Infios Carrier Resource Packet

<u>Getting Started</u>

Request Access to www.myshipinfo.com

Please fill out the below form to request a username and password for our system so you can view the status of your invoices, locate remittance, and more.
https://www.myshipinfotraining.com/new-carrier-user

Establish an EDI Connection (Preferred)

Please fill out our EDI setup form: https://www.myshipinfotraining.com/edi-setup-form. Once submitted, the Carrier Services team will obtain approval to move forward with the setup from the customer. From there, a ticket will be entered with our EDI Support team to complete the setup. If you have any EDI related issues, please reach out to our carrier services team with the details of your issue at carrier.services-env@infios.com. They will obtain all the necessary information and open a ticket for our EDI team to advise further.

Visit the Infios Online Carrier Training Center

Our dedicated carrier training center has quick, helpful videos to show you tips and tricks on MSI – including invoice loading, configuring invoice lookup columns, locating remittance detail, and more. Check it out at: myshipinfotraining.com/carrier-training-center

Sign up for a live MSI training hosted by the Infios Carrier Services team

The Infios Carrier Services team hosts a live training on the second Friday of every month. The training covers how to search your invoices in MSI, how to pull remittance, action the task list, and more. To register, please fill out the following linked form: https://www.myshipinfotraining.com/msi-webinar-signup

Infios Carrier Resource Packet

Infios Audit Flow Chart

Please note:

If you have an invoice in "Pending Carrier Review" status, the carrier will need to review, action, and send the invoice back to the auditor in MSI for the invoice to return back to audit. Please reference the following video tutorial on this process:
https://www.myshipinfotraining.com/review-carrier-task-list
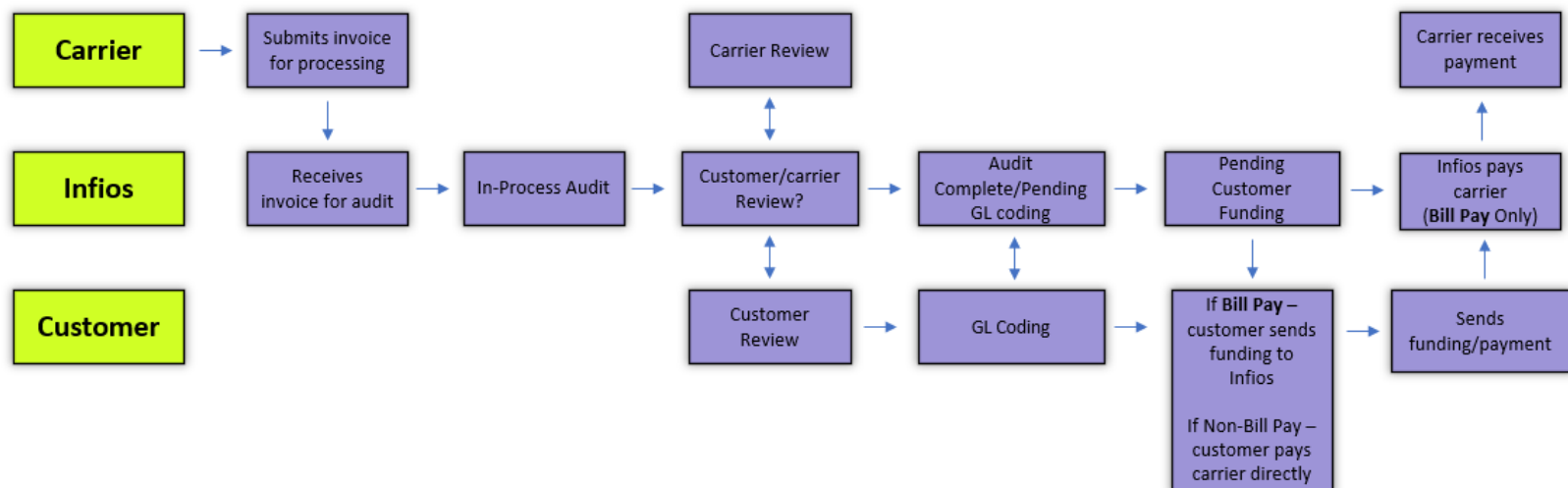
Please note: (Payment Processing Clients Only)

Each individual customer sends funding to Infios differently. Not every customer sends funding to Infios on the same day. Please allow our mutual customers time to fund pay runs, once the funding has been received, payment will be issued within 24-48 hours.

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Invoice Status Definitions
(At a glimpse)

Scanned	PDF Invoice has been loaded into MSI and is awaiting keying by data entry
In Process - Audit	In Audit Queue
Pending Auditor Clarification	Auditor clarification needed for data entry question - Our data entry team has a question on how to key the invoice. This question is sent to the auditor to clarify details
Pending GL Coding	Invoice processing completed - needs GL code provided by customer to close into a pay run
Audit Complete	Invoice processing completed - will appear on the next available pay run based on net pay terms
Pending Customer Funding Bill Pay Clients Only	Invoice closed into a pay run - Approved amount for invoice has been reported to the customer for funding. Once Infios receives the funds (on average within 5-10 days, but dependent on customer), payment will be issued within 24 hours.
Pending Customer Funding Non-Bill Pay Clients	Invoice closed into a pay run - Approved amount for invoice has been reported to the customer for funding. For non-bill pay clients, Infios has no visibility to payment information beyond "Pending Customer Funding". Please contact the customer directly for payment detail.
Payment Processing Bill Pay Clients Only	Funding has been received - payment is issued within 24-48 hours
Payment Processing Non-Bill Pay Clients	Never Applies and will not be used for non-bill pay clients
Paid Bill Pay Clients Only	Invoice completed entire process including payment. Payment details and payment information is now available in MSI
Paid Non-Bill Pay Clients	Does not apply to non-bill pay clients

To see the **full list** of statuses and their definitions, please visit the below link found in the Infios Carrier Training Center: https://www.myshipinfotraining.com/invoice-status-terms

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<u>Infios Audit FAQ's</u>

Q: How long does it take for a PDF invoice to be loaded into MSI once I send it?
A: Typically, it will take 3-5 days for an invoice to be loaded, keyed, and reviewed for quality assurance before reflecting status in MSI.

Q: If my invoice was short paid or zero paid, what should I do?
A: You are able to review the short pay or zero pay reasoning independently in MSI, or you can reach out to carrier.services-env@infios.com for assistance. To submit a balance due invoice, please send the invoice via PDF copy to audit.invoices-env@infios.com for processing.

Q: I am setup on EDI, but I am sending PDF invoices to audit.invoices-env@infios.com for processing and they are not being loaded into MSI. Why are they not being loaded?
A: If you have an established EDI connection, original invoices should always be triggered via EDI for processing. Only balance due and corrected invoices can be sent via PDF copy to audit.invoices-env@infios.com for processing.

Q: I received payment from **Infios** but did not receive any remittance details to go along with the payment. Where can I view remittance details?
A: (Payment Processing clients only) The Carrier Services team can set up your team to receive automated remittance reports that are sent directly to your email inbox. You can also retrieve remittance detail independently on MSI using the pay run number. Please visit the below link on our Carrier Training Center to view the remittance tutorials: myshipinfotraining.com/carrier-training-center.

Q: How come I never get an email reply from audit.invoices-env@infios.com?
A: audit.invoices-env@infios.com is dedicated to the submission and loading of invoices only. For all invoice and payment inquiries, please reach out to carrier.services-env@infios.com and our dedicated Carrier Services team will be glad to assist you.

Q: Why has my invoice been "stuck" in Pending Customer Funding status for so long?
A: If the customer is an Infios bill pay client, funding time will vary by customer. Infios has no visibility as to when a customer will provide funding. If your customer is a non-bill pay client, please reach out to the customer directly for payment detail, as Infios has no visibility beyond 'Pending Customer Funding' status.