Third Party Billing

Training Material

3PB Desk Process

#### Third Party Billing – 3PB Desk Process

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| Introduction | **The Third Party Billing Department** addresses specific billing practices for 3rd party billings to the USA. |

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| Purpose | The purpose of this document is to explain how to:   * Print Emails/Open Mail * Log Shipments * Pass documents to the Research Department |

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| Required Documents | The 3PB Desk requires the following documents to be sent for processing   * One (1) overseas invoice which includes all authorized origin and destination charges * House Airway Bill (HAWB) or House Bill of Lading (HBL) * Commercial Invoice or Customs Clearance Documents * Authorization for third party billing (if required per shipment) – often times in email form – from the District Manager (DM) of the U.S. Controlling Station. * Special documentation required per customer Standard Operational Procedures (SOP) for example POD, SLI) |

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| Workflow |  |

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| Documents received via email | This step in the process is triggered by the arrival of documents via email. |

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| Tools Needed | * MS Outlook * Dedicated Printer * LOGIS Air |

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| Printing Emails | The below steps detail how to print documents that are received in the 3PB inbox (US.3PB@dhl.com). |

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| Step | Action |
| 1 | Open Microsoft Outlook |
| 2 | Once all folders have been updated, arrange by received date and select the oldest item. |
| 3 | Now sort the emails by *Subject*. |
| 4 | **Open** the email. Are documents attached to the email?   |  |  | | --- | --- | | If… | Then… | | Yes | * Verify that they are shipping documents (this will become obvious with time). * Check if there are more than one shipment’s docs attached. * **Print** all documents attached (including the email that was sent). Most can be printed by **Right-click, Print** (Adobe/.PDF files and .tif documents); however, some need to be opened to print (Excel spreadsheets, ZIP files/folders, JPEG images, etc.). | | No | Review the email to see if any docs are attached later in the email trail. Are documents embedded within the email?   |  |  | | --- | --- | | If… | Then… | | * Yes | * See above Yes procedures | | * No | * Slot it as No Attachments | |   **Note:** Create Folders within outlook for each country that you receive documents from. When you have finished working emails, SLOT them (move them) to the receiving country folder. |
| 5 | Repeat Steps 1-5 until all documents have been printed. |
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Third Party Billing – 3PB Desk Process, *Continued*

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| Printing Emails (continued) |

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| Step | Action |
| 6 | * Confirm that what printed matches the documents that were sent via email. (This may require you to count the pages of the documents as well as match up the printed copies with the on screen copies of the documents)   **Note 1**: Refer back to the required documents needed prior to moving to the next step.  **Note 2**: If the House Airway Bill is missing and it is required, please go to **page 11** to learn how to print a House Airway Bill from LOGIS Air.  **Note 3**: If the House Airway Bill is present but the terms show “as agreed” instead of the dollar amount, you must reprint the House Airway Bill in LOGIS Air. Please refer to **Page 12** for steps on how to do this.  **Note 4**: If only a Masterbill and not a House Airway bill is present, check the exception list to see if the customer is listed. If they are not, go to LOGIS Air and print a copy of the House Airway bill. |
| 7 | Put each set of documents (which are separated by shipment) into the following order and staple together.   * Invoice – if applicable (sometimes you may not receive one) * House Airway Bill or House Bill of Lading * Commercial Invoice * Packing List * Miscellaneous Documents * Emails |
| 8 | Forward all emails that have been printed to the research department. When you forward, add the HAWB number to the beginning of the subject line.  **Note**: Forwarding emails is only necessary if the research department does not have access to the 3PB inbox. |
| 9 | Once all documents have been printed, collated, and the emails have been forwarded to the research department, set the documents aside. |

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| Documents received via traditional mail | This step in the process is triggered by the arrival of documents via traditional mail. |

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| Tools Needed | * Letter opener |

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| Traditional Mail | The below steps detail how to handle documents that are received via traditional mail. | | | |
| Step | Action |
| 1 | **Open** mail. |
| 2 | Put each set of documents (which are separated by shipment) into the following order and staple together.   * Invoice – if applicable (sometimes you may not receive one) * House Airway Bill or House Bill of Lading * Commercial Invoice * Packing List * Miscellaneous Documents * Emails |
| 3 | Repeat Step 1 and 2 until all mail has been opened. |
| 4 | Once all mail has been opened, sorted and collated, combine with the printed emails for logging. |
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Third Party Billing – 3BP Desk Process, *Continued*

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| |  |  | | --- | --- | | 3PB Database | The Database is a record keeping tool which contains a list of all the documents received. |      |  |  | | --- | --- | | Tools Needed | * MS Excel * Printed Documentation from emails * Hard Copy documentation via traditional mail |      |  |  | | --- | --- | | Logging Documents into Database | The below steps detail how to properly log a shipment into the 3PB Database. | |

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| Step | Action |
| 1 | From your desktop Click My Computer |
| 2 | Under Network Drives, Click DB 3PB |
| 3 | Locate the excel spreadsheet entitled 3PB Database and click it to open the spreadsheet.  **Note**: In the upper left corner of the spreadsheet you will see the name of the document. Next to the name you should see the word SHARING in parenthesis. If you do not, close the spreadsheet and reopen it. Do not work on the spreadsheet if the word sharing is not visible as part of the spreadsheets name. |
| 4 | Key the following fields  **Note**: Prior to keying each new entry hit Ctrl +F and type in the HAWB number or Invoice number to search for duplicates. If it doesn’t exist, key the following information in the appropriate column. If a Duplicate is found, check in Column O for who keyed the entry and then pass the paperwork to that person.   |  |  | | --- | --- | | Column | Data Entered | |  | Must always be the date that the documents are being logged. | |  | Type in the date that the printed emails were received in the [US.3PB@dhl.com](mailto:US.3PB@dhl.com) inbox or the date that the traditional mail was received. | |

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| Logging Documents into Database (continued) |

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| Step | Action |
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| Logging Documents into Database (continued) |

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| Step | Action |
| 4 (continued) | |  |  | | --- | --- | | Column | Data Entered | |  | **For Air Shipments**: Type in the weight in kilos without the decimal.  **For Ocean shipments**: Type in the weight in kilos without the decimal | |  | Type in the Consignee’s name. It must be typed in ALL CAPITAL LETTERS. There is a maximum of 25 characters allowed, including spaces. | |  | Type in the Origin code that is located on the HAWB or the Ocean Bill of Lading. | |  | Type in the Destination code that is located on the HAWB or the Ocean Bill of Lading. | |  | For documents that are being keyed for the 1st time and have multiple invoices, key in any additional invoice numbers in this field | |  | Type “received by US Mail” and the date received of only the traditional Mail documents. | |

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| Logging Documents into Database (continued) |

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| Step | Action |
| 4(continued) | |  |  | | --- | --- | | Column | Data Entered | |  | If a Date is present in the DE Date Field, give the packet to the Data Entry group.  If a date is present in the Z column, give the packet to the Macro group.  If a date is present in the AA Column, give the packet to the research group. Note on the packet that this is an additional billing. Place the invoice number in column AB. Type in the received date in column AD.  If a date does not appear in Column Y, Z, or AA, give the packet to the research group. | |
| 5 | After keying 10 entries, save the document. |

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Third Party Billing – 3BP Desk Process, *Continued*

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| Transferring documents to research department | Once all documents have been properly logged into the 3PB database it is now safe to hand over all documents to the research department. |

End of 3PB Process

Third Party Billing – 3BP Desk Process, *Continued*

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| |  |  | | --- | --- | | Printing a Housebill for LOGIS Air | If a House Airway Bill is required but not received, you may need to print out a copy from LOGIS Air. |      |  |  | | --- | --- | | Tools Needed | * Sign on to LOGIS Air * Dedicated LOGIS Air printer * House Airway Bill paper |      |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | | Printing a Housebill | The below steps details how to print a House Airway bill in LOGIS Air.   |  |  | | --- | --- | | Step | * Action | | * 1 | * Click the LOGIS Air Icon on your Desktop. A LOGIS Air session will open. | | 2 | In the Type your choice and press Enter, Type LD. | | 3 | Press Enter | | 4 | Type in the LOGIS Air User ID | | 5 | Hit Tab to tab to the Password field | | 6 | Type your Password | | 7 | Press Enter | | |

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| Printing a Housebill | The below steps details how to print a House Airway bill in LOGIS Air.   |  |  | | --- | --- | | Step | Action | | 8 | At Next Function Type PHB | | 9 | Press Enter | | 10 | In the Specific HB# Field Type the Housebill Number | | 11 | Tab to Prt-Dst: and Prt# and Type in the Printer Destination. (Example: PIA5) | | 12 | Press Enter | |