



Hints, Tips and Shortcuts

	Version	Created Date
Hints, Tips, and Shortcuts	V1	22/09/2023

1	Introduction and Disclaimer	4
2	Logging In/Changing Passwords	5
2.1	WiseCloud Password	5
2.2	C1 Password.....	6
	First Time Sign In.....	6
	Interim Password.....	6
	Login Restrictions.....	7
	Change Password from the Options Key	7
3	Jump Screen	8
3.1	Favorites	8
	Creating a Favorite from within a record	8
3.2	Recent Items	9
3.3	Recent Modules.....	9
4	Symbols and Shortcuts	10
4.1	Message Symbols	10
4.2	Functional Symbols	11
4.3	Filter Symbols.....	11
4.4	Shortcut Keys.....	12
5	Search Screen – Filters	13
5.1	Filter Options	14
	Adding a Filter Strip	14
	Deleting a Filter Strip.....	14
	Saving a Filter Layout as a Favorite	15
	Save columns with this filter layout	17
	Locating Records.....	17
	Clearing Entered Filters.....	17
	Textual Operators	17
	“Blue” filter items	18
	Search Numbers	18
	Slow Searches/Contains	19
5.2	Filter Category Groups.....	20
	Adding Filters to a Filter Category	20
5.3	Search Screen - Grids	22
	Customize Columns	22
	Adding and Removing Columns from the Grid	23
	Grid Custom Colors.....	24

5.4	Search Screen - Toolbar.....	28
	View.....	28
	New	28
	Edit.....	28
	Copy.....	28
	Delete	29
	Hide / Show Filter Functionality.....	29
5.5	Exporting Search criteria to Excel.....	30
	More than 1,000 records	30
6	Miscellaneous Functions, Additional Detail and Hints and Tips	31
6.1	Live vs. Test Databases.....	31
6.2	Search Button - Additional Detail.....	31
	Example.....	31
6.3	Calendar Function - Additional Detail	32
6.4	Calculator Function	33
6.5	Ctrl+0 From the Billing screen.....	33
6.6	F3 from within a record.....	34
6.7	“Control + E” to add your own email.....	35
6.8	Validate All.....	35
6.9	Previous / Next Function.....	36
6.10	Copy Hyperlink to Clipboard.....	36
6.11	Warnings in dialog boxes.....	37

1 Introduction and Disclaimer

The below information is to be used as a supplement to WiseTech Global videos, documents, and update notes, it is not intended as a replacement for WiseTech documentation.

In the event that there are any discrepancies between documentation below and WiseTech documentation, please enter a WiseTech help desk ticket for further clarification.

This document is NOT inclusive, but merely a collection of items Lading feels may be helpful at the time it was created.

**If you think you can
make it better...**

Do it.

Do you have an idea to improve this document? Do you have a shortcut that we can add to this document?

Let us know!!! Contact us at:

direction@yadritrans.com



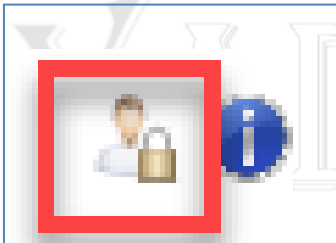
2 Logging In/Changing Passwords

Logging in to CargoWise requires TWO passwords, one of which is set by WiseTech, the other of which is set by your administrator.

2.1 WiseCloud Password

The WiseCloud password is entered on a screen similar to the one shown to the right.

It may be changed by going to the top right corner and clicking on the icon which looks like a person and a lock.



Once this icon is clicked on, a screen similar to the one below will appear you must type your old password, and your new password (twice).



All passwords must be a minimum of 8 characters in length, contain at least one number and contain at least one capital letter.

2.2 C1 Password

First Time Sign In

The first time you sign into c1, you may notice your 3 digit company and city code in front of your name (right) - **you must erase the company and city code to sign in! (In this case, "ivy.chi.")**

Interim Password

The first time you log into c1, your admin may assign an *interim* password.

The following message displays and you will be required to change your password:

In the change password screen:

Enter the password you used to login in the **Old Password** field

Select a new password and enter it in the **New Password** field

Enter the new password in the **Confirm New Password** field

To open the c1 main screen, mouse click on the **OK** button.

Next, the system will ask you to change your password you may have to log out and log back in to access the system.

Login Restrictions

Password

- Password - NOTE - CASE SENSITIVE
- Do NOT, under ANY CIRCUMSTANCES share your passwords

ALL information entered into c1 is monitored, and any changes made to a record are “stamped” with the user who made them, based on login and password.

Giving your password to another employee leaves you at risk - ANY changes they make in the system are done in YOUR NAME.

Number of Login attempts

If you exceed **Three (3)** attempts to enter a correct password, the following message displays to advise that login has failed:

You may not attempt to log in again for 30 minutes without Local Admin assistance.

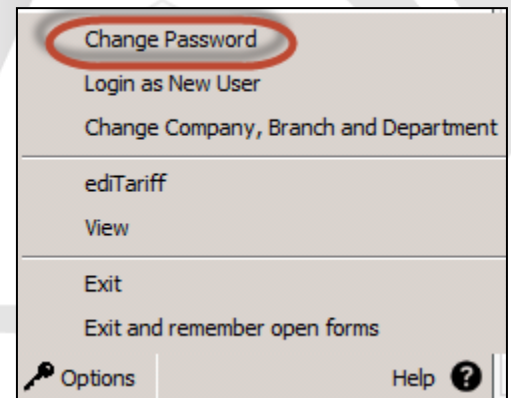
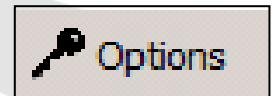


Change Password from the Options Key

You can change your password at any time.

From the c1 main screen:

1. Select the **Options** key in the lower left of the screen:
2. Select the “Change Password” Option
3. Enter the password you used to login in the **Old Password** field
4. Select a new password and enter it in the **New Password** field
5. Your new password must be eight (8) characters, and must include at least one (1) capital letter and at least one (1) number/symbol
6. Enter the new password in the **Confirm New Password** field
7. To return to c1, mouse click on the **OK** button.



3 Jump Screen

3.1 Favorites

Up to 12 items can be stored as favorites.

Favorites can be dragged and dropped to change the order and ranking.

Adding and removing from favorites using the "Star"

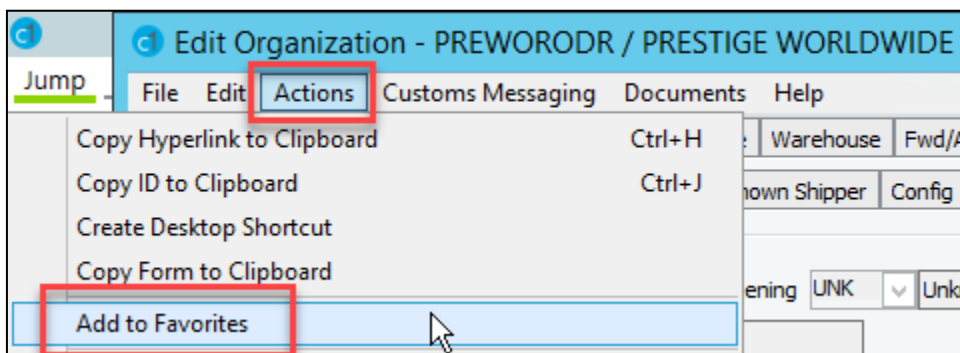
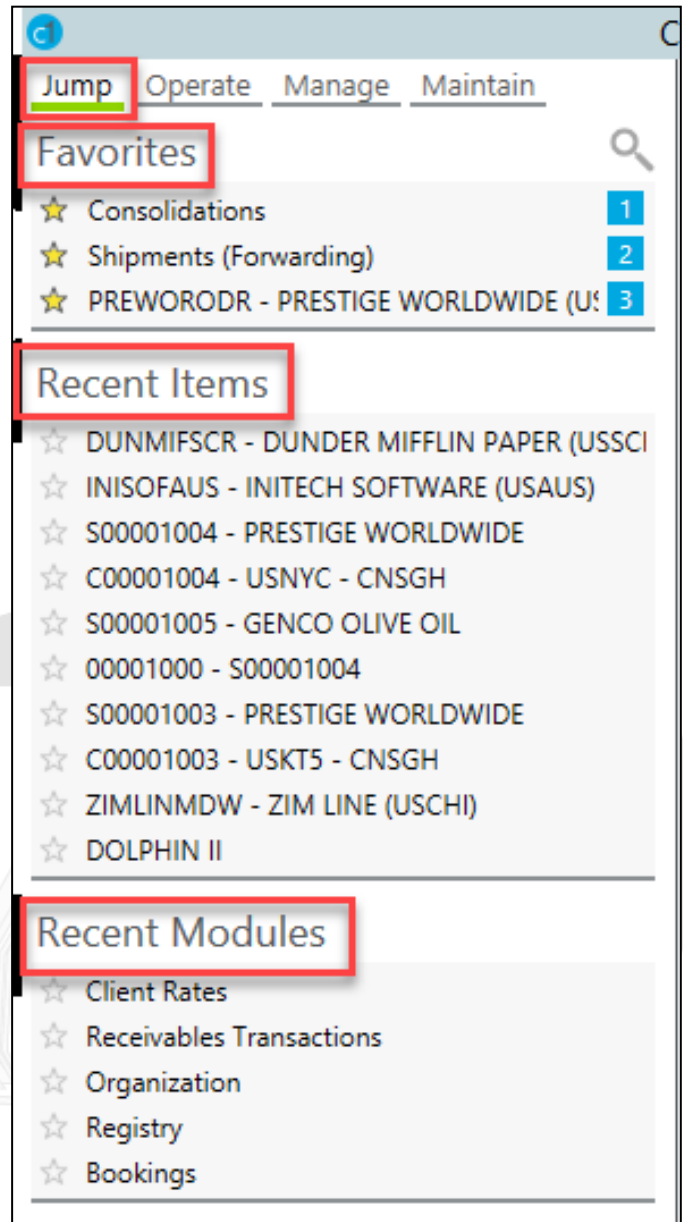
Any item on a list will have a star next to it - if the star is blank, it is NOT a favorite, if the star is yellow, it IS a favorite.

Simply click inside the star to add/remove items from the favorites list.

Creating a Favorite from within a record

From almost any record (Organization, Shipment, Consol, etc.) you can go to **Actions > Add to Favorites**

Once clicked, the record will appear last in the list of favorites. You can click on any favorite to go directly to the record. (See below)



3.2 Recent Items

Recent Items will show the last Items (not Modules) you were in.

Up to 10 records will be stored in the Recent Items section.

3.3 Recent Modules

Recent Modules will show the last Modules (not Items) you were in.

Up to 5 records will be stored in the Recent Modules section.



4 Symbols and Shortcuts

The below chapter highlights common Symbols and shortcuts - IT IS NOT COMPREHENSIVE - For additional information, see WiseTech Videos and Documentation:

4.1 Message Symbols

The following symbols are the most common visible throughout c1.

Symbol	Name	Description
	Error Message	You will get this symbol next to a field that is mandatory or entered incorrectly. This error will also appear on the tabs where the error exists. You must fix the error before saving the record.
	Message Warning	You will get this symbol next to a field required in electronic messaging if it is entered incorrectly or missing. This warning message will also appear on any tab where there is incorrect or missing data that could affect acceptance of a document by Customs, Airlines, or Steamship Lines. You should rectify this information prior to creating the document, message, etc. because it is likely your message/document will be rejected
	Warning Message	You will get this symbol next to field as a warning about the information you have entered on the screen. It is recommended but not necessary for you to enter or fix the data.
	Milestone Warning Message	You will get this symbol on the Workflow & Tracking Tab when a record has failed to achieve a milestone.



You can hover over the Error, Customs Warning or Warning symbol. This will prompt you with helpful hints as to what should be entered. See example to right:



4.2 Functional Symbols

You can mouse-click on the following symbols:

Symbol	Name	Description
	Search Button	Click on this button to search for an existing CargoWise One record.
	Drop-down List	Click on this button to select one value from the list.
	Calendar Button	Click on this button to view a calendar.

4.3 Filter Symbols

The following symbols can be used to manage your filters:

Symbol	Name	Description
	Add Button	Click on this button to add a new filter.
	Delete Button	Click on this button to delete a filter.
	Category Button	Click on this button to add a category to the filter.
	Clear Button	Click on this button to clear a filter.
	Find Button	Click on this button and the system will list all data that matches to the data criteria entered on the filter.
	Reset Button	Click on this button to reset filter criteria.
	Save Button	Click on this button to save filter fields selected.
	Manage Button	Click on this button either to delete a saved filter name or rename a filter name.
	Hide/Show Filters Button	Click on this button to collapse (hide) your search filter to allow for greater screen visibility of grid results. Click this button again to recall (unhide) the search filter.

4.4 Shortcut Keys

Filter Screen	Ctrl+Enter	Use to search using the selected filters. This is the same as selecting the Find button
	Alt+Enter	Use to clear the filtered criteria. This is the same as selecting the Clear button.
	Shift+F3	Use to view a record while in the filter screen.
	Ctrl+F3	Use to create a record while in the filter screen.
	Enter	Use to edit a highlighted record while in a filter screen.
General	Enter or Tab	Use to move to the next field.
	Ctrl+Tab	Use to move through tabs on screen.
	Alt	To access the top menu items. Once selected choose the letter that is underlined for the menu item required.
	F7	Use a fast look up for organizations.
	F10	To access the top menu items.
	Space Bar	Use to place a tick in a checkbox.
Search / Find Button	F4	Use to access the calculator when you are in a number field.
	F4	Use to search for a list of available choices for the selected field.
Drop-down List	F4 or Down arrow	This will show a drop-down list.
In Entry Grid	Enter	Use to move to the next in a row.
	Tab	Use to move to the next column.
	F9	Use to copy a grid/cell. This will copy the data from the cell in the line above.
Documents to Deliver Box	Ctrl+E	It will default your log in profile email address. Note this only works in the email address field.

5 Search Screen – Filters

Once a menu item is selected, the *Search Screen* will display. This screen offers many functions, including viewing and editing existing records, creating new records, recent items, and more.

This screen is divided into five sections:

1. Home Button - Selecting the Home button will return you to the Home Screen
2. Search Filters - use these fields to locate existing records
3. Results Grid - use the grid to view records as a result of the search filters
4. Search Screen Toolbar - use the buttons to view, create and edit records
5. Recent Items- the last 10 items you searched for will appear here. (Items currently on your favorites list will be noted with a yellow star.)

The screenshot shows the CargoWise One Search Screen interface. The title bar indicates the system is in 'TEST SYSTEM' mode for 'Ladino Corporation'. The interface includes a toolbar with buttons for View, New, Edit, Delete, and Actions, along with a 'Hide/Show Filters' toggle. The search filters section includes fields for City, Main UNLOCO, and a 'starts with' dropdown. The results grid displays a list of records with columns for Code, Full Name, UNLOCO, City, State, Branch, Scrn. Adm., and Category. The recent items section on the right lists the last 10 searched items, with the first item marked as a favorite with a yellow star.

Code	Full Name	UNLOCO	City	State	Branch	Scrn. Adm.	Category
SHIPTESTVAP	SHIPPER TEST 01	CLVAP	SANTIAGO	SANTIAGO		UNK	0 BUS
CLITESTLCO	CLIENT TEST 01	CLLCO	SANTIAGO	RM		UNK	0 BUS
LADINGJEC	Lading Corporation	USJEC	JERSEY CITY	NJ		UNK	0 BUS
MAELINORF	MAERSK LINE	USORF	NORFOLK	VA		UNK	0 BUS
UNIAIRMDW	UNITED AIRLINES	USCHI	CHICAGO	IL		UNK	0 BUS
PREWORODR	PRESTIGE WORLDWIDE	USODR	OLD BRIDGE	NJ		UNK	0 BUS
INISOFAUS	INITECH SOFTWARE	USAUS	AUSTIN	TX		UNK	0 BUS
GENOLIPMO	GENCO OLIVE OIL	ITPMO	CORLEONE	PA		UNK	0 BUS
DUNMIFSCR	DUNDER MIFFLIN PAPER	USSCR	SCRANTON	PA		UNK	0 BUS
BIGTREGGZ	BIG TREE TOYS	CNGGZ	GUANGZHOU			UNK	0 BUS
COTOCSSU	COTOCO	ITSSU	MANZANO	UD		UNK	0 BUS
ZIMLINMDW	ZIM LINE	USCHI	CHICAGO	IL		UNK	0 BUS

Recent Items:

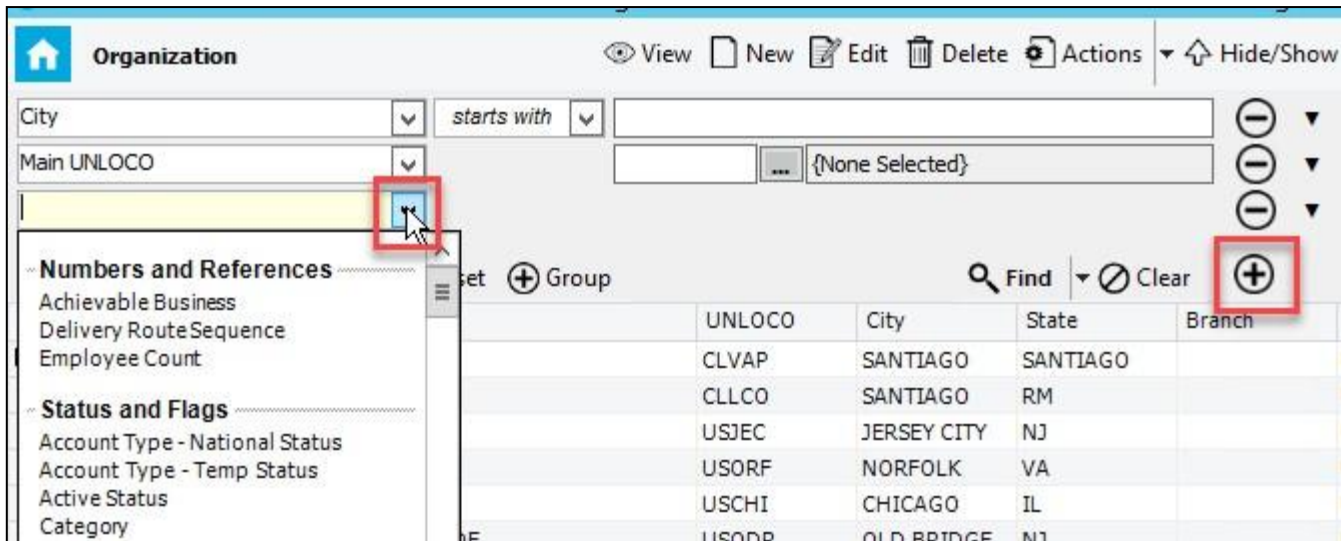
- DUNMIFSCR - DUNDER MIFFLIN PAPER
- INISOFAUS - INITECH SOFTWARE (US)
- ★ PREWORODR - PRESTIGE WORLDWIDE
- ZIMLINMDW - ZIM LINE (USCHI)
- COTOCSSU - COTOCO (ITSSU)
- BIGTREGGZ - BIG TREE TOYS (CNGGZ)
- GENOLIPMO - GENCO OLIVE OIL (ITPMO)

5.1 Filter Options

When using a module with the new filters for the first time, the filter layout may be empty or have a system - defined filter that does not suit your requirements. It is recommended that you create (save) your own filter options, if the user has appropriate permissions, these preferred filters may be published for your company or all companies using the database.

Adding a Filter Strip

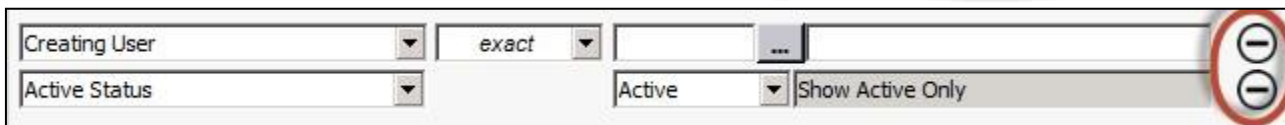
To add a new filter, simply click the drop-down list next to the *<select something to filter by>* field. The list of available filters will display; mouse-click to choose a filter. Alternatively, you can type in the filter's name. The new filter adds to the filter screen.



To add a second filter, simply click the  button to add a new filter strip and repeat the process outlined above to add as many or as few filters as is needed.

Deleting a Filter Strip

To delete a filter, click the  button to the right of the filter that you want to delete. This will remove the filter from the screen.

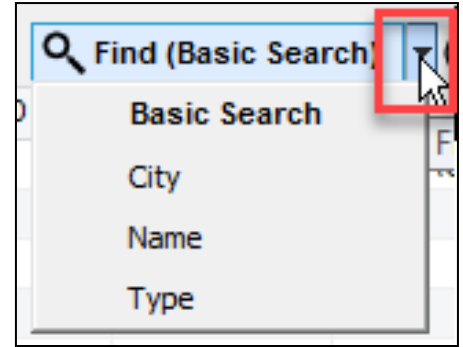


Selecting or Loading a Pre-Saved Filter Layout

Each filter layout you save will be added to the find button's dropdowns list of available filters. You can view your available filters by clicking the small arrow next to the find button. Click on the filter that you wish to load/select to load the filters.



Other users may create filter layouts for you - be sure to look for them!



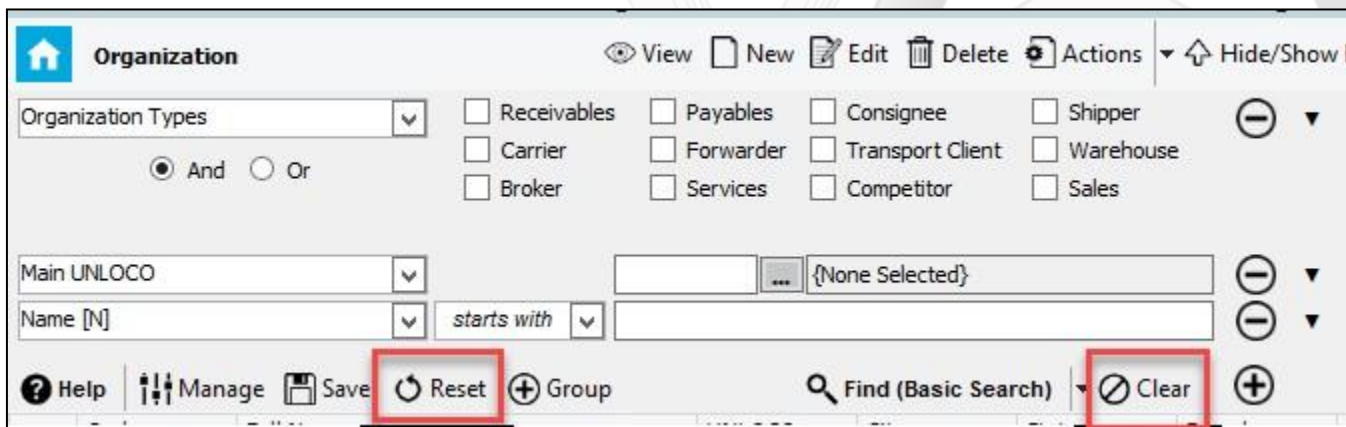
Resetting a Filter Layout

Clicking the **Reset** filter button will reset the current filter layout and remove all filter strips.

The Reset will not delete any saved filter layouts and is generally used when you want to start fresh and create a new filter layout.

Clearing a Filter's Search Criteria

Clicking the Clear button will clear all search criteria. It will **not** remove any of the actual filter strips - it will only clear out the search data. This is used when you want to search using the current filter layout, and want to enter new search criteria.



Save columns with this filter layout

Saves the columns with the selected filter layout.

Filter layouts marked with the set of keys icon have been published to all users by an administrator and can only be renamed or deleted by an administrator.

Changes made via the layouts manager are not saved until you click the **Save** button. Clicking *cancel* at any time allows you to reverse your changes.

Locating Records

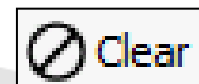
To locate an existing record(s):



- Enter filter information in the filter fields
- Mouse click on the Find button.
- A list of records that match the filter information will be displayed.

Clearing Entered Filters

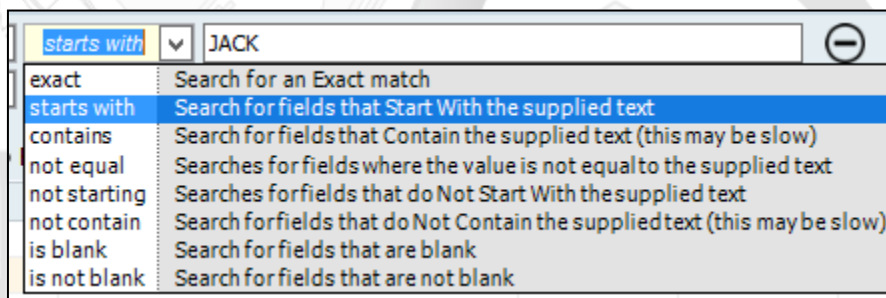
To remove information entered in all filter fields, click on the Clear button. It is recommended users perform this action each time they conduct a search on a new page (to avoid searching against previously used or wrong criteria).



Textual Operators

The 'Starts With', 'Contains', 'Exact', 'Not equal', 'Not Starting', 'Not Contain', 'Is Blank' and 'Is Not Blank' drop-down list is included on many of the search screens. The Starts With option will be selected by default.

Partial information can be entered when adding filter information such as a house bill number or job number. Click to select the appropriate search criteria.



Filter	Description
Exact	Search for an exact match
Starts With	Search for fields that start with the supplied text.
Contains	Search for fields that contain the supplied text
Not Equal	Searches for fields where the value is not equivalent to the supplied text.
Not Starting	Searches for fields that do not start with the supplied text.
Not Contain	Search for fields that do not contain the supplied text.
Is Blank	Search for fields that are blank
Is not Blank	Search for fields that are not blank

“Blue” filter items



Some modules implement a single filter that, when used, will override (effectively ignoring) all other search criteria. This filter is highlighted in **blue** and **bolded** to signify such behavior.

Shipment #	starts with
Active Status	

Search Numbers

The number of existing records matching your search filter information is displayed at the top of the grid. The maximum number of records that will be displayed is 1000.

If your search returns a greater number of records (more than 1000), an error message displays indicating additional search criteria is needed.

If this message is displayed, enter additional filter information to enable a more specific search that will return a lower number of records.

CargoWise One - *** TEST SYSTEM *** - Branch: Lading Corporation - Company: Lading C

Dangerous Goods View New Edit Delete Actions Hide/Show Filters

Help Manage Save Reset Group Find Clear

UN Number Variant Variation Proper Shipping Name IMO Class PG MP Flash Point Sub Lab

Search Results - * TEST SYSTEM *** - Branch: Lading Corporation - Compa...**

More than 1000 records were returned. Please fill in more of the search screen and then click 'Find'.

OK

Found too many records

If you search does not locate any records the following is displayed.

CargoWise One - *** TEST SYSTEM *** - Branch: Lading Corporation - Company: Lading C

Dangerous Goods View New Edit Delete Actions Hide/Show Filters

Code starts with Q

Help Manage Save Reset Group Find Clear

UN Num Variant Variation Proper Shipping Name IMO Class PG MP Flash Point Sub Lab

Search Results - * TEST SYSTEM *** ...**

There are no records that match your search.

OK

Found no records

Slow Searches/Contains

Depending on how your administrator sets up your system, you may receive a pop-up asking if you would like to proceed should you create a “contains” search - while these are extremely useful, they may slow down your system.

Shipments View

Shipment # contains 102

Proof-of-Delivery (POD) information

5.2 Filter Category Groups

Individual field filters can be grouped together into a *Filter Category Group* so every field filter in this group is applied to the search results using OR condition. To do this you can use a *Color Category* to group filters together.

Adding Filters to a Filter Category

To best explain this, we will look at the following example using **Shipment** filters. Using filters we want to find all shipments with:

- A Load Port in the US, and
- The transport mode is either AIR or SEA

To create filter groups:

Add the required filters

The screenshot shows the 'Shipments' filter interface. It has a toolbar with 'View', 'New', 'Edit', 'Copy', 'Deactivate', and 'Actions'. Below the toolbar, there are three filter rows:

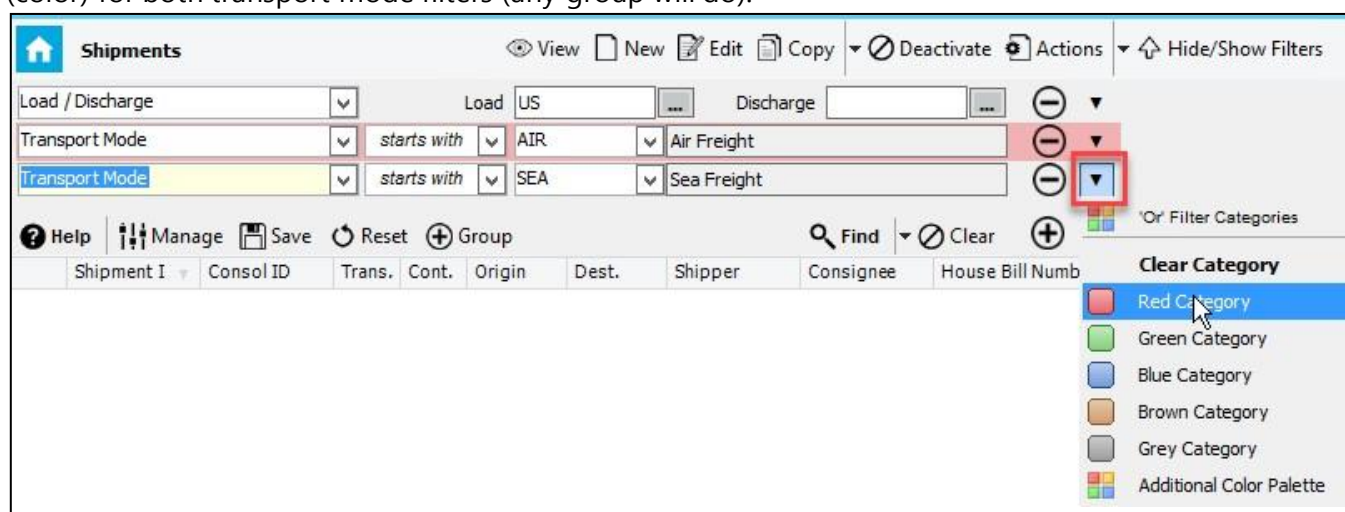
- Row 1: Load / Discharge (dropdown), Load (text: US), Discharge (text:), with minus and expand icons.
- Row 2: Transport Mode (dropdown), starts with (dropdown), AIR (text), Air Freight (text), with minus and expand icons.
- Row 3: Transport Mode (dropdown), starts with (dropdown), SEA (text), Sea Freight (text), with minus and expand icons.

As it is, this filter layout will not return any shipments because the filter says that the transport mode is AIR, and the transport mode is SEA (a shipment can of course have only one transport mode). Therefore without any groups, the filter currently does this:

- Return shipment if Load Port = US and Transport Mode = Air and Transport Mode = Sea

The screenshot shows the 'Shipments' filter interface with the same filters as the previous image. Below the filters, there is a toolbar with 'Help', 'Manage', 'Save', 'Reset', 'Group', 'Find', 'Clear', and a plus icon. Below the toolbar, there is a table with columns: Shipment I, Consol ID, Trans., Cont., Origin, Dest., Shipper, Consignee, House Bill Number, and Master. A red arrow points to a dialog box titled 'Search Results - *** TEST SYSTEM ***' which contains a yellow warning icon and the text 'There are no records that match your search.' with an 'OK' button.

To fix this, indicate that the transport mode can be either AIR or SEA by assigning the transport mode filters a Filter Category Group. Click the  arrow next to each transport mode filter and select the same group (color) for both transport mode filters (any group will do):



The screenshot shows the 'Shipments' filter layout. The 'Transport Mode' filter is selected, and the 'Red Category' is chosen from the dropdown menu. The 'Red Category' is highlighted in blue in the dropdown list.

In the example above, we chose the red category for both:

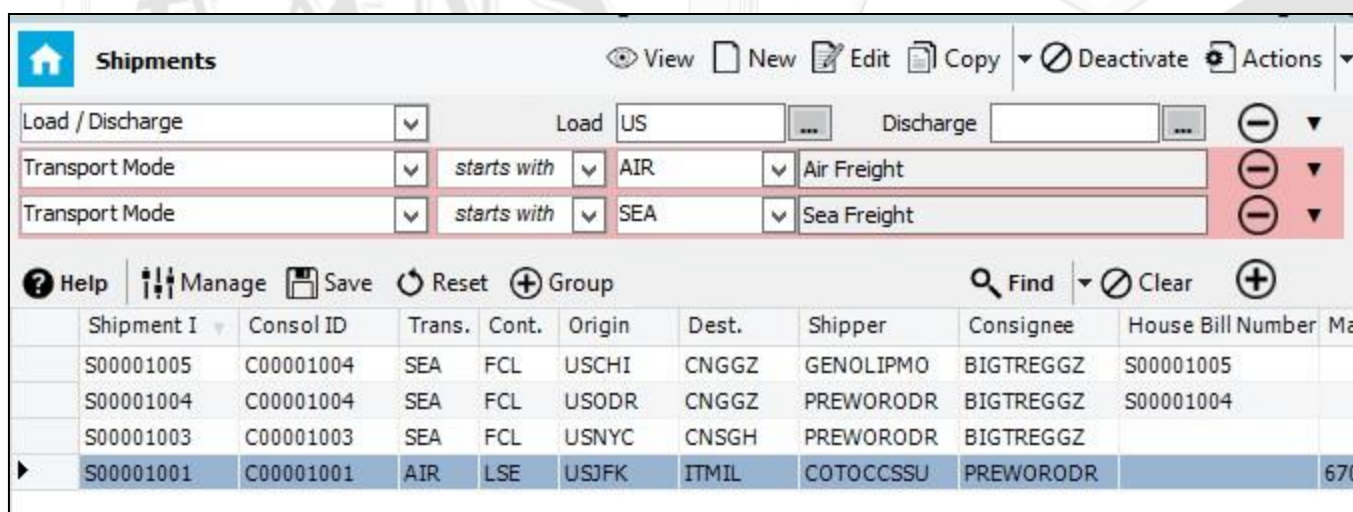
After repeating this step for the second transport mode filter, both filters are in this example now grouped into the *red* category. This is denoted by the red color strip behind the filters



Any color will do, but both filters must be the SAME COLOR in order for the “or” functionality to work.

Grouping the transport modes together has the effect of changing the filter:

The filter layout with the grouping will now find any shipment where the Load Port is in the US and the Transport Mode is either AIR or SEA



Shipment I	Consol ID	Trans.	Cont.	Origin	Dest.	Shipper	Consignee	House Bill Number	Ma
S00001005	C00001004	SEA	FCL	USCHI	CNGGZ	GENOLIPMO	BIGTREGGZ	S00001005	
S00001004	C00001004	SEA	FCL	USODR	CNGGZ	PREWORODR	BIGTREGGZ	S00001004	
S00001003	C00001003	SEA	FCL	USNYC	CNSGH	PREWORODR	BIGTREGGZ		
S00001001	C00001001	AIR	LSE	USJFK	ITMIL	COTOCSSU	PREWORODR		670

After creating your filter layout and choosing your groups, save the filter layout as per usual (**Save Layout** button) and CargoWise One will remember which groups you selected the next time the filter layout is loaded.

○

5.3 Search Screen - Grids

Customize Columns

The columns displayed on any grid in CargoWise One may be customized. This includes the grids on the search screens and within any menu item.

Customizing a grid allows you to select which columns you would like to display and the column display order. This allows you to customize the grid to your viewing preferences. Once customized, the column order will remain as per your customization unless you make further changes.

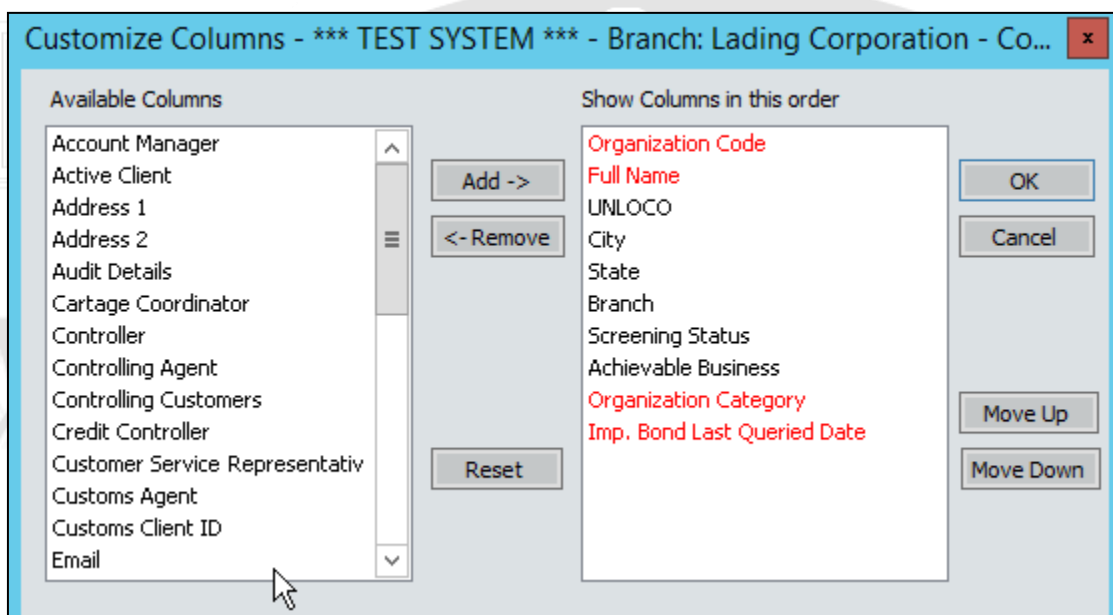
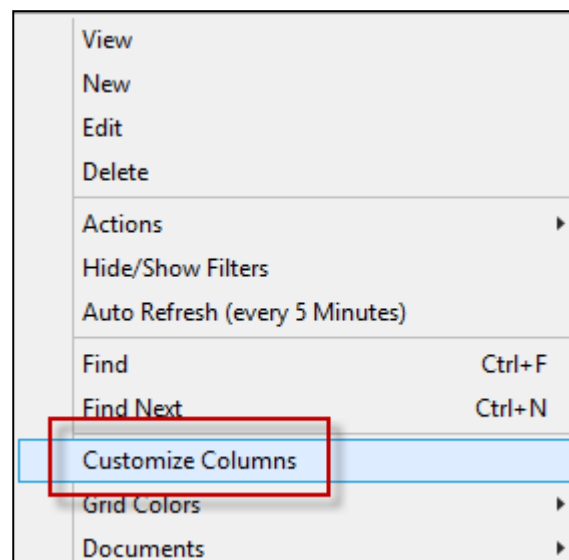
To access Customize Columns, RIGHT CLICK on the grid and select "Customize Columns".

The *Customize Columns* window will be displayed as follows:

There are two sections in the window screen:

Available Columns (left) - lists columns that may be added to the grid

Show Columns in this order (right) - lists the columns displayed and the order in which they appear



Adding and Removing Columns from the Grid

Add a Column to the Grid:

- Within the Available Columns section, highlight the column (field) required
- Select the Add button to move the column to the bottom of the Show Columns section
- Select the OK button to save the change

Remove a Column from the Grid:

- Within the Show Columns section, highlight the column (field) required
- Select the Remove button to move the column to the Available Columns section
- Select the OK button to save the change



You can Add or Remove multiple columns at the same time by using the **Shift** or **Ctrl** keys.

Change the Order of the Columns for Display:

The top to bottom order that the columns listed in the Show Columns section represents the left to right order that the columns are displayed when viewing the grid.

- Highlight the column name you wish to move
- Select the Move Up button to move the column up the list or the Move Down button to move the column down the list
- Select the OK button to save the change



The order can only be moved one field at a time.

Mandatory Fields

It is mandatory to show columns marked in **red** on the grid. However, the display order of mandatory columns may be changed.

Reset Column Order

Use the **Reset** button to reset the *Show Columns* section back to the c1 default.

The *New Grid Color Scheme* window will display as follows:

Enter a Scheme Name.

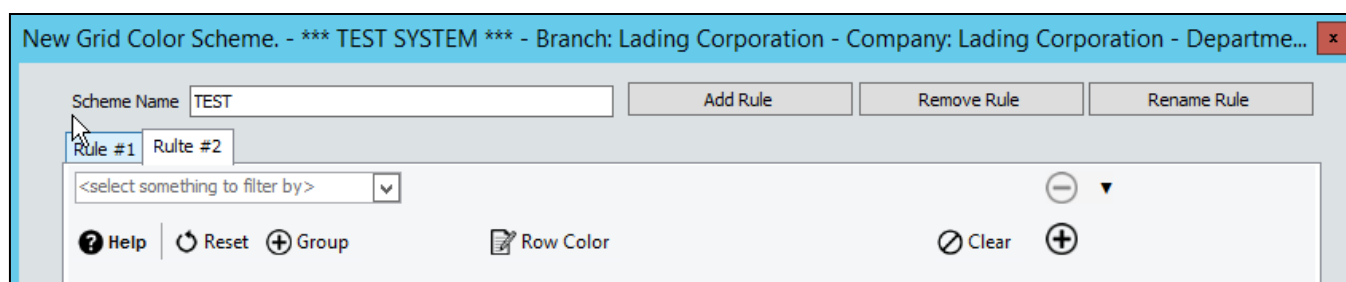
Select the Add Rule button and the New Color Scheme Rule dialog opens.

Create a name for your new rule and select the **OK** button.

Create the new rule and then the system opens an additional nested tab with the name of the rule created.

To create another rule, click the “Add rule” button

Click “Save and Close” when done.



Select Color Schemes

The system colors each of the grid lines per the filter criteria named in the setup. This color scheme is a scheme containing several rules and the system allows a different color for a different set of filters.

If you have created multiple schemes for the same grid, you can select the scheme you wish to apply.

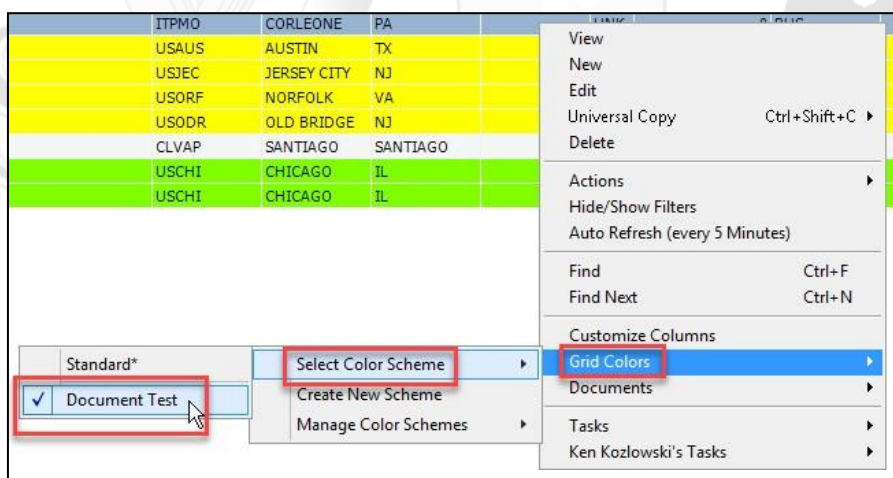
To select a different color scheme:

Select *Grid Colors* > *Select Color Scheme*

From the different schemes to choose from, select the required scheme. The scheme currently applied by the system has a check mark next to it indicating it is active.

You can create as many schemes as you need to visually highlight specific records in your grid results.

Standard Color Scheme: If you select the *Standard* scheme it will return your screen to the standard default settings within the system. For most screens, the default has no color coding.



Manage Color Schemes

You can edit your color schemes. Simply highlight and click on Grid Colors, then highlight and click on Manage Color Schemes and then click on the particular scheme you choose to edit.

The Edit Grid Color Scheme dialog opens. Each of the tabs and their associated filters are available for editing.

Remove Rule

You can remove a rule by clicking on the tab you wish to remove and then clicking on the Remove Rule button.

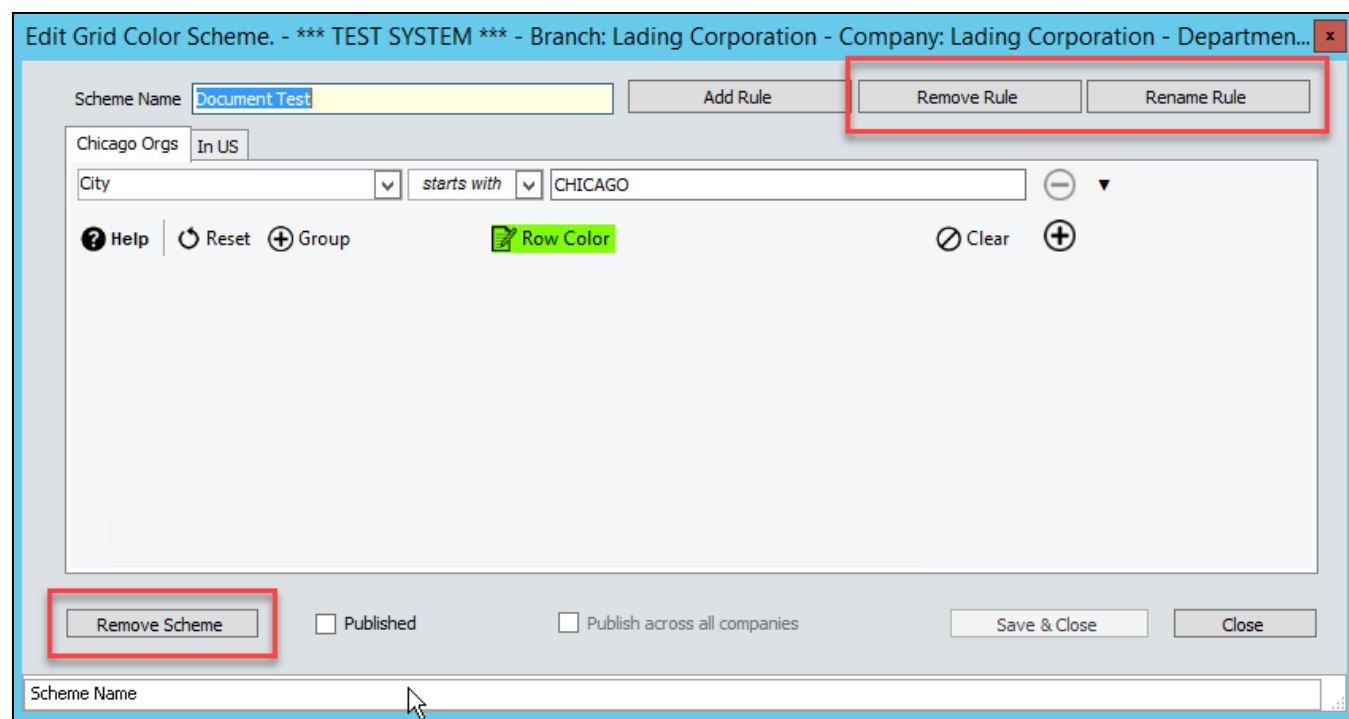
Rename Rule

You can rename a rule by clicking on the tab that you wish to rename then clicking the Rename Rule button.

Enter the name for the rule and click on the OK button. If you decide you are not going to rename the rule at this time, click on the Cancel button.

Remove Scheme

You remove a scheme by clicking on the tab you wish to remove then clicking the Remove Scheme button (bottom left).



VERY IMPORTANT - If multiple rules are created - the first rule created will be the one that is used first. So, using this example, it is critical that the rule “City>Starts With>Chicago” is FIRST, then the rule “Country>Equal to>United States” is second.

The system “reads” all organizations, looks for the ones in Chicago, then colors them green.

It then “reads” all organizations, looks for the ones in the USA, then colors them yellow.

Should the “Country>Equal to>United States” rule been placed 1st - it would have colored all Orgs in Chicago yellow, because they fit the criteria of being in the US.

Multiple Line Selection

Once you have your search result on the grid, you have the ability to select multiple lines to create an action. You can do this using the following

- Holding the Shift and Ctrl keys and clicking row headers;
- Press left mouse button and scroll over several rows without releasing it;
- Press Ctrl+A to select all displayed rows

When making multiple Selections, ALWAYS click in the “gutter” to the right of each line item when making your selections - Multiple Line Selection will NOT work by clicking on the line item.

	Code	Full Name	
	SIGTREGGZ	BIG TREE TOYS	CN
	CLITESLCO	CLIENT TEST 01	CL
	COTOCCSSU	COTOCCO	ITS
	DUNMIFSCR	DUNDER MIFFLIN PAPER	US
	GENOLIPMO	GENCO OLIVE OIL	ITP
	INISOFAUS	INITECH SOFTWARE	US
	LADINGJEC	Lading Corporation	US
	MAELINORF	MAERSK LINE	US
	PREWORODR	PRESTIGE WORLDWIDE	US
	SHITESVAP	SHIPPER TEST 01	CL
	UNIAIRMDW	UNITED AIRLINES	US
	ZIMLINMDW	ZIM LINE	US

5.4 Search Screen - Toolbar

View

View allows you to view the selected record. There are multiple ways to view a record:

- Mouse click on the **View** button at the top of the search screen
- Right mouse click anywhere in the grid and select **View** from the displayed options

The record chosen will appear in view (non-editable) mode.

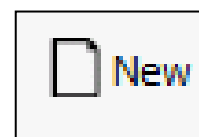


New

There are multiple ways to create a new record:

- Mouse click on the New button at the top of the search screen.
- Right mouse click anywhere in the grid and select new from the displayed options.

Either of these options will display a blank screen for adding a new record.

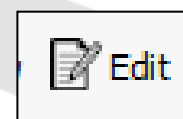


Edit

There are multiple ways to edit a record:

- Double mouse click on the selected record on the grid to open the record.
- Mouse click on the Edit button at the top of the screen.
- Right mouse click anywhere in the grid and select edit from the displayed options.

Any of the above options will open the existing record for editing.



Copy

There are multiple ways to copy a record:

- Mouse click on the **Copy** button at the top of the search screen.
- Right mouse click anywhere in the grid and select copy from the displayed options.



Not all menu options include the copy function and not all fields are always copied to the new record. Fields that are not copied are those that are known to change from record to record, for example, a shipment house bill number.

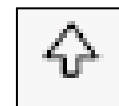
Delete

Not all records can be deleted. Some records such as shipments do not have a delete function and may only be marked as inactive. Not all users will have the ability to delete records.



Hide / Show Filter Functionality

To show/hide filters, select the chevron icon. The filters will be hidden/shown. (You can also right click your mouse in the grid and Hide/Show filters).



Not Hidden:

Organization View New Edit Delete Actions **Hide/Show Filters**

Organization Types ☐ Receivables ☐ Payables ☐ Consignee ☐ Shipper
☐ And ☐ Or ☐ Carrier ☐ Forwarder ☐ Transport Client ☐ Warehouse
☐ Broker ☐ Services ☐ Competitor ☐ Sales

Main UNLOCO {None Selected}

Name [N] starts with

Help Manage Save Reset Group Find (Basic Search) Clear

Code	Full Name	UNLOCO	City	State	Branch	Scrn.	Ach
BIGTREGGZ	BIG TREE TOYS	CNGGZ	GUANGZHOU			UNK	
CLITESLCO	CLIENT TEST 01	CLLCO	SANTIAGO	RM		UNK	
COTOCCSSU	COTOCCO	ITSSU	MANZANO	UD		UNK	
DUNMIFSCR	DUNDER MIFFLIN PAPER	USSCR	SCRANTON	PA		UNK	
GENOLIPMO	GENCO OLIVE OIL	ITPMO	CORLEONE	PA		UNK	
INISOFAUS	INITECH SOFTWARE	USAUS	AUSTIN	TX		UNK	
LADINGJEC	Lading Corporation	USJEC	JERSEY CITY	NJ		UNK	
MAELINORF	MAERSK LINE	USORF	NORFOLK	VA		UNK	
PREWORODR	PRESTIGE WORLDWIDE	USODR	OLD BRIDGE	NJ		UNK	
SHITESVAP	SHIPPER TEST 01	CLVAP	SANTIAGO	SANTIAGO		UNK	
UNIAIRMDW	UNITED AIRLINES	USCHI	CHICAGO	IL		UNK	
ZIMLINMDW	ZIM LINE	USCHI	CHICAGO	IL		UNK	

Hidden:

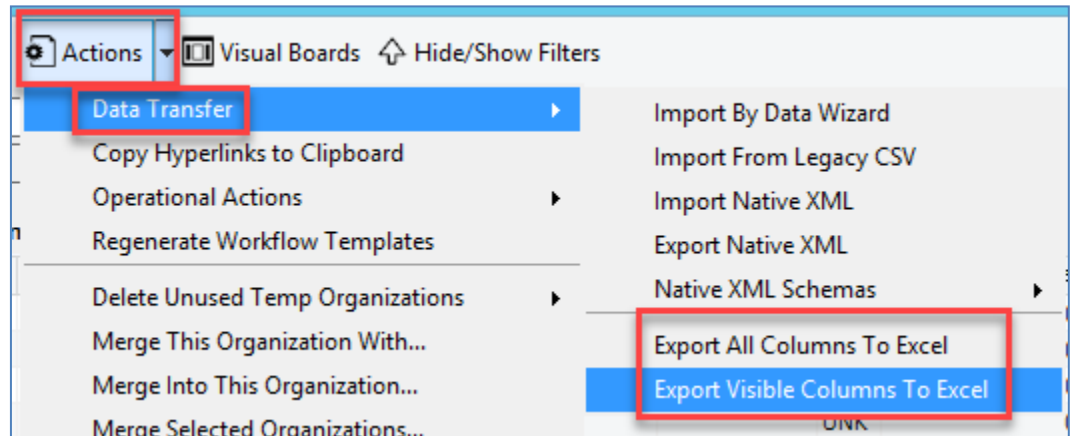
Organization View New Edit Delete Actions **Hide/Show Filters**

Code	Full Name	UNLOCO	City	State	Branch	Scrn.	A
BIGTREGGZ	BIG TREE TOYS	CNGGZ	GUANGZHOU			UNK	
CLITESLCO	CLIENT TEST 01	CLLCO	SANTIAGO	RM		UNK	
COTOCCSSU	COTOCCO	ITSSU	MANZANO	UD		UNK	
DUNMIFSCR	DUNDER MIFFLIN PAPER	USSCR	SCRANTON	PA		UNK	
GENOLIPMO	GENCO OLIVE OIL	ITPMO	CORLEONE	PA		UNK	
INISOFAUS	INITECH SOFTWARE	USAUS	AUSTIN	TX		UNK	
LADINGJEC	Lading Corporation	USJEC	JERSEY CITY	NJ		UNK	
MAELINORF	MAERSK LINE	USORF	NORFOLK	VA		UNK	
PREWORODR	PRESTIGE WORLDWIDE	USODR	OLD BRIDGE	NJ		UNK	
SHITESVAP	SHIPPER TEST 01	CLVAP	SANTIAGO	SANTIAGO		UNK	
UNIAIRMDW	UNITED AIRLINES	USCHI	CHICAGO	IL		UNK	
ZIMLINMDW	ZIM LINE	USCHI	CHICAGO	IL		UNK	

5.5 Exporting Search criteria to Excel

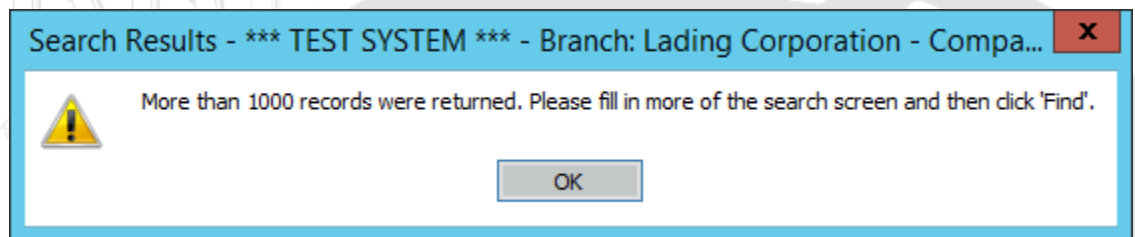
To export a grid to excel (with proper security rights) go to Actions> Data Transfer> Export to Excel

You will have 2 choices: Visible columns (only the columns shown on the grid) and All Columns.

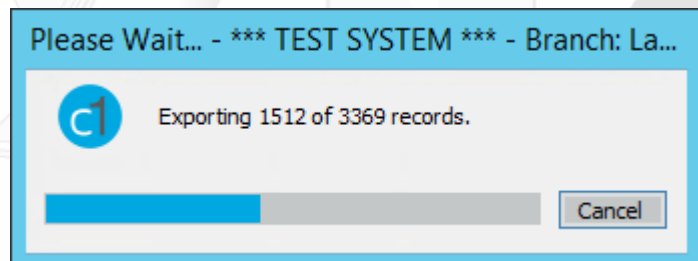


More than 1,000 records

As you may know search criteria of over 1,000 records can not be shown in a grid - BUT you can still export this to excel. When the box below appears, simply click "OK", then follow the steps illustrated above.



A screen similar to the one on the right will appear before the excel spreadsheet appears:



6 Miscellaneous Functions, Additional Detail and Hints and Tips:



6.1 Live vs. Test Databases

You may have both a live and test database - always configure your settings in the LIVE database, which can then be transferred to the test database.

6.2 Search Button – Additional Detail

The search button allows you to search against reference files.

To open a reference file with the search button, either:



- Mouse click on the button,
- Press the F4 function key on the field that the *search* button is attached to.

The reference file search screen will then be displayed. From the displayed search screen:

- Enter information in the search filters
- Click on the Find button to display a list of records that match your filters.
- Locate the required record in the list displayed to the grid.

To return the selected record to the field that you searched from either:

- Double click on the required record in the grid or
- Mouse click on the record in the grid to highlight it then mouse click on the OK button.

Example



Let's review the search button in the organization record to the right:

Organization Code:	INISOFPAR	Screen
Full Name:	INITECH SOFTWARE	
Main Address:	1060 W ADDISON	
Main Address 2:		
City:	PARIS	
Post Code:	12345	
UNLOCO:	FRPAR	Paris
State:	02	

If I were to click on the UNLOCO search button, the screen below will appear:

View	New	Edit	Deactivate	↑
Code	starts with	FRPAR		
Help	Manage	Save	Reset	Group
			Find	Clear

Notice that, because data was entered in the search box, it defaults to the search screen....were we to click the "find" button, only information related to FRPAR UNLOCO would appear. You may still add/edit and filters to search for the information you are looking for.

6.3 Calendar Function – Additional Detail

Calendar search functions are available on fields followed by the calendar symbol.

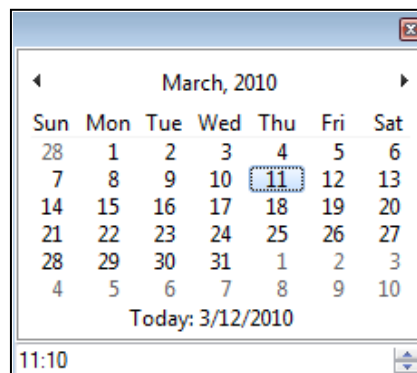


To open the calendar, either click the calendar symbol or press the F4 function key.

If you open the calendar on a blank field, the current month is displayed with the current day highlighted.

To select a date and default the date back to the date field:

- Click on the required date, or
- Use the forward / back, up and down arrows on the keyboard to highlight the required date and press the **Enter** key
- Click the arrows to the left and right of the month to display the previous and next month calendars.
- If you open the calendar on a field that has a date entered, the calendar will be positioned on the entered date.
- If you open the calendar on a field that also allows entry of time, the time section is included at the bottom of the calendar.



To adjust the time:

Click into the time section, then type in the date or click on the hours or minutes, then mouse click on the up / down arrows to adjust the time as needed.

Press the enter key to revert default date / time back to the field where you opened the calendar.

To adjust the time using the keyboard: Use the forward / back arrow keys to move between the hours and minutes.

Use the up / down arrows on the keyboard to adjust the hours or minutes or enter the time.



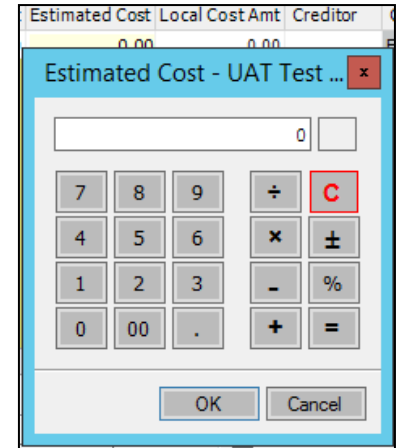
Press the enter key to default date / time to the original field from which the calendar was opened.

6.4 Calculator Function

The calculator is available in numeric fields. To display the calculator press the F4 function key in any numeric field.

Click the **OK** button to default a calculated total back to the field you displayed the calculator from.

Click the cancel button or press ALT + C to close the calculator function.



6.5 Ctrl+0 From the Billing screen

Clicking your Control key and “0” provides you with a quick calculate function which allows you to populate by units of measure and enter cost and sell information simultaneously. Click “OK” when done.

Measurement Basis	Package	5.000
☒ Update Cost	Rate	10.000
	Total Cost	50.00
☒ Update Sell	Rate	15.000
	Total Sell	75.00
☐ Is Minimum		

6.6 F3 from within a record

Clicking the F3 button from within a record (In this example - INSIDE the Organization code) will open that record

The screenshot displays the 'Edit Organization' interface for 'RICPICJAX / RICK'S PICKLES'. The left sidebar contains sections for 'Mode', 'Shipper', 'Consignee', and 'Local Client'. The 'Consignee' section is highlighted with a red box, and a red dotted arrow points from the 'F3' button (located next to the 'RICPICJAX' code) to the 'Organization Code' field in the main form. The main form contains various fields for organization details, including 'Organization Code', 'Screening', 'Organization Category', 'Full Name', 'Additional Address Info', 'Address 1', 'Address 2', 'Country', 'City', 'Post Code', 'State', 'UNLOCO', 'Controlling Branch', 'Phone', 'Mobile', 'Fax', 'Email', and 'Website URL'.

Left Sidebar:

- Mode:** Transport: SEA (Sea Freight), Container: LCL (Less Container Load), Type: STD (Standard House).
- Shipper:** SETCHISNZ, Override: ☐, ACI Zone: [dropdown].
- Consignee:** RICPICJAX, Override: ☐, ACI Zone: [dropdown]. **F3** button is present.
- Local Client:** RICPICJAX, Contacts, Addr.

Main Form:

- Organization Code: RICPICJAX
- Screening: UNK (Unknown)
- Organization Category: BUS (Business)
- Full Name: RICK'S PICKLES
- Additional Address Info: [empty]
- Address 1: 6019 SHADEHILL RD
- Address 2: [empty]
- Country: US, City: JACKSONVILLE
- Post Code: 32258, State: FL (Florida)
- UNLOCO: USJAX, Jacksonville
- Controlling Branch: JAX, Jacksonville
- Phone: +1 904-867-5309, (904) 867-5309
- Mobile: [empty]
- Fax: [empty]
- Email: info@pickderick.com
- Website URL: [empty]

6.7 “Control + E” to add your own email

To add your own email to a document or report - simply hold down the Control Key and the letter “E” key

Organization	Name	Deliv	Type	E-Mail Address/Fax	Email CC
GENOLIPMO	Vito Corleone	E-Mail	PDF	vito@genco.com	
		E-Mail	PDF	jkozowski@ladingcorporation.com	



The email address used will be based on user sign in: If this does not work confirm 2 things:

- 1) You are logged in correctly (your name)
- 2) Your login contains your email address (Confirm at Maintain>User Admin>Staff and Resources)

6.8 Validate All

Inside various functionalities, you can use Validate All from the file menu. This will trigger the system to perform a background validation of all the fields on the form you are working with. Mandatory fields highlight with the red stop symbol.

File Edit Actions Customs Messaging Documents Help

New Ctrl+N

Validate All

Save Ctrl+S

Save & Close Ctrl+Shift+S

Delete

Close Ctrl+Q

Address 1 [Red Stop Symbol]

Address 2 [Red Stop Symbol]

Country US City [Red Stop Symbol]

Post Code [Red Stop Symbol] State [Red Stop Symbol]

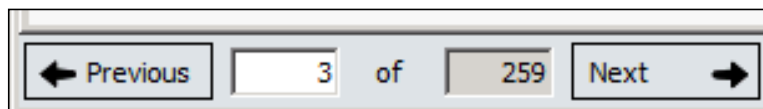
UNLOCO [Red Stop Symbol] {None Selected}

Validate All is a system functionality and may not reflect all Your Company required fields

**THINK
BE
CAREFUL**

6.9 Previous / Next Function

The previous / next buttons are displayed at the bottom of some WiseTech screens.



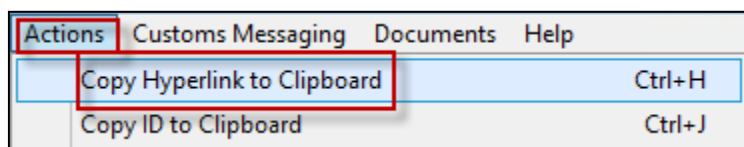
The previous button will display the record prior to the record you have opened.

The next button will display the next record after the record you have opened.

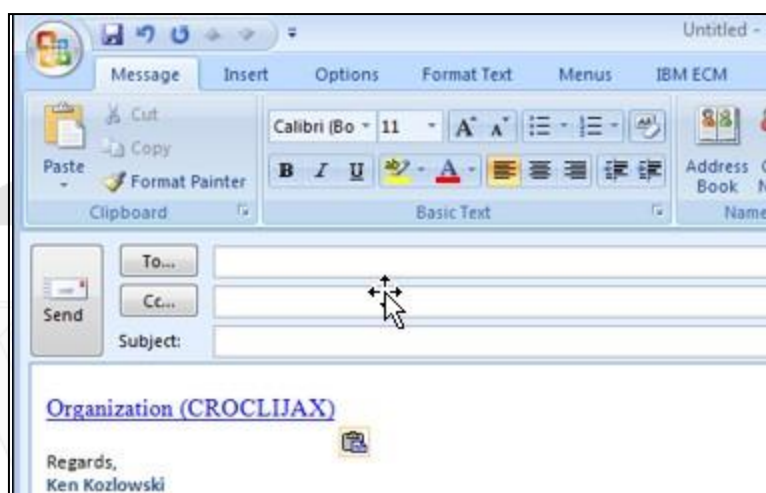
The records that will be displayed are limited to the records that match the filters entered on the search.

6.10 Copy Hyperlink to Clipboard

To copy hyperlink to clipboard, open the record you want to copy and then click on the actions menu bar and select *Copy Hyperlink to Clipboard*.



Once you have copied the hyperlink, paste the hyperlink into an email (Microsoft Outlook) and send to other team members of your organization. The hyperlink will not work correctly unless WiseTech is running on the email recipient's workstation in the same company the link was created in.



6.11 Warnings in dialog boxes

The following messages display in dialog boxes and relate to records being edited by two or more users simultaneously.

Another session is editing the same information

This message displays if another user is currently modifying the record you are trying to edit. You can click **OK** and continue editing it, but the changes may not be saved if the other user saves his or her changes first.



Warning – User has made changes

This message displays if you and another user have made changes simultaneously to a record and the other user saved the record first. Click **OK** to merge the changes. Then a series of warning message icons  display to allow you to review the merged changes before saving.

Conflicts in critical fields

If the changes made by both users involve critical fields, the system cannot automatically merge the changes and displays this message. To resolve this message, you must cancel your changes, reload the form, and re-enter the edits. Critical fields include, but are not limited to, accounting, customs responses, and failure to read notes records.

