CargoWise Education

ediEnterprise
One platform that delivers

Order Manager

Learn how to register an order as a customer service representative.

Key Features
- ediEnterprise mandatory fields are in **RED**
- Hint boxes with user tips

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1. Create Order

Operations > Order Manager > Orders > New

- On the **Order tab**, enter / select:
  - **Ordered By** *(importer)*
  - Supplier *(shipper)*
  - Order Details including:
    - **Order No**: the system will generate a 'P' reference if left blank
    - Confirm No and Date
    - Invoice No and Date
    - Order Status, manually set the status or switch to automatic update, also customizable
    - Follow Up Date will populate a calendar reminder
    - Goods Desc
    - Enter the Currency if available from the commercial invoice
    - Service Level
    - INCO Term: prepaid or collect for billing
    - Transport and Container Mode
    - Country of Origin
- Select the **Save** button and write down the *Order number*

Hint

Auto Default Order Number:
The order number can be defaulted against the importers organization, **F3** on the *organization* ***> Consignee tab > Order Manager Settings > Auto Default Order***

2. Enter Order Lines

From ***Order Manager record > Order Lines tab***
The Order Lines tab enables you to enter in multiple products for the one order

- On the **Order Lines tab**, select the next available blank line:
  - Enter Part No.
  - Description
  - Inner and Outer Packs
  - QTY Ordered, Invoice and Received
  - QTY Remaining will populate what is still outstanding
  - Select **New** along gridline will populate a new order line
    - Line Status
    - Deliveries: allowing multiple delivery addresses along the gridline
    - Show Containers
    - **Save** and **Close** the order line

Hint

Buyer / Supplier Relationships:
Create relationships between buyers and suppliers; this will:
- Make it easier to locate organization records
- Default information on the shipment

3. Planning Tab

From ***Order Manager record > Planning tab***

- On the **Planning tab**, enter / select:
  - Origin Cut Off date
  - Carrier
  - Vessel, Voyage, ETD and ETA dates
  - Sending and Receiving Agents
  - Packs, Volume and Weight

4. Tracking Dates

From ***Order Manager record > Tracking Dates tab***

- Certain fields will populate the est and act dates
  - Description
  - Estimated vs Actual dates
- Select the ***Workflow and Tracking tab > Milestones tab*** to add additional Tracking dates

5. Shipment Tab

From ***Order Manager record > Shipment tab***

- Shipment No populates once attached to a shipment
- Declaration Ref populates if creating an import declaration
- Consols will populate along the gridline once attached to the order

6. Send Routing Order

From ***Order Manager record***

- Use the Documents menu to generate documents, such as:
  - *Import > Order Advice*
  - *Import > Order Notification*
  - *Import > Order Status*
  - *Import > Amendment To Booking*

Hint

System Generated Documents:
Use the Documents menu to generate documents. These documents can be stored under the eDocs tab and a log is stored under the Workflow & Tracking tab > Events tab.

7. Create Shipment / Declaration

From ***Order Manager record > Actions menu***

- On the **Order tab**, select *Actions Menu*:
  - Create Consol/Shipment/Declaration
  - Create Declaration
  - Create Shipment Pre Advice

8. Split / Create New / Do Nothing

From ***Order Manager record***

- The QTY Received is different to Quantity will populate the difference in the QTY Remaining column to produce the prompt upon saving:
  - Spilt Order
  - Create New Order
  - Do Nothing

9. Create a Shipment Pre-Advice

Operations > Order Manager > Shipment Pre Advice > New

- On the **Details tab**, enter / select:
  - Master and House Bill numbers
  - **Buyer**, **Load** and **Discharge Ports**
  - Carrier, Sending and Receiving Agents
  - Attach the shipment and/ or declaration
- In the Orders gridline:
  - Attach / create new orders
  - Select Product Delivery Wizard
- Actions menu:
  - Create Declaration
  - Create Consol/Shipment/Declaration:
    - Single House Bill
    - House Bill per Buyer/Supplier
    - House Bill per Order

10. Bulk Update

Operations > Order Manager > Orders > Bulk Update

- On the **Order Tab,** enter / select:
  - **Trans. Mode**
  - Status
  - Select the Orders to Update
  - Tracking Dates to Update
  - Vessel Information to Update
- Select Update

11. Customization

Admin > Reference Files > Organization

- Edit the Importers organization or the Org Proxy *(Admin > System > Company)*
- Select: ***Custom tab > Customization tab***
  - Order Status List
  - Order Line Status List
  - Along Customize Lables gridline enter:
    - Position, Mandatory, Field Name, Caption, Status bar or Fly-over Text
- **Save** and **Close** Organization

12. Status Reports

Operations > Order Manager > Reports

- Client – Order Status Summary
- Client – Order Lines
- Agent Order Status Summary Followup Report

Hint

Order attached to a Shipment
Once an Order has been attached to a shipment you no longer update the order, you must update the shipment which will update the Order

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