

Online Data Entry - V1 3.7.23

Business Problem

The Business is doing an online data entry of the LTL/BOL's in the Freight Optics Application but the manual process is quite tedious and has the following concerns

- Data Accuracy
- Data Duplication
- Incomplete/ Missing Information
- Training and Familiarity with the Application
- Data validation and Error Handling
- Meet the Business SLA- ZD Team will have 3 days SLA(Service Level Agreement) in that 3 days we need to complete Data Entry in a day and half from the received date and a day and half to do QA i.e., Final checkpoint.

High-Level Process

We have two business partners, Freight Optics and Audintel. These two business Partners have multiple clients.

1. Under Freight Optics, we have 12 clients. They are,

- Chapin International
- Avanti
- Techlight
- Redhawk
- United Scope
- Environmental Lights (Files need to be loaded from Junk folder as well)
- Thermon (PO# must for all the carriers, CH Robinson-BOL needed) (FedEx-Capture Class from Invoice copy)
- Globe Scientific
- 1Concier
- Global Logistics
- FloorFound
- Legacy Consumer Companie (The Rewind Company does not require a BOL copy to process).
- RJTB Group (NKIN=No need of bol as backup docs can be considered as BOL. - PO numbers are four digits and sales order numbers are five digits given under ORDER NUMBERS / OWNER'S REFERENCE on the pdf. BOL number cannot be NA).

2. Under ICC Logistics, we have one client.

- Fairfield

3. For Audintel, we have six clients. They are

- Anixter
- Accu-Tech
- Leslie's Pool
- Anixter Canada
- Future Electronic
- After Market.

Steps

Step-1: Go to Freight Optics and click on Freight and Invoice Entry and click on upload

The screenshot shows the Freight Optics web application interface. The top navigation bar includes 'Admin', 'Parcel', 'Freight', and 'Suryateja'. The 'Freight' menu is open, showing options like 'Reports', 'Dashboards', 'Invoice Search', 'Client', 'Carrier', 'Client Carrier', 'Invoice Entry' (highlighted with a red box), 'Location', 'Services', 'Accessorial', 'Agreement', and 'International Tariff'. The main content area has tabs for 'Upload', 'Data Entry Queue', 'Data Entry', 'Upload ON TIME Report', 'ODE Segregation', 'ABBYY Files Download', and 'Invoice Entry'. The 'Upload' tab is active, showing a form with fields for 'Client*', 'Carrier*', 'Mode*', 'Expected Invoice', 'Received Date*', 'Is Excel Template?', and a 'File' upload section. The 'Client*' field is set to 'Select a client in...', 'Carrier*' is 'Select a carrier...', 'Mode*' is 'Choos...', and 'Expected Invoice' is '1'. The 'Received Date*' field is empty. The 'File' section has a 'Choose Files' button and 'No file chosen' text.

Client- ?

Carrier- ?

Mode- If below 30,000, It is LTL, or else it will be mentioned on the PDF

Expected Invoice = 1

Received Date= Today's Date

Upload the PDF that you want to enter and upload it

Step 2- Go to Data Entry Queue

check the one that you have recently uploaded and click on Enter Data button.

DATA ENTRY								
#	Client	Carrier	Mode	Exp No.	Received Date	File Name	Assigned Person	Actions
1	Demo Client FftOpt	C&M Forwarding co Inc	FTL	17	10/15/2021	FDXF_CMFC_FTL_32544_CHPN_CMFC_LTL_64818_C&M FORWARDING-20821397-17.pdf	jwindham	Enter Data Data Entry Completed Delete
2	Legacy Companies ConsumerGroup	Echo Global Logistics Inc	FTL	1	06/27/2023	LCCG_ECHS_FTL_56803_53404228-1.pdf		Enter Data Data Entry Completed Delete
3	1Concier	R & L CarriersInc	LTL	1	06/27/2023	CONC_RNLO_LTL_77871_CONC_RNLO_LTL_30845_R094341_20230626004625962_1-66-68.pdf		Enter Data Data Entry Completed Delete

Step 3-

Invoice Number = Freight Bill Number

BOL Number- BOI Number

PO Number=

Service Number=

Package Description =

Net Amount Due-

Mode-

Bill Option- Payment Terms

997155884		Service: STANDARD SERVICE	
Payment Terms <input checked="" type="checkbox"/> Prepaid <input type="checkbox"/> Collect <input type="checkbox"/> 3rd Party			
Shipper NFI SAVANNAH Shipping 1240 SH MORGAN PKWY POOLER, GA, 31322, US 9106767201 Pickup On -05/11/2023 between 12:00 pm - 03:00 pm		Consignee WAVE RESORT LUIS RODRIGUEZ 110 OCEAN AVE N LONG BRANCH, NJ, 07740, US 3058058085	
Order Number : WSHIP-10000085537		P.O. Number : LUIS POOL TOWELS 5.10.23	
Pickup Instructions		Delivery Instructions	

Total Pieces- Quantity

SO Number- Blank

Invoice Date- Date

Total Weight - Weight

Note: Except Received date, all the other fields will be available in the invoice. Received date is nothing but the day which we enter the invoice (Ex: I am entering the invoice today. I will enter the received date as today's date).

Pickup Date- This is tracked from the Carriers Page here in this case [Add Shipment Tracing](#) copy paste the tracking number and get the time stamp

rlcarriers.com/freight/shipping/shipment-tracing
Authentication Keka Gmail Freight Invoice Scre... Authentication Authentication Freight Invoice Scre...

Home > Shipping Tools > Shipment Tracing

Ship in 1-2-3 Tools

- Rate Quote**
For U.S., Canadian, or Offshore freight.
- Bill of Lading**
Prepare freight to be picked up by R+L.
- Pickup Request**
Arrange a time for R+L to pick up freight.

*** Other Tools**
Calculate transit times, view maps, etc.

Shipment Tracing

All fields and sections are required unless they are noted as optional.

Enter up to 25 numbers, 1 per line

Type:

Tracking Numbers:

997153884

Track a Shipment

Use this tool for tracing all of your freight shipments. Enter your PRO number to track your shipment. You can enter as many as 25 numbers for multiple shipment tracing. Sign in with your MyRLC login to track shipments by several different reference numbers as well as view more detailed shipment information. Sign up for a [MyRLC account](#) here. You can also use the Activity Queue to reference previously tracked shipments.

Delivery Date-

rlcarriers.com/freight/shipping/shipment-tracing?source=web
Authentication Keka Gmail Freight Invoice Scre... Authentication Authentication Freight Invoice Scre...

Pickup Request

3 Arrange a time for R+L to pick up freight.

*** Other Tools**
Calculate transit times, view maps, etc.

Trace Another Shipment?

WAVE RESORT JN JOE FUENTE
110 OCEAN AVE N
LONG BRANCH
NJ
07740

N F I INDUSTRIES
1240 S H MORG N
PARKWAY
POOLER
GA
31322

pickup date

Date	Time	Status
05/11/2023	05:36:45 PM	Picked Up in POOLER, GA
05/11/2023	10:28:18 PM	Departed YEMASSEE, SC in route to CHINA GROVE, NC
05/12/2023	03:54:09 AM	Arrived at CHINA GROVE, NC
05/12/2023	07:24:00 AM	Departed CHINA GROVE, NC in route to destination terminal
05/12/2023	05:26:46 PM	Arrived at destination terminal
05/17/2023	02:16:00 PM	Delivered

Delivery

Wight unit code- lbs (Always)

Bill to Address-

Shipper Address-

Consignee Address

Step 4- Add all the lines with their charge codes that has Weight, Rate, and Amount

SHIPPER		CONSIGNEE		BILL OF LADING NO.	
I F I INDUSTRIES		WAVE RESORT JN JOE FUENT WOOD		SHIP-10000085537	
1240 S H MORGAN PARKWAY		110 OCEAN AVE N		Terms of Shipment	
POOLER, GA 31322		LONG BRANCH, NJ 07740		PREPAID	

Pieces	Description of Articles	Tariff	RLC5025	Weight	Rate	Amount
0	QUOTE NUMBER: 18084550					
2	TEXTILES 20 CASES		C70	701	304.13	2131.95
	--> R&L'S DISCOUNT SAVES YOU ---->				.91	1940.07-
1	FUEL SURCHARGE					44.71
1	INSIDE DELIVERY CHARGE				80.00	80.00
1	LIFTGATE CHARGE				26.50	26.50

P O # LOUIS POOL TOWELS 5.10.23
 SHIPPER# WSHIP-10000085537
 BOL# SHP6127235
 ORDER NUMBER# WSHIP-10000085537
 PICKUP # 71616950
 CUST EMAIL: LMRDRIGUEZ@WAVERESORT.COM
 CUST EMAIL: LMRDRIGUEZ@WAVERESORT.COM
 CUSTOMER PHONE # 3058058085
 SHP EM: LCONCIERCS@NFIINDUSTRIES.COM
 *** LIFT GATE REQUIRED ***
 MUST BE DELV ON STRAIGHT TRUCK
 SHIPPERS PHONE # 9106767201
 WEB PRO# 997153884
 TMRDRIGUEZ@WAVERESORT.COM

Multi-Stop Information: We will use the Multi Stops button when we have multiple Shipper and Consignee's

MULTI-STOP INFORMATION

Multi-Stops

MULTI-STOP #1:
Stop Sequence #: 1

Weight: 35,494.00 Units shipped: 6

Description: PPLIES WRAPPED PALLE Name: MING POOL SUPPLIES #8 Address: 2184 GRASS VALLEY HWY City: AUBURN US

Postel code: 95603 Reference: C003867

MULTI-STOP #2:
Stop Sequence #: 2

Weight: 35,494.00 Units shipped: 11

Description: PPLIES WRAPPED PALLE Name: MING POOL SUPPLIES #3 Address: 7717 LAGUNA BLVD X City: ELK GROVE US

Postel code: 95758 Reference: C003867

Step 5- Add Invoice

Step 6- Click on Data Entry Complete

#	Client	Carrier	Mode	Exp No.	Received Date	File Name	Assigned Person	Actions
1	Demo Client FrtOpt	C&M Forwarding co Inc	FTL	17	10/15/2021	FDXF_CMFC_FTL_32544_CHPN_CMFC_LTL_64818_C&M FORWARDING-20821397-17.pdf	jwindham	Enter Data Data Entry Complete
2	Legacy Companies ConsumerGroup	Echo Global Logistics Inc	FTL	1	06/27/2023	LCCG_ECHS_FTL_56803_53404228-1.pdf		Enter Data Data Entry Complete
3	lConcier	R & L CarriersInc	LTL	1	06/27/2023	CONC_RNLO_LTL_77871_CONC_RNLO_LTL_30845_R094341_20230626004625962_1-66-68.pdf	suryateja	Enter Data Data Entry Complete

Once we click on Data Entry Complete, then we are done with Data Entry. By clicking on Data Entry Complete, that file will disappear from the list and it will automatically move to QA list.

Scenario -1: Multiple invoices

After entering the Invoice, we will click on Add Invoice tab. On the same page, we can fill in all the fields then we will click on Add Invoice tab like this we can add multiple invoices in the same file.

Guideline: If we have multiple invoices in the same file while uploading a file, we should mention them in the expected invoices tab (Ex: In my file, there are 7 invoices, so expected invoices should be 7).

Scenario-2: Ocean Invoices

When we select Mode as either Ocean FCL or Ocean LCL while uploading a file. These fields will be in addition.

Move Type-

- **Container Information**

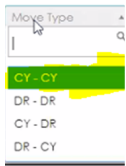
- Unit: count of the containers(ex:1)
- Container number: Consider the Container number
- Size: It is available in the Container number (ex: 40HQ).
- Choose type: Consider DC (Dry Container).

Click on Add Container tab In Container Information. Add more than one container.

- **Ocean Locations:** In the ocean locations field click on Add Location tab to add the locations.

We need to locate one is the origin and another one is for the destination. Ocean location details are completely based on Move type. Here we have two scenarios.

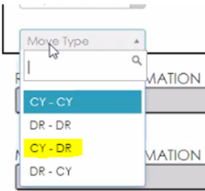
Step - 1: If we choose the move type as CY/CY



Then we need to select both origin and destination as ports

A screenshot of the 'Ocean Locations' form. It contains two rows of dropdown menus. The first row is for 'Origin Port' with 'CN' selected, and 'Select State' with 'Ning Bo' selected. The second row is for 'Destination Port' with 'US' selected, and 'NY' selected, with 'BATAVIA' also visible. There are red error icons next to the 'Ning Bo' and 'BATAVIA' selections. A blue button labeled '# All Locations' is at the bottom left.

Step - 2: If we choose the move type as CY/DR



Then we need to select Origin as Port and Destination as Door.

A screenshot of the 'Ocean Locations' form. It contains two rows of dropdown menus. The first row is for 'Origin Port' with 'CN' selected, and 'Select State' with 'Ning Bo' selected. The second row is for 'Destination Door' with 'US' selected, and 'NY' selected, with 'BATAVIA' also visible. There are red error icons next to the 'Ning Bo' and 'BATAVIA' selections. A blue button labeled '# All Locations' is at the bottom left.

All this Move type and Ocean locations information will be available in the invoice.

User personas

Saxon	Jason	Puja
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Next steps

- ☐ Access to Freight Optics Application
- ☐ Mapping sheet for the carrier and its website list
- ☐ Mapping between Clients and Carriers
- ☐ Other samples and steps to do the process

Other documents



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