TRANSPORT PRO

How EDI Works

TRANSPORT PRO

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Introduction

This guide explains how EDI works in Transport Pro, and covers EDI maps 204/990 (load tender and response), 210 (billing), and 214 (customer updates). Note that some items may vary slightly depending on your trading partners' requirements. If you have any questions about EDI, please reach out to our technical team at support@transportpro.net.

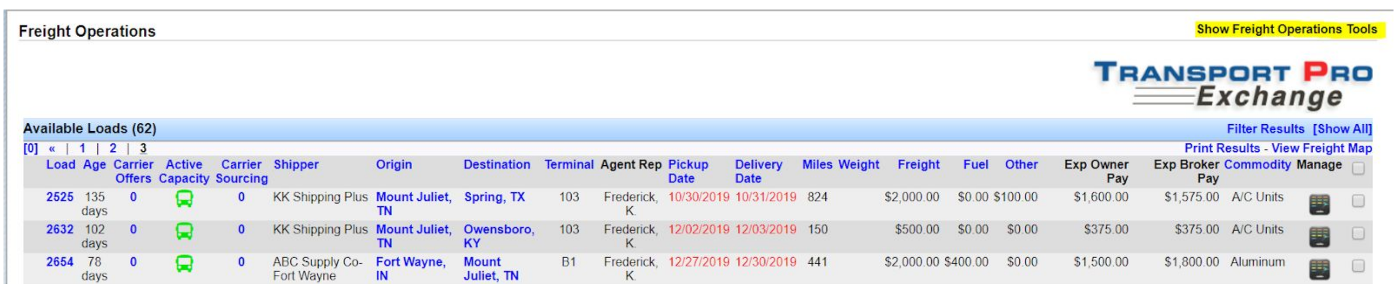
EDI 204/990 - Load Tender/Response

You will first determine which members of your internal team need to receive load tender notifications, and then send that information to our technical team. Our engineers will set those users up to receive email notifications when a load is tendered.

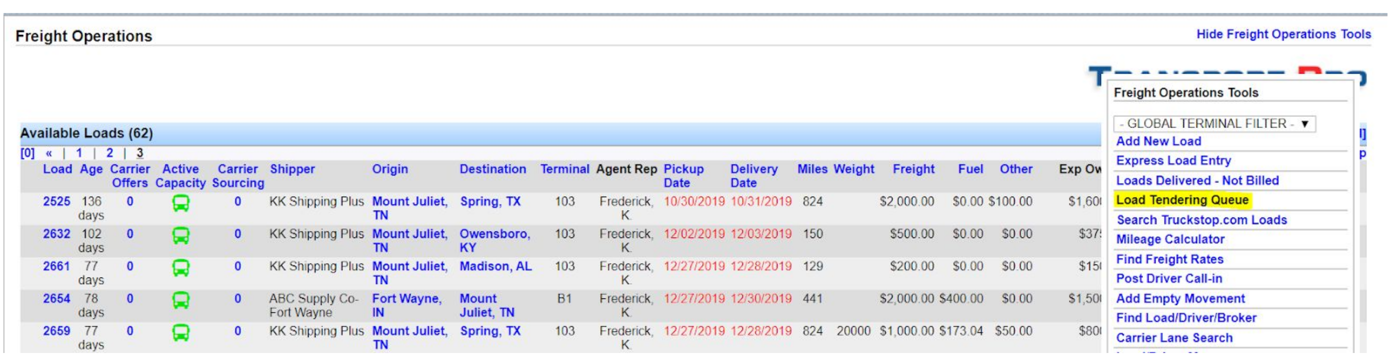
NOTE: In order for a user to receive this email notification, they **MUST** have an active user account in Transport Pro.

Access and Review Tendered Loads in Transport Pro:

To access and review the loads in the tendering queue in Transport Pro, click the "Show Freight Operations Tools" link in the upper right-hand corner of the Freight Ops Dashboard.

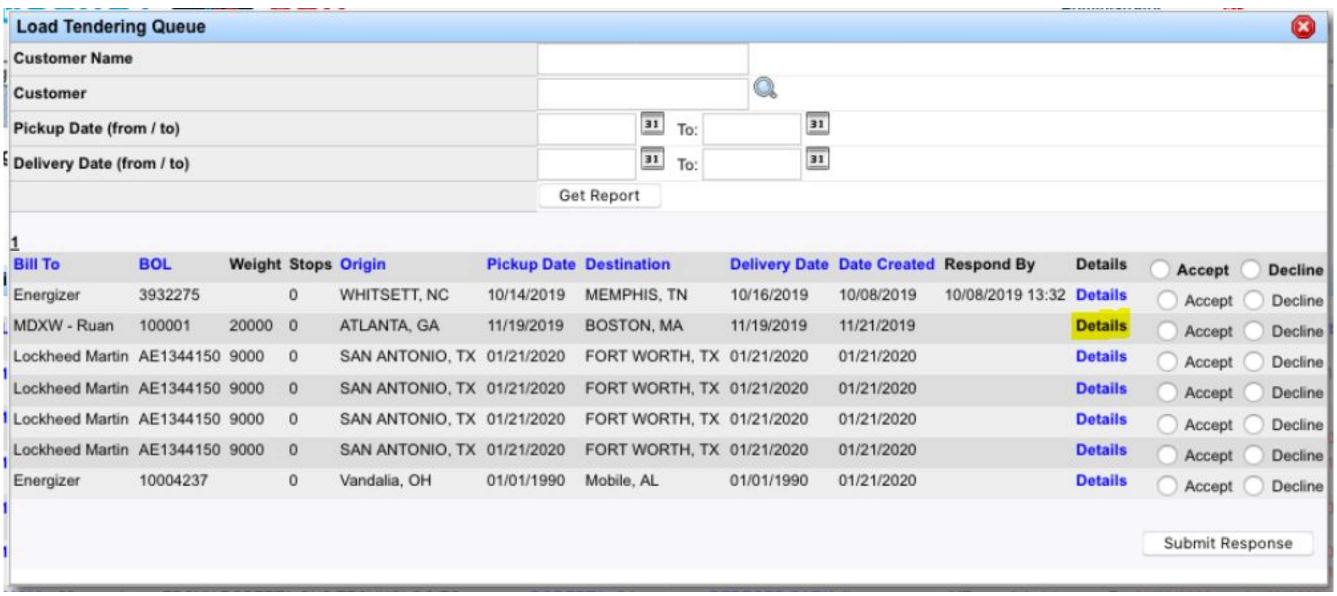


When you click on this link, you will see a link for the "Load Tendering Queue." Click this to open up the queue and view the loads.



You will see the tendered loads in this queue, which will display some general information. If you click on the “Details” link, you will be able to see additional information including all the stops, pickup and delivery dates, reference information, and any notes if they’ve been added.

NOTE: Typically, rates do **NOT** come over.



Load Tendering Queue

Customer Name	
Customer	
Pickup Date (from / to)	To:
Delivery Date (from / to)	To:
	Get Report

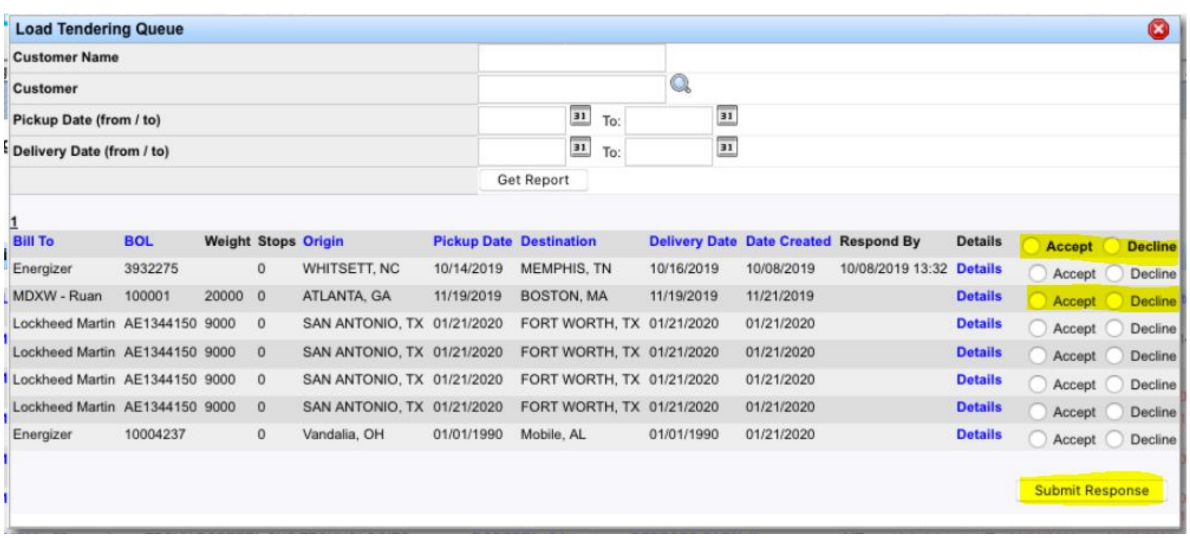
1

Bill To	BOL	Weight	Stops	Origin	Pickup Date	Destination	Delivery Date	Date Created	Respond By	Details	Accept	Decline
Energizer	3932275		0	WHITSETT, NC	10/14/2019	MEMPHIS, TN	10/16/2019	10/08/2019	10/08/2019 13:32	Details	Accept	Decline
MDXW - Ruan	100001	20000	0	ATLANTA, GA	11/19/2019	BOSTON, MA	11/19/2019	11/21/2019		Details	Accept	Decline
Lockheed Martin	AE1344150	9000	0	SAN ANTONIO, TX	01/21/2020	FORT WORTH, TX	01/21/2020	01/21/2020		Details	Accept	Decline
Lockheed Martin	AE1344150	9000	0	SAN ANTONIO, TX	01/21/2020	FORT WORTH, TX	01/21/2020	01/21/2020		Details	Accept	Decline
Lockheed Martin	AE1344150	9000	0	SAN ANTONIO, TX	01/21/2020	FORT WORTH, TX	01/21/2020	01/21/2020		Details	Accept	Decline
Lockheed Martin	AE1344150	9000	0	SAN ANTONIO, TX	01/21/2020	FORT WORTH, TX	01/21/2020	01/21/2020		Details	Accept	Decline
Energizer	10004237		0	Vandalia, OH	01/01/1990	Mobile, AL	01/01/1990	01/21/2020		Details	Accept	Decline

Submit Response

Accept or Decline Tendered Loads:

Once you’ve reviewed the load information, you can either accept or reject the load(s) and submit the response. From the Load Tendering Queue, click the appropriate bubble next to each load. If you want to accept or decline all loads in this queue, you can simply check the bubble at the top of the column to select all loads at once. Be sure to click “Submit Response” when done.



Load Tendering Queue

Customer Name	
Customer	
Pickup Date (from / to)	To:
Delivery Date (from / to)	To:
	Get Report

1

Bill To	BOL	Weight	Stops	Origin	Pickup Date	Destination	Delivery Date	Date Created	Respond By	Details	Accept	Decline
Energizer	3932275		0	WHITSETT, NC	10/14/2019	MEMPHIS, TN	10/16/2019	10/08/2019	10/08/2019 13:32	Details	Accept	Decline
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Lockheed Martin	AE1344150	9000	0	SAN ANTONIO, TX	01/21/2020	FORT WORTH, TX	01/21/2020	01/21/2020		Details	Accept	Decline
Lockheed Martin	AE1344150	9000	0	SAN ANTONIO, TX	01/21/2020	FORT WORTH, TX	01/21/2020	01/21/2020		Details	Accept	Decline
Lockheed Martin	AE1344150	9000	0	SAN ANTONIO, TX	01/21/2020	FORT WORTH, TX	01/21/2020	01/21/2020		Details	Accept	Decline
Lockheed Martin	AE1344150	9000	0	SAN ANTONIO, TX	01/21/2020	FORT WORTH, TX	01/21/2020	01/21/2020		Details	Accept	Decline
Energizer	10004237		0	Vandalia, OH	01/01/1990	Mobile, AL	01/01/1990	01/21/2020		Details	Accept	Decline

Submit Response

When you accept the load(s) via the Load Tendering Queue, the load(s) will automatically be added for you as an available load, and will show in the “Available Loads” section on the Freight Operations Dashboard.

NOTE: Again, the rates do not typically come over, so you will need to edit the load at some point and add the rate. Adding the rate does not send an update to the trading partner. There is no back and forth via EDI in this regard.

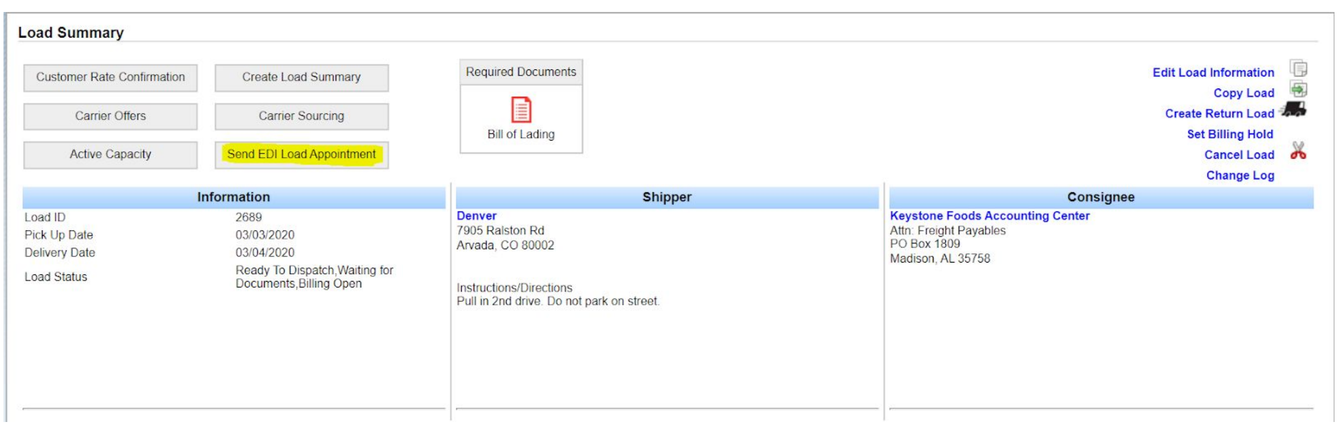
vailable Loads (62) Filter Results [Show All]

]] « | 1 | 2 | 3 Print Results - View Freight Map

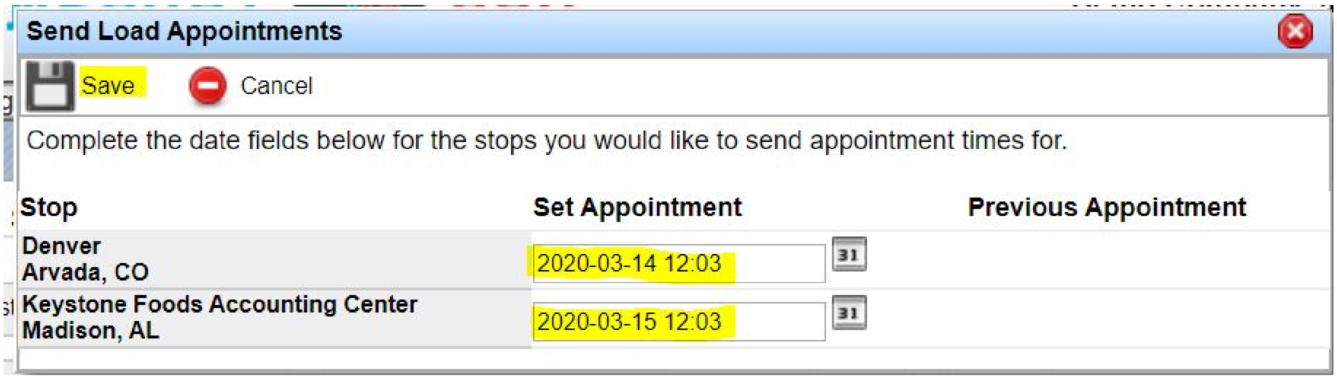
Load	Age	Carrier Offers	Active Capacity	Carrier Sourcing	Shipper	Origin	Destination	Terminal	Agent Rep	Pickup Date	Delivery Date	Miles	Weight	Freight	Fuel	Other	Exp Owner Pay	Exp Broker Pay	Commodity	Manage
2525	136 days	0		0	KK Shipping Plus	Mount Juliet, TN	Spring, TX	103	Frederick, K.	10/30/2019	10/31/2019	824		$2,000.00	$0.00	$100.00	$1,600.00	$1,575.00	A/C Units	
2632	102 days	0		0	KK Shipping Plus	Mount Juliet, TN	Owensboro, KY	103	Frederick, K.	12/02/2019	12/03/2019	150		$500.00	$0.00	$0.00	$375.00	$375.00	A/C Units	
2661	77 days	0		0	KK Shipping Plus	Mount Juliet, TN	Madison, AL	103	Frederick, K.	12/27/2019	12/28/2019	129		$200.00	$0.00	$0.00	$150.00	$150.00	A/C Units	
2660	77 days	1		0	ABCDE	Mt. Juliet, TN	Madison, AL	103	Frederick, K.	12/27/2019	12/28/2019	1231	20000	$1,500.00	$258.51	$100.00	$1,225.00	$1,393.88	A/C Units	
2659	77 days	0		0	KK Shipping Plus	Mount Juliet, TN	Spring, TX	103	Frederick, K.	12/27/2019	12/28/2019	824	20000	$1,000.00	$173.04	$50.00	$800.00	$917.28	A/C Units	
2654	78 days	0		0	ABC Supply Co-Fort Wayne	Fort Wayne, IN	Mount Juliet, TN	B1	Frederick, K.	12/27/2019	12/30/2019	441		$2,000.00	$400.00	$0.00	$1,500.00	$1,800.00	Aluminum	
2668	50 days	0		0		MOUNT JULIET, TN	DETROIT, MI	103	Frederick, K.	01/23/2020	01/24/2020	548		$300.00	$60.00	$0.00	$225.00	$270.00		
2670	49 days	1		2	KK Shipping Plus	Mount Juliet, TN	Madison, AL	103	Frederick, K.	01/24/2020	01/25/2020	129	20000	$0.00	$0.00	$0.00	$0.00	$0.00	A/C Units	
2689	10 days	1		0	Denver	Arvada, CO	Madison, AL	119	Drummond, K.	03/03/2020	03/04/2020	1272	20000	$1,000.00	$0.00	$50.00	$800.00	$787.50	Brick	

Sending Load Appointments:

Sending load appointments is done from the Load Summary screen. You will see a tab in the upper left-hand corner that says “Send EDI Load Appointment.” Click this tab.



Set the dates and times and click “Save Record.” Any time you open this window to make an update, the previous appointment times will show as well.



Updates After Accepting a Load:

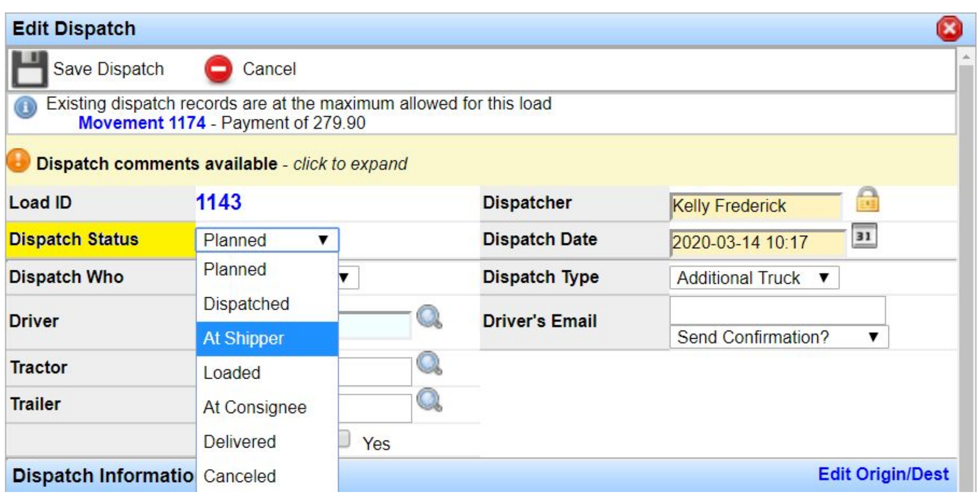
There are only two pieces of information that will auto-update if changes are made after you’ve accepted the load: 1) The dates, and 2) If a load is canceled.

EDI 214 - Customer Updates

Different customers may have different requirements when it comes to updates. For example, maybe some customers require updates every 15 minutes, while others require an update every 2 hours. We’ll review where these settings are controlled and how the updates get sent.

Load Status Updates:

In addition to location updates, dispatchers are also monitoring the status updates on a load (i.e. At Shipper, Loaded, Delivered). Transport Pro is designed to automatically send any status updates to your EDI customers. So when the status is updated on the dispatch record, that notification is sent.

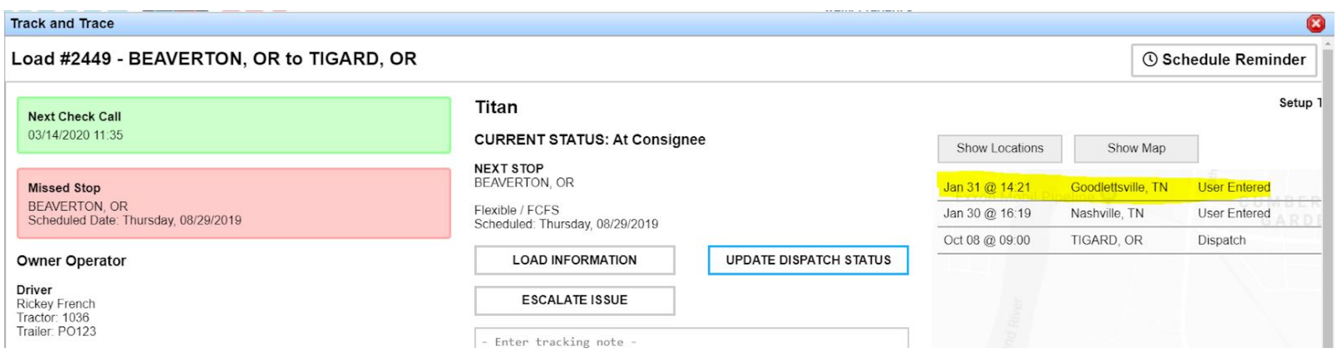


Sending Location Updates with ELD or Tracking Services Enabled:

For trading partners who require shipment location updates, Transport Pro will automatically send these 214 status updates based on the Notification Frequency set on the customer record. Transport Pro will monitor load locations from Omnitracs, MacroPoint, or any other location provider you subscribe to, and send those locations to the trading partner. This includes manual check calls entered by dispatchers in Transport Pro.

NOTE: This information flows into Transport Pro and shows on the Freight Operations Dashboard as well as in the Track & Trace window. When the location pings come through your Transport Pro system, they come over in whatever time zone your main office is located in. So, if your company is headquartered in Florida, for example, you'll see the pings show up in Eastern Time. We set your Transport Pro installation to your time zone when you get started with us.

When the location updates are sent to the customer via the tracking service, their EDI system does the time zone conversion.



Dispatched Loads (62) — Filter Results [Show All]

1 | 2 | 3 | » [3] — Print Results - View Freight Map

Load	Status	Dispatched	Tractor	Trailer	Shipper	Origin	Destination	Terminal	Pickup Date	Delivery Date	Next Action Date	Check Date	Miles	Commodity	Last Location	ETA	Manage
2455	Loaded	tom jack	1067	1024	Kross Freeight	Philadelphia, PA	Greenwood Village, CO	ADT	09/25/2019 08:43	08/23/2019 - 09/25/2019 08:43	09/25/2019 08:43	11/26/2019 14:51	2386	A/C Units		03/14 10:37 0 miles	
2652	At Shipper	Donald Brown	1234RD		ABC Supply Co-Fort Wayne	Fort Wayne, IN	Mount Juliet, TN	B1	12/27/2019	12/30/2019	12/30/2019 00:00	02/11/2020 11:10	441	Aluminum	Mt. Juliet, TN 02/11 10:10	03/14 18:29 431 miles	
2674	Loaded	Robert Shrute	1048	1001		Mount Juliet, TN	NOVI, MI	103	01/30/2020	01/31/2020	01/31/2020 00:00	02/11/2020 18:20	558		Nashville, TN 03/13 13:13	03/14 20:37 546 miles	
2680	At Consignee	Rickey French	1036	1046	RSC	Mason, OH	Ogden Dunes, IN	103	02/11/2020	02/12/2020	02/12/2020 00:00	02/14/2020 14:23	285	Containers	Nashville, TN 02/14 11:23	03/14 13:47 145 miles	

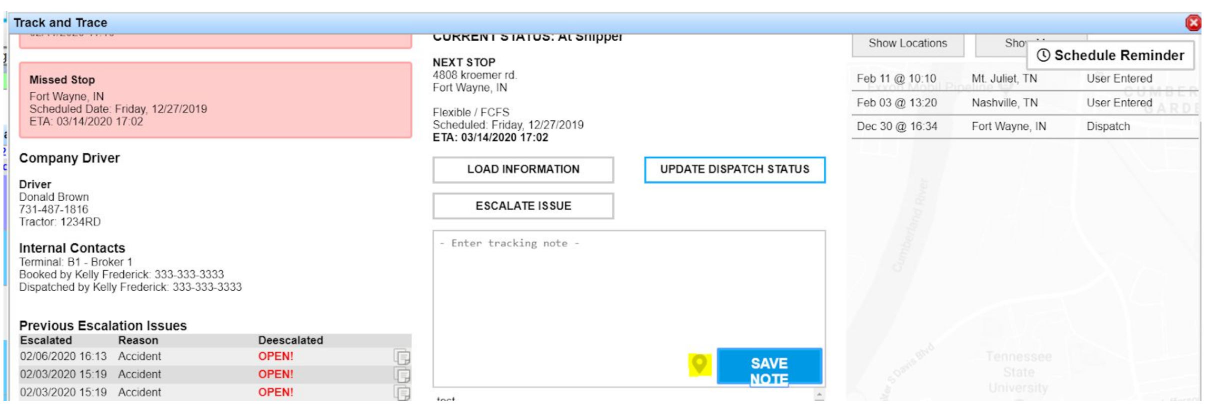
Entering Dates and Times on the Dispatch Record Correctly:

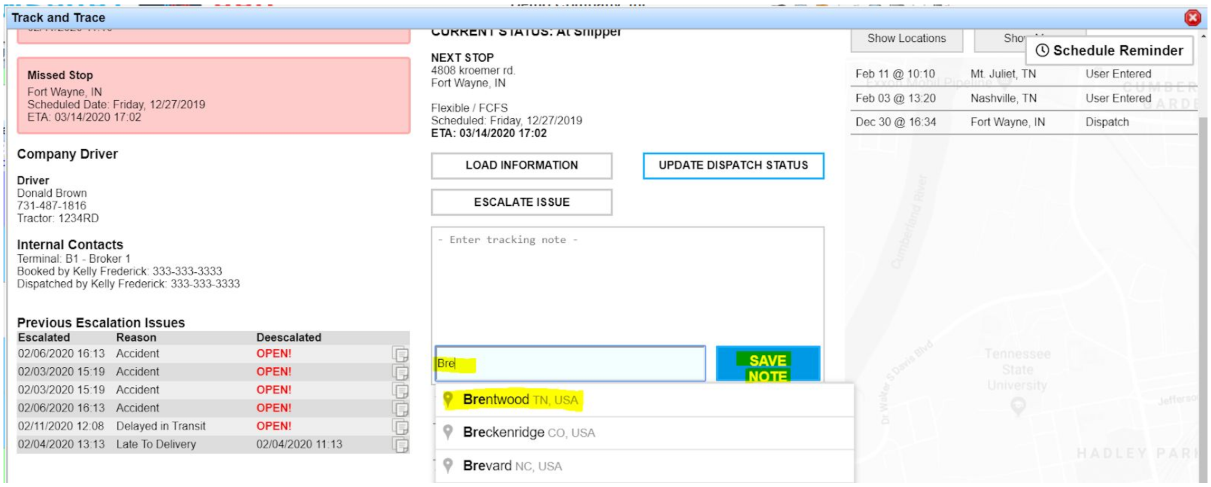
In addition to updating the dispatch status, dispatchers are also responsible for ensuring that the in and out times on the dispatch record are accurate. Users should enter the dates and times on the dispatch record **LOCAL TO THE LOAD**. All loads and dispatches should be entered with the local time to the pick or drop. The check call system works off the timezone for your installation.

Also note that the dates and times entered on the dispatch record should fall within the pickup and delivery date set on the load. Keeping the updates within this window is what keeps the system tracking the load. If you've noticed for some reason that tracking has stopped, it's likely because the in and out times on the dispatch are outside of the dates and times on the load itself.

Sending Location Updates with No ELD or Tracking Services Enabled:

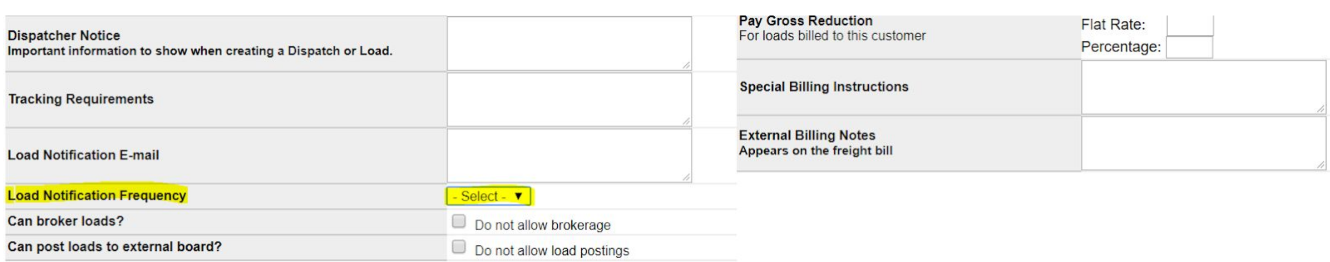
If there is no ELD or other tracking service enabled, you can manually make location updates as needed. This is done from the Track & Trace window. When you open this window, you'll see a gray pinpoint at the bottom of the tracking notes box. Click this pinpoint, and begin typing the location. You'll see that options will begin to pull from Google and you can click on the location to lock it in, or free form type. Once you've entered the correct location, click "Save Note."





Changing the Frequency of Location Updates:

If you do need to change the location update frequency for a customer, you will manage this on their customer record in Transport Pro. Navigate to the customer's record and click to edit the information. Toward the bottom of the first column, you'll see a field titled "Load Notification Frequency." There are several default options in this dropdown list, but if you need others, please alert the technical team.

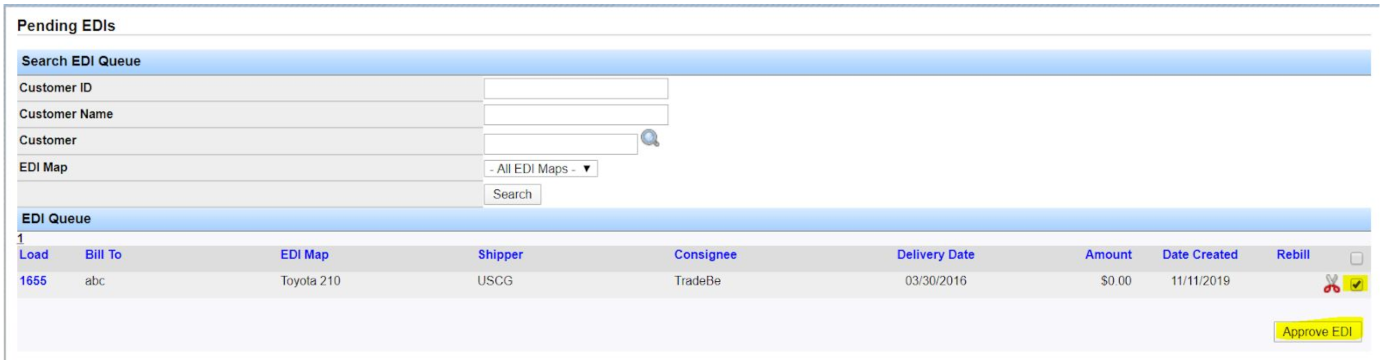


EDI 210 - Billing

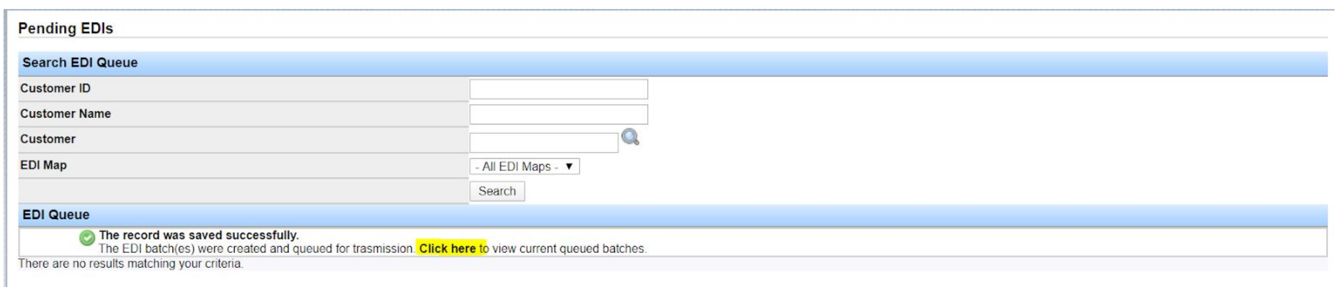
This section will show you how to bill and re-bill loads via EDI. You are essentially going to add one more step to the regular billing process. Note, when our technical team programs the EDI billing map for a customer, this information is set up for you on the customer record. There is nothing you need to add or change on the customer record for EDI.

Bill a load via EDI:
Once you mark a load ready to bill and process the load in the Freight Bill Processing queue just as you normally would, the EDI loads then get sent to the EDI Billing Queue. You will navigate to this queue by going to Billing>Load Queues>Submit EDI>EDI Queue. Here you will see the loads pending review and transmission. Check any/all loads that you want to approve, and then click "Approve EDI."

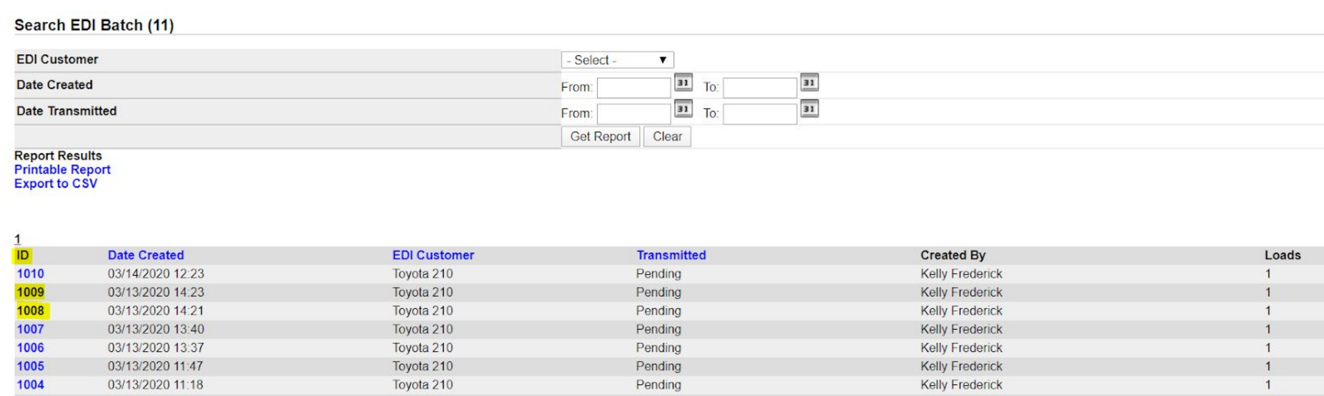
NOTE: This step simply approves it for transmission. You have not actually transmitted the file(s) yet.



Once you click to approve the loads for EDI billing, they get sent to the "Batch Queue." You can navigate to this queue a couple different ways: 1) Once you click to approve the load, you will see a hyperlink pop up, which you can click on to get to the batch queue, or 2) You can follow the path in the menu Billing>Load Queues>Submit EDI>Search EDI Batch.



The next step is to transmit the files. From the batch queue, you will need to click on the file ID.



When you click on this ID you will be redirected to the EDI Transmission Summary screen. To transmit the file click on the "Upload Data File" link. Once you click this, the system will confirm the submission for you. You do **NOT** need to click on the "Confirm Submission" button.

EDI Transmission Summary

EDI Transmission Summary		Loads included in this batch
ID	1010	1655
Date Created	03/14/2020 12:23	
Created By	Kelly Frederick	
Date Transmitted	Pending	
Manage	Upload Data File - Regenerate Data File - Confirm Submission	

EDI Data

{"ediInformation":{"scac":"TTMB","isaSenderId":"TTMB","isaSenderQualifier":"02","isaReceiverId":"031748770","isaReceiverQualifier":"01","isaControlNumber":"14112335","gsSenderCode":"TTMB","gsReceiverCode":"03174

Other Options on the Transmission Summary Screen:
In addition to selecting "Upload Data File" on the transmission summary page, you'll also notice two other options: 1) Regenerate Data File, and 2) Confirm Submission. Here's what each link does:

Regenerate Data File: If for some reason you need to re-submit the file, you can click this link. This will send the file back to the "batch queue" where you can then click on the file ID again, and then re-submit the file.

Confirm Submission: This is only here in the case that you accidentally click the "Regenerate Data File" link. If you didn't mean to click to regenerate the file, then you can simply hit the confirm link and confirm the file was already transmitted.

EDI Transmission Summary

EDI Transmission Summary		Loads included in this batch
ID	1010	1655
Date Created	03/14/2020 12:23	
Created By	Kelly Frederick	
Date Transmitted	Pending	
Manage	Upload Data File - Regenerate Data File - Confirm Submission	

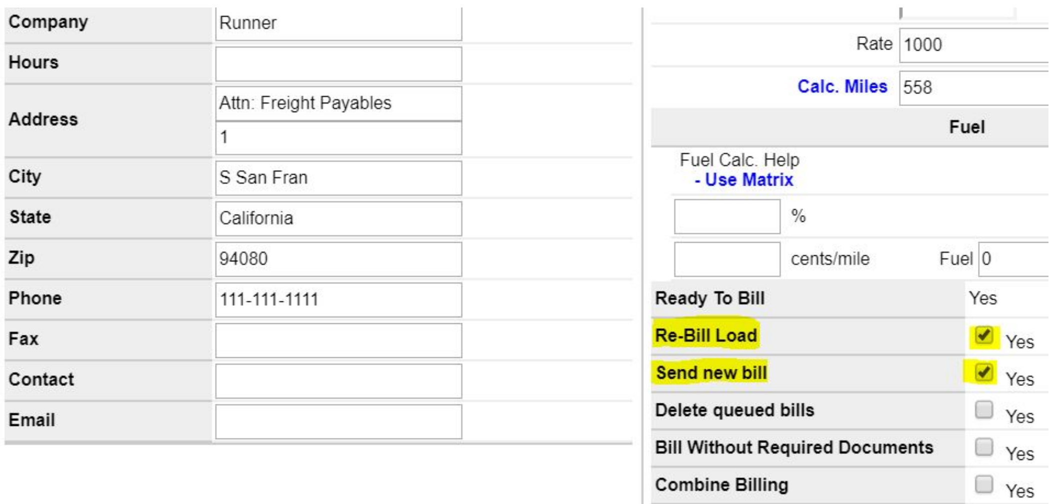
EDI Data

{"ediInformation":{"scac":"TTMB","isaSenderId":"TTMB","isaSenderQualifier":"02","isaReceiverId":"031748770","isaReceiverQualifier":"01","isaControlNumber":"14112335","gsSenderCode":"TTMB","gsReceiverCod

NOTE: When you bill a load via EDI, the information goes over with raw text; there are no images included. If a trading partner tells you that they need the images, or there's anything else special about their billing requirements, please contact our technical team at support@transportpro.net, and they can advise or help you set that up.

Re-Bills:
EDI re-bills are not much different than the normal re-bill process, other than the need to transmit the file again via the EDI billing queue. However, there are a couple things to note.

When you need to rebill a load via EDI, be sure that after you make your changes to the load that you check the “Re-Bill Load” box **AND** the “Send New Bill” box.



This will send the load back to the EDI Queue, where you will approve and transmit the file again, just as you did in the billing process the first time.

NOTE: If a bill is rejected, there are no system notifications in Transport Pro to alert you. Receiving these rejections should be arranged separately with your trading partner. For example, maybe they’d like to send you an email at the end of each day with the list of rejections.

Search Pending and Transmitted Files:
If you need to run a search/report to see what files you have pending for a certain customer, or you'd like to see what you've transmitted within a specific date range, you can do so by following the path in the menu Billing>Load Queues>Submit EDI>Search EDI Batch.

On this screen you have a few different filter options. Any files that have been transmitted successfully will show in the search results with a date and time stamp.

Search EDI Batch (11)

EDI Customer	- Select -
Date Created	From: To:
Date Transmitted	From: To:
	Get Report Clear

Report Results
Printable Report
Export to CSV

1

ID	Date Created	EDI Customer	Transmitted	Created By	Loads
1010	03/14/2020 12:23	Toyota 210	Pending	Kelly Frederick	1
1009	03/13/2020 14:23	Toyota 210	Pending	Kelly Frederick	1
1008	03/13/2020 14:21	Toyota 210	Pending	Kelly Frederick	1
1007	03/13/2020 13:40	Toyota 210	Pending	Kelly Frederick	1
1006	03/13/2020 13:37	Toyota 210	Pending	Kelly Frederick	1
1005	03/13/2020 11:47	Toyota 210	Pending	Kelly Frederick	1
1004	03/13/2020 11:18	Toyota 210	Pending	Kelly Frederick	1
1003	02/13/2020 16:12	Toyota 210	Pending	Kelly Frederick	1
1002	07/14/2019 18:13	Toyota 210	02/13/2020 14:10	Kelly Frederick	1
1001	01/21/2019 20:50	Toyota 210	Pending	System Administrator	1
1000	01/21/2019 20:32	Toyota 210	Pending	System Administrator	1

If you have any questions about EDI in general, or would like to discuss your trading partners' EDI requirements, please contact the technical team at support@transportpro.net.