

# When Creating Notes Within a Salesforce Opportunity Record:

At minimum, please provide the following to ensure that our top tier brokers have the initial information they will need before contacting an exporter. Since the notes section is visible to Silver, Gold, and Platinum brokers through an online portal, please consider using full sentences and refrain from using acronyms.

1. First year company exported under its current name
2. Invoice terms exporter is currently using
3. Reason exporter is seeking ECI with EXIM
4. The company has an active DUNS# and that the name/address in D&B, matches their current operating information, and EXIM Salesforce record
5. The exporter has an assigned UEI ID and active [SAM.gov](https://sam.gov) registration, or has been put in touch with the EXIM UEI team to obtain one on (enter date)
6. Total number of worldwide employees
7. The products being exported and confirmation they are U.S.A.-made
8. Annual company sales volume, and how much of it is export sales only (\$)
9. Average international shipment size (\$)
10. Whether the exporter has or has had EXIM or non-EXIM credit insurance  
*(If yes, indicate if the exporter would like to work with their broker, and their name)*



**REMINDER:** When saving the opportunity record, make sure to select the "referred to broker" stage to earn credit.

## Ideal opportunity note:

### Notes

Mike Johnson/owner said that they have some opportunities in the Middle East (~\$50K/each) and Latin America (~\$200K/each) to extend net 60 terms and would like the EXIM protection for risk reasons (roughly \$5m/year sales, 40% export). No prior invoice insurance; no broker contact. Has been advised of the steps to get started on UEI and put in touch with EXIM UEI team on 6/10. Their D&B matches what we have for them in Salesforce (name/address). Co has been exporting since 1998 (>Syr on credit) and has 10 full-time staff. They use a contract manufacturer in AR for the items that they export (USA made). This is a family business. They know a broker is going to reach out to them to apply at EXIM soon.

### Broker Referral Notes Guide

<https://grow.exim.gov/hubfs/resources/EXIM-salesforce-opportunity.pdf>

### Designated Contact

Myron (Mike) Johnson