



ABSTRACT

Thank you for taking the time to check this out! This document is an example of a process I documented and standardized while working for a previous employer. Any sensitive or proprietary information has been redacted for confidentiality. I created this document to ensure the process was documented before my departure. This (hopefully) showcases my ability to take detailed notes, organize information, and develop standardized procedures.

PORTFOLIO DOCUMENTATION PROJECT

By William Fisher

Container Document Forwarding Process

Purpose

This document serves as a guide for forwarding the necessary imported container documents to [REDACTED] HQ.

Please Note: This document does not cover the receiving process for imported containers. Please see [REDACTED] receiving SOP document for more information.

Guide

First, begin by searching the container# or PO# in Netsuite.

Upon arriving at the PO page in Netsuite, scroll down and click on Communication > Files. This will list several PDFs and/or Excel files named various things. The target file is the commercial invoice and packing list. Sometimes these files can be hard to find, but they are almost always present in one of the files listed. If for some reason you cannot find them, email the buyer listed on Netsuite for help.

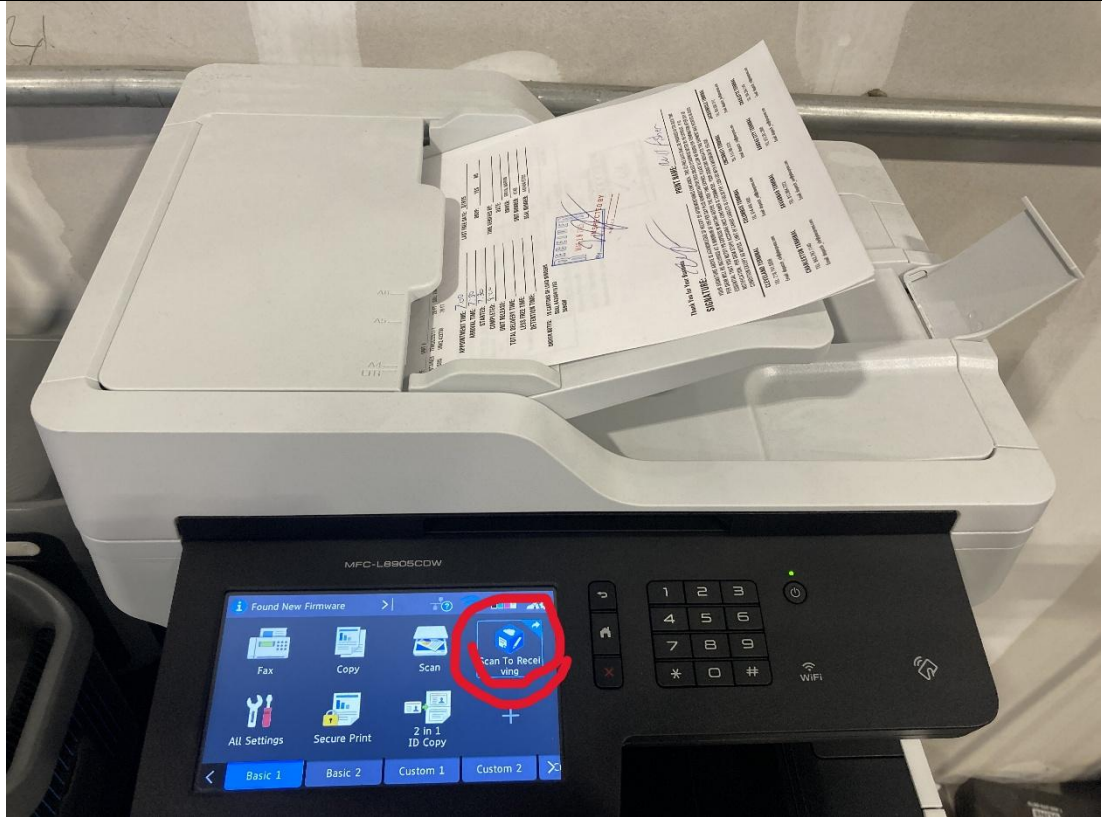
Once the correct files have been found, print them out.

The screenshot shows the Oracle NetSuite interface. At the top, there's a search bar and navigation tabs. The 'Communication' tab is selected, and the 'Files' sub-tab is active. Below this, there's a table of attached files. The first file, 'Commercial invoice and packing list for USCC250118 (440173).pdf', is highlighted in yellow. Other files include 'PI PO#440173 2024.11.6.pdf', 'Qinde shipping documents for USCC250118.pdf', 'SS24197812 440173 BP.pdf', and 'TEST REPORT FOR USCC250118.pdf'. The table columns are: ATTACHED FILES #, FOLDER, SIZE (KB), LAST MODIFIED, DOCUMENT TYPE, REMOVE, EDIT, and DOWNLOAD.

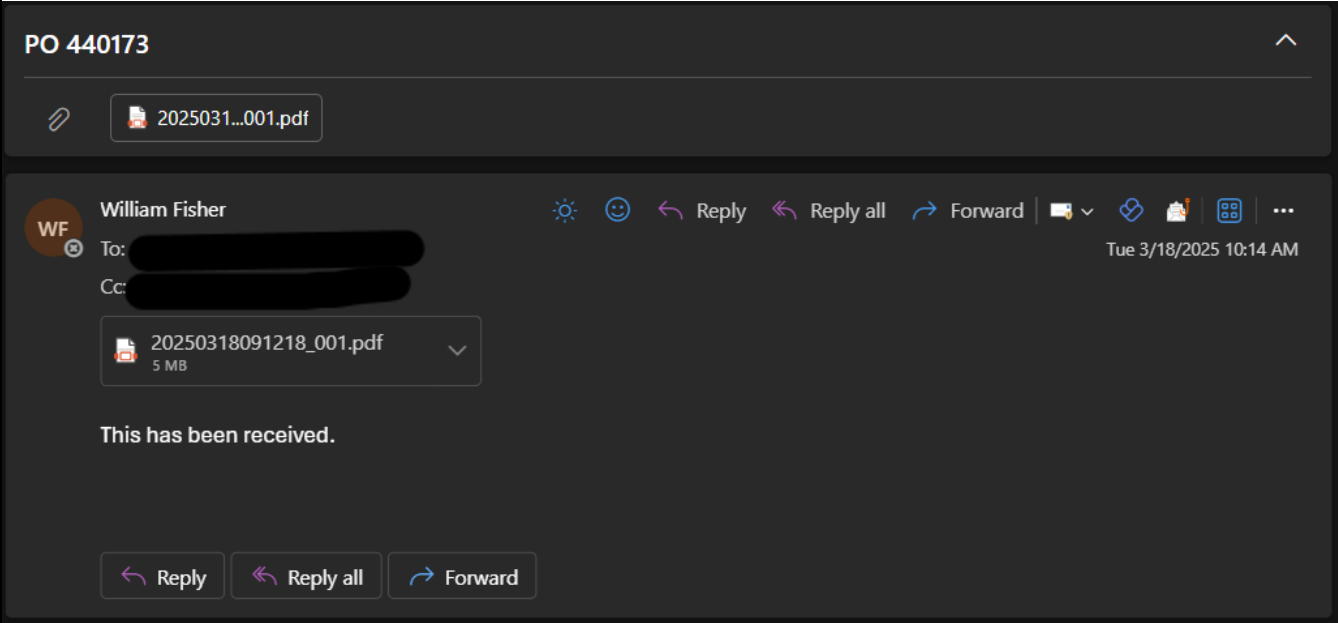
ATTACHED FILES #	FOLDER	SIZE (KB)	LAST MODIFIED	DOCUMENT TYPE	REMOVE	EDIT	DOWNLOAD
Commercial invoice and packing list for USCC250118 (440173).pdf	Import Paperwork	141	1/27/2025 8:39 am	PDF File	Remove	Edit	download
PI PO#440173 2024.11.6.pdf	Import Paperwork	38	11/7/2024 5:24 pm	PDF File	Remove	Edit	download
Qinde shipping documents for USCC250118.pdf	Import Paperwork	568	2/12/2025 6:47 am	PDF File	Remove	Edit	download
SS24197812 440173 BP.pdf	Import Paperwork	1,952	3/7/2025 2:46 pm	PDF File	Remove	Edit	download
TEST REPORT FOR USCC250118.pdf	Import Paperwork	188	1/27/2025 8:39 am	PDF File	Remove	Edit	download

To reiterate, the files required to download and print are "Commercial Invoice" and "Packing List" all other files and documents can be ignored.


Once the documents have been printed, stamp the delivery receipt (aka the paper that is given by the truck driver) with the received and inspected stamp. Then scan the documents to the receiving email. This is done by pressing the "Scan to Receiving" button on the printer after the documents have been placed in the scan feeder.



Once the email containing the scanned documents has been received. Email them to with the PO# in the subject line as shown in the example below.



Congratulations! This process is now complete.

	Container Document Forwarding Process	Version 1
	By: William Fisher	3/18/2025

Revision History

Version	Date	Description of change
1.0	3/18/2025	Initial Creation