Track & Trace Coordinator Process Job Aid

Version 1.0

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Introduction

The Track & Trace Logistics Coordinator works with transportation providers, customers, and the distribution centers to ensure that deliveries are on-time through daily reports, contact with providers, and updating Salesforce. This job aid provides a comprehensive guide to the work of the Track & Trace Logistics Coordinator.

Daily Work

Each day, the coordinator receives three emails from the team containing four reports:

- **Daily Track & Trace Report**, which contains all orders due to deliver today, for the next 5 business days, and any that are past due.

- **Live Load Verification Report**, which contains all live-load appointments for the day. This comes in the same email as the Daily Track & Trace report, in another tab in the spreadsheet.

- **Daily Yard Report**, which contains information of the loaded trailers at the Indianapolis, San Antonio, and Byahlia Distribution Centers (DCs).

- **Trailer Pool Report**, which provides information about the number of empty trailers at the DCs and the expected number at each site.

Using these reports, as well as Salesforce and My Supply Chain (MSC) by DHL, the Coordinator will verify that shipments are arriving on time, that the record in Salesforce is up-to-date, and make any necessary changes.

The coordinator begins with the Daily Track & Trace Report, which also contains the Live Load Verification Report. This report comes via email. Open it, save a copy to your desktop, and begin emailing the appropriate contact at the providers using the Track & Trace Request Quick Step in Outlook.

When sending the emails, include the information from columns F (Shipment ID) through N (Appointment: Sequence Number). After you send the email, change the Current Status to "in process-awaiting transporter feedback." After you finish with this report, copy the information for your providers and paste it in the master file in Microsoft Teams, and email a copy to Travis Land.

After you complete the Track & Trace report, go to the tab labelled "Live Load Verification" and work the Live Load Verification Report. Using the Quick Step for Live Loads, email the providers and make sure to include the information included in columns C (SCAC), D (Ship From DC), E (Scheduled P/U Time), and F (SID). As with the Track & Trace Report, copy your information into the master file in Microsoft Teams.

Next, open the Daily Yard Report. Listed are all the trailers in the DCs that are loaded and ready for pickup. As with the Track & Trace Report, save a copy to your desktop. Email each provider, providing the information in columns C (Origin) through I (Content.Closed/Loaded Date), using the Quick Step for the Yard Report. Once completed, copy your information into the master file in Microsoft Teams and email a copy to Travis Land.

The final report you will work is the Trailer Pool Report. The Trailer Pool Report indicates how many trailers from each provider are expected at each location, how many are at each location, and what the discrepancy is. If there are fewer trailers on site than there should be, reach out to the provider

using the Trailer Pool Report Quick Step and ask when they will be replenishing their trailer pool. Generally speaking, if they will have the pool replenished within 24 hours, there is no need to escalate. If there are issues or a delay greater than 24 hours, reach out to Travis Land.

Daily Track & Trace Report

The Daily Track & Trace Report contains two separate reports that we use to confirm appointments with the transportation providers. The first tab, labelled "Data", are the past due open appointments and open appointments scheduled to deliver within the next week. The other report is the Live Load Verification Report and is contained in the tab labelled "Live Load Verification".

The T&T Report is central to our daily work. On this sheet, we see upcoming deliveries for the next 7 days, and use it as a reference to reach out to providers to confirm delivery information. As we work through our daily assignments, we update the information for reference by Carrier, including the status, changes made to Salesforce (Salesforce Defect), reasons for rescheduling orders, and comments or notes for more clarity. Below is a guide to navigating and using the spreadsheet

- The status codes are color-coded. Complete-Delivered and Complete-Confirmed ETA both are green. All "In-Process" codes are yellow. Complete-Rescheduled, Complete-Cancelled, and No Contact are red.

Complete-Delivered
Complete-Delivered
Complete-Rescheduled
in process-awaiting transporter feedback
Complete-Confirmed ETA
Complete-Confirmed ETA

- Under the "Status" column, select the appropriate status for the order

| in process-awaiting transporter feedback	▼
Complete-Cancelled	
in process-awaiting transporter feedback	
in process-awaiting CS feedback	
in process-awaiting DC feedback	
in process-awaiting ICT feedback	
in process-awaiting coordinator changes	
No Contact	
Complete-Confirmed ETA	

  o   Status Definitions

Complete-Delivered	transporter has confirmed the load has delivered
Complete-Confirmed ETA	transporter has provided a confirmed ETA and SF apt is not at risk
Complete-Rescheduled	appointment has been rescheduled in SF
Complete-Cancelled	
in process-awaiting transporter feedback	coordinator has reached out to transporter for information and is awaiting feedback
in process-awaiting CS feedback	coordinator has reached out to CS team for information and is awaiting feedback

in process-awaiting DC feedback	coordinator has reached out to DC team for information and is awaiting feedback
in process-awaiting ICT feedback	coordinator has reached out to ICT team for information and is awaiting feedback
in process-awaiting coordinator changes	coordinator has changes to be made in Salesforce or with ICT, Provider or DC
No Contact	didn't reach out to provider for update

- Rescheduled Reason is only used when the order is rescheduled. Here, we provide information about why an order has been rescheduled for tracking purposes. When using this column, be sure to update the comments in the record, as well.
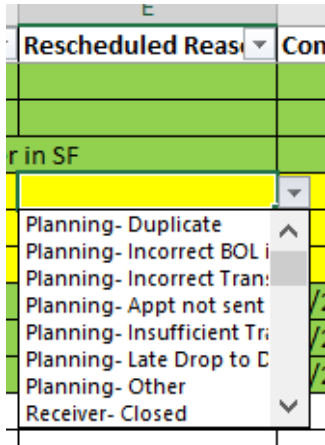
  o Definitions:

Rescheduled Reason	Definition
Factory- BOL was sent to provider late	The provider didn't receive the BOL with enough time to transport to the receiver by the delivery date
Factory- Incorrect BOL/Shipping Documents	The BOL and/or shipping documents were incorrect
Factory- Loaded Incorrectly	There was an issue with how the trailer was loaded, or was loaded on the wrong trailer
Factory- Not Loaded On-Time	The trailer was loaded late, delaying departure from the DC
Factory- Other	
Factory- Weather Related	Weather conditions prevented the provider from picking up the load on time.
Planning- Appointment Not Sent to Transporter	
Planning- Duplicate Shipment	Multiple reservations exist in Salesforce, so the entry was deleted/cancelled
Planning- Incorrect Transporter	The load was reassigned to a different provider, resulting in delays
Planning- Insufficient Loading/Transit Time	The planning team didn't provide enough transport time from the DC to the receiver
Planning- Original Provider Declined Tender	
Planning- Other	
Planning- Planning Error	

Provider- Border Crossing Delay	A delay at the border caused the provider to miss the appointment
Provider- Construction Delay	Road construction caused the provider to miss the appointment
Provider- Dispatch Error	
Provider- Drayage Delay	Applies to rail shipments, a delay in getting the trailer from the DC to the rail yard or from the rail yard to the receiver
Provider- Driver Capacity	The provider doesn't have a driver available to complete the load on time
Provider- Driver Late	Driver late for any other reason, resulting in missing the appointment
Provider- Driver Ran Out of Hours	Driver was required to take a break and missed the appointment
Provider- Driver Sick	
Provider- Early	
Provider- Mechanical Breakdown	Driver delayed due to mechanical issues or an accident
Provider- Multi-Stop, Driver Delayed at Previous Stop	Driver delayed due to a prior load, missing pickup appointment or a subsequent delivery on a multi-stop load
Provider- No Call No Show	
Provider- Other	
Provider- Rail Delay	
Provider- Road Closed	Unplanned route closures and detours cause the provider to miss the appointment
Provider- Traffic Congestion	Traffic congestion cause the provider to miss the appointment
Provider- Weather Related	Weather conditions cause the provider to miss the appointment
Receiver- Destination Closed	Unplanned closures at the receiver
Receiver- Destination was not ready for load	The receiver lacked the dock space or manpower to unload the trailer
Receiver- Other	
Receiver- Requested Earlier Delivery Date	
Receiver- Requested Future Delivery Date	
Receiver- Weather Related	Weather conditions prevent the receiver from being able to unload the trailer

- After receiving the update from the provider, select the appropriate Status, add a Rescheduled Reason if appropriate, and use the Comment column to provide any additional information, such as delivery time and date, or further explanation of cancellations or reschedules.

- Once completed, copy the information for your providers and paste it in the master file in Microsoft Teams, and once the Live Load Verification Report is complete, email a copy to Travis Land.

Live Load Verification Report

Most orders are shipped on drop trailers from the carriers at the DCs. In some cases, however, orders are live loads, loaded on the trailers while the driver is on-site. In these cases, the live loads are scheduled for pickup, and we need to confirm with the providers that they are on-track to make it to their live-load appointments on time. If they are not, we need to email the appropriate DC as soon as possible and let them know that the provider won't make the appointment, and work to reschedule the live load if they can't be worked in.

The Live Load report contains the SCAC code of the provider (C), the originating DC (D), the scheduled pickup time (E), and the SID/B Number (F).

	A	B	C	D	E	F	G	H
1	Track & ▾	Owner ▾	SCAC ▾	Ship From DC ▾	Scheduled P/U Time ▾	SID ▾	Confirmed by: ▾	Comments ▾
2	4/1/2021	Brad Titus	CVQC	ICP	12:00	B21090M00374	Confirmed on time	per Brock
3	4/1/2021	Brad Titus	CVQC	ICP	12:00	B21088M00830	Confirmed on time	per Brock
4	4/1/2021	Brad Titus	suqo	STX2	12:00	B21084M00229	Unconfirmed	Per Toni, this should be a preload, not a live load
5	4/1/2021	Corinne Davison	TMXY	STX2	17:00	B21085M00853		
6	4/1/2021	Corinne Davison	TMXY	STX2	17:00	B21088M00259		
7	4/1/2021	Corinne Davison	TMXY	STX2	17:00	B21088M00257		
8	4/1/2021	Corinne Davison	TMXY	STX2	18:00	B21088M00254		
9	4/1/2021	Corinne Davison	TMXY	STX2	18:00	B21085M00845		
10	4/1/2021	Macy Stout	BNBH	STX2	7:00	B21081M00497		
11	4/1/2021	Macy Stout	BNBH	STX2	7:00	B21075M00817		
12	4/1/2021	Mary Dillon	CLLQ	BYH	9:00	B21088M01148		
13	4/1/2021	Shawna Reed	LRGR	STX1	8:00	B21084M01053		
14	4/1/2021	Shawna Reed	LRGR	STX1	17:30	B21090M00842		
15	4/1/2021	Tim Junkens	WCBM	STX2	12:00	B21085M00440		
16	4/1/2021	Tim Junkens	CWAW	STX2	20:00	B21081M00231		
17	4/1/2021	Tim Junkens	CWAW	STX2	20:00	B21084M00386		
18	4/1/2021	Tim Junkens	BNLS	STX1	14:00	B21088M00869		

In column G, report the status of the live-load appointment:
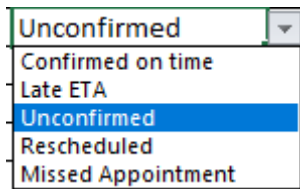
Confirmed on time	The provider will arrive at the appointment on time
Late ETA	The provider will arrive today but will be late for the appointment. Email the DC and see if it can be worked in, or reschedule if not
Unconfirmed	The provider neither confirmed nor denied the appointment
Rescheduled	The provider had to be rescheduled
Missed Appointment	The provider missed the appointment and has not yet been rescheduled

In column H, under comments, include any details regarding the status, such as who confirmed the appointment, or why the appointment was missed, is unconfirmed, or was late. Once completed, copy your data into the master file in Microsoft Teams and, when the Track & Trace Report is complete, email a copy to Travis Land.

Daily Yard Report

The Daily Yard Report shows which trailers are at the DCs ready to be picked up. The expectation is that the providers will pick up the trailers within 48 hours of the trailers being loaded. Each day, we send out emails to the providers to advise which trailers are loaded and inquire when they will be picked up.

The Yard Report is sent each day via email. Open it and save it to your desktop. The report contains the Origin (C), the Provider (D), the Trailer Number (E), BOL# (F), SID/B Number (G), Trailer Status (H), and the date the trailer was loaded (I). Using the Yard Report Quick Step, email the data in columns C – I to the provider and inquire when the loads will be picked up.

Date	Content	Origin	Content.Provider	Content.Trailer	Content.Carrier BOL #	Content.SID #	Content.Trailer status	Content.Closed/Loaded Date	Confirmed ETA	Actual	Scheduled	Notes
4/1/2021	Brad Titus	ICP	BGXP	16046	ICP1366861	B21085M01164	Outbound loaded	3/30/21 12:00 AM	4/1			
4/1/2021	Brad Titus	ICP	BGXP	20115	ICP1366926	B21089M00390	Outbound loaded	3/31/21 12:00 AM	4/1			
4/1/2021	Brad Titus	ICP	BGXP	14082	ICP1367213	B21088M00134	Outbound loaded	3/31/21 12:00 AM	4/1			
4/1/2021	Brad Titus	STX	CLCP	53727	STX145829	B21083M00609	Closed	4/1/21 1:03 AM	4/7			
4/1/2021	Brad Titus	BYH	CNBH	NYKU 422959-2	BYH145638	B21074M00168	Pend Dispatch	3/31/21 1:38 PM	4/1			
4/1/2021	Brad Titus	BYH	CNBH	TCLU 853156-8	BYH146064	B21090M00506	Closed	4/1/21 3:34 AM	4/1			
4/1/2021	Brad Titus	BYH	CNBH	CAIU 892215-0	BYH145701	B21084M01247	Pend Dispatch	4/1/21 5:51 AM	4/1			
4/1/2021	Brad Titus	ICP	CVQC	W91848	ICP1366339	B21085M00771	Outbound loaded	3/29/21 12:00 AM	4/1			
4/1/2021	Brad Titus	ICP	CVQC	P5145611	ICP1366489	B21083M01134	Outbound loaded	3/30/21 12:00 AM	4/1			
4/1/2021	Brad Titus	IND	CVQC	972522	IND229416	B21088M00994	Outbound loaded	3/30/21 3:47 PM	4/1			

Use the column labelled "Confirmed ETA Date" (J) to indicate when the load will be picked up. If the provider can not provide a pickup date yet because the load hasn't been scheduled or there is some other issue, enter "unconfirmed" and include an explanation in the column labelled "Notes" (M). Once completed, copy your data into the master file in Microsoft Teams and email a copy to Travis Land.

Trailer Pool Report

The Trailer Pool Report shows how many empty trailers each provider has at each DC, how many they should have, and any discrepancies between those numbers. If there are fewer trailers than necessary in the yard, the report will indicate that, and we reach out to those providers to find out when they will replenish their trailer pool.

Columns A and B refer to the provider. Columns C-F are the expected number of trailers for each location (Byhalia, Indianapolis, South Texas, and ICP/Lewisburg). Columns H-K are how many are actually on site. Columns M-P shows the variance. Any shortages are indicated as red text in parentheses.

Provider	SCAC	Trailer Pool Peak Requirements					Trailer Pool Actuals 4/1					Pool Variance			
		BYH	ICP	IND	STX		BYH	ICP	IND	STX		BYH	ICP	IND	STX
48 Langham Logistics	LNHM			4			0	8	6	0		0	8	2	0
49 M&W Transportation Co. Inc.	MWTC		2	5			1	8	32	0		1	6	27	0
50 MERCER TRANSPORTATION	MCET		0		3		0	0	0	3		0	0	0	(0)
51 Mesilla Valley	MSLV		1				0	4	0	0		0	3	0	0
52 Mid South Transport, Inc.	MSOH	8	12	1			7	8	2	0		(1)	(4)	1	0
53 Milan Supply Chain Solutions Inc	MLXP		6				2	7	2	0		2	1	2	0

Each Coordinator has an assigned set of providers, so you should go through to the providers that you handle and confirm that their trailer pool is sufficient. If not, use the Trailer Pool Quick Step to email the provider and ask when they will be replenishing their pool. If they will be replenishing within 24 hours, there is no need to escalate. If they don't respond, or will take longer than 24 hours to replenish the trailer pool, forward the information to Travis Land for further handling.

Salesforce

Salesforce is a Client Relationship Management (CRM) Tool. We use it to communicate with our customers. We track appointments and schedules and can see open delivery appointments at the various customer locations. Additionally, we report delays, delivery times, or any other notes related to the orders and delivery appointments. Below is a guide to using Salesforce and how to perform various functions.

Scheduling Initial Appointment in Salesforce

- Select the "Appointments" tab at the top of the page

- Select the drop down next to "Recently Viewed" and enter the name of the location. In the results, select the Location Name with Open Slots
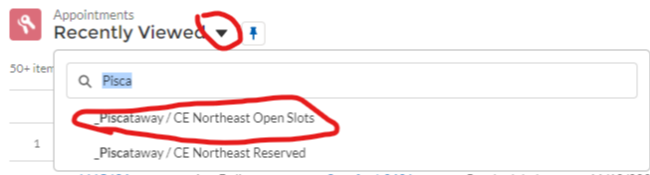
- A list will appear with available open appointments. Select your desired appointment by clicking the drop-down arrow on the right and selecting "Edit". **NOTE: If an appointment is not available for the desired date or time, you can request an appointment.**

- Assign this appointment to the appropriate Bill of Lading and, if necessary, the stop order

- Once entered, click the green "Save" button on the bottom.

System Information

Cancel   Save & New   Save

Manually Create an Appointment in Salesforce

In most cases, we won't manually create appointments in Salesforce. The customer sets available appointments and we can assign those appointments to specific orders. However, in some circumstances, it is necessary to create an appointment (also called forcing an appointment), and there are a couple of key steps that need to be taken to make sure it works properly. **NOTE: You should only manually create an appointment in Salesforce if you have approval from the customer to do this. Include the name of who approved this in the notes and assign the appointment to the customer.**

- From the "Appointments" tab in Salesforce, select the button labelled "New" on the top right side of the screen.

| Home | Appointments | Appointment Requests | Bill of Ladings | Transportation Schedule | Accounts | Contacts | Reports | Dashboards |

Appointments
Recently Viewed ▼
50+ items • Updated a few seconds ago

Search this list...

New
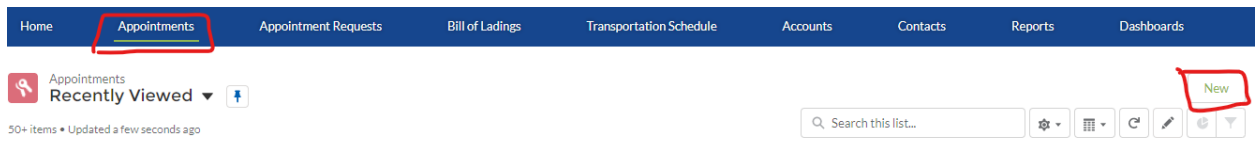
- Fill out the required information, including "Slot Avail for", "Warehouse", "Start Date and Time" and "End Date and Time", "Slot Notes" (name of approver), "Bill of Lading#", and "Stop Order" if necessary. Select Save.

Destination Warehouse

Seq No

* Slot Avail for:

--None--

* Warehouse

Search Transportation Schedules...

Added per Factory DC Request

--None--

Record Type

Standard Appointment

Information

Start

Date   Time

End

Date   Time

* Status

Open

View all dependencies

Slot Notes

Bill of Lading Details

Bill of Lading#

Search Bill of Ladings...

Stop Order

--None--

Cancel   Save & New   Save

- Next, assign the appointment to the provider. **NOTE: If you don't assign the appointment, it won't show up in their appointments, and will likely cause problems when the driver arrives to deliver the load.**

   o Enter the BOL number in the search bar and select the order.

Q STX144801

Appointment Requests	Bill of Ladings	Transportation Schedule	Accounts	Contacts	Reports	Dashbo

Bill of Ladings
1 Result

BILL OF LADING NAME	TRANSPORTATION COMPANY	STOP 1	TOTAL PIECES	TRAILER#
STX144801	Summit Trucking, Inc.		237	5629

o From the "Related" tab, select the "Seq No".

o Scroll down to the "System Information" and select the icon next to the owner. If you created the order, it will be your name.

o Enter the name of the person who approved the new appointment and select "Change Owner".

Requesting an Appointment in Salesforce

- If the requested delivery date isn't available in open appointments, you can submit an appointment request to the customer.

- Select "Appointment Requests" from the top menu bar

- Select "New"
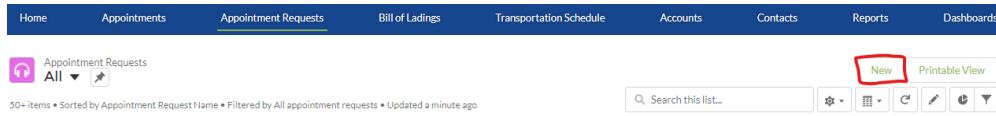
- Fill out the required information, including

    o Distribution Center (DC) requesting the appointment

    o Ship To Warehouse

    o Requested Appointment Date

    o BOL Requesting to Ship (very important if this is a reschedule)

    o Pieces on BOL

    o Comments – you should add comments explaining the situation to the customer. Often, this request will be due to a reschedule, and customers will be willing to work in the driver.

- When finished, select "Save"
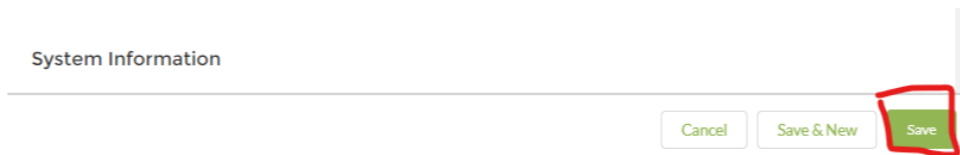
Completing Appointments in Salesforce

- Upon logging in, you should have a screen that resembles the image below.

- In the top right, there is a search box. Using this search box, enter the BOL number and press "Enter".

- This is the search results page. As you can see, on the left are different ways you can filter your search results, but in this case, only one result is returned. Select the blue BOL number in the results.

- Upon opening the Bill of Lading record, there are two tabs at the top. The first tab is active, the Details tab, where information about the shipment, recent changes, and comments are displayed. The other tab, "Related", is how the record can be updated or edited. Select "Related."

- In the "Related" tab, you can find additional information related to the BOL, including appointments, changes to the BOL number, and other information. Select the down-arrow next to the appointment time, then select "Edit".

- In the window that pops up, you can review and update the details about the delivery appointment. Scrolling down, you'll find the heading "Information", with the date and time

of the delivery appointment, and then a drop-down box for the status of the delivery.

Information

Start

Date	Time
10/9/2020 📅	3:00 PM 🕐

End

Date	Time
10/9/2020 📅	5:00 PM 🕐

Slot Notes

* Status

--None--

Completed

Open

Rescheduled

✔ Reserved

Unavailable

Intermodal Pending

Stop Order

Stop 1 ▼

- o   Completed: the order has been delivered

- o   Open: select when creating the appointment (switches to "Reserved" when saved)

- o   Rescheduled: the appointment has been rescheduled for a different time

- o   Reserved: the appointment is set for this time and on-schedule to deliver on time

- o   Unavailable: the customer uses this to block out times for bookings; we don't use this

- o   Intermodal Pending: the delivery via rail is delayed

- To update an order that has been delivered (and to ensure that it doesn't show up on the next day's report), select "Completed"

- When you select "Completed", scroll down to "Performance Information", and you'll find that new required fields have opened up.

Performance Information

* Performance	**Late RC**
--None-- ▼	--None-- ▼
View all dependencies	View all dependencies
Arrival Time	**Resched/Cancel Type**
Date Time	--None-- ▼
📅 🕐	View all dependencies
Departure Time	**Rescheduled RC**
Date Time	--None-- ▼
📅 🕐	View all dependencies
Shipment Notes	**Date New Delivery Time Proposed?**
	--None-- ▼
	View all dependencies
	Damaged Product
	☐

Performance Information

* Performance

--None-- ▼

- ✔ --None--
- On Time
- Late - Destination Issue
- Late - Shipping Issue
- Early

- o Under Performance, select the appropriate indicator

  - ■ On Time: the order was delivered within the delivery window, +/- 1 hour of the earliest and latest times

  - ■ Late – Destination Issue: the delivery was outside of the appointment window due to a problem with the customer location

    - • DA: Act of God

    - • DC: Destination Closed

    - • DE: No employees available to unload

    - • DN: Dock was not ready for load

    - • DW: Weather Related

  - ■ Late – Shipping Issue: the delivery was outside of the appointment window due to a problem with the shipper

    - • TA: Act of God

    - • TB: Truck Breakdown

- TC: DC did not give sufficient time to pickup

- TD: Driver was out of hours

- TF: BOL was faxed late

- TG: NO CALL NO SHOW

- TM: Multi-stop unloaded late

- TN: Driver not dispatched in time

- TO: Driver error

- TP: Late pick-up from origin DC

- TQ: Rail Delay

- TS: Driver was sick

- TT: Traffic congestion

- TW: Weather related

- TX: Construction delay

- Y: Border Crossing

  - Early: the delivery was earlier than the appointment window

  o After selecting the appropriate performance identifier, enter the date and time of the delivery.

- Select "Save". This BOL will not appear in your report going forward.

Rescheduling Appointments in Salesforce

- Upon logging in, you should have a screen that resembles the image below.

- In the top right, there is a search box. Using this search box, enter the BOL number and press "Enter".

- This is the search results page. As you can see, on the left are different ways you can filter your search results, but in this case, only one result is returned. Select the blue BOL number in the results.

- Upon opening the Bill of Lading record, there are two tabs at the top. The first tab is active, the Details tab, where information about the shipment, recent changes, and comments are displayed. The other tab, "Related", is how the record can be updated or edited. Select "Related."

- In the "Related" tab, you can find additional information related to the BOL, including appointments, changes to the BOL number, and other information. Select the down-arrow next to the appointment time, then select "Edit".

- In the window that pops up, you can review and update the details about the delivery appointment. Scrolling down, you'll find the heading "Information", with the date and time of the delivery appointment, and then a drop-down box for the status of the delivery. Select "Rescheduled".

Information

Start

Date		Time	
10/9/2020	📅	3:00 PM	🕐

End

Date		Time	
10/9/2020	📅	5:00 PM	🕐

Slot Notes

* Status

- --None--
- Completed
- Open
- Rescheduled
- ✔ Reserved
- Unavailable
- Intermodal Pending

Stop Order

Stop 1 ▼

- Under "Performance Information", select the Reschedule/Cancellation Type

Performance Information

Performance	Late RC
--None-- ▼	--None-- ▼
View all dependencies	View all dependencies

Arrival Time

* Resched/Cancel Type

Date	Time
📅	🕐

--None-- ▼

- ✔ --None--
- Factory
- Destination
- Provider

Departure Time

Date	Time
📅	🕐

View all dependencies

Shipment Notes

Rescheduled Reason
Factory- BOL was sent to provider late
Factory- Incorrect BOL/Shipping Documents
Factory- Loaded Incorrectly
Factory- Not Loaded On-Time
Factory- Other
Factory- Weather Related
Planning- Appointment Not Sent to Transporter
Planning- Duplicate Shipment
Planning- Incorrect Transporter
Planning- Insufficient Loading/Transit Time
Planning- Original Provider Declined Tender

Planning- Other
Planning- Planning Error
Provider- Border Crossing Delay
Provider- Construction Delay
Provider- Dispatch Error
Provider- Drayage Delay
Provider- Driver Capacity
Provider- Driver Late
Provider- Driver Ran Out of Hours
Provider- Driver Sick
Provider- Early
Provider- Mechanical Breakdown
Provider- Multi-Stop, Driver Delayed at Previous Stop
Provider- No Call No Show
Provider- Other
Provider- Rail Delay
Provider- Road Closed
Provider- Traffic Congestion
Provider- Weather Related
Receiver- Destination Closed
Receiver- Destination was not ready for load
Receiver- Other
Receiver- Requested Earlier Delivery Date
Receiver- Requested Future Delivery Date
Receiver- Weather Related

- Select if the Date of the new Delivery Time Proposed is before or after the original delivery date, then select Save & New

- Follow the procedure to set up a new appointment in Salesforce as outlined above
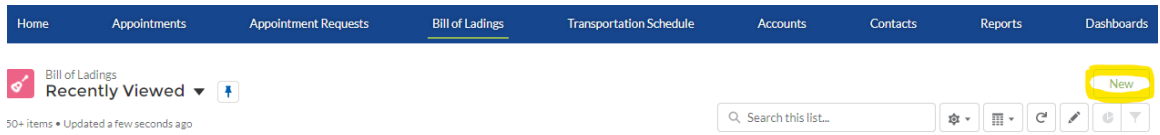
Converting SID to BOL

- Reference the spreadsheet with the SIDs and BOLS. Where there is no BOL, enter the SID into Salesforce and My Supply Chain.

Bill of Lading#	Carrier BOL
B20335M00482	STX122344
B20342M00473	STX122536
B20336M00281	STX122463
B20337M00368	STX122797
B20350M00823	#N/A

- In MSC, enter the SID and scroll down to Additional References. The BOL will be listed next to BUSINESS_UNIT

Units	Transport Map	Transport Stops	Carrier	Related Items	Transport History	Consolidated Order History	Additional References

Reference Type ⇕ ▼	Reference ⇕ ▼
Shipment ID	B20350M00823
PO	IND272985MW02ODS
CR	0075293907
CN	477433
BUSINESS_UNIT	IND226111

- Copy the BOL number and go to Salesforce. Select the pencil icon next to the Bill of Lading Name and enter the new BOL number.

DETAILS   RELATED

* Shipping From
INDIANAPOLIS

* Bill of Lading Name
IND226218

* Trailer#
T769

* Transportation Company
Southwest Freightlines ✕

* Mode
Multi-Stop

Other Name

* Total Pieces
182

Intermodal Pending ☐

SCAC
SWGH

ETA Ship Date   Cancel   Save

- Enter the SID into the comments section. Select Save.

∨ Comments

BOL Comments
B20353M00272

Created By
Faith Johnson, 12/18/2020 8:35 AM

Last Modified By
Faith Johnson, 12/22/2020 11:14 AM

Cancel   Save

- EXCEPTION: In the event that the BOL provided by MSC has previously been used, change the BOL number to the old order in SF by adding an "A" to the end of the BOL number, and then use the original BOL number for the new order.

Creating BOLs

- In Salesforce, select Bill of Ladings in the top menu. Select New.

- Enter the required information. Select Save.

Intermodal Pending

Unlike other orders, Intermodal Shipments aren't scheduled by planning in Salesforce. The intermodal transporters – those shipped via rail – aren't scheduled until the provider confirms with the Track & Trace Team. Each day, the providers send an updated Intermodal Scheduling Spreadsheet with notes and appointment requests.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	Date	SCAC	Stop #	Customer Name	Destination City	ation	Shipment ID	BOL #	Trailer #	Pieces	Requested	Granted Delivery	Rescheduled Delivery #1	Rescheduled Delivery #2	Notes/Reason for reschedule	Load #
2	Date	CELC	Stop 1	ABDC Sales	CITY	ST	B20000M0000	ABC000000	ABC2345	0	0/00/0000 0	0/00/0000 0:00				PROVIDER
1389	3/29/2021	CELC	1	CARRIER FLORIDA	ORLANDO	FL	B21067M01546		CSXU632385	69	1-Apr	4/2/21 0800			rail ETA updated. Reset to 4/3	C806863
1396	3/29/2021	CELC	1	CARRIER FLORIDA	YBOR CITY	FL	B21078M00365	BYH144179	CSXU631409	88	1-Apr	4/2/21 1200			rail ETA updated. Reset to 4/3	C808625
1405	3/30/2021	CELC	1	SIGLER younger creek	SACRAMENTO	CA	B21078M00457	BYH144123	UMXU232122	120	5-Apr	4/5/21 0730			rail ETA updated. Reset for 4/6	C808632
1409	3/30/2021	CELC	1	SLAKEY BROTHERS	SAN JOSE	CA	B21077M01354	BYH144165	EMHU244342	135	5-Apr	4/5/21 1030			rail ETA updated. Reset for 4/6	C808630
1419	3/31/2021	CELC	1	AIREFCO	TUALATIN	OR	B21083M01129	IND229296	EMHU2058088	148	3-Apr	working on this				C810060
1421	4/1/2021	CELC	1	CE NORTHEAST	BOHEMIA	NY	B21083M00921	BYH145127	EMHU243989	147	5-Apr					C810659
1422																
1423	4/1/2021	CELC	1	SIGLER	BREA	CA	B21088M01117	IND229423	EMHU201899	137	6-Apr					C811453
1424	4/1/2021	CELC	2	SIGLER	LAKEWOOD	CA	B21088M01117	IND229423	EMHU201899	46	6-Apr					C811453
1425																

The Intermodal Scheduling Spreadsheet contains information about the provider (B), the number of stops in the load (C), the customer (D, E, and F), the Shipment ID and BOL (G and H), and the requested delivery date (K). In column O, the provider can request a reschedule if there is a rail delay.

When you receive the report, take care of the reschedule requests first. Then assign new appointments as requested in column K. If there is no BOL created yet, create a new BOL. Take a look at column C to make sure that both appointments are scheduled in a multi-stop load. When completed, email the report back to the provider and copy Laura Berndt.

My Supply Chain (MSC) by DHL

- Open My Supply Chain at https://mysctrackandtrace.dhl.com/dashboard and enter the BOL number or the B number
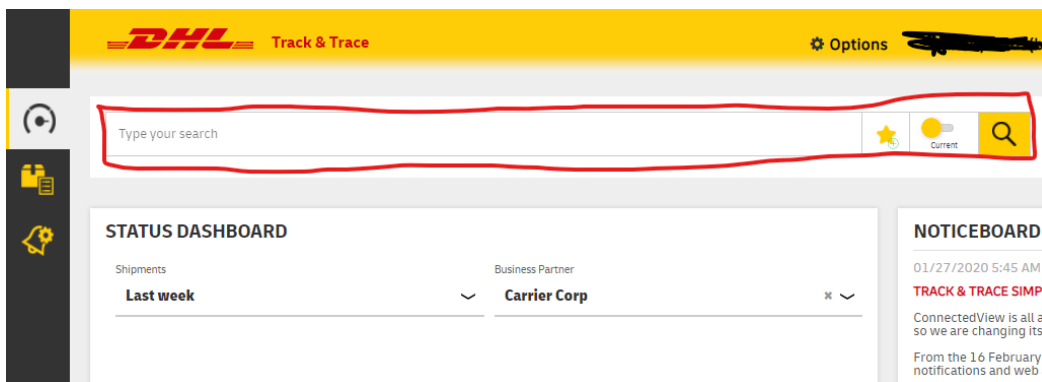
- Select "Details" on the appropriate search result
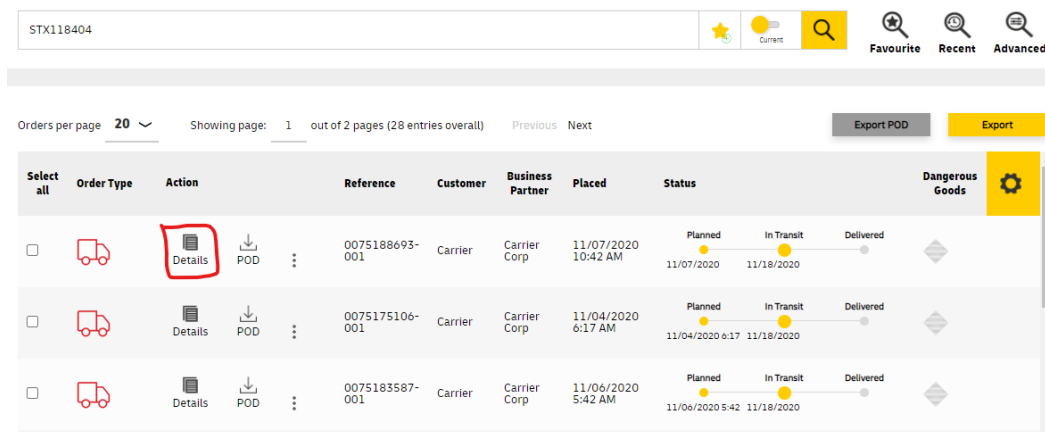
- Scroll down to the menu tabs and select the tab with the required information. Usually, this tool is used to track a shipment and determine when the delivery has occurred, but there is other valuable information that can be gleaned. For instance, if the provider has changed,

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you can find the most up to date information under the "Carrier" tab.

- o Units

- o Transport Map

- o Transport Stops

o   Carrier

Code	Name	Type	Vehicle Driver	Vehicle Tractor	Vehicle Trailer	Vehicle Type
SUQO	SUMMIT TRANSPORTATION, INC.				5752	53DV

o   Transport History

Date	Event	Original Code	Event Type	Description	Alt. Description	Comment	Sign	Signature Name	Address
11/18/2020 11:30 AM	IN_TRANSIT	X6	Order	In Transit	En Route to Delivery Location (send X6 every 4-6 hours while en route)				GOODLETTSVILLE, TN
11/18/2020 10:22 AM	IN_TRANSIT	X6	Order	In Transit	En Route to Delivery Location (send X6 every 4-6 hours while en route)				LOBELVILLE, TN
11/18/2020 8:21 AM	IN_TRANSIT	X6	Order	In Transit	En Route to Delivery Location (send X6 every 4-6 hours while en route)				STANTON, TN
11/18/2020 6:15 AM	IN_TRANSIT	X6	Order	In Transit	En Route to Delivery Location (send X6 every 4-6 hours while en route)				PALESTINE, AR
11/18/2020 4:02 AM	IN_TRANSIT	X6	Order	In Transit	En Route to Delivery Location (send X6 every 4-6 hours while en route)				PALESTINE, AR

Microsoft Teams

Microsoft Teams is used for team chat, team meetings, and sharing files. In Teams, we have shared files that contain updates from each daily report. To access the files, select the "Teams" icon on the side of the window.

Select the file you're updating, and when pasting your content, be sure to remove all the formatting and only paste the values.

When finished, click "Close". It saves automatically.

Appendix A: Creating a Quick Step in Microsoft Outlook

To increase speed, clarity, and consistency when reaching out to providers, use Quick Steps in Microsoft Outlook.
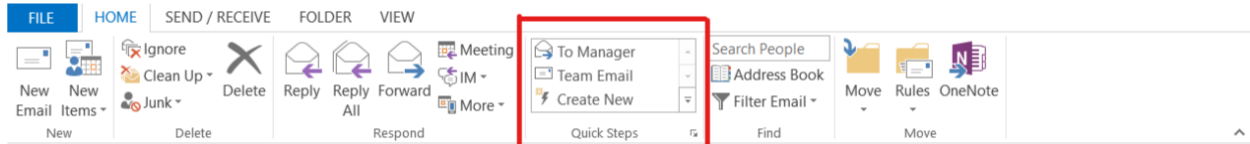
1. Right click in the Quick Steps menu and select "Manage Quick Steps"

2. Create a new Quick Step

3. Select "New", then "New Email to:"

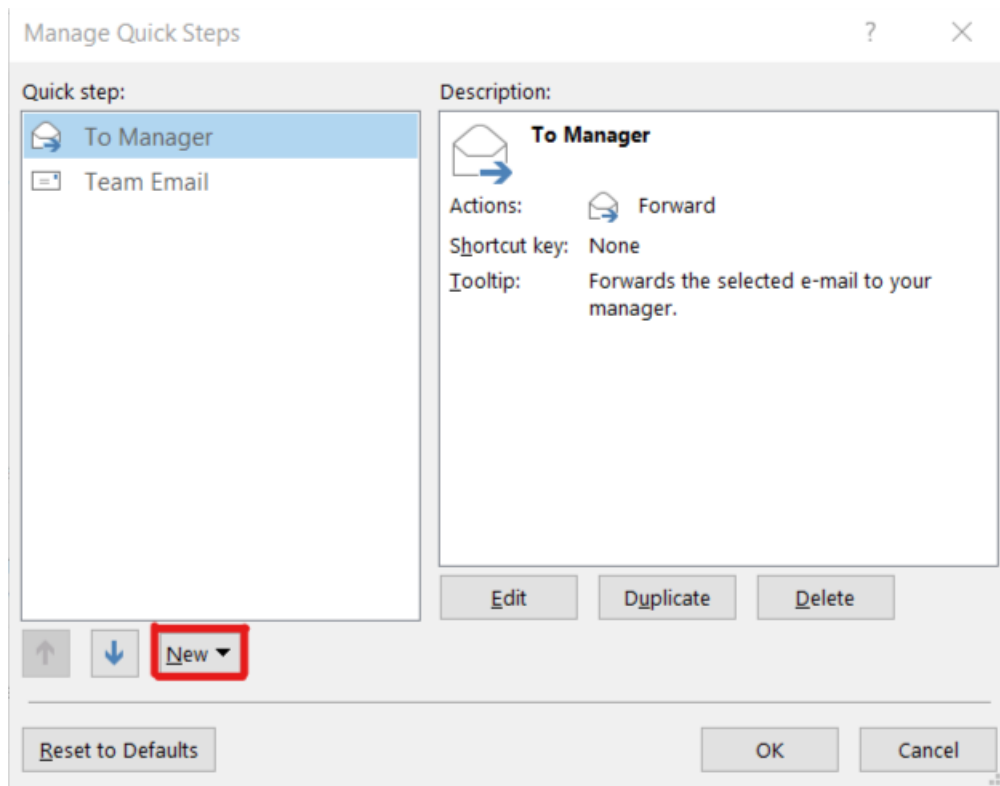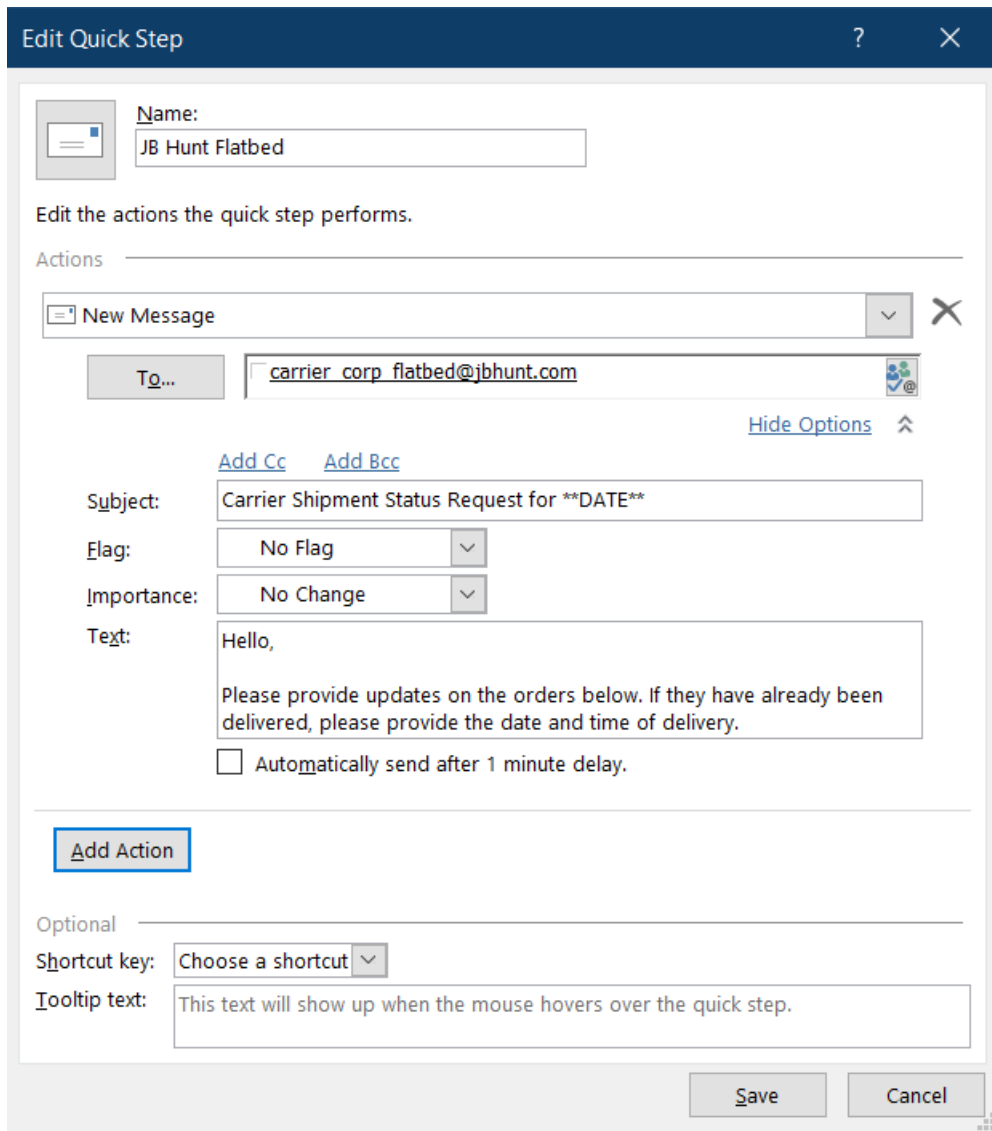4. Enter the details for the email you're setting up. Click "Show Options" to see additional fields.

Edit Quick Step   ?   ×

Name:
JB Hunt Flatbed

Edit the actions the quick step performs.

Actions

New Message   ⌄   ✕

To...   carrier_corp_flatbed@jbhunt.com

Hide Options ⌃

Add Cc   Add Bcc

Subject: Carrier Shipment Status Request for **DATE**

Flag: No Flag ⌄

Importance: No Change ⌄

Text: Hello,

Please provide updates on the orders below. If they have already been delivered, please provide the date and time of delivery.

☐ Automatically send after 1 minute delay.

Add Action

Optional

Shortcut key: Choose a shortcut ⌄

Tooltip text: This text will show up when the mouse hovers over the quick step.

Save   Cancel

a. If this is an email to a specific person or team, enter the email address in the "To…" field.

b. In the subject field, enter the subject of your email.

c. In the text field, enter your message.

   i. Track & Trace Email
   "Hello,

   Please provide updates on the orders below. If they have already been delivered, please provide the date and time of delivery."

   ii. Yard Report
   "Hello,

   Please provide a pickup date for the orders below."

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iii. Live Load Confirmation
"Hello,

Please confirm the live load appointment times listed below."

iv. Trailer Pool Report
"Hello,

According to the yard report, there are currently ### trailers in the yard at XXXXXXX, and we need ###. When will you be delivering more trailers?"

1. On this email, fill in the XXX and ### blocks with the specific information when sending.

d. When finished, select SAVE.

Appendix B: DC, Planning, and Customer Service Contacts

ICP/Lewisburg Location

DC: dispatch.pd@carrier.com; andrea.posey@carrier.com

Planning: ICTLB@dhl.com
    CC: christian.mosburg@dhl.com
    Escalation: patonia.buchanan@dhl.com

IND Location

DC: chris.maxwell@carrier.com; stanley.rhodes2@carrier.com

Planning: ICTINDY@dhl.com
    CC: christian.mosburg@dhl.com
    Escalation: patonia.buchanan@dhl.com

BYH Location

DC: tarvis.ross@dhl.com; melanie.hankins@dhl.com

Planning: ICTBYH@dhl.com
    CC: christian.mosburg@dhl.com
    Escalation: patonia.buchanan@dhl.com

STX 1 Location

DC: joe.l.martinez@dhl.com

Planning: ICTSTX1@dhl.com
    CC: christopher.arnold2@dhl.com; christian.mosburg@dhl.com
    Escalation: patonia.buchanan@dhl.com

STX 2 Location

DC: susanna.ellison2@dhl.com

Planning: ICTSTX2@dhl.com
    CC: christopher.arnold2@dhl.com; christian.mosburg@dhl.com
    Escalation: patonia.buchanan@dhl.com

Customer Service Contacts

Susie Jamison	877-584-0174	BAKER DISTRIBUTING
distsvc.sjamison@carrier.com	Ext 7921	CE HOMANS
		CE MID ATLANTIC
		CE NORTHEAST
		DASCO
		PEIRCE PHELPS INC.
Lisa Gray	877-584-0174	CE CANADA
distsvc.lgray@carrier.com	Ext 7928	CE FLORIDA
		CE SOUTHEAST
		CMX-A Direct Shipments
		CMX-E Direct Shipments
		Collierville Direct Shipments
		MMC NATIONAL ACCOUNTS
Eric Leszczynski	877-584-0174	CARRIER INTERAMERICA (CIAC)
distsvc.eleszczynski@carrier.com	Ext 7933	CE MEXICO
		CE SOUTH CENTRAL
		CE SOUTH TEXAS
		ICP EXPORT
		ROBERT MADDEN
Byron Gault	877-584-0174	AIREFCO
distsvc.bgault@carrier.com		AUER STEEL
		CARRIER HAWAII
		HABEGGER / CAC
		REFRIG SALES
Stephen Reusser	877-584-0174	BEHLER-YOUNG
distsvc.sreusser@carrier.com	ext-7382	CARRIER GREAT LAKES
		CE COMFORT PRODUCTS
		SIGLER AZ
		SIGLER CAL
		SLAKEY
Ben Reinoehl	877-584-0174	DIST. CORP. OF NEW ENGLAND

distsvc.breinoehl@carrier.com	ext-7392	LOHMILLER / CARRIER WEST
		MINGLEDORFFS / BRYANT AIR
		TEC
		TEMPERATURE SYSTEMS
		WEATHERTECH DIST
Tina Taylor	877-584-0174	CE MID SOUTH
distsvc.ataylor@carrier.com	ext-2959	CONTRACTORS HTG & CLG
		KOCH AIR CONDITIONING
		MINNESOTA AIR INC.
		R.J. MURRAY CO. INC.
		SHORE DIST. INC.
		STANDARD AIR & LITE CORP