



Otis Supplier - User Guide for Navitrace Portal

Overview

Otis has implemented NFI Industries as our third-party logistics provider for transportation management in North America. With our NFI solution for Otis, we are updating our process for routing Field and OSC PO's.

Going forward, all Field Direct PO's (except those shipping via Parcel) for select suppliers will be routed through the NFI Navitrace web application. This application will provide a more efficient process for routing, tracking, and managing PO's throughout their transportation lifecycle, providing a single source of visibility for all parties.

Going forward, all Field Direct PO's (except those shipping via Parcel) for select suppliers will be routed through NFI in one of two ways; using a routing guide, or NFI's online Navitrace portal. This SOP is for suppliers that have been contacted directly for using the portal.

This process will replace the current state, where Otis suppliers reach out to carriers directly based on the routing guide provided. Instead, going forward, Otis suppliers will enter their PO into the NFI Navitrace web application and NFI will provide the correct carrier & corresponding BOL to use for shipping each load.

Field Direct Supplier – Shipping Instructions

Small Parcel	Provider	Notes
Ground <150 lbs	<ul style="list-style-type: none"> FedEx Ground <ul style="list-style-type: none"> Ground is preferred ship mode 	A valid Otis FedEx Account # is needed to ship on Otis behalf. Account # can be obtained from the purchase order issuer. DO NOT USE THE PORTAL FOR THESE SHIPMENTS.
Air <150 lbs	<ul style="list-style-type: none"> FedEx Express <ul style="list-style-type: none"> Using any service level besides Ground requires approval from the PO issuer. 	

LTL & Heavyweight Air	Provider	Notes
LTL >150 lbs	<ul style="list-style-type: none"> See instructions below for using the NFI portal for scheduling less-than-truckload (LTL) or truckload moves. 	Shipping outside of the NFI portal for LTL or TL may result in chargebacks from Otis to supplier.
Air >150 lbs	<ul style="list-style-type: none"> PO issuer can confirm which service to use. <ul style="list-style-type: none"> UPS Supply Chain Solutions (UPS-SCS) FedEx Express Freight 	



Purpose

This guide is to serve as the means to help Otis Vendors navigate and operate the Navitrace application. This includes the entry of new Purchase Orders.

- Navitrace is our third-party transportation management provider's portal for suppliers to create shipments for Otis.
 - This portal is managed by NFI
- The portal is linked below. You may reach out to otis@nfiindustries.com for assistance in getting a login set up
 - [Navitrace Login](#)
- Instructions for using the portal are found below.

Navigating within Navitrace

The Order Entry page – this serves as the means to create the order in our system based on what you have been asked to ship to Otis.

Entering Orders in the Order Entry page

This page gives you the ability to create an order based on what you have been asked to ship to Otis. The following section will give you detailed information on how to populate this page. Please note that all of the required fields are marked with a red asterisk.

1. Order Information section

In this section you will enter the PO#, and the required equipment based on the product you are shipping (choose from the provided drop-down).

The 9 digit BU# / Office Code must be entered in one of the PO# fields in order to avoid credit holds or delayed delivery of your shipments.

Additionally, any special comments or instructions you feel are necessary to describe the freight can be entered in the comment section.

Lastly, you can also highlight that an Order contains Hazardous materials and provide the necessary data if it is a HazMat Load.



Once you see the address that matches, you can click on your selection and the address information will be populated in the individual fields for you. **Please note that you should contact NFI if you do not see a required address – we have the ability to add this for you quickly.**

Stop Information

PICKUP LOCATION ~ If this shipment is a round trip service please enter the same address for

Location Search

flor

Otis Florence-1500 Otis Way--Florence-SC-29501 Line 2

City* State* Zip* Country*

United States

Please note that the same process should be utilized for the Pickup and the Delivery Stops. If a loading appointment has already been determined/scheduled, then the vendor will need to indicate this by clicking on the SET PICKUP APPT and then populating the PICKUP APPT DATE and PICKUP APPT TIME. Please note that the Appt Time is in military format (2400 hours).

PICKUP LOCATION ~ If this shipment is a round trip service please enter the same address for

Location Search

start typing...

Address Name* Address Line 1* Address Line 2

City* State* Zip* Country*

United States

Set Pickup Appt.

Pickup Appt. Date* 06/26/2024

Pickup Appt. Time 09:00



3. Freight Information

In this section, you will enter the Product information. All fields in this section are required so you enter data into each field that describes your freight as accurately as possible. To determine the class of the shipment, you must utilize the Otis provided freight class calculator.

Freight Information

Handling Units*	UOM*	Pieces*	UOM*	Volume (cubic ft.)*
<input type="text" value="12"/>	<input style="border: none; background: none; text-decoration: none; padding: 2px 5px; font-size: 0.9em; font-family: sans-serif; color: #333; cursor: pointer; border-bottom: 1px solid #ccc; border-right: 1px solid #ccc; border-left: 1px solid #ccc; border-top: 1px solid #ccc; width: 100%;" type="text" value="Pall"/>	<input type="text" value="110"/>	<input style="border: none; background: none; text-decoration: none; padding: 2px 5px; font-size: 0.9em; font-family: sans-serif; color: #333; cursor: pointer; border-bottom: 1px solid #ccc; border-right: 1px solid #ccc; border-left: 1px solid #ccc; border-top: 1px solid #ccc; width: 100%;" type="text" value="Case"/>	<input type="text" value="650"/>
Net Weight (lbs.)*	Freight Class*	Stackable Pallets*		
<input type="text" value="14257"/>	<input style="border: none; background: none; text-decoration: none; padding: 2px 5px; font-size: 0.9em; font-family: sans-serif; color: #333; cursor: pointer; border-bottom: 1px solid #ccc; border-right: 1px solid #ccc; border-left: 1px solid #ccc; border-top: 1px solid #ccc; width: 100%;" type="text" value="60"/>	<input style="border: none; background: none; text-decoration: none; padding: 2px 5px; font-size: 0.9em; font-family: sans-serif; color: #333; cursor: pointer; border-bottom: 1px solid #ccc; border-right: 1px solid #ccc; border-left: 1px solid #ccc; border-top: 1px solid #ccc; width: 100%;" type="text" value="Yes"/>		

A default of 40 lbs per pallet will automatically be added once submitted.

Rules for this section:

- The Handling Units are for the number of pallets. If you have a product that is not palletized, you should simply enter 1 Pallet.
- The Pieces are the number of individual Cases or individual pieces of the product(s)
- The Volume and Net Weight fields are for the entire Shipment (please also note that a default of 40 lbs. per pallet will automatically be added once submitted.)

Please click on the “Submit” button to enter the Purchase Order once you review the information that was entered. Once you complete this action, you will receive a confirmation on the screen that the Purchase Order saved. If any updates / Charges are required after you submit the Purchase Order, you must contact NFI to update the Purchase Order.

Planning of the Shipment and email alert

NFI Operations will have access to the Purchase Order once it’s been submitted in the portal. Once the Shipment is planned and accepted by the carrier, you will receive an email listing the key pieces of information – here is an example:

Subject line: Load Scheduled – 5644456 (5644456 is the Purchase Order # that was entered)

See example image on the next page



LOAD SCHEDULED ALERT
A Load L191115-00002 was scheduled with carrier: **Lennox Carrier**
Organization Name: LENNOX
Load Number: **L191115-00002**
Mode: TL
Equipment: Standard Dry Van
PO#: 5644456
Order Number: IB-1046
Pickup: Vendor G
•Expected Arrival: 11-18-2019 08:00
Delivery: Lennox Stuttgart
•Expected Arrival: 11-20-2019 12:30
Freight Information:
•Piece Count: 2000
•Gross Weight: 37,800 Lb
•Gross Volume: 2,500 CuFt

Carrier Name
Load/shipment Number
PO Number
Expected Pickup Date/Time
Expected Delivery Date/Time

Special Note - Expedite Process

In the event of an Expedited requirement, you must follow these steps:

1. NFI must be contacted with any PO that needs to be expedited by sending email correspondence to OTIS@nfiindustries.com PRIOR to entering in the shipment into the portal. NFI will need approval from Otis to proceed with the shipment. Please include the Otis Approver requesting the expedite, in the email request.
2. Expedited orders should be entered into the portal with an 'EXPEDITE' notation in the comments field and delivery date. Please see example below:



Order Entry

Order Entry Information

PO#* Sales Order # Equipment*

ABC123456 XYZ9876 All Dry Van

Comment

pallet 1 42x40x36
pallet 2 42x48x48

Hazmat

Expedited Approver Name* Expedited Reason Code*

 Jane Doe @ Otis Supplier Behind Schedul

3. NFI will tender out the shipment to the carrier as quickly as possible once the order is received and expedite as necessary.

4. You will receive the Load Alert via email as usual and confirm information is correct. If any information is incorrect, please notify NFI immediately via email at OTIS@nfiindustries.com with corrections that are to be made.

Searching and Viewing previously Created Purchase Orders on the Search POs page

This screen will serve to display Purchase Orders that you have already created as well as their latest Plan / Status.



1. Filters

There are several filters at the top to help you find the Purchase Order you are looking for. You can search by the following fields:

- Purchase Order Creation Date
- Purchase Order Number
- Origin City
- Destination City



Once you type information in any of these fields, the list of Purchase Orders will filter based on the information entered – here is a search for shipments leaving from “Camden”:

A screenshot of a search interface for Purchase Orders (POs). The interface includes a header 'POs' and several filter fields: 'POs created' (set to 'in the past 7 days'), 'All Statuses', 'PO#' (empty), 'Camden' (with a red arrow pointing to it), and 'Destination City'.

2. More Information

Once an order has been planned and accepted by the proper carrier, you can come here to view more information about the Purchase Order (including its status). The icon next to each order (shown with arrow below), that when clicked, will take you to the order details page.

Status	Order#	PO#	Created On	Requested Arrival	Quantity	Weight	Volume	Origin	Destination	Actions
Closed	IB-1003	678910	11/5/2019 10:37:33 AM	11/15/2019	147	1100.00	358.00	Camden, NJ	Voorhees Township, NJ	

Once you click on this box, the full Load details will show. This page will display additional items like appointments; the carrier selected, and document management (where you can get the BOL).

3. Document Management

This section allows you to pull the BOL from the system and upload the required documents for Exports (such as the Commercial Invoice and Packing Slip). In order to enter this section, please go to the Carrier section of the screen and click on the Documents button. This click will allow you to see the BOL that has been created (please note that this will only be seen after the Shipment has been accepted by the carrier) and upload additional documents. Please note that you can also see a copy of the Vendor alert that was sent to you in this section:

A screenshot of the 'Carrier' document management interface. It features a header 'Carrier' and two tabs: 'Info' and 'Documents' (with a green badge showing '2'). Below the tabs is a table with columns 'Type' and 'Link'. The table contains two rows: 'BOL' and 'Vendor Alerts', each with a blue document icon in the 'Link' column. At the bottom left, there is an 'Upload Document' button.

In order to view/download the documents, you should click on the icon on the document line.

Within this window, you should choose the Document Type that you would like to upload and click on the Upload button. This document will then be saved to the Order / Shipment. Please note that if the Shipment changes significantly (and you have requested that we update the Order for you), we have the ability to generate a new/updated BOL for you when you request it. We can also delete Documents for you if you have any errors in the upload process. You simply need to contact us in either case.