

Order Management Bookings - Getting Started Guide for Shippers

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Order Management Bookings Getting Started Guide

Purpose of this Document

The purpose of this document is to introduce you to the features and functionality of the Order Management Bookings tool. This document is designed for new Shippers.

What is Order Management Bookings?

Order Management Bookings (OMB) is a web-based order/item booking tool used to create and manage shipper or manufacturer bookings. With customer specific booking rules and configurations, the customer has greater visibility and control over these bookings. OMB also includes communication tools to allow messaging between importers, shippers, manufacturers, and Expeditors contacts.

Accessing OMB

Production Site: <https://omb.expeditors.com/omb/Login.jsp>

Note: Every user needs to have a unique login. Using one login to run multiple sessions of OMB is no longer allowed. Please do not use someone else's login to access OMB.

Requirements to use OMB:

- Computer with Internet connection
- Web browser with Internet Explorer 7 or above

To log in to OMB:

OMB is a secure tool that requires you to log in before you can use any of its features.

1. Open a compatible Web browser and go to the OMB login page (use link above).
2. Enter your **user name** and **password** in the indicated fields.
3. Click **Log In**.

Forget Your Password and/or User Name?

If you forget your password and/or user name, please contact EDI Helpdesk (EDI.helpdesk@expeditors.com) and they will help you with your login.

Who to Contact if You Have Questions

If you have general questions or issues with OMB, please contact your Expeditors Account Manager.

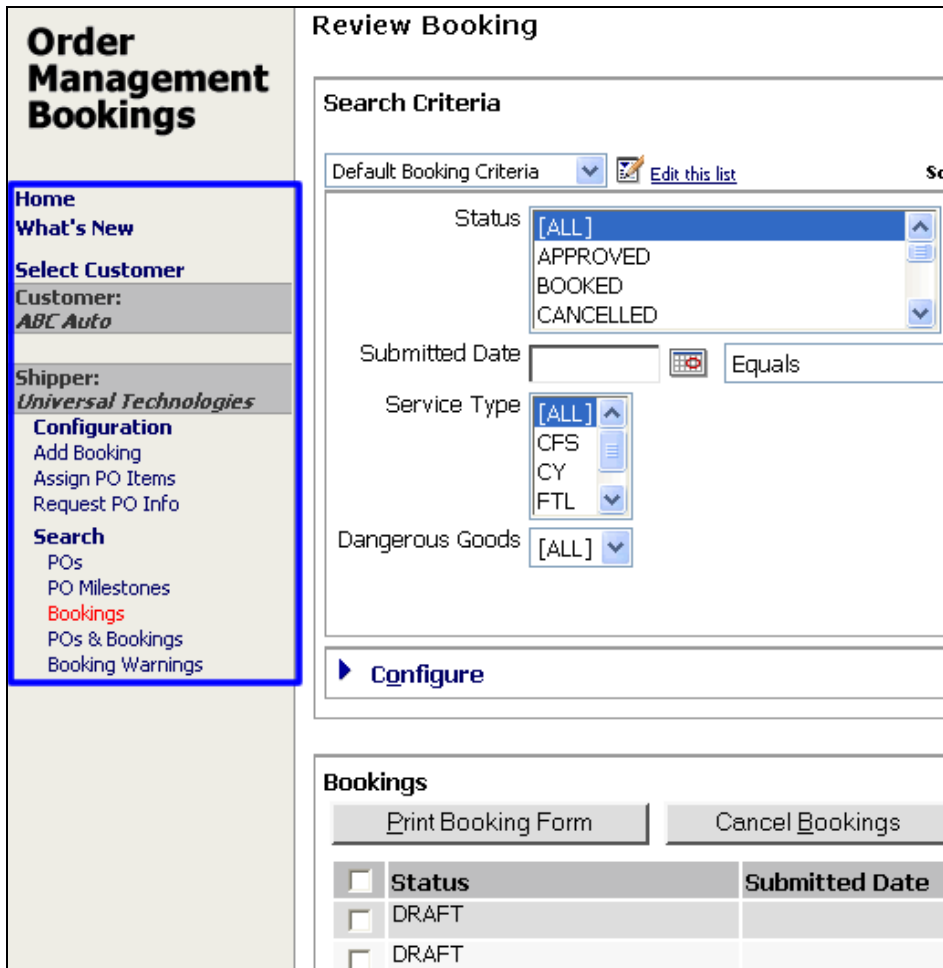
Navigation

After you log in, OMB will direct you to the main page. Use the left-navigation bar to navigate throughout the application.

The field in the upper right-hand corner allows you to enter the **Tracking Number** for a booking and when you click **Go**, will take you directly to the booking.



Shipper Main Page



Shipper Left Navigation Menu - Review Bookings Page

Configuring Your User Profile

Your preferences contain specific user profile information. You can update this information as necessary by clicking the **Preferences** link in the upper-right corner of the screen.

Note: Your preferences view may not contain the same fields and options as seen in the above image.

To review and update your Preferences:

1. Click the **Preferences** link in the upper-right corner.
2. Review your **User Profile** information and update as necessary.
 - Bolded and starred (*) fields are required.

Sponsoring Org.

Indicates the branch your Expeditors Account manager is located at.

Port

Indicates your default port. Click the glasses icon to use the Port look-up feature.

Filter Preference

Indicates the default mode (Basic or Custom) the system will use when returning results for bookings and POs. For example, the Basic filter mode requires you to manually filter the full list of results returned. The Custom mode allows you to set up a custom filter so the system always filters out certain bookings that are returned.

3. Click **Save** once you have made the desired updates.

Configuring Your Shipper Profile

If you're logged in as a **Shipper administrator**, you have the ability to configure your Shipper Profile. Your Shipper Profile contains detailed information about your company, such as the address and contact information.

The screenshot shows the 'Shipper Profile' configuration page. The left sidebar contains navigation links: Home, What's New, Select Customer (Customer: ABC Auto), Shipper (Universal Technologies), Configuration (Shipper Profile), My Manufacturers, Pickup Locations, Letters of Credit, Shipper Parties, Add Booking, Assign PO Items, Request PO Info, Search (POs, PO Milestones, Bookings, POs & Bookings, Booking Warnings). The main content area is titled 'Shipper Profile' and includes: Shipper ID: 22889, Shipper Name: Universal Technologies, Contact information (First Name: Speed, Last Name: Racer, *Email: christopher.cutler@expeditors.com, Telephone, Fax), Bill of Lading Type (Default BL Type dropdown, with a note: 'The FCR is not a title or transportation document therefore cannot be used to control release of cargo. The Express Bill of Lading is a non-negotiable document and cannot control release of cargo.'), Alerts (*Receive Order Alerts: Yes/No radio buttons, Daily summary of Milestone and PO Acknowledgment activities: Attach a detail report checkbox, When: Morning dropdown, Time Zone: United States dropdown, (GMT -07:00) Los Angeles dropdown), and Addresses (Address 1, Address 2, City, State/Province, Postal Code, Country: United States dropdown). Save and Cancel buttons are at the bottom right.

Figure 1: Shipper Profile

To configure your Shipper profile:

- Click the **Configuration** link in the left navigation bar, then click the **Shipper Profile** link. Make sure to click **Save** after making any changes to your Shipper Profile information.

Shipper Profile Fields and Options

Shipper ID: indicates your Shipper ID as set up by your Expeditors Account Manager. You are unable to edit this field.

Shipper Name: indicates the name of your organization. You can edit the name as necessary. This is a required field so the field cannot be left blank.

Contact Section

The Contact section displays the contact information for who in your company should receive emails and notifications. Multiple email addresses can be entered separated by commas (.). Enter any special notes for contact information as necessary.

Bill of Lading Type Section

Default BL Type: If you want to set a default bill of lading type, you can choose from:

- Original BL to consignee & FCR to shipper
- Express BL to consignee & FCR to shipper
- Original BL to shipper & NO FCR
- Express BL to shipper/consignee & NO FCR

The **Last Modified** date, time, and user ID of the field will be shown.

Alerts Section

- **Receive Order Alerts:** You can click **Yes** to activate the Receive Order Alerts option, which will enable you to receive an email from the system when an order has been updated in the system, for example, when the customer updates the quantity on a PO.
- **Schedule for Daily summary of PO Acknowledgement activities:** Select **When** you want the summary of PO acknowledgement information sent to you, and your **Time Zone**.
- **Attach a detail report:** Select this check box to have an Excel spreadsheet attached with details to your summary email.

Address Section

The Address section displays the address and time zone information about your company. Update these fields as necessary.

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- Created by: Expeditors Technical Communications Department -

Adding Pickup Locations

You have the ability to add pickup locations if you're logged in as a **Shipper Administrator**. The pickup locations you enter here will be available when on the "Pickup/Delivery" tab for a booking.

The screenshot shows the 'Pickup Locations' page in a web application. The left sidebar contains navigation links for 'Order Management Bookings', 'Home', 'What's New', 'Select Customer', 'Customer: ABC Auto', 'Shipper: Universal Technologies', 'Configuration' (with sub-links for Shipper Profile, Marks & Numbers Template, Pickup Locations, and Letters of Credit), 'Shipper Parties', 'Add Booking', and 'Request PO Info'. The main content area has a title 'Pickup Locations' and a breadcrumb 'Pickup Locations > Details'. It features a form with the following elements: a 'Booking Number' field with a 'Go' button, 'Preferences' and 'Help' links, and a 'Log out: qae-ebcshipperadmin' link. The form includes fields for '*Pickup Location ID:' and '*Pickup Location Name:', a 'Status: Active' dropdown, and a 'Set as Default' checkbox. Below these are two tabs: 'Address' (selected) and 'Contact'. The 'Address' tab contains fields for 'Address:', 'City:', 'State/Prov:', 'Postal Code:', and 'Country:'. The 'Country' field has a dropdown menu currently showing 'ACT-Central Standard Time (Northern Territory)'. At the bottom right of the form are 'Save' and 'Cancel' buttons.

Figure 1: Shipper - Pickup Locations Page

To Add a Pickup Location:

- 1 From the left navigation menu, click **Configuration**, then **Pickup Locations**. Click **Add**.
- 2 Enter information for the **Pickup Location ID** and **Name**.
The **ID** can be any combination of numbers or characters.
The **Name** should be a relevant name for the location. The name you enter here will be displayed on the printed booking form.
- 3 Enter **Address** information and **Contact** information.
Enter the contact information for someone at the pickup location.
- 4 Click **Save** once completed.
Notice your new Pickup Location will be visible on the Pickup page.

Adding Letters of Credit

You have the ability to add letters of credit and set them as active or inactive if you're logged in as a **Shipper Administrator**. The letters of credit you enter here will show up in the lookup for the **Letters of Credit Number** field in the [Booking Request](#) tab of a booking.

Figure 1: Shipper - Letters of Credit Page

To add letters of credit:

- 1 From the left navigation menu, click **Configuration**, then **Letters of Credit**. Click **Add**.
- 2 Enter the **LC Number** and a description for the letter of credit.
- 3 To set the letter of credit as the default value that will appear in the **Letter of Credit Number** field in the [Booking Request](#) tab of a booking, select the **Set as default** check box.
- 4 To change the **Status** of a letter of credit, select **Active** or **InActive** from the drop-down list. Inactive letters of credit will not appear in the lookup.
- 5 Click **Save** when you are finished. The added letter of credit will appear when shippers use the lookup feature for the **Letter of Credit Number** field in the [Booking Request](#) tab of a booking. To edit a letter of credit, click the row of the letter of credit you want to edit.

Adding Bookings


If you're logged in as a **Shipper**, the process for adding a new booking requires you to add information on a series of tabs, discussed in detail below. To start adding a new booking, click **Add Booking** from the left navigation bar. The links highlighted below are the tabs you will complete in order to create a booking.

You can also add a new booking by copying an existing booking. See [Copy a Booking](#) for more information.



Figure 1: Shipper Add Bookings - Purchase Order Tab

Saving Your Progress

Order Management Bookings will automatically save your progress each time you go to a different tab. You can also click the **Save** icon ( [Save](#)) as necessary. Save your progress before logging out of the system.

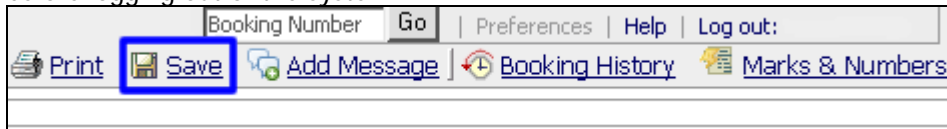


Figure 2: Save Link


Purchase Order Tab

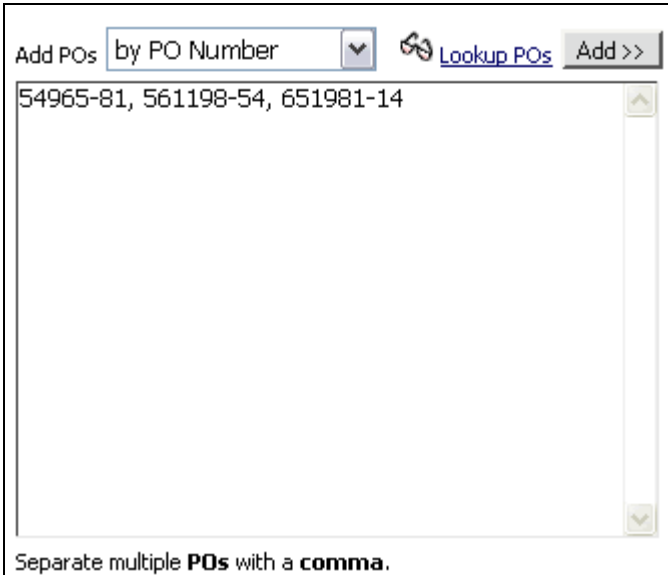
This is where you choose which POs you want to book. You can use **Lookup POs** to find all the POs that are available for booking. POs that are not longer available can be found using the [POs search](#).

To add POs to the booking:

- 1 Select how you want to add POs by selecting from the drop-down list. To add POs directly, select **by PO Number**. If you want to add POs by finding all POs with the same item, select **by Item ID**.
- 2 Depending on what you chose in step 1, enter the PO number or Item IDs. You can

copy and paste multiple POs numbers or Item IDs as long as you separate them with a comma. Click **Add** to add the POs to the booking.

 **Note:** If a PO number has more than one issue date, only the most recent PO will be added here. If you want to use the PO with an older issue date, the **Lookup POs** must be used (step 3).



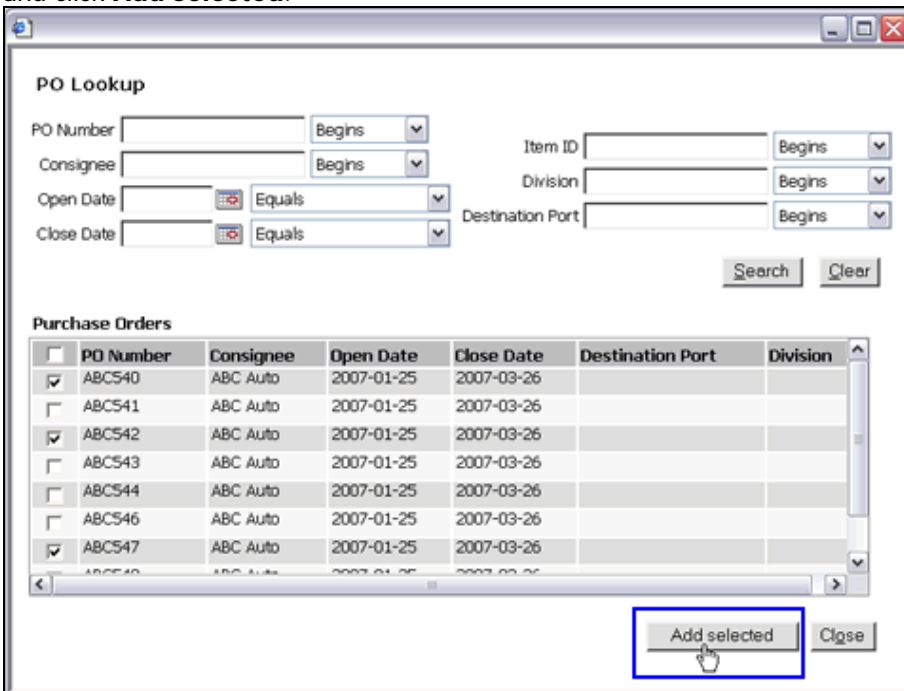
Add POs by PO Number Lookup POs Add >>

54965-81, 561198-54, 651981-14

Separate multiple **POs** with a **comma**.

Figure 3: Enter PO Numbers or Item IDs

- 3 If you don't know the PO Number, click **Lookup POs** to open a pop-up window where you can search for PO numbers. Select the checkbox next to the PO numbers you want and click **Add selected**.



PO Lookup

PO Number Begins ▼ Item ID Begins ▼
 Consignee Begins ▼ Division Begins ▼
 Open Date Equals ▼ Destination Port Begins ▼
 Close Date Equals ▼

Search Clear

Purchase Orders

<input type="checkbox"/>	PO Number	Consignee	Open Date	Close Date	Destination Port	Division
<input checked="" type="checkbox"/>	ABC540	ABC Auto	2007-01-25	2007-03-26		
<input type="checkbox"/>	ABC541	ABC Auto	2007-01-25	2007-03-26		
<input checked="" type="checkbox"/>	ABC542	ABC Auto	2007-01-25	2007-03-26		
<input type="checkbox"/>	ABC543	ABC Auto	2007-01-25	2007-03-26		
<input type="checkbox"/>	ABC544	ABC Auto	2007-01-25	2007-03-26		
<input type="checkbox"/>	ABC546	ABC Auto	2007-01-25	2007-03-26		
<input checked="" type="checkbox"/>	ABC547	ABC Auto	2007-01-25	2007-03-26		

Add selected Close

Figure 4: Lookup PO Pop-up Window

- 4 The POs will show up in field. If you want to remove POs, select the checkbox next to the PO you want to remove and click **Remove selected**. Click **Next** when you are finished to move on to the Items tab.

<input type="checkbox"/> Remove selected		<input type="checkbox"/> Remove all		
<input type="checkbox"/>	PO Number	Open Date	Close Date	Consignee
<input type="checkbox"/>	ABC540	2007-01-25	2007-03-26	ABC Auto
<input type="checkbox"/>	ABC542	2007-01-25	2007-03-26	ABC Auto
<input type="checkbox"/>	ABC547	2007-01-25	2007-03-26	ABC Auto

Figure 5: Selected POs

Items Tab

The items from the POs you selected in the **Purchase Order** tab will appear here. You can fill in the **Pieces to be Booked** field as necessary.



Tip: You can also update the information by downloading a spreadsheet from the **Purchase Order** tab and then uploading the spreadsheet to update the booking. See Upload Items on a Booking for more information.

To remove items, unselect the check box next to the item. Click **Next** to continue to the **Booking Request** tab.



Note: If your consignee has enabled the auto fill line items feature, you would not need to fill in the fields on this tab.

PO	Division (PO)	Item ID	Shipper Item ID	Description	Pieces Ordered	Pieces Remaining	Pieces Booked	Piece Unit	Pieces/Case Ordered	Pieces/Case Booked	Pieces/Case Unit	Car Ori
PO100410000	SUFFOLK VIRTUAL	CL376-Q		OEM Replacement Diff	300	300		EA	10		CTN	30
PO100410000	SUFFOLK VIRTUAL	CL404-Q		Locking Differential	400	400		EA	10		CTN	40
PO100410000	SUFFOLK VIRTUAL	CL409-Q		Full Synthetic Oil	500	500		EA	10		CTN	50

Figure 6: Items Tab

Booking Request Tab

The Booking Request tab contains three sections:

- **Order Summary** - Provides an overview of the information you entered on the Items tab. You can click the column headers to sort.
- **Booking Details** - Allows you to enter general booking information. [See below for more details.](#)
- **Attach/Generate Documents** - Upload any booking and shipment-related documents as necessary. [See below for more details.](#)

BCA10394 - Shipr: Universal Technologies [DRAFT] Booking Number Go | Preferences | Help | Log out qae-ebcsysadmin

Purchase Order | Items | **Booking Request** Print | Save | Add Message | Booking History | Marks & Numbers

Order Summary

PO Number	Open Date (PO)	Close Date (PO)	Terms	Pieces Ordered	Pieces Booked	Cases Ordered	Cases Booked	Volume Ordered	Volume Booked	Weight Ordered	Weight Booked
PO051911002	2007-08-05	2011-08-11	1500	1500		150		19.525		1500.000	
PO051911011	2007-08-05	2011-08-11	1500			150		19.525		1500.000	
YW031110001	2007-08-05	2011-08-11	1500			150		19.525		1500.000	

Booking Details

*Shipper: Universal Technologies

*Consignee: ABC Auto

Agent (Notify Party):

Also Notify Party:

Shipper Reference:

*Booking Branch:

*Origin Port Code:

Dest. Port Code:

*Final Destination:

*Shipment Type: Ocean Total Weight: 0.000 (KG) *Total Volume: 0.000 (CBM)

*Service Type: CFS The PCR is not a title or transportation document therefore cannot be used to control release of cargo. The Express Bill of Lading is a non-negotiable document and cannot control release of cargo.

*BL Type:

*Delivery Method: Exporter Delivery

*Date Freight Available: *Time:

ISF Parties

*ISF Parties may be required for shipments if Origin is outside of the United States and Puerto Rico and the Final Destination is in the United States or Puerto Rico.

Manufacturer:

*Goods Description: [Show Routing Request](#)

*Dangerous Goods:

*Does this shipment contain solid wood packing materials?:

Letter of Credit Number:

Special Instructions/ Equipment Request:

Documents

Fields required for generating or attaching documents are displayed with an asterisk ().

Generate (using current booking data):

Commercial Invoice Packing List Packing List

*Commercial Invoice #:

Packing List #:

*Currency:

*Incoterms:

*Country of Origin:

Additional Charges:

Attach

Document Type*:

Description:

Maximum of a 5 MB file size per document

Type of files allowed:
BMP PDF
JPG TXT
GIF XLS
TIF DOC

Source	Document Type	Description/Reference#	Download	Created By	Create Date	Routing Status	
<input type="checkbox"/>	Attached	Commercial Invoice	Q1	Invoice.txt	qae-ebcsysadmin	2013-09-17 22:14	Awaiting delivery to edoc 2013-09-17 22:14

Figure 7: Booking Request Tab

Booking Details


- Bold and starred fields are required.
- Click the lookup icons () next to a field to search.
- For the **Final Destination** lookup, the destinations are taken directly from the **Final Destination** tab set up in the Customer's Profile.
- If the **Delivery Method** is an **Expeditors Pickup**, you need to supply a pickup location that has been saved in the system. Click the lookup icon () to choose from a list of available pickups.
- For the **ISF Parties** section, depending on the **Service Type** selected, you can select the **Consolidator**, **Manufacturer**, and **Stuffing Location** for the booking. Parties are taken directly from the Shipper or Manufacturer Parties.
- Click **Show Routing Request** ([Show Routing Request](#)) to expand the routing request fields. Enter in specific instructions about the routing for the booking

operator to use when they are booking with the carrier. This section will remain open once you enter in information.

- For the **Letter of Credit Number** lookup, the numbers are taken directly from the letters of credit added by your shipper admin. See [Adding Letters of Credit](#) for more information.

Attach/Generate Documents

To Generate Documents:

1. Select the check box next to the documents you want to generate.
2. Enter the **Commercial Invoice #** (required even if you're only generating a Packing List), **Currency**, select the **IncoTerms**, and enter the **Country of Origin**. You can click the lookup icon () to search for a country.
3. Click **Generate**.
4. The generated documents will appear. If you make a change to the booking, you will need to re-generate the documents if you want the documents to have the most up to date information. Click **Generate** to re-generate the documents and update the documents with the new information in the booking.

To Attach Documents:



Caution: Please make sure the file you are trying to upload is no more than 10 MB in size or it will not upload to OMB properly.

1. Select the **Document Type** of the document you want to upload from the drop-down list. If the document type is not listed or there are no options, contact your local EI branch to have them add the document type.
2. Enter a **Document Description**.
3. Click **Browse** to locate the file on your computer.
4. Click **Attach File** to upload the document.
5. The uploaded file will appear. To delete documents, select the check box next to the document you want to delete and click **Delete**.



Note: Depending on the file size and your Internet connection speed, the file may take a moment to upload.

Booking Confirmation Tab

The Booking Confirmation tab will not appear when the booking is in draft or cancelled state.

The Booking Confirmation tab shows the booking number and allows the shipment routing information and other booking information to automatically populate. This will show up after you **Submit** the booking. If no information is present yet after you submit the booking, click **Refresh** and wait for the information to be processed.

The **EI Booking No.** and **Vessel Name** fields and **Importer Security Filing** (ISF) section will only appear for Ocean bookings.

BCA00153 - Shpr: ISF DEMO Vendor B [BOOKED]

Purchase Order | Items | Booking Request | **Booking Confirmation** | Warnings

Print Refresh Add Message Booking History

Shipment

EI Shipment No.: 591000053
 EI Booking No.: S394287681
 Carrier Code: OCLU
 Carrier Booking No.: YH19989
 Vessel Name: COOL VESSEL
 Flight/Voyage No.: 00023
 CFS Cutoff Date: SHA 10/15/2008 15:00
 CY Cutoff Date:
 Freight Received Date: SHA 10/16/2008
 Current Est. Departure Date: SHA 10/23/2008
 Current Est. Arrival Date: LAX 10/23/2008 original date: 10/18/2008
 Confirmed On Board Date: SHA 10/23/2008

PO	Orhand No.
2000303	F394584152

These are estimated shipping details until the freight is Confirmed On Board.

Importer Security Filing

EI Booking No.: [S394287681](#)
 Filing Status: PENDING
 US Customs ISF No.:


<Back Next>

Exit Validate Approve Reject Cancel Booking Mark as Pending

Figure 8: Booking Confirmation Tab

Process for Filing an Importer Security Filing (ISF):

- 1 Create and submit a booking.
- 2 Once the booking has been approved and Expeditors has worked with it, the filing will show up in the ISF application.

 **Tip:** You can check to see if the ISF has been initiated for your booking by configuring your [Bookings](#) search to include the **Expeditors ISF Ref. No.** and/or **Filing Status**.


See [Using the Custom Filter](#) for more information on configuring searches.

- 3 The **Booking Confirmation** Tab of the booking will display the **Importer Security Filing** section.

Shipment	
EI Shipment No.:	591000053
EI Booking No.:	S394287681
Carrier Code:	OOLU
Carrier Booking No.:	YHY9989
Vessel Name:	COOL VESSEL
Flight/Voyage No.:	00023
CFS Cutoff Date:	SHA 10/15/2008 15:00
CY Cutoff Date:	
Freight Received Date:	SHA 10/16/2008
Current Est. Departure Date:	SHA 10/23/2008
Current Est. Arrival Date:	LAX 10/23/2008 original date: 10/18/2008
Confirmed On Board Date:	SHA 10/23/2008
These are estimated shipping	
Importer Security Filing	
EI Booking No.:	S394287681
Filing Status:	PENDING
US Customs ISF No.:	

Figure 9: Booking Confirmation Tab - Importer Security Filing Section

- Click the Expeditors ISF Ref. No. link to go directly to the exp.o ISF application and fill out the ISF information.

 **Note:** You must have ISF permission in order to view the ISF for the booking.

- Once the United States Customs and Border Protection (CBP) has received the completed ISF, the US Customs ISF No. will be shown.

Importer Security Filing	
EI Booking No.:	S394287681
Filing Status:	PENDING
US Customs ISF No.:	CBP000123

Figure 10: US Customs ISF No. Filled In

Expeditors ISF Ref. No. - Expeditors will use this number to keep track of the shipment's ISF. You can click this number to go directly to Expeditors ISF application.

Filing Status - This is the status of the shipment's ISF. Statuses include:

- **Not Ready** - The booking has not been filled out with valid data yet. At least one required element is missing or invalid.
- **Ready** - All the data is completed and valid, but the booking's ISF has not yet been submitted to Customs.
- **Accepted** - The ISF has been submitted and accepted by Customs.
- **Deleted** - The ISF was submitted to Customs, but was subsequently deleted.
- **Expired** - The ISF was submitted to Customs, but a match could not be made between the bill of lading and an AMS filing, so Customs expired the ISF.

US Customs ISF No. - CBP creates this number and uses it to keep track of the

shipment's ISF. Use this number when communicating with CBP about the ISF.

Warnings Tab

Booking Rule	Submitted	Description	Reference	Messages	Status
All Bookings	5 May 2009 17:15:41 GMT	All bookings require approval.		Add Message	No Action Taken
Booked via OCEAN	5 May 2009 17:15:41 GMT	All bookings with Shipment Type of OCEAN require approval.		Add Message	No Action Taken
Item Quantity Under-booked	5 May 2009 17:15:41 GMT	Item ID 10047-645-041 on PO CC01260901: The booked quantity of 10 pieces is more than 50% below the pieces ordered and requires approval.	Item ID 10047-645-041 on PO CC01260901	05/05/2009 qaе-ebccustadmin: Please ship all items. View/Reply	No Action Taken

Figure 11: Warnings Tab

The Warnings tab will appear after the booking is submitted and if there are any Booking Rules that require the booking to be approved by the customer.

Click **Add Message** on any of the booking rule warnings to add a message directly into the **Messages** column. The message will also appear in the **Booking Events** page.

Booking Rule	Submitted	Description	Reference	Messages	Status
All Bookings	5 May 2009 17:15:41 GMT	All bookings require approval.		Add Message	Approve
Booked via OCEAN	5 May 2009 17:15:41 GMT	All bookings with Shipment Type of OCEAN require approval.		Add Message	Approve
Item Quantity Under-booked	5 May 2009 17:15:41 GMT	Item ID 10047-645-041 on PO CC01260901: The booked quantity of 10 pieces is more than 50% below the pieces ordered and requires approval.	Item ID 10047-645-041 on PO CC01260901	05/05/2009 qaе-ebccustadmin: Please ship all items. View/Reply	Reject

Figure 12: Add Message to Booking Rule Warning

If you are a customer, you can select the drop-down list in the **Status** column to **Approve** or **Reject** the warning. See [Reviewing Bookings - Processing the Warnings Tab](#) for more information.

Tracking Number

BCA01204 - The system will automatically assign a tracking number to the booking you're creating. If you need to exit the system and complete the booking at a later time, you can use the tracking number to locate your booking.

Mfr: Tires & Traction - If the manufacturer created the booking, "Mfr" will be displayed along with the name of the manufacturer. If the shipper created the booking, "Shpr" will be displayed along with the name of the shipper.

[DRAFT] - When you change the status of the booking, it will automatically display the status (in blue) next to the tracking number.

BCA01204 - Mfr: Tires & Traction [DRAFT]

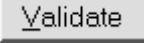
[Purchase Order](#) | [Items](#) | [Booking Request](#)

Add POs by PO Number [Lookup POs](#)

Enter PO numbers or Item IDs here, separate e


Figure 13: Tracking Number, Who Created the Booking (Mfr or Shpr), and Status of Booking

Validating Your Booking

There is a **Validate** button () available on the bottom of each page when in the process for creating a booking. Click **Validate** at any time to have the system validate the Booking. When a Booking is validated, the system checks to see if the information entered meet the required business rules for a complete booking.

For example, the system will check to make sure all the required fields have been filled in. If the system finds required fields that are blank or invalid, they will be indicated in a yellow box at the top of the page.

Printed Booking Form

Once you have completed your booking you can create a Printed Booking Form by clicking the **Print** ( [Print](#)) link in the upper-left corner. The printed booking form will be a PDF document. Print the booking for your records if necessary.

Address and contact information that appears on the printed booking form can be updated by going to your Profile and changing the necessary fields on the Address and Contact tab.



Note: You will need Adobe® Reader® installed on your computer to view the printed booking form. Go to the [Adobe web site](#) to download the free reader.

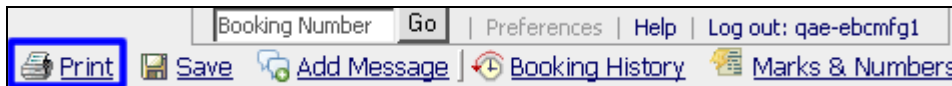


Figure 14: Print Booking Link

Add Message

Customers, Shippers, and Expeditors can click **Add Message** to exchange notes back and forth on a booking.

Each message can be up to 2000 characters. Once you post a message, it cannot be edited or deleted. You can view the messages by clicking [Booking Events](#).

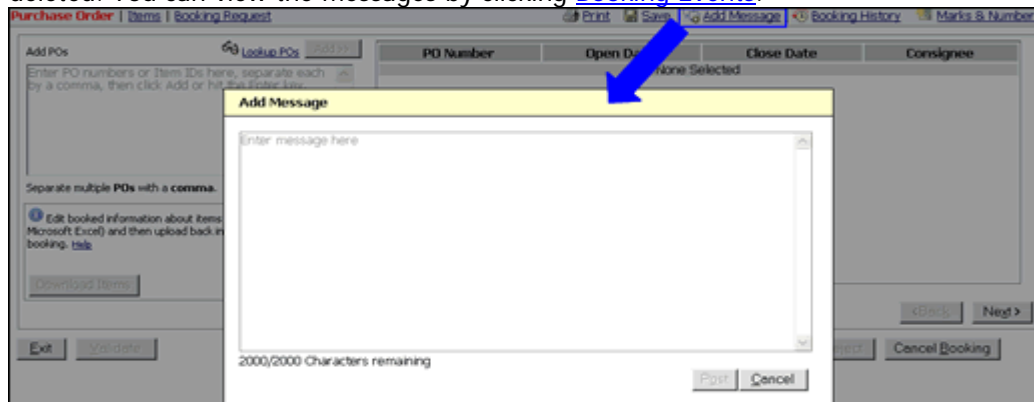



Figure 15: Add Message

You can search for specific messages by adding the **Last Message**, **Last Message Date**, or **Last Message by** fields to a [Custom Filter](#) on any of the searches.

Booking History

Click the **Booking History** ( [Booking History](#)) link to open a pop-up window of events and messages for the booking. The events are system-generated and provide a history of actions performed on the booking. Messages are added using the **Add Message** link or through the **Warnings** tab.

If a booking has been reopened, a **Generate Booking Spreadsheet** link will appear allowing you to create and download a spreadsheet that compares the changes made between versions of the booking. Changes are shown in the spreadsheet in **Red**.



Booking History - Windows Internet Explorer provided by Expeditors International

Booking: BG000382

Action	When	Note
APPROVED	04/26/2012 22:28 GMT	qae-ebcsysadmin : Approve
Transmitted to Expeditors Branch	04/26/2012 22:28 GMT	Transmitted to HKG
PENDING EXPEDITORS ACTION	04/26/2012 22:28 GMT	Submitted by qae-ebcsysadmin
REOPENED	04/26/2012 22:24 GMT	qae-ebcsysadmin
REJECTED	04/26/2012 22:24 GMT	qae-ebcsysadmin : Reject
APPROVED	04/26/2012 22:23 GMT	qae-ebcsysadmin : again
Transmitted to Expeditors Branch	04/26/2012 22:22 GMT	Transmitted to HKG
PENDING EXPEDITORS ACTION	04/26/2012 22:22 GMT	Submitted by qae-ebcsysadmin
REOPENED	04/26/2012 22:21 GMT	qae-ebcsysadmin
REJECTED	04/26/2012 22:18 GMT	qae-ebcsysadmin : Reject

Figure 16: Booking History Pop-up Window



Booking History - Windows Internet Explorer provided by Expeditors International

Booking: BG001305

Action	When	Note
Transmitted to Expeditors Branch	08/01/2012 21:27 GMT	Transmitted to HKG
REOPENED	08/01/2012 21:27 GMT	qae-ebcsysadmin: Update Required
PENDING EXPEDITORS ACTION	08/01/2012 21:27 GMT	Submitted by qae-ebcsysadmin Generate Booking Spreadsheet
CREATED	08/01/2012 21:21 GMT	qae-ebcsysadmin

Figure 17: Generate Booking Spreadsheet

	A	B	C	D	E
1	BG001305 - Version #3				
2	Status at the time of submission: PENDING EXPEDITORS ACTION				
3	Customer: ABC Auto				
4	Shipper: James Sporting Goods				
5	Submitted by: qae-ebcshipperadmin on 01-Aug-2012 21:36 GMT				
6	Booking Details		Current		Previous (if changed)
7	Shipper	James Sporting Goods			
8					
9					
10		United States			
11	Consignee	ABC Auto			
12					
13					
14					
15	Booking Branch	HKG			
16	Origin Port Code	LAX		HKG	
17	Final Destination	LAX Test Final Dest			
18	Shipment Type	OCEAN			
19	Service Type	CY		CFS	
20	BL Type	Express BL to consignee FCR to shipper			
21	Delivery Method	[Blank]		EXPORTER_DELIVERY	
22	Date Freight Available	08/14/2012 11:45			
23	Total Weight (KG)	49.500			
24	Total Volume (CBM)	16.500			
25	Containers	Quantity	Type	[Blank]	
26		2	40's		
27	Goods		Current		Previous (if changed)
28	Goods Description	Change to Goods Description			
29	Dangerous Goods	YES			
30	Wood Packing Materials	NO		YES	
31	Special Instructions/ Equipment Request	Change to Special Instructions/ Equipment Request			

Figure 18: Sample Booking Spreadsheet

Marks & Numbers

Click the **Marks & Numbers** ( [Marks & Numbers](#)) link to expand or hide the section for generating Marks & Numbers.

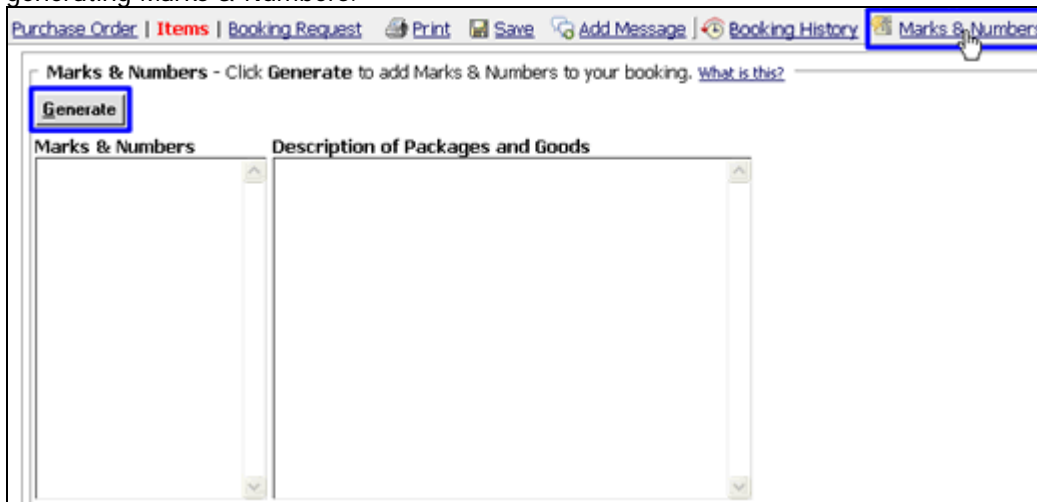


Figure 19: Marks & Numbers Expanded

When you click **Generate**, the **Marks & Numbers** and **Description of Packages and Goods** sections will populate with information gathered from your booking. The format is determined by the Customer Marks & Numbers template or Shipper Marks & Numbers template.

You can click **Generate** at any point before submitting the booking. Every time you click the **Generate** button, all of the information in the **Marks & Numbers** and **Description of Packages and Goods** sections will be overwritten with the most up to date information. Any changes you made in these sections will be lost.

A checkmark (✓) will appear on the **Marks & Numbers** icon to show that Marks & Numbers has been generated for this booking.


The Marks & Numbers will appear on the [printed booking form](#):

MARKS & NUMBERS	DESCRIPTION OF PACKAGES AND GOODS
Booking Branch: EXPEDITORS INTL-LAX 12200 Wilkie Avenue Suite 300 Hawthorne, California United States	This package is for consignee1.
Consignee: Consignee1	For Item: 10031-430-022/000003 Description: X Gear sb1 c10/c11 Close date: 09/27/2007 Piece ordered: 200
Dangerous Good? NO	For Item: 10031-430-023/000004 Description: X Gear sb1 c12/c13 Close date: 09/27/2007 Piece ordered: 180
Goods Description: Blue shoes size 7	Special Instructions:

Figure 20: Page 2 of Printed Booking Form - Marks & Numbers

See Marks & Numbers for more information.

Bookings

 **Tip:** To narrow your search results and view only the information that you are interested in, enter as much search criteria as you can before you click **Search**.
By filtering your search results, the results will return faster and be more likely to include all the information you requested.
See Best Practices for more details.

From the Review Bookings page, you can click a Booking to view information about the PO, Items, Pickup/Delivery, etc.

You can view multiple booking details at a time without having to perform another search or return to the **Review Bookings** page.

To view multiple booking details:

- 1 Select the check boxes next to the bookings you want to view details of and click **View Selected Only**.

Review Booking

Booking Number: Begins ▼

Create Time: ▼

Status: [ALL]
REJECTED
DRAFT
PENDING CUSTOMER ACTION

▶ **Advanced**

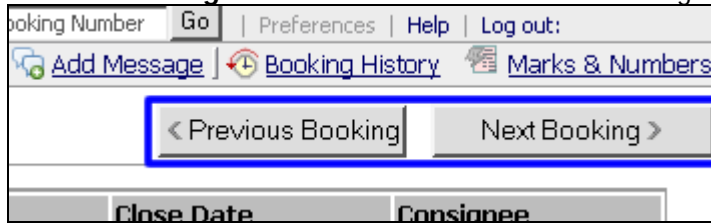
Bookings

▼

	Booking Number	Shipper Name (BK)	Manufacturer (BK)	Status	Submitted Date	Consign
<input type="checkbox"/>	BCB13828	Universal Technologies	Tires & Traction	DRAFT		
<input type="checkbox"/>	BCB13827	Universal Technologies		DRAFT		
<input checked="" type="checkbox"/>	BCB13757	Universal Technologies		DRAFT		ABC Au
<input checked="" type="checkbox"/>	BCB13744	Universal Technologies		APPROVED	08/19/2011 22:37	ABC Au
<input checked="" type="checkbox"/>	BCA12162	Universal Technologies		DRAFT		ABC Au

View Selected Only Button

- 2 You will be taken to the first booking you selected. You can click **Previous Booking** or **Next Booking** to view the details of the other bookings you selected.



Previous and Next Booking Buttons

Booking Status Details

- **Rejected:** Indicates bookings that are rejected by customer that were previously pending.
- **Draft:** Indicates in-process bookings that are still being worked on by the shipper, and they haven't been submitted to the customer.
- **Pending Customer Action:** Indicates bookings that need action by the Customer.
- **Pending Expeditors Action:** Indicates bookings that need action by Expeditors.
- **Pending Manufacturer Action:** Indicates bookings that need action by the Manufacturer.
- **Pending Shipper Action:** Indicates bookings that need action by the Shipper.
- **Requested:** Indicates bookings that are sent to Expeditors that did not need any approval and have not yet been booked by Expeditors. The Expeditors employee would enter necessary details to move the booking to a status of booked.
- **Approved:** Indicates bookings that have been approved by the Customer.
- **Booked:** Indicates Expeditors employee has entered necessary information for booking.
- **Received:** Indicates when the Freight has been received (FRT event). Shippers cannot re-open the booking as a draft to make changes.
- **Cancelled:** Indicates bookings that were previously requested.

Copy a Booking


You can create a new booking by copying an existing booking. The existing booking can have any status.


All of the information in the **Booking Details** section of the [Booking Request tab](#) will be copied except for:

- **Total Weight**
- **Total Volume**
- **Consignee**

Also, no POs or Documents will be copied.

To copy a booking:

- 1 Search for the booking you want to copy. You can use the [Bookings](#), [POs & Bookings](#), or [Booking Warnings](#) searches.
- 2 Click the Copy icon ( [Copy](#)) next to the booking you want to copy.

 **Note:** If you are a shipper, you cannot copy the bookings that were created by manufacturers.






Bookings			
Print Booking Form		Cancel Bookings	
<input type="checkbox"/>	Tracking Number	Shipper Name (BK)	Status
<input type="checkbox"/>	BCA11375  Copy	Universal Technologies	DRAFT
<input type="checkbox"/>	BCA10393  Copy	Universal Technologies	DRAFT
<input type="checkbox"/>	BCA10352  Copy	Universal Technologies	DRAFT
<input type="checkbox"/>	BCA10351  Copy	Universal Technologies	PENDING CUSTOMER ACTION

Figure 1: Copy Icon

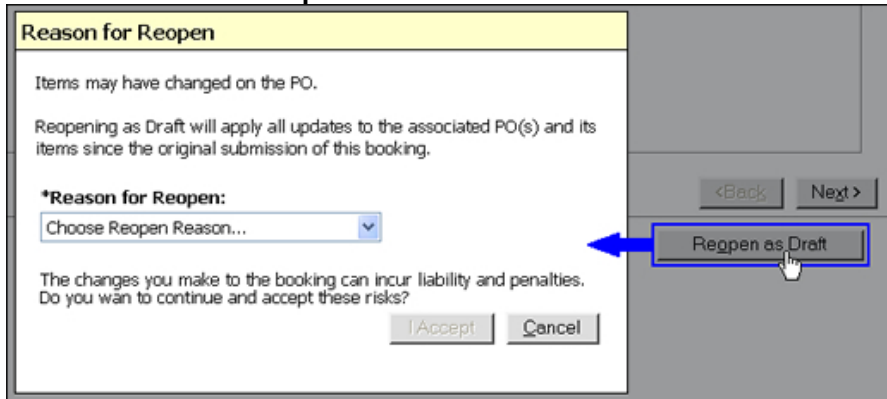
- 3 The new booking with the copied information will appear. [Add POs to the booking](#) and it will fill in the **Consignee**, **Total Weight**, and **Total Volume** based on the POs you enter.

 **Note:** POs and Documents are not copied over.

- 4 You can change any of the information as necessary and submit the booking when you're ready.

Updating a Booking

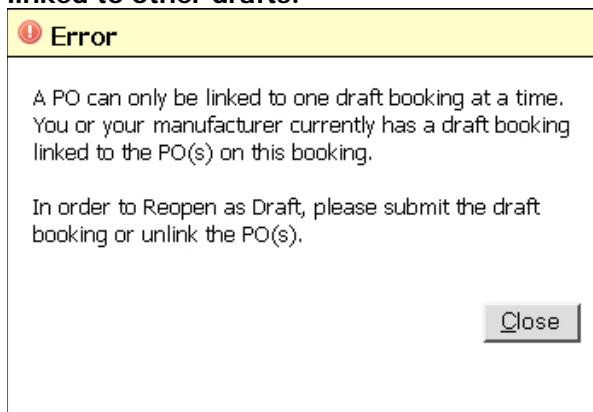
If you need to change a booking that **has already been submitted**, [find the booking](#) and click **Reopen as Draft**. You will need to select a **Reason for Reopen** from the drop-down list and then click **I Accept**.



The image shows a pop-up window titled "Reason for Reopen". The window has a yellow header bar. The main content area contains the following text: "Items may have changed on the PO.", "Reopening as Draft will apply all updates to the associated PO(s) and its items since the original submission of this booking.", and "*Reason for Reopen:" followed by a dropdown menu with the text "Choose Reopen Reason...". Below this is a warning: "The changes you make to the booking can incur liability and penalties. Do you want to continue and accept these risks?". At the bottom of the window are two buttons: "I Accept" and "Cancel". To the right of the window, there are two buttons: "<Back" and "Next >". A blue arrow points from the "Reopen as Draft" button to the dropdown menu.

Figure 1: Reason for Reopen Pop-up Window

If you receive the following warning, then your booking contains POs that are linked to other drafts:



The image shows an error message pop-up window with a yellow header bar containing a red exclamation mark icon and the word "Error". The main content area contains the following text: "A PO can only be linked to one draft booking at a time. You or your manufacturer currently has a draft booking linked to the PO(s) on this booking.", "In order to Reopen as Draft, please submit the draft booking or unlink the PO(s).", and a "Close" button at the bottom right.

Figure 2: Error


- 1 You need to find the bookings that contain the same POs that are linked to the booking you are trying to reopen. Once you have found the bookings you can either:
 - a. Submit those bookings**OR**
 - b. Remove the PO(s) from the booking you are trying to reopen.

You must complete step a. or b. before you can reopen the booking as a draft.

- 2 Once you successfully reopen the booking as a draft, you can make the necessary changes to the booking and resubmit it when finished.

POs

Click the **POs** link under the **Search** section of the left navigation to view a list of POs that have been created and sent to Expeditors. The list of POs is sorted by PO Number by default. All of the PO information will be read-only. When you view the [PO Details](#), you have the option of creating a PDF of the PO information that you can print or save.

 **Tip:** To narrow your search results and view only the information that you are interested in, enter as much search criteria as you can before you click **Search**.
By filtering your search results, the results will return faster and be more likely to include all the information you requested.
See Best Practices for more details.

Order Management Bookings

[Home](#)
[What's New](#)

Select Customer
Customer:
ABC Auto

Shipper:
Universal Technologies

Configuration
[Add Booking](#)
[Assign PO Items](#)
[Request PO Info](#)

Search
POs
[PO Milestones Bookings](#)
[POs & Bookings](#)
[Booking Warnings](#)

View Purchase Orders

PO Number Begins

Shipment Type
AIR
OCEAN
TRUCK

Origin Port Begins

Destination Port Begins

[Advanced](#)

Purchase Orders

Extract to...

PO Number	Consignee	Date Created
00576902	ABC Auto	
CC033110001	ABC Auto Test	2010-02-17
CC122910000	ABC Auto	2010-02-17

Figure 1: Shipper - Search>POs

PO Details

To view a PO's details:

- [Search for the PO](#), then click a PO to view the **PO Details** and **Line Items**.

If the customer has **PO Acknowledgement** enabled, you will see an **Acknowledgement** section, where the shipper or manufacturer can acknowledge the PO and discuss it (if discussion is enabled).

If the customer has **PO Milestones** enabled, you will see a **Milestones** section and be required to enter PO Milestone dates.

Purchase Order :CC041511000
[View PO Milestones](#) > [PO Details](#)

The milestones are in Pending Shipper Action because the PO is assigned to multiple manufacturers.

Open Date: 11/10/2011 **Shipper Name:** Universal Technologies
Close Date: 11/10/2011

[Show More Details](#) **A** **B** **C** **D**

Discussion

on 19-Apr-2011 20:05 GMT: PO was last updated on 19-Apr-2011 GMT, please **acknowledge**.
[View Discussion](#) **E**

Acknowledgement: Pending Shipper Action
 I **acknowledge** that I have reviewed this purchase order and will create a booking in the future to fulfill it.
 F

Milestones: Pending Shipper Action

Milestone Date Confirmation: PO was last updated on 19-Apr-2011 GMT, please confirm milestone dates or update accordingly.
 milestone estimated dates are accurate after reviewing the last PO update.

Materials are estimated to be **Ordered** on 08-Nov-2011.
 Complete on

Materials are estimated to be **Received** on 08-Nov-2011.
 Complete on

Production is estimated to be **Started** on 08-Nov-2011. **G**
 Complete on

Production is estimated to be **Finished** on 08-Nov-2011.
 Complete on

Quality Control is estimated to be **Started** on 08-Nov-2011.
 Complete on

Quality Control is estimated to be **Finished** on 08-Nov-2011.
 Complete on

Line Items **H**

Item ID	Shippers Item ID	Manufacturer	Description	Pieces Ordered	Piece Unit	Pieces/Case Ordered	Pieces/Case Unit	Cases Ordered
BL42350225		BL MANUFACTURING	Hana -STN	12	PRS	12	CTN	1
BL42350226		Mfq1	Hana -STN	54	PRS	12	CTN	2
BL42350227			Hana -STN	36	PRS	12	CTN	3

Figure 1: PO Details Page - Click a section for more information

- **A. Show More Details**
 Click to view all of the details of the PO.

Click [View Discussion](#) to view any messages on the PO.

Purchase Order: CC041511000		
Action	Date	Summary
Confirm Estimates Requested	19-Apr-2011 20:05 GMT	Milestone Date Confirmation: PO was last updated on 19-Apr-2011 GMT, please confirm milestone dates or update accordingly.
Acknowledgement (Order UPDATED)	19-Apr-2011 20:05 GMT	PO was last updated on 19-Apr-2011 GMT, please acknowledge .
Updated	19-Apr-2011 20:05 GMT	PO update received electronically
Confirm Estimates Requested	15-Apr-2011 15:47 GMT	Milestone Date Confirmation: PO was last updated on 15-Apr-2011 GMT, please confirm milestone dates or update accordingly.
Acknowledgement (Order UPDATED)	15-Apr-2011 15:47 GMT	PO was last updated on 15-Apr-2011 GMT, please acknowledge .
Items: Mfr Assigned	15-Apr-2011 15:47 GMT	qaa-christoc (Expeditors): Item BL42350226 assigned to Mfg1
Confirm Estimates Requested	15-Apr-2011 15:46 GMT	Milestone Date Confirmation: PO was last updated on 15-Apr-2011 GMT, please confirm milestone dates or update accordingly.
Acknowledgement (Order UPDATED)	15-Apr-2011 15:46 GMT	PO was last updated on 15-Apr-2011 GMT, please acknowledge .
Items: Mfr Assigned	15-Apr-2011 15:46 GMT	qaa-christoc (Expeditors): Item BL42350225 assigned to BLAH MANUFACTURING
Quality Control Finish Estimate Entered	15-Apr-2011 15:46 GMT	Quality Control is estimated to be Finished on 08-Nov-2011. Estimate defaulted based on the ship window.
Quality Control Start Estimate Entered	15-Apr-2011 15:46 GMT	Quality Control is estimated to be Started on 08-Nov-2011. Estimate defaulted based on the ship window.
Materials Received Estimate	15-Apr-2011	Materials are estimated to be Received on 08-Nov-2011. Estimate

Figure 4: PO History

- **E. View Discussion**

If the Customer allows Discussion on a PO, you can click **View Discussion** or **Discuss PO** to add any messages to the PO. Customers and Shippers can respond to a discussion at any time.

PO Milestone: Acknowledgement	
Discussion	
04-19-2011 20:05 GMT	PO was last updated on 19-Apr-2011 GMT, please acknowledge.
04-15-2011 15:47 GMT	PO was last updated on 15-Apr-2011 GMT, please acknowledge.
04-15-2011 15:46 GMT	PO was last updated on 15-Apr-2011 GMT, please acknowledge.


Figure 5: Discussion

- **F. Acknowledgement: [Pending Action]**

The **Acknowledgement** section will appear if the Customer requires acknowledgement of POs. OMB will send an email to the shipper reminding them to acknowledge a PO. The **Pending Action** displays who is responsible for performing an action at the moment.

Shippers have several ways of acknowledging the PO, they can either:

- Click the **Accept** button in OMB - this will notify the Customer that the shipper has reviewed the PO and has agreed to create a booking to fulfill it.
- Submit a booking that has the PO - this will automatically acknowledge the PO and is the same as if the **Accept** button was clicked.
- Assign the PO to a manufacturer - this action will notify the Customer that the shipper has reviewed the PO and assigned it to a Manufacturer to fulfill.

 **Note:** If a PO is **fully booked** and the Customer sends a PO update increasing quantities ordered or adding items, the Shipper will be required to re-acknowledge the PO.

However, If the PO update does **NOT** increase quantities ordered or add items, re-acknowledgement is not required.

• **G. Milestones: [Pending Action]**

The **Milestones** section will appear if the Customer requires PO Milestone dates to be entered. You will need to enter **Estimated** dates and also **Completed** dates.

Click **Add Estimates** to add the estimated PO Milestone dates. Enter the completed dates by clicking the calendar icon (📅) or entering the date in

MM/DD/YYYY format. Click the confirm button (✅) to update the completed date.

PO Milestone Summary emails will be sent when milestones require action. See PO Milestone Summary Emails for more information.

Figure 6 below shows the Milestones section when you view a PO Details for the first time and have not yet entered any estimates.

Note: Depending on the Customer's preferences, if there is a PO update, the Shipper will be required to confirm that the PO Milestone dates are still accurate.

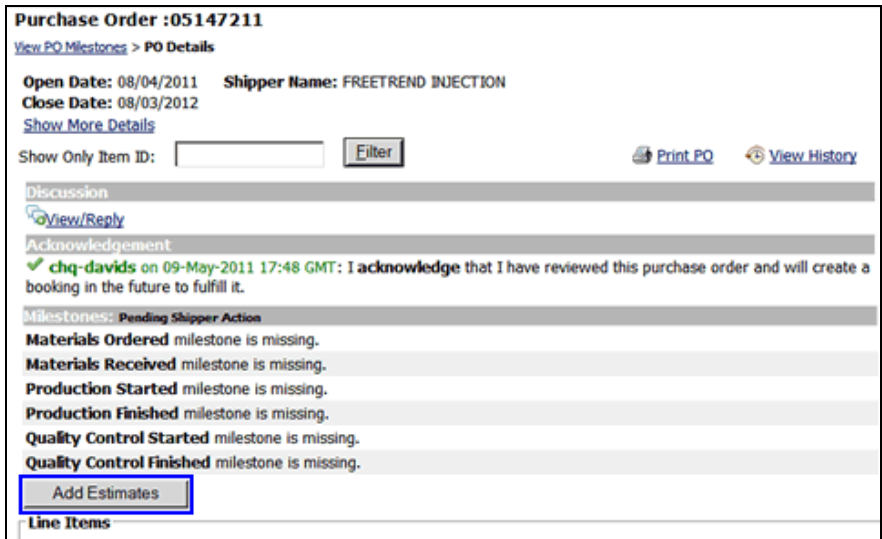


Figure 6: Milestones - Add Estimates

• **H. Line Items**

The **Line Items** section displays all of the line items on the PO and information about the items. If you want to display the Requested Delivery Date for each item, you must first add the **Req Delivery Close Date** and **Req Delivery Open Date** columns to this section. The customer can modify which columns are shown in the Customer Profile System Configuration tab.

Booking Warnings


Click the **Booking Warnings** link under the **Search** section of the left navigation to view all POs that contain warnings.

PO Num (BK)	Tracking Number (BK)	Status (BK)	E3 Booking Number (BK)	Warning Type (W)	Warning Description (W)	Warning Reference (W)	Warning Status (W)	Warning Date Submitted (W)	Warning Messages (W)	Status Updated By (W)	Status Updated Date (W)	Warning Condition (W)
8CA1117E	20R Container	PENDING CUSTOMER ACTION		All bookings require approval.		No Action Taken	01/19/2011 21:03			qwe-ibcshipperadmin	01/19/2011 21:03	Active

Figure 1: View Warnings - Shipper View

To use the Booking Warnings search:

- 1 Click **Booking Warnings** from the left navigation menu. Enter the search criteria and click **Search**. You can use the **Warning Condition** field to search warnings that are **Active** and require action.

 **Tip:** To narrow your search results and view only the information that you are interested in, enter as much search criteria as you can before you click **Search**.
By filtering your search results, the results will return faster and be more likely to include all the information you requested.
See Best Practices for more details.

- 2 You can save and configure your search criteria. See [Using the Custom Filter](#) for more information.
- 3 Click a row's **Tracking Number** to view the booking that the PO is booked on. If you want to add a message to the warning, click **Add Message** in the **Warning Messages** column.
- 4 You can select the **Extract to...** drop-down list and select **Excel** or **CSV** to extract all of the search results to the selected format.

Using the Custom Filter Feature

The Custom Filter feature is available for all searches.

This feature allows you to configure a search with customized criteria, save it, and then run it as needed. The Custom Filter feature also gives you the ability to add additional fields to the search criteria and add additional fields to view in the results.

The screenshot shows the 'Review Booking' interface with the following sections:

- Search Criteria:** Includes dropdowns for Status (ALL, APPROVED, BOOKED, CANCELLED), Submitted Date, Service Type (ALL, CFS, CY, FTL), Dangerous Goods (ALL), Consignee, Final Destination, Shipment Type (ALL, AIR, OCEAN, TRUCK), and Tracking Number. There are 'Search' and 'Clear' buttons.
- Configure:**
 - 1. Criteria Field Setup:** A table with columns 'Criteria Field' and 'Show?'. Fields include Status, Submitted Date, Service Type, Dangerous Goods, Consignee, Final Destination, Shipment Type, Tracking Number, Additional Charges, and Agent (Notify Party). All are checked.
 - 2. Results Table Setup:** A table with columns 'Result Column' and 'Show?'. Fields include Status, Submitted Date, Tracking Number, Consignee, Final Destination, Shipment Type, Service Type, Dangerous Goods, Additional Charges, and Agent (Notify Party). All are checked.
 - 3. Sort Order:** 'Sort first by:' is set to Status, Ascending (A-Z). 'then by:' is set to [None selected], Ascending (A-Z) for three subsequent rows.

Buttons for 'Reset' and 'Apply' are at the bottom right of the Configure section.


Figure 1: Custom Filter and Configure Searches

To use the Custom Filter feature:

- 1 Click a search link under the **Search** section of the left navigation and then click the **Custom Filter** link in the upper right corner. If there is no **Custom Filter** link then continue to step 2.
- 2 Enter the desired search criteria in the available fields.
For example, if you wanted to save a search that looks for Pending bookings, you could select any of the **Pending Action** from the **Status** drop-down list.
- 3 Expand the **Configure** twisty and check or uncheck the desired fields that will

appear in the criteria and results. Then adjust the sort order as necessary by clicking the up or down arrow next to each row.

For example, if you wanted to see bookings that had the ETD field filled in, select the **Est Departure** checkbox in the **2. Results Table Setup**. The booking results will show the **Est Departure** field.

- 4 Click **Apply** once you have made your configurations.
- 5 Once you have configured the search, click the Save icon ( [Save](#)) in the upper right corner.
- 6 The **Save Search Configuration** pop-up window appears. Enter a name for this search and indicate if you want this to be the default search and if you want the results emailed to you.
If you select **Daily**, **Weekly**, or **Monthly** in the **Email** drop-down list you can have the report emailed to you at a specific time of day.

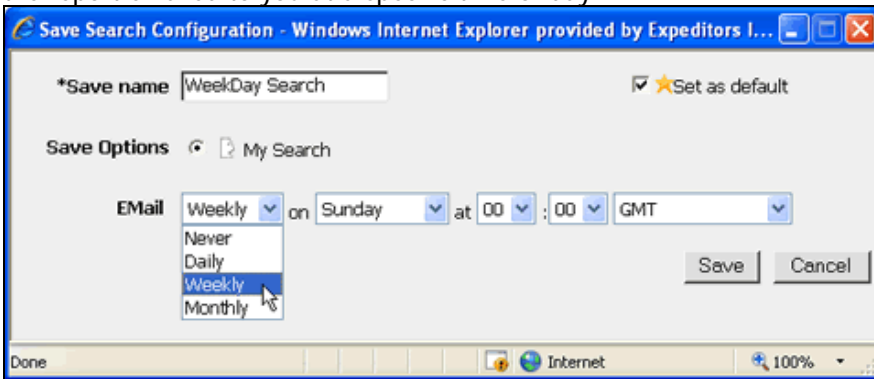


Figure 2: Save Search Configuration Pop-up Window

- 7 After saving the search, you can select it from the Custom Filter drop-down list and then click **Search**.

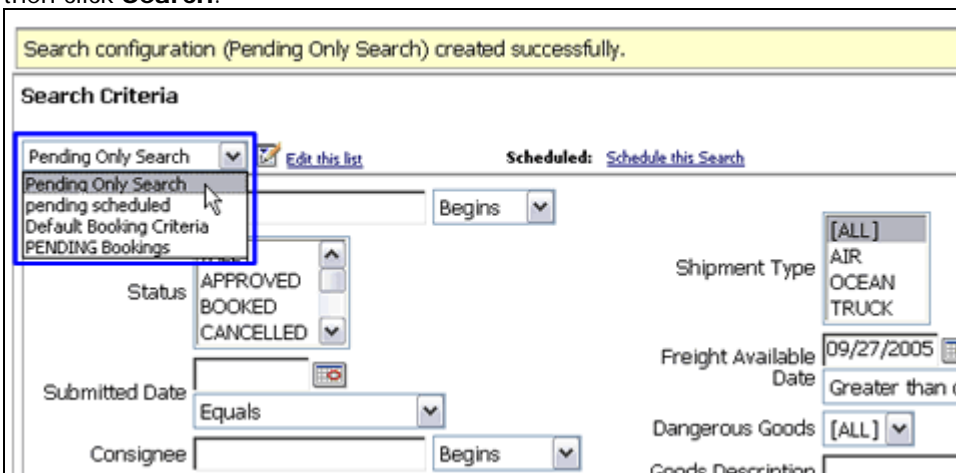


Figure 3: Custom Filter Drop-down List

- 8 You can click **Schedule this Search** to bring up the **Save Search Configuration** pop-up window again to make changes.

Marks & Numbers


Marks & Numbers help make your workflow more efficient by automating the generation of the Marks and Numbers section onto the [printed booking form](#).

- Create and maintain a [Shipper template](#) (either by customizing the Customer template or creating an entirely new template, Shipper Administrators Only)
- Add Marks & Numbers to a booking and customize it for that booking.

For Shippers

As a Shipper, you have the ability to generate a Marks & Numbers in your booking. The format of the Marks & Numbers is determined by the Customer Marks & Numbers Template or the Shipper Marks & Numbers Template if your Shipper Administrator has modified the Customer Template. See [Shipper Marks & Numbers Template](#) below for more information.

To generate marks & numbers in your booking:

- 1 Fill in as much information as possible in your booking. The Marks & Numbers uses the information in your booking.
- 2 Click the **Marks & Numbers** link ( [Marks & Numbers](#)) in your booking and then click **Generate**.

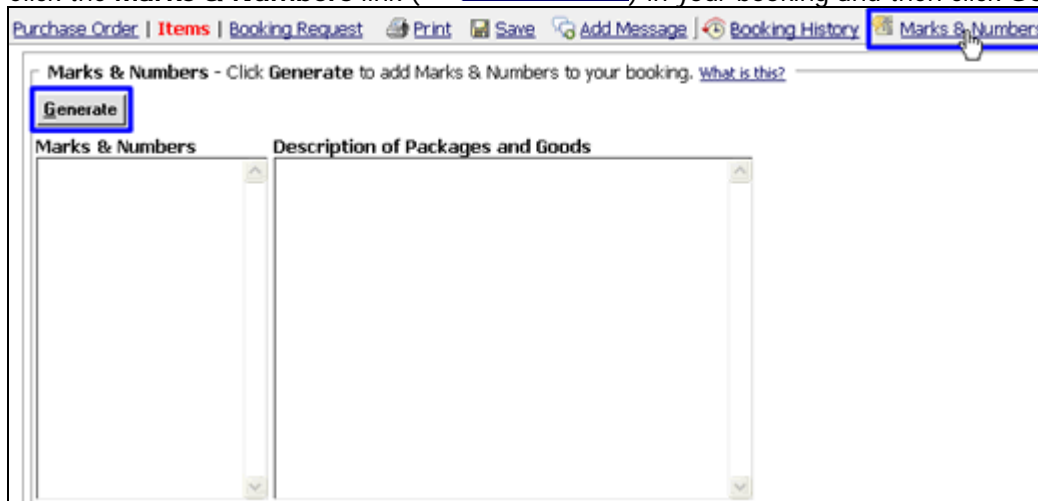


Figure 1: Marks & Numbers Section

- 3 The **Marks & Numbers** and **Description of Packages and Goods** sections will populate with information taken from your booking. The format and information populated is determined by the template created by either the Customer or Shipper Admin or Manufacturer.
- 4 You can make changes to either section by erasing or typing in what you want. However, if you click **Generate** again, the changes you made will be lost.
- 5 Click **Print Booking** to view the Marks & Numbers on the second page.

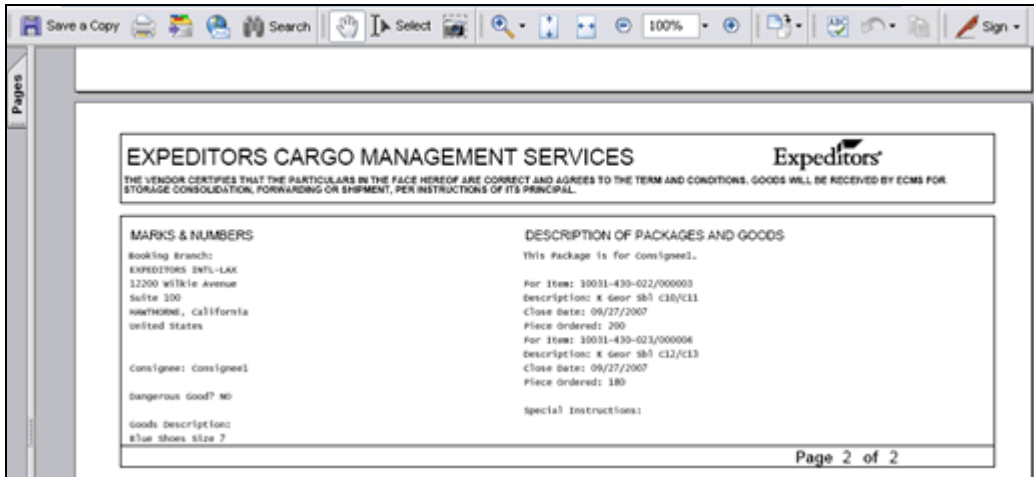



Figure 2: Marks & Numbers on Printed Booking Form Page 2

 **Note:** Occasionally, you will receive a notice on your OMB Home page stating that your Customer has updated their Marks & Numbers template.

Welcome to Order Management Bookings System

Order Management Book

Urgent News


 2007-08-02: Customer1 has updated their Marks & Numbers template. [View What is this?](#)

Figure 3: Notice of Customer Template Change

This is to let you know that you are currently using a Shipper Marks & Numbers template and the Customer's template has changed. Your Marks & Numbers will not automatically update with the change from the Customer's template.

The View link will only appear if you have access to update this section. Once the changes have been viewed, the notice will disappear.

To create a shipper marks & numbers template:

This is only available to **Shipper Administrators**. The Shipper Marks & Numbers template can be a modified version of the Customer Marks & Numbers template or a completely new template.

- 1 In the left navigation menu, click **Configuration** then **Marks & Numbers Template**.
- 2 Your Customer's Marks & Numbers template is shown. Click **Customize** to create your own by modifying the Customer's Marks & Numbers template or by using a blank template.

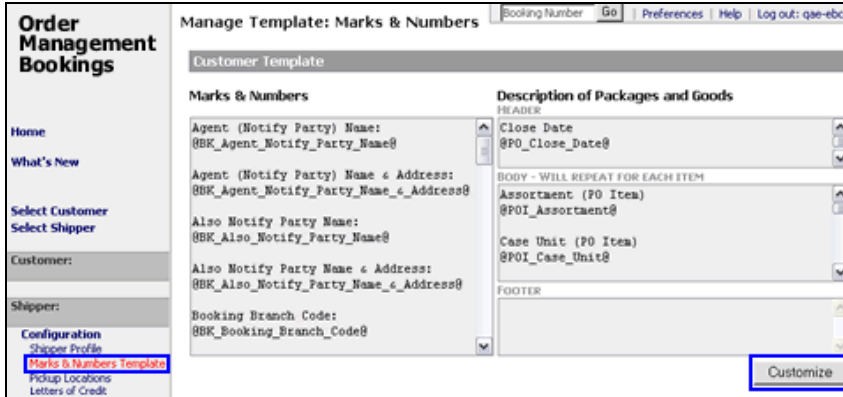


Figure 4: Shipper - Marks & Numbers Template Link

Note: The benefit to using the Customer's Marks & Numbers template without making modifications is that when they make a change to their template, you will automatically receive the updates. Otherwise, you will receive [a notice on your home page](#) and also on the **Manage Template** page.

Manage Template: Marks & Numbers

⚠ Please compare the templates below for changes. [What is this?](#)

Figure 5: Notice of Customer Template Change

You need to decide whether or not to include the changes from the Customer's Marks & Numbers template in your template.

- The **Shipper Template** section appears. Click **Copy Down** to copy the Customer's Marks & Numbers template into the **Marks & Numbers** and **Description of Packages and Goods** sections for modification. Or you can start with the blank template.

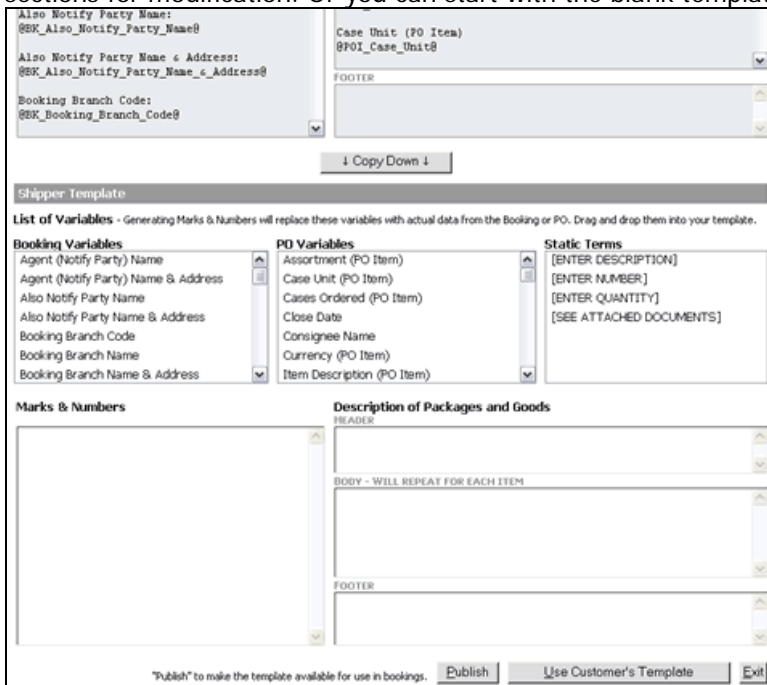


Figure 6: Creating a Shipper Marks & Numbers Template

- To make modifications, select a field variable or term from the **Booking Variables, PO Variables**, or **Static Terms** sections and click and drag the variable or term to your template.

For example, if your template had the **Item ID (PO Item)** and **Pieces Ordered (PO Item)** variables from the **PO Variables** section:

Marks & Numbers

ITEM ID: @POI_Item_ID

PIECES ORDERED: @POI_Pieces_Ordered

Figure 7: PO Variables

And you [generated the Marks & Numbers](#) in a booking that had the following information:

<input type="checkbox"/>	P.O.# ▲	Division	Item ID	Shipper Item ID	Description	Pieces Ordered	Pieces Remaining	Pieces to be Booked	Piece Unit
<input checked="" type="checkbox"/>	26800-1-2		30XA/TBL/1L1/A			10	1	9	EA
<input type="checkbox"/>	26800-1-3		30XA/TBL/1L1/A			10	10		EA
<input checked="" type="checkbox"/>	26816-1-2		30XA/TBL/1L1/A			51	41	10	EA
<input type="checkbox"/>	26816-1-3		30XA/TBL/1L1/A			50	50		EA

Figure 8: Booking Information

The generated Marks & Numbers from the template you created in Figure 7 would be:

Marks & Numbers

ITEM ID: 30XA/TBL/1L1/A,
30XA/TBL/1L1/A

PIECES ORDERED: 10, 51

Figure 9: Generated Marks & Numbers

- Notice in the example above that the **ITEM ID:** and **PIECES ORDERED:** text did not change from the template to the generated Marks & Numbers. The variables shown in Figure 7 are placeholders for information that will be extracted from the booking. We suggest that you enter text for the labels of the variables so that when they are generated, you can quickly identify the information. The terms from the **Static Terms** section are also just text and will not extract information from the booking. They are intended to serve as reminders to manually fill in information while on the specific booking.
- Variables placed in the **Body** section of the **Description of Packages and Goods** will repeat for each item booked.
For example, if your template had these variables in the **Description of Packages and Goods** section:

Description of Packages and Goods

HEADER

@BK_Goods_Description

BODY - WILL REPEAT FOR EACH ITEM

PO#: @PO_PO_Number
Item# @POI_Item_ID PIECES: @BKI_Pieces_to_be_Booked

FOOTER

DANGEROUS GOODS? @BK_Dangerous_Goods(Y/N)

Figure 10: Description of Packages and Goods

And you [generated the Marks & Numbers](#) in a booking that had the following information:

<input type="checkbox"/>	P.O.#	Division	Item ID	Shipper Item ID	Description	Pieces Ordered	Pieces Remaining	Pieces to be Booked	Piece Unit
<input checked="" type="checkbox"/>	26837-1-1		CBL2/AC/A			3600	2450	1000	EA
<input checked="" type="checkbox"/>	26838-1-1		IIBAPRO/CLM/1L1/B			10000	5300	2000	EA

*Goods Description: RIMS AND OTHER CAR PARTS

*Dangerous Goods: Yes No

Figure 11: Booking Information

The generated Marks & Numbers would be:

Description of Packages and Goods

RIMS AND OTHER CAR PARTS

PO#: 26837-1-1
ITEM#: CBL2/AC/A PIECES: 1000

PO#: 26838-1-1
ITEM#: IIBAPRO/CLM/1L1/B PIECES: 2000

DANGEROUS GOODS?: Y

Figure 12: Generated Marks & Numbers - Description of Packages and Goods Section

- When you are finished creating or modifying your template, click **Publish** to have the template used when generating Marks & Numbers in bookings. At any point you can click Use Customer's Template to revert back to the Customer's Marks & Numbers template. Your Shipper template will be lost.

Invite Manufacturers

As a Customer, you must first request to have allow PO Items to be assigned manually before you can invite manufacturers to use OMB. Contact your Expeditors Account Representative or see Configuring Your Customer Profile - Allow Purchase Order Item Assignments by for more information.

The Customer or Shipper can manually assign PO Items but not both. Whoever is selected to assign PO Items will see the **Assign PO Items** link in their navigation and will also have the ability to invite manufacturers to use OMB. The **My Manufacturers** link will appear in the **Configuration** section.

The screenshot shows the 'My Manufacturers' page. On the left, the navigation menu includes 'Order Management Bookings', 'Home', 'What's New', 'Select Customer', 'Customer: ARC Auto', 'Shipper: Universal Technologies', 'Configuration', 'Shipper Profile', 'Marks & Numbers Template', 'My Manufacturers' (highlighted), 'PO/SP Locations', 'Letters of Credit', and 'Shipper Parties'. The main content area has a search bar for 'Manufacturer Name' and a table of manufacturers.

Manufacturer Name	Address	City	State	Country	Contact	Allow Order Assignments?	Invitation Status	History
Cars R Us					Car Employee	Yes	Pending: Resend / Cancel	Pending since 10/22/2010

Figure 1: My Manufacturers

To invite a new manufacturer:


- 1 Click **Configuration**, then **My Manufacturers** from the left navigation menu.
- 2 Click **Invite New Manufacturer**. The **New Manufacturer: Invite to use Order Management Booking** page will appear.

The screenshot shows the 'New Manufacturer: Invite to use Order Management Booking' page. It features a form with the following fields: '*Manufacturer name:', '*First Name:', '*Last Name:', and '*Email:'. Below the form is a note: 'An email invitation will be sent to the manufacturer. When the manufacturer signs into Order Management Booking, you will receive an email update.' There are 'Send' and 'Cancel' buttons at the bottom right.

Figure 2: New Manufacturer Page

- 3 Enter the **Manufacturer name**, this is the name of the manufacturer company.
- 4 Then, in the **Contact Details** section, enter the contact's **First Name**, **Last Name**, and **Email** address.

- 5 Click **Send** to send an email invite to the contact. The email invite will contain a link to the OMB login page. From there, they can enter their existing OMB login and password, or click **New Log In** and verify their name and email address. A login and password for OMB will be emailed to them and they can sign into OMB and start booking PO Items. See New Manufacturer Log In Process for more information.
- 6 You will receive an email once the manufacturer signs into OMB, but you can start to [Assign PO Items](#) to the manufacturer immediately.

	Note: The manufacturer might change the Manufacturer name or Contact from what you sent in the invitation, but the email will display any changes made.
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- 7 You can check the **Invitation Status** and **History** columns to see details about the invitation.
 - If the status is **Pending** - the manufacturer has not accepted or logged into OMB yet. You can click **Resend** to send another email, or **Cancel** to put the invitation in **Cancelled** status.
 - If the status is **Expired** - the invitation will expire after one week and cannot be used by the manufacturer to log into OMB. You can click **Resend** to send another email, or **Cancel** to put the invitation in **Cancelled** status.
 - If the status is **Cancelled** - once you click **Cancel** for an invitation, you cannot resend it and it cannot be used by the manufacturer to log into OMB.
 - If there is no status, look at the **History** column, it should display the date that the manufacturer successfully registered and logged into OMB.

Assign PO Items


The Customer or Shipper can manually assign PO Items to a manufacturer but not both. Whoever is selected to assign PO Items will see the **Assign PO Items** link in their navigation and also have the ability to [Invite Manufacturers](#).

PO Number	Item ID	Manufacturer	Pieces Remaining	Open Date:	Close Date	Description
SW081909002	10047-111-001		15			Sml Red/Sil W1
SW081909002	10047-111-002		25			Med Red/Sil W2
SW081909002	10047-111-003		35			Lrg Red/Sil W3
SW081909002	10047-222-001		45			Sml Blu/Sil W1
SW081909002	10047-222-002		55			Med Blu/Sil W2

Figure 1: Assign PO Items

To assign or remove manufacturers from a PO:

- 1 Click **Assign PO Items** from the left navigation menu. Enter the search criteria for the POs you want to assign and click **Search**.

 **Note:** If you do not see the **Assign PO Items** link in your left navigation, you are not set up to manually assign POs to manufacturers. Please contact your Expeditors Account Representative.


- 2 Select the check boxes next to the POs and click **Assign Manufacturer**. If you want to assign the manufacturer to the entire PO, click the **Apply to full PO** check box.
- 3 The **Assign Purchase Orders** pop-up window will appear. Your manufacturers will appear and you can search for or select the manufacturer you want to assign. If you can't find the manufacturer you want, click **New Manufacturer** to send an email invite to the manufacturer to use OMB. See [Invite Manufacturers](#) for more information.

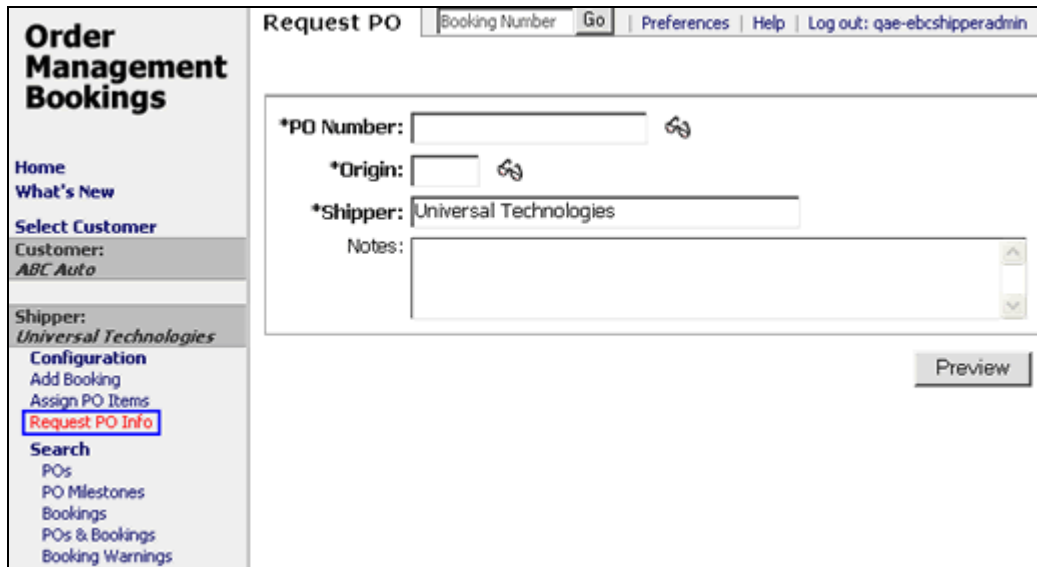
Figure 2: Assign Purchase Orders Pop-up Window

- 4 The manufacturer you selected will appear in the **Manufacturer** column for the POs you selected.
- 5 To remove manufacturers from a PO item, you can either assign a different manufacturer, which will overwrite the previous one assigned, or click **Remove Manufacturer**, and the PO item will not have a manufacturer assigned.

Requesting POs

If you're logged in as a **Shipper** and don't see a PO you need to book against, then you can click the **Request PO Info** link in the left navigation to use the Request PO feature to contact the customer. OMB will send the customer an email with details about the requested PO.

 **Note:**
In some cases, the PO isn't showing up in the OMB tool because the customer hasn't sent Expeditors the PO information via EDI yet.



The screenshot shows the 'Request PO' page within the 'Order Management Bookings' system. The page has a top navigation bar with 'Request PO', 'Booking Number', 'Go', 'Preferences', 'Help', and 'Log out: qae-ebcshipperadmin'. On the left is a navigation menu with sections: 'Home', 'What's New', 'Select Customer' (with 'Customer: ABC Auto' below it), 'Shipper: Universal Technologies' (with 'Configuration' sub-section containing 'Add Booking', 'Assign PO Items', and 'Request PO Info' which is highlighted with a red box), and 'Search' (with 'POs', 'PO Milestones', 'Bookings', 'POs & Bookings', and 'Booking Warnings' below it). The main content area contains form fields for '*PO Number:', '*Origin:', and '*Shipper:' (with 'Universal Technologies' entered). Below these is a 'Notes:' text area. A 'Preview' button is located at the bottom right of the form area.

Figure 1: Shipper - Request PO Page

The email address entered in the **Contact** section of your [Shipper Profile](#) will be used.