



QAD Adaptive Applications

User Guide
QAD Precision
Import Management

70-3491-19.0
QAD Precision 19
January 2022

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Change Summary

The following table summarizes significant differences between this document and previous versions.

Date/Version	Description	Reference
January 2022/QAD Precision 19	Initial version	--

Chapter 1

Getting Started

This section describes how to get started using the QAD Precision Import Management solution.

Logging In

Describes the fields on the Login page.

Home Page

Describes the elements of the default home page.



Logging In

If your administrator assigned a default profile to you, some of the fields listed below may not be available. You may only see the *User Id* and *Password* fields. The appearance of the login page also varies depending on the design that the administrator applies.

After you complete the necessary fields, click *Login*.

Table 1.1

Caption

Field	Function
User Id	Your user identification (ID).
Password	A unique password. It is case sensitive and can be alphanumeric.
Client	Defaults from the user ID profile. This client is the transaction client in the database where shipping transactions are stored.
Locale	Defaults from the user ID profile. The locale determines where printer/device documents are sent.
Packing Location	Defaults from the user ID profile. A packing location is the logical area from where users ship their shipments.
Language	The default is English. You can select another available language.
Use default values for this user	When this field is selected, only the User Id and Password fields are displayed. The defaults configured for your account by the administrator are applied to the other fields.

Fig. 1.1

Login Page

The screenshot shows the QAD login interface. At the top is the QAD logo. Below it, the following fields are visible:

- User Id:** A text input field.
- Password:** A text input field.
- Client:** A dropdown menu showing "TGL: PRECISION - Global Shipping".
- Locale:** A dropdown menu showing "QPDF".
- Packing Location:** A dropdown menu showing "A9901: Chicago".
- Language:** A dropdown menu showing "English".
- ☐ Use default values for this user.
- [Login](#) button.

At the bottom of the page, the text "PRECISION Web UI 7.2.0-SNAPSHOT [20200226-0039]" is displayed.

Important The login page displays a message regarding cookies. Ensure that you read this message before proceeding.

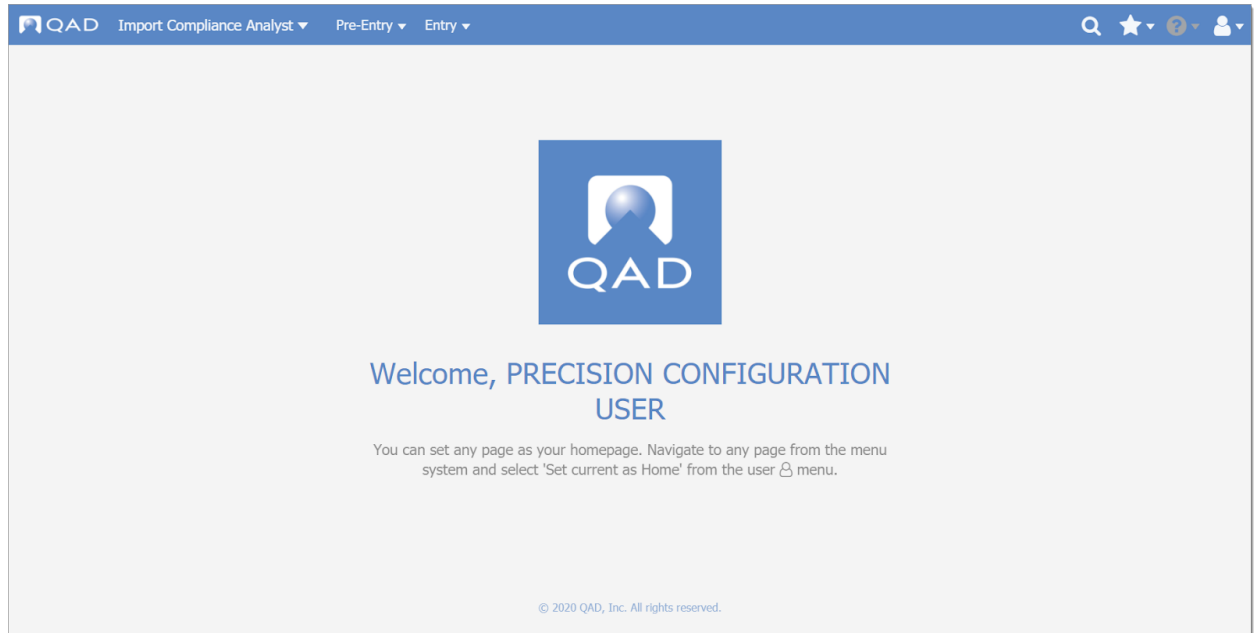


Home Page

After you log in, a welcome page provides you with new or important information. Your administrator may configure this page to display a company logo and specific colors, instead of the QAD Precision logo and colors.

Fig. 1.2

Welcome Page



If configured by your administrator, a different page may display as your homepage after logging in.

The role-based menu bar at the top of the screen provides a navigation experience tailored to each job title. The following three job titles are associated with the Imports solution:

- Import Compliance Analyst
- Import Compliance Supervisor
- Import System Admin (only option enabled to modify configuration settings)

Note For information on user creation, see *Base Administration Guide*.



Chapter 2

Product Master

The Imports Product Master provides support for multiple importing countries per product, as well as a single classification for customs blocks, with individual country override.

Overview

Explains how to access the Product Master.

Creating Products

Describes how to create products manually and by uploading them in batches.

Maintaining Products

Describes how to update, copy, and delete records.

Classification Worksheet

Describes how headings, subheadings, General Rules of Interpretation (GRIs), applicable Customs Rulings, and/or other relevant data is captured using the Classification Worksheet to support a classification determination.

Product Details Portal

Describes how the Product Details portal is used to capture product details regarding customs admissibility requirements.

Suppliers Portal

Describes how the Suppliers portal is used to maintain supplier details and records for a product.



Overview

The *Product Master* is used to create and manage products.

To access the *Product Master* page, click the *Pre-Entry* drop-down in the top horizontal menu. Then select *Product Master*. Alternatively, access the FLOW option.

Fig. 2.1

Product Master in Main Menu

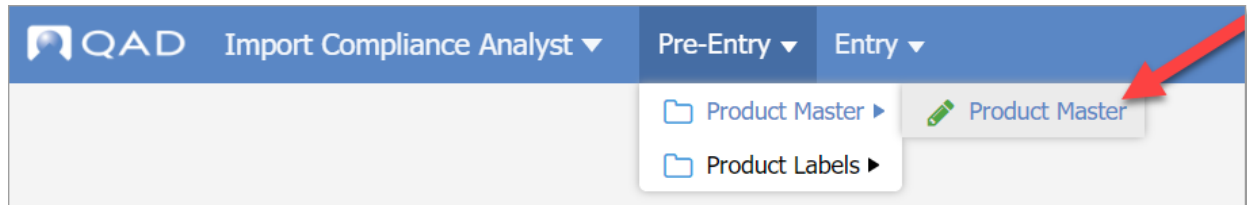


Fig. 2.2

Product Master Page

Product Master						
Product Code:		Search By:		Search	Clear	
Product Details	Classification Worksheet	Suppliers				
Product Code	Commercial Description	Commercial Extended Description	Commodity Code	Classification Status	Supplier Part Number	Display Import C
15601400	dec					
2933998220	2933998220					
501978931	NEXTAL SCREEN BLOCK 96X1.5 ML					
A1000000	BOOTS - SIZE 7 - BLACK					
A1000001	BOOTS - SIZE 8 - BLACK					
A1000002	BOOTS - SIZE 9 - BLACK					
A1000004	BOOTS - SIZE 7 - GOLD					
A1000005	BOOTS - SIZE 8 - GOLD					
A1000006	BOOTS - SIZE 9 - GOLD					
A1000008	BOOTS - SIZE 7 - RED					
A1000009	BOOTS - SIZE 8 - RED					
A1000010	BOOTS - SIZE 9 - RED					
A199-A	Injection Mold					
A2000001	Buttery Cheese	Our buttery cheese is the finest of t...				
A2000002	Chicken Powder					
A2000003	Chocolate Grosana					
A2000004	Moqueca	One of the finest ingredients from th...				
A2000005	Mega-Milk Super Size(nft)					
A201004	VIS LAITON M6x1x18mm	HexH M/C P01				
A3000001	Gauze(nft)					

Note Products in the Product Master can be added and fully classified through ERP messages.

Creating Products

You can create products manually or by uploading them in batches. Both methods are described in this section.

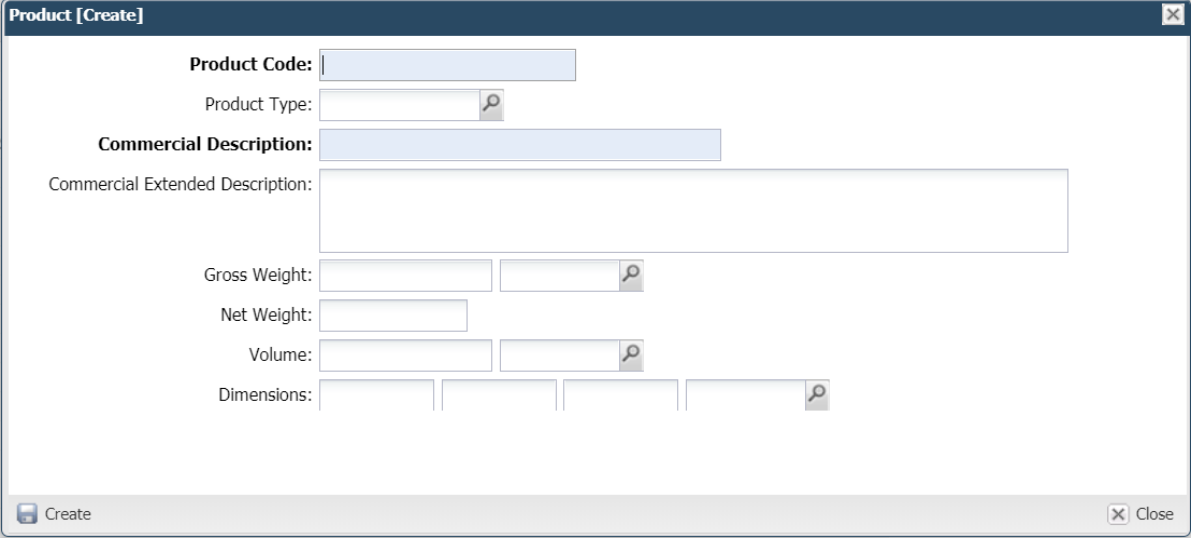
Manually Creating Products

To manually create a new product:

1. Click the *Create*  button on the toolbar at the bottom of the page. The *Product [Create]* displays.

Fig. 2.3

Product [Create]



2. Complete the mandatory fields that are indicated by a blue background. Include any other relevant details in the remaining fields.

Note The *Product Code* must be unique and not match an existing product.

3. Click *Create* to close the window and create the product.

Uploading Products

To upload products in batches using a CSV file:

1. Click the *Upload*  button on the toolbar. The *Upload Products* window displays.

Fig. 2.4

Upload Products Window

The screenshot shows a window titled "Upload Products". It contains three main input areas: "Batch Id:" with a text box, "Description:" with a larger text box, and "Upload File:" with a text box containing "Upload a file" and a "Browse" button. Below the "Upload File:" text box is a purple link "Download file template". At the bottom of the form is an "Upload" button with a folder icon. A "Close" button is in the bottom right corner of the window.

2. Complete the mandatory fields that are indicated by a blue background. Include other relevant details in the remaining fields.

Batch Id. Used as a reference for the labels created.

Description. Used to support the Batch Id.

Upload File. Click Browse to locate the file on your computer.

Download file template. This link downloads a template that you can follow when creating a CSV for batch upload.

Note The values for Country of Origin, Commodity Code and Importing Countries must match existing inputs on the system configurations.

Fig. 2.5

Upload Products Window

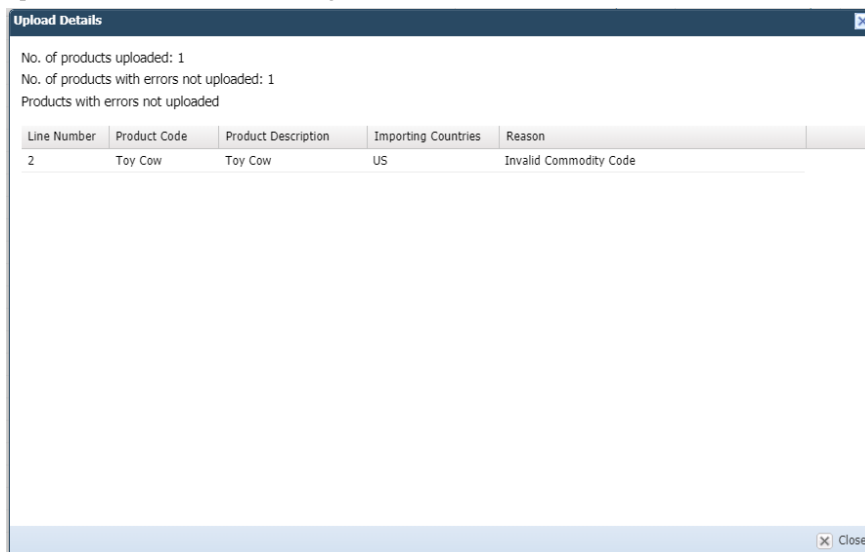
This screenshot shows the same "Upload Products" window as Fig. 2.4, but with some fields filled in. The "Batch Id:" text box now contains "TOY PRODUCTS". The "Description:" text box is empty. The "Upload File:" text box now contains "Toys.csv". The "Browse" button is still present. The "Download file template" link and the "Upload" button are also visible. The "Close" button is in the bottom right corner.

3. Click *Upload*.

The *Upload Details* window displays. This window indicates if an error occurred during the upload process and why.

Fig. 2.6

Upload Details Window Indicating an Error

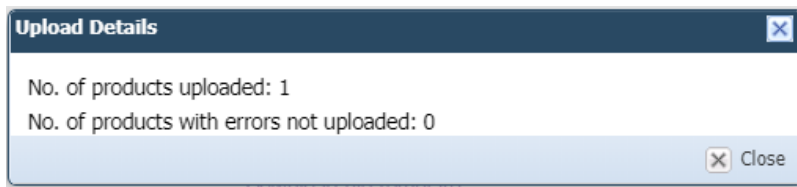


In the example shown above, a product could not be uploaded due to an invalid commodity code associated with the product on line number two of the file. All other products within the acceptable criteria were uploaded.

The example below shows an *Upload Details* window with no errors.

Fig. 2.7

Upload Details Window Without Errors



Note Upload details appear on the Classification Worksheet when it is opened.

Maintaining Products

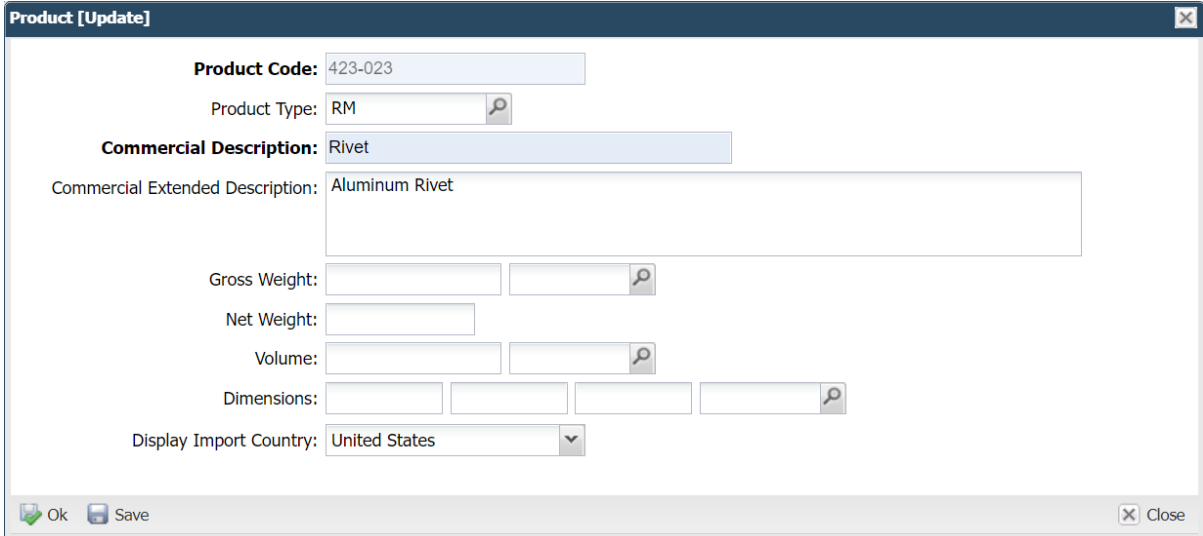
You can update, copy, and delete records, regardless of whether they were added manually or by batch upload.

To update a record, double-click it in the *Product Master* grid. Alternatively, select a record and click the *Update*  button on the toolbar. The *Product [Update]* window appears.

To duplicate a product, select a record in the grid and click the *Copy*  button on the toolbar. The *Product [Copy]* window displays, allowing you to make any necessary changes.

Fig. 2.8

Product [Copy] Window



Product [Update]

Product Code: 423-023

Product Type: RM

Commercial Description: Rivet

Commercial Extended Description: Aluminum Rivet

Gross Weight: [] []

Net Weight: []

Volume: [] []

Dimensions: [] [] [] []

Display Import Country: United States

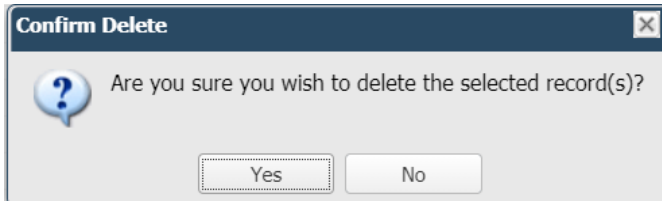
Ok Save Close

Note The *Display Import Country* field contains countries that are saved in the Classification Worksheet. If a country is selected in this field, it is also displayed in the Product Master. In the example above, the United States is selected. This means that the product details for the United States are shown. If the selected country is changed to Switzerland, then Switzerland's product details are shown.

To delete a product, select a record and click the *Delete*  button on the toolbar. Then click *Yes* in the *Confirm Delete* window.

Fig. 2.9

Confirm Delete Window



Confirm Delete

Are you sure you wish to delete the selected record(s)?

Yes No

Classification Worksheet

The Classification Worksheet is a tool that captures and records competing Heading/Subheadings, Section/Chapter Notes, General Rules of Interpretation (GRIs), applicable Customs Rulings, and/or other relevant data that is required to support a classification determination.

To open the *Classification Worksheet* window, select a product record in the *Product Master* grid. Then click the *Classification Worksheet* button below the search panel.

Fig. 2.10

Product Master Button

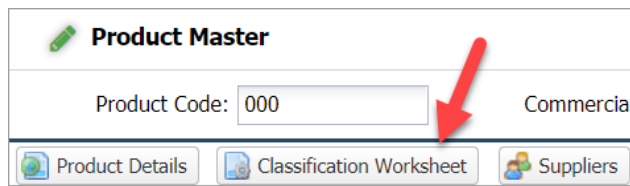
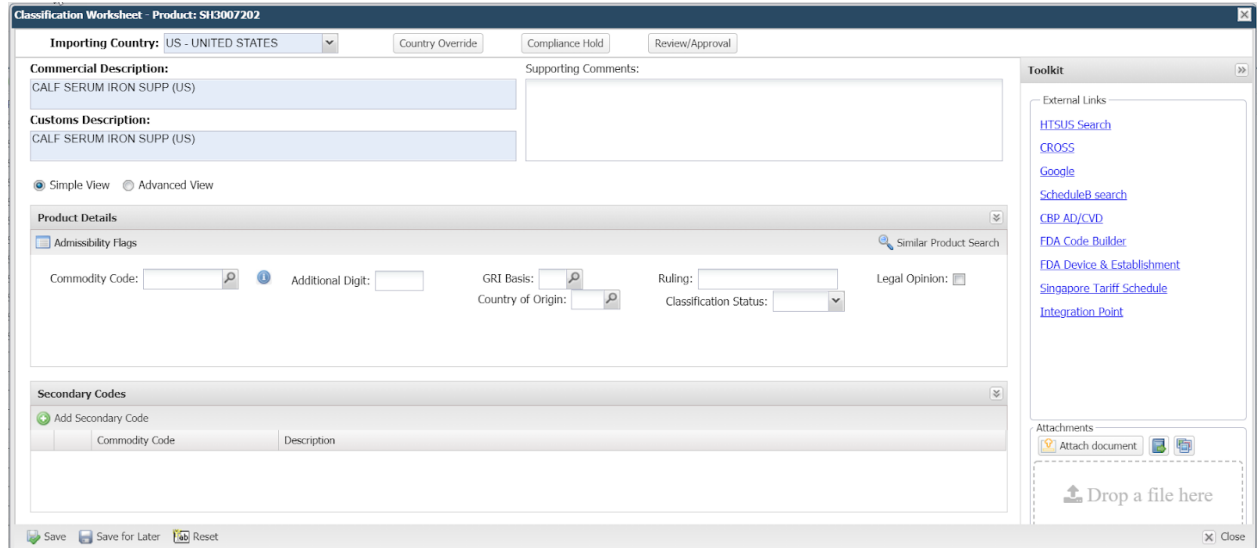


Fig. 2.11

Classification Worksheet Window



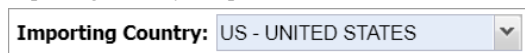
The various fields and buttons in this window are described below.

Importing Country

The classification details for the product are country-specific. You can maintain different classification data for different countries.

Fig. 2.12

Importing Country Drop-Down



Country Override

The *Country Override* feature—accessible by clicking the *Country Override* button—is used to distinguish a country from a group of countries that have the same classification.

Fig. 2.13

Country Override Button



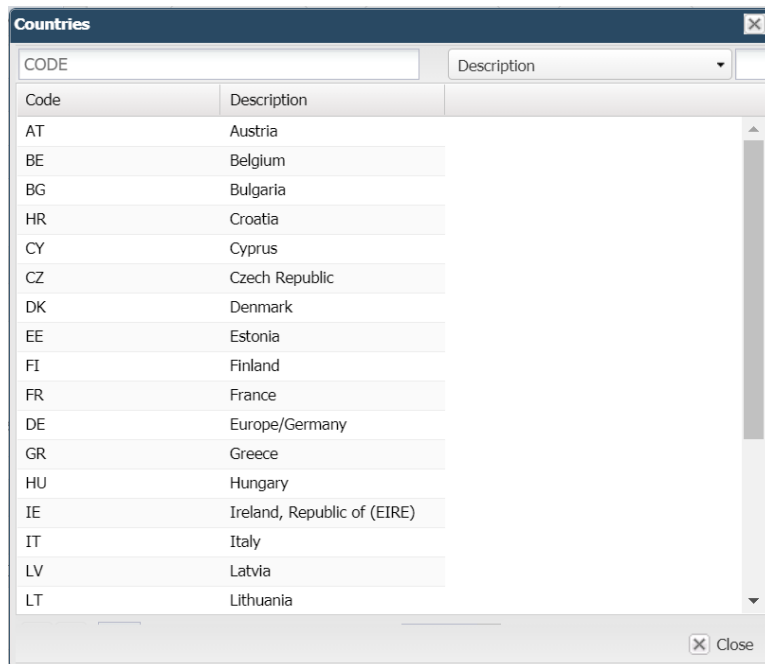
For example, you may want all products imported into the European Union (EU) countries to be classified the same way. However, if you want a specific country in the EU to be classified differently, you can use the *Country Override* feature to create an exception.

Note The countries that are associated with a particular group are configured by a system administrator.

To distinguish a country from a group, click the *Country Override* button. This is only accessible if the selected country in the *Importing Country* field is part of a group. The *Countries* window displays.

Fig. 2.14

Countries Window

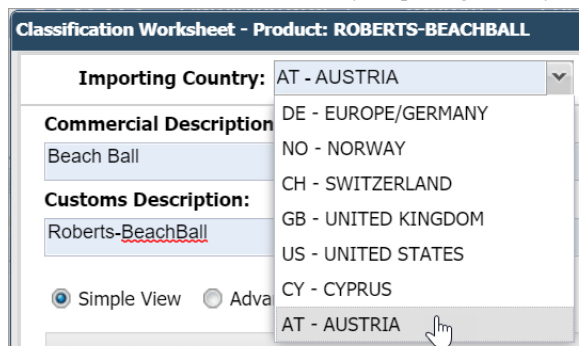


Select the country for which you want to make a separate classification. The *Classification Worksheet* window refreshes and the specified country is now the value in the *Importing Country* field. All fields are pulled from the original group.

In the example below, Austria was selected for a separate classification. Austria now appears in the *Importing Country* field and is distinguished from the rest of the EU. Austria also now appears on the *Product Details* and *Suppliers* page.

Fig. 2.15

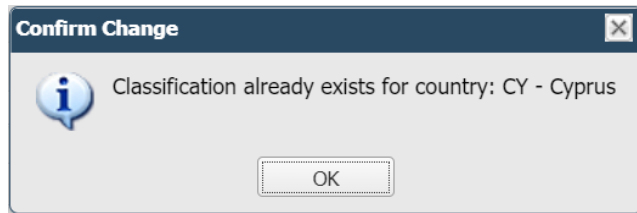
Austria Selected as Override Country, Importing Country Field



If you attempt to select a country that is already classified separately from its group, a pop-up window indicates that records already exist for this country.

Fig. 2.16

Importing Countries



Compliance Hold

A compliance hold can be assigned to any product in the Classification Worksheet. A compliance hold is country-specific.

Click the *Compliance Hold* button at the top of the window to access the Compliance Hold feature.

Fig. 2.17

Compliance Button



Fig. 2.18

Compliance Hold Window

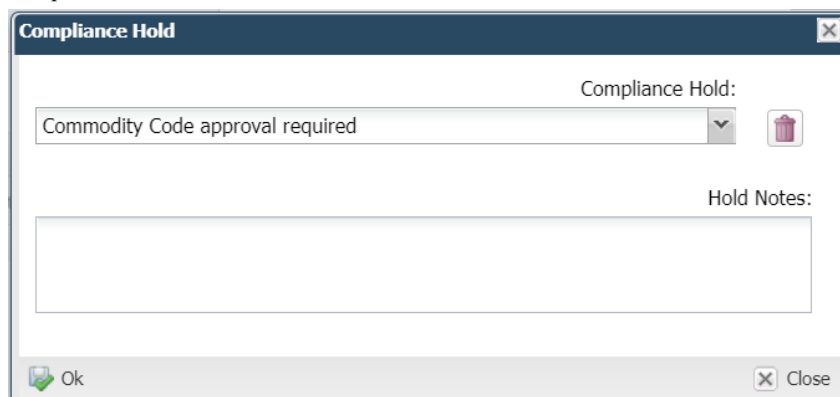
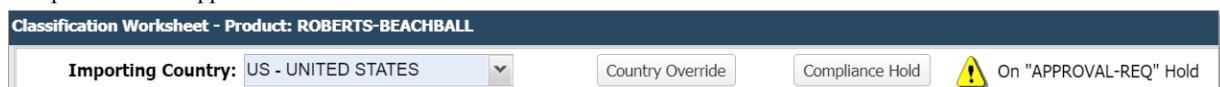


Fig. 2.19

Compliance Hold Applied



Removing Compliance Hold

To remove a compliance hold, click the *Compliance Hold* button and click the *Delete*  button beside the *Compliance Hold* field. Enter a reason for the deletion in the mandatory *Hold Notes* field. Then click *Ok* to save the changes and close the window.

Review/Approval

The Review/Approval feature is used to indicate that a product needs to be reviewed or approved. See the *Raising Labels* section for more information on the *Review/Approval Request* window.

Commercial Description

The *Commercial Description* field is used to describe the commercial characteristics of a product based on its purpose, or how it is sold.

Customs Description

Using the *Customs Description* field, you can insert a description of the goods, including any attribute or details that customs require in order to confirm that it is properly classified.

Supporting Comments

The *Supporting Comments* field is used to log internal notes about the product and alert other users to a specific topic or issue.

Simple View and Advanced View

The information displayed in the *Classification Worksheet* window varies depending on the selected view. You can choose between two different view options:

- Simple View
- Advanced View

Fig. 2.20

View Selection



Note By default, Simple View is enabled.

Simple View

Simple View is intended for products that do not require a lot of inputs. In Simple View, a product has one article associated with it; the product itself. For more information on articles, see the *Adding Articles* section.

The available features and fields in the *Product Details* panel are:

- Admissibility Flags
- Similar Product Search
- Commodity Code
- Additional Digit
- GRI Basis
- Ruling
- Legal Opinion



- Country of Origin
- Classification Status

Features such as the GRI Wizard and Competing Headings are not available in Simple View.

Fig. 2.21

Simple View, Classification Worksheet

Advanced View

In addition to the features provided in Simple View, Advanced View enables you to associate multiple articles with a product, add Competing Headings, and use the GRI Wizard. These are accessible in the *Product Details/Articles* panel.

Fig. 2.22

Advanced View, Classification Worksheet

Important Switching from Advanced View to Simple view can result in the loss of information. All article records and their respective details are removed, except for the first article. Additionally, the first article loses details that are not available in Simple View, such as Competing Heading information. You are asked to confirm these changes when you select the *Simple View* radio button.

Fig. 2.23

Confirm Change to Simple View Pop-up



Product Details Panel

Depending on the selected view, the fields and features described in this section can be found in the *Product Details* panel of the Classification Worksheet.

Admissibility Flags

The Admissibility Flags feature is available in the *Product Details/Articles* panel in both Simple and Advanced View.

Fig. 2.24

Admissibility Flags, Simple View

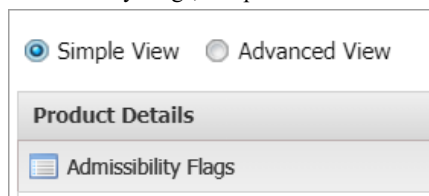
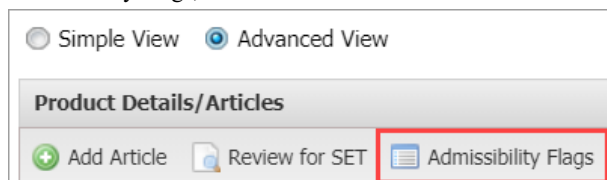


Fig. 2.25

Admissibility Flags, Advanced View



When a commodity code is added to your product or article, you can view the Admissibility Flags here. Click the *Admissibility Flags* button to access the *Admissibility Flags* window.

Note The *Admissibility Flags* window does not display if no flags are found.

Fig. 2.26
Admissibility Flags

Product / Article	Admissibility Flag	Commodity Description	Flag	Flag Description
ARTICLE1 HTSUS - 0102210010	AM2 - AMS Flag 2 - Data related to shell eggs is re	MALE DAIRY PUREBRED BREEDING	AM2	AMS Flag 2 - Data related to shell eggs is requi...
ARTICLE1 HTSUS - 0102210010	AM7 - AMS Flag 7 - AMS Data related to marketing	MALE DAIRY PUREBRED BREEDING	AM7	AMS Flag 7 - AMS Data related to marketing or...
ARTICLE1 HTSUS - 0102210010	FD3 - FD Flag 3 - FDA Prior Notice Data may be re	MALE DAIRY PUREBRED BREEDING	FD3	FD Flag 3 - FDA Prior Notice Data may be requ...
ARTICLE1 HTSUS - 0102210010	AQ99038501AR - Section 232 Aluminum Import Al	MALE DAIRY PUREBRED BREEDING	AQ99038501AR	
ARTICLE1 HTSUS - 0102210010	Country: Argentina 0% - 99038501 - Always Required Start Date: 2018/06/01			
ARTICLE1 HTSUS - 0102210010	TT99038815CN - Section 301 HTSUS China Import	MALE DAIRY PUREBRED BREEDING	TT99038815CN	
ARTICLE1 HTSUS - 0102210010	Country: China 15% - 99038815 - Always Required Start Date: 2019/09/01			
ARTICLE2 HTSUS - 2904993500	TT99038803CN - Section 301 HTSUS China Import	4,4'-DINITROSTILBENE-2,2'DISUL	TT99038803CN	
ARTICLE2 HTSUS - 2904993500	Country: China 10% - 99038803 - Always Required Start Date: 2018/09/24			
ARTICLE3 HTSUS - 6702903500	AM4 - AMS Flag 4 - AMS Data related to marketing	ARTIFICIAL FLOWERS,MAN-MD FIB	AM4	AMS Flag 4 - AMS Data related to marketing or...
ARTICLE3 HTSUS - 6702903500	AQ99038501AR - Section 232 Aluminum Import Al	ARTIFICIAL FLOWERS,MAN-MD FIB	AQ99038501AR	
ARTICLE3 HTSUS - 6702903500	Country: Argentina 0% - 99038501 - Always Required Start Date: 2018/06/01			
ARTICLE4 HTSUS - 9506993500	TT99038815CN - Section 301 HTSUS China Import	SKEET TARGETS	TT99038815CN	
ARTICLE4 HTSUS - 9506993500	Country: China 15% - 99038815 - Always Required Start Date: 2019/09/01			

Although you cannot interact with the flags in the Classification Worksheet, it is possible in the Product Details portal. See the *Product Details Portal* section for more information.

Similar Product Search

The Similar Product Search feature is available in the *Product Details* panel in both Simple and Advanced View. It enables you to speed up the product details data entry process by locating a similar product in the database and copying its details to the new product.

Fig. 2.27
Similar Product Search, Simple View

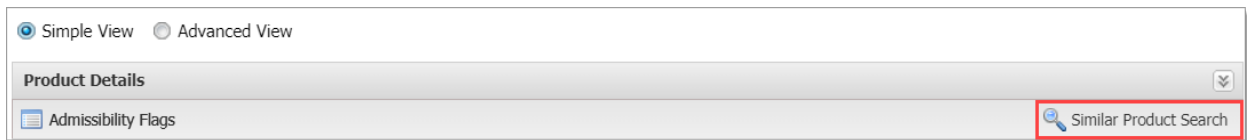
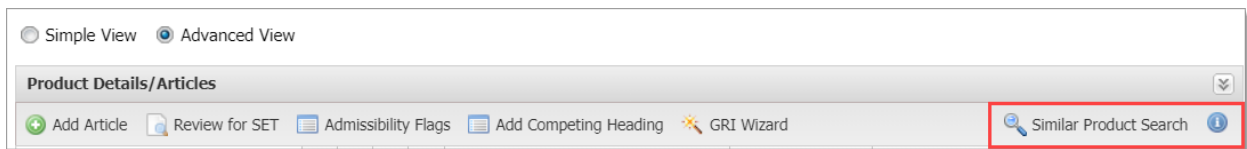


Fig. 2.28
Similar Product Search, Advanced View



To search for a similar product:

1. Click the *Similar Product Search* button. The *Similar Product Search* window displays.

Fig. 2.29

Similar Product Search Window

The screenshot shows the 'Similar Product Search' window. The search panel at the top includes fields for Product, Customs Description, Classified By, Importing Country (set to 'US - UNITED STATES'), Product Description, Classified Within (set to 'All'), Product Type, and Description Extended. There are 'Search' and 'Refresh' buttons. Below the search panel is a table with the following columns: Product, Product Description, Product Description - Extended, Importing Country, Commodity Code, and Customs Description. The table is currently empty. At the bottom, there is a pagination bar showing '0' results, 'Per Page 25', and 'No Data'. A 'Close' button is in the bottom right corner.

2. Use the fields in the search panel to find specific products. After you complete one or all of the fields, click *Search*. The grid below the search panel displays the results.

Note Only fully classified products appear in the results grid.

Fig. 2.30

Search Results, Similar Product Search Window

The screenshot shows the 'Similar Product Search' window with search results. The search panel is the same as in Fig. 2.29, but the 'Product Type' is now set to 'FG'. The results table below contains the following data:

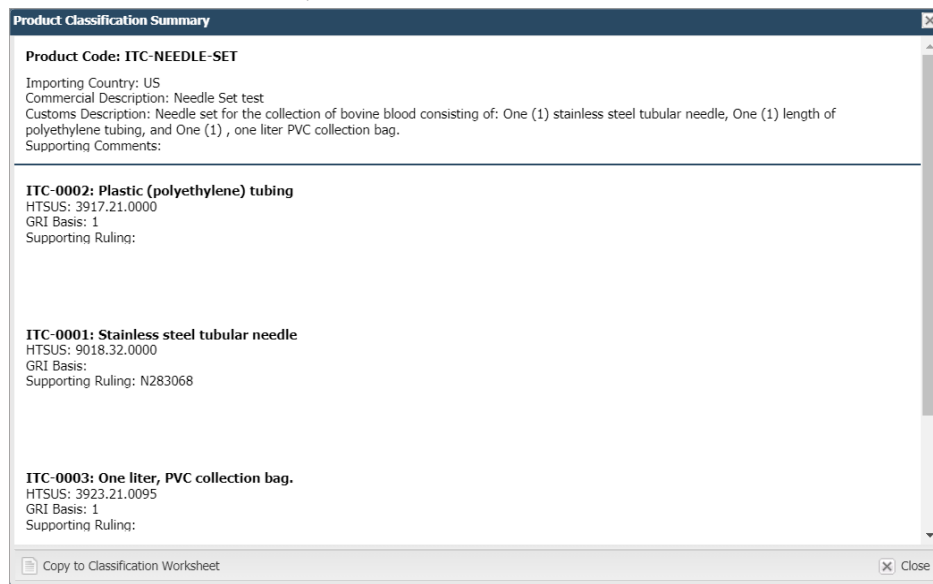
Product	Product Description	Product Description - Extended	Importing Country	Commodity Code	Customs Description	Cl
ITC-JP-5000	FBX_Holiday Pack_US		US	9031.80.8085	Holiday gift set containing ...	
ITC-NEEDLE-SET	Needle Set test	Needle set for the collection of bovine blood ...	US	9018.32.0000	Needle set for the collectio...	
ITC-TOOTBRUSH-ELECTRIC	Electric Toothbrush		US	8509.80.5045	Electric Toothbrush	
ITC-TSHIRT-NY	T-Shirt - New York	Men's blue T-Shirt, 50% cotton, 50% polyest...	US	6109.90.1050	Men's t-shirt; 50% cotton ...	
JW001	John Test Prod		US	3801.10.1000	x	
LBE_Z777	CommercialDesc		US	0101210010	testeste5555	
LBE_Z888	CommercialDesc		US	0101.21.0010	testeste5555	
LBE_Z999	CommercialDesc		US	0101.21.0010	testeste5555	
PROD_COA	DESC	DESC	US	0102.29.2011	DESC	
PROD_COA_SINGLE	DESC	DESC	US	0101.90.4000	DESC	

The pagination bar at the bottom shows '1' result, 'Per Page 25', and a 'Close' button.

3. To view the details of a product in the grid, select it and click the *Show Product Details* button. An overview of the product details displays in the *Product Details Summary* pop-up window.

Fig. 2.31

Product Classification Summary Window



Click the *Copy to Classification Worksheet*  button at the bottom of this window to copy the similar product's details to the new product. The copied details include the values for the following fields:

- Secondary Codes
- Description fields
- Commodity Code
- GRI basis
- Ruling,
- Legal Opinion
- COO

Alternatively, select a record in the results grid and click the *Apply Product Classification Information*  button to copy the details of an existing product. The *Similar Product Search* window closes and the values in the *Commercial Description*, *Customs Description*, *Commodity Code*, *Additional Digit*, *GRI Basis*, *Ruling*, *Descriptions*, *Legal Opinion*, *Country of Origin*, and *Secondary Codes* fields are now populated. All related articles are also copied over.

Note If you added any articles before copying the details of a similar product, they are removed and replaced with the copied information.

Note In cases where the selected product is from a different importing country, you must update the commodity codes if they are part of a separate commodity group.

Adding Articles

In Advanced View, The *Add Article* feature allows you to add items or components that comprise a product; for example, a gift set typically contains multiple items. These articles can receive individual classification.



Note This feature is only available with Advanced View enabled. In Simple View, you must complete the inputs to add an article.

Fig. 2.32

Multiple Articles, Product Details/Articles Panel

Product Details/Articles						
Add Article Review for SET Admissibility Flags Add Competing Heading GRI Wizard Similar Product Search						
Article Number ▲			Commodity Code	GRI Basis	Ruling	Item Description
008	☆	📄	0102.21.0030	2A		Item 1
010	☆	📄	0102.29.2012	2A		Item 2

Adding an Article

To add an article:

1. Click the *Add Article* button at the top of the *Product Details/Articles* panel. The *Article [Create]* window displays.

Fig. 2.33

Article [Create] Window

Article [Create]

Article Number:

Description:

Commodity Code:

GRI Basis:

Ruling:

Legal Opinion:

☐

Note:

Save

Close

2. Complete the mandatory *Article Number* and *Description* fields. Enter any other relevant article information in the remaining fields.

Note The selected Importing Country determines the commodity codes available in the *Commodity Code* lookup field. Some commodity codes are part of a group and are shared across several countries; for example, countries in the EU.

3. Click *Save*.

You can update an article by clicking the *Update*  button on an article record.

Note The *Article Number* field in the *Article [Update]* window is read-only and cannot be updated.

To delete an article, click the *Delete*  button on an article record.

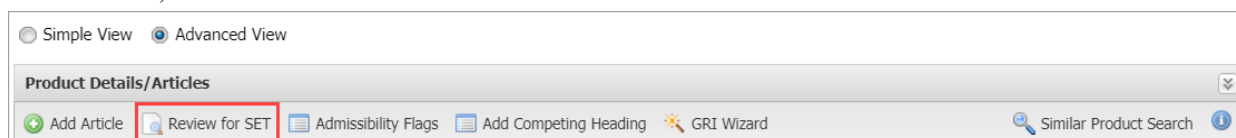
Review for SET

The *Review for SET* feature is available in Advanced View. It is a guide that determines whether your product can qualify as a set. A set contains at least two different articles that are classifiable in different headings and are packaged together in a manner that is suitable for retail. These articles are also put together to fulfil a particular need or to satisfy a specific activity.

Note The result provided by the guide is advisory and not definitive.

Fig. 2.34

Review for SET, Advanced View



To begin the review process:

1. Click the *Review for SET* button. The *Review for SET* window displays.

Fig. 2.35

Review for SET

Review for SET

To qualify as a Set, the product should meet all 3 criteria.

1. Contains at least 2 different articles classifiable in different headings, and ☐ Yes ☐ No

2. are packaged together in a manner suitable for retail sale, and ☐ Yes ☐ No

3. are put up together to fulfill a particular need or satisfy a specific activity ☐ Yes ☐ No

2. Answer questions 1-3 using the radio buttons.
3. A result is displayed below the questions based on the answers provided.

Fig. 2.36

Review for SET Result

Review for SET

To qualify as a Set, the product should meet all 3 criteria.

1. Contains at least 2 different articles classifiable in different headings, and ☒ Yes ☐ No

2. are packaged together in a manner suitable for retail sale, and ☒ Yes ☐ No

3. are put up together to fulfill a particular need or satisfy a specific activity ☒ Yes ☐ No

Given the provided answers, your product may qualify as a set.

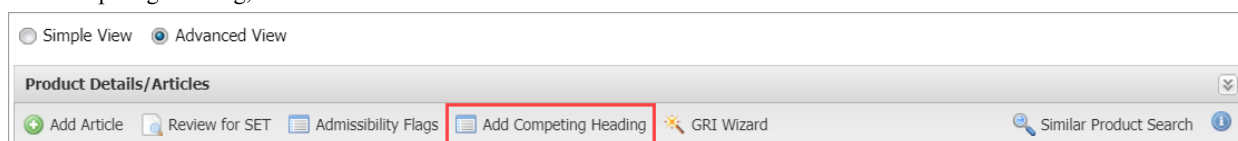
Add Competing Heading

The *Add Competing Heading* feature is available in Advanced View. It can be used in cases where you are unsure of the commodity code/classification of an article or want to add notes.



Fig. 2.37

Add Competing Heading, Advanced View



Competing headings act as sub-records to articles. If an article that contains a competing heading is deleted, the competing heading is also removed.

To add a competing heading:

1. Select an article and click the *Add Competing Heading* button. The *Competing Heading [Create]* window displays.

Fig. 2.38

Competing Heading [Create]

2. After completing the fields, click *Submit*.

You can add multiple competing headings for the same product by repeating this process.

To update a competing heading, select it in the *Product Details* panel and click the *Update* button.

To delete it, click the *Delete* button on the selected record.

To delete all competing heading records associated with an article, click the *Delete All* button.

Applicable Competing Heading/Commodity Code

You can specify that a competing heading is applicable through the use of a green check mark, as shown in the image below.

Fig. 2.39

Applicable Competing Heading

Article Number ▲					Commodi
010	☆	📄	📄	✖	0101.90.4
42342	☆	📄	📄	✖	
Competing headings				🗑️	
ExampleCompHeading1	?	📄	📄	✖	✓
ExampleCompHeading2	?	📄	📄	✖	

Click inside the column to the right of the *Delete* button column on the relevant record. In the example above, the 'ExampleCompHeading1' competing heading record is selected.

Note It is not possible to remove the green checkmark after it has been added. You can only move it to another competing heading record.

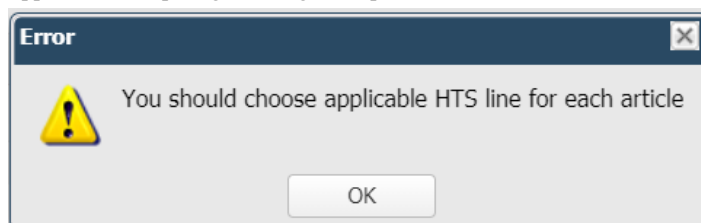
When an applicable competing heading has been identified by you, the Commodity Code, GRI Basis, Ruling and Item Description values for the article automatically change to match it.

Note When you save the Classification Worksheet, the competing heading records without the green checkmark are automatically deleted.

The green checkmark is mandatory if any competing heading is added. If no record is marked as applicable, an error displays.

Fig. 2.40

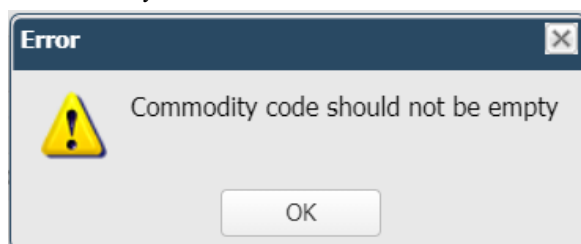
Applicable Competing Heading Not Specified Error



Similarly, if you do not add a commodity code to the article(s), an error displays.

Fig. 2.41

No Commodity Code Error

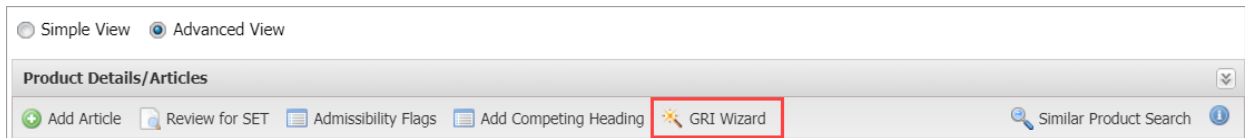


GRI Wizard

The *GRI Wizard* feature is available in Advanced View.

Fig. 2.42

GRI Wizard, Advanced View



The purpose of the GRI Wizard is to facilitate product classification by presenting a set of questions in a worksheet. It is intended to serve as a basic job aide but does not provide a definitive determination.

The product classification process in the GRI Wizard can differ depending on the scenario. These are discussed below.

To begin the product classification process using the GRI Wizard:

1. Click the *GRI Wizard* button. The *GRI Wizard* window displays.

Fig. 2.43

GRI Wizard Questions

 A screenshot of the 'GRI Wizard' window. The window has a title bar 'GRI Wizard'. Inside, there are three questions with radio button options. The first question is 'Is the imported product comprised of single or multiple articles?' with 'Single' selected. The second question is 'The article is referenced in a Heading specifically by name (i.e., "eo nomine"), and is a completely finished good, even if unassembled.' with 'No' selected. The third question is 'The article is referenced in a Heading specifically by name (i.e., "eo nomine"), is incomplete or unfinished, but has the "essential character" of the complete or finished article.' with 'Yes' selected. At the bottom, there is an 'Apply GRI' button, an information icon, and a 'Close Wizard' button.

2. Answer the questions that are presented until a result is provided in the *GRI Determination and Rule* panel to the right of the window.

Fig. 2.44

GRI Determination

GRI Wizard

Is the imported product comprised of ☒ Single ☐ Multiple single or multiple articles?

The article is referenced in a Heading specifically by name (i.e., "eo nomine"), and is a completely finished good, even if unassembled. ☐ Yes ☒ No

The article is referenced in a Heading specifically by name (i.e., "eo nomine"), is incomplete or unfinished, but has the "essential character" of the complete or finished article. ☒ Yes ☐ No

GRI Determination and Rule

GRI 1, GRI 2(A)

"Any reference in a heading to an article shall be taken to include a reference to that article incomplete or unfinished, provided that, as entered, the incomplete or unfinished article has the essential character of the complete or finished article. It shall also include a reference to that article complete or finished (or failing to be classified as complete or finished by virtue of this rule), entered unassembled or disassembled.

Apply GRI ⓘ Close Wizard

3. To accept the suggested GRI basis, click the *Apply GRI* button. The *Apply GRI* window displays.

Fig. 2.45

Apply GRI Window

Apply GRI

Apply GRI 6 to :

☒ Product

☐ Article

Save Close

4. To apply the GRI basis to the product, select the *Product* option. To apply it to a specific article, select the *Article* option. If you choose the *Article* option, you are then prompted to specify the article in the drop-down field that appears. You can repeat this process to apply the GRI basis to multiple articles.

Fig. 2.46

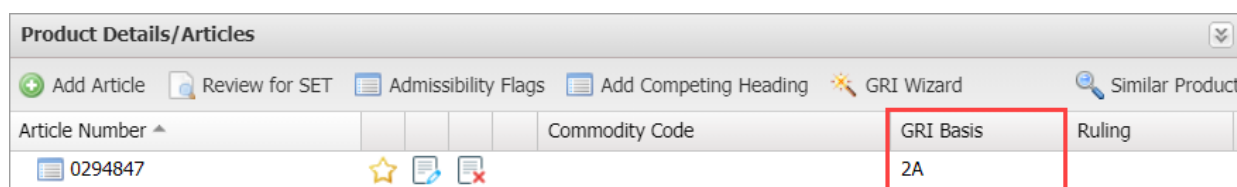
Specify Article, Apply GRI Window



5. Click *Save*. The *GRI Basis* column of the *Product Details* panel now displays the applied classification.

Fig. 2.47

Article GRI Basis



Note It is not possible to save if the determination reached is N/A.

Essential Character Within a Set

If an article of a product or set is the primary component, you can indicate this using the Essential Character feature.

This is only applicable when the GRI Wizard is for a product containing multiple articles with a 3B basis assigned on a product level, rather than an article basis. Doing so indicates what article is the most important for customs purposes.

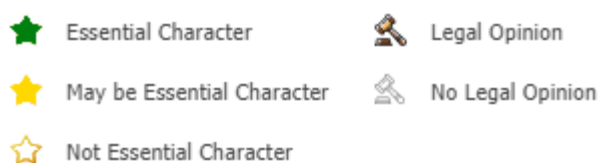
This is completed through the use of a green star icon. It functions similar to the green checkmark discussed in the Applicable Competing Heading/Commodity Code section.

The below image shows a legend.

Fig. 2.48

Legend

Legend



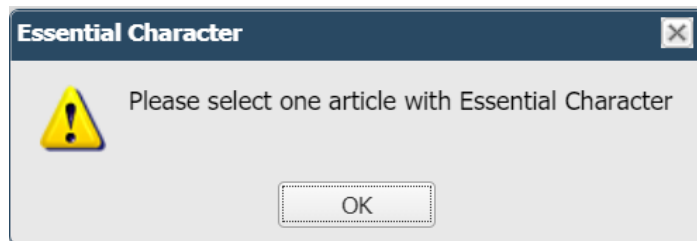
This legend also shows the icon to indicate that the *Legal Opinion* field is selected.

Click the star  icon to indicate that an article makes up the Essential Character.

If you indicate that an article makes up an Essential Character, but do not apply a green star, an error is presented.

Fig. 2.49

Essential Character Error



This error also displays if you give more than one element a green star.

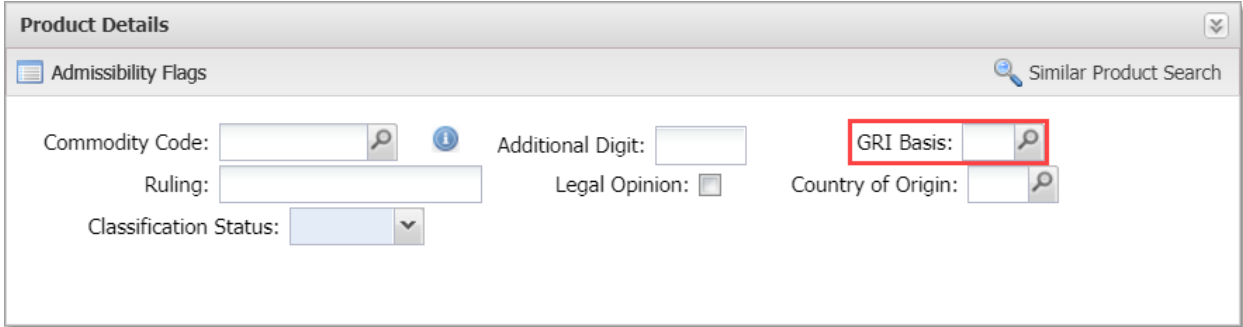
Articles marked May be Essential Character automatically default to Not an Essential Character after you click Save (if another article has the green star).

GRI Wizard for a Simple View Product

You can also apply a GRI basis to a product in Simple View. This is possible using the *GRI Basis* field in the *Product Details* panel.

Fig. 2.50

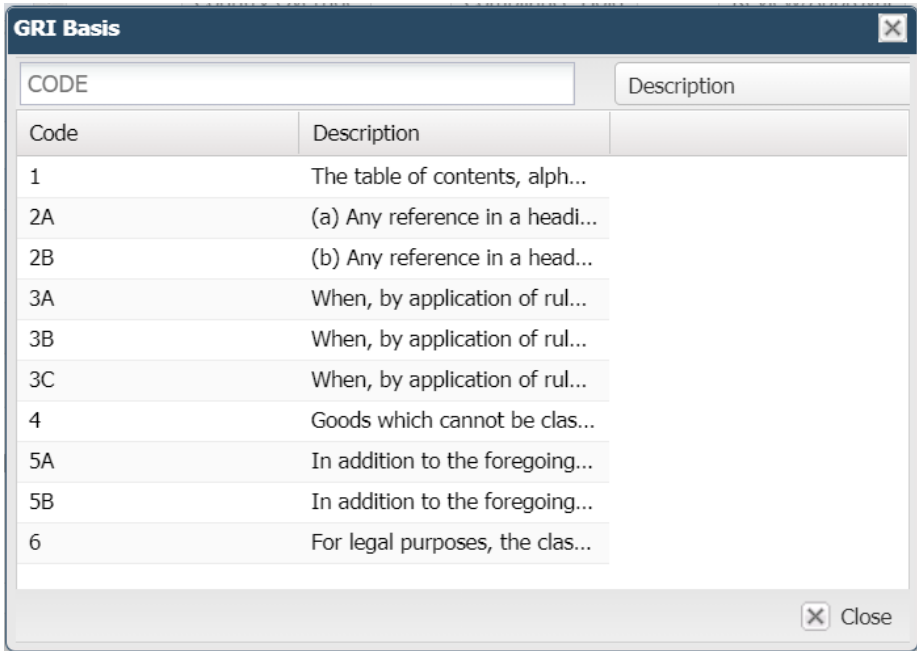
GRI Basis Field, Simple View



Click the *GRI Basis* field to open the *GRI Basis* lookup window. Select a code in this window to populate the field.

Fig. 2.51

GRI Basis Lookup Window



The GRI Basis Lookup Window displays a table with two columns: CODE and Description. The table lists various codes and their corresponding descriptions. A 'Close' button is located at the bottom right of the window.

CODE	Description
1	The table of contents, alph...
2A	(a) Any reference in a headi...
2B	(b) Any reference in a head...
3A	When, by application of rul...
3B	When, by application of rul...
3C	When, by application of rul...
4	Goods which cannot be clas...
5A	In addition to the foregoing...
5B	In addition to the foregoing...
6	For legal purposes, the clas...

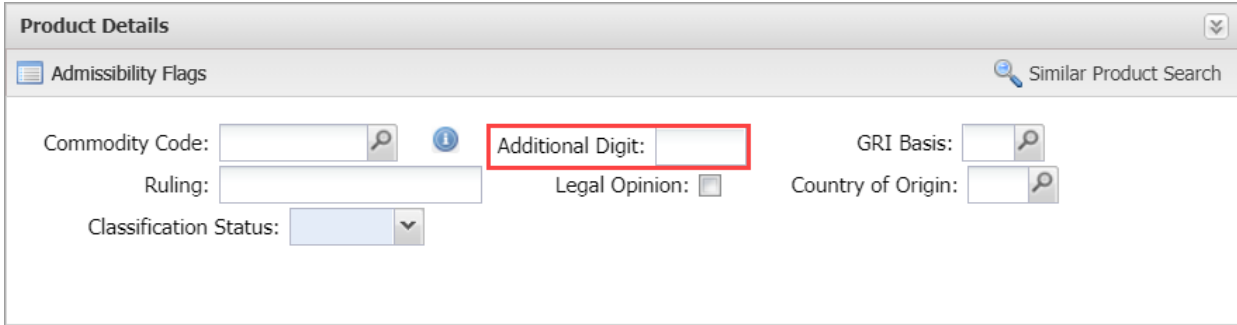
Additional Digit

The Additional Digit feature is available in both Simple and Advanced View. It enables you to add a single additional digit to an existing commodity code.

Note In Advanced View, the value is applied on a product level.

Fig. 2.52

Additional Digit Field, Simple View



The Product Details window shows various fields for product information. The 'Additional Digit' field is highlighted with a red box. Other fields include Commodity Code, Ruling, Classification Status, Legal Opinion, GRI Basis, and Country of Origin. A 'Similar Product Search' button is also visible.

Fig. 2.53

Additional Digit Field, Advanced View

Classification Worksheet - Product: 0294847

Importing Country: US - UNITED STATES Country Override Compliance Hold

Commercial Description:

Supporting Comments:

Customs Description:

Commodity Code:

GRI Basis: 

Ruling: 

Additional Digit:

Country of Origin: 

Classification Status:

☐ Simple View ☒ Advanced View

Ruling

The Ruling feature is available in both Simple View and Advanced View. It enables you to input reference codes from an applicable body; for example, the Customs Rulings Online Search System (CROSS). A ruling can be applied to an article or on product level. These codes validate and confirm a commodity code for a product.

Fig. 2.54

Ruling Field, Simple View

Simple View ☒ Advanced View ☐

Product Details

Admissibility Flags Similar Product Search

Commodity Code: Additional Digit: GRI Basis:

Ruling: Legal Opinion: ☐ Country of Origin:

Classification Status: **TCCHK**

Fig. 2.55

Ruling Column, Advanced View

Classification Worksheet - Product: 0294847

Importing Country: **US - UNITED STATES**

Commercial Description:

Supporting Comments:

Customs Description:

Commodity Code:

GRI Basis:

Ruling:

Additional Digit:

Country of Origin:

Classification Status: **TCCHK**

☐ Simple View ☒ Advanced View

The *Ruling* column in Advanced View is indicated in the image below. In this example, the ruling applies at article level.

Fig. 2.56

Ruling Column, Advanced View

Product Details/Articles						
Add Article Review for SET Admissibility Flags Add Competing Heading GRI Wizard						
Article Number			Commodity Code	GRI Basis	Ruling	Item Description
ARTICLE1	★	📄	1602.50.6000		NY F87825	Article1
ARTICLE2	★	📄	2904.99.3500			Article2
ARTICLE3	★	📄	6702.90.3500			Article3
ARTICLE4	★	📄	9506.99.3500			Article4

Note To view the justification for the commodity code, you can read more on the CROSS website by inputting the ruling code.

If the article with the ruling is of Essential Character, it is displayed as shown in the image below. This is also the case for Commodity Code and GRI Basis. Otherwise, the article with the largest first digit in the Commodity Code appears alongside the applicable GRI Basis

Fig. 2.57

Product Details

Commodity Code: 1602.50.6000	GRI Basis: 3B
Country of Origin:	Ruling: NY F87825

Country of Origin

The Country of Origin feature is available in both Simple View and Advanced View. A country of origin can be applied on a product level.

Fig. 2.58

Country of Origin, Simple View

☒ Simple View
 ☐ Advanced View

Product Details

[Admissibility Flags](#)
[Similar Product Search](#)

Commodity Code:
 Additional Digit:
 GRI Basis:

Ruling:
 Legal Opinion: ☐
Country of Origin:

Classification Status:

Fig. 2.59

Country of Origin, Advanced View

Classification Worksheet - Product: 0294847

Importing Country: US - UNITED STATES Country Override Compliance Hold

Commercial Description:

Supporting Comments:

Customs Description:

Commodity Code:

GRI Basis:

Ruling:

Additional Digit:

Country of Origin:

Classification Status: TCCHK ▼

☐ Simple View ☒ Advanced View

The *Country of Origin* field is automatically populated on the Suppliers portal for articles.

Note If you change the Country of Origin in the Suppliers portal, the change is not reflected in the Classification Worksheet.

Secondary Codes Panel

The *Secondary Codes* panel allows you to maintain additional commodity codes for a product; for example, temporary tariff codes.

Fig. 2.60

Secondary Codes Panel

Secondary Codes ▼

Add Secondary Code

	Commodity Code	Description

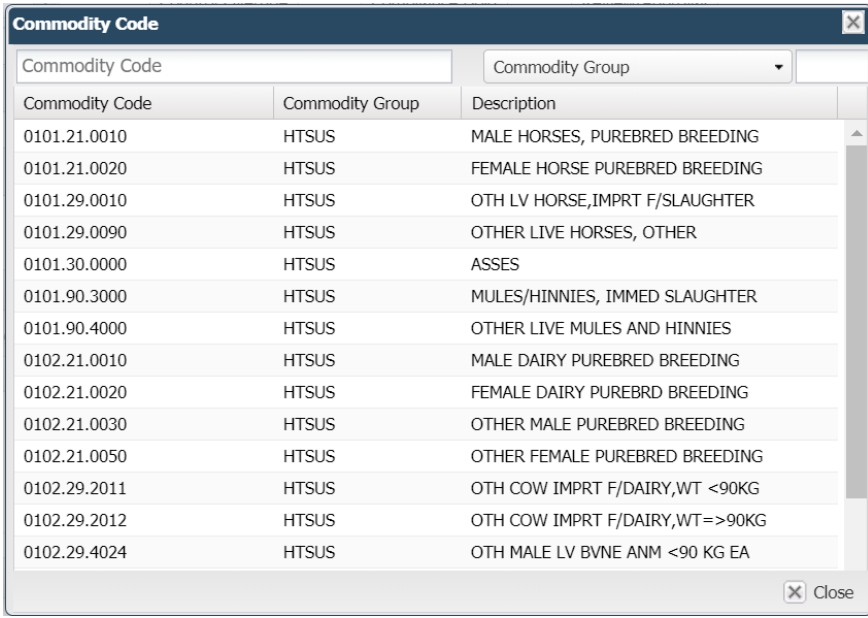
To add an additional secondary code:

1. Click the *Add Secondary Code* button. The *Commodity Code* lookup window displays.



Fig. 2.61

Commodity Code Lookup Window



The image shows a window titled "Commodity Code" with a search bar and a dropdown menu for "Commodity Group". Below is a table with three columns: "Commodity Code", "Commodity Group", and "Description". The table lists various commodity codes and their descriptions, all under the "HTSUS" group. A "Close" button is at the bottom right.

Commodity Code	Commodity Group	Description
0101.21.0010	HTSUS	MALE HORSES, PUREBRED BREEDING
0101.21.0020	HTSUS	FEMALE HORSE PUREBRED BREEDING
0101.29.0010	HTSUS	OTH LV HORSE, IMPRT F/SLAUGHTER
0101.29.0090	HTSUS	OTHER LIVE HORSES, OTHER
0101.30.0000	HTSUS	ASSES
0101.90.3000	HTSUS	MULES/HINNIES, IMMEDIATE SLAUGHTER
0101.90.4000	HTSUS	OTHER LIVE MULES AND HINNIES
0102.21.0010	HTSUS	MALE DAIRY PUREBRED BREEDING
0102.21.0020	HTSUS	FEMALE DAIRY PUREBRED BREEDING
0102.21.0030	HTSUS	OTHER MALE PUREBRED BREEDING
0102.21.0050	HTSUS	OTHER FEMALE PUREBRED BREEDING
0102.29.2011	HTSUS	OTH COW IMPRT F/DAIRY, WT <90KG
0102.29.2012	HTSUS	OTH COW IMPRT F/DAIRY, WT =>90KG
0102.29.4024	HTSUS	OTH MALE LV BVNE ANM <90 KG EA

2. Select a commodity code record to close the window. Your selection now displays in the *Secondary Codes* panel. Repeat this process to add multiple secondary codes.

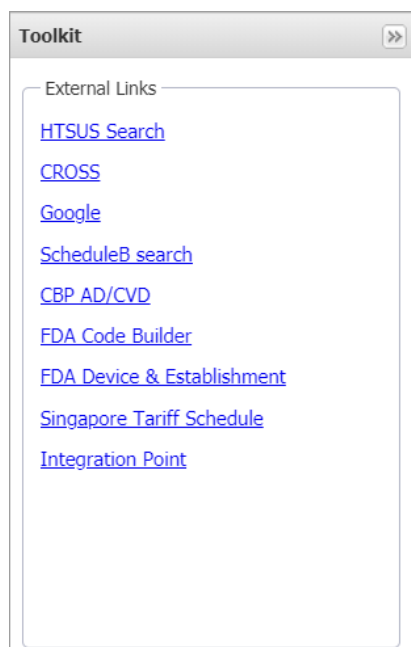
Note It is not possible to add the same secondary code more than once.

Toolkit

The *Toolkit* panel contains useful external links that support the classification process and are relevant to the importing country. Click an item in the list to visit the external website.

Fig. 2.62

Toolkit

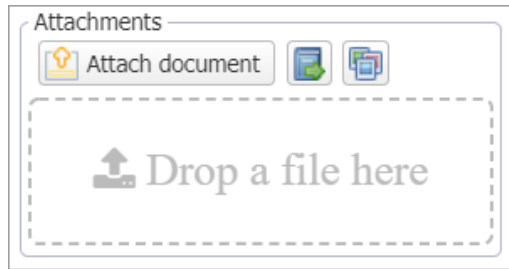


Attachments

You can add supporting documentation and files to a product in the *Attachments* panel of the *Classification Worksheet* window; for example, product pictures, Free Trade Agreement Certificates, technical drawings, or customs rulings.

Fig. 2.63

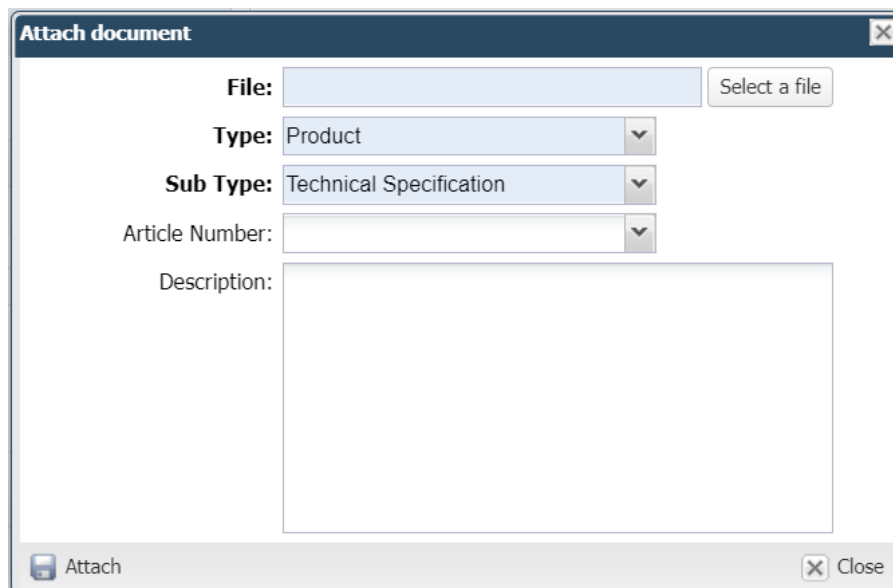
Attachments panel



To upload a file, drag and drop it into the area indicated, or click the *Attach Document* button. The *Attach Document* window displays.

Fig. 2.64

Attach Document Window



Complete the mandatory fields and click *Attach* to upload and attach the file to the product or article.

To view all documents that are attached to the product and articles, click the *See all documents*  button. You can delete an attached document by selecting it and clicking the *Delete* button. You also have the option of downloading a document by selecting it and clicking the *Download* button.

Fig. 2.65

Download Document Button



To view all images, click the *See all images*  button. The *All Images* window displays, where you can modify image descriptions.

Use the left and right arrows to view the previous or next attached image.

Fig. 2.66

All Images Window



Classification Status

The *Classification Status* field in both Simple and Advanced View is used to validate that a product is being classified appropriately.

Fig. 2.67

Classification Status Field, Simple View

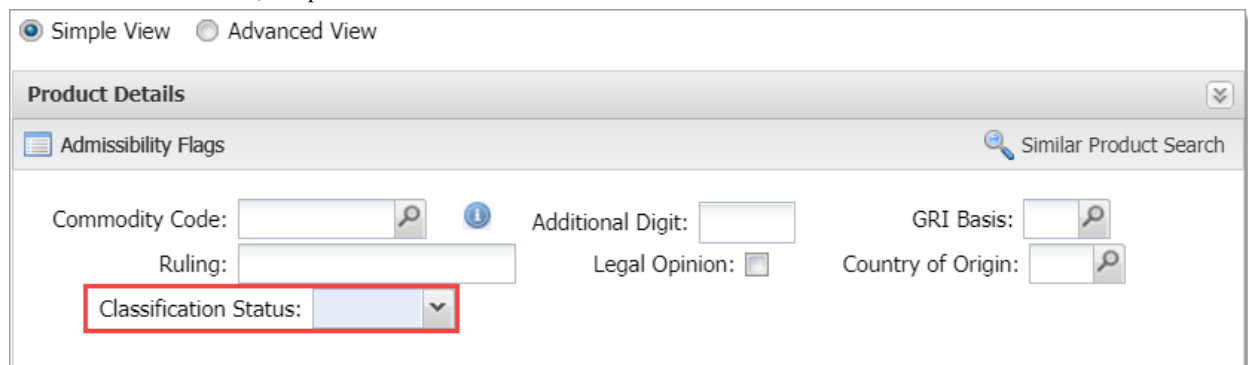


Fig. 2.68

Classification Status Field, Advanced View

Classification Worksheet - Product: 0294847

Importing Country: US - UNITED STATES Country Override Compliance Hold

Commercial Description:
guide test

Supporting Comments:

Customs Description:

Commodity Code:

GRI Basis:

Ruling:

Additional Digit:

Country of Origin:

Classification Status:

☐ Simple View ☒ Advanced View

The three available options in the *Classification Status* drop-down list are described in the table below.

Table 2.1

Classification Status Options

Status	Description
TCSUP	Product classified by the supplier. When this status is applied, users can select the <i>Save for Later</i> option on the Classification Worksheet. The <i>Save</i> option is unavailable.
TCFSH	Product received initial classification from Trade Compliance team, requires approval/review. When this status is applied, users select the <i>Save for Later</i> option on the Classification Worksheet. The <i>Save</i> option is unavailable.
TCCHK	Product classified by the Trade Compliance team and ready for use. When this status is applied, users can select either the <i>Save</i> or <i>Save For Later</i> option on the Classification Worksheet.

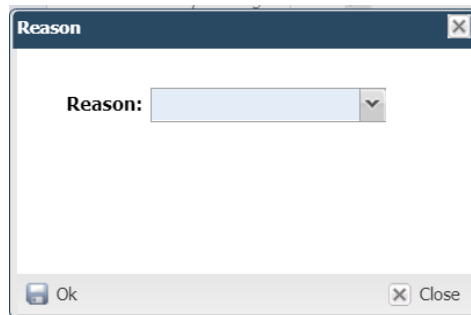
Note The Classification Status can be removed by a system administrator.

Reason

If you apply changes to the Classification Worksheet, or there is a new classification, you must supply an explanation in the *Reason* pop-up window when you save it. Select the relevant reason in the drop-down list provided and then click *Ok*.

Fig. 2.69

Reason



Save

An article must have the following minimum requirements to save:

- Commercial Description
- Customs Description Commodity Code
- Classification Status

When you click *Save*, the *Product Classification Summary* window displays. This outlines all of the inputted information on the Classification Worksheet. Click *Continue* to confirm that all inputs are correct and return to the Product Master.

Fig. 2.70

Product Classification Summary Window

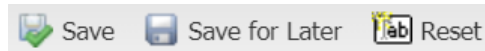


Save for Later

The *Save for Later* button at the bottom of the *Classification Worksheet* window allows you to save incomplete work. It keeps existing details but does not add the data to the Item Master product database. The feature is useful if you want to close the Classification Worksheet without completing the mandatory fields.

Fig. 2.71

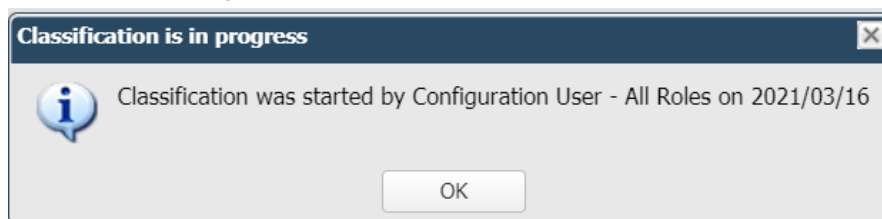
Save for Later



When you resume editing on a record that was saved for later, a pop-up window displays the user that last modified it and the date on which they saved the details.

Fig. 2.72

Classification is in Progress Window



Reset

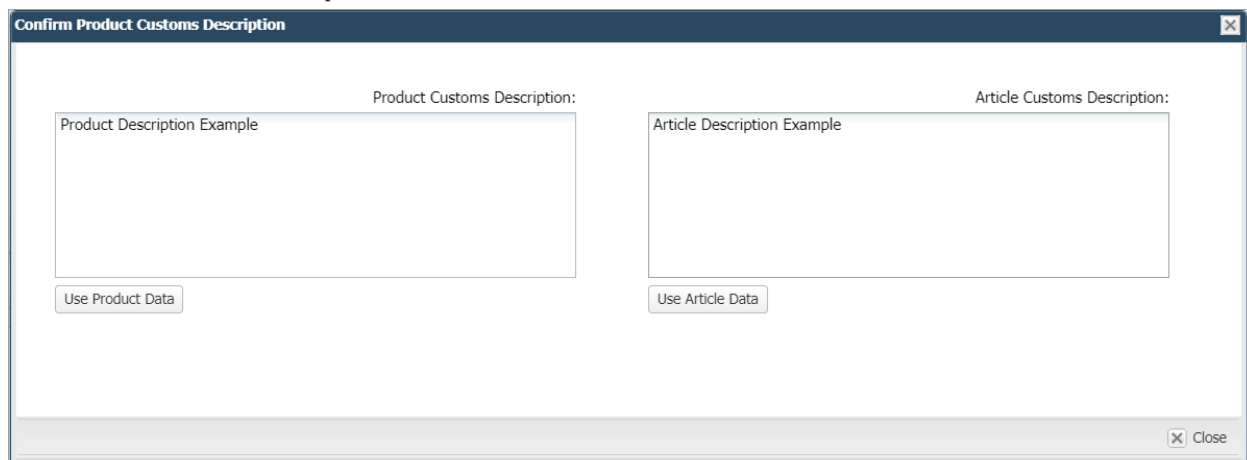
The *Reset* button at the bottom of the *Classification Worksheet* window restores the product details that were present at the most recent save. If it was not previously saved, the Classification Worksheet details reset to the default settings.

Confirm Product Customs Description

When you save the Classification Worksheet, you may be presented with the *Confirm Product Customs Description* window. This occurs if there is a single article associated with the product and the value in its *Description* field does not match the value in the product's *Customs Description* field.

Fig. 2.73

Confirm Product Customs Description Window



To match the descriptions, select either the *Use Product Data* button or the *Use Article Data* button to populate the relevant field and save the Classification Worksheet.

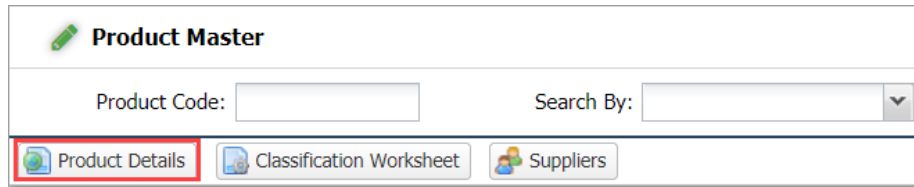
Product Details Portal

The Product Details portal is used to capture product details regarding customs admissibility requirements. It also provides an audit log for the product.

To access the Product Details portal, select a product in the Product Master grid and click the *Product Details* button.

Fig. 2.74

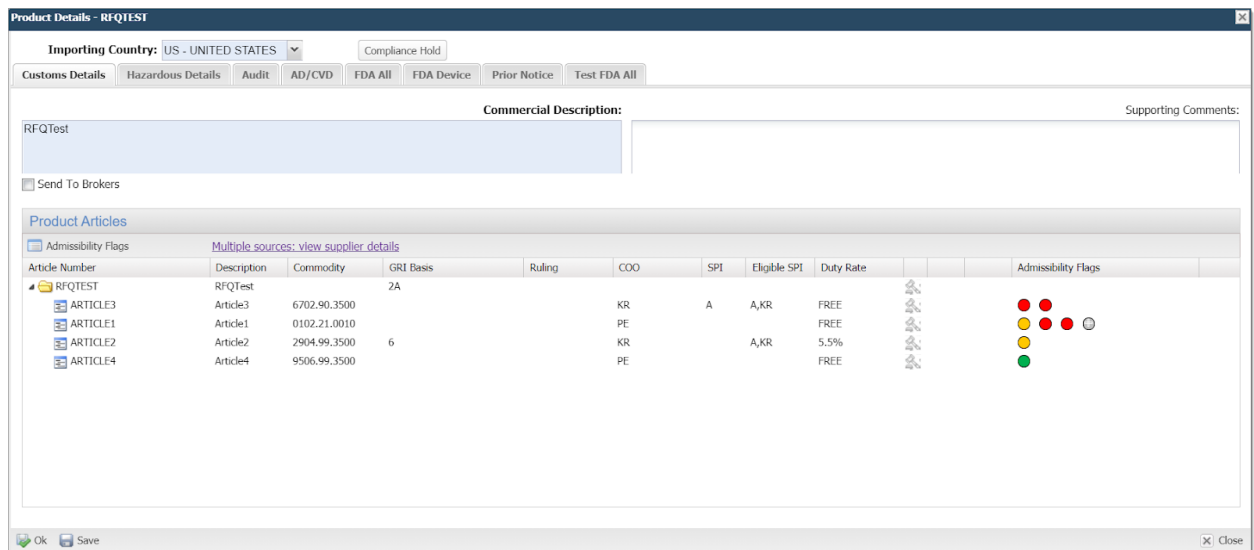
Product Details Button, Product Master Page



The image shows the 'Product Master' interface. At the top, there is a 'Product Code' input field and a 'Search By' dropdown menu. Below these, there are three buttons: 'Product Details' (highlighted with a red box), 'Classification Worksheet', and 'Suppliers'.

Fig. 2.75

Product Details Window



The image shows the 'Product Details - RFQTEST' window. It has a top bar with 'Importing Country: US - UNITED STATES' and a 'Compliance Hold' button. Below this are several tabs: 'Customs Details', 'Hazardous Details', 'Audit', 'AD/CVD', 'FDA All', 'FDA Device', 'Prior Notice', and 'Test FDA All'. The 'Customs Details' tab is active, showing a 'Commercial Description' field with 'RFQTest' and a 'Supporting Comments' field. Below this is a 'Send To Brokers' checkbox. The main section is titled 'Product Articles' and contains a table with columns: Article Number, Description, Commodity, GRI Basis, Ruling, COO, SPI, Eligible SPI, Duty Rate, and Admissibility Flags. The table lists four articles: RFQTEST, ARTICLE3, ARTICLE1, and ARTICLE4, each with their respective details and admissibility flags (represented by colored dots).

The details for the product are country-specific, enabling you to maintain different classification data for various countries.

Fig. 2.76

Importing Country Field



The image shows the 'Product Details - 011140' window. It features an 'Importing Country' dropdown menu (highlighted with a red box) set to 'US - UNITED STATES' and a 'Compliance Hold' button.

Compliance Hold

You can assign a Compliance Hold on any tab in the Product Details portal.

Fig. 2.77

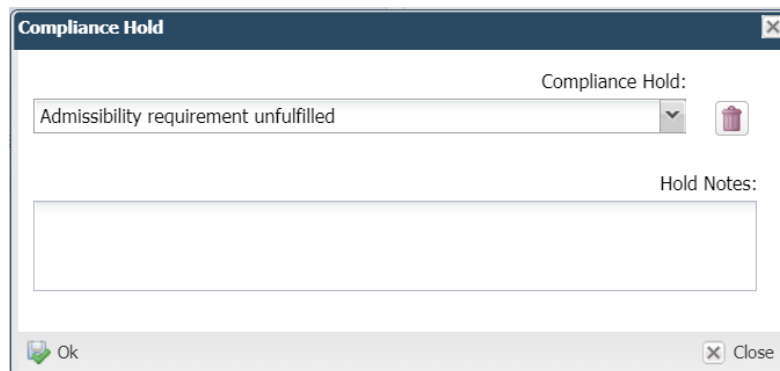
Compliance Hold Button



Click the *Compliance Hold* button to access the *Compliance Hold* window.

Fig. 2.78

Compliance Hold



This feature functions in the same way as the Compliance Hold feature in the Classification Worksheet. For more information, see the *Compliance Hold* section.

Tabs

There are several tabs in the *Product Details* window that enable you to log details against a product. The following tabs are described in this guide:

- Customs Details
- Hazardous Details
- Audit
- AD/CVD

Customs Details

The primary feature within the *Customs Details* tab is Admissibility Flags. Admissibility Flags add visualization and highlight requirements for applicable Partner Government Agencies (PGAs) and Additional Duties (Duty Add) for the product or articles in question. The Importing Country can only be changed to products saved on the Classification Worksheet. Admissibility Flags are country/country group-specific.

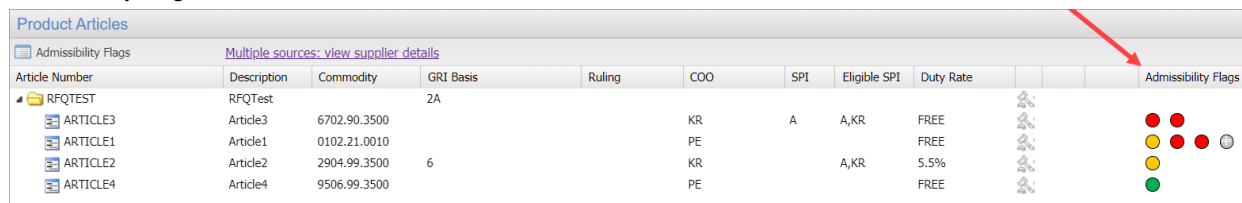
Admissibility Flags

Both PGA and Duty Add flag types appear in the *Admissibility Flags* column in the *Product Articles* panel.

Note Adding commodity codes ensure that the relevant flags appear. Commodity Codes are added on the Classification Worksheet.

Fig. 2.79

Admissibility Flags Column



Product Articles										
Admissibility Flags Multiple sources: view supplier details										
Article Number	Description	Commodity	GRI Basis	Ruling	COO	SPI	Eligible SPI	Duty Rate		Admissibility Flags
RFQTEST	RFQTest		2A							
ARTICLE3	Article3	6702.90.3500			KR	A	A,KR	FREE		● ● ● ● ●
ARTICLE1	Article1	0102.21.0010			PE			FREE		● ● ● ● ●
ARTICLE2	Article2	2904.99.3500	6		KR		A,KR	5.5%		● ● ● ● ●
ARTICLE4	Article4	9506.99.3500			PE			FREE		● ● ● ● ●

The flags are color-coded as follows:

Table 2.2

Admissibility Flag Colors

Flag Color	Description
Orange	A decision has not been made on the flag.
Red	Flag marked as either applicable or flag was manually added.
Green	Flag marked as not applicable.

Note If more than 4 flags exist for a single article, a + icon is used to indicate this after the third flag.

You can hover over a flag to view the current status and any other applicable details.

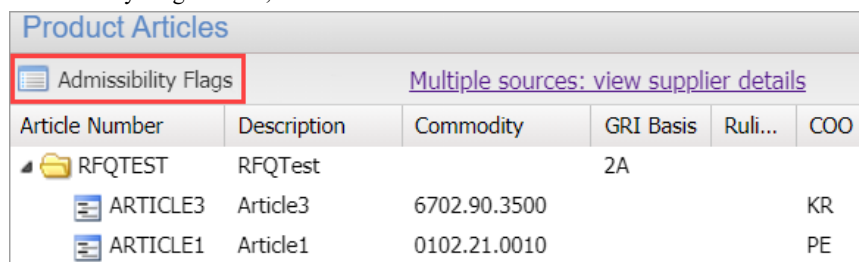
If a product has multiple suppliers, the *Multiple sources: view supplier details* option appears at the top of the *Product Articles* grid. Clicking this opens a window to the Suppliers portal. For more information, see the *Suppliers* section.

Product Admissibility Flags

Within the *Customs Details* tab, a dedicated *Admissibility Flags* portal enables you to maintain records. To access this feature, click the *Admissibility Flags* button at the top of the *Product Articles* panel.

Fig. 2.80

Admissibility Flags Button, Product Articles Panel



Product Articles					
Admissibility Flags Multiple sources: view supplier details					
Article Number	Description	Commodity	GRI Basis	Ruli...	COO
RFQTEST	RFQTest		2A		
ARTICLE3	Article3	6702.90.3500			KR
ARTICLE1	Article1	0102.21.0010			PE

On the *Product Admissibility Flags* page, you can view and manage all of the admissibility flags for your product.

Fig. 2.81

Product Admissibility Flags

Product Admissibility Flags - RFQTEST

Importing Country: US - UNITED STATES

Description: RFQTest

Back

ApplicableNot Applicable✖+−📄ℹ

Product/Article	Admissibility Flag	Commodity Description	Flag	Measure Type	Status
ARTICLE1 HTSUS - 0102210010	AM2 - AMS Flag 2 - Data related to shell eggs is required Article1	MALE DAIRY PUREBRED BREEDING	AM2	AFAM2	Red
ARTICLE1 HTSUS - 0102210010	AM7 - AMS Flag 7 - AMS Data related to marketing orders is required Article1	MALE DAIRY PUREBRED BREEDING	AM7	AFAM7	Red
ARTICLE1 HTSUS - 0102210010	FD3 - FD Flag 3 - FDA Prior Notice Data may be required 801(m) Article1	MALE DAIRY PUREBRED BREEDING	FD3	AFFD3	Yellow
ARTICLE3 HTSUS - 6702903500	AM4 - AMS Flag 4 - AMS Data related to marketing orders is required Article3	ARTIFICIAL FLOWERS,MAN-MD FIB	AM4	AFAM4	Red

The table below describes the buttons on this page.

Table 2.3

Product Admissibility Flags Page Buttons

Button	Description
Applicable	Applicable. Only for automatically added flags.
Not Applicable	Not Applicable. Only for automatically added flags.
✖	Cancel Applicable Decision. Only for automatically added flags (after designating Applicable or Not Applicable).
+	Add Admissibility Flag. Only for manually added flags.
-	Delete Admissibility Flag. Only for manually added flags (after using Add Admissibility Flag).
📄	Show Commodity Flag Determination Data. For both automatically and manually added flags.
ℹ️	Show Additional Information. For both automatically and manually added flags.

By selecting a record and clicking the *Show Commodity Flag Determination Data* option, users can see why a particular flag was assigned. This applies to flags that appear automatically.

Fig. 2.82

Trade Measure Flag Determination Data

Trade Measure Flag Determination Data - PGA Flag: AM7									
Na...	Measure Ty...	Content Ty...	Commodity ...	Start Date	End Da...	Origin country group	Destination country group	Descripti...	Reason
AM7	AFAM7	BASE	0102210010			OMNES	US		BASE

In the *Trade Measure Flag Determination Data* window, double-click a record to view further flag information.

Fig. 2.83

Trade Measure Flag Determination Data - Subsection

Trade Measure Flag Determination Data - PGA Flag: AM7

Na...	Measure Ty...	Content Ty...	Commodity ...	Start Date	End Da...	Origin country group	Destination country group	Descripti...	Reason	Not
AM7	AFAM7	BASE	0102210010			OMNES	US		BASE	

AM7

Measure Type: AFAM7

Commodity ID: 0102210010

Origin country group: OMNES

Destination country group: US

Legal Bases:

Content Type: BASE

Description:

Reason: BASE

Note:

Start Date:

End Date:

Close

Automatically Added Flags

Flags often appear automatically due to configuration settings and the applicable commodity code. These flags are highlighted in orange until they are marked Applicable or Not Applicable. The flag color then changes to red or green respectively.

When these flags appear automatically, you can mark the flag Applicable or Not Applicable using the corresponding buttons on the *Product Admissibility Flags* page.

When you select a record in the *Product Admissibility Flags* grid and click the *Applicable* button, the following pop-up window displays:

Applicable

Fig. 2.84

Applicable Window

Similarly, clicking the *Not Applicable*  button prompts the pop-up window indicated below. However, the *Reason* field is now mandatory.

Fig. 2.85

Not Applicable Window with Mandatory Reason Field

Note If you specify *Other* as the explanation in the *Reason* field, the *Note* field then becomes mandatory.

When you complete the fields in this window, the *Cancel Applicable Decision*  button becomes available for the record. Using this button, you can undo your previous action and mark the flag as either Applicable or Not Applicable again.

The below pop-up window displays if you click the *Cancel Applicable Decision* button.

Fig. 2.86

Cancel Applicable Decision Window

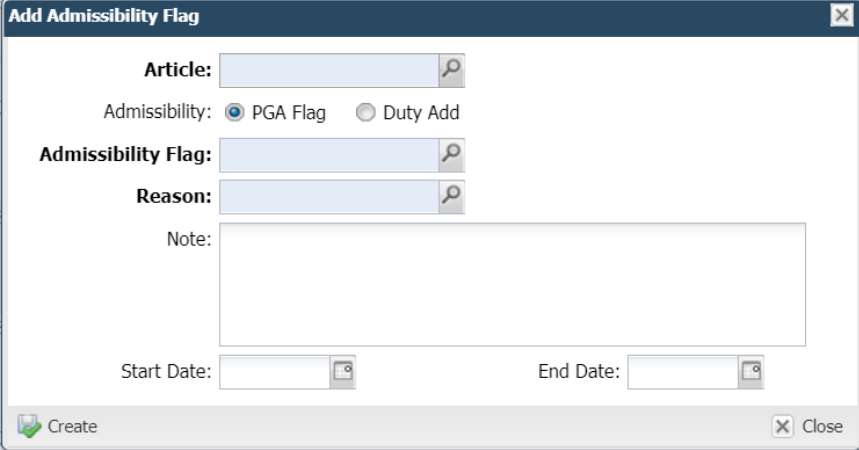
Manually Added Flags

You have the option of manually adding flags to a product or article. If applied, the manually added flag appears in red and only for that specific particular product or article. Unlike an automatic flag, this update is not universal.

To manually add a flag, click the *Add Admissibility Flag*  button on the *Product Admissibility Flags* page. The *Add Admissibility Flag* window displays.

Fig. 2.87

Add Admissibility Flag Window



The *Article* field appears if more than one article exists.

The lookup field options change depending on whether you select the *Pga Flag* or *Duty Add* options on the *Admissibility* field.

After you complete the mandatory fields, click *Create* to close the window and add the flag to the article.

Hazardous Details

Using the *Hazardous Details* tab, you can manage hazardous and dangerous materials that are associated with your goods.

Fig. 2.88

Hazardous Details Tab

Product Details - 011140

Importing Country: **US - UNITED STATES** Compliance Hold

← **Customs Details** **Hazardous Details** Audit AD/CVD FDA All FDA Device Prior Notice Test FDA All TF OGA TF Prior Notice →

Hazardous Product: ☐

Hazmat class by ...

... Sea: ... Post:

... Rail: ... Fixed Transport:

... Road: ... Inland Waterway:

... Air: ... Own Propulsion:

EPA Hazardous Waste Code: Hazardous Material Description:

Packaging Group Code: ☐ 1 (Great Danger) ☐ 2 (Medium Danger) ☐ 3 (Minor Danger)

Comments:

Ok Save Close

Audit

In the *Audit* tab, you can view audit log details for the product in question.

Fig. 2.89

Audit Tab

Product Details - RFQTEST

Importing Country: **US - UNITED STATES** Compliance Hold

Customs Details Hazardous Details **Audit** AD/CVD FDA All FDA Device Prior Notice Test FDA All

Audit Category: Audit Subcategory: Summary View: Search

- Product: RFQTEST
 Import Country: US - UNITED STATES, Commodity Group: HTSUS
 Requested commodity classification review of: QAITCADM (QA ITC Admin User) Status: NEW [Low]
 NEW
 New product that requires a commodity code for importing
 RFQ (Robert Moloney), 15/07/2020 16:36:02 UTC+0

New Classification Request Deleted - Product: RFQTEST
 Import Country: US - UNITED STATES, Commodity Group: HTSUS
 Product classification changes saved to item master
 RFQ (Robert Moloney), 19/08/2020 13:54:52 UTC+0

New Classification Request - Product: RFQTEST
 Import Country: US - UNITED STATES, Commodity Group: HTSUS
 Requested commodity classification review of: M8F (Manogna Kamineni) Status: NEW [Medium]
 New product that requires a commodity code for importing
 RFQ (Robert Moloney), 25/08/2020 11:37:30 UTC+0

New Classification Request Deleted - Product: RFQTEST
 Import Country: US - UNITED STATES, Commodity Group: HTSUS
 Product classification changes saved to item master
 RFQ (Robert Moloney), 25/08/2020 11:54:17 UTC+0

DCA Flag - Product: RFQTEST

1 of 1 Per Page 25 1 - 18 of 18

Ok Save Close

To hide the details of each item in the log and view only the title, enable the Summary View field.

Fig. 2.90

Summary View Field, Audit Tab

Product Details - 011140

Importing Country: **US - UNITED STATES** Compliance Hold

Customs Details Hazardous Details **Audit** AD/CVD FDA All FDA Device Prior Notice Test FDA All TF OGA TF Prior Notice TF Export C

Audit Category: Audit Subcategory: Summary View: Search

AD/CVD

You can view and maintain AD/CVD (Anti-Dumping and Countervailing Duties) records in the *AD/CVD* tab.

Fig. 2.91

AD/CVD tab

To create a new AD/CVD record click the *Create*  button in the toolbar. The *AD/CVD [Create]* window displays.

Fig. 2.92

AD/CVD [Create]

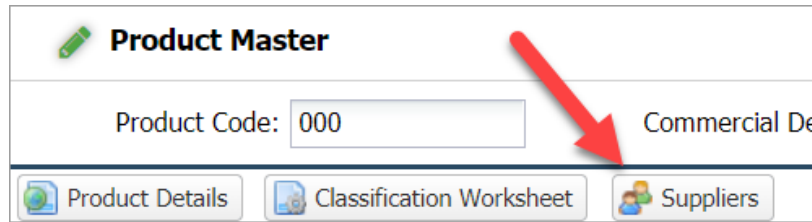
Note The *Article Number* field only displays if multiple articles for the product exist.

Suppliers Portal

The Suppliers portal enables you to maintain supplier details and records for a product. To access it, select a product in the *Product Master* grid, and click the *Suppliers* button.

Fig. 2.93

Suppliers Button, Product Master Page



The *Product Suppliers* window displays.

Fig. 2.94

Product Suppliers Window

Product Suppliers - RFQTEST

Sequence	Supplier	Importing Country	Supplier Name	Preferred Supplier	Compliance Hold Name	Active Suppl...	Manufacturer	Manufacturer Name	Manufacturer Product Reference	FTA Solicitation	Sender
10	4250	US	Central Gas Stations	☐		☐				No request sent	
20	QA8802	US	Cypress Hills Community Centre	☐		☐				No request sent	
30	3111972	FR	Supplier ABC	☐		☐				No request sent	
40	001	IE	Example Address	☐		☐				No request sent	

Article Number	Commodity Code	Description	Country of Origin	SPI	Selling UOM	Selling Price
ARTICLE1	0102.21.0010	Article1	KR			0
ARTICLE2	2904.99.3500	Article2	AD			0
ARTICLE3	6702.90.3500	Article3	KR	A		0
ARTICLE4	9506.99.3500	Article4	CN			0

This window contains two panels:

- The upper grid lists the suppliers of the product.
- The lower grid lists the articles associated with the selected supplier.

Creating Suppliers

To add a supplier, click the *Create Product Supplier*  button in the *Product Suppliers* grid toolbar. The *Product Supplier [Create]* window displays. Complete the mandatory fields and include any other relevant information. Then click *Create*.

Fig. 2.95

Product Supplier [Create] Window

You can also update and delete suppliers from the product using the *Update*  and *Delete*  buttons in the same toolbar.

Product Article Supplier Information

When you select a supplier record in the upper grid, the lower grid is populated with its associated articles.

Note It is not possible to add new articles to a product in this area. This is only possible through the Classification Worksheet. However, you can update certain article details.

Update Product Article Supplier Information

To update product article supplier information, select an article in the lower grid and click the *Update*  button in the toolbar.

Note If the lower grid remains empty after selecting a supplier, this indicates that no articles are associated with the product, or the importing country set for the supplier has not been classified.

The fields in the *Product Article Supplier [Update]* window vary depending on the values added in the Classification Worksheet.

Fig. 2.96

Full Product Article Supplier [Update] Window

Fig. 2.97

Simple Product Article Supplier [Update] Window

If the *Country of Origin* field is completed on the Classification Worksheet, the same field is automatically populated in the *Product Article Supplier* window. If you change the country of origin value in the *Product Article Supplier* window, this change is not reflected in the Classification Worksheet.

If the GRI Basis for the product is set to 3C, only one of the articles utilizes the full *Product Article Supplier [Update]* window. All other articles are presented in the simple *Product Article Supplier [Update]* window.

If a particular article is an essential component of a product, this article is presented in the full *Product Article Supplier [Update]* window. If no essential character exists, the full update form is displayed for the product with the highest commodity code in the sorted list; this is the item that contributes details to the classification procedure.

In the full *Product Article Supplier [Update]* window, the *Eligible SPI* field cannot be modified and is dependent on the country of origin. If a qualifying country is selected, predetermined letters acting as codes populate the *Eligible SPI* field. The user may then select an *SPI* to be associated with the article in the *SPI* field drop-down list.

Note If an eligible SPI is presented, it is not required to specify one.

Fig. 2.98

Full Product Article Supplier [Update] Window, SPI Selected

Product Article Supplier [Update]

Article Number: ARTICLE3

Supplier Article Ref:

Country of Origin: KR

Eligible SPI: A, KR

SPI: A

Selling UOM:

Selling Price: 0

Ok Close

Compliance Hold

The Compliance Hold feature—accessible through the *Product Suppliers* window—enables you to apply compliance holds to individual suppliers. See the *Compliance Hold* section for more information.

Fig. 2.99

Compliance Hold Button, Product Suppliers Window

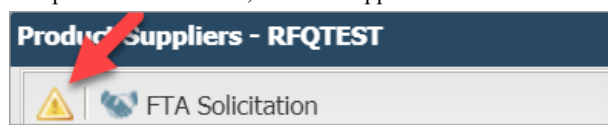


Fig. 2.100

Compliance Hold Window

Compliance Hold

Compliance Hold:

PGA requirement omitted

Reason:

Ok Close

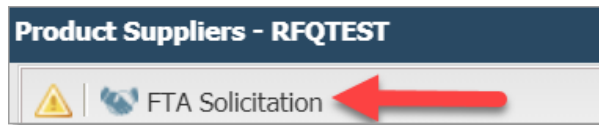
FTA Solicitation

The FTA Solicitation feature sends an email to procure Free Trade Agreements (FTA) from suppliers.

To access the FTA Solicitation portal, select a supplier record in the *Product Suppliers* window and click the *FTA Solicitation* button.

Fig. 2.101

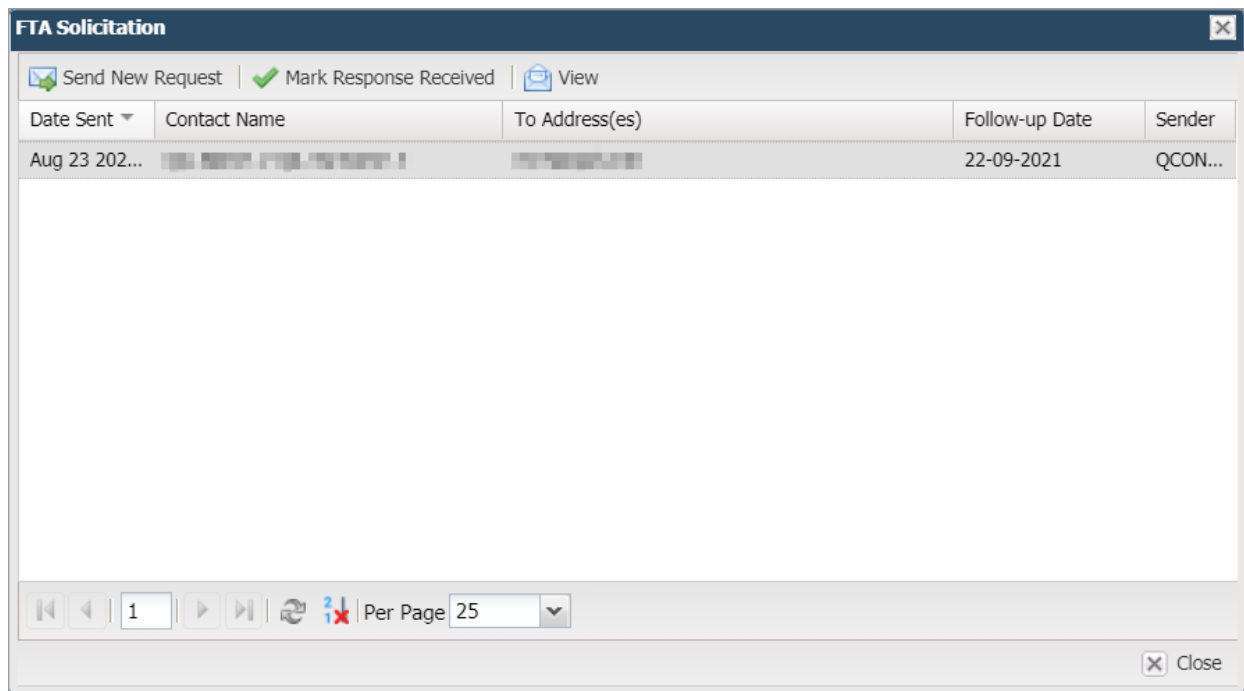
FTA Solicitation Button, Product Suppliers Window



The grid in the *FTA Solicitation* window lists any emails that have been sent so far.

Fig. 2.102

FTA Solicitation Window



Send New Request

To create a new email request for the supplier, click *Click the Send New Request* button. This displays the *Create Email Request* window.

Fig. 2.103

Send New Request Button



Fig. 2.104

Create Email Request Window

Table 2.4

Create Email Request Fields

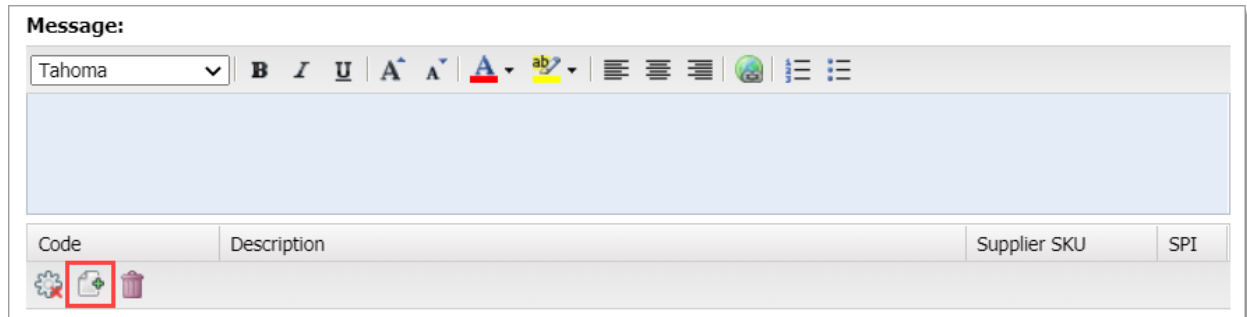
Field	Description
Supplier Name	This field is read-only.
Contact	This field may autofill, depending on the partner configuration.
To Address(es)	This field may autofill, depending on the partner configuration. You can add multiple email addresses by using a semicolon to separate them.
Reply Address(es)	You can add multiple Reply To email addresses by using a semicolon to separate them.
Follow-up Date	The default is 30 days from the current date. Note This field is for reference purposes only.
Template	Your administrator may have created and configured email templates. Click the lookup icon to select one.
Subject	Insert an email subject line.
Message	Compose an email and style it using the formatting options in the toolbar.

Adding Products

To add a product to the request, click the *Add Product* button.

Fig. 2.105

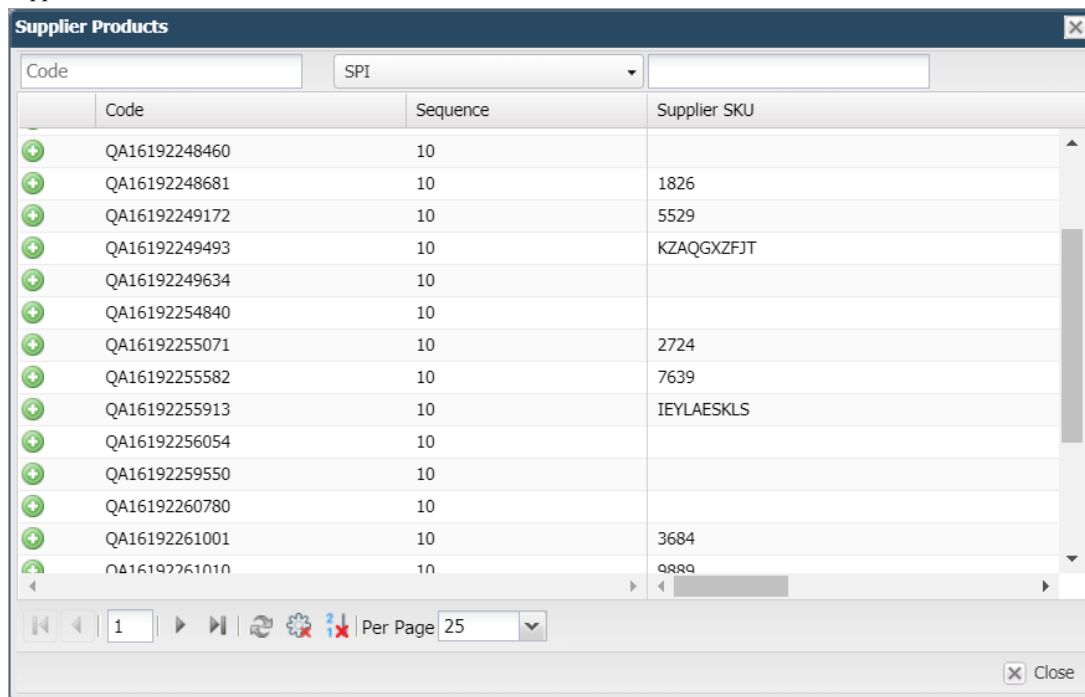
Add Product Button, Create Email Request Window



The *Supplier Products* lookup window displays. This grid contains all of the products that are associated with the selected supplier.

Fig. 2.106

Supplier Products Window



To add a product in the list to the FTA solicitation email, click the green plus  button on any record. Then click Close to save your selection.

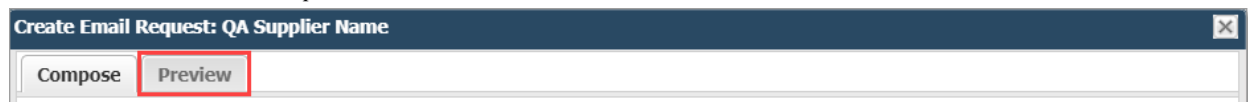
You can remove a product from an email in the same window by clicking the red delete  button on the previously added record.

Sending FTA Solicitation

The *Preview* tab in the *Create Email Request* window allows you to review the inputted details before sending.

Fig. 2.107

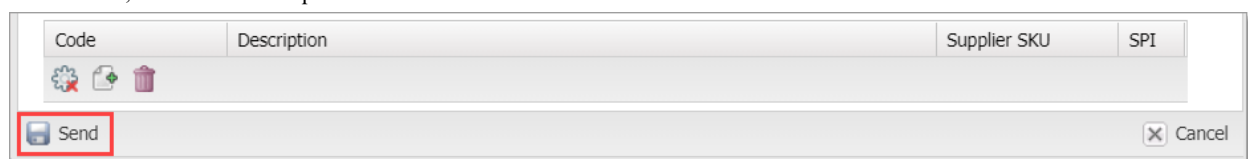
Preview Tab, Create Email Request Window



If all details are correct, click the *Send* button.

Fig. 2.108

Send Button, Create Email Request Window



Mark Response Received

After you receive a reply from the supplier to the FTA solicitation email, you can then indicate that a response was received.

To do this:

1. Click the *Mark Response Received* button. The *Mark Response Received* pop-up window displays.

Fig. 2.109

Mark Response Received Button, FTA Solicitation Window

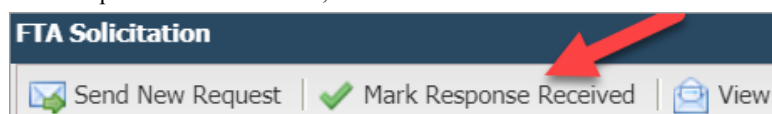
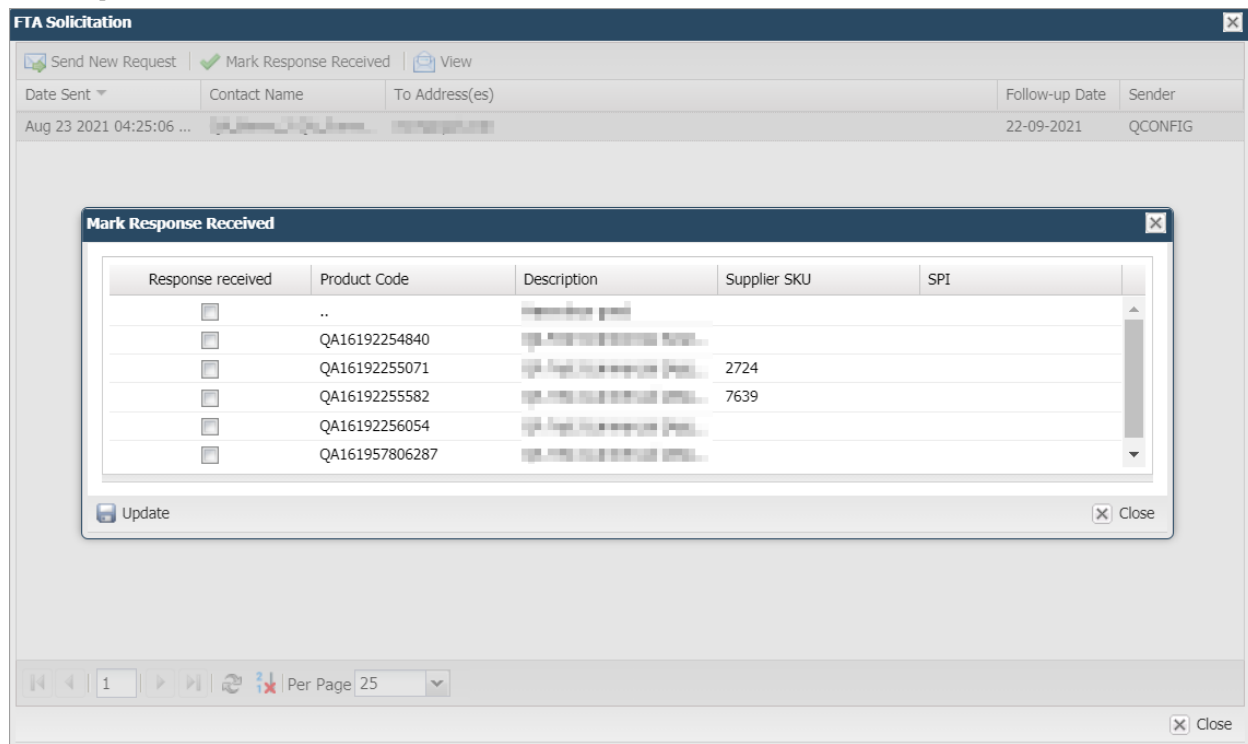


Fig. 2.110

Mark Response Received Window

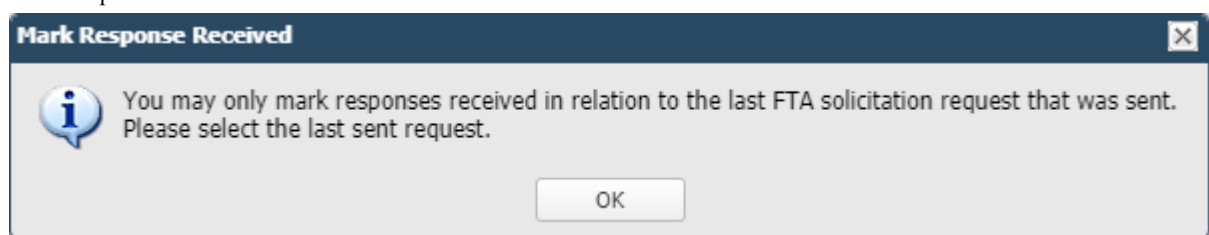


2. Use the checkboxes in the *Response Received* column to indicate whether a response was received for a particular product.
3. Click *Update* to close the window and save the changes.

Note When marking responses as received, you must select the most recent FTA solicitation for the selected supplier.

Fig. 2.111

Mark Response Received

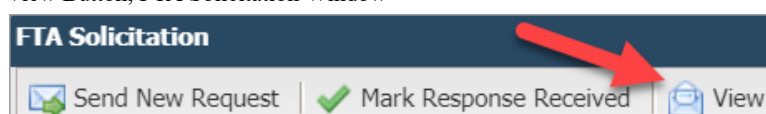


View

The *View* option in the *FTA Solicitation* window enables you to view the details of a previously sent email. Select a record in the grid and then click *View*.

Fig. 2.112

View Button, FTA Solicitation Window



The *Email Request* window displays.

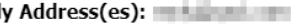
Fig. 2.113

View Sent Email

Email Request: AES Forwarder

Date Sent: Mar 16 2021 06:13:11 PM

To:  

Reply Address(es): 

Subject: Request for Certificate of Origin

Dear Supplier,

I hope this email finds you well.

We are emailing you regarding ...

Code	Description	Supplier SKU	SPI
ITC-BEACH-BALL	Beach Ball		

Close

Chapter 3

Workflow

This section describes how to use the Workflow portal with regard to the Purchase Order and Import Shipment workflows.

Overview

Explains how to access Workflow and describes the various elements in the portal.

Purchase Order Workflow

Describes the tasklist associated with a purchase order.

Import Shipment Workflow

Describes the tasklist associated with an import shipment.



Overview

A workflow is a set of tasks that is associated with a transaction. Workflows mirror business processes within a company.

QAD Precision's Workflow portal processes and captures information relating to imports. The main focus of this guide is the Purchase Order and Import Shipment workflow.

To access the Workflow portal, click the *Entry* drop-down in the top horizontal menu, and—depending on the workflow type that you want to work with—select *Import Shipment* or *Purchase Order*. Alternatively, access the FLOW option.

Fig. 3.1

Work with Import Entries in Main Menu

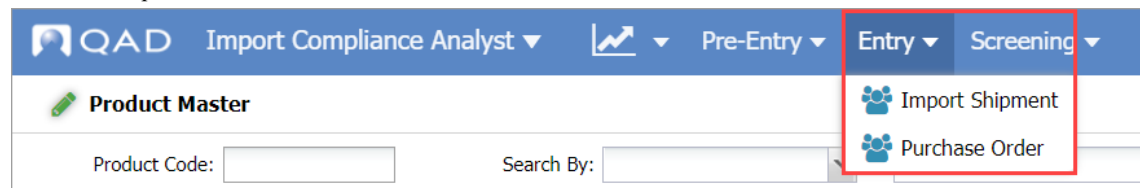


Fig. 3.2

Workflow Portal

Search

Open: Purchase Order: Order Number: Supplier: Importing Country:

Group: QTGLUSER User ID: Supplier Division: Compliance Status: Ship From: Ship To: Product Code:

Client: Reference No.: PO Type: Exporting Country: Consignee: Commodity Code:

Purchase Orders

Workflow	PO Type	Reference	User Id	Order Number	Order Date	Supplier Division	Importing Country	Exporting Country
PO-US	DR	2570	QCONFIG	ABCONFIG1	20-May-2021		US	AT
PO-US	PR	2557	QCONFIG	9171694703	19-May-2021		FR	CH
PO-US	PR	2553	COA	9171694701	19-May-2021		FR	CH
PO-US	PR	2552	COA	9171694700	19-May-2021		FR	CH
PO-US	PR	2545	COA	9151681276	18-May-2021		GB	GB
PO-US	PR	2544	COA	9151681275	18-May-2021		GB	GB
PO-US	DR	2535	QCONFIG	5YU56767	15-May-2021		US	AT
PO-US	DR	2533	QCONFIG	765756	04-Jun-2021		US	AT
PO-US	DR	2532	QCONFIG	87658756	03-Jun-2021		US	AT
PO-US	DR	2531	QCONFIG	654	19-May-2021		US	AT
PO-US	PR	2530	ERROR	920000425	07-Dec-2020			

Page 1 of 10 | Select All | Create | Open Transaction | Displaying 1 - 11 of 106

The *Workflow* page is split into several different areas:

- Search panel
- Transaction panel
- Tasklist



For more information on the Workflow portal, see the *Base User Guide*.

Fig. 3.3
Workflow Panels

The screenshot displays the Workflow Portal interface. At the top is the **Search Panel** with various filters like Open, Purchase Order, Order Number, Supplier, Importing Country, Group, User ID, Supplier Division, Company, Client, Compliance Status, Ship From, Ult. Consignee, Reference No., PO Type, Ship To, Product Code, Exporting Country, Consignee, and Commodity Code. Below this is the **Transaction Panel** showing a table of Purchase Orders with columns for Workflow, PO Type, Reference, User Id, Order Number, Order Date, Supplier Division, Importing Country, Exporting Country, and Compa. To the right is the **Tasklist** section with tabs for web, all, and Requisite, and a list of tasks with columns for Status, Note, Description, Completed By, and Co.

Workflow	PO Type	Reference	User Id	Order Number	Order Date	Supplier Division	Importing Country	Exporting Country	Compa
PO-US	DR	2414	QCONFIG	10074	23-Apr-2021	FISHER	FR	CH	17_FR
PO-US	DR	2413	QCONFIG	10073	23-Apr-2021	FISHER	FR	CH	17_FR
PO-US	DR	2412	QCONFIG	435345	23-Apr-2021		US	AT	VN001
PO-US	DR	2411	QCONFIG	10072	23-Apr-2021	FISHER	FR	CH	17_FR
PO-US	DR	2410	QCONFIG	TEMP1A	23-Apr-2021		US	AT	VN001
PO-US	DR	2409	QCONFIG	10071	23-Apr-2021	FISHER	FR	CH	17_FR
PO-US	DR	2408	QCONFIG	6876546	23-Apr-2021		US	AT	VN001
PO-US	DR	2407	QCONFIG	5464645	23-Apr-2021		US	AT	VN001
PO-US	DR	2403	QCONFIG	65TERTGE	23-Apr-2021		US	AT	VN001
PO-US	DR	2400	QCONFIG	10068	19-Apr-2021		FR	CH	17_FR
PO-US	DR	2399	ERROR	10067	14-Apr-2021				
PO-US	DR	2398	QCONFIG	10065	19-Apr-2021		FR	CH	17_FR
PO-US	DR	2397	ERROR	100164	14-Apr-2021				
PO-US	DR	2396	ERROR	100163	14-Apr-2021				
PO-US	DR	2392	QCONFIG	100162	19-Apr-2021		FR	US	17_FR
PO-US	DR	2391	QCONFIG	100161	19-Apr-2021		FR	US	17_FR

You can also switch between workflows using the transaction type field in the search panel.

Fig. 3.4
Transaction Type Field, Workflow Search Panel

The screenshot shows the 'Work with Import Entries' section of the Workflow Search Panel. It includes a 'Search' section with an 'Open' dropdown menu and a 'Transaction Type' dropdown menu. The 'Transaction Type' dropdown is currently set to 'Import Shipment'. Below the dropdowns are fields for 'Client' and 'Reference No.', and a 'Search' button. A red arrow points to the 'Transaction Type' dropdown, and another red arrow points to the 'Search' button.

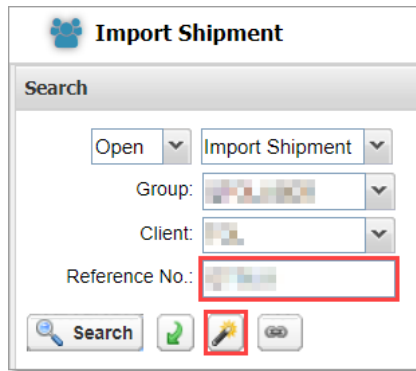
Note Different clients represent different datasets. Therefore, it is important to ensure that the correct client is selected in the *Client* field to locate specific purchase orders or import shipment records.

Workflow Assistant

You can use the Workflow Assistant feature to view details of a record. To access it, enter the record's reference number in the *Reference No.* field and click the *Workflow Assistant* button

Fig. 3.5

Workflow Assistant Button

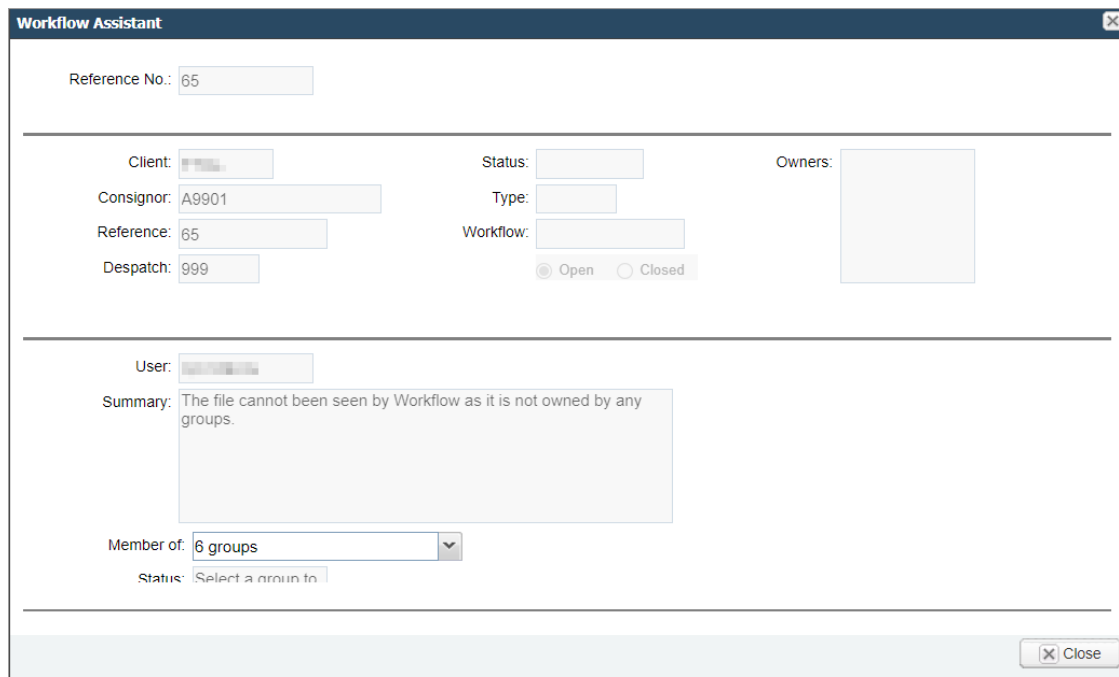


The screenshot shows the 'Import Shipment' window. It has a 'Search' section with a dropdown menu set to 'Open' and another dropdown set to 'Import Shipment'. Below these are fields for 'Group:', 'Client:', and 'Reference No.:'. The 'Reference No.' field is highlighted with a red rectangle. At the bottom, there are four buttons: 'Search' (with a magnifying glass icon), a green arrow button, a yellow key icon button (the 'Workflow Assistant' button, highlighted with a red rectangle), and a grey button with a speech bubble icon.

If the reference number matches an existing record, the *Workflow Assistant* window displays.

Fig. 3.6

Workflow Assistant Window



The screenshot shows the 'Workflow Assistant' window. At the top, the title bar says 'Workflow Assistant'. Below it, the 'Reference No.' field contains '65'. The main area is divided into two sections. The top section contains fields for 'Client:', 'Status:', 'Owners:', 'Consignor: A9901', 'Type:', 'Reference: 65', 'Workflow:', and 'Despatch: 999'. There are also radio buttons for 'Open' (selected) and 'Closed'. The bottom section contains a 'User:' field, a 'Summary:' box with the text 'The file cannot be seen by Workflow as it is not owned by any groups.', a 'Member of:' dropdown menu showing '6 groups', and a 'Status:' dropdown menu showing 'Select a group to'. A 'Close' button is located at the bottom right.

If the reference number does not match a record, the below window displays:

Fig. 3.7

No Transaction Found, Workflow Assistant Window

The Workflow Assistant window displays the following information:

- Reference No.:** 67656556456
- Client:** [Empty field]
- Consignor:** [Empty field]
- Reference:** [Empty field]
- Despatch:** 0
- Status:** [Empty field]
- Type:** [Empty field]
- Workflow:** [Empty field]
- Open/Closed:** ☐ Open ☐ Closed
- Owners:** [Empty field]
- User:** [Empty field]
- Summary:** No transaction records were found that match the reference number entered for the current client selected. A matching transaction simply does not exist for client 'TGL' in the PRECISION database and as such cannot be displayed in the Workflow screen. Check that you have typed the reference number correctly and that you are in the correct client.
- Member of:** 0 groups
- Status:** Select a group to
- Close:** [Close button]

Transaction Panel

The transaction panel displays the results of searches.

The *Workflow* and *PO Type/Type* columns for a workflow indicate the country of import and the type of purchase order or import shipment. In the example below, the *Workflow* column for the first record indicated that it is an EU Purchase Order, with a *PO Type* of Direct Shipment Purchase Order.

Fig. 3.8

Purchase Order Columns

Purchase Orders							
Workflow	PO Type...	Order Number	Order Date	User Id	Compliance Status	Supplier Division	Importing Country
PO-EU	DR	92_TST01-1	17-Nov-2020	QCONFIG	U	ROW	FR
PO-EU	DR	92_TST01-2	17-Nov-2020	QCONFIG	U	ROW	FR
PO-EU	DR	9200000120	18-Nov-2020	QCONFIG	U	US	US
PO-EU	PD	111111	18-Nov-2020	QCONFIG	FA	ROW	FR
PO-EU	DR	111111	18-Nov-2020	QCONFIG	FA	ROW	FR
PO-EU	DR	111111	18-Nov-2020	QCONFIG	FAIL	ROW	FR
PO-EU	DR	111111	18-Nov-2020	QCONFIG	FA	ROW	FR
PO-EU	DR	111111	18-Nov-2020	QCONFIG	FA	ROW	FR
PO-EU	DR	9200000146	09-Feb-2021	QCONFIG	FA	US	US
PO-EU	DR	7000001107	02-Feb-2021	QAD1	FA	ROW	FR
PO-EU	DR	12345	28-Mar-2021	R9A	U	US	US
PO-EU	DR	123456	28-Mar-2021	R9A	U	US	US
PO-EU	DR	1234567	28-Mar-2021	R9A	U	US	US
PO-EU	DR	ASD	16-Mar-2021	R9A	U	US	US

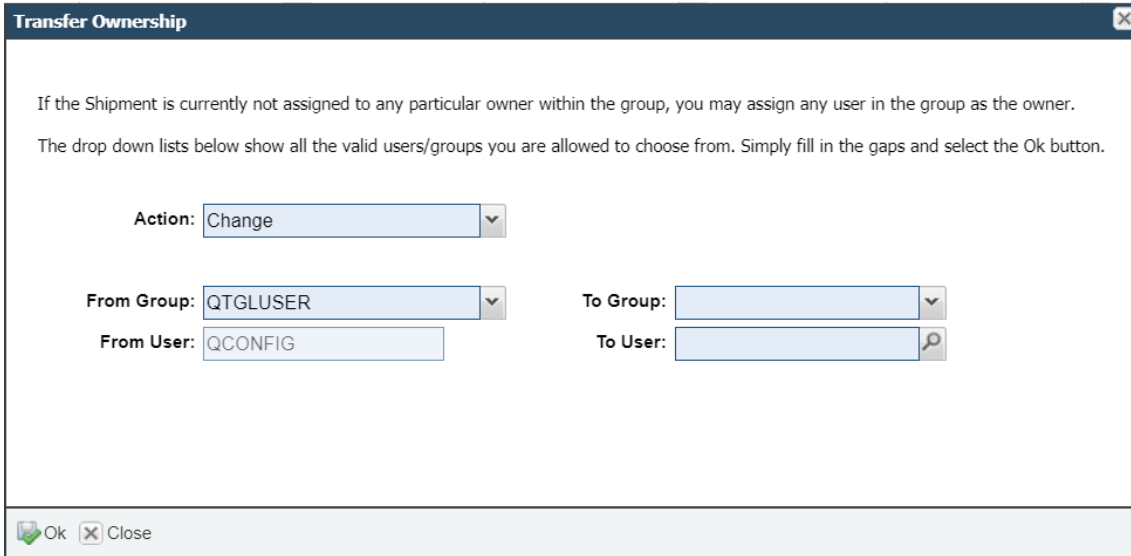
Transfer Ownership

The Transfer Ownership feature is used to assign a Workflow record to a particular user or group.

To do this, select a record in the grid and click the *Transfer Ownership*  button. The *Transfer Ownership* window displays.

Fig. 3.9

Transfer Ownership Window



Transfer Ownership

If the Shipment is currently not assigned to any particular owner within the group, you may assign any user in the group as the owner. The drop down lists below show all the valid users/groups you are allowed to choose from. Simply fill in the gaps and select the Ok button.

Action:

From Group: To Group:

From User: To User:

In this window, you can:

- Change the group and user to which the workflow is assigned
- Assign the workflow to a user
- Add a workflow to a new group and user

To change the assigned group and user:

1. In this *Action* field, select the *Change* option from the drop-down list.
2. The currently assigned group and user are displayed in the *From Group* and *From User* fields on the left. Select the new user and group using the *To Group* and *To User* fields on the right.
3. Click *Ok* to save the changes.

Tasklist

The *Tasks* panel displays a list of tasks. These form part of the workflow that is associated with the selected transaction. The tasks vary depending on the selected transaction in the grid; a purchase order or import shipment transaction. See the *Purchase Order Workflow* and *Import Shipment Workflow* sections for more information.

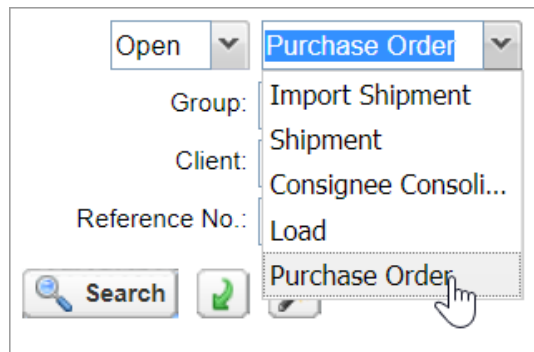
Purchase Order Workflow

Purchase orders are created manually or using an ERP system. When received from an ERP system, a Create message creates a purchase order and an Update message updates an existing record.

The following sections describe the tasklist associated with a purchase order. This tasklist contains various windows in which you can populate details related to a purchase order.

Fig. 3.10

Transaction Type Field, Purchase Order Selected



Select *Purchase Order* from the transaction type drop-down list to display purchase orders in the transaction panel. Alternatively, select *Purchase Order* in the *Entry* drop-down list in the top horizontal menu.

When you select a record, the associated tasklist displays in the *Tasks* panel.

Fig. 3.11

Purchase Order Tasklist, Tasks Panel

Tasks			
web	all	Requisite	
	Sta...	Note	Description
			Created by
			Compliance status
			Header Details
			Line Details
			Admissibility Flags
			Entities
			Run Compliance
			View Compliance Status

Note If a Purchase Order Payment message is received and no corresponding purchase order is found, a limited tasklist appears. If a purchase order Create message is received, this reverts to the tasklist displayed above. A Purchase Order Payment message with no corresponding purchase order is referred to as a draft until a matching purchase order is found.

Create Purchase Order Header

When created using an ERP system, the purchase order appears without further action.

To manually create a purchase order:

1. Click the *Create* button in the transaction panel toolbar.

Fig. 3.12

Create Button, Workflow Page



This displays the *Create Purchase Order* window.

Fig. 3.13

Create Purchase Order Window

The image shows the 'Create Purchase Order' window. At the top, there are fields for 'Load Template' (a dropdown menu) and 'Save Template' (a text input field). Below these are fields for 'Order Number', 'Order Date', 'Order Type', 'Language', and 'Importing Country' (set to 'US'). The main body of the window is divided into six sections, each with a 'Partner' dropdown and a 'Partner Details' text area: 'Company', 'Supplier', 'Ship To', 'Ship From', 'Consignee', and 'Ult. Consignee'. At the bottom, there are 'Create' and 'Clear Form' buttons, and a 'Close' button in the bottom right corner.

You can create purchase order templates in this window. These templates can then be reused, which allows you to speed up the process of creating a purchase order.

Fig. 3.14

Template Fields, Create Purchase Order Window

The image shows a close-up of the 'Create Purchase Order' window's header section. It features a 'Load Template' dropdown menu with 'Select a template...' as the selected option, and a 'Save Template' text input field with 'Enter a template name' as the placeholder text. A small floppy disk icon is located to the right of the 'Save Template' field.

To create a new template, complete the header fields; *Order Number*, *Order Date*, *Order Type*, *Language*, and *Importing Country*. Provide a name for the template in the *Save Template* field. Then click the *Save* button to the right of the field. To access a saved template, select the name of the template from the *Load Template* field drop-down list.

2. Complete the mandatory header fields, described in the table below.

Table 3.1

Create Purchase Order Fields

Field	Description
Order Number	The order number. Note The <i>Order Number</i> and <i>Order Date</i> combination cannot match an existing record.
Order Date	The order date. Note The <i>Order Number</i> and <i>Order Date</i> combination cannot match an existing record.
Order Type	Click the lookup icon to select an order type. Note The order type must be applicable to purchase orders
Language	Click the lookup icon to select the applicable language for the purchase order.
Importing Country	It is not possible to modify the <i>Importing Country</i> field. This value is automatically set depending on the client. Your administrator can associate a client with an importing country.

3. Click *Create* to save the new header and close the window.

Tasks

The following sections describe the tasks that comprise a purchase order workflow.

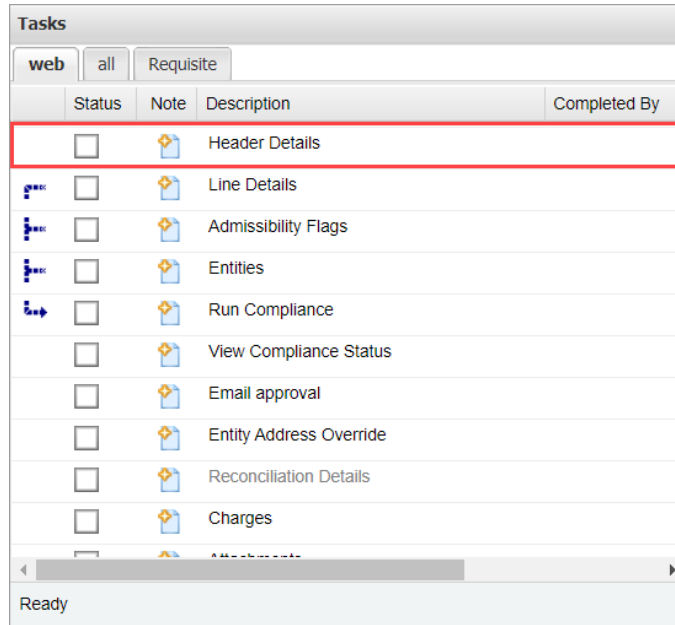
- Header Details
- Line Details
- Admissibility Flags
- Entities
- Run Compliance
- View Compliance Status
- Entity Override Address
- Reconciliation Details
- References
- Container Information
- Attachments
- Errors
- Close

Header Details

The *Header Details* task allows users to update details related to a purchase order. Double-click the *Header Details* task in the *Workflow Tasks* panel.

Fig. 3.15

Header Details Task



The *Header Details* window displays.

Fig. 3.16

Header Details Window, Manually Created

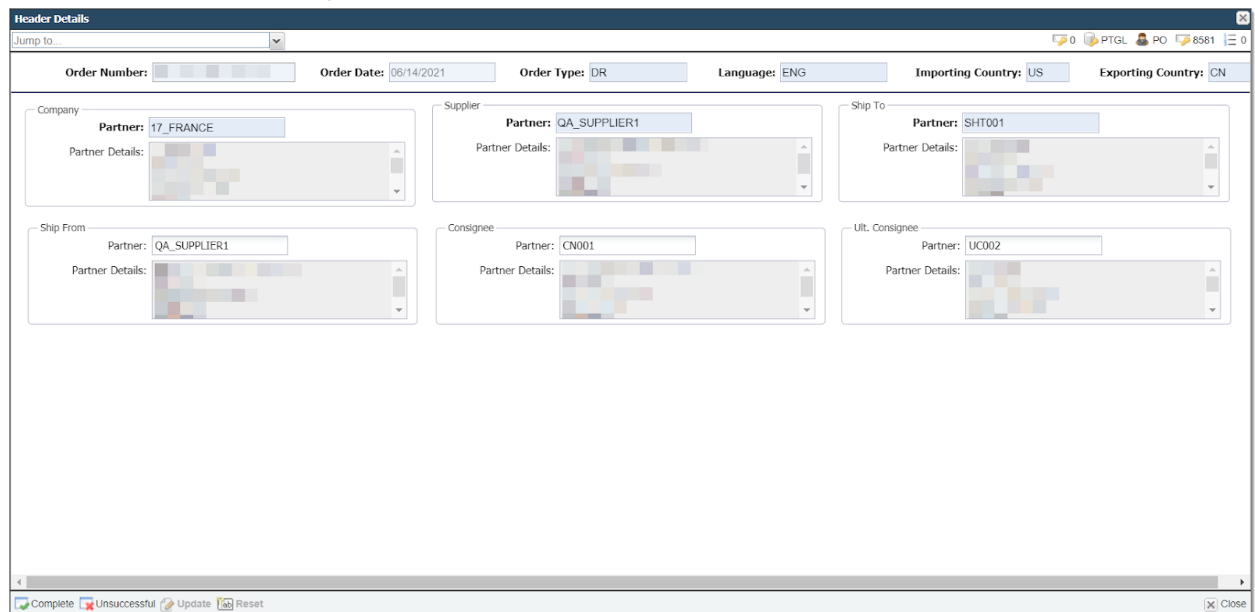


Fig. 3.17

Header Details, ERP System

Note The functionality available in this window depends on whether the purchase order was created manually or via an ERP system. It is possible to update details on this task for manually created purchase orders. Otherwise, fields cannot be modified and are read-only.

After updating the necessary details, click the *Complete* button to save the changes and close the window. A green check is now displayed in the *Status Column* beside the completed task.

Fig. 3.18

Completed Header Details Task

Tasks			
web all Requisite			
Status	Note	Description	Completed By
		Header Details	QCONFIG
		Line Details	
		Admissibility Flags	
		Entities	
		Run Compliance	
		View Compliance Status	
		Email approval	
		Entity Address Override	
		Reconciliation Details	
		Charges	
		Attachments	

Line Details

To access the *Line Details* window, double-click the *Line Details* task in the *Workflow Tasks* panel.

Fig. 3.19

Line Details Task

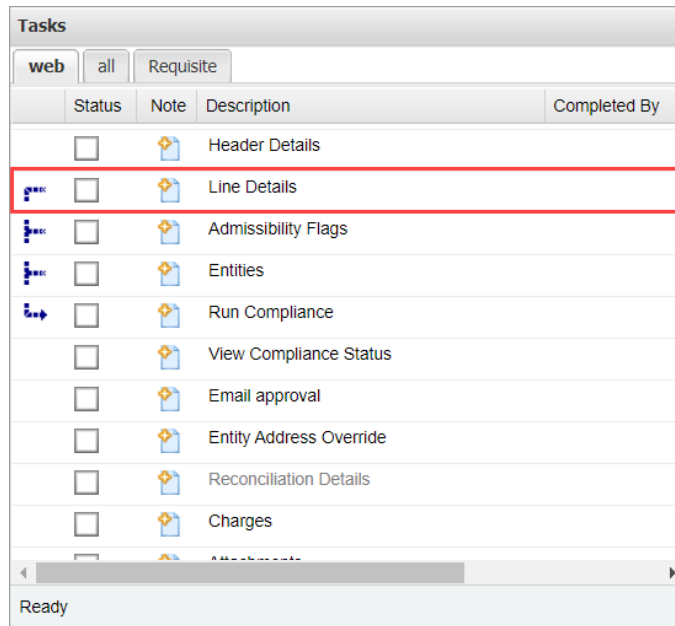
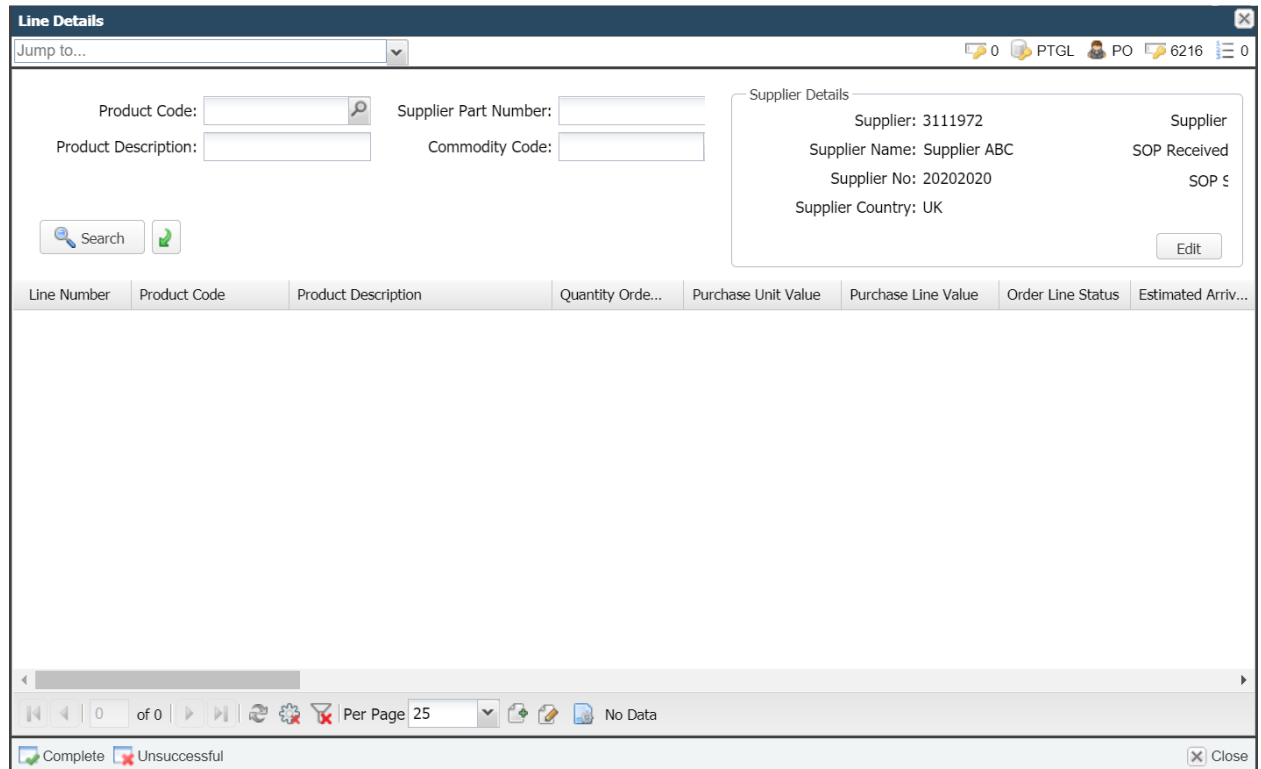


Fig. 3.20

Line Details Window



Products are listed in the *Line Details* grid if the purchase order was generated using an ERP system. However, if the purchase order was manually created, products must also be manually added.

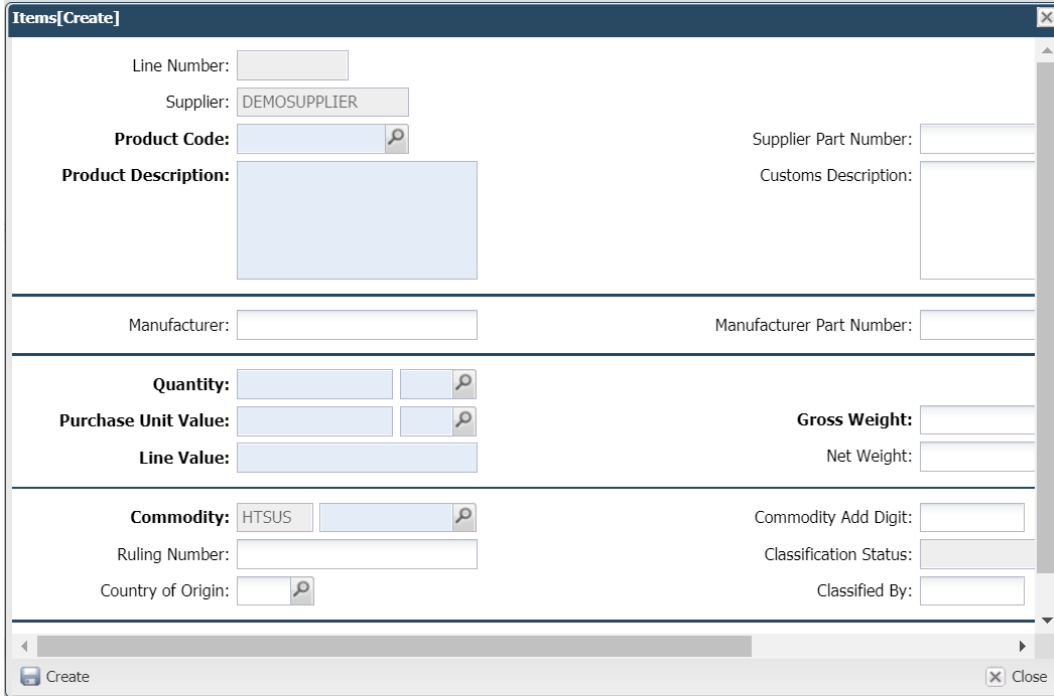
Note It is only possible to add products to manually created purchase orders.

To add a new product:

1. Click the *Add Line*  button in the toolbar. The *Items [Create]* window displays.

Fig. 3.21

Items [Create]



The screenshot shows the 'Items [Create]' window with the following fields and values:

- Line Number:** (empty)
- Supplier:** DEMOSUPPLIER
- Product Code:** (empty)
- Product Description:** (empty)
- Supplier Part Number:** (empty)
- Customs Description:** (empty)
- Manufacturer:** (empty)
- Manufacturer Part Number:** (empty)
- Quantity:** (empty)
- Purchase Unit Value:** (empty)
- Line Value:** (empty)
- Gross Weight:** (empty)
- Net Weight:** (empty)
- Commodity:** HTSUS
- Commodity Add Digit:** (empty)
- Ruling Number:** (empty)
- Classification Status:** (empty)
- Country of Origin:** (empty)
- Classified By:** (empty)

The window has a 'Create' button at the bottom left and a 'Close' button at the bottom right.

The information for the *Supplier* field is automatically generated from the *Header Details* task, or from when you created the workflow. The value in this field cannot be changed. The value in the *Supplier* field determines the options available in the *Product Code* field, which presents a list of products that are associated with the specified supplier only.

Note You can associate a product with a supplier in the *Suppliers* window, accessible from the *Product Master* page.

Fig. 3.22

Items [Create] with Product Details Added

The 'Items[Create]' window displays the following fields and values:

- Line Number: [Empty]
- Supplier: DEMOSUPPLIER
- Product Code: MOS-SPR
- Product Description: Mosquito Spray
- Supplier Part Number: 532A
- Customs Description: Repellants for i flies, mosquito. sensitive skin.
- Manufacturer: [Empty]
- Manufacturer Part Number: [Empty]
- Quantity: [Empty]
- Purchase Unit Value: [Empty]
- Line Value: [Empty]
- Gross Weight: [Empty]
- Net Weight: [Empty]
- Commodity: HTSUS 3808912501
- Commodity Add Digit: [Empty]
- Ruling Number: [Empty]
- Classification Status: [Empty]
- Country of Origin: [Empty]
- Classified By: TFPO

Buttons at the bottom: Create, Close.

To update an existing item record on the *Product Master* page, select the record and click *Update Classification*. This is available for all Purchase Orders, regardless of how they were created.

The *Classification Worksheet* window displays.

Fig. 3.23

Classification Worksheet

The 'Classification Worksheet - Product: MOS-SPR' window displays the following information:

- Importing Country: US - UNITED STATES
- Country Override: [Empty]
- Compliance Hold: [Empty]
- Review/Approval: [Empty]
- Commercial Description: Mosquito Spray
- Customs Description: Repellants for insects such as flies, mosquito. For adults with [Empty]
- Supporting Comments: [Empty]
- Simple View (selected) / Advanced View
- Product Details:
 - Admissibility Flags: [Empty]
 - Similar Product Search: [Empty]
 - Commodity Code: 3808.91.2501
 - GRI Basis: [Empty]
 - Ruling: [Empty]
 - Legal Opinion: [Empty]
 - Country of Origin: [Empty]
 - Classification Status: [Empty]
- Secondary Codes:
 - Add Secondary Code: [Empty]
 - Commodity Code: [Empty]
 - Description: [Empty]
- External Links:
 - [HTSUS Search](#)
 - [CROSS](#)
 - [Google](#)
 - [ScheduleB search](#)
 - [CBP AD/CVD](#)
 - [FDA Code Builder](#)
 - [FDA Device & Establishment](#)
 - [Singapore Tariff Schedule](#)
 - [Integration Point](#)
- Attachments:
 - Attach document: [Empty]

Buttons at the bottom: Save, Save for later, Reset, Close.

Note Any edits made in this window are applied universally to the relevant products.

After you make the necessary edits, click *Save*. This prompts the *Product Classification Summary* window, in which you can review and confirm the inputted information. Click *Continue* to proceed with the changes.

Fig. 3.24

Product Classification Summary Window



The screenshot shows a window titled "Product Classification Summary". It contains the following information:

- Product Code:** PRODLI013
- Importing Country: US - UNITED STATES
- Commercial Description: Bicycle 24 EXF4
- Customs Description: hjj
- Supporting Comments:

HTSUS: undefined
GRI Basis:
Supporting Ruling:

Classified By: QCONFIG **Classified Date:** 2021/03/16

At the bottom, there are two buttons: "Continue" (with a green arrow icon) and "Cancel" (with a red X icon).

View Payments

Payment messages can be sent to indicate that the payment was received for a particular line. This information is accessible in the *Line Details* task window.

Note Payment messages cannot be manually added.

Fig. 3.25

Payment Symbols

Purchase Unit Value	Purchase Line Value		Order Line
0.01 EUR	100.7 EUR	✓	10
51.7 EUR	103.4 EUR	✓	10
0.5 EUR	0.5 EUR	✓	10
0.9 EUR	90 EUR	—	10
0.9 EUR	90 EUR	+	10
0.5 EUR	0.5 EUR	—	10

The table below describes the payment symbols that can be found in the *Line Details* grid.

Table 3.2

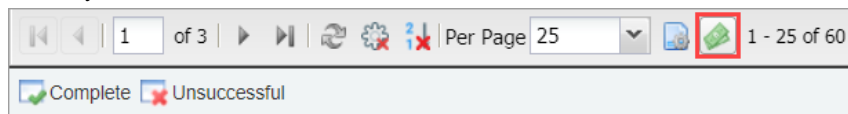
Payment Symbols

Payment Symbol	Description
	Underpaid. The payment received is less than the purchase line value.
	Overpaid. The payment received is more than the purchase line value.
	Paid. The payment received equals the purchase line value.

To view line payment details, select a record in the grid and click the *View Payments* button in the toolbar.

Fig. 3.26

View Payments Button, Line Details Toolbar



The *Payments for ITEM* window displays.

Fig. 3.27

View Payments Window

Payments for ITEM: 50 / PROD_HIW_05				
Payment Reference	Invoice Number	Invoice Line Number	Payment Quantity	Payment Value
PAYREF000002	INV002	40	3 EA	100 EUR

In the example above, a payment message with a Payment Value of 100 EUR was received. The specified line has a Purchase Line Value of 90 EUR. Therefore, the *Overpaid* symbol displays to indicate that an overpayment occurred.

Fig. 3.28

Overpaid Symbol in Purchase Line Value Column

Purchase Unit Value	Purchase Line Value		Order Line
0.01 EUR	100.7 EUR		10
51.7 EUR	103.4 EUR		10
0.5 EUR	0.5 EUR		10
0.9 EUR	90 EUR		10
0.9 EUR	90 EUR		10
0.5 EUR	0.5 EUR		10

Note If multiple payment messages are received, the total sum of these messages is used.

Supplier Status Tracker

Purchase order supplier details can also be updated on the *Line Details* task.

Click the *Edit*  button in the *Supplier Details* panel to access the *Supplier Status Tracker* window. Apply the necessary edits and click *Save*.

Fig. 3.29

Supplier Details Panel, Line Details Window

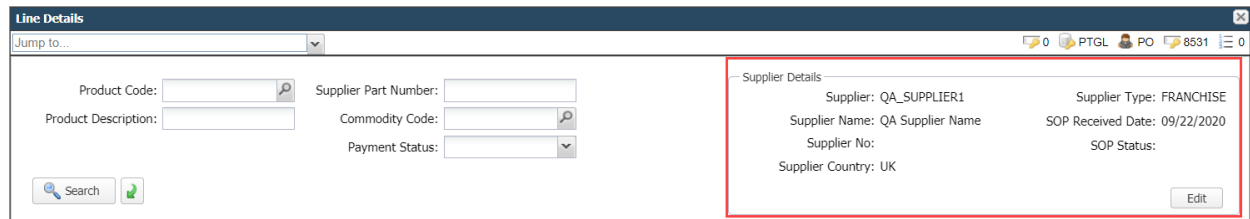
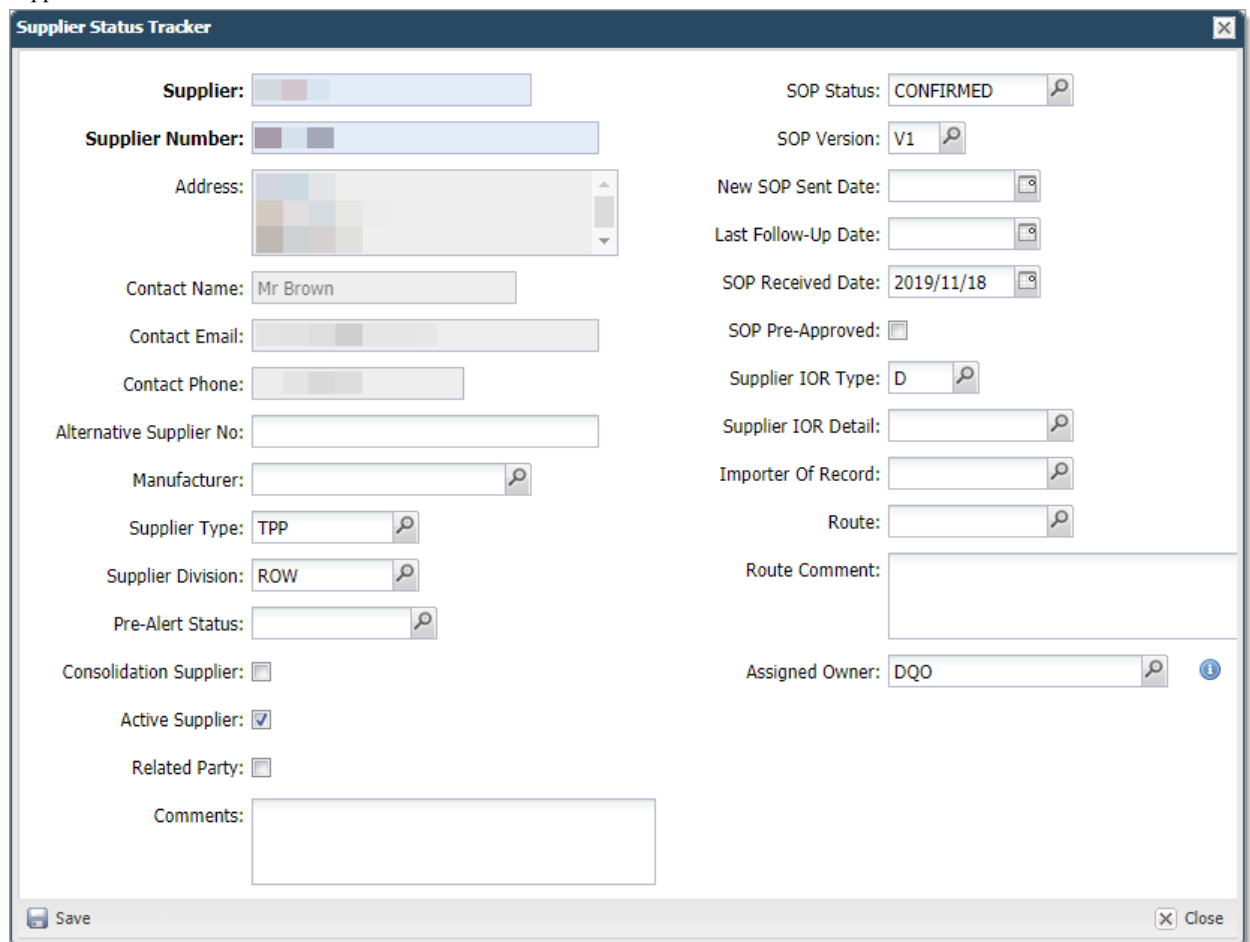


Fig. 3.30

Supplier Status Tracker Window



Admissibility Flags

Admissibility Flags add visualization and highlight requirements for applicable Partner Government Agencies (PGAs) and Additional Duties (Duty Add) for the product or articles in question.

As well as maintaining them in the Product Master, you can also add admissibility flags to your purchase order through the *Admissibility Flags* Workflow task. To access the *Admissibility Flags* window, double-click the *Admissibility Flags* task in the *Tasks* panel.

Fig. 3.31

Admissibility Flags Task

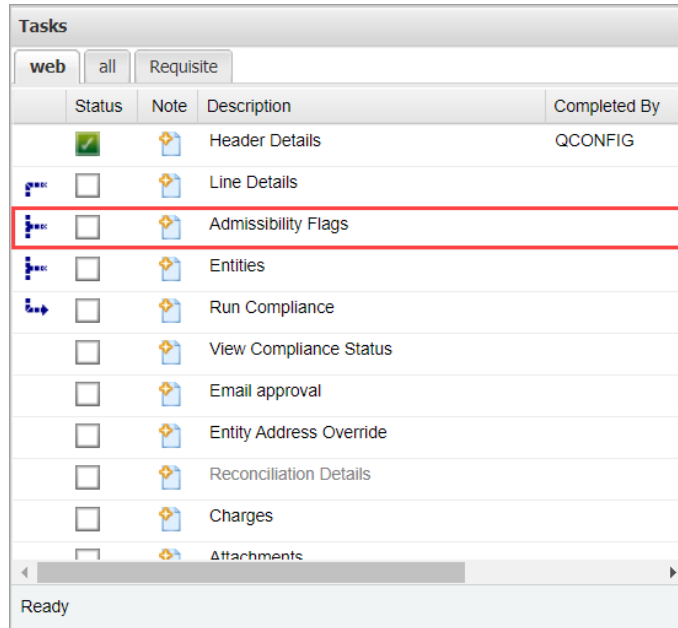
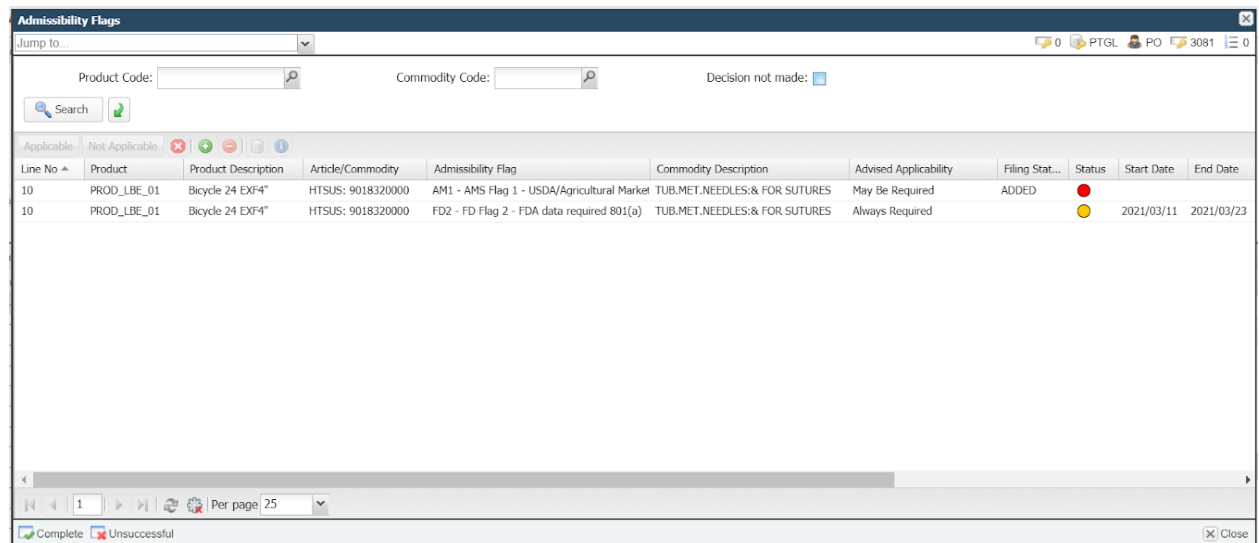


Fig. 3.32

Admissibility Flags Window

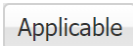
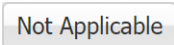


The search panel at the top of the window enables you to filter results in the grid below. Use the *Decision not made* field to apply a filter that only displays flags on which a decision has not yet been made.

The buttons above the grid are described in the table below.

Table 3.3

Admissibility Flags Grid Buttons

Button	Description
	Applicable. Only for automatically added flags.
	Not Applicable. Only for automatically added flags.
	Cancel Applicable Decision. Only for automatically added flags (after designating Applicable or Not Applicable).
	Add Admissibility Flag. Only for manually added flags.
	Delete Admissibility Flag. Only for manually added flags (after using Add Admissibility Flag).
	Show Commodity Flag Determination Data. For both automatically and manually added flags.
	Show Additional Information. For both automatically and manually added flags.

Note Values with decimal points in the *Line No.* column indicate the article sequence number for the product. No decimal point indicates that there are no related articles.

Fig. 3.33

Decimal Points in Line No. Column

Line No. ▲
1.1
1.1
1.2
1.2

Select a record in the grid and click the *Show Commodity Flag Determination Data*  button to learn why a particular flag was applied automatically. The *Trade Measure Flag Determination Data* window displays. Double-click a record in this window to view more flag information.

Fig. 3.34

Trade Measure Flag Determination Data Window

Trade Measure Flag Determination Data - PGA Flag: AM7										
Na...	Measure Ty...	Content Ty...	Commodity ...	Start Date	End Da...	Origin country group ▼	Destination country group	Descripti...	Reason	Not
AM7	AFAM7	BASE	0102210010			OMNES	US		BASE	

Fig. 3.35
Trade Measure Flag Determination Data, More Information

Trade Measure Flag Determination Data - PGA Flag: AM7

Na...	Measure Ty...	Content Ty...	Reason	Not
AM7	AFAM7	BASE	BASE	

Measure Type: AFAM7

Commodity ID: 0102210010

Origin country group: OMNES

Destination country group: US

Legal Bases:

Content Type: BASE

Description:

Reason: BASE

Note:

Start Date:

End Date:

Close

For more information on flag colors and working with manually and automatically added flags, see the *Customs Details* section.

Entities

Entities can be added to the workflow using the *Entities* task. To access the *Entities* window, double-click it in the *Tasks* panel.

Fig. 3.36
Entities Task

Status	Note	Description	Completed By
		Header Details	QCONFIG
		Line Details	
		Admissibility Flags	
		Entities	
		Run Compliance	
		View Compliance Status	
		Email approval	
		Entity Address Override	
		Reconciliation Details	
		Charges	
		Attachments	

Ready



Fig. 3.37
Entities Window

The screenshot shows a window titled "Entities" with a search bar at the top. Below the search bar, there are several fields with labels and values, each with a magnifying glass icon for search. The fields are: Importer Of Record (17_FRANCE), Ultimate Consignee (UC002), Importing Carrier (empty), Freight Forwarder (empty), Broker (empty), Booking Party (empty), Consolidator (empty), Stuffing Location (empty), FTZ Operator (empty), Shipper (empty), Seller (QA_SUPPLIER1), Manufacturer (empty), Consignee (CN001), Buyer (empty), and Shipping Officer (empty). At the bottom, there are buttons for Save, Complete, and Unsuccessful, and a link for Configuration Information.

In this window, you can add entities to the workflow. Some fields are already populated with values, depending on the information in the purchase order header.

Run Compliance

You can automatically perform a compliance check using the *Run Compliance* Workflow task. To begin a check, select a record in the transaction grid and double-click the *Run Compliance* task.

Fig. 3.38
Run Compliance Task

The screenshot shows a window titled "Tasks" with tabs for web, all, and Requisite. Below the tabs is a table with columns: Status, Note, Description, and Completed By. The table lists several tasks, with the "Run Compliance" task highlighted by a red border.

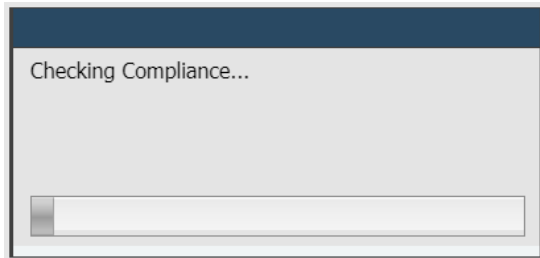
Status	Note	Description	Completed By
		Header Details	QCONFIG
		Line Details	
		Admissibility Flags	
		Entities	
		Run Compliance	
		View Compliance Status	
		Email approval	
		Entity Address Override	
		Reconciliation Details	
		Charges	
		Attachments	



The *Checking Compliance* window displays. When the process is complete, a green check  displays beside the *Run Compliance* task.

Fig. 3.39

Run Compliance



View Compliance Status/Compliance Status

After you run a compliance check, you can then review the results using the *View Compliance Status* task. Double-click the task in the *Tasks* panel of the Workflow page.

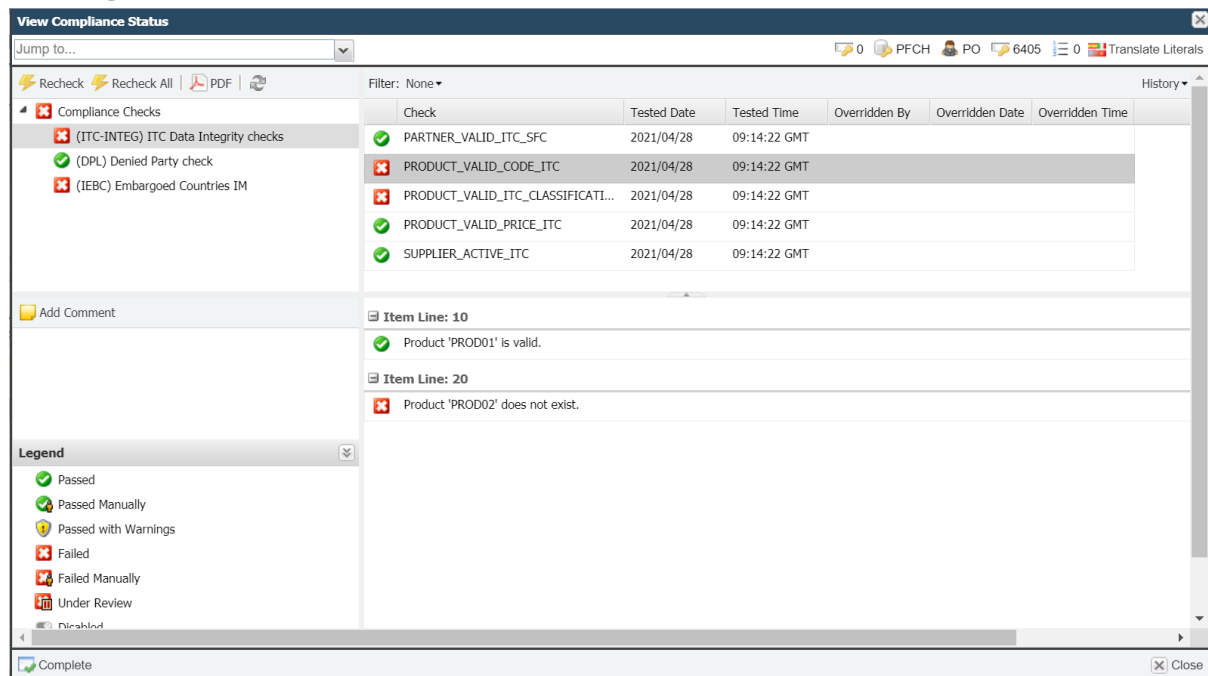
Fig. 3.40

View Compliance Status Task

Tasks				
weballRequisite				
	Status	Note	Description	Completed By
			Header Details	QCONFIG
	☐		Line Details	
	☐		Admissibility Flags	
	☐		Entities	
	☐		Run Compliance	
	☐		View Compliance Status	
	☐		Email approval	
	☐		Entity Address Override	
	☐		Reconciliation Details	
	☐		Charges	
	☐		Attachments	
Ready				

Fig. 3.41

View Compliance Status Window



The (ITC-INTEG) Data Integrity compliance check option is used to indicate the Purchase Order details match set parameters. For example, it indicates if a product does not have a valid product code, or that the price of the product is/is not valid.

For more information on this window, see Chapter 4 *Compliance Results* in the *Trade Compliance User Guide*.

Entity Override Address

Using the *Entity Address Override* task, you can add entities associated with your purchase order and modify their details. To access this feature, double-click the *Entity Address Override* task in the *Workflow Tasks* panel.

Fig. 3.42

Entity Address Override Task

Tasks				
weballRequisite				
	Status	Note	Description	Completed By
			Header Details	QCONFIG
			Line Details	
			Admissibility Flags	
			Entities	
			Run Compliance	
			View Compliance Status	
			Email approval	
			Entity Address Override	
			Reconciliation Details	
			Charges	
			Attachments	
Ready				

Fig. 3.43

Entity Address Override Window

Entity Address Override

Jump to...

0 PTGL PO 3081 0

Party Type:

Partner Name:

Address Line 1:

Party:

Contact:

Country:

Search

13 - Financial

Company ABC

Mr Jones

Long Road

PARIS, 00303

FR

Party Type:

Partner Name:

Contact:

Contact Title:

Address Line 1:

Address Line 2:

Address Line 3:

Address Line 4:

Address Line 5:

City:

Postal Code:

County:

State:

Country:

Phone Number:

Phone Extension:

Email:

Fax Number:

Partner EIN:

Complete

Unsuccessful

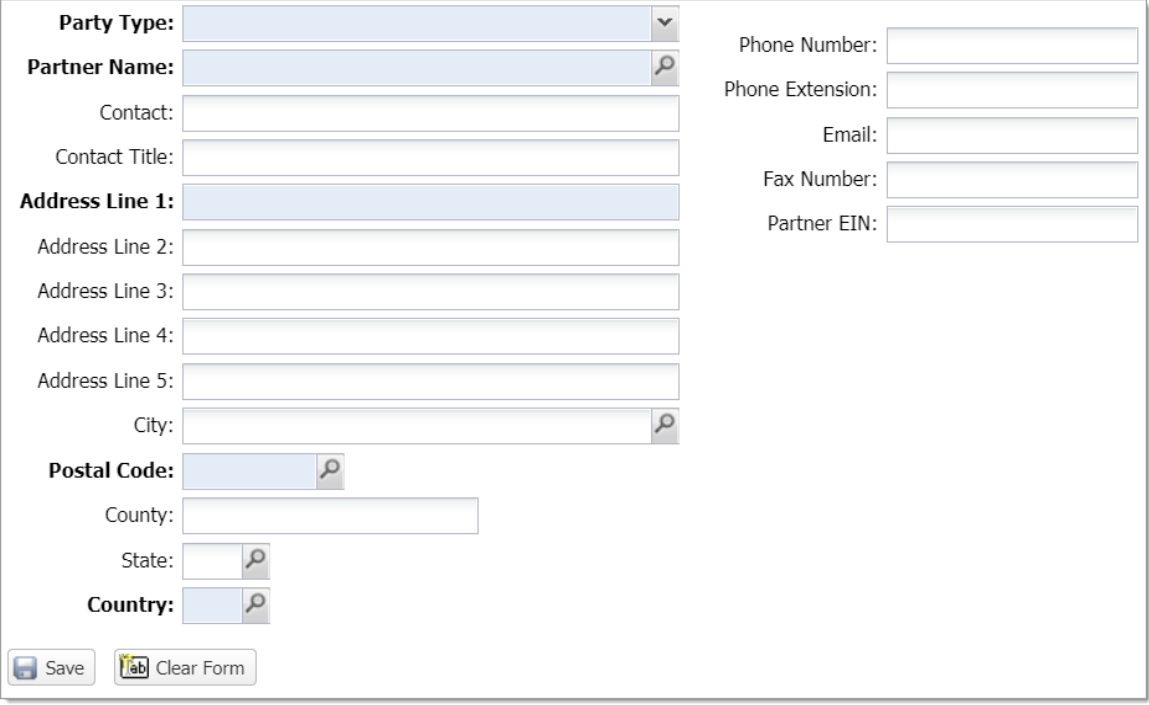
Close

The panel on the left displays entities that are already added to the product.

To add an entity, click the *Add Entity*  button in the toolbar. You can then input the details of the entity in the panel on the right. Then click *Save*.

Fig. 3.44

Add Entity Fields, Entity Address Override Window



The form is titled "Add Entity Fields, Entity Address Override Window". It contains the following fields and controls:

- Party Type:** A dropdown menu.
- Partner Name:** A text input field with a search icon.
- Contact:** A text input field.
- Contact Title:** A text input field.
- Address Line 1:** A text input field.
- Address Line 2:** A text input field.
- Address Line 3:** A text input field.
- Address Line 4:** A text input field.
- Address Line 5:** A text input field.
- City:** A text input field with a search icon.
- Postal Code:** A text input field with a search icon.
- County:** A text input field.
- State:** A dropdown menu with a search icon.
- Country:** A dropdown menu with a search icon.
- Phone Number:** A text input field.
- Phone Extension:** A text input field.
- Email:** A text input field.
- Fax Number:** A text input field.
- Partner EIN:** A text input field.
- Buttons:** "Save" and "Clear Form" buttons at the bottom left.

Click *Complete* to save all changes and close the window. A green check  is then displayed beside the *Entity Address Override* task to indicate that it was successfully completed.

Click *Unsuccessful* to save and close the window. A red X  appears beside the task to indicate that it was not completed successfully.

Click *Close* to close the window without saving updates.

Reconciliation Details

The *Reconciliation Details* task enables you to reconcile products, based on the total amount ordered versus the amount received. Double-click the *Reconciliation Details* task to open it.

Fig. 3.45

Reconciliation Details Task

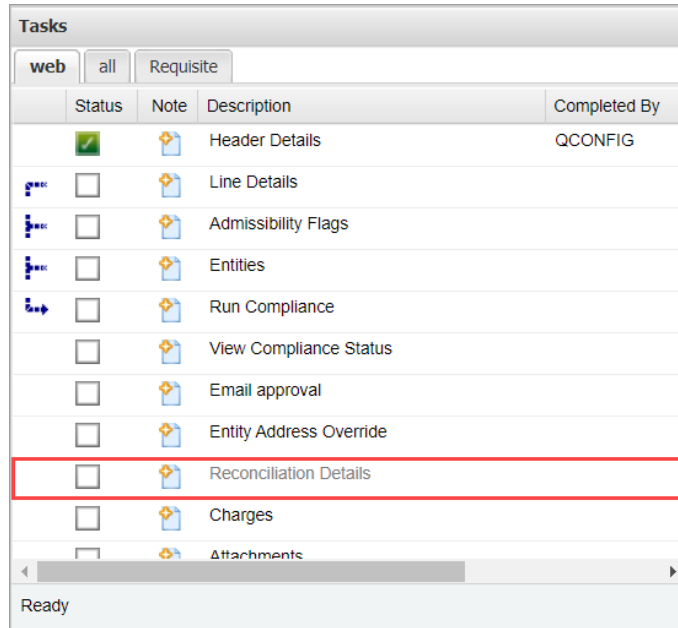
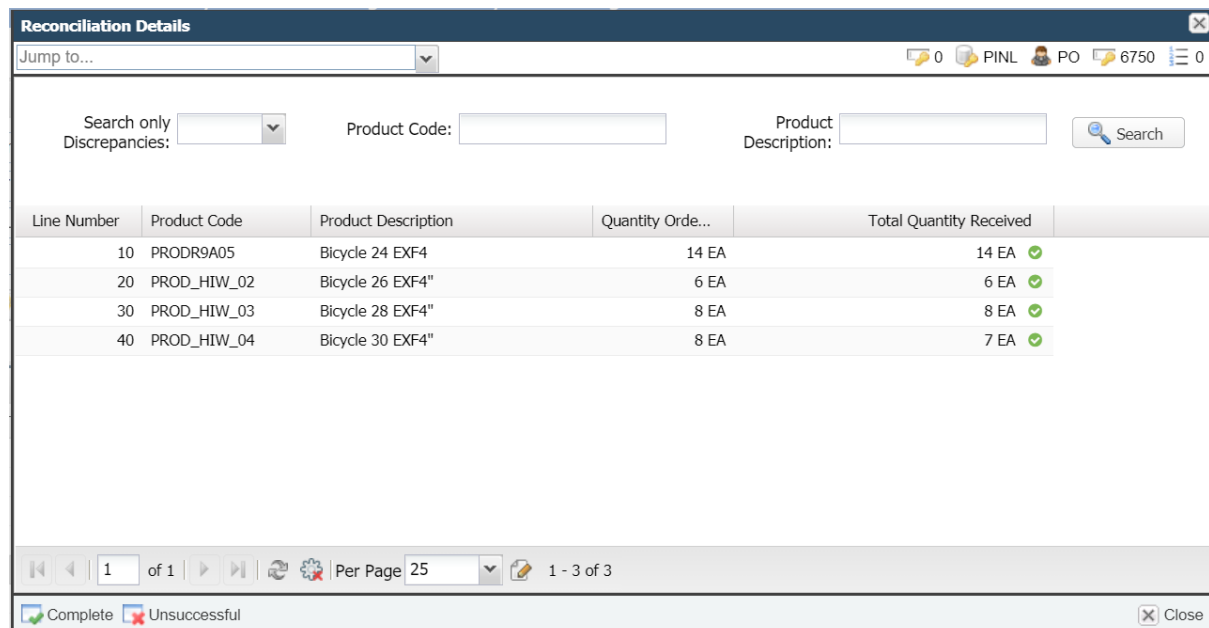


Fig. 3.46

Reconciliation Details Window



The symbols found in the *Total Quantity Received* column are described in the table below.

Table 3.4

Reconciliation Details Symbols

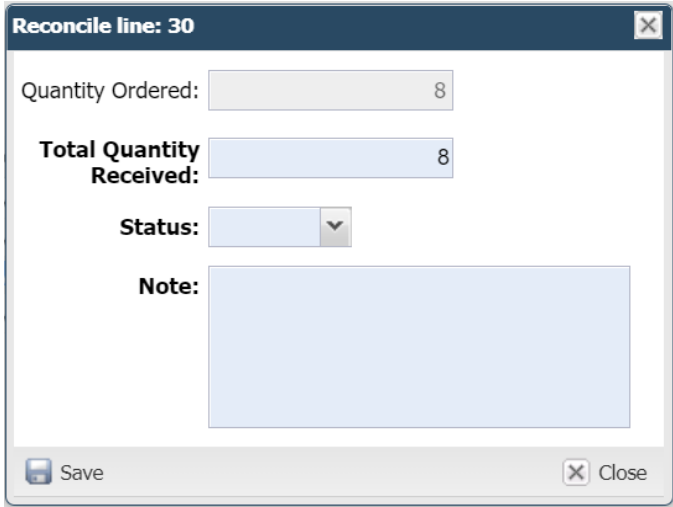
Symbol	Description
	Under. Status is set to Under.
	Over. Status is set to Over.
	Reconciled. Status is set to Reconciled.

Note A reconciliation message can update details on this task.

To manually reconcile lines, select a record and click the *Update Line*  button.

Fig. 3.47

Reconciliation Line Window



The screenshot shows a window titled "Reconcile line: 30". It contains the following fields:

- Quantity Ordered:** A text box with the value "8".
- Total Quantity Received:** A text box with the value "8".
- Status:** A drop-down menu with a downward arrow.
- Note:** A large text area.

At the bottom of the window, there are two buttons: "Save" (with a floppy disk icon) and "Close" (with an 'X' icon).

Input the quantity received in the *Total Quantity Received* field. You can insert a value that is over the *Quantity Ordered* value and set the *Status* value to *Under*.

The symbol displayed in the *Line Details* window depends on the value in the *Status* drop-down field..

Click *Save* to reconcile the line and close the window. The symbol displayed in the *Total Quantity Received* column for this line may change as a result of the update.

Click *Complete* to save all changes and close the window. A green check  is then displayed beside the *Reconciliation Details* task to indicate that it was successfully completed.

Click *Unsuccessful* to save and close the window. A red X  appears beside the task to indicate that it was not completed successfully.

Click *Close* to close the window without saving updates.

References

The *References* task is used to add additional ad hoc elements to your purchase order. To access this feature, double-click the *References* task in the Workflow *Tasks* panel.

Fig. 3.48

References Task

The screenshot shows a 'Tasks' panel with a tabbed interface. The 'web' tab is selected, showing a list of tasks. The 'References' task is highlighted with a red rectangle. The tasks listed are:

Status	Note	Description	Completed By
☐		View Compliance Status	
☐		Email approval	
☐		Entity Address Override	
☐		Reconciliation Details	
☐		Charges	
☐		Attachments	
☐		References	
☐		Route Details	
☐		Container Information	
☐		Documents	
☐		Errors	

Ready

Fig. 3.49

References Window

The screenshot shows the 'References' window with a 'Jump to...' dropdown and a status bar at the bottom. The status bar includes 'Save', 'Complete', 'Unsuccessful', and 'Close' buttons. The window contains the following fields:

Invoice Number:	Invoice Date:	
PO Number:		
BOL Number:	House Airwaybill Number:	
Entry Number:	Entry Date:	Resend Date:
Export Date:	Summary Date:	Import Date:
Estimated Departure Date:		Estimated Arrival Date:
Consignee No.:	Importer No.:	
Reference No.:		
I.T. No.:	I.T. Date:	

All fields in this window are optional. Some may populate automatically, depending on the header details.

Click *Save* to save all changes and keep the *References* window open.

Click *Complete* to save all changes and close the window. A green check  is then displayed beside the *References* task to indicate that it was successfully completed.

Click *Unsuccessful* to save and close the window. A red X  appears beside the task to indicate that it was not completed successfully.

Click *Close* to close the window without saving updates.

Charges

You can view charges and payments that apply to a purchase order through the *Charges* task. To access this feature, double-click the *Charges* task in the Workflow *Tasks* panel.

Fig. 3.50

Charges Task

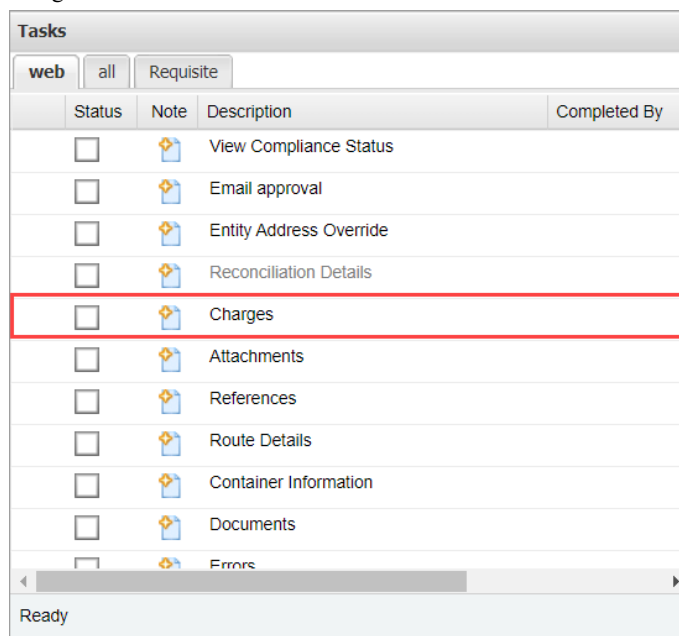


Fig. 3.51

Charges Window

The records displayed in the *Charges* grid are retrieved from the payment messages in the *Line Details* task. To view charges associated with a line, click the *View Payments*  button.

Click *Complete* to save all changes and close the window. A green check  is then displayed beside the *Charges* task to indicate that it was successfully completed.

Click *Unsuccessful* to save and close the window. A red X  appears beside the task to indicate that it was not completed successfully.

Click *Close* to close the window without saving updates.

Container Information

You can view and add information related to containers and packing through the *Container Information* task. To access it, double-click the *Container Information* task in the *Tasks* panel.

Fig. 3.52
Container Information Task

Tasks				
web all Requisite				
Status	Note	Description	Completed By	
☐		View Compliance Status		
☐		Email approval		
☐		Entity Address Override		
☐		Reconciliation Details		
☐		Charges		
☐		Attachments		
☐		References		
☐		Route Details		
☐		Container Information		
☐		Documents		
☐		Errors		

Ready

Fig. 3.53
Container Information

Container Information

Jump to: [dropdown]

Sequence No: [input] Registration number: [dropdown] [input] [Search]

Packing - Containers

Seq No	Reg number	Seal number	Asset id	Nationality	Asset type	User defined 2	User defined 1	User defined 3	Include in Fre
No records found.									

Page 1 of 1

Complete Unsuccessful

No records to display

Close

To add a new record, click the *Create*  button in the toolbar.

Fig. 3.54

Packing - Containers [Create] Window

The screenshot shows a software window titled "Packing - Containers [Create]". It contains the following fields and controls:

- Client: ETGL
- Consignor: QCTRY-HL
- Reference: 7210
- Despatch number: 0
- Sequence No: 20
- Include in Freight Calculations: ☒
- Asset id: [text box with search icon]
- Nationality: [text box with search icon]
- Asset type: [text box with search icon]
- Registration number: [blue highlighted text box]
- Seal number: [blue highlighted text box]
- User defined 1: [text box]
- User defined 2: [text box]
- User defined 3: ☐

At the bottom of the window, there is a "Create" button with a green plus icon and a "Close" button with a red X icon.

Fields highlighted in blue are mandatory. It is not possible to edit the *Client*, *Consignor*, *Reference*, *Despatch Number* or *Sequence No* field values.

Click *Create* to save the new record, or *Close* to discard it.

Click *Complete* to save all changes and close the window. A green check  is then displayed beside the *Container Information* task to indicate that it was successfully completed.

Click *Unsuccessful* to save and close the window. A red X  appears beside the task to indicate that it was not completed successfully.

Click *Close* to close the window without saving updates.

Attachments

You can manually add documents to your purchase order workflow using the *Attachments* task. To begin, double-click the *Attachments* task in the *Tasks* panel.

Fig. 3.55

Attachments Task

Tasks

web	all	Requisite	
Status	Note	Description	Completed By
☐		View Compliance Status	
☐		Email approval	
☐		Entity Address Override	
☐		Reconciliation Details	
☐		Charges	
☐		Attachments	
☐		References	
☐		Route Details	
☐		Container Information	
☐		Documents	
☐		Errors	

Ready

Fig. 3.56

Attachments Window

Attachments

Jump to...

0

PFCH

PO

2603

0

File Name	Created Date	Last Modified Date	Description

0

Per Page

25

Download

Drop a file here

Complete

Unsuccessful

Close

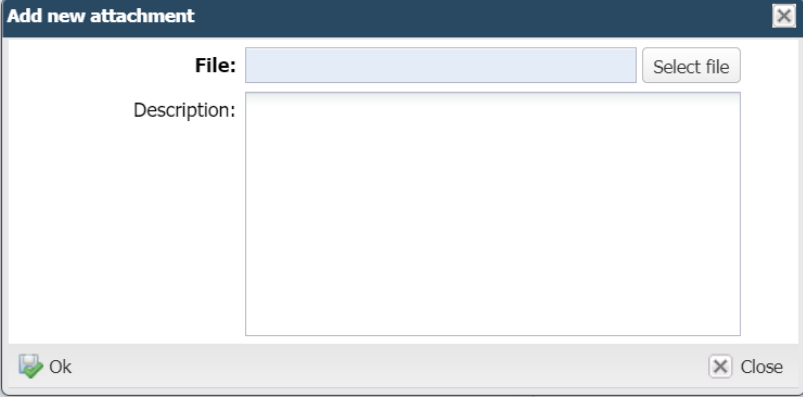
There are two ways to add documents:

- Click the *Add new attachment*  button in the toolbar
- Drag and drop a file into the *Drop a file here* area

Both methods prompt the *Add New Attachment* pop-up window.

Fig. 3.57

Add New Attachment Pop-up Window



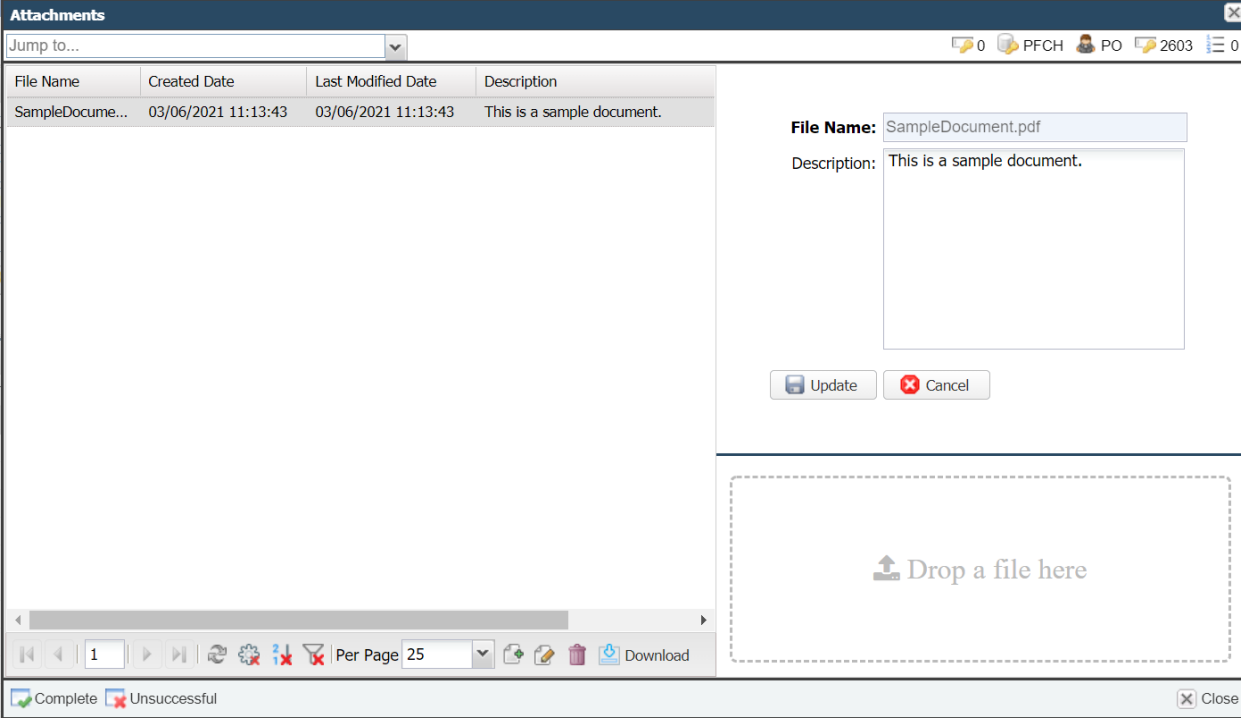
The 'Add new attachment' window has a title bar with a close button. It contains a 'File:' label next to a text input field, with a 'Select file' button to its right. Below this is a 'Description:' label next to a larger text area. At the bottom, there are 'Ok' and 'Close' buttons.

If you did not use the drag and drop method, click *Select file* to choose a file on your computer. Add a description for the attachment in the *Description* field. Then click *Ok*. A new record is now present in the *Attachments* grid.

Existing records can be edited by selecting one in the grid and updating the details in the panel to the right. Click *Update* to save the changes.

Fig. 3.58

Edit Attachment, Attachments Window



The 'Attachments' window has a title bar with a close button. Below the title bar is a 'Jump to...' dropdown. The main area is divided into two sections. The left section contains a table with columns: File Name, Created Date, Last Modified Date, and Description. The right section contains a 'File Name:' label with a text input field, a 'Description:' label with a text area, and 'Update' and 'Cancel' buttons. At the bottom right, there is a dashed box with an upload icon and the text 'Drop a file here'. The bottom of the window features a toolbar with various icons, including a 'Download' button, and a status bar with 'Complete' and 'Unsuccessful' indicators.

File Name	Created Date	Last Modified Date	Description
SampleDocume...	03/06/2021 11:13:43	03/06/2021 11:13:43	This is a sample document.

You have the option of deleting attachments using the *Delete*  button in the toolbar.

You can also download attachments by selecting a record and clicking the *Download*  **Download** button.

Click *Complete* to save all changes and close the window. A green check  is then displayed beside the *Attachments* task to indicate that it was successfully completed.

Click *Unsuccessful* to save and close the window. A red X  appears beside the task to indicate that it was not completed successfully.

Click *Close* to close the window without saving updates.

Errors

Using the *Errors* task, you can review any errors related to the purchase order that were detected. These errors are added automatically as a result of interaction with other tasks. Double-click the *Errors* task to access the *Errors* window.

Fig. 3.59

Errors Task

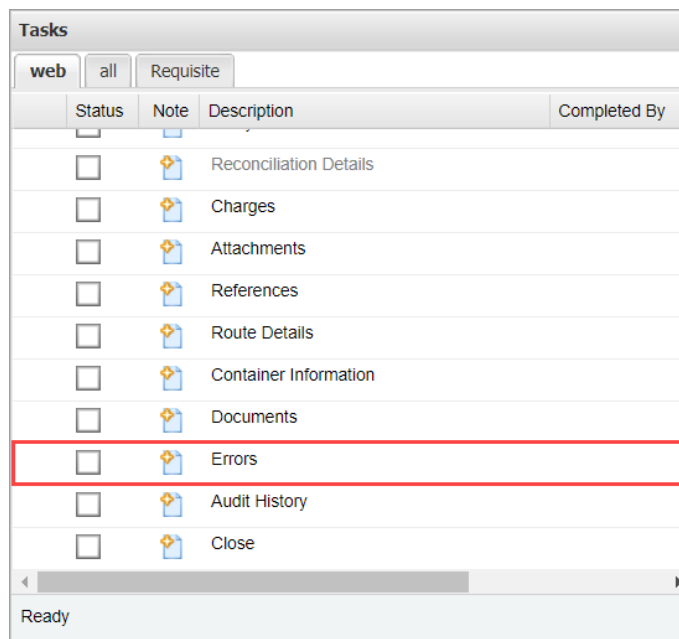
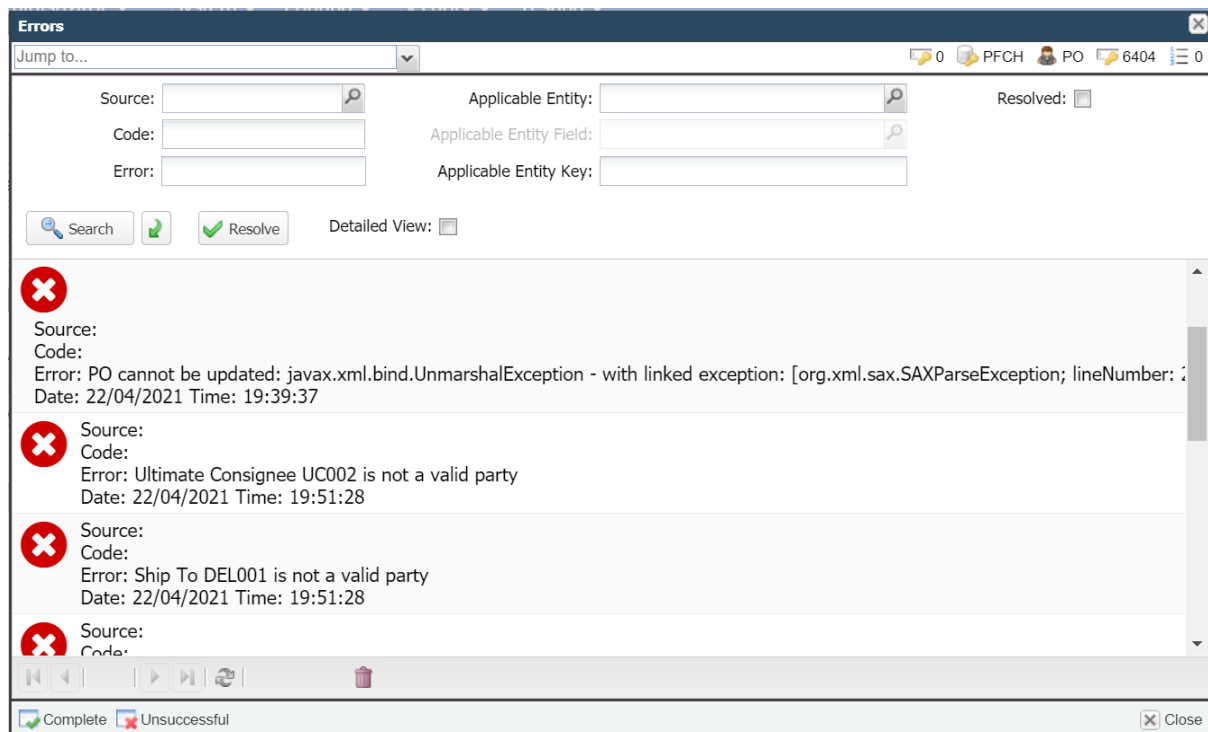


Fig. 3.60

Errors Window



There are two types of errors:

- XSD Error
- Parameter Error

XSD Error

An XSD error is visible in the first row of the example above. This can occur due to an unpopulated mandatory field or the use of invalid characters. When an XSD Error occurs on a purchase order Create message, the purchase order is assigned to the ERROR user. When an XSD Error occurs on a purchase order Update message, the purchase order stays assigned to the original user.

Parameter Error

A parameter error occurs when a record is listed but does not match existing data in the system. The remaining two items in the example above are parameter errors. An example of a parameter error is an invalid consignee.

If a purchase order only has parameter errors, it is not assigned to the ERROR user. Instead, it is assigned to a specific user based on rule configuration.

Resolving and Deleting Errors

To resolve an error and remove it from the list, select a record and click the *Resolve*  button. This also marks an error as resolved in the database. You can locate a resolved error again by enabling the *Resolved* field in the search panel



Note Enable the *Detailed View* field in the search panel to view more information related to errors.

To delete an error, select a record in the *Errors* grid and click the *Delete*  button in the toolbar.

Note Deleting an error removes it from the database. However, this is not the same as resolving the error.

Click *Complete* to save all changes and close the window. A green check  is then displayed beside the *Errors* task to indicate that it was successfully completed.

Click *Unsuccessful* to save and close the window. A red X  appears beside the task to indicate that it was not completed successfully.

Click *Close* to close the window without saving updates.

Audit History

The Audit History feature records any changes that are made to the workflow. To access the *Audit History* window, double-click the *Audit History* task.

Fig. 3.61

Audit History Task

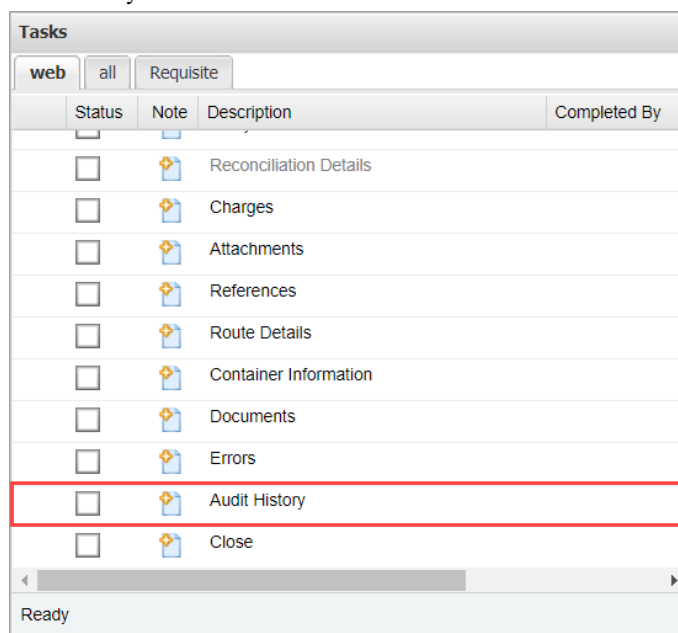


Fig. 3.62

Audit History Window

Audit History

Jump to...

Entities

Shipment status: UPDATED

New address line 1 was created: 13 / Company ABC.

QCONFIG (Configuration User - All Roles) 2021/03/17 11:47:47 UTC+0

Admissibility Flag

Shipment status: UPDATED

10 - PROD_LBE_01
AM1 - PGA Flag Added
HTSUS: 9018320000

AMS Flag 1 - USDA/Agricultural Marketing Service Data related to egg products may be required

QCONFIG (Configuration User - All Roles) 2021/03/17 11:32:39 UTC+0

Partners

Shipment status: UPDATED

QA_SUPPLIER1 Supplier SOP was updated.
Sop Received Date changed from null to 2019-11-18.
Supplier Type changed from EMPTY to TPP.
Sop Status changed from EMPTY to CONFIRMED.

1 of 1 Per page 25 1 - 7 of 7

Close

This task is read-only and cannot be marked as Complete or Unsuccessful.

Close

The *Close* task changes a record's status from Open to Closed. Marking a purchase order as Closed indicates that it is complete and has been processed.

Fig. 3.63

Close Task

Tasks

web all Requisite

Status	Note	Description	Completed By
☐		Reconciliation Details	
☐		Charges	
☐		Attachments	
☐		References	
☐		Route Details	
☐		Container Information	
☐		Documents	
☐		Errors	
☐		Audit History	
☐		Close	

Ready

If you need to locate a closed purchase order, select the *Closed* option in the status field on the *Workflow* page. Then click *Search*.

Fig. 3.64

Status Field, Workflow Search Panel

Purchase Order

Search

Open ▼

Open

Closed

Purchase Order ▼

QTGLUSER ▼

TGL ▼

Reference No.:

Search

To reopen a closed purchase order, select a record in the transactions grid and click the *Open Transaction* button in the toolbar.

Fig. 3.65

Open Transaction Button, Workflow Toolbar

Page 1 of 5

Select All

Create

Open Transaction

Import Shipment Workflow

In the Workflow Portal, you can create, edit, and update import shipments.

Select *Import Shipment* from the transaction type drop-down list on the *Workflow* page. Alternatively, select *Import Shipment* in the *Entry* drop-down list in the top horizontal menu.

Fig. 3.66

Transaction Type Field, Import Shipment Selected

Open ▼

Import Shipment ▼

Group: Import Shipment

Client: Shipment

Reference No.: Consignee Consoli...

Load

Purchase Order

Search

Create Entry Header

To create a new import shipment, click the *Create* button in the transaction panel toolbar.

Fig. 3.67

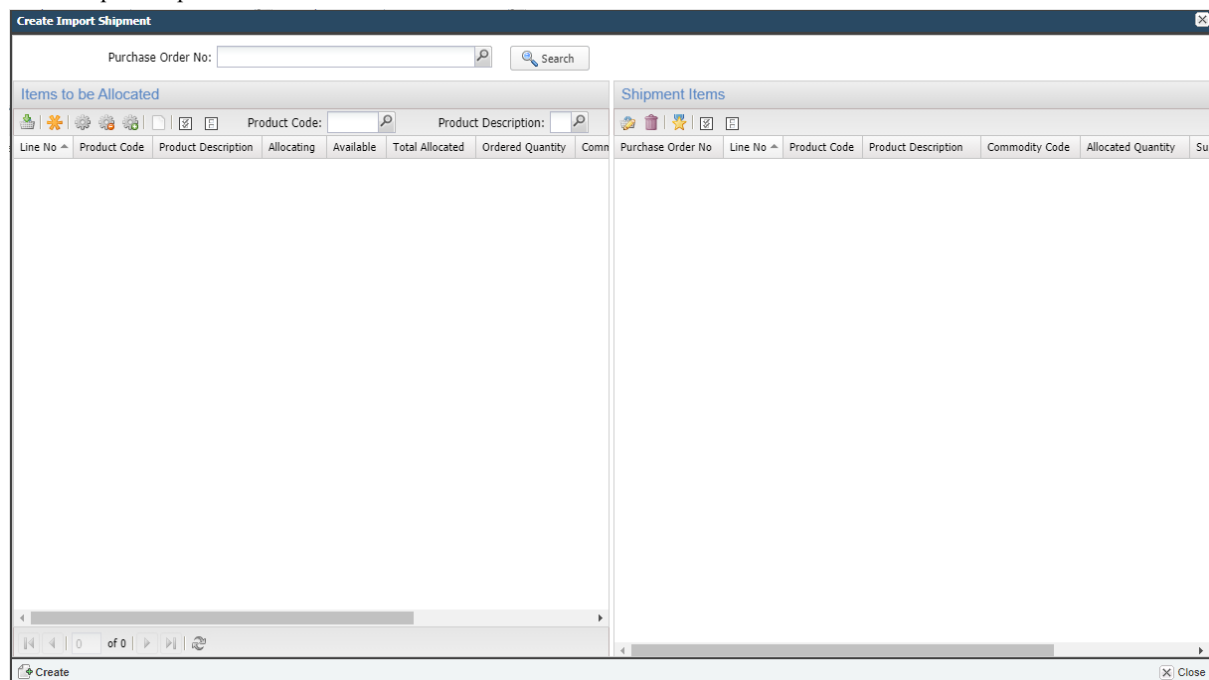
Create Button, Workflow Page



The *Create Import Shipment* window displays.

Fig. 3.68

Create Import Shipment Window



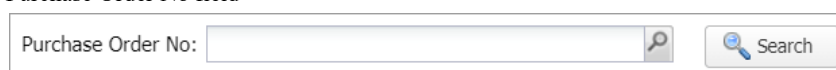
This window is divided into two panels; *Items to be Allocated* and *Shipment Items*.

The columns in the *Items to be Allocated* panel match the columns in the *Line Details* task related to the Purchase Order Workflow. These can then be selected and brought over to the *Shipment Items* panel.

Click the lookup icon on the *Purchase Order No* field at the top of the window to select purchase orders from the purchase order workflow.

Fig. 3.69

Purchase Order No field



The *Purchase Order No* window displays. This displays all purchase orders that were created from your group and client.

Fig. 3.70

Purchase Order No Window

Purchase Order No	External Reference	Reference	Exporting Coun...	Order Date
100159	100159_20210414	2388	US	2021-04-19
100160	100160_20210414	2389	US	2021-04-19
100161	100161_20210414	2391	US	2021-04-19
100162	100162_20210414	2392	US	2021-04-19

Select a record and then click the *Search* button beside the *Purchase Order No* field. The *Items to be Allocated* panel now displays all purchase order lines from the selected purchase order.

Fig. 3.71

Items to be Allocated Panel Populated with Purchase Order Lines

Line No	Product Code	Product Description	Allocating	Available	Total Allocated	Ordered Quantity	Commo
10	SOME PRO...	Was soll hier sein	0 EA	9 EA	1 EA	10 EA	392
20	FOOD2	Biscuits	0 EA	19 EA	6 EA	25 EA	110
30	DEUTCHE...	Wieso wird es nic...	0 EA	59 EA	11 EA	70 EA	010
40	FOOD4	Chocolate	0 EA	100 EA	0 EA	100 EA	180
50	FOOD5	Strawberry Jam	0 EA	240 EA	0 EA	240 EA	200
60	FOOD6	Orange Juice	0 EA	30 EA	10 EA	40 EA	200
70	FOOD7	Lemon Soft Drink	0 EA	39 EA	1 EA	40 EA	010
80	007 BOND J...	Es ist bescheuert	0 EA	342 EA	4 EA	346 EA	392
90	FOOD9		0 EA	48 EA	2 EA	50 EA	
100	FOOD10		0 EA	61 EA	1 EA	62 EA	
110	FOOD11		0 EA	62 EA	0 EA	62 EA	
120	FOOD12		0 EA	262 EA	0 EA	262 EA	
130	FOOD13		0 EA	600 EA	0 EA	600 EA	
140	FOOD14		0 EA	600 EA	0 EA	600 EA	
150	FOOD15		0 EA	600 EA	0 EA	600 EA	
160	MAMA LIKE...	Es ist bescheuert	0 EA	397 EA	3 EA	400 EA	392
170	FOOD17		0 EA	600 EA	0 EA	600 EA	
180	FOOD18		0 EA	600 EA	0 EA	600 EA	
190	FOOD19		0 EA	600 EA	0 EA	600 EA	
200	FAHRRADW...	Geht in der Muehl...	0 EA	584 EA	16 EA	600 EA	010
210	FOOD21		0 EA	599 EA	1 EA	600 EA	
220	FOOD22		0 EA	599 EA	1 EA	600 EA	

Now you can select entire purchase orders, entire lines, and partial lines to create a shipment.

The *Allocating* column, highlighted in blue, is used to indicate the amount of a product to be selected and brought forward for the shipment. This means moving it to the *Shipment Items* panel.

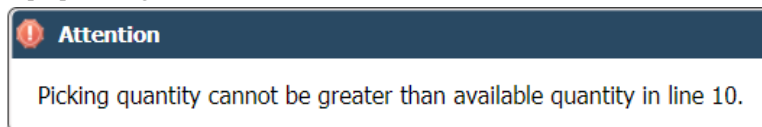
Note You can modify the quantity picked to, at most, equal the total in the *Available* column. The value in the *Available* column is the maximum that you can

You can manually set the amount of each product by inputting a value in the *Allocating* field. Lines can be transferred to the *Shipment Items* panel when the quantity picked is greater than zero.

Note The quantity picked cannot be greater than the *Available* amount.

Fig. 3.72

Pop-up Message



When lines are picked and transferred to the *Shipment Items* panel, the *Available* amount for each line in the *Items to be Allocated* panel reduces to reflect this. If saved, this reduced amount is carried over to subsequent *Import Shipment* interactions.

The tables below describe the purpose of each button in the *Create Import Shipment* window.

Table 3.5

Items to be Allocated Panel Buttons

Button	Description
	Allocate to shipment. Moves the selected line(s) picked lines to the <i>Shipment Items</i> panel when the number is greater than zero. If the quantity is zero, a pop-up message asks you to confirm whether you want to move the total <i>Available</i> quantity to <i>Shipment Items</i> .
	Append all available items to shipment. Moves all lines to the <i>Shipment Items</i> panel.
	Assign allocating quantity to available quantity. The selected line(s) picking total is set to equal the available equivalent.
	Assign allocating quantity to zero. The selected line(s) picking total is set to zero.
	Increment allocating quantity by one. The selected line(s) picking total increases in increments of one each time this is selected.
	Reset items to be picked. Removes all line(s) from <i>Items to be Allocated</i> .
	Select all items. Selects all lines in <i>Items to be Allocated</i> .
	Deselect items. Deselects all lines in <i>Items to be Allocated</i> .

Table 3.6

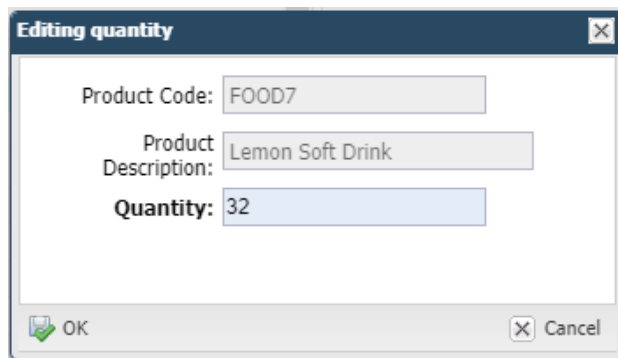
Shipment Items Panel Buttons

Button	Description
	Edit line quantity. Used to modify the selected quantity.
	Delete selected items line(s). Deletes selected line(s) from the <i>Shipment Items</i> panel and restores the <i>Available</i> quantity.
	Mark as lead PO line. Marks a line at the top level. The selected line is highlighted in blue text.
	Select all items. Selects all lines in <i>Shipment Items</i> .
	Deselect items. Deselects all lines in <i>Shipment Items</i> .

To modify picked numbers in the *Shipment Items* panel, select a line and click the *Edit Line Quantity*  button. The *Editing Quantity* window displays.

Fig. 3.73

Editing Quantity Window



It is possible to edit the *Quantity* field only in this window. The maximum allowed value is the available quantity of the product.

Note If you set the *Quantity* value to zero, the product is removed. This behaves in the same way as the *Delete Selected Items Line* button.

Click *OK* to save and close the window.

Note Although you can only work with one purchase order in the *Items to be Allocated* panel, lines from multiple different purchase orders can appear in the *Shipment Items* panel.

Click *Create* at the bottom left of the window to create a new header.

Tasks

The following sections describe the tasks that comprise an import shipment workflow.

- Header Details
- Update Import Shipment
- Items
- Admissibility Flags
- Entities
- Run Compliance
- View Compliance Status
- Entity Override Address
- Charges
- References
- Route Details
- Container Information
- Attachments
- Email Approval
- Tracking Milestones
- Errors
- Audit History

Header Details

After you create or select a header record, you can then use the *Tasks* panel to maintain it. The *Header Details* task enables you to update record details. Double-click the *Header Details* task to open it.

Fig. 3.74

Header Details Task

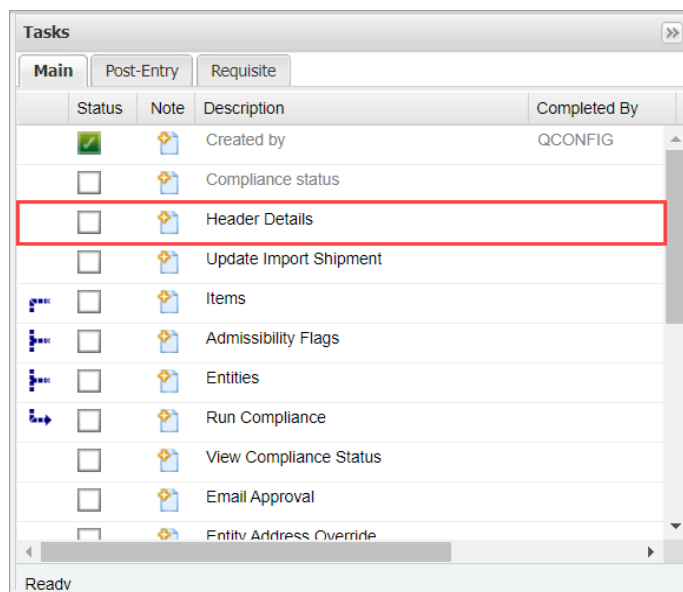


Fig. 3.75

Header Details Window

The screenshot shows the 'Header Details' window with the following fields and values:

- Filer Code / Entry No.:** (empty)
- Entry Type:** 21
- Shipment Type:** EN
- Summary Date:** 2020/05/13
- Importer of Record:** A9961
- Ultimate Consignee:** QA8801
- Surety No.:** 998
- Bond Type:** 8
- Port Code:** 0105
- Entry Date:** 2020/05/13
- Importing Carrier:** (empty)
- Transport mode:** (empty)
- Country Of Origin:** AN
- Import Date:** (empty)
- B/L or AWB No.:** 34534543
- Manufacturer ID:** 456425234
- Exporting Country:** AQ
- Export Date:** (empty)
- I.T. No.:** (empty)
- I.T. Date:** (empty)
- Missing Docs:** (empty)
- Foreign Port of Lading:** (empty)
- U.S. Port of Unlading:** (empty)
- Location of Goods/G.O. No.:** FRM_US_A004
- Consignee No.:** 6546
- Importer No.:** 456546
- Reference No.:** 657657657
- Declarant name:** (empty)
- Title:** (empty)
- Date:** (empty)

At the bottom, there are four buttons: Complete, Unsuccessful, Update, and Clear Form. The 'Complete' button is highlighted with a green checkmark icon.

You can update a variety of inputs for an *Import Shipment* in the *Header Details* window.

Click *Complete* to save all changes and close the window. A green check  is then displayed beside the task to indicate that it was successfully completed.

Click *Unsuccessful* to save and close the window. A red X  appears beside the task to indicate that it was not completed successfully.

Click *Update* to save, but not close the window.

Click *Clear Form* to clear all fields in this window.

Click *Close* to close the window without saving updates.

Update Import Shipment

The *Update Import Shipment* task is used to update the line items that you picked when you previously created an import shipment. Double-click the task to open the *Update Import Shipment* window.

Fig. 3.76

Update Import Shipment Task

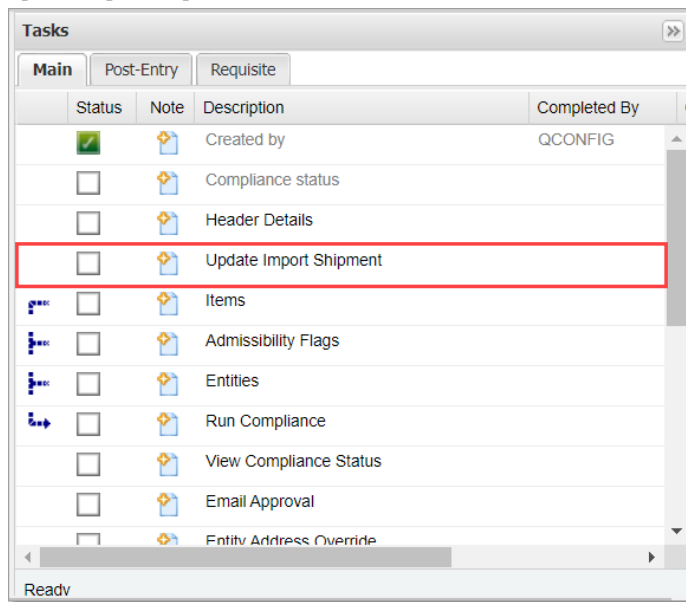
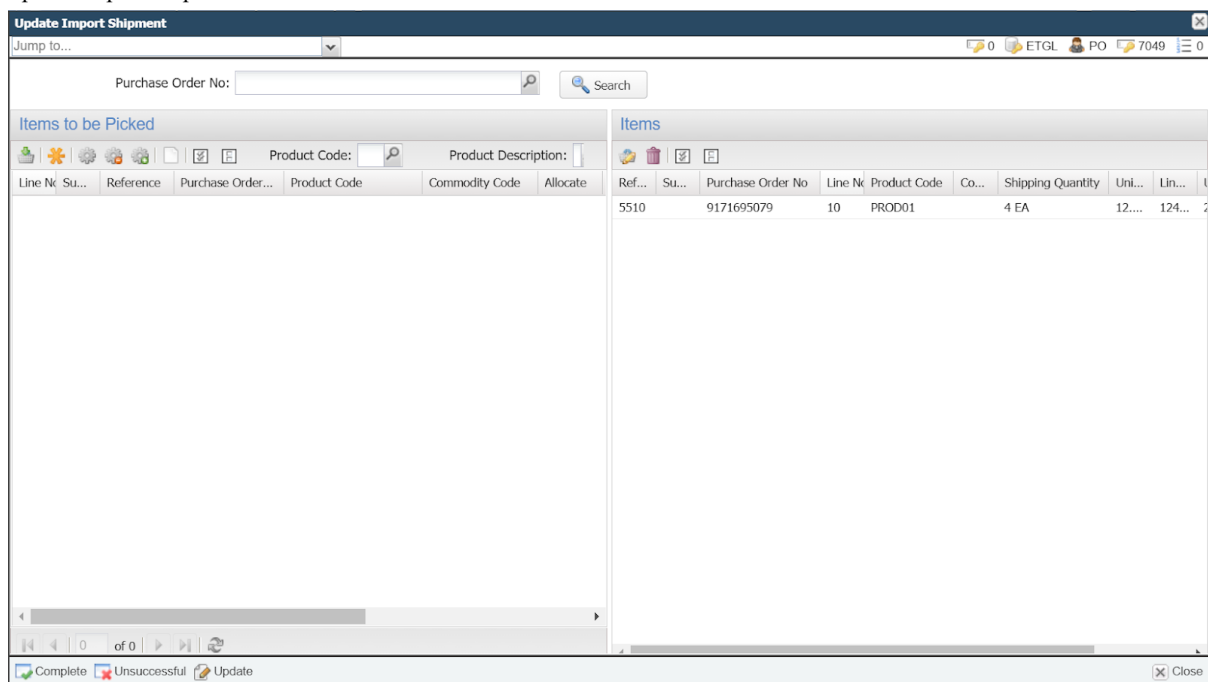


Fig. 3.77

Update Import Shipment Window



This window behaves the same as the *Create Import Shipment* window that was described in the *Create Entry Header* section. It is possible to remove all picked line items.

Click *Complete* to save all changes and close the window. A green check  is then displayed beside the task to indicate that it was successfully completed.

Click *Unsuccessful* to save and close the window. A red X  appears beside the task to indicate that it was not completed successfully.

Click *Update* to save, but not close the window.

Click *Close* to close the window without saving updates.

Items

The *Items* task enables you to add products that are associated with your import. Only associated items from the *Update Import Shipment* task are listed in this window. Double-click the *Items* task to open it.

Fig. 3.78

Items Task

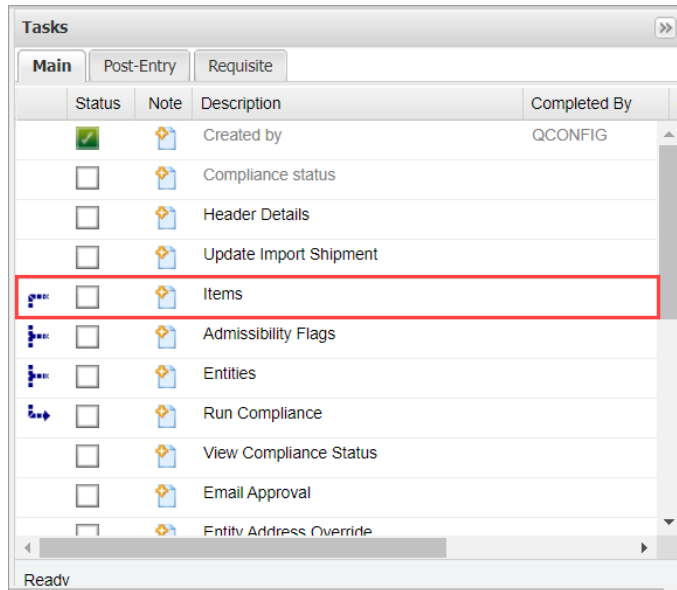
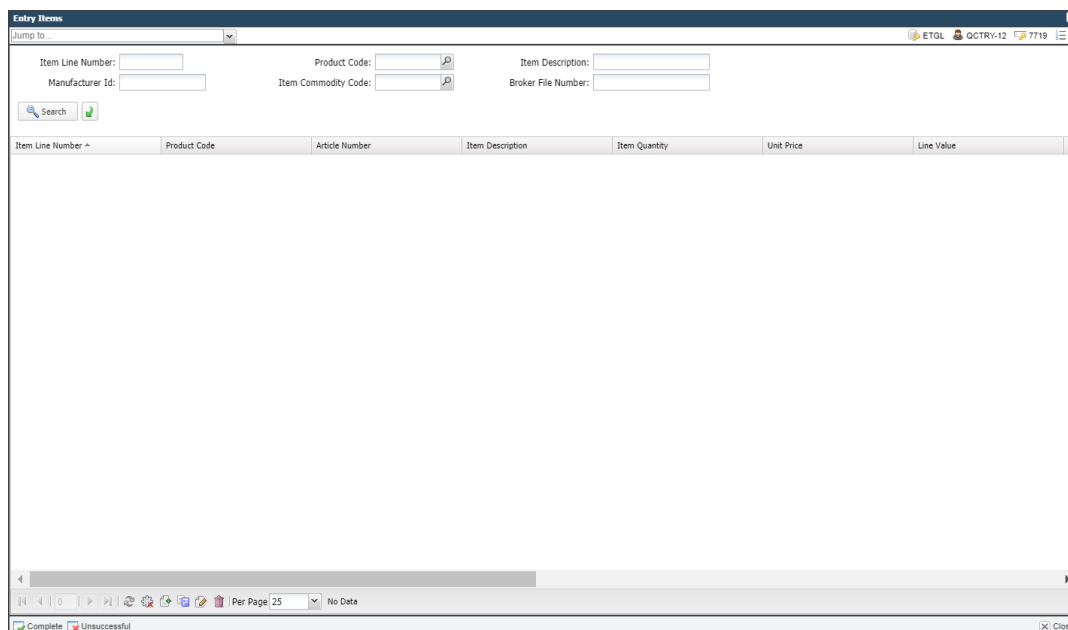


Fig. 3.79

Items Window

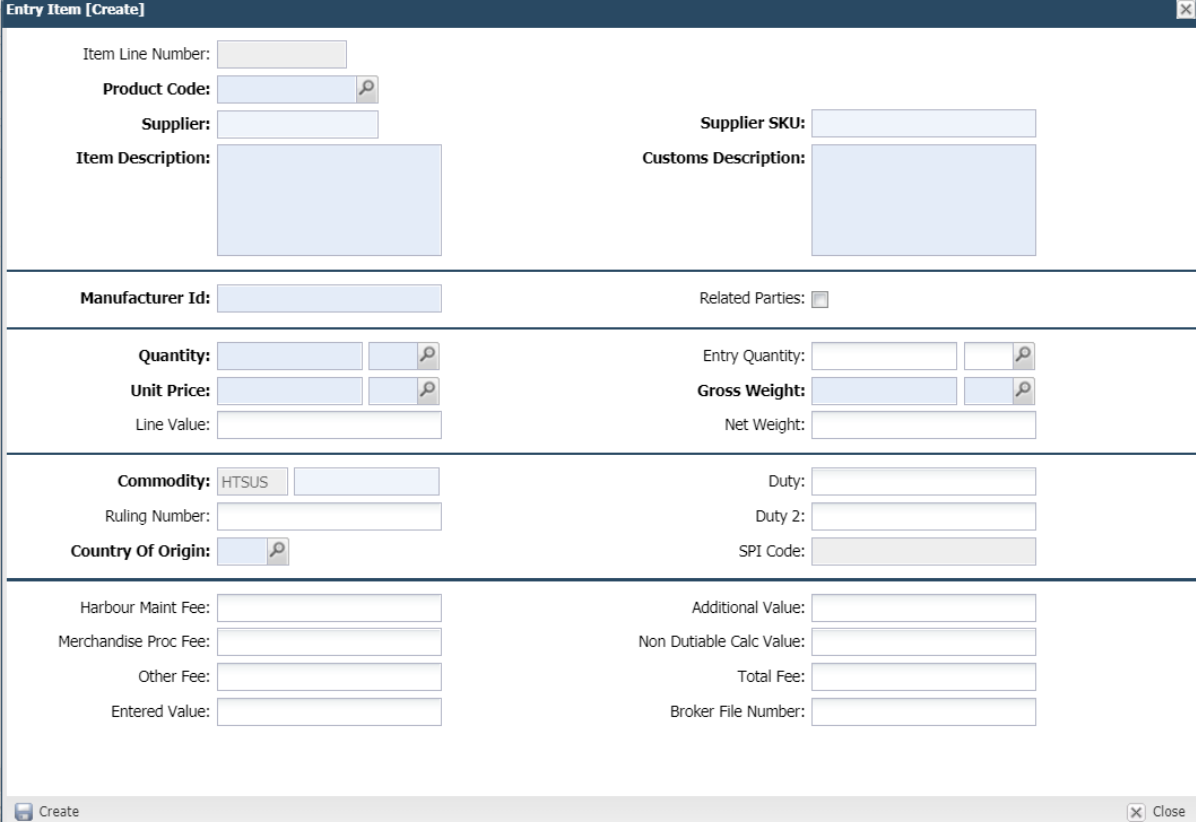


The search panel at the top of the window enables you to filter results in the grid below.

Add a new record by clicking the *Create*  button in the toolbar. The *Create Item* window displays.

Fig. 3.80

Entry Item [Create] Window



The **Entry Item [Create]** window contains the following fields:

- Item Line Number:** Text field
- Product Code:** Text field with a magnifying glass icon
- Supplier:** Text field
- Supplier SKU:** Text field
- Item Description:** Large text area
- Customs Description:** Large text area
- Manufacturer Id:** Text field
- Related Parties:** Check box
- Quantity:** Text field with a magnifying glass icon
- Entry Quantity:** Text field with a magnifying glass icon
- Unit Price:** Text field with a magnifying glass icon
- Gross Weight:** Text field with a magnifying glass icon
- Line Value:** Text field
- Net Weight:** Text field
- Commodity:** Dropdown menu (selected: HTSUS) and text field
- Duty:** Text field
- Ruling Number:** Text field
- Duty 2:** Text field
- Country Of Origin:** Text field with a magnifying glass icon
- SPI Code:** Text field
- Harbour Maint Fee:** Text field
- Additional Value:** Text field
- Merchandise Proc Fee:** Text field
- Non Dutiable Calc Value:** Text field
- Other Fee:** Text field
- Total Fee:** Text field
- Entered Value:** Text field
- Broker File Number:** Text field

At the bottom, there is a **Create** button and a **Close** button.

Fields with a blue background indicate a mandatory field.

If you supply a valid *Product Code* value that is associated with a product in the Product Master, the *Item Description*, *Customs Description*, *Supplier*, *Supplier SKU*, *Manufacturer ID*, *Gross Weight*, and *Commodity Code* fields populate automatically.

The *Supplier* field becomes available when the *Product Code* value is valid. Similarly, the *Supplier SKU* field becomes available when the *Supplier* value is valid.

For the *Supplier* field, a product must be linked to a supplier in the *Suppliers* tab of the *Product Master* window.

After you complete the fields, click *Create* to save the details and add the item to the task.

Note The decimal values in the *Item Line Number* column indicate the article sequence number for the product. No decimal point indicates that there are no related articles.

Fig. 3.81

Decimal Points, Item Line Number Column

Item Line Number ▲
1
1.1
1.2

Click *Complete* to save all changes and close the window. A green check  is then displayed beside the task to indicate that it was successfully completed.

Click *Unsuccessful* to save and close the window. A red X  appears beside the task to indicate that it was not completed successfully.

Click *Close* to close the window without saving updates.

Admissibility Flags

Admissibility flags add visualization and highlight requirements for applicable Partner Government Agencies (PGAs) and Additional Duties (Duty Add) for the product or articles in question. You can add admissibility flags to your purchase order using this task. Flags can be maintained in the Product Master also. Double-click the *Admissibility Flags* task to access the *Admissibility Flag* window.

Fig. 3.82

Admissibility Flags Task

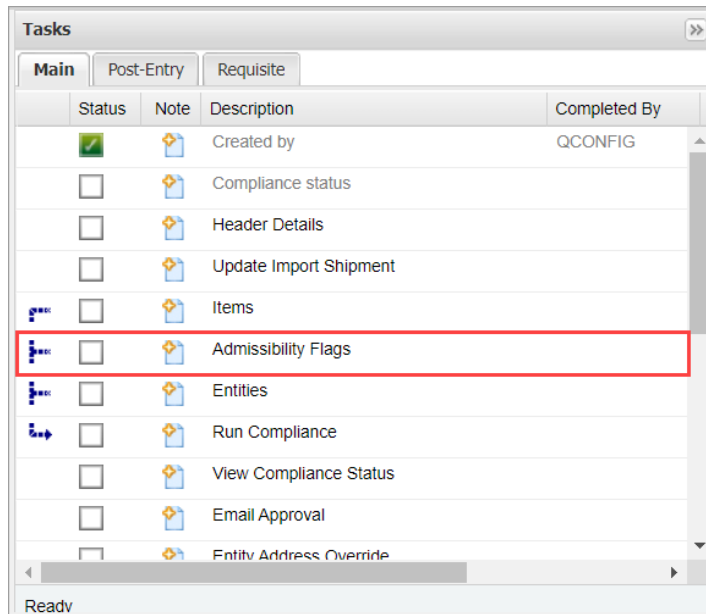


Fig. 3.83

Admissibility Flags Window

Line No	Product	Product Description	Article/Commodity	Admissibility Flag	Commodity Description	Advised Applicability	Filing Stat...	Status	Start Date	End Date
10	PROD_LBE_01	Bicycle 24 EXF4	HTSUS: 9018320000	AM1 - AMS Flag 1 - USDA/Agricultural Market	TUB.MET.NEEDLES:& FOR SUTURES	May Be Required	ADDED	●		
10	PROD_LBE_01	Bicycle 24 EXF4	HTSUS: 9018320000	FD2 - FD Flag 2 - FDA data required 801(a)	TUB.MET.NEEDLES:& FOR SUTURES	Always Required		●	2021/03/11	2021/03/23

The search panel at the top of the window enables you to filter results in the grid below.

You can choose to only view flags upon which a decision has not yet been made. To do this, enable the *Decision Not Made* field.

The buttons in the toolbar above the records are described below.

Table 3.7

Admissibility Flags Buttons

Button	Description
	Applicable. Only for automatically added flags.
	Not Applicable. Only for automatically added flags.
	Cancel Applicable Decision. Only for automatically added flags (after designating Applicable or Not Applicable).
	Add Admissibility Flag. Only for manually added flags.
	Delete Admissibility Flag. Only for manually added flags (after using Add Admissibility Flag).
	Show Commodity Flag Determination Data. For both automatically and manually added flags.
	Show Additional Information. For both automatically and manually added flags.

Note The decimal values in the *Line No* column indicate the article sequence number for the product. No decimal point indicates that there are no related articles.

Fig. 3.84

Line No. Column

Line No
1.1
1.1
1.2
1.2

The *Show Commodity Flag Determination Data*  button shows the user why a particular flag was applied automatically. Select a record, followed by the *Show Commodity Flag Determination Data* button. All relevant information appears in the *Trade Measure Flag Determination Data* window. Double-click a record to display flag information.

Fig. 3.85

Trade Measure Flag Determination Data Window

Trade Measure Flag Determination Data - PGA Flag: AM7										
Na...	Measure Ty...	Content Ty...	Commodity ...	Start Date	End Da...	Origin country group	Destination country group	Descripti...	Reason	Not
AM7	AFAM7	BASE	0102210010			OMNES	US		BASE	

Fig. 3.86

Subsection of Trade Measure Flag Determination Data Window

Trade Measure Flag Determination Data - PGA Flag: AM7

Na...	Measure Ty...	Content Ty...	Commodity ...	Start Date	End Da...	Origin country group	Destination country group	Descripti...	Reason	Not
AM7	AFAM7	BASE	0102210010			OMNES	US		BASE	

AM7

Measure Type: AFAM7

Commodity ID: 0102210010

Origin country group: OMNES

Destination country group: US

Legal Bases:

Content Type: BASE

Description:

Reason: BASE

Note:

Start Date:

End Date:

Close

Automatically Added Flags

Flags are often applied automatically due to configuration settings and the assigned commodity code. You can mark them as Applicable or Not Applicable by selecting a record in the grid and clicking the relevant button in the toolbar.

Fig. 3.87

Mark Flag as Applicable

Fig. 3.88

Mark Flag as Not Applicable

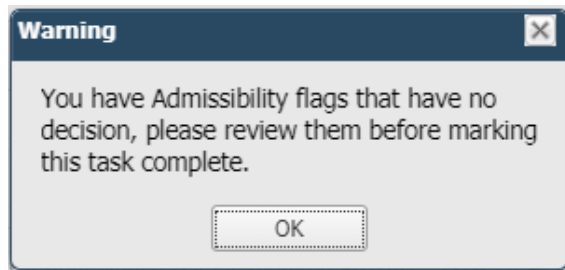
The *Notes* field in the *Applicable* and *Not Applicable* windows becomes mandatory if the specified value in the *Reason* field is *Other*.

The *Apply to future imports* field enables you to apply the relevant settings to all future imports with the same product. If the same product is used for a separate purchase order task, the same settings are applied until the *Apply to future imports* field is disabled. Your administrator can configure how this applies to future imports, as well as the flags that appear; for example, start and end dates can be applied to determine a date range for these settings.

Note You cannot mark the task as *Complete* without making a decision on the automatic flags.

Fig. 3.89

Pop-up Prompting User to Review Automatic Flags



Manually Added Flags

You can manually add flags in the *Admissibility Flags* task.

Click the *Add Admissibility Flag*  button in the *Admissibility Flags* window.

Fig. 3.90

Add Admissibility Flag

Add Admissibility Flag

Article:

Admissibility: ☒ PGA Flag ☐ Duty Add

Admissibility Flag:

Reason:

Note:

Start Date: End Date:

 Create  Close

The options presented in the lookup fields vary depending on whether the *PGA Flag* or *Duty Add* field is selected.

After completing the mandatory fields, click *Create* to close the window and add the item to the task.

Click *Complete* to save all changes and close the window. A green check  is then displayed beside the task to indicate that it was successfully completed.

Click *Unsuccessful* to save and close the window. A red X  appears beside the task to indicate that it was not completed successfully.

Flag Colors

The flags are color-coded as follows:

Table 3.8

Admissibility Flag Colors

Flag Color	Description
Orange	A decision has not been made on the flag.
Red	Flag marked as either applicable or flag was manually added.
Green	Flag marked as not applicable.

Entities

Entities can be added to the workflow using the *Entities* task. Double-click the *Entities* task to open it.

Fig. 3.91

Entities Task

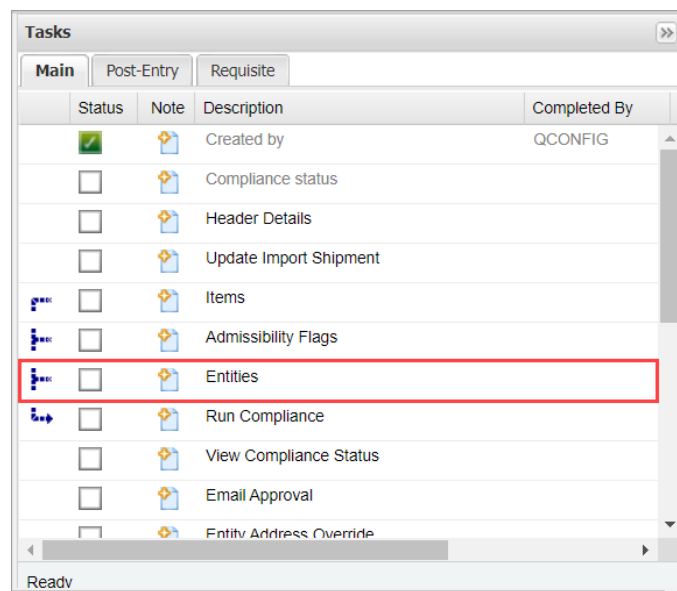


Fig. 3.92

Entities Window

Entities

Jump to...

0 PTGL PO 3081 0

Importer Of Record: 17_FRANCE

Ultimate Consignee: UC002

Importing Carrier:

Freight Forwarder:

Broker:

Booking Party:

Consolidator:

Stuffing Location:

FTZ Operator:

Shipper:

Seller: QA_SUPPLIER1

Manufacturer:

Consignee: CN001

Buyer:

Shipping Officer:

Save Complete Unsuccessful Configuration Information

Some fields fill automatically, depending on the details entered during the header creation or in the *Header Details* task.

Default Entities that appear are configurable by a system administrator.

Click *Complete* to save all changes and close the window. A green check  is then displayed beside the task to indicate that it was successfully completed.

Click *Unsuccessful* to save and close the window. A red X  appears beside the task to indicate that it was not completed successfully.

Click *Close* to close the window without saving updates.

Run Compliance

The *Run Compliance* task enables you to perform a compliance check. Double-click the *Run Compliance* task to initiate a check.

Fig. 3.93

Run Compliance Task

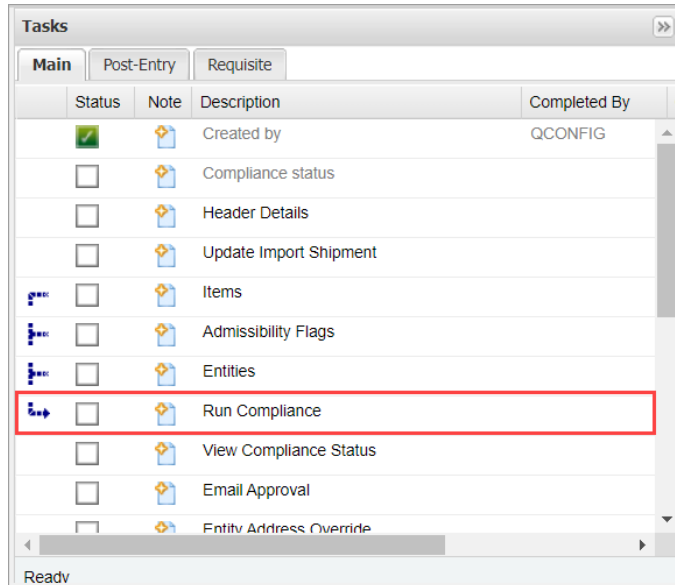
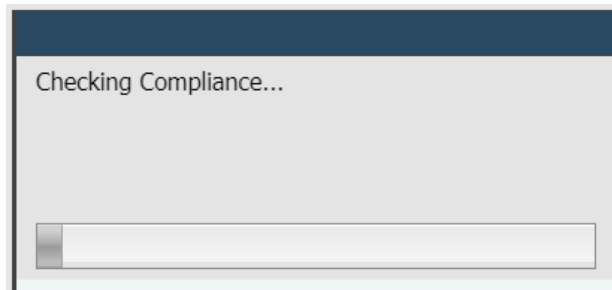


Fig. 3.94

Checking Compliance Window



A green check  is then displayed beside the task to indicate that compliance was run successfully.

View Compliance Status

This task is used to review the results from the *Run Compliance* task. Double-click the *View Compliance Status* task to access them.

Note The *Run Compliance* task must be completed in order to access the *View Compliance Status* task.

Fig. 3.95

View Compliance Status Task

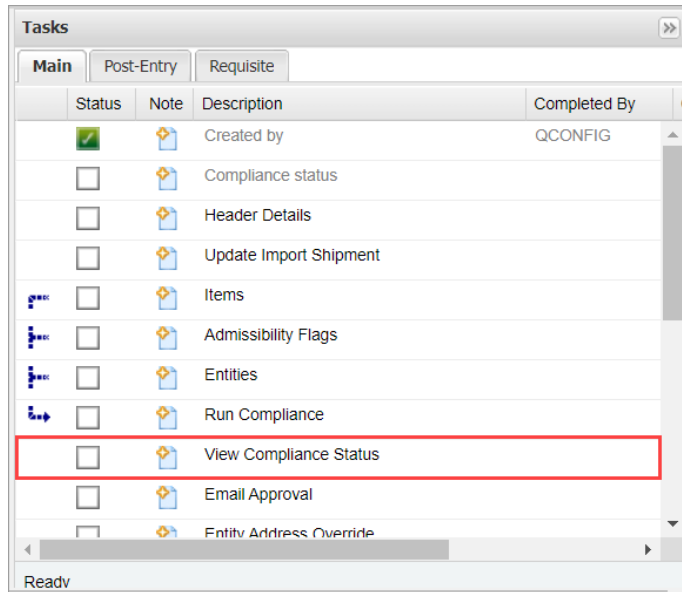
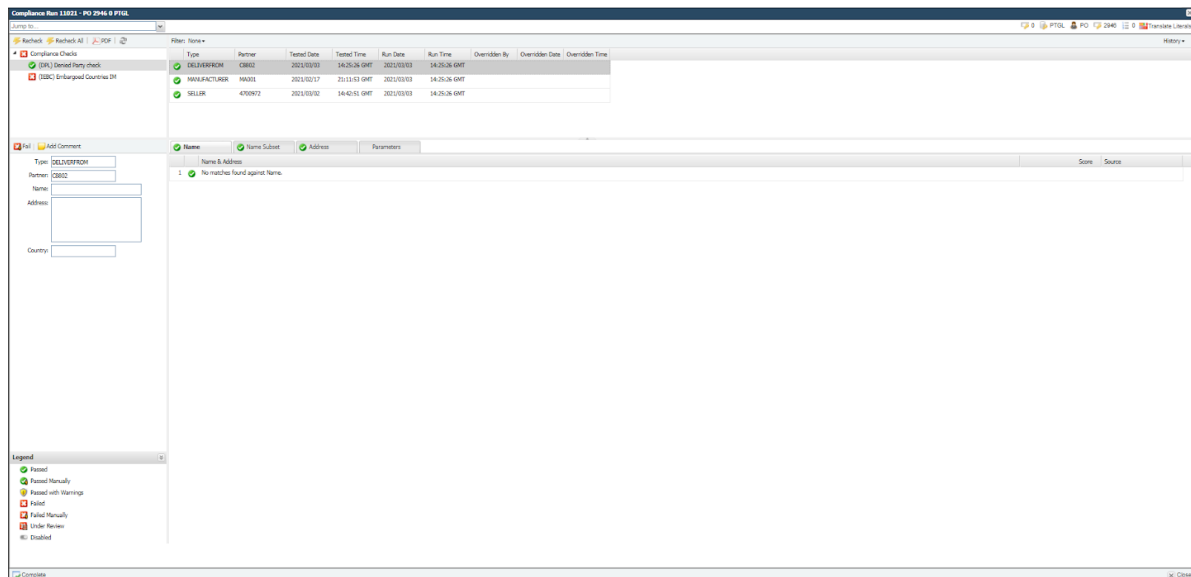


Fig. 3.96

View Compliance Status Window



For more information on this window, see Chapter 4 *Compliance Results* in the *Trade Compliance User Guide*.

Click *Complete* to save all changes and close the window. A green check is then displayed beside the task to indicate that it was successfully completed.

Entity Address Override

Using the *Entity Address Override* task, you can add entities associated with your import and modify their details. Double-click the *Entity Address Override* task to open it.

Fig. 3.97

Entity Address Override Task

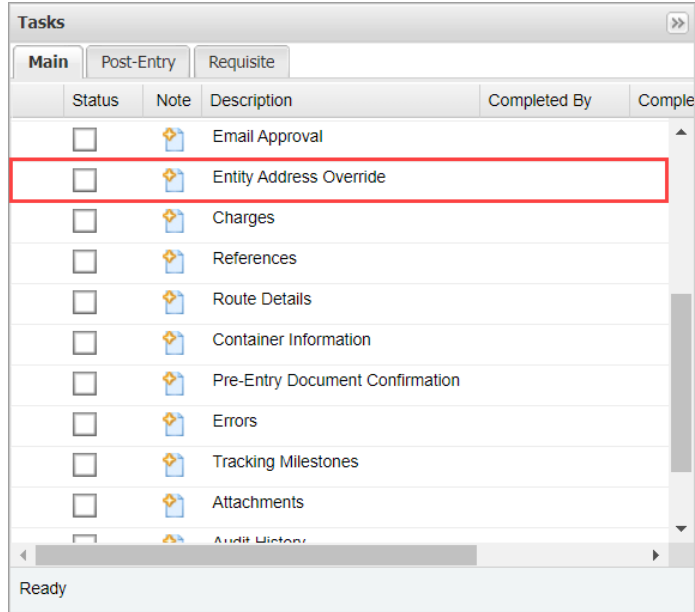
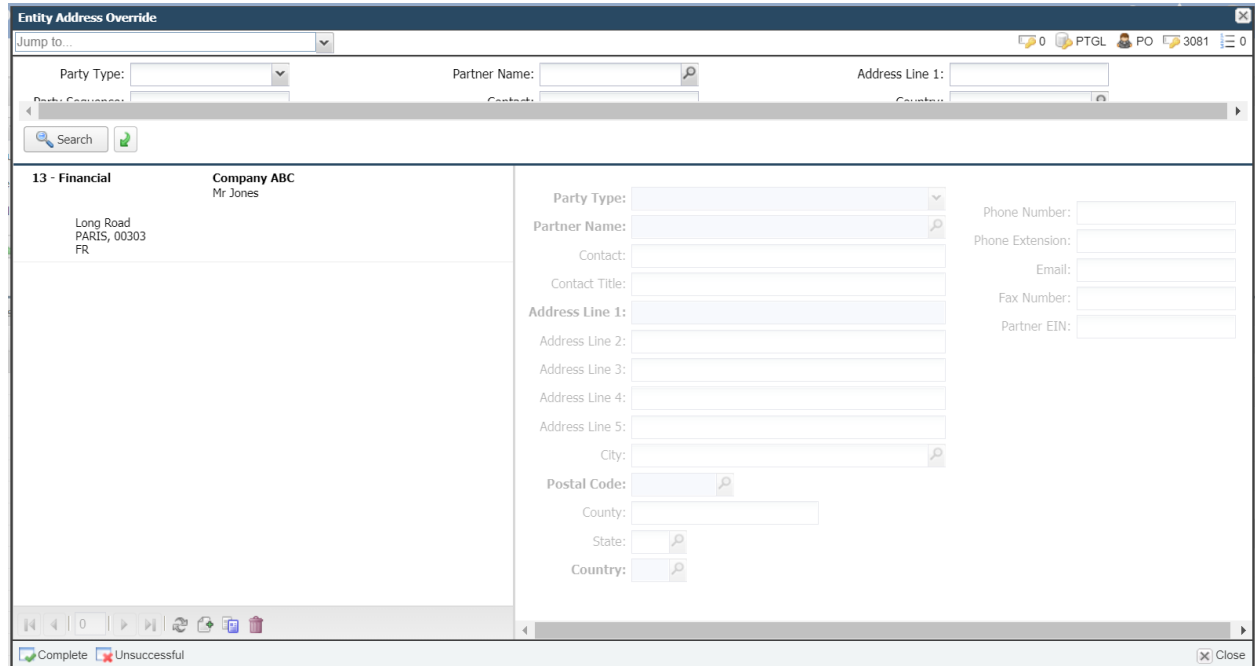


Fig. 3.98

Entity Address Override Window



The search panel at the top of the window enables you to filter results in the grid below.

The panel on the left displays entities that are already added to the product. Entities are added in the panel on the right.

Note Some records may appear due to previous inputs on the header.

Entities can be added, copied, and deleted using the *Add Record*, *Copy Record*, and *Delete Record* buttons in the bottom toolbar.

Fig. 3.99

Entity Address Override Buttons



Fig. 3.100

Add Entity Window

Select *Clear Form* to remove all details from the form.

Select *Save* to save the details.

Click *Complete* to save all changes and close the window. A green check  is then displayed beside the task to indicate that it was successfully completed.

Click *Unsuccessful* to save and close the window. A red X  appears beside the task to indicate that it was not completed successfully.

Click *Close* to close the window without saving any updates.

Charges

You can add applicable charges to your import through the *Charges* task. Double-click the *Charges* task to open it.

Note Despite sharing the same name as the purchase order workflow *Charges* task, this task behaves differently.

Fig. 3.101

Charges Task

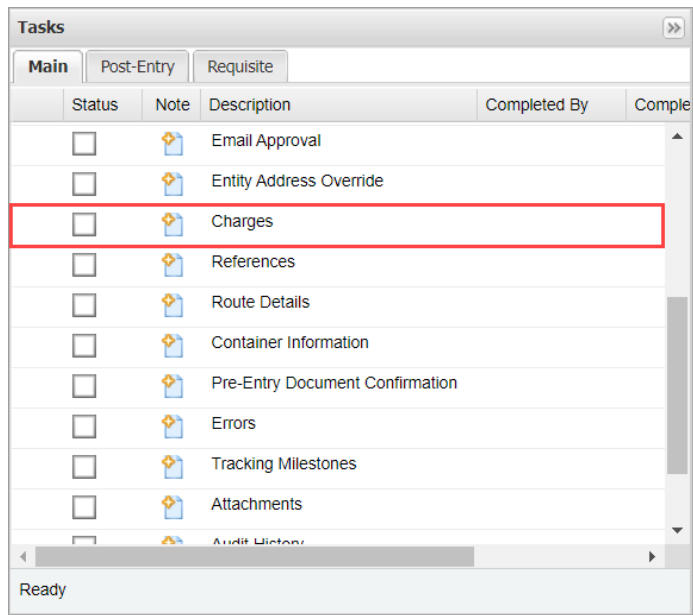
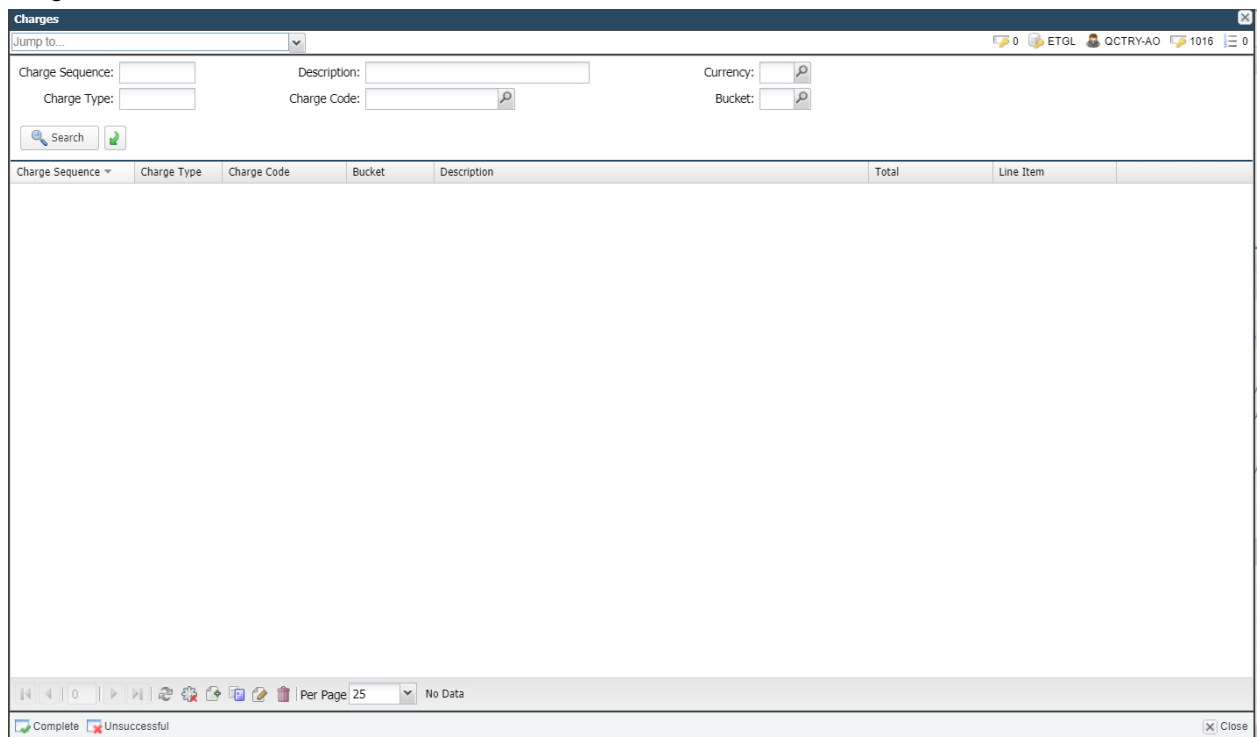


Fig. 3.102

Charges Window

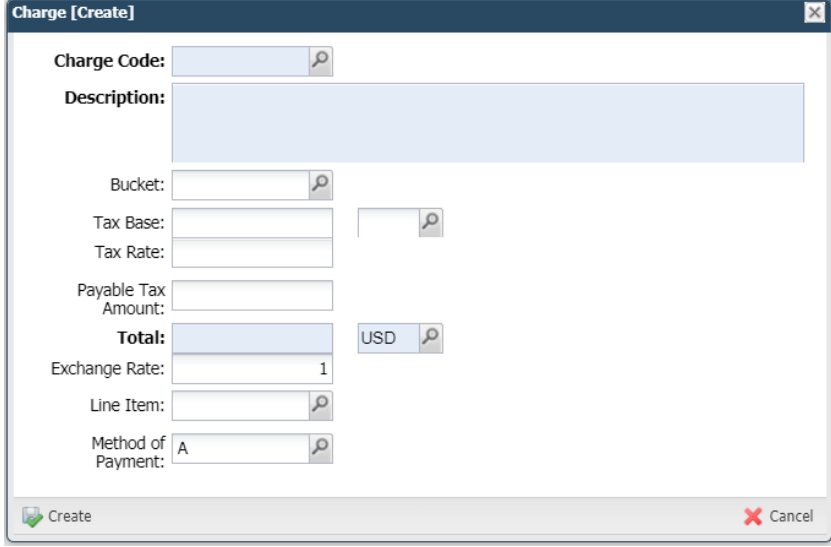


The search panel at the top of the window enables you to filter results in the grid below.

Add a charge by selecting the *Create*  button in the toolbar.

Fig. 3.103

Charge [Create] Window



Fields highlighted in blue indicate a mandatory field.

Depending on configuration settings, the value in the *Exchange Rate* field may default to 1 when you enter the native currency of the country of import.

Your administrator can set a default value for the *Method of Payment* field.

After completing the mandatory fields, click *Create* to save and add the charge to the task.

Click *Complete* to save all changes and close the window. A green check  is then displayed beside the task to indicate that it was successfully completed.

Click *Unsuccessful* to save and close the window. A red X  appears beside the task to indicate that it was not completed successfully.

Click *Close* to close the window without saving updates.

References

You can use the *References* task to add additional ad hoc elements to your import shipment. Double-click the *References* task to open it.

Fig. 3.104

References Task

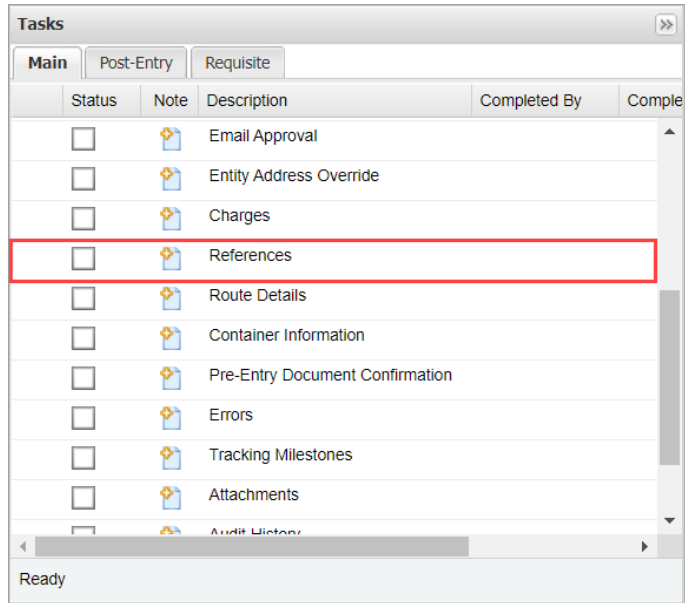


Fig. 3.105

References Window

The screenshot shows a window titled 'References' with a 'Jump to...' dropdown menu. The window contains several input fields for various details, organized into sections. At the top right, there are icons for '0', 'PTGL', 'PO', '3081', and '0'. At the bottom, there are buttons for 'Save', 'Complete', 'Unsuccessful', and 'Close'.

Fields include:

- Invoice Number: [Text Box]
- Invoice Date: [Date Picker]
- PO Number: [Text Box]
- BOL Number: [Text Box]
- House Airwaybill Number: [Text Box]
- Entry Number: [Text Box]
- Entry Date: [Date Picker]
- Resend Date: [Date Picker]
- Export Date: [Date Picker]
- Summary Date: [Date Picker]
- Import Date: [Date Picker]
- Estimated Departure Date: [Date Picker]
- Estimated Arrival Date: [Date Picker]
- Consignee No.: [Text Box]
- Importer No.: [Text Box]
- Reference No.: [Text Box]
- I.T. No.: [Text Box]
- I.T. Date: [Date Picker]

Some details may populate automatically, depending on the header.

Click *Save* to save all details.

Click *Complete* to save all changes and close the window. A green checkmark  is then displayed beside the task to indicate that it was successfully completed.

Click *Unsuccessful* to save and close the window. A red X  appears beside the task to indicate that it was not completed successfully.

Click *Close* to close the window without saving updates.

Route Details

You can use the *Route Details* task to add route details to your entry. Double-click the *Route Details* task to open it.

Fig. 3.106

Route Details Task

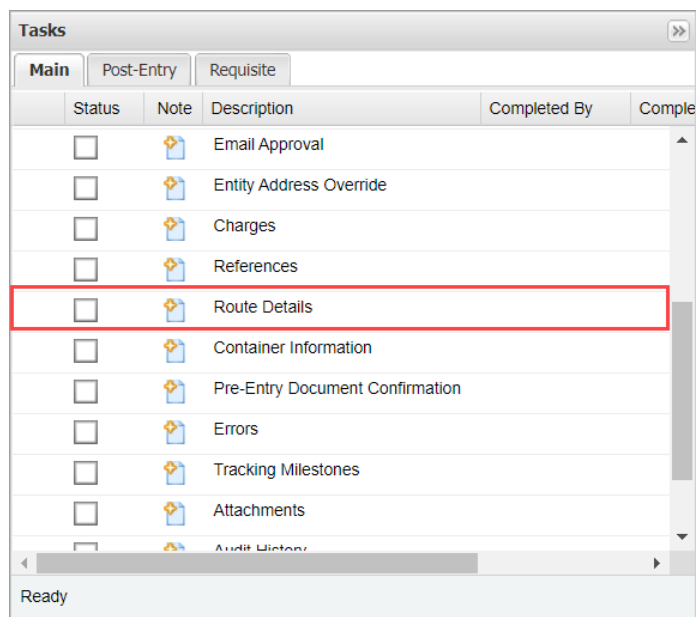


Fig. 3.107

Route Details Window

Route Details

Jump to: [dropdown]

Foreign Place of Lading: [text box]

Importing Carrier: TOMMAT [text box]

Place of Unloading: [text box]

Destination: [text box]

Estimated Departure Date: [calendar icon]

Estimated Arrival Date: [calendar icon]

Export Date: [calendar icon]

Import Date: 2020/05/20 [calendar icon]

Save Complete Unsuccessful Close

Some details may populate automatically, depending on the header.

Click *Save* to save all details.

Click *Complete* to save all changes and close the window. A green check  is then displayed beside the task to indicate that it was successfully completed.

Click *Unsuccessful* to save and close the window. A red X  appears beside the task to indicate that it was not completed successfully.

Click *Close* to close the window without saving updates.

Container Information

Information on containers and packing can be viewed and maintained using the *Container Information* task. Double-click the *Container Information* task to open it.

Fig. 3.108

Container Information Task

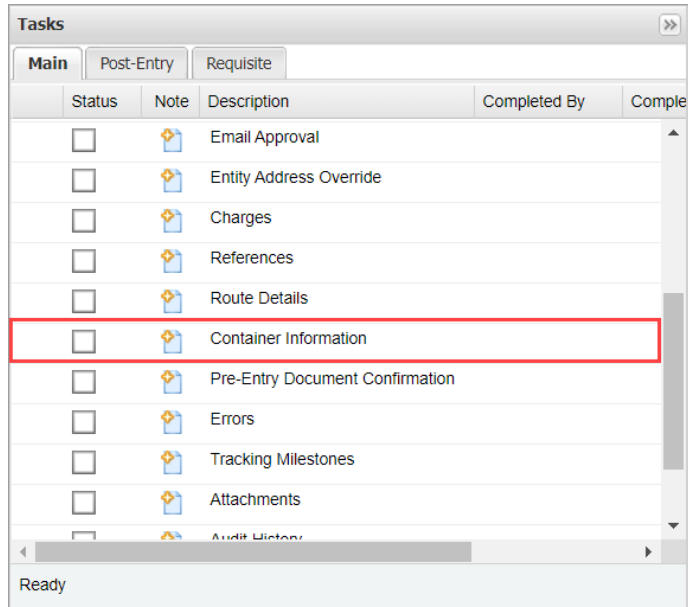
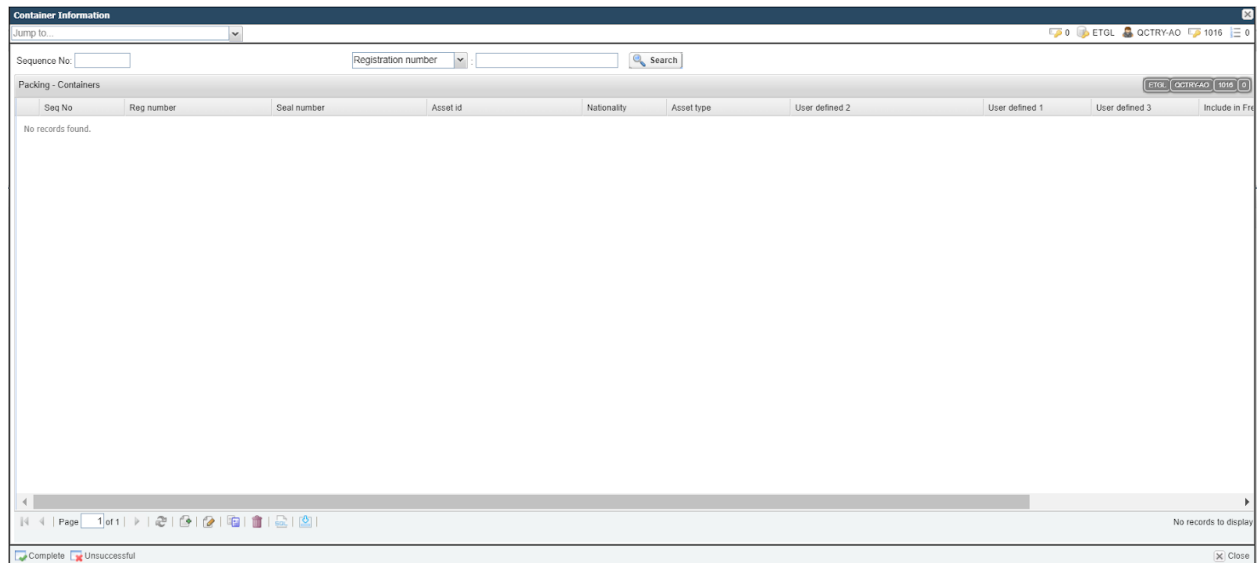


Fig. 3.109

Container Information Window



To add a new record, click the Create  button in the toolbar. The *Packing - Containers* window displays.

Fig. 3.110

Packing - Containers [Create] Window

The screenshot shows a software window titled "Packing - Containers [Create]". It contains the following fields and controls:

- Client: ETGL
- Consignor: QCTRY-HL
- Reference: 7210
- Despatch number: 0
- Sequence No: 20
- Include in Freight Calculations: ☒
- Asset id: [text box with search icon]
- Nationality: [text box with search icon]
- Asset type: [text box with search icon]
- Registration number: [blue highlighted text box]
- Seal number: [blue highlighted text box]
- User defined 1: [blue highlighted text box]
- User defined 2: [text box]
- User defined 3: ☐

At the bottom of the window, there is a "Create" button with a green plus icon and a "Close" button with a red X icon.

Fields highlighted in blue indicate a mandatory field.

The *Client*, *Consignor*, *Reference*, *Despatch Number*, and *Sequence No* fields are read-only.

Click *Create* to save and add the item to the task.

Click *Complete* to save all changes and close the window. A green check  is then displayed beside the task to indicate that it was successfully completed.

Click *Unsuccessful* to save and close the window. A red X  appears beside the task to indicate that it was not completed successfully.

Click *Close* to close the window without saving updates.

Attachments

The *Attachments* task is used to view broker feed documents and manually add documents to your import shipment workflow. See the *Broker Feed Documents* section for more information.

Double-click the *Attachments* task to open it.

Fig. 3.111

Attachments Task

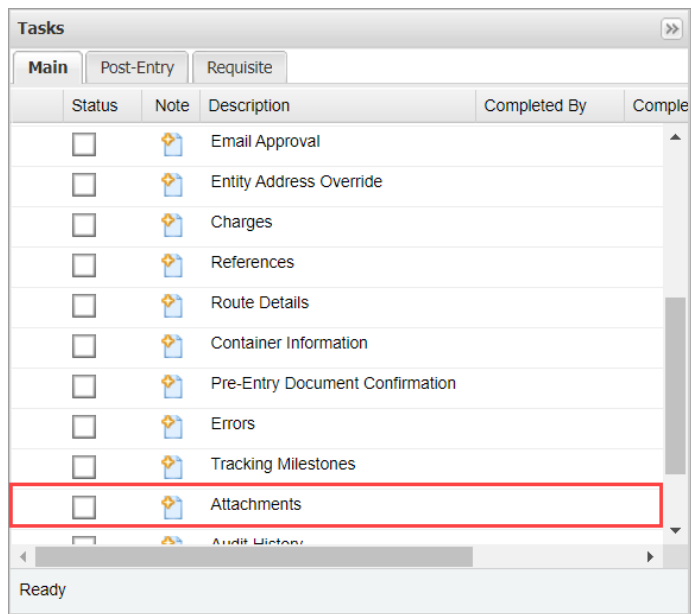
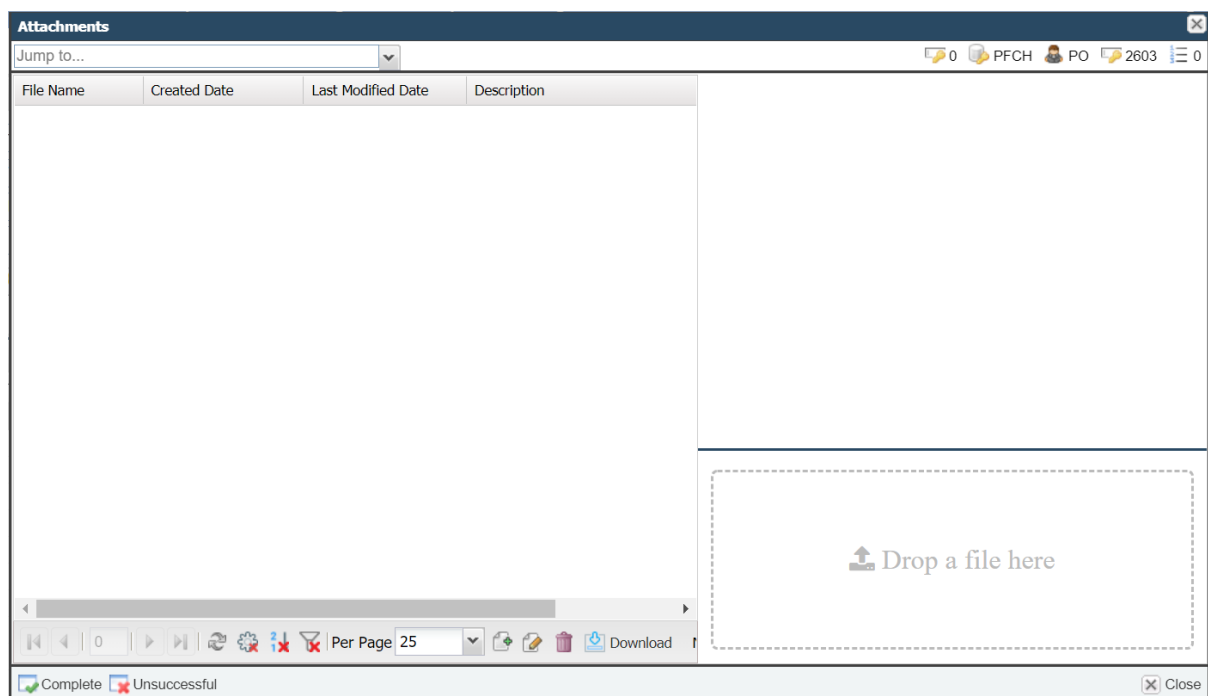


Fig. 3.112

Attachments Window



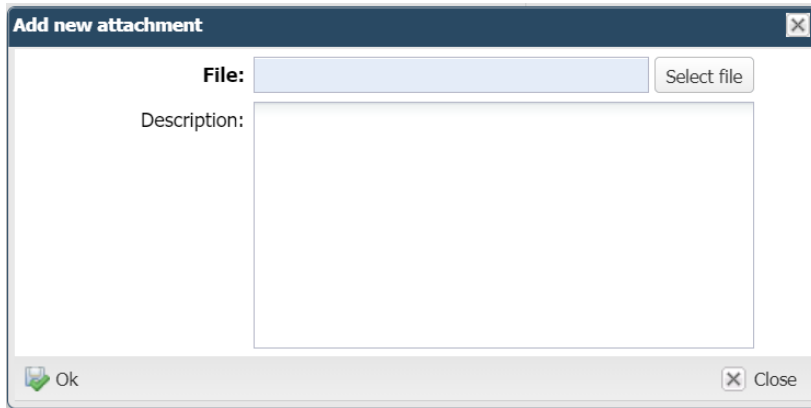
There are two ways to add documents:

- Click the *Add new attachment*  button in the toolbar
- Drag and drop a file into the *Drop a file here* area

Both methods prompt the *Add New Attachment* pop-up window.

Fig. 3.113

Add New Attachment Window



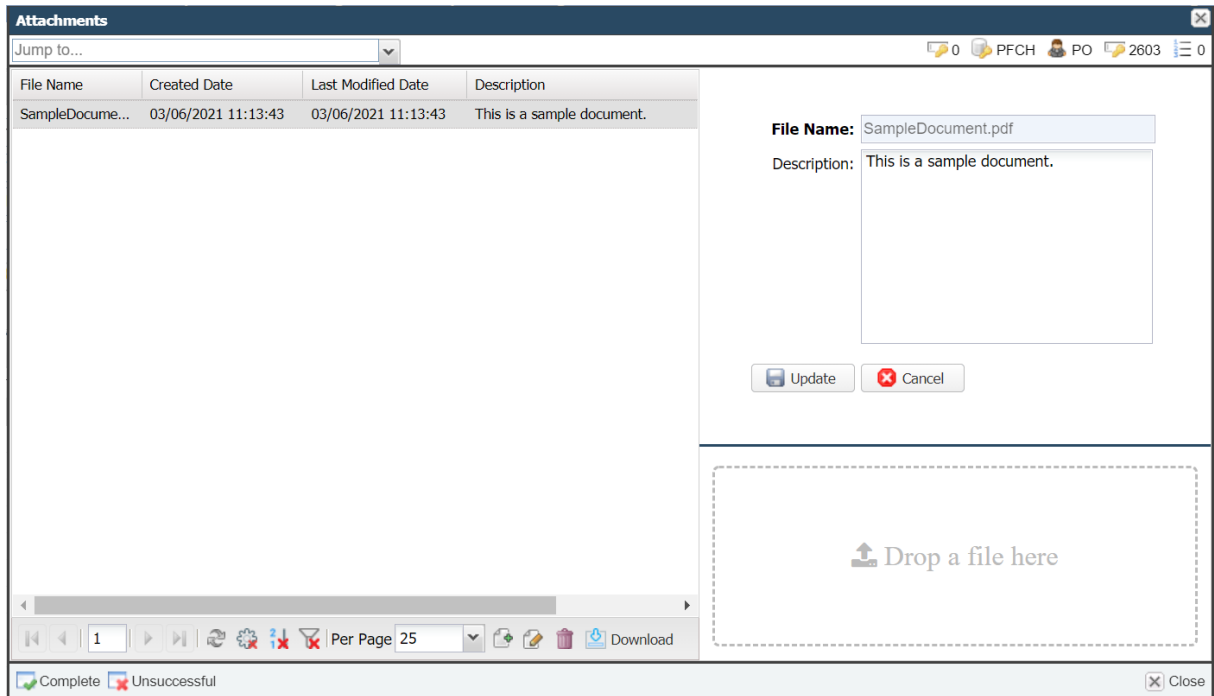
The 'Add new attachment' window has a title bar with a close button. Inside, there is a 'File:' label next to a text input field, with a 'Select file' button to its right. Below this is a 'Description:' label next to a larger text area. At the bottom, there are 'Ok' and 'Close' buttons.

If you did not use the drag and drop method, click *Select file* to choose a file on your computer. Add a description for the attachment in the *Description* field. Then click *Ok*. A new record is now present in the *Attachments* grid.

Existing records can be edited by selecting one in the grid and updating the details in the panel to the right. Click *Update* to save the changes.

Fig. 3.114

Edit Attachment, Attachments Window



The 'Attachments' window has a title bar with a close button. Below the title bar is a 'Jump to...' dropdown menu. The main area is divided into two sections. The left section contains a table with the following data:

File Name	Created Date	Last Modified Date	Description
SampleDocume...	03/06/2021 11:13:43	03/06/2021 11:13:43	This is a sample document.

The right section contains a 'File Name:' label next to a text input field with the value 'SampleDocument.pdf'. Below it is a 'Description:' label next to a text area with the value 'This is a sample document.'. At the bottom of this section are 'Update' and 'Cancel' buttons. Below the main content area is a dashed box with an upload icon and the text 'Drop a file here'. At the bottom of the window is a toolbar with various icons, including a 'Download' button. The status bar at the very bottom shows 'Complete' and 'Unsuccessful' checkboxes, with 'Complete' checked.

You have the option of deleting attachments using the *Delete*  button in the toolbar.

You can also download attachments by selecting a record and clicking the *Download*  **Download** button.

Click *Complete* to save all changes and close the window. A green check  is then displayed beside the *Attachments* task to indicate that it was successfully completed.

Click *Unsuccessful* to save and close the window. A red X  appears beside the task to indicate that it was not completed successfully.

Click *Close* to close the window without saving updates.

Email Approval

The *Email Approval* task is used to send approval emails to a supplier or broker. Double-click the *Email Approval* task to open it.

Send New Request

To create a new email request for the supplier, click *Click the Send New Request* button. This displays the *Create Email Request* window.

Fig. 3.115

Send New Request Button

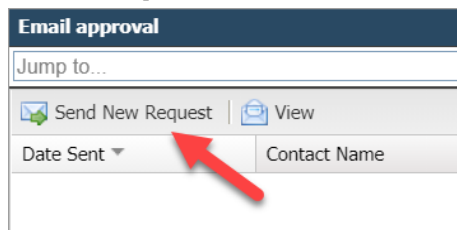
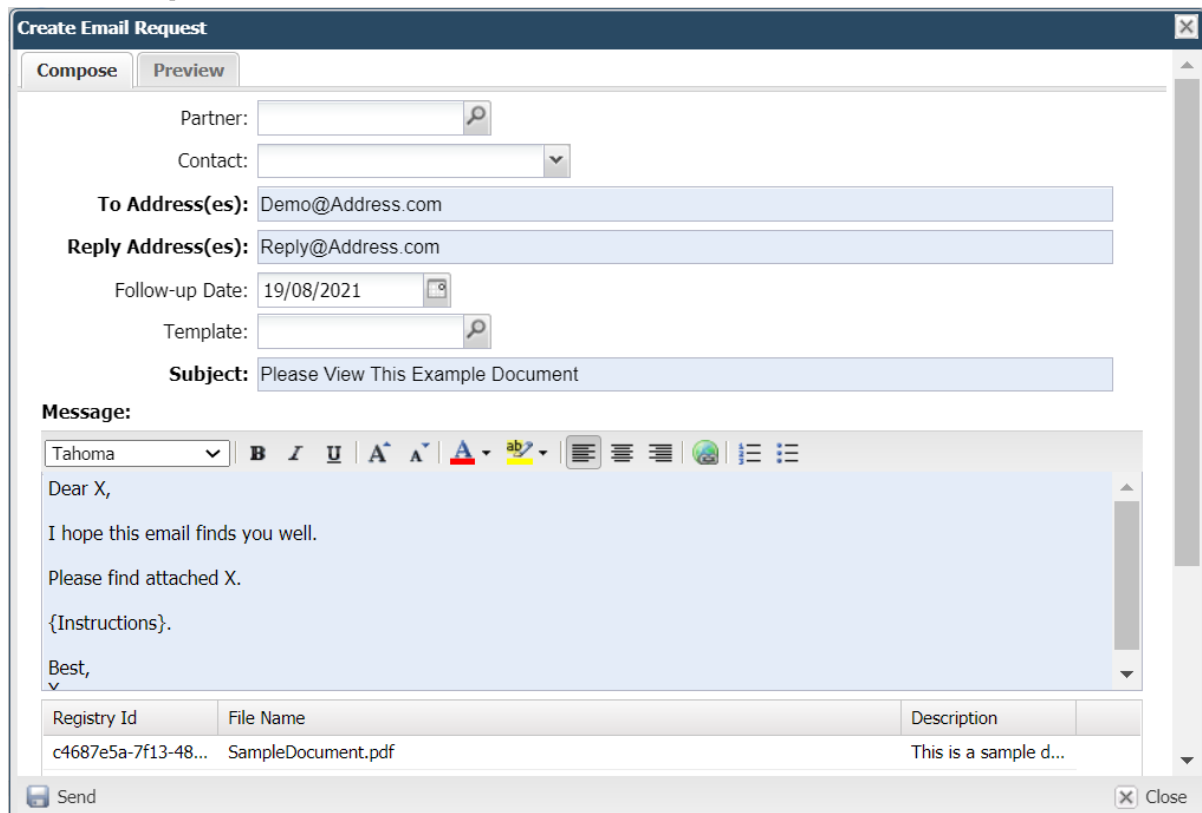


Fig. 3.116

Create Email Request Window



The fields in the window are described in the table below.

Table 3.9

Create Email Request Fields

Field	Description
Partner	Specify a partner using the lookup.
Contact	This field may autofill, depending on the partner configuration.
To Address(es)	This field may autofill, depending on the partner configuration. You can add multiple email addresses by using a semicolon to separate them.
Reply Address(es)	You can add multiple Reply To email addresses by using a semicolon to separate them.
Follow-up Date	The default is 30 days from the current date. Note This field is for reference purposes only.
Template	Your administrator may have created and configured email templates. Click the lookup icon to select one.
Subject	Insert an email subject line.
Message	Compose an email and style it using the formatting options in the toolbar.

Note Emails are sent in standard format. There is no BCC feature.

When the *Add attachment(s)* option is selected, the *Select Attachment(s)* window displays.

Fig. 3.117

Supplier Attachment(s)

Select attachment(s)				
	File Name	Created Date	Last Modified Date	Description
	SampleDocument.pdf	03/06/2021 11:13:43	03/06/2021 11:13:43	This is a sample document.

Documents on the *Attachments* task are displayed in this window.

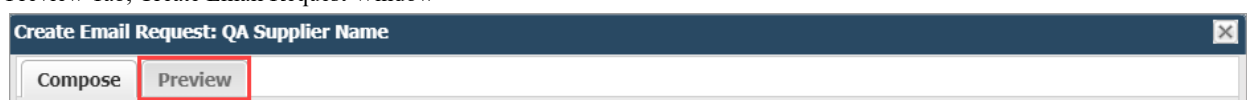
Click the green plus  button beside a document record to attach it to the email.

You can remove an attachment in the same window by clicking the red delete  button.

The *Preview* tab in the *Create Email Request* window allows you to review the inputted details before sending.

Fig. 3.118

Preview Tab, Create Email Request Window



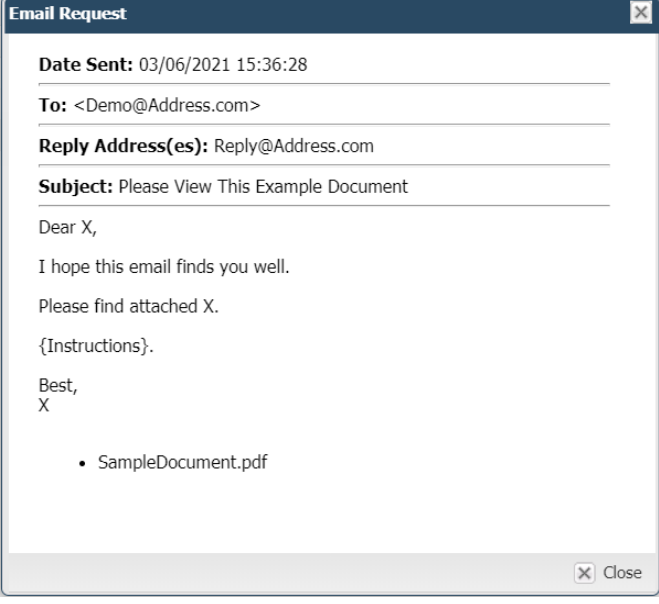
If all details are correct, click the *Send* button to send the email to the specified addresses.

The *View* option in the *Email Approval* window enables you to view the details of a previously sent email. Select a record in the grid and then click *View*. The *Email Request* window displays.



Fig. 3.119

Email Request Window



Email Request

Date Sent: 03/06/2021 15:36:28

To: <Demo@Address.com>

Reply Address(es): Reply@Address.com

Subject: Please View This Example Document

Dear X,

I hope this email finds you well.

Please find attached X.

{Instructions}.

Best,
X

- SampleDocument.pdf

Close

Click *Complete* to save all changes and close the window. A green check  is then displayed beside the task to indicate that it was successfully completed.

Click *Unsuccessful* to save and close the window. A red X  appears beside the task to indicate that it was not completed successfully.

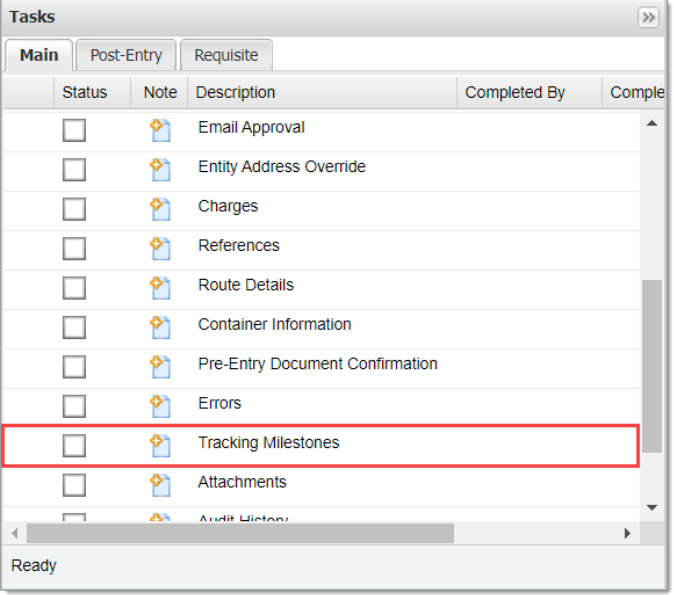
Click *Close* to close the window without saving updates.

Tracking Milestones

The *Tracking Milestones* task is used to provide tracking information for your shipment. Double-click the *Tracking Milestones* task to open it.

Fig. 3.120

Tracking Milestones Task



Tasks

Main | Post-Entry | Requisite

Status	Note	Description	Completed By	Comple
☐		Email Approval		
☐		Entity Address Override		
☐		Charges		
☐		References		
☐		Route Details		
☐		Container Information		
☐		Pre-Entry Document Confirmation		
☐		Errors		
☐		Tracking Milestones		
☐		Attachments		
☐		Audit History		

Ready

Fig. 3.121

Tracking Milestones Window

Tracking Milestones

Jump to...

Sequence: Name : Search

Tracking

Name	Carrier	Account	Description	Status Code	Event Type	Date	Time	Proof of Delivery
No records found.								

Page 1 of 1

No records to display

Complete Close

The system retrieves a CSV file from an integrated server and creates a record. This file can also update existing records. When the file is received, the bill of lading is then used to link to an existing import shipment.

If a matching bill of lading cannot be found, or there are multiple import shipments with the same bill of lading, a match is not created. A notification email is sent to alert users if this occurs.

Five pre-configured messages can be received:

- Ship Date: The carrier departed the pickup location with the shipment.
- Arrival Date: The shipment was received at the destination depot.
- Clearance Delay: Additional clearing agency information or documentation is required for clearance.
- Customs Cleared: The shipment was released from customs or another agency.
- Final Delivery: Completed unloading at the delivery location.

The search panel at the top of the window enables you to filter results in the grid below.

To manually create a tracking record, click the *Create*  button in the bottom toolbar.

Fig. 3.122

Tracking [Create]

The screenshot shows a window titled "Tracking [Create]" with a close button in the top right corner. The window contains the following fields:

- Client: ETGL
- Consignor: QCTRY-QW
- Reference: JW00003
- Despatch number: 0
- Sequence: 10
- Name: (empty text box)
- Carrier: (empty text box with a magnifying glass icon)
- Account: (empty text box)
- Description: (empty text box)
- Event Type: (blue dropdown menu)
- Status Code: (blue dropdown menu)
- Date: (date picker showing 3)
- Time: 0
- Proof of Delivery: (empty text box)

At the bottom of the window, there is a "Create" button with a green plus icon and a "Close" button with a close icon.

The fields in this window reflect the information in the retrieved CSV file. The *Client*, *Consignor*, *Reference*, *Despatch Number*, and *Sequence* fields may populate automatically.

Note The value in the *Sequence* field must be unique for each record.

Click *Create* to save and add the record.

Click *Complete* to save all changes and close the window. A green check  is then displayed beside the *Attachments* task to indicate that it was successfully completed.

Errors

Using the *Errors* task, you can review any errors related to the import shipment that were detected. These errors are added automatically as a result of interaction with other tasks and cannot be added manually. Double-click the *Errors* task to access the *Errors* window.

Fig. 3.123

Errors Task

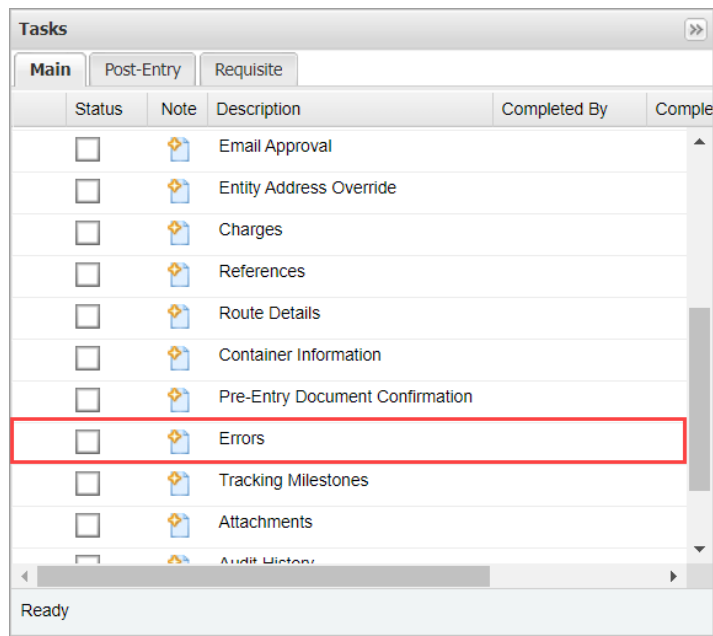
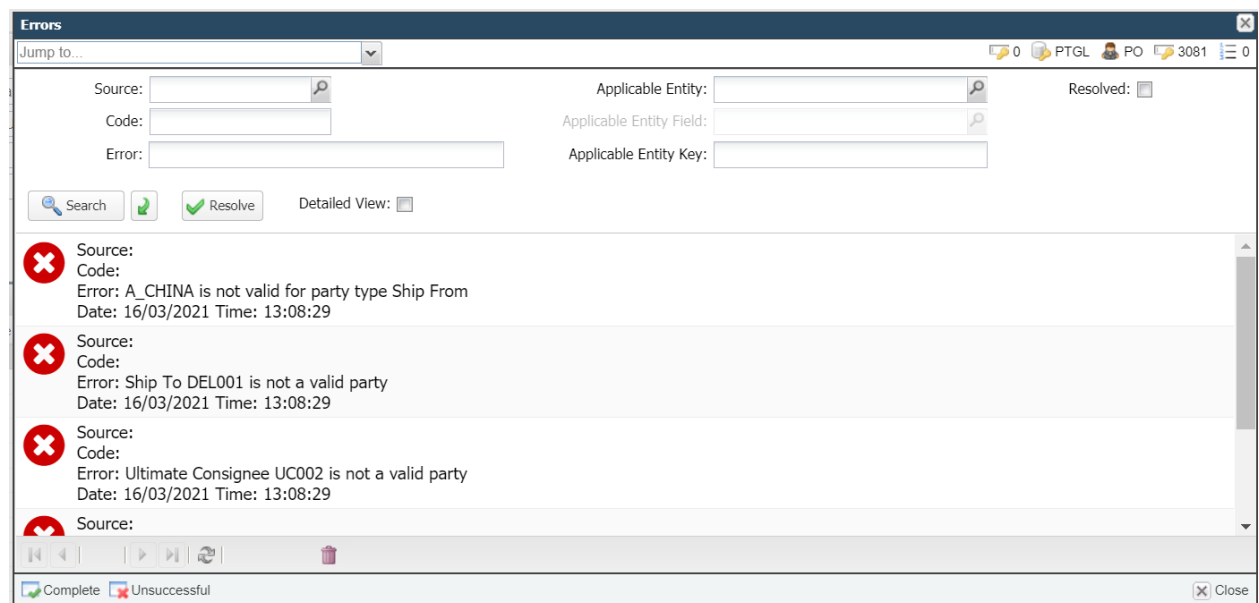


Fig. 3.124

Errors Window



The search panel at the top of the window enables you to filter results in the grid below.

Note *Applicable Entity Field* becomes available when a valid value is entered in the *Applicable Entity* lookup field.

To mark a task as resolved in the database, select an error in the list and click *Resolve*.

To include resolved tasks in the list of errors, enable the *Resolved* field in the search panel

The *Detailed View* field shows more information regarding the error.

You can also delete a record by selecting it and clicking the *Delete* button.



Click *Complete* to save all changes and close the window. A green check  is then displayed beside the *Errors* task to indicate that it was successfully completed.

Click *Unsuccessful* to save and close the window. A red X  appears beside the task to indicate that it was not completed successfully.

Click *Close* to close the window without saving updates.

Audit History

The Audit History feature records any changes that are made to the workflow. This is a read-only task. To access the *Audit History* window, double-click the *Audit History* task.

Fig. 3.125

Audit History Task

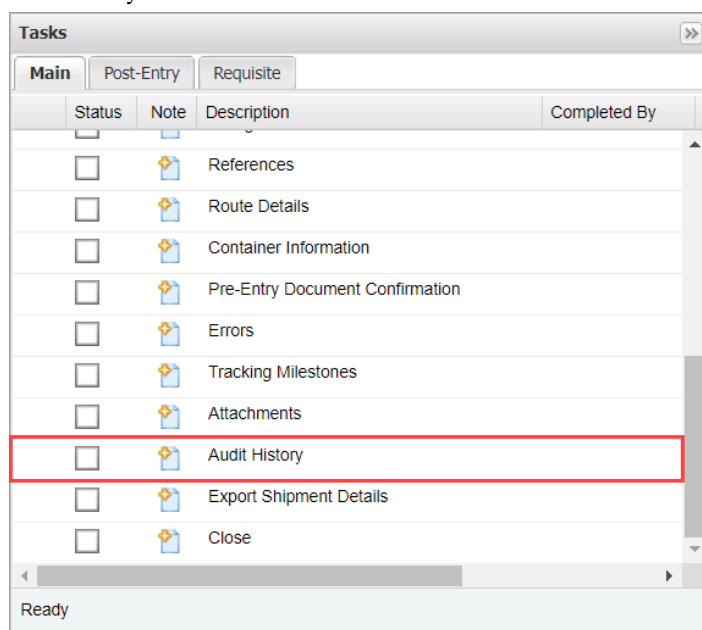


Fig. 3.126

Audit History Window

Audit History

Jump to...

0 PTGL PO 3081 0

Audit History

Entities

Shipment status: UPDATED

New address line 1 was created: 13 / Company ABC.

QCONFIG (Configuration User - All Roles) 2021/03/17 11:47:47 UTC+0

Admissibility Flag

Shipment status: UPDATED

10 - PROD_LBE_01
AM1 - PGA Flag Added
HTSUS: 9018320000

AMS Flag 1 - USDA/Agricultural Marketing Service Data related to egg products may be required

QCONFIG (Configuration User - All Roles) 2021/03/17 11:32:39 UTC+0

Partners

Shipment status: UPDATED

QA_SUPPLIER1 Supplier SOP was updated.
Sop Received Date changed from null to 2019-11-18.
Supplier Type changed from EMPTY to TPP.
Sop Status changed from EMPTY to CONFIRMED.

1 of 1 Per page 25 1 - 7 of 7

Close

Broker Feed Documents

The *Attachments* task on an import shipment workflow accepts documents that are received through integrated brokers. When a document is received and accepted, it functions the same as a manually added document. When a broker document is received, it searches for an import shipment workflow with a matching billing of lading or entry number.

When a match is found, the broker document is present in the *Attachments* task. See the *Attachments* section for more information. However, if an import shipment workflow match is not found, it is displayed in the *Unmatched Broker Documents* area of the Imports Portal.

Unmatched Broker Documents

To maintain unmatched broker document records, access QuickPath option IMP, the Imports Portal.

Fig. 3.127

Unmatched Broker Documents, Imports Portal

Unmatched Broker Documents				
File Name	Created Date ↓	Broker Feed ID	Broker Reference	
AUTOTEST100040000_20210404.pdf	05/04/2021 09:51:06	OIA	TST2001040000	
AUTOTEST100040000_20210404.pdf	04/30/2021 16:20:11	OIA	TST2001040000	
TST2001040000_20210404_20210404.pdf	04/30/2021 16:20:02	FTN	TST2001040000	
TST2001040000_20210404_20210404.pdf	04/30/2021 16:18:50	FTN	TST2001040000	
AUTOTEST100040000_20210404.pdf	04/30/2021 10:15:45	OIA	TST2001040000	
AUTOTEST100040000_20210404.pdf	04/30/2021 09:55:02	OIA	TST2001040000	
XXXXX_20210407_20210407.pdf	04/28/2021 17:03:30	FTN	XXXXX	
XXXXX_20210407.pdf	04/27/2021 17:58:03	OIA	XXXXX	
XXXXX_20210407_20210407.pdf	04/27/2021 16:08:48	FTN	XXXXX	
AUTOTEST100040000_20210407.pdf	04/27/2021 16:07:54	OIA	XXXXX	
MOP001_20210500_20210510.pdf	04/22/2021 16:11:40	FTN	MOP001	
MOP001_20210500_20210510.pdf	04/22/2021 16:11:37	FTN	MOP001	
2021-03-17_000000_04_gmp	04/09/2021 11:51:54			

To view the document, select a record in the grid and click the *Download Document*

 **Download Document** button in the toolbar. The PDF document downloads to your device.

If necessary, you can update an import shipment bill of lading or entry number by accessing the *References* workflow task.

Both the *BOL Number* and *Entry Number* fields are used to add a bill of lading and entry number respectively.

Fig. 3.128

BOL Number and Entry Number Fields, References Task

References

Jump to...

Invoice Number:

PO Number:

BOL Number:

Entry Number:

Entry Date:

Export Date:

Summary Date:

You can also add an entry number on the *Header Details* task with the *Filer Code / Entry No.* field.

Fig. 3.129

Filer Code / Entry No. Field, Header Details Task

After updating these details, return to the *Unmatched Broker Documents* page in the Imports Portal and select the record that you want to match. Then click the *Retry*  *Retry* button.

The system then attempts to attach the broker document to a purchase order. If successful, the record disappears from the *Unmatched Broker Documents* grid and appears in the *Attachments* task. Otherwise, a message displays to inform you that a match could not be found.

Note If multiple workflows have the same bill of lading or entry number, no match occurs.

Fig. 3.130

Unsuccessful Match Message

System ▾ Printing ▾ Security ▾		
No match found for document AZTST21052017214_20210520.pdf.		
! Unmatched Broker Documents		
File Name	Created Date ↓	Broker Feed ID
TST21052017258_20210520_20210520.pdf	20/05/2021 17:25:33	FTN
TST21052017257_20210520_20210520.pdf	20/05/2021 17:25:12	FTN

The other menu options, *Background Jobs* and *Broker Document Feeds*, apply to a system configurator. *Background Jobs* relates to how the system stores and receives documents. *Broker Document Feeds* shows integrated brokers. *Import File* is used to manually upload a document.

Chapter 4

Product Labels

This section describes how you can maintain product labels and view relevant analytics.

Overview

Describes how to manage and interact with product labels.

Product Master Dashboard (Label Dashboard)

Describes how to use the Product Master Dashboard to view analytics and quickly access review labels.



Overview

Products may be assigned labels on various portals throughout the system. The term *Labels* is used as a synonym for tags or marks. A product with a label requires attention. This section details how to manage and interact with these labels.

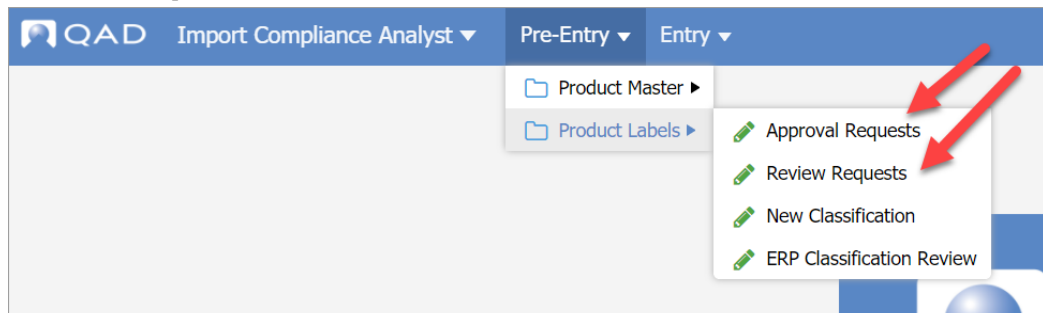
The following label types apply to this product version:

- Classification Review Request (QuickPath PCMR)
- Classification Approval Request (QuickPath PCMA)

To access the *Product Master* page click the *Pre-Entry* option in the top horizontal menu. Next, hover over *Product Labels* in the drop-down menu and select *Approval Requests* or *Review Requests* in the submenu. Alternatively, access these pages using their Quickpath codes.

Fig. 4.1

Product Labels Options in Menu



Product Labels View

Existing product labels can be reviewed on their corresponding page. Both Classification Review Request and Classification Approval Request behave in the same way.

Fig. 4.2

Approval Requests Page

 A screenshot of the 'Approval Requests' page in the QAD software. The page has a blue header with 'QAD', 'Import Compliance Analyst', and dropdown menus for 'Pre-Entry' and 'Entry'. Below the header, the title 'Approval Requests' is displayed with a green pencil icon. The search panel includes filters for 'Import Country' (set to 'US - UNITED STATES'), 'Priority' (set to '>='), 'Assignee', 'Product', 'Description', and 'Status'. Below the search panel is a toolbar with 'Search', 'Update', and 'Settings' buttons. At the bottom is a table with the following data:

Product Code	Product Description	Priority	Assignee	Label Status	Note	Reporter
A2000002	Chicken Powder	High	QAITCADM	NEW	mo2	QAITCADM

The search panel at the top of the page enables you to filter results. Using the buttons in the toolbar, you can also update and delete existing labels.

Fig. 4.3

Update / Delete Buttons



To update a label, select a record in the grid and click the Update button.

Fig. 4.4

Product Import Commodity Classification Approval Request Window

The details in the grey fields on the left reflect the information supplied in the Classification Worksheet. These fields are read-only.

Click *Ok* to close the window and save the changes. Alternatively, click *Save* to save the changes and leave the window open.

Grid Buttons

You can interact with a record by selecting it and using the buttons directly above the grid.

Table 4.1

Product Import Buttons

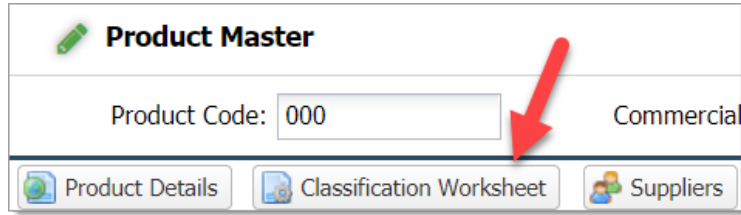
Button	Description
	Open the <i>Customs Details</i> window. Note Saving does not remove the label.
	Open the <i>Classification Worksheet</i> window. Note Opening the Classification Worksheet from the grid and saving - regardless of whether changes were made or not - removes the label. You may need to refresh the page. The Classification Worksheet behaves the same as in the Product Master.
	Increase/reduce priority.
	Assign to the current user.

Raising Labels

You can raise a product for review or approval on the Classification Worksheet.

Fig. 4.5

Classification Worksheet Button, Product Master



On the Classification Worksheet, click the *Review/Approval* button.

Fig. 4.6

Review/Approval Button



The *Review/Approval Request* window displays.

Fig. 4.7

Review/Approval Request Window

Fields highlighted in blue indicate a mandatory field.

For the *Request Type* field:

- If you select *Review*, the PCMR page opens.
- If you select *Approval*, the PCMA page opens.

Click *Submit* to close the window and save the changes. If an existing approval or request has been made for this product, an error pop-up displays to notify you.

Fig. 4.8

Review/Approval Request Window

You can update previous inputs for this product in the Review/Approval Request Window.

Click *Ok* to close the window and save the changes. Alternatively, click *Save* to save the changes and leave the window open.

Deleting Labels

Product Labels can be deleted in three ways, in addition to completing the Classification Process:

- Delete the product that is associated with the label on the Classification Worksheet.
- Delete the label from the relevant label portal using the *Delete*  button on the PCMA or PCMR page.
- Raising a different label type for a product (from Approval to Review). It is important to note that this method changes the format of a label and does not completely delete it.

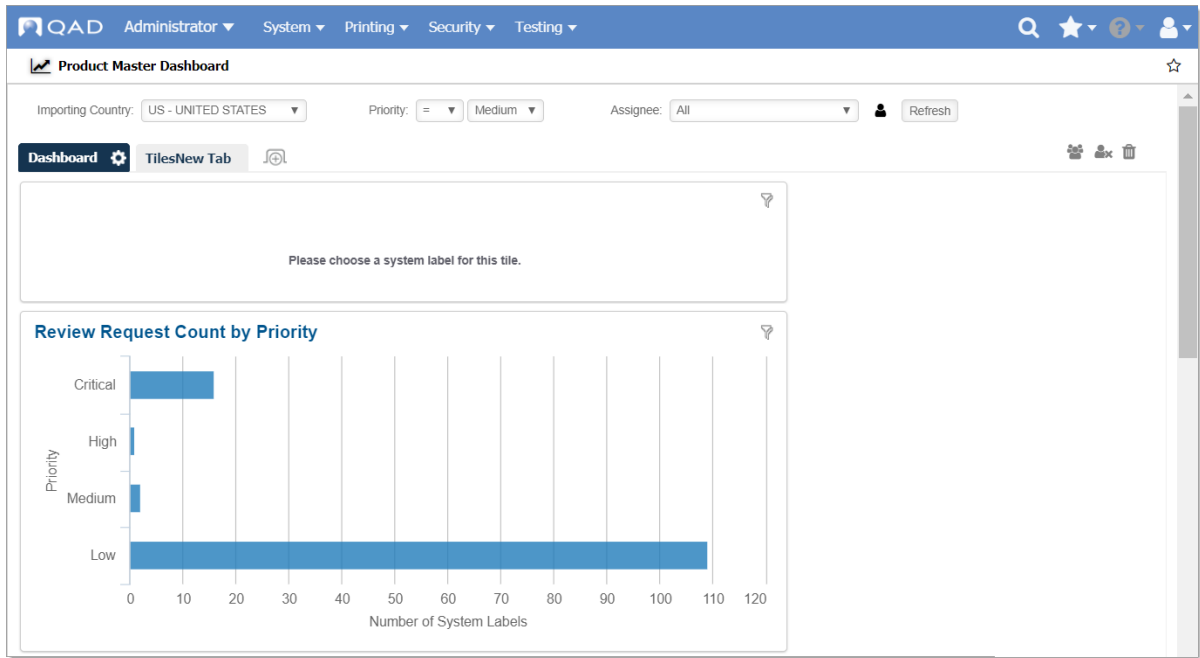
Product Master Dashboard (Label Dashboard)

The Product Master Dashboard is used for analytics and allows quick access to review labels.

The Product Master Dashboard can be accessed in 2 ways:

- Access option ANPRM.
- Select the *Jump to Dashboard*  icon in the PCMA or PCMR window.

Fig. 4.9
Product Master Dashboard

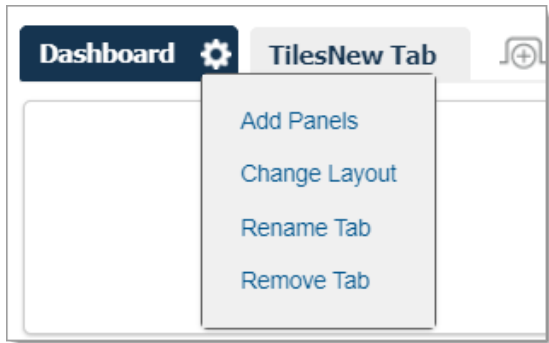


Tabs and Panels

The dashboard can be divided into tabs, which are displayed horizontally along the top of the page. By default, the first tab displays the name of the dashboard that you are currently on. This tab is labelled *Dashboard*.

Tabs are especially useful if there are a lot of panels that you want to organise. To add a panel in the selected tab, click the cog icon on the tab and select *Add Panels*.

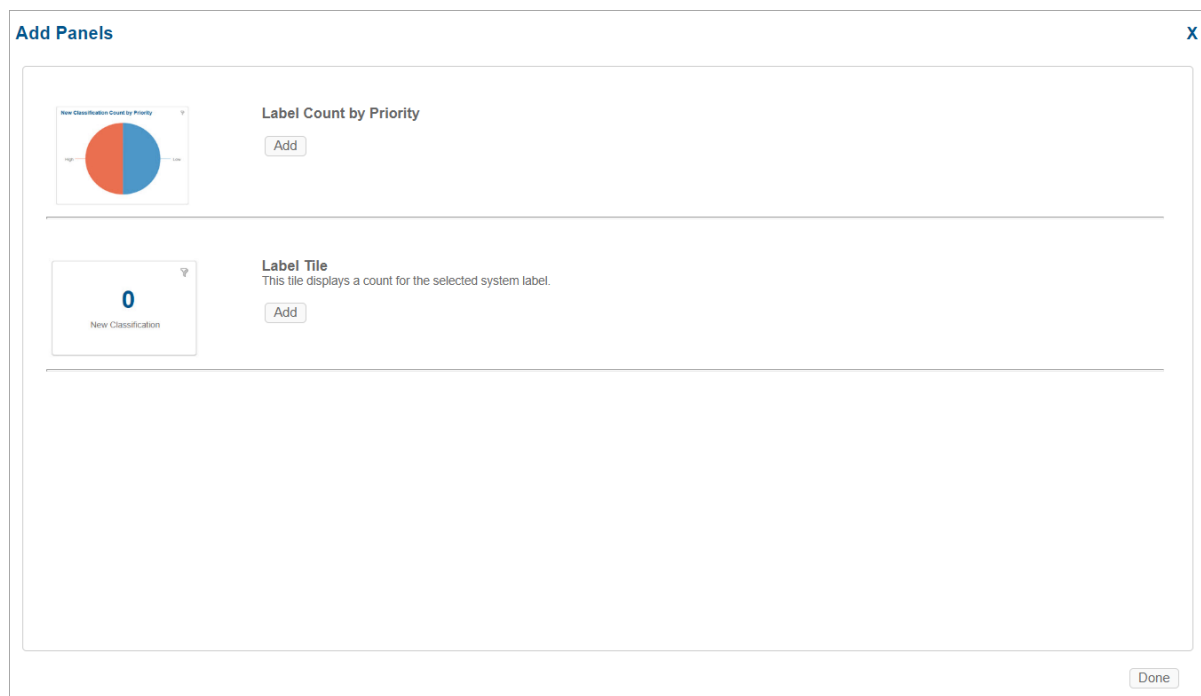
Fig. 4.10
Tab Menu



The *Add Panels* Window displays, containing the two panel options that are available for product labels; *Label Count by Priority* and *Label Tile*.

Fig. 4.11

Add Panels Window



The *Add Panels* window also displays if you choose to add a new tab to the dashboard by clicking the *New Tab*  button.

The *Label Count by Priority* panel enables you to view the total number of review or approval requests according to their priority; Low, Medium, High, or Critical. The *Label Tile* panel displays the total of the selected system label.

To add a panel to the dashboard, click the *Add* button. You can add the same panel more than once. Then click *Done*.

Click the *Settings*  button on a panel to configure it. Then select *Edit* to open the *Edit* window.

Fig. 4.12

Edit Window, Label Tile Panel



Fig. 4.13

Edit Window, Label Count by Priority Panel

Using the drop-down fields in this window, you can specify the label type that is represented in the panel. For the *Label Count by Priority* panel, you can also choose how the panel data is displayed; in a bar chart and or a pie chart. Click *Done* to save the settings.

At the top of the dashboard, you can use the fields provided to filter the panel data; for example, by importing country, priority, and assignee.

Fig. 4.14

Dashboard Filters

In the *Priority* field, you can specify that you want to view data for labels that are assigned:

-  A priority that is lower than or equal to Low, Medium, High, or Critical.
-  Either Low, Medium, High, or Critical priority.
-  A priority that is higher than or equal to Low, Medium, High, or Critical.

The *User*  button updates the value in the *Assignee* field to the user account that you are currently logged in as.

After applying a filter, click *Refresh* to view the updated panel data.

Drill Down

To view a detailed breakdown of the data that is represented, you can drill down by clicking various elements in the panels.

In the case of the *Label Tile* panel, clicking the total number opens a page that corresponds to the selected label:

- The Approval Request label type opens the *Approval Requests* page.
- The New Classification label type opens the *New Classification* page.
- The ERP Classification Review label type opens the *ERP Classification Review* page.
- The Review Request label type opens the *Review Requests* page.



- The HTS Update Review label type opens the *Product Labels - Review* page.

To drill down from the *Label Count by Priority Panel* panel, click the bar or pie segment of interest. This opens the corresponding page, as explained above, with the addition of a *Priority* filter. For example, if the label type is *Review Request* and you click the bar or pie segment labelled *Critical*, the *Review Requests* page opens with the *Priority* filter configured to $\geq$ *Critical*.

Note Your administrator can configure settings for the Product Master Dashboard.



Chapter 5

Administration

This section describes how to configure supplier details, purchase order assignees, and the API log.

Supplier Details

Describes how to update supplier details in the Imports Admin Maintenance Portal.

Assigning Purchase Orders

Describes how purchase orders are assigned to users.

API Log

Describes how to review and audit API messages that are received.



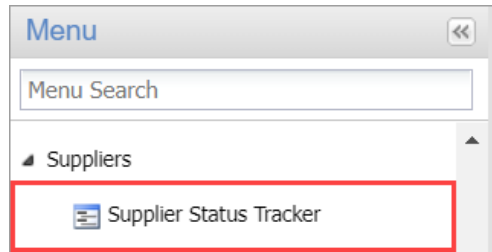
Supplier Details

The *Line Details* task contains a *Supplier Details* area. To maintain supplier details, access the Imports Admin Maintenance Portal (QuickPath code ITCC), or by using the dashboard as an Import System Admin to open the Imports Admin Maintenance Portal.

Under the *Suppliers* area in the menu on the left, click *Supplier Status Tracker*. The grid refreshes to display supplier records.

Fig. 5.1

Supplier Status Tracker Menu Option



All records on this page have a corresponding partner record, which can be found on the *Partners* page, QuickPath code NR.

These records can be created manually or by ERP. Regarding ERP:

- If a partner record matches that on an incoming ERP, the partner record is then updated and a role is added to that corresponding with the ERP.
- If a partner record does not match that on an incoming ERP, a new record is created and a role is added to that corresponding with the ERP.

Next, the system checks the Supplier Status Tracker to see if a record matches that of the ERP. If not, a record is created. Otherwise, the existing record is used.

Note Depending on the system configuration, ERP data may overwrite existing system data regarding partners.

Double-click a record in the *Supplier Status Tracker* grid, or select one and click the *Update Record*

 button to update the details. As shown in the image below, certain fields are highlighted in grey. This indicates that the information is retrieved from the supplier record and is read-only in the ITCC portal. However, the details in the remaining fields can be updated.

Fig. 5.2

Update Supplier Status Tracker Record

The screenshot shows the 'Supplier Status Tracker' form with the following fields and values:

- * Supplier:** QAI_PARTNER_01
- Supplier Number:** QAI_PARTNER_01 NUMBER
- Address:** [Redacted]
- Contact Name:** [Redacted]
- Contact Email:** [Redacted]
- Contact Phone:** [Redacted]
- Alternative Supplier No:** QAI_PARTNER_01
- Manufacturer:** QAI_PARTNER_01
- Supplier Type:** FRANCHISE
- Supplier Division:** US
- Pre-Alert Status:** NO_ALERT
- Consolidation Supplier:** ☒
- Active Supplier:** ☒
- Related Party:** ☒
- Comments:** [Redacted]
- SOP Status:** IN_PROGRESS
- SOP Version:** V1
- New SOP Sent Date:** 06/10/2020
- Last Follow-Up Date:** 09/10/2020
- SOP Received Date:** 09/10/2020
- SOP Pre-Approved:** ☒
- Supplier IOR Type:** [Redacted]
- Supplier IOR Detail:** [Redacted]
- Importer Of Record:** [Redacted]
- Route:** [Redacted]
- Route Comment:** [Redacted]
- Assigned Owner:** QAITCAU2
- Buttons:** View Attachments, Save, Close

After updating the necessary details, click *Save*.

To create a new record, click the *Create*  button in the toolbar of the Supplier Status Tracker grid.

Fig. 5.3

Create New Supplier Status Tracker Record

The *Supplier* field lookup displays existing partner records. After you select a supplier, the *Supplier Number*, *Address*, *Contact Name*, *Contact Email*, and the *Contact Phone* fields may populate automatically.

After completing the fields, click *Save* to create the supplier.

Assigning Purchase Orders

When a purchase order is received and appears in Workflow, it is automatically assigned to a user depending on how your system is configured. Certain user assignment processes take precedence over others. This hierarchy is detailed below in descending order:

1. Assigned user set on Supplier Status Tracker
2. Assigned user set on Supplier Assignee Grouping
3. Assigned Importer of Record (IOR) and Buyer Assignee
4. Assigned user set on Supplier Alphabetical Assignee
5. Default user set on Imports Configurator

Assigned User Set on Supplier Status Tracker

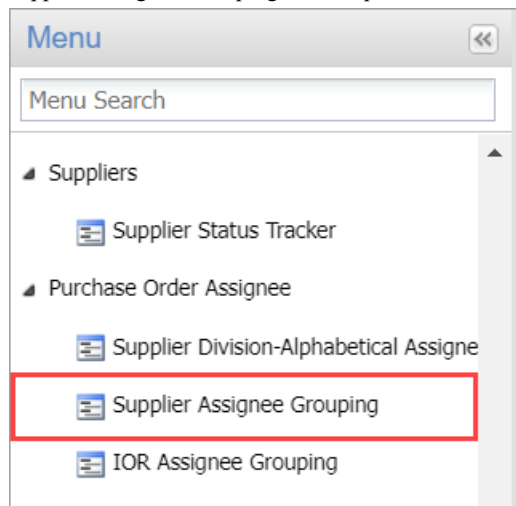
In the *Supplier Status Tracker* window, the *Assigned Owner* field is used to specify a user. This is the default assigned user for the supplier.

Assigned User set on Supplier Assignee Grouping

Under the *Purchase Order Assignee* area in the ITCC portal menu, the *Supplier Assignee Grouping* option enables you to assign multiple suppliers to a single user.

Fig. 5.4

Supplier Assignee Grouping Menu Option



Specify a supplier group in the *Group Code* field. All suppliers in this group will be assigned to the selected user in the *Assigned To* field.

Click *Save* to save the supplier assignee grouping.

Fig. 5.5

Create Supplier Assignee Grouping Window

A screenshot of a window titled 'Create Supplier Assignee Grouping'. It contains three input fields: 'Group Code' (with a red asterisk), 'Description' (with a red asterisk), and 'Assigned To' (with a magnifying glass icon). At the bottom left is a 'Save' button with a green checkmark icon, and at the bottom right is a 'Close' button with a red X icon.

Updating Supplier Groups

To add a supplier to a supplier group:

1. Click the configuration button in the *Supplier Assignee Grouping - Suppliers* column of the relevant record. The *Supplier Assignee Grouping - Suppliers* window displays.

Fig. 5.6

Supplier Assignee Grouping - Suppliers Button

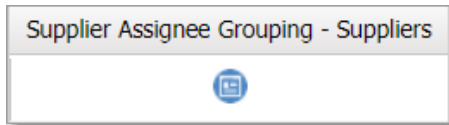
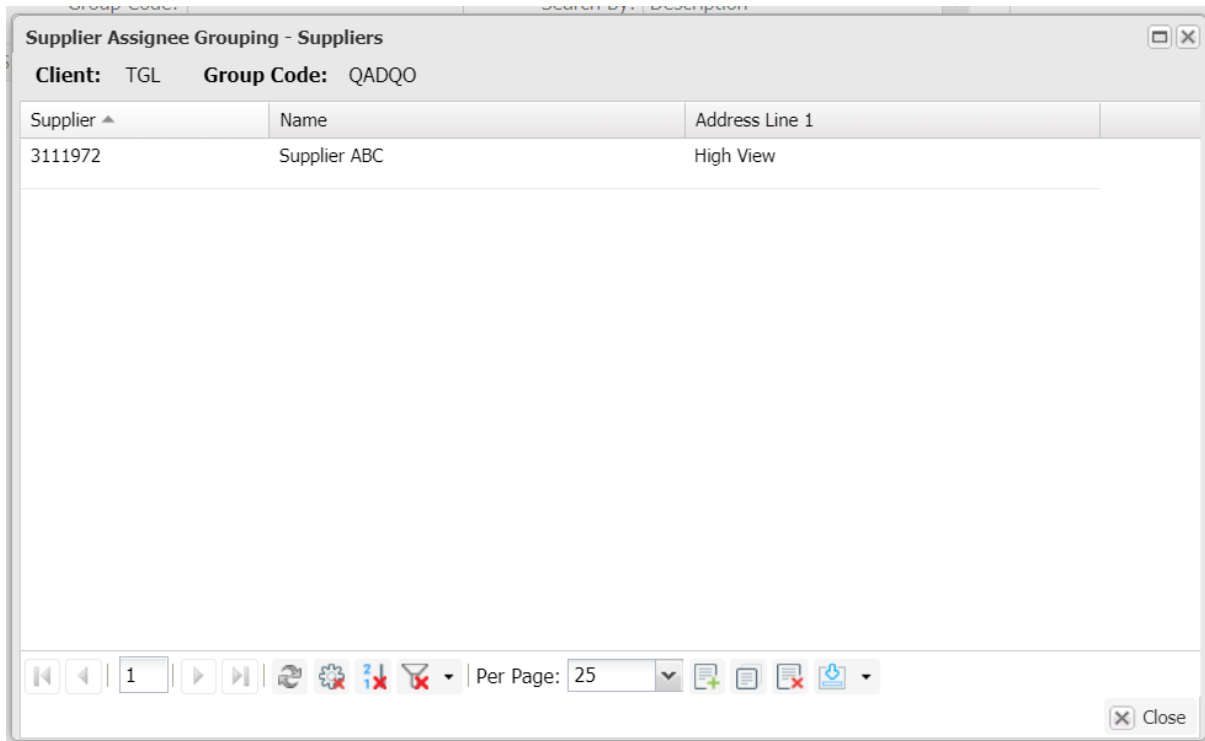


Fig. 5.7

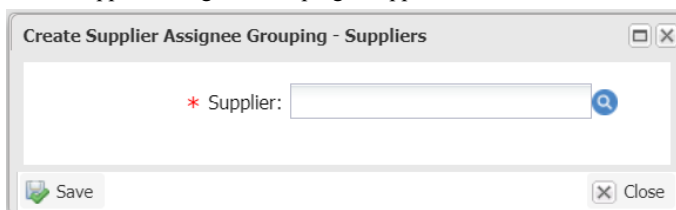
Supplier Assignee Grouping - Suppliers Window



2. Click the *Create*  button in the toolbar. The *Create Supplier Assignee Grouping - Suppliers* window displays.

Fig. 5.8

Create Supplier Assignee Grouping - Suppliers Window



3. The *Supplier* field lookup presents all partners in the database. Select the partner that you want to add to the group and click *Save*. It is possible to add multiple records.

Note The record that you select must have an assigned role of Supplier. Otherwise, choosing a partner with a different role prompts an error.

To remove a supplier from a group, access the *Supplier Assignee Grouping - Suppliers* window as described above. Select the supplier in the list and then click the *Delete*  button in the toolbar.

Assigner Importer of Record (IOR) and Buyer Assignee

On the Supplier Status Tracker, the supplier importer of record (IOR) type can determine the user assignee. This is configured in the *IOR Assignee Grouping* menu option.

IOR Assignee Grouping is used to assign an IOR type to a particular user. When creating an IOR Assignee Grouping record, use the *IOR Type* field to indicate the applicable record type.

The value in the *Assigned To* field specifies the user to which the purchase order is assigned.

Fig. 5.9

Create IOR Assigning Grouping

Assigned User Set on Supplier Division-Alphabetical Assignee

Supplier Division-Alphabetical Assignee is used to link the first letter or number of a supplier to a user.

For example, purchase orders that begin with A-C can be assigned to User 1, and purchase orders that begin with D-F can be assigned to User 2, and so on. This behaves the same way in the case of numbers 0-9.

Similarly, if a supplier's name is ExampleSuppliers12345, it is allotted to users who are assigned to supplier names that begin with the letter E.

Default user set on Imports Configurator

If the above conditions do not apply to a supplier, it is possible to assign a default user.

Access the *Imports Configurator* page, QuickPath code CFGITC. Click the *ITC Global Settings* tab.

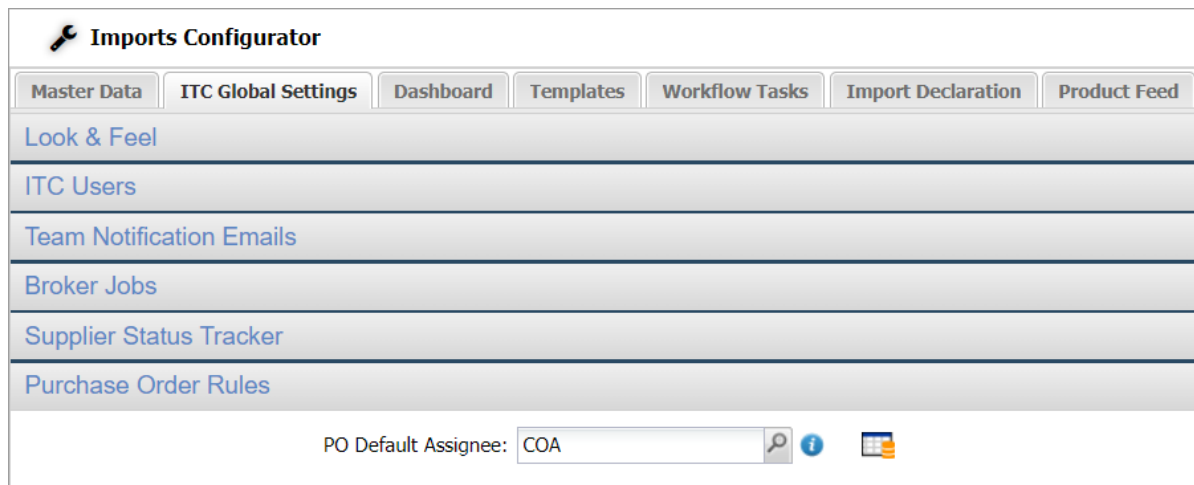
Fig. 5.10

Imports Configurator, ITC Global Settings Tab

Scroll down to the *Purchase Order Rules* area. Here, you can assign a default user using the *PO Default Assignee* lookup field provided. After specifying a user, click the *Save* button at the bottom of the *Imports Configurator* page.

Fig. 5.11

Purchase Order Rules Area



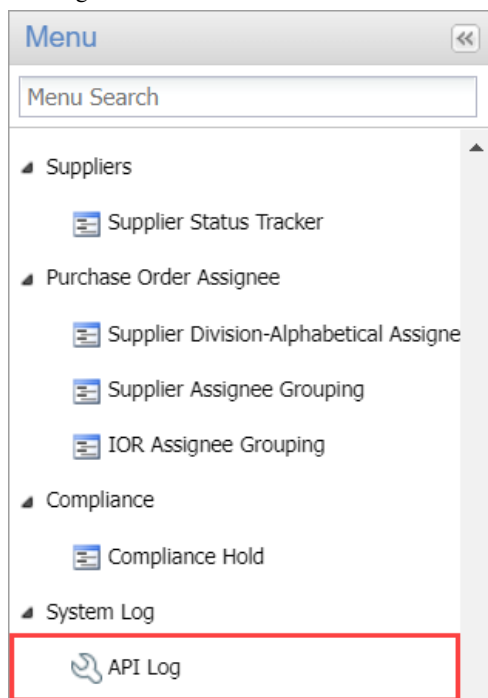
API Log

The API Log in the ITCC portal enables you to review and audit API messages that are received.

Under the *System Log* area in the menu on the left, click *API Log*. from the menu. This is where the message details are reviewed.

Fig. 5.12

API Log in Menu



The records in the *API Log* grid are read-only.

The *Request Type* column indicates the type of message. *Valid Request* indicates whether the parameters on the message were accepted. If accepted, a green check mark is displayed.



Product Information Resources

QAD offers a number of online resources to help you get more information about using QAD products.

[QAD Forums \(community.qad.com\)](https://community.qad.com)

Ask questions and share information with other members of the user community, including QAD experts.

[QAD Knowledgebase \(knowledgebase.qad.com\)*](https://knowledgebase.qad.com)

Search for answers, tips, or solutions related to any QAD product or topic.

[QAD Document Library \(documentlibrary.qad.com\)](https://documentlibrary.qad.com)

Get browser-based access to user guides, release notes, training guides, and so on; use powerful search features to find the document you want, then read online, or download and print PDF.

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*Log-in required

