ORACLE GLOBAL TRADE MANAGEMENT

TRAINING TOPIC: CARRIER GUIDE

Contents

Document Control

Change Record

Date	Author	Version	Change Reference
02/21/2022	Harsha D V	V1	Initial Draft

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Reviewers

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1   Purpose

The purpose of this training document is to educate Carrier's about the navigation and functionality of OTM application.

2   Overview

2.1   Application Login Page

Production URL	https://otmgtm-weatherfordotmgtm.otmgtm.us-phoenix-1.ocs.oraclecloud.com

Upon successful login, the Springboard page is landing page and will be the starting point for all navigations.
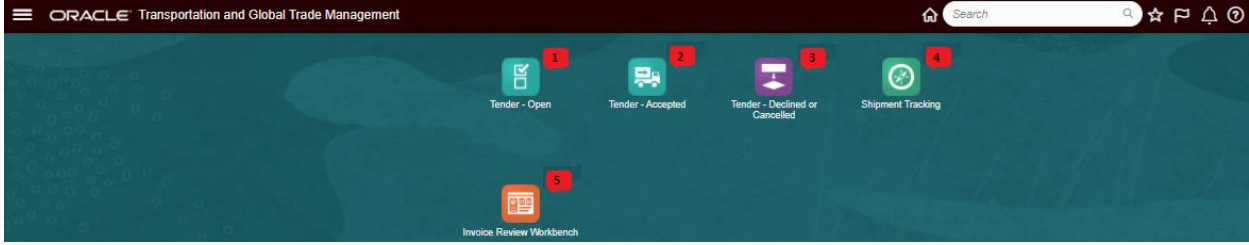
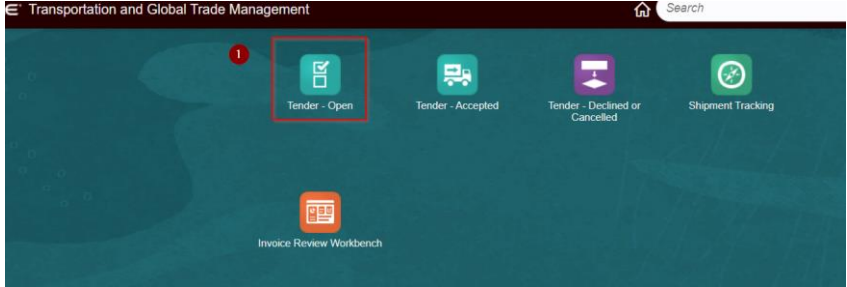Carrier User role will have 5 Major tiles on screen

1. **Tender - Open:** All open tenders will be visible in this screen.
2. **Tender - Accepted:** All accepted tenders will be visible in this screen.
3. **Tender – Declined or Cancelled:** All declined or cancelled tenders will be visible in this screen.
4. **Shipment Tracking:** Tracking events are added/viewed from this screen.
5. **Invoice Review Workbench:** This is single screen view of all Invoices along with associated Invoice Lines and Shipments

3   Tender Execution

3.1   Accept/Decline Tender

Trigger: Shipment tender needs to be Accepted/Declined by Carrier

Prerequisite: Shipment Tendered to the carrier and that Carrier has login to OTM SERVPROV_WFRD role

Instructions	Screenshots
1. Click on **Tender – open** Screen	
2. **Enter** any search criteria from the tender email notification received. Click on search	

3. Select the shipment Tender Offer
4. Click **Edit** to check the details
5. **Scroll** right to check the details
6. Click **Actions** to Accept or Decline the tender offer.

7. Click **Accept tender**

8. New "Accept This Shipment" Pop Up Screen will come.
   Enter any details needed
   Click on **Finished** button

Or

7. Click **Decline tender**

8. New "Decline This Shipment" Pop Up Screen

Instructions	Screenshots
will come. Enter any details needed Click on **Finished** button	
9. Refresh screen using **Refresh** button and Shipment Tender Offer is removed from Online Booking/Tendering screen	
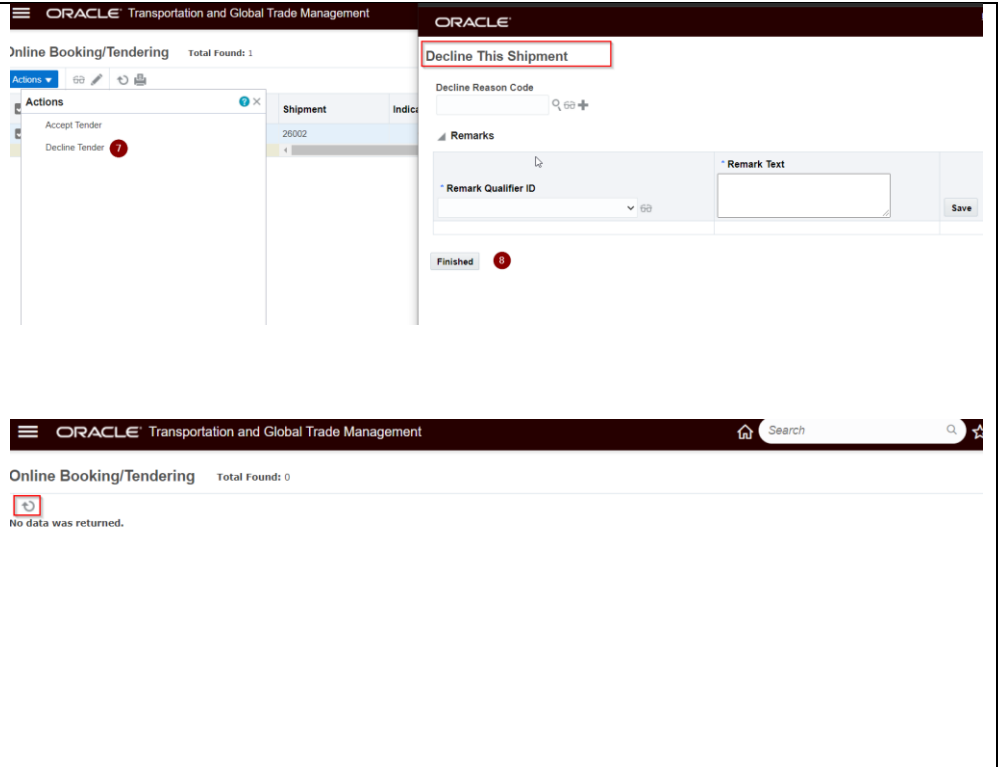
3.2   Submit spot bid Tender

Trigger: Shipment spot bid tender response Bid needs to be submitted by a carrier

Prerequisite: Shipment is spot bid tendered

Instructions	Screenshots
1. Click on **Tender – open** Screen	

| 2. | Enter any search criteria from the tender email notification received. Click on **search** | |

| 3. | **Select** the shipment Tender Offer | |

| 4. | Click **Edit** to check the details |

| 5. | **Scroll** to the Bottom of the page |

| 6. | **Select** the Service provider | |

| 7. | Enter your **Bid amount** |

| 8. | **Submit** bid |

|	
9. Successfully bid submitted screen comes up	Online Booking/Tendering Result > Results **Results** ⑨ **Success** You successfully modified the following records: 383179 ☆ [View] [Edit] [Modify Another]

4 Tracking Events

The below diagram depicts the Shipment execution events captured via integration (or) manually in OTM by Carriers or Planners during the life cycle of Shipment.
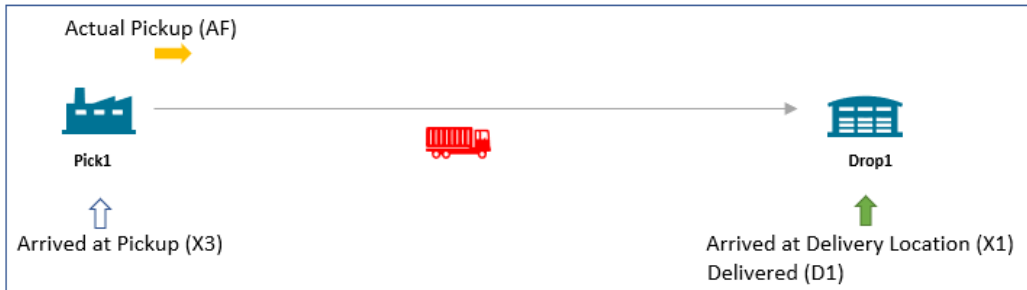
4.1 Adding Tracking Events

| Instructions	Screenshots
1. Click on the menu link "**Shipment Tracking**" 2. Enter the **Shipment ID** for which events to be added 3. Click **Search** button. Shipment matching search criteria will be listed on result page	

|	
4. Select Applicable Shipment 5. Click on **Actions** button	
6. Navigate and click on to Action **Events > Add Shipment Tracking Event**	
7. A new page for entering **Tracking Event** will open. • Select value from Quick Code, as and when Quick code is selected, Responsible Party and Status field gets populated • Enter at what location event has happened in Shipment Stop • Enter Event Date/Time to capture when event has happened • Click on Finished button which is available at the top of the page	
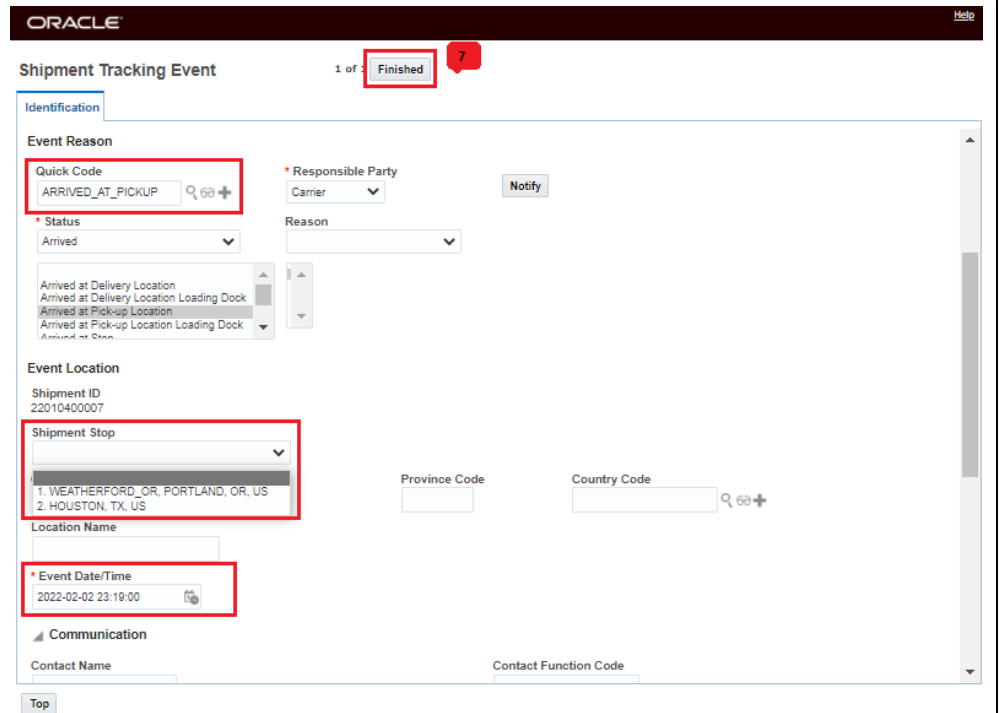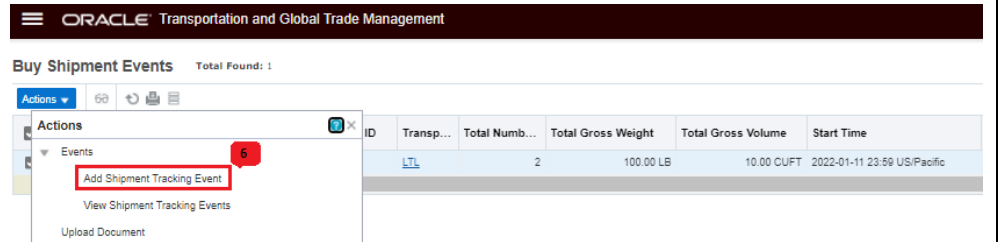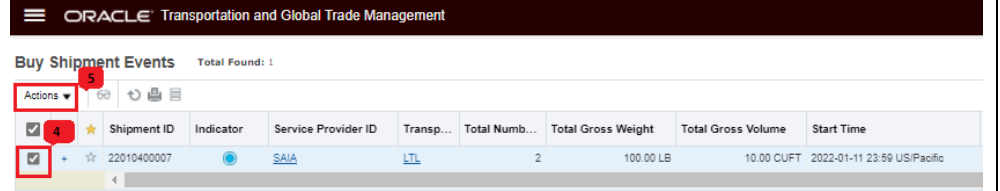
The following quick codes can be used for the related events.

Quick Code	Quick Code Description	Status Code
ACTUAL_PICKUP	Arrived at Pickup	Carrier
ARRIVED_AT_PICKUP	Actual Arrival	Carrier
ARRIVED_AT_DELIVERY	Arrived at Delivery	Carrier
ARRIVED_AT_DEST_PORT	Arrived at Destination Port	Carrier
DELIVERED	Delivered	Carrier

Instructions	Screenshots
8. A confirmation page will be displayed	
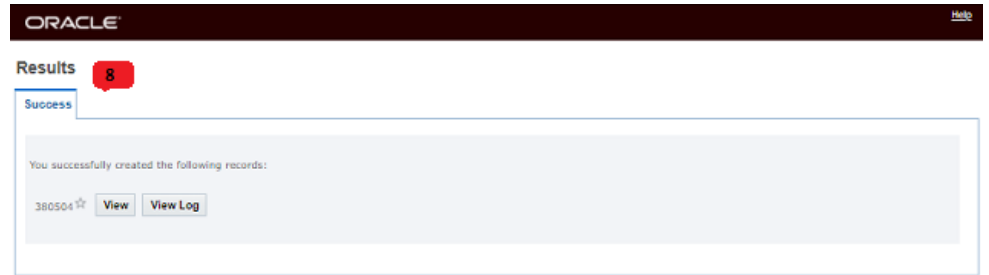
4.2   View Tracking Events

Tracking events added for a shipment can be viewed by following below steps

Instructions	Screenshots
1. Click on the menu link "**Shipment Tracking**" 2. Enter the **Shipment ID** for which events to be added 3. Click **Search** button. Shipment matching search criteria will be listed on result page	

4. Select Applicable Shipment

5. Click on **Actions** button

6. Navigate and click on to Action **Events > View Shipment Tracking Events**

7. A new page will be displayed with the details of the events.

5   Invoicing

This is for NON-EDI carriers to review invoices

Once a carrier has completed the trip and entered the necessary tracking events, the shipment can generate an invoice to be sent to the carrier if the carrier is not integrated to send invoices (EDI).

Shipments (Integrated Carriers) will have an invoice submitted from the carrier via Integration. There are auto approval rules set up to approve the invoice if the tolerance lines up.

In the event a carrier is not yet connected, their invoices will be auto generated by OTM at the shipment level based upon receipt of the shipment status indicating the transportation is complete.

Note: Auto-Generation vs EDI is determined by the Communication method that is present on the service provider.

5.1   Invoice Processing

The carrier will review and either request approval from Weatherford or enter the new requested amount along with a reason to submit to Weatherford.

Requirements for approval (matching rule, attached documents).

1. Delivery complete tracking event must be entered
2. Carrier Invoice number cannot be equal to OTM default
3. Signed POD must be uploaded
4. Carrier must click action to request approval
5. An invoice cannot be edited after it has been approved and vouchered

5.1.1   Invoice Review – Auto Approve

Carrier can perform various actions on the invoice from the "Invoice Review Workbench".

Instructions	Screenshots
1. Click on the **Invoice Review Workbench** • "**Invoice Unapproved**" tab in top pane shows list of unapproved invoices • Invoice Number not entered, and POD document not uploaded on related shipment • Payment Status is PAYMENT REQUEST_NOT SUBMITTED	
2. Select the applicable invoice 3. Click on **Actions** button 4. Navigate and click on to Action **Request Approval** • Payment Status is changed to PAYMENT REQUEST_SUBMISSION FAILED as Invoice Number not entered and POD not uploaded • Approve indicator is changed to YELLOW	
5. Click on the "**Inline Edit**" icon 6. Enter the Carrier Invoice Number 7. Click on the "Save" icon • Invoice Number Entered column will be marked green	

8. Navigate and click on the action "Upload Document" on the related shipment.

9. Browse and select the document to be uploaded on the new page that opens

10. Select SIGENED_POD_BOL from the "Content Management System" dropdown list

11. Click on Upload button

- Confirmation screen will be displayed
- POD column will be marked green

12. Navigate and click on to Action Request Approval

- Payment Status is changed to PAYMENT REQUEST_APPROVED as Invoice is auto approved
- Approve indicator is changed to GREEN
- 'Sent for Payment' is marked as GREEN

Instructions	Screenshots
13. Invoice will be listed in the **'Invoice Approved'** tab	
14. Once the Payment information is received the details will be visible in the **'Invoice Payment Information'** tab • Payment Status is changed to PAYMENT REQUEST_PAYMENT RECEIVED • Approved Cost, Payment Date and Payment Reference Number will be displayed	

5.1.2   Invoice Review – with adjustment

Instructions	Screenshots
1. Click on the **Invoice Review Workbench** • "**Invoice Unapproved**" tab in top pane shows list of unapproved invoices • Invoice Number entered, and POD document uploaded on related shipment • Payment Status is PAYMENT REQUEST_NOT SUBMITTED	

2. Select the invoice, right-click on the record and click on **Edit**. • New page will open with invoice details	
3. Enter '**Carrier Reason for Editing Cost**' in the header page 4. Click on '**Line Items'** button	
5. Click on '**New Line Item'** button in Line Items tab	
6. Enter the details in the new page that opens • Enter Freight Charge • Enter Cost Type • Enter Description • Enter Accessorial Code • Click on **Save** button	

7. New **Line Item** record will be added, click on **Finished** button • Invoice cost is updated to 776.70 8. Navigate and click on the Action **Request Approval** • Payment Status is changed to PAYMENT REQUEST_PENDING REVIEW as the amount is out of tolerance • Approve indicator is changed to ORANGE • Invoice will be reviewed by FINANCE people	