Table of Contents

Objective

This Job Aid explains how to assign a Carrier (Freight Forwarder) and Freight Purchase Order to a Freight Order and send details through the Electronic Data Interchange (EDI) system to an external partner (with EDI capability) who has been assigned as a Carrier to a Freight Order.

* *

Overview

The TM STO Transportation Planner (TS.07) or TM STO Freight Procurement (TS.08), in **Non-DAP** Incoterm scenarios, is required to:

1. Assign a Carrier (Freight Forwarder) to the Freight Order
2. Send **Freight Order details** to the assigned Carrier
3. Check and track **Events** received from the Carrier

In addition, for vendor managed legs (In Incoterm scenarios like DAP, FCA, etc.), it is also required to track events received from the goods vendor for each freight order.

The **EDI** system adds the following features to TM:

- It automatically sends Freight Order Details from TM to the assigned Carriers once a day
  - o It also allows users to manually send Freight Order Details from TM to the Carrier

- It automatically receives in Umoja TM, the event details submitted in the Goods Vendor/Carrier's system that is EDI enabled for the UN.
  - o Vendors/Freight Forwarders can send all expected and unexpected events along with attachments through their EDI enabled system.

  - o Vendors/Freight Forwarders using EDI are no longer required to use Carrier Collaboration Portal (CCP) or offline communication.

  - o Vendors /Freight Forwarders must be aware that the proof of delivery is the last event and after that, no further events can be sent by them.

Notes:

- Freight orders with dummy carrier (unassigned) or with *any_port* as source or destination location cannot be sent through EDI.

- It is not enough if the Goods Vendor/Carrier uses EDI with other clients. A technical connection/testing process with Umoja is required to qualify for TM-EDI.

Enterprise Role(s)

| Role ID	Role Name
TS.01	TM Transportation Planner
TS.02	TM Manage Freight Order
TS.07	TM STO Transportation Planner
TS.08	TM STO Freight Procurement

Procedure

CARRIER ASSIGNMENT

1. Connect to TM
2. Click on Freight Order Management tab:

3. Search for Freight Orders you want to work on by typing the Freight Order number and clicking on "apply".

4. Once the Freight Orders appear below, select all the Freight Orders to assign a Carrier (freight forwarder) to and click on the subcontracting button:
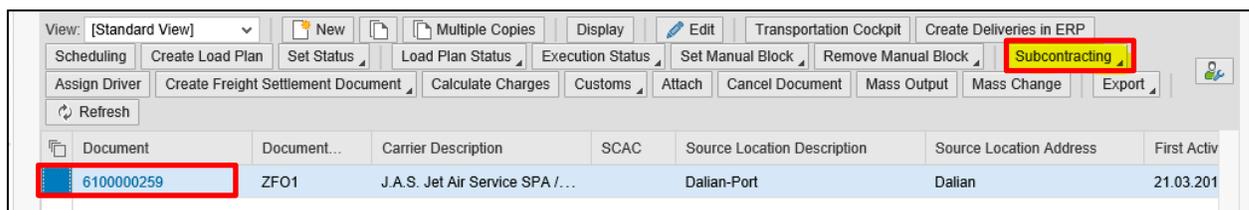
5. A list of options will appear.
6. Click on assign Carrier and SRM freight PO:
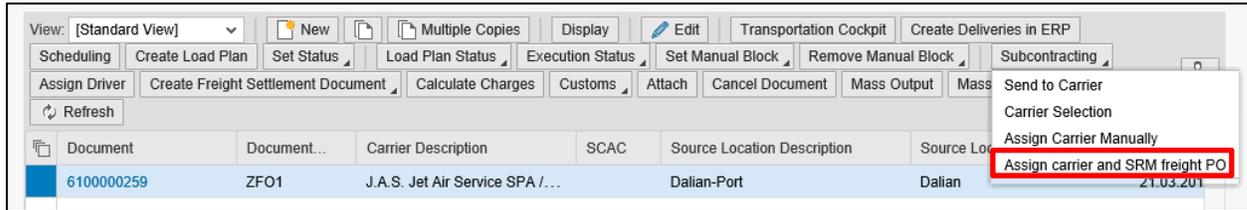
7. A popup window will appear, please fill the Business Partner (BP number) of the Carrier (Freight Forwarder) and the SRM Freight PO. For the Carrier, you can also click on the matchbox next to 'carrier' and search for the business partner by clicking "search" and select the carrier. Once filled, Click 'ok':
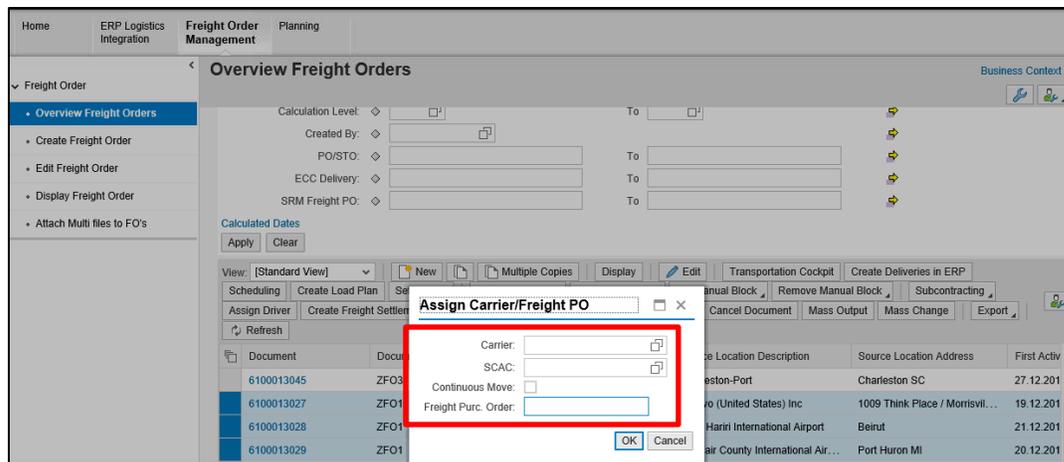
8. Click refresh and confirm that "Carrier description" column has changed:


Note: If there is a need to update the carrier, simply perform the same action again and the new carrier details will override the previous one. Once the carrier is assigned, the system will automatically send the details to the Carrier. There is a batch process that performs this task once a day.
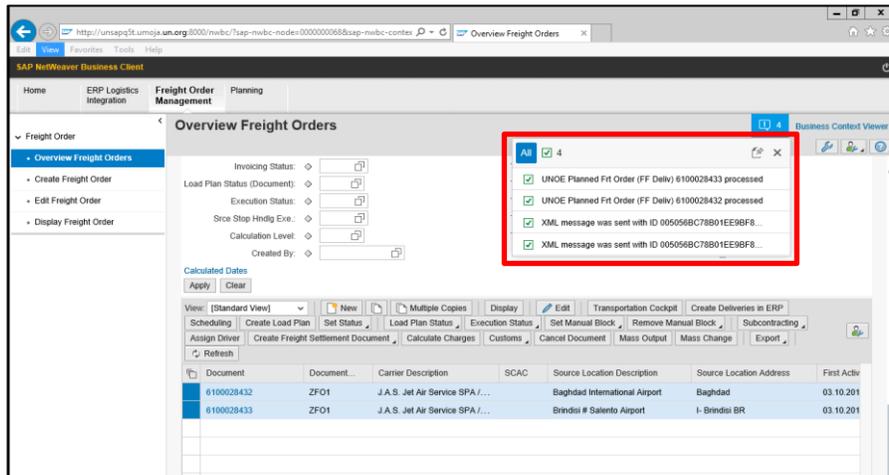
This task can be performed manually without waiting. Follow the next steps:

SENDING FREIGHT ORDER DETAILS MANUALLY

9. Select all Freight Orders
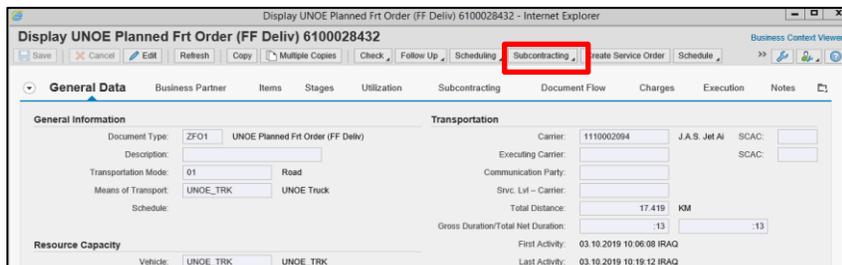10. Click on subcontracting
11. Click on send to Carrier:
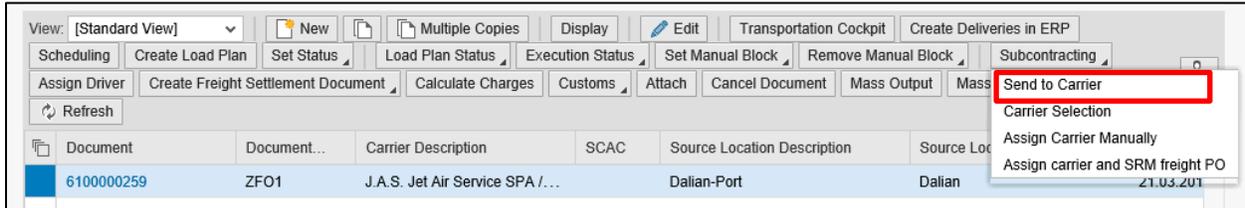
12. Select Ok in the pop-up window.
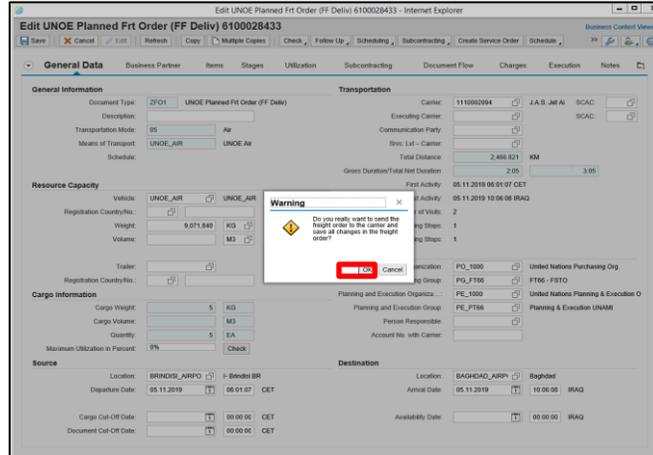13. The dialog box on top will confirm that XML files were sent to the Carrier:

The action of "sending Freight Order details manually" can also be performed from a specific Freight Order window:
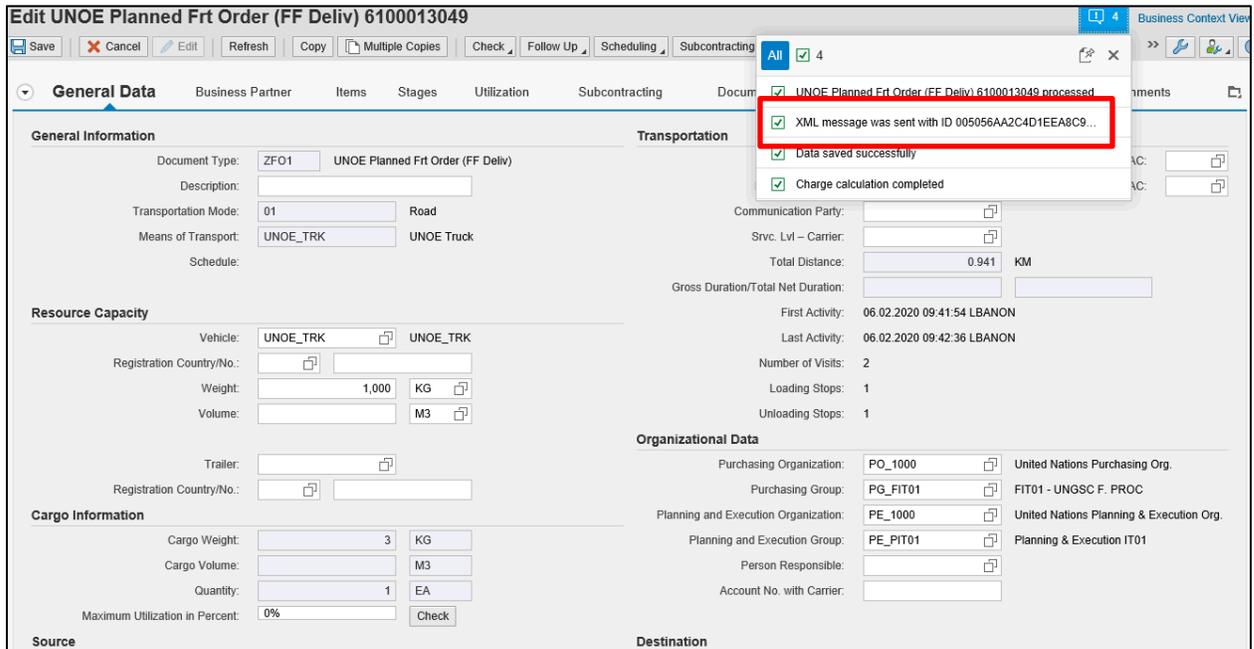
14. Open the Freight Order
15. Click on Edit

16. Click on Subcontracting

17. Click on "send to Carrier" under the subcontracting icon on the top menu. Click "ok" in the pop-up dialog box:
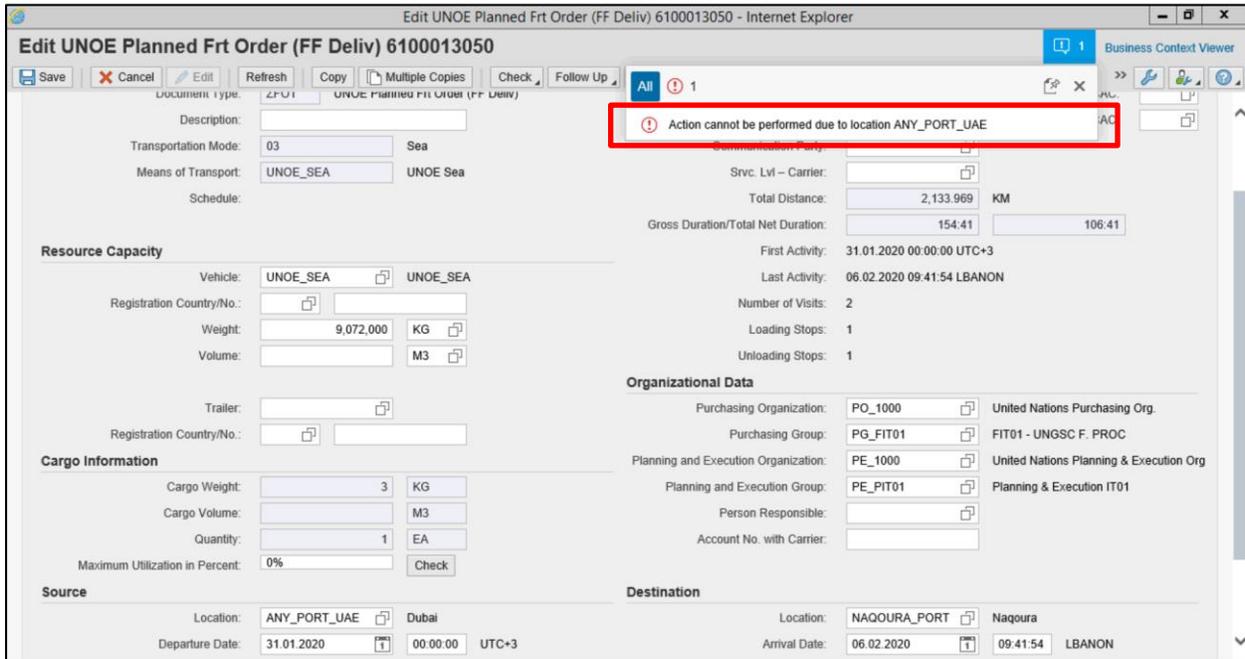

18. You will see the confirmation on the right-hand corner that the xml file was sent:
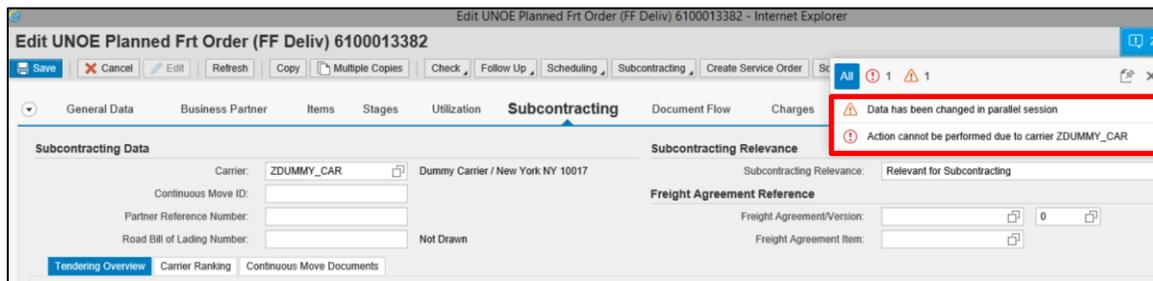
Exceptions

A. In case of any_port source or destination, the below error will be seen in the upper right corner when you click on "send to Carrier" under the subcontracting icon in Edit mode:

B. In case of dummy_carrier, the below error will appear if you click on "send to Carrier" under the subcontracting button in Edit mode:

Revision History (Soft Copy only)

Date	Version	Prepared by	Description
10 January 2020	1	TM Project Team	Version 1