TUTORIAL TO CAPTURE A SHIPMENT

SmartAdmin

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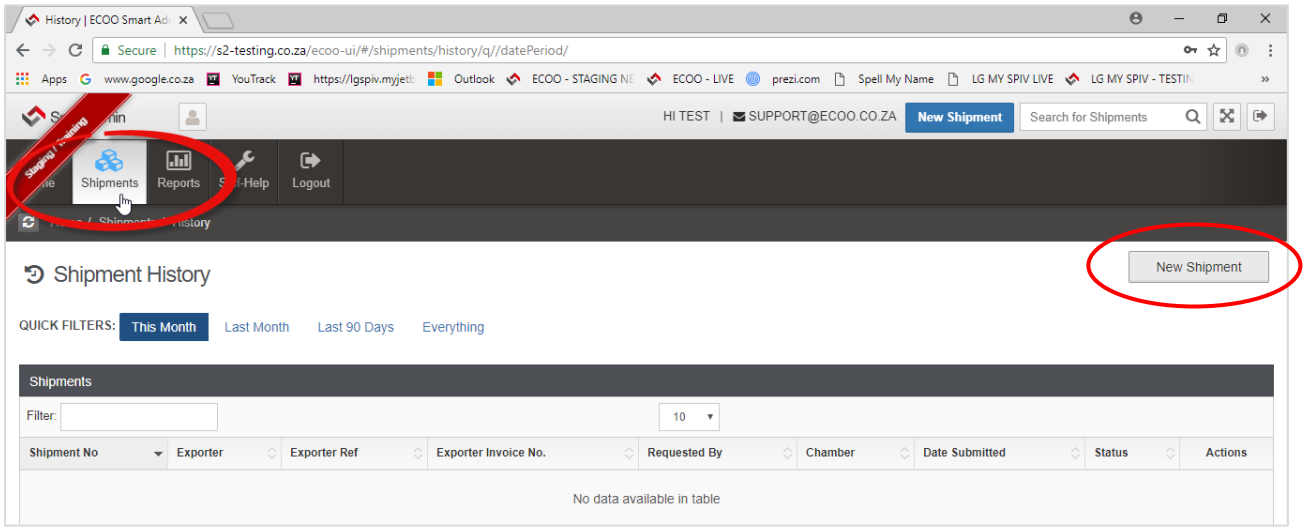
NEW SHIPMENT

Once Logged in and on the dashboard / home page. If you click on the “Shipments” Icon the following screen appears:



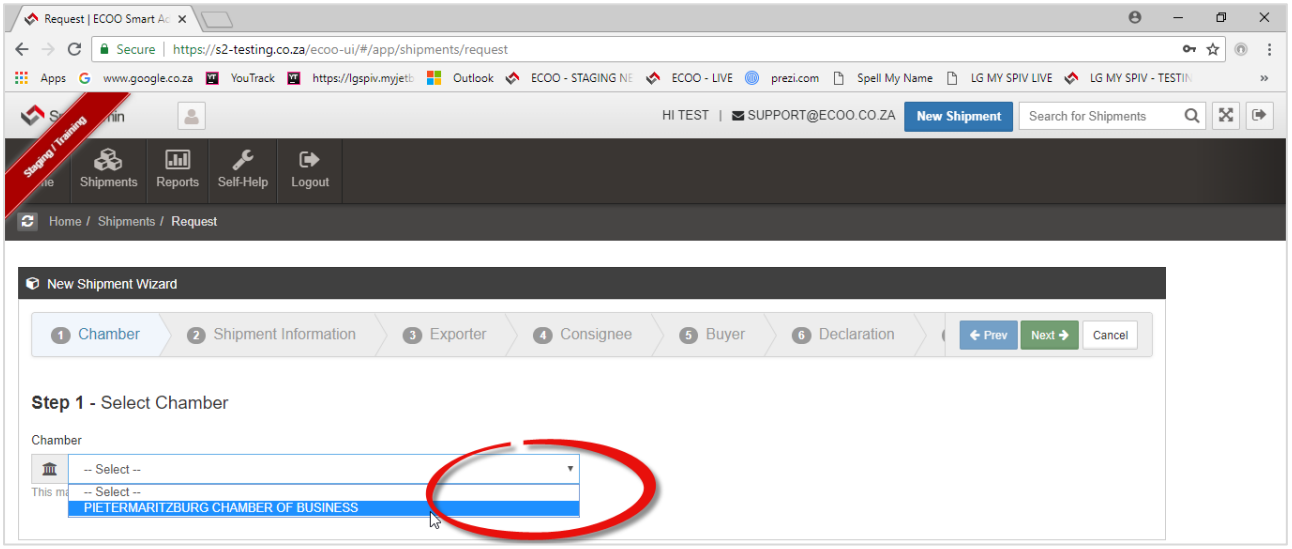
The Quick Filters to view all your Shipments defaults to ”THIS MONTH” click on any of the others to view “LAST MONTH” “LAST 90 DAYS” or “EVERYTHING”

1. PREPARE NEW SHIPMENT:

Click on the New Shipment Button in the screenshot above. The following Wizard opens and you will start to capture your shipment information

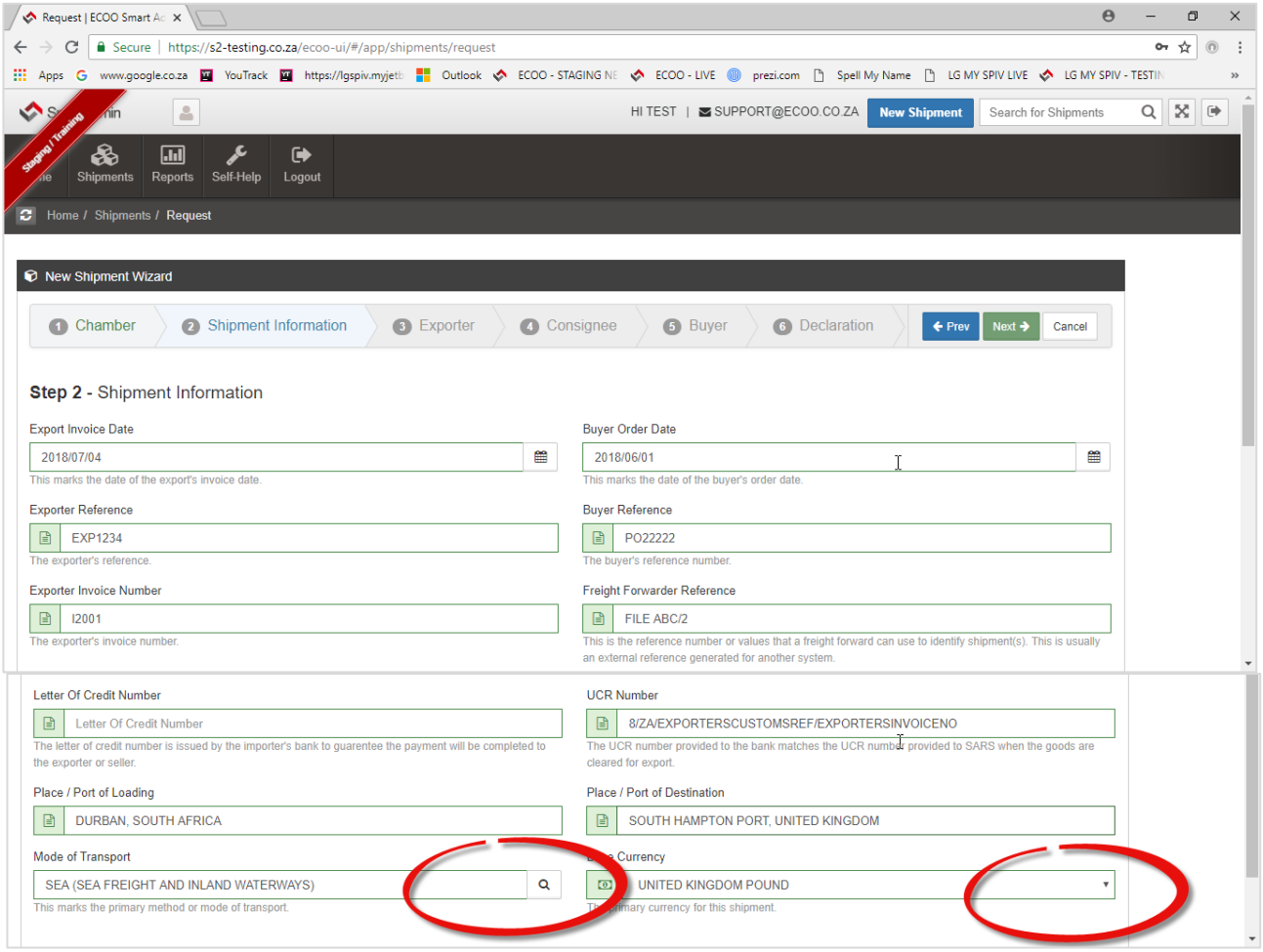
1.1 SELECT CHAMBER

Select the Chamber you are affiliated to. Click next to progress through each step.



1.2 SHIPMENT HEADER INFORMATION

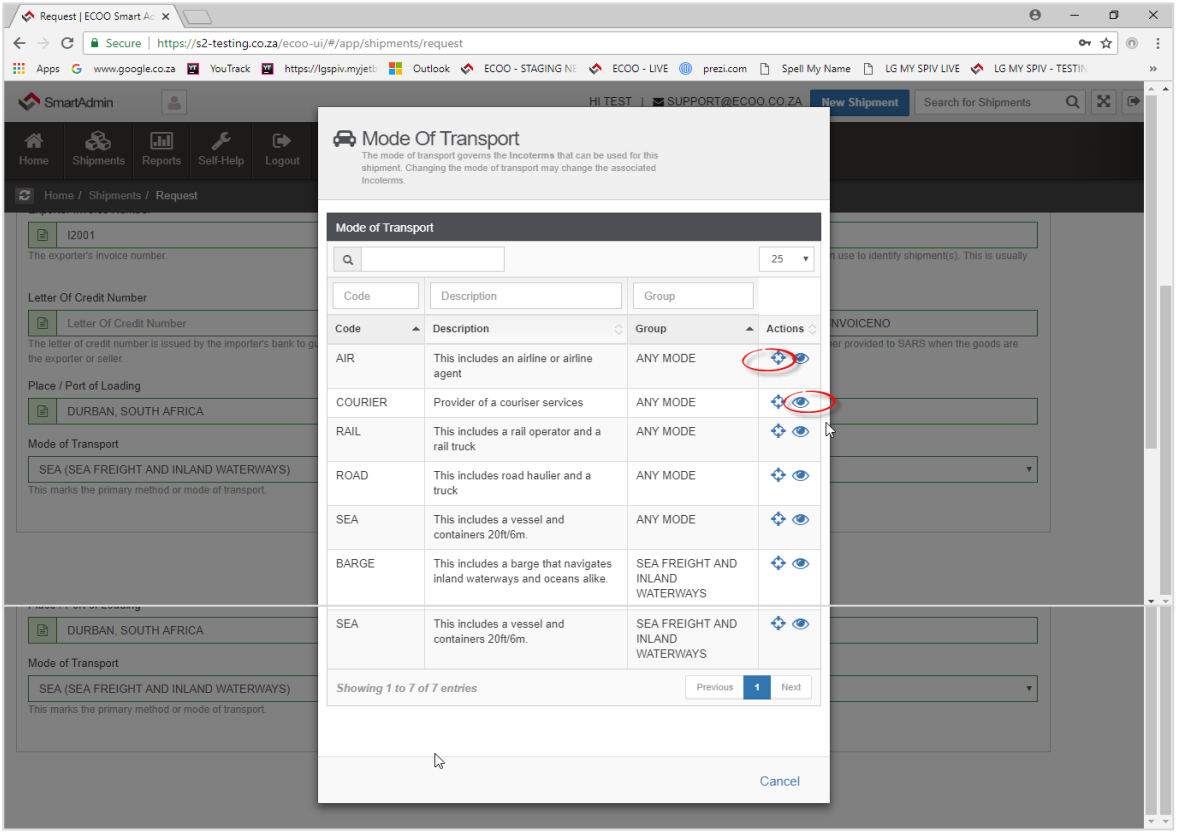
The Shipment Widget opens and you will complete the Shipment form as shown below.



Base Currency is selected by clicking on dropdown menu circled above.

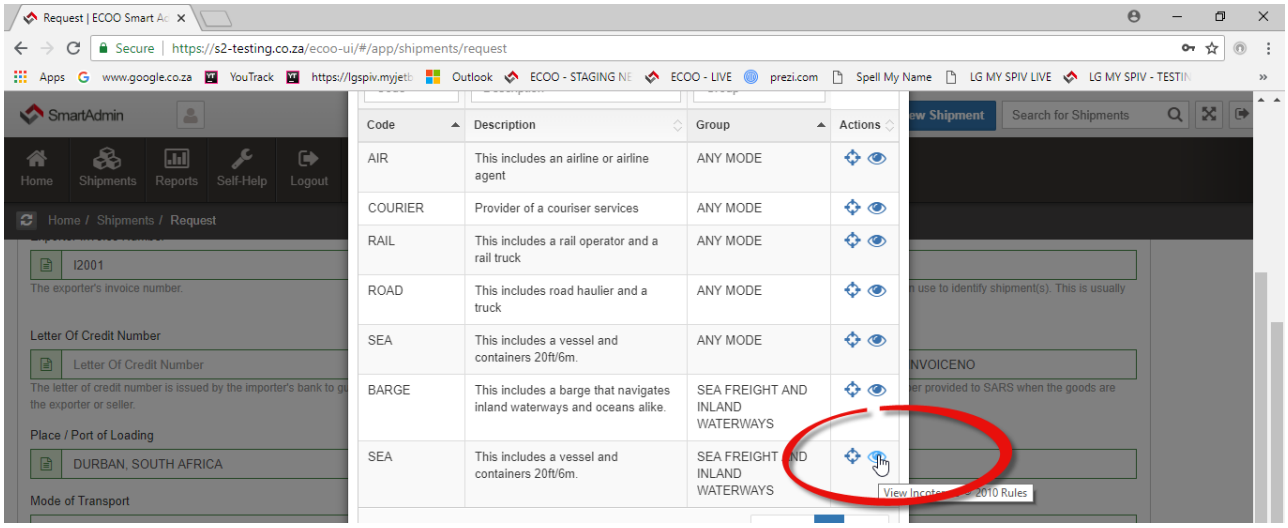
Mode of Transport is selected by clicking on the “Search” Icon encircled above.

a) Click on the Search Icon and the following sub-menu appears:



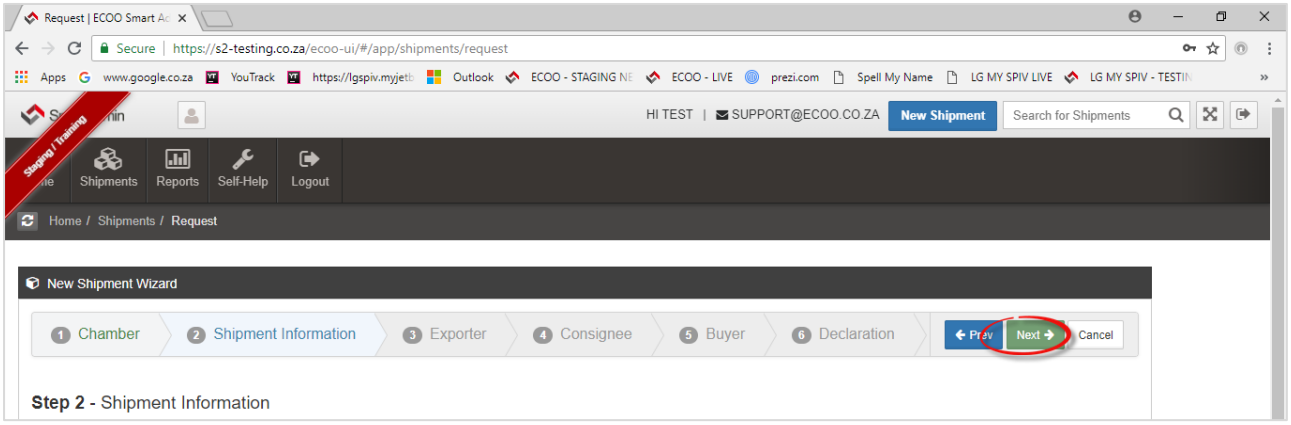
NOTE: The “Crosshair” selects the Mode of Transport and the “Eye” will give you more information on the Incoterm itself. (See both icons encircled in the screenshot above.)

b) Click on the “Eye” to see the Incoterms affiliated to the Mode of Transport you have selected: (Sea – Sea Freight and Inland Waterways)



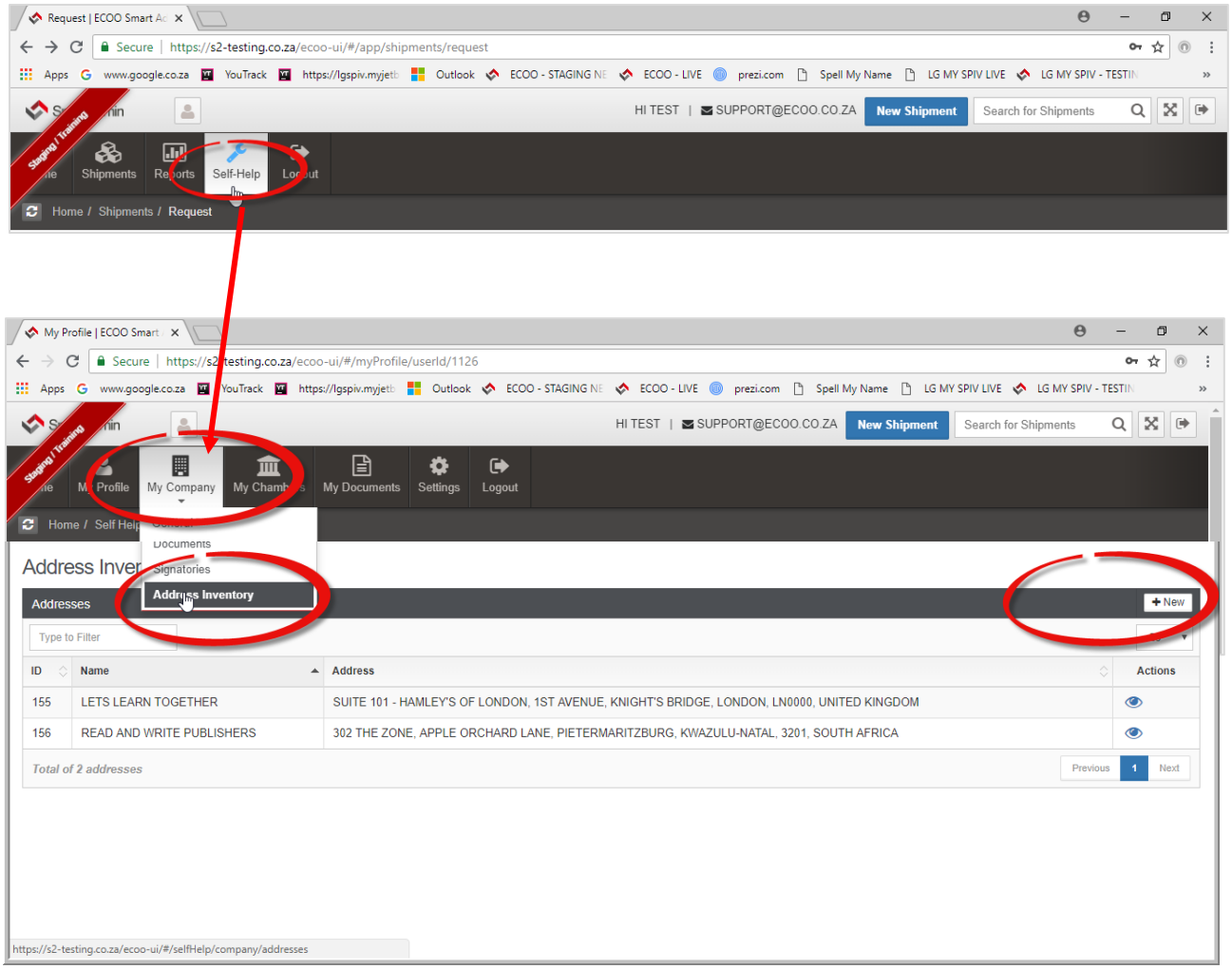
c) The following screen appears and you can view the Incoterms relevant for Sea Freight and Inland Waterways: (If the Incoterm is not found on this mode of transport, then go back and change to Sea (Any Mode) (You can also click on the “View Diagram” at the bottom of the screen for a diagram of the Incoterm.)Click “Close” Close, and Cancel when done in order to get back to the “Shipment” Widget.

Click ‘Next’ to progress to Step 3 of the wizard:

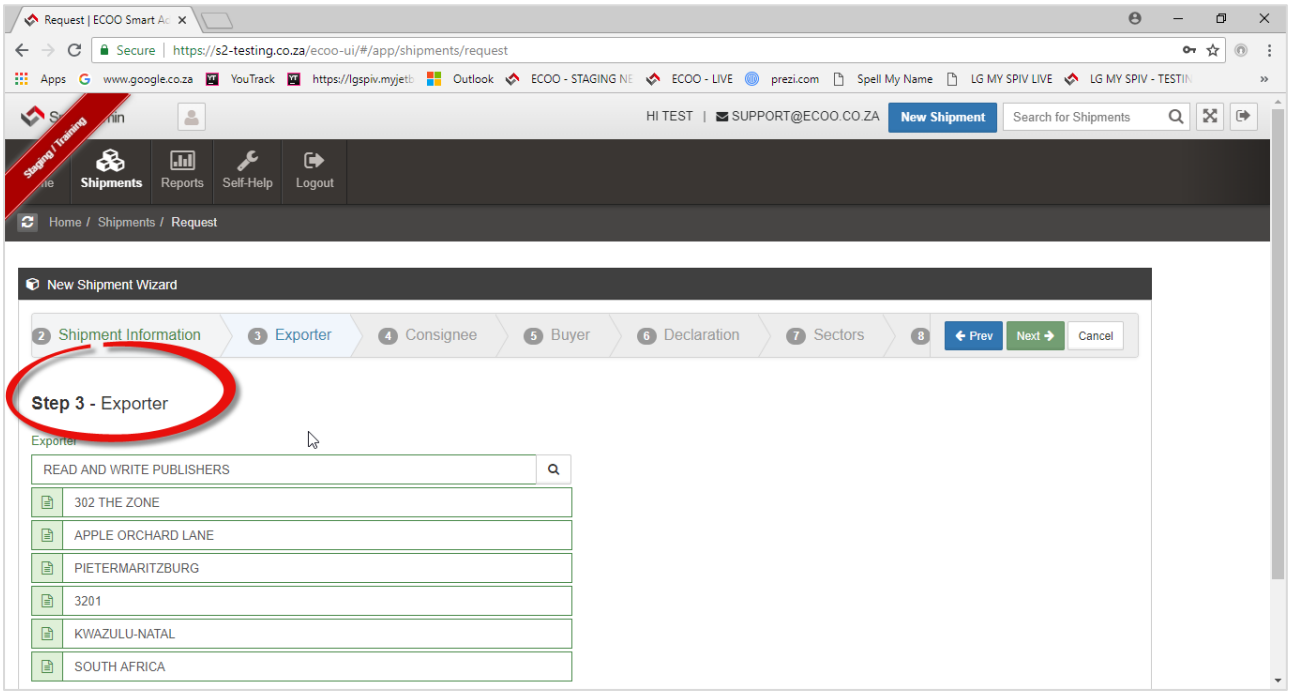


1.3 EXPORTER DETAILS

Enter the Exporter's Details. (If you click on the "Search" button encircled, you will be taken to the Address Library for your company. If you complete the Exporter's Details there, then in future you go fetch the Address and it will put it into the fields for you. All users within the Company can share this address library. Note that it is a copy and paste feature, so if you need to edit anything within a specific shipment you can copy it across and edit it in the Shipment only. If there is a permanent change to the Exporter's details, you will edit the information in the actual Address Library. (Address Library is accessed at any time by going to "Self-help" and then selecting "My Company" from the next Menu Bar and then selecting "Address Inventory."

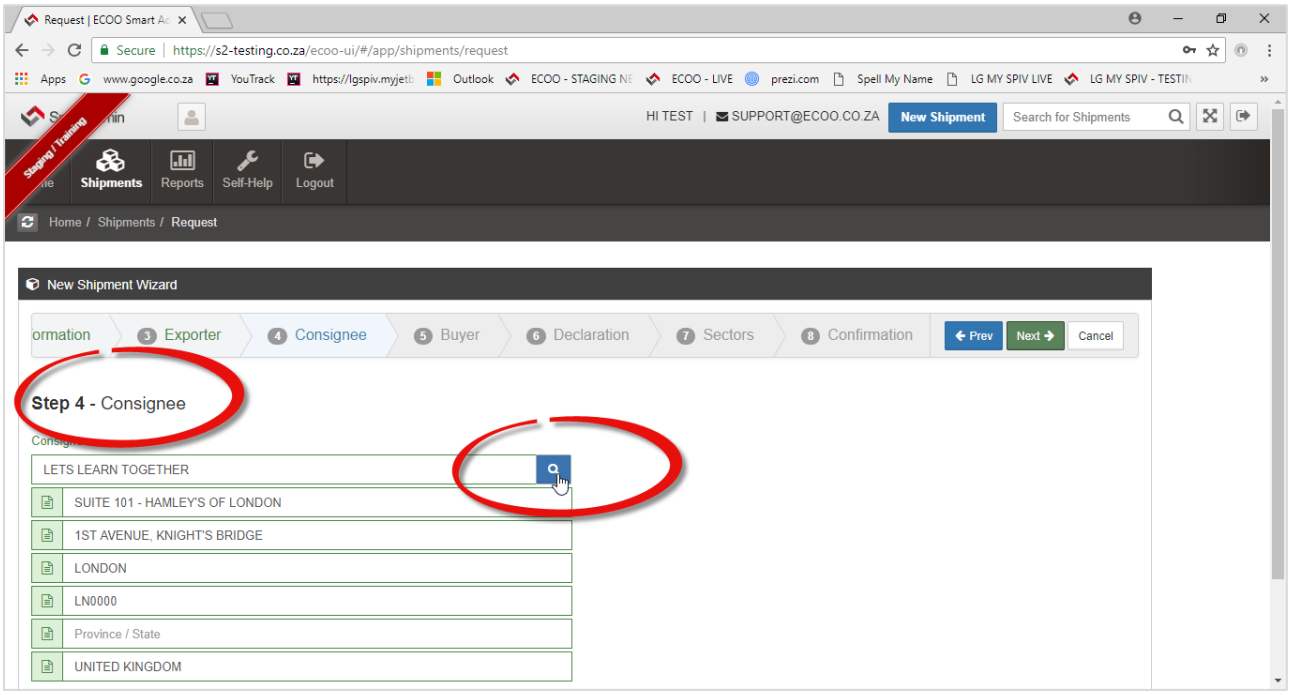


Back to Step 3 of the Shipment: Enter the Exporter's information (search Address library or enter manually) Click NEXT to proceed to Step 4: Consignee's information.



1.4 CONSIGNEE DETAILS

Enter the Consignee's information (search Address library or enter manually)



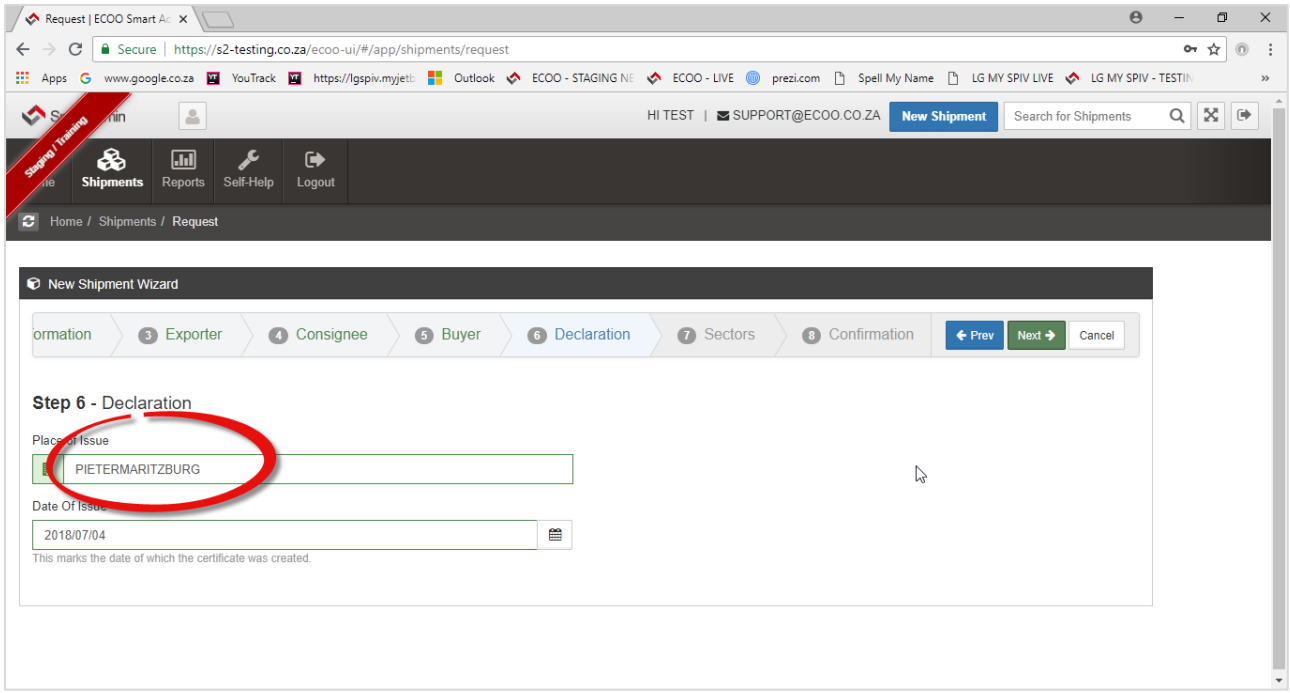
1.5 BUYER DETAILS

Enter the Buyer's information if different to Consignee's info (search Address library or enter manually

1.6 DECLARATION

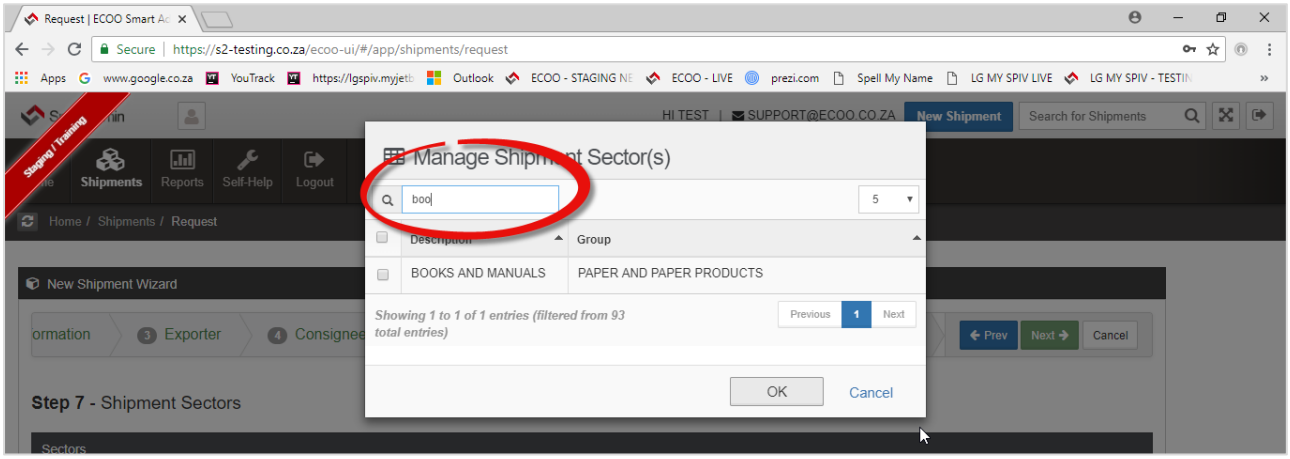
Enter the Place of the Business Chamber approving your Certificate of Origin.

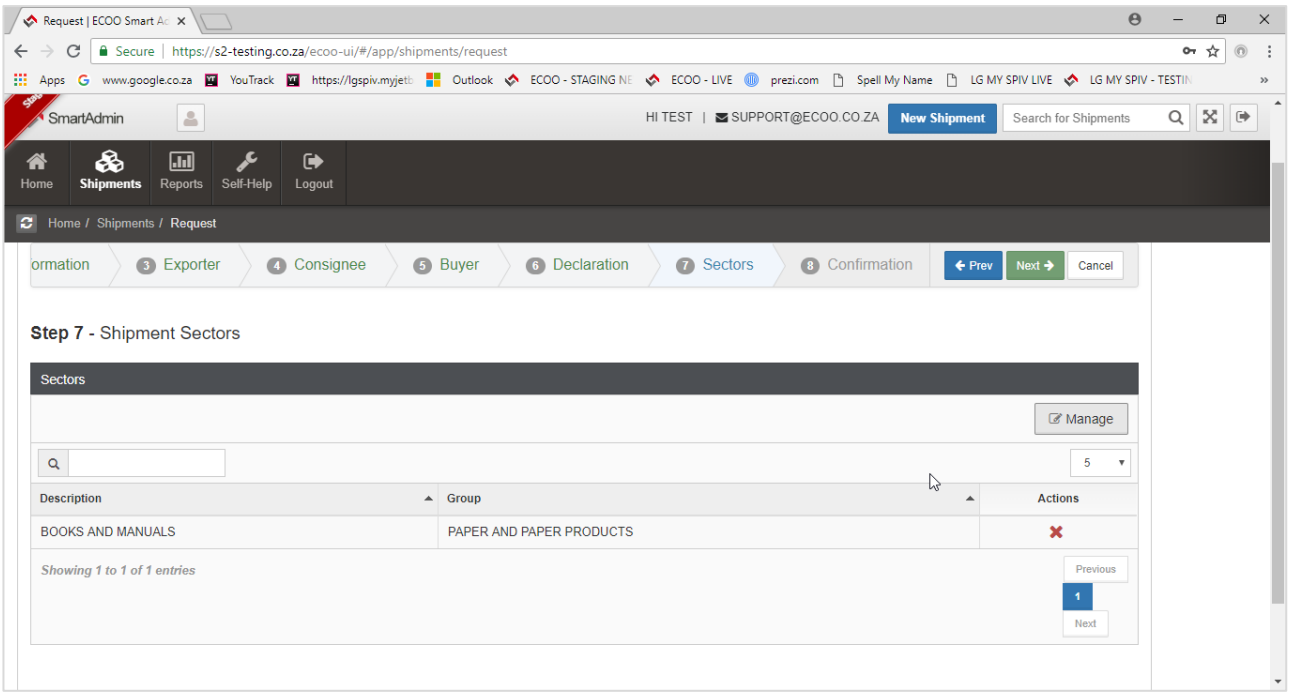
The date is driven by the system and cannot be changed.



1.7 SELECT SECTOR(S)

(This is a government request for Chambers to provide export analysis for them). If you cannot find the sector, please select "No Classification". (Also a nice to have for reporting purposes.)(Also note, you may add more than one sector if more than one in the shipment. – Just click on "Manage" sector to select additional sectors.)

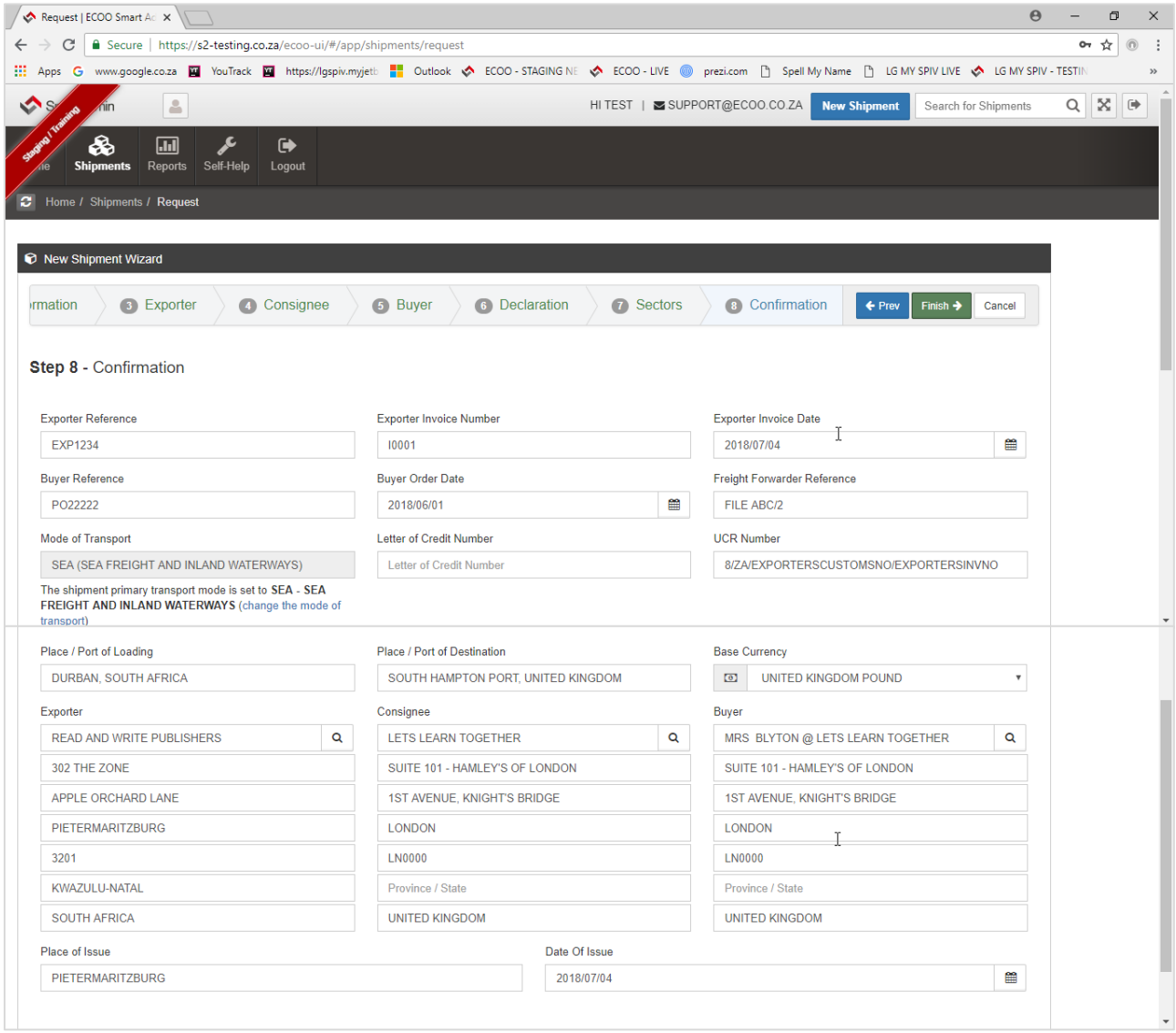




Click on NEXT to progress to Step 8.

1.8 CONFIRMATION

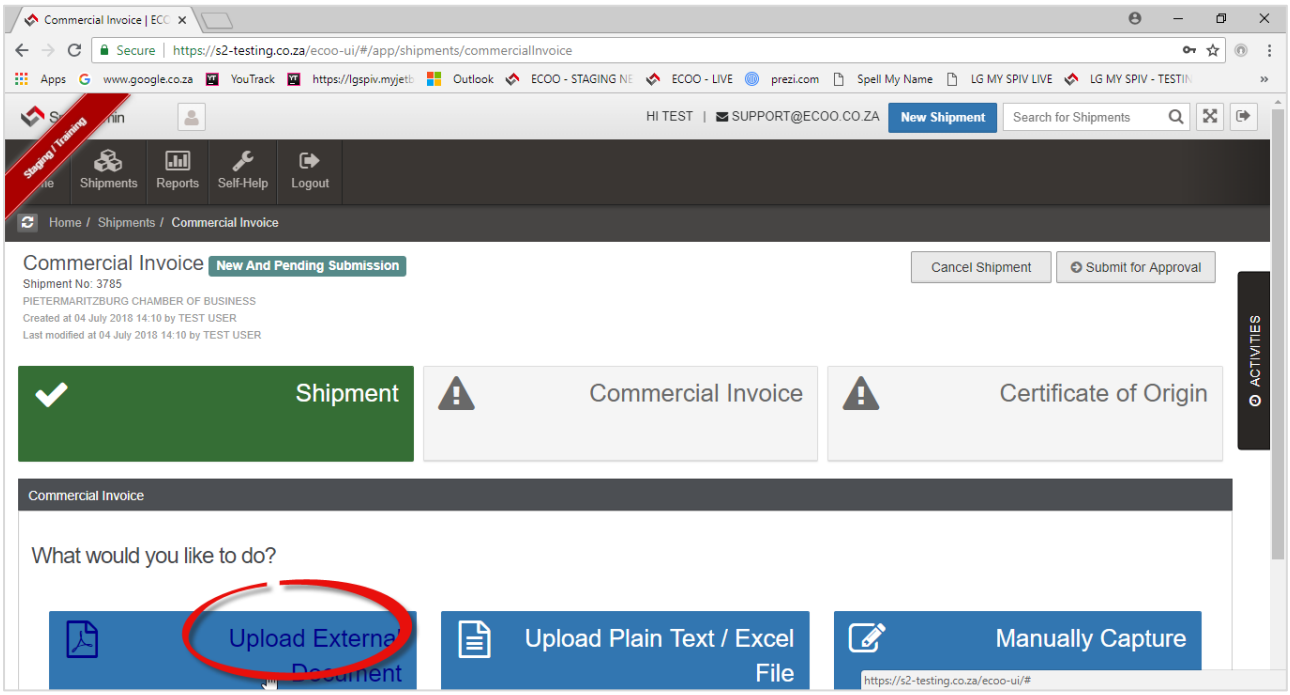
Confirmation of Shipment information: (Please note if any information is incorrect, you are able to edit on this screen instead of going to previous screens to correct.) Once you are happy with the information, click on FINISH to progress to the next widget i.e. THE COMMERCIAL INVOICE.



EDIT SHIPMENT

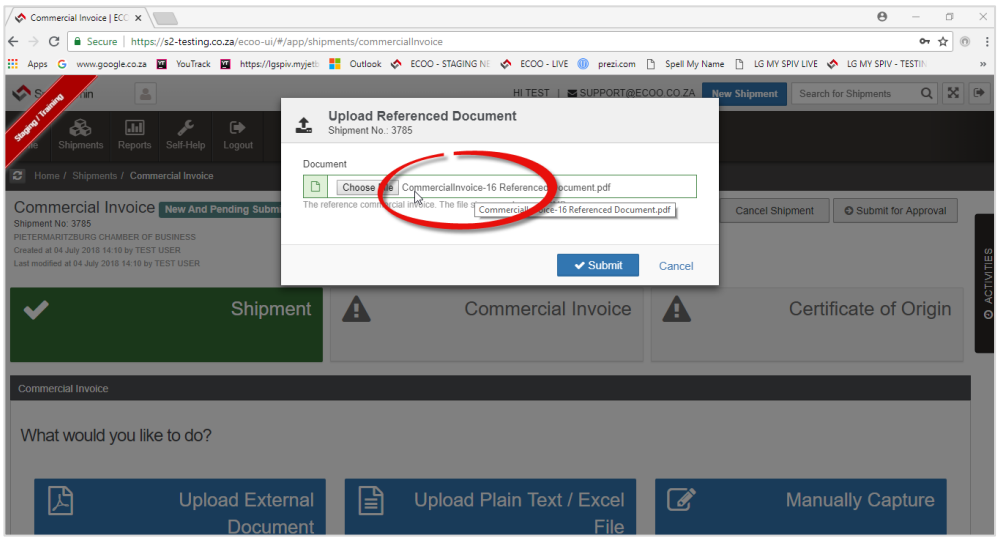
2. ADD COMMERCIAL INVOICE

Notice the Shipment you have just created now has a reference number (Shipment No. 3785) encircled below. (A good idea is to click on SAVE button before proceeding to capture the Commercial Invoice. Click on the Commercial Invoice Widget encircled below:

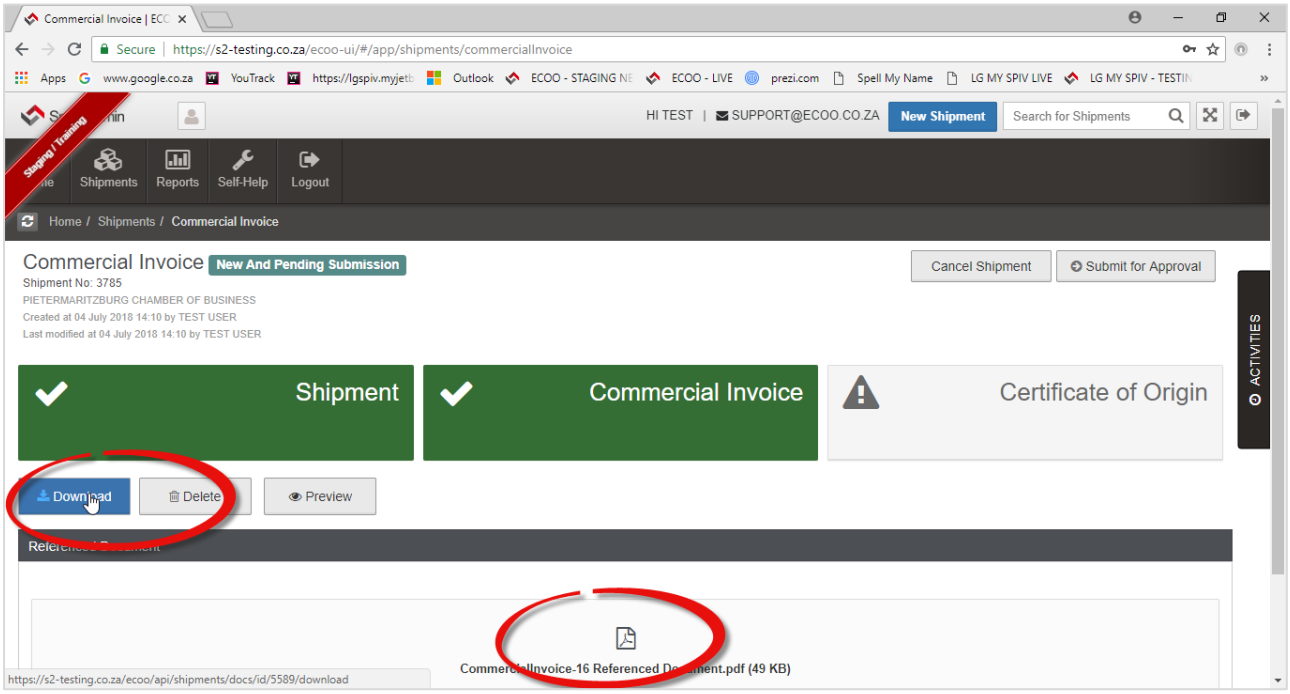


The Widget opens and you will be given options as to what you want to do. Most freight forwarders will upload the Exporter's Invoice which you will save and upload as a .pdf file only. (No Word documents will be uploaded.)

To upload the Commercial Invoice as a .pdf file – Click on the Upload External Document encircled above then browse for the file on your computer and Press Submit.



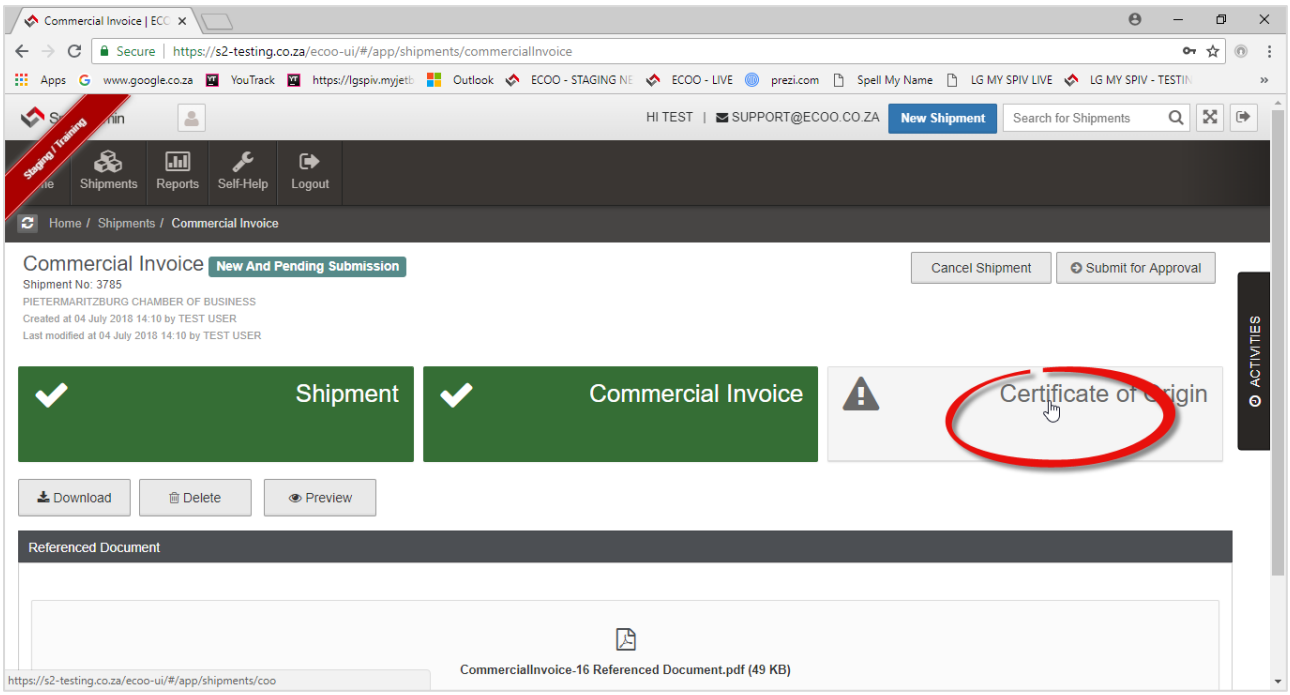
Notice the downloaded file encircled below and also notice the Download button encircled as well. The Chamber will download this Commercial Invoice to compare it with you Certificate of Origin:



Next you are going to capture your Certificate of Origin.

3. ADD CERTIFICATE OF ORIGIN

Click on the Certificate of Origin Widget:



Most Freight Forwarders will either:

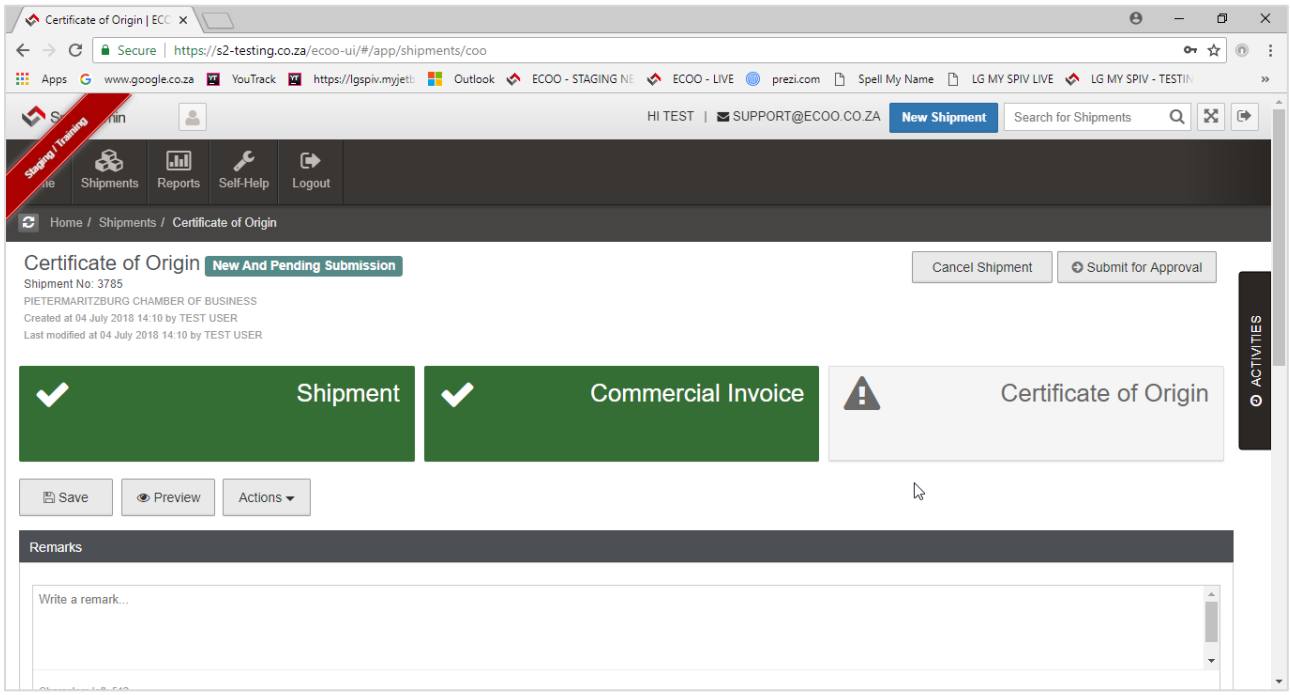
a) Capture the Certificate of Origin Manually, or

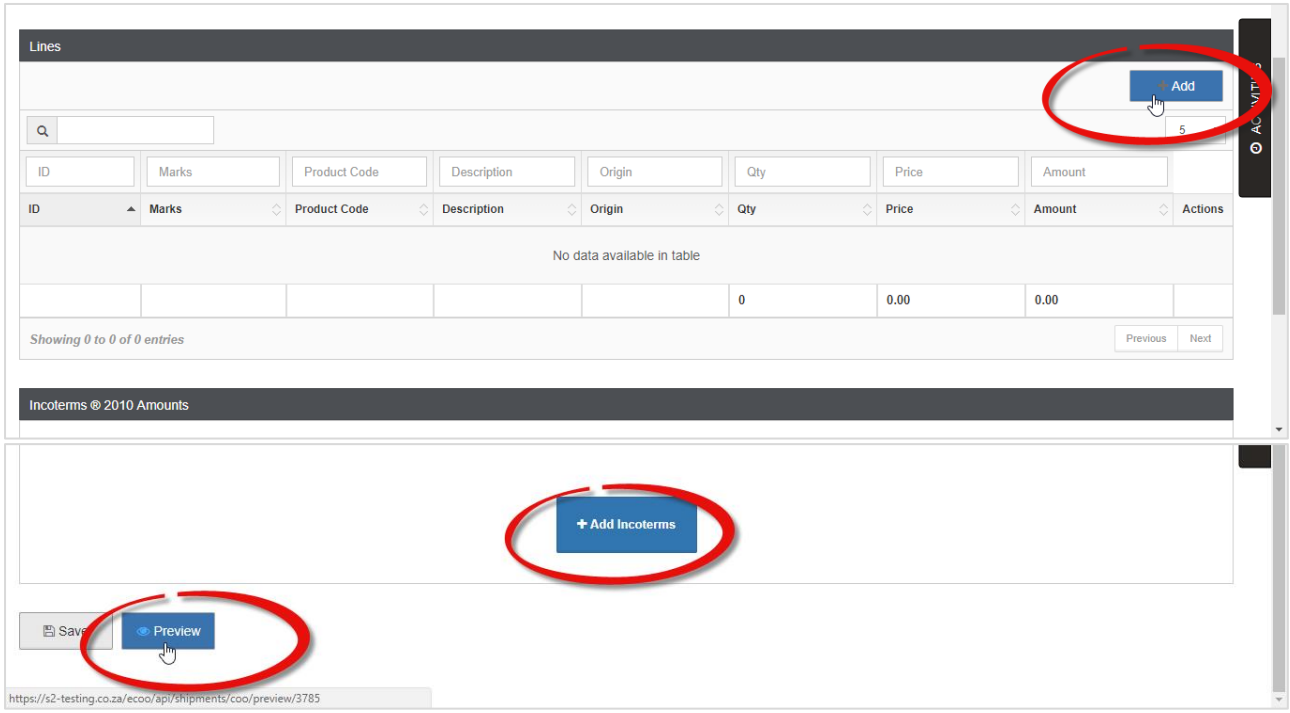
b) Upload an Excel.csv (comma delimited) file.
(If there are many lines on the Certificate (with Country of Origin per line a pre-requisite as multiple Origins are allowed on one certificate) – then if the client has supplied the information in an excel.xlsx format you can convert the file to excel.csv (comma delimited) or excel.txt and import the file according to the ECOO template directly.)

It is purely a matter of choice and experience.

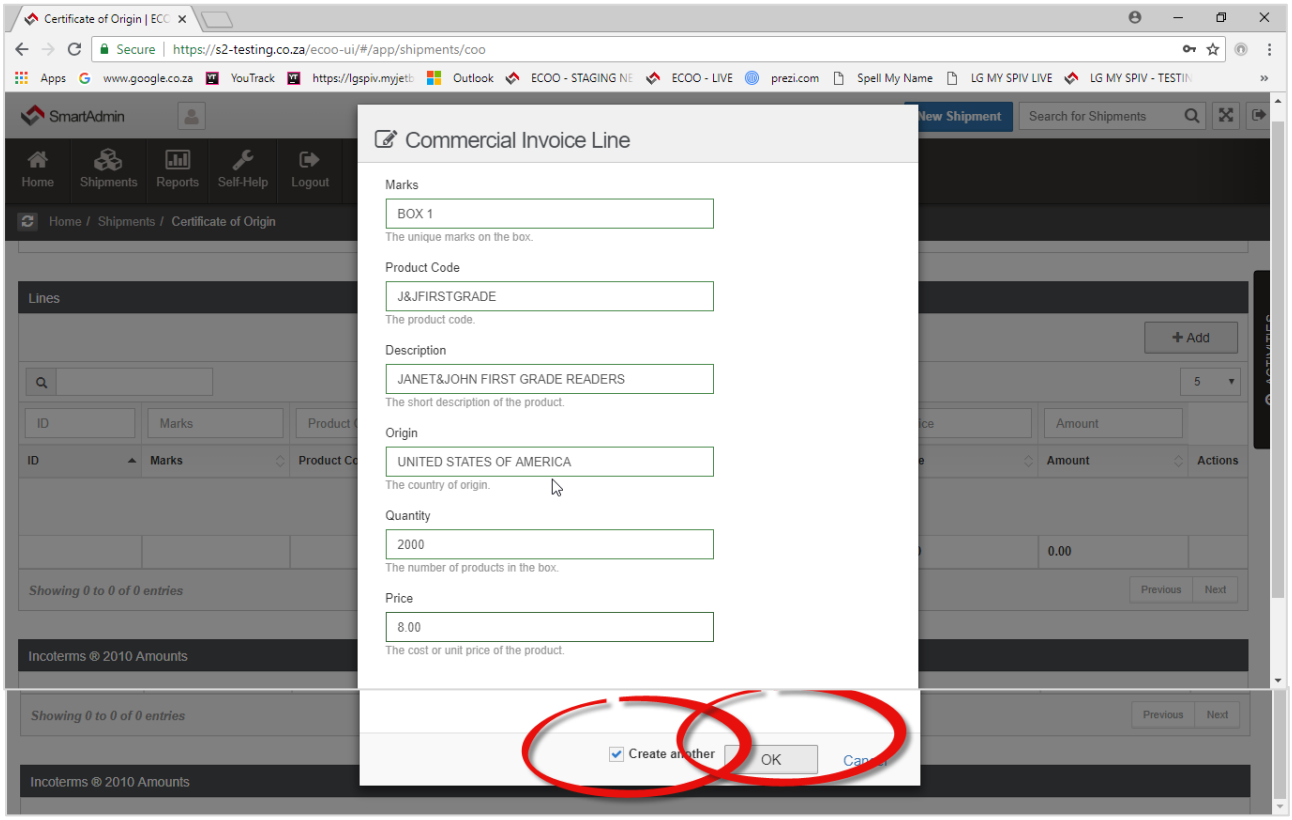
Capture the Certificate Manually

Click on the 'Capture Manually" Button and the following Wizard opens:





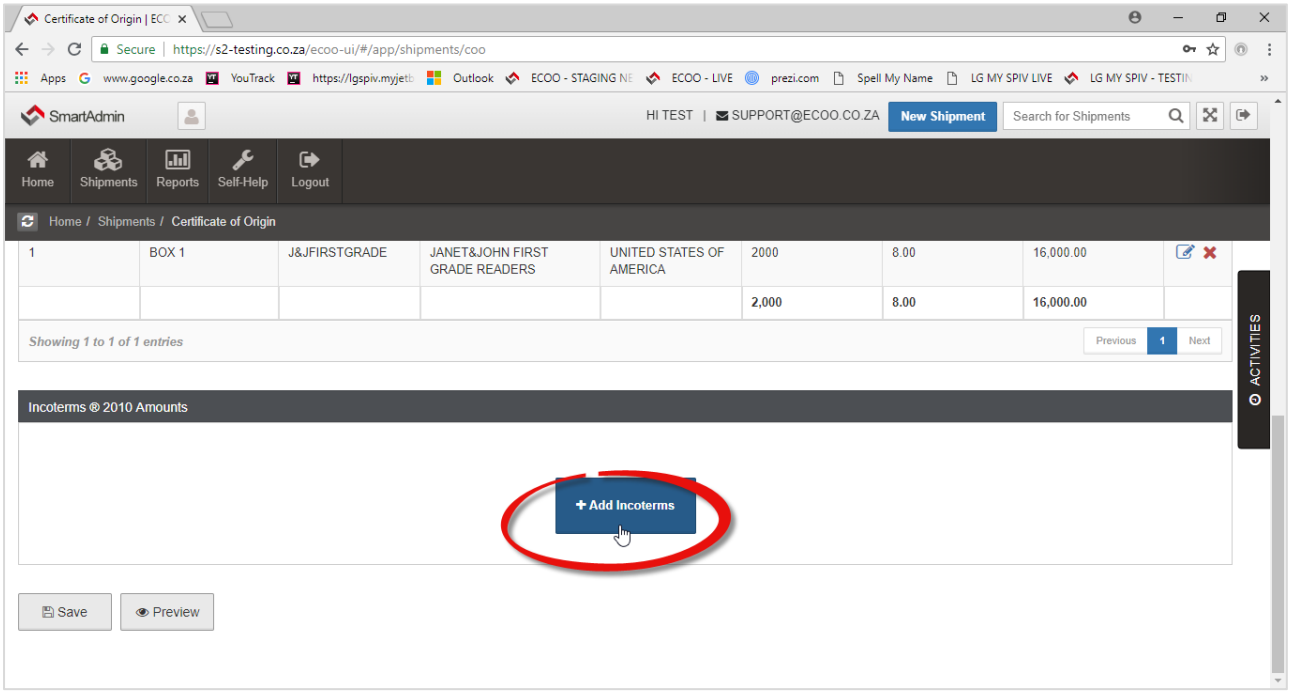
a) Click on "ADD" lines to the Certificate of Origin and the following screen appears: Complete and check the box at the bottom if you want to add extra lines to the Certificate of Origin. (Uncheck the box when done) Say OK.



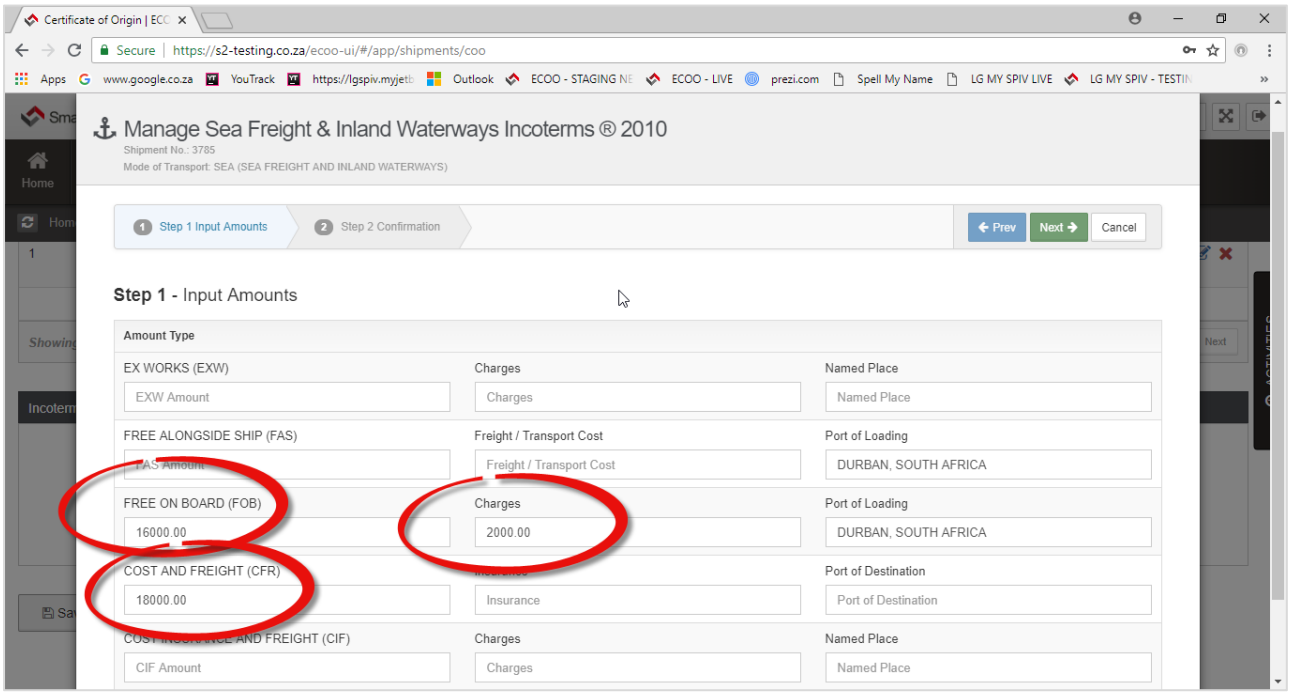
The lines are populated in the Certificate of Origin widget. The action buttons encircled below are the Edit or Delete buttons

3.1 ADD INCOTERMS

Add Incoterms: (Note not compulsory on the ECOO system as yet – but please note this is a global requirement and will be made compulsory going forward.

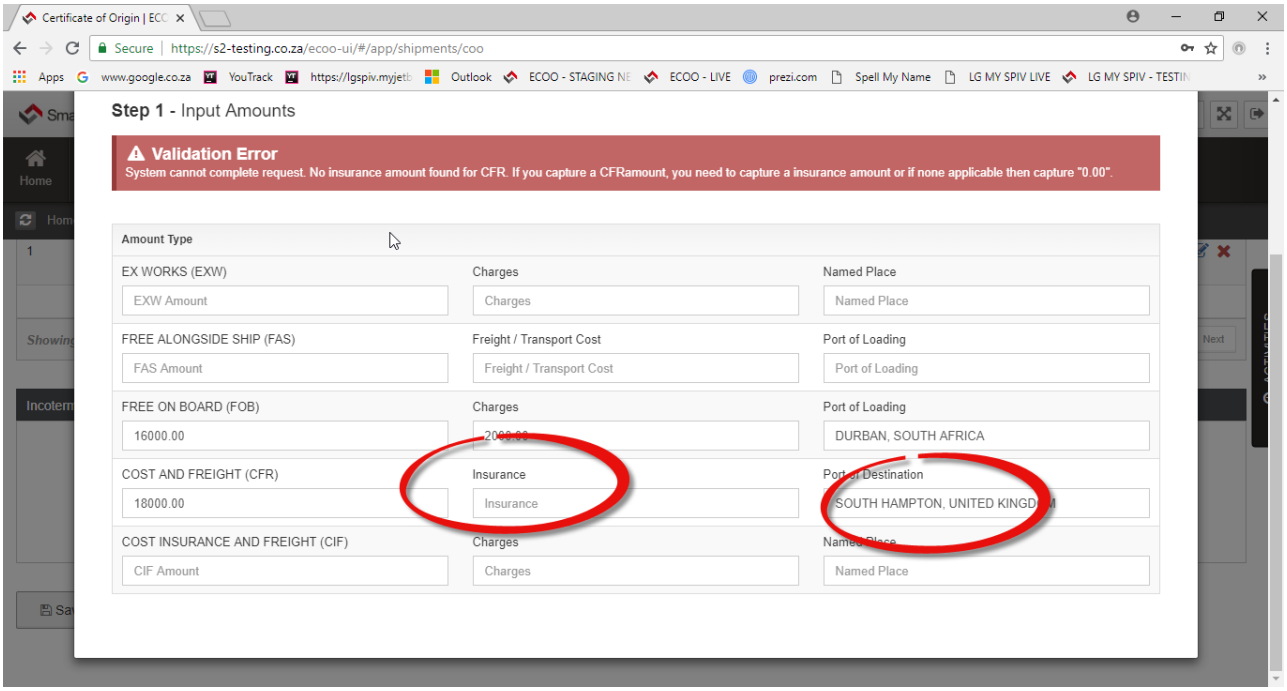


Let's assume the Incoterm is CFR:

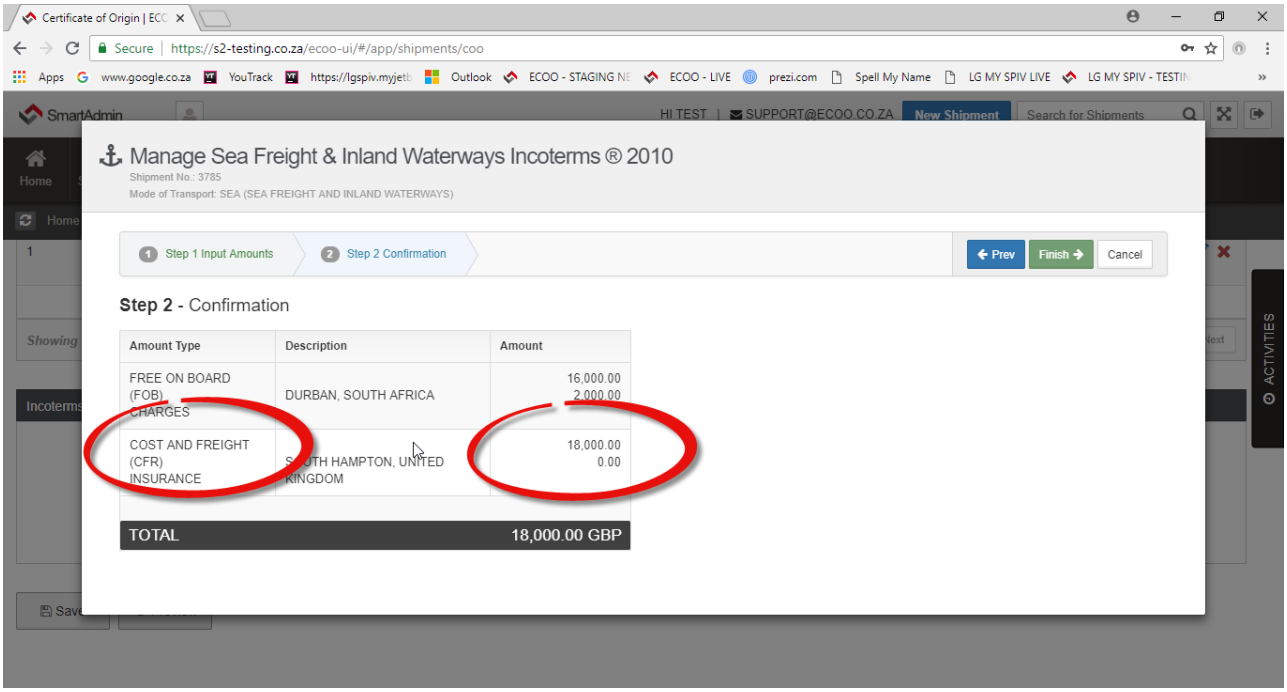


Step 1 of the Incoterm Wizard: Enter the FOB Price, (lines total) then enter the Freight Cost and then manually add the two field to = CFR

Step 2: Validation of the Incoterm, if incorrect a warning appears – follow the instruction given in RED.
(Also make sure you manually enter the Port of Loading and Port of Destination before continuing to the end.



If all correct, click FINISH – if not, go back to correct.

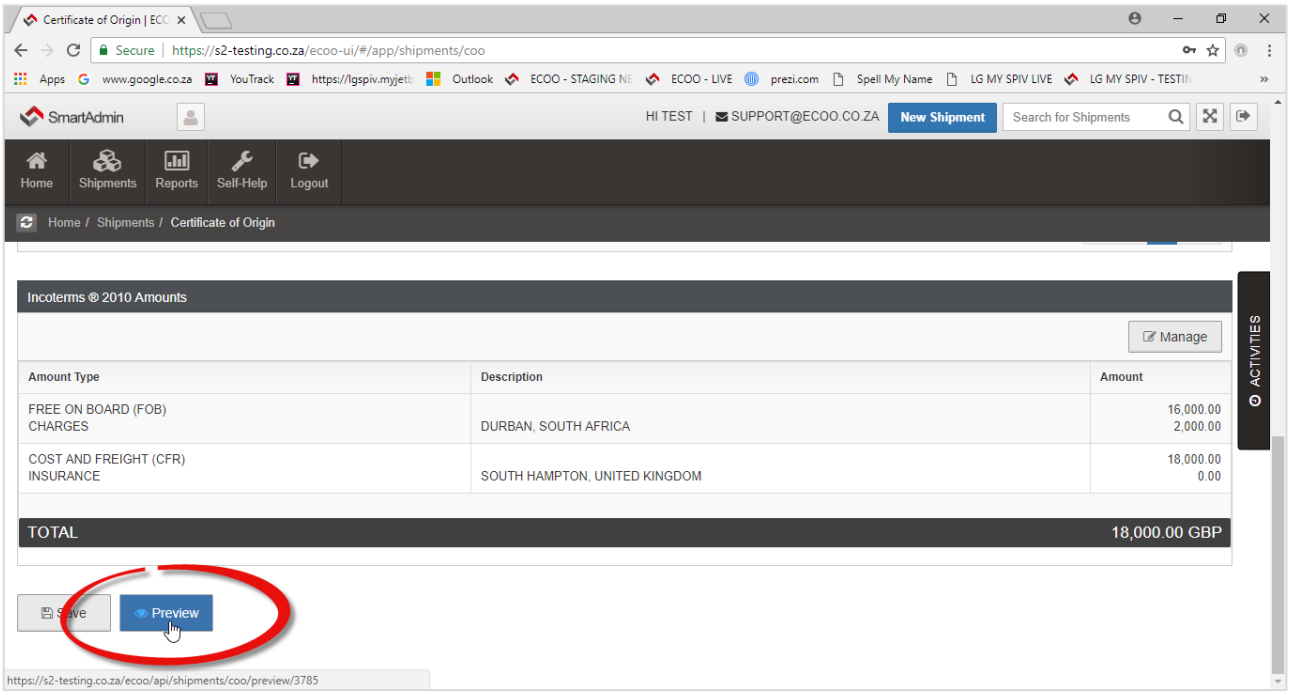


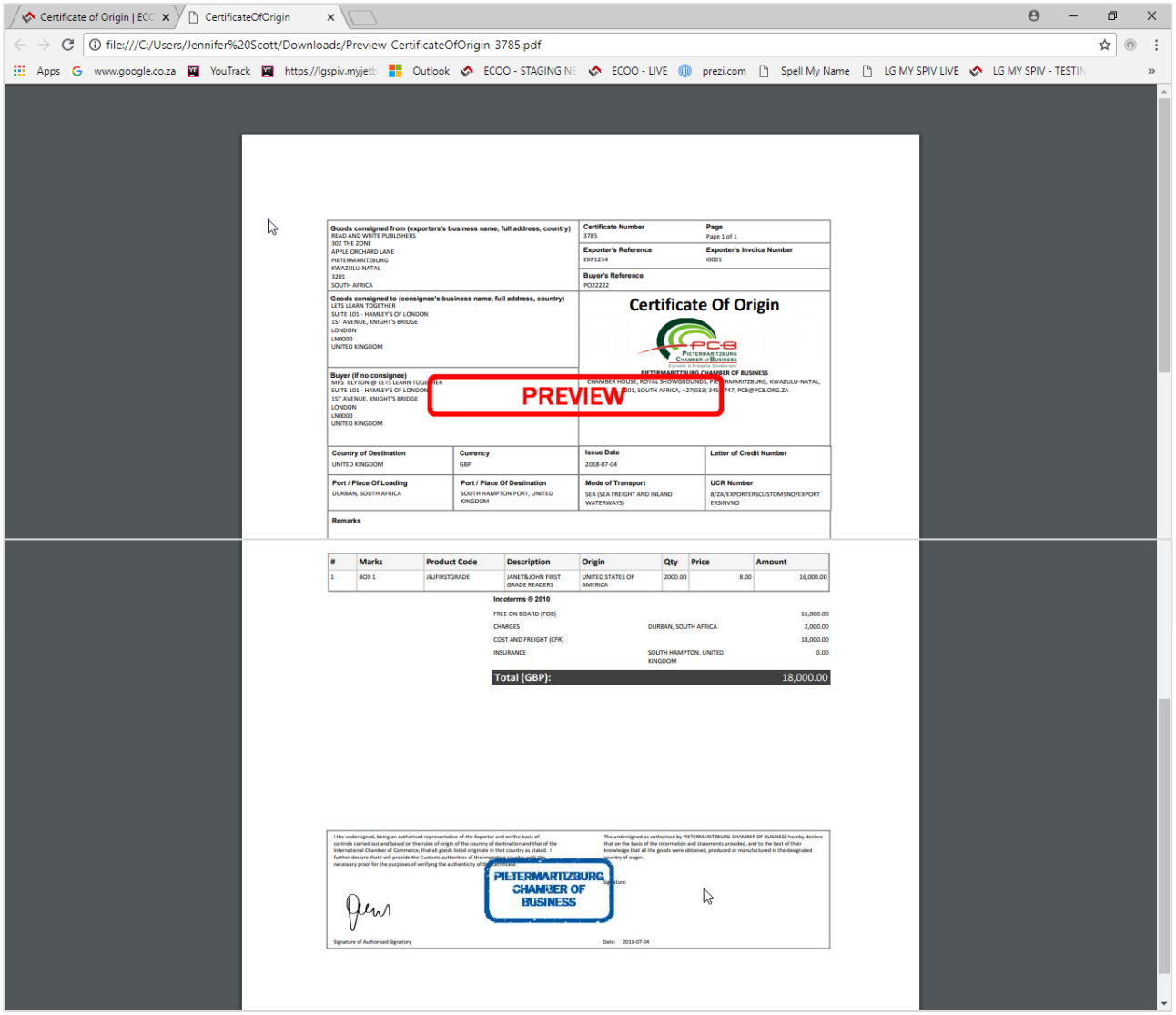
NOTES:

a) *You do have the option to mark the Certificate of Origin as "NDV"* (No declared value.) To do so, enter all the prices as above, then click on the 'ACTION' button just under the Green Shipment Widget. Select "Hide Price" all prices will change to "NDV" and Incoterms 2010 will be removed as well. (To show the prices again, click on the ACTIONS then "Show Price" and it will bring it back again.

b) There are over 1000 characters allowed for free text in the "Remarks" box of the Certificate of Origin" where you can add any information that has not been captured on the Certificate of Origin but is required by your clients. E.g. If your client needs the *Freight Forwarders file reference* to be shown on the Certificate of Origin – it can be included in the Line item description of the Certificate, or free text typed in the Remarks box. (Note: The Freight Forwarders File Reference does not pull through to the Certificate of Origin from the Shipment wizard. It pulls through to the Shipment Statement only, once the Chambers have invoiced your shipments for any pre-determined period.)

c) Preview the Certificate before submitting the Chamber for approval by clicking on PREVIEW screen on the Certificate of Origin Widget.



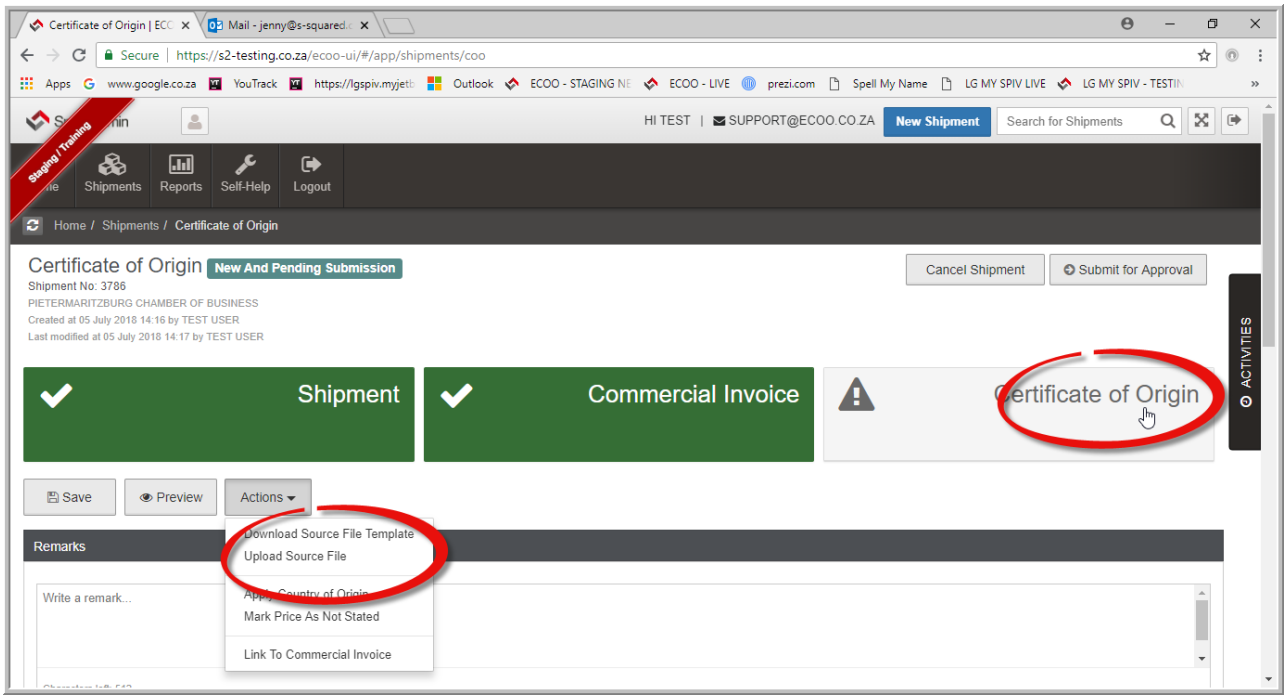

Certificate of Origin | ECO
CertificateOfOrigin
file:///C:/Users/Jennifer%20Scott/Downloads/Preview-CertificateOfOrigin-3785.pdf
Goods consigned from (exporters's business name, full address, country)
READ AND WRITE PUBLISHERS
302 THE ZONE
APPLE ORCHARD LANE
PIETERMARITZBURG
KWAZULU-NATAL
3201
SOUTH AFRICA
Certificate Number
3785
Page
Page 1 of 1
Exporter's Reference
EXP1234
Exporter's Invoice Number
I0001
Buyer's Reference
PO22222
Goods consigned to (consignee's business name, full address, country)
LETS LEARN TOGETHER
SUITE 101 - HAMLEY'S OF LONDON
1ST AVENUE, KNIGHT'S BRIDGE
LONDON
LN0000
UNITED KINGDOM
Certificate Of Origin
PIETERMARITZBURG CHAMBER OF BUSINESS
Buyer (if no consignee)
MRS. BLYTON @ LETS LEARN TOGETHER
SUITE 101 - HAMLEY'S OF LONDON
1ST AVENUE, KNIGHT'S BRIDGE
LONDON
LN0000
UNITED KINGDOM
PREVIEW
Country of Destination
UNITED KINGDOM
Currency
GBP
Issue Date
2018-07-04
Letter of Credit Number
Port / Place Of Loading
DURBAN, SOUTH AFRICA
Port / Place Of Destination
SOUTH HAMPTON PORT, UNITED KINGDOM
Mode of Transport
SEA (SEA FREIGHT AND INLAND WATERWAYS)
UCR Number
Remarks
Marks Product Code Description Origin Qty Price Amount
1 BOX 1 J&JFIRSTGRADE JANET&JOHN FIRST GRADE READERS UNITED STATES OF AMERICA 2000.00 8.00 16,000.00
Incoterms ® 2010
FREE ON BOARD (FOB) 16,000.00
CHARGES DURBAN, SOUTH AFRICA 2,000.00
COST AND FREIGHT (CFR) 18,000.00
INSURANCE SOUTH HAMPTON, UNITED KINGDOM 0.00
Total (GBP): 18,000.00
PIETERMARITZBURG CHAMBER OF BUSINESS
Signature of Authorised Signatory
Date: 2018-07-04

3.2 UPLOAD CERTIFICATE OF ORIGIN

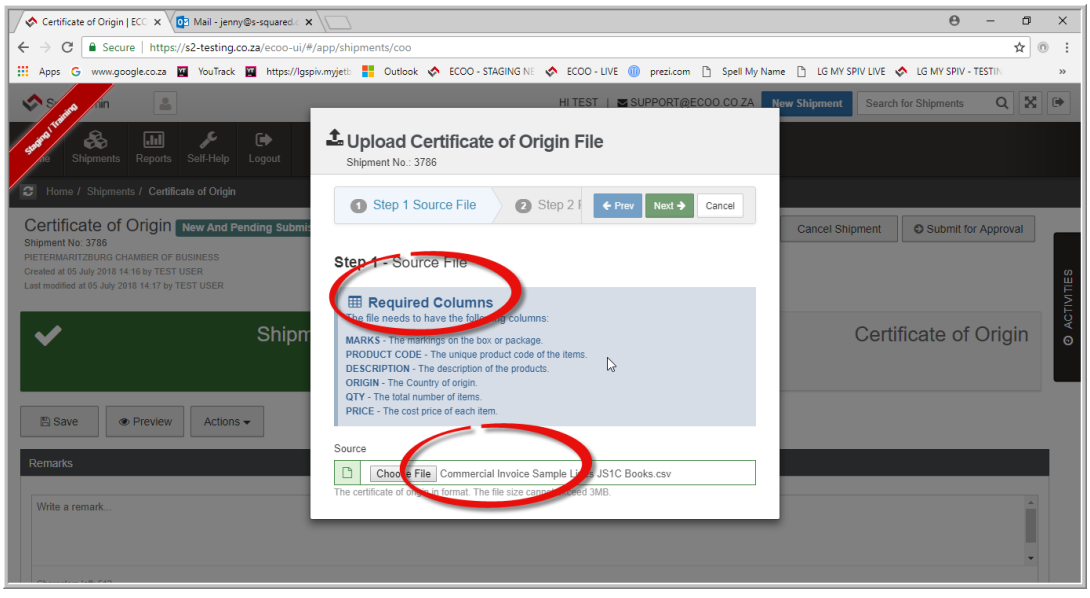
Capture the Certificate of Origin by importing an Excel.csv (comma delimited) or Excel.txt file or Excel.xls/xlsx file.

(The only difference between Option 1 and Option 2 is how you capture the lines of the Certificate of Origin. The remainder of the process remains exactly the same as option 1 above. Ie Adding remarks, adding Incoterms, Save, Preview etc.)

To upload an Excel.csv or Excel Text file, first click on the "Certificate of Origin" Widget and then on "Actions" and the click on "Upload Source File" (See below)

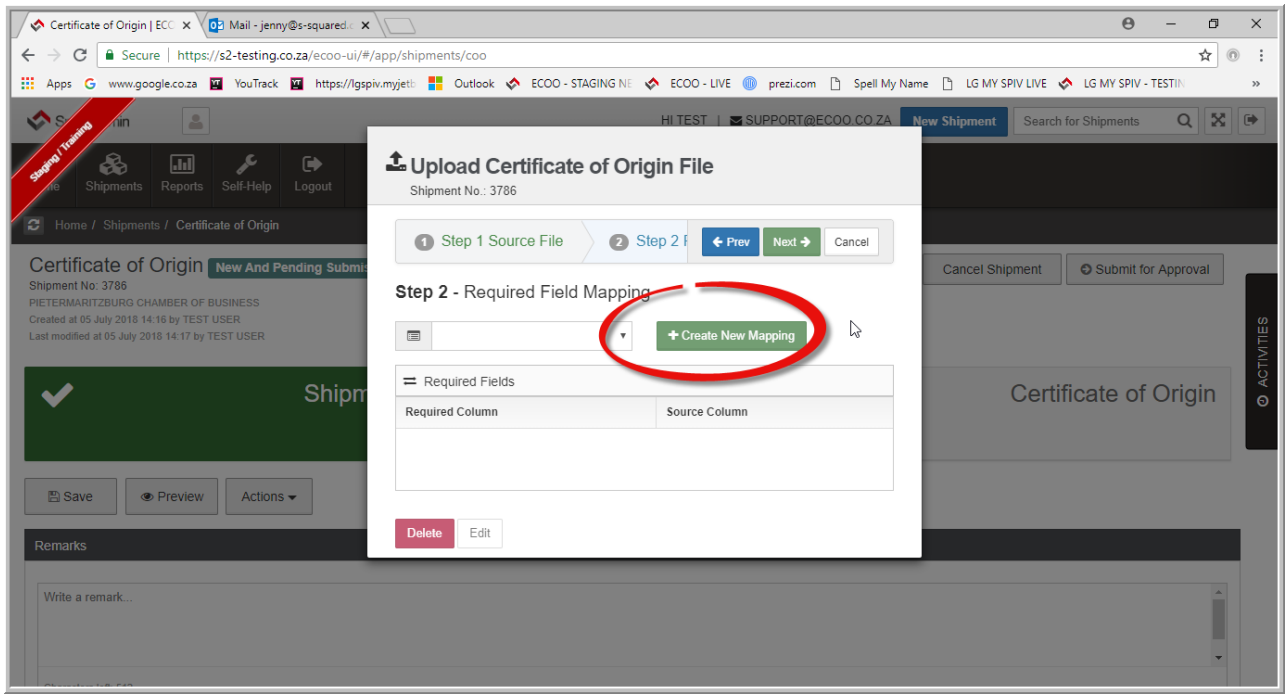


The following screen pops up below. Ensure that your .csv file has the required columns. Your file' headings may be different, but must be able to map to and match the information required by the system. Choose your source file saved on your computer.

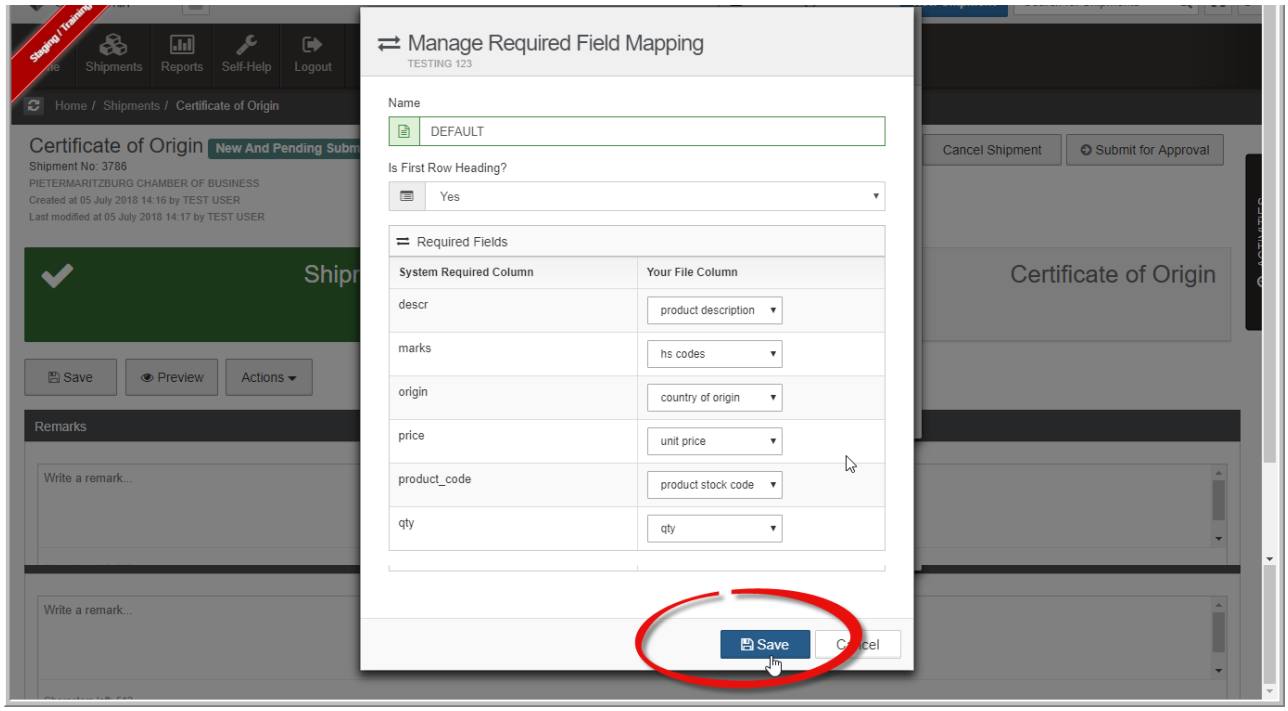


Once you have chosen your source file, click “NEXT”

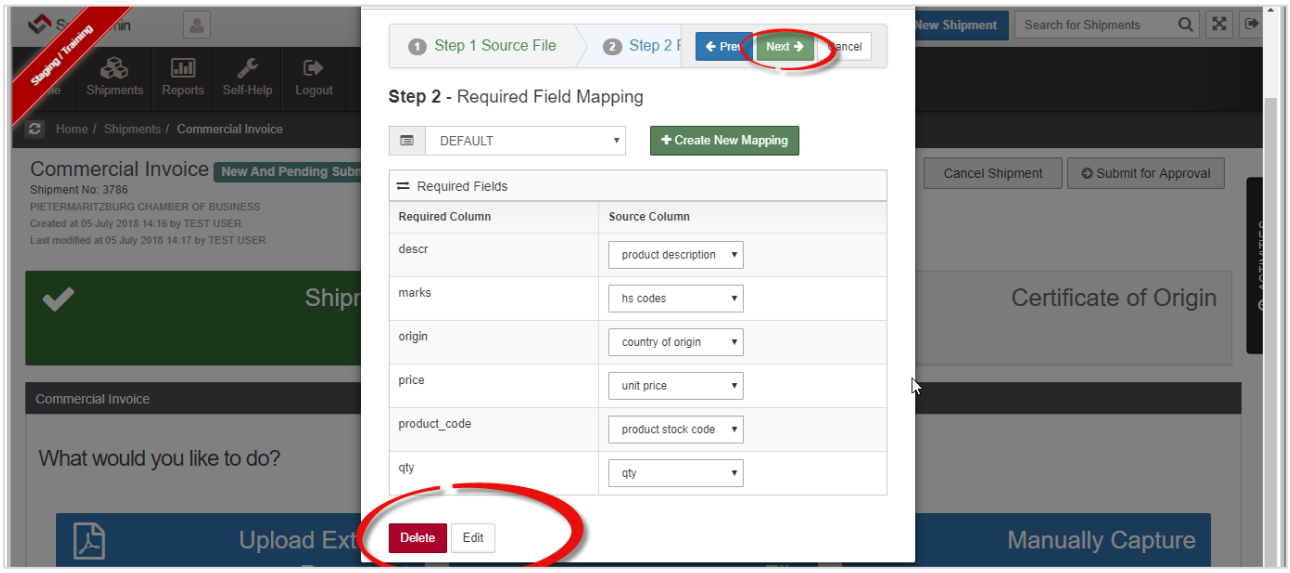
The following screen pops to enable you to map the file. If the dropdown menu is empty, it means you have to “Create New Mapping”



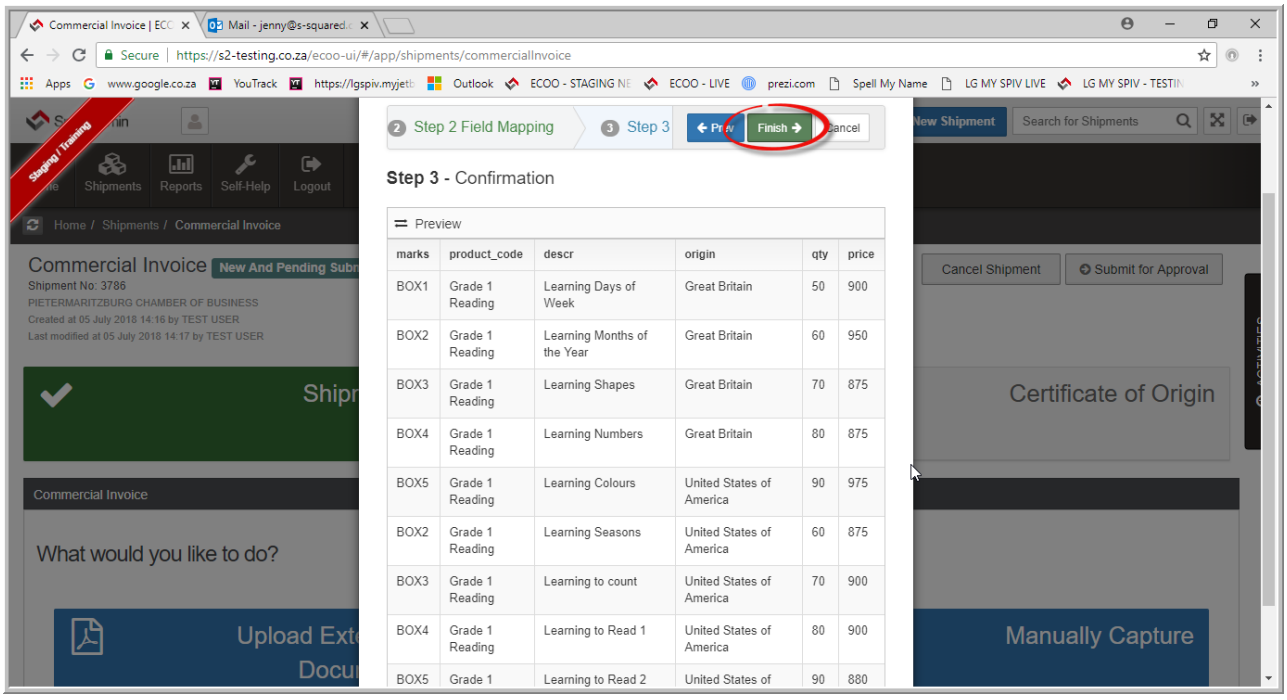
Create the field mapping – Name your field map e.g. Default, Is your first row a heading? Yes/No from dropdown menu, then map your file columns to the System required columns. Info must match even though headings slightly different. (See screenshot below) Thereafter click “SAVE” button to continue.



A confirmation of the field mapping screen then pops up, if all ok, click the “NEXT” button, or you have the opportunity to edit/delete the mapping.



Once you have clicked “Next” the following screen gives you a PREVIEW and confirmation of what your imported file looks like. Before you click “FINISH” you can go back or cancel if the file looks ‘off’ in any way.

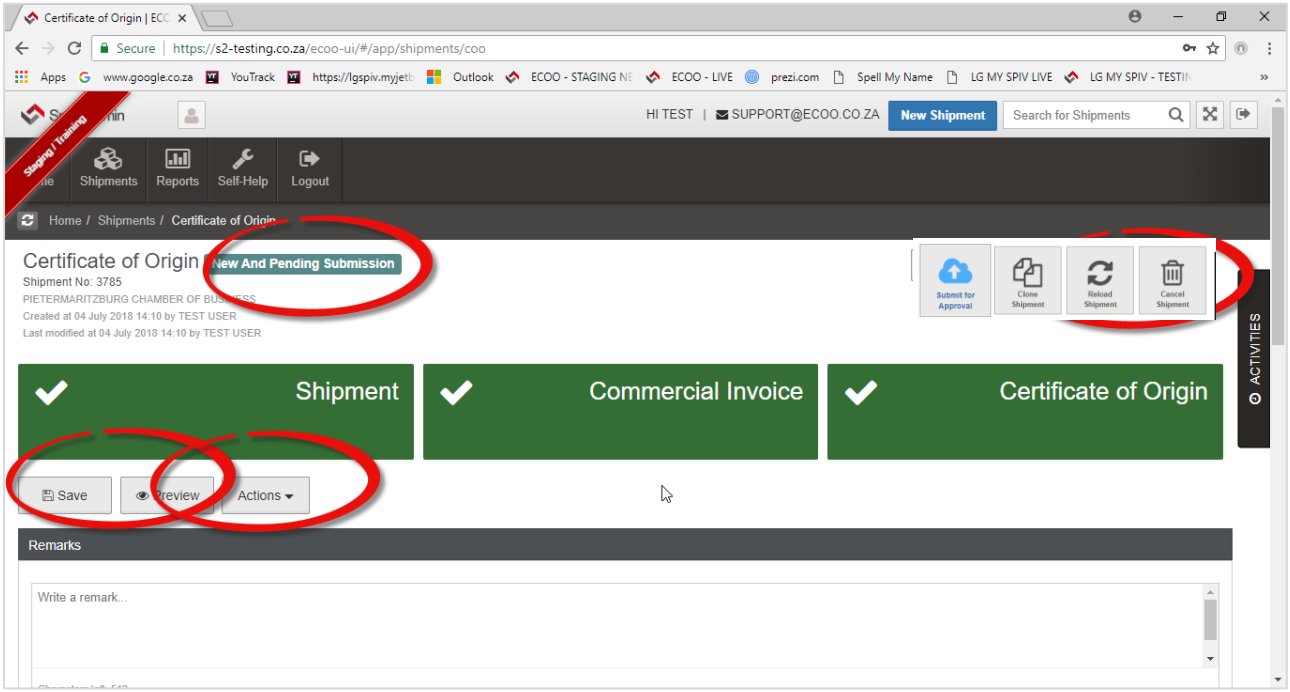


Once you have clicked ‘FINISH’ you will return to your “Certificate of Origin” Wizard to complete the certificate as per Option 1 above, after you had manually captured you lines. Click on “Save” to save your COO, then PREVIEW before submitting to the Chamber for approval.

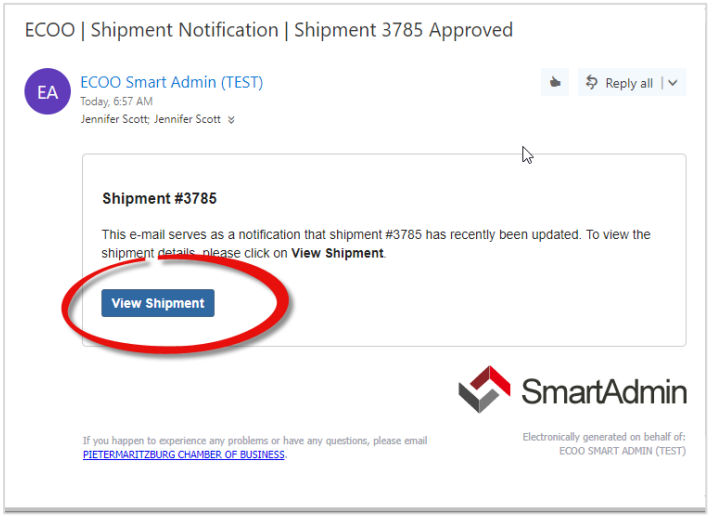
SUBMIT FOR APPROVAL

If all in order go back to the Shipment and then click on the "SUBMIT FOR APPROVAL BUTTON" You will receive an email advising you that your shipment was successfully sent through to the Chamber.

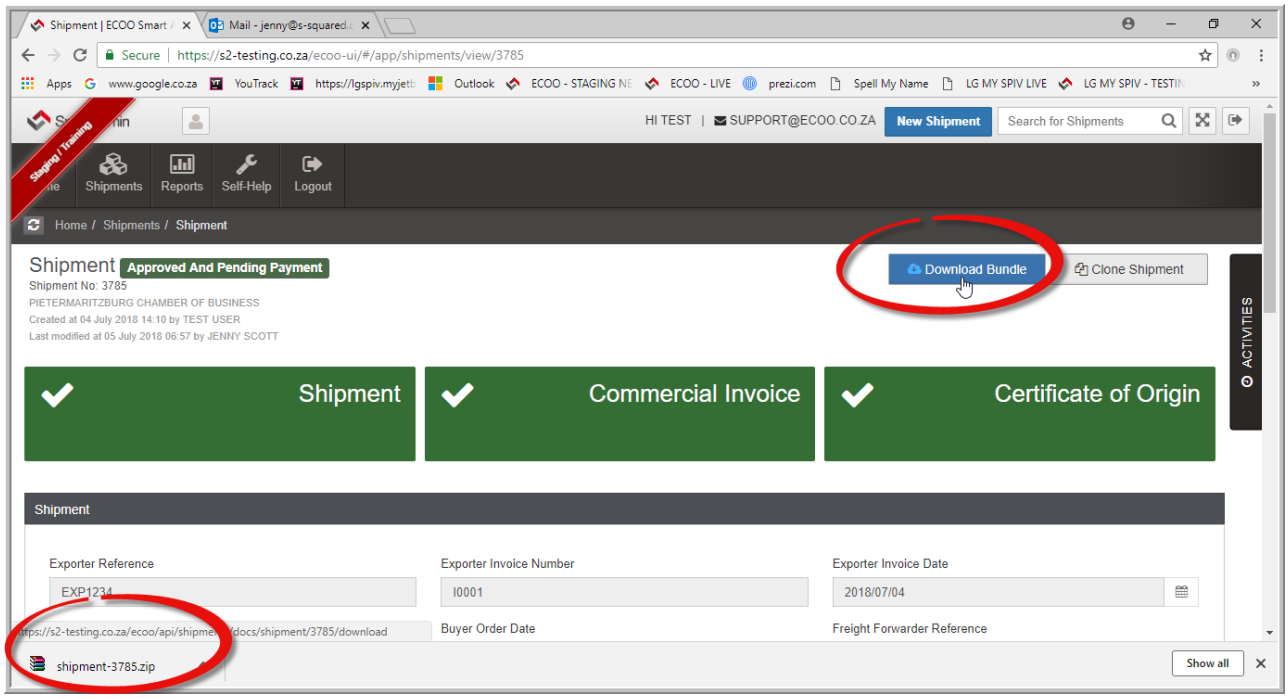
Also note the STATUS of your shipment is "NEW and PENDING SUBMISSION". Once you submit for approval, the STATUS changes to "SUBMITTED AND PENDING CHAMBER APPROVAL" When they receive the email advising them that you are requesting approval, as soon as a person within the chamber takes ownership of approving the shipment, then the status will change to "UNDER CHAMBER REVIEW" and then "Approved and Pending Payment."

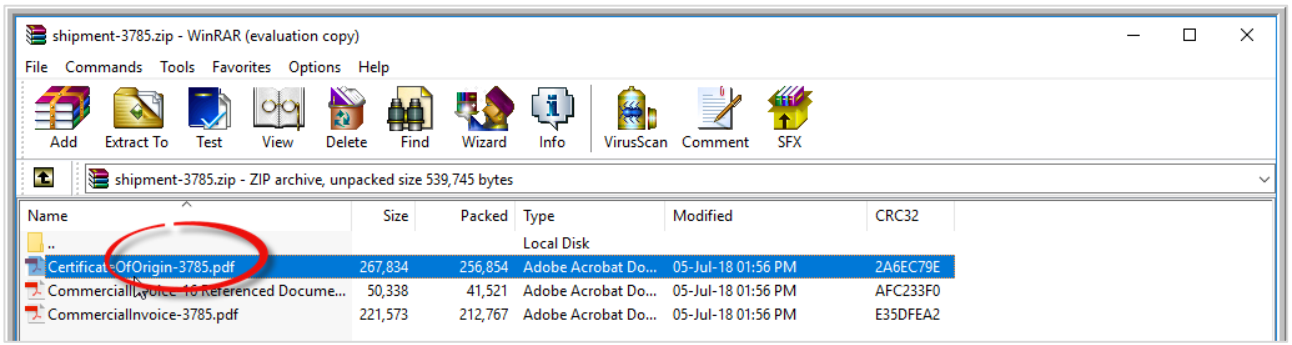


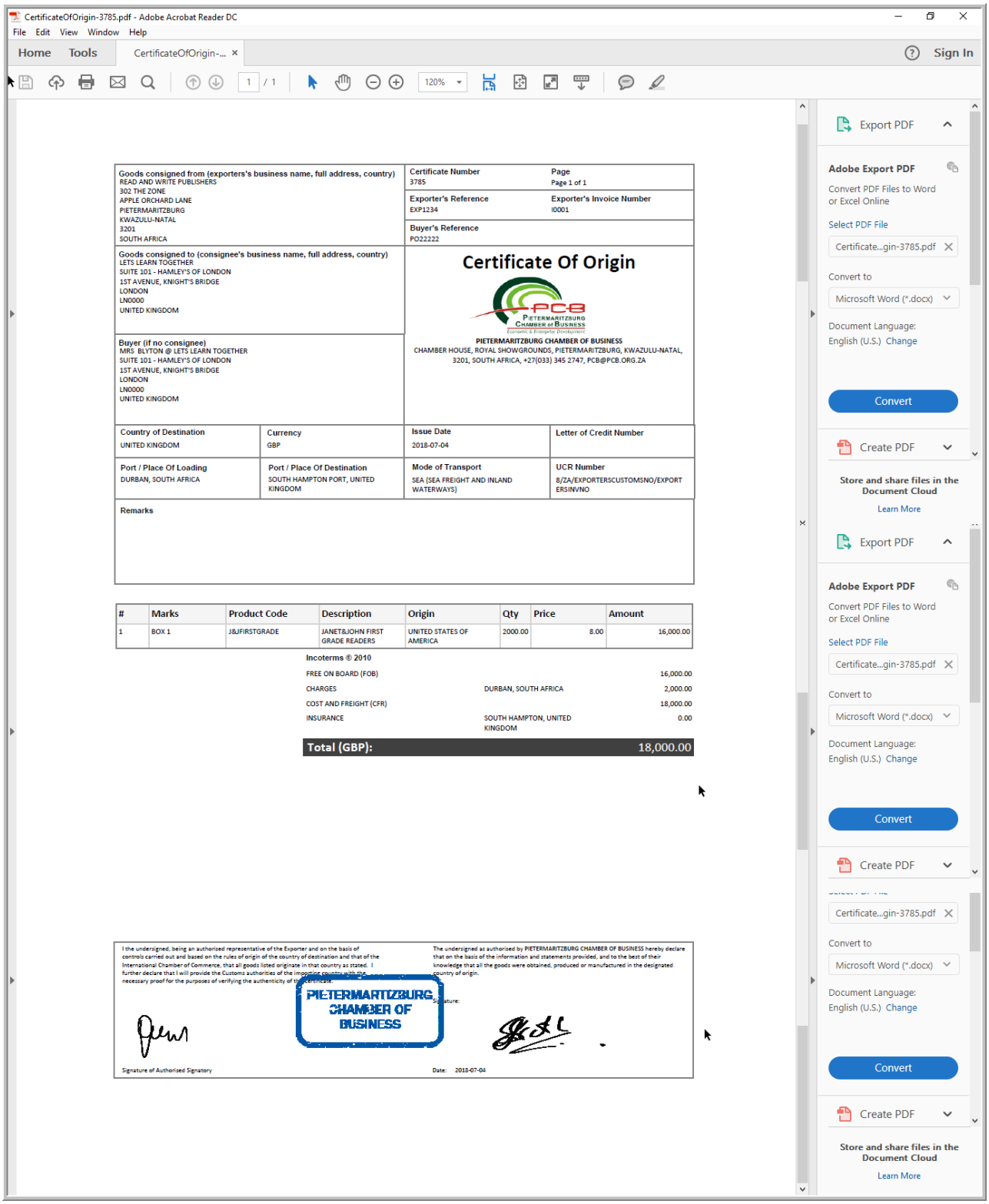
As soon as the Chamber have approved the Shipment, you will receive an email advising that shipment updated. Click on view shipment in order to "Download Bundle" (Commercial Invoice and Certificate of Origin). Print COO in colour for originals and black and white for copies of the COO.



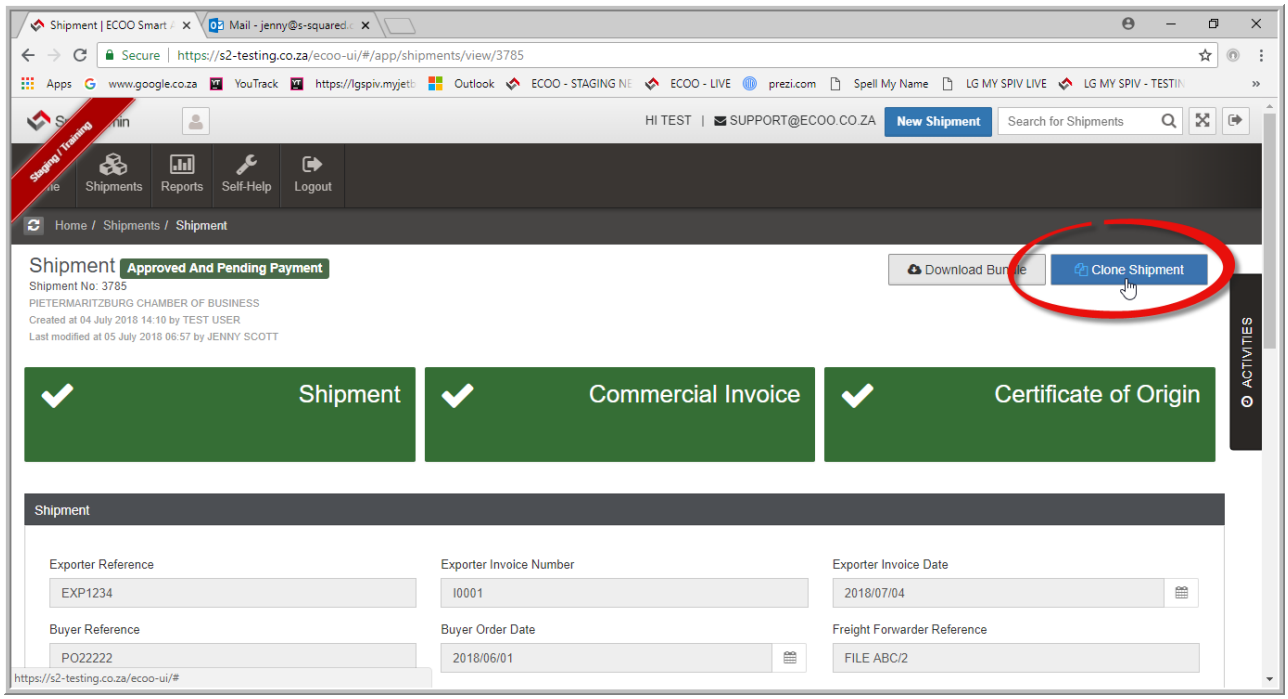
Click on the View Shipment button in the email above, and it will take you directly to the relevant Shipment # screen, (see below). Click on the "Download Bundle" button to download and open the .zip file containing the commercial invoice and certificate of origin. Print out the Certificate of Origin as explained above.






CertificateOfOrigin-3785.pdf - Adobe Acrobat Reader DC
File Edit View Window Help
Home Tools
CertificateOfOrigin-...
Sign In
Goods consigned from (exporters's business name, full address, country)
READ AND WRITE PUBLISHERS
302 THE ZONE
APPLE ORCHARD LANE
PIETERMARITZBURG
KWAZULU-NATAL
3201
SOUTH AFRICA
Certificate Number
3785
Page
Page 1 of 1
Exporter's Reference
EXP1234
Exporter's Invoice Number
I0001
Buyer's Reference
PO22222
Goods consigned to (consignee's business name, full address, country)
LETS LEARN TOGETHER
SUITE 101 - HAMLEY'S OF LONDON
1ST AVENUE, KNIGHT'S BRIDGE
LONDON
LN0000
UNITED KINGDOM
Certificate Of Origin
PIETERMARITZBURG CHAMBER OF BUSINESS
CHAMBER HOUSE, ROYAL SHOWGROUNDS, PIETERMARITZBURG, KWAZULU-NATAL, 3201, SOUTH AFRICA, +27(033) 345 2747, PCB@PCB.ORG.ZA
Buyer (if no consignee)
MRS BLYTON @ LETS LEARN TOGETHER
SUITE 101 - HAMLEY'S OF LONDON
1ST AVENUE, KNIGHT'S BRIDGE
LONDON
LN0000
UNITED KINGDOM
Country of Destination
UNITED KINGDOM
Currency
GBP
Issue Date
2018-07-04
Letter of Credit Number
Port / Place Of Loading
DURBAN, SOUTH AFRICA
Port / Place Of Destination
SOUTH HAMPTON PORT, UNITED KINGDOM
Mode of Transport
SEA (SEA FREIGHT AND INLAND WATERWAYS)
UCR Number
8/ZA/EXPORTERSCUSTOMSNO/EXPORTERSINVNO
Remarks
Marks Product Code Description Origin Qty Price Amount
1 BOX 1 J&JFIRSTGRADE JANET&JOHN FIRST GRADE READERS UNITED STATES OF AMERICA 2000.00 8.00 16,000.00
Incoterms ® 2010
FREE ON BOARD (FOB) 16,000.00
CHARGES DURBAN, SOUTH AFRICA 2,000.00
COST AND FREIGHT (CFR) 18,000.00
INSURANCE SOUTH HAMPTON, UNITED KINGDOM 0.00
Total (GBP): 18,000.00
I the undersigned, being an authorised representative of the Exporter and on the basis of controls carried out and based on the rules of origin of the country of destination and that of the International Chamber of Commerce, that all goods listed originate in that country as stated. I further declare that I will provide the Customs authorities of the importing country with the necessary proof for the purposes of verifying the authenticity of the certificate.
The undersigned as authorised by PIETERMARITZBURG CHAMBER OF BUSINESS hereby declare that on the basis of the information and statements provided, and to the best of their knowledge that all the goods were obtained, produced or manufactured in the designated country of origin.
PIETERMARITZBURG CHAMBER OF BUSINESS
Signature of Authorised Signatory
Date: 2018-07-04
Export PDF
Adobe Export PDF
Convert PDF Files to Word or Excel Online
Select PDF File
Certificate...gin-3785.pdf
Convert to
Microsoft Word (*.docx)
Document Language:
English (U.S.) Change
Convert
Create PDF
Store and share files in the Document Cloud
Learn More

CLONE SHIPMENT

(You have the option to clone shipments that are basically similar every time for the same exporter and line items. You must edit the shipment information on the "Shipment" wizard, as well as delete the old Commercial Invoice and upload the new one. Finally you need to import a new Excel.csv file, or amend the lines within the Certificate of Origin wizard. Remember to SAVE all changes in each wizard. Submit for approval as per normal processes above.)

To clone a shipment you can only choose shipments with the status "Approved and Pending Payment" or "Closed" (COO has been Invoiced by the Chamber.) You cannot clone shipments with status "New and Pending Submission" or "Cancelled."