



POTTLE'S

Welcome Home to Pottle's

Our Best Practice: Automated Verifications

The Problem

Too many "error catching" reports not being looked at and issues not being fixed.

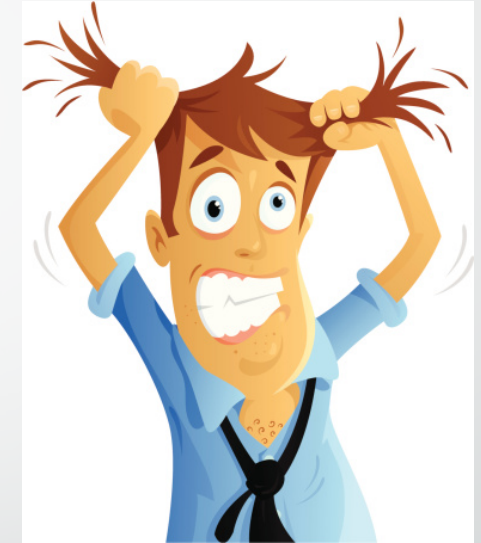
Goals



- Reduce multiple reports that were not being looked at
- Create one “valuable” report that everyone looks at
- Correct errors earlier in the business process flow
- Improve internal business efficiency
- Reduce invoicing errors
- Improve payment cycle

Reports Before...

- Orders with no fuel surcharge
- Orders with \$0.01 in an Other Charge item
- Orders with 'DET' Other Charge item
- Orders with wired Lumper amount not billed
- Orders with LINEHAUL but no Auto Rate OR Rate Confirmation image
- Movements in progress with NO trailer
- Driver missing Fleet Manager
- Tractor missing Dispatcher
- Tractor missing Allocation Code
- Tractor missing Fleet
- Unmatched Driver Type and Allocation Code
- Orders to be billed missing required documents
- Orders with required documents waiting to be billed



And After...

Consolidated into 2 reports:

- Billing Pre-Post Verification Report
- Operations Verification Report

Example Operations Report

Operations User: JRODRIGUEZ

Order #	Customer ID	Delivery Date	Type	Warning / Error Message
0806875	SAPPWEME	09/27/2017	Delivered	Linehaul missing

Error Messages: 1

Operations User: MFORTIER

Order #	Customer ID	Delivery Date	Type	Warning / Error Message
0805700	SWIFPHA1	09/27/2017	Delivered	Linehaul missing
0805700	SWIFPHA1	09/27/2017	Delivered	Linehaul not auto rated or missing rate confirm.

Error Messages: 2

Example Billing Pre-Post Report

Pottles Transportation, LLC

Billing Pre-Post Verification

09/28/2017 0850

Order #	Customer ID	Bill Date	Type	Warning / Error Message
0805468	STCRBAME		Invoice	Order with zero pieces and/or weight
0806338	STCRBAME		Invoice	Order with zero pieces and/or weight

Design Details

- Designed in a manner where additional business rules may be added to the SQL statement and not require changes to the report
- Frequency: DAILY
- Similar reports run at the end of each day for Management to ensure all issues are being addressed appropriately.

Result



- Teams correcting issues more quickly
- Staff held more accountable
- Very few invoicing errors



Thank you for your time.

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