Oracle® Transportation Execution

User's Guide

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Oracle Transportation Execution User's Guide, Release 11*i*

Part No. B10666-03

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Preface

Intended Audience

Welcome to Release 11*i* of the *Oracle Transportation Execution User's Guide*.

See Related Documents on page x for more Oracle Applications product information.

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Structure

1 Introduction to Oracle Transportation Execution

2 Using Oracle Transportation Execution

3 Inbound Logistics

4 Carrier Portal
A Windows and Navigator Paths
B Inbound Status Changes
C Inbound Logistics Purchase Order Changes

Related Documents

Oracle Order Management User's Guide

Oracle Shipping Execution User's Guide

Oracle Warehouse Management User's Guide

Oracle Inventory User's Guide

Oracle Transportation Planning User's Guide

Do Not Use Database Tools to Modify Oracle Applications Data

Oracle STRONGLY RECOMMENDS that you never use SQL*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle Applications data unless otherwise instructed.

Oracle provides powerful tools you can use to create, store, change, retrieve, and maintain information in an Oracle database. But if you use Oracle tools such as SQL*Plus to modify Oracle Applications data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle Applications tables are interrelated, any change you make using an Oracle Applications form can update many tables at once. But when you modify Oracle Applications data using anything other than Oracle Applications, you may change a row in one table without making corresponding changes in related tables. If your tables get out of synchronization with each other, you risk retrieving erroneous information and you risk unpredictable results throughout Oracle Applications.

When you use Oracle Applications to modify your data, Oracle Applications automatically checks that your changes are valid. Oracle Applications also keeps track of who changes information. If you enter information into database tables using database tools, you may store invalid information. You also lose the ability to track who has changed your information because SQL*Plus and other database tools do not keep a record of changes.

1

Introduction to Oracle Transportation Execution

This chapter covers the following topics:

- Overview of Oracle Transportation Execution
- Features of Oracle Transportation Execution

Overview of Oracle Transportation Execution

Oracle Transportation Execution enables companies that manufacture or distribute goods to better communicate, collaborate, and manage their transportation processes. Oracle Transportation Execution enables transactions to flow seamlessly between Oracle Order Management and Oracle Warehouse Management modules. Using Oracle Transportation Execution, you can manage your fulfillment needs with complete visibility to carrier rates, schedules, intransit events, and delivery information. You can use Oracle Transportation Execution and Oracle Shipping Execution to streamline the entire logistics execution process, from picking and packing, to shipping and final delivery. You can manage deliveries with both carriers and customers, and can also process and rate deliveries according to carrier requirements. Oracle Transportation Execution enables you to automatically assign carriers to deliveries based on customer requirements. Oracle Transportation Execution integrates with Oracle Warehouse Management and Oracle Order Management to provide you a complete integrated logistics solution. From the customer order to the final delivery, Oracle Transportation Execution provides you an automated process ensuring that your customer orders are efficiently processed.

Features of Oracle Transportation Execution

Oracle Transportation Execution includes the following features:

- Automated transportation processes: For streamlining the planning and execution processes i.e, delivery planning, carrier selection, freight rating, carrier manifesting, and the final delivery.
- Carrier selection: A flexible rule based engine to facilitate carrier selection. Carrier selection enables you to assign specific carriers, modes, freight terms, and service levels based on delivery characteristics. Delivery characteristics include origin/destination regions and zones, weight, volume, and transit time.
- Carrier rate loading: Carrier rates can be loaded in Oracle Transportation Execution to support the delivery rating process.

- Delivery tracking: Inbound tracking messages can be received from carriers with updated delivery tracking status. A shipper and a carrier can setup the tracking requirements including notification events, and the frequency of the notification events. The tracking message responses can be automatically received from the carrier without any direct intervention from the user.
- Integrated freight rating: You can apply carrier freight rates to deliveries by searching for carriers, selecting the carrier service that meets your delivery requirements, calculating a freight estimate, and applying the estimate to the delivery. You can also reduce freight costs by consolidating multiple deliveries. Freight rates are calculated in Oracle Transportation Execution and sent to Oracle Order Management. Freight rates can be used for applying freight charges to the customer invoice.
- Manifest messaging: Support for an open XML framework for easy integration with partner carrier manifesting systems. Through XML messages, you can send delivery details to the partner manifest applications. Delivery details can be extracted manually or automatically to be sent to the carrier manifesting systems. The manifest applications can respond back to Oracle Transportation Execution with appropriate delivery details.
- Third party warehouse messaging: You can also send XML equivalent ASC X12 940 and 945 EDI messages to your third party warehouse. The message indicates the goods that the warehouse needs to ship on behalf of the shipper. Oracle Transportation Execution extracts the delivery information and sends it to the third party warehouse as a Shipment Request transaction. The Shipment Advice transaction is the response from the warehouse indicating what was shipped. After the message is received from the warehouse, then, the delivery is confirmed.
- Multi-modal trip planning and execution: You can plan departures and deliveries with carriers or internal fleet. Creating trips and stops enables you to design a transportation network.
- Load tendering: involves transmitting a load tender request to a carrier and enabling the carrier to respond to the request by accepting or rejecting the request. The load tender request includes the characteristics of a delivery, such as origin, and destination address, delivery weight, and volume, pickup delivery date, and others. The load tender request makes a delivery visible by enabling the carrier to view the characteristics of a delivery.
- Compatibility constraints: You can setup compatibility constraints such as organization-facility, carrier-facility, customer-facility, mode-facility, item-carrier, item-mode, item-facility, region/zone - facility, and customer-customer to create mutual compatibility requirements for different transportation actions. See: *Oracle Transportation Execution Implementation Manual.*
- Facility definition: A facility is an entity needed to define a transportation network. Facilities can be used for defining constraints.
- Lane Groups: Lane groups are a group of lanes that share a common carrier and mode of transport. Lane groups are used by Oracle Transportation Planning for carrier commitment purposes. See: *Oracle Transportation Execution Implementation Manual.*
- Inbound Logistics: The Inbound Logistics functionality enables you to manage your organizations inbound freight from your suppliers. Oracle Purchasing sends information to Oracle Shipping Execution, which is then visible to Oracle

Transportation Execution. This enables you to have full control over inbound shipments.

- Freight Estimation: Freight Estimation enables you to obtain freight cost estimates without the need for an order or a delivery. You enter the minimum amount of criteria into the user interface to submit for estimation, including: origin and destination address or location, origin and destination country, weight, weight unit of measure, and ship date, as well as other optional criteria.

  Oracle Transportation Execution will estimate the cost using the freight rating engine and return the estimated freight cost in an organized table within the Freight Estimation page. Freight estimation can be used to estimate freight costs for a customer, by the Customer Service or Shipping department, or to quickly check rates once they have been loaded into the system.

2

Using Oracle Transportation Execution

This chapter covers the following topics:

- Deliveries
- Searching for Deliveries
- Viewing and Updating Deliveries
- Cancelling a Service for a Delivery
- Viewing a Delivery Leg
- Creating a Delivery Leg
- Splitting a Delivery Leg into Segments
- Delivery Distance and Transit Times
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- Carrier Services
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- Viewing Service Schedules
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- Freight Estimation
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- Freight Payment and Audit Discrepancy Report
- Executing the Freight Payment and Audit Discrepancy Report

Deliveries

Overview of Deliveries

A delivery is a set of order lines to be shipped to a customer's ship to location. Multiple deliveries can be grouped into a single trip. A single delivery can have items from different sales orders and can also include backorders and regular orders.

A delivery leg is a segment between any two consecutive stops on the delivery itinerary.

There are two main pages within the Deliveries tab. Each page enables you to perform various tasks, including the following:

- Workbench page:
  - Search for deliveries: , page 2- 3 You can use the Simple or Advanced Search
  - Manage itinerary: , page 2- 5 You manage the delivery leg itinerary, which includes: canceling a service, assigning a delivery to a trip, editing a delivery, deleting a delivery, rating a delivery, splitting a delivery, creating a new delivery, selecting a service for a delivery, and tendering a delivery leg

Note: The initial view of the Delivery Workbench does not display Manage Itinerary. You enable this icon by using personalization, which is a standard customization technique used in all web-based Oracle Applications.

- Select service: , page 2- 5 You can select a service for a delivery (for single-leg delivery only)
- Tender: , page 2-17You can tender a delivery (for single-leg delivery only)
- Update: , page 2- 5 You can update a delivery

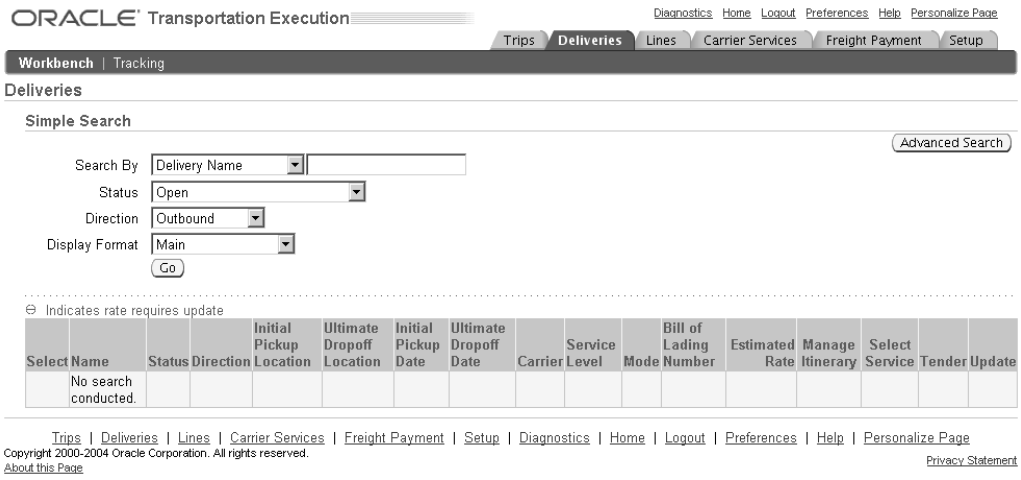
- Tracking page:
  - Tracking History: , page 2-21You can view the tracking history of a delivery
  - Track Online: , page 2-21You can track a delivery online

Searching for Deliveries

To find a delivery using Simple Search:

1. Navigate to the Delivery Workbench page.

Delivery Workbench - Simple Search Page



2. Select the Search By criteria and enter specific search data.

   You can search by:

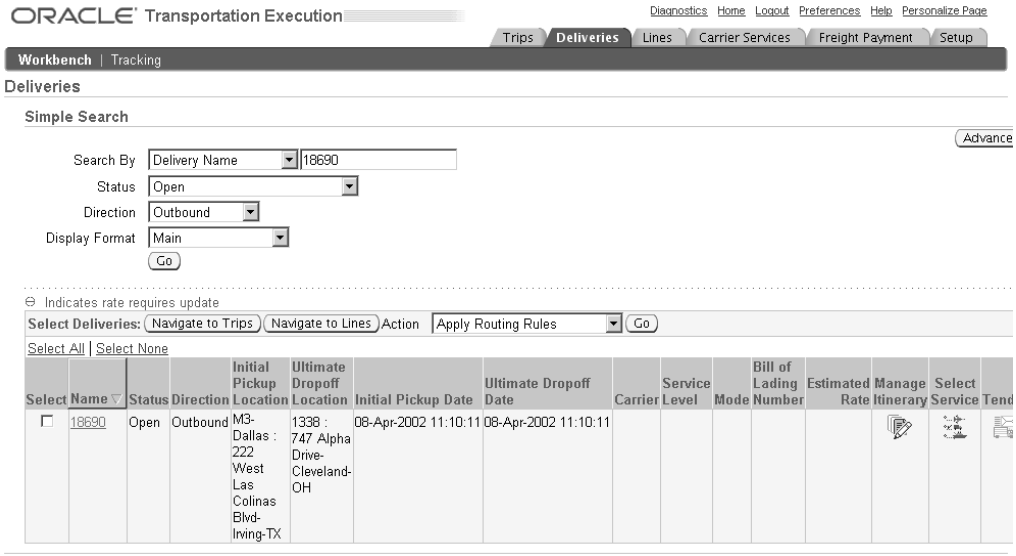
   - Delivery Name
   - Bill of Lading Number
   - Order Number
   - Trip Name

3. Choose the Status of the delivery.
4. Choose Outbound as the Direction of the shipment.

5. Choose the Display Format.
6. Click Go.

   The results of your search are displayed within a table at the bottom of the Deliveries Workbench page.

The Delivery Workbench Page With Results



To find a delivery using Advanced Search:

1. Navigate to the Delivery Workbench page.
2. Click Advanced Search.
3. Select either of the following:
   - Search results where each must contain all values entered: This search method will return only those deliveries that have the exact values that you specify
   - Search results where each may contain any value entered: This search method will return any delivery that has any of the values that you specify.
4. Choose Name is, contains, starts with, or ends with.
5. Enter the Name criteria.

   If you selected Name is, then you must enter the exact name you are searching for. If you selected Name contains, then you need only enter a portion of the delivery name. If you selected Name starts with or Name ends with, then you need only enter the beginning of the delivery name or the end of the delivery name.
6. Select Status is.

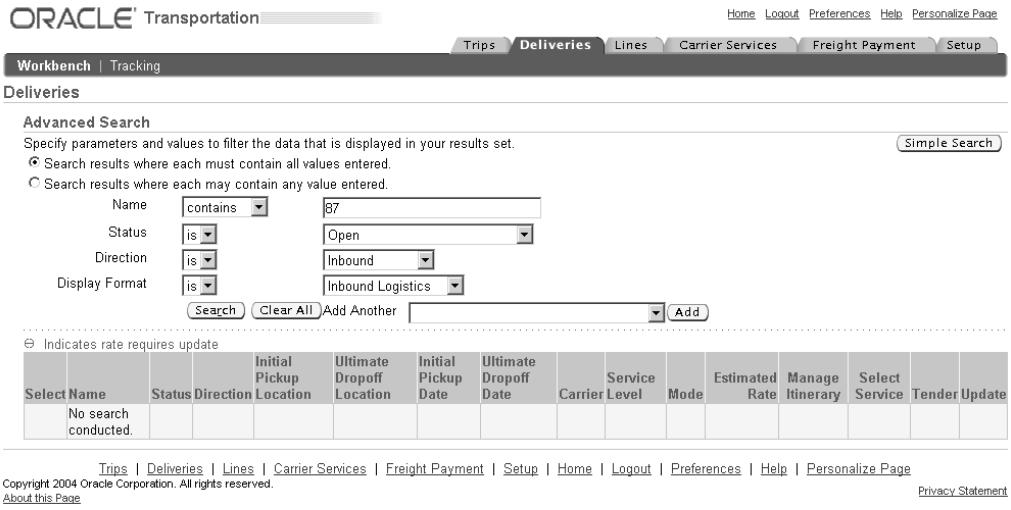
   Note: You do not have to select "is" for the Status. You can leave the field blank if you do not know the status of the delivery.

7. Choose the Status.
8. Select Direction is.

Note: You do not have to select "is" for the Direction. You can leave the field blank if you do not know the direction of the delivery.

9. Choose the Direction.
10. Select Display Format is.
11. Choose the Display Format.

Deliveries Workbench - Advanced Search Page



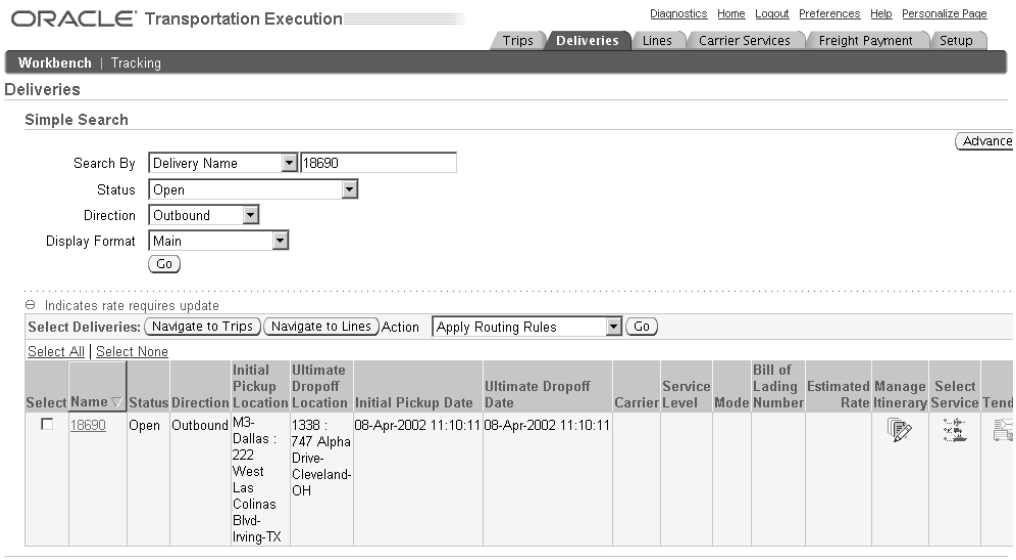
12. Optionally, you can add additional criteria to your search by selecting it from the list of values in the Add Another field and clicking Add.
13. Click Search.

Viewing and Updating Deliveries

To view and update a delivery:

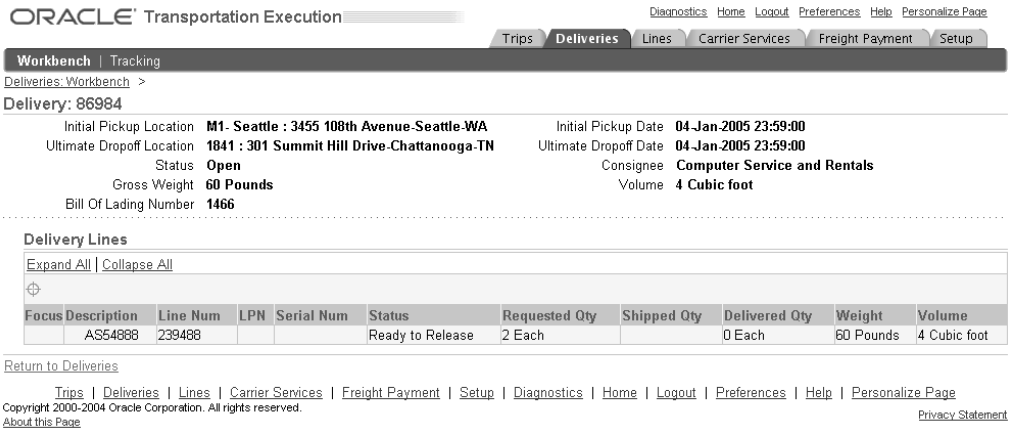
1. Navigate to the Delivery Workbench page.
2. Find your delivery.

Deliveries Page



3. Click the delivery Name to view the delivery details.

Delivery Summary and Details Page



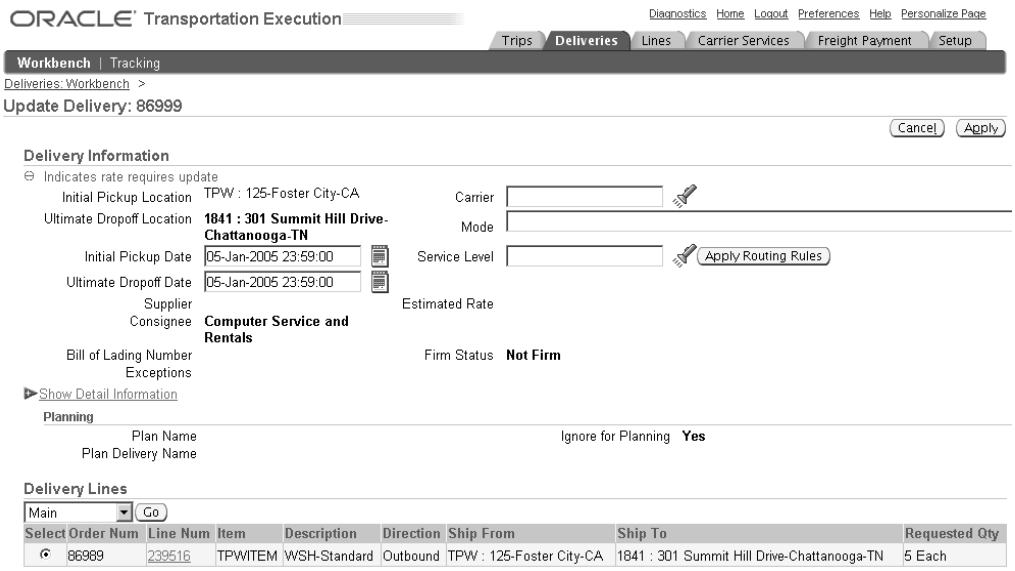
4. Click Return to Deliveries when you have finished reviewing your delivery.

   If the delivery is packed, you can view its packing configuration by expanding and collapsing containers.

5. From the Deliveries Workbench, click the Update icon for your delivery.

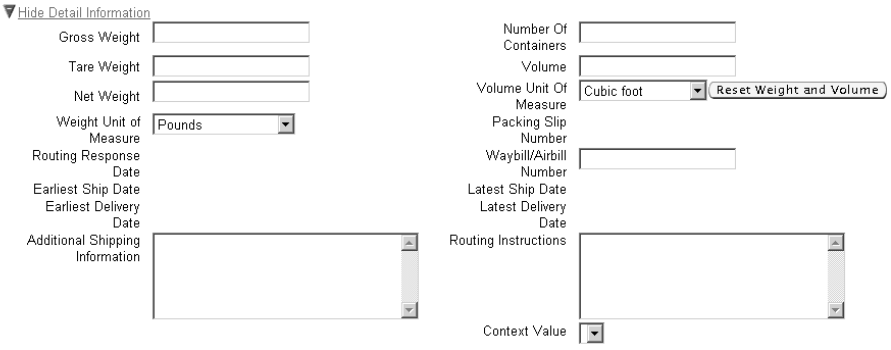
> **Note:** On the Delivery Workbench, you can select a set of deliveries and jump directly to the lines that are contained in those deliveries, or to the trips that those deliveries belong to by clicking either Navigate to Lines or Navigate to Trips.

Update Delivery Page - Delivery Information Region



6. Update the following as needed:
   - Initial Pickup Date
   - Ultimate Dropoff Date
   - Carrier
   - Mode
   - Service Level
7. Click Apply Routing Rules to use routing rules with this delivery.
8. Click Show Detail Information to display the details of the delivery.

Update Delivery Page - Delivery Details



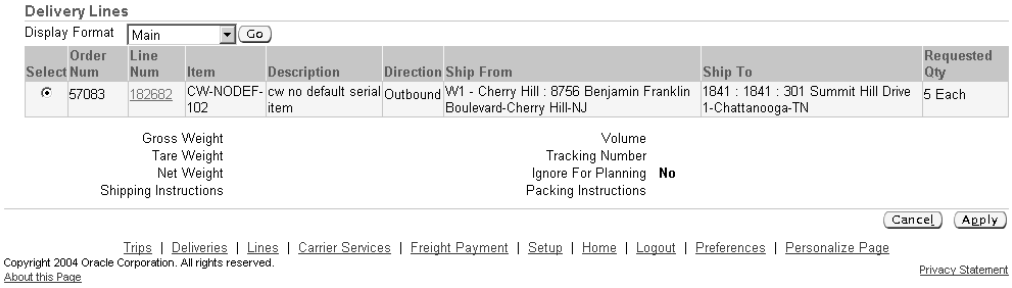
9. Update the following fields as needed:
   - Gross Weight
   - Tare Weight
   - Net Weight

- Weight Unit Of Measure
- Additional Shipping Information
- Number of Containers
- Volume
- Volume Unit Of Measure
- Waybill/Airbill Number
- Routing Instructions

10. View the Delivery Lines for your delivery.

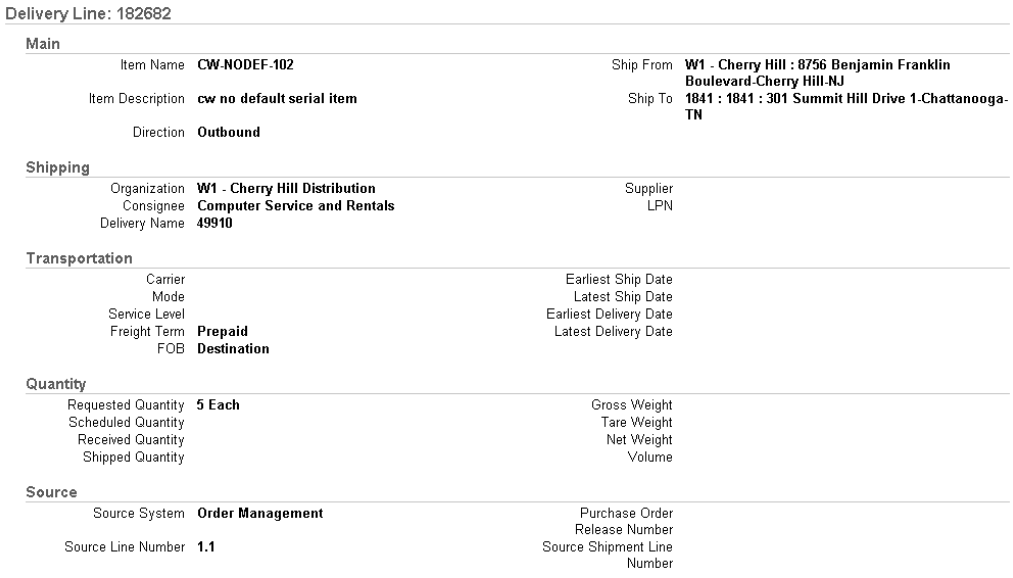
    Clicking on a delivery line will cause its detailed information to be displayed at the bottom of the page.

Update Delivery Page - Delivery Lines Region



11. Click Apply.
12. Optionally, click on a Delivery Line to view the details of the particular line.

Delivery Line Page

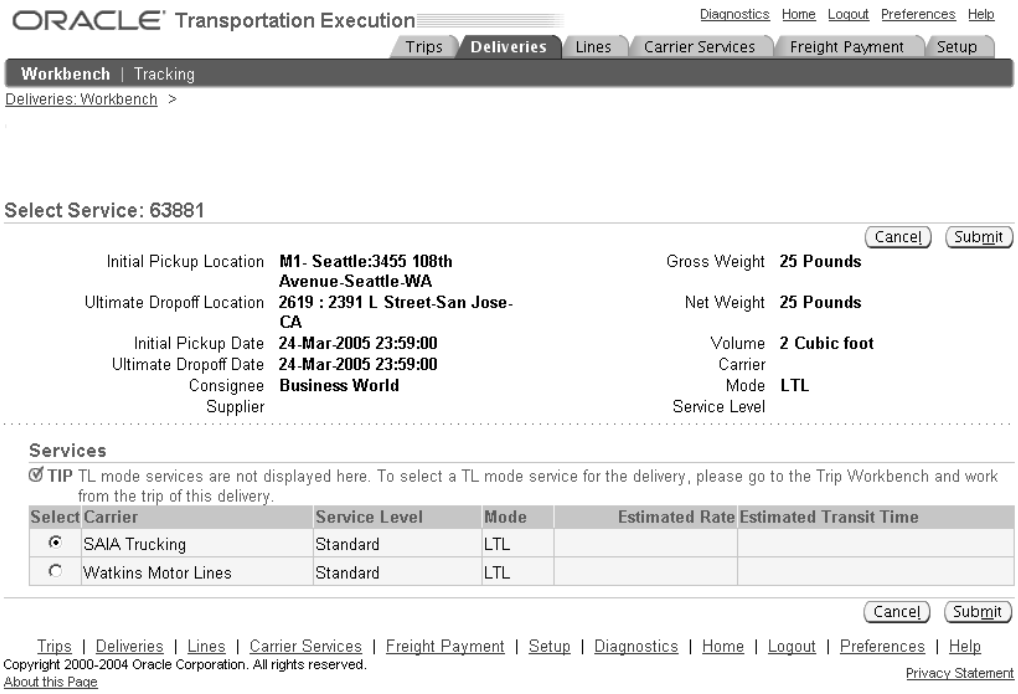


To select a service for your delivery:

1. Navigate to the Delivery Workbench page.
2. Find your delivery.
3. Click the Select Service icon.

   A list of services matching the delivery's pickup location, dropoff location, and carrier, mode, service level will be displayed.

Delivery Services Page



To invoke actions from the Delivery Workbench:

1. Navigate to the Delivery Workbench page.
2. Find your delivery.
3. Select one or more deliveries and select any of the following actions:
   - Apply Routing Rules: To apply a routing guide rule
   - Auto Create Trip: To auto create a trip with this delivery
   - Cancel Service: To remove a carrier, mode, or service level from a delivery
   - Close: To close the delivery
   - Firm Contents: To firm the contents of the delivery (lines cannot be assigned or unassigned)
   - Firm Routing and Contents: To firm the routing and contents (lines cannot be assigned or unassigned, nor can the itinerary (stops) of the trip(s) that the delivery is assigned to)
   - Generate Routing Response: Used for Inbound deliveries

- Ignore for Planning: To ignore this delivery for planning (if Oracle Transportation Planning is installed)
- Include for Planning: To include this delivery for planning (if Oracle Transportation Planning is installed)
- Rate: To rate the delivery after its weight and or volume has changed
- Reset Weight and Volume: To reset the weight and volume of a delivery
- Unfirm: To unfirm the delivery

Related Topics

Load Tendering, page 2-17

Cancelling a Service for a Delivery

To cancel a service for a delivery:

1. Navigate to the Delivery Workbench page.
2. Find your delivery.
3. Select a delivery that has a service assigned to it.
4. Select the action Cancel Service.

Viewing a Delivery Leg

To view a delivery leg:

1. Navigate to the Delivery Workbench page.
2. Find your delivery.
3. Select your delivery, and click the Manage Itinerary icon. (Manage Itinerary icon is not shown in the seeded view. To enable it, you will need to use personalization.)
4. To view, update, cancel, delete, rate, or split the delivery leg, select the following:
   - Assign to Trip: To assign the delivery leg to a trip
   - Cancel Service: To cancel the current service, carrier, mode, and service level for the delivery leg
   - Delete: To delete the delivery leg
   - Rate: To update the rate of the delivery leg
   - Split: To split the delivery leg into two legs
   - Update: To update the delivery leg
   - Create: To create a new delivery leg
5. Click Select Service to select the service for your delivery leg.
6. Click Apply and return to the Delivery Workbench page.

Creating a Delivery Leg

To create a delivery leg:

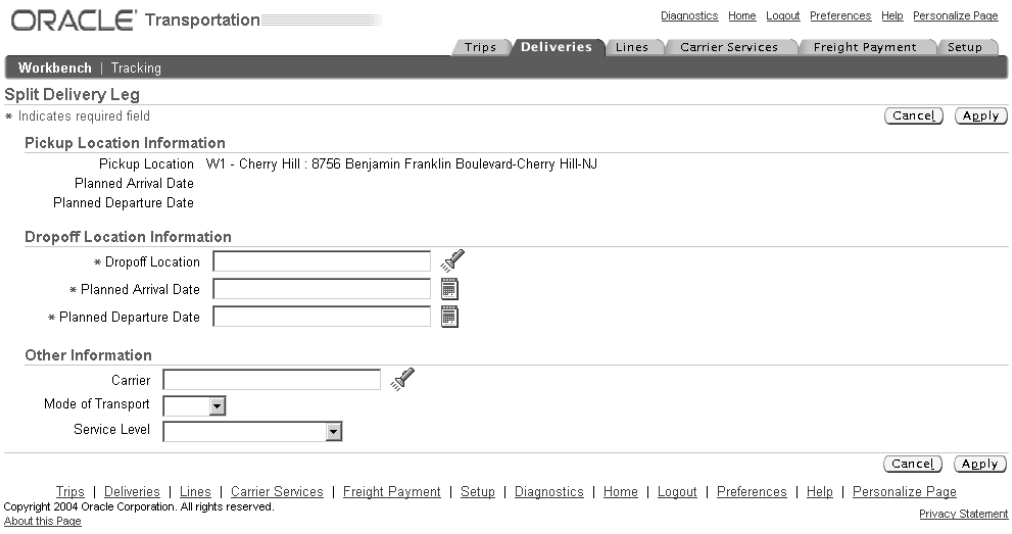
1. Navigate to the Delivery Workbench page.
2. Find your delivery.
3. Select your delivery and click Manage Itinerary.
4. To create a new delivery leg, click Create.
5. From the list of values, select a Pickup Location.
6. Select a Planned Arrival Date and a Planned Departure Date.
7. From the list of values, select a Dropoff Location.
8. Select a Planned Arrival Date and a Planned Departure Date.
9. Optionally, select a Carrier, Mode of Transport, and Service Level.
10. Click Apply.

Splitting a Delivery Leg into Segments

To split a delivery leg into segments:

1. Navigate to the Delivery Workbench page.
2. Find your delivery.
3. Select the delivery and click Manage Itinerary.
4. Select the delivery leg and click Split.

Split Delivery Leg Page



5. From the list of values, select a Dropoff Location.
6. Select a Planned Arrival Date and Planned Departure Date.

7. Optionally, enter a Carrier, Mode of Transport, and Service Level.
8. Click Save.

To update a delivery leg:

1. Navigate to the Delivery Workbench page.
2. Find your delivery.
3. Click Update.
4. Update the leg as needed.

Delivery Distance and Transit Times

Oracle Transportation Execution enables you to work with third-party mileage calculation software companies to calculate distances and transit times between facilities.

A template is created through Oracle Transportation Execution that includes origin and destination zip codes, cities, states, or countries. After you have defined the necessary information, you download the template (creating the template), then upload the template to a database table. Oracle Transportation Execution and Oracle Transportation Planning then use the information from the table with the use of a third-party mileage calculation software to calculate the distance and transit time from one facility (zip code, city, state, country) to another. This information can then be used for calculating mileage costs for each trip.

The following table depicts one format that can be produced through the use of the template within Oracle Transportation Execution:

Origin Zip Code	Destination Zip Code	Transit Miles	Transit Time (hour: min)
52401	51101	324.4	5:05
52401	51556	259.7	4:05
52401	51301	240.9	4:33
50501	52240	201.4	3:17

The delivery distance and transit times are defined within the Setup tab of Oracle Transportation Execution.

Related Topics

Oracle Transportation Execution Implementation Manual

Freight Rating

Freight rating is the process of assigning carrier rates to a delivery or trip based on distance, weight, volume, commodity shipped, time, or a flat fee. The calculation methods vary depending on the carrier, service level, and mode of transport.

Overview of Freight Rating

Oracle Transportation Execution enables you to apply carrier freight rates to deliveries and trips. You can search for carriers, select the carrier service for your delivery requirements, calculate a freight estimate, and apply the estimate to the trip or delivery. You can also reduce freight rates by consolidating multiple deliveries in a single trip. Consolidation enables multiple deliveries to be aggregated and rated as a single trip. Freight estimates are based on actual carrier rates, enabling you to accurately estimate carrier freight costs. Freight rates calculated in Oracle Transportation Execution can be used by Oracle Order Management to apply freight charges to a customer invoice.

The base rates for freight rating are:

- Distance based: Loaded and unloaded between origin to destination, zone based
- Unit based, including:
  - Container: Number of pieces
  - Weight: Delivery or individual containers in a delivery
  - Volume: Dimensions of a delivery or individual containers
  - Pallet: Number of pallets
- Time based: Based on the unit time for the freight carried
- Flat fee: Based on a flat rate ($x) per load

Parcel Freight Rating

Parcel freight rating is the process of applying rates to individual containers. These rates are based on the weight of each container in a delivery and are determined by service levels such as overnight delivery, second day delivery, and ground delivery. Parcel freight rates are also based on origin and destination zip code zones. Parcel hundredweight or multi-piece rates can also be modeled, allowing application of rates based on the entire delivery weight.

LTL Freight Rating

LTL freight rating is the process of applying rates based on the entire weight of the delivery. It is based on hundred weight (rate per 100 pounds). The freight rates are determined by origin, destination, freight class / commodity, and weight. Freight classes are used to group commodities with similar characteristics for the purposes of freight rating.

TL Freight Rating

Oracle Transportation Execution provides the flexibility to establish truckload freight rates based on geographical information, carrier service levels, and vehicle type. Truckload rating can be a combination of distance based, time based, unit based, and/or flat rates. The distance calculation methods used are the full route distance method, or the shortest direct route distance method. To support distance and time-based rates, Oracle Transportation Execution provides the ability to download, update, and upload origin and destination mileage templates. Open interfaces are also available to retrieve distance and intransit times with third party software packages.

Importance of Freight Rating

- To apply carrier rates to a delivery
- To select carrier services based on freight rates

- To provide higher level of accuracy while estimating freight rates
- To apply carrier discounts and charges to a delivery

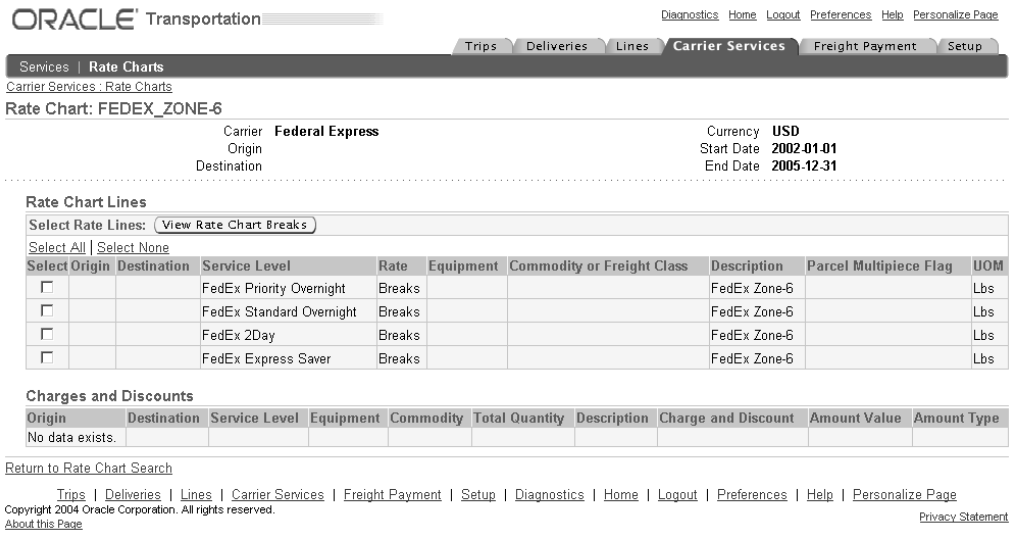
Carrier Rate Comparisons

Using Oracle Transportation Execution, you can compare carriers based on freight rates and service offerings. Multiple carriers can provide service on a single origin and destination and you can easily compare carriers and service levels, and select the carrier that best suits your delivery requirements.

Carrier Rate Chart Viewer

Using Oracle Transportation Execution, you can view carrier rates. The rate chart viewer displays the details of a carrier rate chart including freight rates, effective dates, weight breaks, freight classes, origin/destination, and so on.

Rate Chart Viewer Page



Charges and Discounts

Charges are additional fees accessed by a carrier for services such as handling, staging, documentation, labeling, and other activities. Charges and discounts can be established in Oracle Transportation Execution based on:

- Percent: the percent amount of the discount or charge
- Rate per UOM: discount or charge per UOM
- Fixed Rate: the fixed rate of discount, or charge regardless of the quantity

Carriers generally provide discounts or incentives on the published rates indicated on carrier rate charts.

Automated Rating and Routing

Oracle Transportation Execution can be configured to automatically rate and route your deliveries at ship confirmation, delivery creation, or delivery consolidation. Automated rating and routing uses existing routing guide rules to determine the carrier, mode, and service level. The rate that is generated is automatically applied to the delivery.

Automated rating and routing is setup within the Shipping Parameters window, under the Transportation tab. You determine when routing guide rules are assigned to deliveries and when to auto calculate the freight rate within this window. Further, within the Global Shipping Parameters window, under the Transportation tab, you can define the specific freight term to rate inbound deliveries (if inbound logistics is used), the freight term to not rate, and the freight term to rate drop shipped deliveries with.

Oracle Advanced Pricing Integration

Oracle Transportation Execution provides a robust freight-rating engine through integration with Oracle Advanced Pricing. This integration provides the flexibility to setup various transportation rate structures.

Oracle Order Management Integration

Oracle Order Management users can streamline the order entry process and improve customer service by communicating available freight options to customers. Order entry users can view all eligible freight options including freight estimates, carrier, mode of transport, service level and transit time. See: *Oracle Order Management User's Guide*.

Related Topics

Oracle Transportation Execution Implementation Manual

Accessorial Charges

Accessorial charges are fees for additional services in addition to the main transportation service. Accessorial charges can be optional or mandatory, depending on your business needs. Optional charges, such as Assisted Loading charges, are based on those facilities requiring assisted loading. Mandatory accessorial charges are charges such as a fuel surcharge that are applied by the carrier to all shipments. When defining a shipment or a shipment detail, or requesting a rate estimate, shippers are able to indicate whether any of these services apply, and will provide detailed information about the service. Carriers are able to define accessorial charges based on these services. When calculating a rate, all the accessorial charges that apply for the chosen carrier, commodity, and equipment will be considered.

The following are accessorial charges within Oracle Transportation Execution:

- Stop off charges: Charges that are applied for stops that exceed the planned number of free stops in a trip
- Loading charges: Charges that are applied when the facility requests additional people from the carrier, to help load a shipment
- Assisted loading charges: Charges that are applied when the facility determines that additional staff is needed to load a shipment, based on size, shape, or weight
- Out of route charges: This charge is applied if a shipments distance is longer than expected
- Weekday/Weekend layover charges: Applied when a driver is not working and away from their home terminal before being sent to another destination
- Unloading charges: Charges that are applied when a facility requests additional carrier employees to assist in unloading a shipment

- Assisted unloading charges: Charges that are applied when the facility determines that additional staff is needed to unload a shipment, based on size, shape, or weight
- Handling charges: This charge can be applied whenever handling of a shipment is beyond the standard loading and unloading requirements, for example breaking a pallet
- Origin surcharge for designated regions or zones: Applied to shipments that originate from a specific location
- Destination surcharge for designated regions or zones: Applied to shipments that have a destination to a specific location
- Fuel surcharge: An additional charge accessed by the carrier based on a percentage of the line haul charge

Related Topics

Oracle Transportation Planning User's Guide

Oracle Transportation Execution Implementation Manual

Continuous Move Rating

Continuous move rating is based on a sequence of loads on a single truck. Carriers often give preferential pricing to continuous moves, relative to the sum of the individual loads making up the move. The combination of moves helps carriers to address geographical equipment imbalances and the massed business volume helps the carrier to increase resource utilization. The pricing advantages often reach significant enough levels to justify the inclusion of empty movements between loaded legs, as part of the continuous move-building process.

Rating Flow

The freight rating process begins by searching for a delivery (or trip) and selecting a service. You can also perform the following actions:

- Cancel service: to cancel a carrier service from a delivery.
- Update rate: to update the estimated rate on a delivery.

Carrier services are searched using an origin, and a destination address. The origin, and the destination of a service are matched with the Initial Pickup Location and the Ultimate Drop off Location of a delivery.

Selecting a mode, for example parcel, will return those carriers designated as parcel. This will allow rate comparisons between carriers based on mode of transport.

> **Note:** Rates for services and carriers have to be set up before a delivery can be rated.

Selecting a Service for a Delivery

To select a service for a delivery:

1. Navigate to the Delivery Workbench page.

2. Find your delivery.
3. Select the delivery and click the Select Service icon to view the available services that match the delivery.
4. Select one of the available services.
5. Click Submit.

   A Confirmation message is displayed.

Updating Carrier Freight Rates For a Delivery

If an estimated rate on a delivery requires an update, then the delivery message Indicates Rate Requires Update. Adding or deleting items from the delivery or change in the packing configuration can result in the delivery being marked for an update.

Re-rating can be initiated for a delivery or trip with an existing rate even if the reprice flag is setup as no, since some other legs on the same trip may have changed and may cause a change in rate.

To update rates for a delivery:

1. Navigate to the Delivery Workbench page.
2. Find your delivery.
3. Select a delivery and select the action Rate.

Load Tendering

Overview of Load Tendering

A load tender request is a shipment pick up request sent by a shipper to a carrier. In the load tendering process, you can tender a single delivery, multi-leg deliveries, or a trip consisting of multiple deliveries.

Load tendering involves transmitting a load tender request to a carrier and enabling a carrier to respond to the request by accepting or rejecting the request. The load tender request includes the characteristics of a delivery, such as origin and destination address, delivery weight, delivery volume, pickup delivery date and time requirements. The load tender request allows the carrier to view detailed pickup and delivery information.

Load tendering involves sending a workflow message to a carrier via e-mail. The carrier can logon to the carrier portal and respond to the tender request. Load tendering is primarily used in the less than truckload (LTL), full truckload (TL), and marine modes of transport. In the small parcel segment, carrier manifesting is equivalent to tendering. Since large number of deliveries are processed in the small parcel environment, it is not effective to tender each delivery to a carrier.

The load tendering functionality provided in Oracle Transportation Execution is implemented using Oracle Workflow.

> **Note:** When tendering an inbound delivery, the carrier site that is associated with the delivery's organization is used.

Note: Tendering, in Oracle Transportation Execution, can be triggered upon release from Oracle Transportation Planning.

Electronic Load Tendering

Electronic load tendering provides the following features:

- A platform for carriers and shippers to electronically communicate
- Carrier Response Portal enables carriers to respond by accepting or rejecting a load tender request
- Improves the speed of transactions between shippers and carriers
- Eliminates manual processes used to tender loads to carriers

Tendering Flow

You can perform the following procedures in the tendering flow:

- Submit a tender
- Receive a tender
- Cancel a tender

Submitting a Tender

To submit a tender:

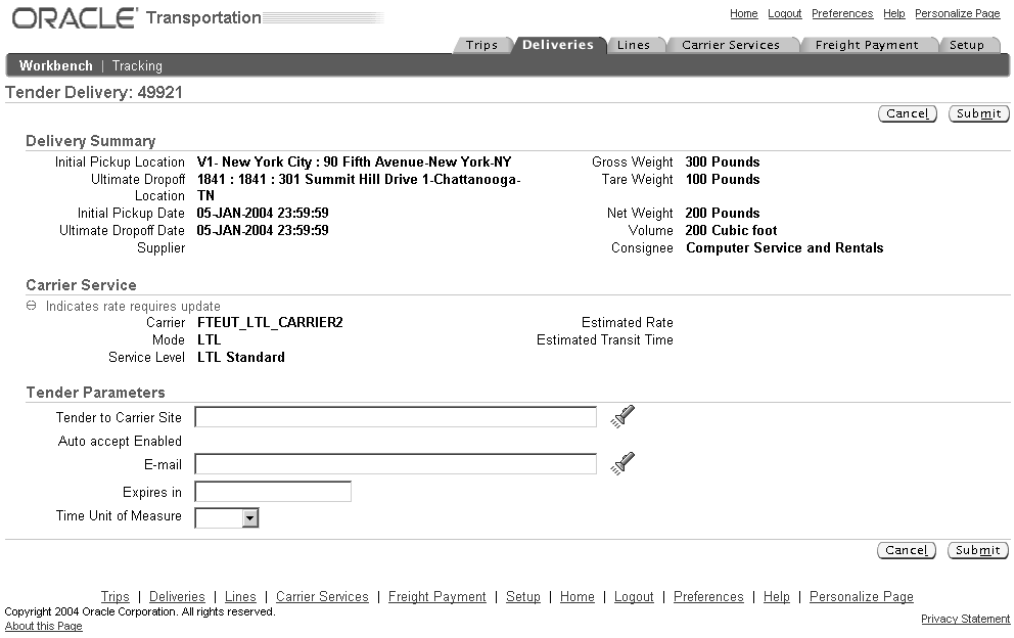
1. Navigate to the Delivery Workbench page. (You can also submit a tender from the Trips Workbench page.)
2. Find your delivery.
3. Click the Tender icon.

   Note: A delivery or trip is eligible for tendering if the following two conditions are met:

   Service selection is already done for the delivery or trip.

   The carrier component of the service assigned is tender enabled.

Tender Delivery Page



4. Select the Tender to Carrier Site or verify that the Tender Carrier Site is correct.
5. Select the E-mail or verify that the E-mail is correct.
6. Click Submit.

> **Note:** If a delivery line has been added to a tendered trip and during pick/ship the delivery line is backordered, then a cancel tender notification is sent to the carrier and will be un-assigned from the trip.

> **Note:** If a tender is canceled for any reason, then the same delivery/trip is tendered again, the tender ID will be the same as the original tender. If a new tender ID is required, then you must assign your delivery to a new trip.

> **Note:** The concurrent program Workflow Background Process must be run in order for timed out activities to be picked up from the queue and processed.

Receiving a Tender

Your carrier receives and responds to tenders through the use of the Carrier Response Portal. The carrier whose email was entered in the Load tender email field, navigates to the Carrier Response Portal site to receive and respond to tenders using a carrier specific user name and password. The carrier can also respond to tenders by email. The notification that is sent to the carrier is in HTML format. The body of the notification has all of the shipment details and two buttons: Accept and Reject. The carrier can clicks the appropriate response button, generating a response email. Oracle Workflow can read this response email and update the tender status accordingly.

Related Topics

Receiving and Responding to Load Tenders , page 4- 1

Cancelling a Tender

To cancel a tender:

1. Navigate to the Delivery Workbench page. (You can also cancel a tender from the Trips Workbench page.)
2. Find your delivery.
3. When a tender has been submitted, the tender icon for that delivery has an X through it. Click the tender icon.
4. Click Yes on the confirmation page to cancel the tender.

> **Note:** The Master Bill of Lading (MBOL) is generated at the trip level while tendering for TL. Re-tendering will not override the MBOL.

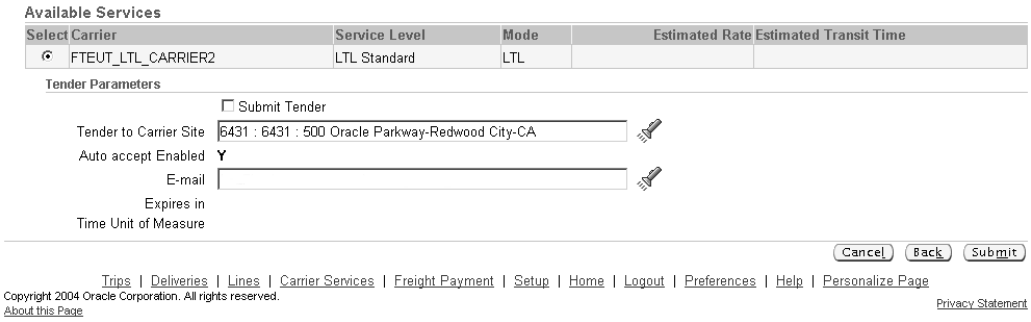
You can also tender a trip or delivery as part of the service selection process.

To tender a trip as part of the service selection process:

1. Navigate to the Trips page.
2. Find your trip.
3. Click the Select Service icon.
4. Within the Rating Parameters region, specify the Mode, Carrier, Service Level, and Vehicle Type.
5. Click Continue.

   The Available Services table displays the available services. If you select a service and the service belongs to a tender enabled carrier, the Tender Parameters section will display.

Available Services with Tender Available Page



6. Select Submit Tender.
7. Enter the Tender to Carrier site address.
8. Enter the E-mail.

9. Click Submit.

Delivery Tracking

Overview of Delivery Tracking

Delivery tracking is the process by which you receive information from a carrier on the location of a delivery. A carrier provides continuous feedback at regular intervals on the status of a delivery, and provides proof of delivery (POD) after a shipment has been delivered. Tracking information includes data related to a delivery pickup, in transit events, delivery exceptions, and the delivery receipt information. A standard carrier tracking message can include the following:

- Pickup location
- Delivery location
- Date and time of delivery pickup
- In transit events
- Delivery exceptions

The amount of delivery information included in a carrier tracking message depends on the level of tracking provided by the carrier. Some carriers may provide detailed tracking information that includes numerous in transit events. Some carriers may provide limited information such as pickup and delivery events only.

Delivery Tracking Methods

Oracle Transportation Execution provides the following methods of carrier tracking:

- Online tracking: enables you to directly access the carrier tracking web site to receive the tracking status on a delivery. You can access delivery information from any carrier that provides tracking information on its web site.You do not have to log on and log off of multiple carrier sites to obtain tracking information. Also, you do not have to enter a tracking or reference numbers while submitting an online tracking request. You can track deliveries using the carrier tracking pages in Oracle Transportation Execution. The online tracking feature is useful for shipping, transportation, and customer support personnel to access the current status of a delivery.
- XML based carrier tracking: enables you to accept inbound XML ShowShipStatus message from carriers. This is equivalent to the EDI 214 Shipment Status Message. The carrier response includes tracking information such as the current location of the delivery, status of the delivery, delivery exceptions, and the date the message was sent. The carrier can create an XML ShowShipStatus message, or an EDI 214 that is converted to the XML ShowShipStatus format, and is transmitted to Oracle Transportation Execution.
- Proof of Delivery: A Proof of delivery indicates the location, date and time of delivery, and the name of the individual receiving the delivery as well as the number of shipping units, weight and volume delivered. Any short or damaged quantities are also noted.Your carriers provide proof of delivery through the Oracle XML Gateway (EDI) or by entering the data manually through the carrier portal within Oracle Transportation Execution.

Delivery Tracking Message

Oracle Transportation Execution supports inbound tracking messages, asynchronously from a carrier, allowing you to view the current status of a delivery. A shipper and a carrier can establish the tracking requirements including notification events (exceptions only, or all messages), and the frequency of notification (hourly, daily, or an agreed upon time interval). The tracking message responses are automatically processed from the carrier, and the delivery status is automatically updated in Oracle Transportation Execution.

Viewing Delivery History

You can view the tracking history of all your deliveries. The tracking information is available in the inbound tracking message sent from the carrier. The tracking delivery history includes the carrier name, delivery status, activity date, activity type, and the sequence of the delivery. You can automatically receive delivery tracking information from a carrier.

View Tracking Exceptions

Delivery tracking exceptions can be viewed in Oracle Transportation Execution. Delivery exceptions refer to unplanned events that lead to in-transit delivery delays such as weather related delays, late drivers, damages, and others. Visibility to delivery exceptions enables you to adjust delivery plans in case of exceptions.

Tracking Flow

Use the Tracking page to search deliveries for tracking. You can search for deliveries by either the Delivery Name, Delivery Status, or by the Tracking Number. Tracking Number is a primary number used by a carrier to track a specific container or an entire delivery. If the Tracking Number belongs to a container, then, the delivery associated with the container appears in the search results.

Oracle Transportation Execution supports tracking information at the delivery level, and at the container level. The XML tracking information is displayed with the deliveries/containers. You can also track deliveries online, view the XML tracking history, and view delivery details.

If the tracking search results in a single container, then the delivery is expanded, allowing the container tracking details to be viewed. If a delivery consists of multiple containers, then, you have to click Expand All to view each container in the delivery.

Tracking a Delivery

To track a delivery:

1. Navigate to the Tracking page.
2. Search by any of the following:
   - Bill of Lading
   - Seal Identifier
   - Delivery Name
   - License Plate Number
   - Carrier Reference Number

- Waybill Number

3. Enter your search criteria.
4. Click Go.
5. Click the delivery number in the Delivery row to navigate to the Delivery Summary page.
6. Click the Track Online icon to navigate to the carrier's web site and view tracking information.

   Note: If the carrier's track online setup is not completed, then the track online icon is disabled.

7. Click the Additional Tracking Information.

   Note: If no XML messages are received for the delivery, then the tracking history icon is disabled.

8. Click View Message History to view all the messages received for the delivery.
9. Click Show, in the Details column, to show tracking details.
10. Click View Proof of Delivery to view the summary of the proof of delivery, if applicable.

Proof of Delivery

A Proof of delivery (POD) is produced upon the receipt of a delivery by a consignee and represents the document that a receiving clerk at the receiving dock signs to show what has been received. A proof of delivery indicates the location, date and time of delivery, and the name of the individual receiving the delivery as well as the number of shipping units, weight and volume delivered. Any short or damaged quantities are also noted.

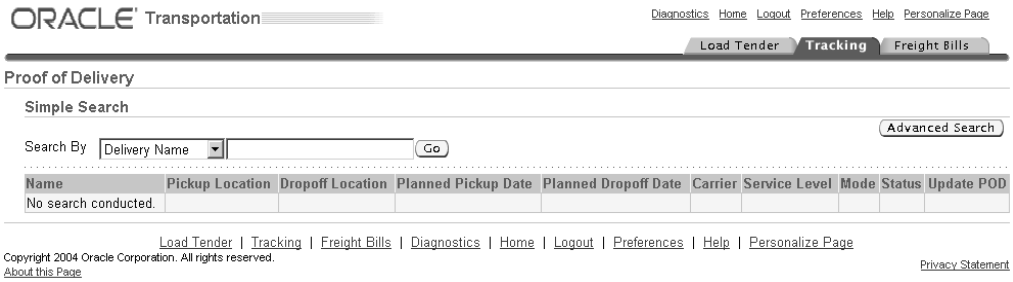
Your carriers provide proof of delivery through the Oracle XML Gateway (EDI) or by entering the data manually through the Carrier Portal within Oracle Transportation Execution. Once the information is received you can compare the shipped versus delivery quantities of the delivery, and run reports to track any discrepancies.

Finding Proof of Deliveries

To find an existing proof of delivery:

1. Navigate to the Proof of Delivery page.
2. Select one of the following from the Search By field:
   - Bill of Lading
   - Delivery Name
   - Tracking Number
   - Waybill Number
3. Enter your search criteria and click Go.

Proof of Delivery Page



Trips

Overview of Trips

A trip is a group of deliveries for a specific carrier, departing from a particular location. A trip contains at least two stops, a stop to pick up goods, and another stop to drop off goods, and may include intermediate stops.

Trips can be created automatically or manually.

Truckload rating is available to build and rate a full truckload and compare the rates with other carriers to find the best rate for your shipment.

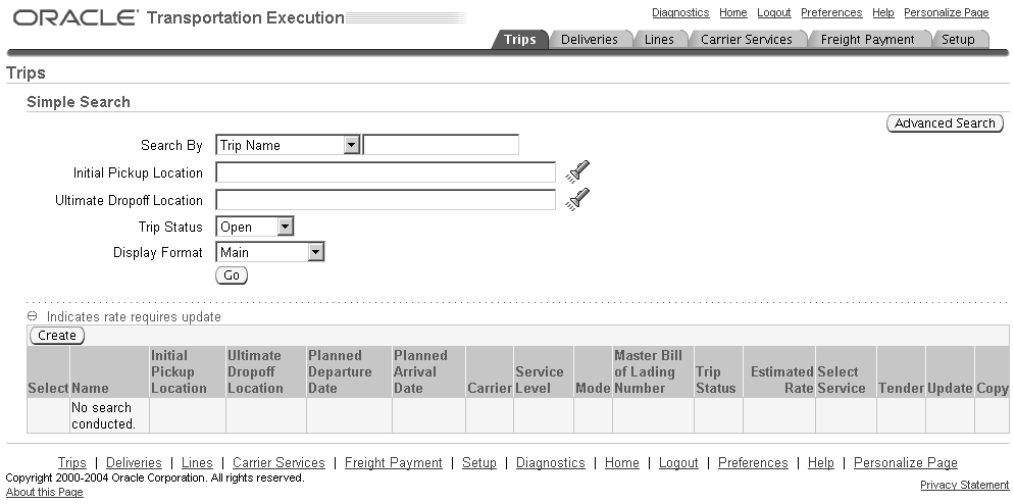
You cannot modify the first or the last stop in a trip, if a trip is in transit.

Searching For Trips

To find a trip using Simple Search:

1. Navigate to the Trips page.

Trips Page



2. Enter any, or a combination, of the following to find your trip:

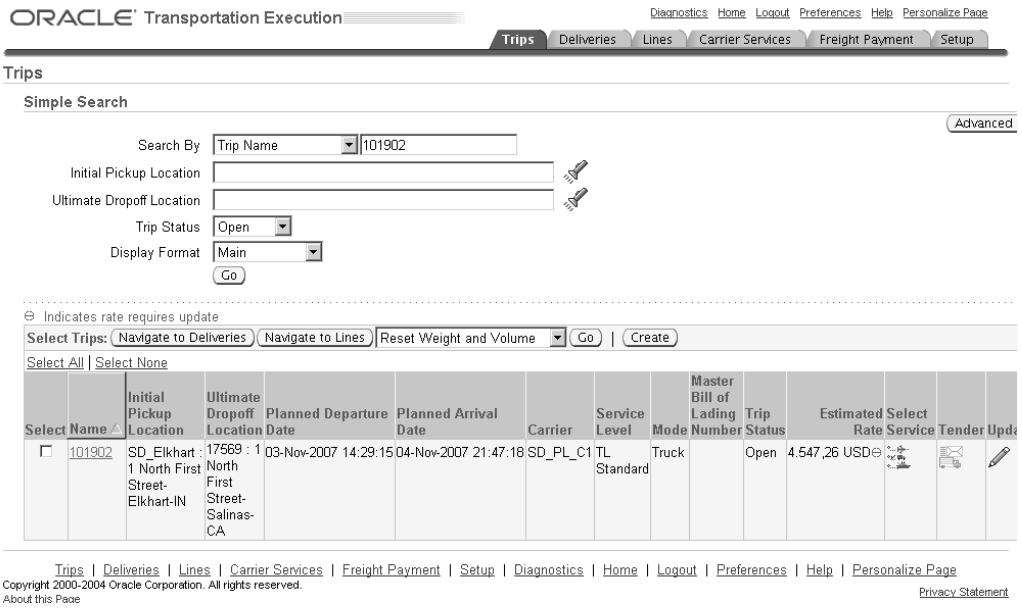
- Search By

  You can search by:

  - Trip Name
  - Order Number
  - Master Bill of Lading
  - Delivery Name
- Initial Pickup Location
- Ultimate Dropoff Location
- Trip Status: Closed, In-Transit, or Open

3. Select the Display Format for your returned results: Main, Miscellaneous, or Planning
4. Click Go.

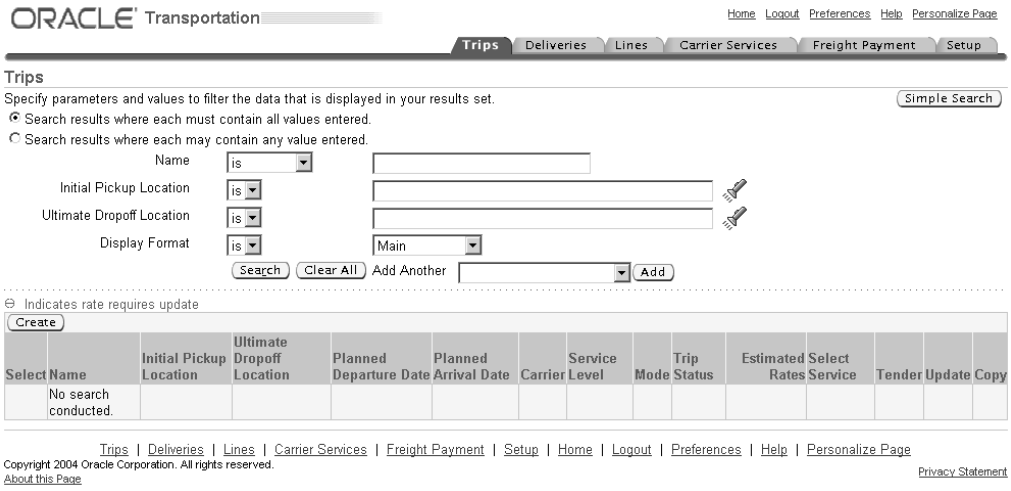
Trips Page with Search Results



To find a trip using Advanced Search:

1. Navigate to the Trips page.
2. Click Advanced Search.

Trips Advanced Search Page



3. Select either of the following:
   - Search results where each must contain all values entered: This search method will return only those trips that have the exact values that you specify
   - Search results where each may contain any value entered: This search method will return any trip that has any of the values that you specify.
4. Choose Name is, contains, starts with, or ends with.
5. Enter the Name criteria.

   If you selected Name is, then you must enter the exact name you are searching for. If you selected Name contains, then you need only enter a portion of the delivery name. If you selected Name starts with or Name ends with, then you need only enter the beginning of the trip name or the end of the trip name.
6. Select Initial Pickup Location is.

   Note: You do not have to select "is" for the Initial Pickup Location. You can leave the field blank if you do not know the initial pickup location of the trip.
7. Enter the Initial Pickup Location criteria.
8. Select Ultimate Dropoff Location is.

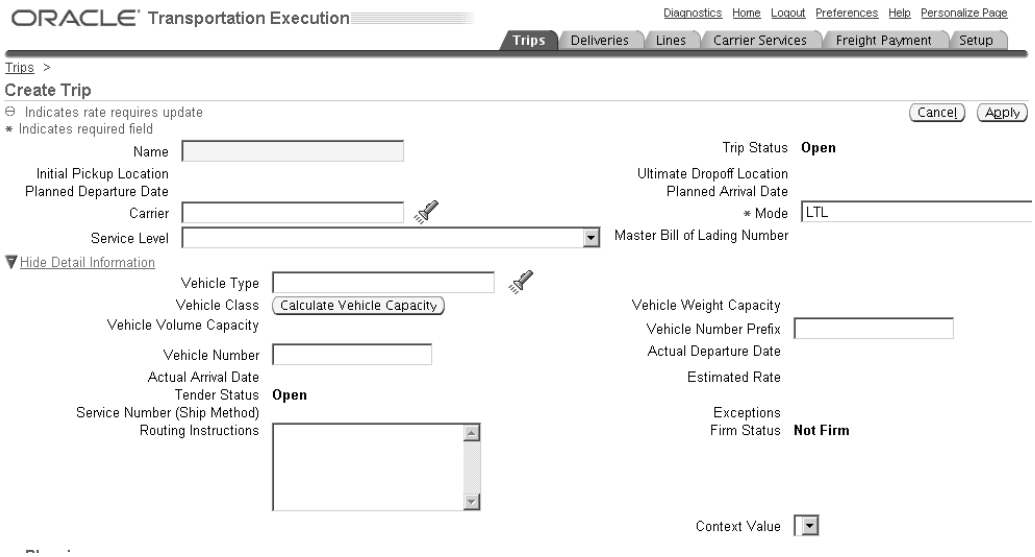
   Note: You do not have to select "is" for the Ultimate Dropoff Location. You can leave the field blank if you do not know the ultimate dropoff location of the trip.
9. Select Display Format is.
10. Enter the Display Format criteria.
11. Optionally, you can add additional criteria to your search by selecting it from the list of values in the Add Another field and clicking Add.
12. Click Search.

Creating a Trip

To create a trip:

1. Navigate to the Trips page.
2. Click Create.

The Create Trip Page

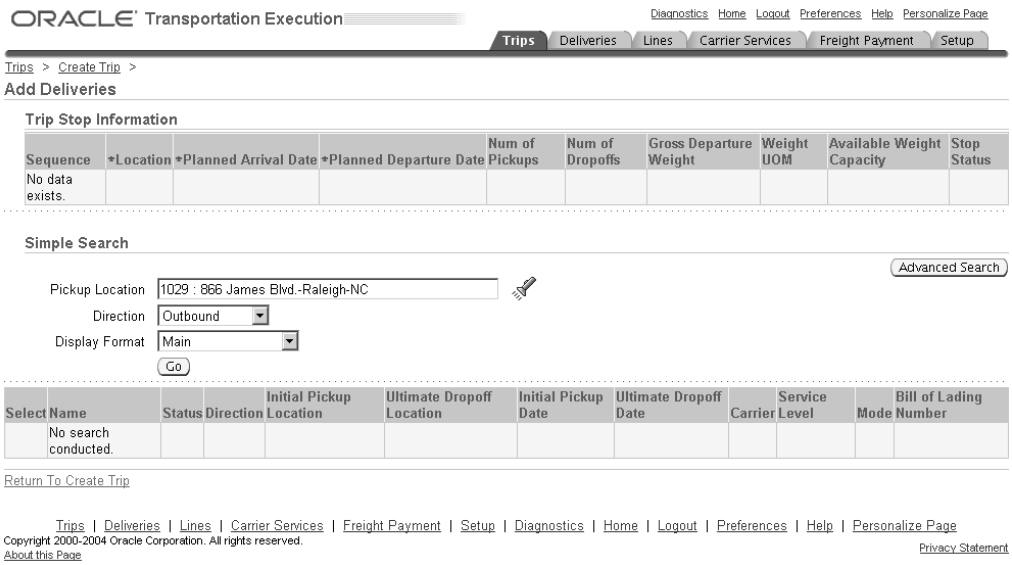


3. Enter a Trip Name.
4. In the Carrier field, use the list of values to select your Carrier.
5. Choose the Service Level.
6. Select the Mode for your trip.
7. Enter a Vehicle Type, Vehicle Number, Routing Instructions, and Vehicle Number Prefix.
8. Click Calculate Vehicle Capacity to calculate the capacity of the vehicle.
9. Click Hide Detail Information to view a more consolidated page for your trip.

Create Trip Page with Criteria

10. Click Add Deliveries.
11. Within the Add Deliveries page, use the list of values to find the Pickup Location for the delivery that you are searching for.
12. Select a Direction and a Display Format.
13. Click Go.
14. In the Vehicle section, enter or select an Organization, Item Name, Number Prefix, and Number.

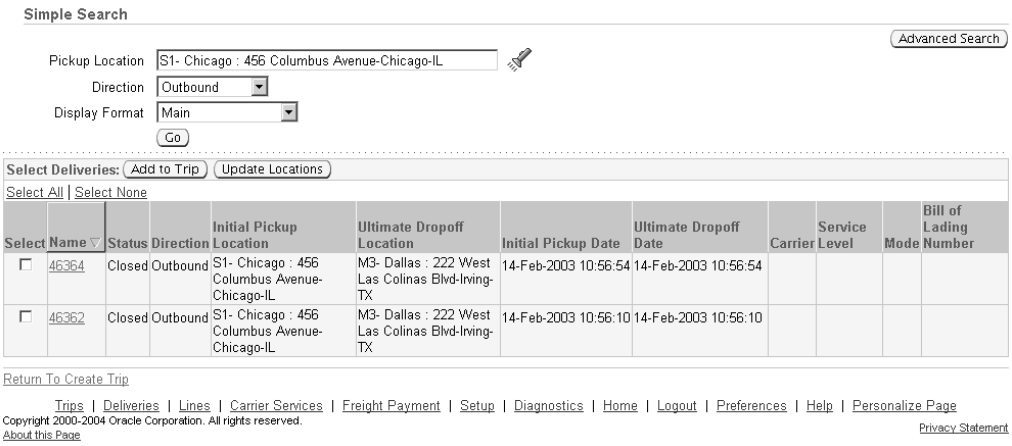
Add Deliveries Page



15. Click Go.

> **Note:** Use the Advanced Search to locate deliveries by Name, Partial Name, or Status.

Add Deliveries Page with Results



16. Click Update Locations to change the Pickup and Dropoff location of a delivery.
17. Select one or more deliveries that you want to add to the trip and click Add to Trip.

    New stops are created to correspond to the pickup and dropoff locations of the deliveries. For example, if there are two deliveries, D1 (going from A to B) and D2 (going from B to C), then three stops (A, B, and C) are created. If stops already exist on the trip, then the deliveries are added to those stops.

    Note: You can view the delivery details by clicking on the delivery Name.

18. Click Apply.

Related Topics

Load Tendering, page 2-17

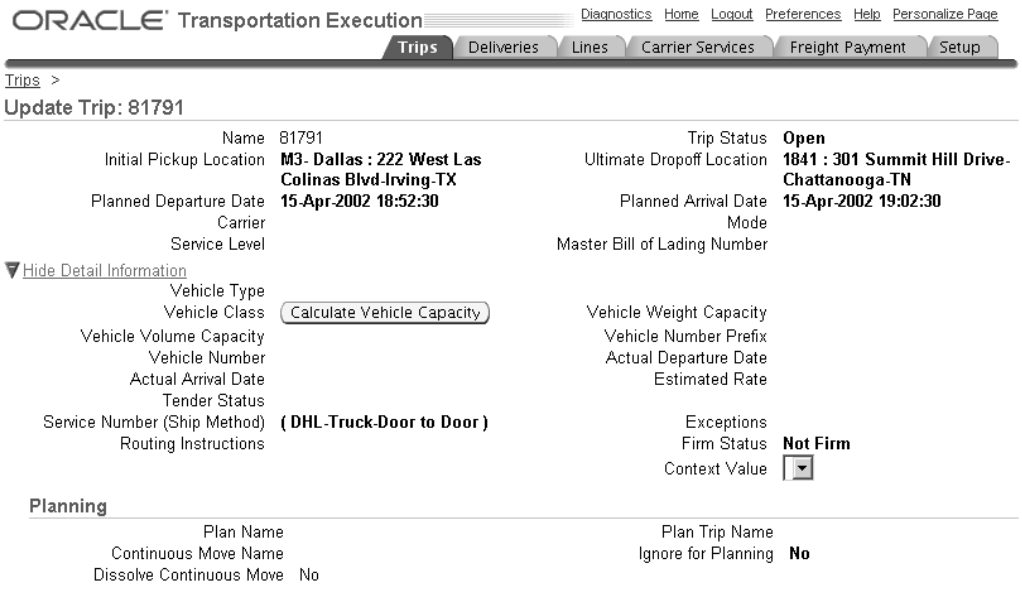
Updating a Trip

To update a trip:

1. Navigate to the Trips page.
2. Find your trip.
3. Click the Update icon.

    Note: Click Navigate to Deliveries or Navigate to Lines which will take you directly to the Deliveries or Lines page related to your trip.

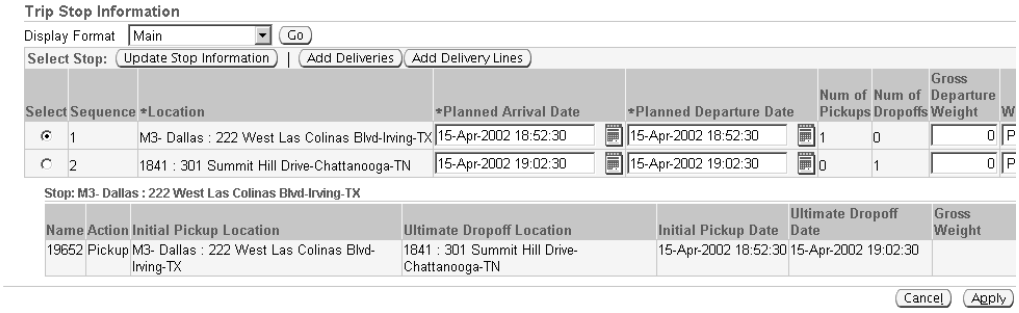
Update Trip Page



4. Update your trip Carrier, Service Level, and Mode as needed.

5. Update the Vehicle Type, Vehicle Number, Routing Instructions, and Vehicle Number Prefix as needed.
6. Click Calculate Vehicle Capacity to calculate the capacity of the vehicle.
7. Click Hide Detail Information to view a more consolidated page for your trip.

Update Trip Page - 2



8. Click Add Deliveries, Add Delivery Lines, and Update Stop Information as needed.
9. Click Details to view the details of the delivery.
10. Click the icon in the Remove column to remove a stop from the trip.
11. Click Apply.

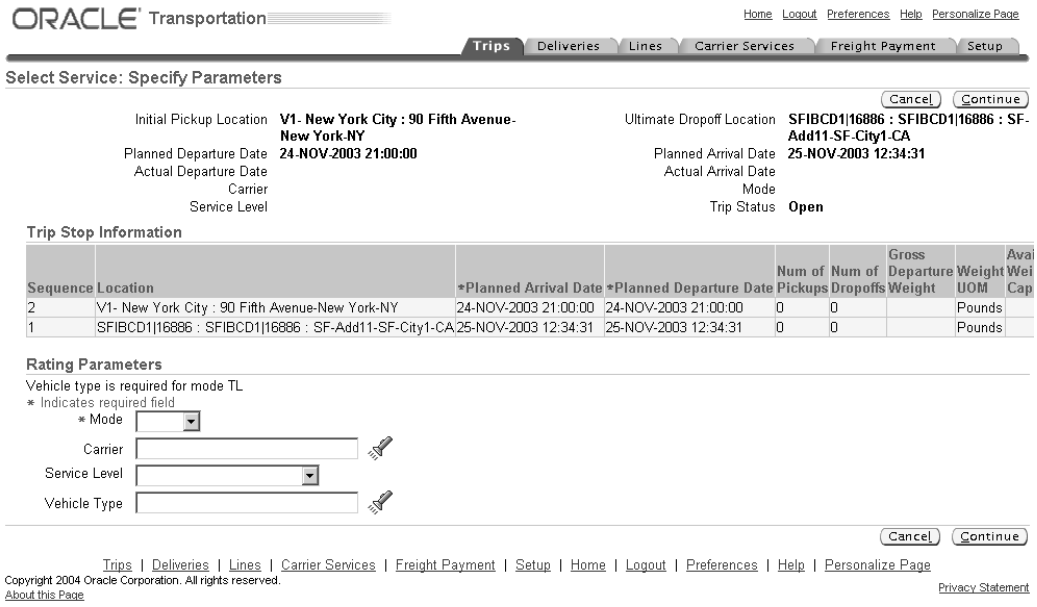
> **Note:** The following actions are available on the Trips page: Reset Weight and Volume, Cancel Service, Firm Routing, Firm Routing / Contents, Generate Routing Response, and Unfirm. You can execute actions one or many trips.

Truckload Rating

To build and rate a truckload shipment:

1. Navigate to the Trips page.
2. Find your trip.
3. Click the Select Service icon.

Select Service: Specify Parameters Page



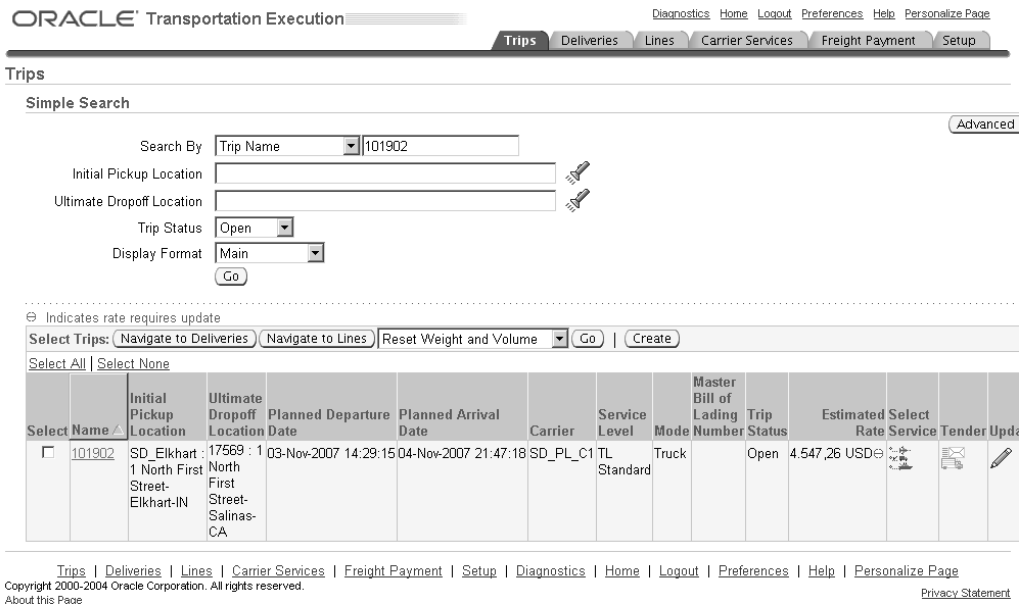
4. Within the Rating Parameters region, enter the following:
   - Mode: Select TL as the mode of transport
   - Carrier: Optionally, select a carrier from the list of values
   - Service Level: Optionally, select the service level
   - Vehicle Type: Select the vehicle type (you must select a vehicle type for TL rating)
5. Click Continue.
6. Compare the rates of the resulting carriers and pick the one that best suits your business needs.

Viewing a Stop in a Trip

To view a stop in a trip:

1. Navigate to the Trips page.
2. Find your trip.

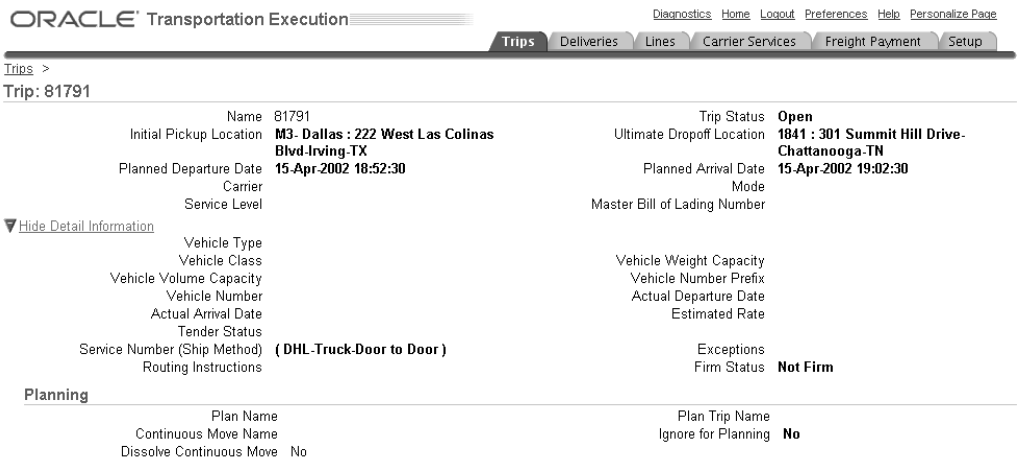
Trips Page



3. Click the trip Name to view the trip details.

   Note: You can copy a trip by clicking the icon in the Copy column and clicking Apply on the resulting page.

Trip with Stops Page



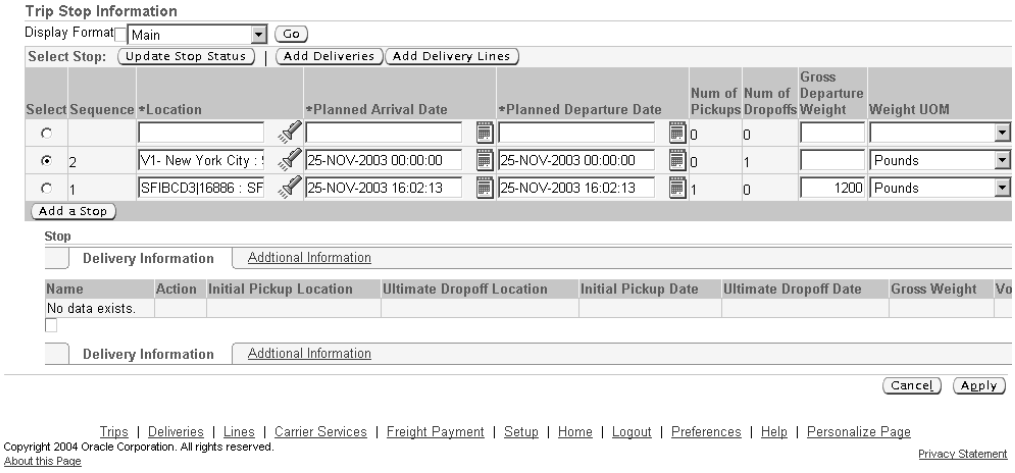
4. Click Hide Detail Information to view a more consolidated page for your trip.
5. If you want to change the table format for the results, select a Display Format of Main, Miscellaneous, or Planning, and click Go.

Creating a Stop for a Trip

To create a stop for a trip:

1. Navigate to the Trips page.
2. Find your trip.
3. Click the Update icon.
4. Click Add a Stop.

Trip Stop Information - Adding a Trip Stop



5. Enter the dropoff Location.
6. Select a Planned Arrival Date and Planned Departure Date.
7. Enter the Gross Departure Weight and Weight UOM.
8. Click Apply.

Carrier Services

Overview of Carrier Services

You setup carrier services in Oracle Transportation Execution. Carrier services are transportation services between an origin and a destination. The origin and destination can be a zip code, city, state, country, geographic region, or a zone. A service can be described as broadly as, between Japan and United States, or as narrowly as, between Taipei and zip code 94065. Service information is uploaded by a shipper.

The service details can include origin, destination, carrier, mode of transport, commodity, service level, equipment, schedules, and so on. You can use the service details to select the appropriate service based on the characteristics of your delivery, and to view the freight rates associated with a service.

Oracle Transportation Execution enables you to set up multiple carriers, and their corresponding services. After setting up carrier services, you can search and compare the services.

Carrier Selection

Carrier selection is the method of selecting a carrier that is best suited to transport a particular shipment based on freight costs, carrier availability, contractual commitments, and customer delivery expectations. Carrier selection focuses heavily on price minimization, but it also take into account such criteria as vehicle constraints, commodity constraints, and time windows.

Oracle Transportation Planning enhances Carrier Selection by introducing carrier commitments, which is only available if Oracle Transportation Planning is installed.

Least Cost Carrier Selection

Least cost carrier selection enables you to have Oracle Transportation Execution determine the ship method (carrier, mode, and service level) based on criteria that you setup in Oracle Shipping Execution. Least cost carrier selection selects the ship method that best suits the particular delivery, and assigns the freight costs to that particular delivery. If existing ship method exists on a delivery, then least cost carrier selection will respect that ship method. For example, if your delivery already specifies UPS, then least cost carrier selection will not consider ship methods with anyone except UPS.

Routing guide rules can be used to enhance the least cost carrier selection. For example, if you have a routing guide rule that specifies any shipment under 30 pounds must be shipped using the mode Parcel, the least cost carrier selection will respect the rule and only look at those carriers that are specified as Parcel.

Least cost carrier selection is enabled whenever a delivery is rated. This can be manually within the Shipping Transactions form using the Get Freight Costs action, manually within the Sales Order window using the Get Freight Rates or Get Ship Method and Freight Rate action, or automatically rated using the Auto Calculate Freight Rate option within the Shipping Parameters window, Transportation tab.

> **Note:** In order to use least cost carrier selection at order entry time, a generic carrier must first be defined and ship methods must be assigned to the generic carrier. See: Oracle Shipping Execution Setup chapter, Defining Carriers and Ship Methods, in the Oracle Order Management Implementation Manual.

Setting up least cost carrier selection is performed in the Shipping Parameters window and the Global Shipping Parameters window. See: *Oracle Transportation Execution Implementation Manual.*

Carrier Commitments

Carrier commitments are defined within Oracle Transportation Execution, but are only used with Oracle Transportation Planning.

Carrier commitments enable the use of contractual information between a shipper and a carrier, and is used as part of the carrier selection process.

Carrier commitments are defined by the following criteria:

- Lane
- Lane Group
- Reorder Rank

A carrier commitment can be Active, Draft, or Inactive. Start and End Dates can be defined for each carrier commitment.

Rate Charts

Rate charts are a list of carrier rates based on delivery weight, freight class, service level, and so on. Rate charts have to be uploaded before setting up carrier service schedules. Rate charts are specific to service levels, and have specific start, and end dates. A rate chart has the following fields:

- Carrier Name
- Rate Chart Name
- Rates
- Currency
- Effective Dates
- Weight Breaks
- Rating Attributes

Multiple rate charts can be assigned to a single service, however, only one rate chart can be active at a time. The ability to assign multiple rate charts to a particular service enables you to seamlessly move from one rate chart to another in a case where a carrier's rates change regularly. The Start Date and End Date for each rate chart will determine when one expires and another becomes active. For information on assigning multiple rate charts to a single service, refer to the *Oracle Transportation Implementation Execution Oracle Transportation Execution Manual*.

Service Schedules

A service schedule contains journey or vessel specific information for each service. Information in the schedule may include the voyage/flight number, vessel type, and frequency of the service level between locations.

Schedules are primarily posted by ocean and air freight carriers.

LTL and Parcel carriers do not have schedules associated with their service levels. Carriers that operate less frequently than parcel carriers, or LTL carriers publish schedules to provide their users with detailed arrival and departure information.

There are two types of service schedules:

- Date-based schedules: refer to specific departure and arrival dates.
- Frequency-based schedules: refer to weekly or daily service schedules.

Regions

Geographic regions are predefined administrative regions such as cities, countries, states, provinces, cities, postal codes, ports and, airports. Regions use valid administrative region descriptors. For example, San Francisco is a valid city, SFO is a valid airport, and the Port of San Francisco is a valid port. Using geographic region involves validating the descriptor, and the type of region with a local table of geographic regions, or by using an external vendor for validation.

Zones

Zones are collections of geographic regions. For example, a carrier can define a zone that includes the five states of Washington, Oregon, California, Nevada, and Arizona. The transportation industry uses carrier defined zones to support distribution activities, and freight rate structures. You can define zones at any geographic region level (country, state, province, city or postal code). Zones information is defined

and stored locally. User-defined zones model regions of operation that do not match predefined geographic regions.

Rating Zone Charts

Rating zone charts are a group of origin and destination zip codes. Rating is simplified by the use of zones. Zone charts are unique to a pickup origin zip code and are primarily used by parcel carriers. Zones are specific to carrier service levels. A rating zone chart is comprised of the following parameters:

- Carrier Name
- Mode of Transport
- Origin Postal Code Range
- Destination Postal Code Range
- Service Level
- Rating Parameters

Related Topics

Oracle Order Management Implementation Manual

Oracle Shipping Execution User's Guide

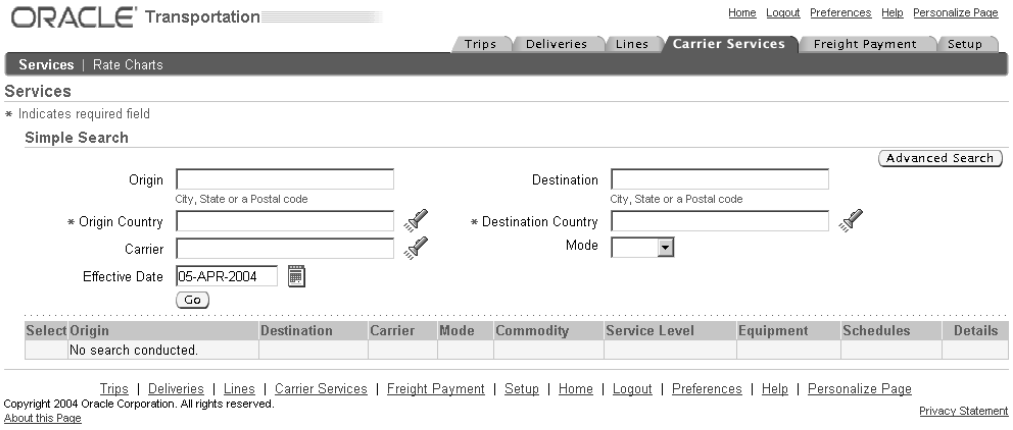
Oracle Transportation Planning User's Guide

Searching for Carrier Services

To find a Service using Simple Search:

1. Navigate to the Services page.

Services Page

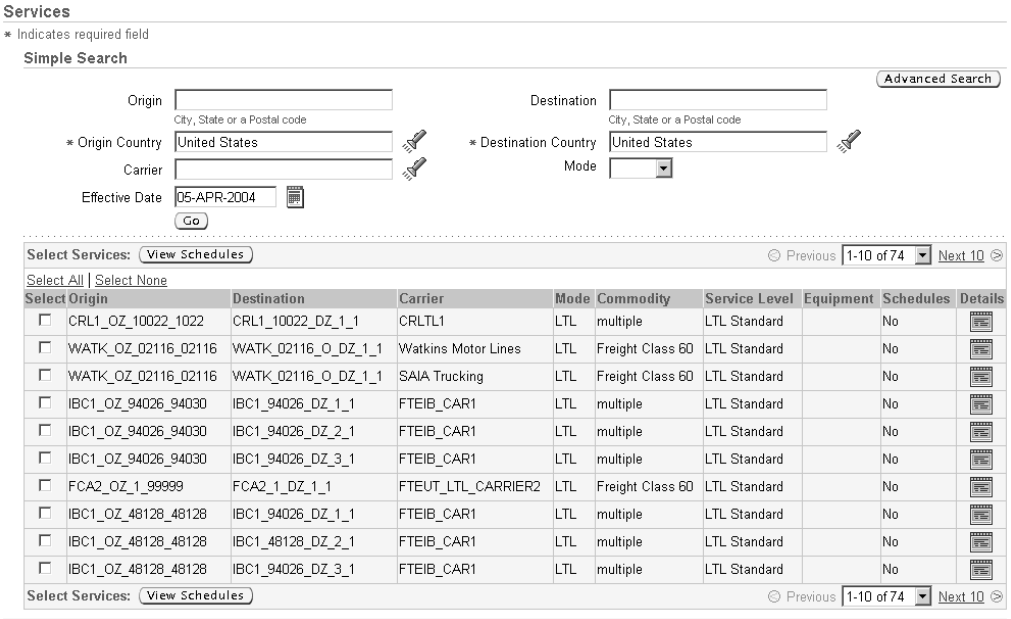


2. Enter any of the following search criteria:
   - Origin
   - Origin Country (required)

- Carrier
- Destination
- Destination Country (required)
- Mode

3. Click Go.

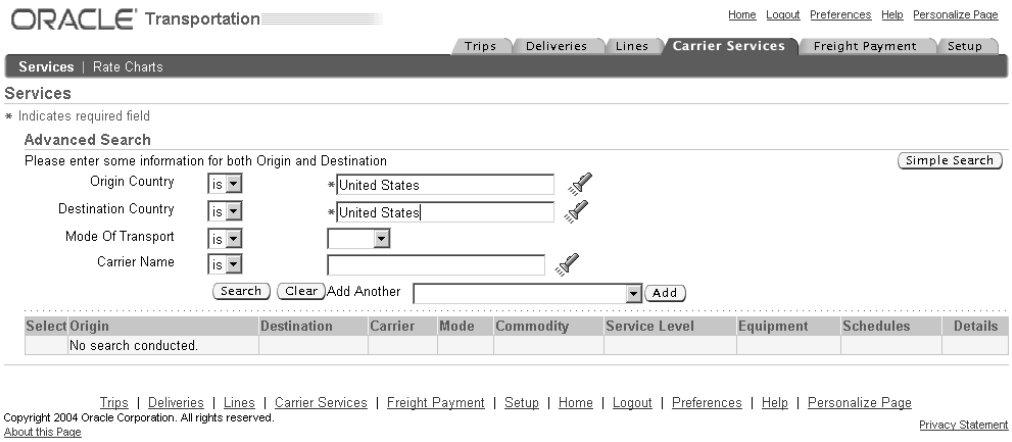
Services Page with Results



To find a Service using Advanced Search:

1. Navigate to the Services page.
2. Click Advanced Search.
3. Choose Origin Country is.
4. Enter the Origin Country criteria (required).
5. Chose Destination Country is.
6. Enter the Destination Country criteria (required).

Services Page - Advanced Search

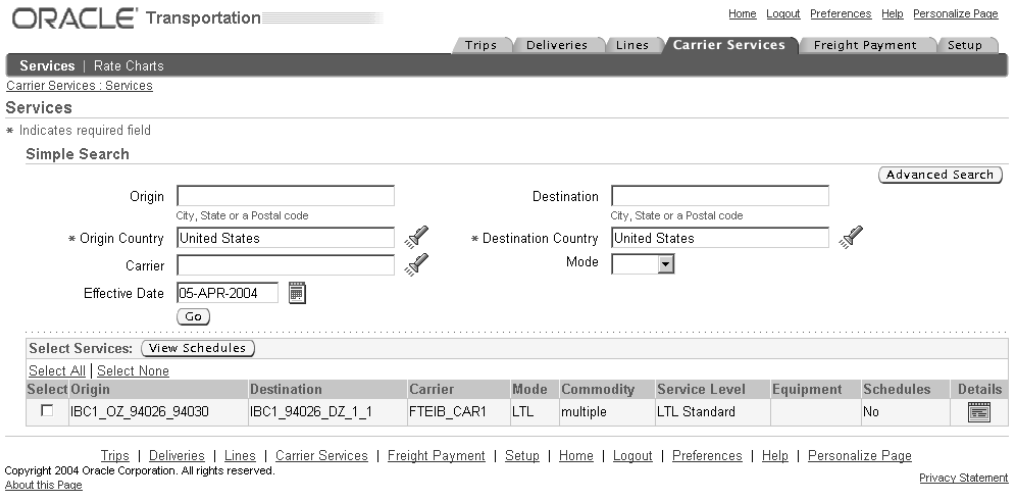


7. Optionally, choose the Mode of Transport and Carrier Name.
8. Optionally, you can add additional criteria to your search by selecting it from the list of values in the Add Another field and clicking Add.
9. Click Search.

To view the schedules for a Service:

1. Navigate to the Services page.
2. Find your Service.
3. Select your Service and click View Schedules.

Service Schedules Page

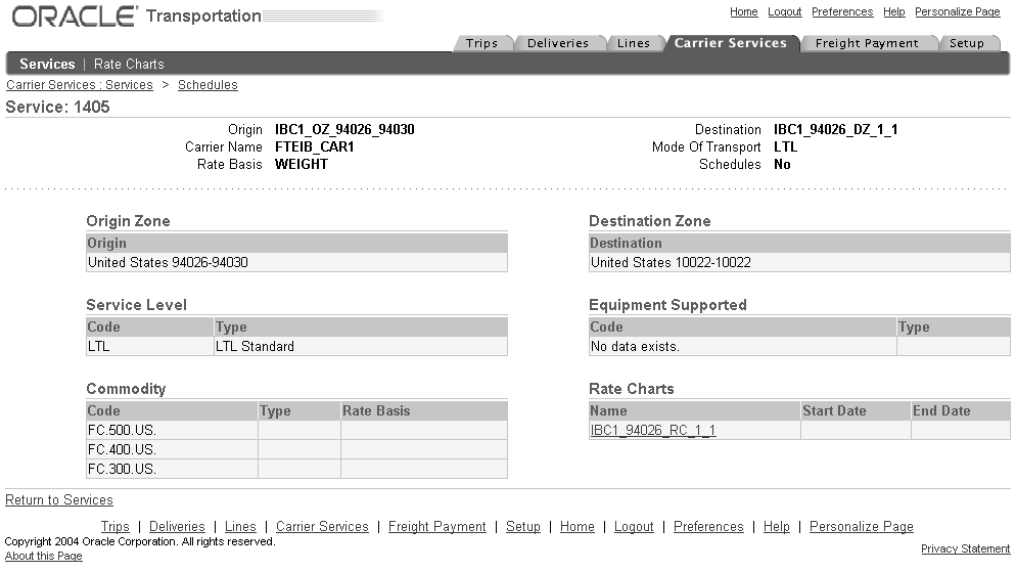


To view the details about a Service:

1. Navigate to the Services page.
2. Find your Service.

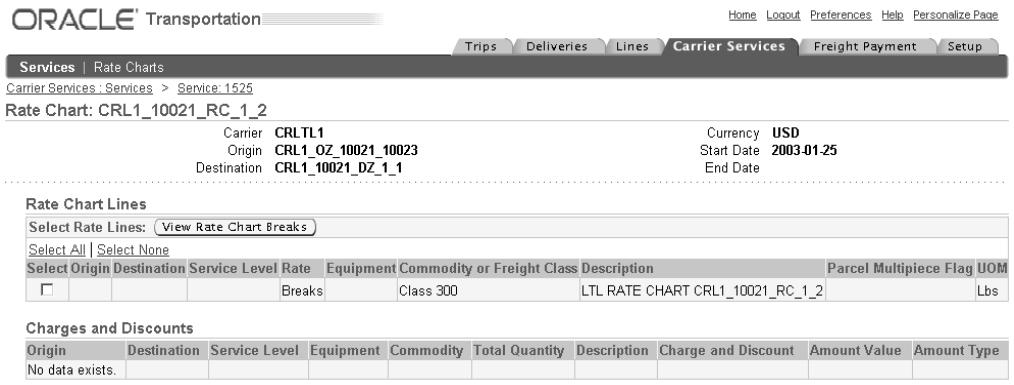
3. Click the Details icon for your Service.

Service Details Page

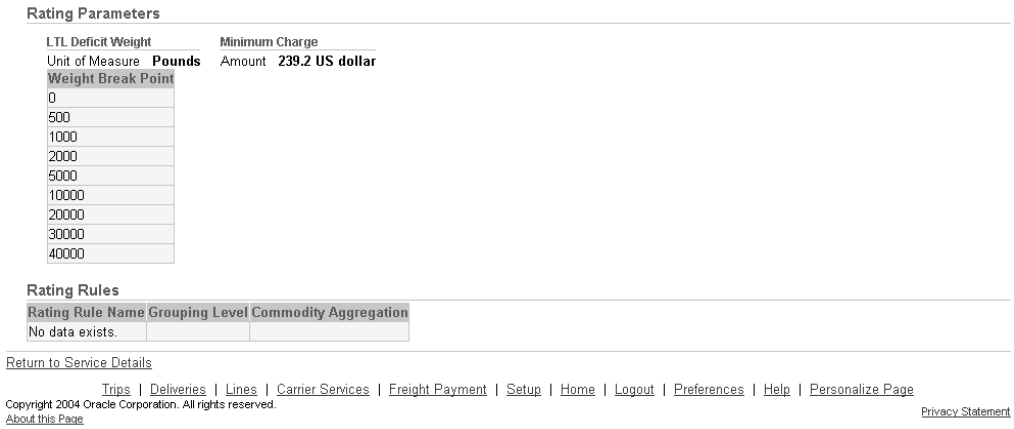


4. To view the rating details, click the Rate Chart Name in the Rate Charts region.

Rate Chart Details Page - Rate Chart Lines Region



Rate Chart Details Page - Rating Parameters Region



Viewing Service Schedules

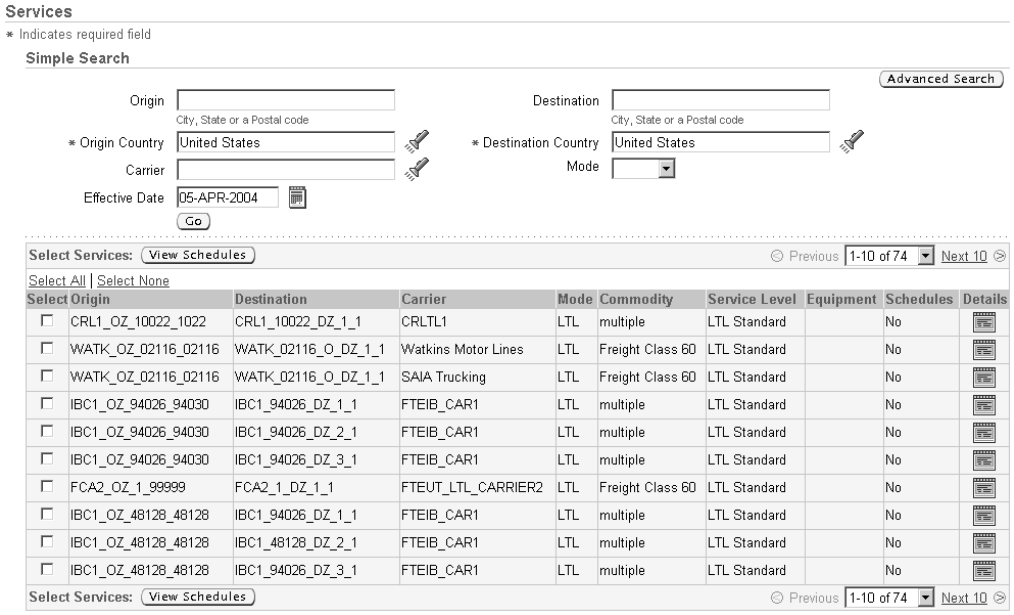
Schedules are associated with carrier services. Select a service to view carrier schedules associated with a service.

On the Services page, the Schedules column indicates if there is a schedule associated with the service or not. If the Schedules column indicates Yes, then there is a schedule attached to the service.

To view service schedules:

1. Navigate to the Services page.
2. Find your service.

Services Page with Results



3. Select your service and click View Schedules.

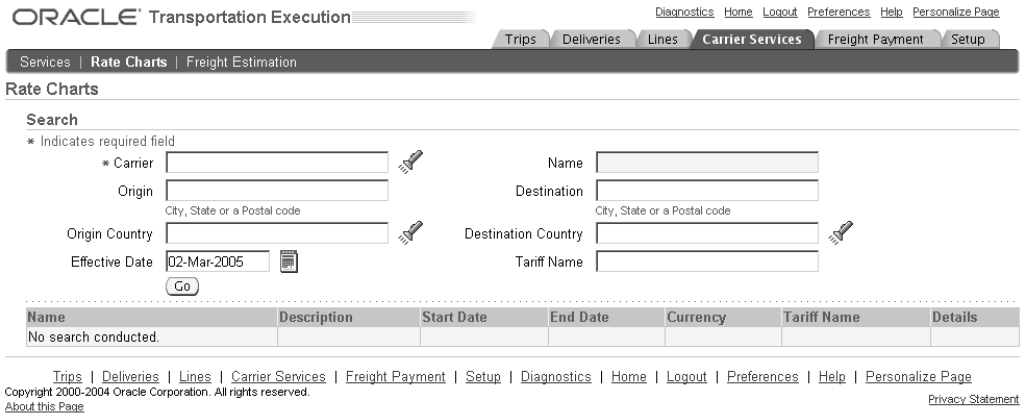
The Schedules page is displayed with a list of schedules for the selected service. You can search for schedules by departure and arrival date ranges. For example, if you have a delivery scheduled for departure over the next two months, then, you can search available schedules based on the delivery departure date. You can also sort schedule lists. You can sort schedules by carrier, departure date, arrival date, departure time, arrival time, and vessel by clicking the column name.

Searching for Rate Charts

To find a rate chart:

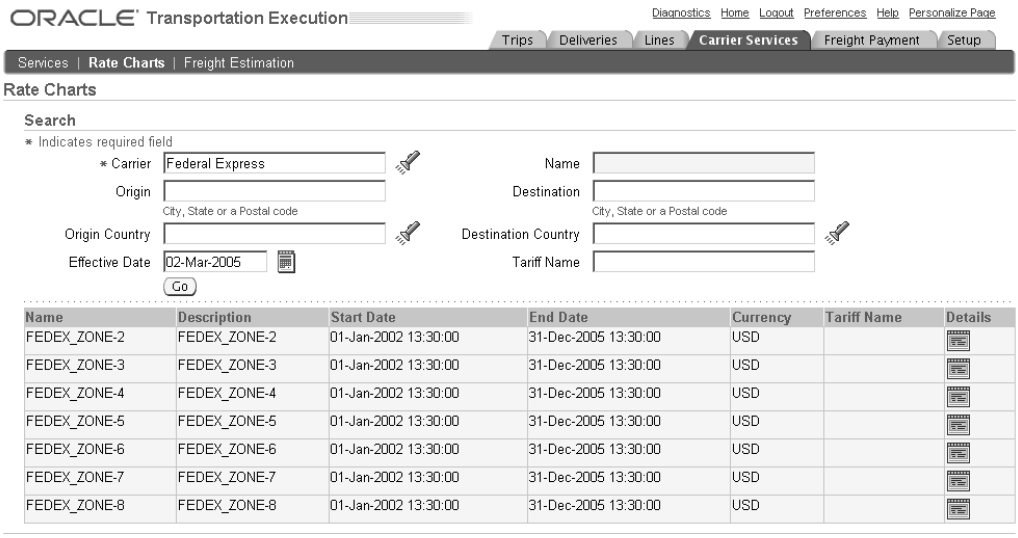
1. Navigate to the Rate Charts page.

The Rate Charts Page



2. Select a Carrier.
3. Optionally, select Origin and Origin Country.
4. Optionally, select a rate chart Name, Destination, Destination Country, and Tariff Name.
5. Click Go.

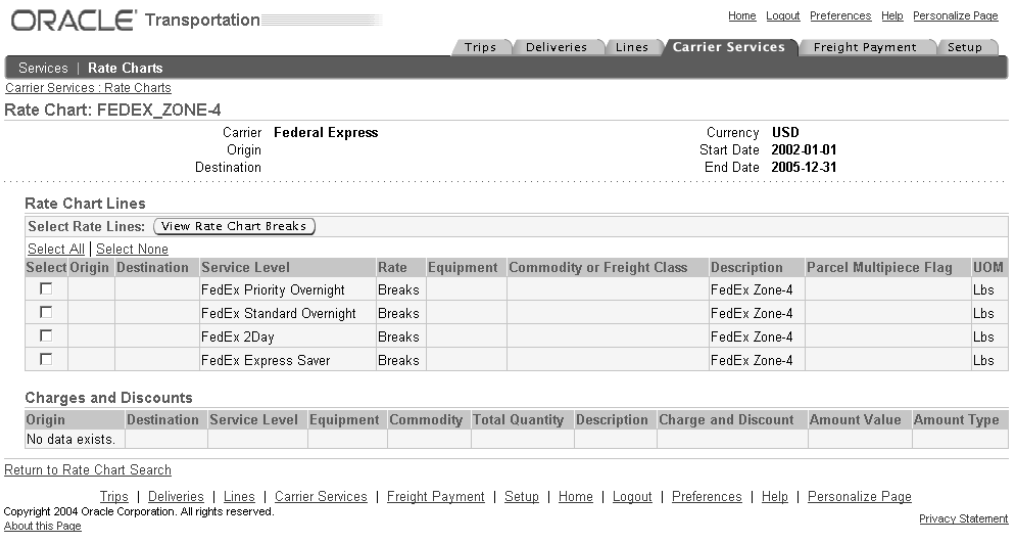
Rate Charts Page with Results



6. Click the Details icon to view the rate chart lines.

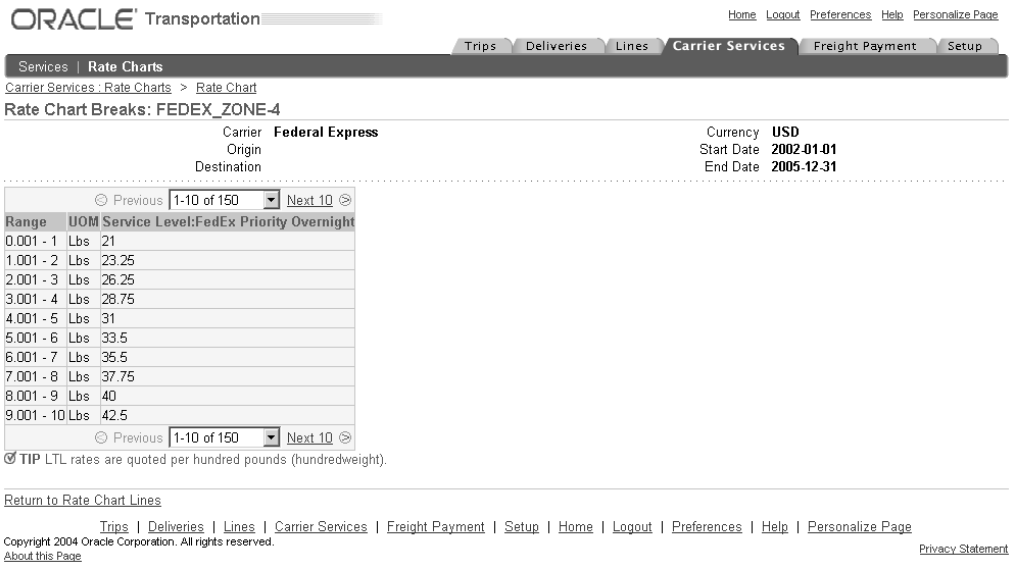
> **Note:** You can view any associated charges and discounts. If charges are established for a rate chart, then the Charge Type, Amount Value, and Amount Type are included in the Charges and Discount section. Oracle Transportation Execution supports three Amount Types: Rate Per Unit of Measure, for example $1.00 per pound, Percent, for example 25%, and Fixed rate, for example $10.

Rate Charts Page with the Rate Chart Lines



7. Select a rate chart line and click View Rate Chart Breaks.

The Rate Chart Page with the Rate Chart Breaks



The Range column displays the break points in weight. The UOM column represents the Unit of Measure. The Commodity or Freight Class column represents the cost per range that the carrier will charge.

Freight Estimation

Overview of Freight Estimation

The Freight Estimation user interface enables you to obtain freight cost estimates without the need for an order or a delivery. Enter the minimum amount of criteria, including:

- Origin and destination address
- Origin and destination country
- Weight
- Unit of measure (The default for weight unit of measure is set in the Global Shipping Parameters.)
- Ship date (The default ship date is the system date.)

Oracle Transportation Execution will estimate the cost using the freight rating engine and return the estimated freight cost in an organized table within the Freight Estimation page.

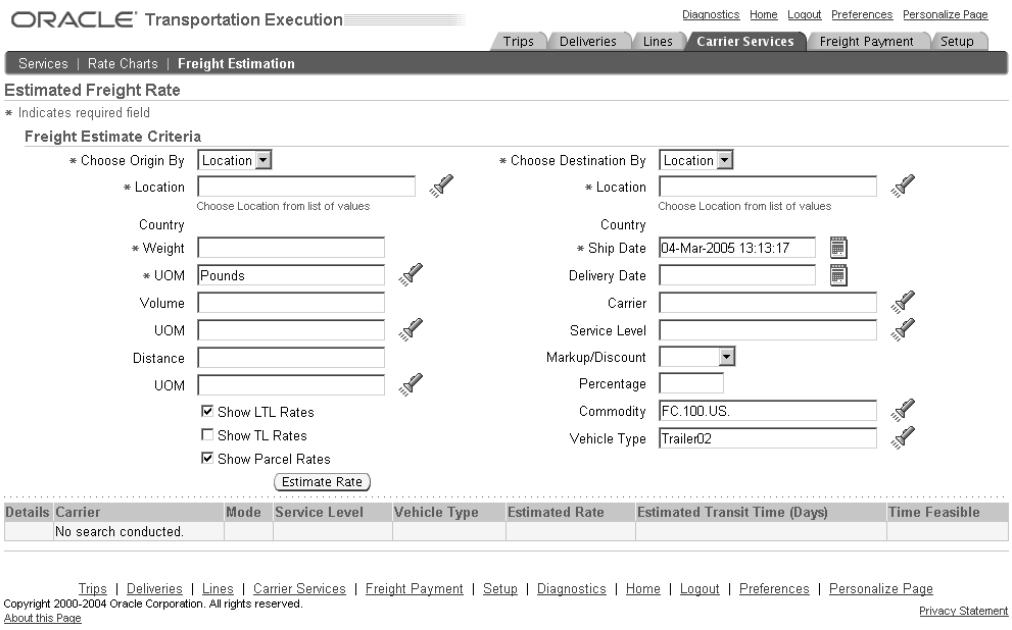
Freight estimation can be used to estimate freight costs for a customer, by the Customer Service or Shipping department, or to quickly check rates once they have been loaded into the system.

Estimating Freight

To estimate freight costs:

1. Navigate to the Freight Estimation page.

Freight Estimation Page



2. Within the Choose Origin By field, select either of the following:
   - Address: (city, state, or postal code)
   - Location: Select Location if you want to estimate freight based on the location you are shipping from.
3. Enter your Origin Address or Location information:
   - If you selected Address in the Choose Origin By field, then enter the following:
     - Address (city, state, or postal code)
     - Country
     - Weight
     - UOM (weight UOM)
   - If you selected Location in the Choose Origin By field, then enter the following:
     - Location (use the list of values to find your location)
     - Weight
     - UOM (weight UOM)
4. Optionally, enter the following:
   - Volume
   - UOM (volume UOM)
   - Distance
   - UOM (distance UOM)
5. Within the Choose Destination By field, select either of the following:

- Address: Select Address if you want to estimate freight based on an exact address that you are shipping to.
- Location: Select Location if you want to estimate freight based on a location code that you are shipping to.

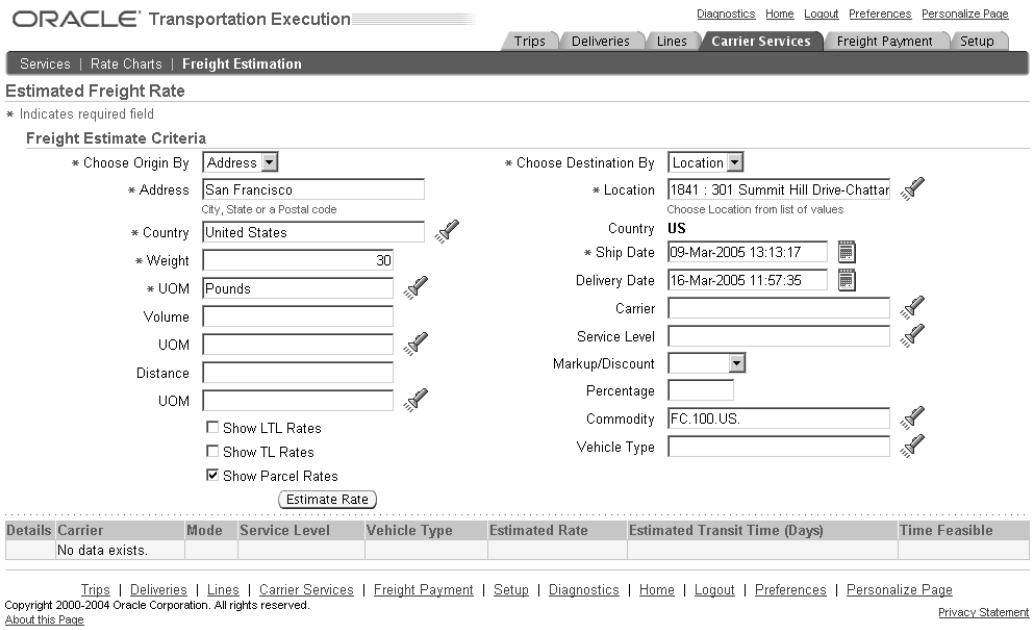
6. Enter your Destination Address or Location information:
   - If you selected Address in the Choose Origin By field, then enter the following:
     - Address (city, state, or postal code)
     - Country
     - Ship Date
   - If you selected Location in the Choose Origin By field, then enter the following:
     - Location (use the list of values to find the location)
     - Ship Date
7. Optionally, enter the following:
   - Delivery Date
   - Carrier
   - Service Level
   - Markup/Discount (choose from the drop down list)
   - Percentage (used with the Markup/Discount option)
   - Commodity (required for LTL rating)
   - Vehicle Type (required for TL rating)
8. Select the Show LTL Rates check box if you want the system to return rates for LTL carriers.
9. Select the Show LT Rates check box if you want the system to return rates for TL carriers.
10. Select the Show Parcel Rates check box if you want the system to return rates for parcel carriers.

Note: You can define defaults for the following fields using profile options:

- Origin Country: FTE: Freight Estimation Default Origin Country
- Destination Country: FTE: Freight Estimation Default Destination Country
- Parcel Mode Selection: FTE: Freight Estimation Default Parcel Mode Selection
- LTL Mode Selection: FTE: Freight Estimation Default LTL Mode Selection
- TL Mode Selection: FTE: Freight Estimation Default TL Mode Selection
- Vehicle Type: FTE: Freight Estimation Default Vehicle Type

- Commodity Code: FTE: Freight Estimation Default Commodity Code

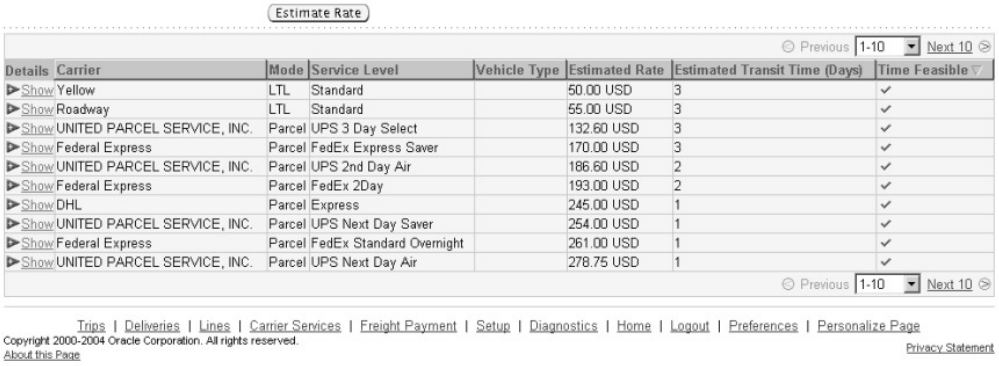
Freight Estimation Page with Search Criteria



11. Click Estimate Rate.

    The results are displayed in an organized table at the bottom of the page.

Freight Estimation Page with Results



> **Note:** Transit time is only supported when Location is selected for both the Choose Origin By and Choose Destination By fields.

The Time Feasible column displays a green check mark if the number of transit time days meet the time interval between the Ship Date and Delivery Date A red X is displayed in the Time Feasible column if the number of transit time days will not meet the time interval between the Ship Date and Delivery Date.

12. Within the Details column of the returned results table, click Show to display the Base Price, Accessorial Charges, and Markup (Discount) Amount if applicable.

Freight Estimation Page with Results and Show Displayed

Carrier Manifesting

Overview of Carrier Manifesting

Carrier manifesting is used by shippers to process parcel deliveries. Carrier manifesting enables you to process deliveries based on a parcel carrier's requirements.

The process of manifesting includes weighing parcels, calculating freight costs, generating shipping documents, and submitting manifest data to a carrier manifesting system at the end of each day.

A manifesting system performs manifesting related activities such as calculating total freight cost, producing carrier required shipment labels and documents.

Oracle Transportation Execution enables you to send XML messages to carrier manifesting systems to upload delivery information. These transactions contain delivery details to determine freight costs, and to print the required labels and paperwork. You can manually or automatically extract the delivery details and send them to a manifesting system. Once the carrier manifesting system responds, then, the delivery is automatically confirmed in Oracle Shipping Execution

Automated Carrier Manifesting: Process Flow

For automated carrier manifesting, you can run a concurrent process to extract the eligible deliveries to be sent to the carrier manifesting system..Eligible deliveries are the deliveries with the status Staged/Pick Confirm. A concurrent process can be scheduled with different parameters, allowing you to schedule different deliveries for different carriers. This program also checks if a delivery has been packed or not. If a delivery is unpacked, then, Auto Pack Option parameter indicates if the delivery should be auto packed by this concurrent process. The parameters for scheduling the concurrent process are:

- Carrier
- Ship From Org

- Scheduled Ship Date
- Customer
- Customer Ship To
- Auto Pack Option

Manual Carrier Manifesting: Business Flow

The following is an example of a manual carrier manifesting business flow:

1. Select the lines to be shipped on Oracle Shipping Execution's Shipping Transaction form, assign the lines to a delivery, pick and pack the delivery lines. There is no restriction on how you can create or pack the delivery. You can auto-create, auto-pack, manually create, manually pack, or use the Packing Workbench. The delivery lines must have a staged status. The carrier has to be present on the delivery, before a delivery can be sent to a carrier manifesting system. If you did not enter a carrier on the sales order line, then, it can be manually entered on the delivery, or by using the action to automate carrier selection. For more information, see *Oracle Shipping Execution User's Guide*.
2. Review the delivery and select Send Outbound Message. Then, select Send Shipping Request and click OK. The XML message is sent to the manifesting system.
3. You can view the message history by selecting View Message History to view the workflow for the XML message.
4. A carrier manifesting system uses the data from the XML message to calculate the total freight costs, and to generate the required labels and shipping documents. In the carrier manifesting system, you can also enter the container weight if it was not sent in the XML message, or add special services.
5. A manifesting system creates an XML message as a response, and sends it to Oracle Transportation Execution. The response includes information such as tracking numbers, freight charges, total delivery weight, and so on. The delivery is updated with delivery and item information, and is automatically ship confirmed. Oracle Transportation Execution submits the delivery details to Oracle Order Management and Oracle Inventory, and the delivery process is completed.

Benefits of Manifesting

Manifesting is important to parcel carriers for several reasons:

- You can send manifest data, for example, line-by-line detail of daily shipping activity to carriers
- You can electronically communicate delivery information to carriers
- You can provide carrier-required shipping documents such as manifest data, shipping label, waybill, COD label, and so on, that are compliant with each carrier's standards
- You can receive tracking numbers to track your delivery
- You can receive detailed manifests that can be used to audit carrier freight bills

Third Party Manifesting System

Oracle Transportation Execution enables integration with third party carrier manifesting systems. Most third party manifesting systems support multiple carriers compliance. A

multiple carrier compliant manifesting system is a system that supports more than one carrier. If you contract with only one carrier to transport your deliveries, then you can implement a manifesting system that uses the carrier proprietary system. Some companies prefer to build their own manifesting systems. These can either be single or multiple carriers compliant depending on each company's requirement.

Third party manifesting is only possible for standard items and serialized items.

Third Party Warehouse Messaging

Oracle Transportation Execution enables you to send XML equivalent ASC X12 940 and 945 EDI messages to your third party warehouse. The message indicates the goods that the warehouse needs to ship on behalf of the shipper. Oracle Transportation Execution extracts the delivery information and sends it to the third party warehouse as a Shipment Request transaction. The Shipment Advice transaction is the response from the warehouse indicating what was shipped. After the message is received from the warehouse, then, the delivery is confirmed.

The following is an example of a third party warehouse business flow:

1. Select the order lines that you want to transmit to the third party warehouse, and assign the lines to a delivery. The delivery lines have a Ready to Release status (if the item is transactable) or Not Applicable status (if the item is non-transactable). For more information on creating deliveries, see the *Oracle Shipping Execution User's Guide*.
2. Review the delivery and select Send Outbound Message. Then, select Send Shipping Request and select OK. The XML message is sent to the third party warehouse.
3. View the message history by selecting View Message History. This enables you to view the workflow for the XML message, and gives you a Sent XML message status.
4. The third party warehouse performs the shipment and creates an XML response message. The XML transaction is imported and processed. The delivery is automatically ship confirmed, and status of the lines are updated to ship confirm. The system submits the delivery information to Oracle Order Management and Oracle Inventory and the delivery process is complete.

   Note: Any shipping holds or credit holds that are placed on order lines after an outbound message has been sent will not be automatically communicated to the third party warehouse instance. To stop a shipment after the outbound message has been sent to the third party warehouse instance, you must send a shipment request cancellation.

Freight Payment and Audit

Freight Payment and Audit, in Oracle Transportation Execution, enables you to automate in-house auditing of freight bills, reducing the costs associated with manual freight bill auditing and the costs of 3rd party audit firms that you might use. Auditing takes place upon receipt of a freight bill from the carrier after shipment delivery has been completed.

Oracle Transportation Execution uses the XML business object ProcessInvoice for incoming XML or EDI translated to XML messages through the Oracle XML Gateway. Oracle Transportation Execution supports the use of outbound flat files to 3rd party audit firms if needed.

You can manually enter freight bills into Freight Payment and Audit within Oracle Transportation Execution. This can be used in a case where you do not use EDI or have the capabilities to use Oracle XML Gateway. Your carriers can also enter freight bills through the Oracle Transportation Execution Carrier Portal. See: Entering Freight Bills., page 4- 3

Once freight bills have entered Oracle Transportation Execution (either electronically or manually), you can perform the following tasks:

- View freight bills
- Edit freight bills
- Delete freight bills
- Match freight bills to bills of lading
- Manually approve freight bills
- Setup a concurrent program to automatically approve audited freight bills that fall within the tolerance that you have defined
- Forward approved freight bills to Accounts Payable
- Generate report of all or specific freight bill discrepancies

> **Note:** The final approval of payment is done by Accounts Payable only. The ability to approve freight payments within Freight Payment and Audit is only provided to forward freight bills to Accounts Payable.

The status of each freight bill changes as it is audited, approved, and paid. The following table shows the freight bill statuses and when they are assigned.

Status	Action and Description
Open	No action has taken place.
Audit Passed	The freight bill has passed the audit.
Audit Failed	The freight bill has failed to pass the audit.
Approved	The freight bill has passed the audit and has been approved either manually or through a concurrent program.
Paid	The freight bill has been approved and has been paid by Accounts Payable.
Obsolete	If a freight bill status is Open and a replacement bill is received, then the original bill status is changed to Obsolete.
In-progress	The time between auditing the bill and the concurrent program actually performing the audit process.

Discrepancies are assigned when the audit process finds a discrepancy between the freight bill and the bill of lading. The following table shows the freight bill discrepancies and when they are assigned.

Discrepancy	Cause and Description
The bill of lading is already audited	The bill of lading number from each freight bill are verified against the available bills of lading available for audit. This discrepancy is assigned when the freight bill refers to a bill of lading that has already been audited.
Bill of lading does not correspond to the carrier specified	Assigned when the bill of lading does not match the bill of lading from a specific carrier.
Bill of lading not found	Assigned when the specified bill of lading number cannot be found.
Master bill of lading not found	Assigned when the specified TL bill of lading number cannot be found.
Bill amount out of tolerance	Assigned when there is a discrepancy between the bill of lading estimate and the actual freight bill amount. This will only occur if the amount is out of tolerance.
Freight class not found in bill of lading	Assigned when a freight class cannot be found on the bill of lading but does exist within the freight bill.
Freight class not found in freight bill	Assigned when a freight class cannot be found in the freight bill, but does exist within the bill of lading.
Freight class amount out of tolerance	Assigned when the freight class amount in the freight bill is out of tolerance with the bill of lading.
Discount amount out of tolerance	Assigned when the discount amount on the freight bill is out of tolerance with the bill of lading.
Discount not specified in freight bill	Assigned when a discount amount is not specified in the freight bill.
Discount amount not specified in bill of lading	Assigned when a discount amount is not specified in the bill of lading but does exist within the bill of lading.
Surcharge amount out of tolerance	Assigned when the surcharge amount on the freight bill is out of tolerance with the bill of lading.
Surcharge type not specified in freight bill	Assigned with the surcharge amount is not specified in the freight bill but does exist within the bill of lading.
Surcharge type not specified in bill of lading	Assigned with the surcharge amount is not specified in the bill of lading but does exist within the freight bill.

Related Topics

Oracle XML Gateway User's Guide

Manually Creating Freight Bills

You manually enter freight bills when the option of using Oracle XML Gateway does not exist. Your carriers can also enter freight bills through the use of the Oracle Transportation Execution Carrier Portal. See: Entering Freight Bills.

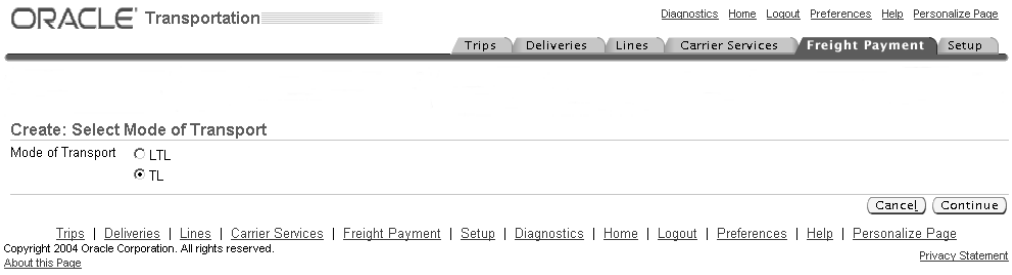
Freight bills are entered for truckload (TL) and less than truckload (LTL) separately.

Creating TL Freight Bills Manually

To manually create TL freight bills:

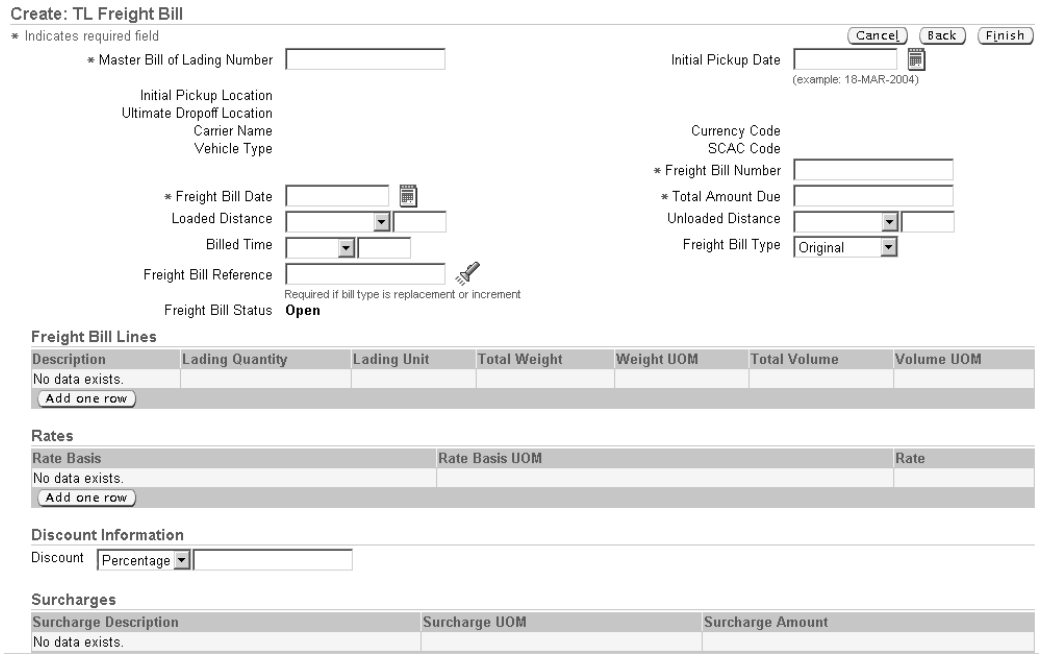
1. Navigate to the Freight Payment and Audit page.
2. Click Create Freight Bill.

Freight Payment and Audit Page - Create TL Freight Bill



3. Select TL as the Mode of Transport.
4. Click Continue.

Create TL Freight Bill Page



5. Enter the Master Bill of Lading Number for the shipment.

   The Ultimate Dropoff Location, Carrier Name, Currency, SCAC Code, and Initial Pickup Location fields will all default based on the Bill of Lading Number that you enter.

6. Enter your Freight Bill Number.
7. Enter the Total Amount Due.
8. If applicable, enter the Unloaded Distance.
9. Enter a Freight Bill Type.
   - Original: If the freight bill is an original
   - Increment: Bill sent by the carrier to supplement the original bill
   - Replacement: If the freight bill is replacing another

     Note: Replacement and increment bills cannot be received electronically. These 2 types of bills can be entered only from the user interface.

10. Select the Initial Pickup Date.
11. Enter a Freight Bill Date.
12. If applicable, select the Loaded Distance and Billed Time.
13. Enter a Freight Bill Reference if the Bill Type is Replacement or Increment.
14. Within the Freight Bill Lines region, click Add one row to enter a line.
15. Within the Rates region, click Add one row to add rates to the freight bill.
16. Optionally, enter a Discount Percentage or Amount.

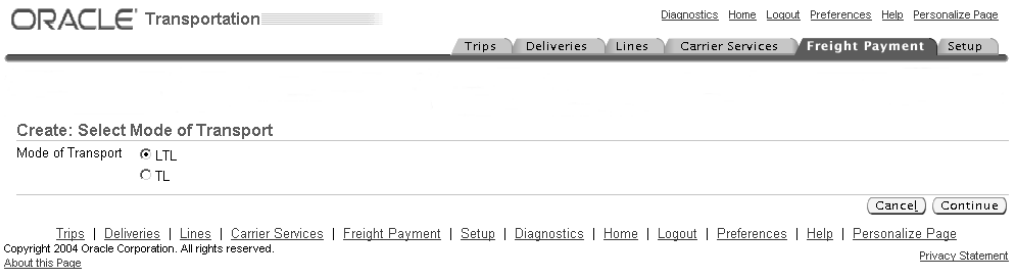
17. If surcharges are used, click Add one row within the Surcharges region.
18. Click Apply.

Creating LTL Freight BIlls Manually

To manually create LTL freight bills:

1. Navigate to the Freight Payment and Audit page.
2. Click Create Freight Bill.

Freight Payment and Audit Page - Create LTL Freight Bill



3. Select LTL as the Mode of Transport.
4. Click Continue.
5. Select the Initial Pickup Date.
6. Enter a Freight Bill Date.
7. Enter a Freight Bill Type.
   - Original: If the freight bill is an original
   - Increment: Bill sent by the carrier to supplement the original bill
   - Replacement: If the freight bill is replacing another
8. Enter a Freight Bill Reference if the Bill Type is Replacement or Increment.
9. Enter your Freight Bill Number.
10. Enter the Total Amount Due.
11. Enter the Bill of Lading Number for the shipment.

    The Ultimate Dropoff Location, Currency, SCAC Code, and Initial Pickup Location fields will all default based on the Bill of Lading Number that you enter.
12. Within the Freight Bill Lines region, click Add one row.
13. Optionally, enter a Discount Percentage or Amount.
14. If surcharges are used, click Add one row within the Surcharges region.
15. Click Apply.

Audit, Editing, and Approval of Freight Bills

Audit and approval takes place by matching the freight bill to the bill of lading (BOL) or Master Bill of Lading (MBOL) to ensure that the freight bill falls within the tolerances that you define.

You can specify, at the carrier level, whether you want to perform the audit at the header level, or at the line level. The Audit Bill Lines option, within the Carriers window, determines the level. If it is enabled, then the audits performed for the particular carrier are done at the line level. If it is not enabled, then the audits for the particular carrier are done at the header level. See: *Oracle Order Management Implementation Manual*, Oracle Shipping Execution Setup chapter.

Automatic Audit and Approval

You define a concurrent program to automatically audit and approve any eligible freight bills that have the status of Open. All freight bills that pass the automatic audit (status Audit Passed) are then automatically approved (status Approved) as long as the Auto-Approval parameter is selected (set to Yes). All approved freight bills are interfaced to Accounts Payables.

Manual Audit and Approval

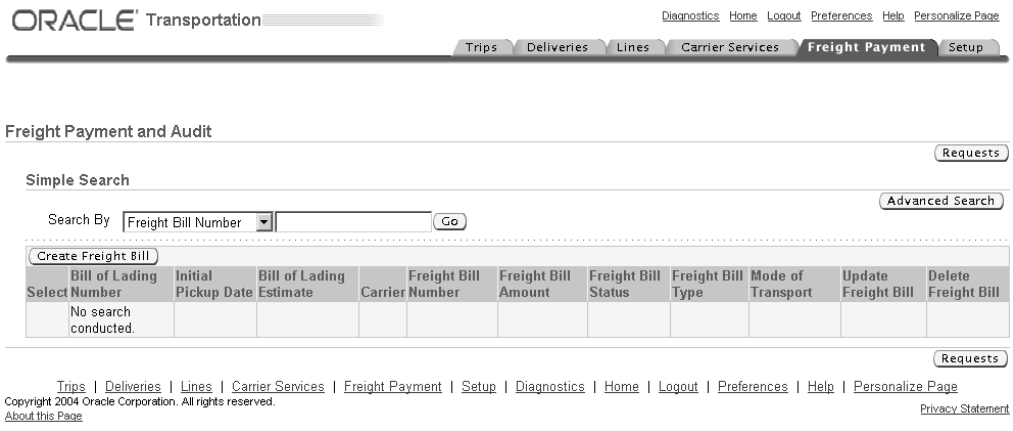
You can manually approve freight bills, edit freight bills, audit freight bills, and approve freight bills one at a time. If an automatic audit and approval fails the audit, you manually update the freight bill after the descrepancies have been resolved.

Finding a Freight Bill with Simple Search

To find a freight bill using Simple Search:

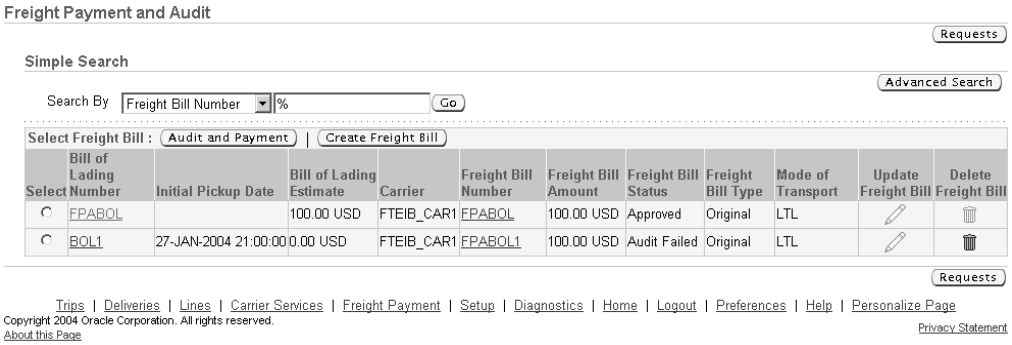
1. Navigate to the Freight Payment and Audit page.
2. Within the Search By field, select Bill of Lading Number, Carrier Name, or Freight Bill Number.

Freight Payment and Audit Page



3. Depending on your Search By selection, enter the search criteria in the field next to the Search By field.
4. Click Go.

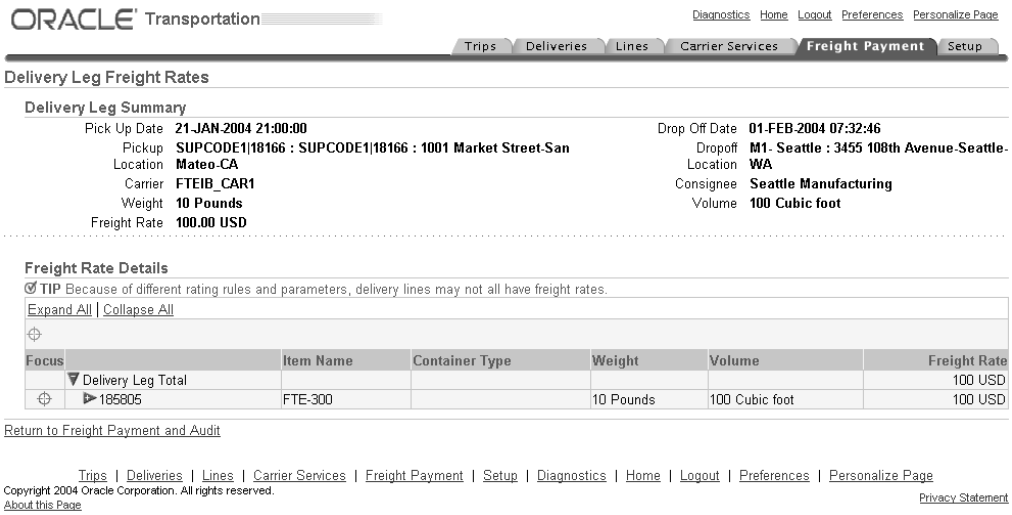
Freight Payment and Audit Page with Returned Results



> **Note:** Depending on the Freight Bill Status, you may or may not be able to edit or delete the selected freight bill. If the Freight Bill Status is Open, then you can either Edit or Delete the freight bill.

5. Click on the Bill of Lading number to view a summary of the bill of lading, and to view the estimated rates of the delivery leg.

View Delivery Leg Freight Rates Page



6. Click the arrow icon next to Delivery Leg Total to expand and view the item number and its attributes.
7. From the Freight Payment and Audit page, click the Freight Bill number to view a summary of that freight bill.

Finding a Freight Bill with Advanced Search

To find a freight bill with Advanced Search:

1. Navigate to the Freight Payment and Audit page.
2. Click Advanced Search.
3. Select either of the following:
   - Search results where each must contain all values entered: This search method will return only those freight bills that have the exact values that you specify
   - Search results where each may contain any value entered: This search method will return any freight bill that has any of the values that you specify.
4. Choose is, contains, starts with, or ends with for the Carrier.
5. Enter the Carrier criteria.

   Note: If you select Carrier is, then you must enter the exact carrier that you are searching for. If you selected Carrier contains, then you need only enter a portion of the carrier name. If you selected Carrier starts with or Carrier ends with, then you need only enter the beginning of the carrier name or the end of the carrier name.

6. Select is, after, or before for the Initial Pickup Date.

   Note: If you select Initial Pickup Date is, then you must enter the exact date that you are searching for. If you select Initial Pickup Date after or before, then you need only enter a date previous to the dates you want returned, or after the dates you want returned.

7. Choose the Initial Pickup Date.
8. Select Freight Bill Number is, contains, starts with, or ends with.

   Note: If you selected Freight Bill Number is, then you must enter the exact freight bill number that you are searching for. If you select Freight Bill Number contains, then you need only enter a portion of the freight bill number. If you select Freight Bill Number starts with or Freight Bill Number ends with, then you need only enter the beginning of the freight bill number or the end of the freight bill number.

9. Select Freight Bill Status is.
10. Choose the Freight Bill Status.
11. Optionally, you can add additional criteria to your search by selecting it from the list of values in the Add Another field and clicking Add.
12. Click Search.
13. Depending on your Search By selection, enter the search criteria in the field next to the Search By field.
14. Click Go.

Editing Freight Bills

To edit a freight bill:

1. Navigate to the Freight Payment and Audit page.
2. Find your freight bill.
3. Click the Edit Freight Bill icon.
4. Update any of the following fields as needed:

   (This list corresponds to LTL.)

   - Initial Pickup Date
   - Freight Bill Number
   - Total Amount Due
   - Freight Bill Reference
   - Bill of Lading Number
   - Freight Bill Date
   - Freight Bill Type
5. Within the Freight Bill Lines region, update the following fields as needed:
   - Lading Quantity
   - Lading Unit (of measure)
   - Description
   - Freight Class
   - Weight
   - Weight UOM
   - Rate
   - Rate Type
6. If a freight bill line currently exists, and you want to remove it, click the Delete icon.
7. Optionally, click Add one row to add an additional freight bill line.
8. Update the Discount Percentage or Amount.
9. Add any surcharges that might exist.
10. Click Apply.
11. From the Freight Payment and Audit page, click the Delete icon to delete the entire Freight Bill.

Auditing and Approving Freight Bills

To audit and approve a freight bill:

1. Navigate to the Freight Payment and Audit page.
2. Find your Freight Bill.

3. Select your freight bill.
4. Click Audit and Payment.
5. Click Audit.

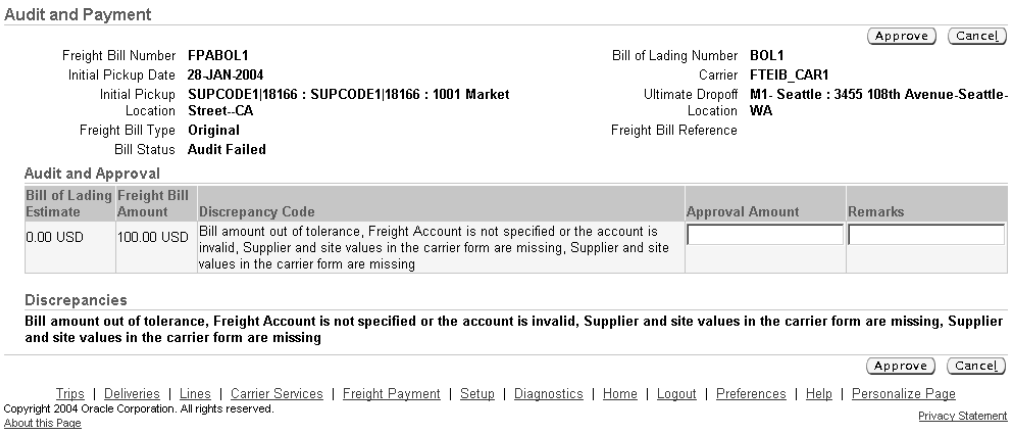
   You will be returned to the Freight Payment and Audit Search page. At the top of the page is a Confirmation note, confirming that your request for audit has been submitted.

6. Document the Request ID from the confirmation.

   After the concurrent request has been approved, the Freight Bill will be ready for approval, or might have discrepancies that need to be approved.

7. Select your freight bill and click Audit and Payment.
8. Enter an Approval Amount and any Remarks.

Audit and Payment Page with Discrepancies



9. Review and correct any discrepancies.
10. Click Approve.

Freight Payment and Audit Discrepancy Report

The Freight Payment and Audit Discrepancy report displays all freight bill discrepancies based on criteria that you define. You can run the report based on total amount, freight class, and discounts and charges. Only those bills in Audit Failed status will be part of the discrepancy report.

Executing the Freight Payment and Audit Discrepancy Report

To execute the Freight Payment and Audit Discrepancy report:

1. Navigate to the Submit Request window.
2. Select Freight Payment and Audit Discrepancy Report from the Name field.
3. Enter the Freight Bill Date From and To.
4. Optionally, enter a Discrepancy Reason and/or Carrier Name.

5. Enter either Carrier Name or Freight Bill Date in the Sort By 1 field.
6. In the Sort By 2 field, enter either Carrier Name or Freight Bill Date, which ever you did not enter in the Sort By 1 field.
7. Click OK.
8. Click Submit.

3

Inbound Logistics

This chapter covers the following topics:

- Overview of Inbound Logistics
- Routing Requests
- Routing Request Validation
- Revising Routing Requests
- Supplier Ship-From Address Book
- Managing Inbound Deliveries
- Searching for Inbound Deliveries
- Viewing and Updating Inbound Deliveries
- Managing Inbound Delivery Lines
- Searching for Inbound Delivery Lines
- Viewing and Updating Inbound Delivery Lines
- Managing Inbound Trips
- Searching for Inbound Trips
- Viewing and Updating Inbound Trips
- Routing Response
- Generating a Routing Response
- Using Advanced Shipment Notices (ASNs)
- Inbound Reconciliation
- Searching for Shipments/Receipts to Reconcile
- Matching and Revert Matching Shipments and Receipts
- Managing Purchase Order Changes

Overview of Inbound Logistics

The Oracle Transportation Execution Inbound Logistics functionality enables you to manage your organizations inbound freight from your suppliers. Oracle Purchasing sends information to Oracle Shipping Execution, which is then visible to Oracle Transportation Execution. This enables you to have full control over inbound

shipments, giving you the ability to lower your freight costs by determining the carrier, organizing multiple pick ups by the carrier, and scheduling the date and time for the pick ups to take place.

Inbound deliveries, lines, trips, and stops are not visible in Oracle Shipping Execution.

Inbound logistics enables the following:

- Full visibility to all inbound shipments.
- The use of Oracle *i*Supplier Portal to upload information updating the inbound shipments with date and quantity information, or if the supplier is not able to use Oracle *i*Supplier Portal, then they can send the updates via email and the Oracle Transportation Execution user can upload the information.
- Carrier selection and rating on inbound shipments (if Oracle Transportation Planning is not being used to derive the carrier and to rate the inbound shipments).
- Combine inbound shipments from various suppliers into a single trip or trips.
- Notify carriers of shipments that you want them to pick up.
- Notify suppliers of the carrier that will be picking up the shipment.
- Track the inbound shipment (once the supplier has shipped it and has sent the electronic Advance Ship Notice.)

Note the following:

- Inbound receipts are not updated with lot, serial, or inner LPN numbers. They are updated with the outermost LPN number if applicable.
- Internal sales orders are not applicable to Oracle Transportation Execution inbound logistics.
- Receiving locations are ignored by Oracle Transportation Execution.
- If multiple ship from locations are being used, multiple receipts are created in order to clearly identify which shipment sent the material (allowing automatic updates to the inbound deliveries).
- Constraint checks are not required when the supplier is managing the inbound freight.
- Constraint checks are not required after a delivery or trip is in-transit or closed.
- You can only assign carriers at the time of purchase order creation if the carrier is assigned to the purchase order's organization before approving the purchase order.

Routing Requests

After a purchase order has been issued to a supplier, that supplier sends you a Routing Request. A Routing Request consists of data indicating the date that your material will be ready for pickup and the quantity of material that will be ready on that date, your purchase order number, purchase order line number, and purchase order shipment number.

The format of the Routing Request is a .txt document that is downloaded from Oracle Transportation Execution. You provide your suppliers with a template of the Routing Request that they fill out and either upload it using Oracle *i*Supplier Portal, or send it using email. If Oracle *i*Supplier Portal is used to upload the Routing Request, then Oracle Transportation Execution will automatically update the deliveries and delivery

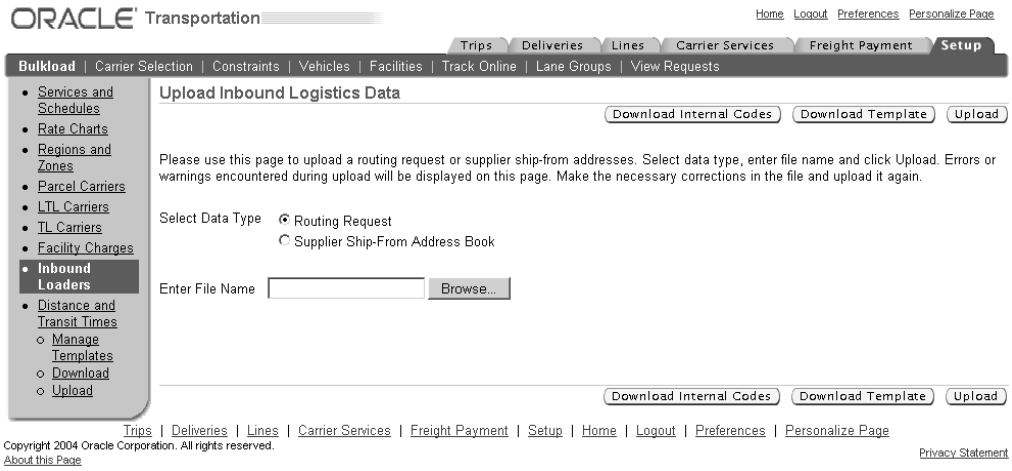
lines based on the information within the .txt document. If the Routing Request is sent using email, you upload the .txt document through the Inbound Loaders page and the deliveries and delivery lines will be updated based on the information within the .txt document.

> **Note:** The contents of a routing request are interpreted as per your national language settings (NLS), including column titles.

To download the Routing Request template and support files:

1. Navigate to the Inbound Loaders page.

Inbound Loader Page



2. Click Download Internal Codes (1).

   Internal Codes is a reference listing of country codes and unit of measure codes that are used within Oracle Transportation Execution. Using these codes ensures that the data sent on the Routing Request will match the data within the Oracle Transportation Execution user's system. For example, if the purchase order uses unit of measure Ea, and the supplier uses EACH, the supplier can use the Internal Codes to find the appropriate value to resolve this discrepancy.

3. Save the compressed file named internalCodes.zip to your local drive.
4. Open the internalCodes.zip file and extract the following files to your local drive:
   - territories.txt
   - uom.txt
5. Click Download Template.
6. Save the compressed file named routingRequest.zip to your local drive.
7. Open the routingRequest.zip file and extract the following files to your local drive:
   - routingreqReadme.htm: Provides explicit instructions on how to create a Routing Request and upload it to Oracle Transportation Execution
   - routreqSample.txt: A sample Routing Request file that you send with the routreqTemplate.txt and routingreqReadme.htm files to your suppliers

- routreqTemplate.txt: The template that you send with the routingreqReadme.htm and routreqSample.txt files to your suppliers

8. Open the routingreqReadme.html file and the routreqSample.txt file and read them carefully.

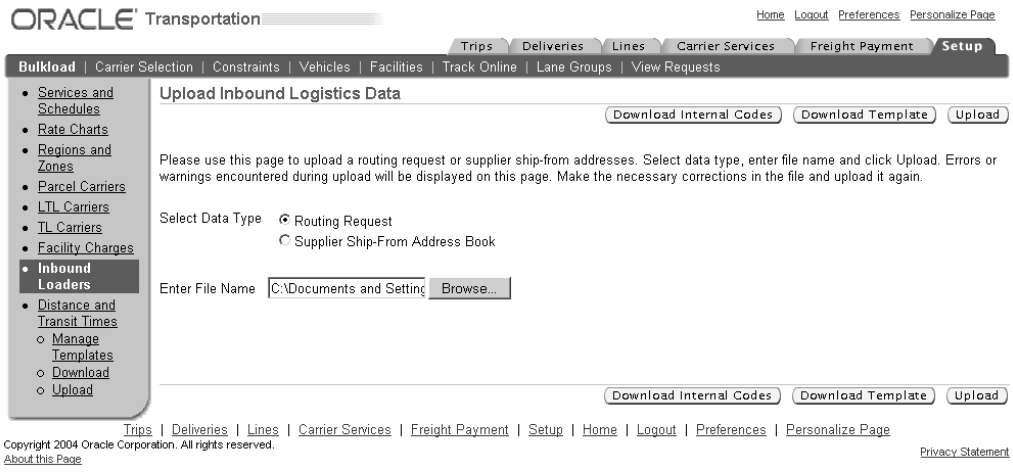
   Note: The routingreqReadme.html file provides explicit instructions on how to create your routing request and upload it to Oracle Transportation Execution.

9. Complete the template, as instructed by the routingreqReadme.html file, with your routing request information.

To upload a Routing Request:

1. Navigate to the Inbound Loaders page.
2. In the Choose File Type region, select Routing Request.
3. In the Choose File region, use the Browse button to locate the Routing Request that your supplier sent.

Inbound Loader Page - Uploading



4. Click Upload.

   After you click Upload File, a concurrent program will validate the information that you have provided. A request ID will be displayed. You can navigate to the Find Request window to verify that your request has completed normally.

Routing Request Validation

The Routing Request contains the following:

- One header, consisting of: Supplier Name, Request Date, Request Number, and Request Revision (all fields require input)
- One or more deliveries, consisting of: Ship From Address 1, 2, 3, and 4, Ship From City, State, County, Country, Province, Postal Code, Ship From Code, Shipper Name, Phone, Email, Number of Containers, Total Weight, Weight UOM, Total

Volume, Volume UOM, and Remarks (Ship From Address 1, Ship From Country, Ship From Code, Ship From Contact Name, and Email all require data)

- One or more delivery lines with each delivery, consisting of: PO Header Number, PO Release Number, PO Line Number, PO Shipment Number, PO Operating Unit, Item Quantity, Quantity UOM, Total Weight, Weight UOM, Total Volume, Volume UOM, Earliest Pickup Date, and Latest Pickup Date (PO Header Number, PO Line Number, PO Shipment Number, PO Operating Unit, Item Quantity, Quantity UOM, Weight UOM, and Volume UOM all require data)

The following criteria must be met in order for Oracle Transportation Execution to validate a Routing Requests:

- It must contain a valid Ship From Location and Location Code (one Ship From Location code (unique key for the supplier ship from location) for each ship from location of each supplier)
- It must contain an Operating Unit
- It must match an existing and open purchase order number, purchase order line, and purchase order shipment number
- All delivery lines must have the same Ship From, Ship To, Ship To Organization, and Customer address (if drop shipping)
- Purchase Order status (if Unapproved, Cancelled, Closed/Finally Closed, or Closed for Receiving, then the Routing Request will be rejected)

  Note: In validating the purchase order status, the purchase order shipment level approval flag determines whether or not the routing request is rejected.

Once Oracle Transportation Execution validates the Routing Request, the delivery and delivery lines are updated and the status of the delivery is updated to Open and the delivery line status is updated to Include for Planning.

Oracle Transportation Execution validates each line during routing request validation. When a new revision of a routing request is processed, if any of the lines have been shipped/received, the new revision is rejected. Oracle Transportation Execution validates routing requests by processing delivery by delivery. If one delivery has an error, Oracle Transportation Execution rejects that delivery and moves on to process the next delivery.

Revising Routing Requests

If a Routing Request needs to be corrected or changed in any way, a revised Routing Request must be sent. Each Routing Request contains a reference and revision number. When a revision occurs, the revision number must be increased by 1 so that the original Routing Request can be replaced with the updated version. Oracle Transportation Execution rejects any Routing Request that has a duplicate reference number and a duplicate revision number. A Routing Request will also be rejected if the revision number is less than the current revision number. For example, if Routing Request 22984 with revision 1 is the current Routing Request in Oracle Transportation Execution, and Routing Request 22984 with revision 2 is received, then revision 2 will replace revision 1. However, if Routing Request 22984 with revision 2 is current, and Routing Request 22984 with revision 1 is received, then revision 1 would be rejected and revision 2 would stay as the current Routing Request.

When Oracle Transportation Execution processes a routing request revision, it reverts the effect of any previous revision and then applies the latest revision (unassigns lines from deliveries created for a previous revision and creates a new delivery as per the current revision.)

To cancel a Routing Request, you send the same request to your supplier using the same reference number, incrementing the revision number by 1, and setting all quantities to 0.

Related Topics

Generating a Routing Response, page 3-19

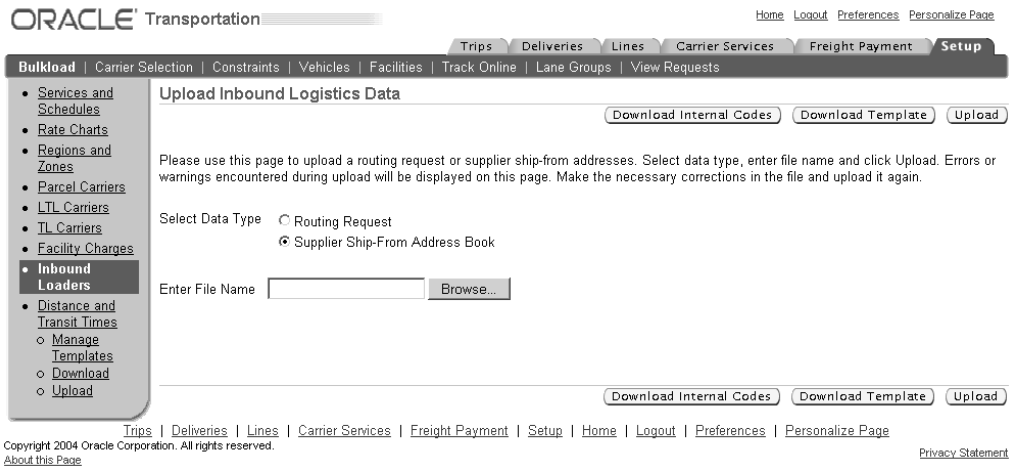
Supplier Ship-From Address Book

The ship-from address is automatically created based on the Routing Request. However, if you want to upload your ship-from addresses or if you need to make a change to an existing ship-from address, then you can create and upload your own ship-from address book. Loading the Supplier Ship-From Address Book is required if your freight is Supplier Managed but you want to rate your inbound deliveries.

To download the Supplier Ship-From Address Book template and support files:

1. Navigate to the Inbound Loaders page.

Inbound Loader Page



2. Select Supplier Ship-From Address book.
3. Click Download Template.
4. Save the compressed file named addressBook.zip to your local drive.
5. Open the addressBook.zip file and extract the following files to your local drive:
   - supplierAddressBookReadme.htm: Provides explicit instructions on how to create a Supplier Ship-From Address Book and upload it to Oracle Transportation Execution

- addBookSample.txt: A sample Supplier Ship-From Address Book file that you send with the addBookTemplate.txt and supplierAddressBookReadme.htm files to your suppliers
- addBookTemplate.txt: The template that you send with the supplierAddressBookReadme.htm and addBookSample.txt files to your suppliers

6. Open the supplierAddressBookReadme.html file and the addBookSample.txt file and read them carefully.

   Note: The supplierAddressBookReadme.html file provides explicit instructions on how to create your Supplier Ship-From Address Book and upload it to Oracle Transportation Execution.

   Complete the template, as instructed by the supplierAddressBookReadme.html file, with your ship-from address information.

7. In the Choose File region, use the Browse button to locate your Supplier Ship-From Address Book.
8. Click Upload.

   After you click Upload File, a concurrent program will validate the information that you have provided. A request ID will be displayed. You can navigate to the Find Request window to verify that your request has completed normally.

   Note: Suppliers can also upload the Address Book from *i*Supplier Portal.

Managing Inbound Deliveries

You manage inbound deliveries from the Deliveries Workbench page. Before you manage a delivery, you must find it using either the Simple Search or Advanced Search from the Deliveries Workbench page.

Searching for Inbound Deliveries

To find an inbound delivery using Simple Search:

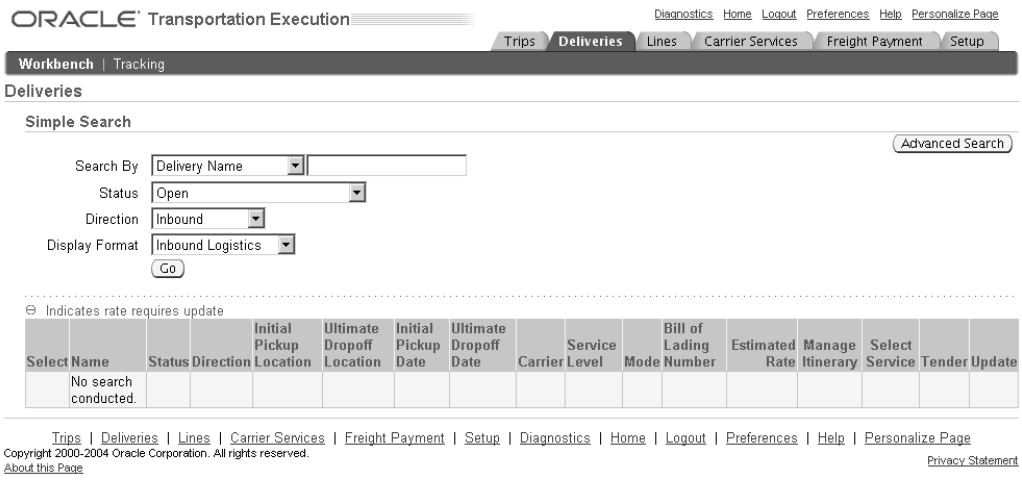
1. Navigate to the Deliveries Workbench page.
2. Select the Search By criteria and enter specific search data.

   You can search by:

   - Delivery Name
   - Bill of Lading Number
   - Order Number
   - Trip Name

3. Choose the Status of the delivery.
4. Choose Inbound as the Direction of the shipment.
5. Choose Inbound Logistics as the Display Format.

Delivery Workbench - Simple Search Page



6. Click Go.

To find an inbound delivery using Advanced Search:

1. Navigate to the Deliveries Workbench page.
2. Click Advanced Search.
3. Select either of the following:
   - Search results where each must contain all values entered: This search method will return only those deliveries that have the exact values that you specify
   - Search results where each may contain any value entered: This search method will return any delivery that has any of the values that you specify.
4. Choose is, contains, starts with, or ends with for the Name.
5. Enter the Name criteria.

   Note: If you select Name is, then you must enter the exact name that you are searching for. If you select Name contains, then you need only enter a portion of the delivery name. If you select Name starts with or Name ends with, then you need only enter the beginning of the delivery name or the end of the delivery name.

6. Select Status is.

   Note: You do not have to select "is" for the Status. You can leave the field blank if you do not know the status of the delivery.

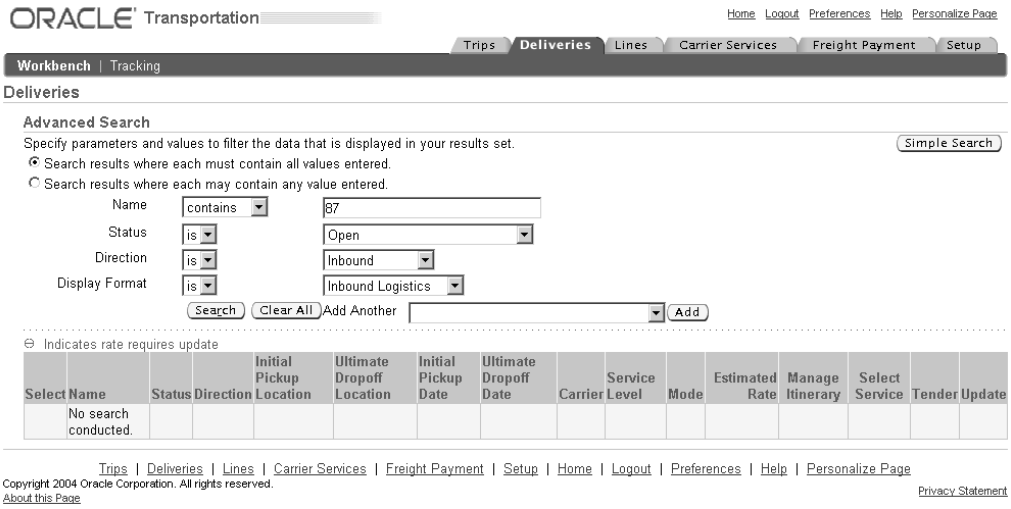
7. Choose the Status.
8. Select Direction is.

   Note: You do not have to select "is" for the Direction. You can leave the field blank if you do not know the direction of the delivery.

9. Choose the Direction.

10. Select Display Format is.
11. Choose the Display Format.

Deliveries Workbench - Advanced Search Page



12. Optionally, you can add additional criteria to your search by selecting it from the list of values in the Add Another field and clicking Add.
13. Click Search.

    The results of your search are displayed within a table at the bottom of the Deliveries Workbench page.

    You perform the following tasks within the Deliveries Workbench page:

    - Update Pickup Date (if not assigned to a trip)
    - View delivery lines
    - Update Drop Off Date (if not assigned to a trip)
    - Update Additional Shipment Information (if the delivery is not Closed)
    - Select a carrier by invoking standard Carrier Selection rules (if not assigned to a trip)
    - Update Mode of Transport (if not assigned to a trip)
    - Update Service (if not assigned to a trip)
    - Update Waybill (if the delivery is not Closed)
    - Update the Number of Containers
    - Update Weight and Volume
    - Update Routing Instructions (if delivery is not Closed or In-Transit)

Viewing and Updating Inbound Deliveries

To view and update inbound deliveries:

1. Navigate to the Deliveries Workbench page.
2. Find your Inbound delivery.

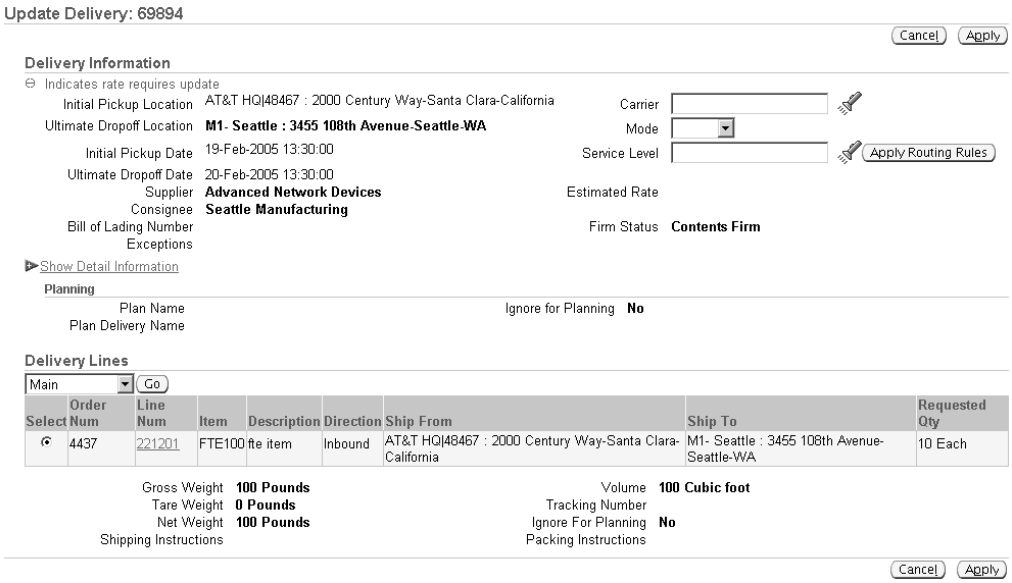
Delivery Workbench Page - Search Inbound Deliveries

3. Click the inbound delivery Name to view the delivery summary and details.
4. Select the check box to Select the delivery, then you can perform the following Actions:
   - Apply Routing Rules
   - Auto Create Trip
   - Cancel Service
   - Close
   - Firm Contents
   - Firm Routing and Contents
   - Generate Routing Response
   - Ignore for Planning
   - Include for Planning
   - Rate
   - Reset Weight and Volume
   - Unfirm

     Note: Click Navigate to Trips or Navigate to Lines which will take you directly to the Trips or Lines page related to your delivery.

5. Click the Update icon to update the inbound delivery.

Update Delivery Page (Inbound)



6. Select an Initial Pickup Date and Ultimate Dropoff Date.
7. Select a Carrier, Mode, and Service Level.
8. Click Apply Routing Rules if applicable.
9. Click Show Detail Information and update the following fields as needed:
   - Gross Weight
   - Tare Weight
   - Net Weight
   - Weight Unit of Measure
   - Additional Shipping Information
   - Number of Containers
   - Volume
   - Volume Unit of Measure
   - Waybill/Airbill Number
   - Routing Instructions
   - Click Reset Weight and Volume if needed
10. Within the Delivery Lines region, click the Line Number to view a summary of the individual line.

Related Topics

Overview of Deliveries, page 2- 2

Managing Inbound Delivery Lines

You manage inbound delivery lines from the Lines Workbench page. Before you manage a delivery line, you must find it using either the Simple Search or Advanced Search from the Lines Workbench page.

> **Note:** Inbound delivery lines can be viewed and managed on the Lines Workbench before a Routing Request is received, and therefore before they are put on a delivery.

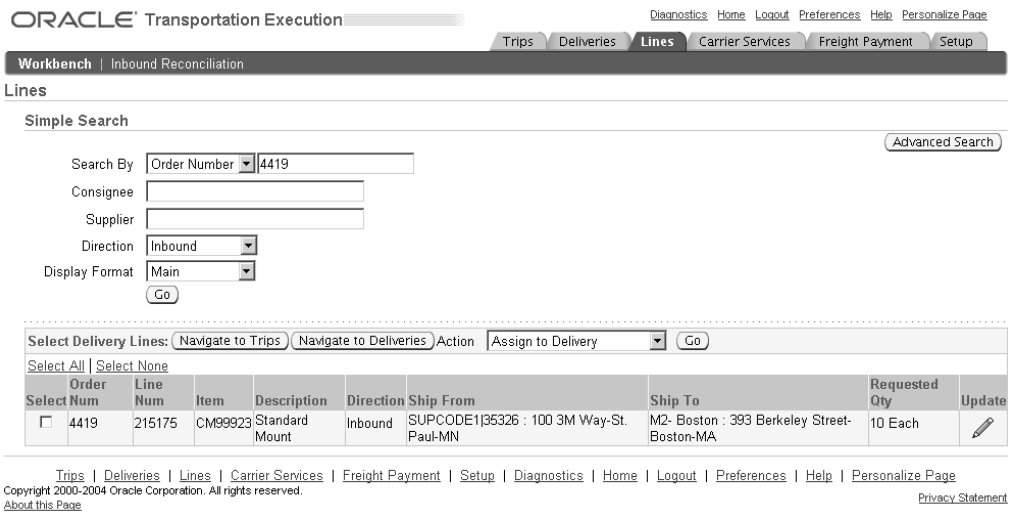
Searching for Inbound Delivery Lines

To find an inbound delivery line using Simple Search:

1. Navigate to the Lines Workbench page.
2. Enter a Search By Order Number, Delivery Name, or Trip Name.

   The order number is the inbound purchase order number.
3. Optionally, enter a Consignee.
4. Optionally, enter a Supplier.
5. Choose Inbound as the Direction.
6. Choose the Display Format.
7. Click Go.

Lines Workbench - Simple Search Page with Results



To find an inbound delivery line using Advanced Search:

1. Navigate to the Lines Workbench page.
2. Click Advanced Search.
3. Select either of the following:
   - Search results where each must contain all values entered: This search method will return only those deliveries that have the exact values that you specify

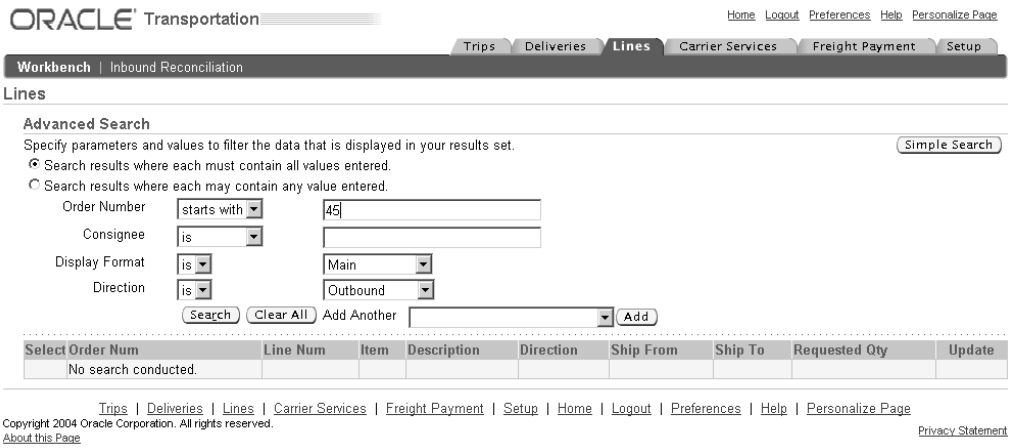
- Search results where each may contain any value entered: This search method will return any delivery that has any of the values that you specify.

4. Choose Order Number is, contains, starts with, or ends with.

   Note: Fields that give you the following options: is, contains, starts with, and ends with hold the following values: If you choose is, then you must enter the exact name you are searching for. If you select contains, then you need only enter a portion of the delivery name. If you select starts with or ends with, then you need only enter the beginning or the end of the specified criteria.

5. Enter the Order Number criteria.
6. Choose Consignee is, contains, starts with, or ends with.
7. Enter the Consignee criteria.
8. Select Display Format is.
9. Choose the Display Format.
10. Select Direction is.
11. Choose Inbound as the Direction.

Lines Workbench - Advanced Search Page



12. Optionally, you can add additional criteria to your search by selecting it from the list of values in the Add Another field and clicking Add.
13. Click Search.

    The results of your search are displayed within a table at the bottom of the Lines Workbench page.

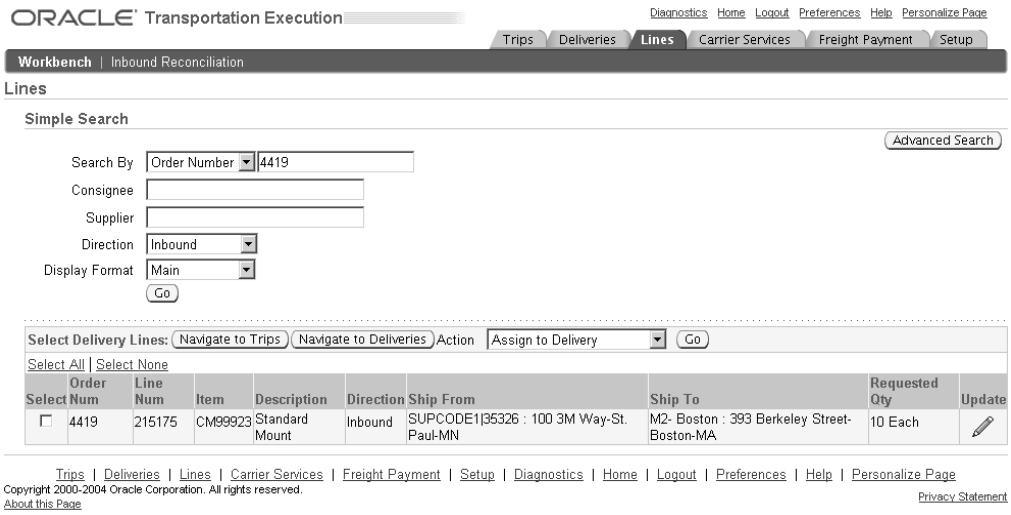
Viewing and Updating Inbound Delivery Lines

To view and update inbound delivery lines:

1. Navigate to the Lines Workbench page.

2. Find your delivery line.

Lines Workbench - Inbound Search Results Page



3. Select the checkbox to Select the delivery line.

> **Note:** On the Lines Workbench, you can select a set of lines and jump directly to the deliveries or to the trips that those lines belong to by clicking either Navigate to Deliveriess or Navigate to Trips.

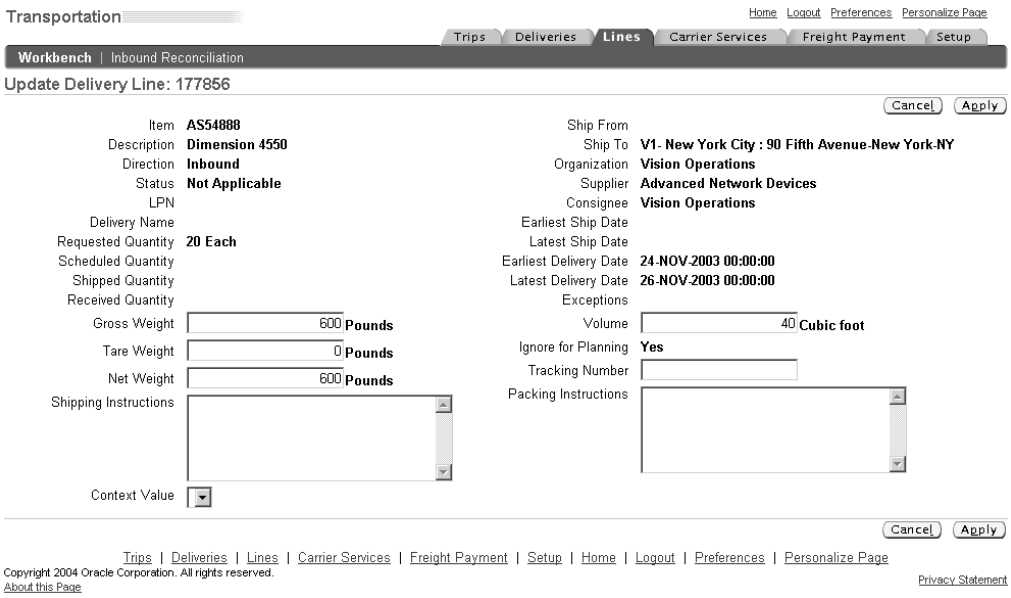
4. To auto create a delivery, click Auto Create Delivery, or select one of the following Actions:

   - Reset Weight and Volume
   - Ignore for Planning
   - Include for Planning
   - Assign to Delivery
   - Unassign from Delivery
   - Split Line (visible only from the quantity display)

> **Note:** If you choose to unassign lines from a delivery, the ship-from location becomes null and internal references to the routing request also becomes null. If you want to re-configure your deliveries, you should use the split delivery action to preserve the ship-from location and routing request references.

5. Click the Update icon to update the inbound delivery line.

Update Delivery Line Page



6. Update the following fields as needed:
   - Gross Weight
   - Tare Weight
   - Net Weight
   - Shipping Instructions
   - Volume

     Note: The Volume Unit of Measure for Delivery Lines is based on the Volume Unit of Measure from the Delivery.

   - Tracking Number
   - Packing Instructions
7. Click Apply.

Related Topics

Managing Delivery Lines, *Oracle Shipping Execution User's Guide*

Managing Inbound Trips

You manage inbound trips from the Trips Workbench page. Before you manage a trip, you must find it using either the Simple Search or Advanced Search from the Trips Workbench page.

Searching for Inbound Trips

To find an inbound trip using Simple Search:

1. Navigate to the Trips page.
2. Select the Search By criteria and enter specific search data.

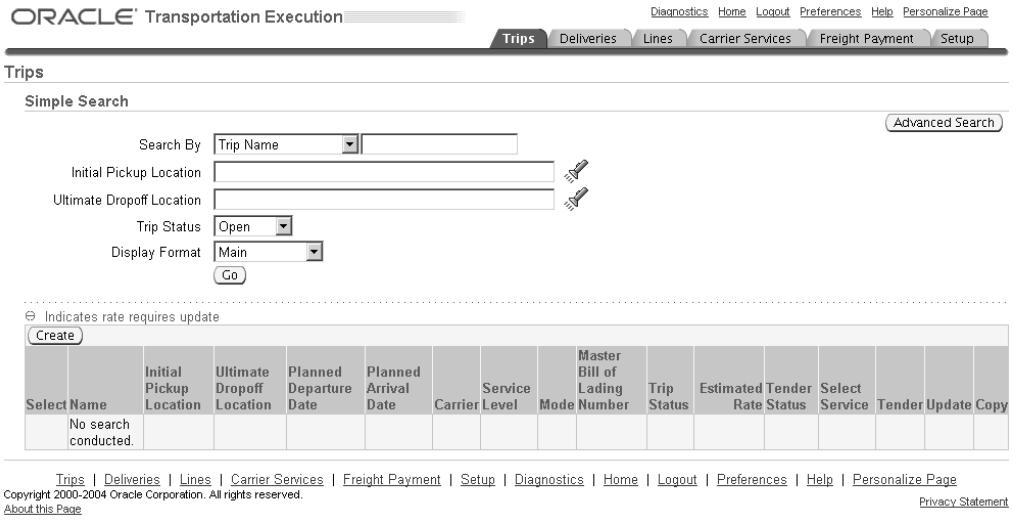
   You can search by:

   - Delivery Name
   - Trip Name
   - Master Bill of Lading
   - Order Number
3. Optionally, enter an Initial Pickup Location.

   Note: Although these fields are optional, at least one field must contain search criteria.

4. Optionally, enter an Ultimate Dropoff Location.
5. Optionally, select a Trip Status.
6. Choose the Display Format.

Trips Workbench - Search Page



7. Click Go.

To find an inbound trip using Advanced Search:

1. Navigate to the Trips page.
2. Click Advanced Search.
3. Select either of the following:

- Search results where each must contain all values entered: This search method will return only those deliveries that have the exact values that you specify
- Search results where each may contain any value entered: This search method will return any delivery that has any of the values that you specify.

4. Choose is, contains, starts with, or ends with for the Name.
5. Enter the Name criteria.

   Note: If you select Name is, then you must enter the exact name you are searching for. If you select Name contains, then you need only enter a portion of the delivery name. If you select Name starts with or Name ends with, then you need only enter the beginning of the delivery name or the end of the delivery name.

6. Select Initial Pickup Location is.

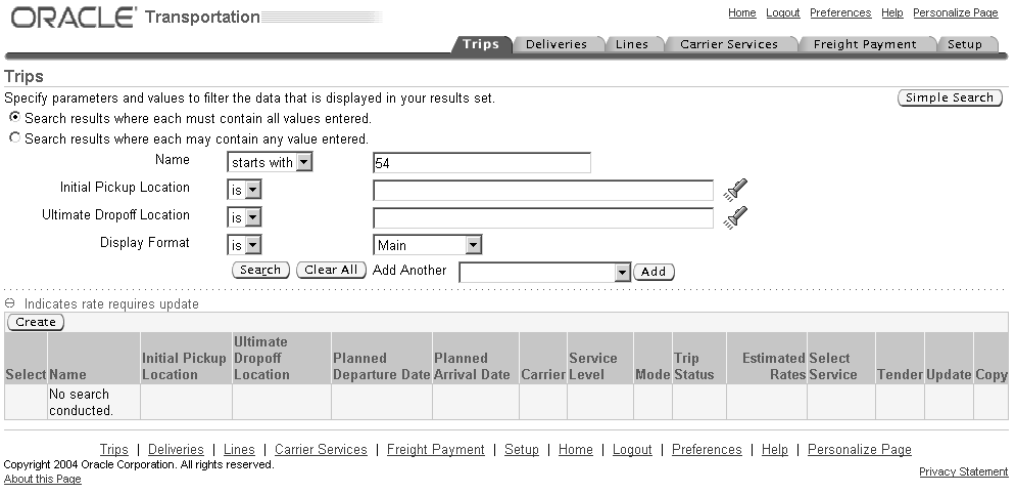
   Note: You do not have to select "is" for the Initial Pickup Location. You can leave the field blank if you do not know the location of the trip.

7. Choose the Initial Pickup Location.
8. Select Ultimate Dropoff Location is.

   Note: You do not have to select "is" for the Ultimate Dropoff Location. You can leave the field blank if you do not know the location of the delivery.

9. Choose the Ultimate Dropoff Location.
10. Select Display Format is.
11. Choose the Display Format.
12. Optionally, you can add additional criteria to your search by selecting it from the list of values in the Add Another field and clicking Add.

Trips Workbench - Advanced Search Page



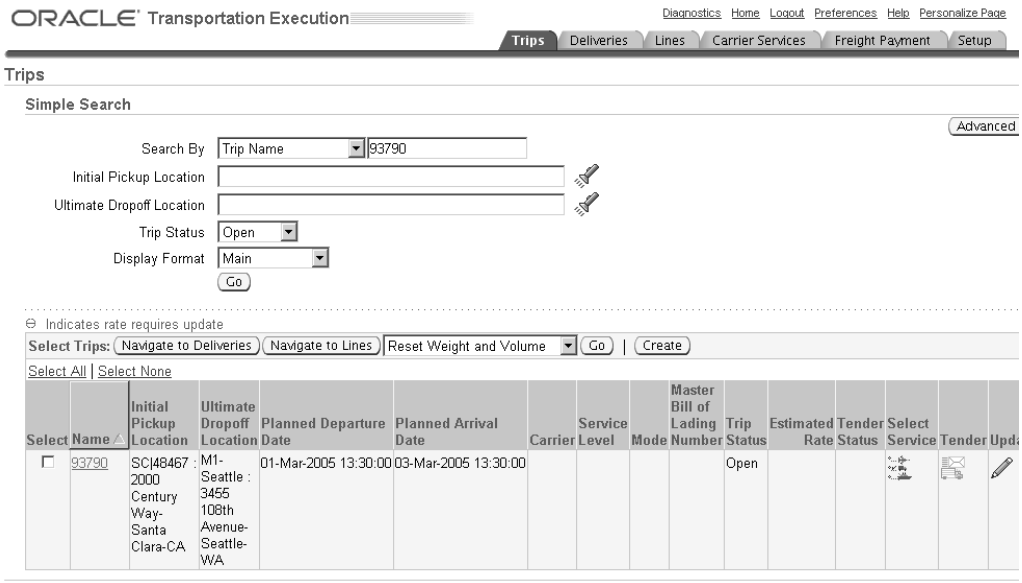
13. Click Search.
14. The results of your search are displayed within a table at the bottom of the Trips Workbench page.

Viewing and Updating Inbound Trips

To view and update inbound trips:

1. Navigate to the Trips page.
2. Find your inbound trip.

Trips Workbench - Inbound Search Results Page

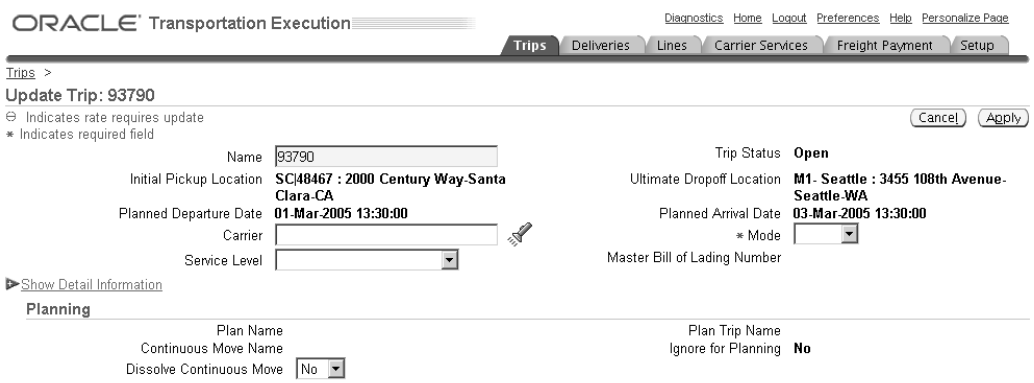


3. Select the checkbox to Select the trip, then you can perform the following Actions:
   - Reset Weight and Volume
   - Cancel Service
   - Firm Routing
   - Firm Routing and Contents
   - Generate Routing Response
   - Ignore for Planning
   - Include for Planning
   - Tender
   - Unfirm

     Note: Click Navigate to Deliveries or Navigate to Lines which will take you directly to the Deliveries or Lines page related to your trip.

4. Click the Update icon to update the inbound trip.

Update Trip Page



5. Update the following fields as needed:
   - Name
   - Carrier (updateable only if the current value is null)
   - Service Level (updateable only if the current value is null)
   - Mode (updateable only if the current value is null)
6. Within the Trip Stop Information region, update the following as needed:
   - Location (only if there are no deliveries associate with the stop)
   - Planned Arrival Date (updateable if the Trip is not firm, and the Stop is open)
   - Planned Departure Date (updateable if the Trip is not firm, and the Stop is open)
   - Gross Departure Weight
   - Weight UOM
7. Click Update Stop Status to update the status of the trip stop.
8. Click the Remove icon to remove a stop from an existing trip stop.

Related Topics

Overview of Trips, page 2-24

Routing Response

You send a Routing Response, typically in the form of an email, to your suppliers informing them of the date and time of your pickup, the carrier you are using, and any special instructions that you have specified for the delivery or trip. A routing response can be sent as long as the first leg of the inbound delivery has been created.

> **Note:** If your Routing Response has been sent, and the Transportation Arranged option, on the Purchase Order header, has changed from Buyer to Supplier, no warning will be given to the supplier and any existing released orders will not be affected.

You will not be able to send a Routing Response if the Transportation Arranged option is set to Supplier before a Routing Response was sent.

If a Routing Response needs to be corrected or changed in any way, a revised Routing Response must be sent to your supplier. Each Routing Response contains a reference and revision number. When a revision occurs, the system increments the revision number by 1 so that the original Routing Response can be replaced with the updated version. If a change is made to agreement-level terms, for example FOB, the change will only take affect on future releases.

Note: You must send revised Routing Responses manually. There is no automatic process to send revised Routing Responses.

Note: The routing response is sent to the email specified as the contact on the ship-from location information section of the routing request. Oracle Transportation Execution refers to the latest contact information only. History is not maintained.

If the trip was tendered, and the carrier has not accepted the tender, then the Routing Response will error out.

If the trip was not tendered, and the carrier is tendered enabled, then a warning is issued.

Routing response is visible through the Oracle iSupplier Portal. See: *Oracle iSupplier Portal User's Guide.*

Generating a Routing Response

To generate a routing response:

1. Navigate to the Trips page or the Delivery Workbench page.
2. Select the checkbox to Select the Delivery or Trip.
3. Select the Action Generate Routing Response.

   An Oracle Workflow is executed and the supplier is notified. Typically, Oracle Workflow will generate an email that will be sent to the supplier.

   If a change is made to your delivery, you must select the Action Generate Routing Response again to send a revised Routing Response to your supplier.

Using Advanced Shipment Notices (ASNs)

Advanced Shipment Notices (ASNs) are used by your suppliers to send shipment information to you. This information confirms the actual ship date and time, quantity, carrier, weight, purchase order number, number of pieces, and other shipment information.

With Oracle Transportation Execution, you use the ASN received from your supplier to verify or update your inbound deliveries. For example, Oracle Purchasing ordered 5 cases of paint from a supplier. Using Routing Requests and Routing Responses, your scheduled ship date, quantity, carrier, and other attributes have been agreed on. However, the actual shipment date occurred 1 day after the ship date on the

Routing Response. In this case, the ASN information is used to update or revise Oracle Transportation Execution information on the delivery.

> **Note:** The ASN does not capture secondary quantities. It is calculated as follows: secondary quantity = primary quantity *(secondary ordered quantity/primary ordered quantity)

Once the ASN is received into Oracle Transportation Execution, the following attributes are updated:

- Delivery Level:
  - Delivery Status (updated to Intransit)
  - Actual Pick up Date (updated with the ASN ship date)
  - Actual Drop off Date (updated with expected_receipt_date from the ASN if not Null, and if not greater than the Actual Pick up Date, then it is set to the same date as the Actual Pick up Date)
  - Tracking Number (only if the tracking number is the same for all lines within the delivery)
  - Bill of Lading
- Delivery Line Level:
  - Delivery Line Status (changes to Shipped)
  - Quantity Shipped
  - Tracking Number
  - Container

Inbound Reconciliation

Inbound reconciliation enables you to match inbound shipments with inbound receipts. You can also un-match reconciled receipts.

Inbound reconciliation is required when the system cannot automatically match on the delivery line. For example, at the point of receipt, if there were multiple ship from locations for the same purchase order shipment line, the delivery line will be split, and the system cannot tell which ship from goes with which line.

In order for a match to be successful, all ASN lines must match the receipt lines. The match will fail if all lines do not match. You can match transactions individually, for example if you have one receipt line that is return to vendor (RTV) pending and another line that is receipt correction pending, then you can match each transaction individually and save. However, for any given receipt line, you must match all pending transactions. Also, the match will fail if the itinerary of the delivery that you are matching is not complete.

> **Note:** Incoming RTVs (or RMAs) do not create delivery transactions.

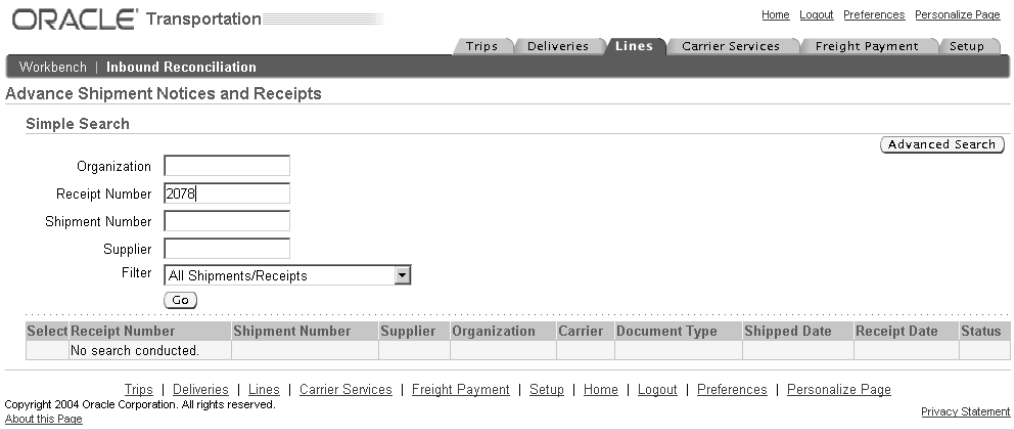
> **Note:** Oracle Transportation Execution Inbound Logistics manages incoming RTVs, however no outbound RTVs are managed by Oracle Transportation Execution.

Searching for Shipments/Receipts to Reconcile

To find a shipment or receipt to reconcile using Simple Search:

1. Navigate to the Advanced Shipment Notices and Receipts page.

Advanced Shipment Notices and Receipts - Simple Search Page



2. Enter the search criteria in at least one of the following fields:
   - Organization
   - Receipt Number
   - Shipment Number
   - Supplier
3. Select the Filter of either All Shipments/Receipts or Only Unmatched Shipments/Receipts.
4. Click Go.

To find a shipment or receipt to reconcile using Advanced Search:

1. Navigate to the Advanced Shipment Notices and Receipts page.
2. Click Advanced Search.
3. Select either of the following:
   - Search results where each must contain all values entered: This search method will return only those deliveries that have the exact values that you specify
   - Search results where each may contain any value entered: This search method will return any delivery that has any of the values that you specify.
4. Choose is, contains, starts with, or ends with for the Organization.
5. Enter the Organization criteria.

> **Note:** If you select Organization is, then you must enter the exact name you are searching for. If you select Organization contains, then you need only enter a portion of the delivery name. If you select Organization starts with or Organization ends with, then you

need only enter the beginning of the organization or the end of the organization.

6. Select Receipt Number is.

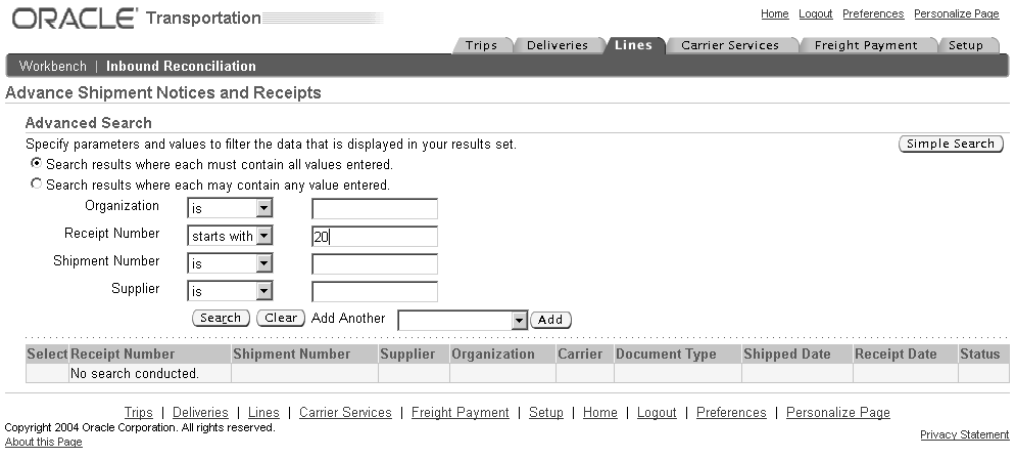
   Note: You do not have to select "is" for the Receipt Number. You can leave the field blank if you do not know the receipt number, however you are required to enter at least partial data for at least one of the search criterion.

7. Enter the Receipt Number.
8. Select Shipment Number is.

   Note: You do not have to select "is" for the Shipment Number. You can leave the field blank if you do not know the shipment number, however you are required to enter at least partial data for at least one of the search criterion.

9. Enter the Shipment Number.
10. Select Supplier is.
11. Enter the Supplier.

Advanced Shipment Notices and Receipts - Advanced Search Page



12. Optionally, you can add additional criteria to your search by selecting it from the list of values in the Add Another field and clicking Add.

Matching and Revert Matching Shipments and Receipts

The returned results from your search for shipments and receipts are displayed in a table format. The last column in the table is Status. The following Statuses are available for each shipment and receipt:

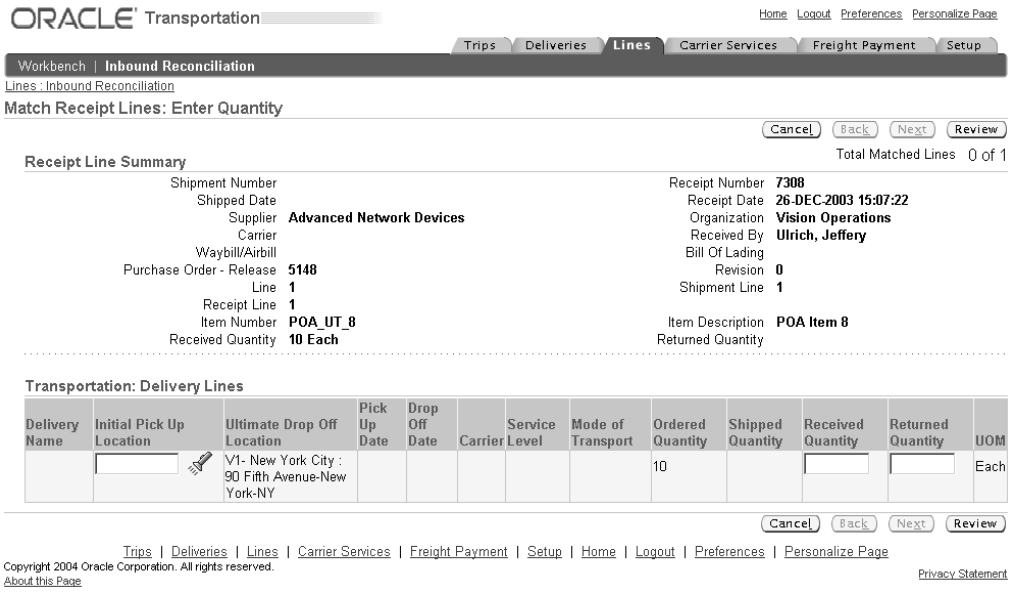
- Matched: You can Revert Matching and un-match the shipment or receipt
- Manual Reconciliation Required: You can Match the shipment or receipt

- Transaction Matched, but Child Transaction Pending: The match was successful, but another transaction is pending and must be reconciled before the match is final

To match shipments and receipts:

1. Navigate to the Advanced Shipment Notices and Receipts page.
2. Find your shipment or receipt.
3. Ensure that the Status is Manual Reconciliation Required.
4. Select your shipment or receipt and click Match.

Match Receipt Lines: Enter Quantity Page



5. Enter the Initial Pick Up Location if applicable.
6. Enter the Received Quantity and Returned Quantity if applicable.
7. Click Review.

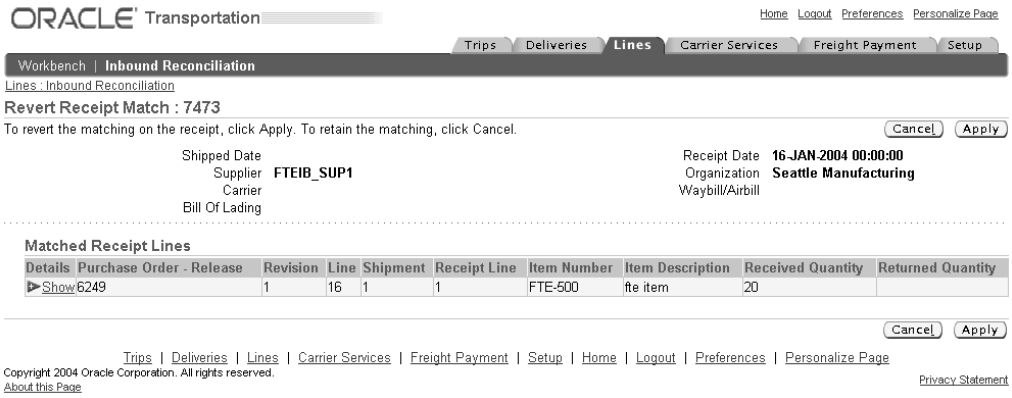
   Review the information and click Back to make any changes.
8. Click Finish.

   The Shipped Quantity field is only updateable when an ASN is being matched. The Received Quantity and Returned Quantity fields are updateable when a receipt is being matched.

To un-match shipments and receipts:

1. Navigate to the Advanced Shipment Notices and Receipts page.
2. Find your shipment or receipt.
3. Ensure that the Status is Matched.
4. Select your shipment or receipt and click Revert Matching.

Revert Receipt Match Page



5. Click Apply.

Managing Purchase Order Changes

Changes that occur in Oracle Procurement directly impact inbound deliveries in Oracle Transportation Execution. Changes to the ordered quantity, ship date, backordered quantity, and purchase order status will impact an inbound delivery.

> **Note:** The Transportation Arranged option, on the Purchase Order header, must be set to Buyer. If this option is changed on a blanket purchase order, the existing released orders will not be affected by the change.

The following general purchase order changes impact inbound deliveries in Oracle Transportation Execution:

- Unassigned line: If a line is unassigned from a purchase order, it will have null ship-from location, null routing request ID, and it will be marked as Not Eligible for Planning
- All lines unassigned: An exception is logged against the purchase order if all lines are unassigned
- Ordered quantity decrease: If the ordered quantity is decreased, Oracle Transportation Execution will decrease the requested quantity and increase the cancelled quantity
- Partially shipped lines: If a delivery line is partially shipped, the line will be split into two lines

Related Topics

Purchase Order Attribute Changes, page C- 1

Purchase Order Changes, page C- 3

4

Carrier Portal

This chapter covers the following topics:

- Overview
- Receiving and Responding to Load Tenders
- Entering Proof of Delivery Information
- Entering Freight Bills

Overview

The Oracle Transportation Execution Carrier Portal is a means for carriers to access information specific to shipments that are assigned to them. The portal enables carriers to receive and respond to load tenders, enter and update proof of delivery information, and enter and update freight bills.

Each carrier must have a username and password to be able to login to Oracle Transportation Execution Carrier Portal.

Receiving and Responding to Load Tenders

Load tendering involves transmitting a load tender request to a carrier and enabling a carrier to respond to the request by accepting or rejecting the request. The load tender request includes the characteristics of a delivery, such as origin and destination address, delivery weight, delivery volume, pickup delivery date and time requirements. The load tender request allows the carrier to view detailed pickup and delivery information.

After a tender has been sent to a carrier, the carrier must receive and either accept or reject the tender. The Carrier Response Portal is used by carriers to receive, accept, and/or reject tenders.

To receive a tender:

1. If you are the person (carrier) whose e-mail was entered in the Load tender email field, then you can click the link in your email to navigate to the Carrier Response Portal site.
2. Log on to the Carrier Response Portal to accept or reject the tender.

   To log on to the Carrier Response Portal without clicking on a direct link within a notification email, navigate to the Oracle Application and log in using the Oracle Transportation Carrier User responsibility.

3. In the search box, select either Tender Status or Tender Reference.
4. Search results are displayed. You can accept or reject the tender by clicking Accept or Reject.
5. If you click Accept, then, the Review and Submit page is displayed. Click Submit to submit the tender.

Entering Proof of Delivery Information

A Proof of delivery indicates the location, date and time of delivery, and the name of the individual receiving the delivery as well as the number of shipping units, weight and volume delivered. Any short or damaged quantities are also noted. Carriers provide proof of delivery through the Oracle XML Gateway (EDI) or by entering the data manually through the carrier portal within Oracle Transportation Execution.

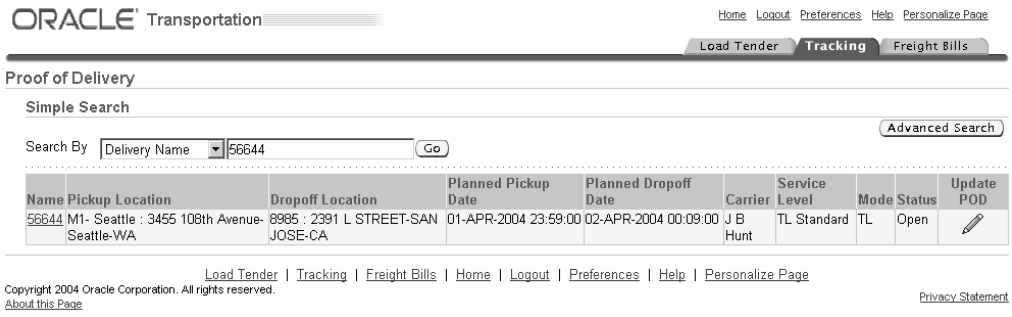
Each carrier must have a Username and Password to be able to login to Oracle Transportation Execution Carrier Portal and enter proof of delivery information.

When the carrier searches for bill of lading, delivery number, tracking number, or waybill number, they are only going to find those shipments that belong to them. For example, carrier XYZ logs into the Oracle Transportation Execution Carrier Portal and searches for bills of lading. The only bills of lading that are returned will be those bills of lading that belong to carrier XYZ.

To enter and update a proof of delivery:

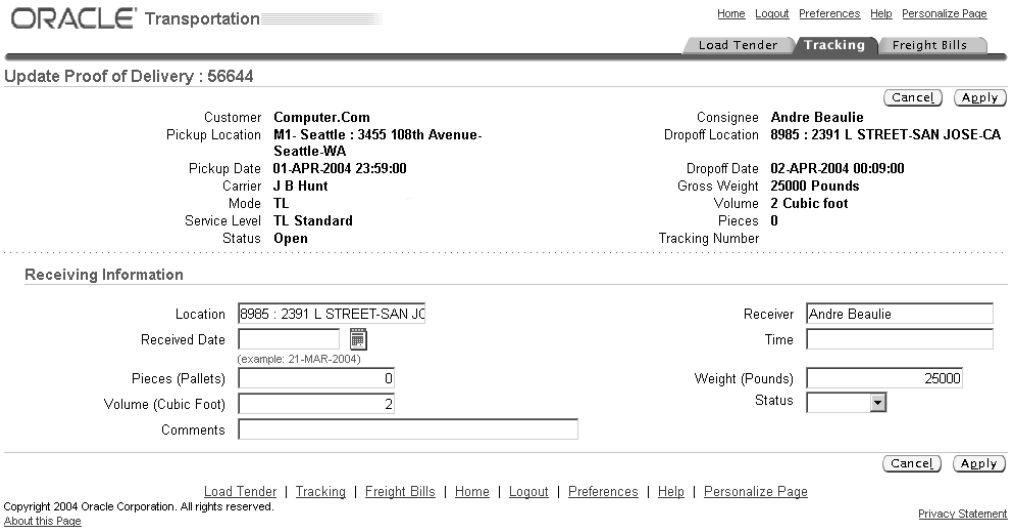
1. Navigate to the Proof of Delivery page.
2. Enter one of the following to find the shipment specific to your POD.
   - Bill of Lading
   - Delivery Number
   - Tracking Number
   - Waybill Number
3. Click Go.

Proof of Delivery Page



4. Click the Update POD icon.

Update Proof of Delivery Page



5. Update the following fields as needed:
   - Location
   - Received Date
   - Pieces (Pallets)
   - Volume
   - Comments
   - Receiver
   - Time
   - Weight
   - Status
6. Click Apply.

   You can update an existing proof of delivery at any time. However, if the proof of delivery that is being updated has the status of Delivered, then a Warning message will display, warning you that the existing delivery already contains proof of delivery information. By clicking Continue, the current information will overwrite existing information.

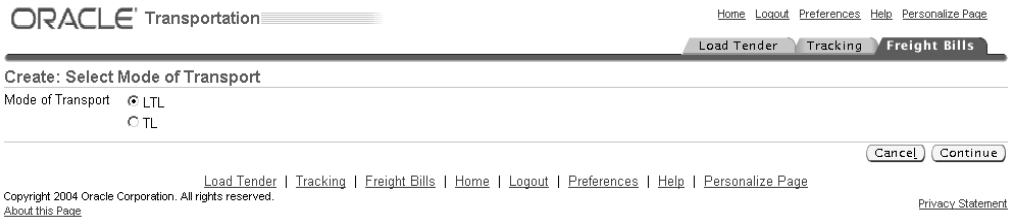
Entering Freight Bills

Each carrier must have a Username and Password to be able to login to Oracle Transportation Execution Carrier Portal and enter freight bill information.

To create freight bills:

1. Navigate to the Freight Bill Entry and Status page.
2. Click Create Freight Bill.

Create Freight Bill Page



3. Select the Mode.

   Note: You can only enter Less than Truck Load (LTL) or Truck Load (TL) freight bills.

4. Click Go.
5. Enter the Bill of Lading Number for the shipment.

   The Ultimate Dropoff Location, Carrier Name, SCAC Code, and Initial Pickup Location fields will all default based on the Bill of Lading Number that you enter.
6. Enter a Freight Bill Date.
7. Select a Freight Bill Type.
   - Original: If the freight bill is an original
   - Increment: If the freight bill is part of another freight bill
   - Replacement: If the freight bill is replacing another
8. Enter your Freight Bill Number.
9. Enter the Total Amount Due.
10. Enter a Freight Bill Reference if the Bill Type is Replacement or Increment.
11. Within the Freight Bill Lines region, click Add one row.
12. Optionally, enter a Discount Percentage or Amount.
13. If surcharges are used, click Add one row within the Surcharges region.
14. Click Apply.

A

Windows and Navigator Paths

This appendix covers the following topics:

- Overview
- Windows and Navigator Paths

Overview

This appendix shows the default navigator path for each Oracle Transportation Execution window. Refer to this appendix when you do not already know the path for windows you want to use.

Text in brackets ([]) indicates a button.

These abbreviations refer you to other Oracle Applications documentation:

- BOM: *Oracle Bills of Material User's Guide*
- Flex: *Oracle Applications Flexfields Guide*
- INV: *Oracle Inventory User's Guide*
- ONT: *Oracle Order Management User's Guide*
- SYS: *Oracle System Administrator's Guide*
- User: *Oracle Applications User's Guide*
- WSH: *Oracle Shipping Execution User's Guide*

Windows and Navigator Paths

The following table lists the default navigator path for each Oracle Transportation Execution window:

Window or Page	Navigator Menu Path
Advanced Shipment Notices and Receipts	Oracle Transportation Execution > Lines > Inbound Reconciliation
Delivery Workbench	Oracle Transportation Execution > Deliveries tab
Freight Bill Entry and Status	Oracle Transportation Execution Carrier Portal > Freight Bill
Freight Estimation	Oracle Transportation Execution > Carrier Services > Freight Estimation
Freight Payment and Audit	Oracle Transportation Execution > Freight Payment tab
Inbound Loaders	Oracle Transportation Execution > Admin tab > Inbound Loaders
Lines Workbench	Oracle Transportation Execution > Lines tab
Log Exceptions	Order Management > Shipping > Exceptions > [New]
Lookups	Order Management > Shipping > Setup > Lookups
Proof of Delivery	Oracle Transportation Execution > Deliveries > Delivery Details > (B) Proof of Delivery
Proof of Delivery (carriers)	Oracle Transportation Execution Carrier Portal > Tracking > Proof of Delivery
Rate Charts	Oracle Transportation Execution > Carrier Services > Rate Charts
Services	Oracle Transportation Execution > Carrier Services
Tracking	Oracle Transportation Execution > Deliveries > Tracking
Trips	Oracle Transportation Execution > Trips

B

Inbound Status Changes

This appendix covers the following topics:

- Inbound Status Changes
- Inbound Logistics Status per Event

Inbound Status Changes

This appendix illustrates the changes in delivery, delivery line, trip, and stop statuses during various events in the Inbound Logistics process both when a buyer is managing the inbound freight and when a supplier is managing inbound freight.

Inbound Logistics Status per Event

The following table illustrates the status of deliveries, delivery lines, trips, and stops during each Inbound Logistics event when a buyer is managing the inbound freight.

Event	Delivery Status	Delivery Line Status	Trip Status	Stop Status
At delivery lines build	Status: N/A Plan Flag: N/A Eligible for Planning: N/A	Status: X (Not Applicable) Eligible for Planning: No	Status: N/A Plan Flag: N/A Eligible for Planning: N/A	Status: N/A
Routing Request received and deliveries autocreated	Status: Open Plan Flag: Group Firm (Contents Firm) Eligible for Planning: Yes	Status: X (Not Applicable) Eligible for Planning: Yes	Status: N/A Plan Flag: N/A Eligible for Planning: N/A	Status: N/A
Routing Response sent, or Transportation Planning process updates delivery or delivery lines	Status: Open Plan Flag: Planned at least Eligible for Planning: N/A	Status: X (Not Applicable) Eligible for Planning: N/A	Status: Open Plan Flag: Planned (Trip Firm) at least Eligible for Planning: N/A	Status: Open
ASN received	Status: Intransit Plan Flag: Planned at least, if eligible for planning Eligible for Planning: N/A	Status: C (Shipped) Eligible for Planning: N/A	Status: Intransit Plan Flag: N/A Eligible for Planning: N/A	Closed
Physical receipt	Status: Closed Plan Flag: Planned at least, if eligible for planning Eligible for Planning: N/A	Status: L (Closed) Eligible for Planning: N/A	Status: Intransit / Closed (if all stops are closed) Plan Flag: N/A Eligible for Planning: N/A	Closed

The following table illustrates the status of deliveries, delivery lines, trips, and stops during each Inbound Logistics event when a supplier is managing the inbound freight.

Event	Delivery Status	Delivery Line Status	Trip Status	Stop Status
At delivery lines build	Status: N/A Plan Flag: N/A Eligible for Planning: N/A	Status: X (Not Applicable) Eligible for Planning: No	Status: N/A Plan Flag: N/A Eligible for Planning: N/A	Status: N/A
ASN received	Status: Intransit Plan Flag: Planned at least, if eligible for planning Eligible for Planning: No	Status: C (Shipped) Eligible for Planning: No	Status: Intransit Plan Flag: N/A Eligible for Planning: No	Closed
Physical receipt	Status: Closed Plan Flag: Planned at least, if eligible for planning Eligible for Planning: No	Status: L (Closed) Eligible for Planning: No	Status: Intransit / Closed (if all stops are closed) Plan Flag: N/A Eligible for Planning: No	Closed

C

Inbound Logistics Purchase Order Changes

This appendix covers the following topics:

- Inbound Logistics Purchase Order Changes
- Purchase Order Attribute Changes
- Purchase Order Changes

Inbound Logistics Purchase Order Changes

This appendix illustrates how the changes to a purchase order's attributes and a purchase order status affect the various steps in the Inbound Logistics process.

Purchase Order Attribute Changes

The following table shows how purchase order attribute changes affect each step of the Inbound Logistics process.

PO Change	Before Routing Req. Received	After Routing Req. Received	After Routing Req. was Generated	After Lines Shipped	After Lines Received
Ship-to location	Update lines.	Unassign lines from delivery, log exception against delivery, and change the ship to location.	Unassign lines from delivery, log exception against delivery, and change the ship to location. Also, log an exception against the delivery line.	No change on lines.	No change on lines.

PO Change	Before Routing Req. Received	After Routing Req. Received	After Routing Req. was Generated	After Lines Shipped	After Lines Received
Customer (drop ship only)	Update lines.	Unassign lines from delivery, log exception against delivery, and change the ship to location.	Unassign lines from delivery, log exception against delivery, and change the ship to location.	No change on lines.	No change on lines.
Freight term	Update lines.	Update lines(1).	Update lines(1).	No change.	No change.
Transportation Arranged from Buyer to Supplier	Update lines.	Unassign lines from the delivery and update lines.	No change on lines.	No change on lines.	No change on lines.
Transportation Arranged from Supplier to Buyer	Update lines.	N/A	N/A	No change on lines.	No change on lines.
Need by date/ promised date or Value of days early/ late receipt allowed	Update lines.	Update lines(2).	If need-by date has changed, log an exception against delivery and delivery line. Update lines(2).	No change on lines.	No change on lines.
Increment quantity	Update lines.	If there is a line without routing request, increment the quantity on that line, otherwise insert a new line.	If there is a line without routing request, increment the quantity on that line, otherwise insert a new line.	If there is a line without routing request, increment the quantity on that line, otherwise insert a new line.	If there is a line without routing request, increment quantity on that line, otherwise insert a new line.
Decrement quantity	Update lines.	(3)	(3)	(3)	(3)
All other attribute changes	Update lines.	Update lines.	Update lines.	Update lines.	Update lines.

1. When freight terms are updated on a line, make sure that delivery level freight term is synchronized. If all lines of a delivery have the same freight term, then the delivery is

updated with the freight term. If the delivery has lines with different freight terms, then delivery level freight term will be Null.

2.For date updates, if the delivery is assigned to a trip, check the planned arrival date of the last leg (corresponding to ultimate drop off location) of the delivery. If new values of the earliest delivery date are greater than the planned arrival date, or the new values of the latest delivery date are less than the planned arrival date, then log an exception against the stop. If the delivery does not have a last leg, if the new values of the earliest delivery date are greater than the ultimate drop-off date, or the new values of the latest delivery date are less than the ultimate drop off date, then log an exception against the delivery.

3. Decrement Quantity: First apply it to the lines that the routing request was not received on (in the ascending order of quantity) this might go over multiple lines. In the case where it goes over multiple lines, if the new requested quantity is zero, then mark the line as cancelled. Any left over quantity will be applied to the lines where a routing request was received as per the following rule: If all lines (with a routing request) have different ship from locations, then unassign all of them from the delivery and then apply the quantity change to the lines as per the rule described above. If all of the lines have the same ship from location, then apply the quantity change starting with the line that has the earliest pickup date (i.e. in the descending order of the earliest pickup date). If the routing response has been sent, then log an exception against the delivery and delivery line.

Purchase Order Changes

The following table shows how purchase order changes affect each step of the Inbound Logistics process.

PO Change	Before Routing Req. Received	After Routing Req. Received	After Routing Response is Sent	Delivery Line is In Transit	Delivery Lines Closed
Closed, Close for Receiving, Final Close	Close the delivery lines.	Close the delivery lines and unassign lines from the delivery.	Close the delivery lines and unassign lines from the delivery.	N/A	N/A The line is already closed.
Reopened	N/A	Reopen the delivery lines where the received quantity is null.	Reopen the delivery lines where the received quantity is null.	Reopen the delivery lines where the received quantity is null.	Reopen the delivery lines where the received quantity is null.
Purge	N/A	N/A	N/A	N/A	Lines are marked as Purged.

PO Change	Before Routing Req. Received	After Routing Req. Received	After Routing Response is Sent	Delivery Line is In Transit	Delivery Lines Closed
Receipt	Create a delivery, assign the received lines to the delivery. The lines might have to be split due to receipt. Mark the delivery lines received as Closed and mark the delivery as Closed. The lines that were split (new lines) will not be assigned to any delivery and will be marked as Not Eligible for Planning with null ship from.	The lines might have to be split due to receipt. Mark the delivery lines (that are received) as Closed. If all lines on the delivery are received, then mark the delivery as Closed.	Same as After Routing Request Received column.	Same as After Routing Request Received column.	N/A
ASN received	Create a delivery and assign the received lines to the delivery. The lines might have to be split due to receipt. Create an LPN if the material is packed, mark the delivery lines as shipped, and mark the delivery as In Transit.	The lines might have to be split due to receipt. Create an LPN if the material is packed. Mark the delivery lines as In Transit and mark the delivery as In Transit.	Same as After Routing Request Received column.	N/A	N/A

PO Change	Before Routing Req. Received	After Routing Req. Received	After Routing Response is Sent	Delivery Line is In Transit	Delivery Lines Closed
Receipt correction	N/A	N/A	N/A	N/A	The quantity is decreased. Decrease received quantity on Closed line. Increase the requested quantity on an Open line (or create a new line). Increase received quantity on Closed line.
ASN cancellation	N/A	N/A	N/A	Shipped quantity is changed to 0, the delivery status is changed to Open, and the delivery line status is Not Pickable (Open). Unpack the items if they were packed and delete L PNs and leave split lines.	N/A

PO Change	Before Routing Req. Received	After Routing Req. Received	After Routing Response is Sent	Delivery Line is In Transit	Delivery Lines Closed
Return to Vendor (RTV) correction	N/A	N/A	N/A	N/A	Increase the returned quantity and create a new line for the overage. Decrease the RTV quantity and decrease the requested quantity from the Open line if the requested quantity equals the RTV correction quantity.
PO cancelled	Mark lines as cancelled. Update the requested quantity to 0 and update the cancelled quantity to the original ordered/ requested quantity.	Mark lines as cancelled if they are completely cancelled. Update the requested quantity to 0 and update the cancelled quantity to the original ordered/ requested quantity. Unassign the line from the delivery.	Same as After Routing Request Received column.	N/A	N/A

The following table shows how purchase order changes affect Oracle Transportation Planning steps of the Inbound Logistics process.

PO Change	After Snapshot, Before Transportation Planning has Released the Plan	After Transportation Planning has Released the Plan
Closed, Close for Receiving, Final Close	Close the delivery lines and unassign the delivery lines from the delivery.	Close the delivery lines and unassign the delivery lines from the delivery.
Reopened	Reopen the delivery lines where the received quantity is null.	Reopen the delivery lines where the received quantity is null.
Purge	N/A	N/A
Receipt	The lines might have to be split due to receipt. Mark the delivery lines (that are received) as Closed. If all lines on the delivery are received, then mark the delivery as Closed.	Same as in After Snapshot, Before Transportation Planning has Released the Plan column.
ASN received	The lines might have to be split due to receipt. Create an LPN if the material is packed. Mark the delivery lines as In Transit and mark the delivery as In Transit.	Same as in After Snapshot, Before Transportation Planning has Released the Plan column.
Receipt correction	N/A	N/A
ASN cancellation	N/A	N/A
Return to Vendor (RTV) correction	N/A	N/A
PO cancelled	Mark lines as cancelled if they are completely cancelled. Update the requested quantity to 0 and update the cancelled quantity to the original ordered/ requested quantity. Unassign the line from the delivery.	Same as in After Snapshot, Before Transportation Planning has Released the Plan column.

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