



SOUTH ATLANTIC CHASSIS POOL (SACP 3.0)

Standard Operating Procedure: Shipment Verification Procedure

Prerequisites

The individual responsible for verifying the customer data should have access to the Shipment Verification Status module in CCMShipments.com. They should also have at least a functional knowledge of uploading shipments to the CCM Shipments portal and which fields are required. If you need more information on partial match verification or uploading to the portal, please contact ChassisChoiceIssues@ccmpool.com with your request.

Timeliness of Process

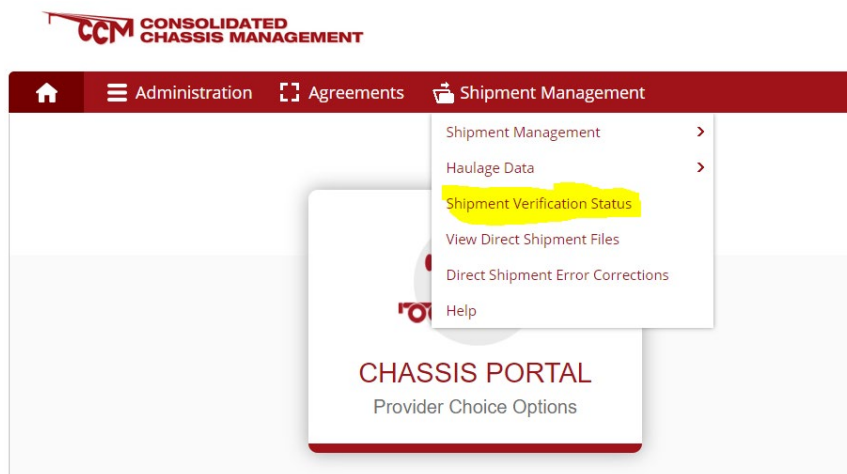
It is essential that this shipment verification procedure is followed every time a file is uploaded for a customer/BCO. This is to ensure that if there is an instance where the data being uploaded is retroactive to a degree (i.e. uploading for moves that have already occurred), there is enough time for the customer to identify the partially matching moves and reach out/re-upload if necessary.

Functional Description

This procedure will cover the steps required to verify all shipment data for BCO customers within the SAC3 pool. When an uploaded shipment full matches to a move in CMS, the chassis user is assigned to the BCO, and the responsible party is assigned to CCM (or CCMF). In order to ensure that usage is assigned accordingly, the customer needs to identify/follow up on discrepancies between the uploaded data and the movement data. The SVS (Shipment Verification Status) functionality in the CCM Shipments portal is used to reconcile this data.

Accessing Shipment Verification

In the CCM Shipments portal, select “Shipment Management” and then “Shipment Verification Status.”





Partial Match Verification

A “Partial Match” is a shipment status assigned by SVS to shipments where there is one or more non-matching fields between the uploaded data and the movement data. SVS takes a full audit of all partially matching CMS movement data, so there can be multiple shipment statuses/move cycles returned for the same uploaded move. It is up to the customer to determine whether the non-matching movement belongs to them; and if so, re-upload the correct matching data within the 10-day lookback window in order for the movement to match and be updated to the BCO.

1. Conduct a search for correctable Partial Matches for the BCO:
 - a. Select your Company.
 - b. Select CCM for the Chassis Provider (When searching SAC3, the chassis provider will always be CCM)
 - c. The Effective Date will auto-populate to 90 days prior to current date.
 - d. Select the *Correctable Moves* check box in the bottom right corner. This will pull back only the correctable partial matches within the 10-day lookback window. It will also auto-select Partial Match and No Match in the Shipment Status field.
 - e. The fields in the third row are customizable based on what you are trying to search, but at least one must be selected/populated. (Multiple reference #s **and** multiple container #s cannot be searched at the same time). To conduct an ‘open search,’ select all ocean carriers and leave Reference + Container blank.
 - i. Ocean Carrier; searching by one or multiple ocean carriers, or click ‘Select All’
 - ii. Reference #; searching by one or multiple reference numbers (separated by comma or enter)
 - iii. Container #; searching by one or multiple container numbers (separated by comma or enter)
 - f. The location fields can be used for narrowing down your search but are not necessary for an open-search.
 - i. Location Level/Location
 1. *Pool* if searching by SAC3, *Service City* if searching by city (Savannah, Atlanta, etc.), and *Location* if searching by individual location (only applicable if moves were originally uploaded by specific location)



2. The results can be exported into an excel document by clicking on the green excel icon in the top-right of the SVS screen next to the *Last Calculate*.

[View Direct Shipments](#) Last Calculate: 08/23/2023 09:56



3. Within the excel file, filter to all partial matches. Based on the results, the partial matches can be verified according to the Fields with No Match column. It is possible for more than one field to not match the movement data.

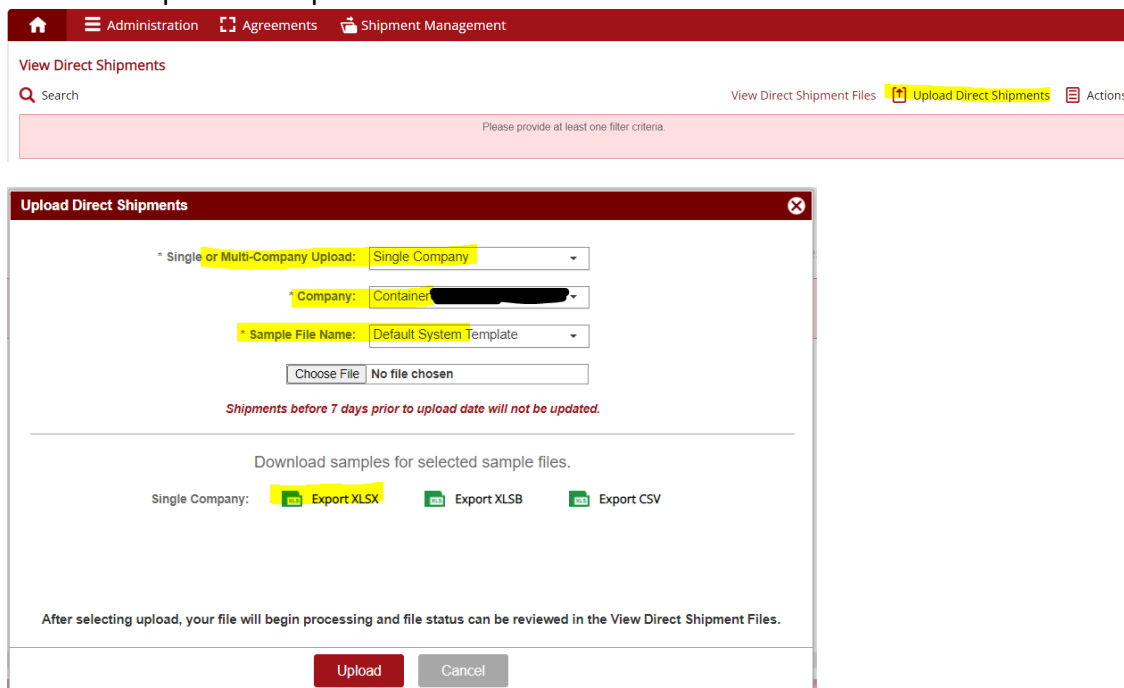
Code	Description	Resolution(s)
[BCO],[Contr]	Reference# was uploaded and matched to 1 or more containers, but also matched with other container(s) that were not reported	Reload the matching reference# with any additional containers that you wish to receive usage for
[BCO],[UU]	Shipment was uploaded with an incorrect ocean carrier	Reload the shipment with the correct ocean carrier
[Location],[BCO]	Shipment was uploaded with a location/pool that does not match where it actually moved	Reload the shipment with the correct location
[Location],[BCO],[RP]	Shipment was uploaded for SAC3 and moved in a different pool, or vice versa	Reload the shipment with the correct location
[BCO],[Ref]	Reference # does not match to the booking/BL on the shipment	BCO uploaded the import and is partial matching to the export, or vice versa. If usage is not wanted for the opposite leg of the cycle, no action is needed OR Reload the shipment with the correct reference#
[Ref],[BCO],[UU]	Reference# and expected ocean carrier does not match to the shipment For example: Reference: HLCUGOA12345678 Ocean Carrier: CMA CGM SA C/O CMA CGM (AMERICA) LLC	Reload shipment with the correct Reference# and/or Ocean Carrier

Correcting/Re-uploading Data

If one or more partially matching records are determined to be shipments the customer is expecting usage for, the corrected data for those shipments must be re-uploaded to the CCM Shipments portal. If only one shipment needs to be re-added, there is also a single-add function instead.

1. Exception File Upload:
 - a. Follow the path highlighted below to the *Upload Direct Shipments* screen and fill out the required fields.
 - b. Note that some companies have an upload template set up for them, but most companies just use the default. To ensure you are uploading in the correct format, we recommend choosing a template and then exporting the sample file template.
 - c. The fields with Red headers are the required fields, although it is recommended that container also be included. For SAC3, 'CCMF' will always be the correct chassis provider SCAC.
 - d. Once the file is uploaded, ensure that all exceptions were processed and inserted in the *View Direct Shipment Files* Screen.
2. Single Add New:
 - a. Follow the path highlighted below to the *Add New* screen and fill in the required fields. Provider will always be 'CCMF', Pool can be left as 'All' or updated to just 'SAC3'.

1. Exception File Upload:



The screenshot shows the CCM Shipments portal interface. At the top, there is a navigation bar with links for Administration, Agreements, and Shipment Management. Below this, the 'View Direct Shipments' section is visible, featuring a search bar and a list of actions: View Direct Shipment Files, Upload Direct Shipments (highlighted), and Actions. A message below the search bar states: 'Please provide at least one filter criteria.'

The 'Upload Direct Shipments' modal form is displayed, containing the following fields and options:

- * Single or Multi-Company Upload: Single Company (dropdown)
- * Company: Container (dropdown)
- * Sample File Name: Default System Template (dropdown)
- Choose File: No file chosen (button)

A red warning message states: 'Shipments before 7 days prior to upload date will not be updated.'

Below the form, there is a section for downloading sample files for selected sample files. It includes a 'Single Company:' label and three buttons: Export XLSX (highlighted), Export XLSB, and Export CSV.

At the bottom of the modal, a message states: 'After selecting upload, your file will begin processing and file status can be reviewed in the View Direct Shipment Files.'

The modal has two buttons at the bottom: Upload (highlighted) and Cancel.



2. Single Add New:

Home Administration Agreements Shipment Management

View Direct Shipments

Search View Direct Shipment Files Upload Direct Shipments Actions

Please provide at least one filter criteria.

Add New

Home Administration Agreements Shipment Management

Add Direct Shipment

Direct Shipment Info

* Direct Shipment Type: Chassis Customer * Company:

* Chassis Provider SCAC: CCMF * Ocean Carrier SCAC:

* Chassis Provider: CCM * Ocean Carrier:

Effective Date: Expiration Date:

☐ Perpetual Flag Expected # of Containers:

* Reference #: Container #:

* Pool: All- ☐ Multiple Pools

* Location Level: Entire Pool

Shipments before 7 days prior to upload date will not be updated.

Save Reset Cancel

Final Note: The matching process runs overnight so the corrected shipments you upload will still show as partial matches until the following day. We recommend checking the corrected moves the next day to ensure they were loaded correctly.