Order Entry Accuracy for Customer Service Representatives

Prepare to enter shipment orders accurately into the Transportation Management System (TMS) — reducing downstream errors and ensuring full compliance in a high-volume, regulated environment.

DIGITAL COURSE

10 MODULES

Meet the Learner

Who This Course Is For

*You are a **new Customer Service Representative** working in a fast-paced, regulated logistics environment. Every day, you process high volumes of shipment orders where precision is not optional — it's required.*

- *Recently onboarded to the CSR role*
- *Working with live TMS data affecting real shipments*
- *Subject to compliance standards and internal SOPs*

High Volume

Dozens of orders processed per shift

Regulated

Federal and trade compliance rules apply

Precision Required

Entry errors create costly downstream delays

Learning Objectives

By the end of this course, you will be able to:

1
Identify Mandatory Fields *Recognize which TMS fields are required before a shipment order can be submitted.*

2
Enter Shipment Data Accurately *Input all required information using correct formats, units, and data types.*

| 3 |
|---|
| ### Recognize Common Entry Errors

Spot and correct the most frequent mistakes before submission — preventing downstream issues. |

4
Escalate Issues per SOP *Know when a problem exceeds your authority and follow the correct escalation path.*

*All four objectives are assessed for compliance. An **80% passing score** on the final quiz is required to complete this course.*

TMS System Overview
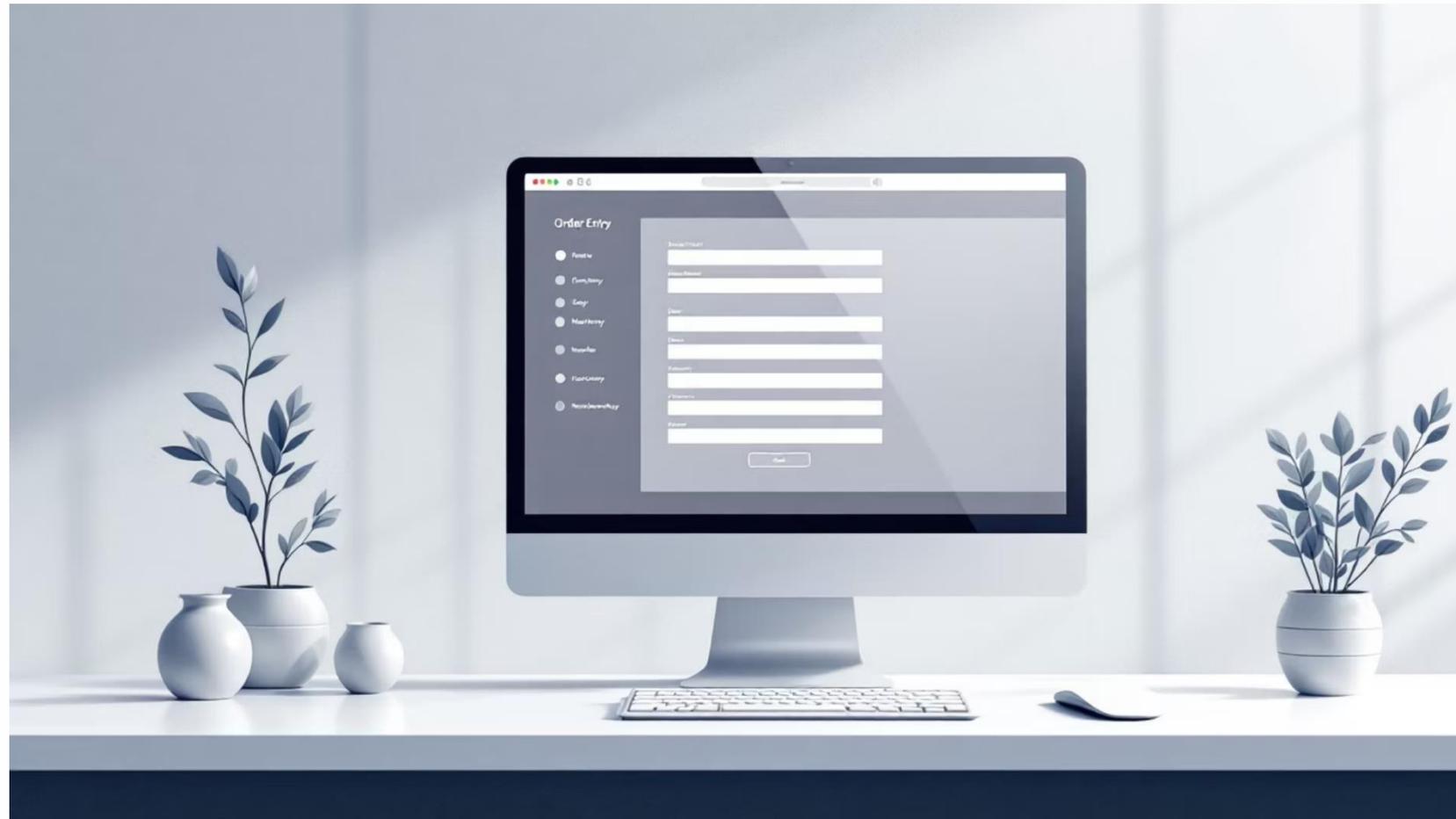
Navigating the TMS

The TMS is your primary tool for creating and submitting all shipment orders. Understanding the interface layout is the first step to accurate data entry.

- *Each section of the form corresponds to a shipment data category*
- *Required fields are visually flagged for quick identification*
- *Validation runs automatically before submission*

Key Rule: *Fields highlighted in orange are* **mandatory.** *A shipment order cannot be submitted until all orange fields are complete and correctly formatted.*
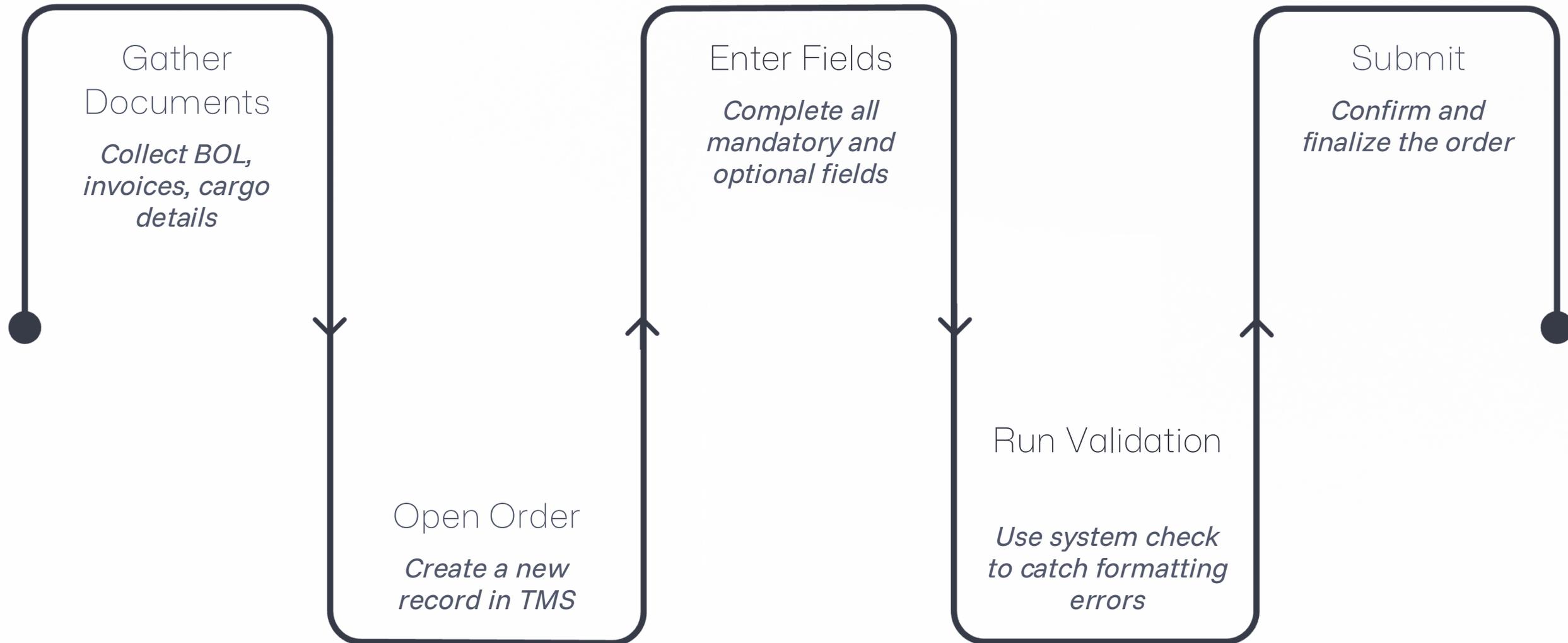
Mandatory Field Identification

Required fields differ based on shipment type. Use the table below as a reference guide during order entry.

Category	Domestic Shipments	International Shipments
Shipper Info	Name, Address, Phone	Name, Address, Phone, Country of Origin
Consignee Info	Name, Address, ZIP Code	Name, Address, Country, Postal Code
Cargo Details	Weight (lbs), Dimensions, Class	Weight (kg/lbs), Dimensions, HTS Code
Documents	Bill of Lading (BOL)	Commercial Invoice, Packing List, BOL
Compliance	Hazmat flag (if applicable)	Export License, ECCN, Harmonized Tariff Code

International note: The **Harmonized Tariff Schedule (HTS) Code** is a federally required field for all cross-border shipments. Incorrect or missing HTS codes may result in customs delays or regulatory penalties.

The Data Entry Workflow

Follow this five-step sequence every time you enter a shipment order into the TMS. Skipping steps is a leading cause of entry errors and compliance flags.

Gather Documents

Collect BOL, invoices, cargo details

Open Order

Create a new record in TMS

Enter Fields

Complete all mandatory and optional fields

Run Validation

Use system check to catch formatting errors

Submit

Confirm and finalize the order

*The **Run Validation** step is critical — never skip it. The TMS will flag missing or incorrectly formatted fields before the order is locked in the system, giving you the opportunity to correct errors without supervisor escalation.*

Error Recognition: Correct vs. Common Mistakes
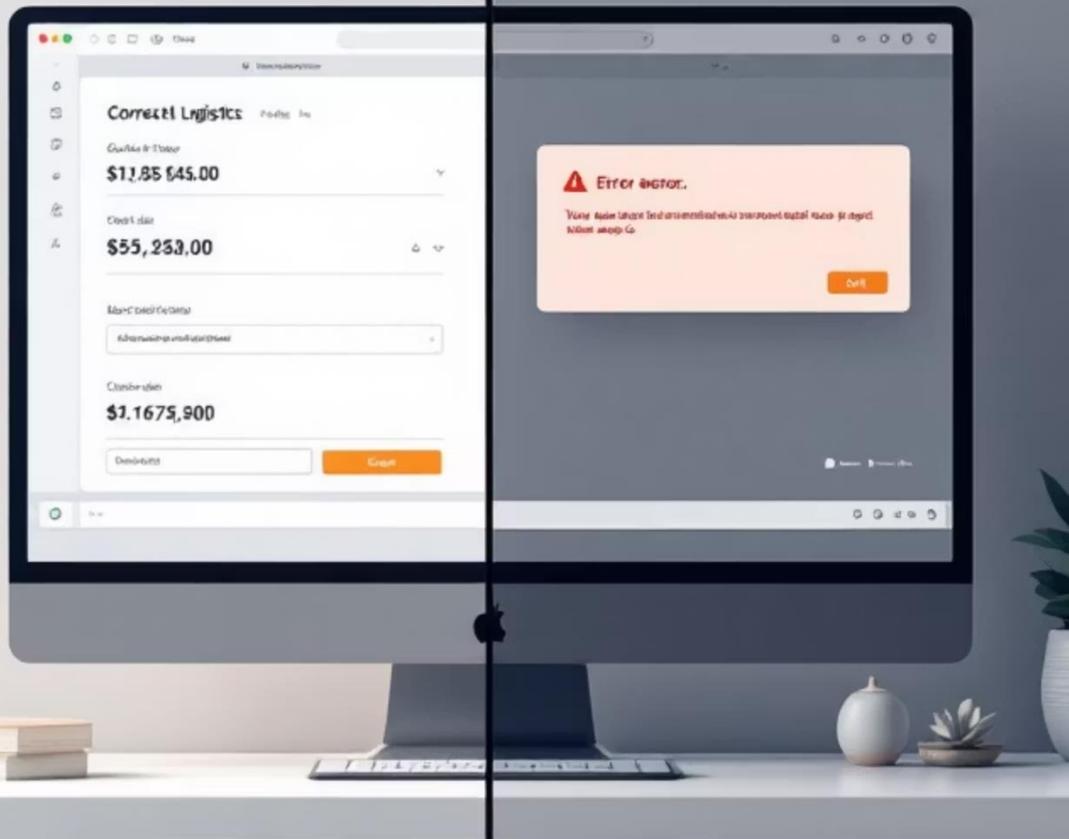
✅ Correct Entry

- **Weight field:** 1250 (numeric only)
- **HTS Code:** 8471.30.0100 (proper format)
- **ZIP Code:** 30303 (5-digit numeric)
- **Date:** 07/18/2025 (MM/DD/YYYY)

All values match the required field format. The TMS validation check passes with no flags.

❌ Common Errors to Avoid

- **Weight field:** `1250 lbs` — *text in a numeric field causes a system rejection*
- **HTS Code:** `84713001` — *missing decimal formatting triggers a compliance flag*
- **ZIP Code:** `30303-1234` — *extended format not accepted in this field*
- **Date:** `July 18` — *free-text dates will not pass validation*

Knowledge Check

Question

A CSR enters a shipment to Germany. The TMS flags an error on the cargo line. Which of the following is the most likely cause?

Why This Matters

*The **HTS Code** is a federally mandated numeric field. Any text or special characters in this field will trigger an immediate TMS validation failure — and may delay customs clearance.*

> 🗒 **Correct Answer: B.** *The HTS field requires a properly formatted numeric code (e.g.,* `8471.30.0100`*). Text input is incompatible with the field type and will block submission.*

📌 *Note: This course currently assesses Objective 3. Objectives 2 and 4 (accurate data entry and escalation procedures) should be measured in future assessment iterations.*

A. *The consignee phone number was left blank*	**B.** *The Harmonized Tariff Code (HTS) field contains text instead of a numeric code*	**C.** *The shipment weight was entered in kilograms*	**D.** *The BOL number was entered in lowercase*

Escalation Procedures

Not every error is yours to resolve. Use this guide to determine when to fix an issue yourself and when to escalate to your supervisor immediately.

Situation	🖊 Fix It Yourself	🚨 Escalate to Supervisor
Formatting error on a field	Correct the format and re-run validation	—
Missing document before submission	Retrieve the document and attach before submitting	—
HTS Code not recognized by system	—	Escalate immediately — compliance risk
Consignee data does not match records	—	Escalate — possible fraud or data integrity issue
Order already submitted with errors	—	Escalate — corrections require supervisor override
System validation repeatedly fails	Try once more after reviewing all fields	Escalate if failure persists after second attempt

🗋   📌 **Design Note:** This section covers escalation steps (Objective 4) but does not yet include a **practice scenario**. Adding an applied simulation or role-play exercise here is recommended to reinforce procedural competency before the final assessment.

Final Summary & Compliance Requirements

Objective 1
Identify all mandatory TMS fields for domestic and international shipments

Objective 2
Enter shipment data using correct formats, units, and data types

Objective 3
Spot and correct the most common data entry errors before submission

Objective 4
Apply the correct escalation path when issues exceed your authority

⚠️ **Compliance Requirement:** *An **80% passing score** on the final quiz is required to receive course completion credit. This record is stored in the LMS and may be reviewed during audits. If you do not pass, you must retake the full assessment before resuming active order entry duties.*