



ORACLE TRANSPORTATION MANAGEMENT (OTM)

Clayton Homes Carrier Resource Guide

Version
V1_10252023

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Introduction

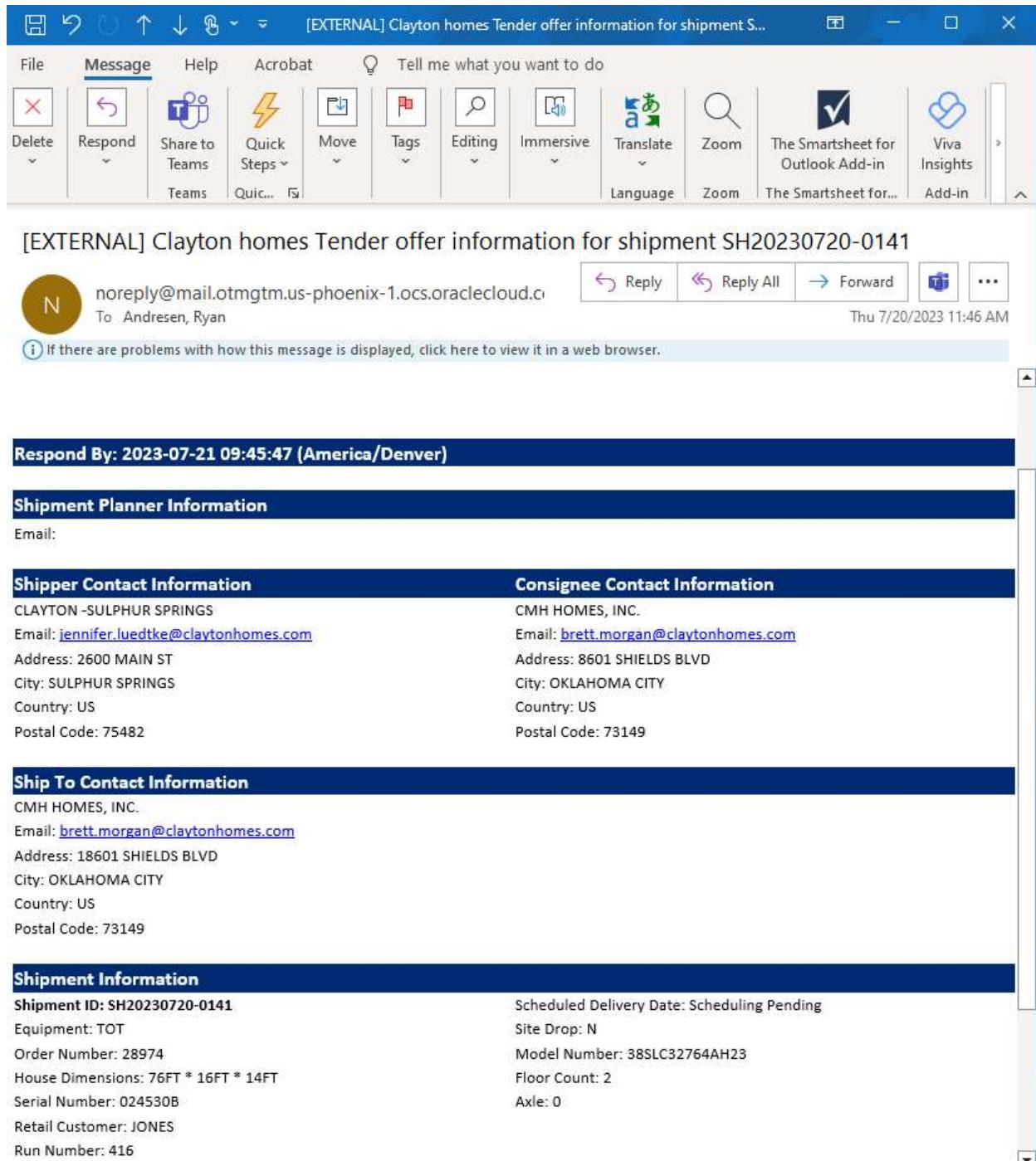
Clayton has been embarking on a journey to modernize its technology and one of those initiatives is to improve how we plan, schedule, and ship our homes to our retail and community partners. We have selected Oracle's Transportation Management System (TMS) to improve the overall home transport experience. The end goal is to improve how we interact with you, our valuable partner, and provide you the opportunity to continue to grow your business with us.

Undergoing a change like this is a massive undertaking and we recognize that this may require significant changes and impacts to your team. Our end goal is to make this process a long-term benefit to our partnership by creating a more streamlined flow of information and improved overall experience. Once the project is fully complete, we aim to provide you with more timely updates on orders, more details on order information directly from our production platforms and create more visibility for backhauls and cross plant hauling. We also will aim to reduce the number of emails, spreadsheets and phone calls and house all shipping activities on one platform, consistently amongst our 40 plants across the United States.

In this guide, you will find step-by-step instructions on how to perform the required steps in our carrier portal. We want to thank you in advance for your patience during the process and we look forward to working with you to create a World Class transportation experience with Clayton.

Order Tendering

When a planner at our facility tenders an order to the carrier, an email will be sent providing details of the order and asking the carrier to either ACCEPT or DECLINE the offer to move the home. The tender will include important information such as pickup and delivery location and request dates, floor serial number, dimensions, etc.

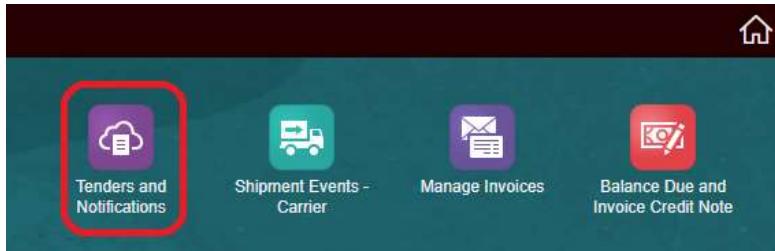


The screenshot shows an Outlook message window with the following details:

- Subject:** [EXTERNAL] Clayton homes Tender offer information for shipment SH20230720-0141
- From:** noreply@mail.otmgmt.us-phoenix-1.ocs.oraclecloud.ci
- To:** Andresen, Ryan
- Date:** Thu 7/20/2023 11:46 AM
- Message Headers:** If there are problems with how this message is displayed, click here to view it in a web browser.
- Content:**
 - Respond By:** 2023-07-21 09:45:47 (America/Denver)
 - Shipment Planner Information:** Email: [redacted]
 - Shipper Contact Information:** CLAYTON -SULPHUR SPRINGS, Email: jennifer.luedtke@claytonhomes.com, Address: 2600 MAIN ST, City: SULPHUR SPRINGS, Country: US, Postal Code: 75482
 - Consignee Contact Information:** CMH HOMES, INC., Email: brett.morgan@claytonhomes.com, Address: 8601 SHIELDS BLVD, City: OKLAHOMA CITY, Country: US, Postal Code: 73149
 - Ship To Contact Information:** CMH HOMES, INC., Email: brett.morgan@claytonhomes.com, Address: 18601 SHIELDS BLVD, City: OKLAHOMA CITY, Country: US, Postal Code: 73149
 - Shipment Information:** Shipment ID: SH20230720-0141, Equipment: TOT, Order Number: 28974, House Dimensions: 76FT * 16FT * 14FT, Serial Number: 024530B, Retail Customer: JONES, Run Number: 416, Scheduled Delivery Date: Scheduling Pending, Site Drop: N, Model Number: 38SLC32764AH23, Floor Count: 2, Axle: 0

How to Accept or Decline a Tender?

Step #1 - From your Oracle Menu, go to Tender and Notification Icon



Step #2 – Perform a search by either adding filters to locate a specific tender or no criteria and pressing “Search”. No criteria will show you all your tenders. We suggest filtering by Tender Offer Status and selecting “Outstanding” to see new orders no accepted.

≡ ORACLE Transportation and Global Trade Management

Online Booking/Tendering Finder

Online Booking/Tendering Audit

Serial Number	Contains	Origin Location ID	Begins With
Shipment Reference Number	Contains	Origin Location Name	Begins With
Shipment Reference Qualifier	AO APPROVAL_DATE AMOUNT	Origin City	Begins With
Respond By (America/New_York)	Same As	Origin Province Code	Begins With
Pickup Date (America/New_York)	Same As	Destination Location ID	Begins With
Delivery Date (America/New_York)	Same As	Destination Location Name	Begins With
Service Provider ID	Begins With	Destination City	Begins With
Tender Acceptance Status	ACCEPTED REJECTED CONDITIONALLY ACCEPTED PARTIALLY ACCEPTED	Destination Province Code	Begins With
Tender Offer Status	OUTSTANDING TENDER OPEN PICKUP NOTIFICATION ARRIVED	Total Ship Unit Count	=
Favorites	<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Both	Indicator	

Search **Sort Order** **Actions** **Export** **Saved Query:** **Execute Query** **Actions** **Edit** **Save**

Step #3- Click on the order you want to ACCEPT or DECLINE

Online Booking/Tendering Total Found: 44										
Actions ▾		60	Filter	Print	Reset	Export	CSV	PDF	Excel	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	★ ID	Status	Serial Num...	Origin Location Name	Origin City	State/Province Code	Destination Location ...	Destination City	State/Pr
<input type="checkbox"/>	<input type="checkbox"/>	24669	TEN	010357A	Clayton -Albuquerque	ALBUQUERQUE	NM	CMH HOMES, INC.	EVANS	CO
<input type="checkbox"/>	<input type="checkbox"/>	24674	TEN	010321B	Clayton -Albuquerque	ALBUQUERQUE	NM	FIESTA MOBILE HOM...	LAS CRUCES	NM
<input type="checkbox"/>	<input type="checkbox"/>	13203	ACC	056989A	Clayton -Nashville	NASHVILLE	NC	WHITE, EBbie OSCAR	RICHLANDS	NC
<input type="checkbox"/>	<input type="checkbox"/>	14526	ACC	032569B	Clayton -Addison II	ADDISON	AL	CMH HOMES, INC.	ANNISTON	AL
<input type="checkbox"/>	<input type="checkbox"/>	14528	ACC	032569B	Clayton -Addison II	ADDISON	AL	CMH HOMES, INC.	ANNISTON	AL
<input type="checkbox"/>	<input type="checkbox"/>	14775	ACC	040531A	APPALACHIA	ANDERSONVILLE	TN	CMH HOMES, INC.	BOWLING GREEN	KY
<input type="checkbox"/>	<input type="checkbox"/>	14777	ACC	040531B	APPALACHIA	ANDERSONVILLE	TN	CMH HOMES, INC.	BOWLING GREEN	KY
<input type="checkbox"/>	<input type="checkbox"/>	24637	TEN	010365B	Clayton -Albuquerque	ALBUQUERQUE	NM	CMH HOMES, INC.	EVANS	CO
<input type="checkbox"/>	<input type="checkbox"/>	24710	TEN	084968B	Clayton -Russellville	RUSSELLVILLE	AL	CMH HOMES, INC.	GREENVILLE	AL
<input type="checkbox"/>	<input type="checkbox"/>	24712	TEN	017972A	CLAYTON - ADDISON	ADDISON	AL	CMH HOMES, INC.	JOPLIN	MO
<input type="checkbox"/>	<input type="checkbox"/>	24770	ACC	040684B	APPALACHIA	ANDERSONVILLE	TN	CMH HOMES, INC.	BOWLING GREEN	KY
<input type="checkbox"/>	<input type="checkbox"/>	24835	TEN	026933B	CLAYTON -SULPHUR ...	SULPHUR SPRINGS	TX	U.S.A. U-SAVE HOME...	PARIS	TX
<input type="checkbox"/>	<input type="checkbox"/>	24840	TEN	024523B	CLAYTON -SULPHUR ...	SULPHUR SPRINGS	TX	ROBERTS FAMILY HO...	SEGUIN	TX
<input type="checkbox"/>	<input type="checkbox"/>	24620	TEN	010310A	Clayton -Albuquerque	ALBUQUERQUE	NM	CMH HOMES, INC.	SNOWFLAKE	AZ
<input type="checkbox"/>	<input type="checkbox"/>	24638	TEN	084972B	Clayton -Russellville	RUSSELLVILLE	AL	DICK MOORE INCOR...	MILLINGTON	TN
<input type="checkbox"/>	<input type="checkbox"/>	24643	TEN	010349A	Clayton -Albuquerque	ALBUQUERQUE	NM	HOMES DIRECT OF A...	BUCKEYE	AZ
<input type="checkbox"/>	<input type="checkbox"/>	24679	TEN	017950A	CLAYTON - ADDISON	ADDISON	AL	DRAIN & LOVOY	CULLMAN	AL
<input type="checkbox"/>	<input type="checkbox"/>	24844	TEN	024530A	CLAYTON -SULPHUR ...	SULPHUR SPRINGS	TX	CMH HOMES, INC.	OKLAHOMA CITY	OK
<input type="checkbox"/>	<input type="checkbox"/>	24834	TEN	026933A	CLAYTON -SULPHUR ...	SULPHUR SPRINGS	TX	U.S.A. U-SAVE HOME...	PARIS	TX
<input type="checkbox"/>	<input type="checkbox"/>	24841	TEN	024523A	CLAYTON -SULPHUR ...	SULPHUR SPRINGS	TX	ROBERTS FAMILY HO...	SEGUIN	TX
<input type="checkbox"/>	<input type="checkbox"/>	14774	ACC	040531A	APPALACHIA	ANDERSONVILLE	TN	CMH HOMES, INC.	BOWLING GREEN	KY

Step #4 – Review details of the order such as Pick Up and Deliver Dates, shipment cost and if you accept the tender offer, select “ACCEPT” at bottom of the screen. If you cannot move the shipment on the dates provided, then select “DECLINE”

ORACLE Transportation and Global Trade Management

Online Booking/Tendering Result > Online Booking/Tendering

Online Booking/Tendering ☆

Identification	Shipment	Equipment	Stops	Financials	Involved Parties	Mode	Remarks	Order Information	Advanced	Shipment Status	Booking	Tracking				
Tender ID : Tender Offer Status																
Tender Offer Status OUTSTANDING										Respond By	07-21-2023 11:45 America/New_York	Service Provider ID	CMHTMANGK			
Tender Acceptance Status NO RESPONSE										Responding User		Service Provider Name	A&G COMMERCIAL TRUCKING			
Origin Location CLAYTON-SULPHUR SPRINGS 2600 MAIN ST SULPHUR SPRINGS, TX 75482, US										Pickup Date	07-20-2023 09:49 America/Chicago	Tender Response Time				
Destination Location CMH HOMES, INC. 8801 SHIELDS BLVD OKLAHOMA CITY, OK 73149, US										Delivery Date	07-20-2023 14:14 America/Chicago	Shipment Cost	2,409.05 USD			
Total Weight 33100.00 LB										Total Volume	1.00 CUFT	Hazardous Materials	N			
Temperature Controlled △										Total Number of Stops	2					
Tender Type Ordinary										Total Net Weight	33100.00 LB	Total Net Volume	1.00 CUFT			
Tender ID 24844										Loaded Distance	271	Unloaded Distance	0.00			
Driver ID										Secondary Driver ID		Power Unit ID				
Weight Utilization 0.331										Volume Utilization	1.0E-5	Equipment Reference Unit Utilization	1.0			
Comments																
Shipping Instructions																
More Shipment Information Total Shipping Spaces																
Reference Numbers <table border="1"> <tr> <td>Shipment Reference Number Qualifier</td> <td>Shipment Reference</td> </tr> <tr> <td>QUICKCODE_EAA</td> <td>N</td> </tr> </table>													Shipment Reference Number Qualifier	Shipment Reference	QUICKCODE_EAA	N
Shipment Reference Number Qualifier	Shipment Reference															
QUICKCODE_EAA	N															
<input type="button" value="Accept"/> <input type="button" value="Decline"/> <input type="button" value="Analyze Tender Performance"/> <input type="button" value="Shipment"/>																

Note: Once the order has been accepted, it is the transporter's responsibility to pick up at the scheduled delivery dates and times. Any updates to the order will be communicated via Order Updates and by the planner. In the next steps we will show you how to view and manage your order updates.

How to Update Pick Up and Delivery Events?

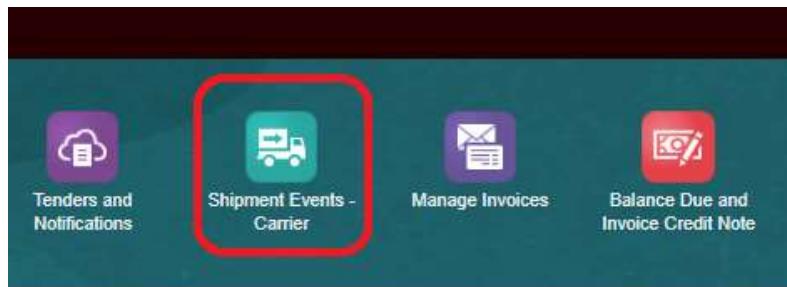
To keep up with all shipments, we are asking our partners to provide as close to real time as possible updates on when our orders ship from our home building facilities and also when delivery has been completed. There are 4 main shipping events we are asking you to update on each order.

- 1) **Arrive at Stop #1** – This is the date/time the driver arrived at our plant to pick up the home. **USE QUICK CODE EAA**
- 2) **Depart at Stop #1** – This is the date/time the driver departed our plant with the home. **USE QUICK CODE EAD**

- 3) **Arrive at Stop #2** – This is when the driver arrives to the home centre, community, or customer site. **USE QUICK CODE EAA**
- 4) **Depart at Stop #2** – This is when the delivery has been complete, and the driver has departed the facility. You must also provide the accurate number of escorts used for the shipment at this point. **USE QUICK CODE EAD**

IMPORTANT: All 4 steps are required to move the order to COMPLETE status. This must happen for you to invoice us for the shipment.

Step #1 - To update shipping events, access the Shipment Events – Carrier icon from your workbench.



Step #2 - You have the option to search by Serial Number of the home or a wide-open search to display all your orders. Place a Check Box next to the order you are updating and select “Actions” and “Add Tracking Event”

Buy Shipment Events												Total Found: 1000		
Actions		ID	Shipment ID	Service Pr...	Transport	Serial Num...	Origin Locat...	Origin Location Name	Origin City	Stat...	Destination L...	Destination Location ...	Destination ...	Sta
<input checked="" type="checkbox"/>	★	CMHTM.SH20230720-0146	SH20230720-...	ANGK		024530B	10938	CLAYTON -SULPHUR ...	SULPHUR SP... TX	108800	CMH HOMES, INC.	OKLAHOMA ...	OK	
<input type="checkbox"/>	★	CMHTM.SH20230720-0145	SH20230720-...	ANGK		024530B	10938	CLAYTON -SULPHUR ...	SULPHUR SP... TX	108800	CMH HOMES, INC.	OKLAHOMA ...	OK	
<input type="checkbox"/>	★	CMHTM.SH20230720-0144	SH20230720-...	ANGK		024530A	10938	CLAYTON -SULPHUR ...	SULPHUR SP... TX	108800	CMH HOMES, INC.	OKLAHOMA ...	OK	
<input type="checkbox"/>	★	CMHTM.SH20230720-0143	SH20230720-...	ANGK		024530A	10938	CLAYTON -SULPHUR ...	SULPHUR SP... TX	108800	CMH HOMES, INC.	OKLAHOMA ...	OK	
<input type="checkbox"/>	★	CMHTM.SH20230720-0142	SH20230720-...	ANGK		024530A	10938	CLAYTON -SULPHUR ...	SULPHUR SP... TX	108800	CMH HOMES, INC.	OKLAHOMA ...	OK	
<input type="checkbox"/>	★	CMHTM.SH20230720-0141	SH20230720-...	ANGK		024530B	10938	CLAYTON -SULPHUR ...	SULPHUR SP... TX	108800	CMH HOMES, INC.	OKLAHOMA ...	OK	
<input type="checkbox"/>	★	CMHTM.SH20230720-0140	SH20230720-...	ANGK		024530A	10938	CLAYTON -SULPHUR ...	SULPHUR SP... TX	108800	CMH HOMES, INC.	NEW ORLEANS	OK	

Step #4 - The “Shipment Tracking Events” window will pop up. For Arrival at Pick Up or Arrival at Delivery, use the quick code EAA. For Leaving the Pick Up or Leaving the delivery use quick code EAD. You must select the updated event you are providing, the stop you are updating and the date/time of the event.

Shipment Tracking Events

1 of 1 New Finished

Identification

Event Reason

Quick Code

EAA

* Responsible Party

External User

Notify

* Status

Transport Events

Reason

No Error

Actual Arrival at Stop

Actual Departure from Stop

Normal Appointment

Normal Status

Enter Location Info

Shipment ID

SH20230720-0146

Shipment Stop

1. CLAYTON -SULPHUR SPRINGS, SULPHUR SPRINGS, TX, US

Location Name

Number of Escorts

Event Info

* Event Date/Time

07-20-2023 12:48:00

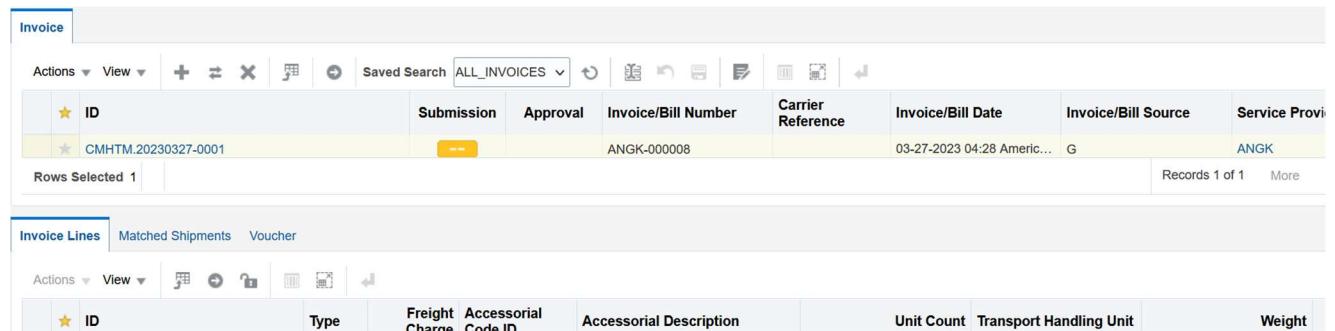


How to Submit and Invoice to Clayton?

Standard Invoice Submission

Once the Shipment is completed, OTM will auto-generate Invoice For carriers with Freight Payment Type defined as '**REVIEW_PAY**'

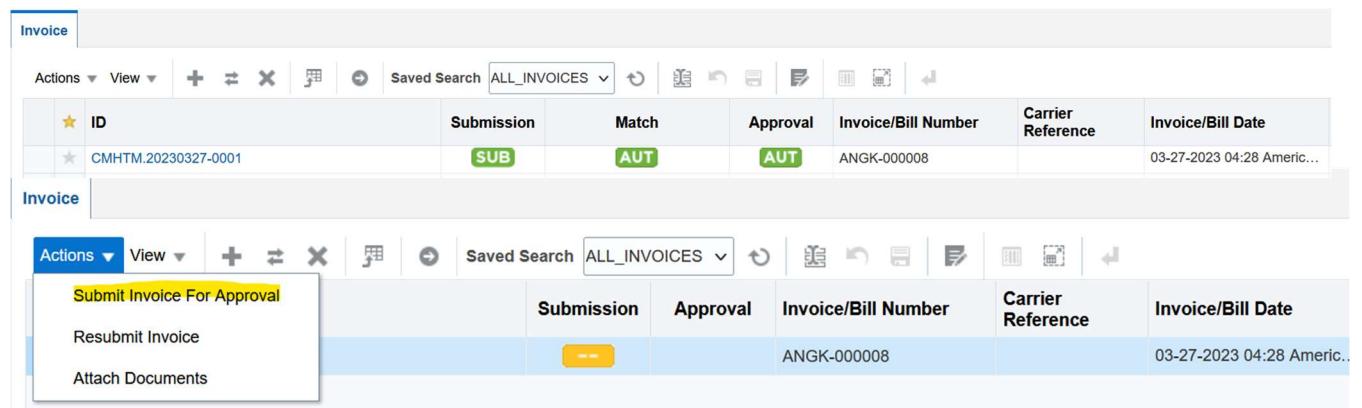
Carrier can find those invoices in **Payment Center Workbench**. When Invoice is available for review, submission status of the invoice will be 'Blank Yellow'



The screenshot shows the OTM Payment Center Workbench interface. The top section is the 'Invoice' tab, which displays a list of invoices. One invoice is selected, showing details: ID CMHTM.20230327-0001, Submission ANGK-000008, Approval ANGK-000008, Carrier Reference ANGK, Invoice/Bill Date 03-27-2023 04:28 America..., Invoice/Bill Source G, and Service Provider ANGK. The bottom section is the 'Invoice Lines' tab, which shows a list of invoice lines with columns for ID, Type, Freight Charge, Accessorial Code ID, Accessorial Description, Unit Count, Transport Handling Unit, and Weight.

Carrier can review the invoice and submit it for approval by performing action 'Submit Invoice For Approval'

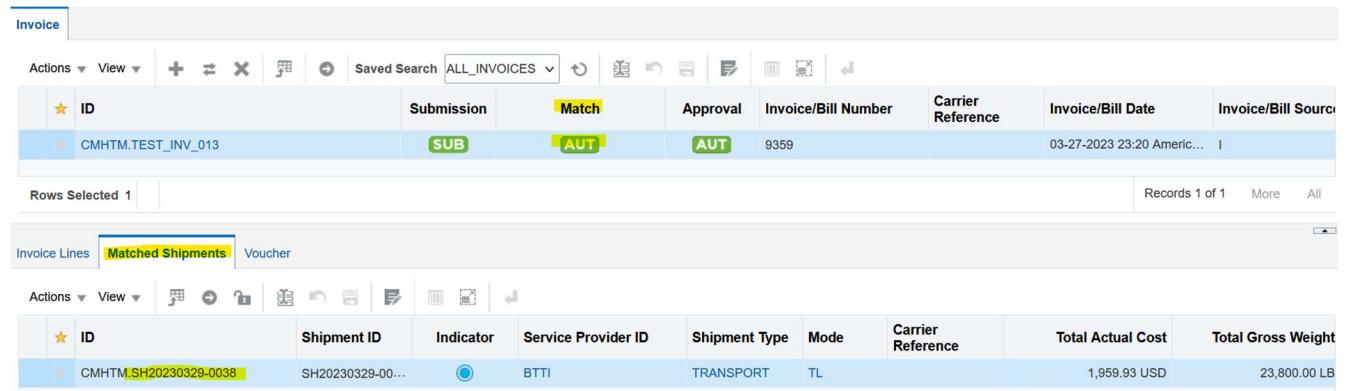
Once the Invoice is submitted, Submission status will be updated as 'SUB' and once it is approved Approval status will be updated as 'AUT'



The screenshot shows the OTM Payment Center Workbench interface. The top section is the 'Invoice' tab, which displays a list of invoices. One invoice is selected, showing details: ID CMHTM.20230327-0001, Submission SUB, Match AUT, Approval AUT, Carrier Reference ANGK-000008, and Invoice/Bill Date 03-27-2023 04:28 America... The bottom section is the 'Invoice' tab, which shows a list of invoice lines. A context menu is open over the selected invoice line, with options: 'Submit Invoice For Approval' (highlighted in yellow), 'Resubmit Invoice', and 'Attach Documents'.

Auto Match Invoices

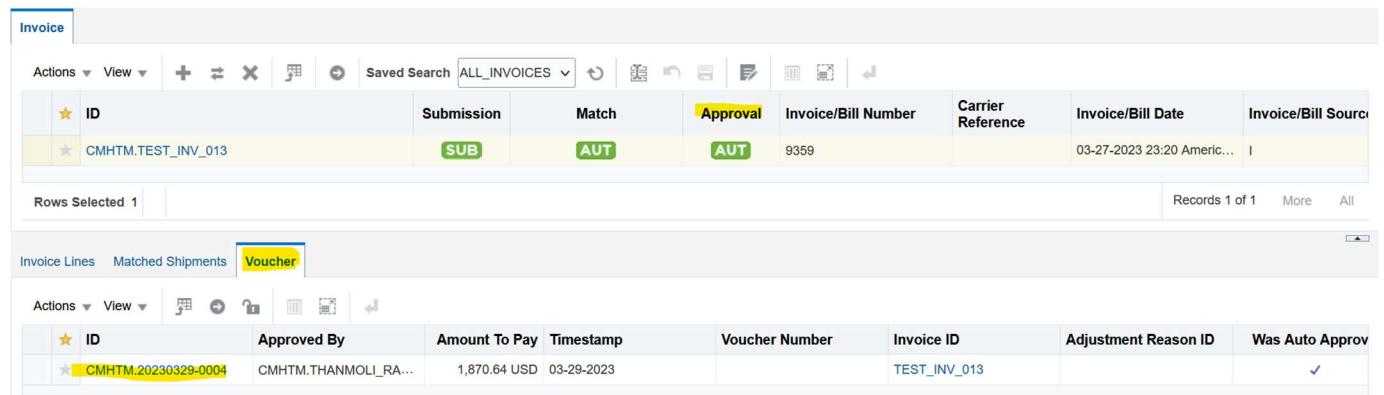
Once the Invoice is interfaced into OTM, Match Rule set up against the carrier will be validated and if it is satisfied, Invoice will be associated with the Shipment.



The screenshot shows the OTM interface with the 'Invoice' tab selected. The top table displays an invoice with ID 'CMHTM.TEST_INV_013', submission status 'SUB', match status 'AUT', approval status 'AUT', invoice/bill number '9359', carrier reference, invoice/bill date '03-27-2023 23:20 America/... I', and invoice/bill source. The bottom table shows a shipment with ID 'CMHTM.SH20230329-0038', shipment ID 'SH20230329-00...', indicator 'BTTI', service provider ID 'TRANSPORT', mode 'TL', total actual cost '1,959.93 USD', and total gross weight '23,800.00 LB'. The 'Matched Shipments' tab is highlighted.

Invoice Match status will be updated as 'AUT' since its automatically matched and the matched Shipment will be displayed under 'Matched Shipments' Tab.

If Invoice is approved automatically based on auto approval rules, Approval status of the Invoice will be updated as 'AUT'

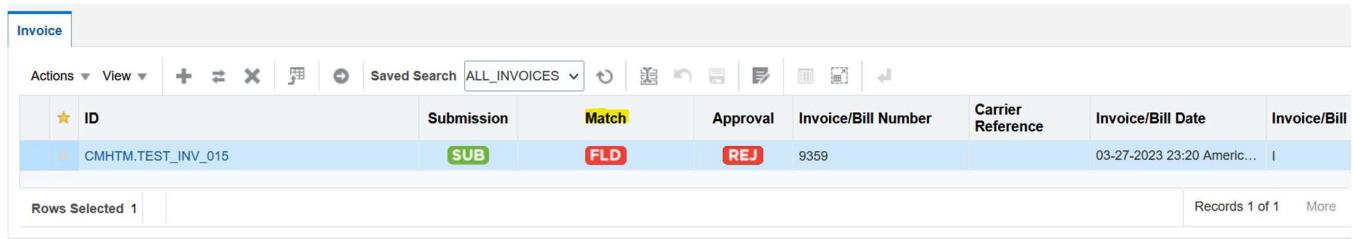


The screenshot shows the OTM interface with the 'Invoice' tab selected. The top table displays an invoice with ID 'CMHTM.TEST_INV_013', submission status 'SUB', match status 'AUT', approval status 'AUT', invoice/bill number '9359', carrier reference, invoice/bill date '03-27-2023 23:20 America/... I', and invoice/bill source. The bottom table shows a voucher with ID 'CMHTM.20230329-0004', approved by 'CMHTM.THANMOLI_RA...', amount to pay '1,870.64 USD', timestamp '03-29-2023', voucher number 'TEST_INV_013', invoice ID 'TEST_INV_013', adjustment reason ID, and was auto approved checked. The 'Voucher' tab is highlighted.

Vouchers will be automatically generated for approved invoices and it can be viewed under 'Voucher' Tab.

Match Failed Invoices

When an invoice interfaced to OTM fail to match with the Shipment, Invoice will get created in OTM, but the match status of the invoice will be updated as 'FLD'.



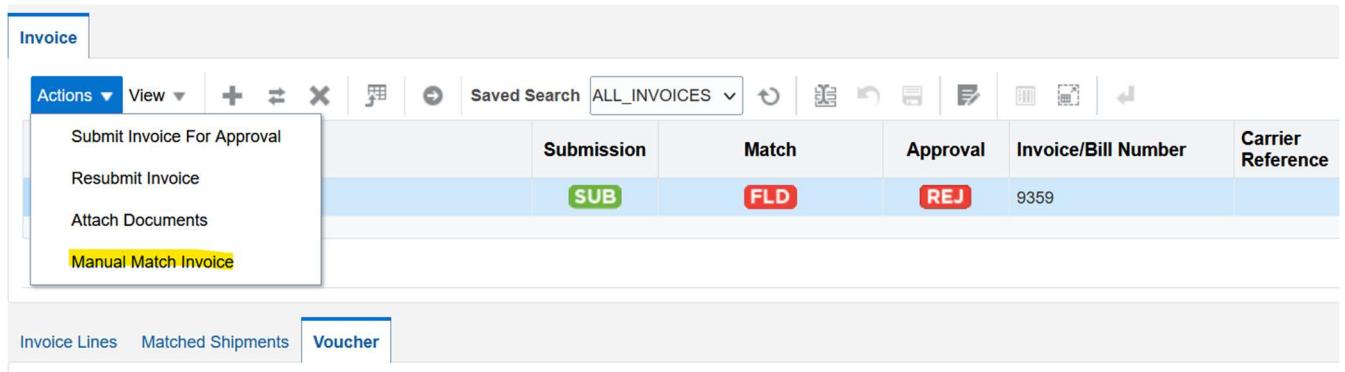
The screenshot shows a table with columns: ID, Submission, Match, Approval, Invoice/Bill Number, Carrier Reference, Invoice/Bill Date, and Invoice/Bill. A single row is selected, showing the following values:

ID	Submission	Match	Approval	Invoice/Bill Number	Carrier Reference	Invoice/Bill Date	Invoice/Bill
CMHTM.TEST_INV_015	SUB	FLD	REJ	9359		03-27-2023 23:20 Americ...	I

Rows Selected 1 | Records 1 of 1 | More

Manually Matched Invoices

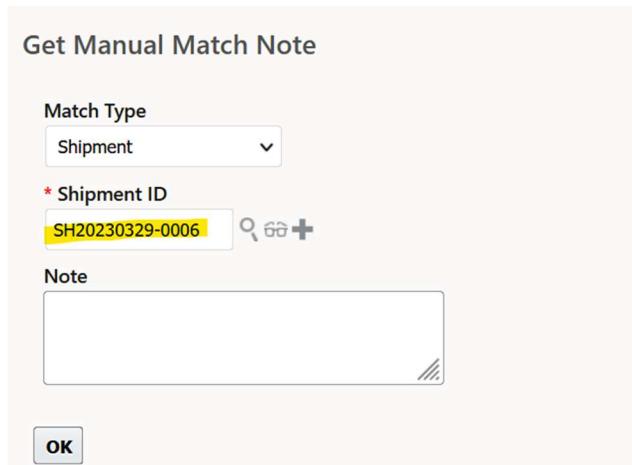
Finance Team can review the failed invoice and then manually match the invoice with the Shipment by directly entering the Shipment ID.



The screenshot shows a table with columns: Submission, Match, Approval, Invoice/Bill Number, and Carrier Reference. A context menu is open over the first row, listing the following options:

- Submit Invoice For Approval
- Resubmit Invoice
- Attach Documents
- Manual Match Invoice** (highlighted in yellow)

Below the table, there are tabs for Invoice Lines, Matched Shipments, and Voucher. The Voucher tab is selected.



The dialog box has the following fields:

- Match Type: Shipment
- * Shipment ID: SH20230329-0006
- Note: (empty text area)
- OK button

When Finance or Operations team manually match the Invoice against a Shipment, the match status of the Shipment will be updated as 'MAN'.

ID	Submission	Match	Approval	Invoice/Bill Number	Carrier Reference
CMHTM.TEST_INV_018	SUB	MAN	MGR	9359	

Rows Selected 1

Balance Due Invoices

When more than one invoice is interfaced against a Shipment, match status of the first Invoice will be 'AUT' (Auto-Matched Invoice), whereas the subsequent matched invoices will have a match status 'BAL' (Balance Due Invoice/Non-Original Invoice)

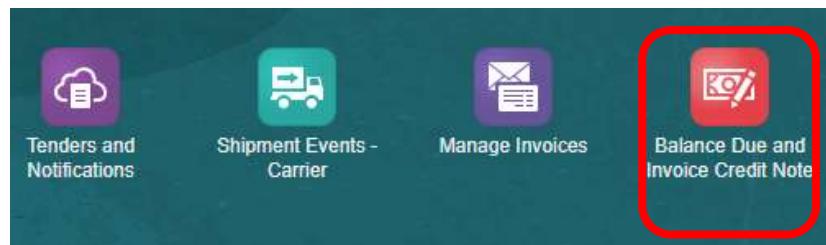
ID	Submission	Match	Approval	Invoice/Bill Number	Carrier Reference
CMHTM.TEST_INV_016	SUB	BAL	REJ	9359	

Rows Selected 1

Balance Due Invoice creation in OTM

Carrier can create Balance due invoices in OTM.

Step #1 - From your Oracle Menu, go to Balance Due and Invoice Credit Note



Step #2 - Click on New to create new invoice.

Invoice Finder

Invoice/Bill Voucher Details Order Base Order Release Stop Detail Status Audit

Invoice/Bill ID
 Begins With

Invoice/Bill Number
 Begins With

Serial Number
 Contains

Plant Number
 Contains

Reference Number Qualifier
 ▾
 2I
 6I
 ▾

Invoice Reference Number
 Begins With

Invoice/Bill Source
 ▾
 GC3
 Integration
 Manual

Shipment ID
 ▾ Begins With

Favorites
 Yes No Both

Search **New** Sort Order Actions Export Saved Query: ▾ Execute Query Actions Edit Save

Step #3 – Input required fields.: Invoice Number, OTM SCAC Code, Serial Number, Plant Number

- Serial number must be 6 digits with A or B at the end. Example, serial 85603 should be entered as 085603B.
- Plant Number is Oracle Plant number. All plants begin with proceeding “10” and then legacy plant number. Example, plant 941 is plant 10941.

Invoice Finder > Invoice

Invoice

Header Line Items

1 of 1 **New** Finished

ID	Number	Invoice Number 180614	Financial Consolidation Type STANDARD	Original Invoice ID
Service Provider ID	ANOK			
Amount Due	Credit Note <input type="checkbox"/>			
Invoice Source	Manual	Date Received 09-19-2023 12:26:30	Notes to Planner	Serial Number 085603B
Current	USD			
Plant Number	10941			

Top **Line Items**

Step #4 – Input line items on invoice. Click Line Items and then New Line Item.

Invoice Finder > Invoice

Invoice

1 of 1 New Finished

Header Line Items

ID Number TEST

Line Item Sequence	Cost Type	Description	Freight Charge	Accessorial Code

New Line Item

Top

Step #5 – Save the invoice. Click on finish and the Balance due invoice will be created. The Match status of the invoice will be ‘INV MATCH_BALANCE DUE’ and the INV APPROVAL status will be ‘INV APPROVAL REVIEW PENDING’.

Invoice Finder > Results

Results

Success

You successfully created the following records:

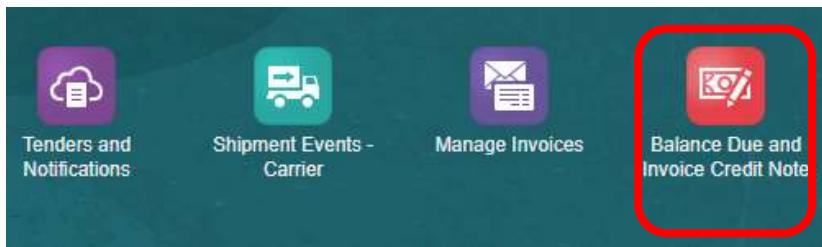
CMHTM.20230430-0007 View Edit View Log

Create Another Modify Another Actions

Credit Note Invoice creation in OTM

Carrier can create Credit Note invoices in OTM.

Step #1 - From your Oracle Menu, go to Balance Due and Invoice Credit Note



Step #2 - Click on New to create new invoice.

Invoice Finder

Invoice/Bill Voucher Details Order Base Order Release Stop Detail Status Audit

Invoice/Bill ID
 Begins With

Invoice/Bill Number
 Begins With

Serial Number
 Contains

Plant Number
 Contains

Reference Number Qualifier

Invoice Reference Number
 Begins With

Invoice/Bill Source

Shipment ID
 Begins With

Favorites
 Yes No Both

Search **New** Sort Order Actions Export Saved Query: Execute Query Actions Edit Save

Step #3 – Input required fields.: Invoice Number, OTM SCAC Code, Serial Number, Plant Number. Make sure to check the box for Credit Note.

- Serial number must be 6 digits with A or B at the end. Example, serial 85603 should be entered as 085603B.
- Plant Number is Oracle Plant number. All plants begin with proceeding “10” and then legacy plant number. Example, plant 941 is plant 10941.

Invoice Finder > Invoice

Invoice

Header Line Items

1 of 1 **New** Finished

ID Number	Invoice ID * Service Provider ID ANGK	Invoice Number 180614	Financial Consolidation Type STANDARD	Original Invoice ID
Amount Due	Credit Note <input type="checkbox"/>			
Invoice Source Manual	Invoice Date 09-19-2023 12:26:30	Date Received 09-19-2023 12:26:30	Notes to Planner <input type="text"/>	Serial Number 085603B
Currency USD	Plant Number 10941			

Top **Line Items**

Step #4 – Input line items on invoice. Click Line Items and then New Line Item. Input values as positive values. By selecting the credit note indicator on the previous screen, all values are interpreted as negative.

[Invoice Finder](#) > Invoice

Invoice

1 of 1 [New](#) [Finished](#)

Header [Line Items](#)

ID Number TEST

Line Item Sequence	Cost Type	Description	Freight Charge	Accessorial Code

[New Line Item](#)

[Top](#)

Step #5 – Save the invoice. Click on finish and the Balance due invoice will be created. The Match status of the invoice will be ‘INV MATCH_BALANCE DUE’ and the INV APPROVAL status will be ‘INV APPROVAL REVIEW PENDING’.

[Invoice Finder](#) > Results

Results

Success

You successfully created the following records:

CMHTM.20230430-0007 [View](#) [Edit](#) [View Log](#)

[Create Another](#) [Modify Another](#) [Actions](#)

How to View Match Status of EDI-Integrated Invoice

For EDI enabled carriers, Freight Payment type will be defined as ‘MATCH_PAY’ in OTM.

Service Provider ID ☆ 1 of 1 **New** **Finished** **Actions**

Service Provider ID Communication and Remarks

Service Provider/Location ID BTTI	Service Provider/Location Name BENNETT TRUCK TRANSPOR	Corporation ID <input type="text"/>									
Domain Name CMHTM	SCAC BTTI	Temporary <input type="checkbox"/> Status									
Reference Numbers <table border="1"> <tr> <td>* Reference Number Qualifier ID <input type="text"/> </td> <td>Reference Number <input type="text"/></td> <td>Save</td> </tr> <tr> <td>GLOG</td> <td>CMHTM.BTTI</td> <td> </td> </tr> <tr> <td>FREIGHT PAYMENT TYPE</td> <td>MATCH PAY</td> <td> </td> </tr> </table>			* Reference Number Qualifier ID <input type="text"/>	Reference Number <input type="text"/>	Save	GLOG	CMHTM.BTTI		FREIGHT PAYMENT TYPE	MATCH PAY	
* Reference Number Qualifier ID <input type="text"/>	Reference Number <input type="text"/>	Save									
GLOG	CMHTM.BTTI										
FREIGHT PAYMENT TYPE	MATCH PAY										

Whenever carrier sends an Invoice via EDI, OTM will auto match the invoice against the Shipment based on Match Rules set up in OTM.

Below Match Rule definition indicates that:

- Service Provider against the Invoice should EXACTLY match against the service provider of the Shipment.
- Either Shipment ID (SHIP_XID) or House Serial Number (SERIAL_NUMBER) in Invoice should be matched with the Shipment ID (SHIP_XID) or House Serial Number (SERIAL_NUMBER) against the Shipment.

Match Rule ☆ 1 of 1 **New** **Edit**

Match Rule ID CMH_MATCH_RULE	Match Rule Name CMH_MATCH_RULE	Match Rule Description																		
Match Rule Type INVOICE	Match Rule Outcome SHIPMENT																			
Match Rule Criteria <table border="1"> <tr> <td>Source Location Rule </td> <td>Destination Location Rule </td> <td>Consolidation Rule Type BOTH</td> <td>Find Shipments Type B</td> </tr> <tr> <td colspan="2"> Service Provider ID <table border="1"> <tr> <td>Exact Match </td> <td>Match Any in List </td> </tr> </table> </td> <td colspan="2"></td> </tr> <tr> <td colspan="4"> Match Invoice Reference Numbers To <table border="1"> <tr> <td>Match One Or More </td> <td>Match All </td> </tr> <tr> <td>Invoice Reference Number Qualifier ID CMHTM.SERIAL_NUMBER CMHTM.SHIP_XID</td> <td>Shipment Reference Number Qualifier ID CMHTM.SERIAL_NUMBER CMHTM.SHIP_XID</td> </tr> </table> </td> </tr> </table>			Source Location Rule	Destination Location Rule	Consolidation Rule Type BOTH	Find Shipments Type B	Service Provider ID <table border="1"> <tr> <td>Exact Match </td> <td>Match Any in List </td> </tr> </table>		Exact Match	Match Any in List			Match Invoice Reference Numbers To <table border="1"> <tr> <td>Match One Or More </td> <td>Match All </td> </tr> <tr> <td>Invoice Reference Number Qualifier ID CMHTM.SERIAL_NUMBER CMHTM.SHIP_XID</td> <td>Shipment Reference Number Qualifier ID CMHTM.SERIAL_NUMBER CMHTM.SHIP_XID</td> </tr> </table>				Match One Or More	Match All	Invoice Reference Number Qualifier ID CMHTM.SERIAL_NUMBER CMHTM.SHIP_XID	Shipment Reference Number Qualifier ID CMHTM.SERIAL_NUMBER CMHTM.SHIP_XID
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When both the above rules are satisfied, OTM will associate the Invoice with the Shipment. If the Invoice is eligible for auto-approval, OTM will auto approve the invoice and generate the voucher.

Below Shipment is built for House Serial Number 863593

Buy Shipment ★

1 of 1 New Finished Actions

Identification	Equipment	Stops	Financials	Involved Parties	Mode	Remarks	Groups and Charges	Tracking	Documents									
Shipment ID SH20230329-0038 Service Provider ID BTTI Origin 10929 Destination 213840																		
Origin 10929 OXFORD NC 27565 US					Destination 213840 DELMAR DE 19940 US													
Port of Load ID <input type="text"/> 🔍 ➕					Port of Discharge ID <input type="text"/> 🔍 ➕													
Driver ID	Secondary Driver ID	Power Unit ID	Work Assignment ID															
Reference Numbers <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 30%;">* Reference Number Qualifier ID</th> <th style="width: 30%;">Reference Number</th> <th style="width: 40%;">Description</th> </tr> </thead> <tbody> <tr> <td>GLOG</td> <td>CMHTM.SH20230329-0038</td> <td>G-LOG IDENTIFIER</td> </tr> <tr> <td>SERIAL_NUMBER</td> <td>863593</td> <td></td> </tr> </tbody> </table>										* Reference Number Qualifier ID	Reference Number	Description	GLOG	CMHTM.SH20230329-0038	G-LOG IDENTIFIER	SERIAL_NUMBER	863593	
* Reference Number Qualifier ID	Reference Number	Description																
GLOG	CMHTM.SH20230329-0038	G-LOG IDENTIFIER																
SERIAL_NUMBER	863593																	

Invoice interfaced by EDI Carrier (e.g.: BTTI) should also contain the same House Serial Number for a successful match.

Invoice ★

1 of 1 Finished Actions

Header	Involved Parties	Line Items	Routes/Ports	Stops	Summary	Summary Detail	Remarks									
ID TEST_INV_013 Number 9359																
Reference Numbers <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 30%;">* Reference Number Qualifier ID</th> <th style="width: 30%;">Reference Number</th> <th style="width: 40%;">Issue Date</th> </tr> </thead> <tbody> <tr> <td>SERIAL_NUMBER</td> <td>863593</td> <td><input type="text"/> Save</td> </tr> <tr> <td>GLOG</td> <td>CMHTM.TEST_INV_013</td> <td>03-29-2023</td> </tr> </tbody> </table>								* Reference Number Qualifier ID	Reference Number	Issue Date	SERIAL_NUMBER	863593	<input type="text"/> Save	GLOG	CMHTM.TEST_INV_013	03-29-2023
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SERIAL_NUMBER	863593	<input type="text"/> Save														
GLOG	CMHTM.TEST_INV_013	03-29-2023														

Reference Material

Glossary of Terms

Term	Definition
OTM	Oracle Transportation Management
HBF	Home Building Facility
Connect	This refers to Clayton's Fleet for Home Transport
Connect+	This refers to the long-term plan for centralized transportation management of all transportation activities for HBG.
Outbound	This refers to outbound shipment of finished goods (Home Transport) that does not flow through the centralized transportation team
Carrier Profile	This is a way to restrict planning for an order to be planned with either a 3rd party transporter or with Clayton Connect.
Service Provider / Carrier	Within OTM, these two terms represent our transporters or haulers. In OTM, they are frequently represented by the carrier's SCAC Code.
SCAC Code	Standard Carrier Alpha Code. This is a unique code used to identify a transportation company.
Source location	Typically, this is the plant that the shipment is picking up from. However, it can be any location from which a shipment is originating.
Consignee	For Home Transport, this is usually the retailer, community, or independent that placed the order.
Destination Location / Ship To	Typically, this is the actual location for the home delivery. However, it can be any location that a shipment is destined for.
Shipper	For Home Transport, this is usually the Home Building Facility.
Order Release	A unique Home Order. The Plant and Order Number from the AS400.
Shipment ID	A unique identifier in OTM to represent a single shipment, typically of one section of a home. For example, an order with 2 sections will create 2 unique shipment IDs.
Tracking Event	Pickup, Delivery, etc.... Any event that happens during the course of the shipment.
Early Pickup Date	This is usually the offline date from the AS400 unless overwritten within OTM. This indicates the earliest date that a section could be picked up for shipment.
Late Pickup Date	This is usually the estimated offline date from the AS400 unless overwritten within OTM. This indicates the latest date that a section could be picked up for shipment.
Early Delivery Date	This is usually blank unless updated within OTM. This indicates the earliest that a section could be delivered to the retailer location.
Late Delivery Date	This is usually blank unless updated within OTM. This indicates the latest that a section could be delivered to the retailer location.
Tender	This is a request to a carrier to haul a shipment.
Resource Status	This is the status to indicate whether a shipment has been tendered to a carrier and whether the carrier has accepted or rejected the tender.
Transport Status	This is the status to indicate where a shipment is. Typically the indicators will represent that the shipment has not started, is en route, or has completed.
Shipment Approval Status	This is the status to indicate whether a shipment has been approved or not prior to invoicing. If additional cost is incurred during transit, those costs can be reviewed and approved prior to receiving an invoice from a transporter.

Status Indicators

Resources

Indicator	Description
--	Blank. Tender offer not sent.
TEN	Tendered. Tender offer sent, no response.
ACC	Accepted. Tender offer accepted by carrier.
REJ	Rejected. Tender offer rejected by carrier.
W/D	Withdrawn. Tender offer withdrawn from carrier. Needs to be resubmitted.

Transport Status

Indicator	Description
	Blank. Shipment has not started.
ENR	Enroute. Shipment has departed but is not complete.
CPL	Complete. Shipment has reached its destination and is complete.

Approval Status

Indicator	Description
	Blank. Approval not available.
--	Pending Review. Approval needed.
CPL	Complete. Shipment approval complete.
REJ	Rejected. Shipment cost rejected.

Match

Indicator	Description
	Blank. No invoice to match.
AUT	Authorized. Invoice matched to shipments.
FLD	Failed. Invoice did not match any shipments. Needs to be matched.
BAL	Balance Due invoice.

Submission

Indicator	Description
--	Blank. No invoice submitted.
SUB	Submitted. Invoice received.

Approval

Indicator	Description
--	Blank. Invoice has not been reviewed.
AUT	Authorized. Invoice has been approved.
REJ	Rejected. Invoice has been rejected and needs review.
MGR	Manager approval required.
MAN	Manager approved. No further action.