Report

The report module allows users to build customized reports and create an email delivery schedule to ensure each individual user and their larger teams stay up to date for seamless collaboration.
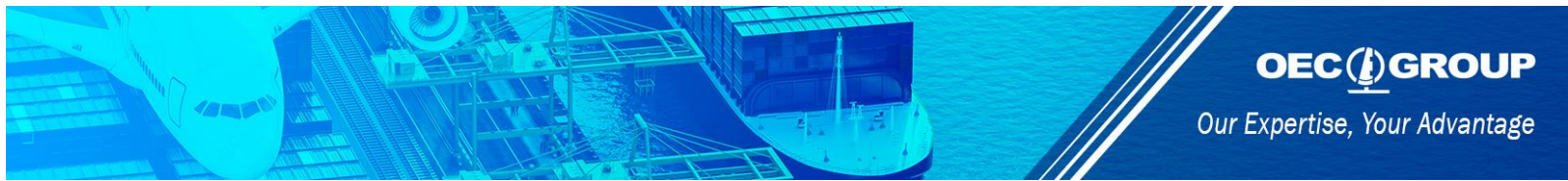
1. To access the report module, log into the customer portal.

2. Click Report from the left side menu.

How to create a customized report:

1. Click on the Create Report button in the upper right corner of the screen. A new window will appear for users to select their desired report type.

2. Select a report type and click the Continue button. You will be brought to the report preview page.

Raw Data Report > Create Report

Shipment by Container No. ⓘ

Save

Date Range : 07/29/2023 - 10/27/2023 ⌄

Current Status	Current Status Date	Container No.	Container Size	HBL No.	MBL No.	Port of Loading	Port of Discharge
Gate in to terminal	06/27/2023	JXLU7821712	40HQ	OERT142702M00211	ZIMUBOM6408288	Nhava Sheva (Jawaharlal N...	Savannah, Georgia, US
Vessel Departure	06/28/2023	ZCSU6728734	40HQ	OERT210702M00912	ZIMUHKG83430542	Nansha Pt, Guangdong, CN	New York, New York, US
Vessel arrival to transs...	06/28/2023	TEMU7253475	40HQ	OERT173702M00464	ZIMURQL6197013	Mundra, Gujarat, IN	Savannah, Georgia, US
Vessel arrival to transs...	06/28/2023	TLLU5313853	40HQ	OERT173702M00445	ZIMURQL6196392	Mundra, Gujarat, IN	Savannah, Georgia, US
Vessel Departure	06/25/2023	TLLU5723518	40HQ	OERT109702M00977	ONEYBKKDC6049900	Laem Chabang, TH	Savannah, Georgia, US
Vessel Departure	06/28/2023	CMAU7899675	40HQ	OERT210702M00829	CMDUUSH0285436	Hong Kong, HK	New York, New York, US
Vessel Departure	06/28/2023	NYKU9731160	20ST	OERT109702M00984	ONEYBKKDC6684700	Laem Chabang, TH	Savannah, Georgia, US
Gate In to Outbound Te...	06/29/2023	TCLU8920580	40ST	OERT101702M01787	ONEYTPED42080900	Kaohsiung, TW	New York, New York, US
Gate In to Outbound Te...	06/29/2023	TCLU8920580	40ST	OERT101702M01788	ONEYTPED42080900	Kaohsiung, TW	New York, New York, US

3. Users have multiple options to customize columns by clicking on the Customize Columns button in the upper right-hand corner.

Raw Data Report > Create Report

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4. A new window will appear after the user clicks on the Customize Columns button ⊞ . In this window, users may add or remove columns by selecting the data categories they'd like to see. After all desired columns are selected, click on the Apply button, and your report will be updated accordingly.

Customize Columns ✕

Select Fields

Current Status ✕   Current Status Date ✕   Container No. ✕   Container Size ✕

HBL No. ✕   MBL No. ✕   Port of Loading ✕   Port of Discharge ✕

Last CY/CFS Location ✕   ETD ✕   ETA-Port of Discharge ✕

ETA-Last CY/CFS Location ✕   Carrier ✕   Vessel/Voyage ✕

Choose Column

⌃ **Container Information**

▬ Select all

☑ Current Status   ☑ Current Status Date   ☑ Container No.

☐ Seal No.   ☑ Container Size   ☐ Gross Weight

☐ Volume   ☐ PKG   ☐ Last Free Day

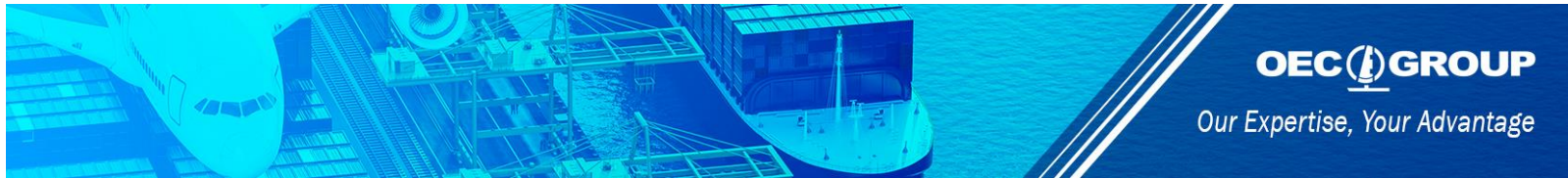⌃ **General Information**

▬ Select all

☑ HBL No.   ☑ MBL No.   ☐ PO No.

☐ IT No.   ☐ Booking No.

⌃ **Intended Transport Plan**

Cancel   **Apply**

5. After the report has been generated, users can download the report by clicking the Export ⬇ button.

   Reports can be exported as either .xlsx or .csv files.

6. To save the report, simply click the Save button.

How to schedule email delivery

1. Users can schedule email delivery for a report by clicking on the Schedule Email Delivery button ![icon]. This will display the Email Delivery window.

Raw Data Report > Create Report

Shipment by Container No. ⓘ

Save

Date Range : 07/29/2023 - 10/27/2023 ⌄

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2. After filling out the required fields, users can schedule the report by clicking the Schedule button. Users can also select Cancel to leave the page without saving any changes.

Email delivery ✕

Report template title *   22/50

Booking by Booking No.

Email subject *

To *

Add additional recipients

CC

Add additional recipients

Start time *   **Send at** *

10/24/2023 📅   Select ⌄

All reports can be sent up to four times per day.

Time Zone

(UTC-05) Eastern Time (US and Canada) ⌄

Frequency *

Daily ⌄   Every   1   day(s)

Document type *

.xlsx ⌄

Max 10,000 records

☐ Send blank report if there is no shipment/booking during the requested date range.

Cancel   **Schedule**

3. Users can edit the report delivery schedule by clicking the Actions button and returning to the email delivery page. If the report has already been scheduled, then click the Edit button to make changes, or click the Arrow button to inactivate or delete the delivery.

4. Once selecting Inactive, a screen will appear to successfully confirm the Inactive selection. When clicking on Delete, a warning window will appear to confirm whether to proceed or to cancel the operation.

5. Once users successfully inactivate a report, the report will be displayed as "Inactive" in Schedule Detail.

Raw Data Report ⓘ

My Report   Public Report

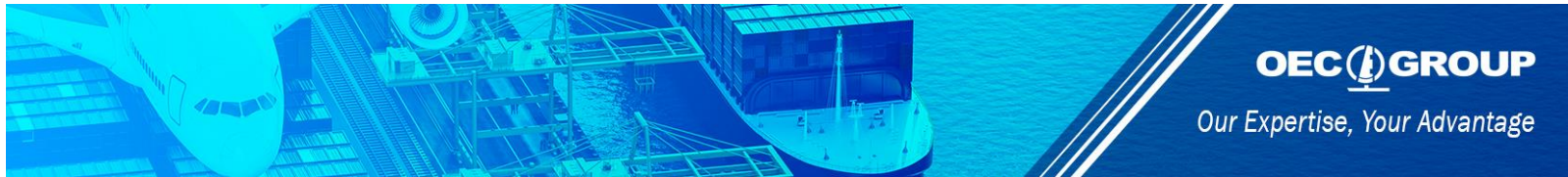Build customized reports and create an email delivery schedule to ensure you and your team stay up to date for seamless collaboration.

Status	Report Type	Title	Schedule	Last Updated Date	Actions
Shared	Booking by PO No.	Booking by PO No.	Inactive Sends everyday at 10:00 effective 10/24/2023	10/25/2023	⋯
Private	Booking by PO No.	Booking by PO No -CY test weekly	Active Sends every week on Tuesday at 10:00 effective 10/18/20...	10/25/2023	⋯
Shared	Booking by PO No.	Booking by PO No -CY Test Monthly	Inactive Sends every month on day 24 at 10:00 effective 09/20/2023	10/27/2023	⋯

How to share a report

1. Users can share customized reports with anyone within the same organization by clicking the Share button under Actions column. To access the reports that have shared with you from the accounts within the same organization, click on the Public Report tab.

Raw Data Report ⓘ

My Report   Public Report

Build customized reports and create an email delivery schedule to ensure you and your team stay up to date for seamless collaboration.

Status	Report Type	Title	Schedule	Last Updated Date	Actions
Private	Shipment by HBL No.	shipment report	Active Sends every week on Tuesday, Wednesday, Thursday and ...	10/27/2023	⋯
Private	Booking by Booking No.	booking Report	Inactive Sends everyday at 02:00, 05:00 and 15:00 effective 10/12/...	10/24/2023	⋯ Duplicate
Private	Shipment by Container No.	cntr last 180 days tues	Inactive Sends every week on Thursday at 12:00 effective 10/10/2...	10/24/2023	Share
Shared	Booking by Booking No.	Booking report	Inactive Sends every month on day 12 at 12:00 effective 10/10/2023	10/24/2023	Schedule email delivery
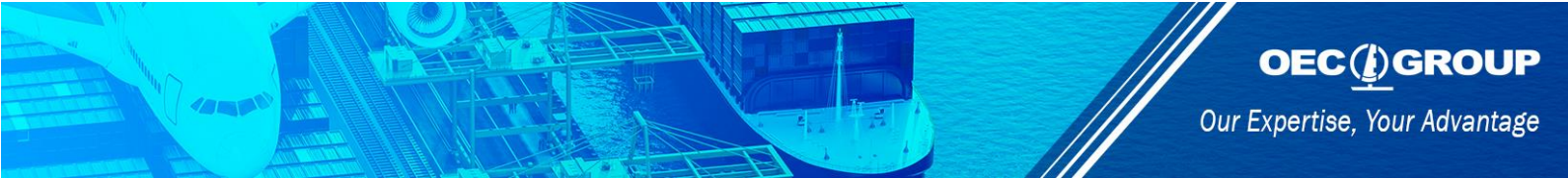
Raw Data Report ⓘ

My Report   **Public Report**

Share the customized reports you build to anyone within your company for more effective interdepartmental teamwork.

[Search...]   [Report Type ⌄]   [Last Updated Date ⌄]

[+ Create report]

Report Type ⇅	Title ⇅	Owner ⇅	Last Updated Date ⇅	Actions
Shipment by HBL No.	Jackies Test report1	sss ssss	10/24/2023	...
Booking by Booking No.	Testing	Cnee NYC	10/12/2023	...

← [1] / 1 →   [10 / Page ⌄]   2 Results