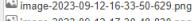
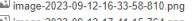
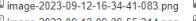
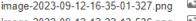
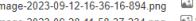
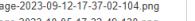
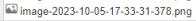
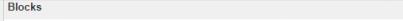


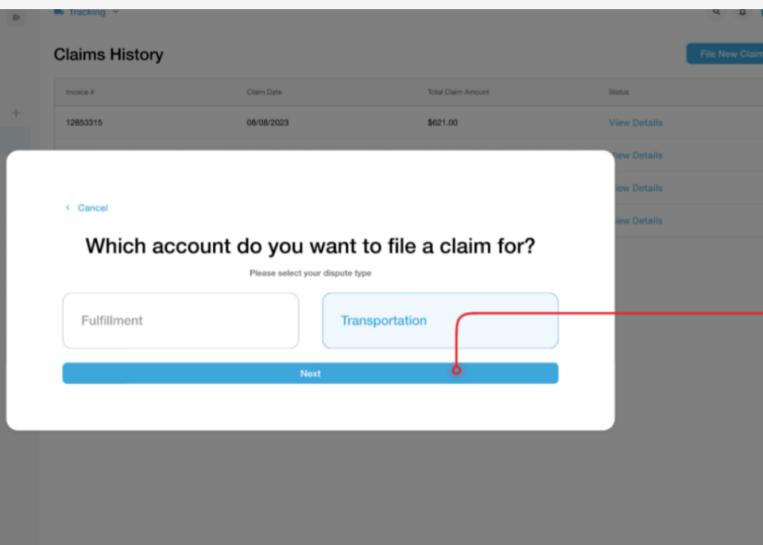
[CRM-174] [Claims] UT Disputes Process <small>Created: 09/12/23 Updated: 11/09/23</small>			
Status:	New	Priority:	Major
Project:	CRM	Assignee:	Bryan Huang
Component/s:	None	Votes:	0
Affects Version/s:	None		
Fix Version/s:	None		
Type:	Story	Priority:	Major
Reporter:	Bassel Matta	Assignee:	Bryan Huang
Resolution:	Unresolved	Votes:	0
Labels:	Claims, UT_Disputes		
Remaining Estimate:	Not Specified		
Time Spent:	Not Specified		
Original Estimate:	Not Specified		
Attachments:	            		
Issue Links:	Blocks: is blocked by GSR-24 [Claims] - Add Claim Relates: relates to GSR-9 [Claims] Claims & Disputes - Master		
Story Points:	0		Closed
Test Hours:	0		Closed
Sprint:	CSR Support-1020-1102		
Dev Hours:	0		

Description

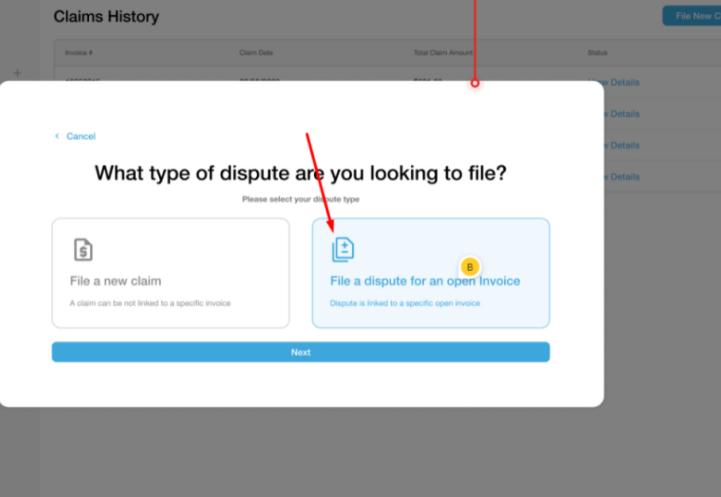
If user select "Transportation" then "Dispute":

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.

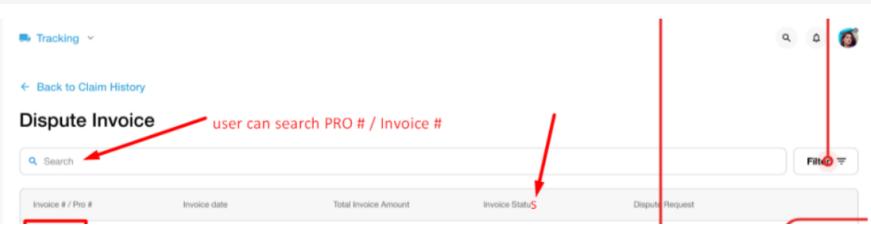


The screenshot shows a 'Claims History' page with a modal overlay. The modal title is 'Which account do you want to file a claim for?'. It contains two options: 'Fulfillment' and 'Transportation'. The 'Transportation' option is highlighted with a red box and a red arrow pointing to it. Below the options is a 'Next' button.



The screenshot shows a 'Claims History' page with a modal overlay. The modal title is 'What type of dispute are you looking to file?'. It contains two options: 'File a new claim' and 'File a dispute for an open invoice'. The 'File a dispute for an open invoice' option is highlighted with a red box and a red arrow pointing to it. Below the options is a 'Next' button.

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



The screenshot shows a 'Dispute Invoice' page. At the top, there is a search bar with the placeholder 'Search PRO # / Invoice #'. Below the search bar is a table with columns: 'Invoice # / Pro #', 'Invoice date', 'Total Invoice Amount', 'Invoice Status', and 'Dispute Request'. A red arrow points to the 'Invoice # / Pro #' column header. Another red arrow points to the search bar.

Claims & Disputes

MY BUSINESS

Analytics & Tools

Documents

Planning

GENERAL

Messages

Users

Settings

Help Center

12853315 08/08/2023 \$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 didn't 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

Analytics & Tools

Documents

Planning

GENERAL

Messages

Users

Settings

Help Center

Tracking

Back to Claim History

Dispute Invoice

Search

Invoice # / Pro # Invoice date Total Invoice Amount Invoice Status Dispute Request View Existing

12853315	08/08/2023	\$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

Dashboard

TRANSPORTATION

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Back to Claim History

File New Dispute

Invoice # 12853315

Quantity #	Line Item Description	Rate	Amount
27.00	Accessorial noaction	23.000	\$621.00
46.00	Stretch Wrap	4.00	\$184.00
92.00	Plastic Strapping	3.5000	\$322.00
229.00	Corner Board	5.000	\$1145.00

Dispute Amount Select Dispute Reason

Base Rate
Accessorial
Fuel Surcharge
Others

Total Approved Amount **\$700.00**

Attachments (Please submit invoices related to the case)
Drop your files here or browse Maximum size: 50MB

Submit Dispute

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

Line Item Description	Claim Date	Claim Amount	Status	Approved Amount	Approval/Denial Reason
Accessorial reaction	08/08/2023	\$621.00	Pending	\$0.00	
Stretch Wrap	07/18/2023	\$184.00	In Progress	\$0.00	
Plastic Strapping	05/01/2023	\$322.00	Denied	\$0.00	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

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.

Invoice #12853315

Quantity #	Line Item Description	Rate	Amount	Dispute Amount	Fax	Dispute Reason
27.00	Accessorial reaction	23.0000	\$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 type="checkbox"/>	
229.00	Corner Board	5.0000	\$1145.00	\$500.00	<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: 50MB

Uploaded file

Map each document uploaded to the document type.

Document Type
Bill of Lading
Invoice
Purchase Order
Pricing Agreement

Remove

Remove

Remove

Remove

Submit Dispute

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"

File New Dispute

Invoice # 12853315

Quantity #	Line Item Description	Rate	Amount	Dispute Amount	Fax	Dispute Reason
27.00	Accessorial reaction	23.0000	\$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 type="checkbox"/>	
229.00	Corner Board	5.0000	\$1145.00	\$500.00	<input checked="" type="checkbox"/>	

Attachments (Please submit invoices related to the case)

Upload

Claim-1.pdf

Claim-2.pdf

Claim-3.pdf

Claim-4.pdf

Bill of Lading

Purchase Order

Pricing Agreement

Done

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.

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:

internal user updates these

Invoice #12853315

Line Item Description	Claim Date	Claim Amount	Status	Approved Amount	Approval/Denial Reason
Accessorial noaction	08/08/2023	\$621.00	Pending	\$0.00	
Stretch Wrap	07/18/2023	\$184.00	In Progress	\$0.00	
Plastic Strapping	05/01/2023	\$322.00	Denied	\$0.00	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

The user get to this page after clicking:

Dispute Invoice

Most Recent Invoices

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

View Existing

The user get to this page also after clicking:

Most Recent Invoices

Invoice #	Claim Date	Status	Total Claim Amount	Status
12853315	07/18/2023	Dispute	\$621.00	View Details
12853316	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

Generated at Wed May 15 04:07:06 UTC 2024 by Bassel Matta using JIRA 7.3.3#73014-sha1:d5be8da522213be2ca9ad7b043c51da6e4cc9754.