

# MT Direct Rapid Bill of Lading (RBOL)

v3.0

September 29, 2020

# **Table of Contents**

Table of Contents	2
Introduction	3
Features	3
Starting a New Bill of Lading	4
Step 1 - Start General	<b>4</b> 4
Step 2 - Addresses  General  Location Pick List	<b>6</b> 6 7
Step 3 - Freight Details  General  Dangerous Goods  Basic Information  Freight Class  Weight and Dimensions	8 8 9 10 10
Step 4 - Optional Information General Accessorials Section Miscellaneous Section	<b>11</b> 11 11 12
Finalizing a Bill of Lading	12
Finalized Bill of Lading Screen	13
Customizing Shipping Labels	13
Saved Templates	16
List/Edit BOL Screen  General  My Personal Templates and Our Company Templates  Our Company Finalized	<b>16</b> 16 17 17
Release Notes	18

## Introduction

The Rapid Bill of Lading allows you to create a quick and easy bill of ladings or shipping labels with all your information provided with a click of a button. The Rapid Bill of Lading helps you complete, view, edit or delete BOLs automatically and provides you with a list of all your shipments with Manitoulin Transport.

Why Use the Rapid Bill of Lading?

Because it is fast and easy!

The Rapid Bill of Lading is an invaluable shipping and inventory management tool. There is *no more guessing* if your information has been entered correctly and we even provide some features to *help speed things up*!

# **Features**

- Bilingual Choose to have the Rapid Bill of Lading available to you in French or English.
- **Custom customer database** Store your customers' shipping information and simply pick them as the Shipper, Consignee, or Third Party Billing To. Your selection will automatically populate the Bill of Lading form with their name, address and contact info.
- Historical Data View your finalized BOLs and delete them at your convenience.
- Personal and Company Templates Have your Bill of Ladings stored for quick and easy future use.
- **Context-Sensitive Help** The Rapid Bill of Lading will help you fill out the necessary fields to create a form by warning you if you have missed any important information.
- Shipping Labels Create shipping labels to place on your freight with the click of a button.

# Starting a New Bill of Lading

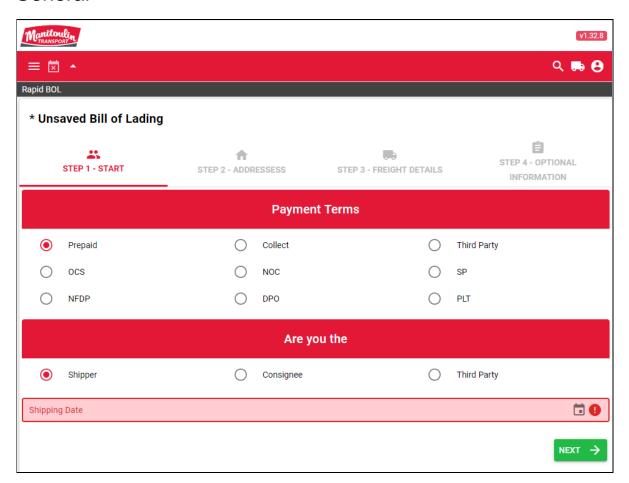
From the top menu select **Shipping Wizard**.

On the side menu, under Rapid BOL, select Create BOL.



# Step 1 - Start

## General



- 1. Select the **Payment Terms**.
- 2. Select if you are the **Shipper**, **Consignee** or **Third Party**.
- 3. When you are ready, click Next or the "Step 2 Addresses" tab

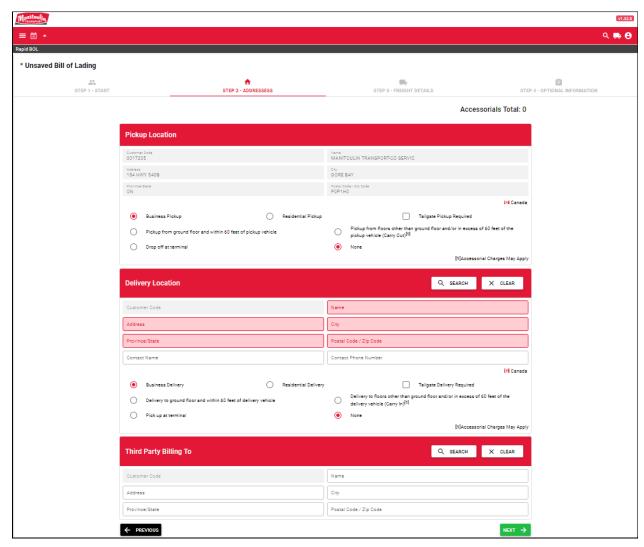
If you are creating a Bill of Lading from a different starting point on MT Direct, most of the following fields may already be completed and you may click Next.

You may move between steps at any time by clicking the tabs at the top of the form.

Pressing your browser's Back or Forward buttons will not move you between steps. Simply use the tabs at the top or the Previous or Next buttons at the bottom.

# Step 2 - Addresses

## General



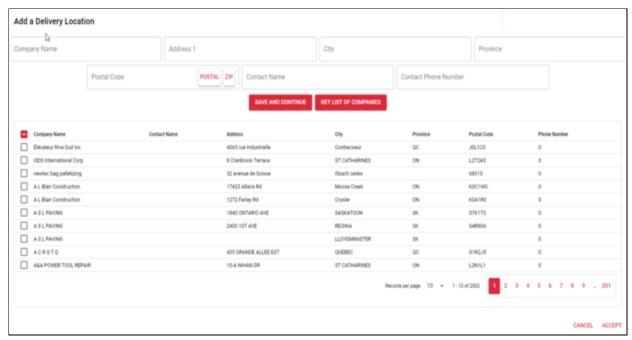
Your location, according to your selection of Shipper, Consignee, or Third Party, will be automatically filled in.

For each of the remaining locations (Pickup or Delivery, and optionally Third Party Billing To),

type the details into the appropriate fields, or to save time, click the pick list button ( ) to select from a list of companies or to add a new company to the list (See Location Pick List section below).

Enter any extra details about the Pickup Location or Delivery Location by using the radio buttons.

## **Location Pick List**



Clicking on a company from your list of companies will return you to Step 2 with the location's required fields filled in.

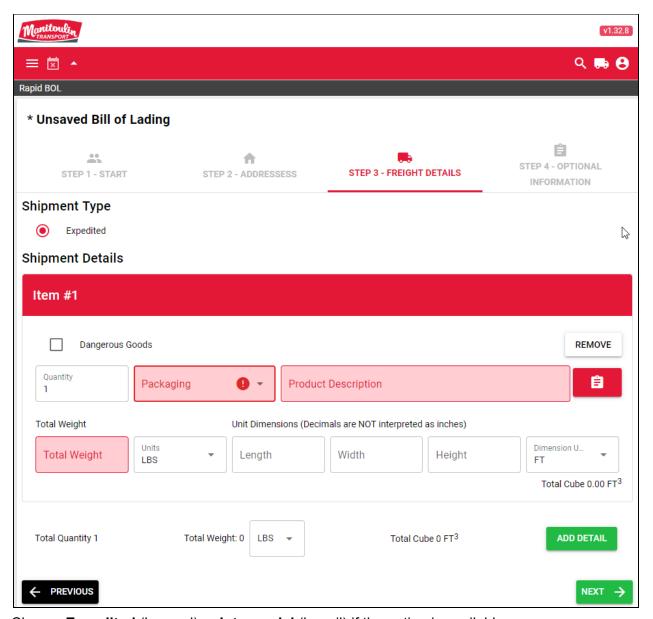
To update your list of companies based on your company's recently used locations, click **Get List of Companies**.

To use a new location and add it to your list of companies, enter the location information in the appropriate fields and click **Save and Continue**.

When adding a new company, click the Postal/Zip code link. It will allow you to look up postal or zip codes.

# Step 3 - Freight Details

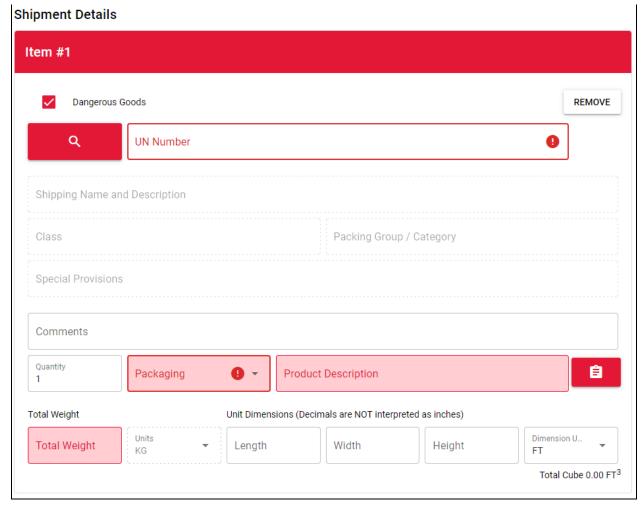
## General



Choose **Expedited** (by road) or **Intermodal** (by rail) if the option is available.

You will then be required to provide information for each Detail. To add another Detail, click the **Add Detail** button in the bottom-right corner. To remove a Detail, click the corresponding **Remove** button on the right-hand side.

# **Dangerous Goods**



For Details that are Dangerous Goods, be sure to check **Dangerous Goods**.

Enter the **UN Number** or if you are unsure of that, click the search button ( ) to filter and select from a grid of valid options.

If there are multiple options for **Shipping Name** and **Description**, select the appropriate option from the pull-down menu.

If there are multiple options for the **Packing Group / Category**, select the appropriate option from the pull-down menu.

Provide any other relevant information under **Comments**.

Below the list of Details, enter the **24 Hour Contact Name** and **24 Hour Phone Number**, and optionally, the **ERAP Plan Number** and **ERAP Phone Number**.

## **Basic Information**

For each Detail, enter the Quantity, Packaging, and Product Description.

To select the Product Description from your list of saved product descriptions, click the pick list

button (

## **Freight Class**

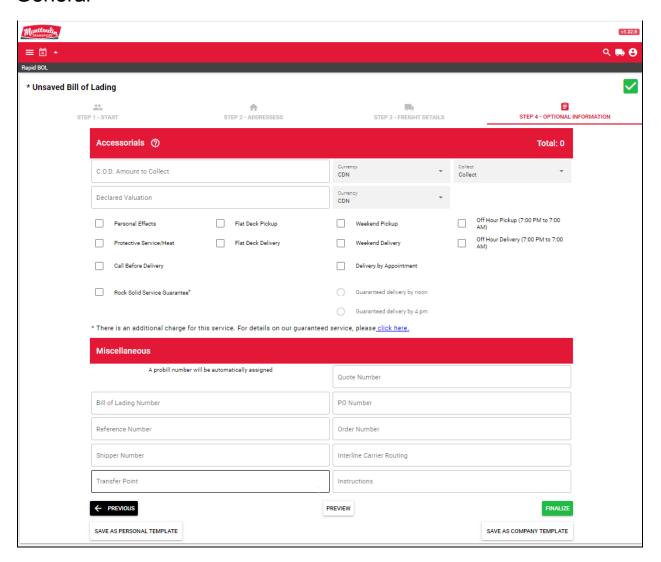
For international shipments only, you will be required to select the **Class** for each Detail. Use the Class pull-down menu to select a class.

# Weight and Dimensions

For each Detail, enter the **Total Weight**, including units (kg or lbs), and if possible, the **Unit Dimensions** including units (ft, in, or cm).

# Step 4 - Optional Information

## General



## **Accessorials Section**

Choose up to 4 (four) extra shipping requirements needed for your freight. The total number of Accessorials you have selected will be displayed in the top-right corner.

For details of these services, see Tariff Item 100 - Rules and Regulations section of the MT Direct Manual, or click the question mark icon ( ).

## Miscellaneous Section

You can add any additional information you require in this section. The information you provide will appear on the printed Bill of Lading.

# Finalizing a Bill of Lading

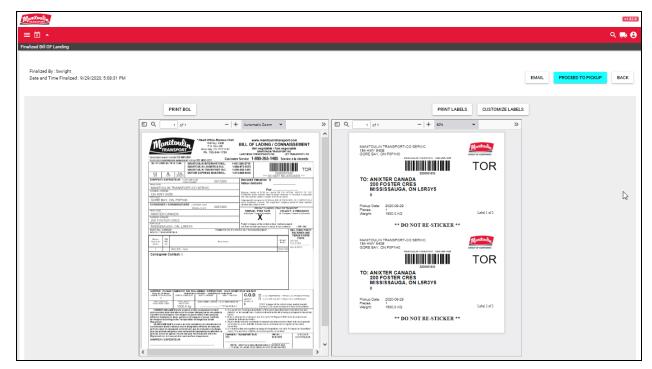
The green box with a check mark ( ) in the top right corner will indicate that you have filled in all required fields.

You can now **Preview** your BOL, and when ready **Finalize** it. You *must* finalize your BOL before you can print it.



Defore finalizing, you may optionally save your BOL as a template (See Saved Templates section below).

# Finalized Bill of Lading Screen



After finalizing a BOL, you will be brought to the **Finalized Bill of Lading** screen where you can view, save, print, and or email the BOL and shipping labels.

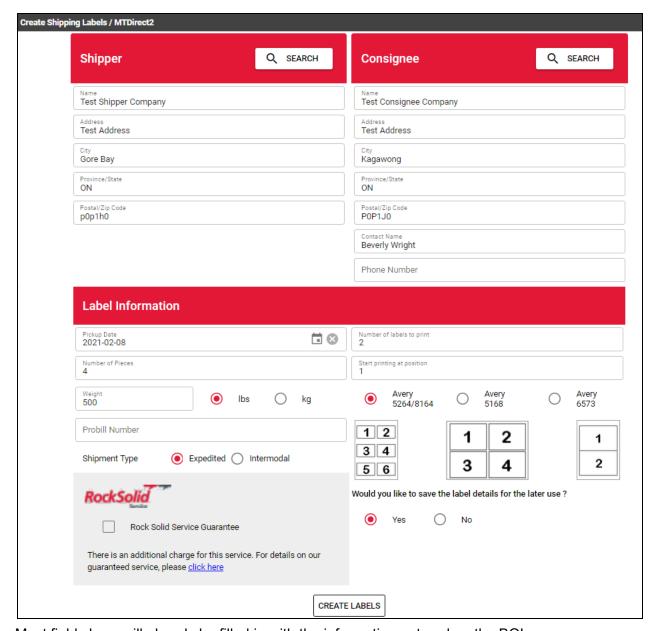
To open a PDF version of the BOL, which you can save or print, click **Print BOL**.

To open a PDF version of the labels, which you can save or print, click **Print Labels**.

To have both of these PDFs emailed to someone, click **Email**, enter the email address of the recipient, and click **Ok** or press enter.

# **Customizing Shipping Labels**

To customize the shipping labels, click **Customize Labels** on the **Finalized Bill of Lading** screen, and you will be brought to the **Create Shipping Labels** screen.



Most fields here will already be filled in with the information entered on the BOL.

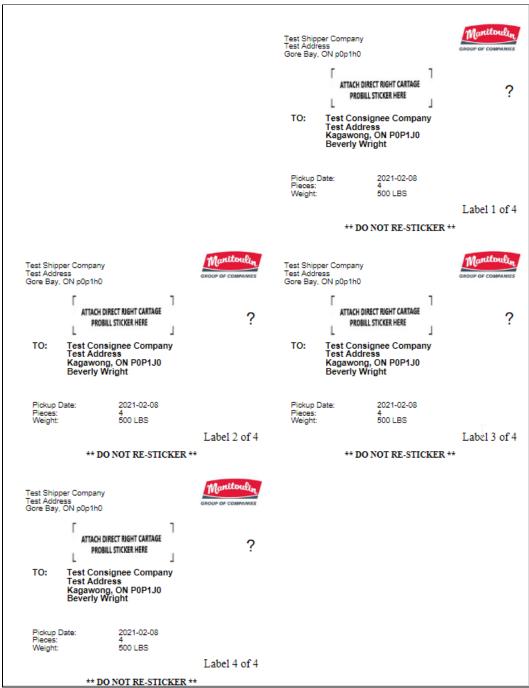
Choose which type of label format you would like to print by selecting the associated radio button.

Select how many labels you would like to print and from what starting point.

If you would like to save this label's details for future use, simply click Yes.

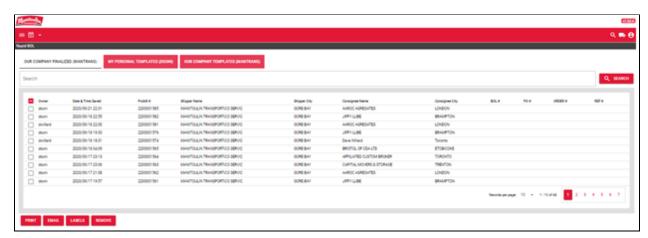
Click **Create Labels** and you will be brought to a PDF version of your labels, which you can save or print.

In the example below, four labels were chosen to print starting in the second position.



You can also create labels using the **Create Shipping Labels** link from the Shipping Wizard side menu.

# **Saved Templates**



When editing a BOL, you can **Save As Personal Template** or **Save As Company Template** to save it as a new template.

- A Personal Template is visible only to you.
- A Company Template is visible to all users in your company, but can only be updated or deleted by the user who saved it.

When editing a saved template, you can **Save Changes** to update the saved template.

For instructions on using and managing your saved templates, see the **List/Edit BOL** section below.

# List/Edit BOL Screen

## General

On the side menu, under Rapid BOL, select List/Edit BOL.





## My Personal Templates and Our Company Templates

To edit and use a saved template, simply click that row in the grid.

To preview a saved template, check the checkbox on the left of that row and click **Preview**.

To delete saved templates, check the checkbox on the left of each row and click **Delete**.

# Our Company Finalized

By default, BOLs finalized "This month" will be displayed. To change the date range, click **Show/Hide Search**, select a pre-set from the pull-down menu or select specific dates, and click **Search**.

To go to the Finalized Bill of Lading screen for a BOL finalized by your company, where you can view, save, print, and or email the BOL and shipping labels, simply click that row in the grid. (See **Finalized Bill of Lading Screen** section above).

To print finalized BOLs, check the checkbox on the left of each row and click **Print**.

To email finalized BOLs with shipping labels, check the checkbox on the left of each row, click **Email**, enter the email address of the recipient, and click **Ok** or press **enter**.

To customize labels for a finalized BOL, check the checkbox to the left of that row and click **Labels**.

To remove finalized BOLs from the list, check the checkbox on the left of each row and click **Remove**.

## Release Notes

#### v3.0

Developed for MT Direct 2.0

#### v2.7

- Enhanced logic for when Rock Solid Service Guarantee is available
- Changed max length of Detail Description fields from 70 to 210
- Enhancements to the Dangerous Goods section of Details
  - Added Search for UN Number, Shipping Name and Description, and Packing Group / Category
  - Added UN Number validation
  - Added pull-down menu with valid options for Shipping Name and Description, based on UN Number
  - Changed Class to be determined automatically, based on UN Number
  - o Added pull-down menu with valid options for Packing Group / Category

#### v2.6

- Added Sent By and Probill # to emails
- Changed to not let user edit location details (Name, Address, City, Province, Postal Code) for any location that has an Account Code
- Changed to not generate Probill Number if Pickup Location is not a Direct Point
- Enhanced validation on detail weights and dimensions
- Added date range filter to Our Company Finalized grid
- Added confirmation screen when creating similar BOL on the same day by the same customer
- Added warning for international shipments

#### v2.5

- Changed to automatically assign a Probill number on finalization
- Changed to automatically provide shipping labels on finalization
- Added Shipment Type and Rock Solid Service Guarantee options to Shipping Labels
- Changed to disallow 3-character postal codes

#### v2.4

- Added note to clarify the format to enter dimensions in
- Rebranded as Rapid BOLSeparated Business vs Residential and Tailgate options
- Enhanced Delivery by Appointment fields
  - Added Date field
  - Split Time into two fields to allow a larger variety of ranges or a single point in time

- Added read-only Summary field
- Changed BOL#, PO#, Reference# and Shipper# to accept multiple comma-delimited numbers
- Made options visible but disabled when not allowed
- Text changes

#### v2.3

- Added Finalize function
- Added Preview function
- Added option for Rock Solid Service Guarantee
- Enhancement to Packaging dropdown
  - Added "Mine" category for previously used selections
  - Added scroll-bar
  - Added "No Match" message
- Repositioned and enlarged Quote #, Pickup #, and Tracking # on PDF
- Text changes
- Changed style of disabled buttons to make the disabled state more obvious

#### v2.2

- Fixed issue transitioning from Online Pickup
- Added shared Company Templates

#### v2.1

- Added Combo-box input component for Packaging field
- Changed to display Packaging in full text on generated PDF, rather than the two-letter code
- Added option to select Product Descriptions from presets
- Added Shipping Name field for Dangerous Goods details
- Added 24-hour Contact Name for Dangerous Goods shipments
- Added Quote Number field
- Added Hover Helps
- Added "Save As" function
- Added "You have unsaved changes. Are you sure you would like to leave?" warning
- Enhanced validation
  - Declared Value and COD Value cannot be zero
  - Probill Number cannot be already in use
- Enhanced text layout on PDF

#### v2.0

Major revision