



Best Practice idea

October 2017

Objective – Improve data collection process

Goal of Lean Manufacturing:

- **Model all the steps in process**
- **See what adds value**
- **Eliminate waste**



Technology Improvement – Show Me...

- **We're a smaller, conservative company in the Midwest.**
- **We have several ongoing technology programs including**
 - **Vusion, Expert Fuel, Scorecarding, Warehousing & Maintenance Software upgrades, OCR technologies,**
- **For our size and staffing levels, Information Overload is a concern...**
- **The mobile app technology was driven by our IT staff and fell under the radar of a true “software technology” but even in it's simpleness, it is changing the way we do business every day.**
- **It is helping us reduce waste and add value to our processes.**



Problem – Re-handled Data

Manual processes in collecting load specific data

- To pay drivers
- To bill customers

Lots of paper

Numerous people touching the same document

Time & workflow delays



Old Process – Lots of sorting & categorizing...

- **Driver picked up the bol at point of delivery**
- **Documents collected and sent via overnight mail (at End Of Week)**
- **Payroll Clerk received documents the next week**
- **Numerous Documents - hand sorted**
 - **bols – needed for Driver Pay & Customer Invoicing**
 - **Inspection info, Paper logs – went to Safety**
 - **fuel receipts, scale tickets, etc. – to the fuel desk**
 - **repairs, inspections – to Maintenance**
 - **Demurrage – to fleet managers**



Old Process – Driver Pay & Scanning

- **Payroll Clerk – had to hand matched documents**
 - Manually searched Trip Tracer to locate trip
 - Matched BOL to Freight Bill
 - Then, verified info & notes and put FB # on the BOL paper copy
 - Set up driver pay
 - Sent newly matched documents to be scanned by another person
- **Scan Desk**
 - Scanned documents into EBE
 - Indexed to freight bill (in Customer Service)
 - Approved the FB for Invoicing
 - Other trip data had to be scanned or forwarded to
 - HR
 - Shop
 - Fleet Managers
 - Safety



Solution - Loaddocs Workflow App

- **Mobile App technology is changing the data collection process.**
- **The Driver**
 - Logs into the phone app
 - Enters the Freight Bill number from his People-net screen
 - Choses category of document to be uploaded
 - Takes a picture
 - Hits send
- **The Company**
 - Receives the info instantly
 - Categorized documents are opened, indexed and assigned in one step
 - (Using a FB watermark)



How Loaddocs changes the data collection process

- **For Payroll, a mobile app**
 - Eliminates waiting for information / courier delays
 - Reduces mid-week processing bottlenecks
 - Greatly reduces document identification / sorting / & matching
 - Eliminates misplaced document issues
- **For Billing**
 - Documents arrive watermarked with a freight bill number
 - Bols can quickly be
 - Indexed to originating Freight bill
 - Compared for accuracy, and
 - Approved for billing
 - This allows for faster billing or even auto-billing
- **Scan Desk**
 - Eliminated
- **Other Departments**
 - Documents come in real time, indexed & desktop accessible

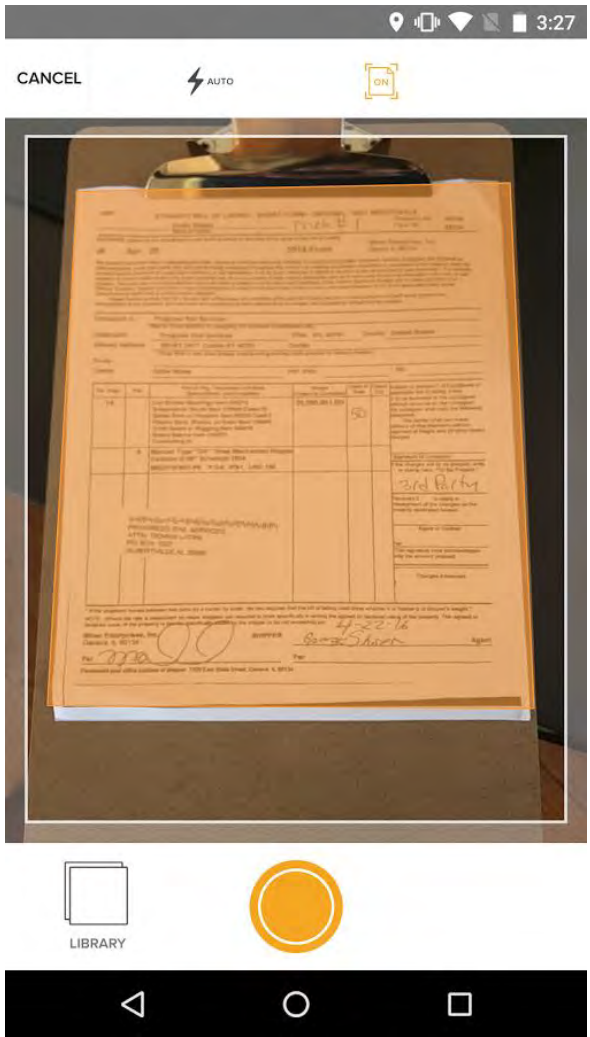


Driver captures image using his/her smartphone and types in the Freight Bill number

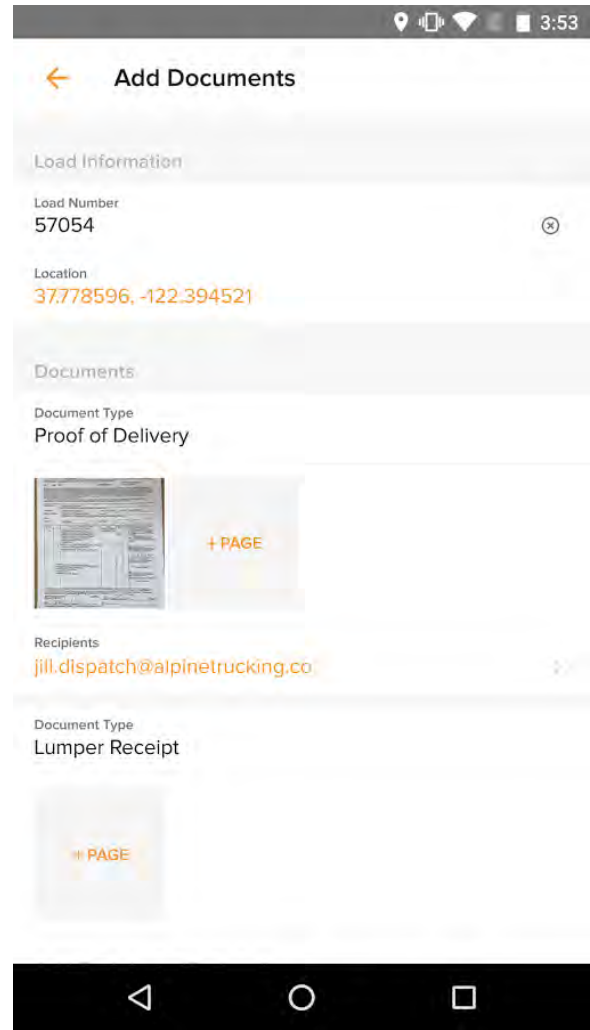
Get the Freight Bill



Take a Picture



Attach & Send



How Loaddocs changes the data collection process

- **For the Driver**
 - Information is entered at the point of delivery
 - Driver is most familiar with the paperwork, so fewer mistakes
 - Driver doesn't have to drive to find a Fedex drop off station
 - Retains paperwork for 90 days and then disposes
- **For the Company**
 - Courier services are eliminated
 - Driver "lost" documentation issue is eliminated
 - Physical documents can be eliminated
 - Manual, time consuming BOL to Freight bill searches are eliminated
 - Information comes in pre-scanned and categorized
 - No manual sorting / resorting
 - Information is real time



The Savings

Additional cost / benefit of the technology <i>(when fully implemented)</i>	<u>Monthly</u>
– Driver based @ \$17 / month	\$-1,900
– Fedex savings estimate <i>(110 drivers x \$15 / wk x 4.3 wks / month)</i>	\$+7,100
– Reduced weekly office time <i>(10 hrs / week x \$25 x 4.3 wks / month)</i>	\$+1,075
– Monthly Savings	\$+,6,275



Why Loaddocs?

- **Cheaper than our current Indexing system**
 - **Driver based vs. a per load charge**
 - Cost benefit of an alternative EBE app was marginal
 - LD will save us an additional \$4,800 / yr
 - Pricing is “all inclusive”
- **More Flexible**
 - **Smaller company**
 - **Open to customer driven changes**
 - Allowed us to set our own driver expense categories
 - Button for customer driven concerns / improvement ideas
 - **Scanned documents are able to be filtered and sorted**
 - (searchable by driver, category, time, date, location)



Mobile App / Loadoc Weaknesses

- **Concerns**
 - **Some documents have to be re-imaged**
 - **Shippers often have low quality BOL printers**
 - (LD has an good image edit feature that helps on lower quality pictures)
 - Future add-on OCR capabilities may reduce # of sub-quality images
 - **Drivers sometimes struggle with taking pictures on their phones**
 - **Incorrect Freight Bill numbers can be used by the driver**
 - **Driver has to know the correct freight bill & also has to enter it correctly**
 - **Scripts may help the driver enter the correct data**
 - Time of delivery, date delivered, truck number, location can be cross checked with peoplenet
 - **OCR technology**



Loaddoc Competitors?

- **Transflow**
 - Largest mobile document submission company
 - Most expensive
- **EBE**
 - Very integrated into our system
 - Currently has all the options for this technology
 - Well established
 - However, everything is bolt-on
 - Extra for integration, OCR, Mobile App, AP features
- **Loaddocs**
 - 1 price / user, all inclusive



Loaddoc – Future Uses

- **Automated indexing using API Integration (Application Program Interface)**
 - Ability to send data directly to Customer Service Module and bypass costly EBE interface
- **OCR capabilities may soon be standard features.**
 - (Currently bolt on with EBE)
- **Buildable e-forms are being developed**
 - “Demurrage” form would allow driver to put info in and have shipper sign directly on the driver’s phone



Loaddoc – Summary

Loaddocs is transforming the way we do business.

- **Ease of use**
- **Less expensive than other workflow programs**
- **Customizable with filtering capabilities**





BUCHHEIT

LOGISTICS

MILES BEYOND EXPECTATIONS