N4 Booking Training Document

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Typographical Conventions

The following lists the typographical conventions used in this training document:

💡 Presents a suggestion that may simplify or explain a procedure.

 fileInfo icon Indicates a menu path or a menu name in the SPARCS N4 user interface

For example, in the Operations work mode, select the Unit menu and then the Units option to display the Units view.

 dévelopmen user Interface

_operations user Interface

Operations ➔ Unit ➔ Units

Indicates a menu path or a menu name in the SPARCS N4 user interface

For example, in the Operations work mode, select the Unit menu and then the Units option to display the Units view.

**Bold Type** Presents an item which is important and it maybe defined in the current Training Document or N4 Glossary of Terms

[Hyperlink](#) within the current document or to an email address

1. **Click** Presents a key to the visual display of items or instructions
Additional Training

VIT recommends that you have:
1. a solid understanding of basic computer operation
2. ability to perform basic computer navigation
3. ability to perform Microsoft Windows task

VIT requires you to complete the below VIT courses prior to taking this course.

1. N4 Basic Terminology for Community
2. N4 Basic Navigation

VIT recommends you to complete the below VIT courses after to taking this course.

1. N4 Booking Inspector
2. N4 Booking Error Messages
3. N4 Hazards
4. N4 Pre-advised
5. N4 Service Event Training Document

Direct questions or comments to your instructor or email VIT at CustomerService@vit.org
What is and Why use Booking

- Booking is used to authorize delivery of empty containers for stuffing and receiving of a full container load (FCL) export container under the same booking number. Also, the receiving of export containers not delivered from VIT under the booking number.
- The Line Operator creates the Booking in N4
  - Most Booking will be created via EDI
  - Line Operator can add, edit or delete booking manually in N4.
  - This Training Document is only the manual process using the N4 user interface
- The Line Operator instructs the Trucking Company on what, when and where to pickup and deliver the container.
- The Trucking Company request equipment at the in gate using the Booking or equipment number.
- VIT selects the appropriate equipment and provides it to the Trucking Company.
- The Trucking Company receives a TIR at the out gate.
- The Trucking Company delivers the export container to the facility at the in gate.
- VIT receives the container and places it on the facility for vessel loading
- The Trucking Company receives a TIR at the out gate.
EDI Booking Instructions

• The EDI 301 booking message is used to provide all the information necessary for an ocean carrier to confirm and reserve space and equipment availability.

• The booking includes the booking number, outbound vessel visit, load port, discharge port, shipper and consignee. For each booking, the EDI message includes a list of equipment types specifying the number of containers for each type and any commodity requirements.

• An EDI booking must have a valid Vessel visit and include a discharge port that is in the service for the vessel.

• A generic booking can be used for repositioning empties, or when the vessel hasn’t yet been determined.

• Email Tracy Hassell at thassell@vit.org for more information on how to create an EDI generic booking.
Operation>Gate>Bookings>Bookings View

The Bookings view displays the Bookings that exist at the current scope level. You can add, edit, and delete Bookings from this view. You can create a filter to limit the data displayed, such as displaying only bookings for a specific vessel.

To add a new record Click:

To edit or delete a record:

1. In list view, select the record(s) that you want to edit or delete.

2. Do one of the following:
   - Click to edit a selected record
   - Click to delete a selected record

Depending on the list view, when you double-click a record in list view, SPARCS N4 either an inspector that displays more details for the selected record or a form that enables you to edit the record.

💡 The Add, Edit and Delete commands are also available on the shortcut menu for the list view. To access the shortcut menu, right-click the selected record.

If the functionality is not available or you do not have a role with the associated privileges, the are unavailable.
Booking form: Navigate to

1. CLICK Operations > Gate > Booking
2. Opens Booking list view
3. Click Add Button (+)
4. Click Edit Button (after highlighting Booking number)
5. Opens Booking form

![Booking form interface]

N4 Booking Training Document

11/21/2013
Booking form:

The **Booking** form enables you to add and edit bookings. Most line operators use EDI to send bookings, but you can use the **Booking** form to:

- Add bookings for line operators that do not use EDI
- Edit bookings such as changing the routing information (**rolling the booking**) 

Line Operators are assign privileges so that they can use the **Booking** form to add, edit, or delete bookings.

Use bookings in SPARCS N4 to control the number and type of empty containers dispatched to a warehouse to be stuffed, and the containers received to be loaded on a vessel. The containers received against a booking will inherit the booking’s routing information.

**Instructions on next pages**

![Booking form diagram]

- **1**: Number
- **2**: Vessel Visit
- **3**: Port of Discharge
- **4**: Optional PCD-1
- **5**: Client Ref. Number
- **6**: Freight Kind
- **7**: Shipping Mode
- **8**: Category
- **9**: Export
- **10**: Booking Items
To Add or Edit a Booking:

1. In the Number field, enter a booking number that identifies the booking. A booking number must be unique per line operator.

2. From the Line Operator lookup field, select the line operator for the booking.

3. From the Vessel Visit lookup field, select the vessel visit for the booking. The values displayed in the Vessel Visit lookup field depend on the line operator selected in step 2.

   The system allows you to select Departed vessel visits to update erroneous bookings, but displays a note after saving the changes made to the booking.

   ❗️ You cannot select a Canceled, Closed, or Archived vessel visit.

4. From the Port of Load lookup field, select the port where the container will be loaded on the ship.

   By default, SPARCS N4 selects the current facility as the port of load. However, you can select any routing point as the POL; SPARCS N4 does not validate the POL against the port rotation of the outbound carrier.

   📃 If you change the routing information, such as Vessel Visit, Port of Load, or the Port of Discharge to roll a booking, SPARCS N4 rolls the associated units.

5. From the Port of Discharge lookup field, select the port where the container will be discharged.

   The ports listed in the Port of Discharge lookup field are based on the itinerary of the vessel visit selected in step 3.

   📃 If the Vessel Visit specified in step 3 is for a non-operational facility, SPARCS N4 displays all the routing points in the Port of Discharge lookup field.

6. Specify optional information such as a second port of discharge, optional port of discharge, shipper, consignee, origin, and destination for the booking.

7. From the Freight Kind drop-down list, select the freight kind for the container that will be received against the booking:
   - Empty: Empty container.
   - FCL: Full Container Load.
   - LCL: Less-than Container Load.
   - B-bulk: Break Bulk [Do Not Use].

N4 Booking Training Document
8 From the **Category** drop-down list, select the booking category, either **Export** (default) or **Domestic**.

- If you change the category of an existing booking, SPARCS N4 does not change the category of any full containers already received against the booking. In this case, these containers display in the **Bkg Discrepancies tab, refer to N4 Vessel Training Document (Vessel Inspector)**.

9 Specify optional information, such as dray status, special stow, out of gauge, and hazards for the containers received against the booking.

10 Click **Save**.

You must save a new booking before you can add booking items or record events for the booking.

- When you edit booking details, such as routing, booking items, or commodity details, or when SPARCS N4 receives or delivers a container against a booking, SPARCS N4 records these events in the **History, Events tab** in the **Booking Inspector**.
### Field Label | Description
--- | ---
**Second Port of Discharge** | Select a second port of discharge for the container. The lookup list displays only the routing points defined at the current scope level. To add a new routing point, Email VIT customerservice@vit.org.

**Optional POD-1** | Select the optional port of discharge for the container.

**Trucking Company** | Select the trucking company you want to assign to the booking. If you input a Trucking Company, then ONLY that Trucking Company will be given the equipment for the Booking. The Trucking Company ID must match what is input by the gate clerk.

**Shipper** | Select the shipper for the container. In addition to selecting a value from the lookup field, you can also enter a new value in the **Shipper** field. If you enter a new shipper name, SPARCS N4 creates a new shipper record and displays it in the **Shippers & Consignees** view.

**Consignee** | Select the consignee for the container. In addition to selecting a value from the lookup field, you can also enter a new value in the **Consignee** field. If you enter a new consignee name, SPARCS N4 create a new consignee record and displays it in the **Shippers & Consignees** view.

**Origin** | Enter the origin of the cargo associated with the booking.

**Destination** | Enter the destination for the equipment being picked up.

**Agent** | Select the agent for the booking. In addition to selecting a value from the lookup field, you can also enter a new value in the **Agent** field. If you enter a new agent, SPARCS N4 creates a new agent record and displays it in the **Agents** view.

**Client Ref. Number** | Enter the reference number specified by the client.

**Dispatch Reserved** | Select one of the following from the drop-down list: • **“-”** To dispatch any available equipment associated with the Booking. • **Dispatch Reserved Equipment FIRST**: To dispatch equipment that you reserved against the booking, first. If reserved equipment is not available, XPS selects non-reserved equipment from the yard for the booking item. • **Dispatch Reserved Equipment ONLY**: To dispatch only the equipment that you reserved against the booking. If reserved equipment is not available, SPARCS N4 displays an error. This will be enforced at the gate.
<table>
<thead>
<tr>
<th>Field Label</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Owned/Leased</td>
<td>Select one of the following from the drop-down list:</td>
</tr>
<tr>
<td></td>
<td>• &quot;—&quot; To dispatch any available equipment associated with the Booking</td>
</tr>
<tr>
<td></td>
<td>• <strong>Owned Only:</strong> To dispatch only the equipment owned by the line operator associated with the booking.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Leased Only:</strong> To dispatch only the equipment leased by the line operator associated with the booking.</td>
</tr>
<tr>
<td></td>
<td>This is enforced at the gate.</td>
</tr>
<tr>
<td>Shipping Mode</td>
<td>Select the shipping mode for the booking.</td>
</tr>
<tr>
<td>Override Cutoff</td>
<td>Select the check box if you want to ignore the cutoff date and time for the associated carrier visit. VIT ignores the cutoff date at this time.</td>
</tr>
<tr>
<td>Dray Status</td>
<td>Select the dray status for the containers associated with the booking.</td>
</tr>
<tr>
<td>Hold Partialis</td>
<td>Select the check box if you do not want XPS to load containers associated with the booking until you have received all the containers associated with the booking. When checked, SPARCS N4 places a permission on each container as it arrives at the gate; this prevents XPS from loading the container.</td>
</tr>
<tr>
<td>Special Stow</td>
<td>Select any special stow requirements that apply to the container. The lookup list displays only the special stow codes that exist at the current scope level. To add a new special stow code, use the Special Stow form.</td>
</tr>
<tr>
<td>Prevent Type Substitution</td>
<td>Select the check box to prevent equipment type substitution for the booking.</td>
</tr>
<tr>
<td></td>
<td>For example, you may have an equipment type equivalent defined that groups 40’ standard and 40’ high cube containers together. If you define an order item for 40’ standard containers and do not select the Prevent Type Substitution check box, SPARCS N4 treats the 40’ standard and 40’ high cube containers as equivalents and allows you to dispatch either a 40’ standard or a 40’ high cube container against the booking.</td>
</tr>
<tr>
<td></td>
<td>However, if you want SPARCS N4 to dispatch only 40’ standard containers against the booking and not 40’ high cube containers, select the Prevent Type Substitution check box.</td>
</tr>
<tr>
<td></td>
<td>For more information on setting up equipment type equivalents, email VIT at <a href="mailto:customerservice@vit.org">customerservice@vit.org</a>.</td>
</tr>
<tr>
<td>Stow block</td>
<td>Enter a character that designates the stow block on a vessel where the arriving containers will be stowed.</td>
</tr>
<tr>
<td>Empty Pickup Location</td>
<td>Enter the location from where the driver must pick up empty containers if the empty containers are not provided by the facility where the vessel is being loaded.</td>
</tr>
<tr>
<td>Hazards</td>
<td>Click Add Hazards to specify hazards, if the booking is for hazardous cargo. Refer to N4 Hazards Training Document.</td>
</tr>
<tr>
<td></td>
<td>This is enforced at the gate.</td>
</tr>
<tr>
<td>Full Return Location</td>
<td>Enter the location where the driver must return full containers after they have been stuffed.</td>
</tr>
<tr>
<td>Stuffing Location</td>
<td>Enter the location where the driver must deliver an empty container for stuffing.</td>
</tr>
<tr>
<td>Latest Date</td>
<td>Enter the latest date the equipment is allowed to be picked up for the booking. The trucking company must pick up the equipment on or before the date entered in the Latest Date field. This is enforced at the gate.</td>
</tr>
<tr>
<td>Notes</td>
<td>Enter any miscellaneous notes for the booking.</td>
</tr>
<tr>
<td></td>
<td>You can enter a maximum of 180 characters in this field.</td>
</tr>
</tbody>
</table>
Booking Items tab

The Booking Items tab displays the booking items associated with the selected booking and some details for each booking item, such as:

- **Qty**: The number of export or transship containers that SPARCS N4 can receive for the selected booking.
- **Tally In**: The number of export and transship containers that SPARCS N4 has received in the facility or are assigned against the selected booking. This includes containers that are no longer in the facility, except for dray-off containers with a dray status of **Return to Shipper** that were delivered by truck.

If the **Tally In** number plus the number of pre-advised containers equals the value in the **Qty** column, then the booking item is said to be **full**.

- **Tally Out**: The number of empty import or empty storage containers that SPARCS N4 has delivered for the selected booking.

On the **Booking Items** tab, you can add new booking items or edit and delete existing booking items.

1. **Open Booking view form Click Edit or Add Button**
2. **Opens Add or Edit Booking form**
3. **Booking Items tab at bottom**
4. **Click Add or highlight entry and click Edit Button**
5. **Opens Add or Edit Booking Item form**
Booking Items form: Add or Edit

Booking Item form

Operations ➔ Gate or Vessel ➔ Bookings ➔ Bookings view ➔ Booking form ➔ Booking Items tab ➔ Booking Item form

The Booking Item form enables you to specify the quantity and the type of equipment that can be reserved and delivered, or pre-advised and received for a booking. A booking can have multiple booking items but each booking item must have a different equipment type as defined by the length (size), ISO Group (type), and height of the equipment.

To add or edit a booking item:

1. In the Quantity field, enter the maximum number of equipment of a specific type that you want to process against the selected booking.

2. Optionally, from the Equipment Type lookup field, select the equipment type for the booking item.

   The lookup field displays the equipment types that exist at the current scope level. To add a new equipment type, contact VIT at customerservice@vit.org

   ☝️ When you select an equipment type, SPARCS N4 automatically fills in the Length, Height, and ISO Group fields.

3. If you do not select the Equipment Type in step 2, you must manually select the Length, Height, and the ISO Group for the booking item.

   However, if you select an Equipment Type in step 2, you cannot edit the values in the Length, Height, and ISO Group fields.

4. Enter optional equipment and commodity information such as the grade, material, commodity code, temperature and humidity requirements, and ventilation requirement and the unit for specifying the ventilation requirement.

5. Optionally, in the Serial Ranges tab, enter the equipment serial ranges you want to associate with the booking item.

6. Click Save to save the booking item.

You must save a new booking item before you can reserve or pre-advice equipment, of the selected type, against the bill of lading.
Booking Items form: Required Fields

1. Quantity
2. Equipment Type
   **OR**
3. Length, Height and ISO Group
4. Optional information – See next page
5. Save
<table>
<thead>
<tr>
<th>Field Label</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sequence Nbr</td>
<td>Enter a sequence number that uniquely identifies the booking item. The sequence number must be unique for each booking item in the bill of lading.</td>
</tr>
<tr>
<td></td>
<td>If a sequence number is specified, when a user updates a booking item, SPARCS N4 records the event history including the sequence number in the <strong>Notes</strong> column. This helps you identify which booking item was updated against the event history record.</td>
</tr>
<tr>
<td>Tally Limit</td>
<td>Enter the maximum number of equipment of the specified type that can be delivered against the booking item.</td>
</tr>
<tr>
<td></td>
<td>The <strong>Tally Limit</strong> must be less than or equal to the <strong>Quantity</strong> specified for the booking item.</td>
</tr>
<tr>
<td></td>
<td>Once the tally limit is reached, no more containers of the specified type can be delivered against the booking item unless the tally limit is manually changed to a higher value or set to 'Null'. This enables you to restrict the number of equipment, of a specific type, that can be delivered against the booking item at any given time.</td>
</tr>
<tr>
<td></td>
<td>If the <strong>Tally Limit</strong> field is not set or is 'Null', then the value in the <strong>Quantity</strong> field determines the maximum number of equipment that can be delivered against the selected booking item.</td>
</tr>
<tr>
<td>Receive Limit</td>
<td>Enter the maximum number of equipment of the specified type that can be received against the booking item.</td>
</tr>
<tr>
<td></td>
<td>The <strong>Receive Limit</strong> must be less than or equal to the <strong>Quantity</strong> specified for the booking item.</td>
</tr>
<tr>
<td></td>
<td>The <strong>Receive Tally</strong> is set to zero in the BOOKING EDI messages for EDOs set the <strong>Receive Tally</strong> to zero.</td>
</tr>
<tr>
<td>Field Label</td>
<td>Description</td>
</tr>
<tr>
<td>------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Grade</td>
<td>Select a grade for the equipment that you may receive or deliver against the booking item. The lookup field displays only the equipment grades defined at the current scope level. To add a new equipment grade, email VIT at <a href="mailto:customerservice@vit.org">customerservice@vit.org</a></td>
</tr>
<tr>
<td>Material</td>
<td>Select the material of the equipment reserved or delivered against the selected booking item.</td>
</tr>
<tr>
<td>Accessory Type</td>
<td>Select the accessory type that must be associated with the equipment reserved or delivered against the selected booking item. The drop-down list displays only the equipment types for class Accessory that exist at the current scope level. To add a new accessory type, email VIT at <a href="mailto:customerservice@vit.org">customerservice@vit.org</a></td>
</tr>
<tr>
<td>Feature</td>
<td>Select a feature or desired physical characteristic for the equipment received or delivered against the booking item. The lookup field displays only the equipment features defined at the current scope level. To add a new equipment feature, email VIT at <a href="mailto:customerservice@vit.org">customerservice@vit.org</a></td>
</tr>
<tr>
<td>Commodity</td>
<td>Select a commodity code from the lookup field. The lookup field displays only the commodity codes that exist at the current scope level. To add a new commodity code, email VIT at <a href="mailto:customerservice@vit.org">customerservice@vit.org</a></td>
</tr>
<tr>
<td></td>
<td>You cannot select hazardous commodity for the booking item if the selected booking item does not have any hazards defined.</td>
</tr>
<tr>
<td>Gross Weight (Kg)</td>
<td>Enter the gross weight for the equipment that you may receive or deliver against the booking item. To enter weight using a specific unit, type the standard unit symbol, such as lb (pounds), mt (metric ton), lt (long ton), or st (short ton), immediately after the numeric value. For example, to specify weight in Pounds, enter 50000 1b in the text field. The symbol for the default unit for a field is displayed as part of the field label.</td>
</tr>
<tr>
<td>Commodity Desc.</td>
<td>Enter a short description of the commodity. By default, SPARCS N4 displays the description of the commodity selected in the Commodity field but you can edit the description.</td>
</tr>
<tr>
<td>Temp Required (C)</td>
<td>Enter the temperature required for the selected commodity. You have to specify a temperature only if the selected container is a reefer container.</td>
</tr>
</tbody>
</table>
### Booking Items form: Optional Fields

**page 3 of 3**

<table>
<thead>
<tr>
<th>Field Label</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ventilation Required</td>
<td>Enter the ventilation required for the containers associated with the booking item.</td>
</tr>
<tr>
<td></td>
<td>Use the <strong>Ventilation Unit</strong> field to select a unit for the value specified in this field.</td>
</tr>
<tr>
<td>Ventilation Unit</td>
<td>Select one of the following as the unit for the value specified in the <strong>Ventilation Required</strong> field:</td>
</tr>
<tr>
<td></td>
<td>• Percentage</td>
</tr>
<tr>
<td></td>
<td>• Cubic Feet/Minute</td>
</tr>
<tr>
<td></td>
<td>• Cubic Meters/Hour</td>
</tr>
<tr>
<td>CO2 required, %</td>
<td>Enter the percentage of carbon dioxide required.</td>
</tr>
<tr>
<td>O2 required, %</td>
<td>Enter the percentage of oxygen required.</td>
</tr>
<tr>
<td>Humidity required, %</td>
<td>Enter the percentage of humidity required.</td>
</tr>
<tr>
<td>Hazards</td>
<td>Click <strong>Add Hazards</strong> to specify hazards, if the booking item is for hazardous cargo. Refer to N4 Hazards Training Document for detail instructions.</td>
</tr>
<tr>
<td>Overlong Back (cm)</td>
<td>Enter the dimensions by which the equipment is out-of-gauge at the back.</td>
</tr>
<tr>
<td>Overlong Front (cm)</td>
<td>Enter the dimensions by which the equipment is out-of-gauge in the front.</td>
</tr>
<tr>
<td>Overwide Left (cm)</td>
<td>Enter the dimensions by which the equipment is out-of-gauge on the left side.</td>
</tr>
<tr>
<td>Overwide Right (cm)</td>
<td>Enter the dimensions by which the equipment is out-of-gauge on the right side.</td>
</tr>
<tr>
<td>Overheight (cm)</td>
<td>Enter the dimensions by which the equipment is out-of-gauge at the top.</td>
</tr>
<tr>
<td>Is OOG</td>
<td>Select the check box if the booking item is for out-of-gauge equipment.</td>
</tr>
<tr>
<td></td>
<td>If you enter any OOG details for the booking item, SPARCS N4 automatically selects this check box after you save the booking item.</td>
</tr>
<tr>
<td></td>
<td>However, if you remove all the OOG details for an booking item, SPARCS N4 does not automatically clear the <strong>Is OOG</strong> check box. If you do not want to use the booking item for OOG equipment, you must clear the <strong>Is OOG</strong> check box.</td>
</tr>
<tr>
<td>Remarks</td>
<td>Enter any remarks for the booking item.</td>
</tr>
</tbody>
</table>
The **Serial Ranges** tab displays the equipment serial ranges specified for the selected Booking. If you associate equipment serial ranges with a Booking, VIT uses the equipment range to select the container to deliver against the Booking.

The equipment serial ranges defined for an Booking override the **Port Restriction Serial Ranges** which allow or restrict a specific range of containers to go to a specific port of discharge. If you want to modify the **Port Restrictions Serial Ranges** contact VIT at CustomerService@vit.org

The port restrictions will:
- Reject full export or domestic containers at the ingate.
- Reject requested or selected empty containers for a booking / Booking at the ingate.
- Reject an empty container for a booking/ Booking at the outgate.
The **Reserved Equipment** tab displays the equipment (containers) reserved or delivered for the selected Booking. The Line Operator reserves specific equipment against a Booking and VIT will deliver the specified equipment against thatBooking.

When delivering a container, SPARCS N4 either delivers a container that matches the order item criteria or a container that is listed in the **Reserved Equipment** tab. If a container from the **Reserved Equipment** tab is selected, SPARCS N4 does not try to match the container against the criteria specified in the order item.

On the **Reserved Equipment** tab, you can reserve equipment against the selected Booking and cancel reservations.

**To add reserved equipment:**

1. Click ➕.

**To cancel the reservation for an equipment:**

1. Select the equipment on the **Reserved Equipment** tab.

2. Click ⬅️.

For more information, see [Cancel Equipment Reservation](#) or [Cancel using Unit list view](#).

If an equipment is reserved against an order as part of a gate transaction and if you later cancel the gate transaction, SPARCS N4 removes the equipment from the **Reserved Equipment** tab. However, if the equipment was reserved against the order independent of the gate transaction, SPARCS N4 does not remove the equipment from the **Reserved Equipment** tab even after you cancel the gate transaction.

**For Bookings**

All units with the category **Export** or **Transship**, except for the units with the **Return to Shipper dray status**, are considered **assigned to the booking**. All the other units are considered **reserved against the booking**. Assigned containers are the containers that are **pre-advised** or received against a booking in order to leave on a vessel. Reserved containers are the containers associated with a booking to be delivered through the gate.
1. Open Booking view
2. Click Add or Edit Button
3. Opens Booking form
4. Click Booking Items
5. Opens Booking Items form
6. Click Reserve Equipment tab
7. Click Add or Edit Button
The Reserve Equipment form enables you to reserve equipment, such as empty containers, for the selected booking item. The Equipment Type area displays the length, ISO group, and height information from the selected order item.

SPARCS N4 implements the following rules when reserving equipment against an order item:

- The specified equipment must be in the yard or on an inbound vessel.
- You must not have reserved the equipment for a different order.
- The equipment tally for the selected booking item or order item must not exceed the specified limit.
- The sum of the Tally Out and Reserved quantities for the selected booking item or order item must be less than the maximum allowed.
- The container must be empty and of the same type as specified in the selected order item.
- The unit must not already have a specific vessel or train as an outbound carrier.
- No holds/permissions prevent you from reserving the container.
- The equipment operator must match the line operator specified in the order.
1. **Save** you must save the Add Booking Items form prior to reserving equipment
2. **Click** Reserve Equipment tab
3. **Click** Add Button
4. **Enter** Equipment Identity number
5. **Save**
Open Edit Booking form
Highlight line item in Booking Items form
Click Edit Button
1. Click Reserve Equipment tab
2. Highlight line item in Order Items form
3. Click Add or Delete Button
   If Add follow Add process steps
4. If Delete Opens Cancel Reservation form enter Yes or No
5. Click Refresh Button to verify
6. Click Close
Reserve Multiple Equipment numbers using Units list view

Operations ➔ Unit ➔ Filter to get the desired Size Height and ISO Group

Open Unit list view
1. Highlight desired equipment numbers
2. Right Click or use Actions Button
3. Click Transactions
4. Click Reserve Equipment
5. Opens Reserve Equipment form
6. Enter Order Number (Booking)
7. Optional Enter Carrier O/B Intended
8. Click Save
Cancel Multiple Equipment Reservations using Units list view

Operations ➔ Unit ➔ Filter to get the desired Size Height and ISO Group

Open Unit list view
1. Highlight desired equipment numbers
2. Right Click or use Actions Button
3. Click Transactions
4. Click Cancel Equipment Reservation
5. Bottom of screen shows Operation Successful
Booking Items form: Pre-Advised Tab

The **Pre-advised** tab displays the units that you have pre-advised or received against the selected booking. On the **Pre-advised** tab, you can cancel a pre-advised unit; however, you cannot pre-advice a unit against the selected booking. To pre-advice a container, use the **Pre-advice Export Container form**. Refer to N4 Pre-advised Training Documents for details.

**To cancel a pre-advised unit:**

1. **Open Booking view**
2. **Click Add or Edit Button**  3. **Opens Booking form**
4. **Click Booking Items**  5. **Opens Booking Items form**
6. **Click Pre-Advised tab**  7. **View or Click Delete Button**

---

**To cancel a pre-advised unit:**

1. **Open Booking view**
2. **Click Add or Edit Button**  3. **Opens Booking form**
4. **Click Booking Items**  5. **Opens Booking Items form**
6. **Click Pre-Advised tab**  7. **View or Click Delete Button**
Assign Booking form using Unit list view
page 1 of 2

Assign Booking form
Operations ➔ Unit ➔ Units ➔ Units view ➔ Actions ➔ Transactions ➔ Assign Booking ➔ Assign Booking form

The Assign Booking form enables you to assign a Booking order to export or transship unit(s) and to roll a booking. If you select multiple units in the Units view, all the selected units must have the same line operator.

To assign an order to the selected unit(s):
1. Select unit or units from the units list view. Refer to N4 Unit Training Document
2. Open Assign Booking from the menu. Refer to N4 Unit Training Document
3. Select the booking order number you want to assign to the selected unit(s) from the Booking Nbr lookup field,
   The list displays booking orders with the same line operator as the selected unit(s).
4. Click Save.
1. **Opens** Update Unit with Booking Item Values form

2. **Click Yes** to update the unit with the following details from the booking item:
   - OOG details
   - Refer requirements
   - Hazards
   - Goods details including commodity, origin, designation, shipper, and consignee

   Otherwise, **click No**.

3. Note that the Booking Number is updated in the unit list view.
Assign Booking form

What the assign booking does and what it verifies

You can assign a booking order to the selected unit(s) if:

- The **Category** of the selected unit(s) is Domestic, Export, or Transship.
  
  If the **Category** of the selected unit is Transship, you can assign a booking to the unit only if the unit is still onboard the inbound carrier.

- The **Freight Kind** of the selected unit(s) matches the **Freight Kind** of the specified booking order.

- The specified booking order has an order item that matches the equipment size, ISO group, and height of the selected unit(s)

- The **Quantity** for the matching order item is not reached.

If the **Assign Booking** action fails for one of the selected units, it fails for all the selected units. If successful, SPARCS N4 displays the order number in the **status block** in the **Unit Inspector** for the selected units. In addition, you can display the **Booking Number** column in the **Units** view to view the order number associated with a unit.

When you use the **Assign Booking** form to assign a booking order, SPARCS N4 ensures that the:

- Selected units are not loaded or departed on a vessel

- New vessel visit is not in the **Departed** phase

- Current date is not past the vessel visit cutoff date for the **current** booking, *except if the vessel has already departed*

- Current date is not past the vessel visit cutoff date for the **specified** booking. VIT does not enforce vessel cutoff at the gate.

  Following fields of the selected unit(s) are updated using the corresponding values of the specified order:

  - Carrier Visit (Vessel/Train)
  - Port of Load (for export containers only)
  - Port of Discharge
  - Second Port of Discharge
  - Optional Pod1
  - Optional Pod2
  - Origin (for export containers only)
  - Destination
  - Shipper and Consignee
## Bookings Columns page 1 of 2

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Split Booking

• The **Define Split Booking** form enables you to split the booking and move selected units to either a new or an existing booking for the same line operator.
• Refer to N4 Booking Inspector Training Document for details on creating a split booking.

Roll a Booking

• When updating the routing information of a booking if the changes are also propagated to the associated units, it is referred to as rolling.
• Refer to N4 Booking Inspector Training Document for details on rolling a booking.
Booking: Inspector

- Booking Inspector displays the details of the selected Booking and enables you to perform various actions on it.
- N4 Booking Inspector is a separate Training Document.
**Booking Instructions**

A. Brief Description:
1. Below are guidelines on how to do some task for the Booking Order.
2. Usually the simple way is best

B. Guidelines:
1. Container selection criteria should be limited to what is absolutely necessary.
   a. The more criteria (CSC date, material, etc.) the harder it is to find a match.
   b. Do not specific container (reserve) by number unless it is absolutely required.
2. How to control the quantity of containers delivered against the Booking?
   a. Using the Order Items form you can edit the quantity of containers by size, height and ISO Group
   b. Using the Tally Items field you can control the total quantity
3. How to control the quantity delivered per time period?
   a. Edit the quantity per B.2 above
4. If you have reserved containers, but want to limit the quantity delivered per time period?
   a. Reserving containers will only allow delivery of the reserved containers against the Booking, if you select option “Dispatch Reserved equipment ONLY” in the Dispatch Reserved field.
   b. Edit the quantity per B.2 above to limit per time period
   c. If specific reserved containers must be delivered first
      i. Then place other reserved units on hold
      ii. Or create different Booking
5. How to only deliver grade “A” containers against a Booking?
   a. Verify containers are graded correctly
   b. If not, request your M&R vendor to change the grade
   c. Update the Order Items form with the correct grade
6. How to control the earliest and latest date equipment can be delivered?
   a. Enter the dates in the Booking form
   b. Or edit the quantity per B.2 above
7. How is the empty yards (NCY and PCY) and APM dispatches update in the Booking?
   a. The Booking is only for facilities on N4.
   b. Containers dispatched from other facilities will require shipline control.
      i. Edit the quantity per B.2 above
   c. When a facility converts to N4, dispatches from that facility will be included in the tally
8. Can equipment on hold or damaged be reserved for a Booking?
   a. Yes much verification (not just holds) is only performed when the trucker arrives at the In Gate.
   b. This allows you to reserve the equipment so it does not get dispatched against another booking after the hold is released and before you can assign to an Booking.
9. What category of equipment can be reserved for a Booking?
   a. Booking will allow you to reserve equipment in any category.
   b. However, the trucker will not get a dispatch at the In Gate if the category is:
      i. Through
      ii. Transship
      iii. Domestic
      iv. Export
   c. The trucker will be dispatched if category is:
      i. Storage
      ii. Import
End of Training