



Amber Road
POWERING GLOBAL TRADE

Quick Create Screening Process

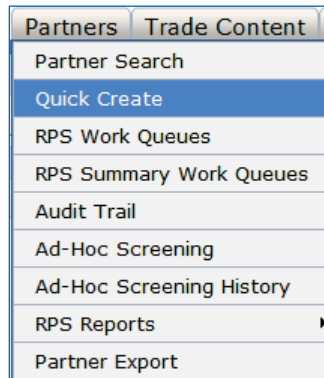
Export On-Demand

December 2017

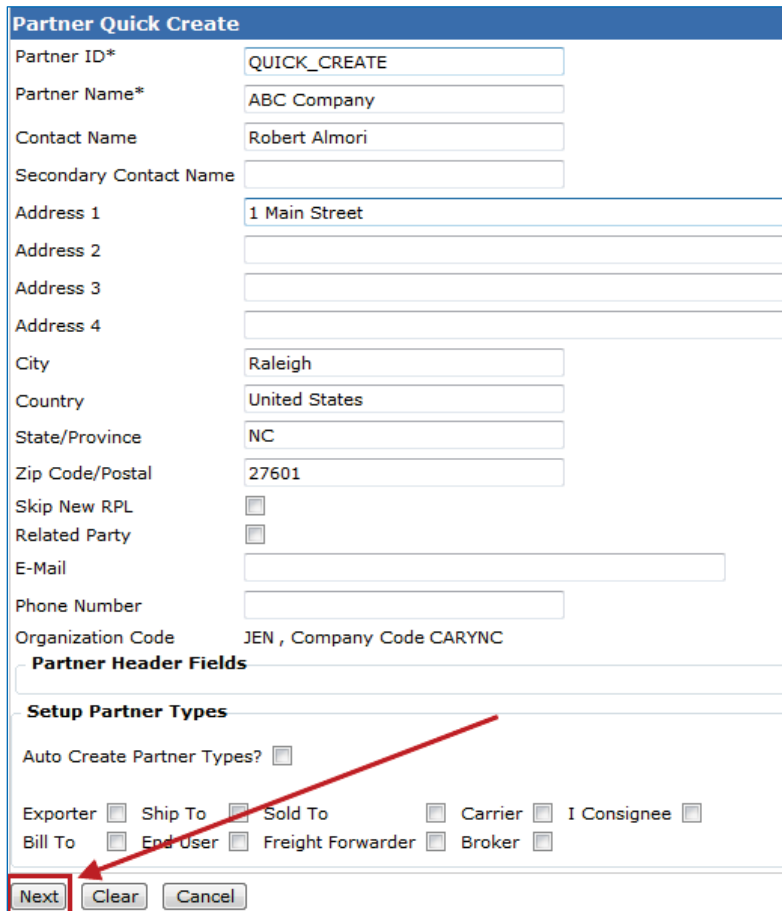
Quick Create Screening Process

Perform the steps outlined below to utilize the Quick Create Screening functionality.

Go to **Partners > Quick Create** to enter the partner data.



Enter your partner information on the Quick Create Partner Screening page, shown below.



A screenshot of the 'Partner Quick Create' form. The form contains the following fields and options:

- Partner ID*: QUICK_CREATE
- Partner Name*: ABC Company
- Contact Name: Robert Almori
- Secondary Contact Name: (empty)
- Address 1: 1 Main Street
- Address 2: (empty)
- Address 3: (empty)
- Address 4: (empty)
- City: Raleigh
- Country: United States
- State/Province: NC
- Zip Code/Postal: 27601
- Skip New RPL:
- Related Party:
- E-Mail: (empty)
- Phone Number: (empty)
- Organization Code: JEN, Company Code CARYNC
- Partner Header Fields**
- Setup Partner Types**
- Auto Create Partner Types?
- Exporter Ship To Sold To Carrier I Consignee
- Bill To End User Freight Forwarder Broker

At the bottom of the form, there are three buttons: 'Next', 'Clear', and 'Cancel'. The 'Next' button is highlighted with a red box, and a red arrow points to it from the right side of the form.

When entering the partner data, please keep the following tips in mind:

- The **Partner ID** and **Partner Name** fields are required. The Partner ID value will be automatically generated by the system. You can overwrite it, but it must remain unique for the organization under which the partner record will be stored.
- The **Partner Name**, **Contact Name** and **Secondary Contact Name** fields are screened separately against the entity names on the selected Restricted Party Lists (RPLs). Therefore, you may receive a potential name match on any or all of the Partner / Contact names entered.
- All four of the address fields (**Address 1 – 4**) are concatenated and screened as a single string of text against the address strings on your selected RPLs.
- **City**, **State** and **Zip Code/Postal** are all optional fields that may be used to filter Potential Matches, based on your configuration settings. These settings will be determined by your company administrator(s).
- **Country** is an optional field that is screened against any selected Embargo / Sanctions lists. If you start typing the country name, the field will auto-populate with the correct country code and name stored in the system.
- **E-Mail** and **Phone Number** are optional fields that are not used in the screening process. They may be used to store your partner's contact information.
- If the **Skip New RPL** field is selected, Export On-Demand will refrain from submitting this partner for ongoing screening against our Restricted Party Lists.
- If the **Related Party** box is checked, this indicates the partner record is a party related to your organization. For example, the partner is another division or business unit within your company.
- The **Setup Partner Types** section is an additional option used in conjunction with Export On-Demand modules other than Restricted Party Screening. You may skip this section.


Once the applicable data is entered, click on the **Next** button at the bottom of the page to screen the partner.

Next, review the Partner Screening results page. If the status is marked as **Approved**, no further action is needed. If the status is marked as **Potential Match**, click on the **View Report** button to review the partner screening results in more detail.

For further instructions on how to review a Potential Match, please refer to the **Steps to Review Potential Matches in Export On-Demand** quick reference guide.

Partner Screening Results

[View Report](#) [New Partner](#) [Edit Partner](#)

| | | |
|------------------------|--|---|
| Status | Potential Match  | <div style="border: 1px solid black; padding: 5px;">Review the status to determine if further action is needed.</div> |
| Partner ID | QUICK_CREATE | |
| Partner Name | ABC Company | |
| Contact Name | Robert Almorì | |
| Secondary Contact Name | | |
| Address 1 | 1 Main Street | |
| Address 2 | | |
| Address 3 | | |
| Address 4 | | |
| City | Raleigh | |
| Country | United States | |
| State/Province | NC | |
| Zip Code/Postal | 27601 | |
| E-Mail | | |
| Phone Number | | |
| Organization Code | JEN, Company Code CARYNC | |