



ORACLE TRANSPORTATION MANAGEMENT (OTM)

Clayton Homes Carrier Resource Guide

Version
V1_10252023

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Introduction

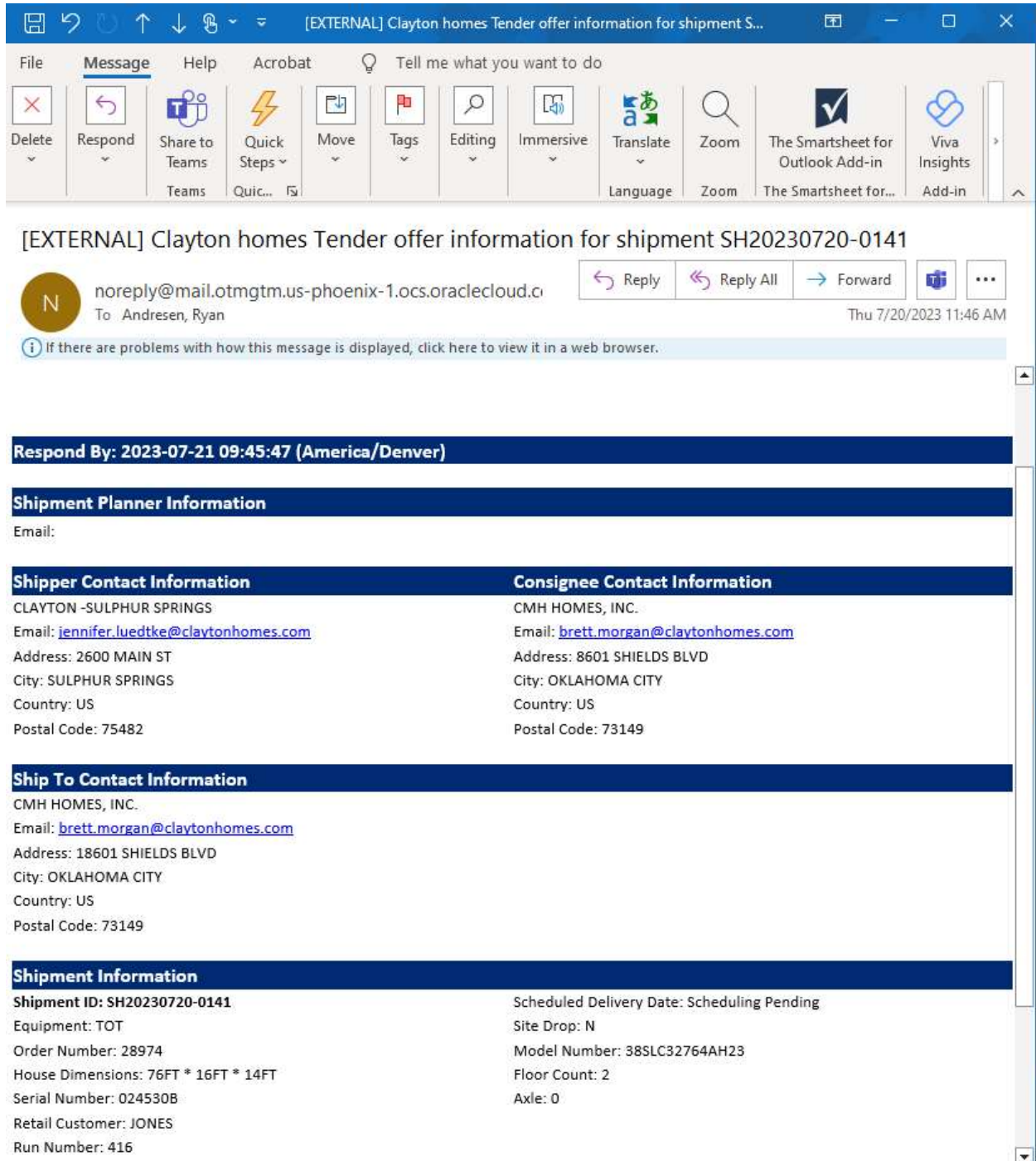
Clayton has been embarking on a journey to modernize its technology and one of those initiatives is to improve how we plan, schedule, and ship our homes to our retail and community partners. We have selected Oracles Transportation Management System (TMS) to improve the overall home transport experience. 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.

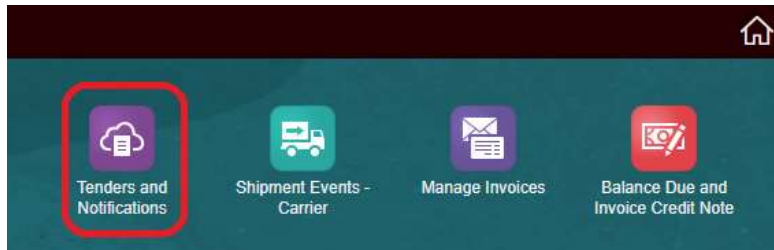
Order Tendering

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.



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”. Not 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		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		Destination Province Code	Begins With
Tender Offer Status		Total Ship Unit Count	=
Favorites		Indicator	

ACCEPTED
REJECTED
CONDITIONALLY ACCEPTED
PARTIALLY ACCEPTED

OUTSTANDING
TENDER OPEN
PICKUP NOTIFICATION
MODIFIED

☐ Yes ☐ No ☒ Both

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

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

ORACLE

Transportation and Global Trade Management

Online Booking/Tendering

Total Found: 44

Actions

<input checked="" type="checkbox"/>	★	ID	Status	Serial Num...	Origin Location Name	Origin City	State/Province Code	Destination Location ...	Destination City	State/Pr
<input type="checkbox"/>	☆	24669	TEN	010357A	Clayton -Albuquerque	ALBUQUERQUE	NM	CMH HOMES, INC.	EVANS	CO
<input type="checkbox"/>	☆	24674	TEN	010321B	Clayton -Albuquerque	ALBUQUERQUE	NM	FIESTA MOBILE HOM...	LAS CRUCES	NM
<input type="checkbox"/>	☆	13203	ACC	056989A	Clayton -Nashville	NASHVILLE	NC	WHITE, EBBIE OSCAR	RICHLANDS	NC
<input type="checkbox"/>	☆	14526	ACC	032569B	Clayton - Addison II	ADDISON	AL	CMH HOMES, INC.	ANNISTON	AL
<input type="checkbox"/>	☆	14528	ACC	032569B	Clayton - Addison II	ADDISON	AL	CMH HOMES, INC.	ANNISTON	AL
<input type="checkbox"/>	☆	14775	ACC	040531A	APPALACHIA	ANDERSONVILLE	TN	CMH HOMES, INC.	BOWLING GREEN	KY
<input type="checkbox"/>	☆	14777	ACC	040531B	APPALACHIA	ANDERSONVILLE	TN	CMH HOMES, INC.	BOWLING GREEN	KY
<input type="checkbox"/>	☆	24637	TEN	010365B	Clayton -Albuquerque	ALBUQUERQUE	NM	CMH HOMES, INC.	EVANS	CO
<input type="checkbox"/>	☆	24710	TEN	084968B	Clayton -Russellville	RUSSELLVILLE	AL	CMH HOMES, INC.	GREENVILLE	AL
<input type="checkbox"/>	☆	24712	TEN	017972A	CLAYTON - ADDISON	ADDISON	AL	CMH HOMES, INC.	JOPLIN	MO
<input type="checkbox"/>	☆	24770	ACC	040684B	APPALACHIA	ANDERSONVILLE	TN	CMH HOMES, INC.	BOWLING GREEN	KY
<input type="checkbox"/>	☆	24835	TEN	026933B	CLAYTON -SULPHUR ...	SULPHUR SPRINGS	TX	U.S.A. U-SAVE HOME...	PARIS	TX
<input type="checkbox"/>	☆	24840	TEN	024523B	CLAYTON -SULPHUR ...	SULPHUR SPRINGS	TX	ROBERTS FAMILY HO...	SEGUIN	TX
<input type="checkbox"/>	☆	24820	TEN	010310A	Clayton -Albuquerque	ALBUQUERQUE	NM	CMH HOMES, INC.	SNOWFLAKE	AZ
<input type="checkbox"/>	☆	24638	TEN	084972B	Clayton -Russellville	RUSSELLVILLE	AL	DICK MOORE INCOR...	MILLINGTON	TN
<input type="checkbox"/>	☆	24643	TEN	010349A	Clayton -Albuquerque	ALBUQUERQUE	NM	HOMES DIRECT OF A...	BUCKEYE	AZ
<input type="checkbox"/>	☆	24679	TEN	017950A	CLAYTON - ADDISON	ADDISON	AL	DRAIN & LOVOY	CULLMAN	AL
<input type="checkbox"/>	☆	24844	TEN	024530A	CLAYTON -SULPHUR ...	SULPHUR SPRINGS	TX	CMH HOMES, INC.	OKLAHOMA CITY	OK
<input type="checkbox"/>	☆	24834	TEN	026933A	CLAYTON -SULPHUR ...	SULPHUR SPRINGS	TX	U.S.A. U-SAVE HOME...	PARIS	TX
<input type="checkbox"/>	☆	24841	TEN	024523A	CLAYTON -SULPHUR ...	SULPHUR SPRINGS	TX	ROBERTS FAMILY HO...	SEGUIN	TX
<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 Tender Acceptance Status NO RESPONSE Origin Location CLAYTON - SULPHUR SPRINGS 2600 MAIN ST SULPHUR SPRINGS, TX 75482, US Destination Location CMH HOMES, INC. 8601 SHIELDS BLVD OKLAHOMA CITY, OK 73149, US Total Weight 33100.00 LB Temperature Controlled △ Tender Type Ordinary Tender ID 24844 Driver ID Weight Utilization 0.331	Respond By 07-21-2023 11:45 America/New_York Responding User Pickup Date 07-20-2023 09:49 America/Chicago Delivery Date 07-20-2023 14:14 America/Chicago Total Volume 1.00 CUFT Total Number of Stops 2 Total Net Weight 33100.00 LB Loaded Distance 271 Secondary Driver ID Volume Utilization 1.0E-5	Service Provider ID CMHTMLANGK Service Provider Name A&G COMMERCIAL TRUCKING Tender Response Time Shipment Cost 2,409.05 USD Hazardous Materials N Total Net Volume 1.00 CUFT Unloaded Distance 0.00 Power Unit ID Equipment Reference Unit Utilization 1.0
--	---	---

Comments

Shipping Instructions

More Shipment Information

Total Shipping Spaces

Reference Numbers

Shipment Reference Number Qualifier	Shipment Reference
CNIGHTMATE DESK	N

Accept Decline Analyze Tender Performance 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?

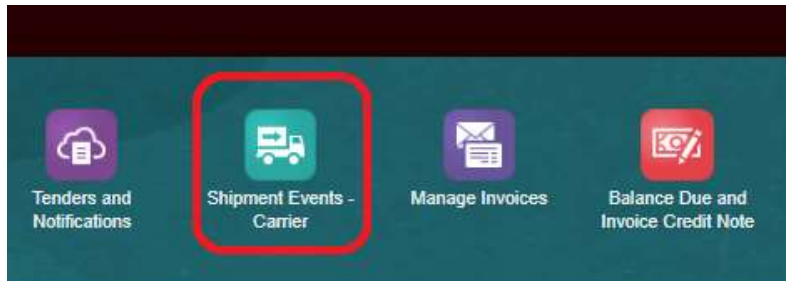
To keep up with all shipments, we are asking our partners to provide as close to real time as possible updates on when our orders ship from our home building facilities and also when delivery has been completed. There are 4 main shipping events we are asking you to update on each order.

- 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 wit 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”

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

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'

Invoice								
Actions View + - X [Grid Icon] [Refresh Icon] Saved Search ALL_INVOICES [Refresh Icon] [Print Icon] [Export Icon] [Import Icon] [Filter Icon]								
ID	Submission	Approval	Invoice/Bill Number	Carrier Reference	Invoice/Bill Date	Invoice/Bill Source	Service Provider	
★ CMHTM.20230327-0001	--		ANGK-000008		03-27-2023 04:28 Americ...	G	ANGK	
Rows Selected 1							Records 1 of 1 More	

Invoice Lines Matched Shipments Voucher							
Actions View [Grid Icon] [Refresh Icon] [Print Icon] [Export Icon] [Import Icon] [Filter Icon]							
ID	Type	Freight Charge	Accessorial Code ID	Accessorial Description	Unit Count	Transport Handling Unit	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'

Invoice							
Actions View + - X [Grid Icon] [Refresh Icon] Saved Search ALL_INVOICES [Refresh Icon] [Print Icon] [Export Icon] [Import Icon] [Filter Icon]							
ID	Submission	Match	Approval	Invoice/Bill Number	Carrier Reference	Invoice/Bill Date	
★ CMHTM.20230327-0001	SUB	AUT	AUT	ANGK-000008		03-27-2023 04:28 Americ...	

Invoice							
Actions View + - X [Grid Icon] [Refresh Icon] Saved Search ALL_INVOICES [Refresh Icon] [Print Icon] [Export Icon] [Import Icon] [Filter Icon]							
<div>Submit Invoice For Approval</div> <div>Resubmit Invoice</div> <div>Attach Documents</div>							
ID	Submission	Approval	Invoice/Bill Number	Carrier Reference	Invoice/Bill Date		
	--		ANGK-000008		03-27-2023 04:28 Americ...		

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.

Invoice

ActionsView+≡✕📄🔄Saved SearchALL_INVOICES🔄🔍📄📄📄📄📄📄

★ID	Submission	Match	Approval	Invoice/Bill Number	Carrier Reference	Invoice/Bill Date	Invoice/Bill Source
🔍CMHTM.TEST_INV_013	SUB	AUT	AUT	9359		03-27-2023 23:20 Americ...	I

Rows Selected 1Records 1 of 1MoreAll

Invoice LinesMatched ShipmentsVoucher

ActionsView📄🔄🔍📄📄📄📄📄📄

★ID	Shipment ID	Indicator	Service Provider ID	Shipment Type	Mode	Carrier Reference	Total Actual Cost	Total Gross Weight
🔍CMHTM.SH20230329-0038	SH20230329-00...	🕒	BTTI	TRANSPORT	TL		1,959.93 USD	23,800.00 LB

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'

Invoice										
Actions View + = X [Grid Icon] [Refresh Icon] [Print Icon] [Export Icon] [Import Icon] [Filter Icon]										
Saved Search ALL_INVOICES [Refresh Icon] [Filter Icon]										
ID	Submission	Match	Approval	Invoice/Bill Number	Carrier Reference	Invoice/Bill Date	Invoice/Bill Source			
CMHTM.TEST_INV_013	SUB	AUT	AUT	9359		03-27-2023 23:20 Americ...	I			
Rows Selected 1							Records 1 of 1 More All			
Invoice Lines Matched Shipments Voucher										
Actions View [Grid Icon] [Refresh Icon] [Print Icon] [Export Icon] [Import Icon] [Filter Icon]										
ID	Approved By	Amount To Pay	Timestamp	Voucher Number	Invoice ID	Adjustment Reason ID	Was Auto Approv			
CMHTM.20230329-0004	CMHTM.THANMOLI_RA...	1,870.64 USD	03-29-2023		TEST_INV_013		✓			

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'.

Invoice							
Actions View + = X [Grid Icon] [Refresh Icon] Saved Search ALL_INVOICES [Refresh Icon] [Print Icon] [Export Icon] [Import Icon] [Filter Icon]							
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.

Invoice

Actions

View

Saved Search

ALL_INVOICES

Submit Invoice For Approval

Resubmit Invoice

Attach Documents

Manual Match Invoice

Submission	Match	Approval	Invoice/Bill Number	Carrier Reference
SUB	FLD	REJ	9359	

Invoice Lines

Matched Shipments

Voucher

Get Manual Match Note

Match Type
Shipment

* Shipment ID
SH20230329-0006

Note

OK

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

Invoice

Actions View + = X [Grid] ↻ Saved Search ALL_INVOICES [Refresh] [Print] [Export CSV] [Import CSV]

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

Rows Selected 1

Invoice Lines Matched Shipments Voucher

Actions View [Grid] ↻ 🔒 [Print] [Export CSV] [Import CSV]

						Carrier

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

- 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 1 of 1 New Finished

Header Line Items

ID Number

Invoice ID Invoice Number Financial Consolidation Type Original Invoice ID

* Service Provider ID ANGK

Amount Due Credit Note ☐

Invoice Source Manual

* Invoice Date 09-19-2023 12:28:30 * Date Received 09-19-2023 12:28:30

Currency USD Notes to Planner * Serial Number 085603B

* 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:

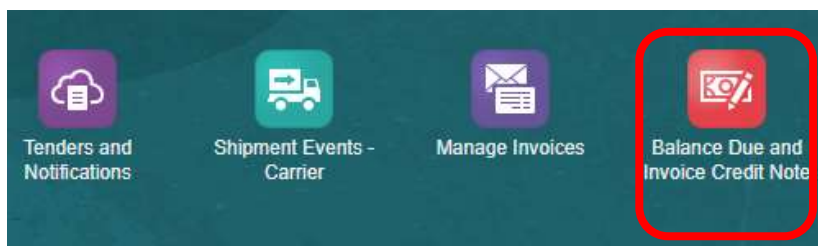
☐ CMHTM.20230430-0007 ☆ View Edit View Log

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 1 of 1 **New** **Finished**

Header | Line Items

ID: Number

Invoice ID: 180614

* Invoice Number: 180614

* Financial Consolidation Type: STANDARD

Original Invoice ID:

* Service Provider ID: ANGK

Amount Due:

Credit Note: ☐

Invoice Source: Manual

* Invoice Date: 09-19-2023 12:26:30

* Date Received: 09-19-2023 12:26:30

Currency: USD

* Plant Number: 10941

Notes to Planner:

* Serial Number: 085603B

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: 🔍 ⚙️ +

Domain Name: CMHTM SCAC: BTTI 🔍 ⚙️ + Temporary: ☐ **Status**

▲ Reference Numbers

* Reference Number Qualifier ID	Reference Number	
<input type="text"/> 🔍 ⚙️ +	<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

Source Location Rule: Destination Location Rule: Consolidation Rule Type: BOTH Find Shipments Type: B

▲ [Service Provider ID](#)

[Exact Match](#) [Match Any in List](#)

▲ [Match Invoice Reference Numbers To](#)

[Match One Or More](#) [Match All](#)

Invoice Reference Number Qualifier ID	Shipment Reference Number Qualifier ID
CMHTM.SERIAL_NUMBER	CMHTM.SERIAL_NUMBER
CMHTM.SHIP_XID	CMHTM.SHIP_XID

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 1NewFinishedActions

Identification

EquipmentStopsFinancialsInvolved PartiesModeRemarksGroups and ChargesTrackingDocuments

Shipment ID SH20230329-0038Service Provider ID BTTIOrigin 10929Destination 213840

Origin

10929

OXFORD NC 27565

US

Destination

213840

DELMAR DE 19940

US

Port of Load ID

🔍🔗+

Port of Discharge ID

🔍🔗+

Driver ID

Secondary Driver ID

Power Unit ID

Work Assignment ID

▲ Reference Numbers

* 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 1FinishedActions

Header

Involved PartiesLine ItemsRoutes/PortsStopsSummarySummary DetailRemarks

ID TEST_INV_013Number 9359

▲ Reference Numbers

* Reference Number Qualifier ID	Reference Number	Issue Date	
SERIAL_NUMBER	863593		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.
	Tendered. Tender offer sent, no response.
	Accepted. Tender offer accepted by carrier.
	Rejected. Tender offer rejected by carrier.
	Withdrawn. Tender offer withdrawn from carrier. Needs to be resubmitted.




Transport Status

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



Approval Status

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






Match

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

Submission

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

Approval

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