WEB ACCESS: DOCUMENT MANAGEMENT SYSTEM

By

W.G.McKay Limited

W.G.McKay Limited

- **Web Access**
  - Availability of Shipment Data for clients use
  - Document Management System

- **Electronic Invoicing**
  - Providing Transactional Data in non-traditional formats

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Web Access
www.wgmckay.com

- Once import records (B3 forms) are generated, they, and the backup used are available for viewing or download (as pdf files)

- Each client is allowed 1 Secure login with ID and password

- Access is through the W. G. McKay website
  - www.wgmckay.com

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Web link > shipment data, B3, invoicing

Web link > shipment data, B3, invoicing

Web link > shipment data, B3, invoicing

Document Management Processes

- Once the system is accessed, you will have the option of scrolling down through files, or searching for specific criteria with a dropdown search menu:

Document Management Processes

- Cargo Control Number   (Carrier's Unique Identifier for shipment)

- Container Number   (Ocean Container or Rail Car)
- File Number   (McKay internal reference)
- Transaction Number   (14 digit bar code)
- Order Number   (Purchase Order shown on documents)

- Release Date Range   (dates the shipments are released from Customs control)

- Invoice Number   (McKay billing)
- Invoice Date Range   (McKay billing)

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Document Management Processes

- Once you have located the files needed, you check the box beside the document you wish to review: (the 'select all' option for each file will select all documents for that file)

- This triggers a download of that document

- **NB once you have downloaded a file it will disappear from the display, but will still be available as a search item**

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Document Management Processes

- B3   (B3 form that corresponds to the Cargo Control Number and Transaction Number)

- CCI   (Document created by the system with the data keyed)

- Invoice (number and date)   (McKay billing)

- In addition, there will be other documents, consisting of scanned copies of originals received for each shipment (from yourselves, your shippers or carriers).

  - THIS IS A FEATURE THAT MUST BE ACTIVATED PRIOR TO USE

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Document Management Processes

- Once you have chosen the files, at the top and bottom of the page are the download options:
  - multiple documents (individual pdf files [pages] in a zip file)
  - single document (one pdf of multiple pages)

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Electronic Invoicing

- 'Traditional' Invoicing
  - Transactional
  - Paper
  - Copies of B3s, Vendor & Carrier Documents

- 'Non-Traditional' Invoicing
  - Combination (mix and match) of:
    - Paper combined with Electronic data
    - Electronic Data Only
    - Imaged documents

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- ## 'Non-Traditional' Invoicing
  - ### 'Summary Billing'
    - **PAPER**
    - Transactional
    - Consolidated Periodic Invoice
      Daily/Weekly/Monthly
      Depending on Volumes
    - Each file invoiced and 1 consolidated invoice issued with recap covering all billings within the period
    - Consolidated Invoice and all files couriered

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- ## 'Non-Traditional' Invoicing
  - ### 'Summary Billing'
    - **PAPER/ELECTRONIC**
    - Transactional
    - Consolidated Periodic Invoice

      Daily/Weekly/Monthly

      Depending on Volumes
    - Each file invoiced and 1 consolidated invoice issued with recap covering all billings within the period
    - Consolidated Invoice (PDF) Emailed, backup couriered

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'Non-Traditional' Invoicing

'Summary Billing'

- **ELECTRONIC**
- Billing and B3 data stored as TEXT files
- Consolidated into ZIP file
- Each file record stored in 3 files

  B3 – CCI – Billing Invoice
- Consolidated Billing covers all records in period
- Backup for additional billings sent by courier
- ZIP files emailed or sent on CD
- Imaged copies available online

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W.G. McKay Ltd.

- What we have shown you here is part of W. G. McKay's commitment to move forward in new and challenging ways.

- As part of this commitment, the majority of our business is now transacted in a secure 'cloud' environment.

- Our offices are equipped with fax/scanners that send incoming faxes to emails rather than printing. These documents are then added to the online record

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- For more information on these topics
- **Web Access**
  - Document Management System

- **Electronic Invoicing**
  - Providing Transactional Data in non-traditional formats

- **EDI links & inbound shipment data**
  - Moving Data into the McKay system

- **Business Metrics**
  - 'Live' release Data available online
  - 'Historical' Transactional Data available by report

Please contact Joe Rose (jrose@wgmckay.com)