs on the list, the RFPs are listed in order by creation date, so if the RFP you are looking for was created before the last RFP you were invited to, it is possible that the RFP is a little further down the list than expected.
- If your company has multiple SCACs, verify that the shipper who has invited your company has used the same SCAC that your username is registered under.