



CHEP Corrections Manual Step By Step Guide on Managing Your Corrections Easily

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Processing a transfer

Please ensure your transfer meets one of the following guidelines to be processed by CHEP:

1. **Send to CHEP** within 90 days of the date of the movement.

2. **Send to CHEP** after 90 days **only** with the written authority from the receiver.

The above guidelines are the standard CHEP processing terms. Please be aware that these may be different to trading terms agreed with your trading partners. Such agreements override the standard CHEP processing guidelines.

Making changes to a transaction

Refer to this checklist below when you are making changes to the transfer.

What items can you change on a transaction that has already been processed by CHEP?

1. **Effective Date** - the day when the sender stops paying hire and the receiver starts paying hire
2. **Equipment Type** - for example, pallets
3. **Equipment Quantity** - the number of items of equipment transferred
4. **Sending Account** - where the transfer came from
5. **Receiving Account** - where the transfer is going to
6. **Cancel the transfer completely**



Correcting a transaction

Do you need to correct a CHEP transfer?

Here are some questions you need to consider:

1. Is the transfer already processed with CHEP?

YES:

To make a change to the transfer you need to request the change from nzcustomerservice@chep.com or by phone on 0800 652437

NO:

Simply make changes on the transfer before sending the transfer to CHEP

2. Has the transfer already had a correction made to it?

YES:

CHEP will only make further changes if both trading partners agree to the change in writing

NO:

You can request a correction with CHEP

3. What is the date of the transfer? Is it current, *i.e.*, invoiced by CHEP with the last 21 days?

YES:

If the transfer was invoiced by CHEP within the last 21 days, you can make a correction request

NO:

Transfers invoiced outside of 21 days require both trading partners to agree in writing for CHEP to process a correction



Processing a correction via Portfolio Plus

CHEP will reverse a docket when CHEP has received notification from the account holder no later than 21 days from the invoice date.

However - you can make the changes on your transaction yourself via Portfolio Plus. Here are the steps to show you how:

- 1 Log on to Portfolio Plus
- 2 Click on Quick link Corrections and Transactions

Quick Links

- Enter Transactions**
Process or record all Transfers In and Out
- Enter Orders**
Advise CHEP of Issue or Return Order
- Review Transactions**
View Suspended and Rejected Transactions and amend Suspended dockets
- Authorise Transfer**
View Transfers waiting to be authorised
- Corrections & Transactions**
Enquire on Transactions, Reprint a Docket, Correct or Reverse a Docket
- Customer Hire Balance**
Get a monthly tally of all Transfers In and Out
- Bulk Entry**
Import, enter and review bulk transactions

[Register User](#)
[Deactivate User](#)
[Add/Remove Reporting Location](#)
[Add/Remove Equipment](#)
[Stationery Request](#)

- 3 Enter the docket number and click submit.

Transactions

Reporting Location:

Transaction Type:

Service Centre/Plants:

Other Party:

Reference:

Other Reference:

Docket No.:

Capture Date From: To:

Effective Date From: To:

Shipment/Delivery From: To:

- 4 Click Correction to make a change or reverse to cancel a docket.

Transactions >> Transfers In Detail

Reporting Location: 1610100211, CHEP Portfolio Test Ac No 2, North Ryde

Docket Number: 2012000001318

Other Party: 1610100210, CHEP Portfolio Test Ac No 1

Transaction Type: Transfers In

Correction Comment:

Correction No:

Cancel Reason:

Transporter: CLIENT OWN TRANSPORT

Vehicle:

Driver:

Effective Date: 20/02/2012

Reference: 12345

Shipment/Delivery Date: 20/02/2012

Other Reference:

Capture Date: 20/02/2012

TDR No:

Captured By: 100768

Equipment Code	Equipment Description	Quantity
4113	UNICOH 275/1040 CONTAINER	10

Row 1 of 1



- Type over any incorrect details: This could be Other Party, Shipment and/or Effective date, Equipment Code, and/or Quantity. Click **Submit** to make the correction.

Transfer In | Transfer Out

Reporting Location: 1610100211, CHEP Portfolio Test Ac No 2, North Ryde

CHEP Docket Number: 2012000001318 Manual System

Received From: Previously Used Codes

Other Party: 1610100210, CHEP Portfolio Test Ac No 1 [Search Locations](#)

[Add Direct Delivery](#)

Direct Delivery Location: [Search Locations](#)

Reference *: 12345 Transporter *: CLIENT OWN TRANSPORT

Other Reference: Driver Name:

Delivery Date *: 20/02/2012 Vehicle Reg No:

Effective Date *: 20/02/2012

[Extra References](#)

Equipment Moved

[Add Equipment](#) [Remove](#)

Equipment *	Quantity *
4113-UNICON 275/1040 CONTAINER	1

Row 1 of 1

[Submit](#) [Cancel](#)

- The correction is completed. Click **OK** to save or **PRINT** to print a copy.

SUCCESSFUL

Movement Successfully Submitted using Docket Number : 2012000001318
The Document was submitted as a Transfer In Movement

[OK](#) [PRINT](#)

- Now you can see the docket has T1, T2 and T3. They are all listed as the T1 docket number to show they are linked. Click on the T3 hyperlink to see the correction docket that will appear on your next invoice.

▶	2012000001318-T1	Transfers In	20/02/2012	20/02/2012	20/02/2012	1610100210, CHEP Portfolio Test Ac No 1	12345
▶	2012000001318-T2	Reverse Transfers In	20/02/2012	20/02/2012	20/02/2012	1610100210, CHEP Portfolio Test Ac No 1	12345
▶	2012000001318-T3	Corrections In	20/02/2012	20/02/2012	20/02/2012	1610100210, CHEP Portfolio Test Ac No 1	12345

Written Authority

When written authority is required, you must have written authority from the affected party. This is the party which will be charged more by correcting the docket. This may either be the **Sender** or **Receiver** depending upon the correction made.

If the quantity is to be changed ...

... to be **INCREASED**,
authority from the **Receiver**
is required.

... to be **DECREASED**,
authority from the **Sender** is
required.

Material (equipment):

If you **ADD** another type of
equipment to a docket,
authority from the **Receiver**
is required.

If you **REMOVE** a type of
equipment on a docket,
authority from the **Sender** is
required.

CHANGING the equipment type on a docket requires written authority. If the equipment is ...

MORE EXPENSIVE to hire
than the original equipment,
authority is required from
the **Receiver**.

LESS EXPENSIVE than the
original equipment, authority
is required from the **Sender**.

If the effective date is being moved into the ...

... **FUTURE** (forward),
written authority from the
Sender is required.

... **PAST** (back), written
authority from the **Receiver**
is required.



If the trading partner account number is being changed ...

If the **ORIGINAL RECEIVING PARTY** is to be changed, authority from the **new Receiver** is required.

If the **ORIGINAL SENDING PARTY** is to be changed, authority from the **original Sender** is required.

What happens when a transfer is processed the wrong way around?

If a docket is to be corrected because it was raised the **WRONG WAY AROUND**

- If notified to CHEP within 21 days of appearing on the CHEP invoice, process correction as normal
- If notified to CHEP outside of 21 days of appearing on the CHEP Invoice, we need authority from the **original Sender**. This is because they will become the receiver, having 2 lots of equipment going onto their account as a result of the correction (The reversal and the replacement).

Example of written authority

Below is an example of how you can provide notification to CHEP (*i.e.*, a written authority) by sending an email.

Example of a customer email (written authority):

Dear CHEP Customer Service,

I authorise the correction of docket ABCD00004091A.

The receiving account should be my account, Global Distribution account number 6400999999.

Kind regards,

Customer



Points to remember

CHEP will correct or reverse a transaction when notified in due time.

What does due time mean?

Due time means within 21 days of the transaction appearing on the CHEP Invoice.

Notifying after due time?

If you have notified after due time please provide written authority from the trading partner whom will be affected by the correction or reversal to be done.

What does affected mean?

The affected party is the CHEP customer who, due to the changes made by the correction or reversal, will end up with more equipment or will incur increased financial charges