Oracle® Retail Trade Management
Transportation User Guide

ORACLE®

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Oracle® Retail Trade Management Transportation User Guide, Release 24.0.101.0

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Preface

This document describes the Oracle Retail Trade Management user interface. It provides step-by-step instructions to complete most tasks that can be performed through the user interface.

Audience

This document is for users and administrators of Oracle Retail Trade Management. This includes merchandisers, buyers, business analysts, and administrative personnel.

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Oracle Retail product documentation is available on the following web site:

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An updated version of the applicable Oracle Retail document is indicated by Oracle part number, as well as print date (month and year). An updated version uses the same part number, with a higher-numbered suffix. For example, part number E123456-02 is an updated version of a document with part number E123456-01.

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Oracle Retail product documentation is available on the following web site:

https://docs.oracle.com/en/industries/retail/index.html

(Data Model documents can be obtained through My Oracle Support.)

Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
italic	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
monospace	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

1

Transportation Overview

The movement of goods from origin country to final destination can be tracked through the transportation module.

You can track the following information in the transportation module:

- Shipments
- Countries and ports
- Departure, arrival, and delivery dates
- Commercial invoices
- Freight sizes, SCAC codes, and freight types
- Measurements, weights, and quantities
- Deliveries to final destinations
- Packing methods
- Licenses and visas
- Claims against trading partners
- Missing documents
- Timelines
- Members of an item family

A transportation upload batch program converts data received from trading partners into a standard Oracle Retail file format. As additional information is acquired, it can be entered manually. When a transportation record is complete, you can finalize the record. Finalized transportation records are used to automatically create customs entries. The goods can then be tracked as they move through customs.

The Transportation window contains the following sections.

- Transportation
- Item and Quantities
- Shipment and Receipt
- Freight
- Totals
- Comments

Figure 1-1   Transportation Window

Transportation

The Transportation section contains the transportation ID. In the top right corner of the section the **Candidate** checkbox and the Status list for the transportation is displayed.

> **Note:**
>
> The **Candidate** checkbox can only be elected for items that have an approved HTS code.

The Status field displays the status of the transport. Possible values for the Status field are booked, delivered, loaded, sailed or finalized.

The Transportation section contains the following fields.

Table 1-1   Transportation - Fields and Description

Fields	Description
Shipment Method	Select a shipment method from the list.
Vessel	Enter the vessel ID.
Voyage/Flight	Enter the voyage or flight number.
Estimated Departure Date	Enter or use the Calendar icon to select the estimated departure date.
Actual Departure Date	Enter or use the Calendar icon to select the actual departure date.

Table 1-1   (Cont.) Transportation - Fields and Description

Fields	Description
BOL/AWB	Enter the Bill of Lading (BOL) or the Airway Bill (AWB).
Container	Enter the container ID.
Vessel SCAC Code	Enter, select or search for the standard carrier alpha code.
Rush checkbox	Check the Rush checkbox, to indicate that it is a rush shipment.
Partner Type/Partner	Select a partner type from the list. For example, select Agent. Then the Partner field next to the Partner Type field enables. Enter, select or search for the appropriate partner.

2
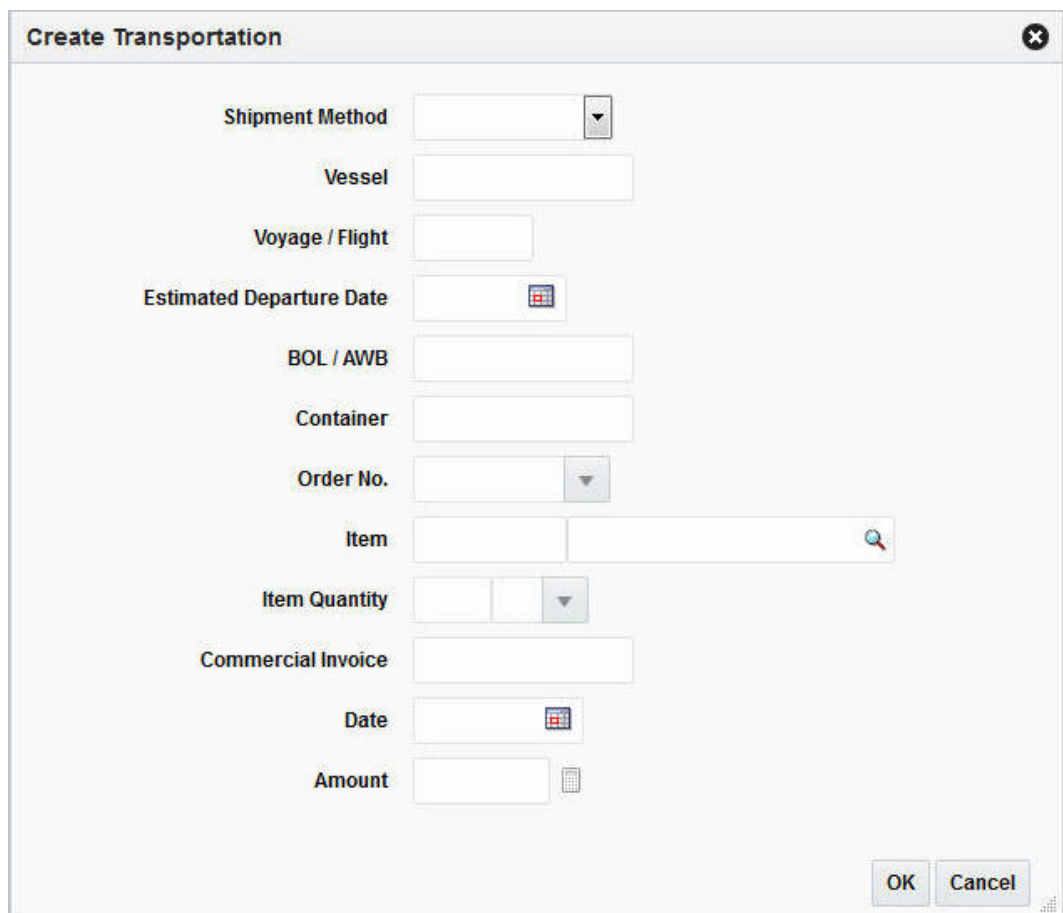
Create a Transportation

Create a Transportation

To create a transportation follow the steps below.

1. From the Tasks menu, select **Trade Management > Create Transportation**. The Create Transportation window appears.

Figure 2-1   Create Transportation Window

2. In the **Shipment Method** field, enter, select or search for the appropriate shipment method.

3. In the **Vessel** field, enter the vessel ID.

4. In the **Voyage/Flight** field, enter, the voyage/flight ID.

5. In the **Estimated Departure Date**, enter the estimated departure date or use the Calendar icon to select the date.

6. In the **BOL/AWB** field, enter the bill of lading number or the airway bill number.

7. In the **Container** field, enter the container ID.

8. In the **Order No.** field, enter, select or search for the appropriate order number.

9. In the **Item** field, enter the item number or use the Search icon to search for the appropriate icon.

10. In the **Item Quantity** field, enter the quantity of the item and enter, select or search for the appropriate unit of measure.

11. In the **Commercial Invoice** field, enter the commercial invoice number.

12. In the **Date** field, enter the date or use the Calendar icon to select the date.

13. In the **Amount f**ield, enter the amount of the transportation.

14. After you have entered all necessary transportation information, choose one of the following options.

    • Select **OK** to save the transportation and close the Create Transportation window. The Transportation window appears.

      For more information about the Transportation window, see the Define a Transportation section.

    • Select **Cancel** to reject all entries and exit the Create Transportation window.

Define a Transportation

Item and Quantities

The Item and Quantities section contains the following fields.

Table 2-1   Item and Quantities - Fields and Description

Fields	Description
Order No.	Enter, select or search for the appropriate order number.
	The Details icon opens the Order Details window.
	For more information about the Order Details window, see the "Order Details" section in the *Oracle Retail Merchandising Purchase Orders and Contracts User Guide*.
Item	Enter the item number or use the Search icon to search for the appropriate item.
Lot	Enter the lot number.
Carton Quantity	Enter the carton quantity. Then select or search for the carton unit of measure (UOM).
Item Quantity	Enter the item quantity. Then select or search for the item unit of measure (UOM).
Gross Weight	Enter the gross weight. Then select or search for the gross weight unit of measure (UOM).
Net Weight	Enter the net weight. Then select or search for the net weight unit of measure (UOM).
Cubic	Enter the cubic quantity. Then select or search for the cubic unit of measure (UOM).

Commercial Invoice

The Commercial Invoice section contains the following fields.

Table 2-2   Commercial Invoice - Fields and Description

Fields	Description
Commercial Invoice	Enter the commercial invoice ID.
Date	Enter or use the Calendar icon to select the date of the commercial invoice.
Supplier Site	The supplier site is displayed automatically.
Amount	Enter the amount of the commercial invoice. Use the Recalculate icon to recalculate the invoice amount.
Currency	Enter, select or search for the appropriate currency.
Exchange Rate	This field is auto-populated and represents the exchange rate to convert from the currency on the transportation record to the currency of the import locations for which the shipment is intended. Use the Edit Exchange Rate icon to change the rate, if necessary. If you click the icon, the Edit Exchange Rate window appears. For more information about how to edit the Exchange Rate, see the "Editing the Exchange Rate" section in the *Oracle Retail Trade Management Letters of Credit User Guide.*

Shipment and Receipt

The Shipment and Receipt section contains the following fields.

Table 2-3   Shipment and Receipt - Fields and Description

Fields	Description
Country of Sourcing	The country of sourcing is displayed automatically.
Consolidation Country	Enter, select or search for the consolidation country.
Export Country	Enter, select or search for the export country.
Shipment	Enter the shipment ID.
Lading Port	Enter, select or search for the lading port.
Discharge Port	Enter, select or search for the discharge port.
Receipt	Enter the receipt number.
Forwarder's Cargo Receipt	Enter the forwarder's cargo receipt.
Forwarder's Cargo Receipt Date	Enter or use the Calendar icon to select the Forwarder's Cargo Receipt Date.
Estimated Arrival Date	Enter or use the Calendar icon to select the estimated arrival date.
Actual Arrival Date	Enter or use the Calendar icon to select the actual arrival date.
Delivery Date	Enter or use the Calender icon to select the delivery date.

Freight

The Freight section contains the following fields.

Table 2-4   Freight - Fields and Description

Fields	Description
Type	Enter, select or search for the freight type of the shipment.
Size	Enter, select or search for the freight size of the shipment.
In Transit No.	Enter the in transit number.
In Transit Date	Enter the in transit date or use the Calendar icon to select a date.
Service Contract	Enter the service contract.
Seal	Enter the seal.
Container SCAC Code	Enter, select or search for the container standard carrier alpha code (SCAC).
Packing Method	Select the packing method from the list.
Level	Select the level from the list.

Totals

The Totals section contains the following fields.

Table 2-5   Totals - Fields and Description

Fields	Description
Total Units	Enter, select or search for the total units of measure.
Total Cartons	Enter, select or search for the total cartons units of measure.
Total Gross Weight	Enter, select or search for the total gross weight units of measure.
Total Net Weight	Enter, select or search for the total net weight units of measure.
Total Cube	Enter, select or search for the total cube units of measure.
Total Value	The total value is displayed automatically.

Comments

The Comments section contains the comment field. You can enter any comments for the created transport, if necessary.

Transportation - More Actions Menu

Use the More Actions menu to navigate to the following windows. The More Actions menu contains the following options.

Table 2-6   More Actions Menu - Action Buttons and Description

More Actions Buttons	Description
Details	Opens the Transportation Details window. This window displays details of the delivery, packing, and license/visa information as well as claims.
	For more information about Details, see the Details section.
Missing Documents	Opens the Missing Documents window. You can add and delete all the missing documents for the current transport in this window.
	For more information about Missing Documents, see the "Missing Documents" section in the *Oracle Retail Trade Management Customs Entry User Guide*.
Shipments	Opens the Transportation Shipments window. This window displays shipment information such as ASNs, shipped and received date, to location and location name.
	For more information about Shipments, see the Shipments section.
Timelines	Opens the Timelines menu. The menu contains the following options.
	• Transportation
	Opens the Transportation Timelines window.
	• Order/Item
	Opens the Order/Item Timelines window.
	• Container
	Opens the Container Timelines window.
	• BOL/AWB (Bill of Lading/Airway Bill)
	Opens the BOL/AWB Timelines window.
	• Commercial Invoice
	Opens the Commercial Invoice Timelines window.
	For more information about timelines, see the Timelines section.
Items	Opens the Transportation Items window.
	For more information about Items, see the Items section.

Details

In the Transportation Details window you can edit and view delivery, packing, license/visa and claims information related to a transportation record.

Delivery information is edited and viewed at the final destination level. You can indicate how many units and cartons of an item were delivered to which locations.

You can edit and view packing information at the container level. To display the shipped and received quantities for the packing records, select the appropriate option from the View menu.

The Claims table contains claims against a partner. Claims can be created for damaged merchandise and inadequate quantities. A single claim can span multiple cartons.

The Transportation Details window contains the following sections.

• Transportation Details Header

• Delivery

• Packing

- License/Visa
- Claims

Figure 2-2   Transportation Details Window
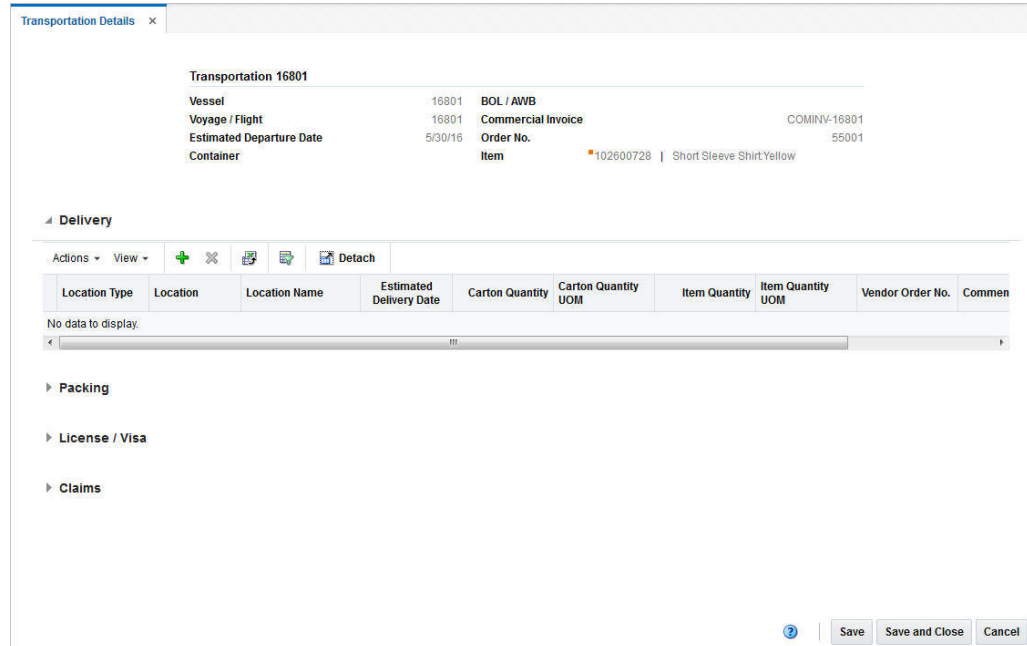
Transportation Details Header

The Transportation Details header displays transportation information such as transportation ID, vessel, voyage/flight number, estimated departure date, container, bill of lading/airway bill, commercial invoice, order number and item information.

Delivery

The Delivery section lists delivery information such as location, location type and description, estimated delivery date, carton and item quantities as well as the vendor order number.

Packing

The Packing section lists packing information such as ID of the first (From Carton) and the last carton (To Carton), the position of a load in the series of containers (Load Position), location of a sample carton, and sample position as well as comments.

Packing Table - Actions Menu, Icons and Buttons

Use the Actions Menu, icons and buttons to apply actions to the table. You can perform the actions listed below, as well as action described in "Action Menu and Icons" in the *Oracle Retail Trade Management Do the Basics User Guide*.

Table 2-7   Packing Table - Actions Menu/Icons/Buttons and Description

Actions Menu/Icons/Button	Description
Default Received Quantities and **Default Received Quantities** button	You can default the received quantities to the value of the shipped quantities by selecting **Actions > Default Received Quantities** or by using the **Default Received Quantities** button.

License/Visa

The Licence/Visa section lists license/visa information such as license/visa type, import country, licence/visa quantity and quantity unit of measure, quota category, net weight, and weight UOM as well as possible comments.

Claims

The Claims section contains claims information such as claim ID, ID of the first (From Carton) and the last carton (To Carton), claim date, item quantity and unit of measure, claim against type and ID, as well as the claim amount and comments.

Add a Delivery

To add a delivery information to a transportation follow the steps listed below.

1. From the Tasks menu, select **Trade Management > Transportation > Manage Transportation.** The Transportation Search window appears.

2. Enter or select search criteria as desired to make the search more restrictive.

3. Click **Search**. The transportations that match the search criteria are displayed in the Results section.

4. Select a record in the Results section.

5. In the Transportation column, click on the transportation link, or mark a record and select **Actions > Edit** or use the Edit icon. The Transportation window appears.

6. In the **More Actions** menu select **Details**. The Transportation Details window appears.

7. In the Delivery table, select **Actions > Add** or use the Add icon. The Add Delivery window appears.

Figure 2-3   Add Delivery Window

a.   In the **Location** type field, select a location type from the list.The field next to the **Location** type field enables, enter, select or search for the location. The Location field is a required field.

b.   In the **Estimated Delivery Date** field, enter the estimated delivery date or use the Calendar icon to select the date.

c.   In the **Carton Quantity** field, enter the appropriate carton quantity. Then enter, select or search for the carton quantity UOM.

d.   In the **Item Quantity** field, enter the appropriate carton quantity. Then enter, select or search for the item quantity UOM.

e.   In the **Vendor Order No.** field, enter the vendor order number.

f.   In the **Comments** field, enter comments for the delivery, if necessary.

g.   Then choose one of the following options.

   •   Click **OK** to add the delivery and close the Add Delivery window. The system returns to the Transportation Details window. The new delivery is added to the Delivery table.

   •   Click **OK and Add Another** to add additional deliveries.

   •   Click **Cancel** to reject all entries and exit the Add Delivery window. The system returns to the Transportation Details window.

8.   After you have added all necessary deliveries, choose one of the following options.

   •   Click **Save** to save your changes.

   •   Click **Save and Close** to save your changes and close the Transportation Details window.

   •   Click **Cancel** to reject all changes and close the Transportation Details window.

Delete a Delivery

To delete a delivery from a transportation follow the steps listed below.

1. From the Tasks menu, select **Trade Management > Transportation > Manage Transportation.** The Transportation Search window appears.

2. Enter or select search criteria as desired to make the search more restrictive.

3. Click **Search**. The transportations that match the search criteria are displayed in the Results section.

4. Select a record in the Results section.

5. In the transportation column, click on the transportation link, or mark a record and select **Actions > Edit** or use the Edit icon. The Transportation window appears.

6. In the Transportation Toolbar select **Details**. The Transportation Details window appears.

7. In the Delivery table, select a delivery.

8. Click **Actions > Delete** or use the Delete icon to delete the selected delivery.

9. You are prompted if you want to delete the selected delivery from the Delivery table. Confirm with **Yes**.

10. The delivery is removed from the Delivery table.

11. After you have deleted all necessary records, choose one of the following options.

    - Click **Save** to save your changes.

    - Click **Save and Close** to save your changes and close the Transportation Details window.

    - Click **Cancel** to reject all changes and close the Transportation Details window.

Add Packing Information

To add a packing information to a transportation follow the steps listed below.

1. From the Tasks menu, select **Trade Management > Transportation > Manage Transportation**. The Transportation Search window appears.

2. Enter or select search criteria as desired to make the search more restrictive.

3. Click **Search**. The transportations that match the search criteria are displayed in the Results section.

4. Select a record in the Results section.

5. In the Transportation column, click on the transportation link, or mark a record and select **Actions > Edit** or use the Edit icon. The Transportation window appears.

6. In the **More Actions** menu select **Details**. The Transportation Details window appears.

7. In the Packing table, select **Actions > Add** or use the Add icon. The Add Packing window appears.

Figure 2-4 Add Packing Window

a. In the **From Carton** field, enter the ID of the first carton of a series. This field is a required field.

b. In the **To Carton f**ield, enter the ID of the last carton of a series. This field is a required field.

c. In the **Loaded Position** field, select the position of a load within a series from the list.

d. In the **Sample Carton** field, enter the sample carton.

e. In the **Sample Position** field, select the sample position from a list.

f. In the **Comments** field, enter a comment for the packing information, if necessary.

g. In the **Quantity** column, enter one of following options.

   • In the **Carton** field, enter the carton quantity. Then enter, select or search for the carton quantity UOM.

   • In the **Carton Pack** field, enter the carton pack quantity. Then enter, select or search for the carton pack quantity UOM.

   • In the **Item** field, enter the item quantity. Then enter, select or search for the item quantity UOM.

h. In the **Received Quantity** column, enter one of the following options.

   • In the **Carton** field, enter the received carton quantity. Then enter, select or search for the carton quantity UOM.

   • In the **Carton Pack** field, enter the received carton pack quantity. Then enter, select or search for the carton pack quantity UOM.

   • In the **Item** field, enter the received item quantity. Then enter, select or search for the item quantity UOM.

i. Then choose one of the following options.

   • Click **OK** to add the delivery and close the Add Packing window. The system returns to the Transportation Details window. The new packing information is added to the Packing table.

   • Click **OK and Add Another** to add further records.

- Click **Cancel** to reject all entries and close the Add Packing window. The system returns to the Transportation Details window.

8. After you have added all necessary records, choose one of the following options.

- Click **Save** to save your changes.

- Click **Save and Close** to save your changes and close the Transportation Details window.

- Click **Cancel** to reject all changes and close the Transportation Details window.

Edit a Packing Information

To edit a packing information follow the steps below.

1. From the Tasks menu, select **Trade Management > Transportation > Manage Transportation**. The Transportation Search window appears.

2. Enter or select search criteria as desired to make the search more restrictive.

3. Click **Search**. The transportations that match the search criteria are displayed in the Results section.

4. Select a record in the Results section.

5. In the Transportation column, click on the transportation link, or mark a record and select **Actions > Edit** or use the Edit icon. The Transportation window appears.

6. In the **More Actions** menu select **Details**. The Transportation Details window appears.

7. In the Packing table, select **Actions > Edit** or use the Edit icon. The Edit Packing window appears.

Figure 2-5   Edit Packing Window

a. All previously entered fields are populated. Change the values in the appropriate fields, if necessary.

b. Then choose one of the following options.

- Click **OK** to save the changes and close the Edit Packing window. The system returns to the Transportation Details window. The packing information is updated.

- Click **Cancel** to reject all entries and close the Edit Packing window. The system returns to the Transportation Details window.

8. After you have added all necessary records, choose one of the following options.

   • Click **Save** to save your changes.

   • Click **Save and Close** to save your changes and close the Transportation Details window.

   • Click **Cancel** to reject all changes and close the Transportation Details window.

Delete Packing Information

To delete a packing information from a transportation follow the steps listed below.

1. From the Tasks menu, select **Trade Management > Transportation > Manage Transportation**. The Transportation Search window appears.

2. Enter or select search criteria as desired to make the search more restrictive.

3. Click **Search**. The transportations that match the search criteria are displayed in the Results section.

4. Select a record in the Results section.

5. In the transportation column, click on the transportation link, or mark a record and select **Actions > Edit** or use the Edit icon. The Transportation window appears.

6. In the Transportation Toolbar select **Details**. The Transportation Details window appears.

7. In the Packing table, select a packing information.

8. Click **Actions > Delete** or use the Delete icon to delete the selected packing information.

9. You are prompted if you want to delete the selected packing from the Packing table. Confirm with **Yes**.

10. The packing information is removed from the Packing table.

11. After you have deleted all necessary records, choose one of the following options.

    • Click **Save** to save your changes.

    • Click **Save and Close** to save your changes and close the Transportation Details window.

    • Click **Cancel** to reject all changes and close the Transportation Details window.

Add a License/Visa

To add a licence/visa information to a transportation follow the steps listed below.

1. From the Tasks menu, select **Trade Management > Transportation > Manage Transportation**. The Transportation Search window appears.

2. Enter or select search criteria as desired to make the search more restrictive.

3. Click **Search**. The transportations that match the search criteria are displayed in the Results section.

4. Select a record in the Results section.

5. In the Transportation column, click on the transportation link, or mark a record and select **Actions > Edit** or use the Edit icon. The Transportation window appears.

6. In the **More Actions** menu select **Details**. The Transportation Details window appears.

7. In the Licence/Visa table, select **Actions > Add** or use the Add icon. The Add Licence/Visa window appears.

Figure 2-6   Add Licence/Visa Window

a. In the **Type** field, select licence or visa from the list. This field is a required field.

b. In the **Licence/Visa** field, enter the licence or visa number. This field is a required field.

c. In the **Import Country** field, enter, select or search for the import country. This field is a required field.

d. In the **Quantity** field, enter the appropriated quantity. Then enter, select or search for the quantity unit of measure.

e. In the **Quota Category** field, enter, select or search for the appropriate quota category.

f. In the **Net/Net Weight** field, enter the net weight. Then enter, select or search for the weight unit of measure.

g. In the **Holder** field, enter the holder of the licence/visa.

h. In the **Comments** field, enter a comment for the licence/visa, if necessary.

      i.   Then choose one of the following options.

- Click **OK** to add the licence/visa and close the Add Licence/Visa window. The system returns to the Transportation Details window. The new licence/visa information is added to the Licence/Visa table.

- Click **OK and Add Another** to add additional records.

- Click **Cancel** to reject all entries and exit the Add Licence/Visa window. The system returns to the Transportation Details window.

8. After you have added all necessary records, choose one of the following options.

- Click **Save** to save your changes.

- Click **Save and Close** to save your changes and close the Transportation Details window.

- Click **Cancel** to reject all changes and close the Transportation Details window.

Edit a Licence/Visa

To edit a licence/visa information follow the steps below.

1. From the Tasks menu, select **Trade Management > Transportation > Manage Transportation**. The Transportation Search window appears.

2. Enter or select search criteria as desired to make the search more restrictive.

3. Click **Search**. The transportations that match the search criteria are displayed in the Results section.

4. Select a record in the Results section.

5. In the Transportation column, click on the transportation link, or mark a record and select **Actions > Edit** or use the Edit icon. The Transportation window appears.

6. In the **More Actions** menu select **Details**. The Transportation Details window appears.

7. In the Licence/Visa table, select **Actions > Edit** or use the Edit icon. The Edit Licence/Visa window appears.

Figure 2-7   Edit Licence/Visa Window

a. All previously entered fields are populated. Change the values in the appropriate
    fields, if necessary.

b. Then choose one of the following options.

• Click **OK** to save the changes and close the Edit Licence/Visa window. The
   system returns to the Transportation Details window. The licence/visa information
   is updated.

• Click **Cancel** to reject all entries and exit the Edit Licence/Visa window. The
   system returns to the Transportation Details window.

8. Then choose one of the following options.

• Click **Save** to save your changes.

• Click **Save and Close** to save your changes and close the Transportation Details
   window.

• Click **Cancel** to reject all changes and close the Transportation Details window.

Delete a Licence/Visa

To delete a licence/visa information from a transportation follow the steps listed below.

1. From the Tasks menu, select **Trade Management > Transportation > Manage
    Transportation**. The Transportation Search window appears.

2. Enter or select search criteria as desired to make the search more restrictive.

3. Click **Search**. The transportations that match the search criteria are displayed in the Results section.

4. Select a record in the Results section.

5. In the transportation column, click on the transportation link, or mark a record and select **Actions > Edit** or use the Edit icon. The Transportation window appears.

6. In the Transportation Toolbar select **Details**. The Transportation Details window appears.

7. In the Licence/Visa table, select the licence/visa information.

8. Click **Actions > Delete** or use the Delete icon to delete the selected licence/visa information.

9. You are prompted if you want to delete the selected licence/visa from the Licence/Visa table. Confirm with **Yes**.

10. The licence/visa information is removed from the Licence/Visa table.

11. Then choose one of the following options.

    • Click **Save** to save your changes.

    • Click **Save and Close** to save your changes and exit the Transportation Details window.

    • Click **Cancel** to reject all changes and exit the Transportation Details window.

Add a Claim

To add a claim to a transportation follow the steps listed below.

1. From the Tasks menu, select **Trade Management > Transportation > Manage Transportation**. The Transportation Search window appears.

2. Enter or select search criteria as desired to make the search more restrictive.

3. Click **Search**. The transportations that match the search criteria are displayed in the Results section.

4. Select a record in the Results section.

5. In the Transportation column, click on the transportation link, or mark a record and select **Actions > Edit** or use the Edit icon. The Transportation window appears.

6. In the **More Actions** menu select **Details**. The Transportation Details window appears.

7. In the Claims table, select **Actions > Add** or use the Add icon. The Add Claim window appears.

Figure 2-8   Add Claim Window

a. In the **Claim** field, enter the claim ID. This field is a required field.

b. In the **From Carton**, enter the ID of the first carton of a series. This field is a required field.

c. In the **To Carton**, enter the ID of the last carton in a series. This field is a required field.

d. In the **Date** field, enter the claim date or use the Calendar icon to select the date. This field is a required field.

e. In the **Quantity** field, enter the quantity. Then enter, select or search for the quantity unit of measure. These fields are required fields.

f. In the **Claim Against** field, select who you want to add a claim against. For example, select Agent. Then select the claim against ID. These fields are required fields.

g. In the **Amount** field, enter the amount of the claim.

h. In the **Discrepancy Type** field, select the appropriate type from the list. Possible types are Overage or Shortage.

i. In the **Damage Code** field, select the appropriate code from the list. For example, select external damage.

j. In the **Comments** field, enter a comment for the licence/visa, if necessary.

k. Then choose one of the following options.

- Click **OK** to add the claim and close the Add Claim window. The system returns to the Transportation Details window. The new claim is added to the Claims table.

- Click **OK and Add Another** to add additional records.

- Click **Cancel** to reject all entries and close the Add Claims window. The system returns to the Transportation Details window.

8. After you have added all necessary records, choose one of the following options.

- Click **Save** to save your changes.

- Click **Save and Close** to save your changes and close the Transportation Details window.

- Click **Cancel** to reject all changes and close the Transportation Details window.

Edit a Claim

To edit a claim follow the steps below.

1. From the Tasks menu, select **Trade Management > Transportation > Manage Transportation**. The Transportation Search window appears.

2. Enter or select search criteria as desired to make the search more restrictive.

3. Click **Search**. The transportations that match the search criteria are displayed in the Results section.

4. Select a record in the Results section.

5. In the Transportation column, click on the transportation link, or mark a record and select **Actions > Edit** or use the Edit icon. The Transportation window appears.

6. In the **More Actions** menu select **Details**. The Transportation Details window appears.

7. In the Claims table, select **Actions > Edit** or use the Edit icon. The Edit Claim window appears.

Figure 2-9   Edit Claim Window

a. All previously entered fields are populated. Change the values in the appropriate fields, if necessary.

b. Then choose one of the following options.

- Click **OK** to save the changes and close the Edit Claim window. The system returns to the Transportation Details window. The claim information is updated.

- Click **Cancel** to reject all entries and close the Edit Claim window. The system returns to the Transportation Details window.

8. After you have added all necessary records, choose one of the following options.

- Click **Save** to save your changes.

- Click **Save and Close** to save your changes and close the Transportation Details window.

- Click **Cancel** to reject all changes and close the Transportation Details window.

Delete a Claim

To delete claim from a transportation follow the steps listed below.

1. From the Tasks menu, select **Trade Management > Transportation > Manage Transportation**. The Transportation Search window appears.

2. Enter or select search criteria as desired to make the search more restrictive.

3. Click **Search**. The transportations that match the search criteria are displayed in the Results section.

4. Select a record in the Results section.

5. In the transportation column, click on the transportation link, or mark a record and select **Actions > Edit** or use the Edit icon. The Transportation window appears.

6. In the Transportation Toolbar select **Details**. The Transportation Details window appears.

7. In the Claims table, select a claim.

8. Click **Actions > Delete** or use the Delete icon to delete the selected claim.

9. You are prompted if you want to delete the selected claim from the Claims table. Confirm with **Yes**.

10. The claim is removed from the Claims table.

11. After you have deleted all necessary records, choose one of the following options.

    • Click **Save** to save your changes.

    • Click **Save and Close** to save your changes and close the Transportation Details window.

    • Click **Cancel** to reject all changes and close the Transportation Details window.

Shipments

In the Transportation Shipments window you can manage associations of shipments with a PO or a transportation record.

The Transportation Shipments window contains the following sections.

• Transportation Shipments Header

• Transportation Shipments Table

Transportation Shipments Header

The Transportation Shipments header contains the following transportation information.

• Vessel ID

• Voyage/Flight number

• Estimated Departure Date

• Container

• Bill of Lading/Airway Bill

• Commercial Invoice

• Order Number

• Item

Transportation Shipments Table

The Transportation Shipments table contains information such as shipment, advanced shipping notice (ASN), and shipped as well as received date, the to location and the location name.

Add a Shipment

To add a shipment to a transportation follow the steps listed below.

1. From the Tasks menu, select **Trade Management > Transportation > Manage Transportation**. The Transportation Search window appears.

2. Enter or select search criteria as desired to make the search more restrictive.

3. Click **Search**. The transportations that match the search criteria are displayed in the Results section.

4. Select a record in the Results section.

5. In the Transportation column, click on the transportation link, or mark a record and select **Actions > Edit** or use the Edit icon. The Transportation window appears.

6. In the **More Actions** menu select **Shipments**. The Transportation Shipments window appears.

7. In the table, select **Actions > Add** or use the Add icon. The Add Shipment window appears.

Figure 2-10   Add Shipments Window

a. The Add Shipments table displays shipments that are not associated with the PO/transportation record.

b. In the table select all the shipments you want to associate with the current transportation.

c. Then choose one of the following options.

- Click **OK** to add the shipments and close the Add Shipments window. The system returns to the Transportation Shipments window. The new shipments are added to the Transportation Shipments table.

- Click **Cancel** to reject all entries and close the Add Shipments window. The system returns to the Transportation Shipments window.

8. After you have added all necessary shipments, choose one of the following options.

- Click **Save** to save your changes.

- Click **Save and Close** to save your changes and close the Transportation Shipments window.

- Click **Cancel** to reject all changes and close the Transportation Shipments window.

Delete a Shipment

To delete a shipment from a transportation follow the steps listed below.

1. From the Tasks menu, select **Trade Management > Transportation > Manage Transportation**. The Transportation Search window appears.

2. Enter or select search criteria as desired to make the search more restrictive.

3. Click **Search**. The transportations that match the search criteria are displayed in the Results section.

4. Select a record in the Results section.

5. In the transportation column, click on the transportation link, or mark a record and select **Actions > Edit** or use the Edit icon. The Transportation window appears.

6. In the **More Actions** menu select **Shipments**. The Transportation Shipments window appears.

7. In the Transportation Shipments table, select a shipment.

8. Click **Actions > Delete** or use the Delete icon to delete the selected shipment.

9. You are prompted if you want to delete the selected shipment from the Transportation Shipments table. Confirm with **Yes**.

10. The shipment is removed from the Transportation Shipments table.

11. After you have deleted all necessary records, choose one of the following options.

- Click **Save** to save your changes.

- Click **Save and Close** to save your changes and close the Transportation Shipments window.

- Click **Cancel** to reject all changes and close the Transportation Shipments window.

Timelines

A timeline refers to a schedule of events that can be attached to an activity to track its life cycle. Possible timeline types are.

- Item

- Purchase Order

- Order/Item

- Customs Entry

- Transportation

- Transportation PO/Item

- Container

- BOL/AWB

- Commercial Invoice

- PO BOL/AWB

You can add timelines to the values listed above. You can attach a date to each step linked with an activity and monitor the completion of the activity. You can also modify the dates based on the changes in the schedule of related activity and add a relevant reason/comment for the change.

The Timelines Window contains the following sections.

- Timeline Header

  The Timeline header varies according to your selected timeline type. For example, if you want to add a timeline for a purchase order, the purchase order number is displayed in the Timeline header.

- Timelines

- Timeline Details

Figure 2-11   Transportation Timeline Window
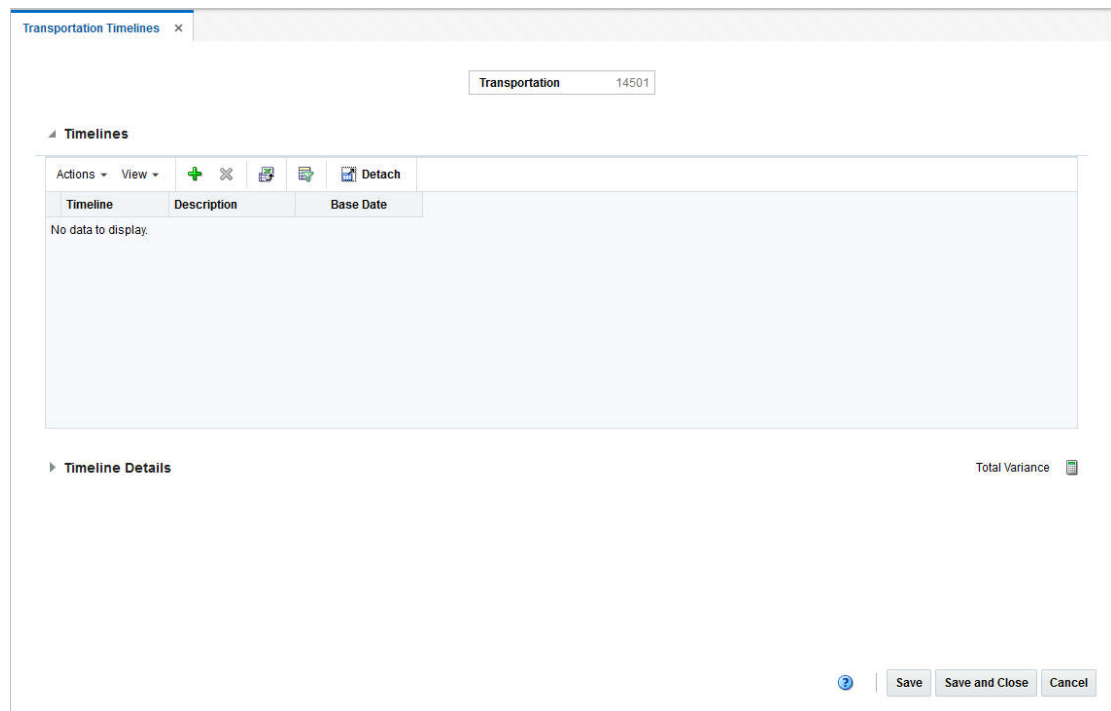
Timelines

In the timelines section you can add or delete a timeline to/from the selected timeline type.

Timeline Details

In the Timeline Details section you can view the reason and comments for a modified step within a timeline. You can also delete a timeline detail from the entry.

Timeline Details Table - Actions Menu and Icons

Use the Actions Menu and Icons to apply actions to the table. You can perform the actions listed below, as well as action described in "Action Menu and Icons" in the *Oracle Retail Trade Management Do the Basics User Guide*.

Table 2-8   Timeline Details Table - Actions Menu/Icons and Description

Actions Menu/Icons	Description
Calculate Revised Dates	Use the **Calculate Revised Dates** button to recalculate Base or Original dates. Follow the steps below. • Enter the Base Date. • Select **Calculate Revised Dates**. • All the Original Dates are calculated automatically, based on the entered Base Date. If you enter the Original Date, the Base Date is recalculated. If you enter both, Base and Original date, you receive an error message.

Add Timelines

To add a timeline to an entry, follow the steps listed below.

1. From the Tasks menu, select **Trade Management > Transportation > Manage Transportation**. The Transportation window appears.

2. Enter or select search criteria as desired to make the search more restrictive.

3. Click **Search**. The transportations that match the search criteria are displayed in the Results section.

4. Select a record in the Results section.

5. In the Transportation column, click on the transportation link, or mark a record and select **Actions > Edit** or use the Edit icon. The Transportation window appears.

6. In the **More Actions** menu select **Timelines**. In the submenu choose for which entry you want to add timelines.

   • Transportation

   • Order/Item

   • Container

   • BOL/AWB

- Commercial Invoice

    The Timeline window appears.

7. In the Timeline table, select **Actions > Add** or use the Add icon. The Add Timeline window appears.

    Figure 2-12   Add Timeline Window

    a. In the **Timeline** field, enter, select or search for the step number you want to add a timeline for. This field is a required field.

    b. In the **Base Date** field, enter or use the Calendar icon to select a date.

    c. Then choose one of the following options.

        - Click **OK** to add the timeline and close the Add Timeline window. The system returns to the Timeline window. The new timeline is added to the Timeline table.

        - Click **OK and Add Another** to add additional timelines.

        - Click **Cancel** to reject all entries and exit the Add Timeline window. The system returns to the Timelines window.

8. After you have added all necessary timelines, choose one of the following options.

    - Click **Save** to save your changes.

    - Click **Save and Close** to save your changes and close the Timelines window.

    - Click **Cancel** to reject all changes and close the Timelines window.

Delete Timelines

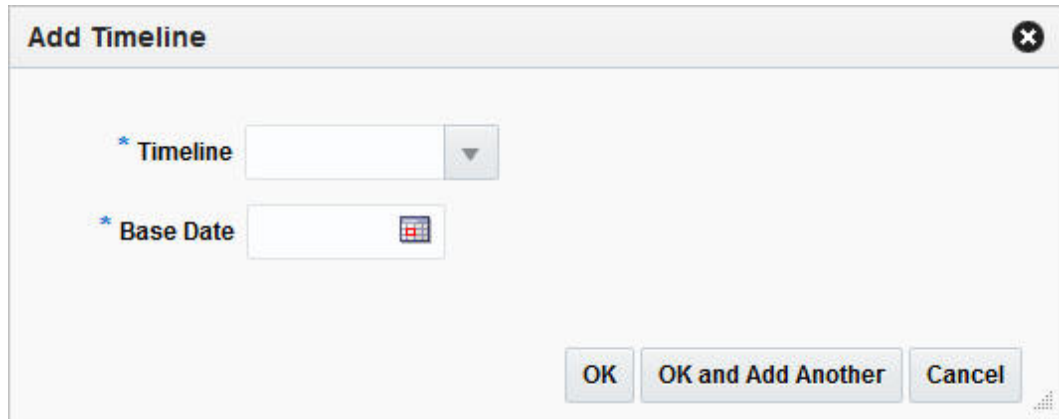To delete a timeline from an entry, follow the steps listed below.

1. From the Tasks menu, select **Trade Management > Transportation > Manage Transportation**. The Transportation Search window appears.

2. Enter or select search criteria as desired to make the search more restrictive.

3. Click **Search**. The transportations that match the search criteria are displayed in the Results section.

4. Select a record in the Results section.

5. In the Transportation column, click on the transportation link, or mark a record and select **Actions > Edit** or use the Edit icon. The Transportation window appears.

6. In the **More Actions** menu select **Timelines**. In the sub menu select the appropriate timeline type. The Timelines window appears.

7. In the Timeline table, select **Actions > Delete** or use the Delete icon.

8. Confirm the displayed prompt with **Yes**. The record is deleted from the table.

9. After you have deleted all necessary records, choose one of the following options.

   - Click **Save** to save your changes.

   - Click **Save and Close** to save your changes and exit the Timeline window.

   - Click **Cancel** to reject all changes and exit the Timeline window.

Edit Timeline Details

To edit a timeline detail of an entry, follow the steps listed below.

1. In the Timeline Details table, select a record and edit the following columns, if necessary.

   - **Revised Date**

     Enter or use the Calendar icon to select a new date for an activity.

   - **Actual Date**

     Enter or use the Calendar icon to select the actual date for an activity.

   - **Reason**

     Enter, select or search for a reason for the timeline change.

   - **Comments**

     Enter or change comments for the activity.

   > **Note:**
   >
   > The original date is populated, when you enter the base date in the Add Timeline window. You can only modify the **Base** and **Original Date** field during the timeline definition. Once a timeline has been attached to an activity, you can no longer update these fields.

2. After you have changed all necessary data, choose one of the following options.

   - Click **Save** to save your changes.

   - Click **Save and Close** to save your changes and close the Timeline window.

   - Click **Cancel** to reject all entries and close the Timeline window.

Delete Timeline Details

To delete a timeline detail from an entry, follow the steps listed below.

1. In the Timeline Details table, select a record.

2. Then select **Actions > Delete** or use the Delete icon.

3. Confirm the displayed prompt with **Yes**. The record is deleted from the table.

4. After you have deleted all necessary records, choose one of the following options.

   • Click **Save** to save your changes.

   • Click **Save and Close** to save your changes and exit the Timeline window.

   • Click **Cancel** to reject all changes and exit the Timeline window.

Items

The Transportation Items window allows you to add, edit and view child items for an item parent on an order.

> **✎ Note:**
>
> This menu option is only enabled, if you entered a parent item in the **Item** field in the Transportation window.

Figure 2-13   Transportation Items Window

The Transportation Item window contains the following sections.

• Transportation Items Header

   The header displays the transportation ID, the vessel and voyage/flight number, the estimated departure date, container, bill of lading/airway bill, the commercial invoice, and order number as well as parent item information.

- Transportation Items Table

Transportation Items Table

The Transportation Items table lists the child items added to the transportation record. You can add and delete records from this table. Furthermore, you can edit the **Quantity** and **UOM** field values directly in the table.

The Transportation Item table contains the following columns by default.

- Item

- Description

- Diff 1-4

- Quantity

  You can edit the quantity of the child item directly in the table.

- UOM (Unit of Measure)

  You can edit the UOM of the child item directly in the table.

Add Child Items

To add child items to a transportation of an order, follow the steps below.

1. From the Tasks menu, select **Trade Management > Transportation > Manage Transportation**. The Transportation Search window appears.

2. Enter or select search criteria as desired to make the search more restrictive.

3. Click **Search**. The transportations that match the search criteria are displayed in the Results section.

4. Select a record in the Results section.

5. In the Transportation column, click on the transportation link, or mark a record and select **Actions > Edit** or use the Edit icon. The Transportation window appears.

6. In the **More Actions** menu select **Items**. The Transportation Items window appears.

7. In the Transportation Items table, select **Actions > Add** or use the Add icon. The Add Item window appears.

Figure 2-14   Add Item Window

a. Select if you want to add the child items individually or if you want to add all the child items on the order.

b. In the **Items** field, enter or use the Search icon to search for the appropriate child item.

> **Note:**
>
> If you have selected the **Add All Child Items on Order** checkbox, the **Item** field is disabled.

c. In the **Quantity** field, enter the appropriate quantity. Then enter, select or search for the item quantity UOM.

d. Then choose one of the following options.

   - Click **OK** to add the child item and close the Add Item window. The system returns to the Transportation Items window. The new child items is added to the Transportation Items table.

   - Click **OK and Add Another** to add additional child items.

   - Click **Cancel** to reject all entries and exit the Add Items window. The system returns to the Transportation Items window.

8. After you have added all necessary child items, choose one of the following options.

   - Click **Save** to save your changes.

   - Click **Save and Close** to save your changes and close the Transportation Items window.

   - Click **Cancel** to reject all changes and close the Transportation Items window.

Delete Child Items

To delete a child item of a transportation, follow the steps below.

1. From the Tasks menu, select **Trade Management > Transportation > Manage Transportation**. The Transportation Search window appears.

2. Enter or select search criteria as desired to make the search more restrictive.

3. Click **Search**. The transportations that match the search criteria are displayed in the Results section.

4. Select a record in the Results section.

5. In the Transportation column, click on the transportation link, or mark a record and select **Actions > Edit** or use the Edit icon. The Transportation window appears.

6. In the **More Actions** menu select **Items**. The Transportation Items window appears.

7. In the Transportation Items table, select the child item you want to delete.

8. Then select **Actions > Delete** or use the Delete icon.

9. You are prompted if you want to delete the selected record. Confirm the prompt with Yes.

10. The selected child item is removed from the Transportation Items table.

11. After you have deleted all necessary child items, choose one of the following options.

- Click **Save** to save your changes.
- Click **Save and Close** to save your changes and close the Transportation Items window.
- Click **Cancel** to reject all changes and close the Transportation Items window.

Create a Transportation by Order

In the Create Transportation by Order window you can enter and edit items, related shipments and other information for a specific purchase order. After populating all the information in the header you can query the details. In addition, you can edit or mass edit records.

The Create Transportation by Order window contains the following sections.

- Create Transportation by Order Header
- Details

Figure 2-15   Create Transportation by Order

Create Transportation by Order Header

The header contains the following fields and button.

Table 2-9   Create Transportation by Order Header - Fields/Buttons and Description

Fields/Buttons	Description
Order No.	Enter select or search for the appropriate order number. This field is a required field.
Vessel	Enter the vessel ID. This field is a required field.
Voyage/Flight	Enter the voyage/flight number. This field is a required field.
Estimated Departure Date	Enter or use the Calendar icon to select an estimated departure date. This field is a required field.
Item Default Level	Select the item default level from the list. Possible levels are Transaction Level and Above Transaction Level.
Default Child/Diff checkbox	Select the Default Child/Diff checkbox to indicate that all transaction-level values (child/diffs) associated with the parent items will be defaulted. The quantity/UOM values will be rolled-up and displayed for each parent item.
	The parent item qty/UOM is non-editable when child records exist. The Child/Diff values may be edited by clicking the Items option. If the you delete all of the quantity values from the Item window, the Parent level quantities can then be edited. The parent-level Item quantity will be calculated based on the sum of child-level quantities in the Item window, the Item UOM value will also default to the parent-level.
Supplier Site	The supplier site is displayed. You cannot edit the supplier site.
Details button	Use the Details button, to query the details for the entered order information. The transportation details are displayed in the Details section.
	For more information about transportation details, see the Details section.

Details

The Details section lists details for the entered order information. You can add, edit and delete item information for the transportation.

Details Table - Actions Menu, Icons and Buttons

Use the Actions Menu, icons and buttons to apply actions to the table. You can perform the actions listed below, as well as action described in "Action Menu and Icons" in the *Oracle Retail Trade Management Do the Basics User Guide*.

Table 2-10   Details Table - Actions Menu/Icons/Buttons and Description

Actions Menu/Icons/Buttons	Description
Mass Update or **Mass Update** button	Opens the Mass Update window.
	For more information about how to perform a mass update, see the Mass Update section in "Manage Transportation".
Transportation	Opens the Transportation window.
	For more information about this function, see the Define a Transportation section.

Table 2-10   (Cont.) Details Table - Actions Menu/Icons/Buttons and Description

Actions Menu/Icons/Buttons	Description
Items	Opens the Transportation Items window.
	For more information about this function, see the Items section.

Create Transportation by Order - More Actions Menu

Use the More Actions menu to navigate to the following windows. The More Actions menu contains the following options.

Table 2-11   Create Transportation by Order - More Actions Menu

More Actions Menu	Description
Shipments	Opens the Transportation Shipments window. This window displays shipment information such as ASN, shipped and received date, to location and location name.
	For more information about shipments, see the Shipments section.
Details	Opens the Transportation Details window. This window displays a details of the delivery, packing, license/visa information as well as claims.
	For more information about transportation details, see the Details section.
Missing Documents	Opens the Missing Documents window. You can add and delete all the missing documents for the current transport in this window.
	For more information about missing documents, see the "Missing Documents" section in the *Oracle Retail Trade Management Customs Entry User Guide*.
Timelines	Opens the Timelines menu. The menu contains the following options.
	• Transportation
	Opens the Transportation Timelines window.
	• Order/Item
	Opens the Order/Item Timelines window.
	• Container
	Opens the Container Timelines window.
	• BOL/AWB (Bill of Lading/Airway Bill)
	Opens the BOL/AWB Timelines window.
	• Commercial Invoice
	Opens the Commercial Invoice Timelines window.
	• Order/BOL/AWB
	Opens the Order/BOL/AWB window.
	For more information about timelines, see the Timelines section.

Create a Transportation by Order

To create a transportation by order follow the steps below.

1. From the Tasks menu, select **Trade Management > Create Transportation by Order**. The Create Transportation by Order window appears.

2. Enter, select or search for the necessary order information. For more information, about what do add in the Create Transportation header, see the Create Transportation by Order Header section.

3. Click **Details**. The details for the entered order information is displayed in the Detail section.

   • Add items to the transportation by order. For more information about how to add items to the transportation by order, see the Add Items section.

   • Edit item of the transportation by order. For more information about how to edit items of a transportation by order, see the Edit Items section.

   • Delete items form the transportation by order. For more information about how to delete items from a transportation by order, see the Delete Items section.

   • Update multiple items of a transportation by order. For more information about how to update multiple items from a transportation by order, see the Mass Update section in "Manage Transportation".

4. After you have made all the necessary changes, choose one of the following options.

   • Click **Save and Close**, to save changes to the transportation and exit the Create Transportation by Order window.

   • Click the arrow on the right side of the button to display the additional save options.

     – Click **Save** to save your entries.

     – Click **Save and Create Another** to save the current transportation and create additional entries.

Add Items

To add an item to a transportation by order, follow the steps below.

1. In the Details table, select **Actions > Add** or use the Add icon. The Add Item window appears.

Figure 2-16   Add Item Window

    a. In the **Item** field, enter or use the Search icon to search for the appropriate item. This field is a required field.

    b. In the **Container** field, enter the container ID.

    c. In the **BOL/AWB** field, enter the bill of lading or airway bill number.

    d. In the **Commercial Invoice** field, enter the commercial invoice number. This filed is a required field.

    e. In the **Invoice Date** field, enter or use the Calendar icon to select a date. This field is a required field.

    f. In the **Invoice Amount** field, enter the invoice amount.

    g. In the **Exchange Rate** field the current rate is displayed. If you need to edit the displayed exchange rate, see the "Editing the Exchange Rate" section in the *Oracle Retail Trade Management Letters of Credit User Guide*.

    h. In the **Item Quantity** field, enter the appropriate quantity. Then select the item quantity unit of measure.

    i. In the **Carton Quantity** field, enter the appropriate quantity. Then select the carton quantity unit of measure.

    j. In the **Gross Weight** field, enter the appropriate weight. Then select the weight unit of measure.

    k. In the **Net Weight** field, enter the appropriate weight. Then select the weight unit of measure.

    l. In the **Cubic** field, there appropriate cubic amount. Then select the cubic unit of measure.

    m. Then choose one of the following options.

        • Click **OK** to save your entries and close the Add Item window.

        • Click **OK and Add Another** to add additional records.

        • Click **Cancel** to reject all entries and close the Add Item window.

2. After you have made all the necessary changes, choose one of the following options.

    • Click **Save and Close**, to save changes to the transportation and close the Create/Manage Transportation by Order window.

    • Click the arrow on the right side of the button to display the additional save options.

        – Click **Save** to save your entries.

        – Click **Save and Create Another/Save and Edit Another** to save the current transportation and create additional entries.

    • Click **Cancel** to reject all entries and close the Create/Manage Transportation by Order window.

Edit Items

To edit items of a transportation by order, follow the step listed below.

1. In the Details table, select **Actions > Edit** or use the Edit icon. The Edit Item window appears.

Figure 2-17   Edit Item Window

a. The item information of the current item is displayed. Update the field as necessary.

b. Then choose one of the following options.

- Click **OK** to save your entries and close the Edit Item window.

- Click **Cancel** to reject all entries and close the Edit Item window.

2. After you have made all the necessary changes, choose one of the following options.

- Click **Save and Close**, to save changes to the transportation and close the Create/Manage Transportation by Order window.

- Click the arrow on the right side of the button to display the additional save options.

  - Click **Save** to save your entries.

  - Click **Save and Create Another/Save and Edit Another** to save the current transportation and create additional entries.

- Click **Cancel** to reject all entries and exit the Create/Manage Transportation by Order window.

Delete Items

To delete items from an transportation by order follow the steps below.

1. In the Details table, select the item you want to delete from the transportation.

2. Then select **Actions > Delete** or use the Delete icon.

3. You are prompted if you want to delete the record. Confirm the prompt with **Yes**.

4. The item is deleted from the Details table.

5. Then choose one of the following options.

- Click **Save and Close**, to save changes to the transportation and close the Create/Manage Transportation by Order window.

- Click the arrow on the right side of the button to display the additional save options.

  - Click **Save** to save your entries.

- Click **Save and Create Another/Save and Edit Another** to create additional entries.

- Click **Cancel** to reject all entries and close the Create/Manage Transportation by Order window.

3

Manage Transportation

Manage a Transportation

The Manage Transportation option opens the Transportation Search window. In the Transportation Search window you can search, maintain and view transportations.

You can access the Transportation Search window from the Task menu, select **Trade Management > Transportation > Manage Transportation**. The Transportation Search window appears.

The Transportation Search window contains the following two sections.

- Search

    For more information about how to search for a transportation, see the Search for a Transportation section.

- Results

Figure 3-1   Transportation Search Window

Search for a Transportation

To search for a transportation:

1. From the Task menu, select **Trade Management > Transportation > Manage Transportation**. The Transportation Search window appears.

2. You can search for a transportation by using basic or advanced search criteria, depending on the requirement. The basic mode is the default search mode.

   • Click **Advanced** to access the search section in advanced mode.

   • Click **Basic** to return to the basic mode.

Search for a Transportation Through the Basic Search Criteria

To search for a transportation using basic search criteria:

1. Enter, select or search for one or all of the following basic search criteria.

Table 3-1   Transportation Search - Basic Search Criteria and Description

Fields	Description
Match option	Check radio button All or Any.
	All - only transportations matching all entered search criteria are shown.
	Any - transportations matching each entered search criteria are shown.
Transportation	Enter the transportation ID.
Status	Select the transportation status. For example, select Booked.
Vessel	Enter the vessel ID.
Voyage/Flight	Enter the voyage/flight number.
Estimated Departure Date	Enter or use the Calendar icon to select the estimated departure date.
BOL/AWB	Enter the bill of lading or airway bill.
Container	Enter the container ID.
Order No.	Enter, select or search for the order number.
Item	Enter the item number or use the Search icon to search for the appropriate item.
Commercial Invoice	Enter the commercial invoice number.

2. Click **Search**. The transportations that match the search criteria are displayed in the Results section.

3. Click **Reset** to clear the search section and results.

4. Click **Done** to close the window.

Search for a Transportation Through Advanced Search Criteria

To search for a transportation using advanced search criteria:

1. To search using advanced search criteria, enter or select one or all of the advanced search criteria.

2. To narrow down the search, use the list next to the search fields. For example, determine if the entered value should equal or not equal the search result.

3. Click **Search**. The transportations that match the search criteria are displayed in the Results section.

4. Click **Reset** to clear the search section and results.

5. Click **Add Fields** to add more fields for the advanced search. To remove the field from the search, click the x right next to the field.

6. Click **Done** to close the window.

Results

The Results section lists the retrieved transportations. The Results table shows the following columns by default.

- Transportation ID
- Status
- Vessel
- Voyage/Flight
- Estimated Departure Date
- BOL/AWB
- Container
- Order No.
- Item
- Commercial Invoice

Mark a Transportation Record as a Candidate

Transportation records must be marked as candidates to be used to systematically generate customs entries. To be eligible for marking as a candidate, the transportation record must contain the following information at a minimum:

- Vessel
- Voyage/Flight
- Estimated Departure Date
- Purchase Order
- Item
- Item Quantity and Unit of Measure
- Commercial Invoice
- Commercial Invoice Date
- Commercial Invoice Amount, Currency, and Exchange Rate

To mark the transportation record as a candidate, after the minimum data and any additional data has been entered, check the **Candidate** checkbox at the top of the Transportation page.

Figure 3-2   Transportation Page

A separate transportation record will be created for each Vessel, Voyage/Flight, Bill of Lading/Airway Bill, Container, Purchase Order, Item, Commercial Invoice combination. Therefore, a single shipment may be represented by multiple transportation records. When all of the transportation records for a given shipment have been marked as candidates, the transportation shipment can be finalized through the Transportation Finalization page, which will generate customs entries based on the data defined on the transportation records. See "Finalize Transportation" for more information about finalizing a transportation.

Manage Transportation by Order

The Manage Transportation by Order window allows you to search and maintain transportations for an order.

The Manage Transportation by Order window contains the same sections and functions as the Create Transportation by Order window.

For more information about the available sections and functions to manage transportations by order, see the Create a Transportation by Order section in "Create a Transportation".

Search for a Transportation by Order

To search for transportations by order follow the steps below.

1. From the Tasks menu, select **Trade Management > Transportation > Manage Transportation by Order**. The Manage Transportation by Order window appears.

Figure 3-3   Manage Transportation by Order Window
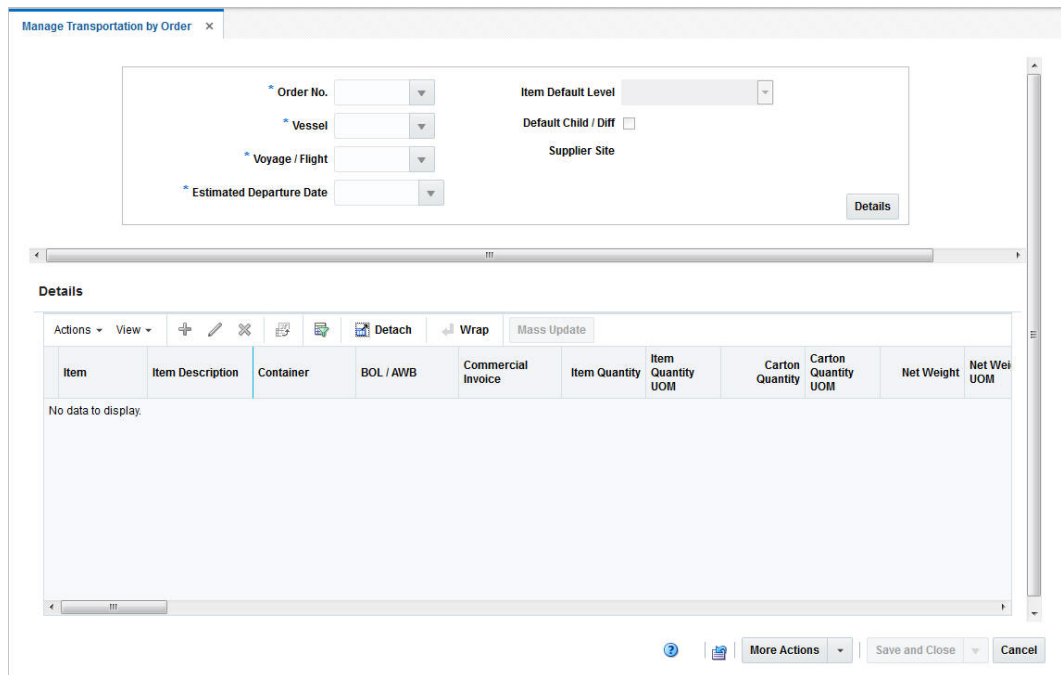
2. Enter or select search for the appropriate order number, vessel ID, voyage/flight number and estimated departure date for which the transportation record needs to be edited.

3. Click **Details**. The transportation details are displayed in Details table.

4. Then update the transportations as necessary.

    •   Add items to the transportation by order. For more information about how to add items to the transportation by order, see the Add Items section in "Create a Transportation".

    •   Edit item of the transportation by order. For more information about how to edit items of a transportation by order, see the Edit Items section in "Create a Transportation".

    •   Delete items from the transportation by order. For more information about how to delete items from a transportation by order, see the Delete Items section in "Create a Transportation".

    •   Update multiple items of a transportation by order. For more information about how to update multiple items from a transportation by order, see the Mass Update section.

5. Then choose one of the following options.

    •   Click **Save and Close**, to save changes to the transportation and close the Create/ Manage Transportation by Order window.

    •   Click the arrow on the right side of the button to display the additional save options.

        –   Click **Save** to save your entries.

        –   Click **Save and Create Another/Save and Edit Another** to save the current transportation and create additional entries.

    •   Click **Cancel** to reject all entries and exit the Create/Manage Transportation by Order window.

Mass Update

In the Mass Update window you can edit multiple items.

The Mass Update window contains the following sections.

- Apply Updates To
- Set Initial Values For
- Update
- Mass Update Toolbar

Figure 3-4   Mass Update Window

Apply Updates To

In the Apply Updates to section, enter, select or search for the values you want to apply the updates to.

Table 3-2   Apply Updates to - Fields and Description

Fields	Description
Item	Choose one of the following options from the list.
	• Select All Items, the **Item** field and the item search are disabled. The updates will be performed for all items.
	• Choose Single Item, the **Item** field and the item search are enabled. Enter or use the Search icon to search for the appropriate item. The updates will only be performed for the selected item.
Container	Enter, select or search for the appropriate container ID, you want to apply the update to.
BOL/AWB	Enter, select or search for the bill of lading or airway bill, you want to apply the update to.
Commercial Invoice	Enter, select or search for the commercial invoice, you want to apply the update to.

Set Initial Values For

In the Set Initial Values section you can enter only initial values for the container, the BOL/AWB and the commercial invoice. You cannot edit these values later.

Update

In the Update section, enter new values for those fields you want to update. The Update section displays the following fields.

Table 3-3   Updates - Fields and Description

Fields	Description
Status	Select the appropriate status from the list. For example, select status Loaded.
Commercial Invoice Date	Enter or use the Calendar icon to select the date.
Actual Departure Date	Enter or use the Calendar icon to select the date.
Estimated Arrival Date	Enter or use the Calendar icon to select the date.
Actual Arrival Date	Enter or use the Calendar icon to select the date.
Delivery Date	Enter or use the Calendar icon to select the date.
Shipment	Enter the shipment ID.
Receipt	Enter the receipt number.
Forwarder's Cargo Receipt	Enter the forwarder's cargo receipt number.
Forwarder's Cargo Receipt Date	Enter or use the Calendar icon to select the date.
In Transit	Enter In Transit number for shipments cleared at inland locations, or other than Discharge Port.
In Transit Date	Enter or use the Calendar icon to select the date.
Service Contract No.	Enter the service contract number.

Table 3-3   (Cont.) Updates - Fields and Description

Fields	Description
Lot	Enter the lot number.
Seal	Enter the seal number
Packing Method	Select the packing method from the list. For example, select Flat.
Partner Type	Select the partner type from the list. For example, select Agent.
Partner	This field is only enabled, if you have selected a partner type. Enter, select or search for the appropriate partner.
Lading Port	Enter, select or search for the lading port.
Discharge Port	Enter, select or search for the discharge port.
Container SCAC Code	Enter, select or search for the container SCAC code.
Vessel SCAC Code	Enter, select or search for the vessel SCAC code.
Freight Type	Enter, select or search for the freight type.
Freight Size	Enter, select or search for the freight size.
Consolidation Country	Enter, select or search for the consolidation country.
Origin Country	Enter, select or search for the origin country.
Export Country	Enter, select or search for the export country.
Shipment Method	Select the shipment method from the list.
Rush checkbox	Select the Rush checkbox to indicate that the transport is a rush shipment.
Candidate checkbox	Select the **Candidate** checkbox, if the record is complete and ready for finalization. The Candidate checkbox can only be selected for items that have an approved HTS code.
Comments	Enter comments, if necessary.

> **Note:**
>
> All fields are enabled by default. Check the **Clear Value** checkbox to disable the selected field. The field **Commercial Invoice** can not be cleared.

Mass Update Toolbar

The Toolbar displays the icons and buttons for actions that can be performed in the Mass Update window. The Toolbar contains the following icons and buttons.

Table 3-4   Mass Update Toolbar - Icons/Buttons and Description

Action Icons/Buttons	Description
Preserve Selected Values checkbox	Select the **Preserve Selected Values** checkbox, if you want to keep the values for later mass updates.

Table 3-4   (Cont.) Mass Update Toolbar - Icons/Buttons and Description

Action Icons/Buttons	Description
Refresh icon	Use the Refresh icon to clear all entered values in the Mass Update window. No values are saved.
OK	Click **OK t**o perform the updates as indicated and exit the Mass Update window.
Cancel	Click **Cancel** to reject all entries and exit the Mass Update window.

4

Finalize Transportation

In the Transportation Finalize window you can enter the entry number, import country, broker, and currency code to finalize the transportation record. When you enter the information in the Finalize Transportation window, the information is added to all records that match the vessel, voyage, and estimated departure date criteria.

> **Note:**
>
> A transportation record must be marked as a Candidate before it can be finalized.

If no search criteria is entered, all transportation records that are marked as candidates are finalized and you cannot apply an entry number, import country, broker, or currency information.

The Finalize Transportation window contains the following sections.

- Transportation Selection
- Assign Values
- Finalize Transportation Toolbar

Figure 4-1   Finalize Transportation Window

Transportation Selection

In the Transportation Selection you can enter search criteria for the transportation record to be finalized. To clear the Transportation Selection use the Reset icon.

Table 4-1   Transportation Selection - Fields and Description

Fields	Description
Vessel	Enter, select or search for the vessel ID.
Voyage/Flight	Enter, select or search for the voyage/flight number.
Estimated Departure Date	Enter, select or search for the estimated departure date.

Assign Values

In the Assign Values section enter, select or search for the customs entry values that you want to apply to the transportation record.

Table 4-2   Assign Values - Fields an Description

Fields	Description
Entry No.	Enter the entry number assigned by the customs agency.
Broker	Enter, select or search for the ID of the broker.
Import Country	Enter, select or search for the ID of the import country.
Currency	Enter, select or search for the code for the currency of the import country.

Finalize Transportation Toolbar

The Toolbar displays the icons and buttons for actions that can be performed in the Finalize Transportation window. The Toolbar contains the following icons and buttons.

Table 4-3   Finalize Transportation Toolbar - Icons/Buttons and Description

Action Icons/Buttons	Description
Help icon	You can access the online help for a particular page by clicking the Help icon.
Delete icon	You can delete a transport by clicking the Delete icon.
Finalize	Click **Finalize** to change the status of the transportation to finalized.
Done	Click **Done** to close the Finalize Transportation window.

Finalize Transportation Records

To finalize transportation records, follow the steps below.

1. From the Tasks menu, select **Trade Management > Transportation > Finalize Transportation**. The Finalize Transportation window appears.

> **Note:**
>
> A transportation record must be marked as a Candidate before it can be finalized.

2. Enter the criteria for the transportation record to be finalized. Enter, select or search for the following values.

   • Vessel ID

   • Voyage/Flight number

   • Estimated departure date

> **Note:**
>
> If you leave all fields empty and click **Finalize**, all transportation records marked as candidates are finalized.

3. Enter the customs entry values that you want to apply to the record. Enter, select or search for following values.

   • Entry number assigned by customs agency

   • Import country ID

   • Broker ID

   • Currency Code

4. After you have entered all necessary information, choose one of the following options.

   • Select **Finalize**. The transportation records that match the criteria are copied to the Customs Entry module. The status of the transportation records are automatically changed to Finalized.

   • Select **Done** to close the Finalize Transportation window.