Order Management Bookings Help - Shippers

Table of Contents

Purpose of this Document

The purpose of this document is to introduce you to the features and functionality of the Order Management Bookings application. This document is 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

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 web browser and go to the OMB login page.
2. Enter your **user name** and **password** in the indicated fields.
3. Click **Log In**.

Forgot Your Password and/or User Name?
If you forgot your password, you can click **Forgot password?** from the OMB login page. If you would like instead to change your password, please see Changing Your Password. If you forgot your username, please contact expo Helpdesk (expo.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.

Changing Your Password

When you get a new OMB account or forget your password, a new password will be emailed to you. You can change your password by following the instructions below.

To change your OMB password:

1 Go to the exp.o Visibility (Legacy) page (https://portal.expeditors.com/expo/login?legacy). OMB and exp.o Visibility (Legacy) are interconnected, allowing you to have one username and one password for multiple Expeditors applications. Make sure to choose **Legacy exp.o (this page)** when you login. You can change your default exp.o login page after you've changed your password.

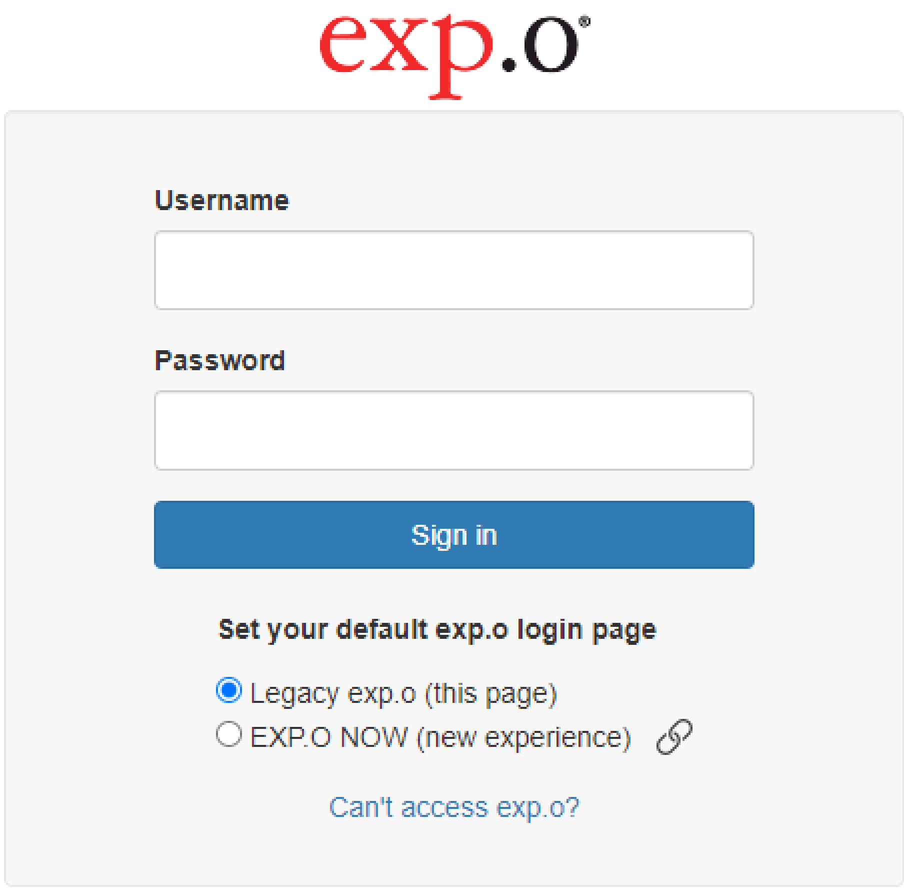


Figure 1: exp.o Legacy Login Page

2 Login with the same username and password that you were given in your email.

3 On the exp.o home page, click your name in the upper right-hand corner and select **Account** from the drop-down list.

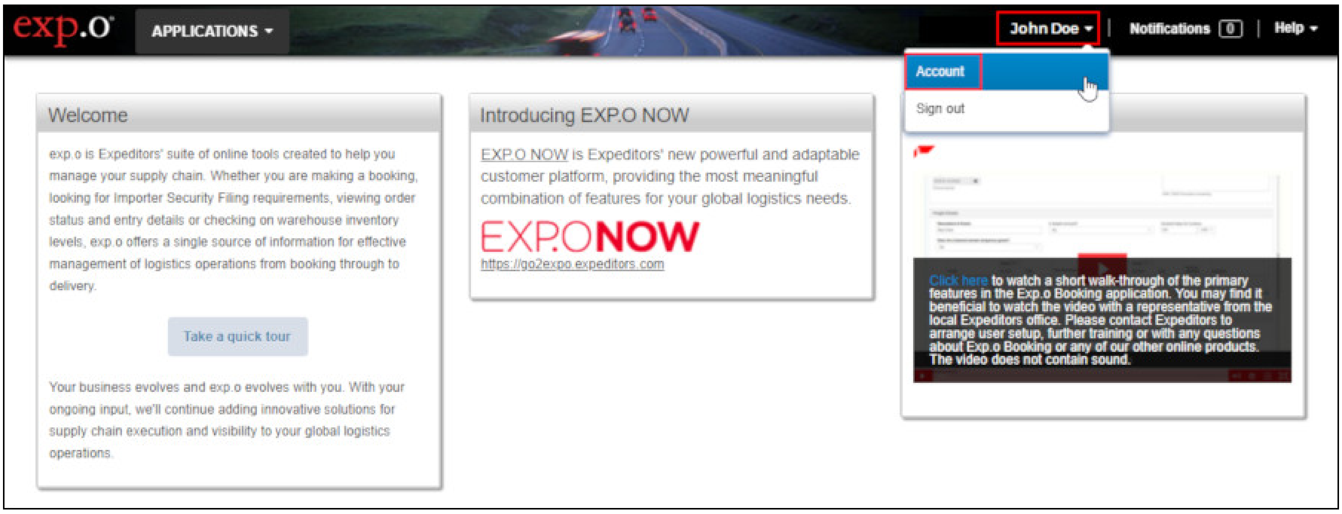


Figure 2: Username>Account

4 A new **Account** pop-up window will appear. At the bottom of the window, in the **Password** section, click **Change Password**.

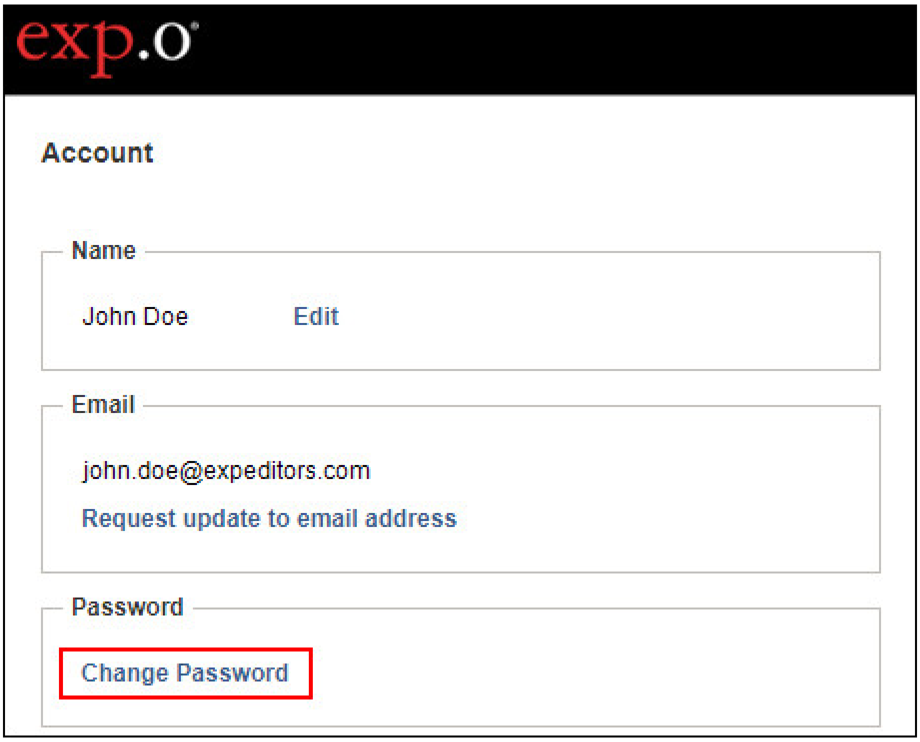


Figure 3: Change Password

5 Enter your current password from the email you were sent, and then your new password. Click **Save**.

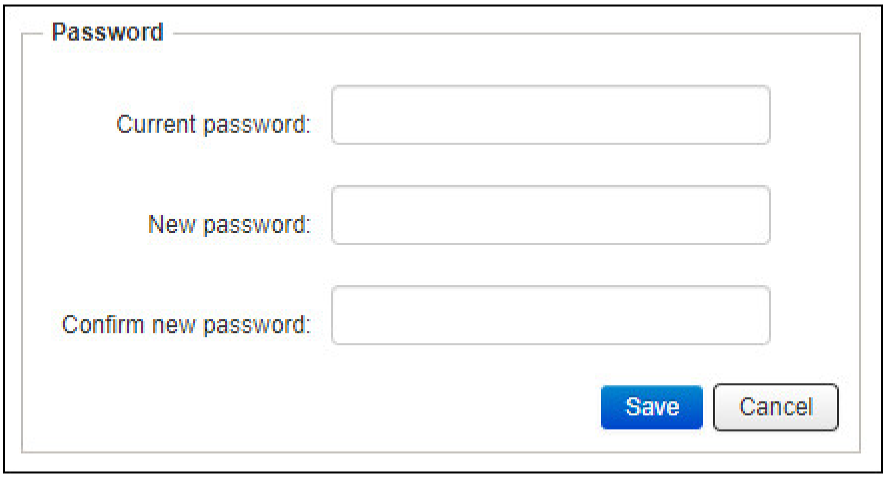


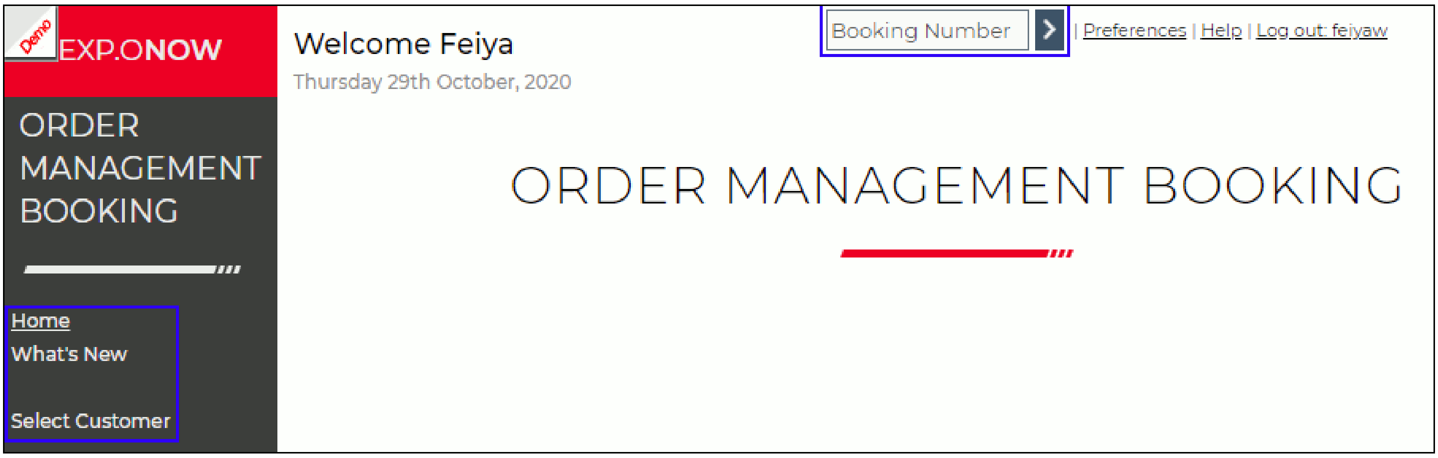
Figure 4: New Password

6 You can then sign out and sign into OMB (https://omb.expeditors.com/omb/Login.jsp) using your new password.

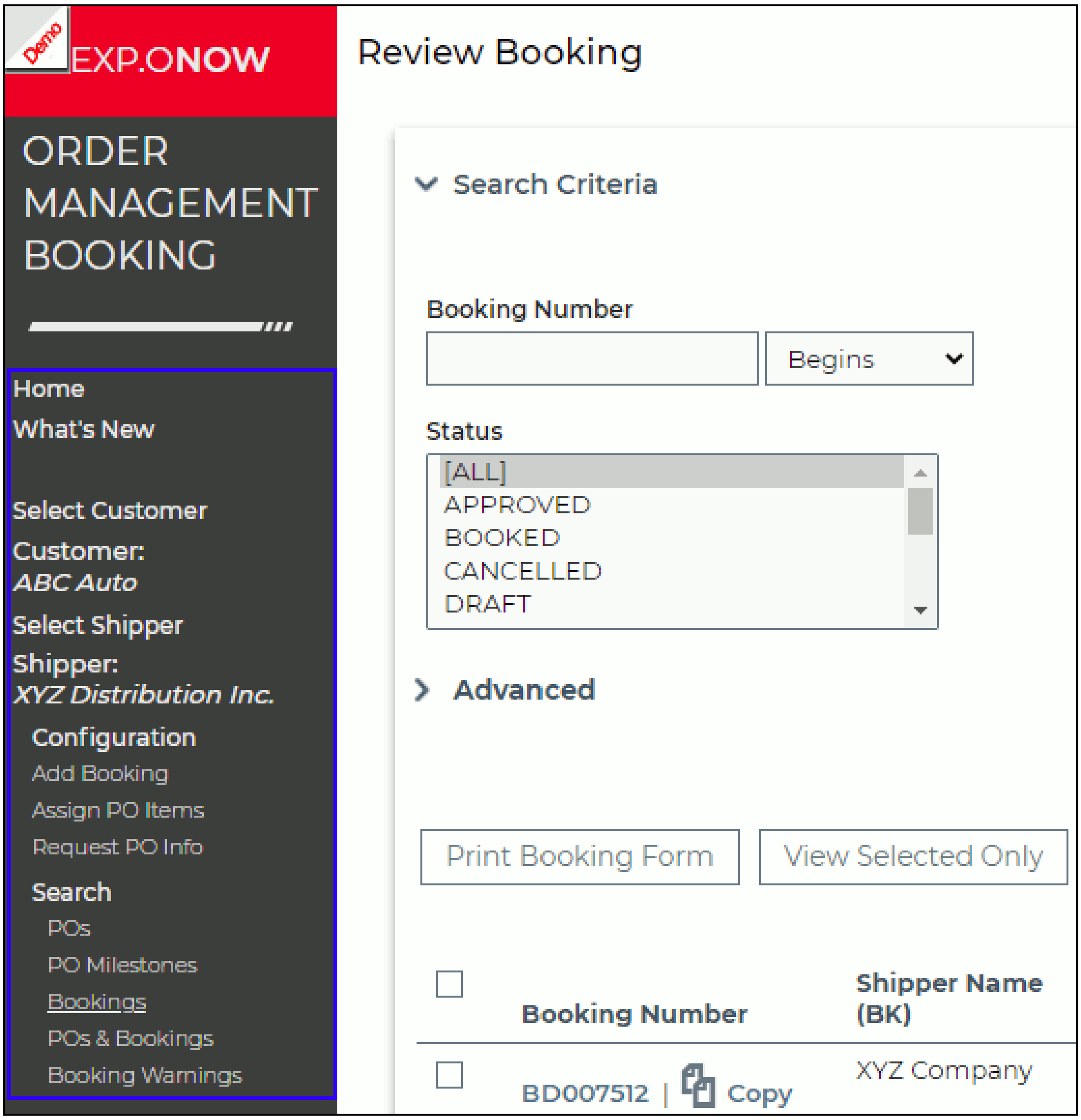
Navigation

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.



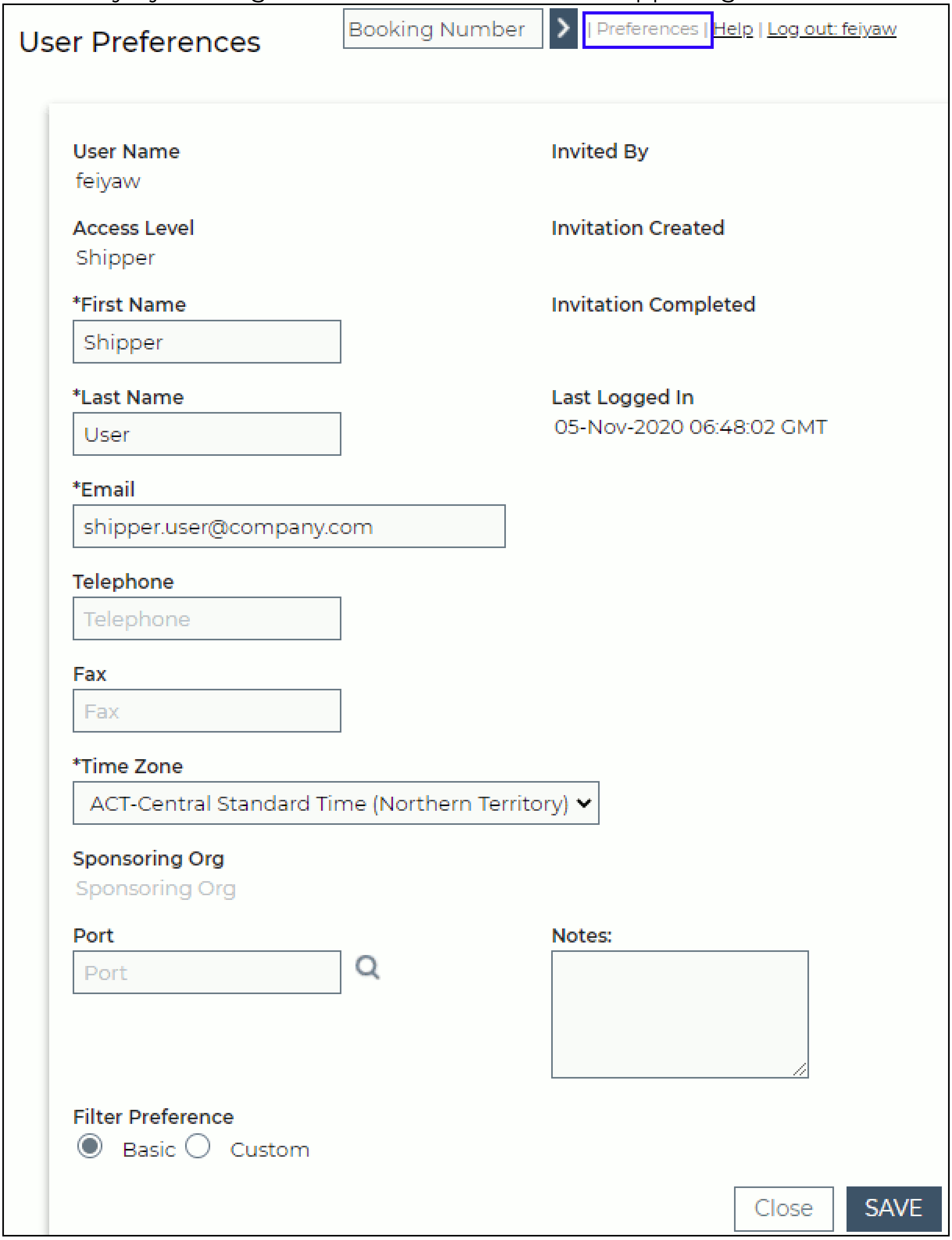
Main Page



Shipper Left Navigation Menu - Search Bookings

Configuring Your User Preferences

Your preferences contain specific user 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 Preferences 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 search icon () to use the Port look-up feature.

Filter Preference
Indicates the default mode (Basic or Custom) that 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 search so the system always filters out certain bookings that are returned. See Using the Custom Search for more information.

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.

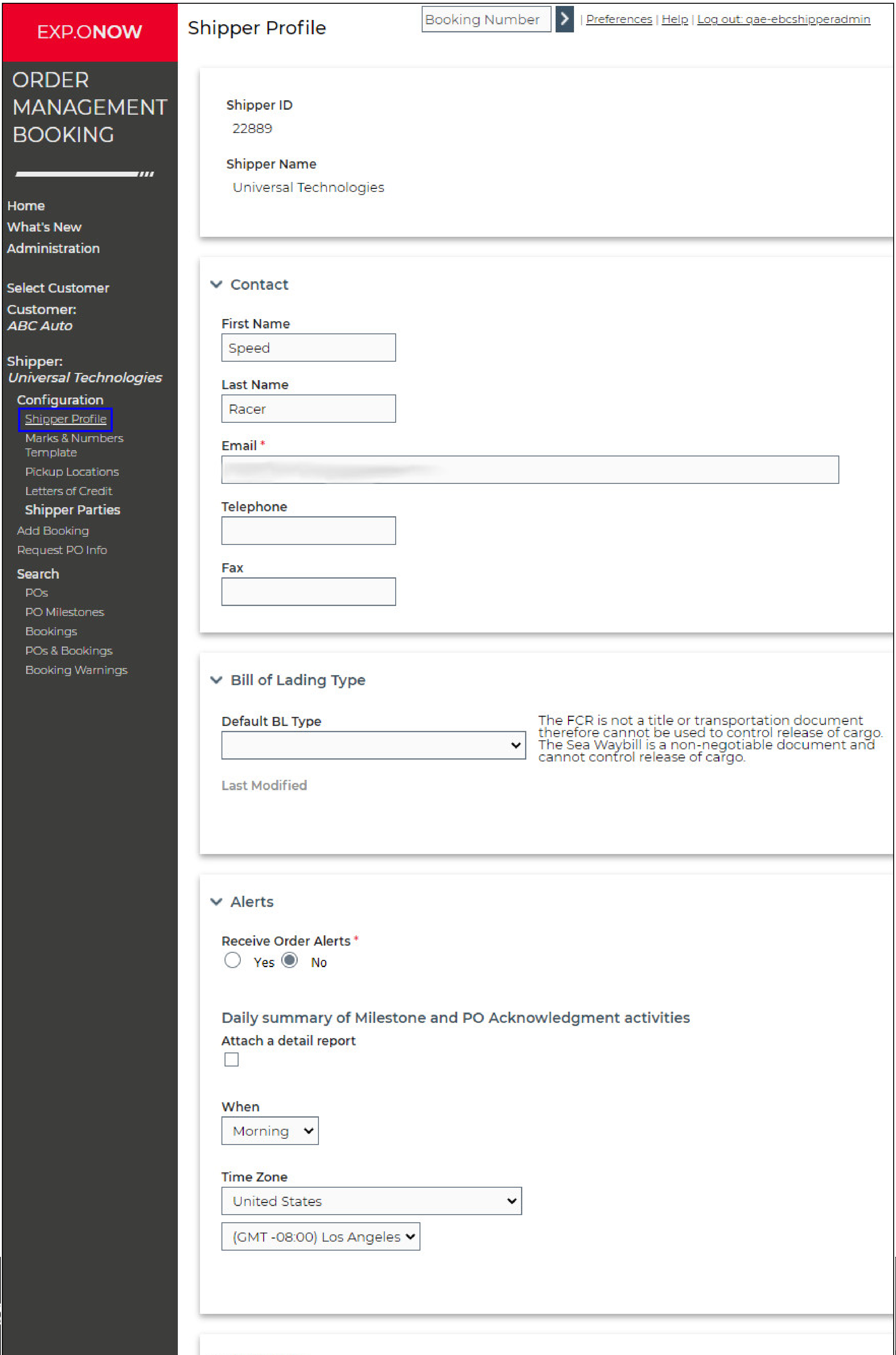

EXP.ONOW
ORDER MANAGEMENT BOOKING
Home
What's New
Administration
Select Customer
Customer:
ABC Auto
Shipper:
Universal Technologies
Configuration
Shipper Profile
Marks & Numbers Template
Pickup Locations
Letters of Credit
Shipper Parties
Add Booking
Request PO Info
Search
POs
PO Milestones
Bookings
POs & Bookings
Booking Warnings
Shipper Profile
Booking Number
| Preferences | Help | Log out: qae-ebcshipperadmin
Shipper ID
22889
Shipper Name
Universal Technologies
Contact
First Name
Speed
Last Name
Racer
Email *
Telephone
Fax
Bill of Lading Type
Default BL Type
The FCR is not a title or transportation document therefore cannot be used to control release of cargo. The Sea Waybill is a non-negotiable document and cannot control release of cargo.
Last Modified
Alerts
Receive Order Alerts *
Yes
No
Daily summary of Milestone and PO Acknowledgment activities
Attach a detail report
When
Morning
Time Zone
United States
(GMT -08:00) Los Angeles

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.

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 (,).

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

- Sea Waybill to consignee & FCR to shipper
- Original BL to consignee & FCR to shipper
- Sea Waybill to shipper/consignee & NO FCR
- Original BL to shipper & 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:**
  - A**ttach a detail report:** Select this check box to have an Excel spreadsheet attached with details to your summary email.
  - Select **When** you want the summary of PO acknowledgement information sent to you, and your **Time Zone**.

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

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 show up in the lookup for the **Pickup Location** field in the Booking Request tab of a booking.

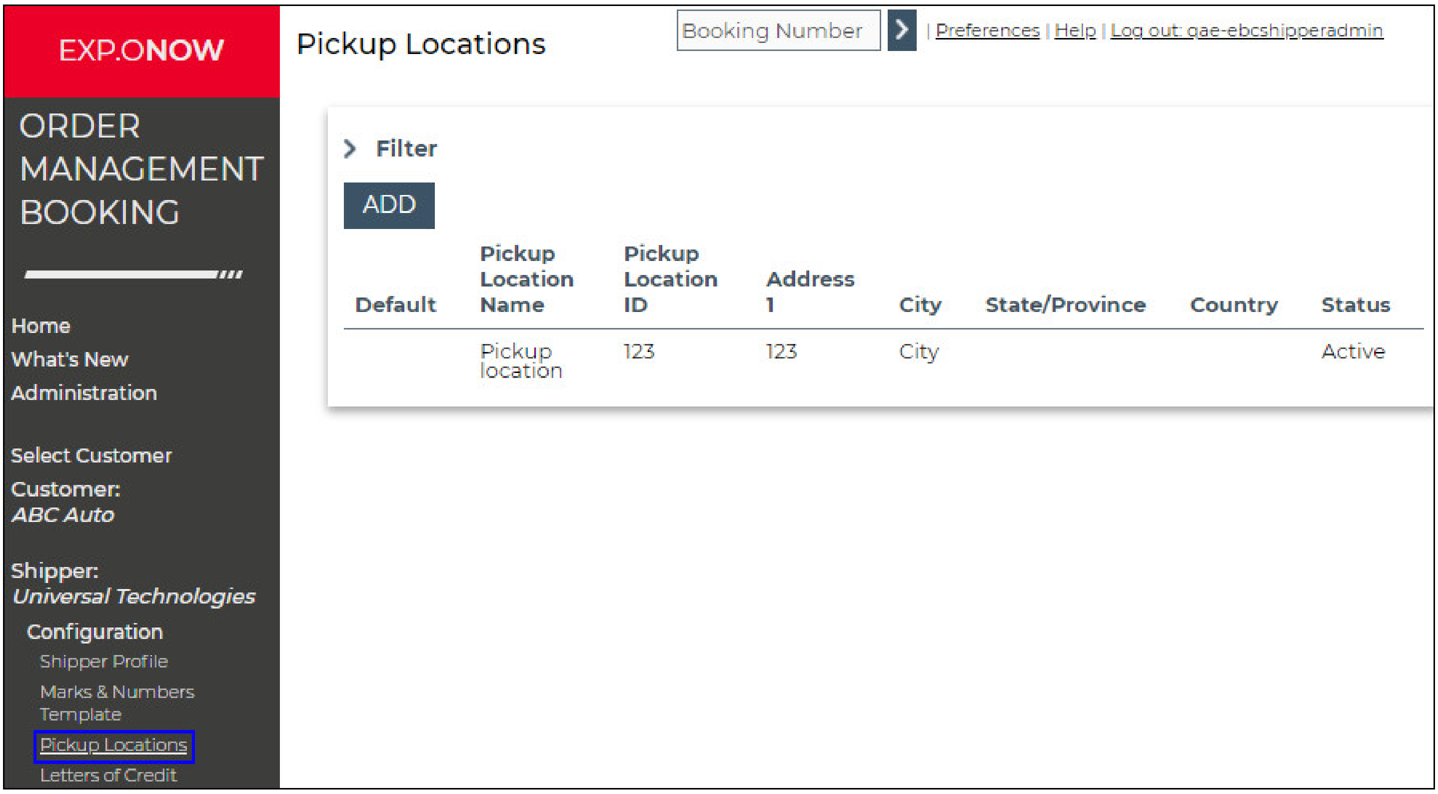


Figure 1: Shipper - Pickup Locations Page

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.

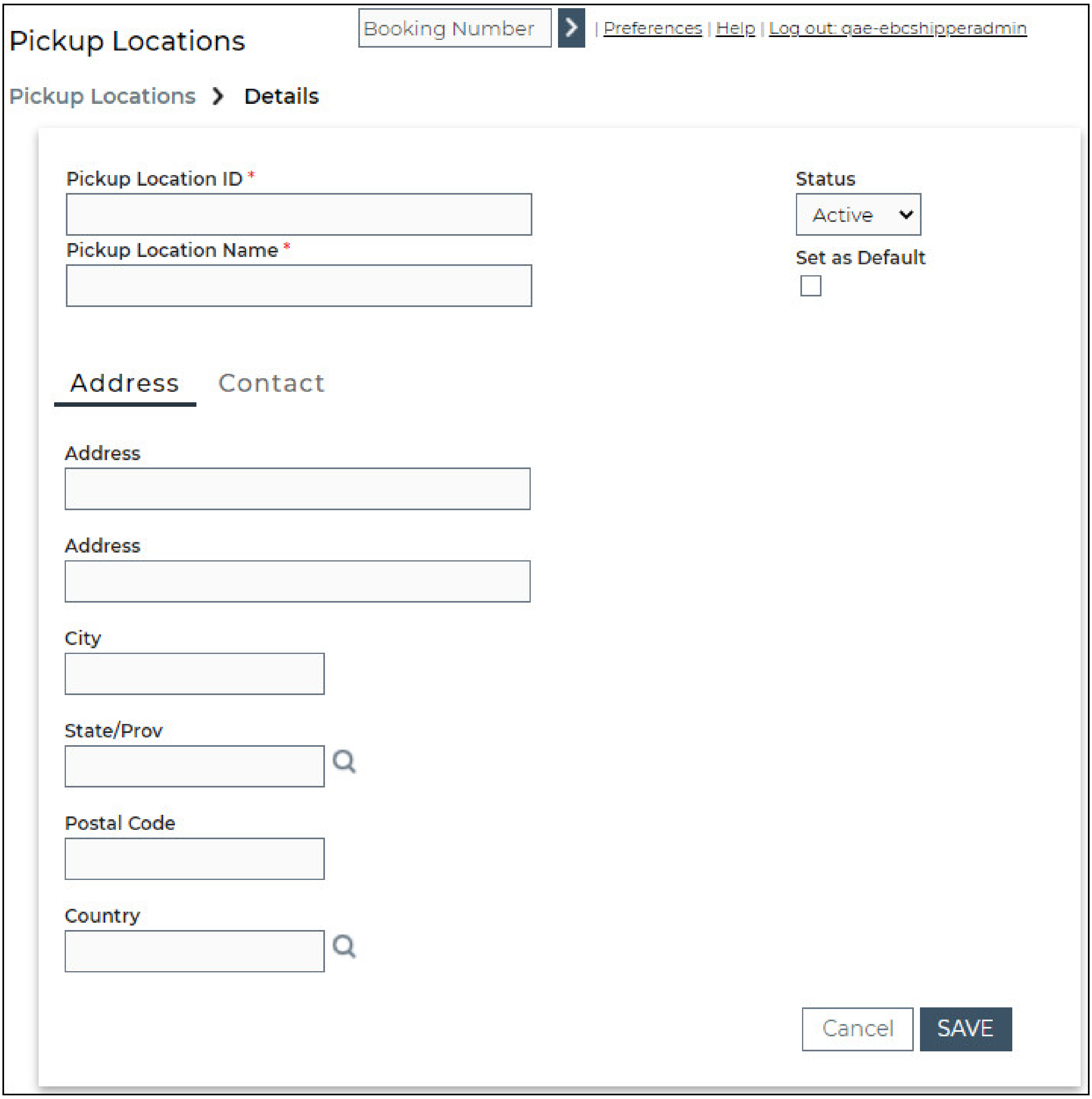


Figure 2: New Pickup Location Details

3 Enter Address information and then click Contact to enter the contact information for someone at the pickup location.

4 To set the pickup location as the default, select the Set as Default check box.

5 To change the Status of a pickup location, select Active or InActive from the drop-down list. Inactive pickup locations will not appear in the lookup.

6 Click Save once completed.

Your new Pickup Location will be visible on the Pickup Locations page and will appear when shippers use the lookup feature for the Pickup Location field in the **Booking Request** tab of a booking. To edit a pickup location, click the row of the pickup location you want to edit.

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.

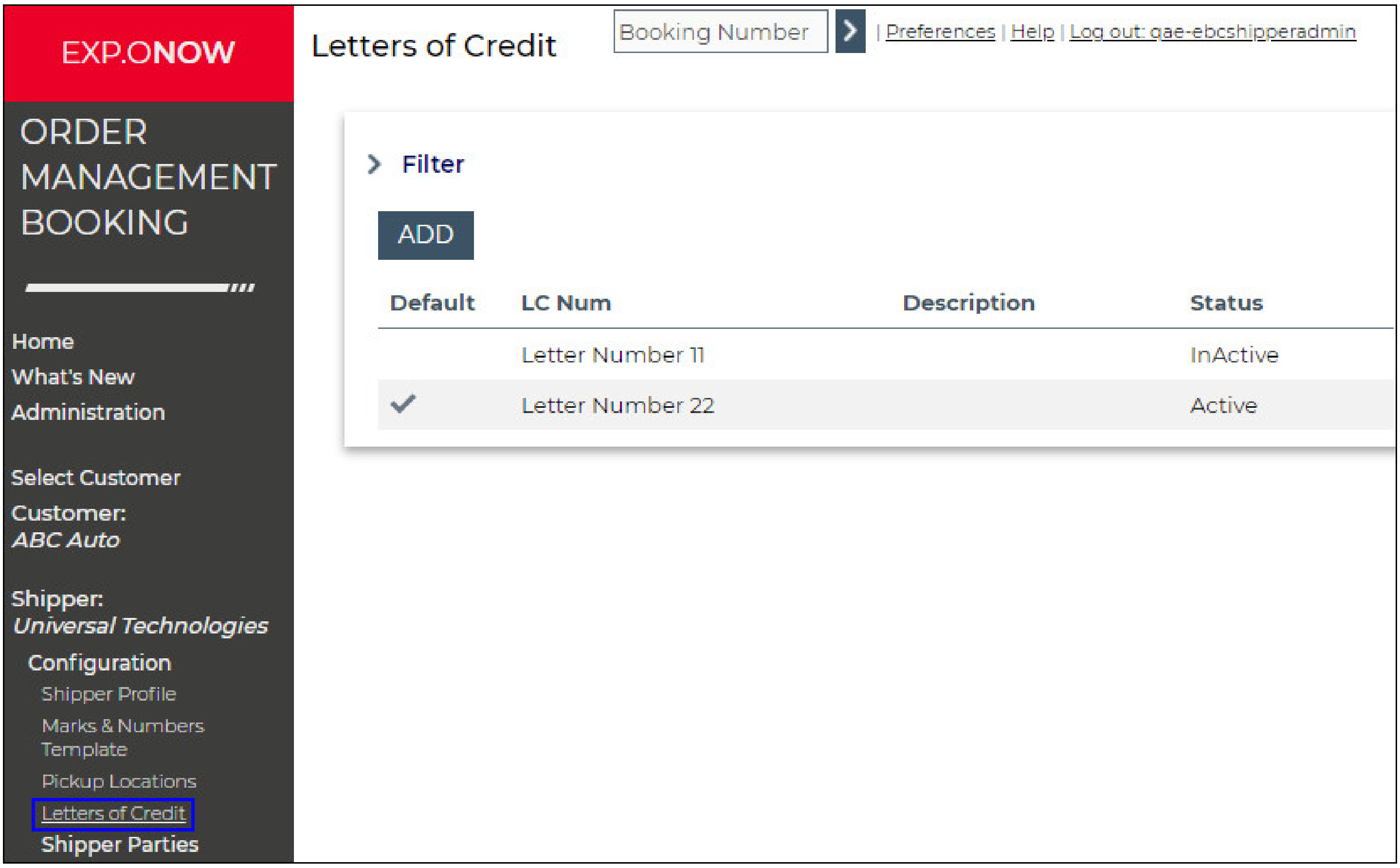


Figure 1: Shipper - Letters of Credit Page

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.

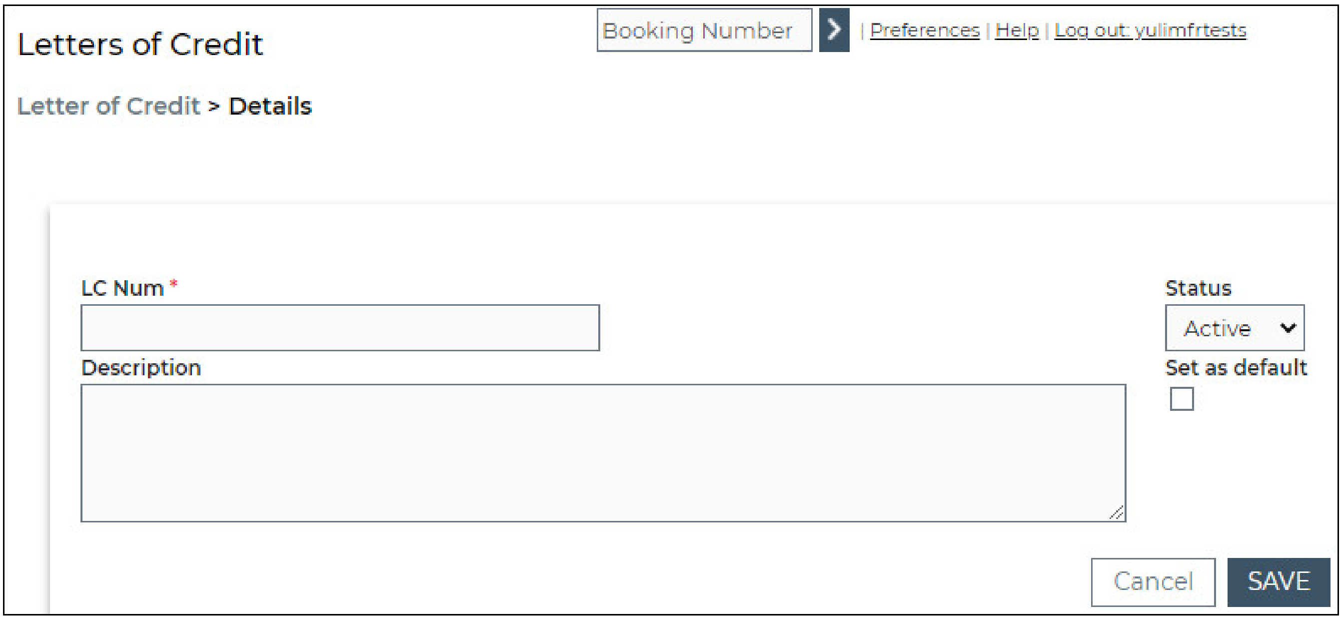


Figure 2: New Letter of Credit Details

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.

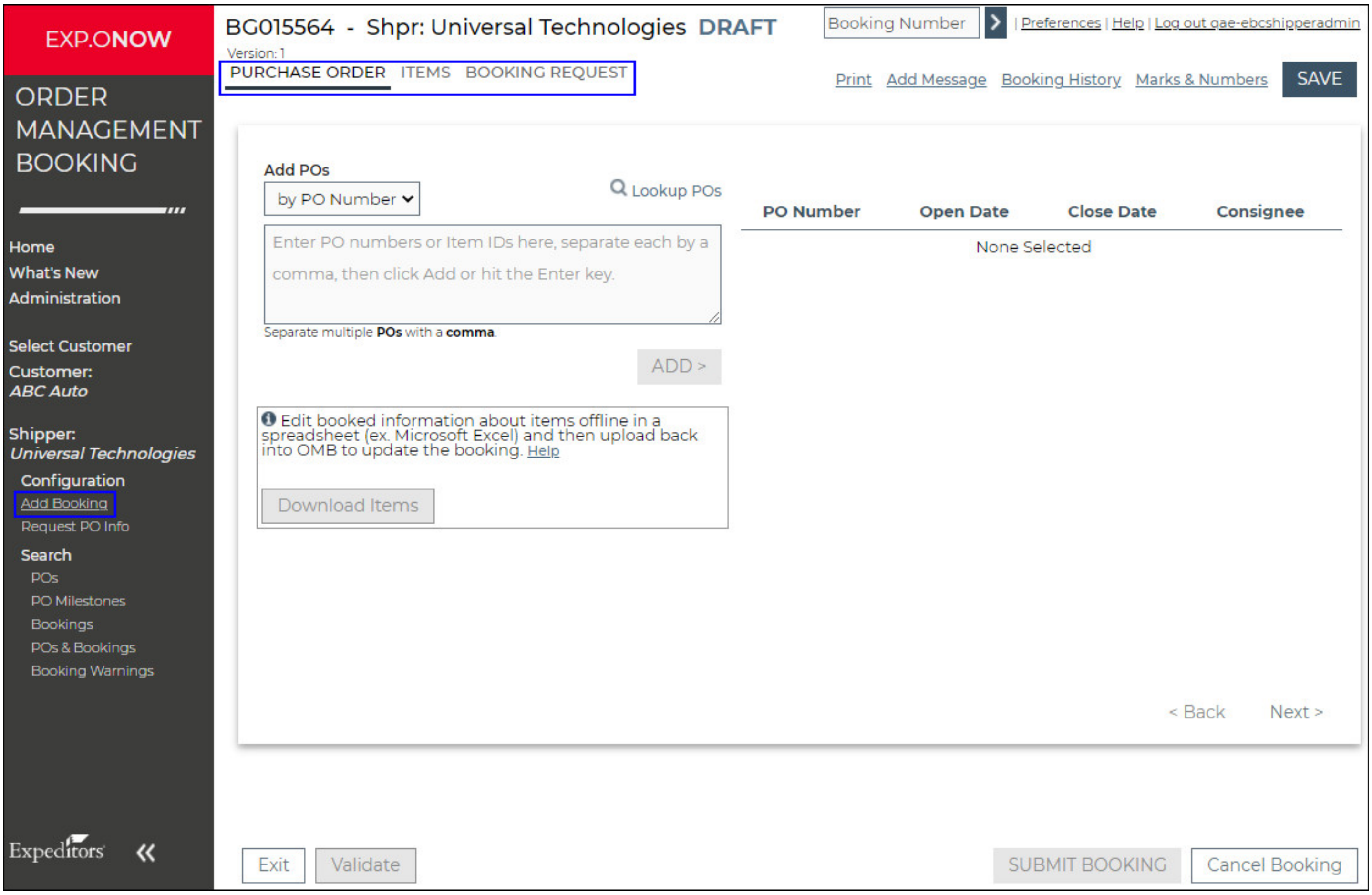


Figure 1: Shipper Add Bookings - Purchase Order Tab

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** button as necessary. Save your progress before logging out of the system.

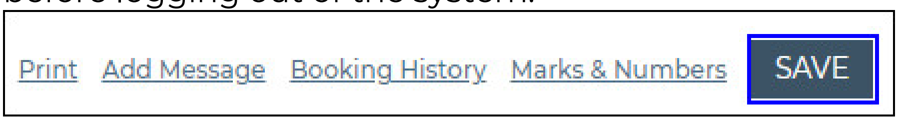


Figure 2: Save Button

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 numbers 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:** A PO cannot be linked to more than one draft booking at a time.
>
> 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 (see Step 3).
>
> If you want to edit booked information about items offline and then upload them back into OMB, please see Upload Items on a Booking for more information.

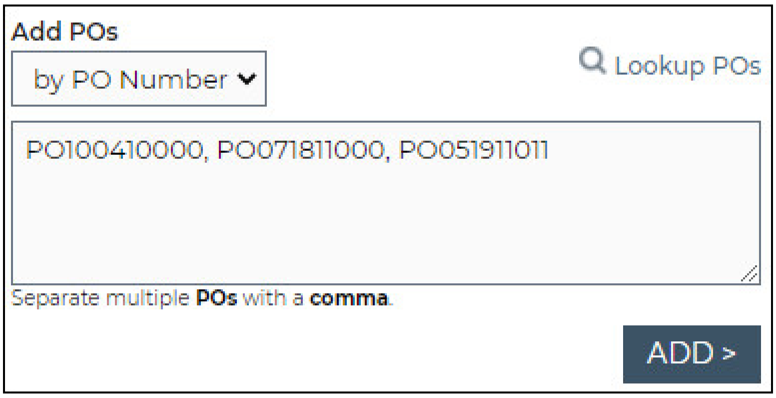
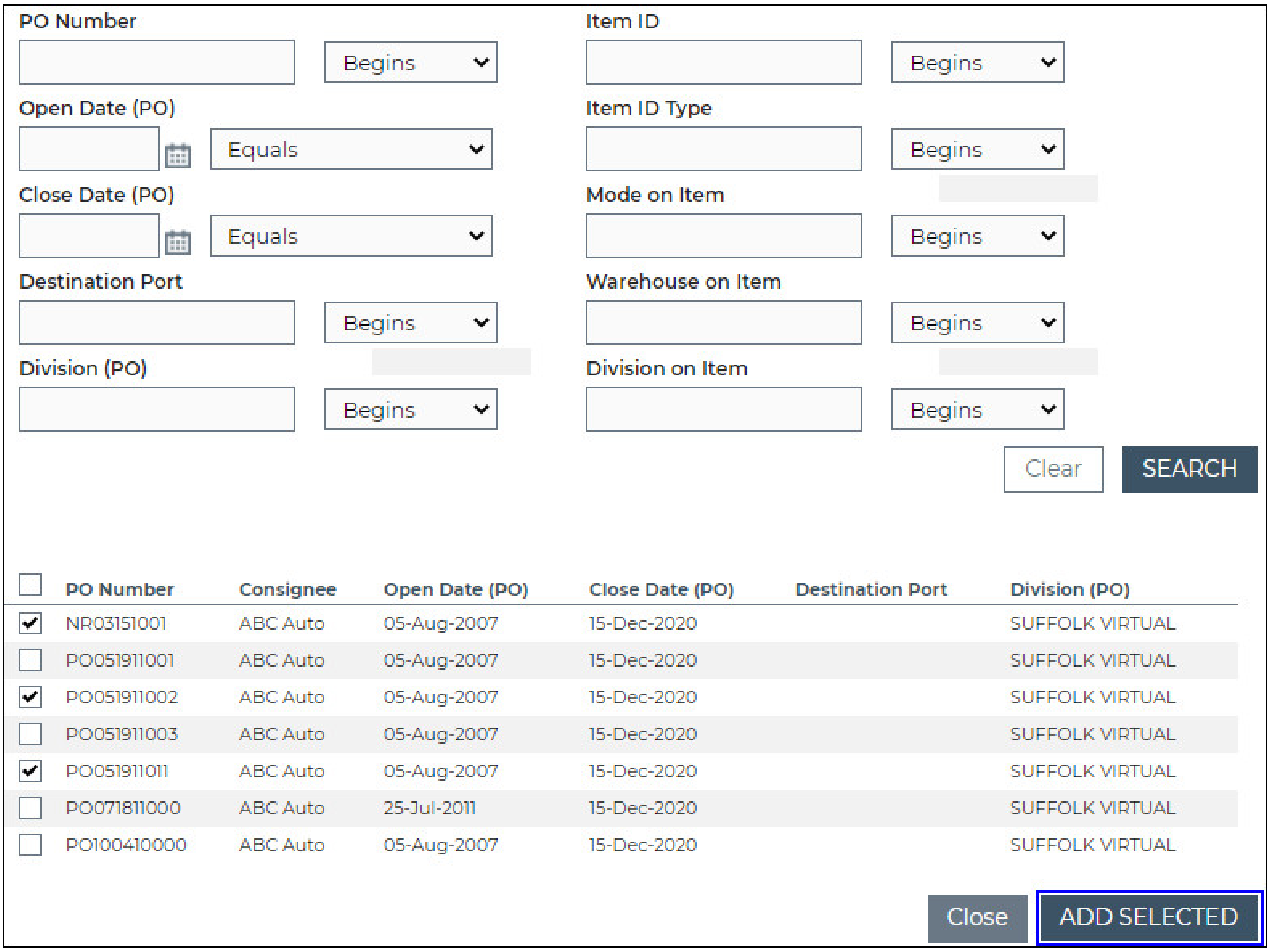


Figure 3: Enter PO Numbers or Item IDs

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 check box next to the PO numbers you want and click **Add Selected**.



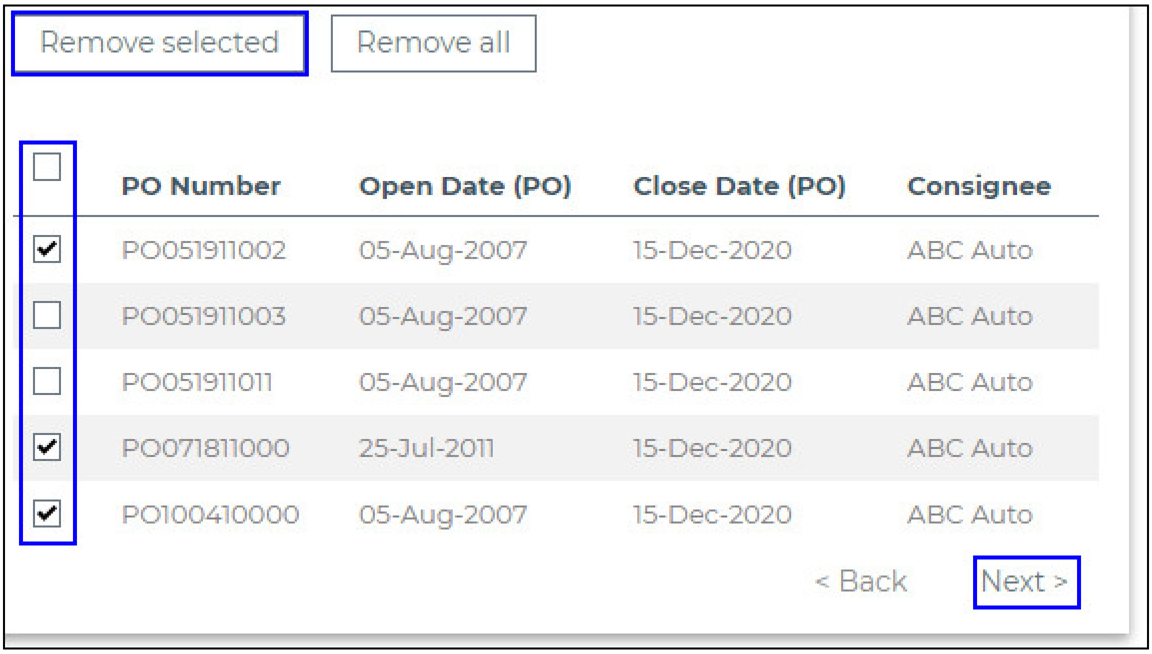
PO Number | Begins
Open Date (PO) | Equals
Close Date (PO) | Equals
Destination Port | Begins
Division (PO) | Begins
Item ID | Begins
Item ID Type | Begins
Mode on Item | Begins
Warehouse on Item | Begins
Division on Item | Begins
Clear
SEARCH

	PO Number	Consignee	Open Date (PO)	Close Date (PO)	Destination Port	Division (PO)
☑	NR03151001	ABC Auto	05-Aug-2007	15-Dec-2020		SUFFOLK VIRTUAL
☐	PO051911001	ABC Auto	05-Aug-2007	15-Dec-2020		SUFFOLK VIRTUAL
☑	PO051911002	ABC Auto	05-Aug-2007	15-Dec-2020		SUFFOLK VIRTUAL
☐	PO051911003	ABC Auto	05-Aug-2007	15-Dec-2020		SUFFOLK VIRTUAL
☑	PO051911011	ABC Auto	05-Aug-2007	15-Dec-2020		SUFFOLK VIRTUAL
☐	PO071811000	ABC Auto	25-Jul-2011	15-Dec-2020		SUFFOLK VIRTUAL
☐	PO100410000	ABC Auto	05-Aug-2007	15-Dec-2020		SUFFOLK VIRTUAL

Close
ADD SELECTED

Figure 4: Lookup PO Pop-up Window

4 The POs will show up in field. If you want to remove POs, select the check box 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.



Remove selected
Remove all

	PO Number	Open Date (PO)	Close Date (PO)	Consignee
☑	PO051911002	05-Aug-2007	15-Dec-2020	ABC Auto
☐	PO051911003	05-Aug-2007	15-Dec-2020	ABC Auto
☐	PO051911011	05-Aug-2007	15-Dec-2020	ABC Auto
☑	PO071811000	25-Jul-2011	15-Dec-2020	ABC Auto
☑	PO100410000	05-Aug-2007	15-Dec-2020	ABC Auto

< Back
Next >

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, select the check box next to the POs and the fields will be automatically filled in.

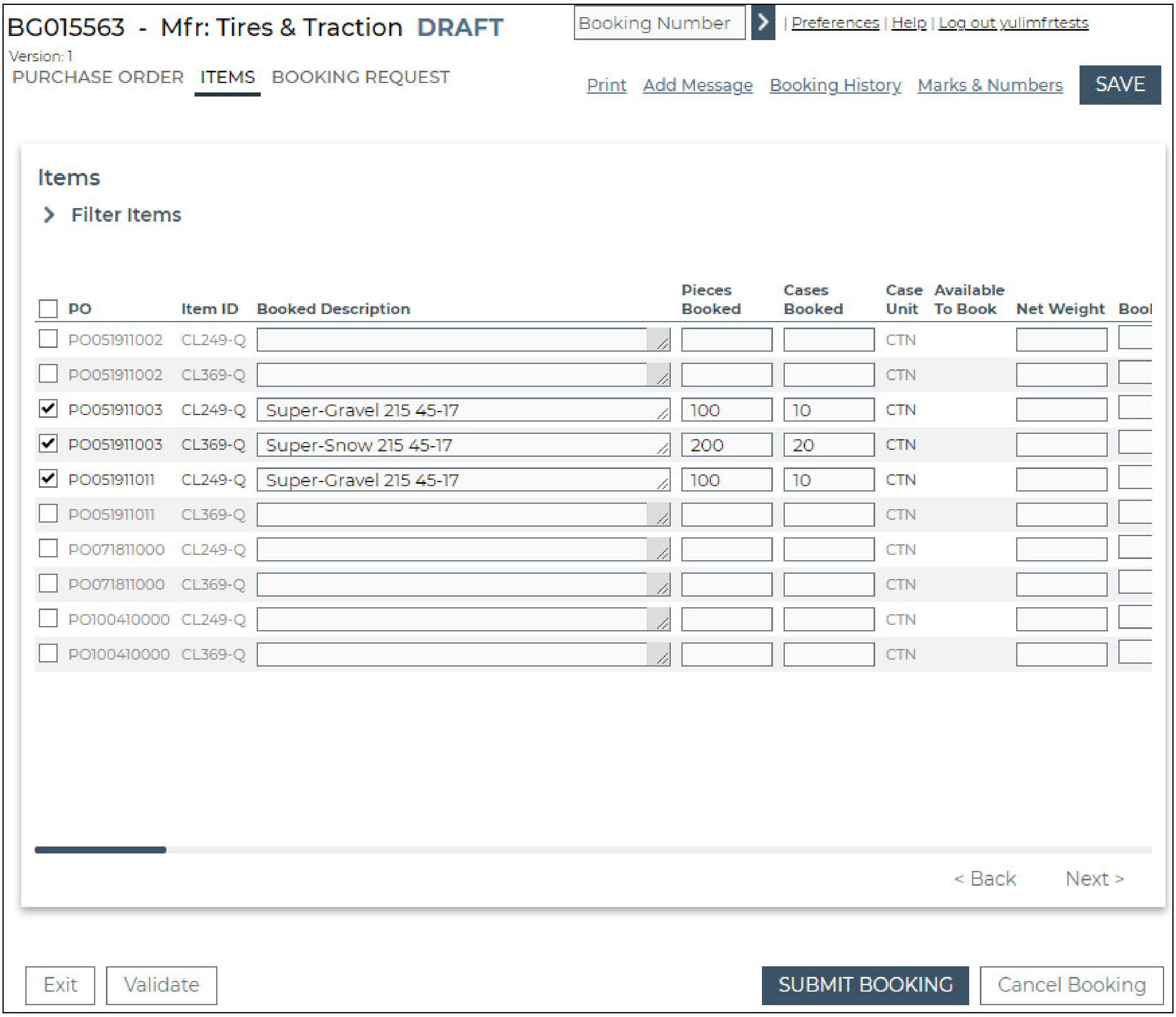


Figure 6: Items Tab

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.

BG015563 - Mfr: Tires & Traction **DRAFT**

Version: 1

Booking Number | Preferences | Help | Log out yulimfrtests

PURCHASE ORDER ITEMS BOOKING REQUEST

Print Add Message Booking History Marks & Numbers SAVE

PO Number	Open Date (PO)	Close Date (PO)	Terms	Pieces Ordered	Pieces Booked	Cases Ordered	Cases Booked	Volume Ordered	Volume Booked (CBM)	Weight Ordered	Weight Booked (KG)
PO051911002	2007-08-05	2020-12-15		300		30		4.810		300.000	
PO051911003	2007-08-05	2020-12-15		300	300	30	30	4.810	4.810	300.000	300.000

Booking Details

Shipper *
Universal Technologies

Agent (Notify Party)

Origin Port Code *

Dest. Port Code *

Consignee *
ABC Auto

Also Notify Party

Final Destination *

Shipper Reference

Booking Branch *

Shipping Details

Shipment Type *
Ocean

Total Weight
400.000 (KG)

Service Type *
CFS

Total Volume *
6.715 (CBM)

BL Type *

The FCR is not a title or transportation document therefore cannot be used to control release of cargo.
The Sea Waybill is a non-negotiable document and cannot control release of cargo.

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
Auto Parts

Goods Details

Goods Description *

Show Routing Request

Dangerous Goods *

Lithium batteries *

Does this shipment contain solid wood packing materials? *

Letter of Credit Number
345245234523 45

Special Instructions/Equipment Request:

Figure 7: Booking Request Tab

Booking Details

- Bold and starred fields are required.
- Click the search 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 search 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** 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 search 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:

If documents have been created by the supplier or others, you can attach them to the booking.

> **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.

Verified Gross Mass

1 First, you must create Weigher and Signer Parties in your configuration. See Shipper or Manufacturer Parties for information on how to do that.

2 To enter the Verified Gross Mass of a container, click **New Container** in the **Verified Gross Mass** section, immediately below **Documents**. The **Enter Verified Gross Mass** pop-up window will appear.

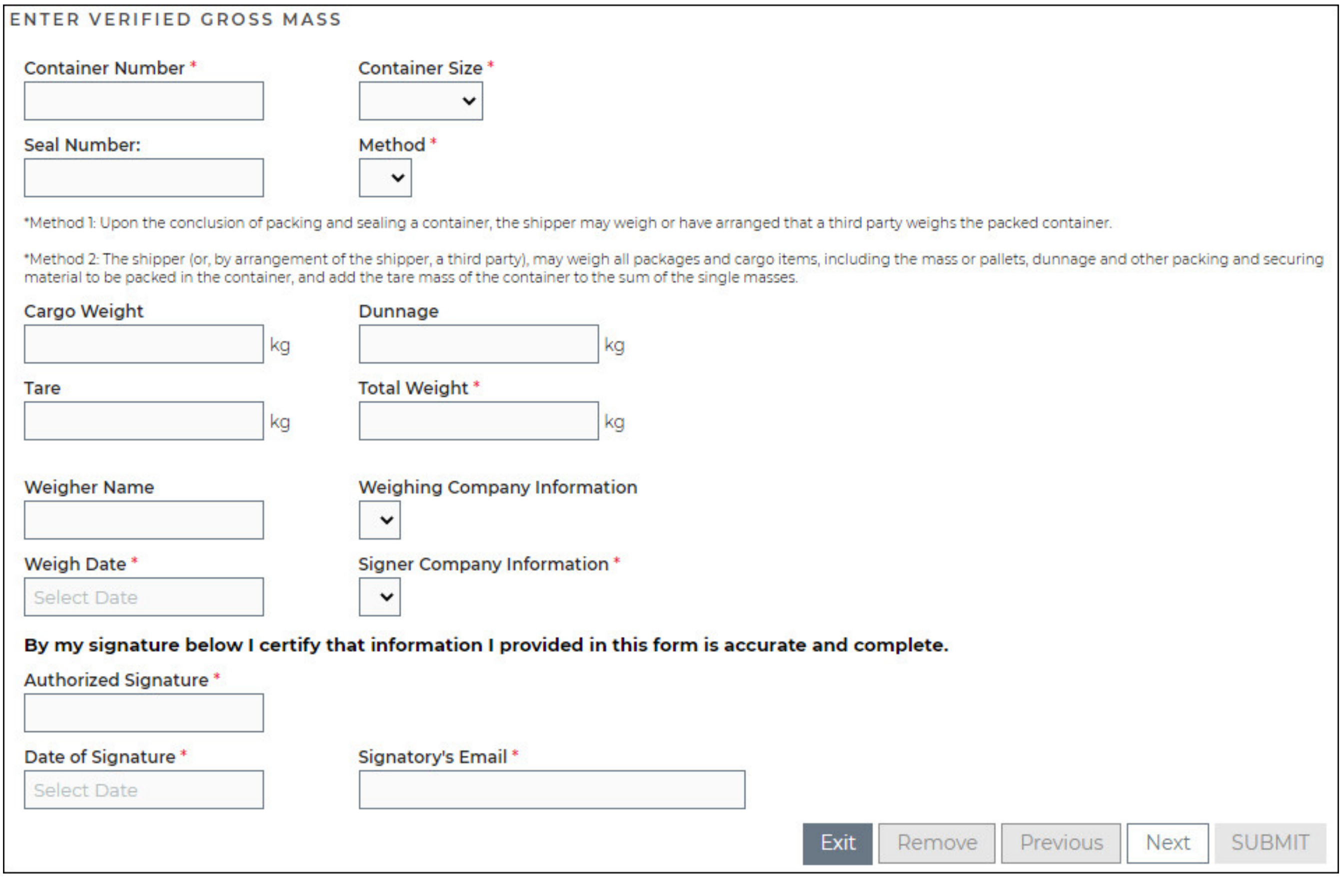


Figure 8: Enter Verified Gross Mass

3 Enter information about the container.

The **Container Number** should be in AAAA1234567 format. The **Seal Number** is optional. Select the **Container Size**. The **Method** determines how you want to verify the gross mass. Method **1** allows you to enter just the **Total Weight**. Method 2 allows you to enter the **Cargo Weight**, **Dunnage**, and **Tare** and the **Total Weight** will be automatically calculated for you.

4 Select the Weigher Company Information from the drop-down list, this list is of the Weigher parties you entered in your configuration in Step 1.

5 Select the Signer Company Information from the drop-down list, this list is of the Signer parties you entered in your configuration in Step 1.

6 Electronically sign by entering your signature in the Authorized Signature field and entering your email address in the Signatory's Email field and selecting the Date of Signature.

7 If you need to add additional containers to the booking, click Next, and repeat Step 3.

The **Weigher** and **Signer** and **Signature** information will be carried over to the new container.

8 When you are finished adding containers, click Submit and an email will be sent to you and the Booking Branch with the container information.

> **Note:** You can review the history of any changes made to the Verified Gross Mass by viewing the Booking History.
>
> If you need to remove a container, click the row of the container you want to remove and click **Remove**, then click **Submit** to save your changes.

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.

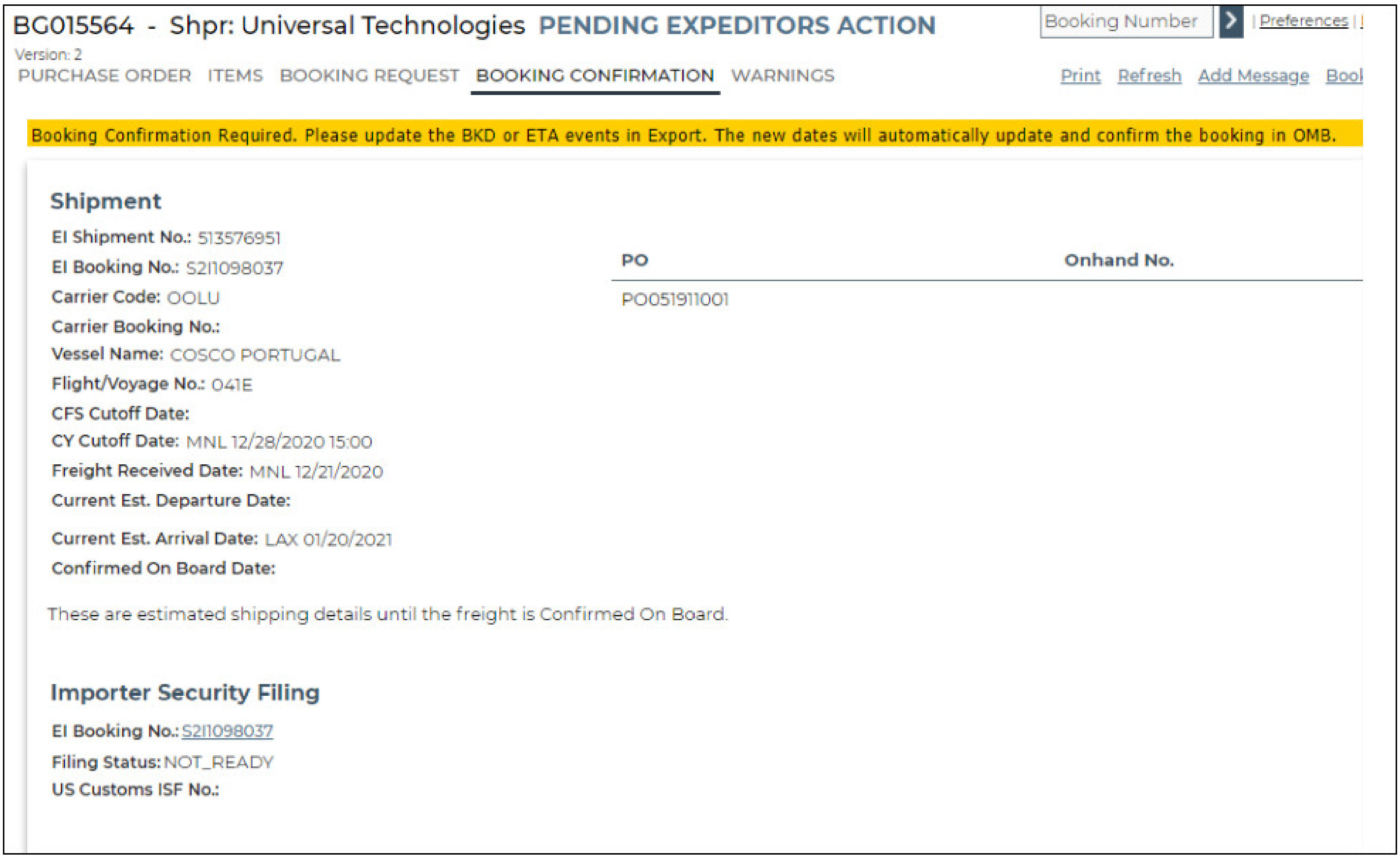


Figure 9: Booking Confirmation Tab

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 Search for more information on configuring searches.

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

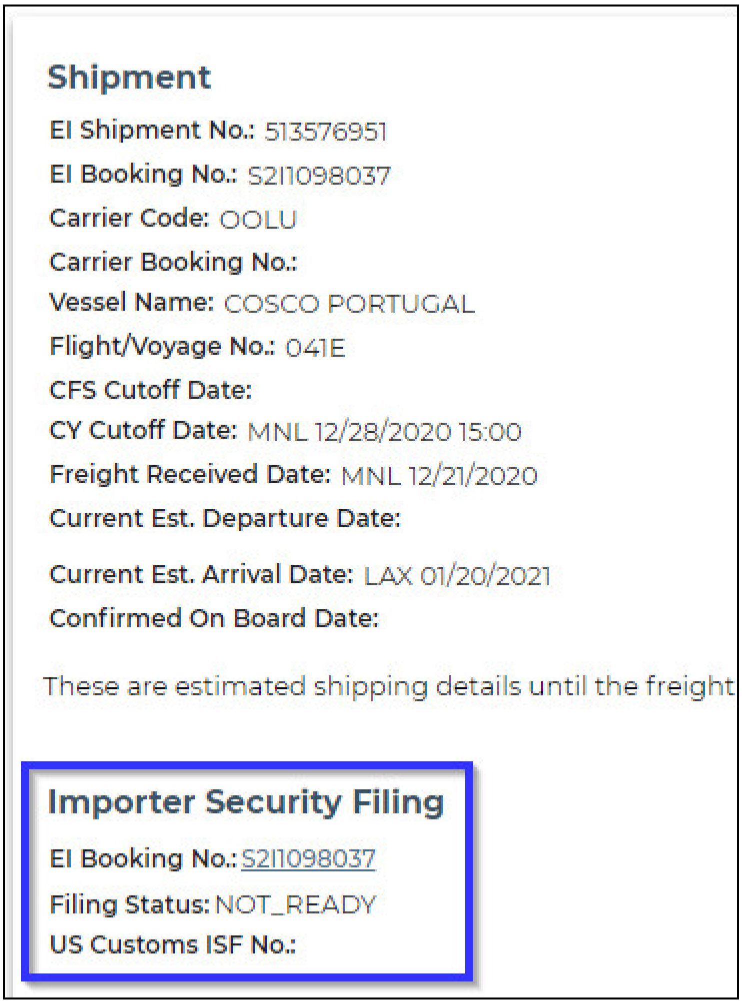


Figure 10: Booking Confirmation Tab - Importer Security Filing Section

4 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.

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

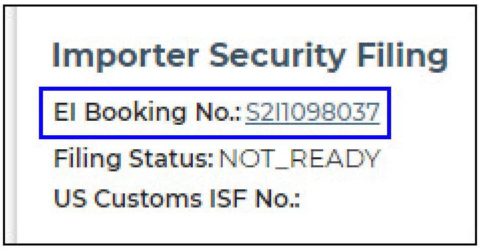


Figure 11: US Customs ISF No. Filled In

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

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.

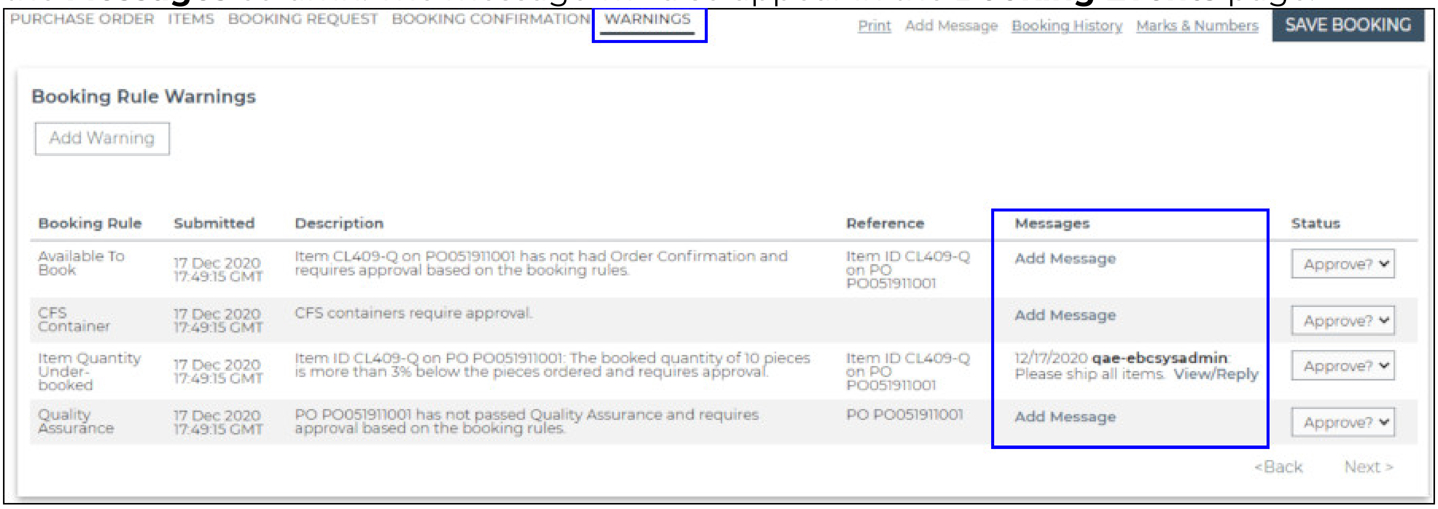


Figure 12: Warnings Tab - Add Message to Booking Rule Warning

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

- **BG015556 -** 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.
- **Shpr:Universal Technologies -** If the shipper created the booking, "Shpr" will be displayed along with the name of the shipper. If the manufacturer created the booking, "Mfr" will be displayed along with the name of the manufacturer.

- **DRAFT -** When you change the status of the booking, it will automatically display the status next to the name of the shipper or manufacturer.
- **Version: 2** - The version of the booking indicates how many times it has been reopened.

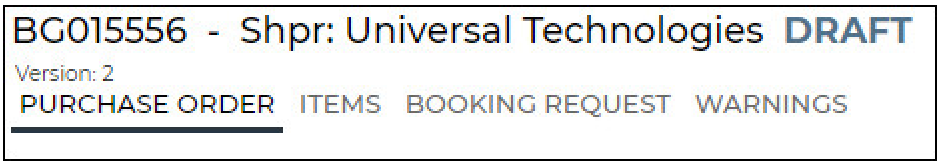


Figure 13: Tracking Number, Who Created the Booking (Mfr or Shpr), Status of Booking, and Version

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** 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 History.
You can search for specific messages by adding the **Last Message**, **Last Message Date**, or **Last Message by** fields to a Custom Search on any of the searches.

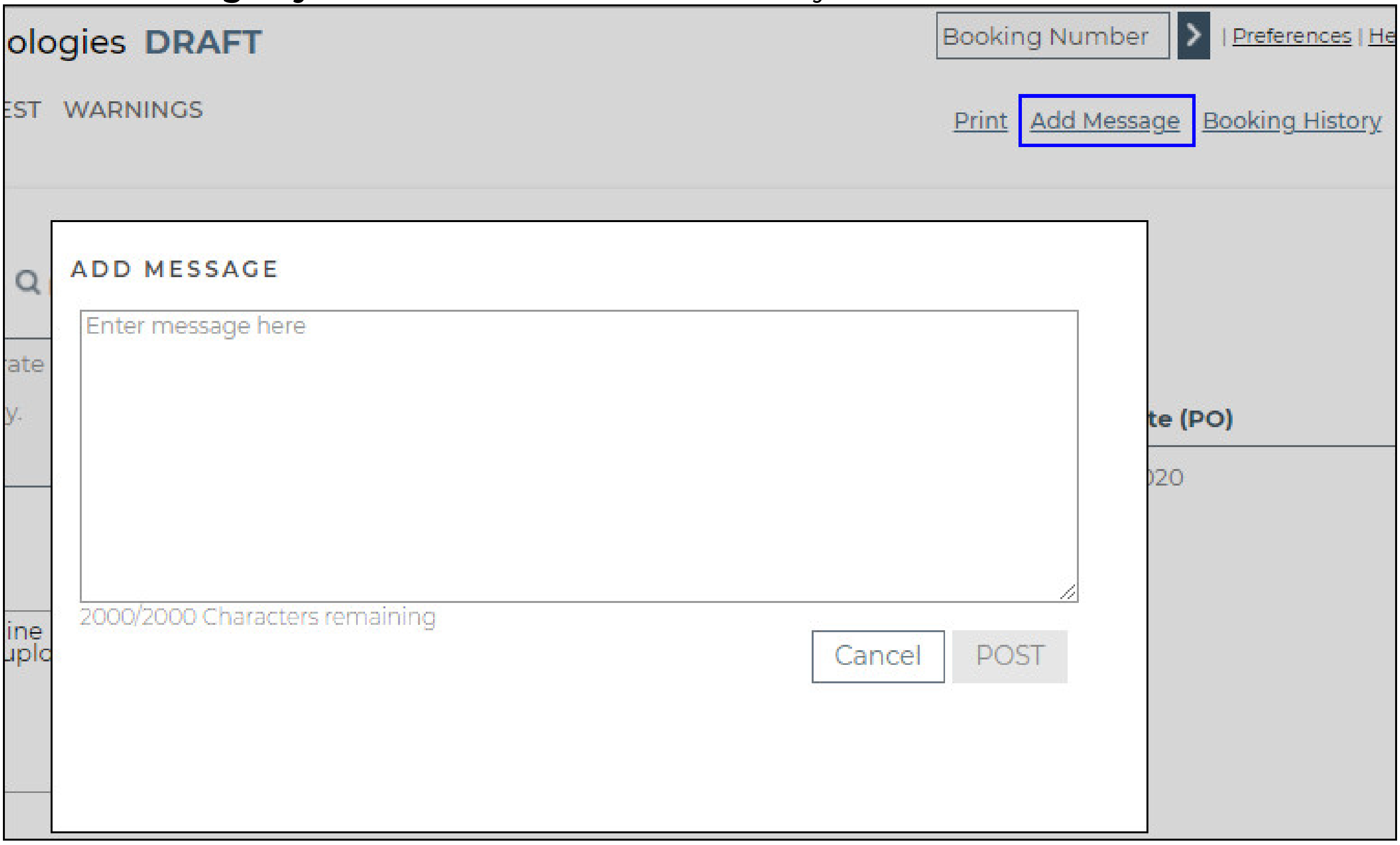


Figure 15: Add Message

Booking History

Click the **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 can be 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**.

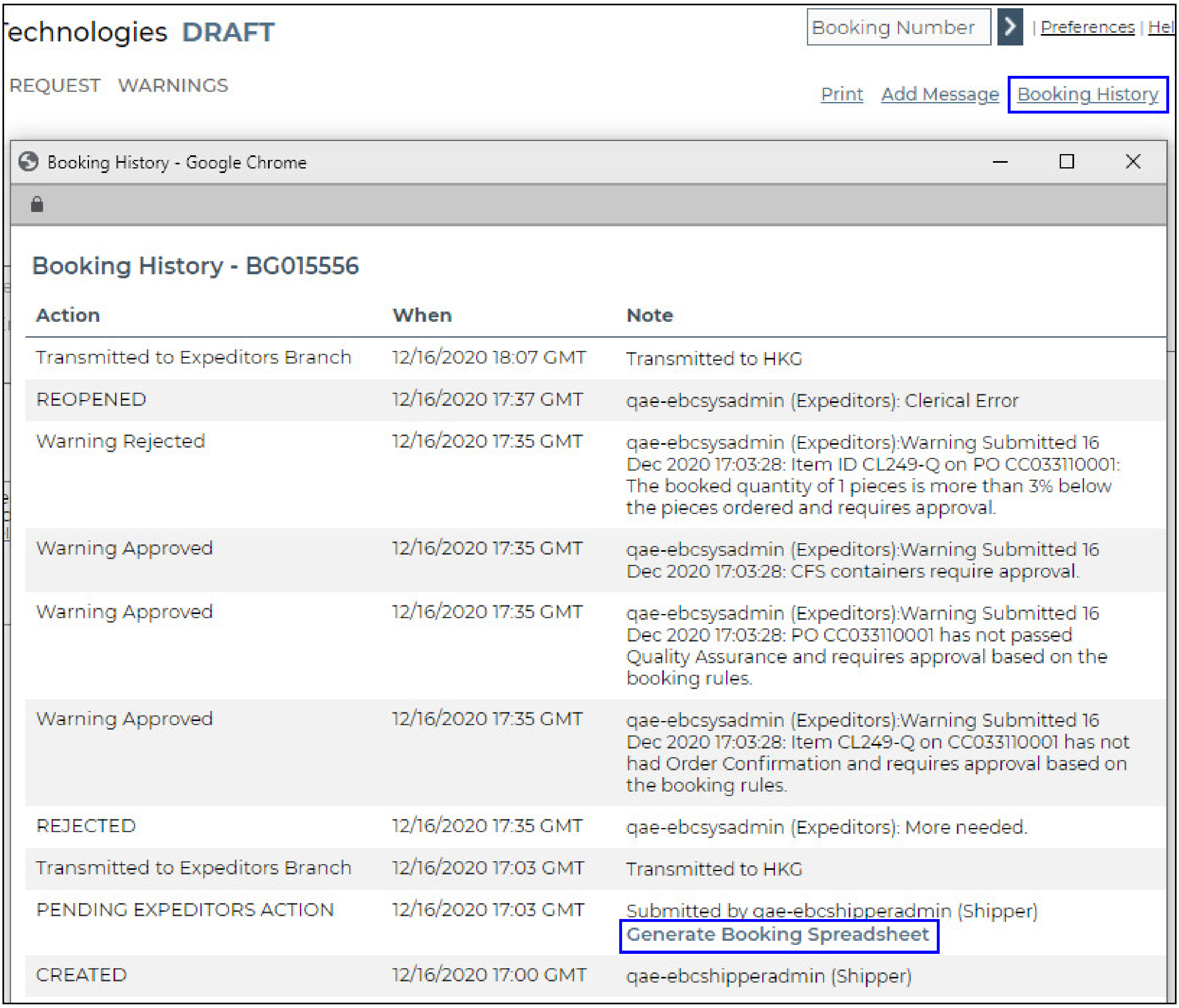


Figure 16: Booking History Pop-up Window

	A	B	C	D
1	BG015556 - Version #2			
2	Status at the time of submission: PENDING EXPEDITORS ACTION			
3	Customer: ABC Auto			
4	Shipper: Universal Technologies			
5	Submitted by: qae-ebcshipperadmin on 17-Dec-2020 19:02 GMT			
6	**Booking Details**	**Current**		**Previous (if changed)**
7	**Shipper**	dddd		
8		111 Kirkland way		
9				
10		Kirkland, Washington, 98033		
11	**Consignee**	**ABC Auto**		Cnee
12				
13				
14				
15	**Agent (Notify Party)**	agent 444		
16		13333 White houserr		
17		fffff		
18		Unknown, Virginia, 20002		
19	**Also Notify Party**	test1		
20				
21				
22				
23	**Booking Branch**	HKG		
24	**Origin Port Code**	0GA		
25	**Dest. Port Code**	1AE		
26	**Final Destination**	RIO		
27	**Shipment Type**	OCEAN		
28	**Sea-Air**	NO		
29	**Service Type**	CFS		
30	**BL Type**	**Sea Waybill to consignee & FCR to shipper**		Original BL to consignee & FCR to shipper
31	**Delivery Method**	EXPORTER_DELIVERY		
32	**Date Freight Available**	12/21/2020 08:00		
33	**Total Weight (KG)**	**100.000**		110.000
34	**Total Volume (CBM)**	**1.905**		2.096
35	**Goods**	**Current**		**Previous (if changed)**
36	**Goods Description**	Fireworks		

Figure 17: Sample Booking Spreadsheet

Marks & Numbers

Click the **Marks & Numbers** link to expand or hide the section for generating Marks & Numbers.

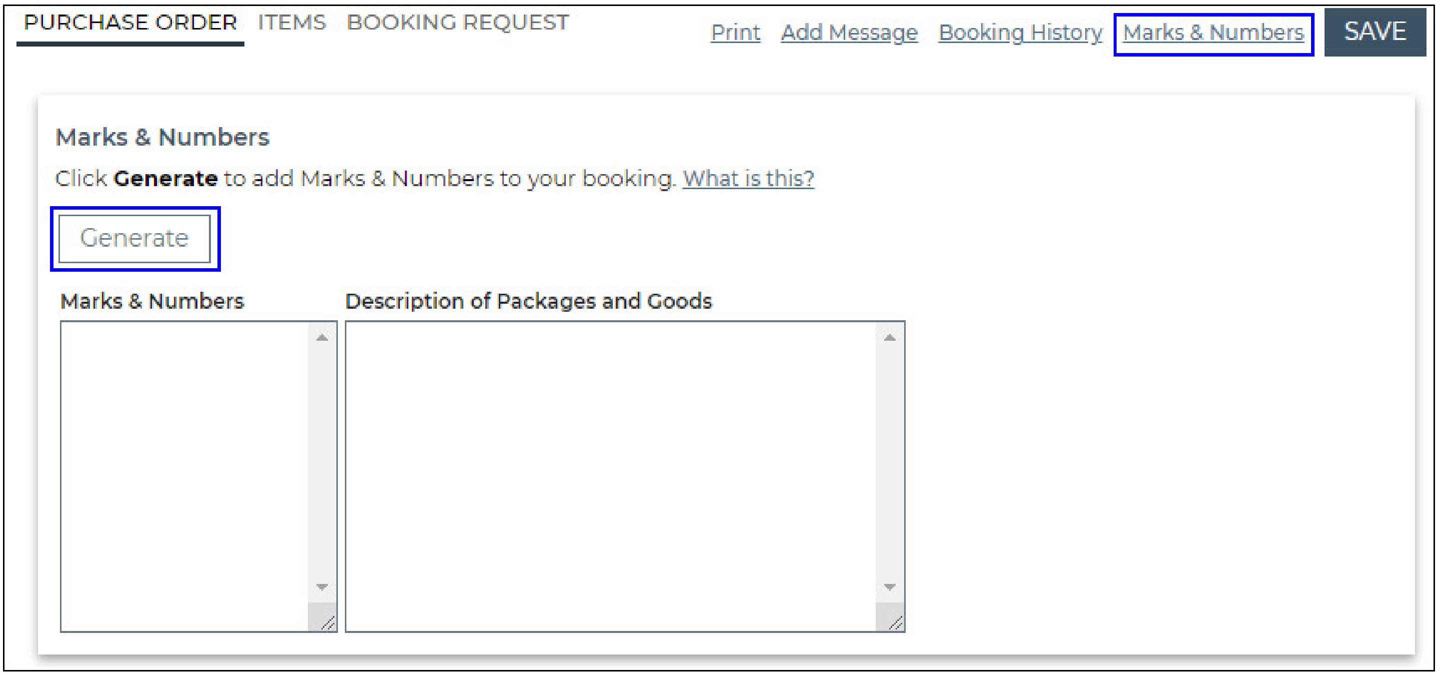


Figure 18: Marks & Numbers Expanded

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.

Tip: Click and drag the bottom right-corner of the boxes to expand them.

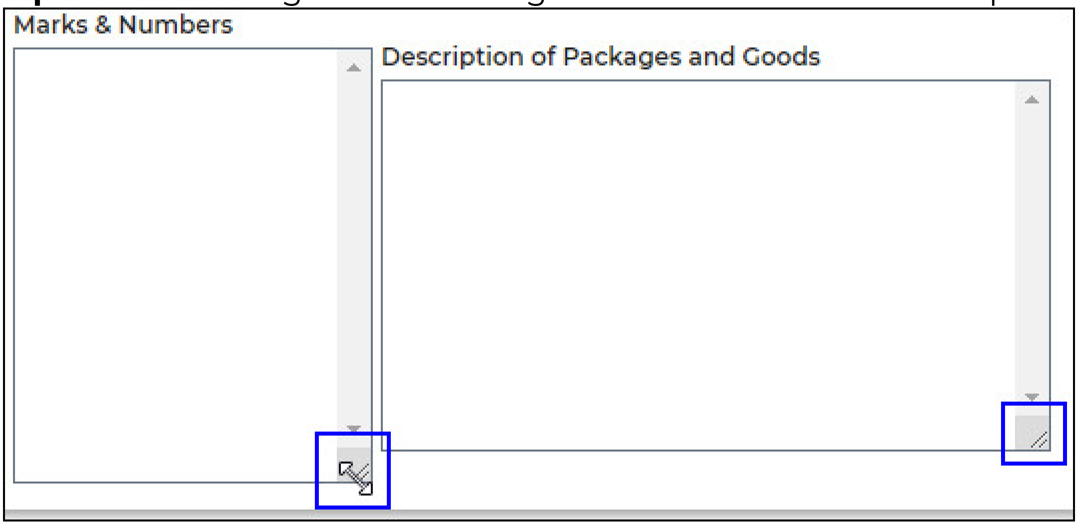


Figure 19: Click and Drag to Expand Boxes

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.

The Marks & Numbers will appear on the printed booking form:

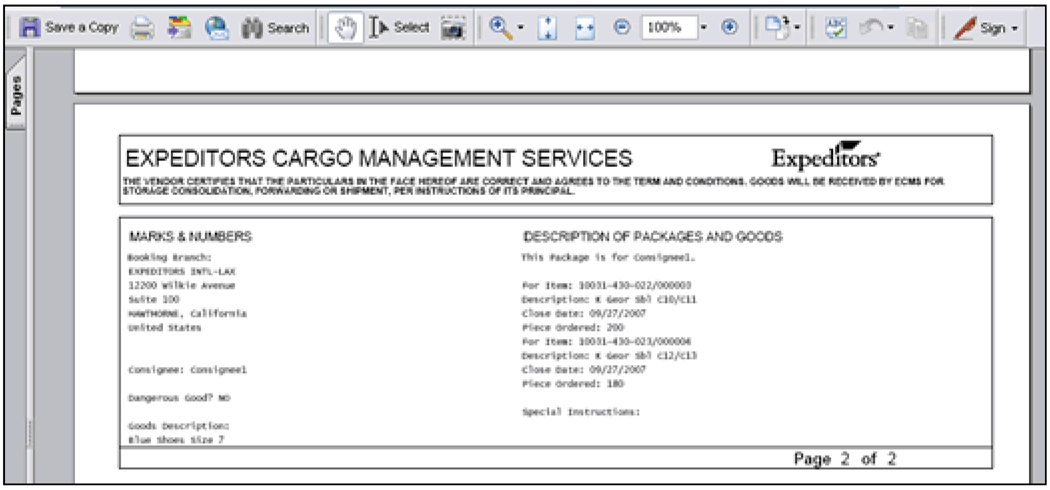


Figure 20: Page 2 of Printed Booking Form - Marks & Numbers

See Marks & Numbers for more information.

Review 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.

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

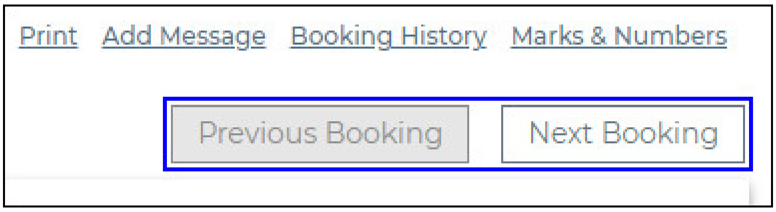
You can view multiple booking details at a time without having to perform another search or return to the **Review Bookings** page.

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.

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.

☐	Booking Number	Status	Created By Type
☐	BG015556 | Copy	PENDING EXPEDITORS ACTION	Shipper
☐	BG015562 | Copy	DRAFT	Shipper
☐	BG015564 | Copy	APPROVED	Shipper
☐	BG015565 | Copy	DRAFT	Shipper
☐	BG015555 | Copy	DRAFT	Manufacturer

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**.

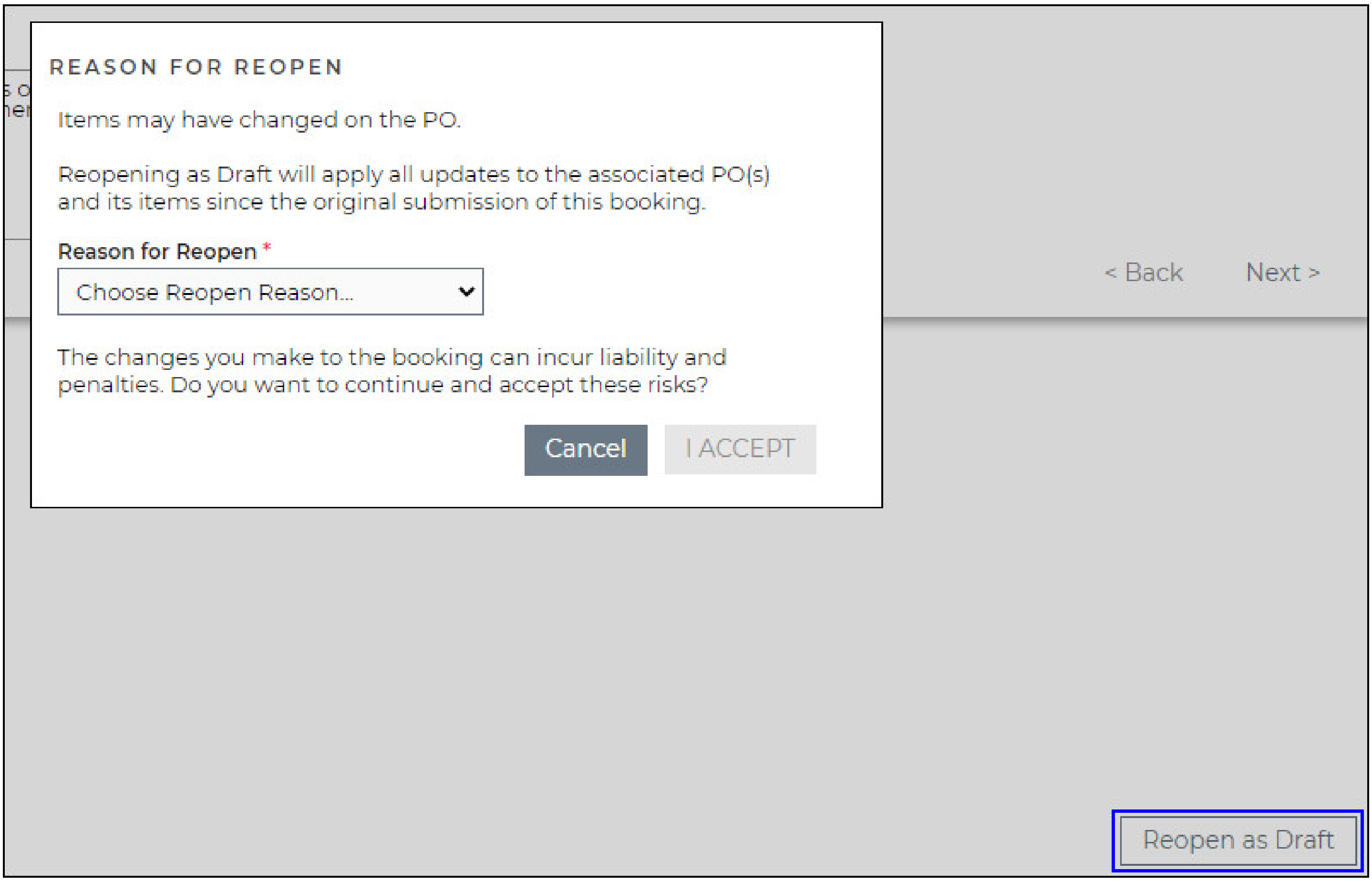


Figure 1: Reason for Reopen Pop-up Window

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

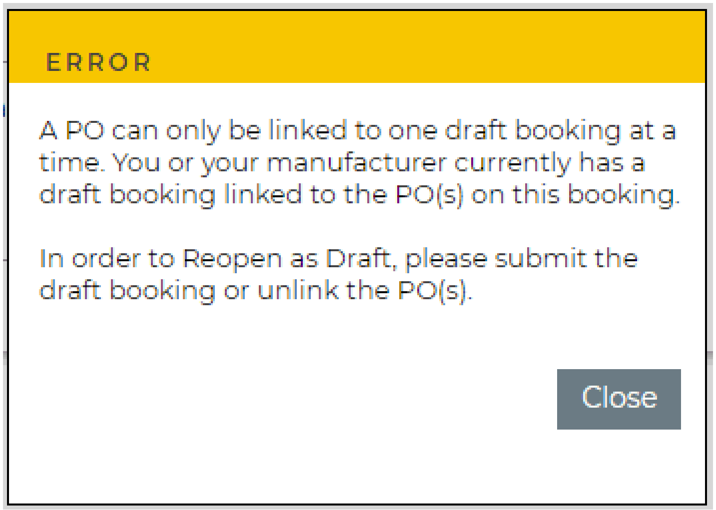


Figure 2: Error

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.

Click **Custom Search** to see saved searches and to add filters. See Using the Custom Search for more details.

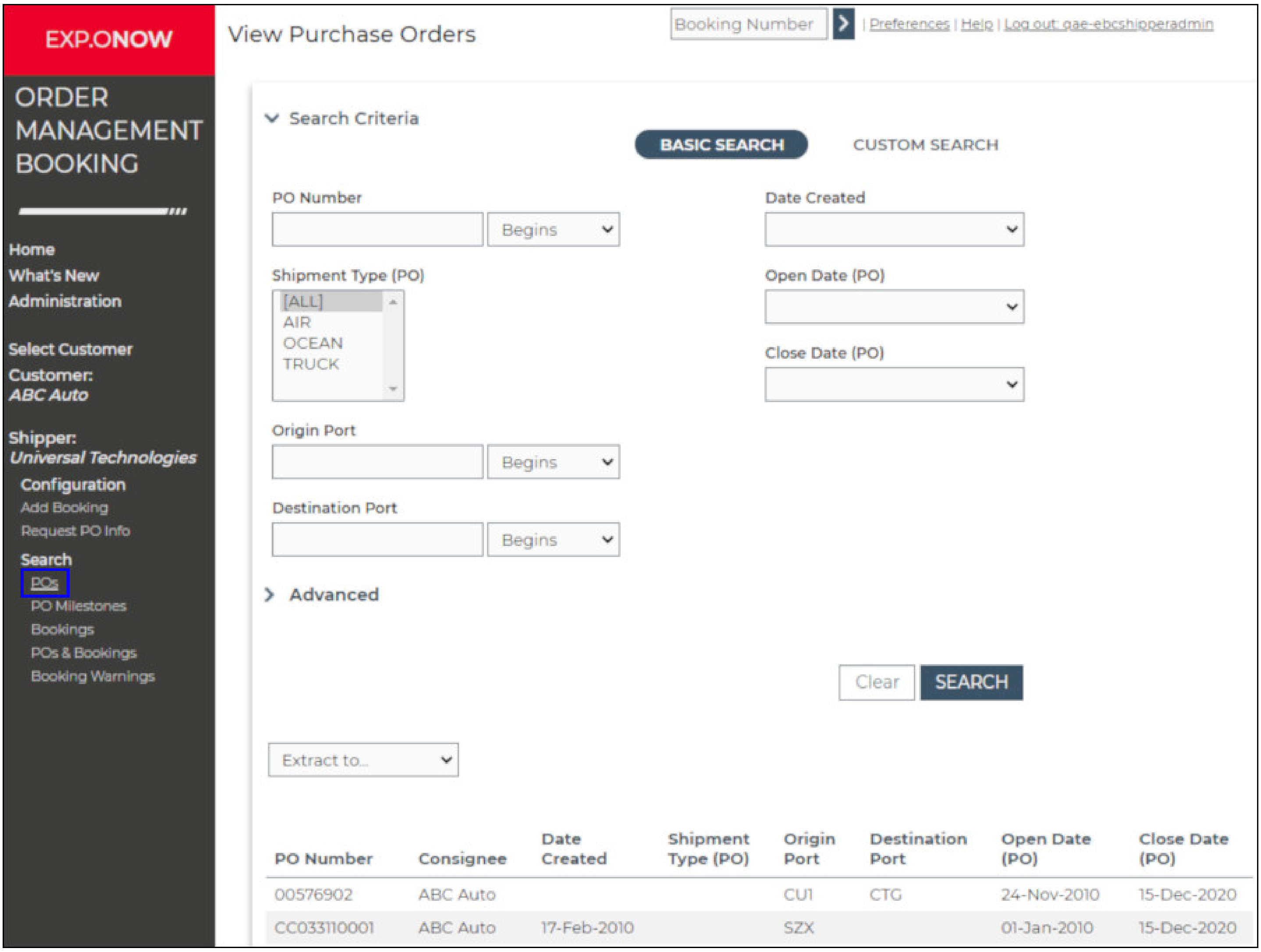


Figure 1: Shipper - Search>POs

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.

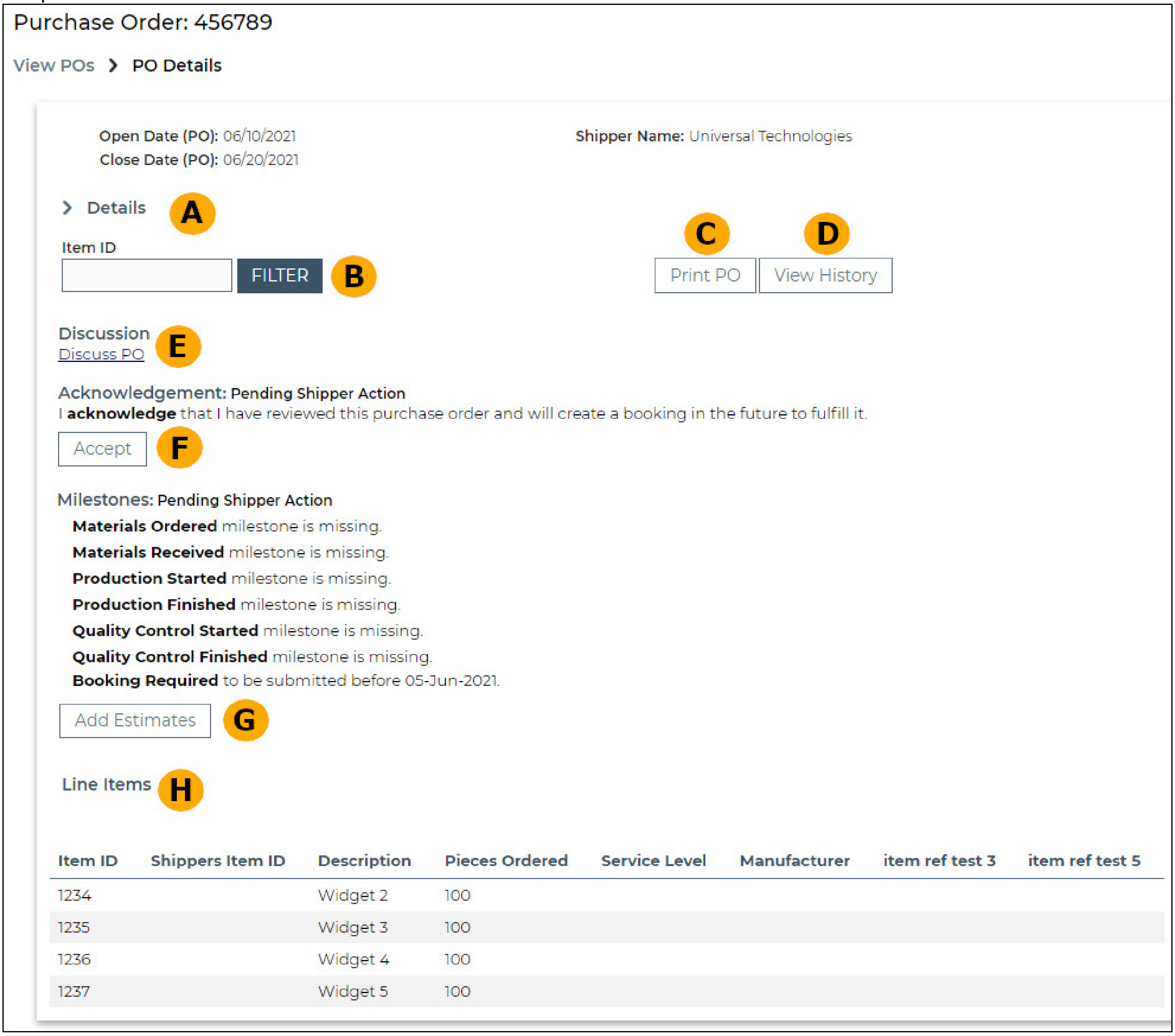


Figure 1: PO Details Page

- **A. Details**

  Click to view all of the details of the PO.

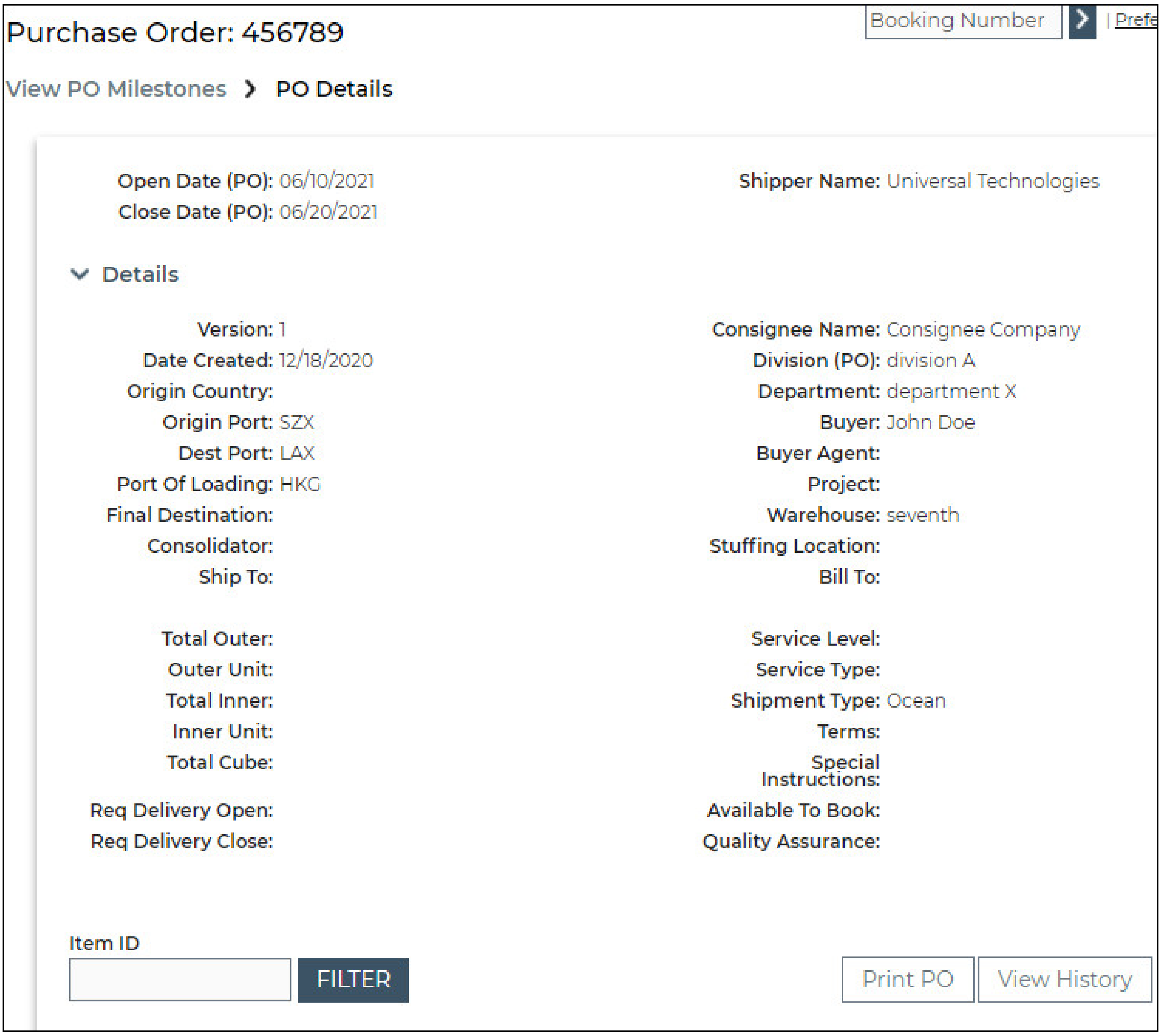


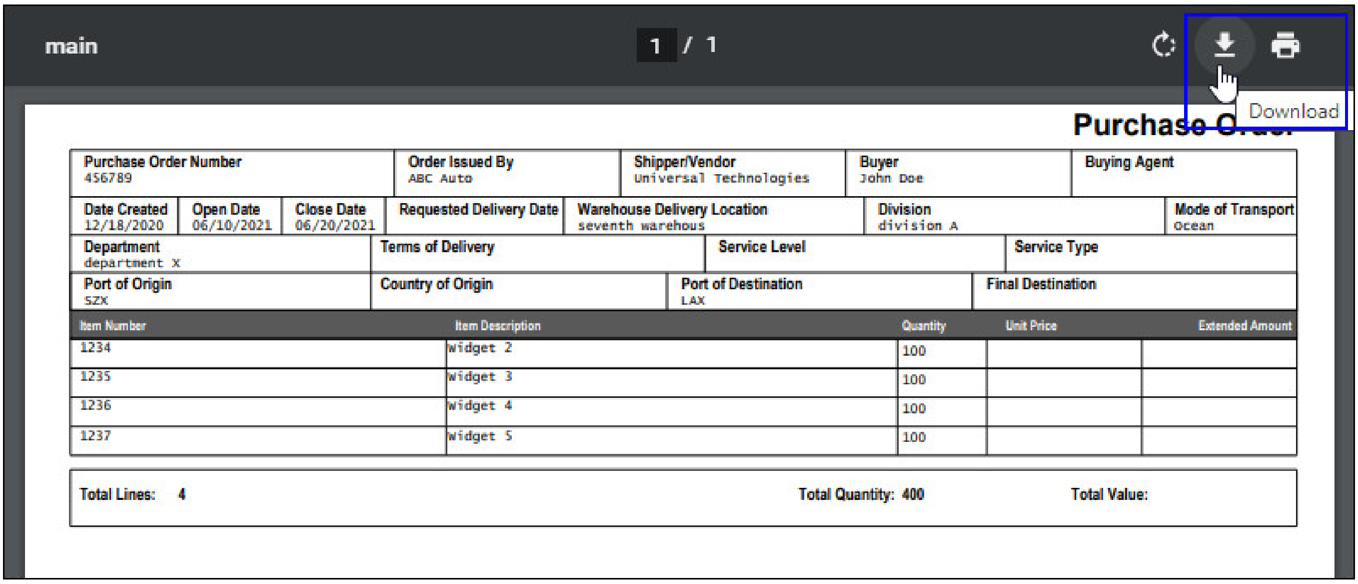
Figure 2: Expanded Details

- **B. Item ID Filter**

  The **Item ID** filter allows you to filter on the Item ID so you can find a specific line item more quickly.

- **C. Print PO**

  Click to create a PDF of the PO and its details so you can print or download it.



Purchase Order Number 456789	Order Issued By ABC Auto	Shipper/Vendor Universal Technologies	Buyer John Doe	Buying Agent

Date Created 12/18/2020	Open Date 06/10/2021	Close Date 06/20/2021	Requested Delivery Date	Warehouse Delivery Location seventh warehous	Division division A	Mode of Transport Ocean

Department department X	Terms of Delivery	Service Level	Service Type
Port of Origin SZX	Country of Origin	Port of Destination LAX	Final Destination

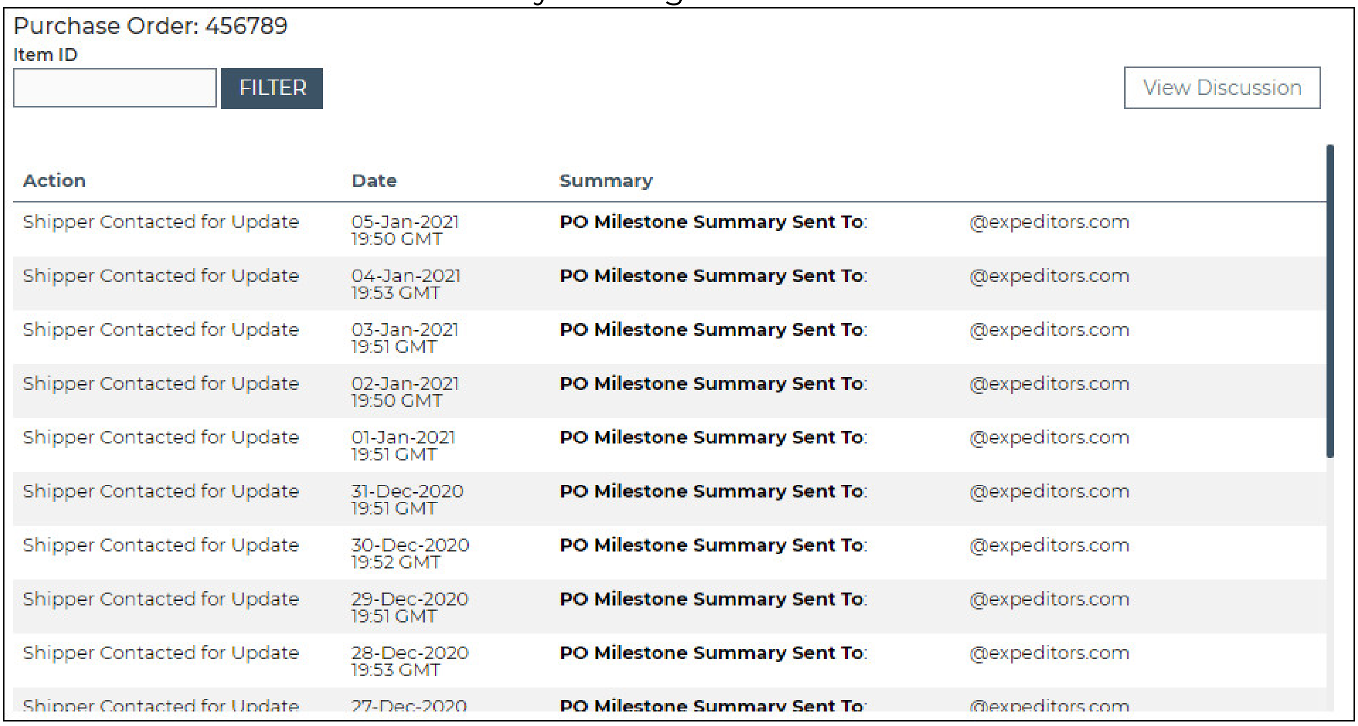
Item Number	Item Description	Quantity	Unit Price	Extended Amount
1234	Widget 2	100		
1235	Widget 3	100		
1236	Widget 4	100		
1237	Widget 5	100		

Total Lines: 4 Total Quantity: 400 Total Value:

Figure 3: Print PO

- ## D. View History

Click to view a history of actions on the PO. You can filter the history by Item ID. Click **View Discussion** to view any messages on the PO.



Action	Date	Summary	
Shipper Contacted for Update	05-Jan-2021 19:50 GMT	**PO Milestone Summary Sent To**:	@expeditors.com
Shipper Contacted for Update	04-Jan-2021 19:53 GMT	**PO Milestone Summary Sent To**:	@expeditors.com
Shipper Contacted for Update	03-Jan-2021 19:51 GMT	**PO Milestone Summary Sent To**:	@expeditors.com
Shipper Contacted for Update	02-Jan-2021 19:50 GMT	**PO Milestone Summary Sent To**:	@expeditors.com
Shipper Contacted for Update	01-Jan-2021 19:51 GMT	**PO Milestone Summary Sent To**:	@expeditors.com
Shipper Contacted for Update	31-Dec-2020 19:51 GMT	**PO Milestone Summary Sent To**:	@expeditors.com
Shipper Contacted for Update	30-Dec-2020 19:52 GMT	**PO Milestone Summary Sent To**:	@expeditors.com
Shipper Contacted for Update	29-Dec-2020 19:51 GMT	**PO Milestone Summary Sent To**:	@expeditors.com
Shipper Contacted for Update	28-Dec-2020 19:53 GMT	**PO Milestone Summary Sent To**:	@expeditors.com
Shipper Contacted for Update	27-Dec-2020	**PO Milestone Summary Sent To**:	@expeditors.com

Figure 4: PO History

- ## E. 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.

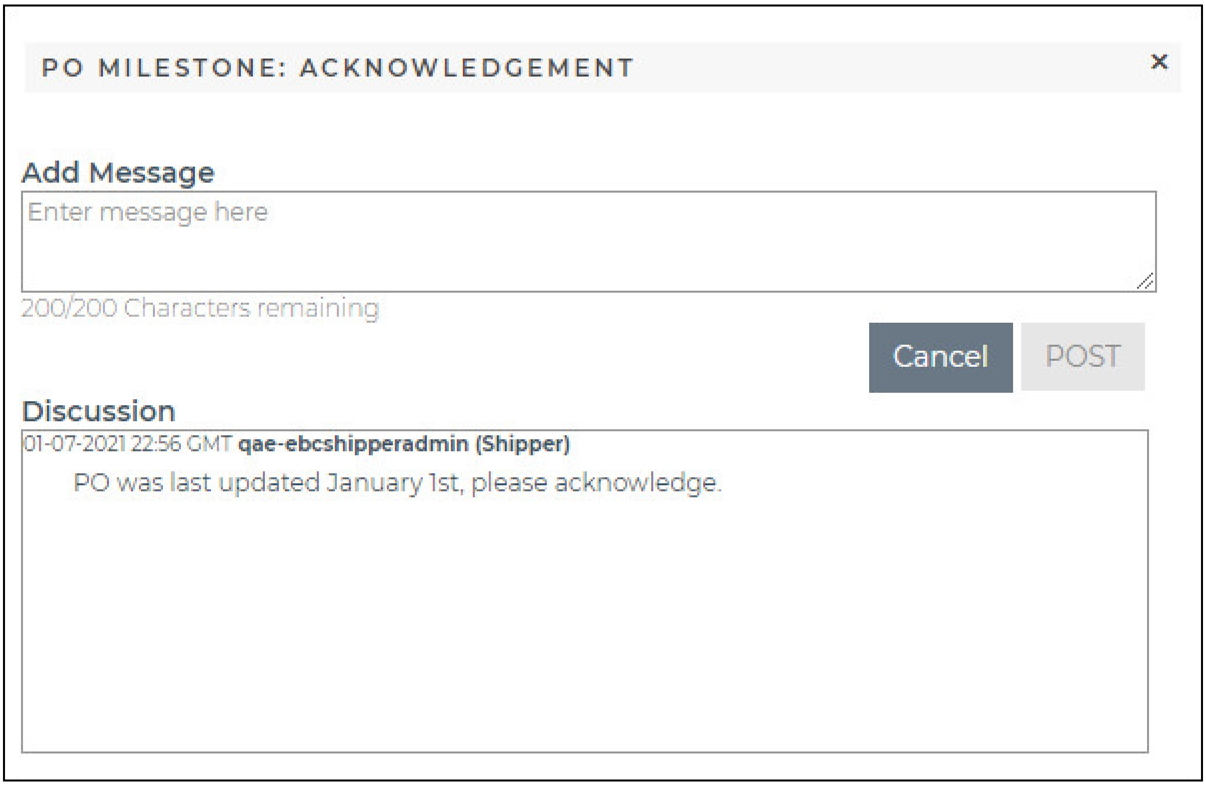


Figure 5: Discussion

- **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.

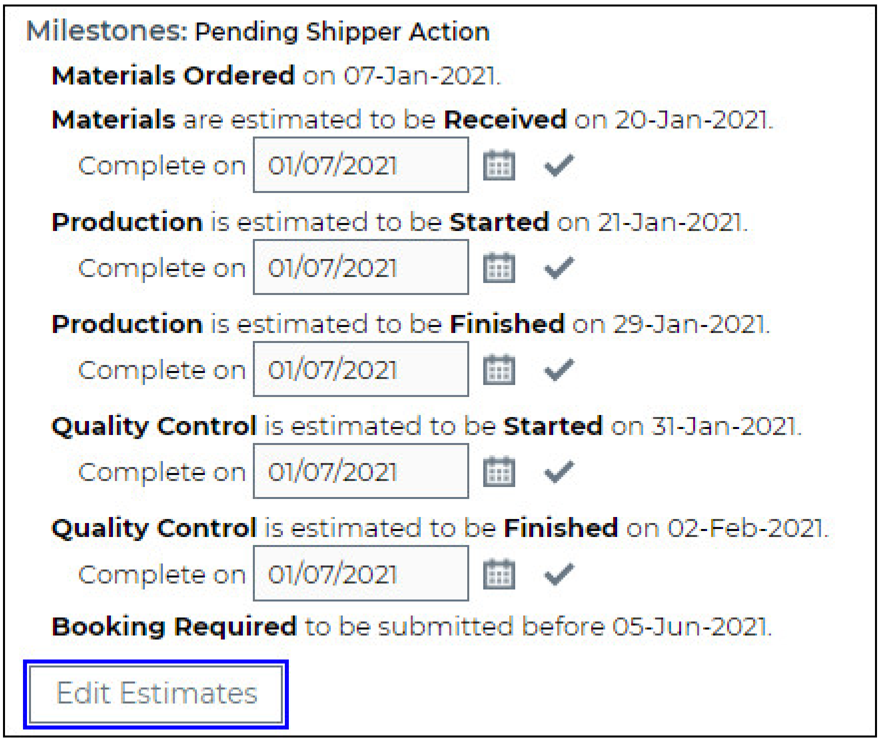


Figure 6: Milestones - Add or Edit Estimates

- ### 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.

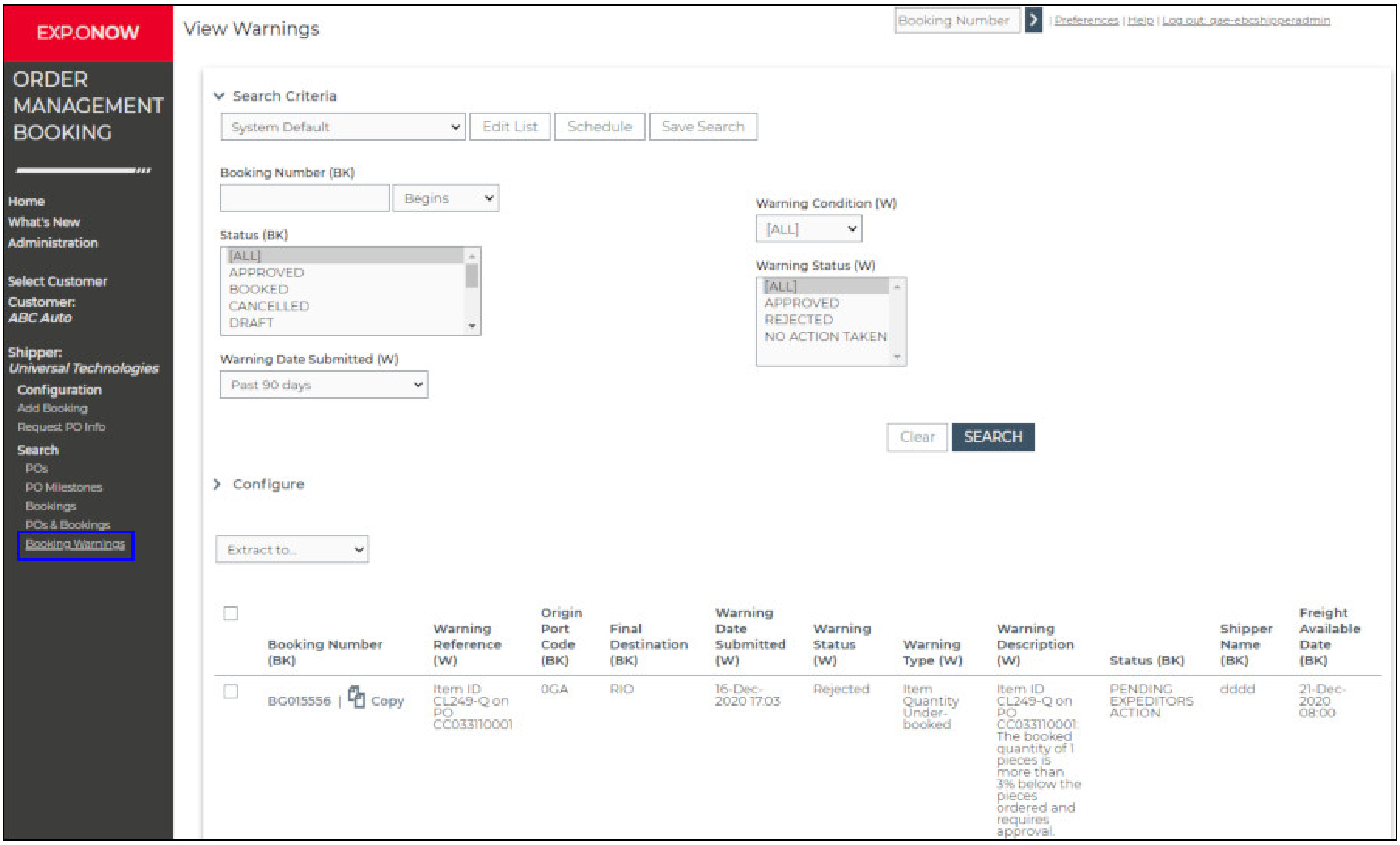


Figure 1: Booking Warnings - Shipper View

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.

2 You can save and configure your search criteria. See Using the Custom Search 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 Search Feature

The Custom Search 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 Search feature also gives you the ability to add additional fields to the search criteria and add additional fields to view in the results.

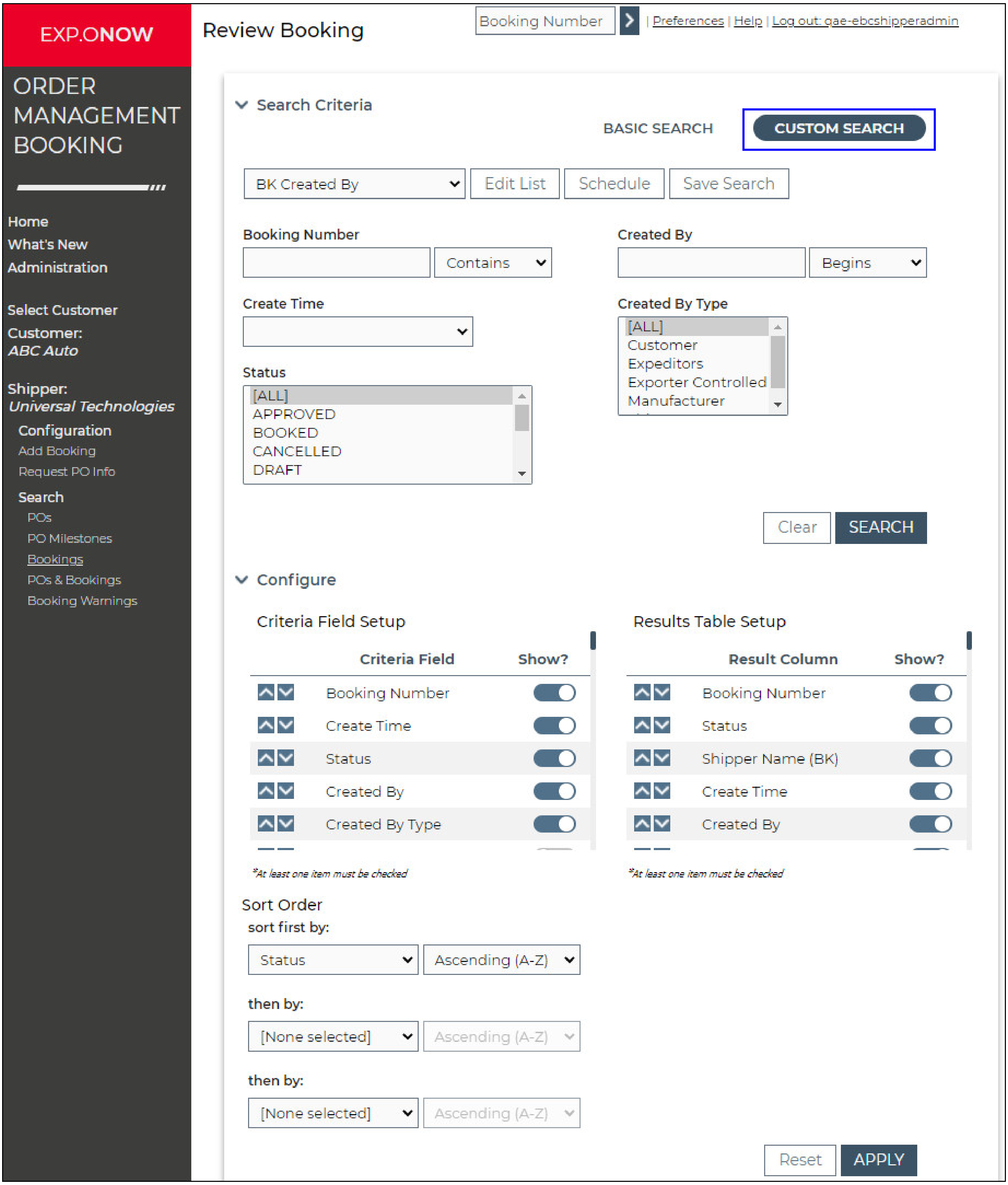


Figure 1: Custom Search and Configure Section

To use the Custom Search feature:

1 Click a search link under the Search section of the left navigation and then click the **Custom Search** link in the upper right corner. If there is no Custom Search 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 select to **Show?** 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 to **Show** the **Current Est. Departure Date** in the **Results Table Setup**. The booking results will show the **Current Est. Departure Date** field.

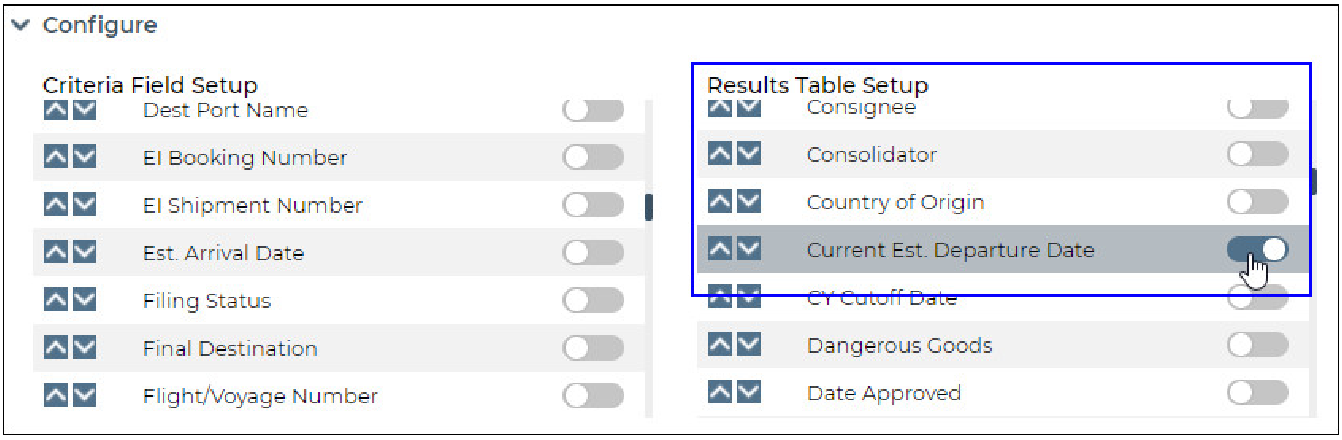


Figure 2: Results Table Setup

4 Click **Apply** once you have made your configurations.

5 Once you have configured the search, click **Save Search** at the top of the page.

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.

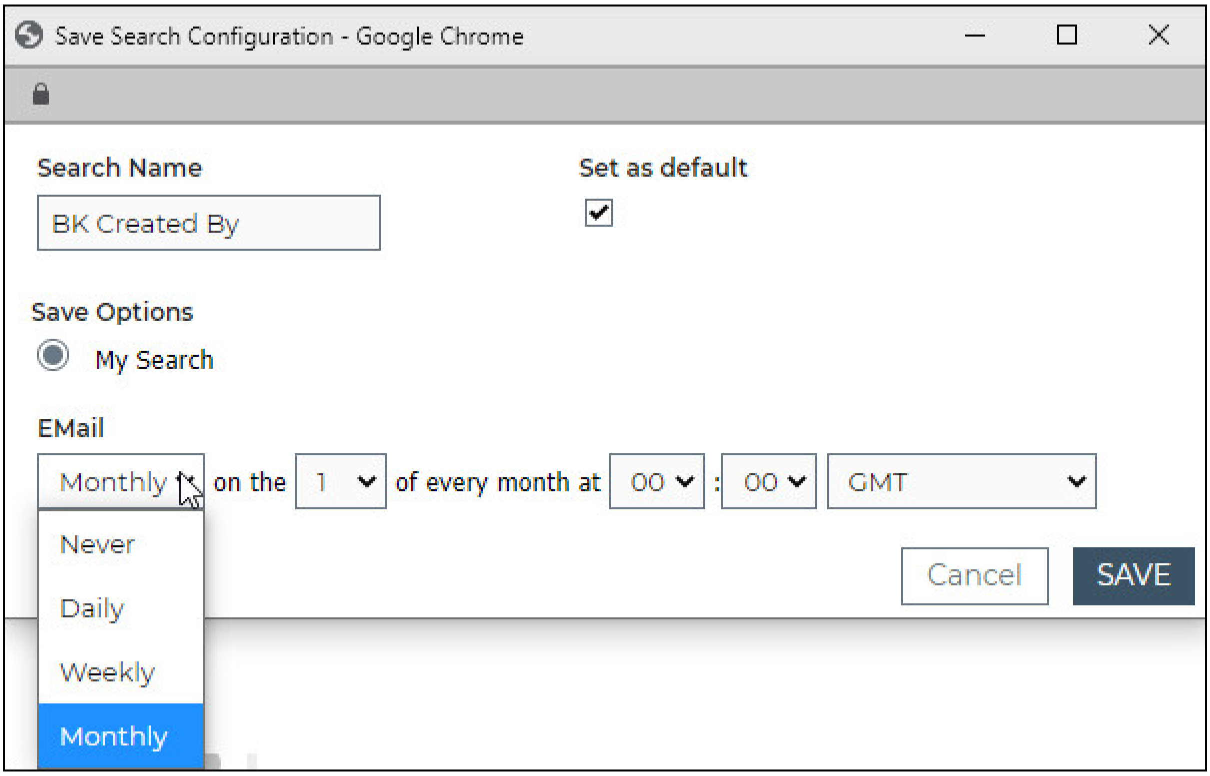


Figure 3: Save Search Configuration Pop-up Window

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

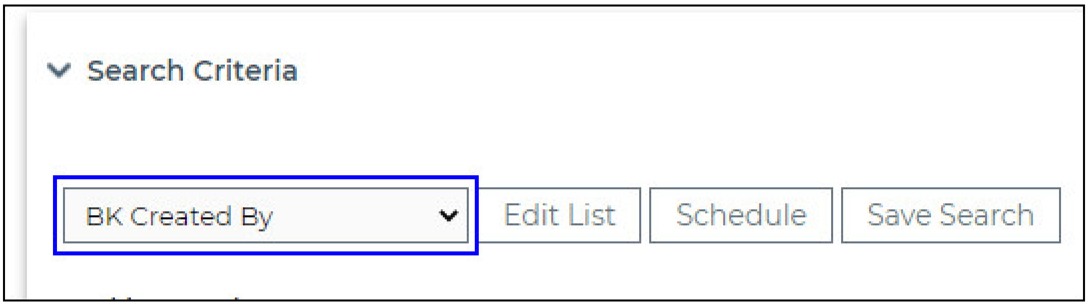


Figure 4: Custom Search Drop-down List

8 You can click **Schedule** to bring up the **Save Search Configuration** pop-up window again to make changes. Click **Edit List** to delete or change the default of saved searches.

Marks & Numbers

Marks & Numbers help make your workflow more efficient by automating the generation of the Marks and Numbers section into the printed booking form.

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

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 Marks & Numbers in your booking and then click Generate.

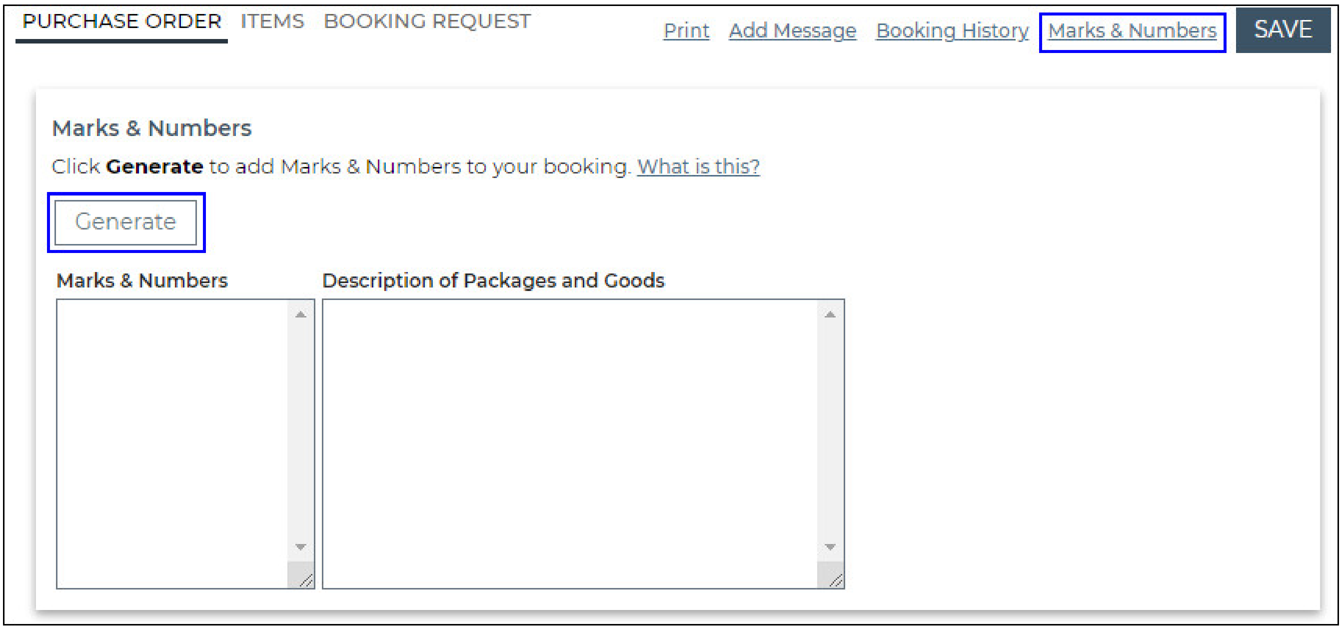


Figure 1: Marks & Numbers Section

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.

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.

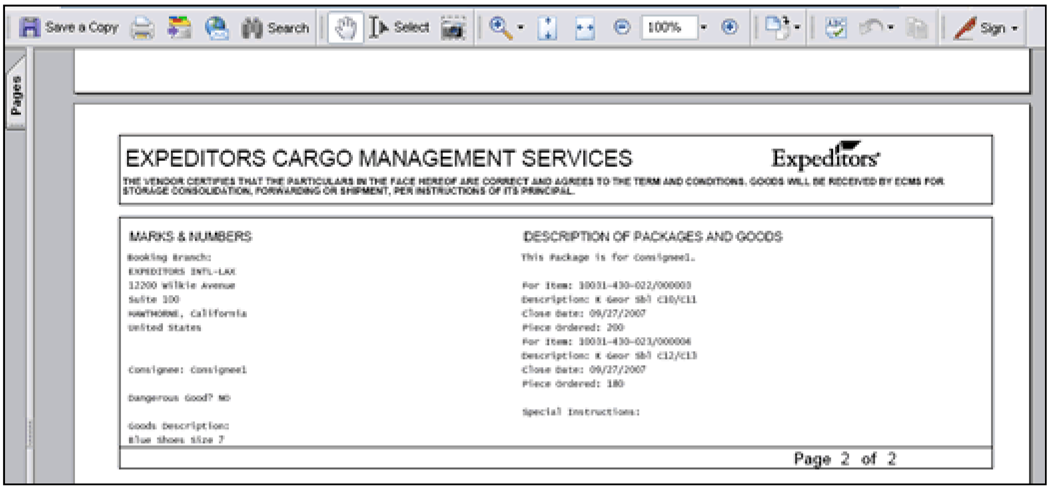


Figure 2: Marks & Numbers on Printed Booking Form Page 2

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.

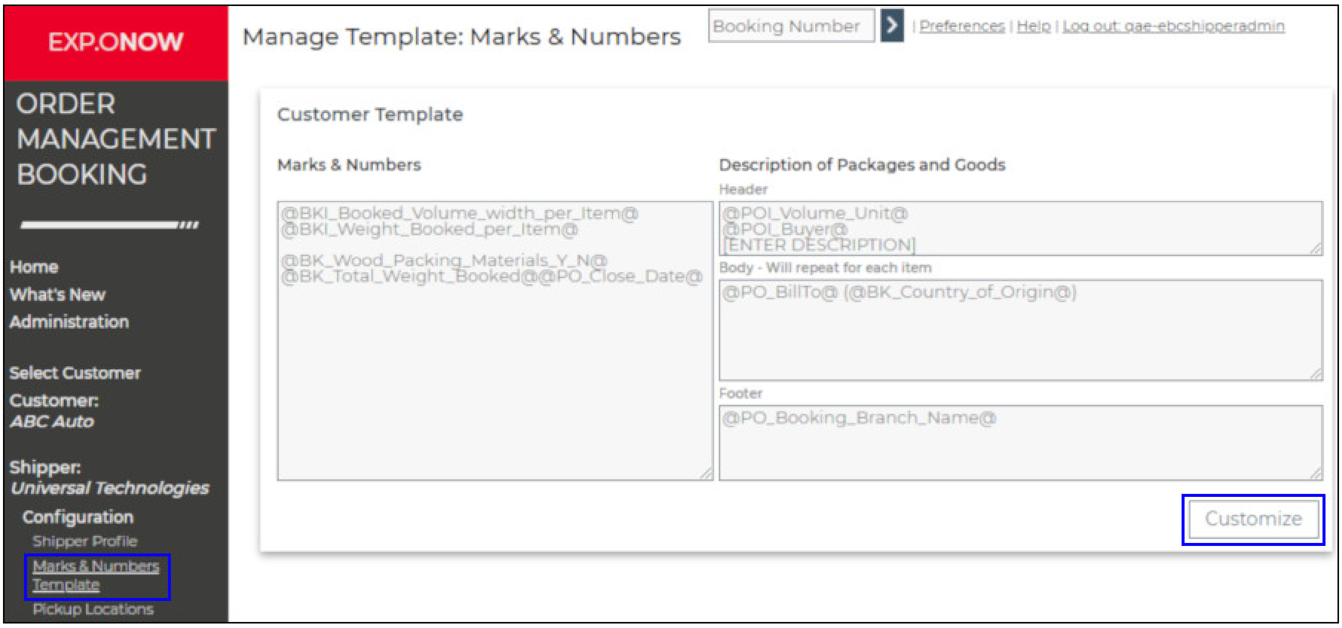


Figure 4: Shipper - Marks & Numbers Template Link

3 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 a blank template.

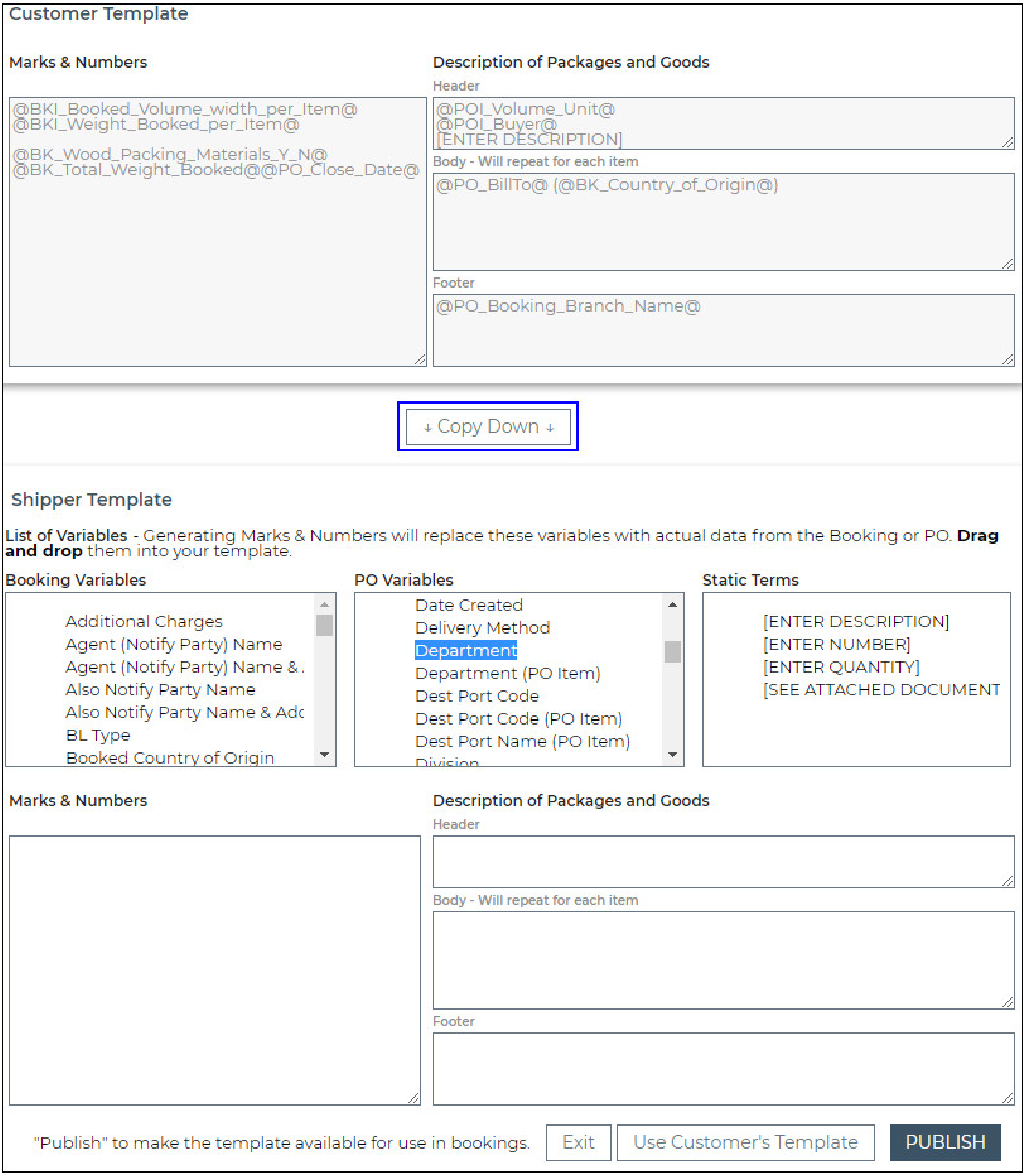


Figure 6: Creating a Shipper Marks & Numbers Template

4 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:

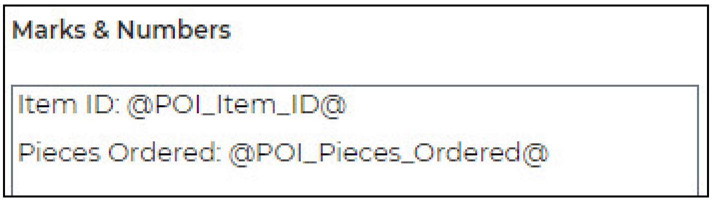
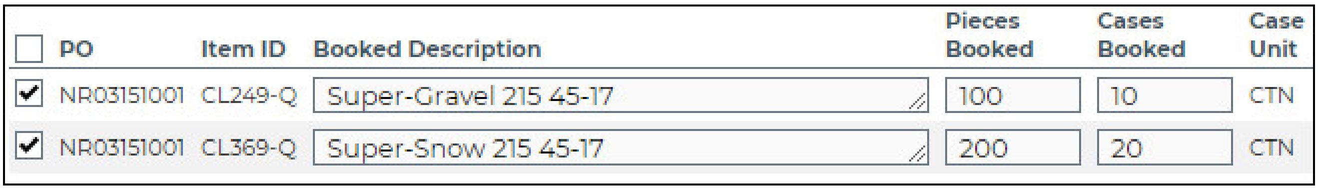


Figure 7: PO Variables

And you generated the Marks & Numbers in a booking that had the following information:



	PO	Item ID	Booked Description	Pieces Booked	Cases Booked	Case Unit
☑	NR03151001	CL249-Q	Super-Gravel 215 45-17	100	10	CTN
☑	NR03151001	CL369-Q	Super-Snow 215 45-17	200	20	CTN

Figure 8: Booking Information

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

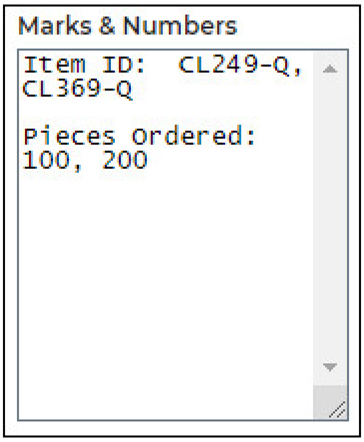


Figure 9: Generated Marks & Numbers

5 Note 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.

6 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_Booked_per_Item@

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:

☐	PO	Item ID	Booked Description	Pieces Booked	Cases Booked	Case Unit
☑	NR03151001	CL249-Q	Super-Gravel 215 45-17	100	10	CTN
☑	NR03151001	CL369-Q	Super-Snow 215 45-17	200	20	CTN

Goods Details

Goods Description *

Tires and Other Car Parts

Dangerous Goods *

No

Figure 11: Booking Information

The generated Marks & Numbers would be:

Description of Packages and Goods

```
Tires and Other Car Parts

PO #: NR03151001
Item #: CL249-Q  Pieces: 100
PO #: NR03151001
Item #: CL369-Q  Pieces: 200

Dangerous Goods? NO
```

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

7 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.

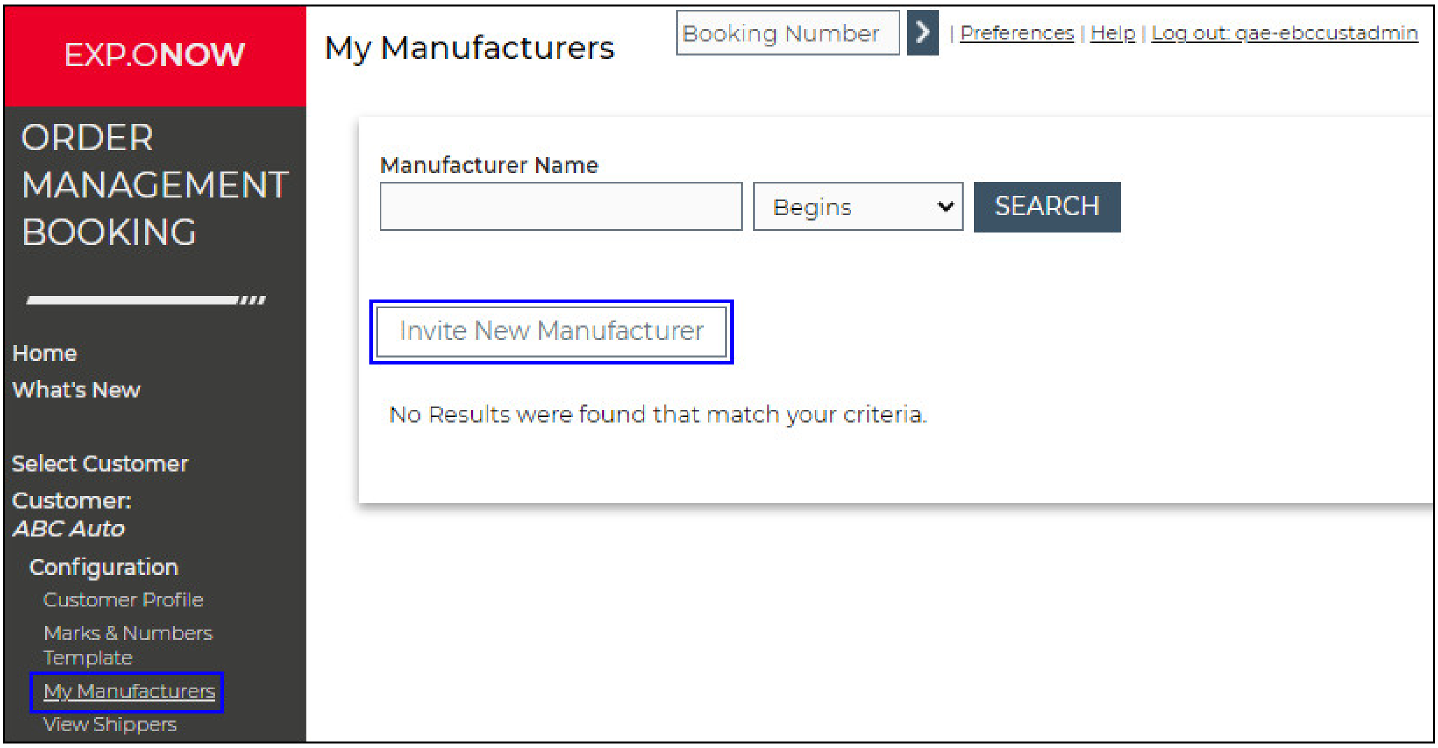


Figure 1: My Manufacturers

To invite a new manufacturer:

1 Click Configuration, then My Manufacturers from the left navigation menu.

2 Click **Invite New Manufacturer**.

3 Enter the **Manufacturer name**, this is the name of the manufacturer company.

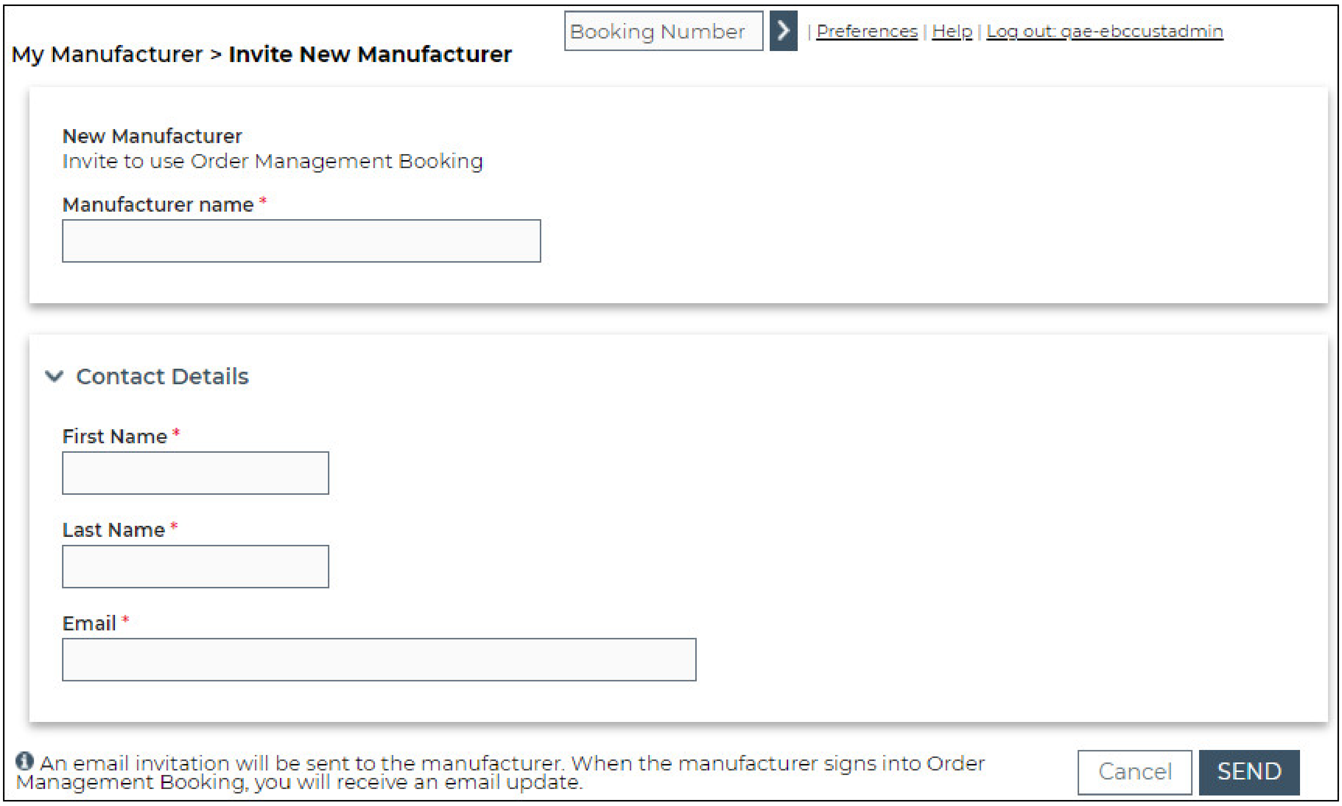


Figure 2: Invite New Manufacturer Page

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.

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.

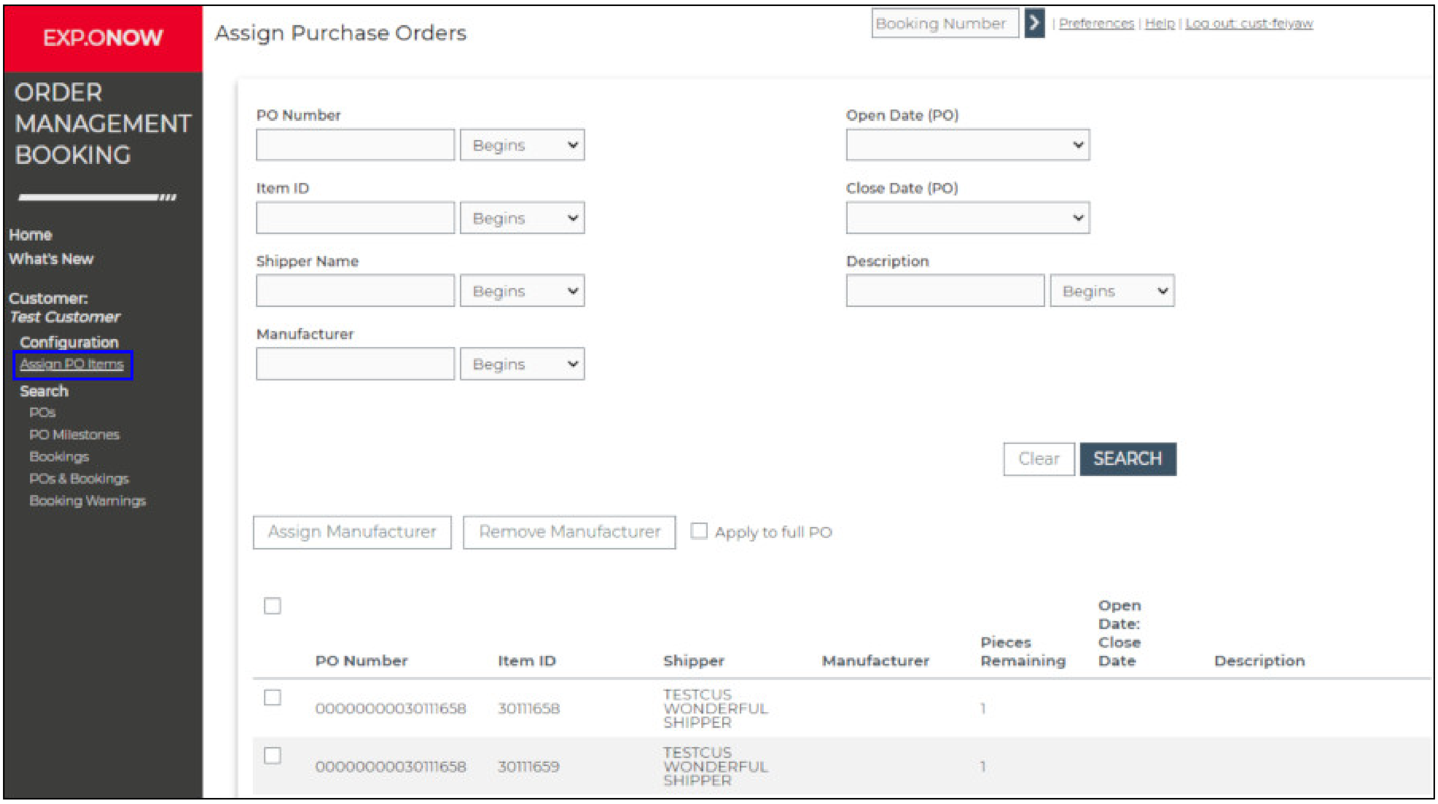


Figure 1: Assign PO Items

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.

> **Note:** If **Apply to full PO** is selected and cannot be unselected, this is a setting that has been turned

on in the Customer Profile. Please contact your Expeditors Account Representative if you want this to be turned off.

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.

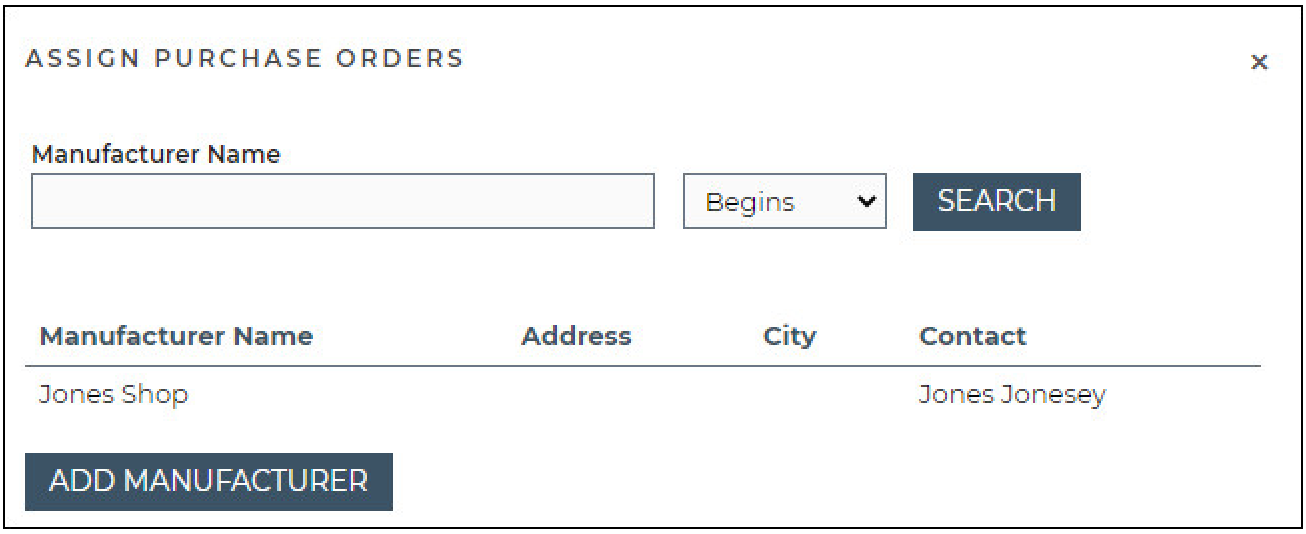


Figure 2: Assign Purchase Orders Pop-up Window

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 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.

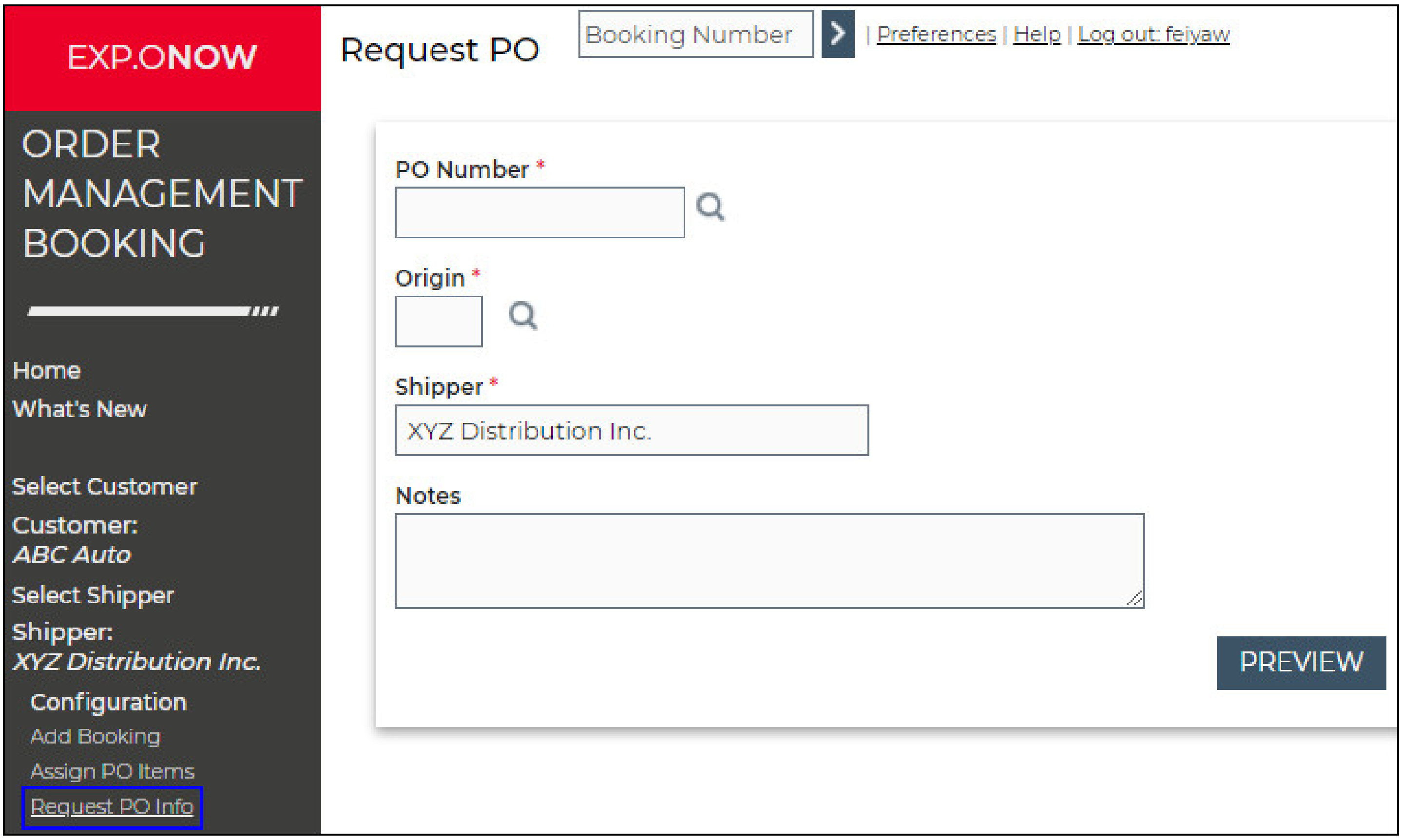


Figure 1: Shipper - Request PO Page

The email address entered in the **Contact** section of your Shipper Profile will be used.