Logistics Gateway Training
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Introduction

The Logistics Gateway (carrier portal) provides carrier users access point into TLM and allows carriers to respond to and process shipments that are tendered or offered to them. The portal allows carriers to accept/decline shipments and create tracking messages for shipments to update their current state in the shipment lifecycle. Carriers can also respond to capacity finder (auction) web offers, create appointments, create invoices and view claims.

Objective

- Respond to tenders in the Logistics Gateway
- Enter shipment tracking messages in the Logistics Gateway
- Viewing Shipments in Archive List
- Configure alert subscriptions

URL Link to HEB’s TMS

URL ---- [https://tms.heb.com](https://tms.heb.com)
1 Logging into the Logistics Gateway and Navigate to the Webtop Screen

1.1 How to login to the Logistics Gateway

1. Logging into the Logistics Gateway, we have added a “Forgot Username?” and “Forgot Password?” links. If you do not remember your login information.

1.2 Navigating the new Webtop screen

1. New Webtop screen
2. Make sure that you are in the “Transportation Execution Portal” if you are not seeing this following screen. You will need to click on the drop box just

3. Click on the Menu button

4. Click on the “Show All” button
5. Now you are on the Main Menu
1.3 How to create a Tile on your Webtop (Short Cut)

1. Once you are on the Menu screen, you can right click on any item that you want to add to your Webtop screen. And select “Pin as Tile”, next click on the Home button to get to the Webtop screen.
1.4 Webtop Icon List

1. List of Icons

A. MENU
B. SOLUTION SELECTOR
C. TILE (SHORTCUTS)
D. HOME
E. HELP
F. WINDOWS
G. WORKSPACES
H. USER PREFERENCES
1.5 How to Add an item to the Quick menu.

1. Once you are on the Menu screen, you can right click on any item that you want to add to your Webtop screen. And select “Add to Quick Menu”

2. Next you will need to select a tab from the dropdown box.
3. Next you will need to select an item from the dropdown box.

4. Now click on the “Quick Menu” button.
5. Click on the “Logistics Gateway” tab and will see your item you added.
2 Accept or Reject Web Tenders

Through the Logistics Gateway, carriers can see shipments that have been tendered to them on the Web Tenders list. (Logistics Gateway is also known as Carrier portal or Freight Selector).

Carriers can either accept, decline, or choose to do nothing with shipments that are tendered to them.

- If a carrier **does not respond** to a tender within a configurable time, the tender is automatically recalled from the carrier after that amount of time. (This time limit can be determined by H-E-B)
- If the carrier **accepts** the tender, the shipment’s status gets updated to ‘Booked/Active’ and the response status goes to “Accept”.
- If the carrier **declines** the tender offer, the shipment’s status gets updated to ‘Recalled’ and the response goes to “Reject”.

3.1 How to respond to a web tender in the Logistics Gateway: Method 1

1. In the Logistics Gateway navigate to Menu → Web Tenders
2. Populate the checkbox next to the appropriate shipment

   a. Validate that all shipments are accepted on the carrier’s behalf

   ![Web Tenders screenshot]

   b. Or click on the Actions menu option to accept or reject the Tender

   ![Actions menu screenshot]

   c. The page will refresh, and the Tender Status will update to reflect the acceptance or rejection

   ![Updated Web Tenders screenshot]
3.2 How to respond to a web tender in the Logistics Gateway: Method 2

1. A second way to accept a web tender is for the carrier to first access the details for the shipment by clicking on the Shipment ID.

2. The Shipment Details screen will load showing detailed stop and order information for the shipment. At the bottom of the screen in the Web Tender Response section, the carrier can Accept or Decline the tender.
(Tip: The carrier user can also use the right click of the mouse to view the Accept or Decline buttons.)
3.3 How to filter for a shipment in Web Tenders page: Method 1

1. If the carriers have multiple shippers with whom they are doing business with, the carriers can choose the Shipper drop down to filter out the shipments from H-E-B and hit Apply button.

2. The carrier users also have an option to select the shipments in a status.
   - For example, if the carrier’s user wants to see only the shipments that are newly tendered to the carrier by H-E-B, they may select the New Request option under “Tender Status Carrier Reply” column.

3.4 How to filter for a shipment in Web Tenders page: Method 2

1. In the Logistics Gateway navigate to Menu → Web Tenders. Click on the Filter List
2. Click on New Filter link, this opens the Add filter screen

![Filter List](image1)

3. This screen shows all the fields that are available to filter the Web Tenders. One of the options is to enter the Shipment ID if you are looking for a specific shipment id.

![Add Filter](image2)
4 Web Offers

Web offers fall into two categories:

1. **Contract** (shipment offered only at previously contracted rate)

2. **Dynamic** (carriers respond to offer with a spot rate for transporting the load)

As with web tenders, you have a limited time to respond to web offers (typically 1 hour). Accepting a web offer at either a contract or spot rate does not guarantee that the shipment will be tendered to your company. If HEB chooses your offer, a separate, corresponding tender will be sent to you after the web offer has closed. Users can view and respond to these offers through the Web Offer List in TMS. An example of the Web Offers list is shown below. After accepting, the offer will be shown on the Web Offer list with a carrier reply status of Accept.

After the end of the web offer cycle HEB will evaluate all carrier’s responses and decide which carrier will be offered the tender. Only the chosen carrier will receive a tender offer for the shipment. This tender offer will be viewable on the Web Tenders list with the rate identified in the previous web offer.

**IMPORTANT:** Take care not to confuse a Web Offer with a Web Tender. A Web Offer is only a request to provide HEB with a rate to transport a particular shipment. Carriers should only execute pickups for loads with an accepted tender.
4.1 **Web Offers-(Contract and Spot rates)**

Select Web Offers under Menu

On the Web Offers page, Accept or Decline an offer. Check the box on the shipment ID you want and click Accept.
4.1.1 Web Offer for Contract Rates
Make sure that you select the correct currency type (USD) and click Accept

4.1.2 Web Offer for Spot Market Rates
Select the Spot Rate from the drop-down box under SHIPMENT Total Cost. Key in your Linehaul Rate (Flat Rate without Fuel) in the box under Spot Rate. Make sure that you select the correct currency type (USD) and click Accept.
5 Enter Shipment Tracking Messages

Complete the following steps to enter shipment tracking messages in the Logistics Gateway:

1. Navigate to Menu → Web Tenders.

2. Click on the shipment ID of the desired shipment.

3. In the Tracking Messages section of the page,
   - Click the Add Single button to add a single tracking message, or
   - Click the Add Multiple button to add multiple tracking messages concurrently.
5.1 **How to enter tracking messages using the Add Multiple option**

The carrier user may enter the arrival and departure tracking messages using this option.

4. Complete the tracking message fields including the Type, Stop number, Date/Time for each message. Additionally, the user can identify the Trailer Number and BOL Number in the fields at the top of the New Tracking Messages window.

5. Click the Save button to retain changes

5.2 **How to enter tracking messages using the Add Single option**

1. Navigate to Menu → Web Tenders.

2. Click on the shipment ID of the desired shipment.
3. In the Tracking Messages section of the page, click the Add Single button to create a single tracking message. (This option is slightly different from Add Multiple option as this screen gives more fields/options for creating a tracking message.

4. Check Call message is required for all shipments originating from outside of Texas with more than 1 day of transit. A check call can only be created using the Add Single tracking message option).

5. Complete the tracking message fields including the Message type, Date/Time. Other fields can be filled as needed by the carrier user. Click the Save button to retain the changes.

6. The popup screen shows up again to add additional tracking messages if needed.

7. Close the popup screen once all tracking messages are entered. The tracking message information will be shown under the Tracking messages list in the Shipment details page.
6 Viewing Shipments in Archive List

After shipments are processed through the Web Offer List window and Web Tender List window, the system automatically moves certain records to the Archive List section.

The Shipments that are Delivered and Rejected by the carrier are moved to the Archive list at midnight after x* number of days that it is rejected or delivered. (The value of x* is configured on the environment).

The Shipments that are recalled are moved to Archive list after x days provided there is no further update to the shipment in x days.

If the carrier user cannot find a shipment web tender or web offer in the Web Tenders or Web Offers screens, please go to the Archive List page to filter the shipment.

6.1 How to view the shipment in Archive list:

1. Go to Logistics Gateway → Archive List
2. Click on the Filter List and click on New Filter link: The users can filter for shipments in Archive list using optional fields as shown below.
7 Appointment Scheduling

7.1 How to Create a New Appointment

This process is used for creating an appointment for unscheduled, HEB managed freight shipments. If you are attempting to modify the appointment time or date on an existing appointment, please follow the process for How to re-schedule an appointment, outlined later in this document.

1. Navigate to the Web Tenders page (see instructions above)
2. Identify the Shipment needing an Appointment
3. Click the Set link
4. User will be shown available time slots  
   a. Slots are based on Shipment Requested Delivery Date  
5. Click the Circle to the left of the desired time slot

6. Click Select
7. Validate the selected appointment time has been updated

8. Click **Save**
9. User will get see the screen below confirming appointment has been created
7.2 How to Re-Schedule an Appointment

This process can be used to modify the time and date of an existing appointment.

1. Identify the Shipment needing an Appointment
2. Click the Current Appointment Date/Time link
3. User will be directed to the appointment detail screen
4. Check the Box to the left of the appointment ID by clicking it
5. Click the **Edit** button

6. Click the **Recommend Time Slots** button
7. User will be shown available time slots
   a. Slots are based on Shipment Requested Delivery Date
8. Click the **Circle** to the left of the desired time slot

9. Click **Select**
10. Click **Save**

11. Validate the selected appointment time has been updated
7.3 **How to Cancel an Appointment**

1. Identify the Shipment needing to be cancelled
2. Click the **Current Appointment Date/Time** link

3. User will be directed to the appointment detail screen
4. Check the **Box** to the left of the appointment ID by clicking it
5. Click the **Edit** button

6. Select the **Additional Details** tab
7. Scroll down to the bottom of the screen
8. Check the Box next to canceled
9. Utilize the drop down and select **Carrier Cancelled Appointment**
10. Click the **Save** button
11. Validate the appointment status is Canceled
7.4 How to Modify an Appointment Due Date

Business rules related to the process below are defined in section 7.5. Please ensure rules are not violated prior to making date modifications and necessary communication is sent when applicable.

1. Click the Appointment Calendar and select desired day
2. Click **Recommend Time Slots**

3. Refer to instructions above to complete process
7.5 Business Rules and Communication Requirements

1. Date Modifications to Appointments
   a. Authorized to schedule and re-schedule a delivery appointment 1 day before or after requested delivery date
   b. Communicate reason code to **Backhaul Planners** when date is later than requested delivery date
   c. Any requests outside this range will need to be sent to **Marina Abrego, (210) 938-6561**

2. Appointments are **NOT** required for the following shipments
   a. HEB Meat Loads (also known as X-Docks)
   b. Loads routed via traditional LTL providers (YRC, Old Dominion)
   c. PDI loads
   d. HEB Produce Loads

3. Carrier will only have access to schedule shipments tendered by HEB through the carrier portal
4. Carrier will only be able to schedule 1 appointment per shipment
7.6 Error Codes and How to Resolve

The error codes below are the most common but are not all of the error codes you may encounter. In the event an error message is received please contact Marina Abrego (210) 938-6561.

1. Facility Closed: The message below will display if attempting to schedule an appointment for a date where the warehouse is closed.

   ![Message window showing "No recommendation available for given start time."]

2. Appointment Slots Full: The message will display when the appointment slots dedicated for this product type in the warehouse are already fully consumed by other appointments.

   ![Message window showing "No Slot Capacity available."]
8 Invoicing

8.1 How to submit an invoice through the UI

1. Navigate to the Add Invoices page
2. Populate the Carrier Code & Shipment ID fields on the Add Invoice page for a shipment in Delivered status

3. Click Populate Form and validate that all important fields are populate below
4. Validate that the proper Linehaul and Accessorial values are included
5. If any changes are made to the linehaul or accessorial value, click Calculate

6. Copy the value in the Computed Invoice Total field into the Invoiced Shipment Total Field
7. Click Save
8. Validate that the invoice was created successfully

9. Review the Invoice and click Send Invoice