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| **Doc #: FFR01** | REV. 2 | **Owner:** mark lipinski |
| **REFERENCE:**  *FFR02 – Instructions for Ocean Shipments*  *FFR04 – Tracing of Product*  *FFR05 – Filling-out and Handling the Job Folder*  *FFR06 – Handling Letter of Credit*  *FFR07 – Instructions of Air Shipments* | | **Reviewers:**  Rachna Goraya |
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| **Effective Date:** Sept 21, 2018 | | **Total Pages**: 3 |
| **KEYWORDS:** Courtneypark, Freight Forwarding | | |

TITLE: order processing

# purpose

To define how an order is processed (air, ground, ocean).

# 2.0 SCOPE

All International orders that involve ocean, air, road or rail.

# 3.0 equipment

N/A

# 4.0 definitions

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| **Definition** | **Explanation** |

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| **SSL** | Abbreviation for Steamship Line |
| **CW** | Cargowise – Freight forwarding TMS software |

# 5.0 Responsibility

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| **Responsibility** | **Activity** |
| **Freight Forwarding Team** | It is the responsibility of the freight forwarding team to ensure that international orders are processed, executed, traced and billed correctly.  Team is also responsible for maintaining customer accounts and providing customer service.  Team is responsible for ensuring that they select the best and most appropriate vendors based on mode and routing. |
| **Freight Forwarding Manager** | It is the responsibility of the freight forwarding manager to ensure that the freight forwarding team follows process in accordance with documented procedures and provide support to team where required.  It is the responsibility of the freight forwarding manager to solicit new business and on-board new accounts as required. |

# procedure

## process order

* + 1. The Operations Manager, Supervisor, Or Operations Co-Ordinator Does the Following:
       1. Orders may come in via phone call, fax, email. Opens job file number in the computer and completes the record in CW, refer to Filling Out and Handling of the Job Folder, FFR-05 for all customer orders.
          1. If air shipment, also refer to Instructions for Air shipments, FFR07.
          2. If ocean shipment, also refer to Instructions for Ocean Shipments, FFR02
       2. Checks or compares customer history if order is a repeat or routine.
          1. If a repeat order, may copy the previous order and use it as a template.
       3. Checks with customer for requirements for pick-up or delivery.
       4. Documents verbal orders or changes on the Job Folder refer to Filling Out and Handling the Job Folder, FFR05.
          1. Emails order confirmation to customer as required. If printed, file copy in Job folder. Carrier’s replies to acknowledge receipt.
       5. Enters all costs into Cargowise from the Job Folder for air and ocean unless there is a tariff with the Steamship Line. For trucking, enters carrier cost in Cargowise and prints the Confirmation and maintains it in the job folder.
       6. Prints draft invoice when required.
       7. Follows up with order to ensure proper delivery. If OK, job folder is closed in CW
    2. The Finance Dept. Or Designate Does the Following:
       1. Reviews the Job Folder and compiles documentation.
       2. Prepares invoice. Compares job folder (contains costing or sell rates) to details entered in Freight system.
       3. Prepares Draft invoice when required.
       4. If OK, post invoice. Records invoice number on Job folder.
       5. If OK, prints 1 copy of the invoice.

The copy is either mailed or emailed to customer for payment based on customer requirements. Includes one of with the invoice as applicable: commercial invoice, bill of lading, air waybill, house bill of lading, or e-mail that best describes the shipment and provides the customer with traceability to an order.

* + - 1. Files the Job Folder when complete. If job requires follow up confirmations, forwards job folder to Operations Co-ordinator. E.g. To obtain final POD from carriers.

## changing an order

* + 1. The Operations Co-Ordinator does the following:
       1. Change the system and notify whoever needs to know such as but not limited to: Shipper, agent, carrier, consignee, air line/ steamship line.
       2. If trucking, may also revise skid quantities and weights and re-print and fax the revised Confirmation to the trucking company.
       3. If air / ocean shipment, faxes alternate Booking confirmation / Pre-Advise notice to the Airline / Ocean line.
       4. Writes changes and indicate contact name requesting the change on the Job folder for air and ocean, on Confirmation for trucking.

# records

7. 1 This Program will be retained in the Q-Pulse system in electronic format

7. 2 Printed copies of this Freight Forwarding Order Processing procedure must be downloaded from the Q-Pulse system and once printed are deemed uncontrolled.

7.3 Printed copies must be discarded or destroyed when no longer being used

7.4 Records must be maintained in accordance with the Radiant Document Control Policy

# 8.0 revisions

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| Revision 1 | August 30, 2017 | Initial Document |
| Revision 2 | Sept 21, 2018 | Conversion of workflows to procedures. Correction to Clause 6.1.2.5 |