

## 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.

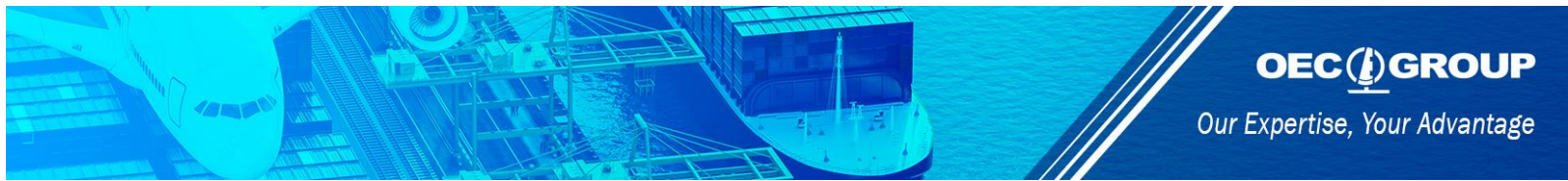
1. To access the report module, log into the customer portal.

The screenshot shows the OEC GROUP customer portal dashboard. The top navigation bar includes the OEC GROUP logo and a search bar. The left sidebar menu contains links to Dashboard, Booking, Shipment, Document, and Report. The main content area displays a welcome message for Hi Claire Yang, followed by several widgets: 'Recently Viewed' with announcements, 'Task' with a 'Wait for Confirmation' status, 'Shipment' with a 'Departed in the past 30 days' status, and 'Booking' with a 'Created in the past 30 days' status. The 'Report' link in the sidebar is highlighted with a red box.

2. Click Report from the left side menu.

The screenshot shows the 'Raw Data Report' page in the OEC GROUP customer portal. The page features a sidebar menu with links to Dashboard, Booking, Shipment, Document, and Report. The main content area displays a table of reports with columns for Status, Report Type, Title, Schedule, Last Updated Date, and Actions. The 'Report' link in the sidebar menu is highlighted with a red box.

Status	Report Type	Title	Schedule	Last Updated Date	Actions
Private	Booking by PO No.	Booking by PO No -CY Test Monthly	Active Sends every month on day 24 at 10:00 effective 09/20/2023	10/24/2023	...
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 Booking No.	13		10/04/2023	...
Private	Booking by Booking No.	AAAAAAA		10/05/2023	...
Shared	Booking by Booking No.	test	Active Sends every month on day 2 at 01:00 effective 09/26/2023	10/06/2023	...
Private	Shipment by Container No.	16		10/05/2023	...



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.

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.

Search...

Status

Report Type

Last Updated Date

Status	Report Type	Title	Schedule	Last Updated Date	Actions
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+ Create report

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

Report Type

Booking

☐

Booking by Booking No.  
Use your booking number to review your booking details and the status of your booking.

☐

Booking by PO No.  
Use your PO number to review your booking details and the status of your booking.

Shipment

☒

Shipment by HBL No.  
Use your HBL number to view shipment volume, status, and other essential details.

☐

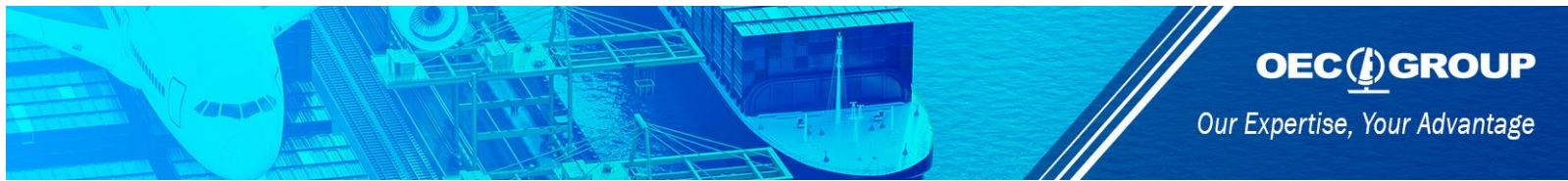
Shipment by Container No.  
Use your container number to view shipment volume, status, and other essential details.

☐

Shipment by PO No.  
Use your PO number to track the progress and status of each order and check the total quantity against the purchase order number.

Cancel

Continue



Raw Data Report > Create Report

Shipment by Container No. ⓘ

Save

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

📄 ⬇️ 🗑️

Current Status <small>⬆️ ⬆️</small>	Current Status Date <small>⬆️ ⬆️</small>	Container No. <small>⬆️ ⬆️</small>	Container Size <small>⬆️ ⬆️</small>	HLB No. <small>⬆️ ⬆️</small>	MBL No. <small>⬆️ ⬆️</small>	Port of Loading <small>⬆️ ⬆️</small>	Port of Discharge <small>⬆️ ⬆️</small>
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


Shipment by Container No. ⓘ

Save

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

📄 ⬇️ 🗑️

Current Status <small>⬆️ ⬆️</small>	Current Status Date <small>⬆️ ⬆️</small>	Container No. <small>⬆️ ⬆️</small>	Container Size <small>⬆️ ⬆️</small>	HLB No. <small>⬆️ ⬆️</small>	MBL No. <small>⬆️ ⬆️</small>	Port of Loading <small>⬆️ ⬆️</small>	Port of Discharge <small>⬆️ ⬆️</small>
Gate in to terminal	06/27/2023	JXLU7821712	40HQ	OERT142702M00211	ZIMUBOM6408288	Nhava Sheva (Jawaharlal N...	Savannah, Georgia, US
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Gate In to Outbound Te...	06/29/2023	TCLU8920580	40ST	OERT101702M01788	ONEYTPED42080900	Kaohsiung, TW	New York, New York, US

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.

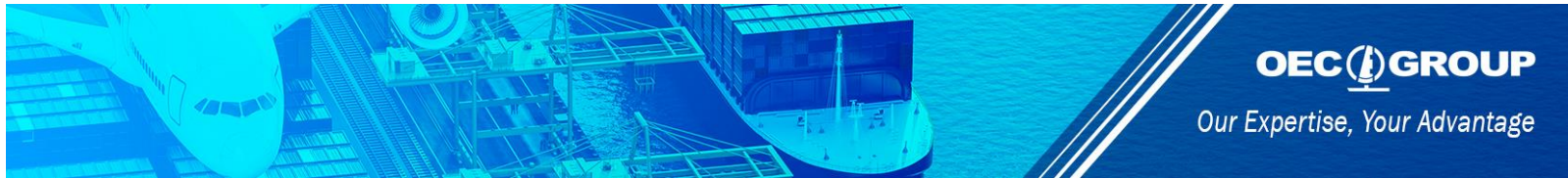
☐ IT No.

☐ 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.

Raw Data Report > Create Report

Shipment by Container No. ⓘ

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



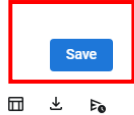
Current Status	Current Status Date	Container No.	Container Size	HBL No.	MBL No.	Port of Loading	Port of Discharge
Gate in to terminal	06/27/2023	JXLU7821712	40HQ	OERT142702M00211	ZIMUBOM6408288	Nhava Sheva (Jawaharlal N...	Savannah, Georgia, US
Vessel Departure	06/28/2023	ZCSU6728734	40HQ	OERT210702M00912	ZIMUHG83430542	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
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Vessel Departure	06/28/2023	CMAU7899675	40HQ	OERT210702M00829	CMDUUSH0285436	Hong Kong, HK	New York, New York, US
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Gate In to Outbound Te...	06/29/2023	TCLU8920580	40ST	OERT101702M01788	ONEYTPED42080900	Kaohsiung, TW	New York, New York, US

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

Raw Data Report > Create Report

Shipment by Container No. ⓘ

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
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Vessel arrival to transs...	06/28/2023	TEMU7253475	40HQ	OERT173702M00464	ZIMURQL6197013	Mundra, Gujarat, IN	Savannah, Georgia, US
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Gate In to Outbound Te...	06/29/2023	TCLU8920580	40ST	OERT101702M01788	ONEYTPED42080900	Kaohsiung, TW	New York, New York, US



## How to schedule email delivery

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

Raw Data Report > Create Report

Shipment by Container No. ②

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

Save

📅 ⬇️ ⚙️

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
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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

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\*

10/24/2023



Send at\*

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\*

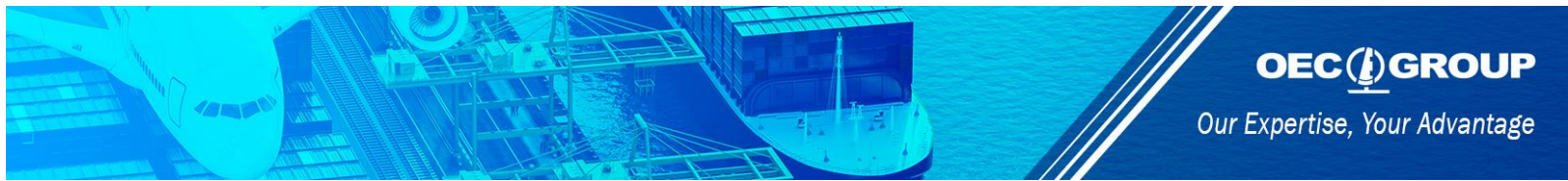
.xlsx

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.

Email delivery

×

Receiver

Report template title  
Booking by PO No.

Email subject  
Booking by PO number Report-CY test

To  
cy.jfk@oecgroup.com

🔔 Sends everyday at 10:00 effective 10/24/2023

Document type  
.xlsx

Inactivate

Delete

Edit

⬆

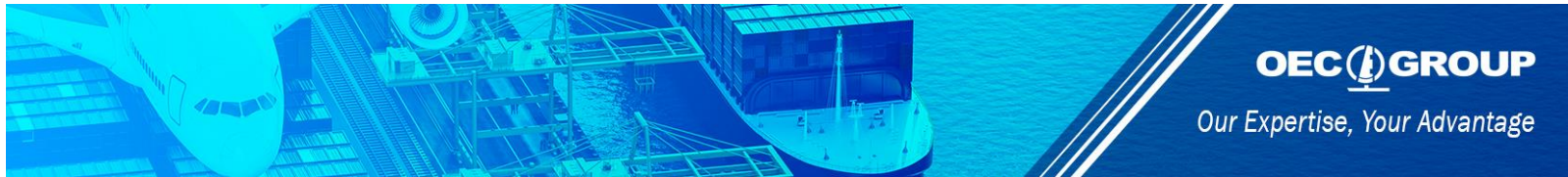
4. Once selecting Inactive, a screen will appear to successfully confirm the Inactive selection. When clicking on Delete, a warning window will appear to confirm whether to proceed or to cancel the operation.

⚠ Delete

Confirm to proceed?

Cancel

Delete



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

Raw Data Report ⓘ + Create report

My ReportPublic Report

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

Search...

Status

Report Type

Last Updated Date

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 ⓘ + Create report

My ReportPublic Report

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

Search...

Status

Report Type

Last Updated Date

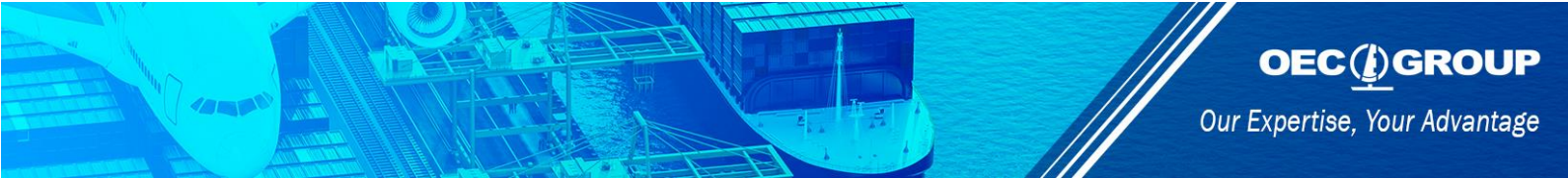
Status	Report Type	Title	Schedule	Last Updated Date	Actions
Private	Shipment by HBL No.	shipment report	Active Sends every week on Tuesday, Wednesday, Thursday and ...	10/27/2023	...
Private	Booking by Booking No.	booking Report	Inactive Sends everyday at 02:00, 05:00 and 15:00 effective 10/12/...	10/24/2023	...
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	...
Shared	Booking by Booking No.	Booking report	Inactive Sends every month on day 12 at 12:00 effective 10/10/2023	10/24/2023	...

Duplicate

Share

Schedule email delivery





Raw Data Report ⓘ

+ Create 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 ▾

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	...