PORTFOLIO DOCUMENTATION PROJECT

By William Fisher

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.

Container Document Forwarding Process

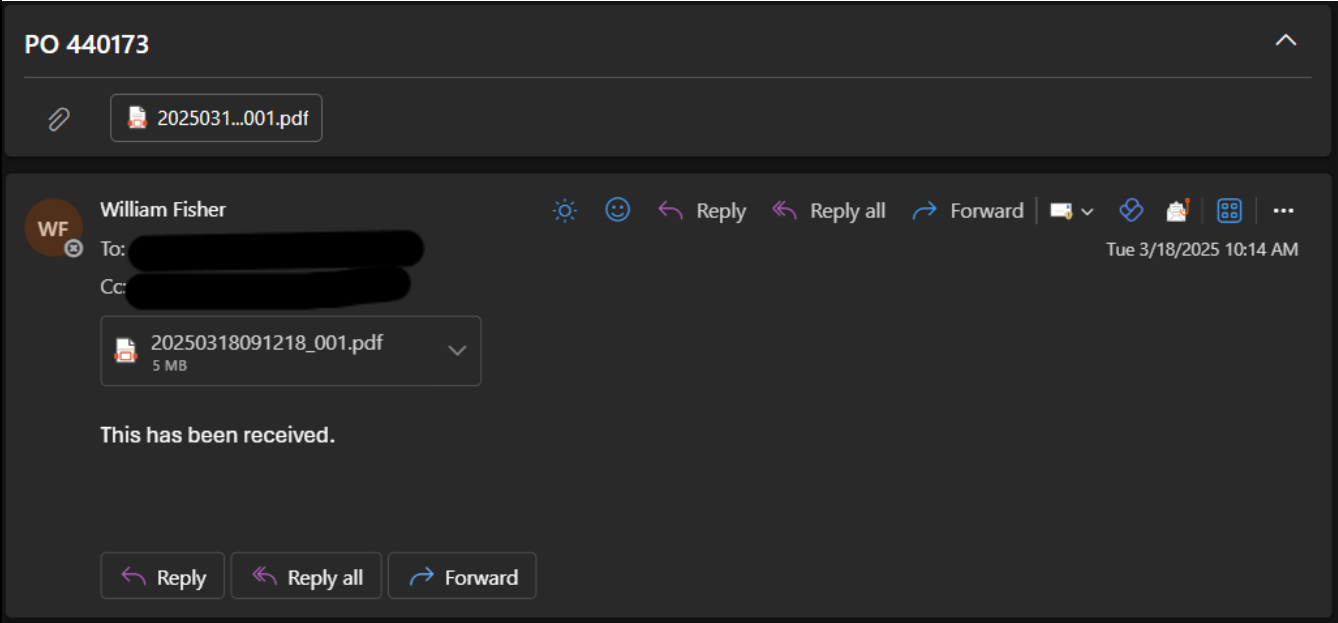| **Purpose** |
|---|
| This document serves as a guide for forwarding the necessary imported container documents to ▮▮▮▮ HQ.

Please Note: This document does not cover the receiving process for imported containers. Please see ▮▮▮▮ **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. |

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 screceiving email. This is done by pressing the "Scan to Receiving" button on the printer after the documents have been placed in the scan feeder.
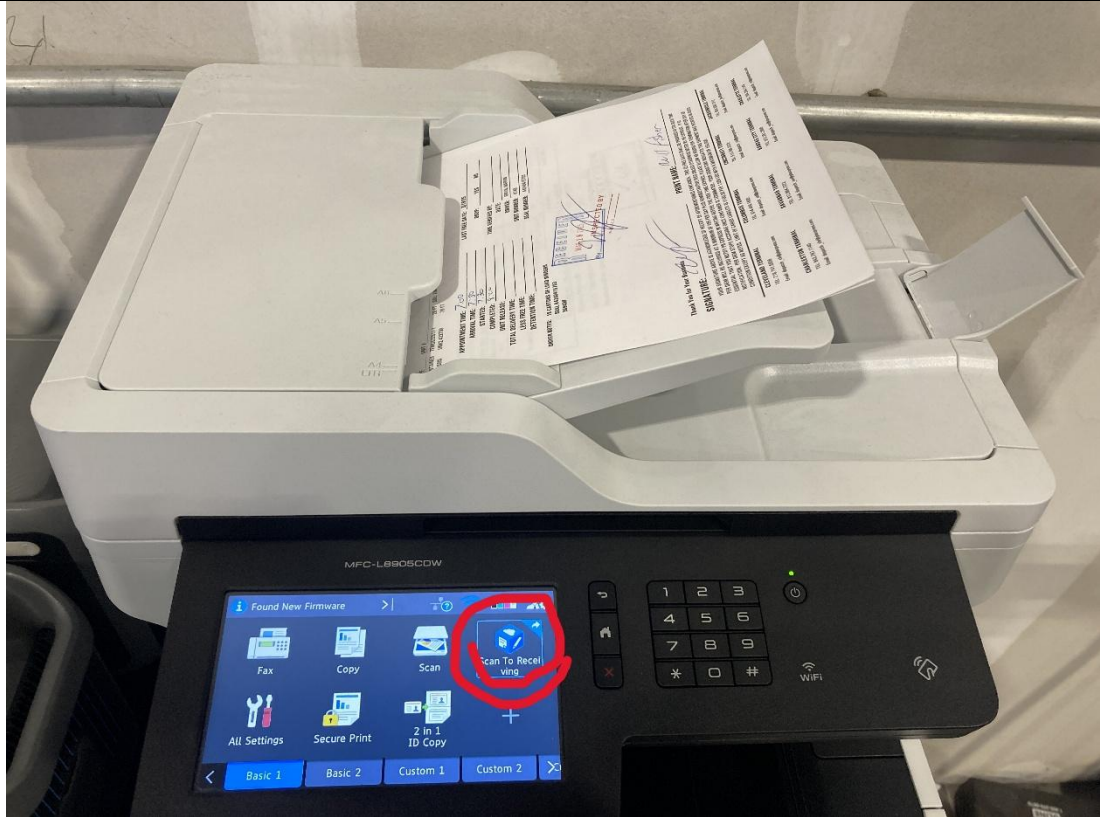
Once the email containing the scanned documents has been received. Email them to ████████████████████████ with the PO# in the subject line as shown in the example below.

PO 440173

📎   📄 2025031...001.pdf

WF   **William Fisher**
  To: ████████
  Cc: ████████

☀ ☺ ← Reply ← Reply all → Forward ▾ ...
Tue 3/18/2025 10:14 AM

📄 **20250318091218_001.pdf**
5 MB   ⌄

This has been received.

← Reply   ← Reply all   → Forward

Congratulations! This process is now complete.

Revision History

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