

Order Management Bookings Help - Shippers

Table of Contents

Printed Shippers Help Overview 3

Changing Your Password..... 4

Navigation..... 7

Configuring Your User Preferences 9

Configuring Your Shipper Profile..... 11

Adding Pickup Locations 14

Adding Letters of Credit..... 17

Adding Bookings 19

Review Bookings..... 38

Copy a Booking 40

Updating a Booking..... 42

POs..... 44

PO Details..... 45

Booking Warnings..... 50

Using the Custom Search 52

Marks & Numbers 56

Invite Manufacturers 63

Assign PO Items 66

Requesting POs..... 68

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

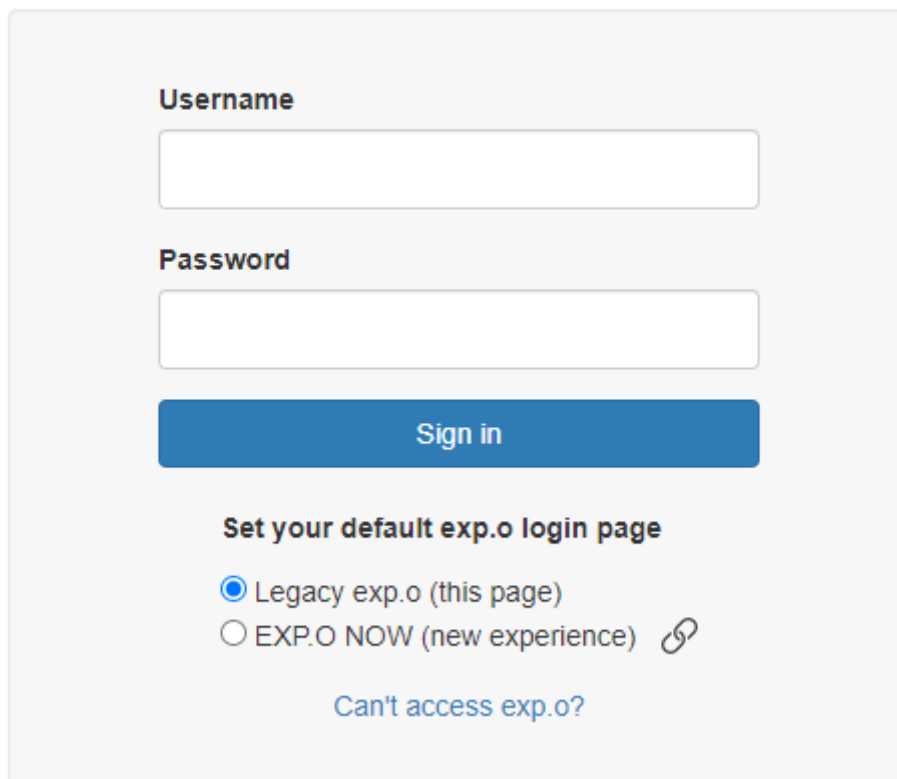

If you have general questions or issues with OMB, please contact your Expeditors Account Manager.

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) (<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.



The image shows the exp.o Legacy Login Page. It features the exp.o logo at the top. Below the logo is a login form with two input fields: 'Username' and 'Password'. Below these fields is a blue 'Sign in' button. Under the button, there is a section titled 'Set your default exp.o login page' with two radio button options: 'Legacy exp.o (this page)' (which is selected) and 'EXP.O NOW (new experience)'. A link icon is next to the second option. At the bottom of the form is a link that says 'Can't access exp.o?'.

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.

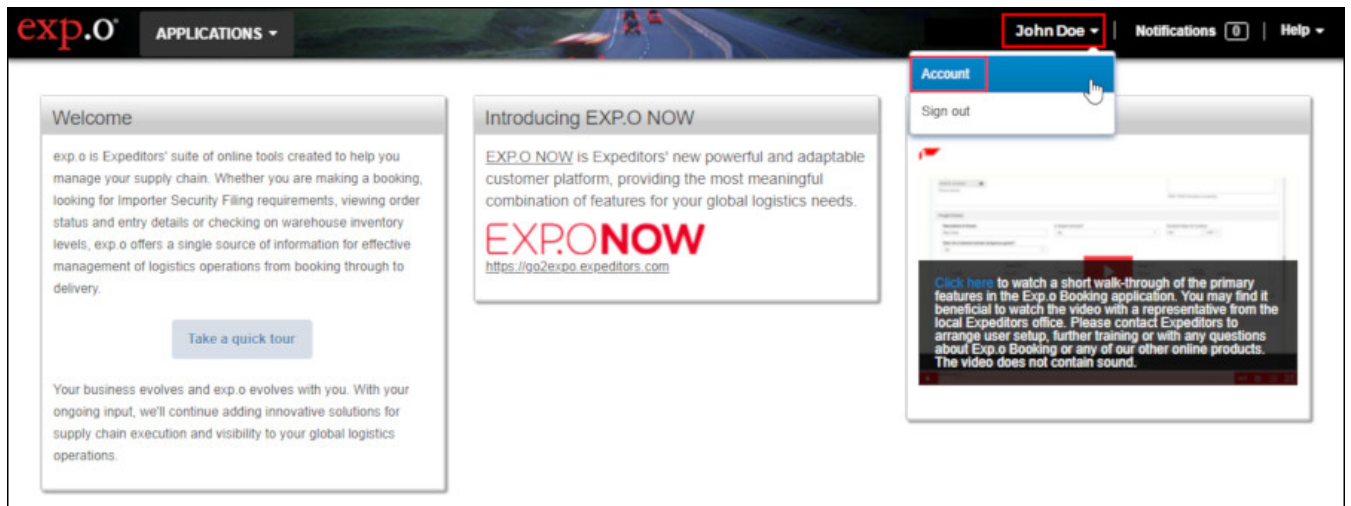


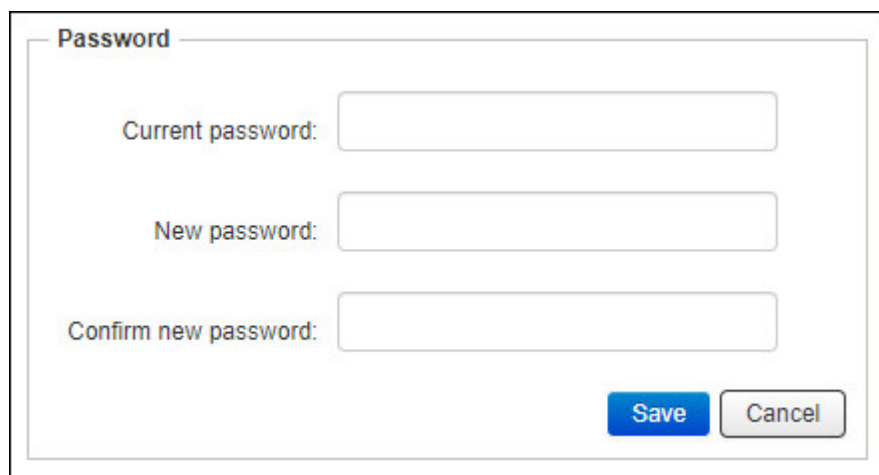
Figure 2: Username>Account

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

The screenshot shows the exp.o Account pop-up window. It has a header with the exp.o logo. Below the header, there are three sections: 'Name', 'Email', and 'Password'. The 'Name' section shows 'John Doe' with an 'Edit' link. The 'Email' section shows 'john.doe@expeditors.com' with a 'Request update to email address' link. The 'Password' section has a 'Change Password' link highlighted with a red box.

Figure 3: Change Password

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



The image shows a web form titled "Password" with a light gray border. Inside the form, there are three text input fields stacked vertically. The first field is labeled "Current password:", the second is labeled "New password:", and the third is labeled "Confirm new password:". At the bottom right of the form, there are two buttons: a blue "Save" button and a gray "Cancel" button.

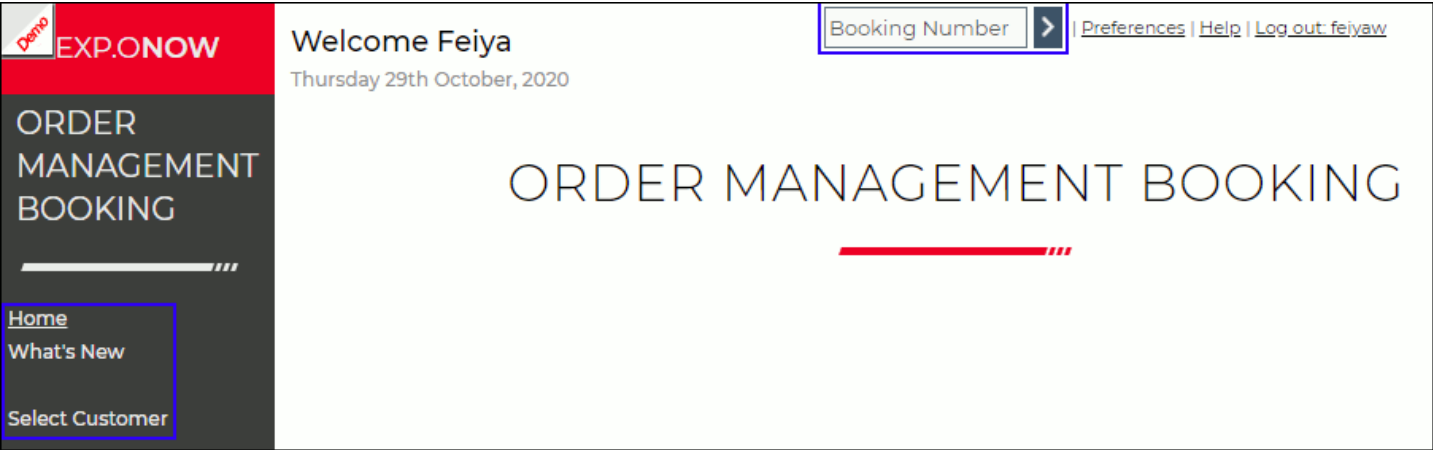
Figure 4: New Password

- 6** You can then sign out and [sign into OMB](https://omb.expeditors.com/omb/Login.jsp) (<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



Demo

EXP.ONOW

ORDER
MANAGEMENT
BOOKING

Home

What's New

Select Customer

Customer:
ABC Auto

Select Shipper

Shipper:
XYZ Distribution Inc.

Configuration

Add Booking

Assign PO Items

Request PO Info

Search

POs

PO Milestones

Bookings

POs & Bookings

Booking Warnings

Review Booking

▼ Search Criteria

Booking Number

Begins ▼

Status

[ALL]

APPROVED

BOOKED

CANCELLED

DRAFT

> Advanced

Print Booking Form


View Selected Only

☐

Booking Number

Shipper Name
(BK)

☐

BD007512 |  Copy

XYZ Company

Shipper Left Navigation Menu - Search Bookings

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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.

User Preferences

Booking Number > | Preferences | Help | Log out: feiyaw

User Name
feiyaw

Access Level
Shipper

*First Name
Shipper

*Last Name
User

*Email
shipper.user@company.com

Telephone
Telephone

Fax
Fax

*Time Zone
ACT-Central Standard Time (Northern Territory) ▾

Sponsoring Org
Sponsoring Org

Port
Port 🔍

Filter Preference
☒ Basic ☐ Custom

Invited By

Invitation Created

Invitation Completed

Last Logged In
05-Nov-2020 06:48:02 GMT

Notes:

Close

SAVE

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.

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 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 ▼

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

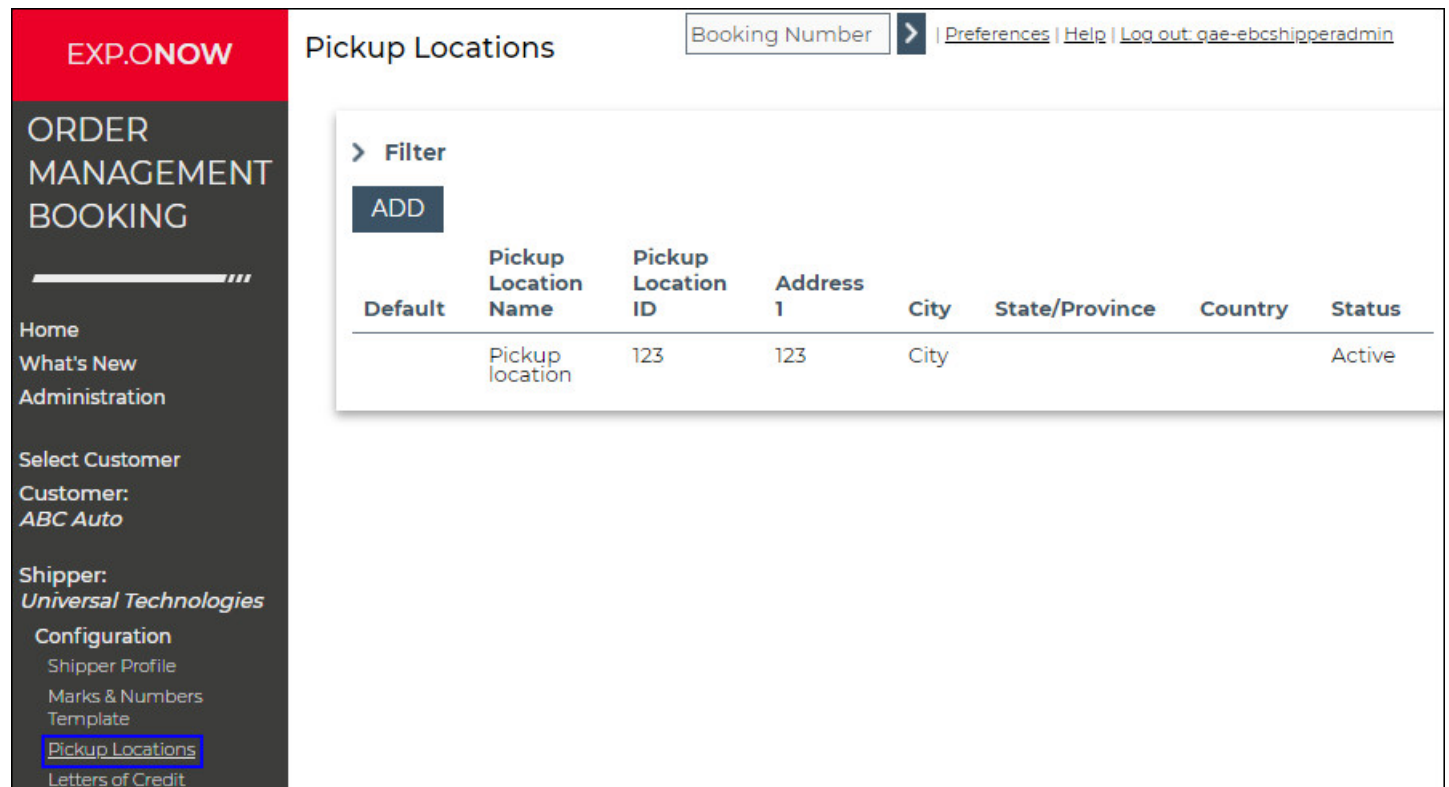
- **Receive Order Alerts:** You can click **Yes** to activate the Receive Order Alerts option, which will enable you to receive an email from the system when an order has been updated in the system, for example, when the customer updates the quantity on a PO.
- **Schedule for Daily summary of PO Acknowledgement activities:**
 - **Attach 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.



The screenshot displays the 'Pickup Locations' page in the EXP.ONOW system. The left sidebar contains navigation links: Home, What's New, Administration, Select Customer (ABC Auto), Shipper (Universal Technologies), Configuration (Shipper Profile, Marks & Numbers, Template, Pickup Locations, Letters of Credit), and a red 'EXP.ONOW' header. The main content area features a 'Pickup Locations' title, a 'Booking Number' input field, and a 'Filter' button. Below the filter is an 'ADD' button and a table with the following data:

Default	Pickup Location Name	Pickup Location ID	Address 1	City	State/Province	Country	Status
	Pickup location	123	123	City			Active

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.

Pickup Locations

Booking Number > | [Preferences](#) | [Help](#) | [Log out: gae-ebcshipperadmin](#)

Pickup Locations > Details

Pickup Location ID *

Pickup Location Name *

Status

Active ▼

Set as Default

☐

Address

Contact

Address

Address

City

State/Prov

Postal Code

Country

Cancel

SAVE

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.

The screenshot shows the 'Letters of Credit' page in the EXP.ONOW system. The left sidebar contains a navigation menu with options like Home, What's New, Administration, Select Customer, Customer: ABC Auto, Shipper: Universal Technologies, Configuration, Shipper Profile, Marks & Numbers, Template, Pickup Locations, Letters of Credit (highlighted), and Shipper Parties. The main content area has a header with 'Letters of Credit', a 'Booking Number' input field, and links for Preferences, Help, and Log out. Below this is a 'Filter' button and an 'ADD' button. A table lists existing letters of credit with columns for Default, LC Num, Description, and Status.

Default	LC Num	Description	Status
	Letter Number 11		InActive
✓	Letter Number 22		Active

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.

Letters of Credit

Booking Number > | [Preferences](#) | [Help](#) | [Log out: yulimfrtests](#)

Letter of Credit > Details

LC Num *

Description

Status
Active ▾

Set as default
☐

Cancel SAVE

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.

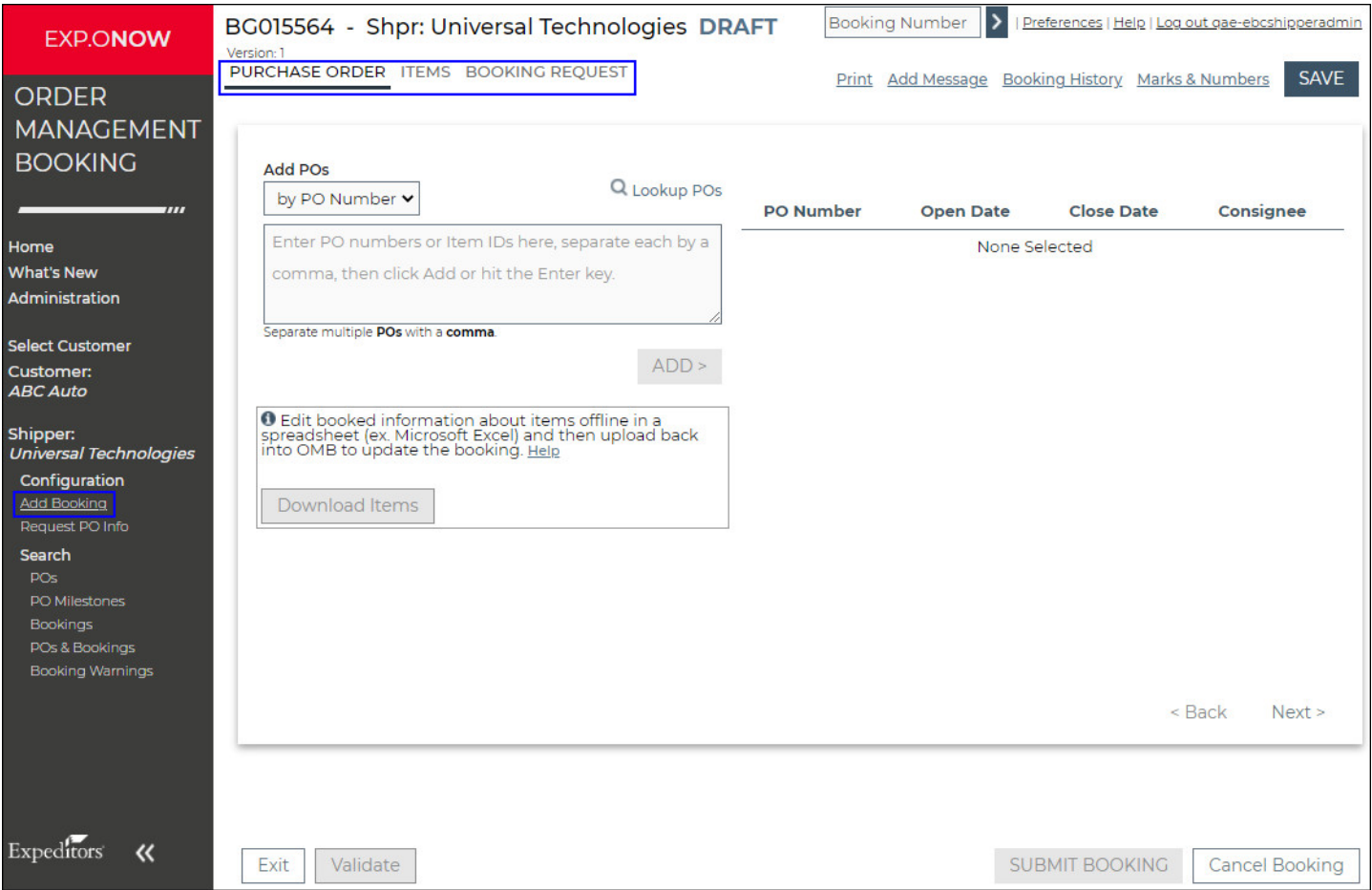


Figure 1: Shipper Add Bookings - Purchase Order Tab

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.

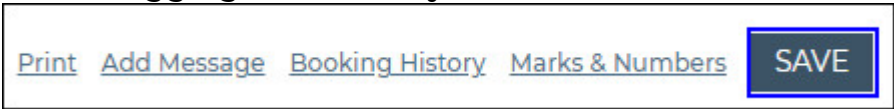


Figure 2: Save Button

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.

Add POs

by PO Number ▼

Lookup POs

PO100410000, PO071811000, PO051911011

Separate multiple POs with a comma.

ADD >

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

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

<input type="checkbox"/>	PO Number	Open Date (PO)	Close Date (PO)	Consignee
<input checked="" type="checkbox"/>	PO051911002	05-Aug-2007	15-Dec-2020	ABC Auto
<input type="checkbox"/>	PO051911003	05-Aug-2007	15-Dec-2020	ABC Auto
<input type="checkbox"/>	PO051911011	05-Aug-2007	15-Dec-2020	ABC Auto
<input checked="" type="checkbox"/>	PO071811000	25-Jul-2011	15-Dec-2020	ABC Auto
<input checked="" type="checkbox"/>	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.



Version: 1

PURCHASE ORDER **ITEMS** BOOKING REQUEST[Print](#)[Add Message](#)[Booking History](#)[Marks & Numbers](#)**SAVE****Items**> [Filter Items](#)

<input type="checkbox"/> PO	Item ID	Booked Description	Pieces Booked	Cases Booked	Case Unit	Available To Book	Net Weight	Bool
<input type="checkbox"/> PO051911002	CL249-Q				CTN			
<input type="checkbox"/> PO051911002	CL369-Q				CTN			
<input checked="" type="checkbox"/> PO051911003	CL249-Q	Super-Gravel 215 45-17	100	10	CTN			
<input checked="" type="checkbox"/> PO051911003	CL369-Q	Super-Snow 215 45-17	200	20	CTN			
<input checked="" type="checkbox"/> PO051911011	CL249-Q	Super-Gravel 215 45-17	100	10	CTN			
<input type="checkbox"/> PO051911011	CL369-Q				CTN			
<input type="checkbox"/> PO071811000	CL249-Q				CTN			
<input type="checkbox"/> PO071811000	CL369-Q				CTN			
<input type="checkbox"/> PO100410000	CL249-Q				CTN			
<input type="checkbox"/> PO100410000	CL369-Q				CTN			

< Back

Next >

Exit

Validate

SUBMIT BOOKING

Cancel Booking

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.](#)

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 *	Agent (Notify Party)	Origin Port Code *
<input type="text" value="Universal Technologies"/>	<input type="text"/>	<input type="text"/>
Consignee *	Also Notify Party	Dest. Port Code *
<input type="text" value="ABC Auto"/>	<input type="text"/>	<input type="text"/>
Shipper Reference	Booking Branch *	Final Destination *
<input type="text"/>	<input type="text"/>	<input type="text"/>

▼ Shipping Details

Shipment Type *	Total Weight
<input type="text" value="Ocean"/>	400.000 (KG)
Service Type *	Total Volume *
<input type="text" value="CFS"/>	6.715 (CBM)
BL Type *	
<input type="text"/>	
<small>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.</small>	
Delivery Method *	
<input type="text" value="Exporter Delivery"/>	
Date Freight Available *	Time *
<input type="text"/>	<input type="text"/>

▼ 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 Details

Goods Description *	Show Routing Request
<input type="text"/>	
Dangerous Goods *	Lithium batteries *
<input type="text"/>	<input type="text"/>
Does this shipment contain solid wood packing materials? *	
<input type="text"/>	
Letter of Credit Number	
<input type="text" value="34524523452345"/>	
Special Instructions/Equipment Request:	
<input type="text"/>	

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.

ENTER VERIFIED GROSS MASS

Container Number *	Container Size *
<input type="text"/>	<input type="text"/>
Seal Number:	Method *
<input type="text"/>	<input type="text"/>

*Method 1: Upon the conclusion of packing and sealing a container, the shipper may weigh or have arranged that a third party weighs the packed container.

*Method 2: The shipper (or, by arrangement of the shipper, a third party), may weigh all packages and cargo items, including the mass or pallets, dunnage and other packing and securing material to be packed in the container, and add the tare mass of the container to the sum of the single masses.

Cargo Weight	Dunnage
<input type="text"/> kg	<input type="text"/> kg
Tare	Total Weight *
<input type="text"/> kg	<input type="text"/> kg

Weigher Name	Weighing Company Information
<input type="text"/>	<input type="text"/>
Weigh Date *	Signer Company Information *
<input type="text"/>	<input type="text"/>

By my signature below I certify that information I provided in this form is accurate and complete.

Authorized Signature *	
<input type="text"/>	
Date of Signature *	Signatory's Email *
<input type="text"/>	<input type="text"/>

Exit Remove Previous Next SUBMIT

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

BG015564 - Shpr: Universal Technologies **PENDING EXPEDITORS ACTION** Booking Number > | Preferences !

Version: 2
PURCHASE ORDER ITEMS BOOKING REQUEST BOOKING CONFIRMATION WARNINGS Print Refresh Add Message Bool

Booking Confirmation Required. Please update the BKD or ETA events in Export. The new dates will automatically update and confirm the booking in OMB.

Shipment

El Shipment No.: 513576951	PO	Onhand No.
El Booking No.: S211098037	PO051911001	

Carrier Code: OOLU
Carrier Booking No.:
Vessel Name: COSCO PORTUGAL
Flight/Voyage No.: 041E
CFS Cutoff Date:
CY Cutoff Date: MNL 12/28/2020 15:00
Freight Received Date: MNL 12/21/2020
Current Est. Departure Date:
Current Est. Arrival Date: LAX 01/20/2021
Confirmed On Board Date:

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


Importer Security Filing

El Booking No.: [S211098037](#)
Filing Status: NOT_READY
US Customs ISF No.:

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.

Shipment

EI Shipment No.: 513576951
 EI Booking No.: S211098037
 Carrier Code: OOLU
 Carrier Booking No.:
 Vessel Name: COSCO PORTUGAL
 Flight/Voyage No.: 041E
 CFS Cutoff Date:
 CY Cutoff Date: MNL 12/28/2020 15:00
 Freight Received Date: MNL 12/21/2020
 Current Est. Departure Date:
 Current Est. Arrival Date: LAX 01/20/2021
 Confirmed On Board Date:


These are estimated shipping details until the freight

Importer Security Filing

EI Booking No.: [S211098037](#)
 Filing Status: NOT_READY
 US Customs ISF No.:

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.

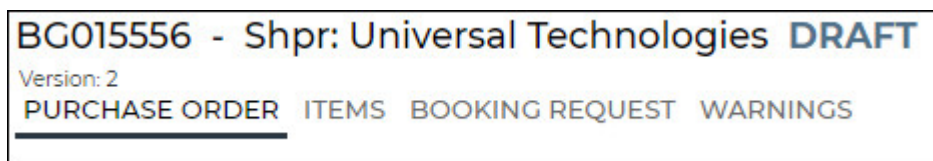
Importer Security Filing

EI Booking No.: [S211098037](#)
 Filing Status: NOT_READY
 US Customs ISF No.:

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.

- **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.



BG015556 - Shpr: Universal Technologies **DRAFT**
 Version: 2
 PURCHASE ORDER ITEMS BOOKING REQUEST WARNINGS

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.



Booking Number > | [Preferences](#) | [Help](#) | [Log out qae-ebcshipperadmin](#)
[Print](#) [Add Message](#) [Booking History](#) [Marks & Numbers](#) **SAVE**

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.

The image is a screenshot of a web application interface. In the foreground, a modal dialog box titled "ADD MESSAGE" is open. It features a large text area for entering a message, with a character count at the bottom indicating "2000/2000 Characters remaining". Below the text area are two buttons: "Cancel" and "POST". The background is slightly dimmed but shows a sidebar on the left with "EST" and "WARNINGS" tabs. The top of the page has a navigation bar with "Booking Number", "Preferences", and "Booking History" links. A red box highlights the "Add Message" link in the top right area of the page.

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**.

REQUEST WARNINGS

[Print](#) [Add Message](#) [Booking History](#)

Booking History - Google Chrome

Booking History - BG015556

Action	When	Note
Transmitted to Expeditors Branch	12/16/2020 18:07 GMT	Transmitted to HKG
REOPENED	12/16/2020 17:37 GMT	qae-ebcsysadmin (Expeditors): Clerical Error
Warning Rejected	12/16/2020 17:35 GMT	qae-ebcsysadmin (Expeditors):Warning Submitted 16 Dec 2020 17:03:28: Item ID CL249-Q on PO CC033110001: The booked quantity of 1 pieces is more than 3% below the pieces ordered and requires approval.
Warning Approved	12/16/2020 17:35 GMT	qae-ebcsysadmin (Expeditors):Warning Submitted 16 Dec 2020 17:03:28: CFS containers require approval.
Warning Approved	12/16/2020 17:35 GMT	qae-ebcsysadmin (Expeditors):Warning Submitted 16 Dec 2020 17:03:28: PO CC033110001 has not passed Quality Assurance and requires approval based on the booking rules.
Warning Approved	12/16/2020 17:35 GMT	qae-ebcsysadmin (Expeditors):Warning Submitted 16 Dec 2020 17:03:28: Item CL249-Q on CC033110001 has not had Order Confirmation and requires approval based on the booking rules.
REJECTED	12/16/2020 17:35 GMT	qae-ebcsysadmin (Expeditors): More needed.
Transmitted to Expeditors Branch	12/16/2020 17:03 GMT	Transmitted to HKG
PENDING EXPEDITORS ACTION	12/16/2020 17:03 GMT	Submitted by qae-ebcshipperadmin (Shipper) Generate Booking Spreadsheet
CREATED	12/16/2020 17:00 GMT	qae-ebcshipperadmin (Shipper)

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	OGA		
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.

PURCHASE ORDER ITEMS BOOKING REQUEST [Print](#) [Add Message](#) [Booking History](#) **Marks & Numbers** [SAVE](#)

Marks & Numbers
Click **Generate** to add Marks & Numbers to your booking. [What is this?](#)

[Generate](#)

Marks & Numbers **Description of Packages and Goods**

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.

Marks & Numbers **Description of Packages and Goods**

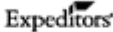
Figure 19: Click and Drag to Expand Boxes

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](#):

Save a Copy Search Select 100% Sign

Pages

EXPEDITORS CARGO MANAGEMENT SERVICES


THE VENDOR CERTIFIES THAT THE PARTICULARS IN THE FACE HEREOF ARE CORRECT AND AGREES TO THE TERM AND CONDITIONS. GOODS WILL BE RECEIVED BY ECMS FOR STORAGE CONSOLIDATION, FORWARDING OR SHIPMENT, PER INSTRUCTIONS OF ITS PRINCIPAL.


MARKS & NUMBERS	DESCRIPTION OF PACKAGES AND GOODS
Booking Branch: EXPEDITORS INTL-LAX 12200 Wilkie Avenue Suite 100 Hawthorne, California United States Consignee: Consignee1 Dangerous Good? NO Goods Description: Blue shoes size 7	This Package is for Consignee1. For Item: 30031-430-022/000003 Description: 8 Gear Shl c10/c11 Close Date: 09/27/2007 Piece Ordered: 200 For Item: 30031-430-023/000004 Description: 8 Gear Shl c12/c13 Close Date: 09/27/2007 Piece Ordered: 180 Special Instructions:

Page 2 of 2

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.

Print Booking Form

View Selected Only

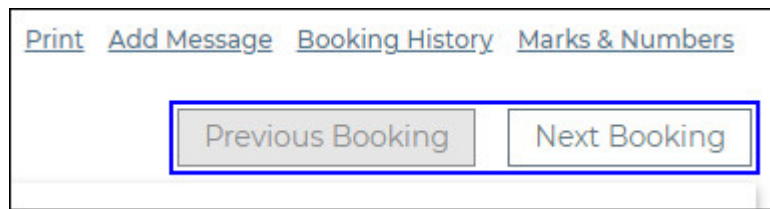
Extract to...

View as Standard

<input type="checkbox"/>	Booking Number	Shipper Name (BK)	Shipper Name (PO)	Manufacturer (BK)	Status <div></div>	Submitted Date
<input type="checkbox"/>	BG015564	dddd	Universal Technologies		APPROVED	17-Dec-2020 17:49
<input checked="" type="checkbox"/>	BG015555	Universal Technologies	Universal Technologies	RALLY TIRES, INC	DRAFT	
<input checked="" type="checkbox"/>	BG015557	Universal Technologies	Universal Technologies	Tires & Traction	DRAFT	

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.






<input type="checkbox"/>	Booking Number		Status	Created By Type
<input type="checkbox"/>	BG015556	 Copy	PENDING EXPEDITORS ACTION	Shipper
<input type="checkbox"/>	BG015562	 Copy	DRAFT	Shipper
<input type="checkbox"/>	BG015564	 Copy	APPROVED	Shipper
<input type="checkbox"/>	BG015565	 Copy	DRAFT	Shipper
<input type="checkbox"/>	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**.

REASON FOR REOPEN

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.

Reason for Reopen *

Choose Reopen Reason...

The changes you make to the booking can incur liability and penalties. Do you want to continue and accept these risks?

Cancel

I ACCEPT

< Back

Next >

Reopen as Draft

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:

ERROR

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).

Close

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.

EXP.ONOW

ORDER
MANAGEMENT
BOOKING

Home
What's New
Administration
Select Customer
Customer:
ABC Auto
Shipper:
Universal Technologies
Configuration
Add Booking
Request PO Info
Search
POs
PO Milestones
Bookings
POs & Bookings
Booking Warnings

View Purchase Orders

Booking Number > | Preferences | Help | Log out: oae-ebcshipoperadmin

▼ Search Criteria

BASIC SEARCH

CUSTOM SEARCH

PO Number

Begins ▼

Shipment Type (PO)

[ALL]
AIR
OCEAN
TRUCK

Origin Port

Begins ▼

Destination Port

Begins ▼

Date Created

▼

Open Date (PO)

▼

Close Date (PO)

▼

> Advanced

Clear

SEARCH

Extract to... ▼

PO Number	Consignee	Date Created	Shipment Type (PO)	Origin Port	Destination Port	Open Date (PO)	Close Date (PO)
00576902	ABC Auto			CU1	CTG	24-Nov-2010	15-Dec-2020
CC033110001	ABC Auto	17-Feb-2010		SZX		01-Jan-2010	15-Dec-2020

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: 456789

[View POs](#) > **PO Details**

Open Date (PO): 06/10/2021
Close Date (PO): 06/20/2021

Shipper Name: Universal Technologies

> Details **A**

Item ID

FILTER **B**

C **D**

Print PO

View History

Discussion **E**

[Discuss PO](#)

Acknowledgement: Pending Shipper Action

I **acknowledge** that I have reviewed this purchase order and will create a booking in the future to fulfill it.

Accept **F**

Milestones: Pending Shipper Action

Materials Ordered milestone is missing.

Materials Received milestone is missing.

Production Started milestone is missing.

Production Finished milestone is missing.

Quality Control Started milestone is missing.

Quality Control Finished milestone is missing.

Booking Required to be submitted before 05-Jun-2021.

Add Estimates **G**

Line Items **H**

Item ID	Shippers Item ID	Description	Pieces Ordered	Service Level	Manufacturer	item ref test 3	item ref test 5
1234		Widget 2	100				
1235		Widget 3	100				
1236		Widget 4	100				
1237		Widget 5	100				

Figure 1: PO Details Page

- **A. Details**

Click to view all of the details of the PO.

Purchase Order: 456789

Booking Number
>
|
Prefe

View PO Milestones
>
PO Details

Open Date (PO): 06/10/2021
Close Date (PO): 06/20/2021

Shipper Name: Universal Technologies

Details

Version: 1
Date Created: 12/18/2020
Origin Country:
Origin Port: SZX
Dest Port: LAX
Port Of Loading: HKG
Final Destination:
Consolidator:
Ship To:

Total Outer:
Outer Unit:
Total Inner:
Inner Unit:
Total Cube:

Req Delivery Open:
Req Delivery Close:

Consignee Name: Consignee Company
Division (PO): division A
Department: department X
Buyer: John Doe
Buyer Agent:
Project:
Warehouse: seventh
Stuffing Location:
Bill To:

Service Level:
Service Type:
Shipment Type: Ocean
Terms:
Special Instructions:
Available To Book:
Quality Assurance:

Item ID

FILTER

Print PO

View History

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.

main 1 / 1

Purchase Order

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:			

Download

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.

Purchase Order: 456789

Item ID [FILTER](#) [View Discussion](#)

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.











Milestones: Pending Shipper Action
Materials Ordered on 07-Jan-2021.
Materials are estimated to be **Received** on 20-Jan-2021.
Complete on  
Production is estimated to be **Started** on 21-Jan-2021.
Complete on  
Production is estimated to be **Finished** on 29-Jan-2021.
Complete on  
Quality Control is estimated to be **Started** on 31-Jan-2021.
Complete on  
Quality Control is estimated to be **Finished** on 02-Feb-2021.
Complete on  
Booking Required to be submitted before 05-Jun-2021.

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.

EXP.ONOW

ORDER MANAGEMENT BOOKING

Home

What's New

Administration

Select Customer

Customer: ABC Auto

Shipper: Universal Technologies

Configuration

Add Booking

Request PO Info

Search

POs

PO Milestones

Bookings

POs & Bookings

Booking Warnings

View Warnings

Booking Number

Preferences | Help | Log out user-abcshippereadmin

Search Criteria

System Default

Edit List

Schedule

Save Search

Booking Number (BK)

Begins

Status (BK)

[ALL]

APPROVED

BOOKED

CANCELLED

DRAFT

Warning Condition (W)

[ALL]

Warning Status (W)

[ALL]

APPROVED

REJECTED

NO ACTION TAKEN

Warning Date Submitted (W)

Past 90 days

Clear

SEARCH

Configure

Extract to..

	Booking Number (BK)	Warning Reference (W)	Origin Port Code (BK)	Final Destination (BK)	Warning Date Submitted (W)	Warning Status (W)	Warning Type (W)	Warning Description (W)	Status (BK)	Shipper Name (BK)	Freight Available Date (BK)
<input type="checkbox"/>	BG015556 Copy	Item ID CL249-Q on PO CC033110001	OGA	RIO	16-Dec-2020 17:03	Rejected	Item Quantity Under-booked	Item ID CL249-Q on PO CC033110001: The booked quantity of 1 pieces is more than 3% below the pieces ordered and requires approval.	PENDING EXPEDITORS ACTION	dddd	21-Dec-2020 08:00

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.

EXP.ONOW

ORDER
MANAGEMENT
BOOKING

Home

What's New

Administration

Select Customer

Customer:
ABC Auto

Shipper:
Universal Technologies

Configuration

Add Booking

Request PO Info

Search

POs

PO Milestones

Bookings

POs & Bookings

Booking Warnings

Review Booking

Booking Number > | [Preferences](#) | [Help](#) | [Log out: gae-ebcshipperadmin](#)

▼ Search Criteria

BASIC SEARCH

CUSTOM SEARCH

BK Created By ▼

Edit List

Schedule

Save Search

Booking Number

Contains ▼

Create Time

Status

[ALL]

APPROVED

BOOKED

CANCELLED

DRAFT

Created By

Begins ▼

Created By Type

[ALL]

Customer

Expeditors

Exporter Controlled

Manufacturer

Clear

SEARCH

▼ Configure

Criteria Field Setup

	Criteria Field	Show?
▲▼	Booking Number	<input checked="" type="checkbox"/>
▲▼	Create Time	<input checked="" type="checkbox"/>
▲▼	Status	<input checked="" type="checkbox"/>
▲▼	Created By	<input checked="" type="checkbox"/>
▲▼	Created By Type	<input checked="" type="checkbox"/>

*At least one item must be checked

Results Table Setup

	Result Column	Show?
▲▼	Booking Number	<input checked="" type="checkbox"/>
▲▼	Status	<input checked="" type="checkbox"/>
▲▼	Shipper Name (BK)	<input checked="" type="checkbox"/>
▲▼	Create Time	<input checked="" type="checkbox"/>
▲▼	Created By	<input checked="" type="checkbox"/>

*At least one item must be checked

Sort Order

sort first by:

Status ▼

Ascending (A-Z) ▼

then by:

[None selected] ▼

Ascending (A-Z) ▼

then by:

[None selected] ▼

Ascending (A-Z) ▼

Reset

APPLY

Figure 1: Custom Search and Configure Section

To use the Custom Search feature:

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- 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.

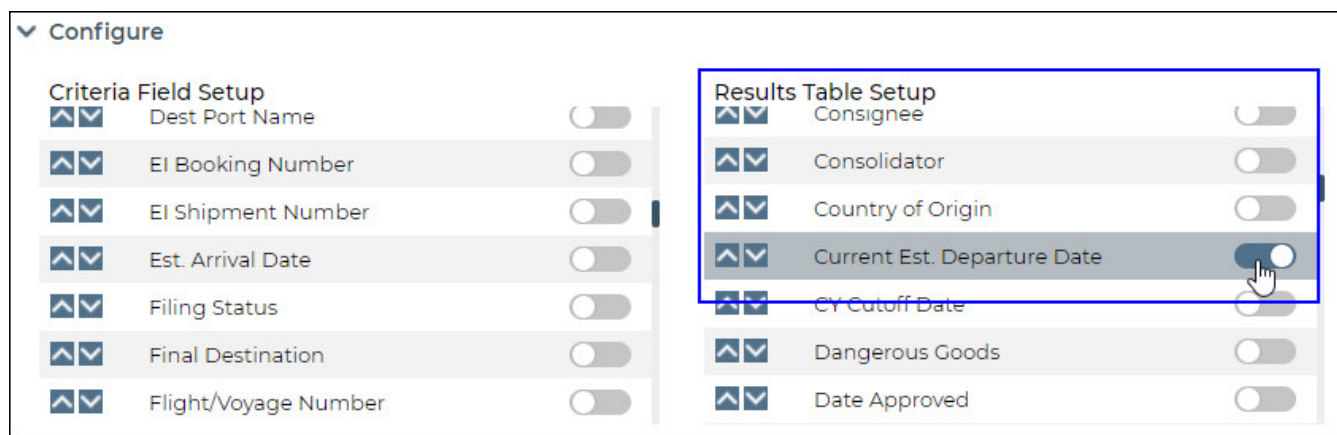


Figure 2: Results Table Setup

- 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.

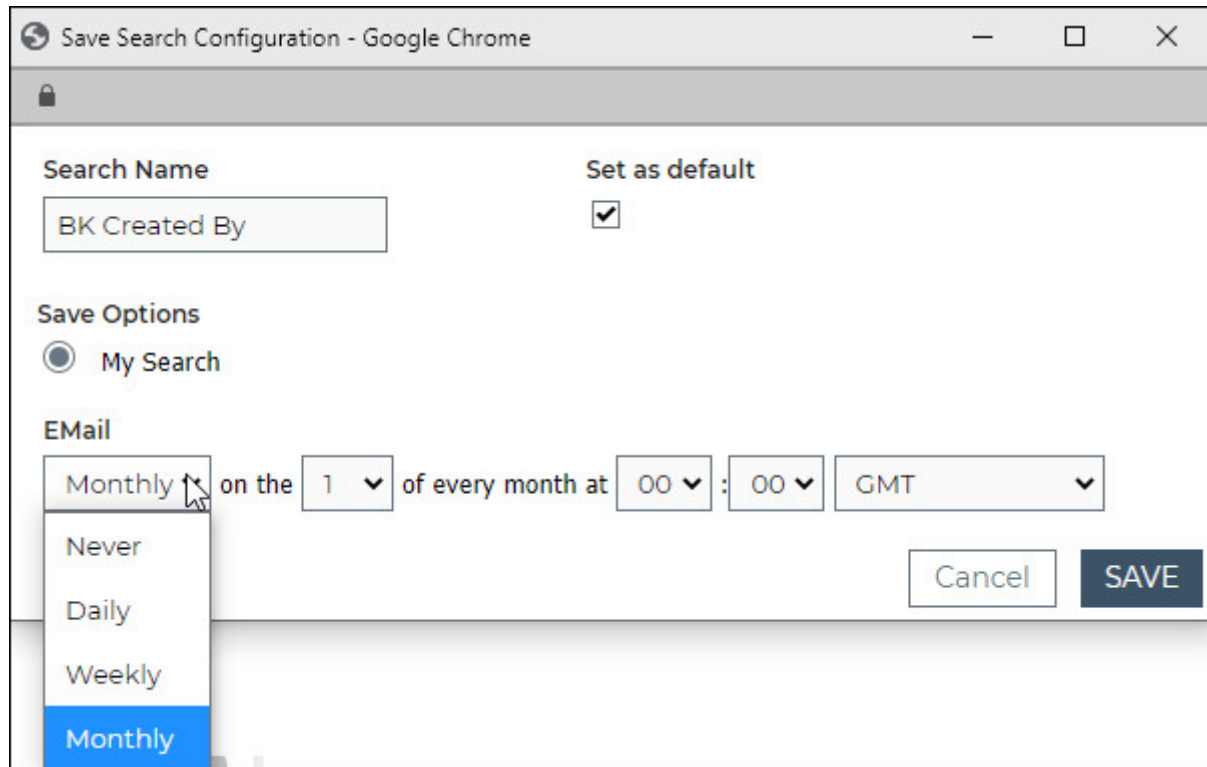
A screenshot of a web browser window titled "Save Search Configuration - Google Chrome". The window contains a form for configuring a search. At the top, there is a "Search Name" field with the text "BK Created By" and a "Set as default" checkbox which is checked. Below this is a "Save Options" section with a radio button labeled "My Search" which is selected. The "Email" section features a dropdown menu currently showing "Monthly", with a list of options (Never, Daily, Weekly, Monthly) visible below it. To the right of the dropdown is the text "on the" followed by a number "1" in a dropdown, then "of every month at" followed by two time dropdowns both set to "00", and a time zone dropdown set to "GMT". At the bottom right of the form are "Cancel" and "SAVE" buttons.

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**.

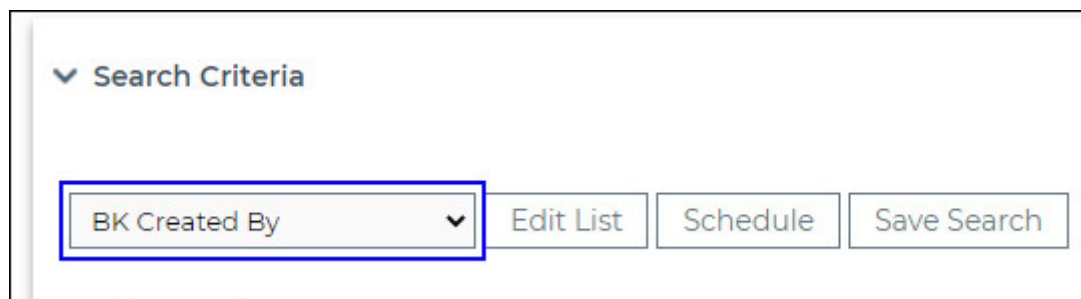
A screenshot of a web interface showing a "Search Criteria" section. Below the section header is a dropdown menu with the text "BK Created By" and a downward arrow. To the right of the dropdown are three buttons: "Edit List", "Schedule", and "Save Search". The dropdown menu is highlighted with a blue border.

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.

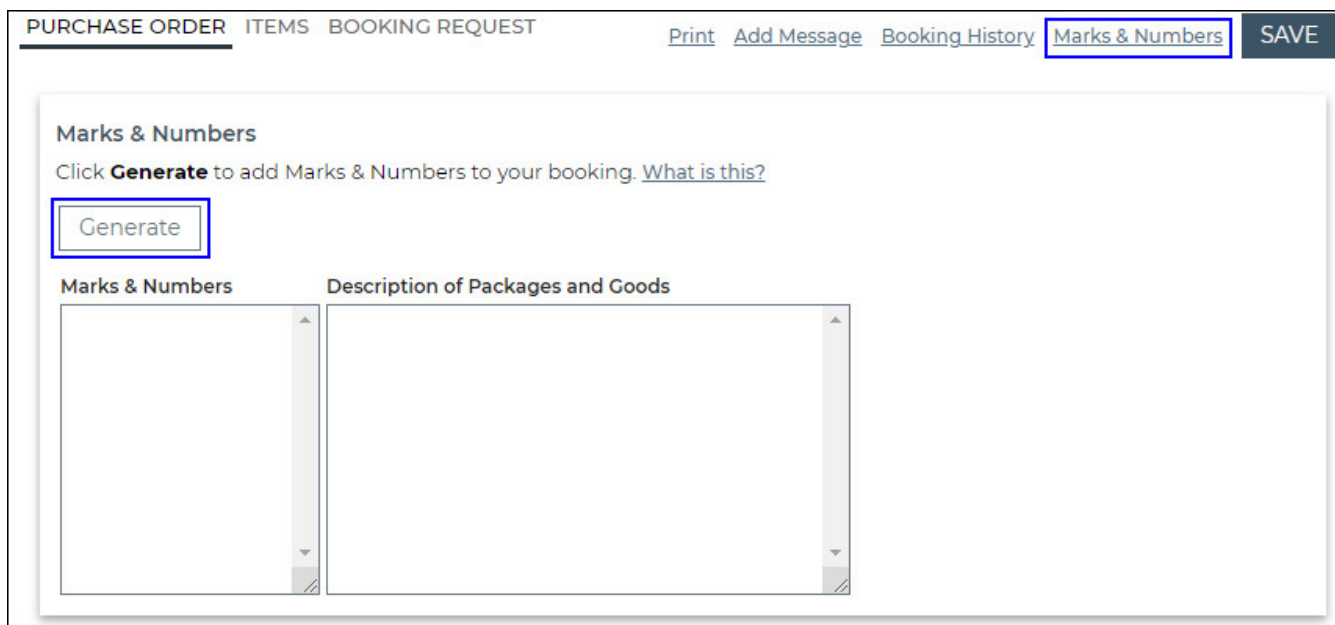
The screenshot shows a web interface for a booking system. At the top, there is a navigation bar with tabs: 'PURCHASE ORDER', 'ITEMS', 'BOOKING REQUEST', and 'Marks & Numbers' (which is highlighted with a blue border). To the right of the tabs are links for 'Print', 'Add Message', 'Booking History', and a 'SAVE' button. Below the navigation bar, the 'Marks & Numbers' section is displayed. It contains a heading 'Marks & Numbers', a sub-heading 'Click **Generate** to add Marks & Numbers to your booking. [What is this?](#)', and a 'Generate' button (highlighted with a blue border). Below the button, there are two side-by-side text areas: 'Marks & Numbers' on the left and 'Description of Packages and Goods' on the right. Both areas are currently empty.

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.

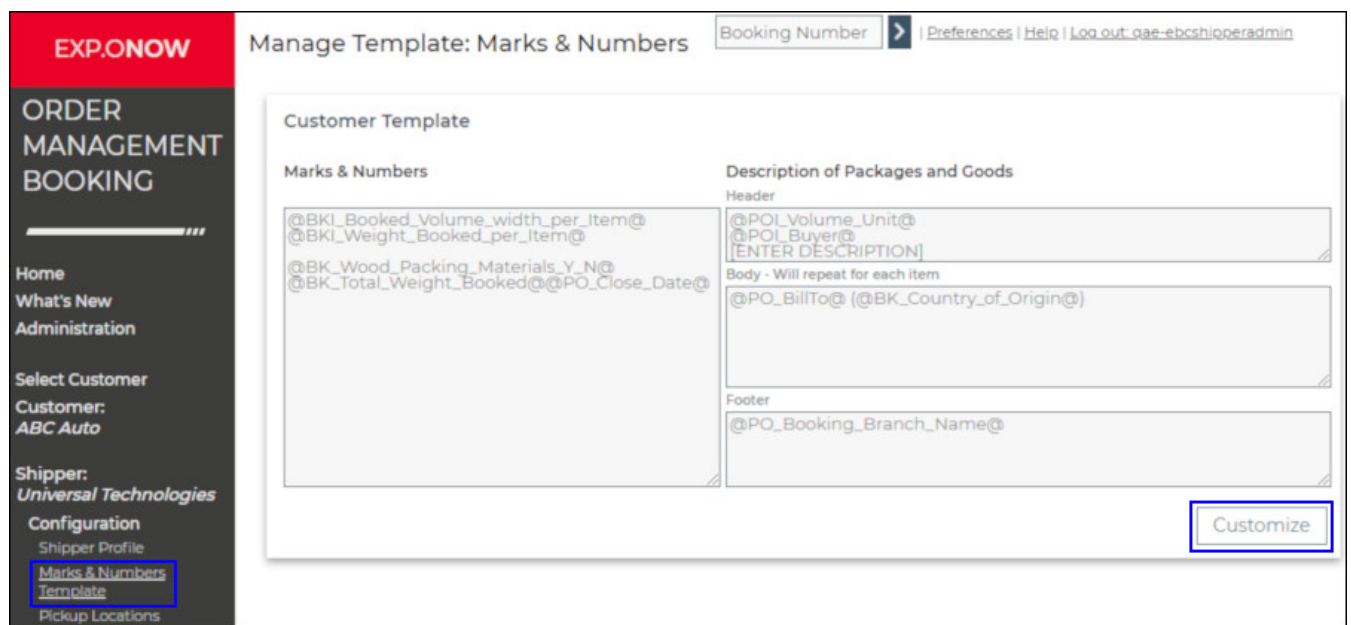


Figure 4: Shipper - Marks & Numbers Template Link

- 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.

Customer Template

Marks & Numbers

@BKI_Booked_Volume_width_per_Item@

@BKI_Weight_Booked_per_Item@

@BK_Wood_Packing_Materials_Y_N@

@BK_Total_Weight_Booked@@PO_Close_Date@

Description of Packages and Goods

Header

@PO_Volume_Unit@

@PO_Buyer@

[ENTER DESCRIPTION]

Body - Will repeat for each item

@PO_BillTo@ (@BK_Country_of_Origin@)

Footer

@PO_Booking_Branch_Name@

↓ Copy Down ↓

Shipper Template

List of Variables - Generating Marks & Numbers will replace these variables with actual data from the Booking or PO. **Drag and drop** them into your template.

Booking Variables

Additional Charges

Agent (Notify Party) Name

Agent (Notify Party) Name & .

Also Notify Party Name

Also Notify Party Name & Adc

BL Type

Booked Country of Origin

PO Variables

Date Created

Delivery Method

Department

Department (PO Item)

Dest Port Code

Dest Port Code (PO Item)

Dest Port Name (PO Item)

Division

Static Terms

[ENTER DESCRIPTION]

[ENTER NUMBER]

[ENTER QUANTITY]

[SEE ATTACHED DOCUMENT]

Marks & Numbers

Description of Packages and Goods

Header

Body - Will repeat for each item

Footer

"Publish" to make the template available for use in bookings.

Exit

Use Customer's Template

PUBLISH

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:

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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"/> PO	Item ID	Booked Description	Pieces Booked	Cases Booked	Case Unit
<input checked="" type="checkbox"/>	NR03151001 CL249-Q	Super-Gravel 215 45-17	100	10	CTN
<input checked="" type="checkbox"/>	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:

Marks & Numbers

Item ID: CL249-Q,
CL369-Q

Pieces Ordered:
100, 200

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: @BKL_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:

<input type="checkbox"/>	PO	Item ID	Booked Description	Pieces Booked	Cases Booked	Case Unit
<input checked="" type="checkbox"/>	NR03151001	CL249-Q	Super-Gravel 215 45-17	100	10	CTN
<input checked="" type="checkbox"/>	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

- 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.

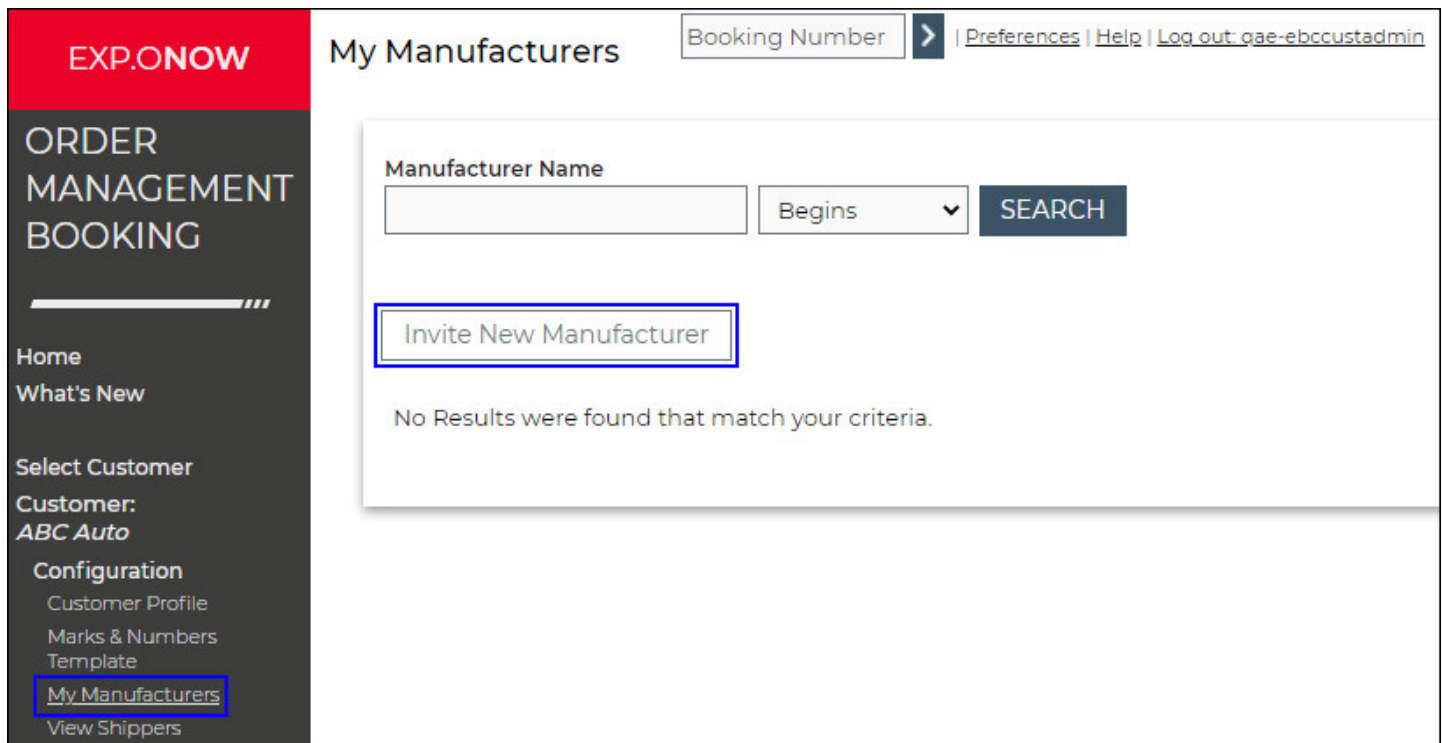


Figure 1: My Manufacturers

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.

My Manufacturer > Invite New Manufacturer

Booking Number > | [Preferences](#) | [Help](#) | [Log out: gae-ebccustadmin](#)

New Manufacturer
Invite to use Order Management Booking

Manufacturer name *

▼ Contact Details

First Name *

Last Name *

Email *

! An email invitation will be sent to the manufacturer. When the manufacturer signs into Order Management Booking, you will receive an email update.

[Cancel](#) [SEND](#)

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](#).

EXP.ONOW Assign Purchase Orders

Booking Number | Preferences | Help | Log out: cust-fei@aw

ORDER MANAGEMENT BOOKING

Home
What's New
Customer: Test Customer
Configuration
Assign PO Items
Search
POs
PO Milestones
Bookings
POs & Bookings
Booking Warnings

PO Number: [] Begins [v]
Item ID: [] Begins [v]
Shipper Name: [] Begins [v]
Manufacturer: [] Begins [v]
Open Date (PO): []
Close Date (PO): []
Description: [] Begins [v]

Clear SEARCH

Assign Manufacturer Remove Manufacturer ☐ Apply to full PO

	PO Number	Item ID	Shipper	Manufacturer	Pieces Remaining	Open Date: Close Date	Description
<input type="checkbox"/>	0000000003011658	3011658	TESTCUS WONDERFUL SHIPPER		1		
<input type="checkbox"/>	0000000003011658	3011659	TESTCUS WONDERFUL SHIPPER		1		

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.

Manufacturer Name	Address	City	Contact
Jones Shop			Jones Jonesey

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.

EXP.ONOW

ORDER
MANAGEMENT
BOOKING

Home

What's New

Select Customer

Customer:
ABC Auto

Select Shipper

Shipper:
XYZ Distribution Inc.

Configuration

Add Booking

Assign PO Items

Request PO Info

Request PO

Booking Number

Preferences | Help | Log out: feiyaw

PO Number *

Origin *

Shipper *

XYZ Distribution Inc.

Notes

PREVIEW

Figure 1: Shipper - Request PO Page

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