

[CRM-174] [Claims] UT Disputes Process Created: 06/12/23 Updated: 11/09/23

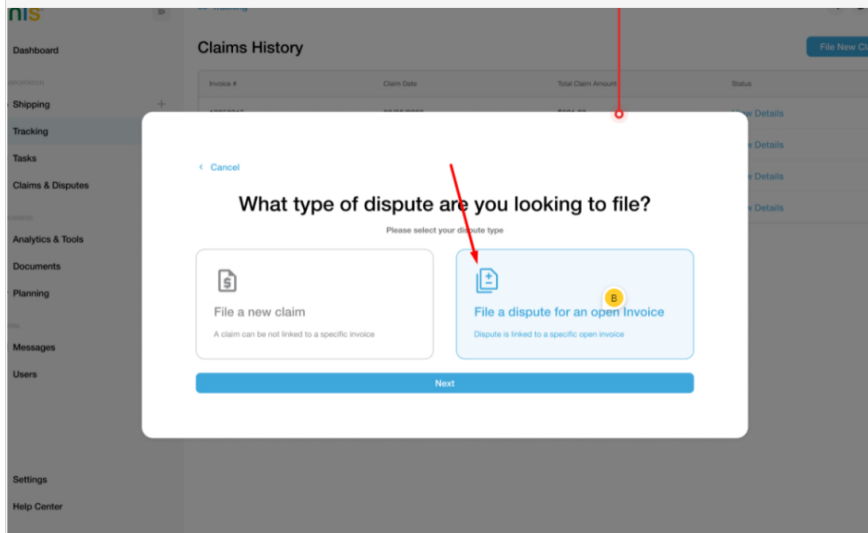
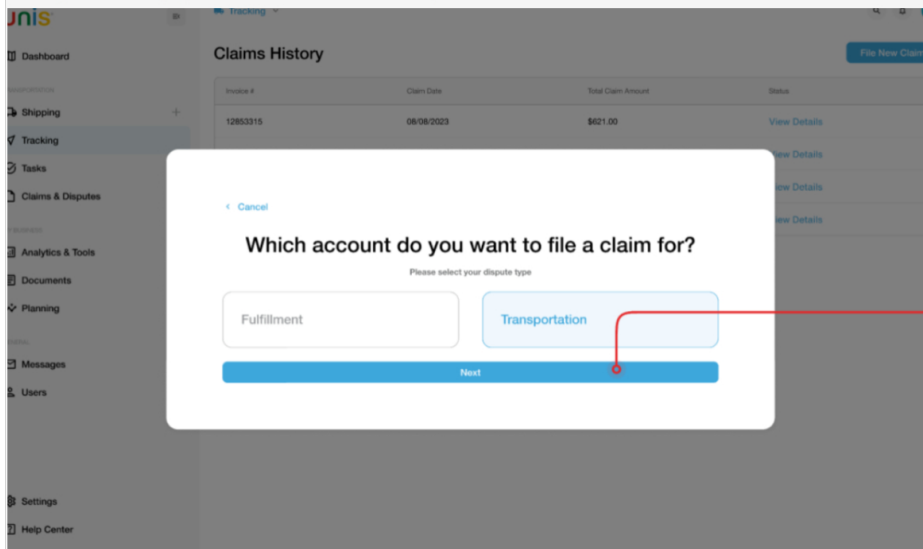
Status:	New		
Project:	CRM		
Component/s:	None		
Affects Version/s:	None		
Fix Version/s:	None		
Type:	Story	Priority:	Major
Reporter:	Bassel Matta	Assignee:	Bryan Huang
Resolution:	Unresolved	Votes:	0
Labels:	Claims, UT_Disputes		
Remaining Estimate:	Not Specified		
Time Spent:	Not Specified		
Original Estimate:	Not Specified		
Attachments:			
Issue Links:	<p><b>Blocks</b></p> <p>is blocked by <a href="#">ESR-24</a> [Claims] - Add Claim Closed</p> <p><b>Relates</b></p> <p>relates to <a href="#">ESR-9</a> [Claims] Claims &amp; Disputes - Master Closed</p>		
Story Points:	0		
Test Hours:	0		
Sprint:	CSR Support-1020-1102		
Dev Hours:	0		

#### Description

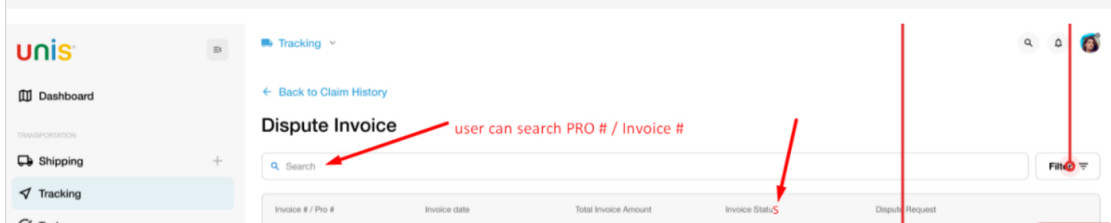
If user select "Transportation" then "Dispute":

Note: if the customer is just a "TMS" customer" then they will not be asked if the claim is for Transportation or fulfillment.

We will only show the following page if the customer has both accounts with us, transportation and fulfillment.



The user will then see all the PRO # and orders they have on their TMS account. We will grab all this data from TMS.



Claims & Disputes

MY BUSINESS

Analytics & Tools

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Help Center

12853315	06/06/2023	\$621.00	Draft	Dispute	View Existing
12853316	07/18/2023	\$184.00	Open	Dispute	
12853317	05/01/2023	\$322.00	Posted	Dispute	
12853318	04/25/2023	\$1145.00	Closed	Dispute	

Grab all this data from TMS invoice or BNP.

shows the most recent invoices that the user have purchased or submitted on their TMS account.

Clicking "Dispute" will allow the user to file a new dispute for this Invoice #. It means that this Invoice didnt have any previous disputes in the system.

If the "View Existing" button is shown, it means that this invoice has an existing dispute. And clicking on this, it will allow the user to see the status for the current open dispute for this invoice.

Clicking "Filters" will allow the user to only see certain types of invoices:

unis

Dashboard

TRANSPORTATION

Shipping

Tracking

Tasks

Claims & Disputes

MY BUSINESS

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Help Center

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Back to Claim History

Dispute Invoice

Search

Invoice # / Pro #	Invoice date	Total Invoice Amount	Invoice Status	Dispute Request
12853315	06/06/2023	\$621.00	Draft	Dispute View Existing
12853316	07/18/2023	\$184.00	Open	Dispute
12853317	05/01/2023	\$322.00	Posted	Dispute
12853318	04/25/2023	\$1145.00	Closed	Dispute

Filter

☐ Draft
 ☐ Open
 ☐ Posted
 ☐ Closed
 ☐ Paid

Clicking "Dispute" will allow the user to file a new dispute for this invoice. Even if the invoice has a previous dispute, we will allow the user to file a new dispute because maybe they want to dispute a different item line from what they already have.

unis

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File New Dispute

Invoice # 12853315

Quantity #	Line Item Description	Rate	Amount	Dispute Amount	Dispute Reason
27.00	Accessorial roaction	23.000	\$621.00	\$100.00	
46.00	Stretch Wrap	4.00	\$184.00	\$100.00	Base Rate
90.00	Plastic Strapping	3.5000	\$322.00	\$322.00	Accessorial
229.00	Corner Board	5.000	\$1145.00	\$500.00	Fuel Surcharge
Total Approved Amount				\$700.00	Others

Attachments (Please submit invoices related to the case)

Drop your files here or browse

Maximum size: 50MB

Submit Dispute

Grab all this data from TMS or BNP from that specific invoice.

user box to type in the amount that they want from us.

Select

Allow user to upload documents as proof

This cannot be selected because it means that a dispute has been opened for it in the past.

Allow user to select from dropdown menu. If "Others" is selected, then allow the user to enter in a box the reason. Make it optional.

Clicking "View Existing" will show the user the existing disputes that have been created:

unis

Dashboard

Tracking

Back to Claim History

this is requested by the customer

set by internal user

this will be the amount approved by the internal user in BNP.

**Invoice #12853315**

invoice data from BNP/TMS Auto

Line Item Description	Claim Date	Claim Amount	Status	Approved Amount	Approval/Denial Reason
Accessorial reaction	06/06/2023	\$621.00	Pending	\$00.00	
Stretch Wrap	07/16/2023	\$184.00	In Progress	\$00.00	
Plastic Strapping	05/01/2023	\$322.00	Denied	\$00.00	No proof of damage
Corner Board	04/25/2023	\$1145.00	Approved	\$1100.00	
Total Approved Amount					

Attachments (Please submit invoices related to the case)

Drop your files here or browse Maximum size: 50MB

Upload File

user can upload more documents if they are missing any documents.

This is a note from internal user from BNP to notify the customer of the reason, and ask the customer for any extra documents.

Once the user clicks on the dropdown menu they will be able to select the type of document they are uploading.

If the user clicks "Submit Dispute", the dispute will be submitted and sent to us in BNP to the appropriate department.

**Tracking**

Back to Claim History

**Invoice #12853315**

Quantity #	Line Item Description	Rate	Amount	Dispute Amount	Fax	Dispute Reason
27.00	Accessorial reaction	23.000	\$621.00	\$100.00	<input type="checkbox"/>	Base Rate
46.00	Stretch Wrap	4.00	\$184.00	\$100.00	<input checked="" type="checkbox"/>	
92.00	Plastic Strapping	3.5000	\$322.00	\$322.00	<input checked="" type="checkbox"/>	
229.00	Corner Board	5.000	\$1145.00	\$000.00	<input checked="" type="checkbox"/>	
Total Dispute Amount				\$1145.00		

Attachments (Please submit invoices related to the case)

Drop your files here or browse Maximum size: 10MB

Uploaded file

Claim-1.pdf

Claim-2.pdf

Claim-3.pdf

Claim-4.pdf

Document Type

Bill of Lading

Invoice

Purchase Order

Pricing Agreement

Remove

Remove

Remove

Remove

Submit Dispute

Map each document uploaded to the document type.

Dont allow the user to submit dispute unless they select one of the options from the dropdown menu.

On the dropdown menu of document types:

- Bill of Lading
- Invoice
- Inspections Certificate
- Purchase Order
- Pricing Agreement
- Other

The Red "Remove" button on the right side will allow the customer to delete the document that they have uploaded.

Then dispute will be submitted once the user clicks "Submit Dispute"

**Tracking**

Back to Claim History

**File New Dispute**

Invoice # 12853315

Quantity #	Line Item Description	Rate	Amount	Dispute Amount	Fax	Dispute Reason
27.00	Accessorial reaction	23.000	\$621.00	\$100.00	<input type="checkbox"/>	Compliance Charge
46.00	Stretch Wrap	4.00	\$184.00	\$100.00	<input checked="" type="checkbox"/>	
92.00	Plastic Strapping	3.5000	\$322.00	\$322.00	<input checked="" type="checkbox"/>	
229.00	Corner Board	5.000	\$1145.00	\$000.00	<input checked="" type="checkbox"/>	

Attachments (Please submit invoices related to the case)

Drop your files here or browse Maximum size: 10MB

Uploaded file

Claim-1.pdf

Claim-2.pdf

Claim-3.pdf

Claim-4.pdf

Document Type

Bill of Lading

Invoice

Purchase Order

Pricing Agreement

Remove

Remove

Remove

Remove

Submit Dispute

Claim Submitted Successfully

Thank you for submitting your claim. Rest assured, our team is reviewing it and will get back to you within the next 48 hours.

Done

once clicked, it will redirect the user to see all the disputes and claims they have. Go back to the claims main page showing all claims and disputes history.

When a dispute has an update from the BNP team, then it will show:

Tracking

[Back to Claim History](#)

### Invoice #12853315

Line Item Description	Claim Date	Claim Amount	Status	Approved Amount	Approval/Denial Reason
Accessorial roaction	08/08/2023	\$621.00	Pending	\$00.00	
Stretch Wrap	07/18/2023	\$184.00	In Progress	\$00.00	
Plastic Strapping	05/01/2023	\$322.00	Denied	\$00.00	No proof of damage
Corner Board	04/25/2023	\$1145.00	Approved	\$1100.00	
Total Dispute Amount				\$1145.00	

Attachments (Please submit invoices related to the case)

Drop your files here or browse

Maximum size: 50MB

Download Template

Upload file

internal user updates these

The user get to this page after clicking:

Tracking

[Back to Transit Time Search](#)

### Dispute Invoice

Search

Filter

#### Most Recent Invoices

Invoice #	Pro #	Invoice date	Total Invoice Amount	Invoice Status	Dispute Request
12853315		08/08/2023	\$621.00	Draft	Dispute <div>View Existing</div>
12853316		07/18/2023	\$184.00	Open	Dispute
12853317		05/01/2023	\$322.00	Posted	Dispute
12853318		04/25/2023	\$1145.00	Closed	Dispute

The user get to this page also after clicking:

#### Most Recent Invoices

Invoice #	Claim Date	Status	Total Claim Amount	Status
12853315 <div>New</div>	07/18/2023	Dispute	\$621.00	View Details
12853316 <div>Update</div>	05/01/2023	Dispute	\$184.00	View Details
12853317	04/25/2023	Claim	\$322.00	View Details
12853318	04/25/2023	Claim	\$1145.00	View Details

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