SALES
Credit (Y or N?)
Customer Quote
MSA / Broker Shipper Agreement
Customer Setup Kit sent and completed by Customer
Customer information & Credit Limits input in system
PO/Project received from customer (# of Loads)
Complete Project Planning Document
Loads received and built in the system
Loads posted on load boards
Quote / Find Trucks
Broker/Carrier Agreement Signed by Carrier (Insurance Required)
Rate Con sent to Carrier
Carrier dispatched to pick up load (Check Calls performed enroute)
Load Delivered
Load marked completed in System (Awaiting Billing)
w/in 48 Hours Wait for Invoice/BOL
Invoice Received (from carrier or factor)
Input Carrier Payables in System (Billing Complete)
Organize Billing documents according to Project Terms
Send Invoice to Customer (OperFi Factoring Submission)
30 Day Wait Period
AR/AP (OperFi Processes)
1.Paid by Custoner
2.Pay Carrier
DONE