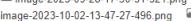
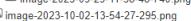
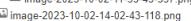
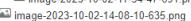
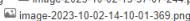
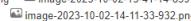
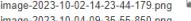
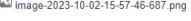
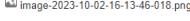
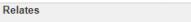
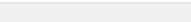
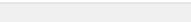
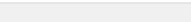
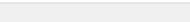
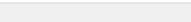
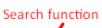


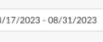
[CRM-243] [Claims] BNP - Fulfillment - UF Claims & Disputes <small>Created: 06/20/23 Updated: 10/19/23</small>			
Status:	New	Priority:	Major
Project:	CRM	Assignee:	jim.huang
Component/s:	None	Votes:	0
Affects Version/s:	None		
Fix Version/s:	None		
Type:	Story	Priority:	Major
Reporter:	Bassel Matta	Assignee:	jim.huang
Resolution:	Unresolved	Votes:	0
Labels:	BNP Claims, Disputes, UF		
Remaining Estimate:	Not Specified		
Time Spent:	Not Specified		
Original Estimate:	Not Specified		
Attachments:	                  		
Issue Links:	Relates relates to CRM-169 [Claims] BNP Claims - Master		
Story Points:	0		New
Test Hours:	0		
Dev Hours:	0		

Description**Search & Filters Function:**

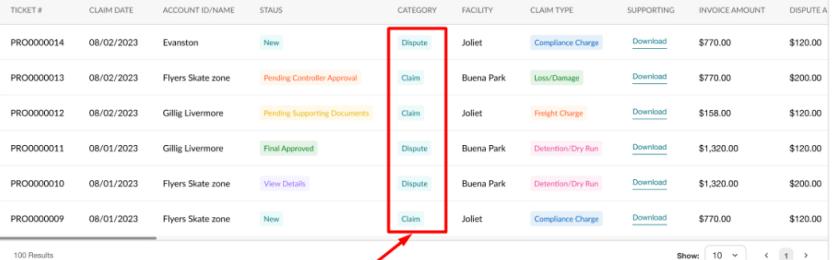
unis

Account Receivable ▾ Invoice ▾ User Management ▾ User Role Permission ▾ Report ▾ Account Management ▾ Claims & Disputes ▾   

Claim & Dispute Management 

Status  Claim Type  Category  Account Name    



TICKET #	CLAIM DATE	ACCOUNT ID/NAME	STATUS	CATEGORY	FACILITY	CLAIM TYPE	SUPPORTING	INVOICE AMOUNT	DISPUTE A
PRO00000014	08/02/2023	Evanston	New	Dispute	Joliet	Compliance Charge	Download	\$770.00	\$120.00
PRO00000013	08/02/2023	Flyers Skate zone	Pending Controller Approval	Claim	Buena Park	Loss/Damage	Download	\$770.00	\$200.00
PRO00000012	08/02/2023	Gillig Livermore	Pending Supporting Documents	Claim	Joliet	Freight Charge	Download	\$158.00	\$120.00
PRO00000011	08/01/2023	Gillig Livermore	Final Approved	Dispute	Buena Park	Detention/Dry Run	Download	\$1,320.00	\$120.00
PRO00000010	08/01/2023	Flyers Skate zone	View Details	Dispute	Buena Park	Detention/Dry Run	Download	\$1,320.00	\$200.00
PRO00000009	08/01/2023	Flyers Skate zone	New	Claim	Joliet	Compliance Charge	Download	\$770.00	\$120.00

100 Results  

























































<img alt="Mixed values in category column" data-bbox="258 4468 318

On the frontend on the client portal for the customer, it will show status as "Processing".

Pending Controller Approval: when a claim/dispute is approved by the operations, it will then automatically get assigned to Controller to approve/deny the claim/dispute.

On the frontend on the client portal for the customer, it will show status as "Processing".

Pending Supporting Documents: when someone from internal team claims department request more documents from the customer, the ticket will still be assigned to the same party in BNP but it will have a new status that is listed above so that way we know that there is some missing documents and we have requested them from the user to upload on the client portal.

On the frontend on the client portal for the customer, it will show status as "Processing".

User Updated: if the user upload new documents that we have requested so we can review, then it will be under "User Updated" so that way someone from BNP claims department who is assigned to the claim can go back and see that the user has uploaded these documents that internal user has requested in the step above.

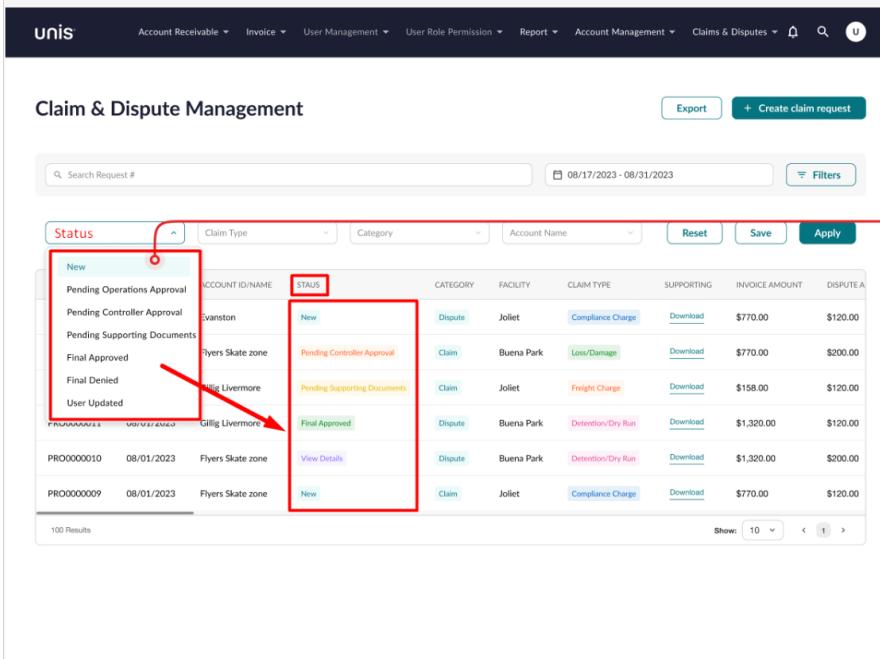
On the frontend on the client portal for the customer, it will show status as "Processing".

Final Approval: if the claim/dispute is finally approved by "Controller" (Janet) then it will be assigned this tag, and the user on the frontend will know that the claim has been approved for a \$XX xx amount that the internal user in BNP approves.

On the frontend on the client portal for the customer, it will show status as "Approved".

Final Denied: if the claim is denied by the last approval party, it will get this status.

On the frontend on the client portal for the customer, it will show status as "Denied".

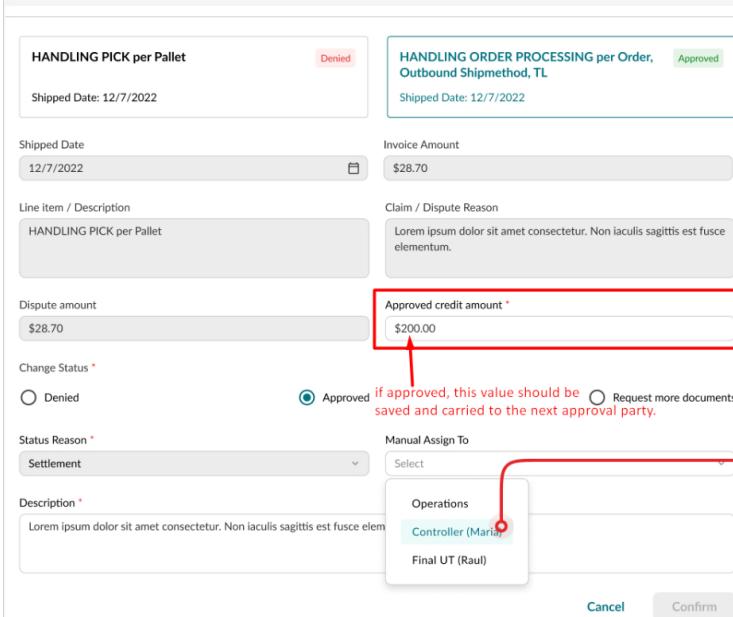


The screenshot shows a table of claims and disputes. The columns include: Status, Account ID/Name, Category, Facility, Claim Type, Supporting, Invoice Amount, and Dispute A. The 'Status' column is highlighted with a red box. A red arrow points from the 'Status' column to a specific row where 'Final Approved' is listed. The table contains several rows of data, each with a unique ID, date, location, and claim type. For example, one row shows 'PRO00000010' on 08/01/2023 at 'Flyers Skate zone' with a 'Dispute' type and an invoice amount of '\$770.00'.

Note: If it is a claim, sometimes it is not linked to a specific invoice, so we don't know the invoice amount to show in the table above, so we can put "N/A" or \$0.00 since there is no value for it.

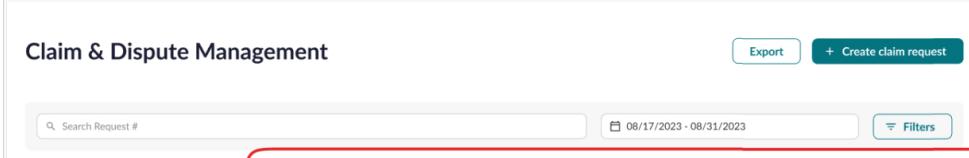
Note: For "View Details" it will show if the dispute has more than 1 line item in it. Lets say there is a dispute that has 3 line items and each of them has different status, then we will just show "view details" and when the user clicks on it, then we will open the popup of "view data" so the user can see the breakdown of all the line items.

Note: For Approval, when an internal user approves and put an amount in the "Approved Claim Amount" field, this value should carry to the next step in the workflow but it should still be editable so the next person in the workflow can make the necessary modifications to the amount if needed.



The screenshot shows the 'HANDLING ORDER PROCESSING per Order' section. It includes fields for 'Shipped Date' (12/7/2022), 'Invoice Amount' (\$28.70), 'Line Item / Description' (HANDLING PICK per Pallet), 'Claim / Dispute Reason' (Lorem ipsum dolor sit amet consectetur. Non iaculis sagittis est fusce elementum.), 'Dispute amount' (\$28.70), and 'Approved credit amount' (\$200.00). A tooltip for the 'Approved credit amount' field states: 'if approved, this value should be saved and carried to the next approval party.' A modal window is open, showing a dropdown for 'Manual Assign To' with 'Controller (Maria)' selected. The modal has 'Cancel' and 'Confirm' buttons.

Filter - Claim Type: Once internal user clicks here, they can filter claims/disputes based on a specific type that the user selected on the client portal.



The screenshot shows a table of claims and disputes. The columns include: Status, Claim Type, Category, Facility, Claim Type, Supporting, Invoice Amount, and Dispute A. The 'Claim Type' column is highlighted with a red box. A red arrow points from the 'Claim Type' column to a specific row where 'Compliance Charge' is listed. The table contains several rows of data, each with a unique ID, date, location, and claim type. For example, one row shows 'PRO00000010' on 08/01/2023 at 'Flyers Skate zone' with a 'Dispute' type and an invoice amount of '\$770.00'.

filter what type of claims/disputes to search for.

		Type	Category	Account Name	Reset	Save	Apply
TICKET #	CLAIM DATE		CATEGORY	FACILITY	CLAIM TYPE	SUPPORTING	INVOICE AMOUNT
PRO00000014	08/02/2023	Fulfillment Compliance Charge	Approval	Joliet	Compliance Charge	Download	\$770.00
PRO00000013	08/02/2023	Fulfillment Detention/dry run	Pending Approval	Joliet	Loss/Damage	Download	\$120.00
PRO00000012	08/02/2023	Fulfillment Freight Charge	Pending Approval	Joliet	Freight Charge	Download	\$770.00
PRO00000011	08/01/2023	Fulfillment Loss/Damage	Final Approved	Buena Park	Detention/Dry Run	Download	\$200.00
PRO00000010	08/01/2023	Others	Pending Supporting Documents	Joliet	Detention/Dry Run	Download	\$1,320.00
PRO00000009	08/01/2023		Claim	Buena Park	Compliance Charge	Download	\$120.00
						Show: 10	< 1 >

Filter - Category: Once internal user clicks here, they can filter if they want to see claims or disputes based on a specific type that the user selected on the client portal. Since we have merged both claims and disputes in one department for UF, then we want to give the option for the internal BNP user to filter if this is a claim or dispute.

Claim & Dispute Management

Export + Create claim request

Search Request # 08/17/2023 - 08/31/2023 Filters

New	Compliance Charge	Category	Account Name	Reset	Save	Apply
TICKET #	CLAIM DATE	ACCOUNT ID/NAME	STATUS	FACILITY	CLAIM TYPE	SUPPORTING
PRO00000014	08/02/2023	Evanston	New	Joliet	Compliance Charge	Download
PRO00000013	08/02/2023	Flyers Skate zone	Pending Controller Approval	Claim	Buena Park	Loss/Damage
PRO00000012	08/02/2023	Gillig Livermore	Pending Supporting Documents	Claim	Joliet	Freight Charge
PRO00000011	08/01/2023	Gillig Livermore	Final Approved	Dispute	Buena Park	Detention/Dry Run
PRO00000010	08/01/2023	Flyers Skate zone	View Details	Dispute	Buena Park	Detention/Dry Run
PRO00000009	08/01/2023	Flyers Skate zone	New	Claim	Joliet	Compliance Charge
100 Results						Show: 10 < 1 >

This is where the customer selects the claim type on the frontend on the client portal:

Claims & Disputes > File New Claim > Fulfillment > Claims/Disputes:

What type of dispute are you looking to file?

Please select your dispute type



File a new claim

A claim can be linked to a specific invoice



File a dispute for an open Invoice

Dispute is linked to a specific open invoice

Next

Filter - Account name: user can select claims and disputes coming from a specific customer account.

Claim & Dispute Management

Export + Create claim request

Search Request # 08/17/2023 - 08/31/2023 Filters

New	Compliance Charge	Category	Account Name	Reset	Save	Apply
TICKET #	CLAIM DATE	ACCOUNT ID/NAME	STATUS	CATEGORY	FACILITY	SUPPORTING
PRO00000014	08/02/2023	Evanston	New	Approval	Joliet	Compliance Charge
PRO00000013	08/02/2023	Flyers Skate zone	Pending Approval	Claim	Buena Park	Loss/Damage
PRO00000012	08/02/2023	Gillig Livermore	Pending Supporting Documents	Claim	Joliet	Freight Charge
PRO00000011	08/01/2023	Gillig Livermore	Final Approved	Dispute	Buena Park	Detention/Dry Run
PRO00000010	08/01/2023	Flyers Skate zone	View Details	Dispute	Buena Park	Detention/Dry Run
PRO00000009	08/01/2023	Flyers Skate zone	New	Claim	Joliet	Compliance Charge
100 Results						Show: 10 < 1 >

PRO00000014	08/02/2023	Evanston	New	Dispute	J	12080 - Gillig Livermore	ad	\$770.00	\$120.00
PRO00000013	08/02/2023	Flyers Skate zone	Pending Controller Approval	Claim	I	ACME FOOD SALES INC	ad	\$770.00	\$200.00
PRO00000012	08/02/2023	Gillig Livermore	Pending Supporting Documents	Claim	Joliet	Freight Charge	Download	\$158.00	\$120.00
PRO00000011	08/01/2023	Gillig Livermore	Final Approved	Dispute	Buena Park	Detention/Dry Run	Download	\$1,320.00	\$120.00
PRO00000010	08/01/2023	Flyers Skate zone	View Details	Dispute	Buena Park	Detention/Dry Run	Download	\$1,320.00	\$200.00
PRO00000009	08/01/2023	Flyers Skate zone	New	Claim	Joliet	Compliance Charge	Download	\$770.00	\$120.00

100 Results

Show: 10 < 1 >

Main dashboard columns:

Claim & Dispute Management									
				Export + Create claim request					
TICKET #	CLAIM DATE	ACCOUNT ID/NAME	STATUS	CATEGORY	FACILITY	CLAIM TYPE	SUPPORTING	INVOICE AMOUNT	DISPUTED
PRO00000014	08/02/2023	Evanston	New	Dispute	Joliet	Compliance Charge	Download	\$770.00	\$120.00
PRO00000013	08/02/2023	Flyers Skate zone	Pending Controller Approval	Claim	Buena Park	Loss/Damage	Download	\$770.00	\$200.00
PRO00000012	08/02/2023	Gillig Livermore	Pending Supporting Documents	Claim	Joliet	Freight Charge	Download	\$158.00	\$120.00
PRO00000011	08/01/2023	Gillig Livermore	Final Approved	Dispute	Buena Park	Detention/Dry Run	Download	\$1,320.00	\$120.00
PRO00000010	08/01/2023	Flyers Skate zone	View Details	Dispute	Buena Park	Detention/Dry Run	Download	\$1,320.00	\$200.00
PRO00000009	08/01/2023	Flyers Skate zone	New	Claim	Joliet	Compliance Charge	Download	\$770.00	\$120.00
PRO00000008	07/31/2023	Evanston	User Updated	Claim	Buena Park	Loss/Damage	Download	\$158.00	\$200.00
PRO00000007	07/31/2023	Evanston	Final Denied	Claim	Joliet	Loss/Damage	Download	\$158.00	\$200.00
PRO00000006	07/31/2023	Flyers Skate zone	View Details	Dispute	Buena Park	Freight Charge	Download	\$770.00	\$120.00
PRO00000005	07/30/2023	Gillig Livermore	New	Dispute	Buena Park	Compliance Charge	Download	\$1,320.00	\$200.00

mixed claims and disputes of fulfillment

All of the data and columns data shown in the image above are from the user on client portal. They enter this info when they are creating the claims and disputes, then all the data will get mapped to here. A lot of the data they do not enter, it is set automatically based on the selections they make on the client portal claims pages.

The TICKET # is created automatically. In the case of a dispute, we will use the INVOICE # of the dispute as the ticket number. So when the user is filing a dispute on the client portal frontend and they select a INVOICE #, then the INVOICE # will be shown here. However in the case that the user is filing a fulfillment claim, which is NOT linked to a specific invoice, then the TICKET # will be generated automatically by the BNP system. The claim number on the frontend on the client portal could be mapped to the backend number in BNP, the numbers should match.

Sometimes the "Account Name" will be auto-filled if the account is for 1 customer, and is not a master account. Then we already know that this account is only for 1 customer. However if it is a master account and there is a lot of accounts under the same account then we will map the account name from the dropdown selection. Please refer to the mapping guide to see where we get the "Account name" from if it is a master account.

When "View Data" is clicked on dispute:

Claim & Dispute Management									
				Export + Create claim request					
CLAIM DATE	ACCOUNT ID/NAME	STATUS	CATEGORY	FACILITY	CLAIM TYPE	SUPPORTING	INVOICE AMOUNT	DISPUTE AMOUNT	INVOICE STATUS
08/02/2023	Evanston	New	Dispute	Joliet	Compliance Charge	Download	\$770.00	\$120.00	
08/02/2023	Flyers Skate zone	Pending Controller Approval	Claim	Buena Park	Loss/Damage	Download	\$770.00	\$200.00	
08/02/2023	Gillig Livermore	Pending Supporting Documents	Claim	Joliet	Freight Charge	Download	\$158.00	\$120.00	
08/01/2023	Gillig Livermore	Final Approved	Dispute	Buena Park	Detention/Dry Run	Download	\$1,320.00	\$120.00	
08/01/2023	Flyers Skate zone	View Details	Dispute	Buena Park	Detention/Dry Run	Download	\$1,320.00	\$200.00	
08/01/2023	Flyers Skate zone	New	Claim	Joliet	Compliance Charge	Download	\$770.00	\$120.00	
07/31/2023	Evanston	User Updated	Claim	Buena Park	Loss/Damage	Download	\$158.00	\$200.00	
07/31/2023	Evanston	Final Denied	Claim	Joliet	Loss/Damage	Download	\$158.00	\$200.00	
07/31/2023	Flyers Skate zone	View Details	Dispute	Buena Park	Freight Charge	Download	\$770.00	\$120.00	
07/30/2023	Gillig Livermore	New	Dispute	Buena Park	Compliance Charge	Download	\$1,320.00	\$200.00	

100 Results

Show: 10 < 1 >

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Account Receivable ▾ Invoice ▾ User Management ▾ User Role Permission ▾ Report ▾ Account Management ▾ Claims & Disputes ▾

u

Claim & Dispute Management

Export

+ Create claim request

Search Request # MM/DD/YY - MM/DD/YY

Ticket # PRO0000010

each line item has its own status

Quantity #	Line Item Descr	Rate	Invoice Amount	Dispute Amount	Status	Dispute Reason
27.00	Accessory n	23.00	\$621.00	\$100.00	New	Base Rate
46.00	Stretch Wrap	4.00	\$184.00	\$100.00	User Updated	Accessory
92.00	Plastic Strap	3.5000	\$322.00	\$322.00	Pending Supporting Documents	Accessory
229.00	Corner Board	5.000	\$1145.00	\$500.00	Final Approved	Fuel Surcharge

Close

Quantity Line Item Descr Rate Invoice Amount Dispute Amount Status Dispute Reason

100 Results

Show: 10 < >

When "Change Status" is clicked on dispute:

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Account Receivable ▾ Invoice ▾ User Management ▾ User Role Permission ▾ Report ▾ Account Management ▾ Claims & Disputes ▾

Claim & Dispute Management

Export + Create claim request

Search Request # 08/17/2023 - 08/31/2023

CLAIM DATE	ACCOUNT ID/NAME	STATUS	CATEGORY	FACILITY	CLAIM TYPE	SUPPORTING	INVOICE AMOUNT	DISPUTE AMOUNT
08/01/2023	Evanson	New	Denied	Joliet	Compliance Charge	Download	\$770.00	\$120.00
08/02/2023	Flyers	New	Denied	Joliet	Compliance Charge	Download	\$770.00	\$120.00
08/02/2023	Gillig Livermore	New	Denied	Buena Park	Freight Charge	Download	\$770.00	\$120.00
08/01/2023	Gillig Livermore	New	Denied	Buena Park	Compliance Charge	Download	\$1,320.00	\$200.00
07/31/2023	Flyers Skate zone	New	Denied	Buena Park	Freight Charge	Download	\$770.00	\$120.00
07/31/2023	Evanson	New	Denied	Buena Park	Loss/Damage	Download	\$156.00	\$200.00
07/31/2023	Evanson	New	Denied	Buena Park	Loss/Damage	Download	\$156.00	\$200.00
07/31/2023	Evanson	New	Denied	Buena Park	Loss/Damage	Download	\$156.00	\$200.00
07/31/2023	Evanson	New	Denied	Buena Park	Loss/Damage	Download	\$156.00	\$200.00
07/30/2023	Gillig Livermore	New	Denied	Buena Park	Compliance Charge	Download	\$1,320.00	\$200.00

100 Results

Show: 10 < >

Ticket # PRO0000010

Invoice number: **PRO0000010**

Here we will show all the line items that the user has filed dispute for:

item line 1 **item line 2**

user can select which line item they want to approve/deny or change status for.

user can select which line item they want to approve/deny or change status for.

After the user select:

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Account Receivable ▾ Invoice ▾ User Management ▾ User Role Permission ▾ Report ▾ Account Management ▾ Claims & Disputes ▾

Claim & Dispute Management

Ticket # PRO0000010

if user selected this line item:

HANDLING PICK per Pallet

Shipped Date: 12/7/2022

HANDLING ORDER PROCESSING per Order, Outbound Shipment, TL

Shipped Date: 12/7/2022

Shipped Date: 12/7/2022

Invoice Amount: \$28.70

Line Item / Description: HANDLING PICK per Pallet

Claim / Dispute Reason: Lorem ipsum dolor sit amet consectetur. Non iaculis sagittis est fusce elementum.

Dispute amount: \$28.70

Approved credit amount: \$28.70

Change Status: Denied Approved Request more documents

Manual Assign To:

Make this dropdown menu available ON/OFF from the settings.

Description: show all the details here for this line item.

When "View Data" is clicked on claim:

Each claim can have a different fields when "view data" is clicked, it depends if it is:

-Compliance charge

-Loss/damage

-Freight charge

-Detention run

Each of these claims have their own fields, so we will only show the fields that are related to the claim, please refer to the fields and find them on the claims client portal frontend.

<https://www.figma.com/file/D7Kjy8SNoWGYQkI3Y2Ytqv/Client-Portal-V2?type=design&node-id=699-6307&mode=design<=2A4Mj9dN4vxIkPwW-0>

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Account Receivable ▾ Invoice ▾ User Management ▾ User Role Permission ▾ Report ▾ Account Management ▾ Claims & Disputes ▾

Claim & Dispute

Ticket # PRO0000010 Pending Controller Approval

Customer ID: DELPRD0002 Customer Name: DELTA ELECTRONICS (America) LTD - NEW

Po #: 123456 Reference Number:

Ship to: TESTER Shipped Date: 08-08-2023

Location: UT-Grand Prairie Claim amount: \$28.70

Address: 2250 Lion Country Parkway, Suite 100, Grand Prairie, TX 75051, UNITED STATES

Description: *Lorem ipsum dolor sit amet consectetur. Non iaculis sagittis est fusce elementum.*

Signature:

Email: Tester@unisco.com Name: Tester

Phone Number: 1234567890

This data comes from client portal from claims details, the user input these details.

Close

Clicking the "Close" button or the "X" at the top of the popup, will close the popup and show the main dashboard claims and disputes.

When "Change Status" is clicked on claim:

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Account Receivable ▾ Invoice ▾ User Management ▾ User Role Permission ▾ Report ▾ Account Management ▾ Claims & Disputes ▾

Claim & Dispute

Ticket # PRO0000010 Submitted

Submitted Date: 12/7/2022 Invoice Amount: \$28.70

Line Item / Description: HANDLING PICK per Pallet Claim / Dispute Reason: *Lorem ipsum dolor sit amet consectetur. Non iaculis sagittis est fusce elementum.*

Dispute amount: \$28.70 Approved credit amount:

Change Status: Pending Approved Denied

Approved

Request more documents

Manual Assign To: Select

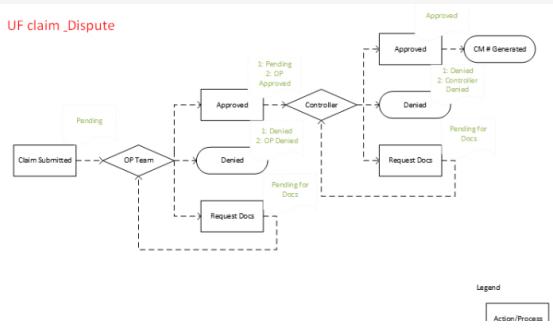
Description:

Cancel Confirm

We will currently disable the "Manual Assign To" dropdown menu but we will have it in admin settings to allow it in the future.

We will currently disable the "Status Reason" dropdown menu but we will have it in admin settings to allow it in the future.

Workflow:





System Status

1. Front End

2. Backend

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