Background

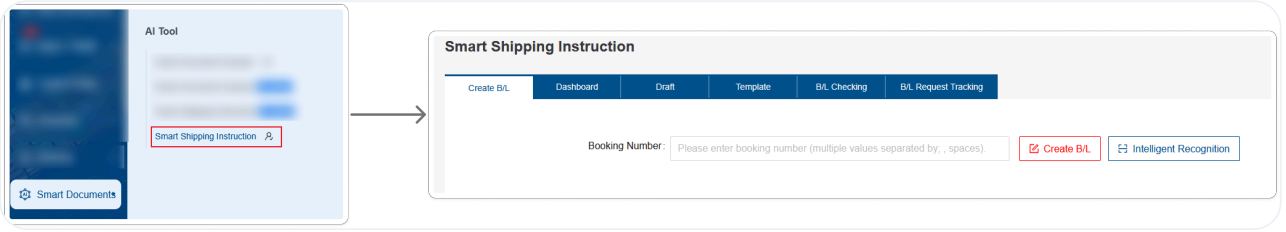
Smart Shipping Instruction is an application on the COSCO E-Business platform. Its purpose is to help customers create B/L Proformas through the intelligent self-service provided by the backend system.



App Home

Smart Shipping Instruction - Open Home

- Navigation path:
- User clicks the sidebar,
- clicks **Smart Document** to expand the secondary sidebar menu,
- selects **Smart Shipping Instruction** to jump to the landing page of Smart Shipping Instruction.



Smart Shipping Instruction - Home Modules

Home Modules

- Create B/L - Customer users enter the Smart Shipping Instruction home page; the system opens this Tab by default. Users can enter a Booking Number to start the B/L creation process.
- Dashboard - Customers can view the processing progress and summary results of intelligent recognition tasks here.
- Draft - Manage B/L creation drafts.

- Template - Manage B/L creation templates.
- B/L Checking - Users can enter Booking Number, B/L Number and Route Information, Vessel information, etc. to search for bills of lading.
- B/L Request Tracking - Users can enter B/L Request reference number, Booking Number, B/L Number and Route, Vessel information, etc. to search for B/L requests.

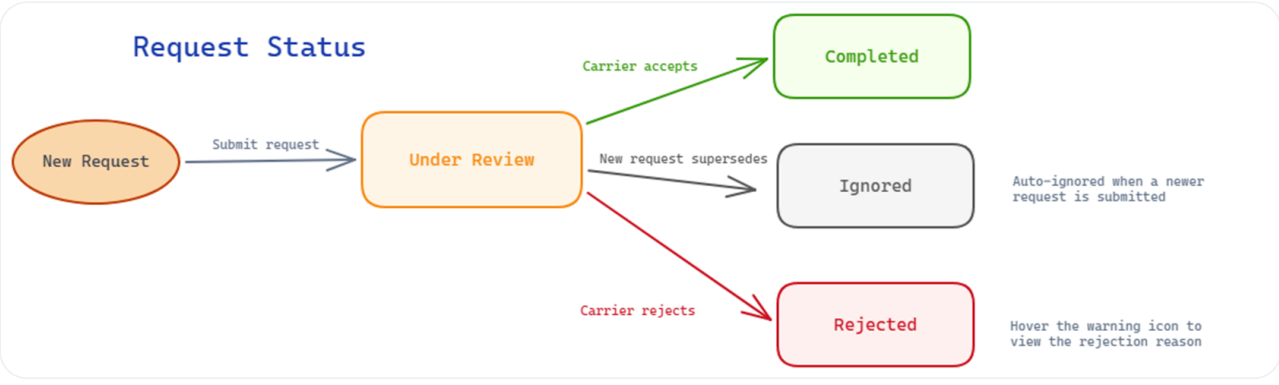
B/L Status

B/L statuses that customers can see in Smart SI

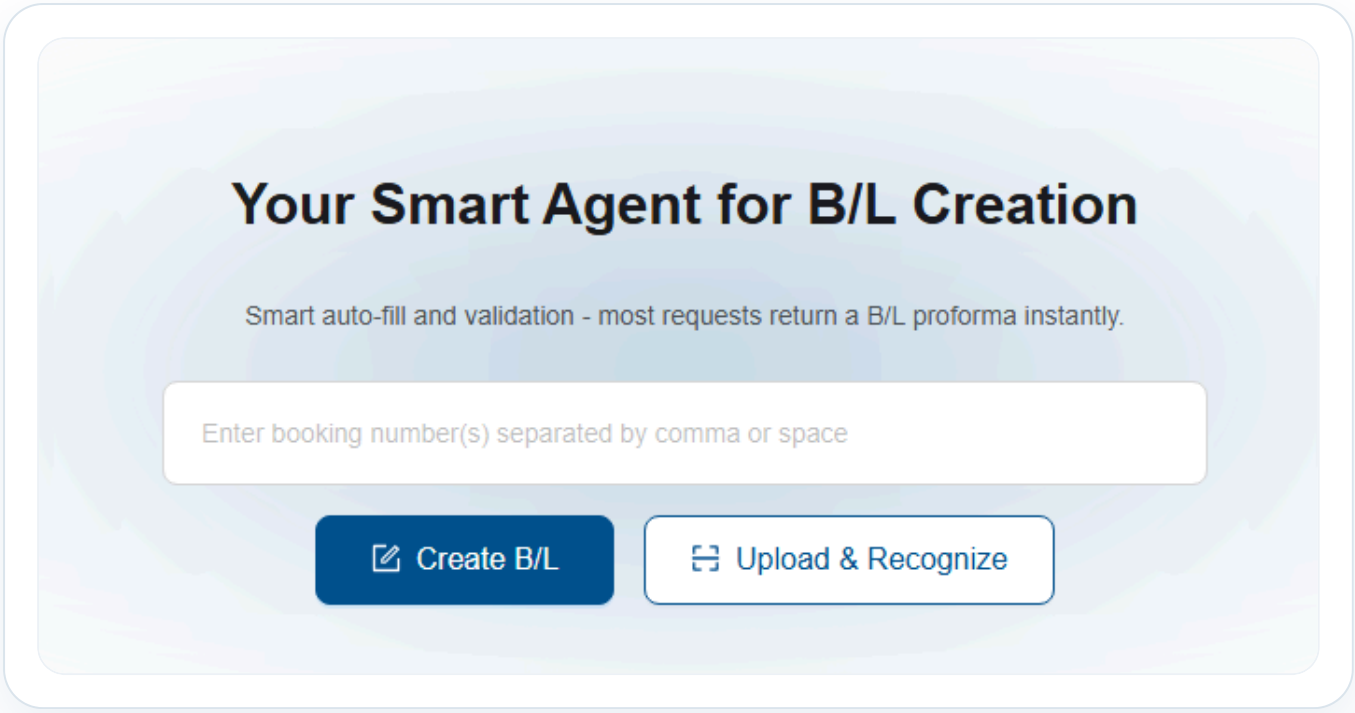


B/L Request Status

B/L request statuses that customers can see in Smart SI



Create B/L- Methods



After entering a booking number, you can create a Bill of Lading (B/L) using one of the following methods:

- **Create B/L**
  - Click **Create B/L** to create a B/L by completing the online form.
- **Upload & Extract**
  - Click **Upload & Extract** to upload source documents and use AI-powered data extraction to create a B/L.

Creating a B/L - Validation Checks

Booking Status Validation

- The booking status must be **Confirmed** or **Pending**.
- If the booking status does not meet the requirements, the system will display an error message and prevent B/L creation.

Booking Number Accessibility Validation

- The system validates the accessibility of the Booking Number entered by the user.
- The user has permission to create a B/L based on that Booking Number only when any of the following conditions is met:
  - The company associated with the user must be one of the Booking Party, Shipper, and Forwarder of the entered Booking Number.
  - The company represented by the user must be one of the Booking Party, Shipper, and Forwarder of the entered Booking Number.
  - The company associated with the user is the agent of the Booking Office of the entered Booking Number.
  - If none of the above permissions are met, the system will show an error reminder.

Your Smart Agent for B/L Creation

Smart auto-fill and validation - most requests return a B/L proforma instantly.

7261665940 (Invalid) ×

You are not the Booking Party, Forwarder, or Shipper for the following booking(s). Please check: 7261665940.

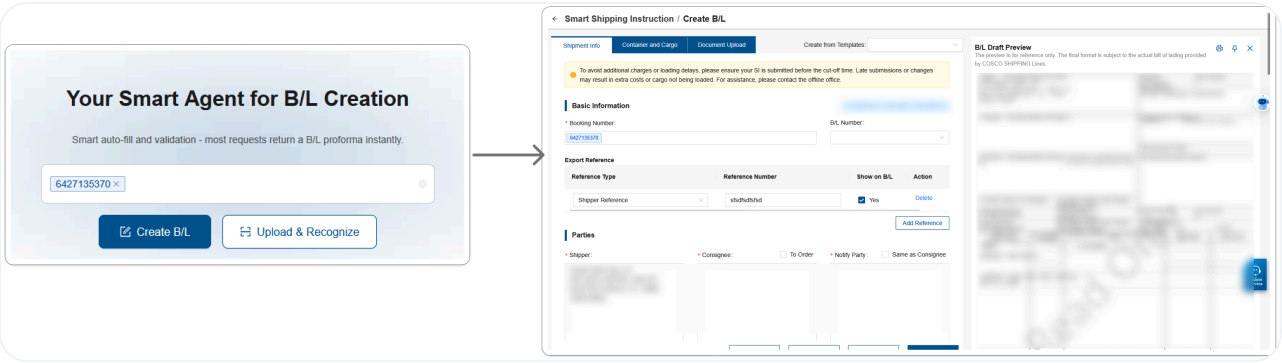
Create B/L

Upload & Recognize

Create B/L via Online Form

Create B/L - Open B/L Creation Page

After the user enters a Booking Number, the user clicks the **Create B/L** button. After the system validates the booking, it will jump to the B/L Creation Page.



Create B/L - Data Preload

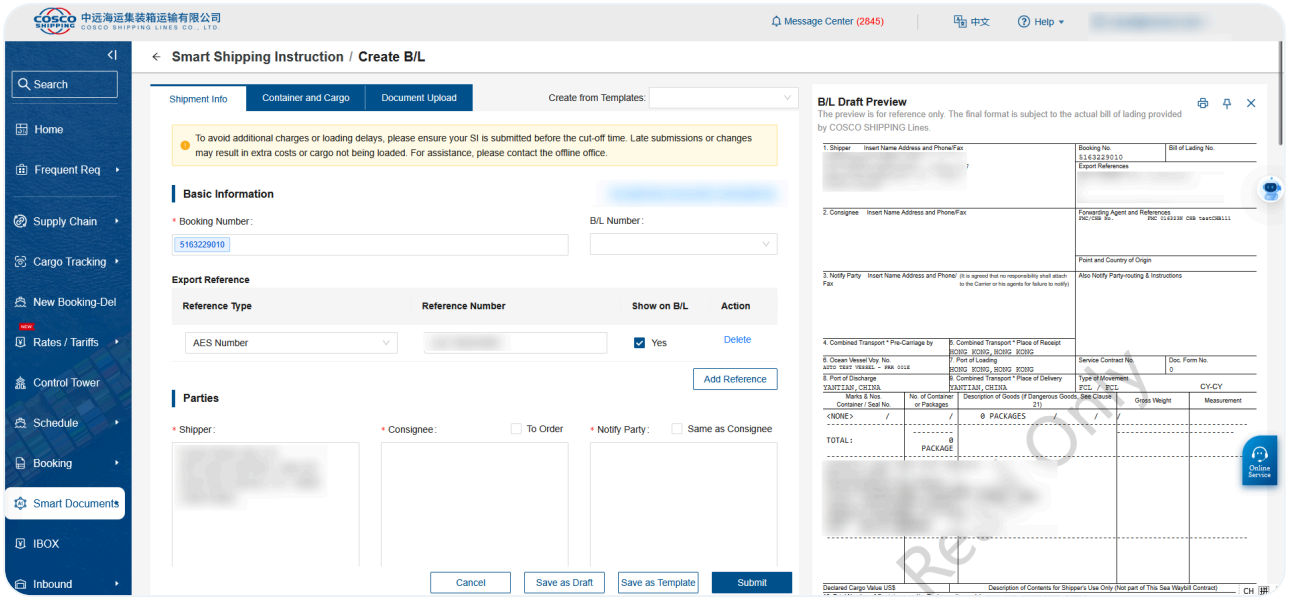
After the user opens the **Create B/L** Page, the system will preload certain data based on the entered Booking Number, including but not limited to the following:

- Export Reference
- Party
- Route

Create B/L - Page Overview

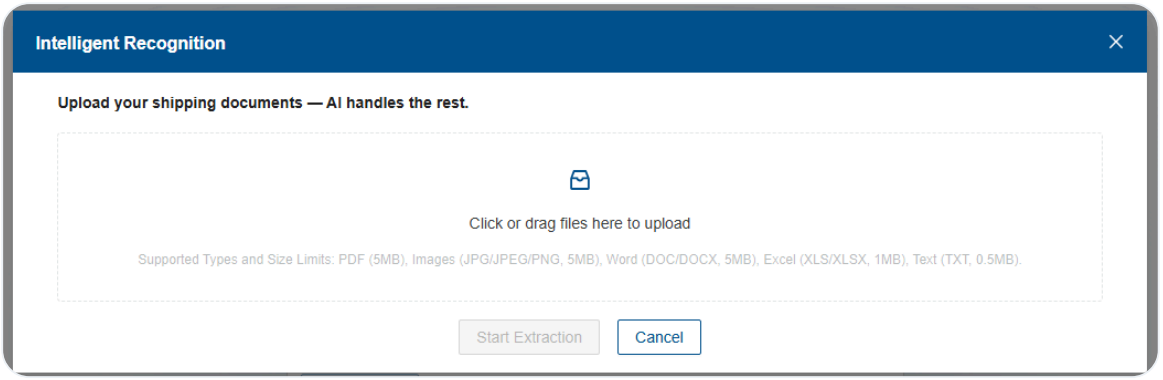
When the user opens the **Create B/L** Page, the system stays on the **Shipment Info** Tab by default.

The data filled in by the user in the form can be rendered in real time according to the B/L style. The user can refer to the **B/L Draft Preview** panel to view the real-time rendered data.


中远海运集装箱运输有限公司
COSCO SHIPPING LINES CO., LTD.
Message Center (2845)
中文
Help
Search
Home
Frequent Req
Supply Chain
Cargo Tracking
New Booking-Del
Rates / Tariffs
Control Tower
Schedule
Booking
Smart Documents
IBOX
Inbound
Smart Shipping Instruction / Create B/L
Shipment Info
Container and Cargo
Document Upload
Create from Templates:
To avoid additional charges or loading delays, please ensure your SI is submitted before the cut-off time. Late submissions or changes may result in extra costs or cargo not being loaded. For assistance, please contact the offline office.
Basic Information
* Booking Number:
5163229010
B/L Number:
Export Reference
Reference Type
Reference Number
Show on B/L
Action
AES Number
Yes
Delete
Add Reference
Parties
* Shipper:
* Consignee:
To Order
* Notify Party:
Same as Consignee
Cancel
Save as Draft
Save as Template
Submit
B/L Draft Preview
The preview is for reference only. The final format is subject to the actual bill of lading provided by COSCO SHIPPING Lines.
1. Shipper
Booking No.
5163229010
Bill of Lading No.
Export References
2. Consignee
Forwarding Agent and References
Point and Country of Origin
3. Notify Party
Also Notify Party-routing & Instructions
4. Combined Transport * Pre-Carriage by
5. Combined Transport * Place of Receipt
HONG KONG, HONG KONG
6. Ocean Vessel Voy. No.
7. Port of Loading
HONG KONG, HONG KONG
Service Contract No.
Doc. Form No.
0
8. Port of Discharge
YANTIAN, CHINA
9. Combined Transport * Place of Delivery
YANTIAN, CHINA
Type of Movement
FCL / FCL
CY-CY
Marks & Nos. Container / Seal No.
No. of Container or Packages
Description of Goods (If Dangerous Goods, See Clause 21)
Gross Weight
Measurement
<NONE>
0 PACKAGES
TOTAL:
0 PACKAGE
Declared Cargo Value US$
Description of Contents for Shipper's Use Only (Not part of This Sea Waybill Contract)
Online Service

Create B/L with Intelligent Document Scanner

Open the Upload Window

- Enter at least one booking number.
- Click **Upload & Extract**.
- After validation is completed successfully, the **Intelligent Recognition** window opens automatically.
- 

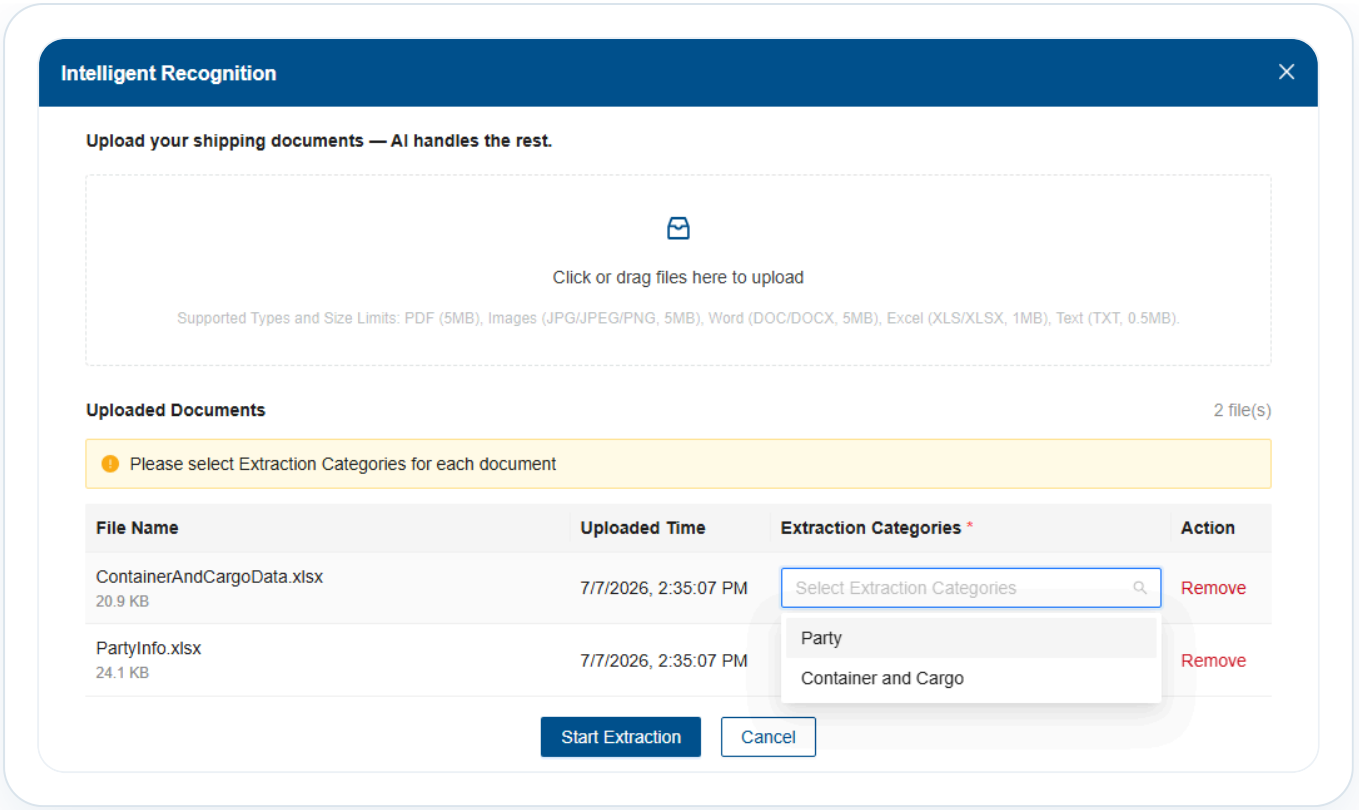
Upload Documents

- After uploading files, you must select an **Extraction Category** for each document to improve AI extraction accuracy.
- Typical source documents include:
  - Customs Declaration
    - Commercial Invoices
    - Packing Lists

- Contracts
- Other shipping-related documents

- Up to **10 documents** can be uploaded per extraction request.

- Supported file formats include:
  - Excel
  - Word
  - PDF
  - Images
  - TXT

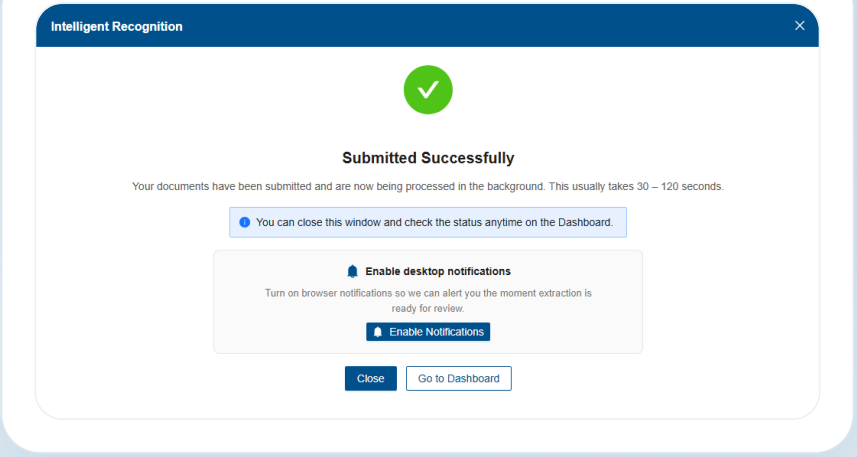


Start Extraction

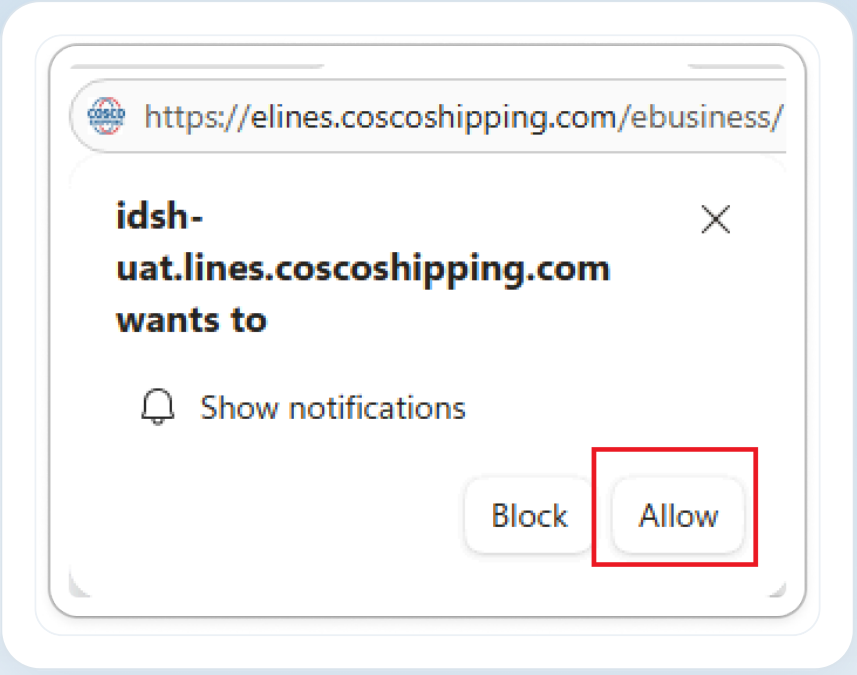
- Assign an extraction category to each uploaded file.
- Click **Start Extraction**.
- The system submits the request and performs AI extraction in the background.

Enable Desktop Notifications

- After the extraction request is successfully submitted:
  - A confirmation page appears, indicating that processing is in progress.
    - If desktop notifications are not enabled, the system prompts you to enable them.
    - Click **Enable Notifications**.



- Your browser will display a notification permission request.



- Click **Allow** to receive extraction status updates.

> Browser behavior may vary depending on the browser and version being used.

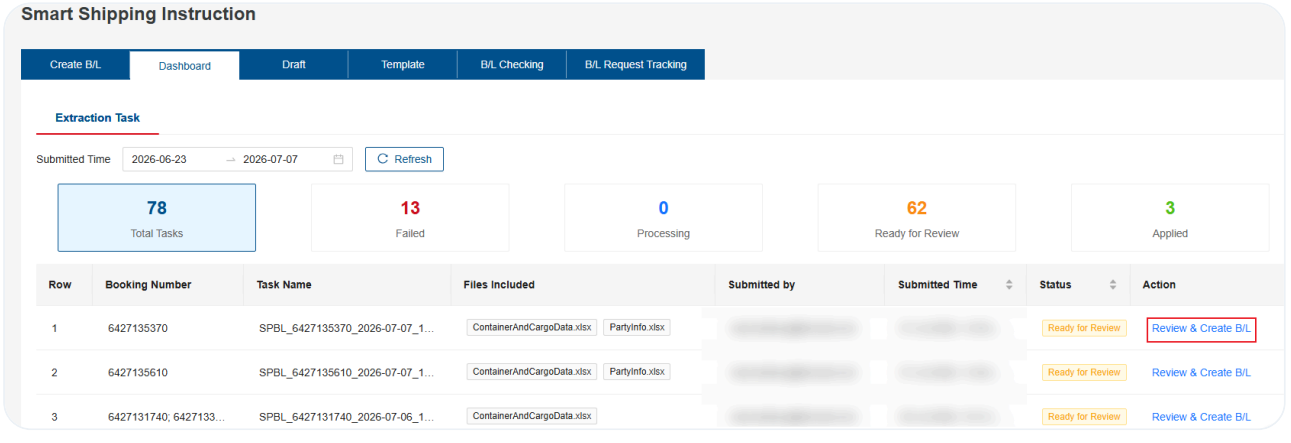
Receive Extraction Notifications

- When an extraction task is completed:
  - A desktop notification is sent to inform you that the extraction results are ready for review.
    - Click the notification or open the **Smart Shipping Instruction** page to review the extracted information.

Monitor Extraction Tasks

- You can track extraction progress and processing status from the Dashboard.

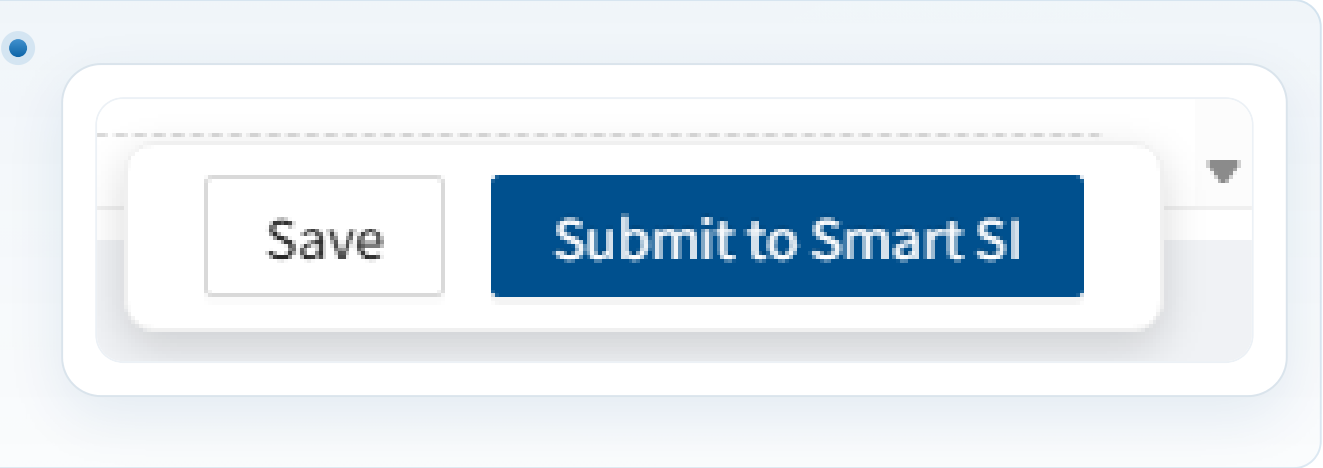
1. Open the **Dashboard** tab.
2. Select **Extraction Tasks**.
3. View extraction task status, volume for a selected period.
4. For tasks with the status **Pending Review**, click **Review & Create B/L**.
5. The system opens the manual review page in the **Smart Document Scanner** application.



Review Results and Create a B/L

After reviewing and correcting the extracted data:

1. Click **Submit to Smart SI**.



2. The system redirects you to the **Create B/L** page.

3. Extracted information is automatically populated into the B/L form.

4. Complete any remaining updates and continue the B/L creation process.

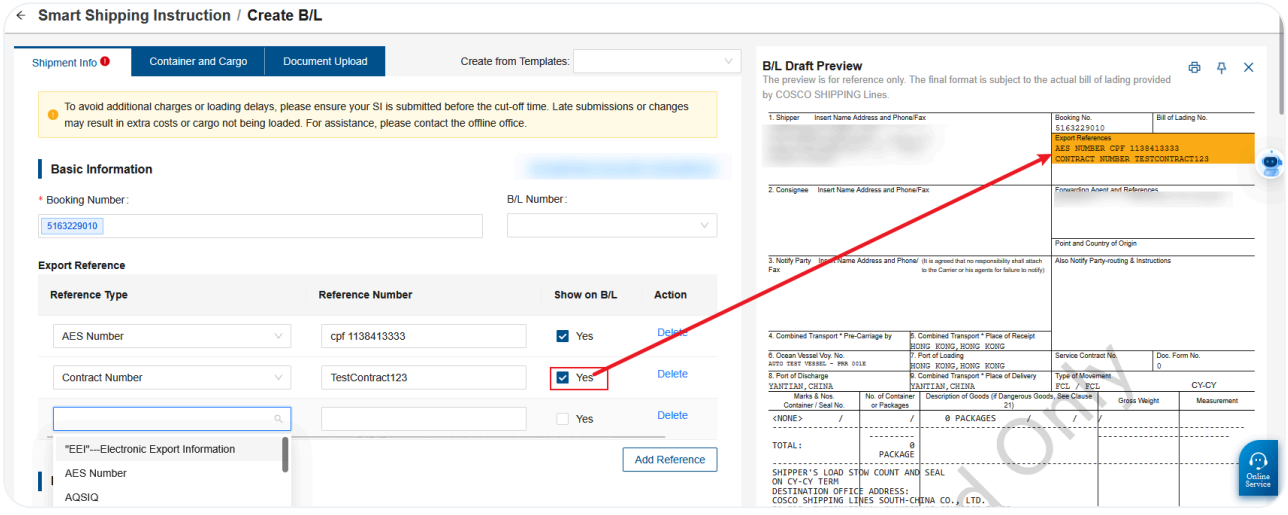
Mark an Extraction Task as Applied

- When a user opens the B/L Creation page from an extraction task and successfully submits the B/L request, the system automatically updates the extraction task status to **Applied**.

Create/Edit B/L - Export Reference Information

Export Reference Operations

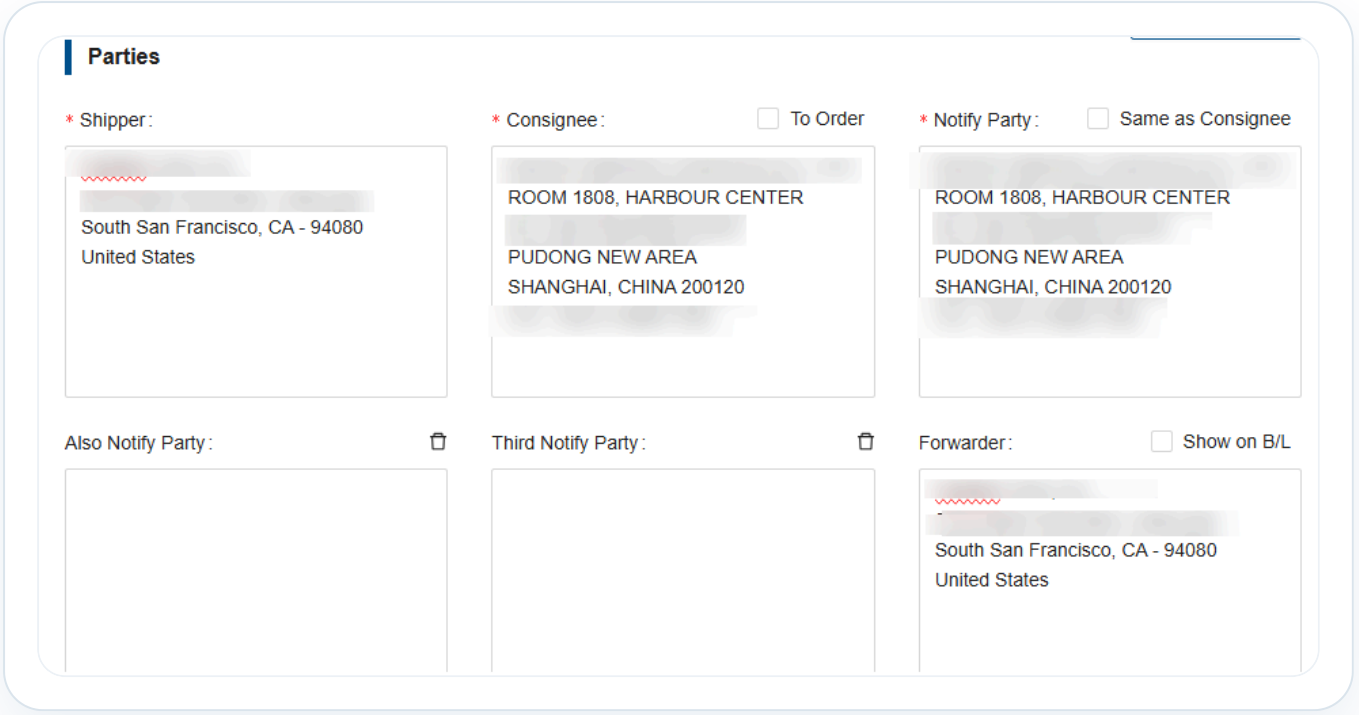
- The Export Reference data will be initialized based on the export reference data of the booking entered by the user.
- Certain Export References are read-only for the user; their values cannot be edited, but the check status of the Show on B/L checkbox can be modified. The checked references will be displayed in real time on the B/L Draft Preview panel.
- Certain Export References have the Show on B/L checkbox checked by default; the user can further modify its status.
- The user can also add new Export References, then check the Show on B/L checkbox.



Create/Edit B/L - Party

Party - Basic Functions

The B/L Creation Page will preload data based on the party information of the booking entered by the user.

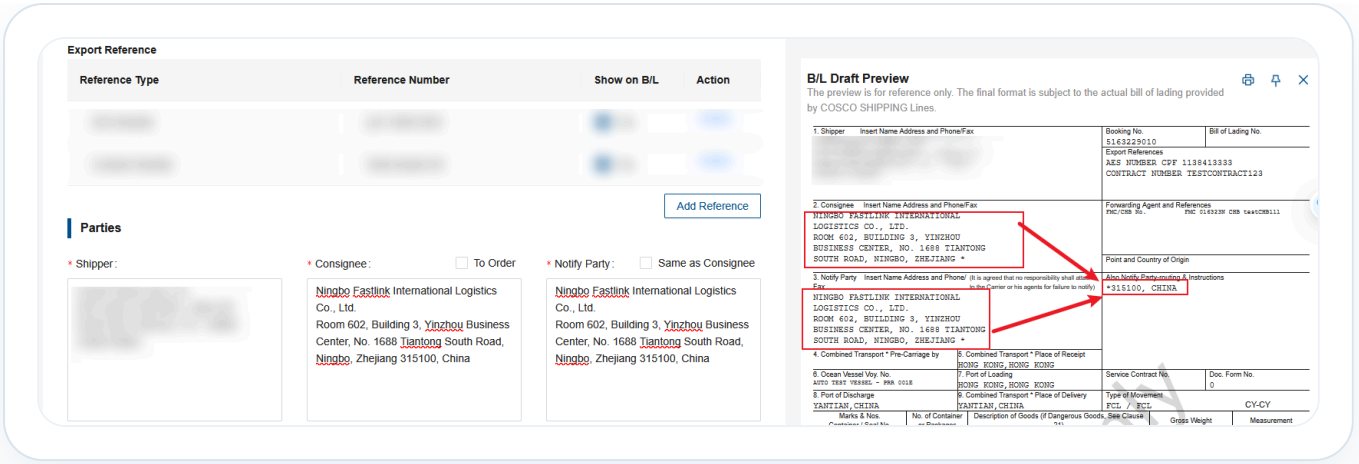


Users need to fill in the information of Shipper, Consignee, and Notify Party.

- 35 characters per line; characters beyond the fifth line (starting from the sixth line) will be automatically truncated by the system. By appending a continuation marker, the overflow is placed into the Second Notify Party input box. The user can view the truncation effect in real time through the B/L Draft Preview panel. (If the overflow text after truncation is the same for multiple parties, they share one overflow section.)

- If the text of the Second Notify Party still exceeds the length limit, the system will place the overflow into the B/L Remark. This content will not be displayed in the B/L Remark input box on the left form. The user can view the final display effect in the B/L Draft Preview panel.

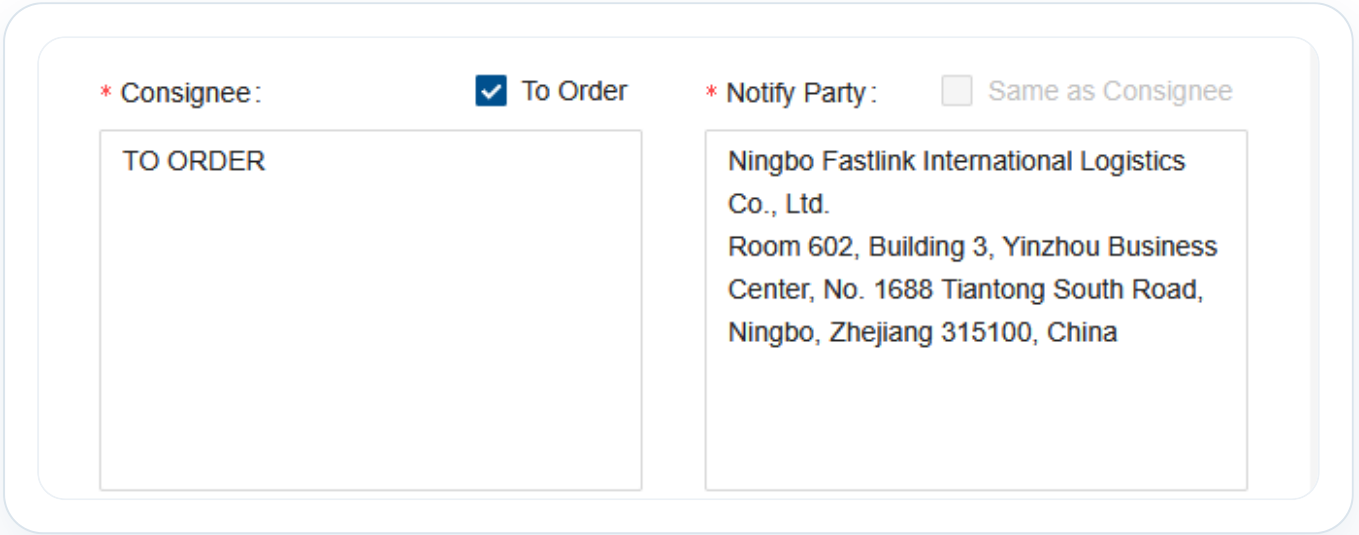
- Note: Do not manually truncate the party information text. Fill in the complete information text and let the system truncate it automatically.



Party - Consignee - To Order

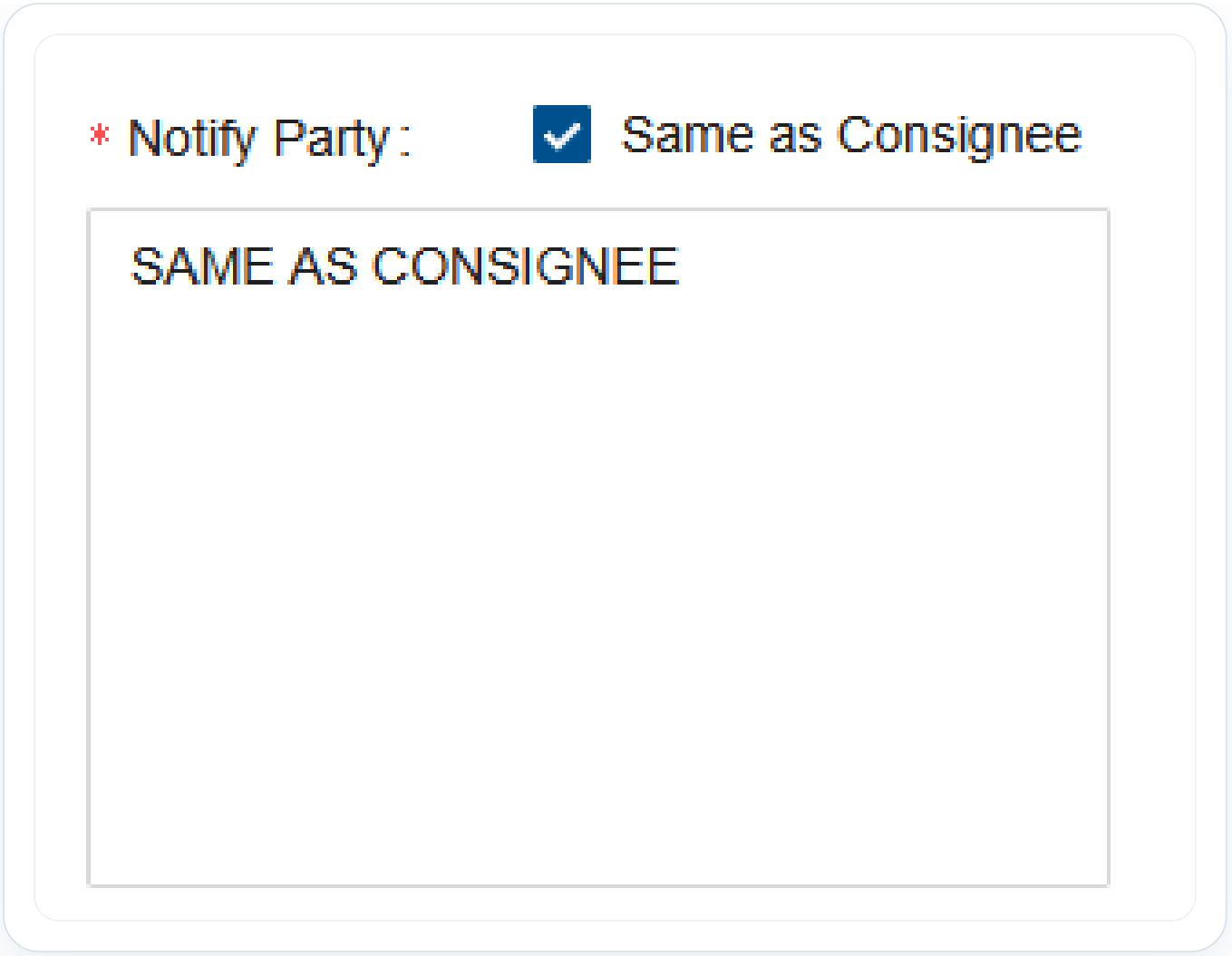
When the user checks the To Order checkbox above the Consignee input box, the system will automatically add the To Order keyword to the Consignee input box. After the user submits the creation request, the system also sends the To Order indicator to the documentation team.

When the user checks the To Order checkbox, the Same as Consignee checkbox of the Notify Party is no longer available.



Party - Notify Party - Same as Consignee

When the user checks the Same as Consignee checkbox above the Notify Party input box, the system will use the keyword SAME AS CONSIGNEE to replace the value of the input box.



Party - Notify Party - Add

Users can add multiple Notify Parties, up to a maximum of five Notify Parties.

* Shipper:

* Consignee: To Order

TO ORDER

* Notify Party: Same as Consignee

SAME AS CONSIGNEE

Also Notify Party:

Third Notify Party:

Fourth Notify Party:

Fifth Notify Party:

Forwarder: Show on B/L

Add Notify Party

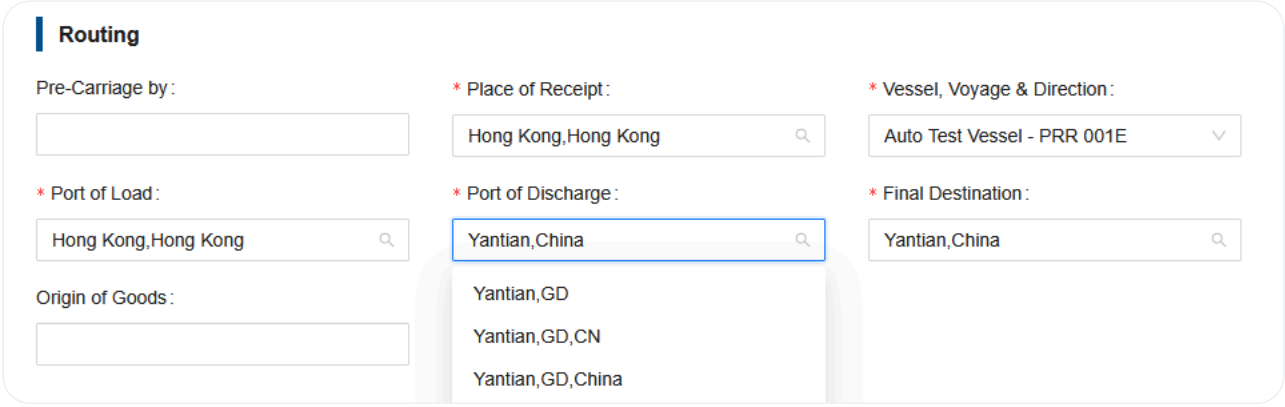
Create/Edit B/L - Route Information

Route Information - Data Entry

- The system will load the routing path information based on the entered Booking Number. The following fields: Place of Receipt; Vessel, Voyage and Direction; Port of Loading; Port of Discharge; Final Destination will be pre-filled with the default format.

- For multi-leg vessels, the **Vessel, Voyage and Direction** field defaults to the first-leg vessel in the booking route information. The user can specify the actual vessel name and voyage number among the multi-leg vessels as needed.

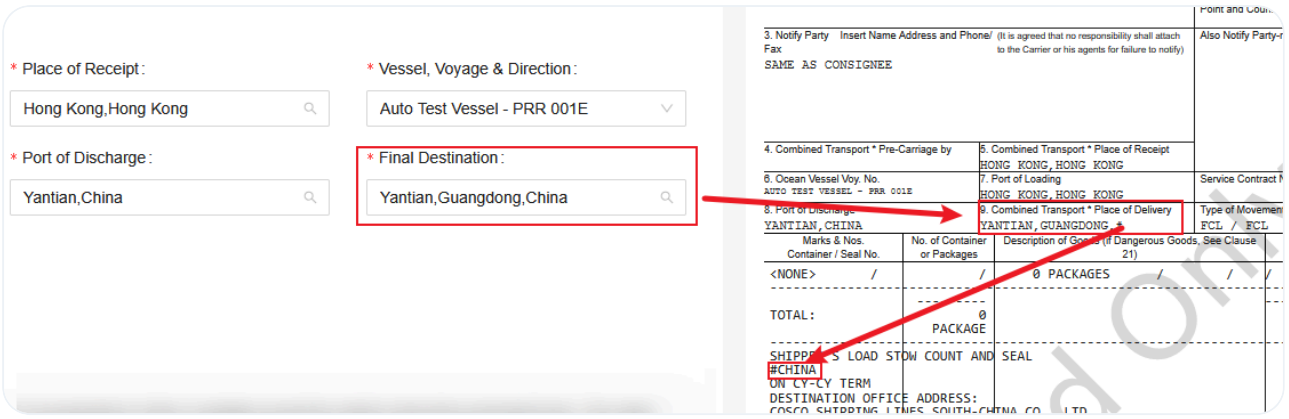
- When the user clicks the Port of Loading / Port of Discharge input box, or types the first few letters of the port name, the system will automatically display a port format list based on the input box content. The user can select from the format list to input. If the listed format list does not meet the requirements, the user can also manually enter the port information.



Route Information - Data Display

- If the display text of a route field exceeds the system limit, the system will automatically truncate it and display it in real time on the B/L Draft Preview panel.

- The maximum text length for Port of Loading, Port of Discharge, Place of Receipt, and Final Destination is 22 characters. For the overflow, the system will automatically append a connector and place it in the B/L Remark on the sample preview page.



Route Information - Smart Validation

- When the user manually enters (or modifies) text in the POL/POR/POD/FND input boxes on the B/L Creation Page, the system will check whether the location represented by the manually entered text is consistent with the location (POL/POR/POD/FND) of the corresponding booking in the system.

- If inconsistent, the system will directly display a warning message below the related field input box.

* Place of Receipt :

Nansha

The [POR] you entered may not match the booking details.

* Vessel, Voyage & Direction :

Auto Test Vessel - PRR 001E

* Port of Discharge :

Yantian,China

* Final Destination :

huizhou,

The [FND] you entered may not match the booking details.

Create/Edit B/L - B/L Handling Instructions

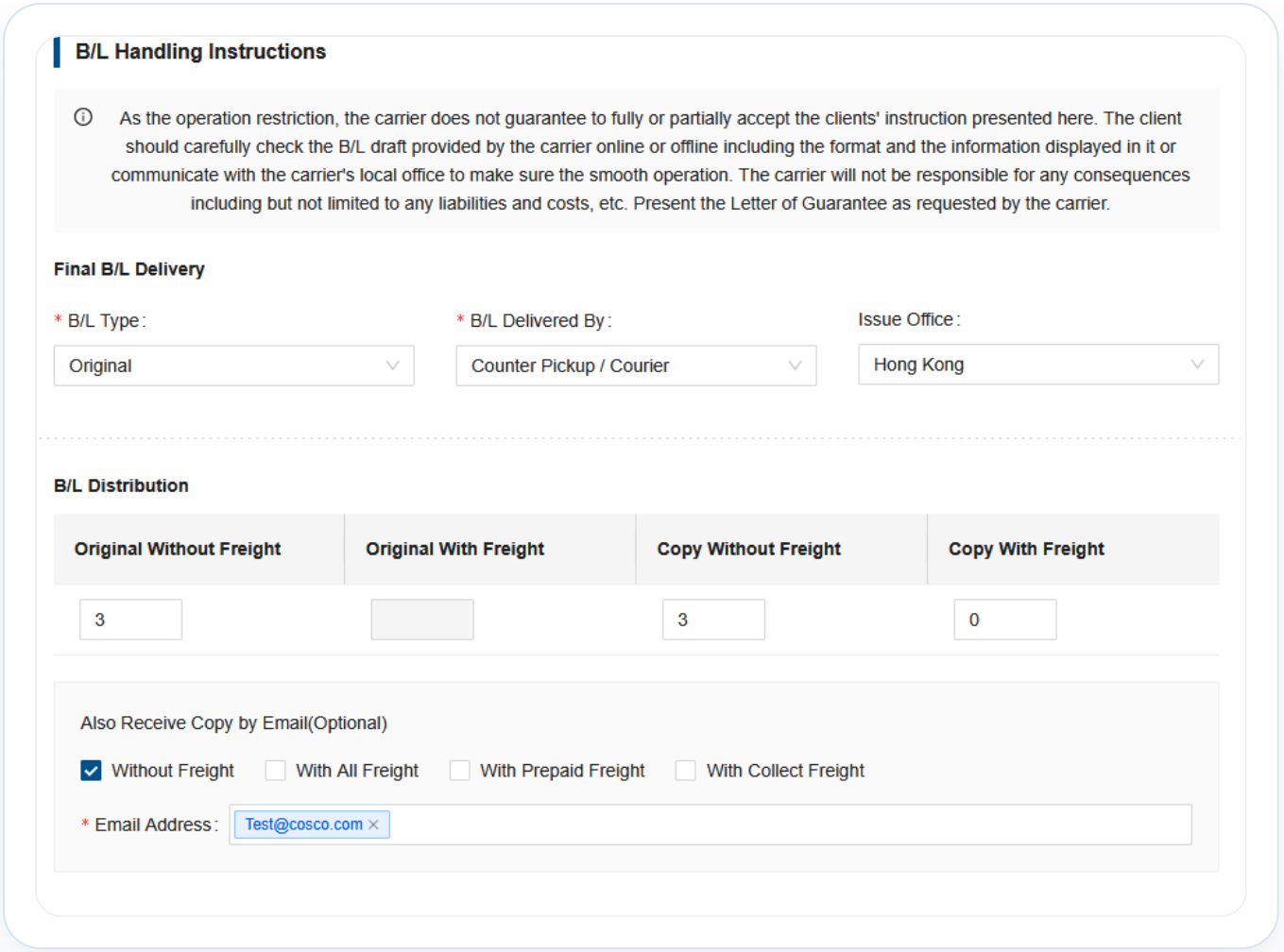
B/L Handling Instructions - Basic Operations

B/L Handling Instructions consist of the following parts:

- Final B/L Delivery
- B/L Distribution
- B/L Handling Options
- Payment Instructions

B/L Handling Instructions - Data Initialization

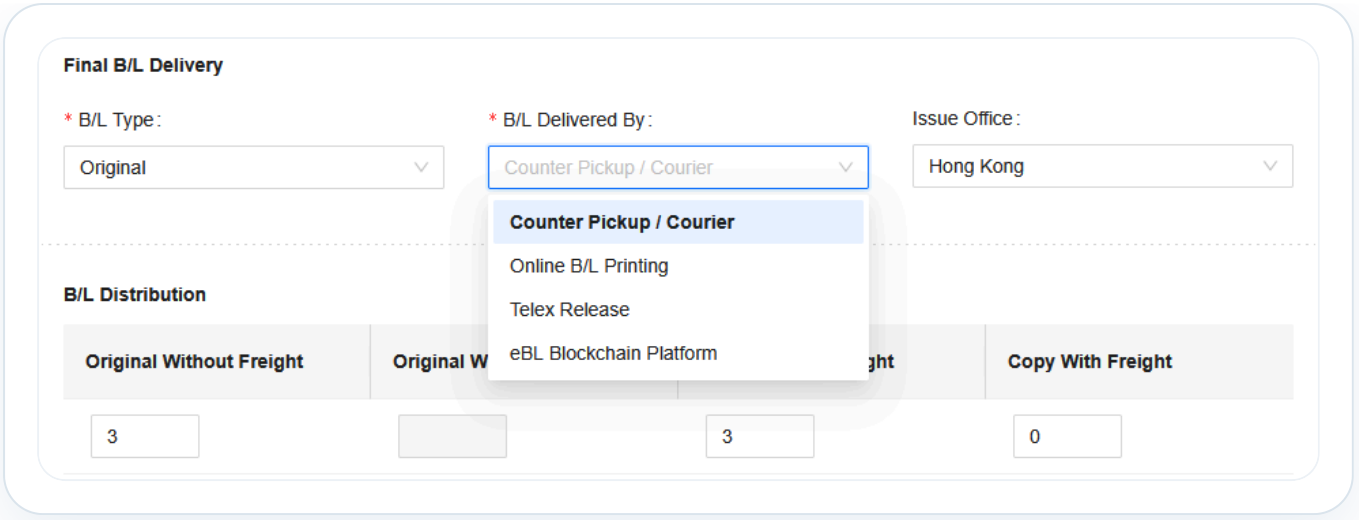
After the customer user enters a Booking Number and opens the B/L Creation Page, the system loads part of the B/L Handling Instructions data by default based **on the template selected by the customer and the customer's historical preferences**. The user can further modify it according to actual needs.



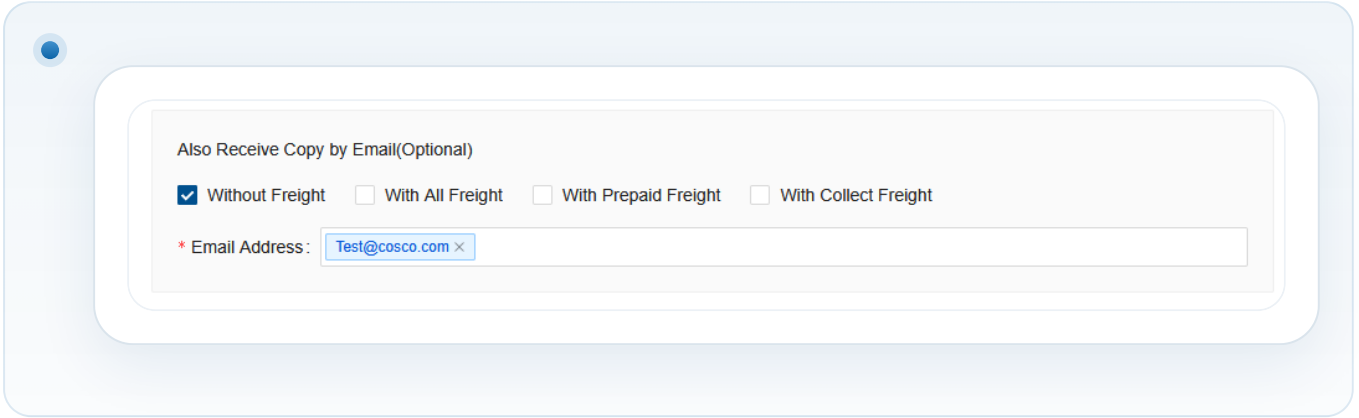
B/L Handling Instructions - B/L Delivery Instruction Entry

Users can select the B/L type: Original or Sea Waybill. Different B/L types have different delivery methods.

- Original type supports the following delivery methods: Counter Pickup / Courier; Online B/L Printing; Telex Release; eBL Blockchain Platform
- Sea Waybill type supports the following delivery methods: Counter Pickup / Courier; Online B/L Printing; Email



When the customer selects any of the following options Counter Pickup / Courier; Online B/L Printing; Telex Release; eBL Blockchain Platform, the system displays the Receive Copy by Email (Optional) form. If the customer needs to receive a copy at a specified email address, they can select the copy type, then enter the specified email address.



B/L Handling Instructions - B/L Handling Options

B/L Handling Options include the following parts

- Show Destination Agent in B/L, Show Cargo Weight By Container in B/L, Show Cargo Volume By Container in B/L checkboxes. The system will initialize them according to the customer's historical preferences. If a checkbox is checked, the B/L Draft Preview panel will display the related information in real time based on the data filled in by the user, and at the same time it is sent to the backend as a handling instruction.

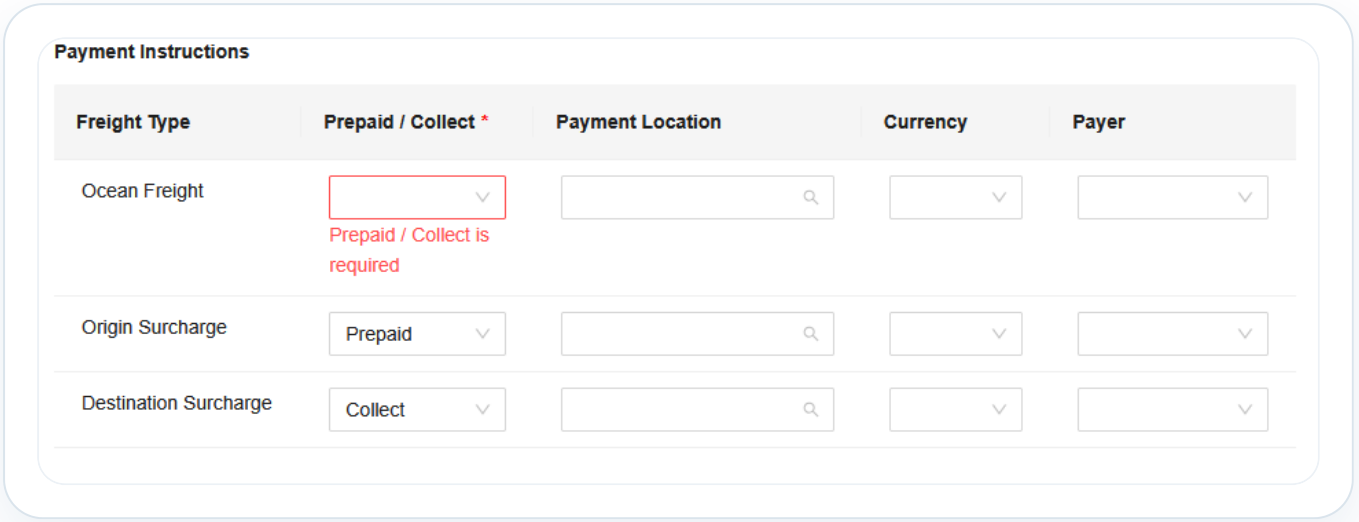
- B/L Remark (displayed on the B/L), where the user can fill in other information that needs to be displayed on the B/L.

- Other B/L handling instructions (not displayed on the B/L), used to tell the carrier about some special requirements of the B/L.



B/L Handling Instructions - Payment Instructions

Customers must select Prepaid or Collect for Ocean Freight in the form. Other data are optional.

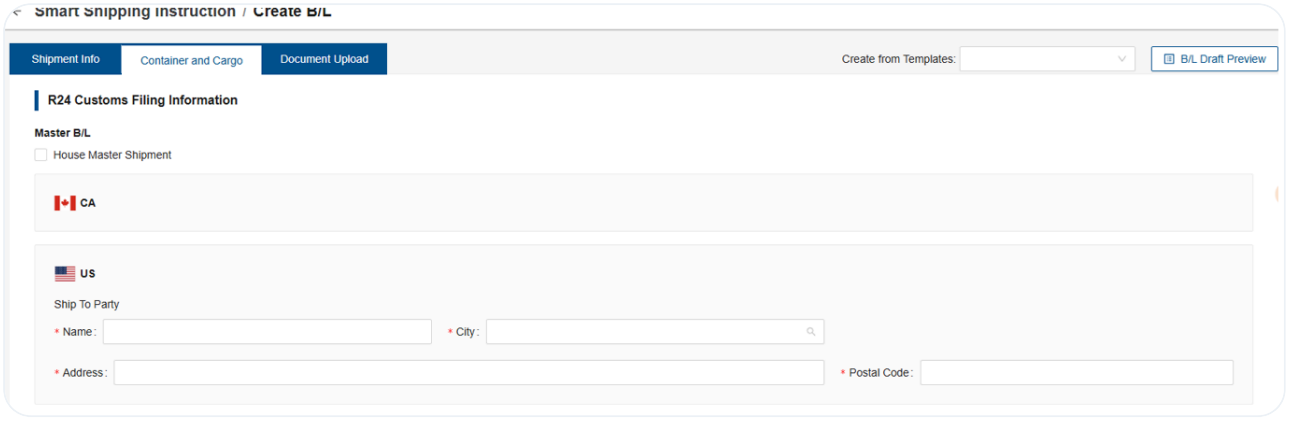


Create/Edit B/L - R24 Customs Filing Information

R24 Customs Filing Information - Introduction

- The system will determine whether the current B/L requires additional customs filing information based on the route information of the booking.

- Currently, when **any one of US, CA, EU, TUR, AE, JPN R24** is matched, the system will display the R24 Customs Filing Information form area. This area is located under the Container and Cargo Tab, and the specific customs filing interface will be displayed within the area.

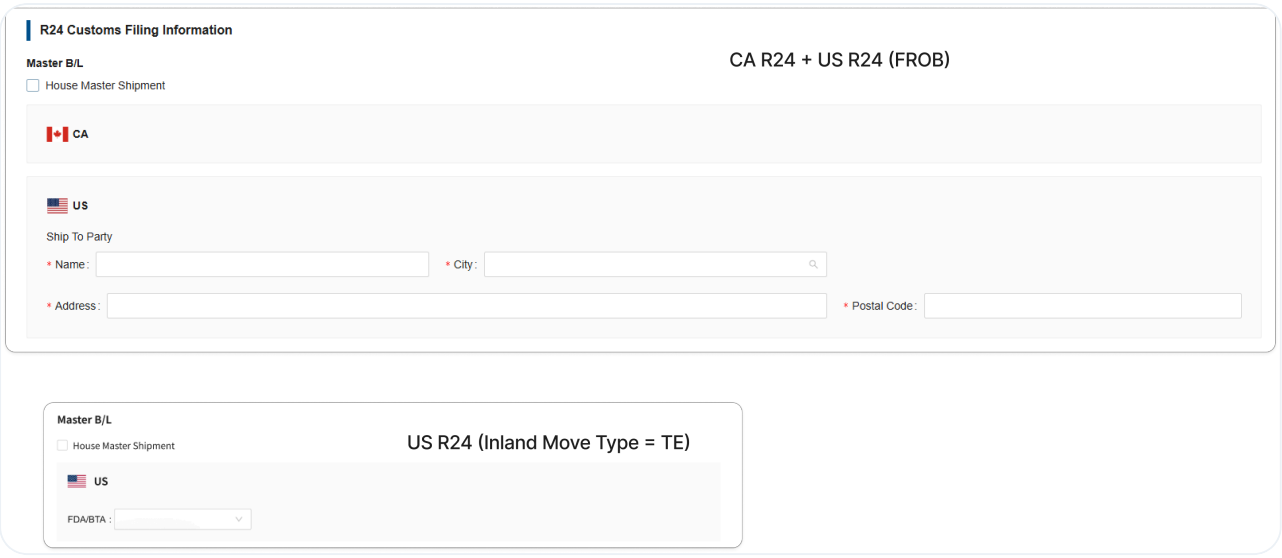


R24 Customs Filing Information - US R24, CA R24

When the US R24 or CA R24 filing item is matched, the system will display the following customs filing interface.

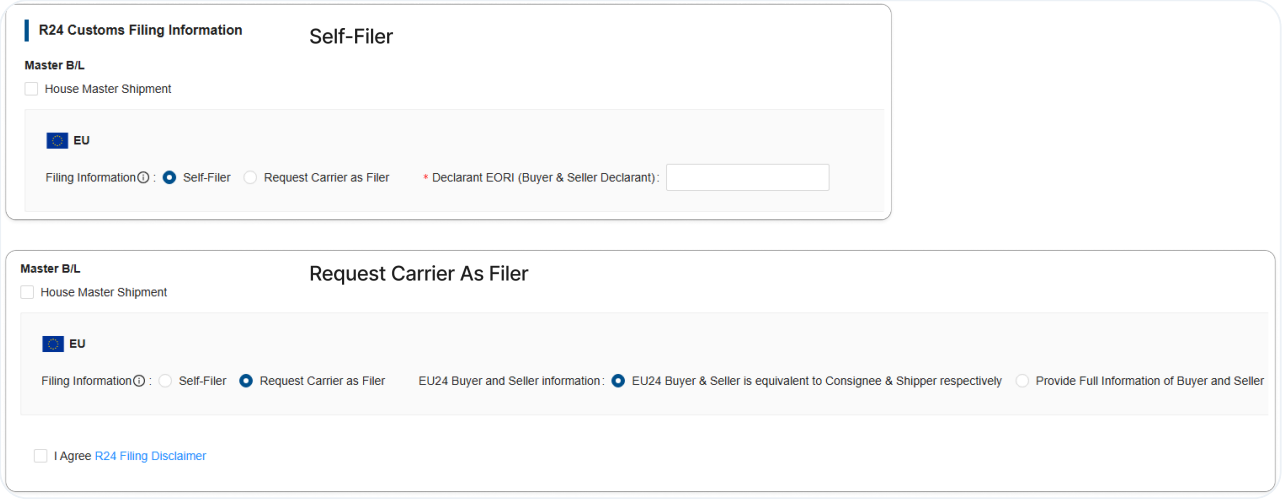
- The **Ship To Party** form area will be displayed depending on whether **US FROB(Foreign Cargo Remaining on Board)** is actually satisfied.

- The **FDA/BTA** flag checkbox will be displayed depending on whether **Inland Move Type = TE (Transportation & Exportation)** is actually satisfied.



R24 Customs Filing Information - EU R24 - Without House B/L

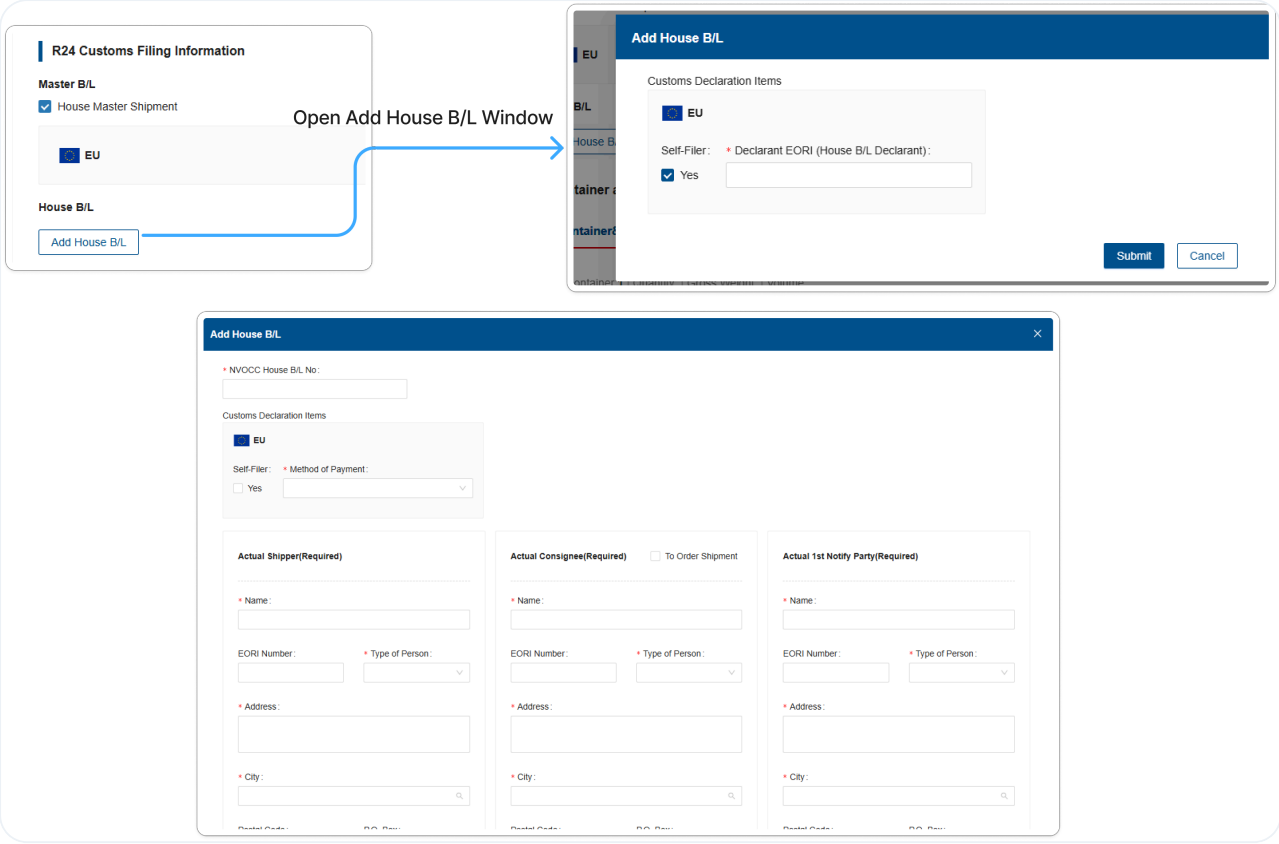
- When the EU R24 filing item is matched and the user has **not** checked **House Master Shipment**, the system will display the following customs filing interface.
  - The user can choose between Self-Filer or Request Carrier As Filer.
    - When requesting the carrier to file on their behalf, the relevant agreement must be read and accepted.
    - The user fills in the relevant data according to the form requirements.



R24 Customs Filing Information - EU R24 - With House B/L

When the EU R24 filing item is matched and the user checks House Master Shipment, the system will display the following customs filing interface.

- The user fills in the House B/L data according to the actual situation.



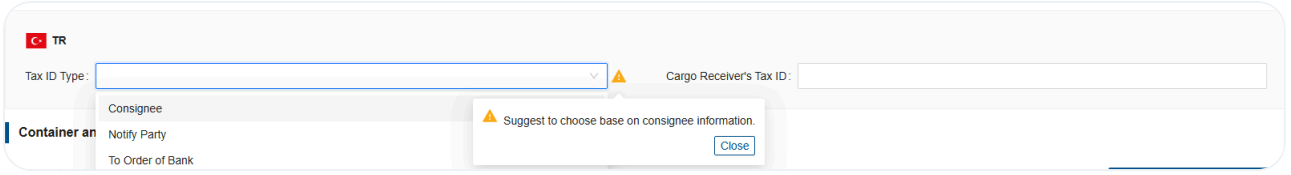
R24 Customs Filing Information - TUR R24

When the TUR R24 filing item is matched, the system will display the following customs filing interface.

- The user needs to specify the "Tax ID Type" and the Consignee's tax ID information.

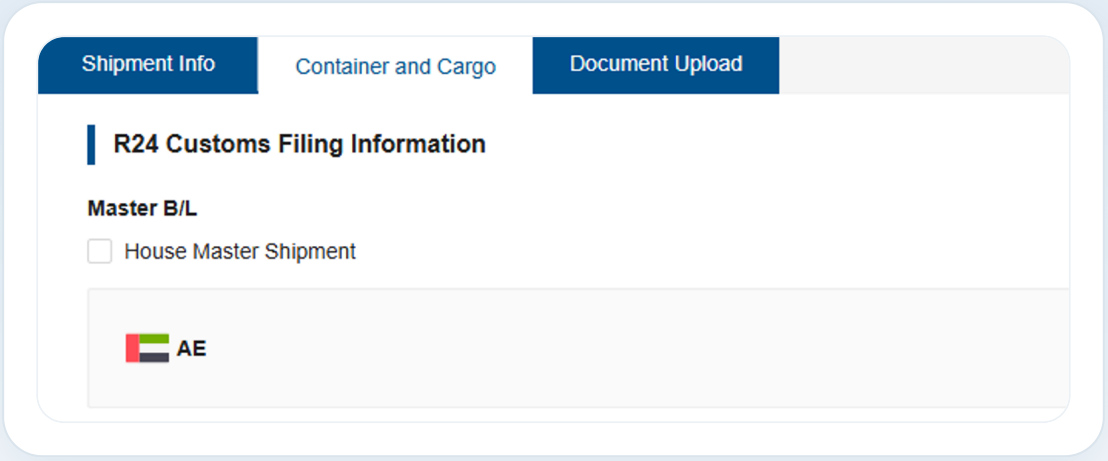
- The system will automatically determine the Tax ID Type based on the consignee information provided. If the selected Tax ID Type does not match the consignee

information, a warning message will be displayed: "Suggest to choose based on consignee information".

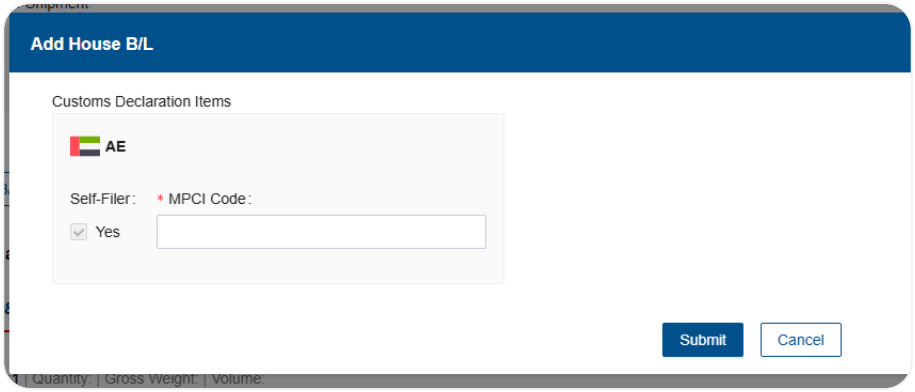


R24 Customs Filing Information - AE R24

When the AE R24 filing item is matched, the system will display the following customs filing interface.

- When there is no House B/L, there is no information to fill in.
  - 

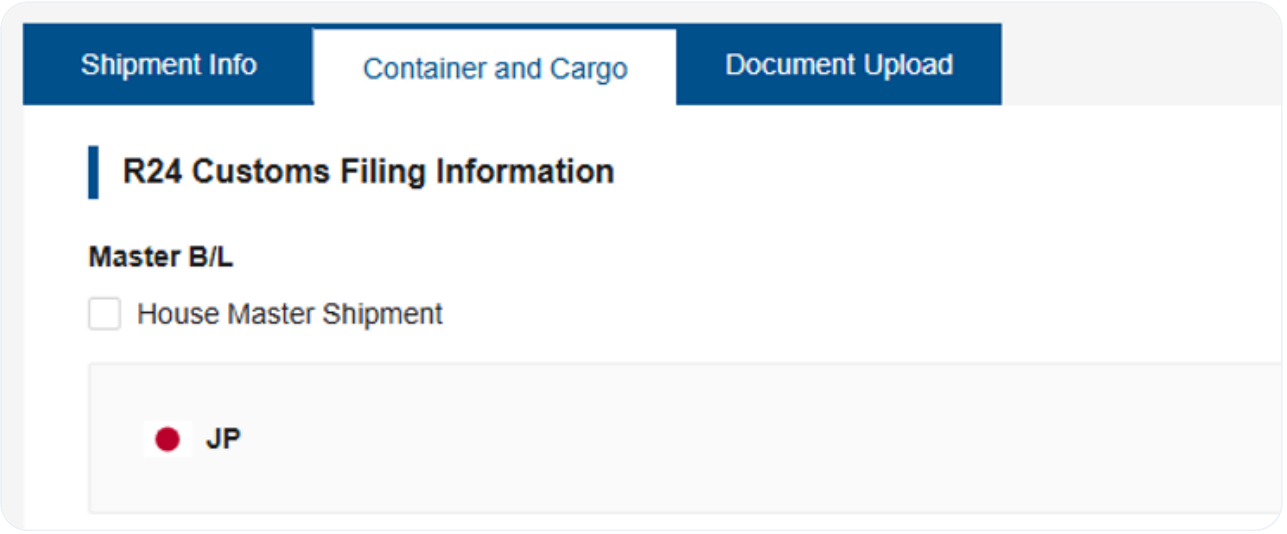
- When there is a House B/L, check **House Master Shipment**, then click Add House B/L to open the House B/L window.
  - The system will require the MPCI Code to be entered.
    - Only letters and numbers are allowed.



R24 Customs Filing Information - JPN R24

- When the JPN R24 filing item is matched, the system will display the following customs filing interface.

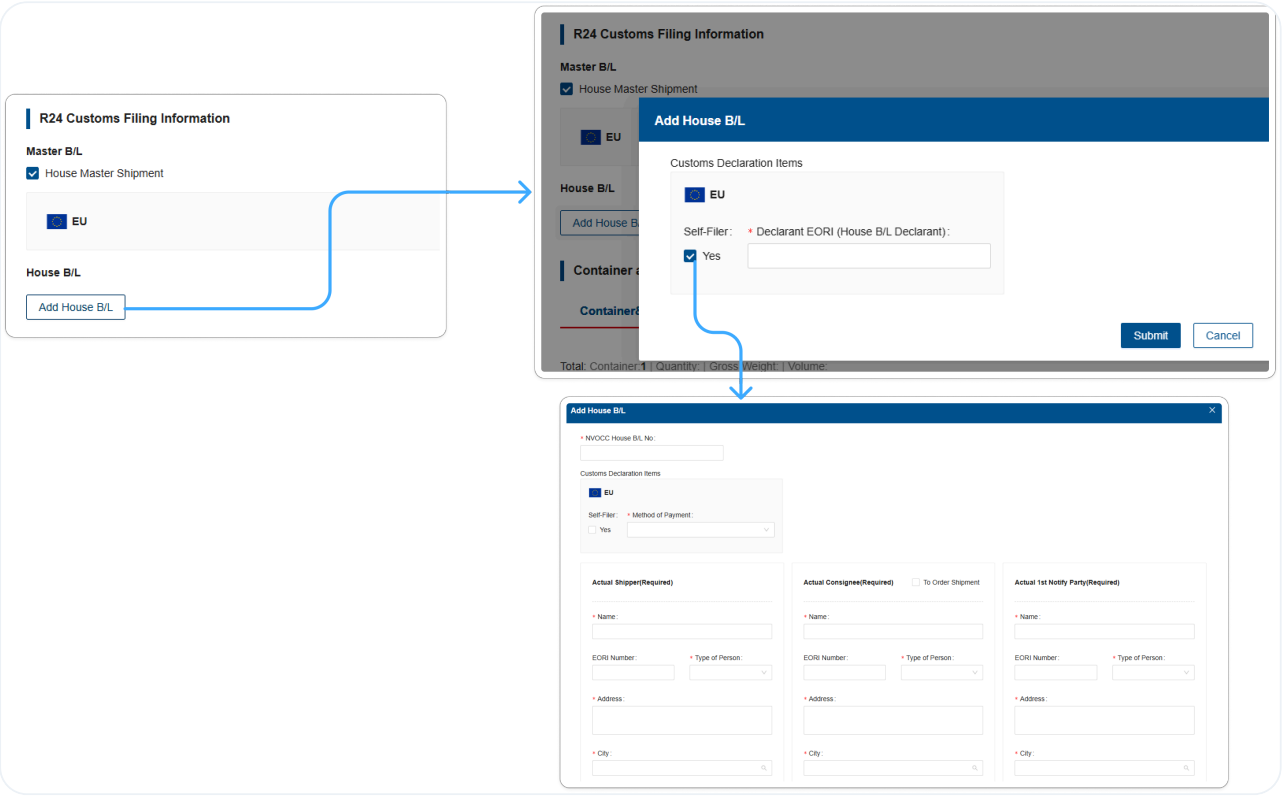
- The user only needs to check or ignore the **House Master Shipment** checkbox according to the actual situation. No other information can be filled in.



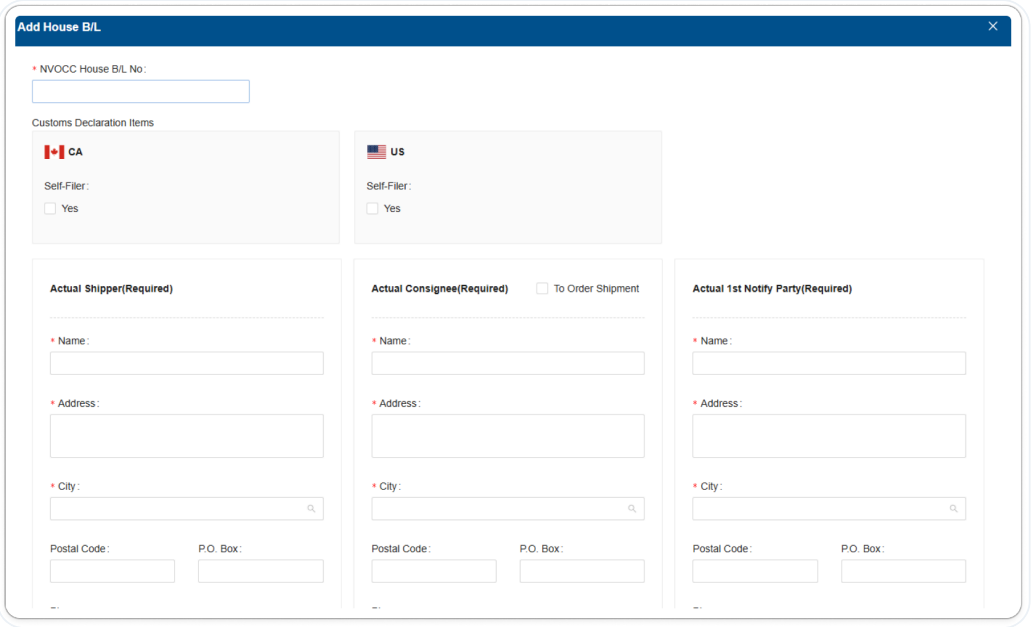
R24 Customs Filing Information - With House B/L - Data Entry

- When EU R24, US R24, or CA R24 is matched, if the user has checked House Master Shipment, the related House B/L data needs to be entered.

- For example, when EU R24 is matched and the customer does not select Self-Filer, the system will display the House B/L data form.
  - The user clicks Add House B/L, and the system will open the House B/L form window.
    - The system will check Self-Filer by default. When the customer unchecks it, the system will ask the customer to provide the following participant information.(Actual Shipper, Actual Consignee, Actual 1st Notify Party, Actual 2nd Notify Party, Buyer, Seller)。



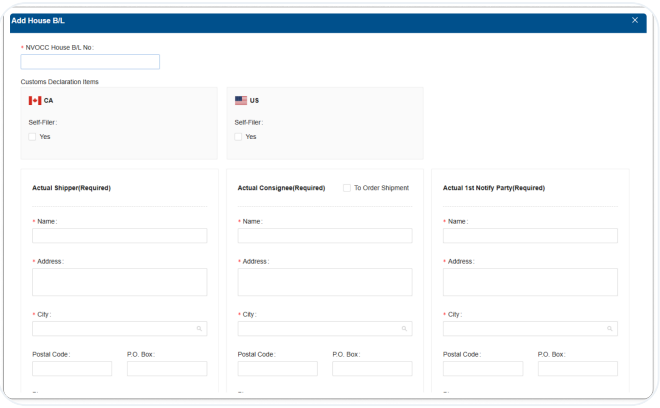
- CA R24 and US R24



- After the user opens the House B/L form window, if they select US as Self-Filer, the system will display the SCAC Code (US) input box, which is mandatory.

- If the user selects **all matched R24 filing items as self-filing**, the system will no longer display the input fields for Actual Shipper, Actual Consignee, Actual Notify Party, and Actual Second Notify Party.

  - If **US FROB** is matched and the user self-files the House B/L, the **Ship To Party** information fields are still displayed as optional supplementary information for the user to fill in.

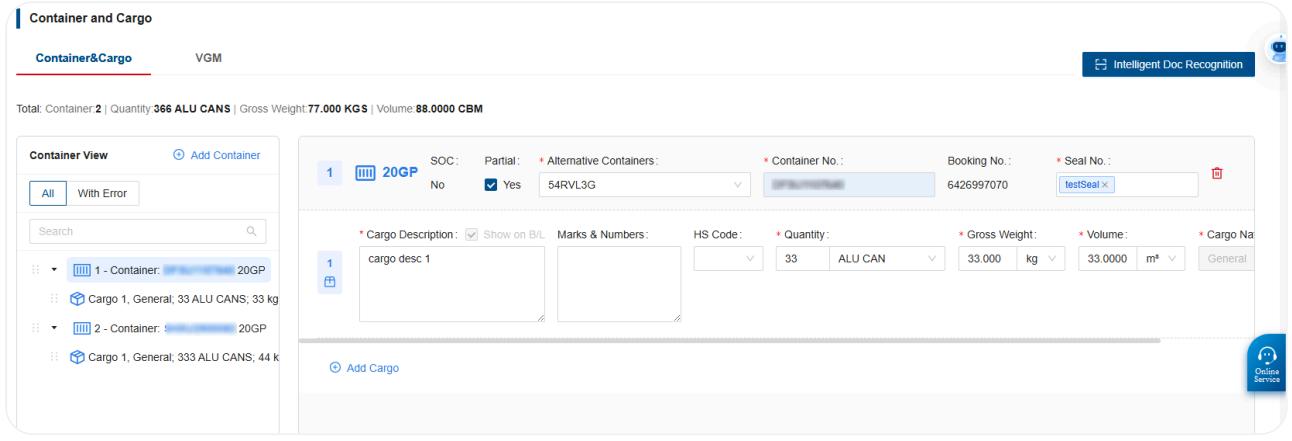

Add House B/L
* NVOCC House B/L No.:
Customs Declaration Items
CA
Self-Filer:
Yes
US
Self-Filer:
Yes
Actual Shipper(Required)
* Name:
* Address:
* City:
Postal Code:
P.O. Box:
Actual Consignee(Required)
To Order Shipment
* Name:
* Address:
* City:
Postal Code:
P.O. Box:
Actual 1st Notify Party(Required)
* Name:
* Address:
* City:
Postal Code:
P.O. Box:

Create/Edit B/L - Container and Cargo

Container and Cargo - Introduction

The Container and Cargo section consists of two main parts:

- Container-Cargo Relationship form, where the user enters container and cargo information.
- VGM Information form. After the user adds containers and cargo in the Container-Cargo Relationship form and switches to the VGM Information form Tab, they can view the tare weight of the container and the total cargo weight. If the VGM information of the container has already been submitted, the latest VGM information is displayed.
- If the **View B/L** page is opened via **B/L Request Tracking**, the VGM is the snapshot at that time, not the latest data.



Container and Cargo Information - Container View

In the Container View, each container record is displayed as a node. Under the container node are cargo nodes (see Figure 1).

- The user can click a container node, and the right panel will load the container-level information and the cargo details of the container.

- The user can drag the Icon in front of the container node (highlighted in Figure 2) to adjust the display order of a container.

- The user can drag the Icon in front of the cargo node (highlighted in Figure 2) to adjust the display order of a cargo item, as well as the cargo allocation relationship.
  - For example, dragging cargo A of container A under the node of container B means that cargo A belongs to container B, and it also means that cargo A is automatically disassociated from container A.

Figure 1

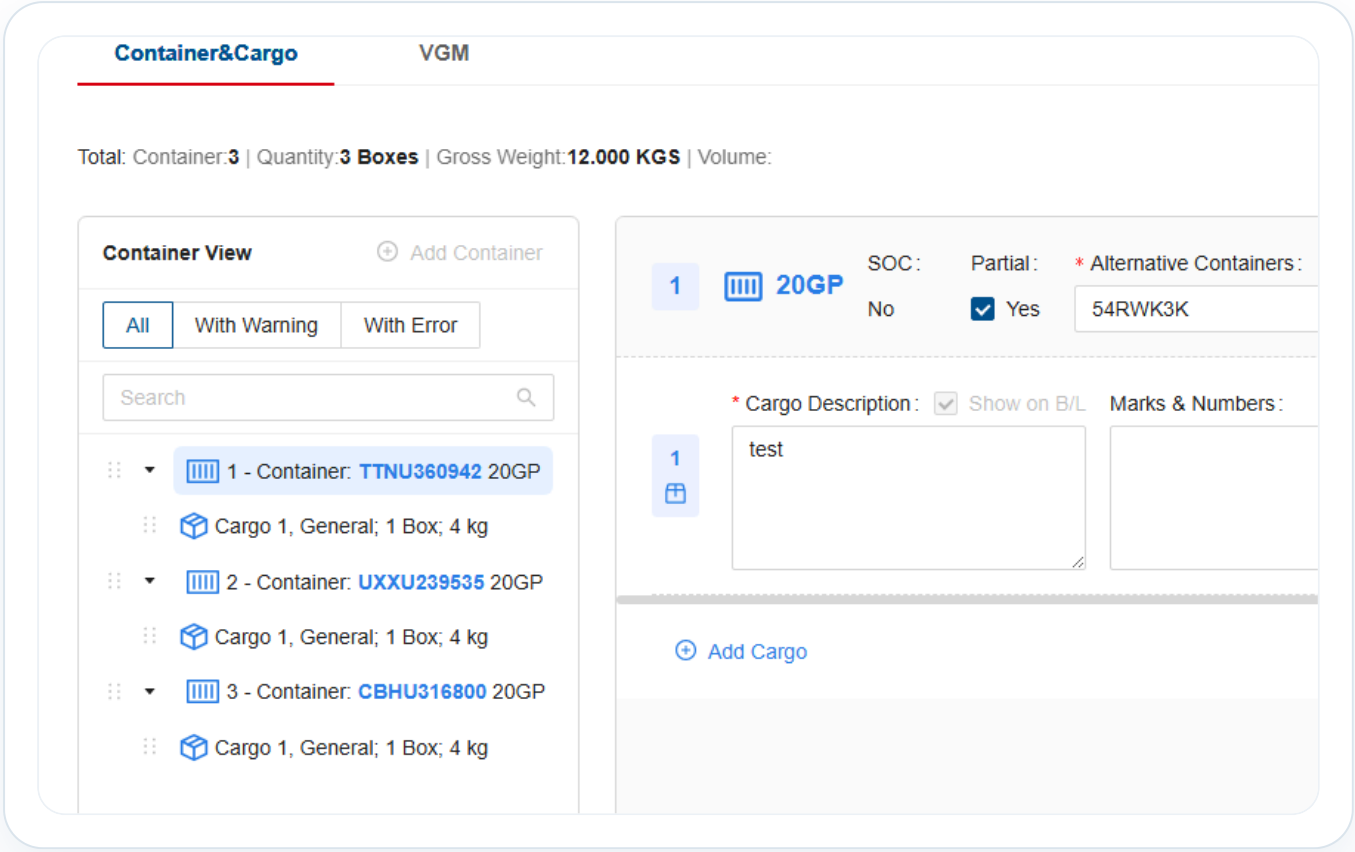
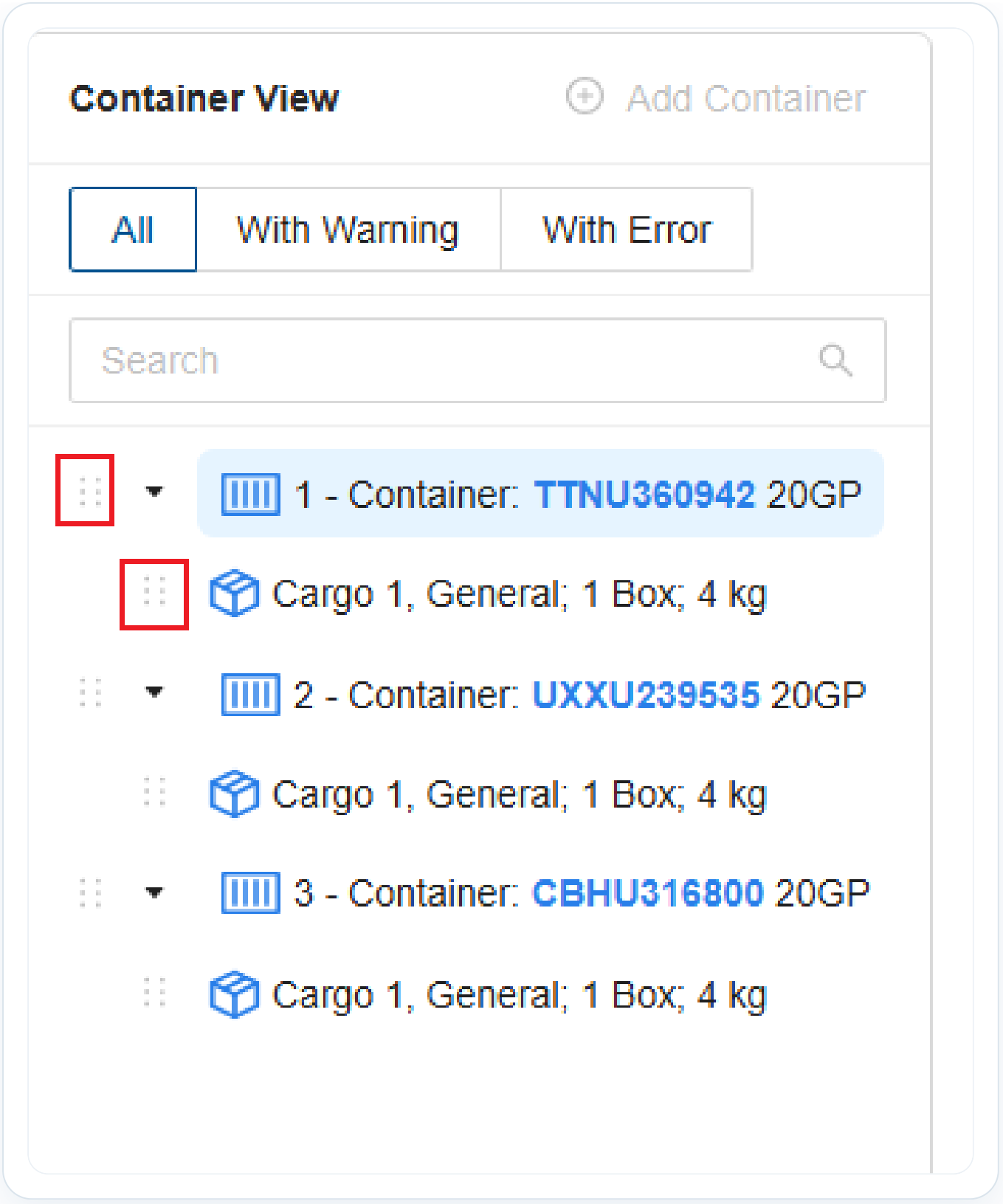


Figure 2

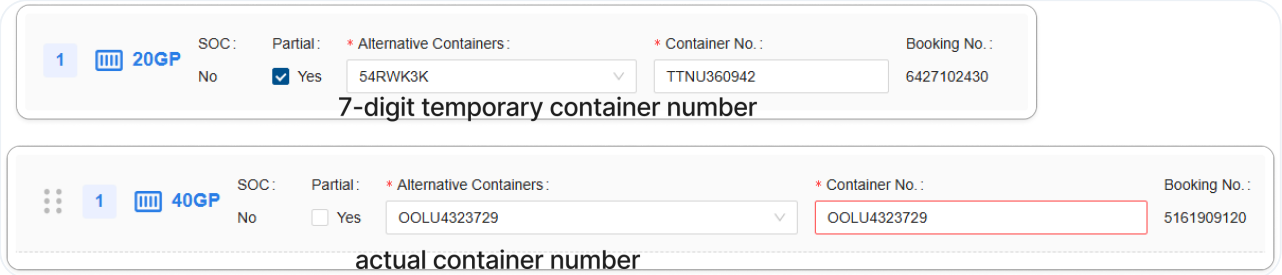


Container and Cargo Information - Container Data Entry 1

Click **Available Containers** to select a container associated with the entered booking number. Only one container can be selected at a time.

- If the selected container does not have an actual container number record (possibly not yet entered in the system), the system will display a 7-digit temporary container code. The user then needs to enter the real container number in the **Container No.** input box according to the actual situation.

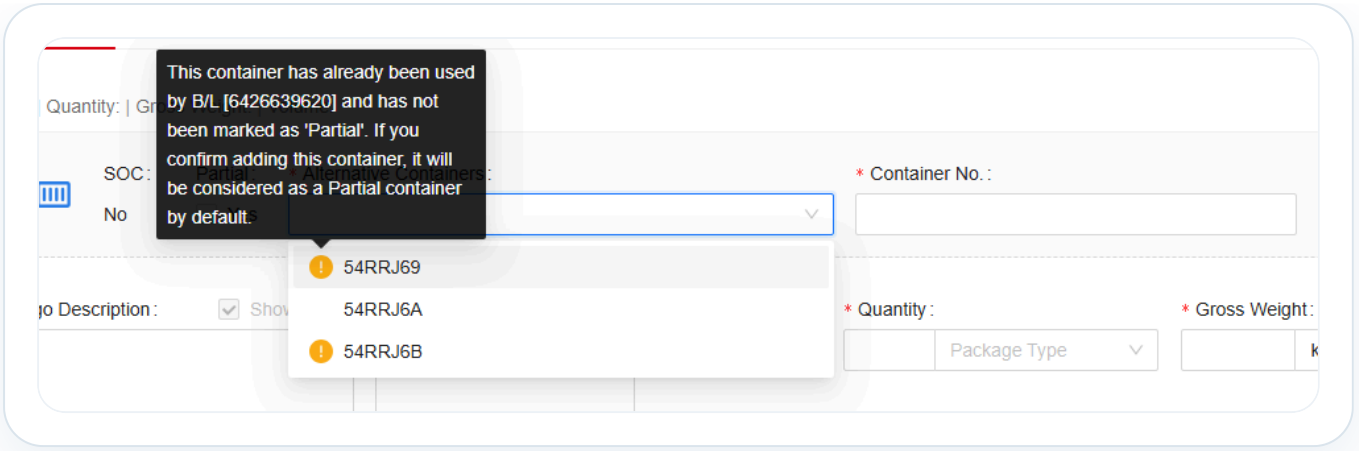
- If the selected container has a real container number, that real container number will be automatically filled into the **Container No.** input box.
  - If the user finds that the container number automatically loaded by the system does not match reality, they can click the **Container No.** input box and then enter a new container number.



Container and Cargo Information - Container Data Entry 2

- If a container has already been used in another B/L and is not marked as Partial, that container option will display a warning icon in the **Alternative Containers** drop-down list.

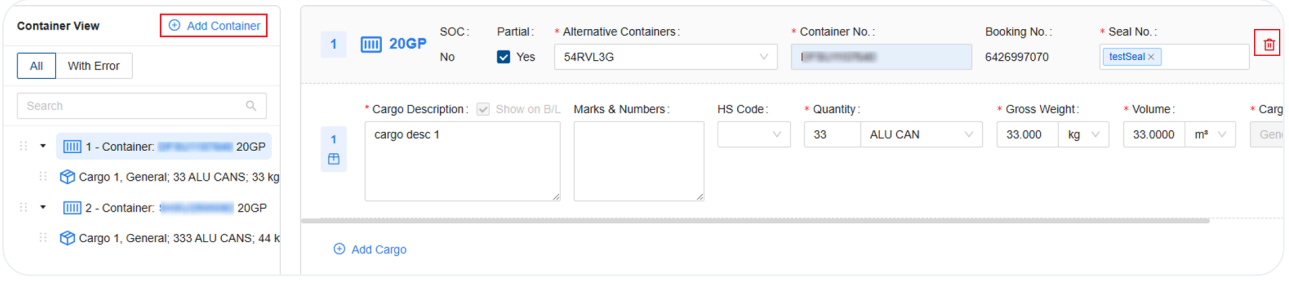
- When the user hovers the mouse over the warning icon, the system will display a tooltip indicating that the container has been used. If the user continues to select it, the container will be marked as **Partial** and the user cannot change it. At the same time, after the user submits the B/L creation/amendment request, the system will automatically update the other existing B/Ls associated with that container.



Container and Cargo Information - Container Data Entry 3

- If the entered booking contains multiple containers, the user can click **Add Container** to add multiple containers. The number of containers must not exceed the number of containers contained in the booking within the B/L.
  - If the number of containers in the form has reached the upper limit of available containers for the entered booking, the **Add Container** button is no longer available.

- The user can click the delete icon on the right side of the container row to delete the container record. After deletion, the system will also delete the cargo items under the container.



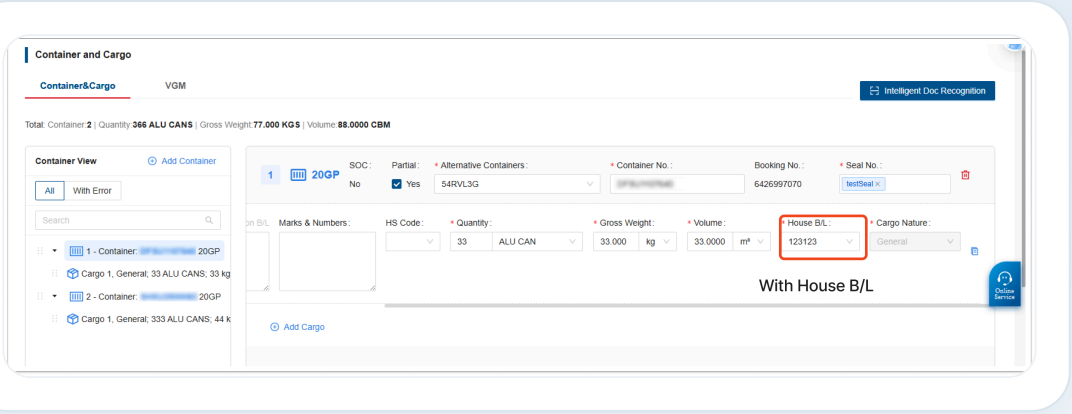
Container and Cargo Information - Cargo Data Entry 1

- After the user adds a container, a cargo item is included under the container by default

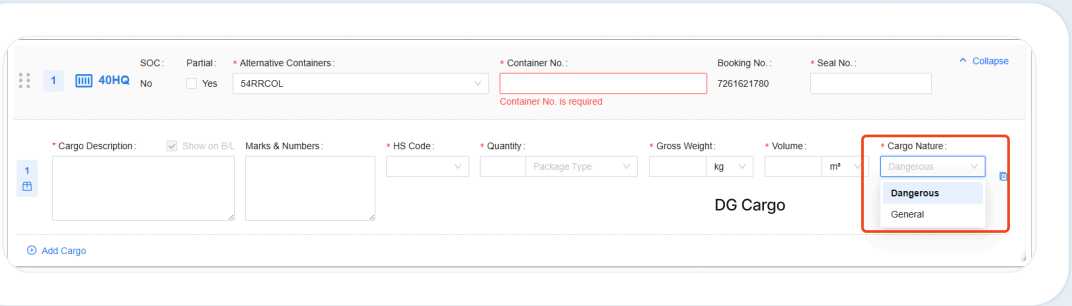
and cannot be deleted.

- For each cargo item, the user must enter Cargo Description, HS Code, Quantity, Gross Weight, and Volume.

- If the B/L contains a House B/L, the user needs to select an entered House B/L for each cargo item to associate with.

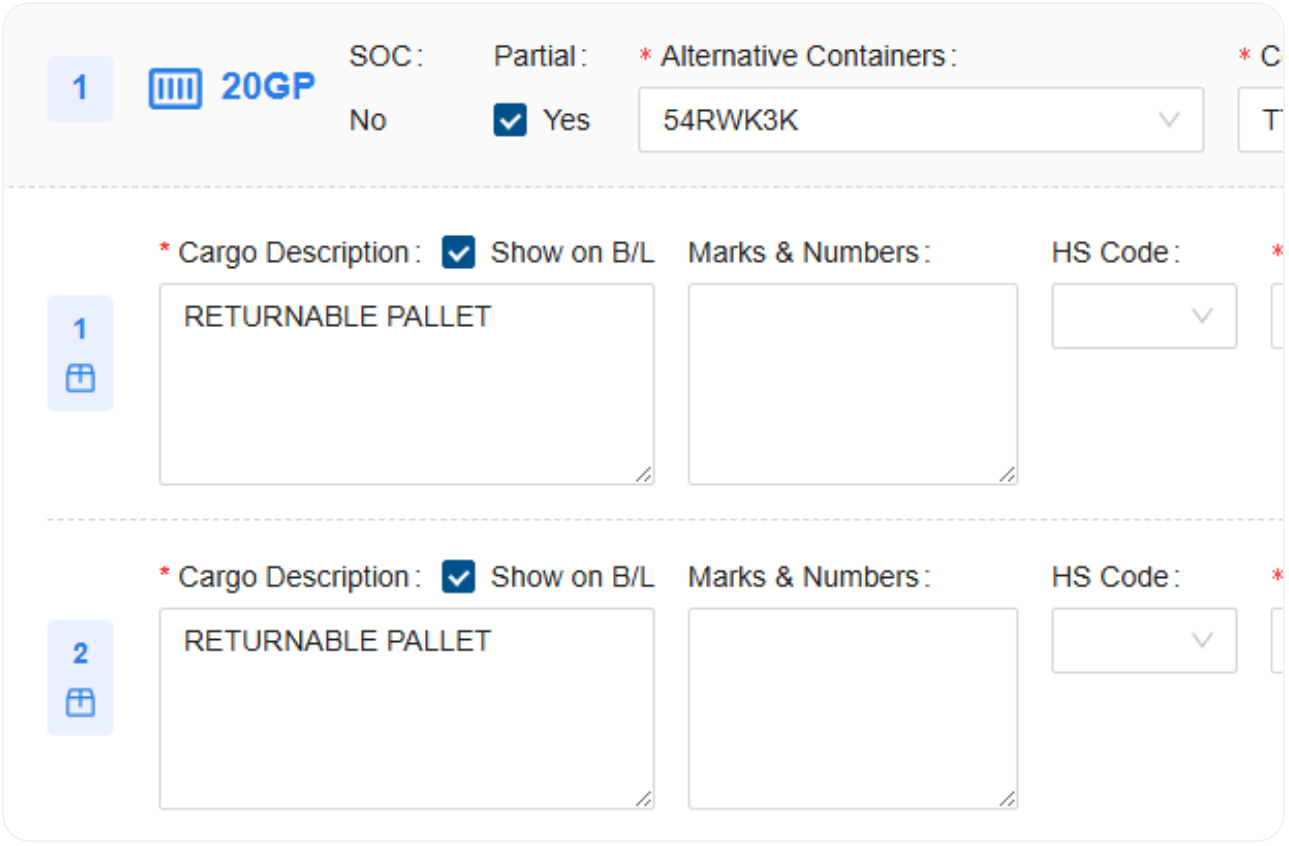
- If the current cargo item belongs to a container of a Dangerous-type booking (including Dangerous; Reefer + Dangerous; Awkward + Dangerous), the Cargo Nature of the cargo item must be indicated.

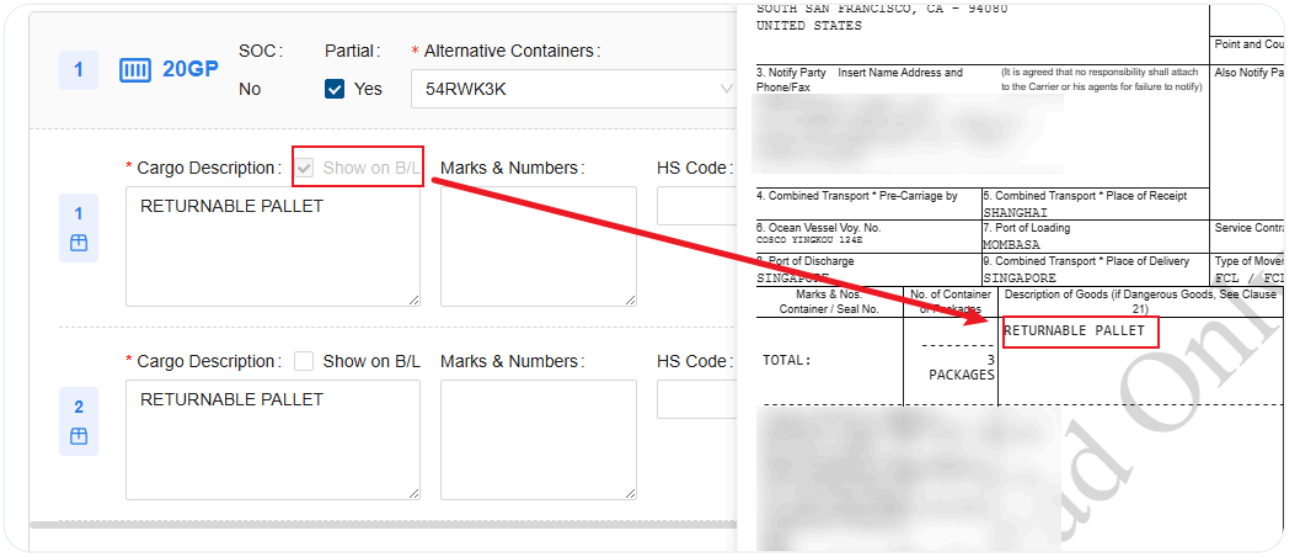
Container and Cargo Information - Cargo Data Entry 2

- The user can choose whether to display the Cargo Description of a cargo item on the B/L, provided that the Cargo Description of this cargo item is not unique. A unique Cargo Description must be displayed on the B/L.

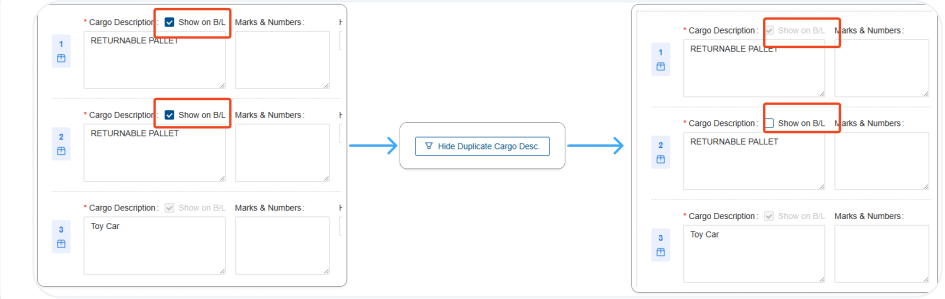
- When the system finds that the Cargo Description of the current cargo item is consistent with that of another cargo item, the system **allows the user to uncheck** the **Show on B/L** checkbox for one of the duplicate cargo item's Cargo Description.



- Only the Cargo Description with **Show on B/L** checked will be displayed on the B/L preview page. Cargo Description without **Show on B/L** checked will not be displayed on the B/L.

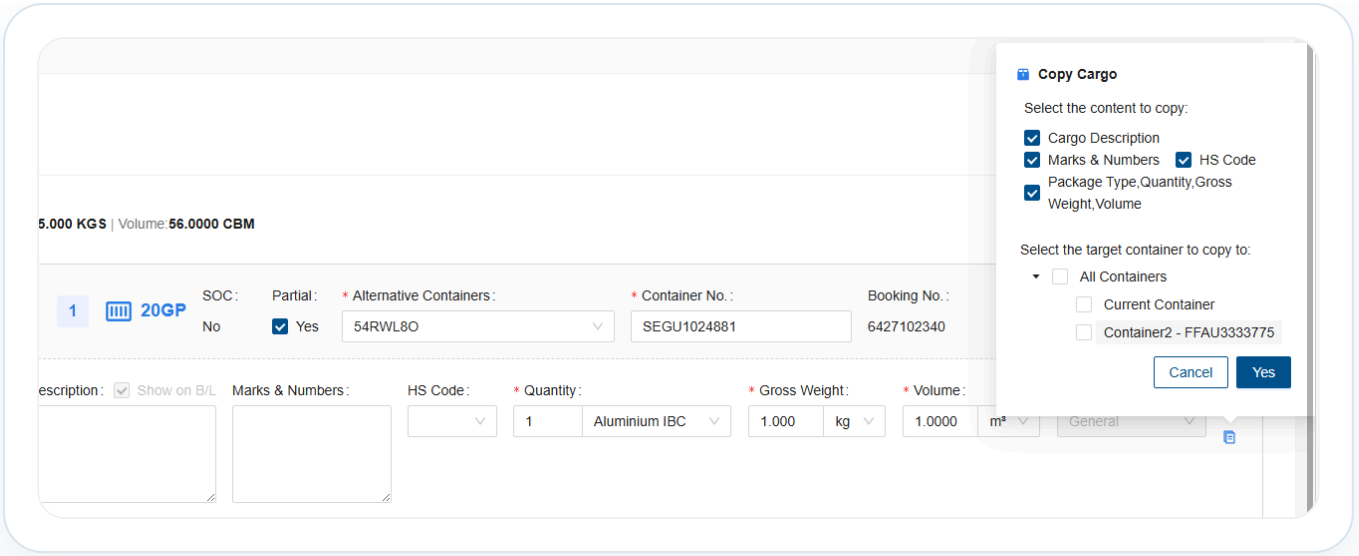


- Hide Duplicate Cargo Desc
  - Click this button to verify that all cargo descriptions are unique. If duplicate cargo descriptions are detected, the system automatically selects **Show on B/L** for one of the duplicate descriptions.



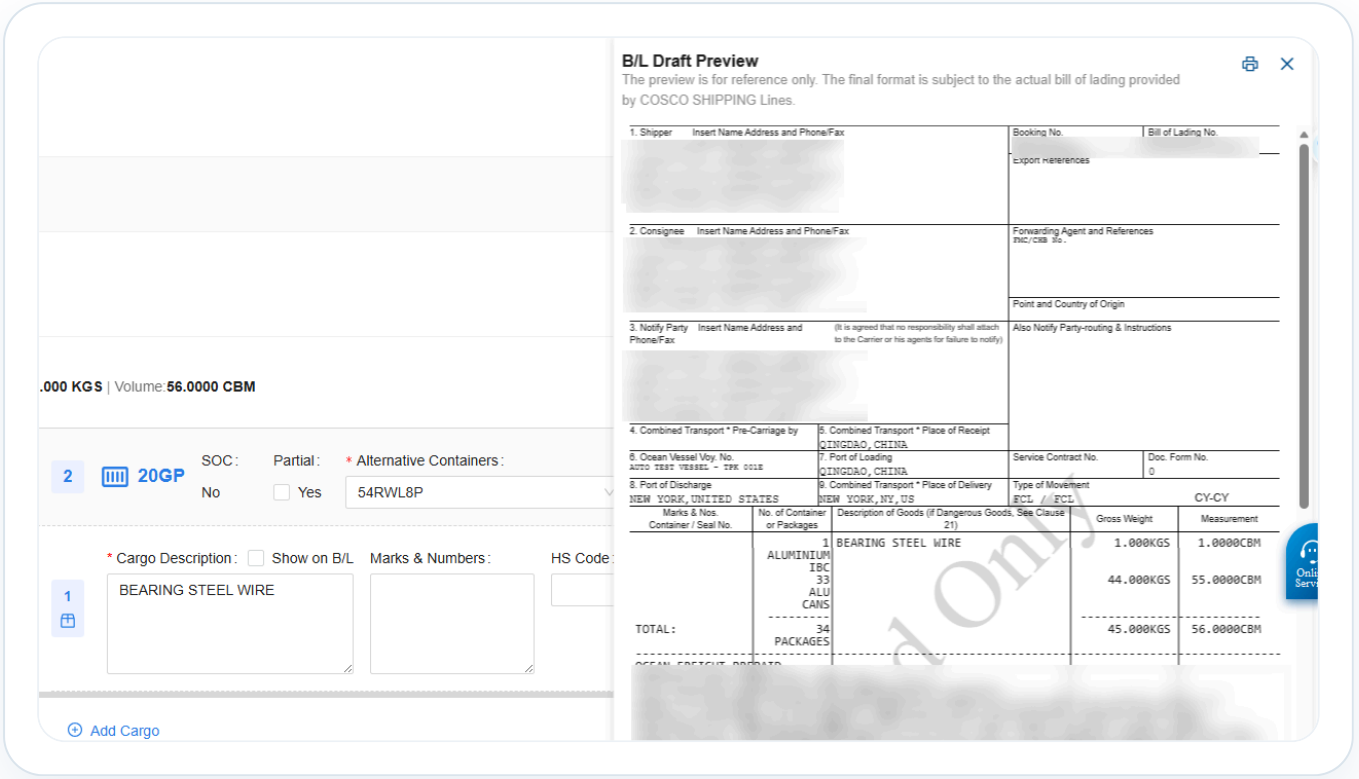
Container and Cargo Information - Cargo Data Entry 3

- The user can select a cargo item and click the copy icon on its right to copy the current cargo's **Cargo Description, Shipping Marks, HS Code, Package Information, Quantity, Gross Weight, Volume** to a specified container as a new cargo item.



Container and Cargo Information - B/L Draft Preview

- The user can click the **B/L Draft Preview** button to view in real time how the entered container and cargo data is presented on the B/L draft. The user can adjust the information entry based on the real-time preview.



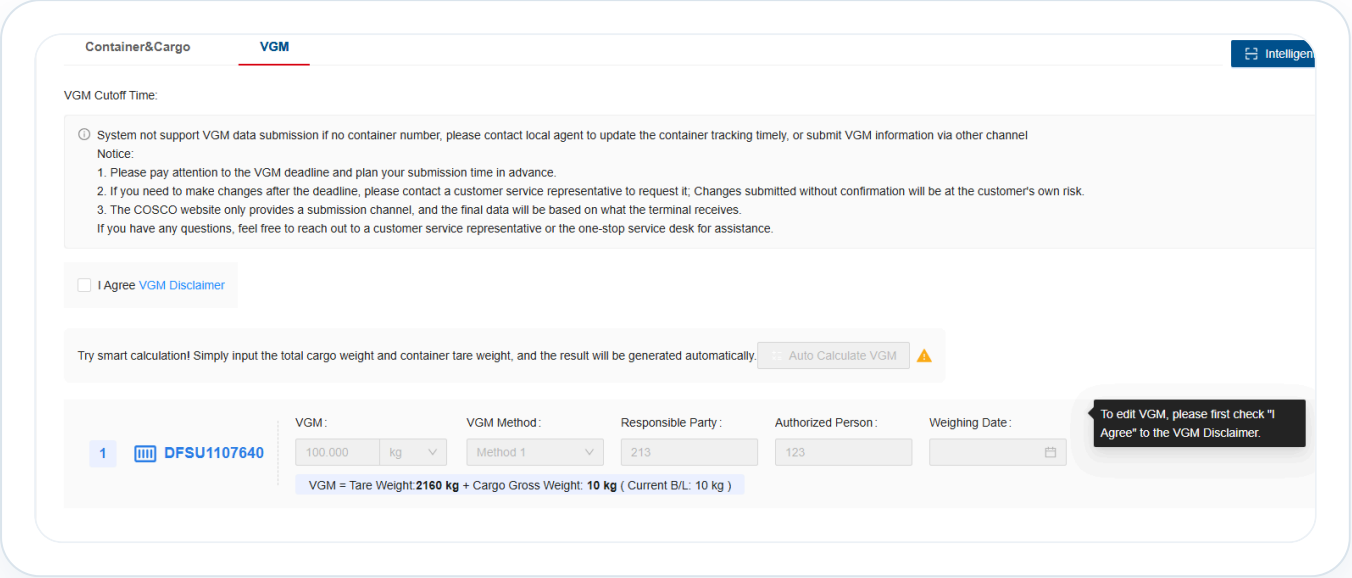
Container and Cargo - VGM 1

After completing the entry of container and cargo information, the user can switch to the VGM Tab to view the tare weight of the container and the total cargo weight.

- The system will display the tare weight of each container (tare weight information may be missing) and the total weight of the cargo under the current container (if it is a Partial container, this includes the total cargo weight under the current B/L and the total cargo weight under other B/Ls).

- If the VGM information is not fully entered, the user can enter it manually or use Smart Calculate VGM.

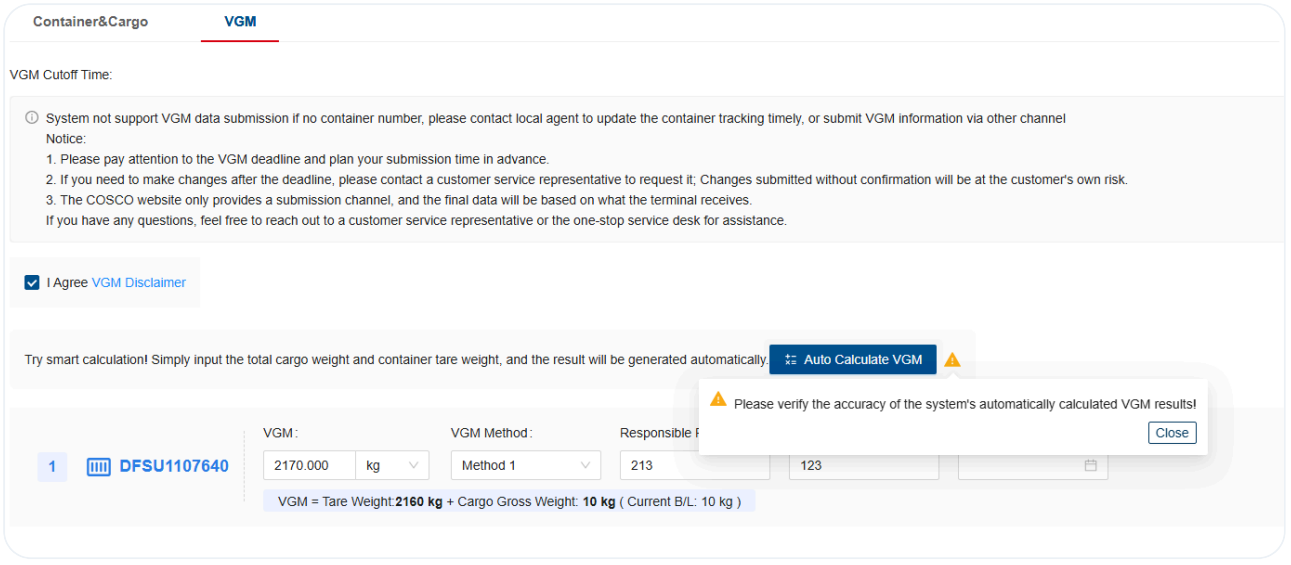
- Before entering the VGM information of the container, the user must check the I agree to the VGM Additional Declaration checkbox. Otherwise, the system does not allow the user to enter the related VGM information.



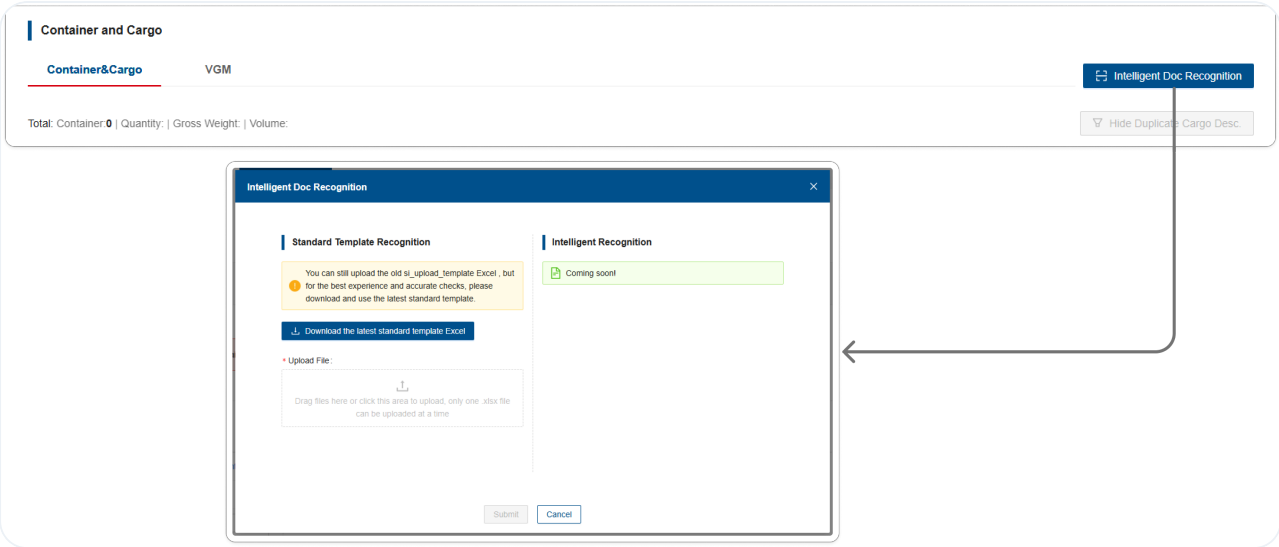
Container and Cargo - VGM 2

If the user wants the system to automatically calculate the VGM of the current B/L container based on the tare weight of the container and the total cargo weight, the user can click the Smart Calculate VGM button. After clicking, the system will automatically calculate the VGM of each container of the current B/L. If the VGM of a container has already been submitted, the system will still recalculate the VGM based on the total cargo weight of the container and the tare weight of the container.

- If the unit of cargo weight is not kg, the system will convert it to kg during Smart Calculate VGM.
- If the type of a container is Partial, the system will also display the weight of the cargo items of that container in other B/Ls in the calculation formula below the VGM record.
- The user needs to verify whether the VGM information is correct.
- If the tare weight of the container cannot be obtained, the VGM of the current container will not be automatically calculated, and a reminder will be shown.



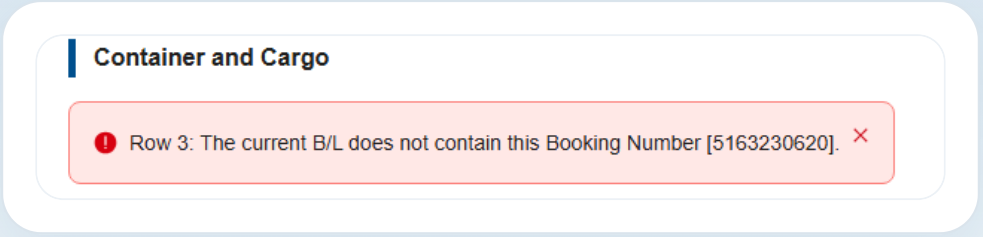
Import Container and Cargo Information Using the Standard Template



When handling large volumes of container and cargo details, you can use the standard Excel template to upload and populate data in bulk, reducing manual entry and improving efficiency.

- Open the Upload Window
  - Navigate to the **Container & Cargo Information** tab.
  - Click **Intelligent Doc Recognition** to open the upload window.
- Download the Standard Template
  - Click Download Latest Template to download the latest standard Excel template.
  - Complete the template by following the instructions provided within the file.
  - > You may continue using the standard Excel template from the legacy ACZone system. However, we recommend using the latest template, as older versions may not support newly introduced features.
- Upload and Parse Data

- After completing the template, upload the Excel file.
- The system automatically validates and parses the uploaded data.
- Successfully parsed data is populated into the corresponding fields in the form.

- Error Handling
  - If any data fails validation or cannot be parsed successfully:
  - Error messages are displayed under the Container and Cargo section.
    - 

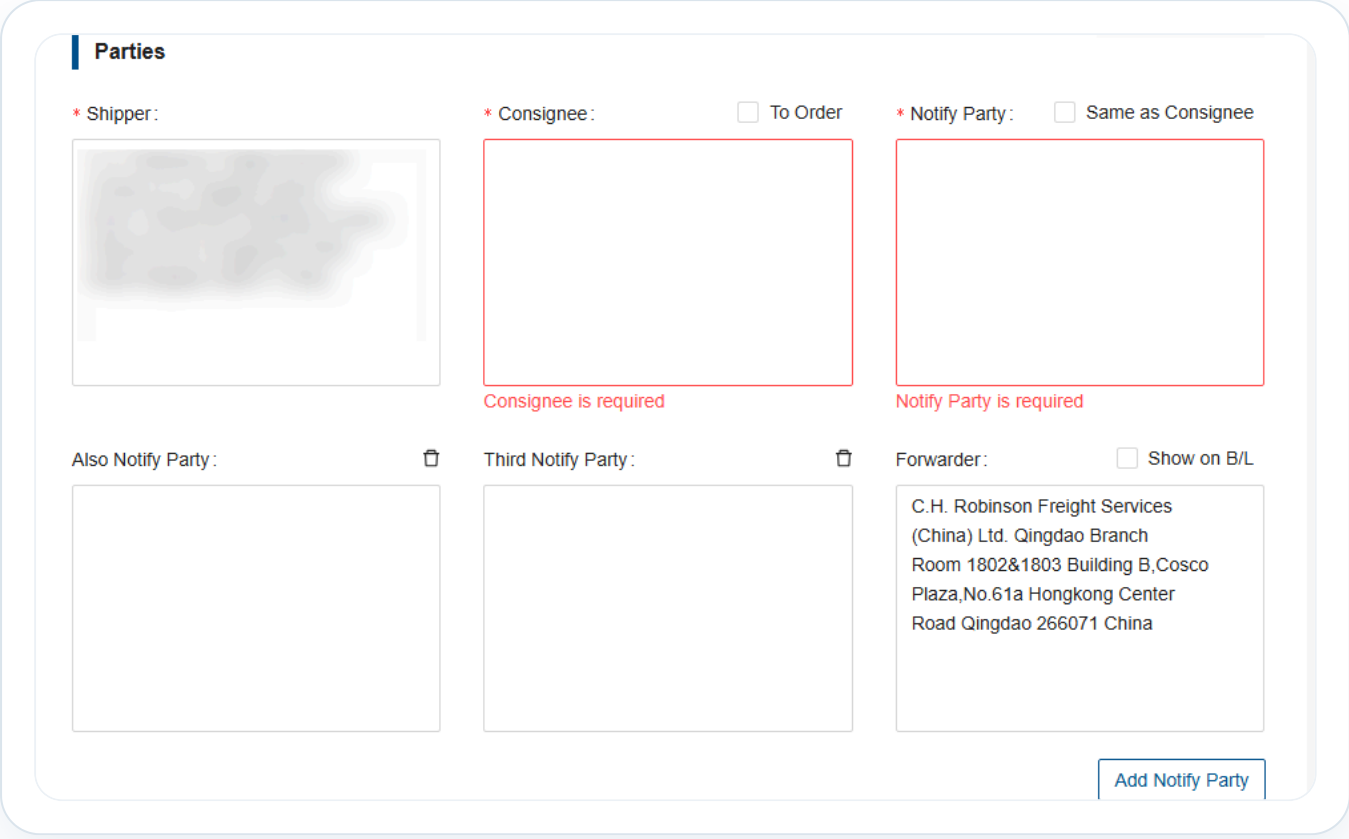
  - Review the reported errors and update the Excel template accordingly.
  - Re-upload the corrected file to process the data again.

Submit B/L Request

When the customer completes the form information for Create B/L or Edit B/L and clicks the submit button, the system will validate the form information.

Information Validation - Form Information Validation

- When the user has not completed the entry of required information or the entered information is incorrect, upon clicking submit, the system will prompt the user which Tabs contain errors to fix, and the system will automatically navigate (scroll) the page to the position of the first error.

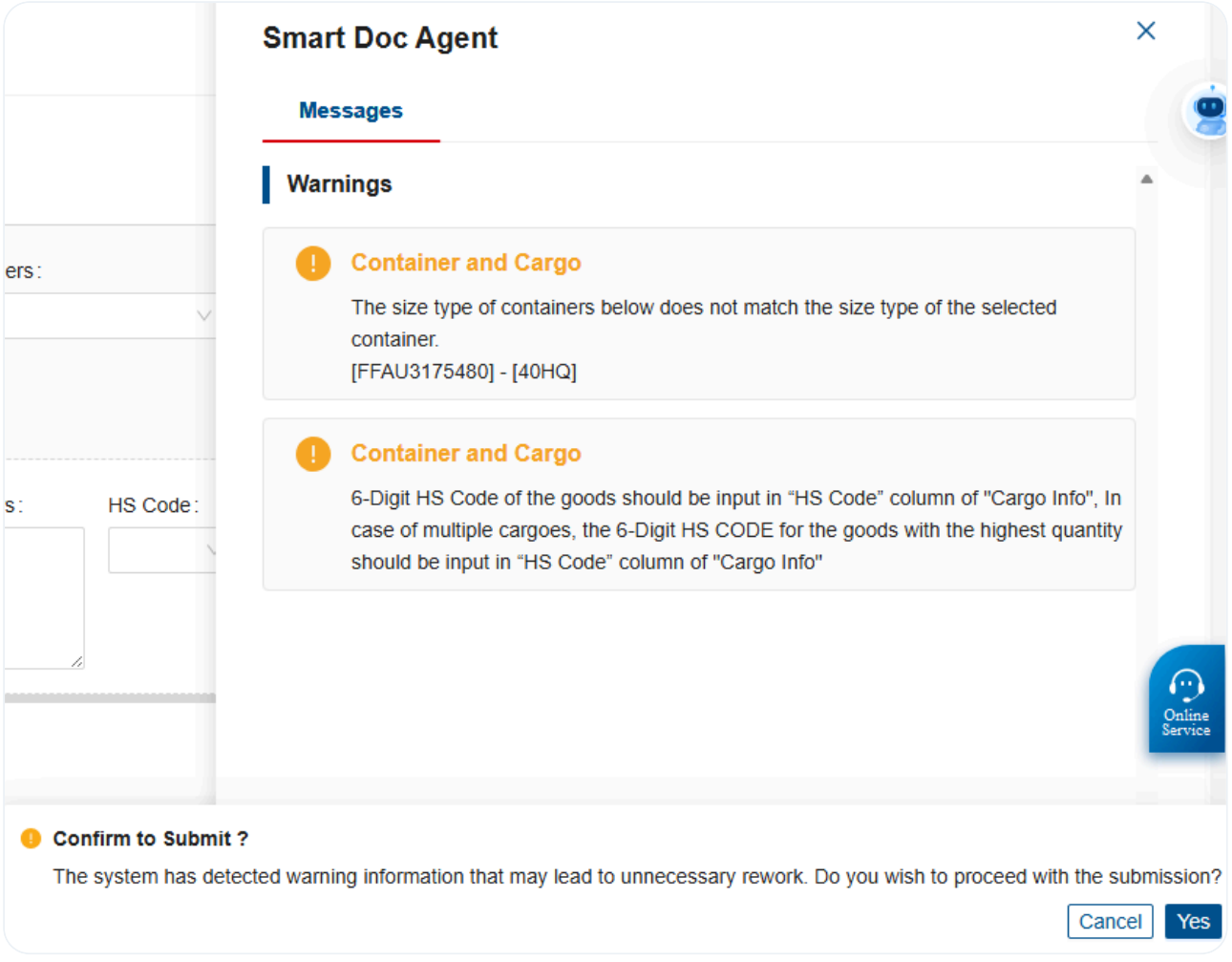


Information Validation - Smart Validation

When the user has completed the entry of required information and there are no error reminders, the user clicks submit, and the system will perform backend smart validation:

- If the validation result passes, the system will jump to the successful submission page.

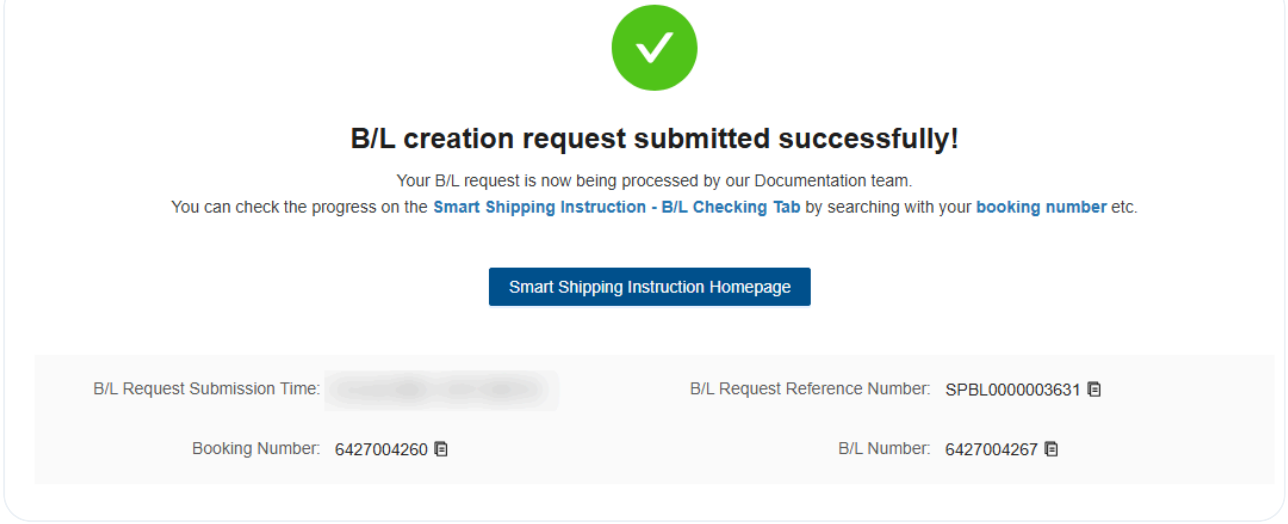
- If the validation result contains warning messages, the user will be prompted whether to continue submitting.
- If the validation result contains error messages, the user will be prevented from submitting, and the error reminder will guide the user to fix the error.
- Warning messages and error messages will be displayed within the Smart Doc Agent.



Submit B/L Request - Result Display

- After the user submits, if the validation result passes, the system will jump to the successful submission page.

- The system will display the corresponding B/L Request Number, B/L Number, and the Booking Number entered by the user.

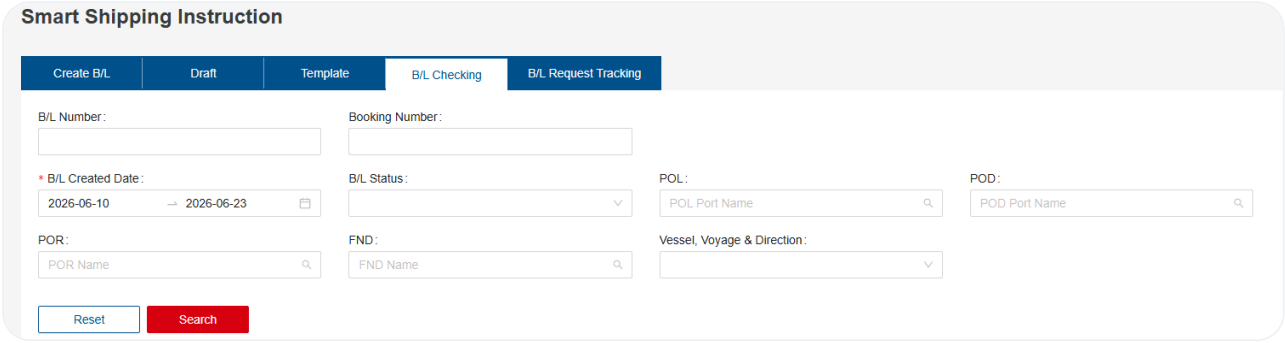


Search and Check B/L

B/L Checking - Introduction

- If the user needs to check a B/L or wants to know whether the submitted B/L Creation Request has completed B/L creation, they can click the **B/L Checking** Tab on the **Smart Shipping Instruction** home page to switch to the search interface.

- **B/L Checking** is used to query B/L records, view B/L Proforma, accept B/L Proforma, download B/L Proforma, edit B/L, and view B/L history.
  - The system restricts users to access only data within the most recent 6 months.



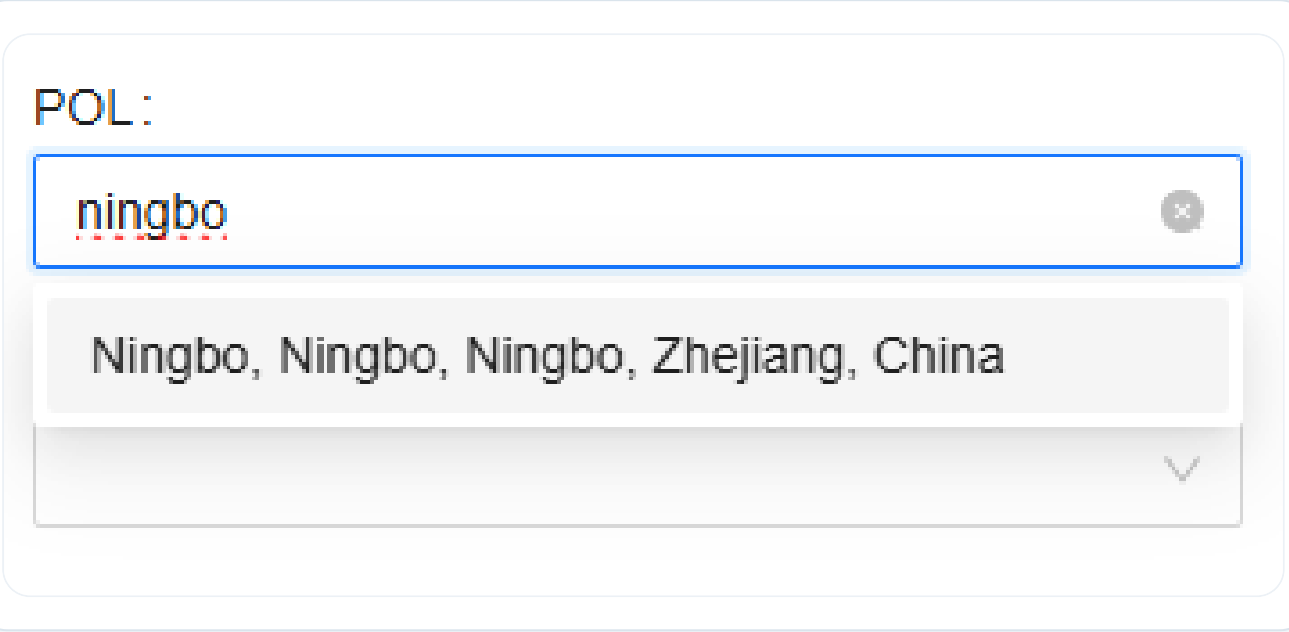
B/L Checking - Search Criteria

The user can search for bills of lading based on the following criteria, and can know the latest status of the B/L.

- B/L Number. After the user submits a B/L Creation Request, the system will pre-allocate a B/L Number. The user can use this number to search for B/L records.

- Booking Number. The Booking Number entered by the user when submitting the B/L Creation Request and Amendment Request.

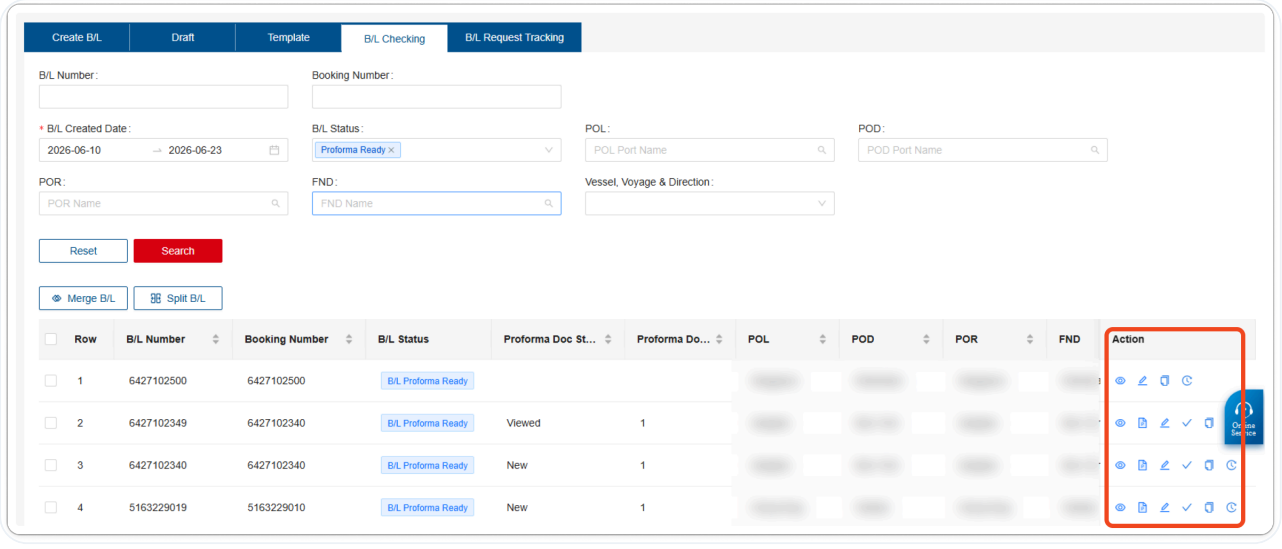
- B/L Creation Date. Supports a span of up to half a year.
- B/L Status. Currently, three statuses are available: Under Review, Proforma Ready, B/L Ready.
- Port of Loading. The user can enter the port name, and the system will automatically suggest it. The user can select an option.
- Port of Discharge. The user can enter the port name, and the system will automatically suggest it. The user can select an option.
- Place of Receipt. The user can enter the place name, and the system will automatically suggest it. The user can select an option.
- Final Destination. The user can enter the place name, and the system will automatically suggest it. The user can select an option.
- Vessel, Voyage and Direction. The user can enter text and then select from the drop-down list.



B/L Checking - Search Results

The user can perform the following operations in the action column of the search results table

- View B/L. Opens the B/L in read-only format.
- Amend B/L. Opens the selected B/L for editing.
- View B/L Proforma in PDF format. This action entry is displayed only when the B/L status is proforma ready. The user can click it to view the printout of the B/L Proforma.
- Accept B/L Proforma. This action entry is displayed only when the B/L status is proforma ready. The user can click it to confirm whether to accept.
- Copy as New. Copies part of the information of the selected B/L, such as Party and B/L Handling Instructions, then opens a new B/L Creation Page and initializes the data.
- View B/L Update History. Opens the B/L Amendment History page.



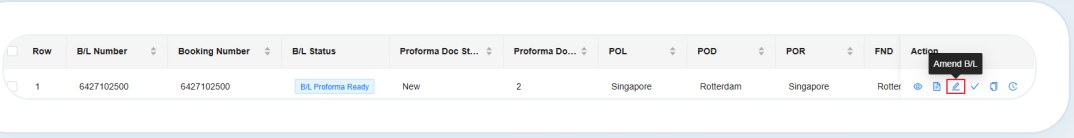
Edit (Amend) B/L

Open B/L Edit Page

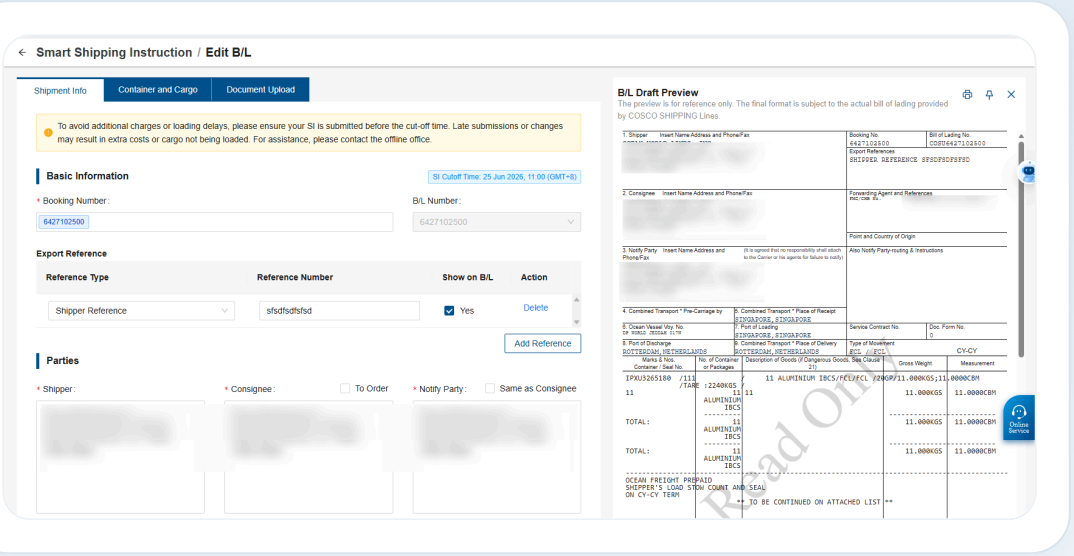
The user can search for the target B/L within the **B/L Checking** Tab, then click the edit icon (Figure 1) in the action column to open the B/L edit page.

After opening the B/L edit page (Figure 2), the system will load the latest information of the B/L.

- Figure 1

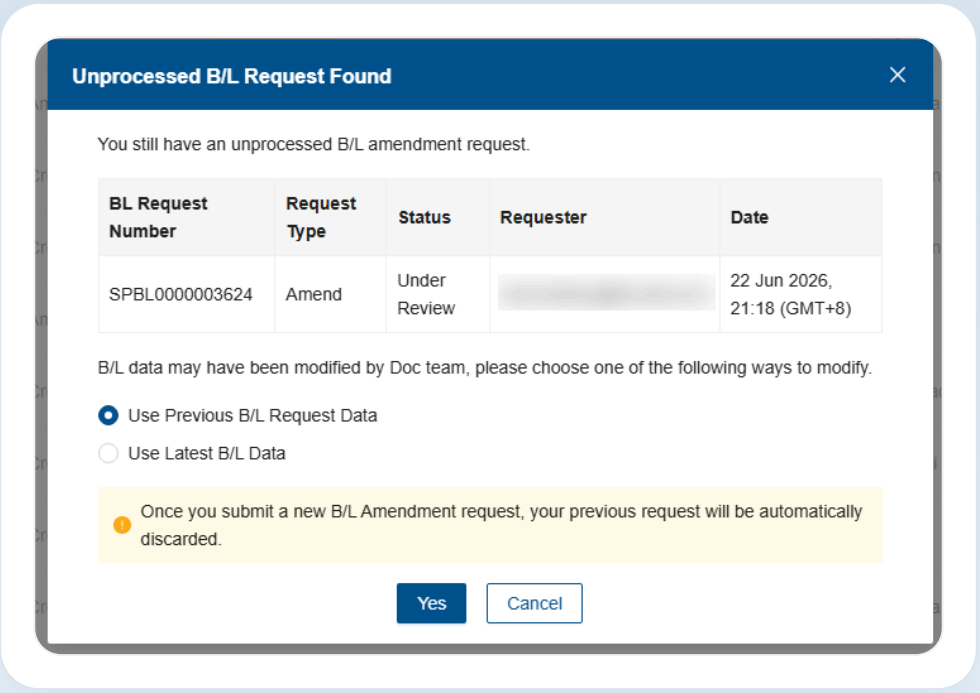


- Figure 2



Open B/L Edit Page - Pending B/L Request Exists

- When clicking the B/L edit icon:

- If the current B/L has an incomplete **B/L Request** as shown below.
  - 

  - If the user selects a B/L Request to open the B/L edit page, the form will load the data of the selected B/L Request.
  - If the user selects to edit using the latest B/L data, the form will load the latest data of the current B/L.

B/L Edit Data Entry

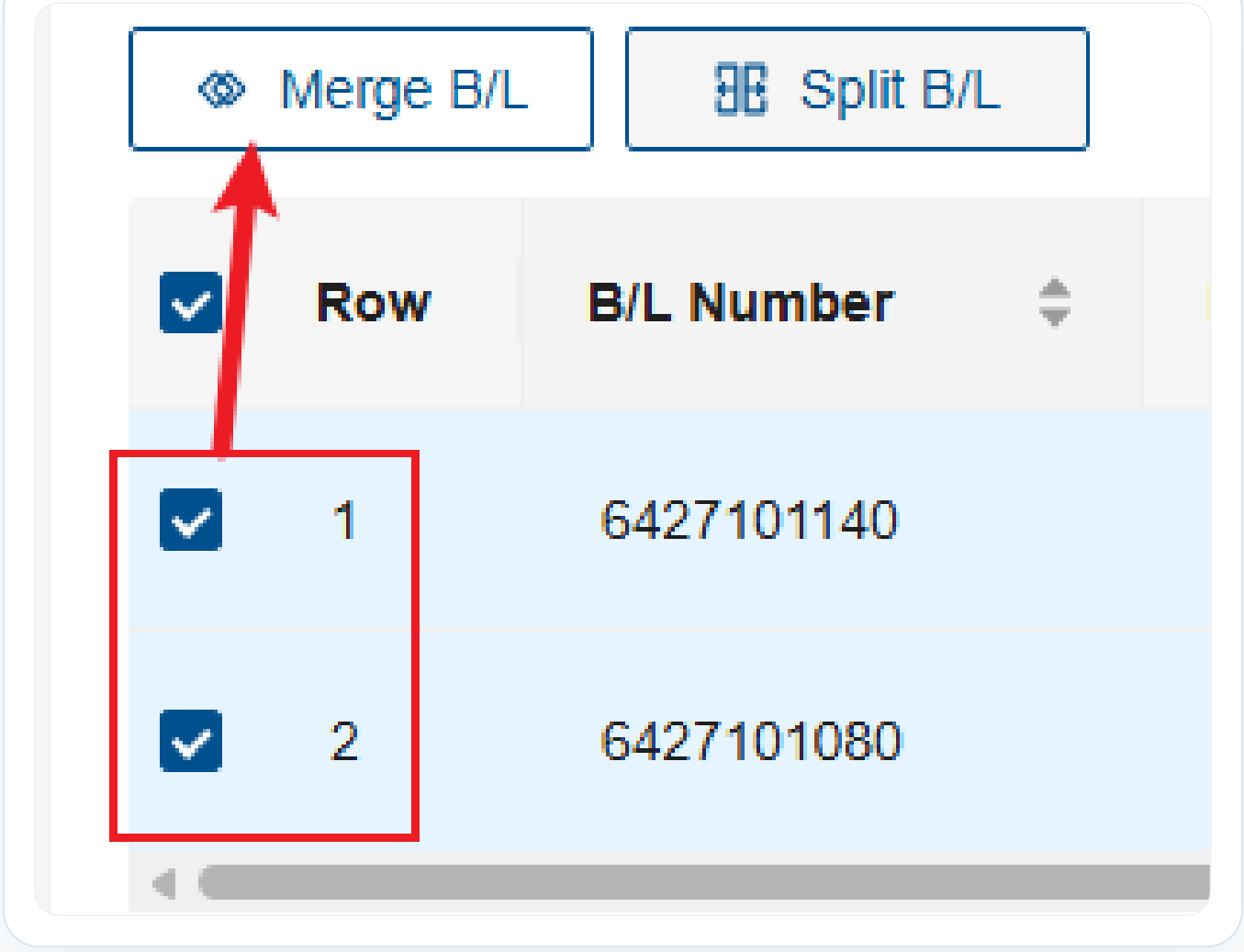
- The form on the B/L edit page is basically the same as the form on the B/L Creation Page. For detailed operations of the form, please refer to the previous slides.

Merge B/L

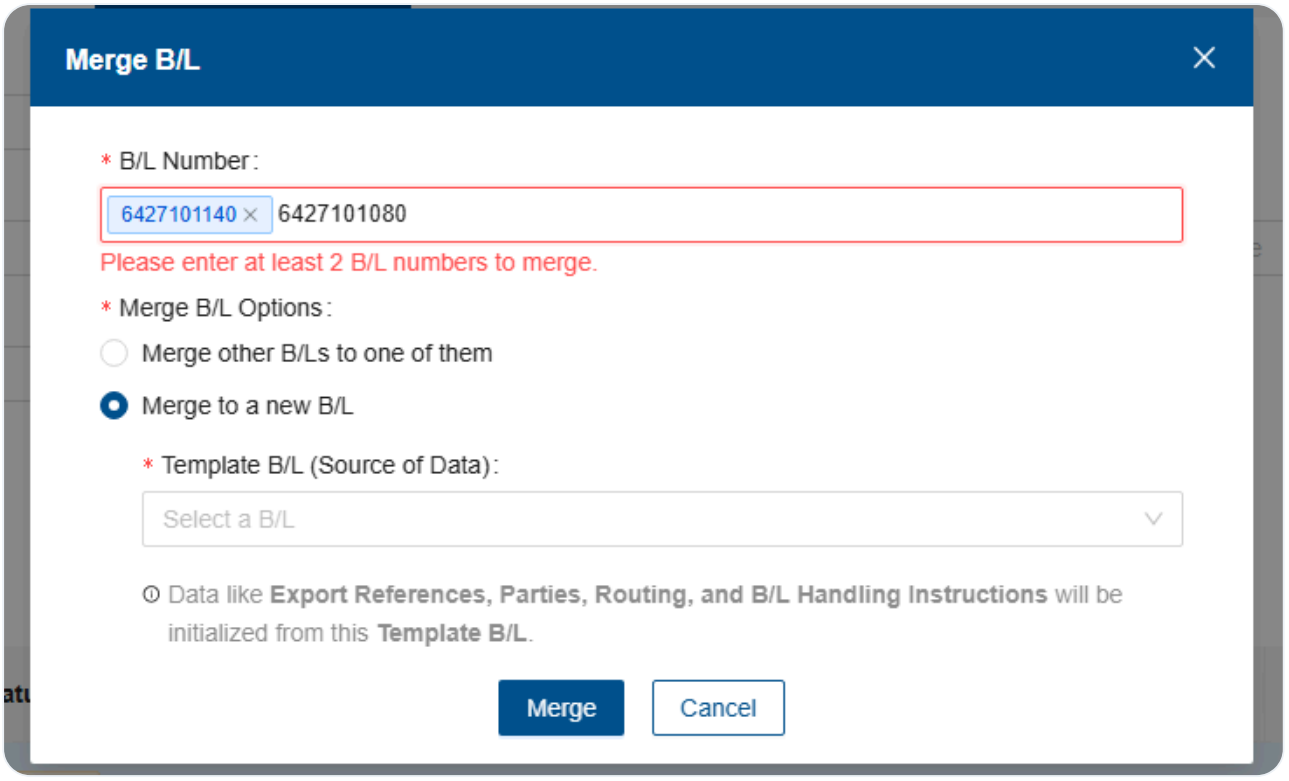
Merge B/L - Select Merge Mode

Entry point:

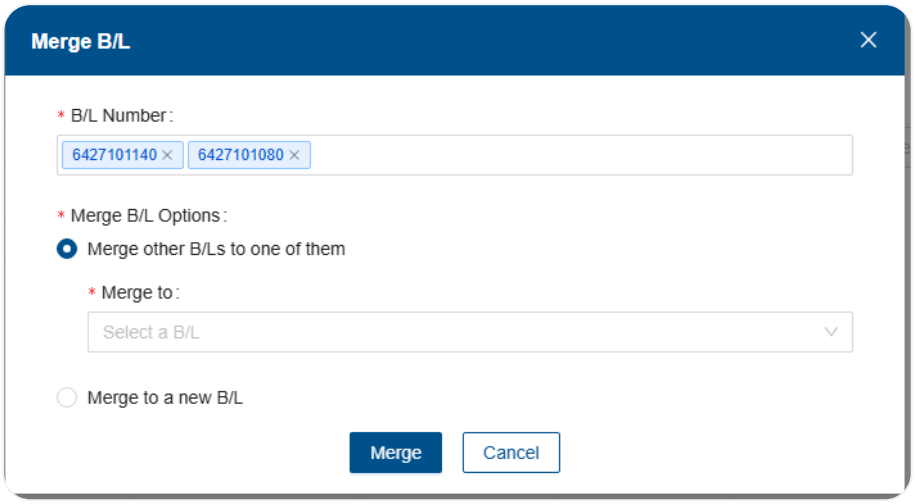
- Method 1: The user searches for the target B/Ls under the B/L Checking Tab, selects them, and clicks the Merge B/L button to open the Merge B/L window.



- Method 2: The user directly clicks the Merge B/L button under the B/L Checking Tab, and in the B/L Number input box in the opened Merge B/L window, enters the B/L Numbers to be merged, at least two.



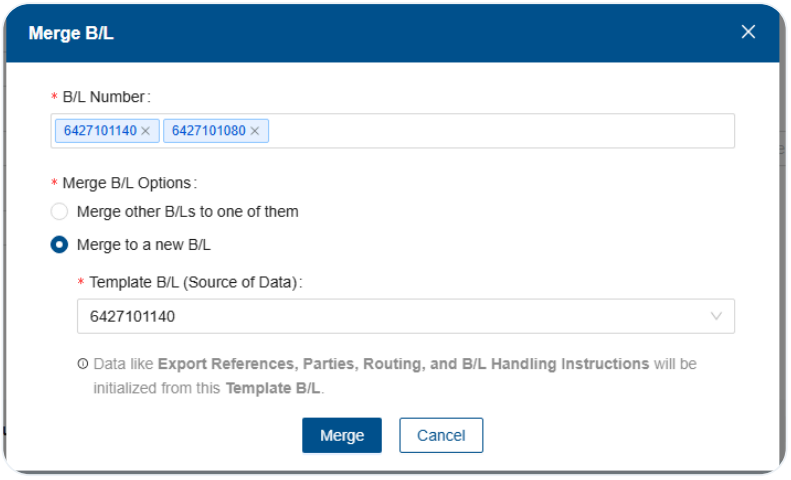
Merge B/L - Select Merge Mode

- The user can select two or more B/Ls to merge. The merge modes are:
  - Merge other B/Ls to one of them
    - 

    - If this mode is selected, the user needs to select a target B/L, click the Merge Into drop-down list, and select a B/L.

- Then click Merge. The system will open the edit page of the target B/L and add the container and cargo information of the other B/Ls to the current B/L.

- Merge to a new B/L



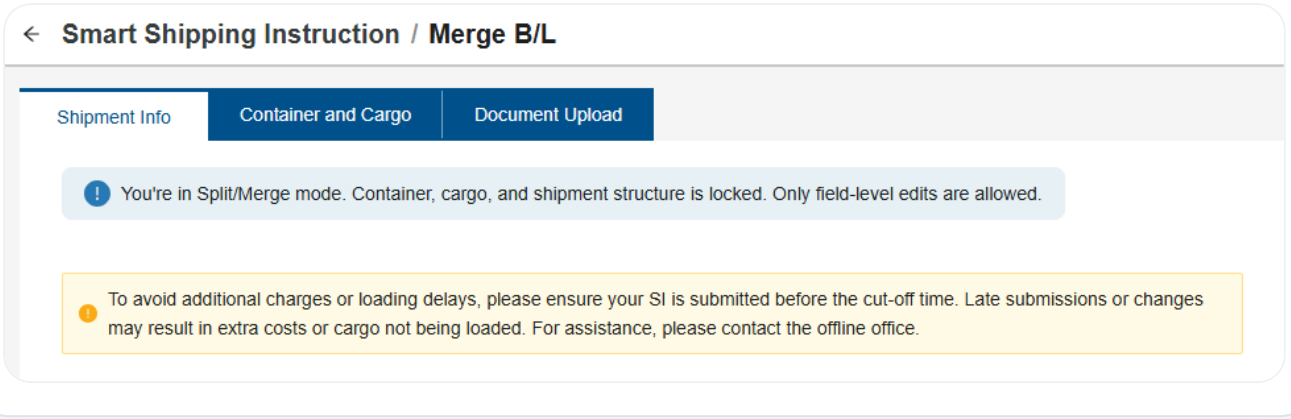
  - Select a template B/L to initialize the Export Reference, Party, Route, and B/L Handling Instructions information.

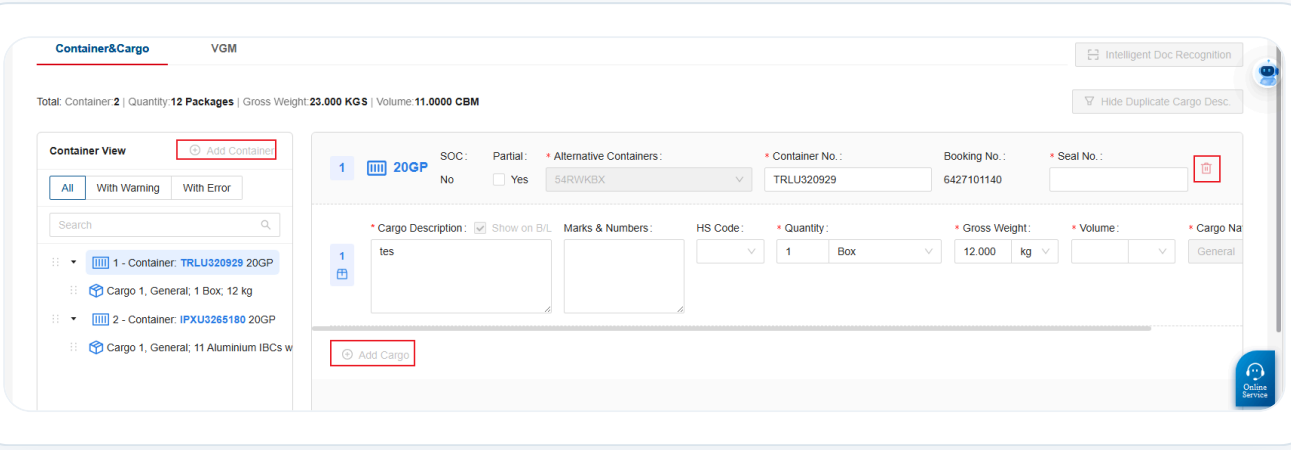
  - After selection, click Merge to open the B/L Creation Page. Add the container and cargo information of all selected B/Ls to the current B/L.

- Note: Only B/Ls with the same Carrier, Booking Office, and Route information can be selected to submit a B/L merge request.

Merge B/L - Open Create/Edit B/L Page

- Regardless of which merge mode is used to open the B/L Creation Page or B/L edit page, the user is not allowed to continue adding or deleting bookings, containers, and cargo information. The user is only allowed to edit the values of their attributes.

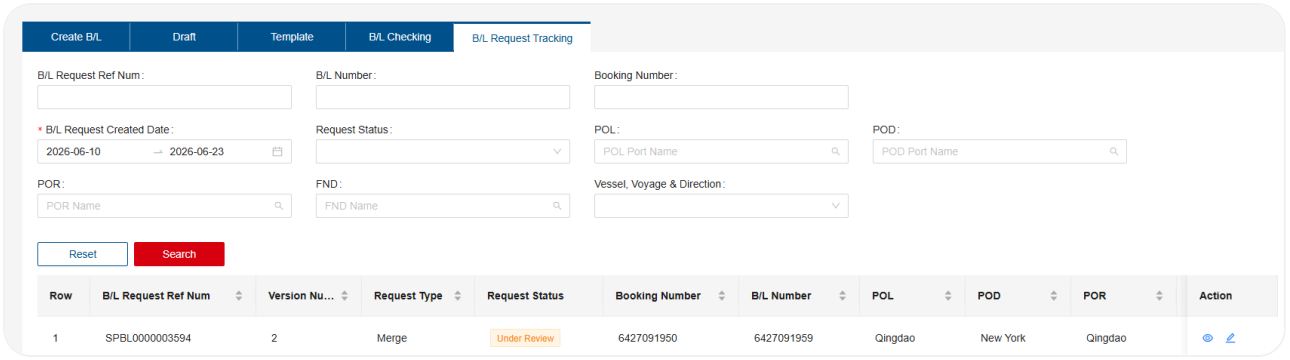




Merge B/L - Submit Request

- After completing the merge, the user can submit the merge request, then wait for the documentation team to process it.

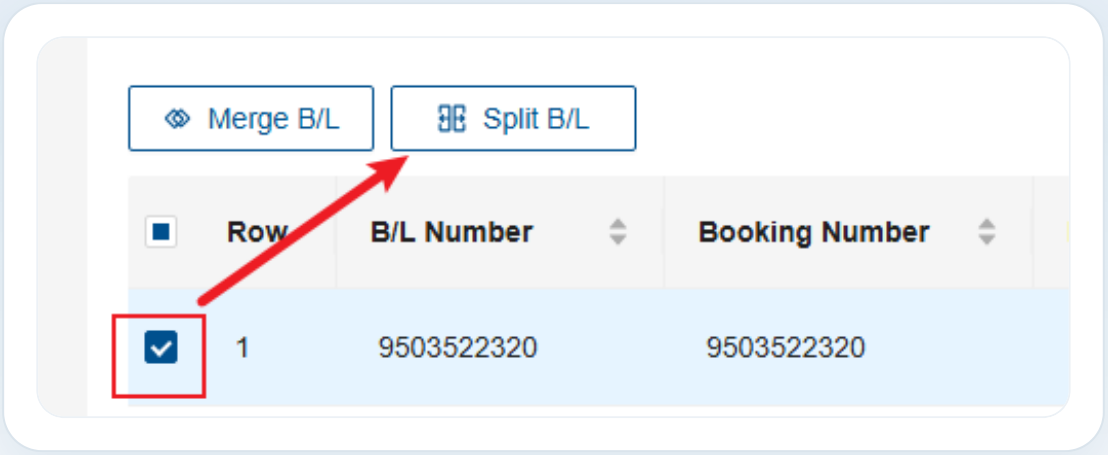
- The processing progress can be queried in the B/L Request Tracking Tab.


Create B/L
Draft
Template
B/L Checking
B/L Request Tracking
B/L Request Ref Num:
B/L Number:
Booking Number:
* B/L Request Created Date:
2026-06-10
2026-06-23
Request Status:
POL:
POL Port Name
POD:
POD Port Name
POR:
POR Name
FND:
FND Name
Vessel, Voyage & Direction:
Reset
Search
Row
B/L Request Ref Num
Version Nu...
Request Type
Request Status
Booking Number
B/L Number
POL
POD
POR
Action
1
SPBL0000003594
2
Merge
Under Review
6427091950
6427091959
Qingdao
New York
Qingdao

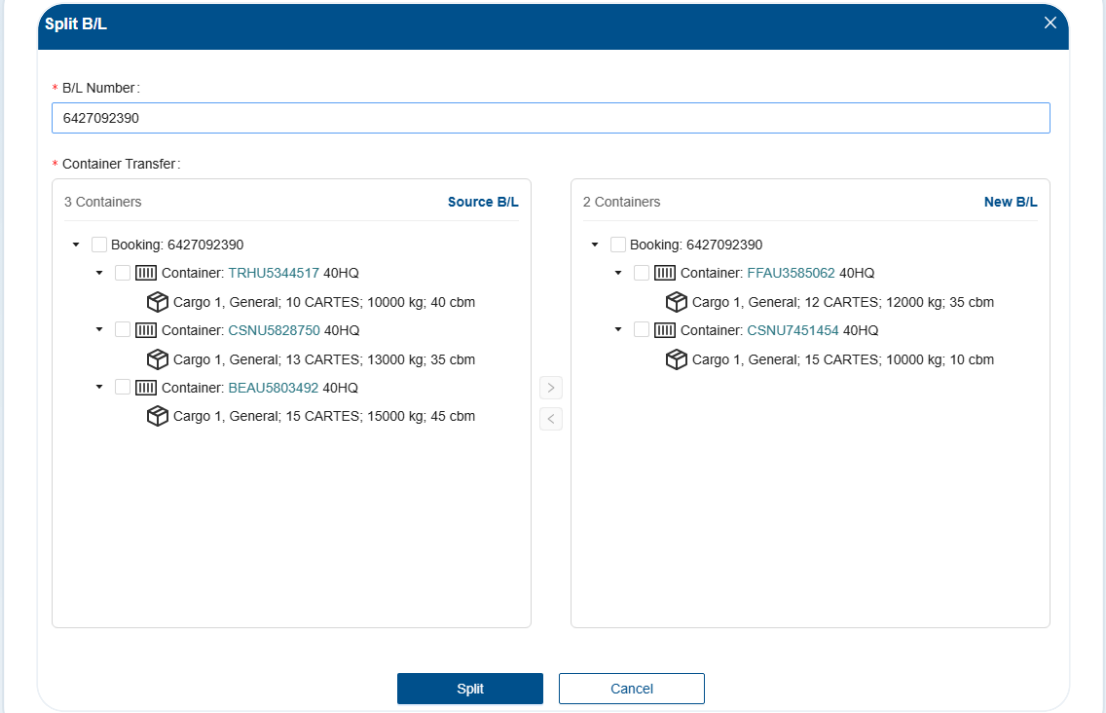
Split B/L

- The user can select a B/L to split, provided that the B/L contains two or more containers.

- The user can search for the target B/L under the B/L Checking Tab, select the B/L, and click Split B/L to open the Split B/L window.



- The user can select the target containers from the Source B/L on the left and assign them to the New B/L.

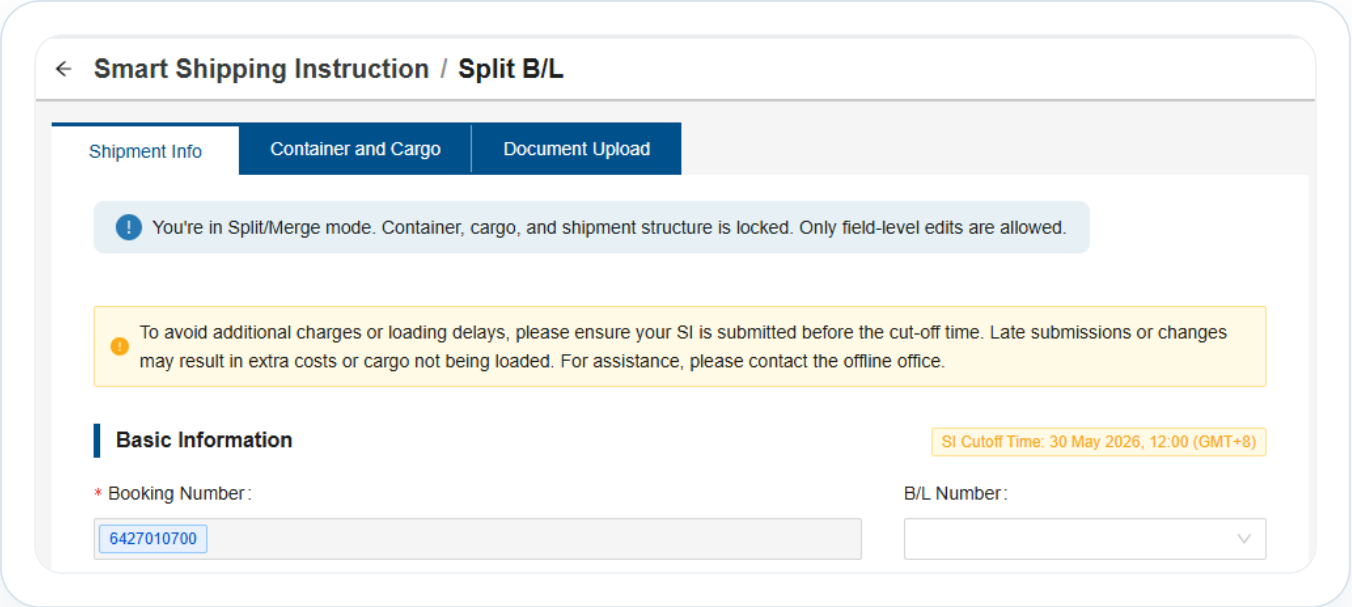


- After completing the assignment, click Split. The system will open the B/L Creation Page, and the user can continue to supplement other information.

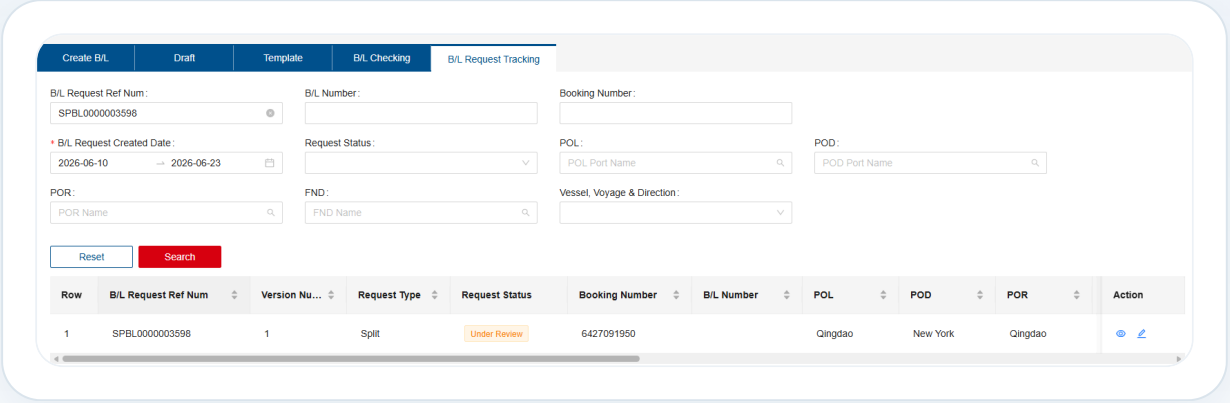
Split B/L - Open B/L Creation Page

- When opening the Split B/L page, the system does not allow the user to continue adding or deleting bookings, containers, and cargo information. The user is only allowed to edit the values of their attributes.

- The user can continue to fill in the information of other fields.



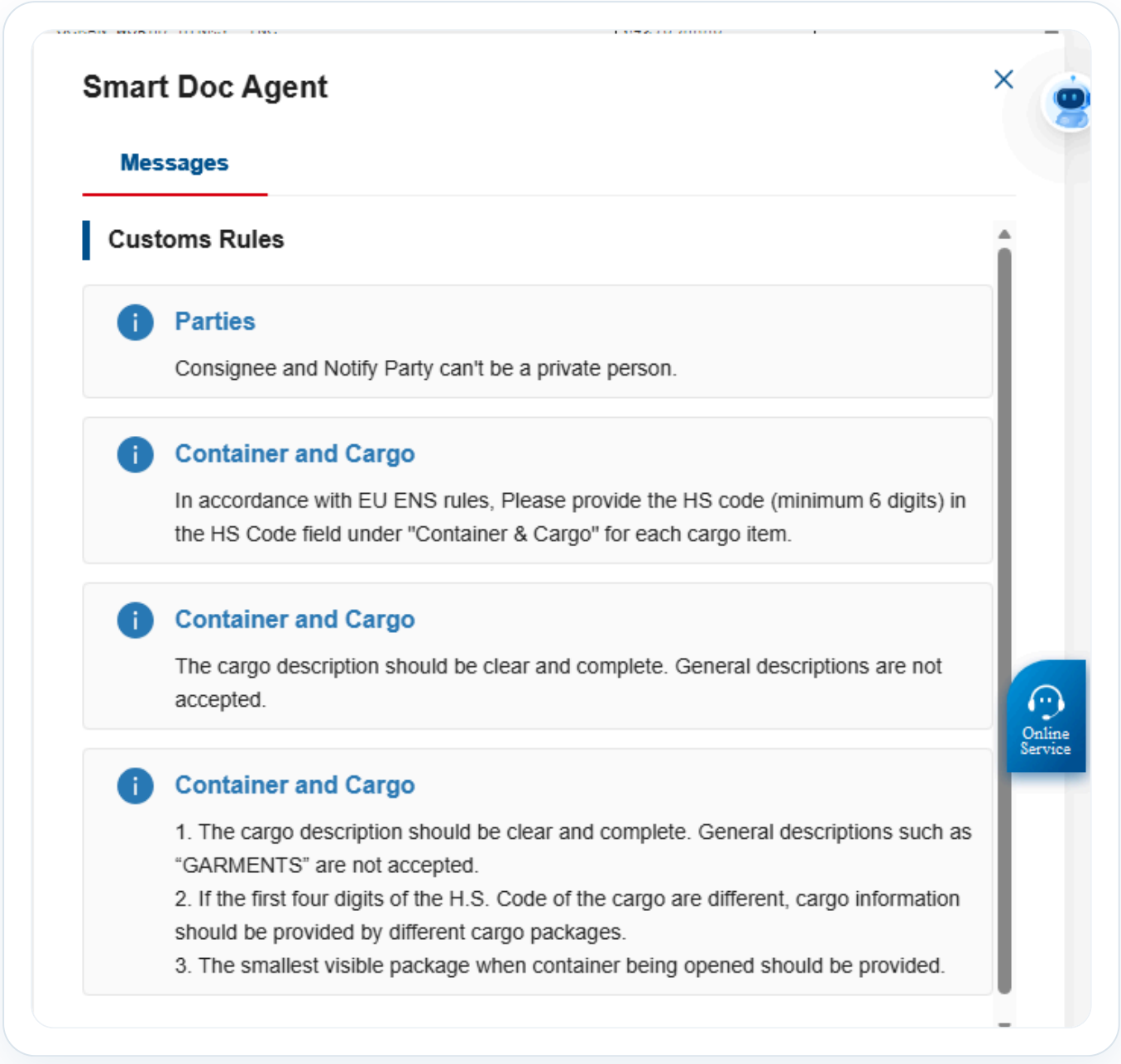
Split B/L - Submit Request

- After completing the split, the user can submit the split request, then wait for the documentation team to process it.
- The processing progress can be queried in the B/L Request Tracking Tab.
- 

Smart Doc Agent

Smart Doc Agent - Display Customs Rules

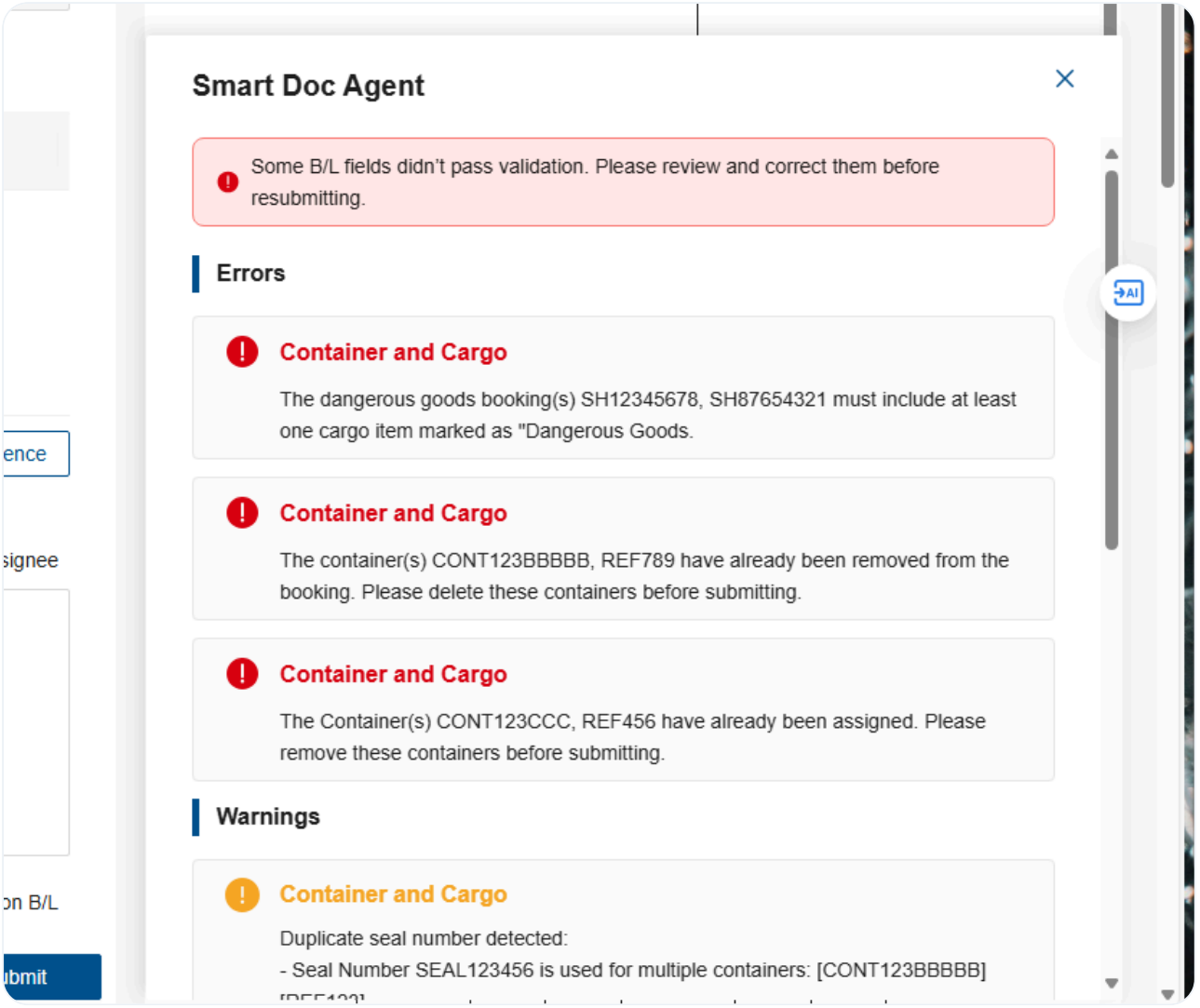
- When the user opens the B/L Creation/Edit Page, the system checks whether there are matching customs rules based on the current booking and B/L data. If there are, it opens the Smart Doc Agent side panel and displays it under the Message Tab.



Smart Doc Agent - Validation on Submit

- The system will display the current B/L's error messages, warning messages, and matched customs compliance rules within the Smart Doc Agent.

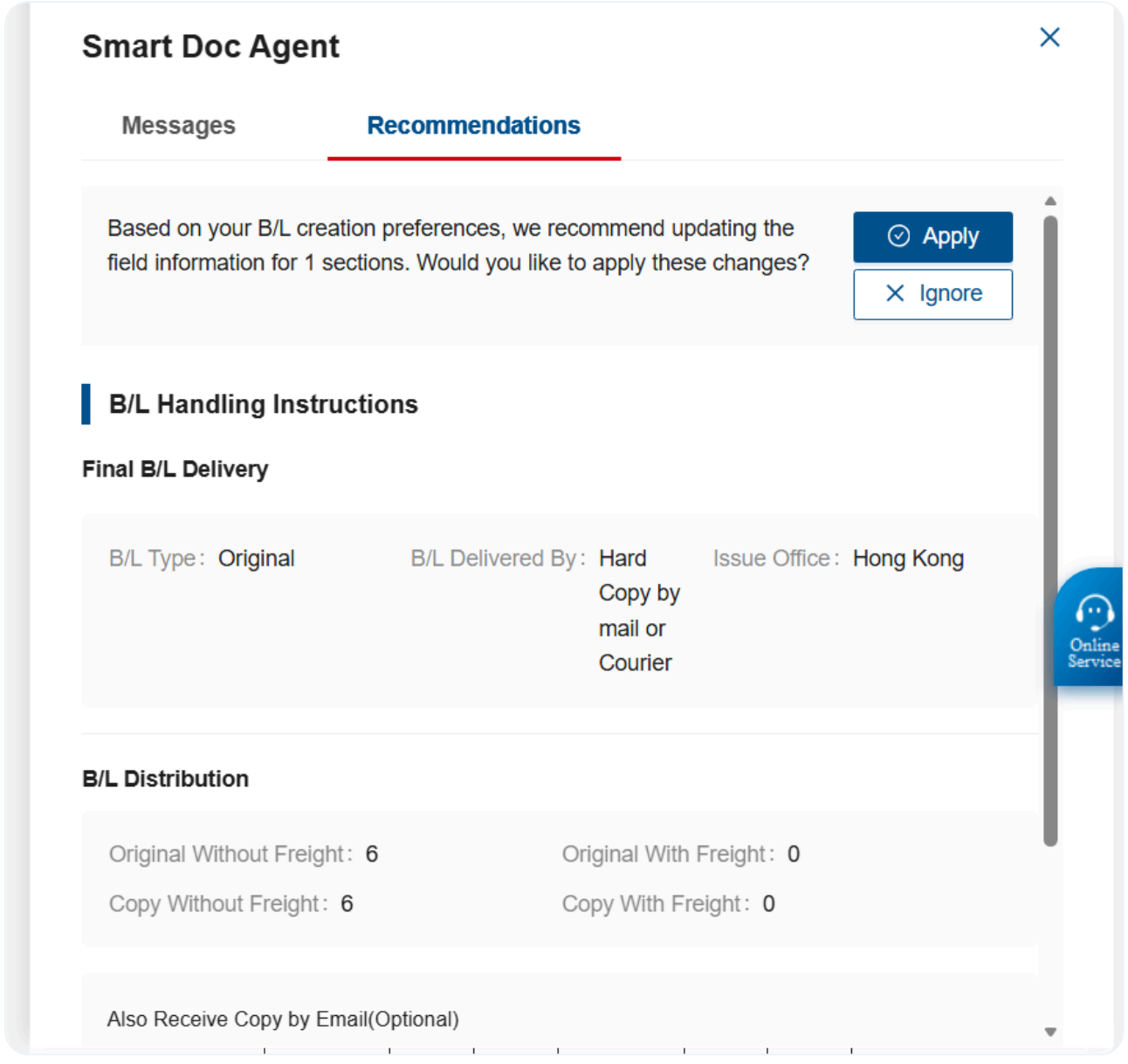
- The Smart Doc Agent is located on the right side of the Create B/L/Edit B/L page. When submitted, if the current B/L contains any of errors, warning messages, the system will expand it by default, and the user can also manually collapse it.



Smart Doc Agent - Customer Preference Result Recommendation

- When the user modifies the display text of the Party field, the system will re-check the current customer preferences based on information such as Party. If a new customer preference is detected, the system will automatically open the **Recommendations** Tab of the Smart Doc Agent side panel to display the recommendation result.

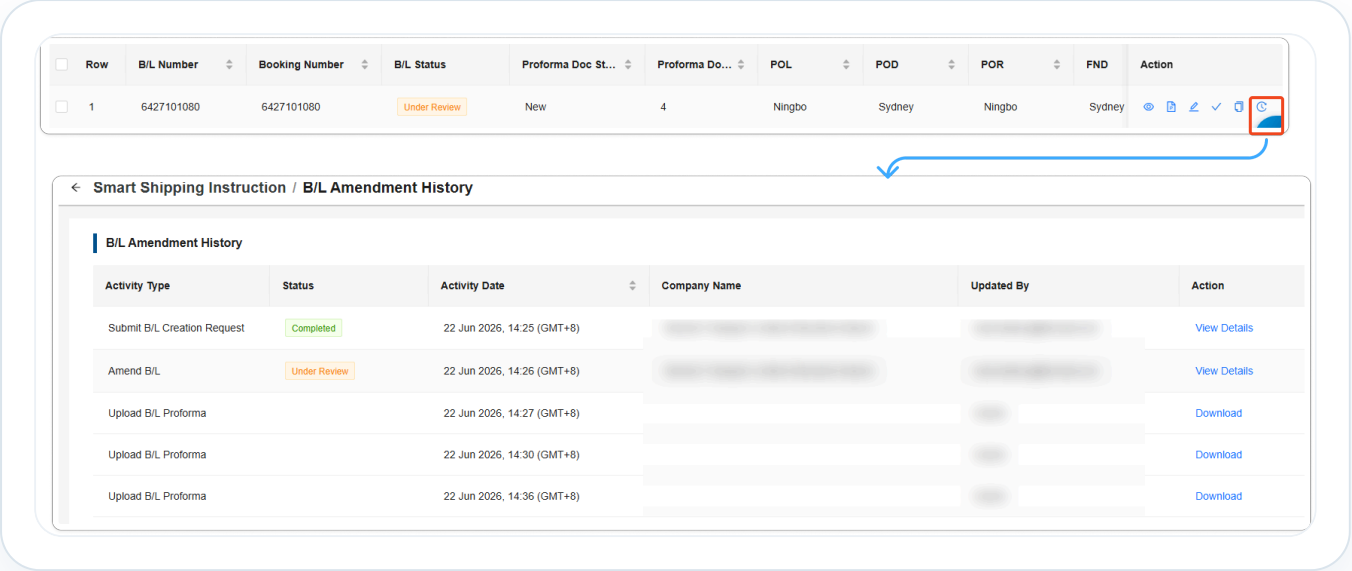
- After the user selects Apply, the system will apply the recommended values to the related fields in the form.
  - After the user selects Ignore, the system closes the recommendation.



B/L Amendment History

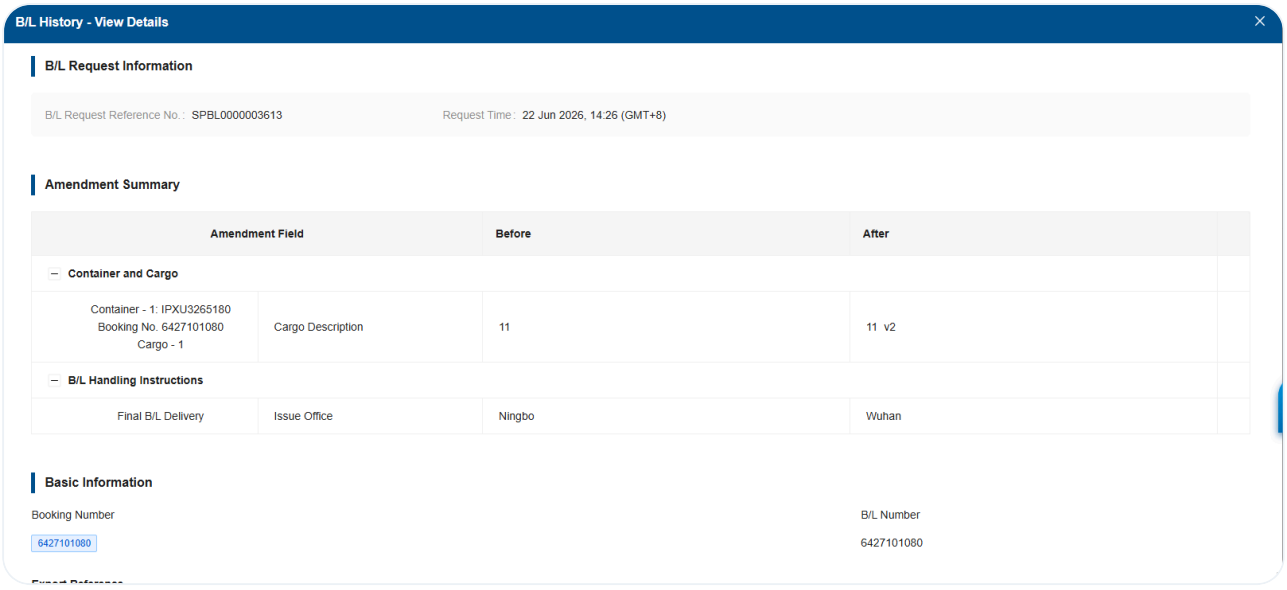
B/L History Entry

The user can enter search criteria in the B/L Checking Tab, search for related B/Ls, then click the History icon. After clicking, the system will automatically jump to the history record page of the B/L.



B/L History Details

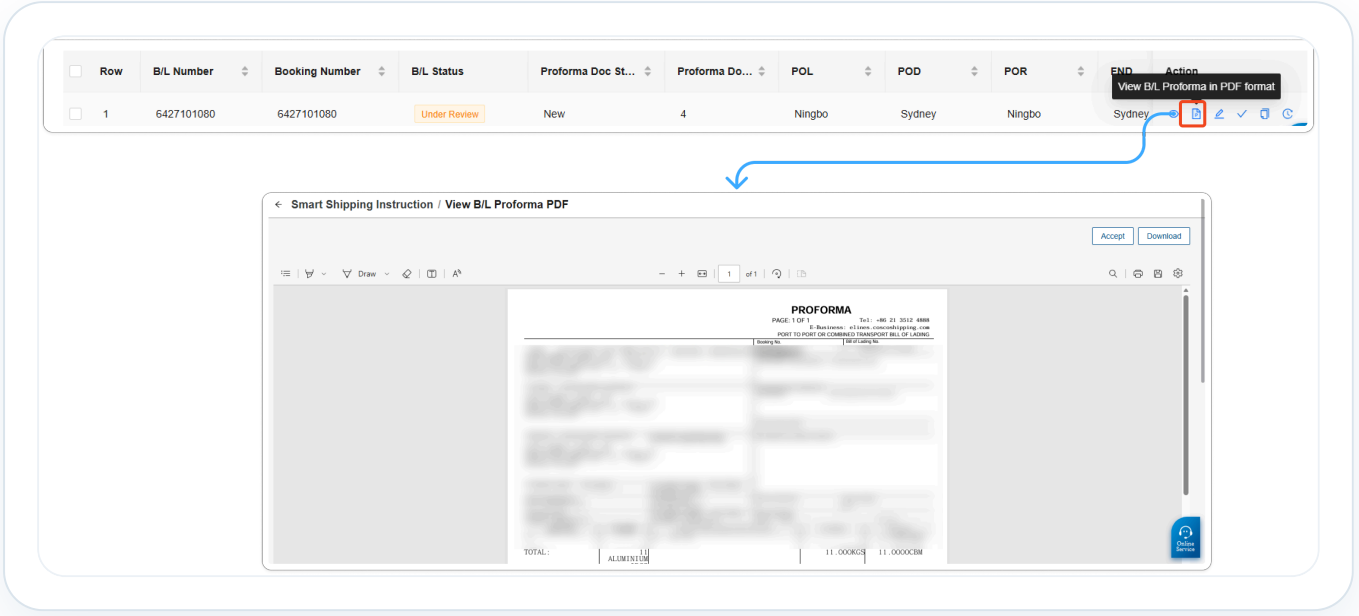
The user can click **View Details** in the action of the target record in the B/L Amendment History to view the details of a B/L Request, and can browse the amendment comparison to view the comparison with the previous version.


B/L History - View Details
B/L Request Information
B/L Request Reference No.: SPBL0000003613
Request Time: 22 Jun 2026, 14:26 (GMT+8)
Amendment Summary
Amendment Field
Before
After
Container and Cargo
Container - 1: IPXU3265180
Booking No. 6427101080
Cargo - 1
Cargo Description
11
11 v2
B/L Handling Instructions
Final B/L Delivery
Issue Office
Ningbo
Wuhan
Basic Information
Booking Number
6427101080
B/L Number
6427101080

B/L Proforma

View B/L Proforma Entry

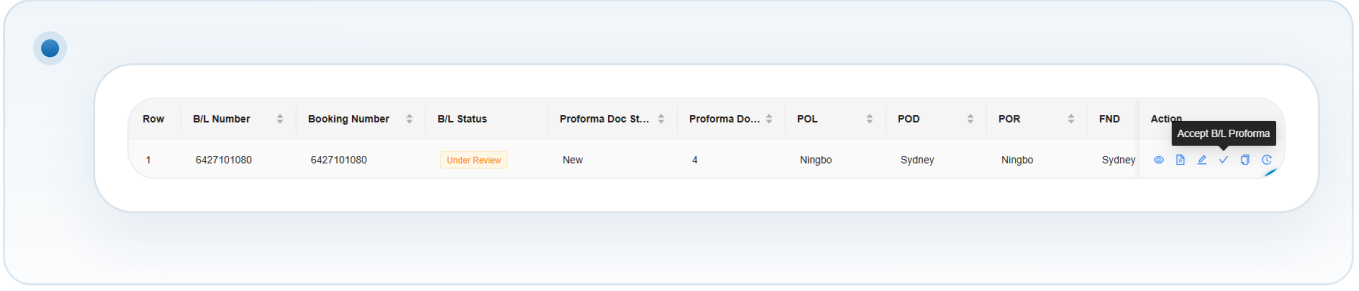
The user can enter search criteria in the B/L Checking Tab, and search for related B/Ls. When the status of the target B/L is Proforma Ready, the View B/L Proforma in PDF Format icon will be displayed in its action column. After clicking, the user can open the details page to view the B/L Proforma PDF.



Accept B/L Proforma Entry

The user can accept the B/L Proforma through the following ways:

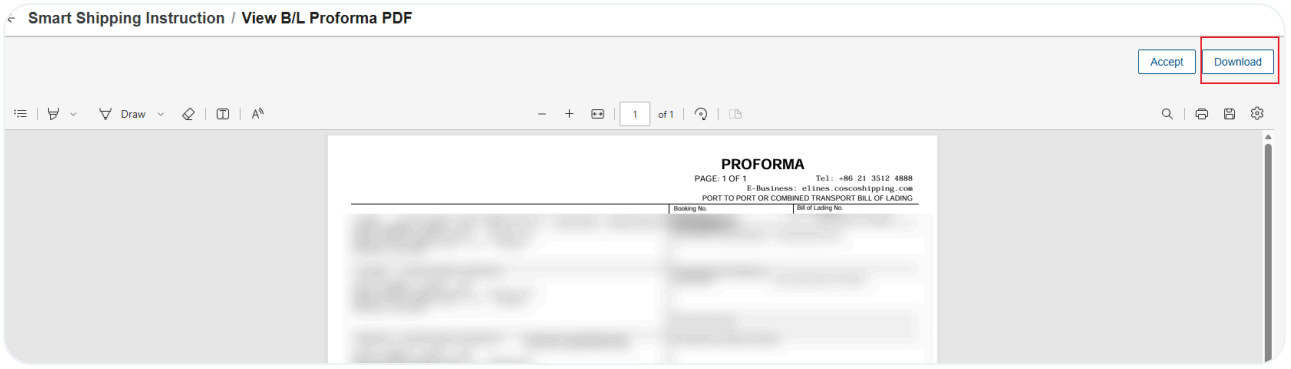
1. If the B/L Proforma of the latest version of the current target B/L has not been accepted, the system will display the Accept B/L Proforma icon.



2. The user opens the details page for viewing the B/L Proforma PDF, and the user can accept it by clicking the Accept B/L Proforma button. If the B/L Proforma has already been accepted, the button is not visible.

Download B/L Proforma

The user can print and download the B/L Proforma PDF document through the following ways.

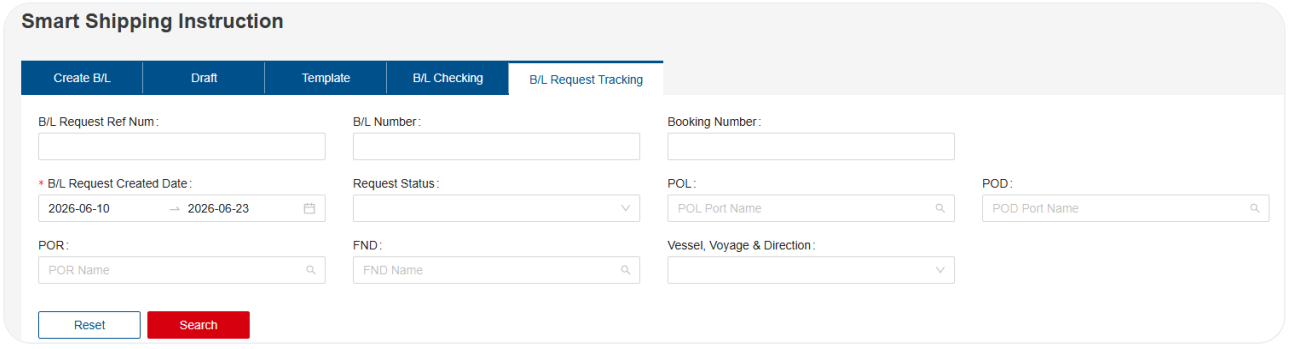


B/L Request

View B/L Request

If the user wants to view the processing status of a submitted B/L Request, they can open the B/L Request Tracking Tab to view it.

- The system restricts users to access only data within the most recent 6 months.



View B/L Request - Search Criteria

The user can query B/L Requests based on the following criteria to understand the processing status of the B/L Request.

- B/L Request Reference Number. After the user submits a B/L Request, the system will assign a unique identification number to this B/L Request. The user can use it to search.
- B/L Number. After the user submits a B/L Creation Request, the system will pre-allocate a B/L Number. The user can use this number to search for B/L records.
- Booking Number. The Booking Number entered by the user when submitting the B/L Creation Request and Amendment Request.
- Request Creation Date. The submission time of the B/L Request. Supports a span of up to half a year.

- Request Status. Currently, four statuses are available: Under Review, Completed, Ignored, Rejected.
- Port of Loading. The user can enter the port name, and the system will automatically suggest it. The user can select an option.
- Port of Discharge. The user can enter the port name, and the system will automatically suggest it. The user can select an option.
- Place of Receipt. The user can enter the place name, and the system will automatically suggest it. The user can select an option.
- Final Destination. The user can enter the place name, and the system will automatically suggest it. The user can select an option.
- Vessel, Voyage and Direction. The user can enter text and then select from the drop-down list.

View B/L Request - Operations

- The user can perform the following operations in the search results table:
- Select any historically submitted B/L Request, and by clicking the View B/L Request icon, browse the B/L Request information.
- If the target B/L Request is **not in** the status of **Completed, Ignored, or Rejected,** the user can click the Edit icon to submit a new B/L Amendment Request based on the version of the current B/L Request.

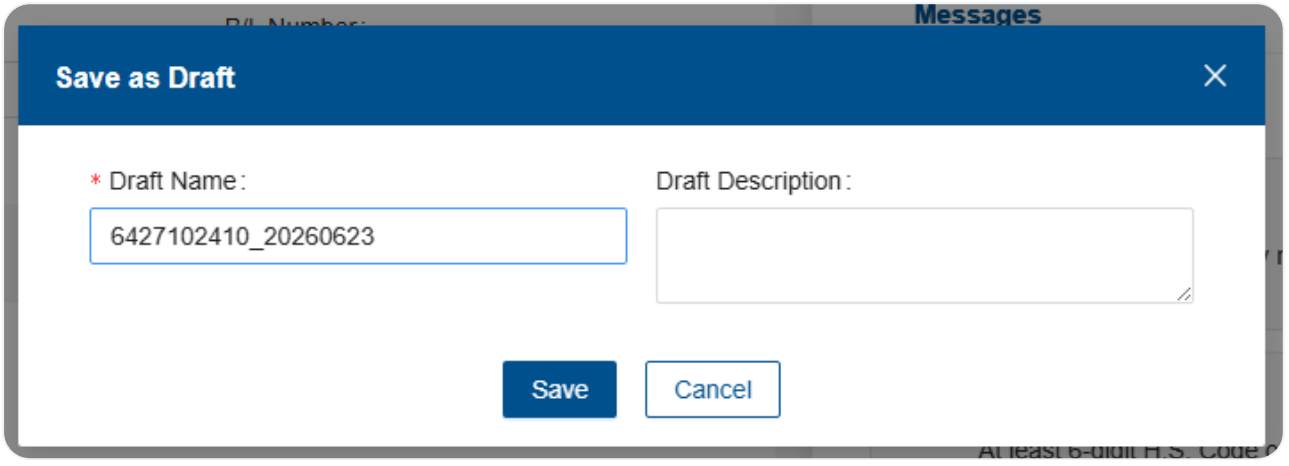
Row	B/L Request Ref Num	Version Nu...	Request Type	Request Status	Booking Number	B/L Number	POL	POD	POR	Action
1	SPBL0000003635	1	Create	Under Review	6427102410	6427102410	Qingdao	New York	Qingdao	
2	SPBL0000003634	1	Create	Under Review	6427102550	6427102559	Singapore	Istanbul	Singapore	

B/L Draft

Create B/L Draft

- When creating a B/L, the user can temporarily save the information already filled in the form.
  - Save by clicking the Save as Draft button at the bottom of the page. After clicking, the system will open the Save as Draft window, displaying two input boxes: Draft Name and Draft Description.
    - The default value of the Draft Name is the Booking Number plus the current date.
    - The user can modify the system-default Draft Name and can also fill in the Draft Description.
    - After completion, click Save.

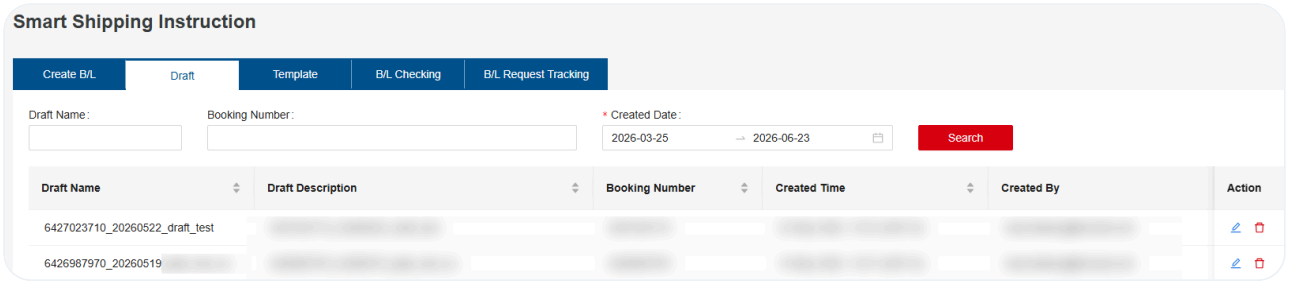
- When Editing a B/L, the **Save as Draft** button is not available.



Query and Use B/L Draft

- To find a previously created B/L Draft, the user can directly click the Search button under the **Draft** Tab on the Smart Shipping Instruction home page, or enter the Draft Name and Booking Number to search for the B/L Drafts they created.

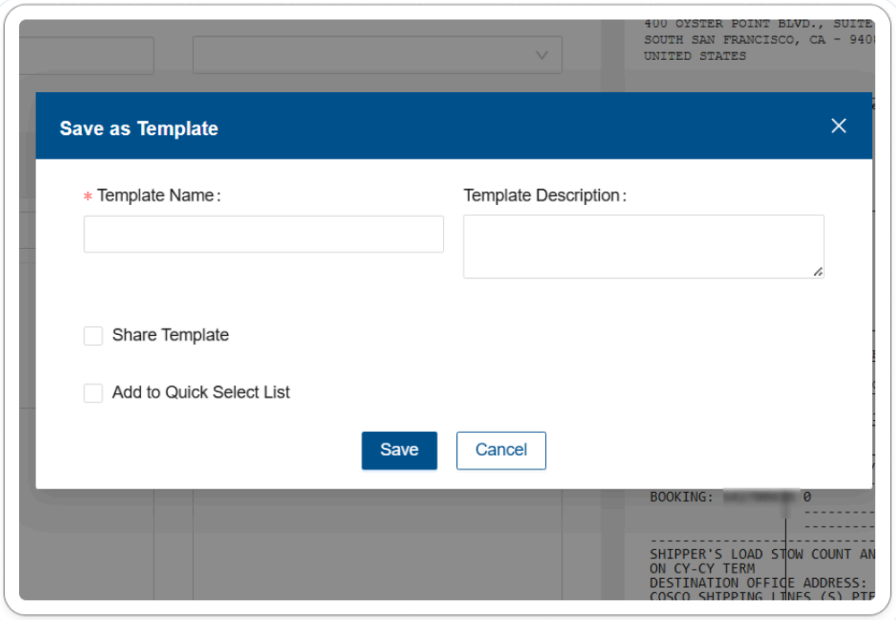
- In the action column of the search results table, the user can click:
  - Edit button. Loads the B/L Creation Page with the information filled in the draft, and the user can continue to supplement other information to create a B/L.
    - After completing the B/L creation through the draft, the related draft will be automatically deleted.
    - Delete button. Deletes the useless draft.



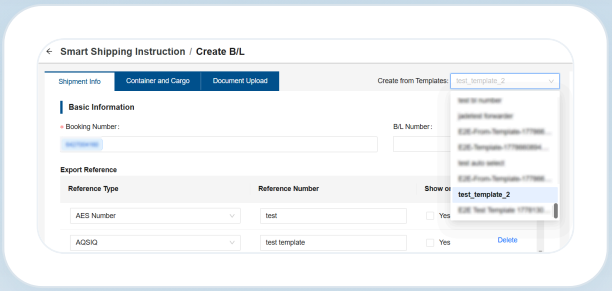
B/L Template

Create B/L Template - Method 1

- When creating a B/L, the user can save frequently used B/L creation information as a template.
  - Save by clicking the **Save as Template** button at the bottom of the page. After clicking, the system will open the Save as Template window, displaying two fields: Template Name (required) and Template Description, as well as two checkboxes. See the figure below.



  - Share Template. When checked, it is visible to other users in the company of the current account.
    - Add to Quick Select List. When the B/L Creation Page is opened, this template is visible in the Create from Templates drop-down list. See the figure below.

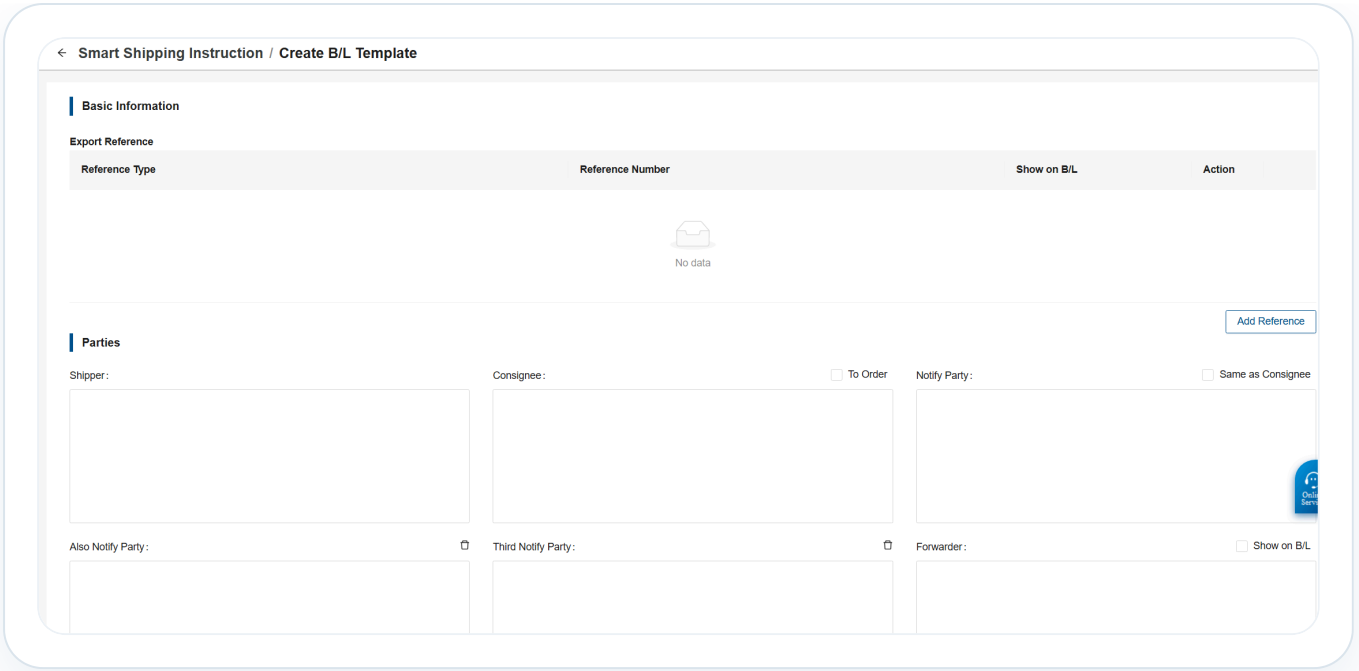


- After completion, click Save.
  - The B/L Template can save Export Reference, Party, and B/L Handling Instructions information.

Create B/L Template - Method 2

- The user can click the **Add Template** button under the **Template** Tab on the Smart Shipping Instruction home page to open the **Create B/L Template** page.

- The user can fill in the related template information on the page, then click the Save button.



Maintain and Use B/L Template 1

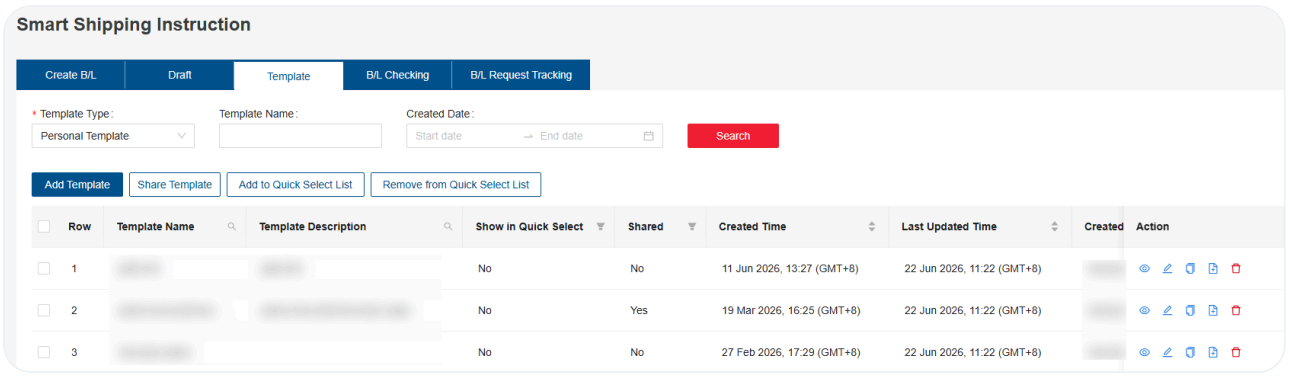
- The user can select the template type, and enter the template name and date to search for B/L Templates. The user can only search for templates they created and templates shared by other users in the company.

- Template Type
  - Personal Template. Only available to the user.
    - Company Shared Template. Can be searched and used by all users under the company of the current account.

- Operations
  - View Template. View template details.
    - Edit Template. Edit template information. Only templates created by the user can be edited.
    - Copy to Create Template. You can select a template created by

others, copy and create it as your own template.

- Create B/L from Template. Opens the B/L Creation Page based on the information of this template, and pre-fills the form on the B/L Creation Page according to the template information.
- Delete. Delete the template.



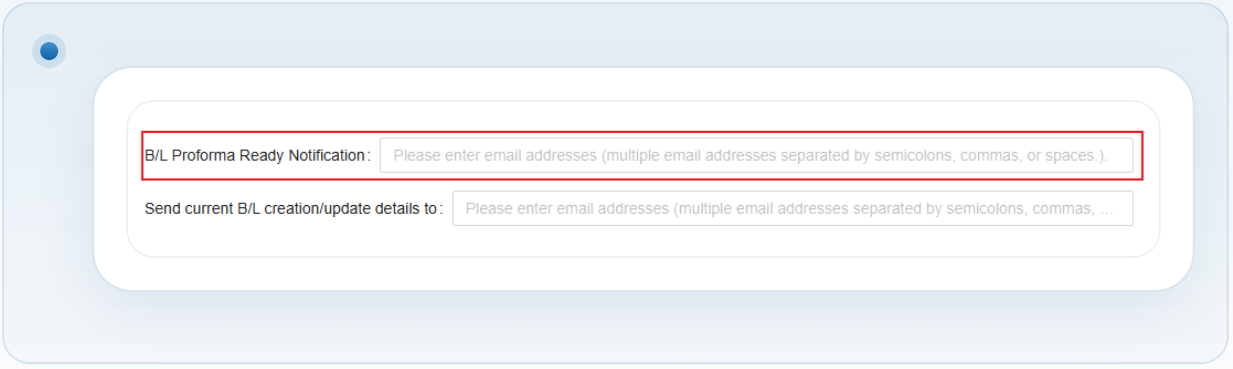
Maintain and Use B/L Template 2

- Action buttons
  - Add Template. Opens the template creation page.
    - Share Template. Shares the template created by the user with other users in the company.
    - Add to Quick Select List. Configures the target template to be directly selectable in **Create from Templates** on the B/L Creation Page.
    - Remove from Quick Select List. Removes the target template from the **Create from Templates** drop-down list on the B/L Creation Page.

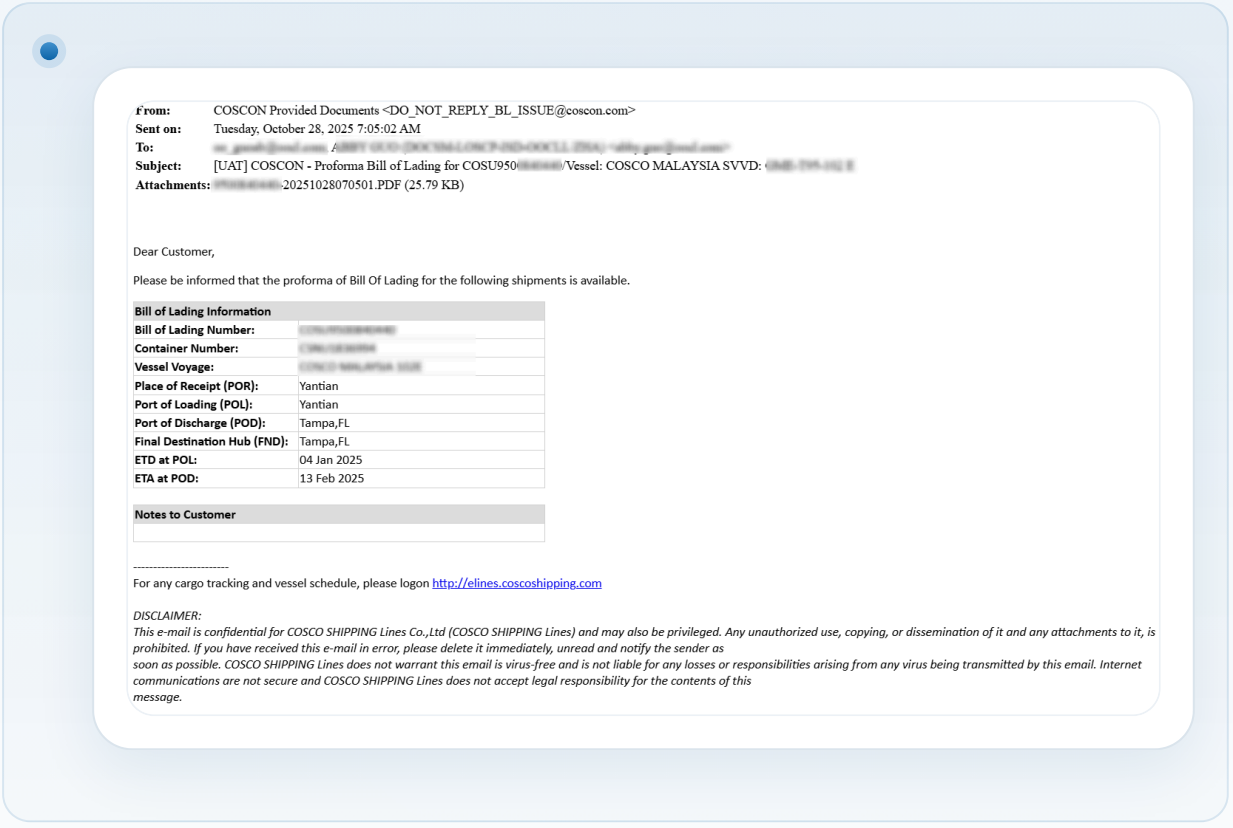
Email Notification

Create B/L - B/L Handling Instructions - B/L Proforma Email

- The user can fill in the email address for notification when the B/L Proforma is completed.



- If the user fills in an email address, when the B/L Proforma is completed, the system will automatically send the B/L Proforma PDF file to the specified email address via email. The email content is referenced below.



From: COSCON Provided Documents <DO_NOT_REPLY_BL_ISSUE@coscon.com>
Sent on: Tuesday, October 28, 2025 7:05:02 AM
To:
Subject: [UAT] COSCON - Proforma Bill of Lading for COSU950[redacted]/Vessel: COSCO MALAYSIA SVVD: [redacted]
Attachments: [redacted]-20251028070501.PDF (25.79 KB)

Dear Customer,

Please be informed that the proforma of Bill Of Lading for the following shipments is available.

Bill of Lading Information	
Bill of Lading Number:	[redacted]
Container Number:	[redacted]
Vessel Voyage:	[redacted]
Place of Receipt (POR):	Yantian
Port of Loading (POL):	Yantian
Port of Discharge (POD):	Tampa,FL
Final Destination Hub (FND):	Tampa,FL
ETD at POL:	04 Jan 2025
ETA at POD:	13 Feb 2025

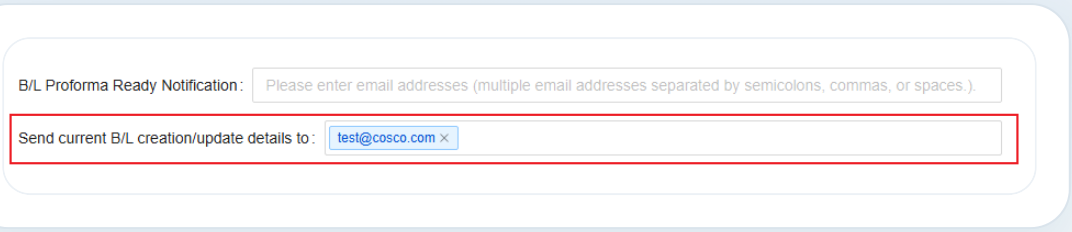
Notes to Customer

For any cargo tracking and vessel schedule, please logon http://elines.coscoshipping.com

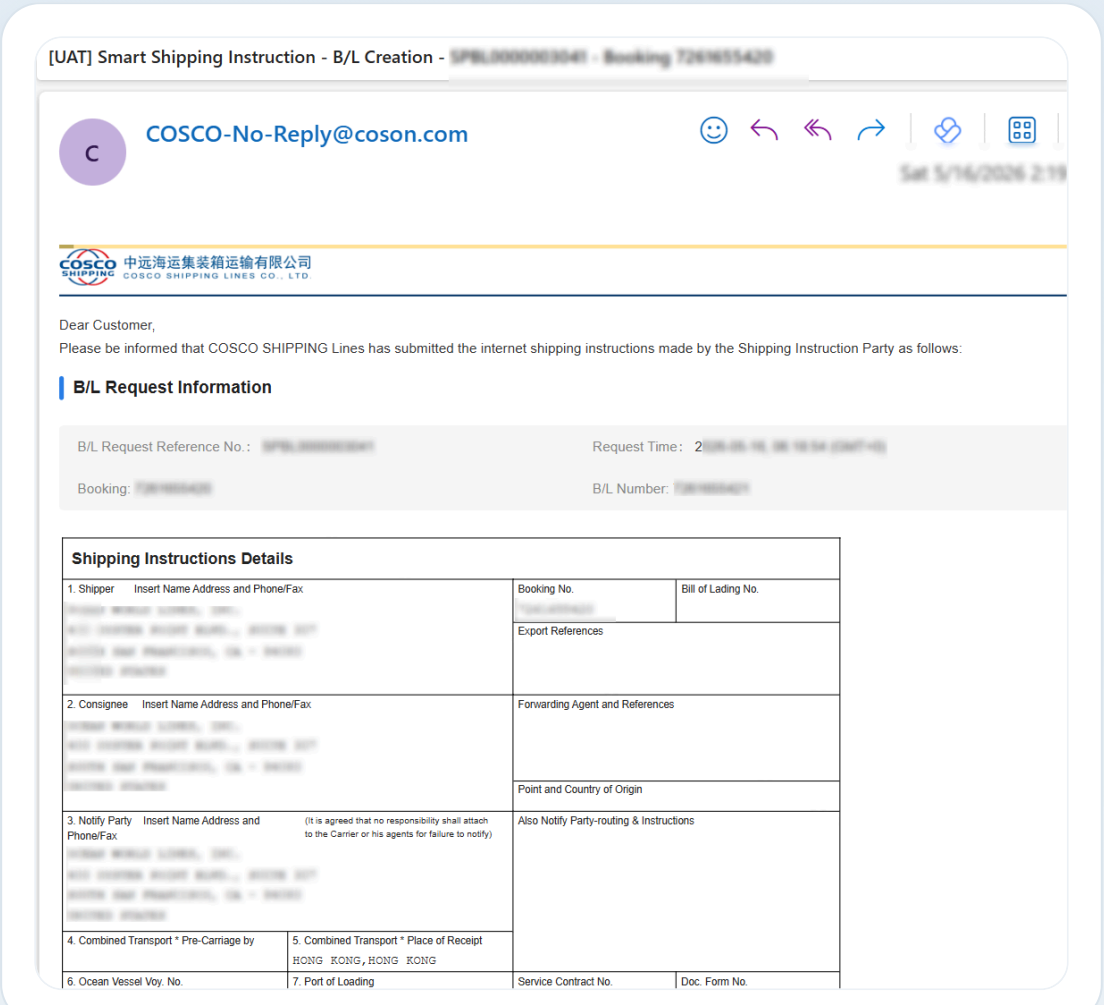
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Create B/L - B/L Handling Instructions - Email Sending B/L Request Information

- The user can fill in the email address to receive the current B/L Request information.



- If the user fills in an email address, after the user successfully submits, the system will automatically send the current B/L Request information to the specified email address via email.



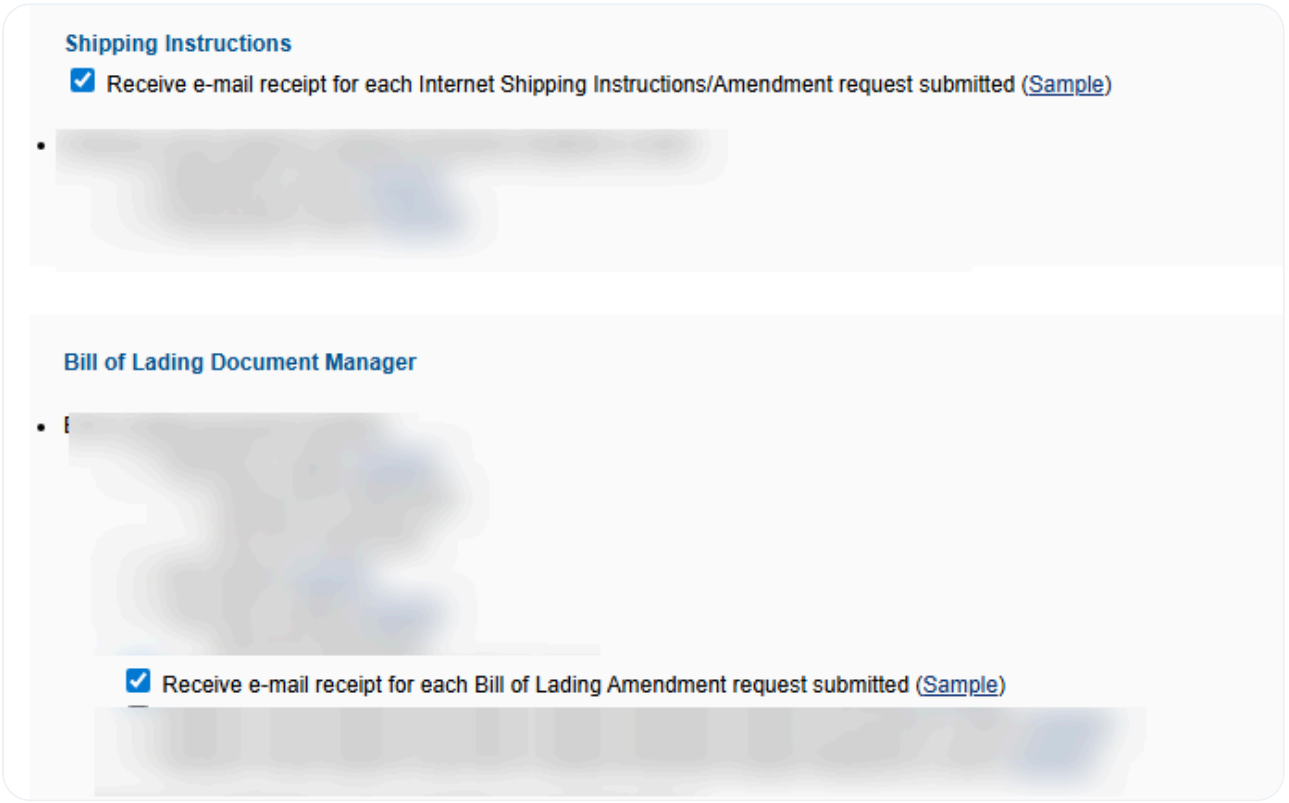
Email Subscription - Sending of B/L Creation Request / B/L Amendment Request

The **Smart Shipping Instruction** platform no longer distinguishes between **SI Amendment and B/L Amendment**. In **Smart Shipping Instruction**, the amendments submitted by users are uniformly regarded as B/L Amendment Request, therefore:

If the user subscribes to any of the following email notification types, when the user completes a **B/L Creation or B/L Amendment** request submission, the system will automatically send the B/L Request information to the email address bound to the user's account via email.

- Receive e-mail receipt for each Internet Shipping Instructions/Amendment request submitted

- Receive e-mail receipt for each Bill of Lading Amendment request submitted

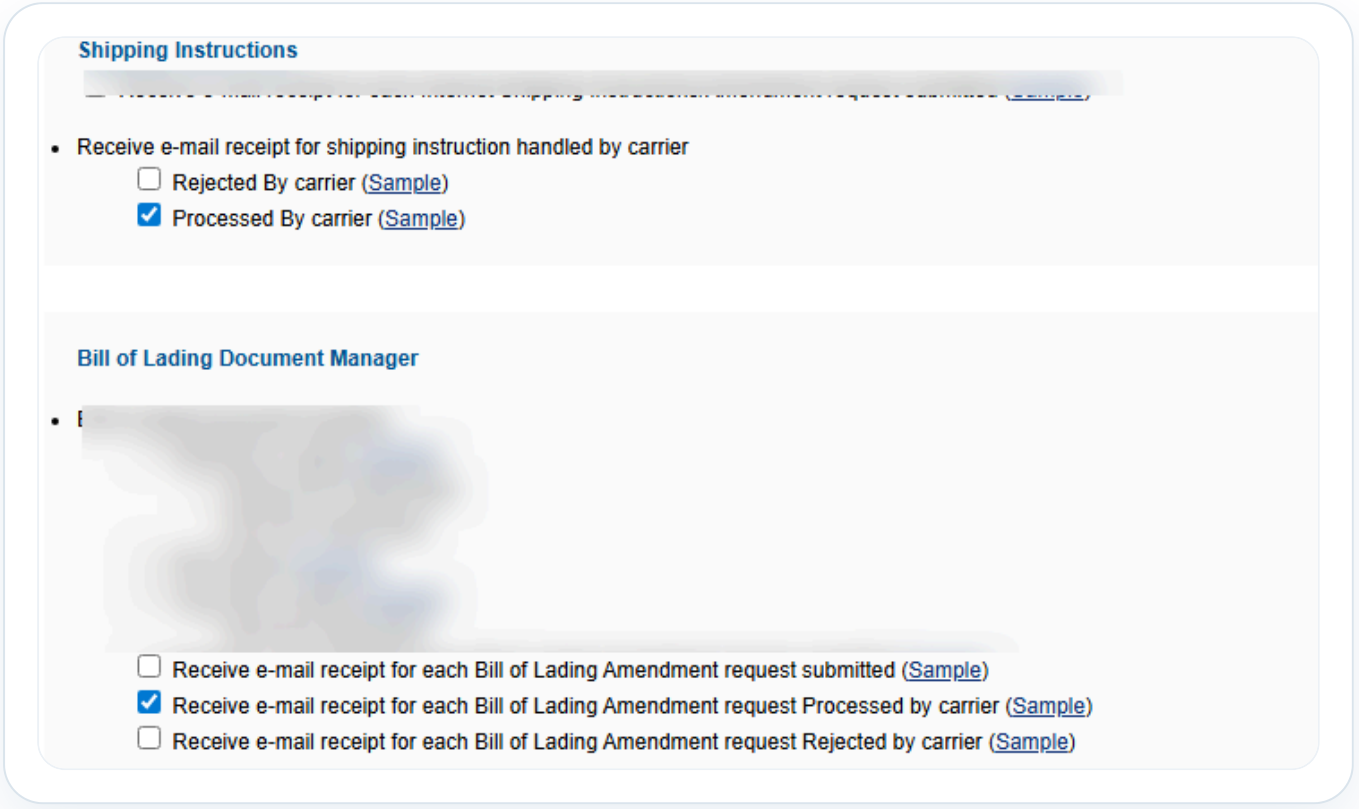


Email Subscription - Sending Status Email When B/L Request Is Processed

If the user subscribes to any of the following email notification types, when the **B/L Creation or B/L Amendment** request submitted by the user is processed by the internal documentation system, the system will automatically send the B/L Request information to the email address bound to the user's account via email.

- Processed By carrier

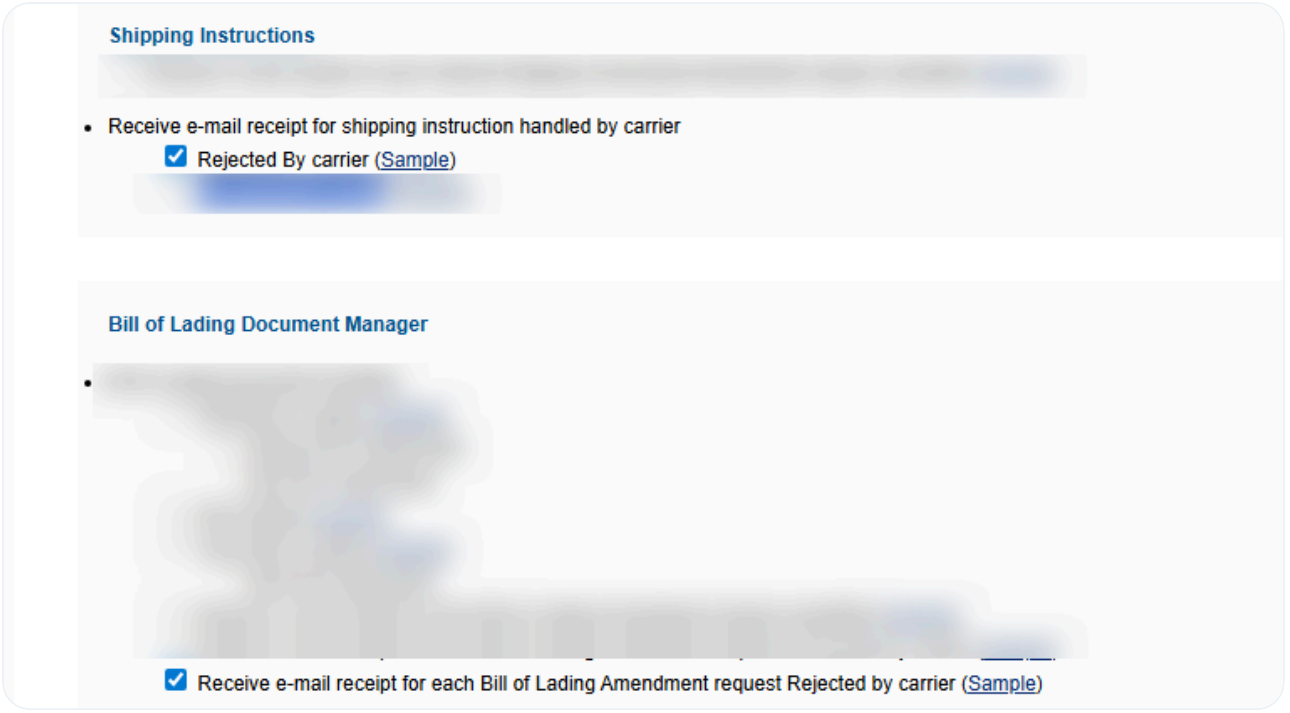
- Receive e-mail receipt for each Bill of Lading Amendment request Processed by carrier



Email Subscription - Sending Status Email When B/L Request Is Rejected

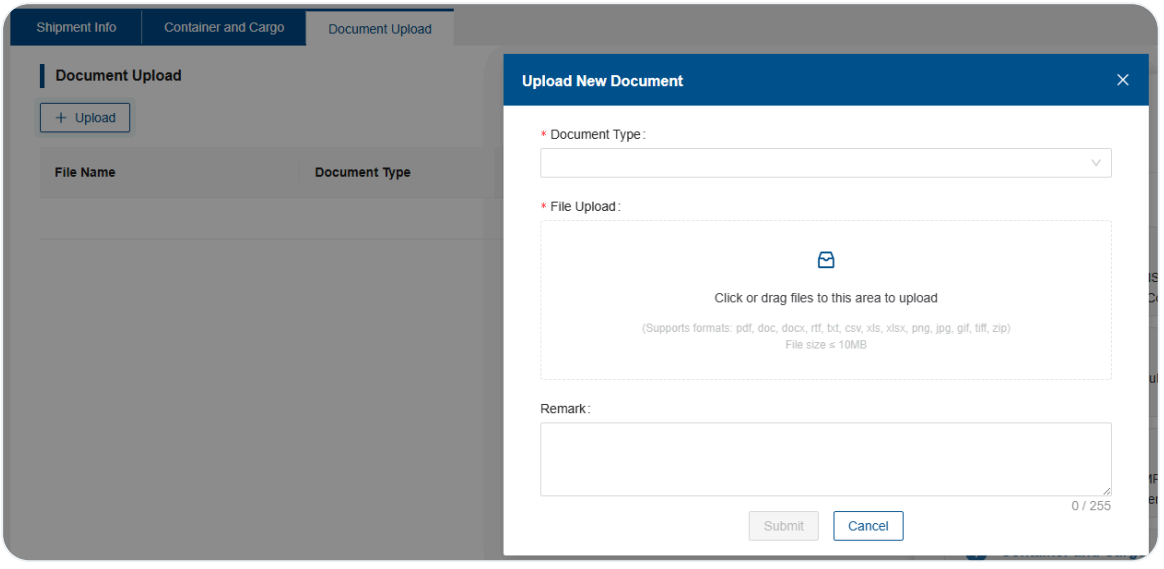
If the user subscribes to any of the following email notification types, when the **B/L Creation or B/L Amendment** request submitted by the user is rejected by the internal documentation system, the system will automatically send the B/L Request information to the email address bound to the user's account via email.

- Rejected by carrier
- Receive e-mail receipt for each Bill of Lading Amendment request Rejected by carrier



Upload Document

- After the user opens the B/L Creation/Edit Page, they can click the Upload button to open the file upload window to upload files.
  - The user can upload multiple files at once.
    - Supported document types are: AES (for US laden cargo), Shipper Certificate, Letter of Indemnity (LOI), Shipping Instruction/BL Master, House BL.
    - Supported file formats are: pdf, doc, docx, rtf, txt, csv, xls, xlsx, png, jpg, gif, tiff, zip.
    - Uploaded files can be downloaded and deleted.



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