PA Management Workflow

STEP1

PA CREATION

Sales rep. will use **PA Intake Workbook** to propose customer rate, ensuring all requirements are **met**.

Required Tabs:
Intake Tab, Tariff Tab, Accessorial tab.

Required Fields:
Customer email, Debtor Code, Customer Name, Fuel, Traffic Type, Lane, Area(s), Rate(s), Date(s).

STEP2

REVIEW

Sales rep. will send completed Intake workbook to **pricing requests** email.

Sales rep. will be advised if anything is missing or needs to be corrected. It is the Sales rep.'s responsibility to make sure this gets done & re-sent. There will be NO system entries without approval and all PA requirements must be completed.

STEP3

FINAL PA REVIEW

Ron & Rhea to provide final analysis to Katie, for approval.

Upon approval, Rhea will convert to PDF and request e-signatures via email.

Signatures required:

- Katie
- Customer

STEP4

PA ENTRY

After approvals and signature requirements are met, Rhea will add PA into TEST & PROD, send to pricing group, & store in M drive.

Sales Rep. will forward emailed completion confirmation & PA to any other parties on need to know basis.

STEP5

Quality Assurance

Missy will assign auditor.
Account will be placed on audit. The assigned auditor will ensure everything is rating as expected.

Rhea to fix, modify, add new charge codes as needed, approved by Katie/ corporate management.

STEP6

PA CLOSURE

A copy of signed PA will be placed in M drive after AT entry.

Sales Rep. will follow up with customer, as well as auditing and systems teams, as needed.

Final copy will be in .PDF format. E-signature recipients will have an emailed copy, already.