



# A GUIDE TO CARGOWISE DOCBUILDER AND CUSTOMIZED DOCUMENT CREATION

WHITE PAPER

---

WHITE PAPER PRESENTED BY  
**LOGIXBOARD**

A training tool for freight forwarders and freight brokers to utilize CargoWise DocBuilder's customizable formats for increased automation and productivity.



## Table of contents

Creating a Document	04
Custom Document Configurations and Sections	06
Section Types	09
Section Filters	10
Document Languages	11
Document Themes	11
Benefits of Utilizing DocBuilder	12

## Summary

The CargoWise One logistics execution platform has numerous modules to aid logistics professionals with the management of shipping goods globally. CargoWise DocBuilder was an addition to these modules that replaced their Legacy Documents in 2010, bringing users the ability to easily create and manage documents that are integral in handling shippers' and beneficial cargo owners' (BCO's) orders.

Instead of building out documents for shipments through external programs like Excel, DocBuilder allows users to build and customize their documents directly within CargoWise One. Users can access ready-to-use document templates, build customized **Document Configurations**, or start with templates then alter **Sections** to build the look and functionality desired. The customization features provided in this module also allow users to add automation to their document creation process with **macros** that pull key data from an order based on the conditions applied.

DocBuilder is an important element for CargoWise users because of the benefits it brings not only customers, but also the heightened efficiency and execution capabilities resulting from internal operations. Utilizing this module can help companies ensure that transparency and visibility around key information of an order are communicated accurately to all parties that touch the process – through necessary documentation.

The image displays four overlapping screenshots of the CargoWise DocBuilder interface, showcasing various shipping documents:

- Sea FCL Departure Agents Instruction:** A document with a header section containing metadata like 'SHIPMENT NO.', 'DATE OF ISSUE', and 'ISSUE DATE'. Below this is a detailed table with columns for 'SHIPMENT DETAILS', 'COMMENTS', and 'INSTRUCTIONS'. It includes sections for 'SHIPMENT INFO', 'SHIPMENT TYPE', 'SHIPMENT CLASS', and 'SHIPMENT INFORMATION'.
- INVOICE SAOGEA098203:** An invoice document with a header section including 'INVOICE DATE', 'CUSTOMER ID', and 'SHIPMENT NO.'. It features a table for 'TOTAL CHARGES' with columns for 'DESCRIPTION', 'AMOUNT', and 'CURRENCY'. The bottom section includes 'CUSTOMER ID' and 'SHIPMENT NO.'.
- Sea FCL Arrival Notice:** A document with a header section including 'THE IMPORT BROKER' and 'DEPART DATE'. It contains a table for 'SHIPMENT DETAILS' and 'COMMENTS', followed by sections for 'SHIPMENT INFO', 'SHIPMENT TYPE', and 'SHIPMENT INFORMATION'.
- Authority To Make Entry:** A document with a header section including 'IMPORT BROKER' and 'SHIPMENT NO.'. It features a table for 'SHIPMENT DETAILS' and 'COMMENTS', followed by sections for 'SHIPMENT INFO', 'SHIPMENT TYPE', and 'SHIPMENT INFORMATION'.

## Creating a Document

When creating a document with DocBuilder, there are strategies to work “smarter, not harder.” As the module comes with the previously mentioned templates, a helpful strategy to creating any documents would be to use related or similar templates already available. Eventually, as CargoWise users build out their own document layouts (custom **Document Configurations**), they will also be able to use these documents as templates in the future for similar shipment situations and repeat customers.

DocBuilder comes with more than one thousand templates for users to grab as a starting point for their documents, all based on documents needed throughout the booking to final delivery and invoicing of a job. To use already built documents from CargoWise DocBuilder, users can select their choice from any “Document” menu. Then after selecting their preferred format (PDF, Word Document, etc.), they can deliver it via printer or email.

### TYPES OF DOCUMENTS

DocBuilder has been set up with ready to use (or to start custom configurations from) documents for all common types of documents seen throughout the process of freight forwarding and freight brokerage. This gives users the ability to increase their internal efficiency and productivity by having all document management in one place and the opportunity to add document automation.

DocBuilder formatted documents can be set as the default document choice over the pre-existing Legacy Documents (when both types exist for a user company) using the following path: “Admin” > “System” > “Registry” > “Documents” > “DocBuilder” > “Use New DocBuilder Freight Documents”. From booking to delivery, some of the common document types used by CargoWise DocBuilder users are:

- **Invoice**

DocBuilder is not automatically turned on for invoices, but they can be turned on and then have Sections applied to pull/populate information from an order in CargoWise (E.g. origin/destination addresses and other conditions).

- **Arrival Notice and Delivery Orders**

Customizing arrival and delivery notices through DocBuilder is through the opening of a shipment, selection of **Documents**, then the **Customize Documents** menu item.

- **Customs Delivery Order**

Each module in CargoWise will have its own set of documents that can be added and customized using DocBuilder, with some that are shared across modules. Brokers issuing customs delivery orders can use DocBuilder for “B” file (brokerage, versus “S” files for shipments) documents, but there are specific additional steps to achieve this listed below.

## Creating Custom Delivery Orders

When issuing a Customs Delivery Order from a Brokerage file, an 'Edit Customs Delivery Order' box pops up. This screen allows you to add Delivery Instructions, create additional delivery orders (multiple containers requiring their own D/O), and add any other information.

Headers								
Print?	Ordr. Ref.	Shipper	For Delivery To Address Override	For Delivery To Organization	For Delivery To Address Selector	Inland Carrier	Last Free Day	Prepaid/Collect
<input checked="" type="checkbox"/>	7716576		<input type="checkbox"/>	BOBSUP_US	123 DREARY LANE		12-OCT-22	

Details									
Cust. Ref: 7716576		Inland Carrier: (None Selected)		Customs Release Attached: <input type="checkbox"/>					
For Delivery To: BOBSUP_US		Carrier's Local Agent: (Invalid Selection)		Customs Release With Carrier: <input type="checkbox"/>					
Address Contact: 123 DREARY LANE BOBS SUPER ORG 123 DREARY LANE SEATTLE WA 98107 UNITED STATES		IT Date:		IT No.:		Last Free Day: 12-OCT-22			
Prepaid/Collect:		Bill To Party: (None Selected)		Delivery Instructions:					

Bills											
Bill Type	Bill Number	Containers									
MB	TXIEEY50255...	Number	Seal	Type	Mode	No Of Packages	Package Type	Weight	UQ	Slot Reference	Last Free Day
		16147		VANT		26	PAL	16,471.4...	KG		

### Document Menus

Name
Customs Certificate
Customs Certificate
Customs Declaration Form
Customs Declaration Response
Customs Delivery Order

Available Templates			
Template Name	System	Client	
US CustomsDeliveryOrder	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
US CustomsDeliveryOrder	<input type="checkbox"/>	<input type="checkbox"/>	
Unclassified Invoice Batch Report	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

When you need to customize the Customs Delivery Order (for example, include name and email address for the delivery appointment) the same method is used when you're customizing any other document but with one exception: the name of the copied template needs to be the exact same as the system template name.

If the template name is different, the customized delivery order can still be generated but the Edit Customs Delivery Order prompt will not appear.

When needed, users can create custom Document Configurations of compiled information that does not fit into one of the above document options. Starting from templates that are relevant gives users an easier process to add and remove Sections from the document so that it has only the elements needed.

## Custom Document Configurations and Sections

The most vital aspect of DocBuilder for CargoWise users is the ability to create custom Document Configurations and Sections straight from the modules within the software. This enables a single platform for all document management and decreases time wasted on integrating external processes onto CargoWise.

Users can build a Document Configuration from a list of pre-built horizontal strips called “**Sections.**” These Sections pull data straight from the order on CargoWise. Users can create their own strips to add new configurations, but they can also override and edit existing Sections. An example of overriding a Section would be changing the format of a logo in the header of a document to have a square dimension, instead of the rectangular standard.

### CREATE A NEW CONFIGURATION OF A DOCUMENT

Customized Document Configurations are when CargoWise users create versions of document that have slight variations based on the needs of that document (e.g. customer desired addition of data or customer desired omission of data). Instead of making a new document for the specifications of certain customers or situations, those documents can be given configuration options, lessening the disorganization and overloading of the **Document Menu.**

The first step to creating a new Document Configuration after selecting **Documents (Customize)** from the **Documents** selection from any job (e.g a shipment) is selecting the document you want to add a configuration to. Then from there, you select the **System Document Elements** from the list that appear on the left side of the window under the **Available Templates** window.

Note: If your document choice already has configurations, then the option to create more will be **Customized Document Elements** instead.

Customize Document Menu - Production - Branches New York - Company: Green Worldwide Shipping, LLC - Department: Branch

File Edit View System Data Source Maps Documents Help

**Document Menu**

Name	Sys.	Client	Publsh	Menu Path	Index	Support	Allow	H	Restrictio	No Auto	Dir	Doc	Restrictio	Def	Atta	Delivery	Rest
Customs Instructions				Departure	19							DDP	BRE	NON			
Customs Invoice				Customs	0							ANY	NCT	NON			
Customs Release Status				Customs	0							ARV	NCT	NON			
Customs Release Status				RNG	0							ARV	NCT	NON			
Customs Worksheet				Customs	44							ANY	NCT	NON			
Dangerous Packing Certificate				Exporter Documents	3							ANY	NCT	NON			
Delay Alert				Arrival	16							ARV	ONE	NON			
Delay Alert				Legacy Documents/Arrival	16							ARV	ONE	NON			
Delete OHD				OHD	2							ANY	NCT	NON			
Deliver Labels (label printer)				Arrival	13							ARV	NCT	NON			
Deliver Labels (label printer)				Arrival.Labels	13							ARV	NCT	NON			
Deliver Labels (label by side)				Arrival	13							ARV	NCT	NON			
Deliver Labels (label by side)				Arrival.Labels	13							ARV	NCT	NON			
Delivery Order				Arrival	2							ARV	ONE	NON			
Delivery Order				Customs	19							ANY	ONE	NON			
Delivery Order				Customs	20							ANY	ONE	NON			
Delivery Order				Legacy Documents/Arrival	2							ARV	ONE	NON			
Delivery Order with Packages				Arrival	3							ARV	ONE	NON			
Delivery Order with Packages				Legacy Documents/Arrival	3							ANY	ONE	NON			
Delivery Summary				Arrival	4							ARV	ONE	NON			
Delivery Summary				Legacy Documents/Arrival	4							ARV	ONE	NON			
Disbursement Note				Arrival	8							ARV	AR	NON			
Disbursement Note				Legacy Documents/Arrival	8							ARV	AR	NON			
Disbursement Report				Customs	21							ANY	ONE	NON			
DocBuilder Cash Advance Request				Customs	0							ANY	AR	NON			
DocBuilder Invoice				Departure	100							ANY	AR	NON			
DocBuilder Invoice				Customs	140							ANY	TRC	NON			
Document of Origin				Customs	22							ANY	NCT	NON			
Documentary Collection Form				Exporter Documents	14							ANY	ONE	NON			
Documents Available Notice				Arrival	6							ARV	ONE	NON			
Documents Available Notice				Legacy Documents/Arrival	6							ARV	ONE	NON			
Domestic House Bill				Domestic	1							ANY	NCT	NON			
EFT Payment Advice				Customs	24							ANY	NCT	NON			
EFT Request				Customs	0							ANY	ONE	NON			
EFT Request				Legacy Documents/Customs	25							ANY	ONE	NON			
EFT Request With Entry Print				Customs	0							ANY	ONE	NON			
EFT Request With Entry Print				Legacy Documents/Customs	26							ANY	ONE	NON			
e-Manifest Cover Sheet				Customs/7513	3							ANY	NCT	NON			
Entry Print				Customs	27							ANY	ONE	NON			
Entry Print				Customs	28							ANY	ONE	NON			
Entry Print				Customs	29							ANY	ONE	NON			
Entry Print (Landscape)				Customs	29							ARV	ONE	NON			
Entry Print (Landscape)				Legacy Documents/Customs	29							ARV	ONE	NON			
Entry Print (Portrait)				Customs	30							ARV	ONE	NON			

**Available Templates**

Template Name	System	Client
SAD Copy 3		
SADH CB8		
SADH CB8 Plain Paper		
Sanitary Certificate		
Sea Cargo Weight and Measurem...		
Sea Import Delivery Order		
Shi Lien Dan		
Shipment POD		
Shopper Departure Notice		
Shopper ID Verification		
Shopper Security Endorsement		
Shopper's Export Declaration (SED)		
Shipping Detention Rates		
Shipping Order		
Shipping Rate Table Format		
Shipping Rates Table Format		
Shipping Standard Pricing Page		
Simplified D/O e-Draft		
Standard Landed Costing		
Standard Shipping Note		
Supervising Office Report		
System Collected Advice		
System Document Elements		

**Templates Used**

Title	System	Print	Client	Pvd.	Ind	Type	Filter	Doc Type	Template Name
Invoice					0				System Document E...
ARInvoice Extra Com					1		*Shipmen_PrimPag...	INV	ARInvoice Extra Co...
Extra Periodic Detail					2		*ARInvoice.IsPena...	INV	ARInvoice Periodic D...

**Customizable Document Configuration**

System	Templ	Company	Default	Order	Type	Section Name	Filter
		ATL		1	HAL	Invoice Letterhead	
		ATL		2	HAL	Invoice Document Title	
		BALREBEP		3	HAL	Invoice Company Tax Registration References	
		ATL		4	HAL	Invoice Recipient + Dates + Transaction References	
		ATL		5	BDY	Consol Number	
		ATL		6	BDY	Shipment Details Section Header	
				7	BDY	Consignor Company Name + Consignee Company Name	*CARInvoice.Shipment.D...
				8	BDY	Consignor Company Name & Address + Consignee Comp...	*CARInvoice.Shipment.D...
				9	BDY	Order Numbers/Owner's Reference	
				10	BDY	Goods Description (Single Line)	

Copy Selected New Edit Load

Copy Config to New Menu

Then, on the right side, you will see a window called **Customized Document Configurations** toward the bottom which will be the home of the configurations you make for this document. Click the Copy Selected button on the bottom right and a window will pop up to make the changes desired for the new configuration. Use the buttons above the right side of the window to move the order of Sections, remove Sections, or add Sections from the library of Sections available from your documents.

You can preview the look of specific Sections and the whole document from this window. Once the Document Configuration is made up of the new combinations of Sections desired, you can need to specify the Company (and optionally, this is when to specify the Client). Users must click save at the bottom right of the **Document** window to save this new configuration to their files.

As a team builds out its custom Document Configurations from available templates, its “Customizable Document Configuration” list options will grow for documents with unique combinations of the information shown.

**Note:** The **Templates Used** window can be used for further operational uses as a deeper level of customization for the selected document.

## CREATING NEW DOCUMENTS FROM A PREVIOUS DOCUMENT

As briefly touched on before, CargoWise users shouldn't create new documents when they could fall under another as a custom Document Configuration (outlined above). If it is a new document type and for different use cases, the suggested method of creating new documents is to start from the format of another (similar) preexisting document from the **Document Menu**.

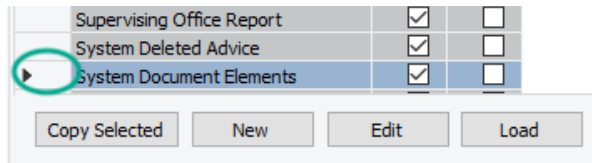
As with custom Document Configurations, if the new document is exactly the same as the copied document when completed, it will not let you save it. After selecting their chosen, similar starting point document, users will click on the bottom middle button **Copy Config to New Menu**. **This creates** a new row on the **Document Menu**, while labeling the new document as the previous document name with "Copy" at the end. The document needs to be renamed descriptively, based on a team's naming protocol.

On the bottom right, select **Edit**. Remove and add Sections, from the available (DocBuilder and custom Sections) Sections in the left Sections window to build the new document. The user can now save the document and it is ready for use.

## CREATING A CUSTOM DOCUMENT SECTION

When you click into a document, click edit, and click **Preview Section**, users can preview the Section itself with the macros involved. Custom Sections are created when the Sections available don't fit the desires or needs of an individual piece of a document. For example, if a document had a Section called "Goods Description" that used a macro to pull the description of a job's goods straight from the job, but you also wanted it to pull the customer name in that section as well. For that situation, you would need to create a custom Section. **Macros** are used to represent values from the job in documents but are also used extensively in CW1 automation, in areas such as Workflow and filters.

Like with documents and Document Configurations, custom document Sections should also be copied from a previous and similar version (in this case a Section). After selecting the starting Section you want to create a custom version of, copy the title of it for future use in the creation process. Once you know what macro you want to be added to customize your Section (like the example of the good description or company name in one Section above), go back to the document window. From the **Available Templates** window, left click the **System Document Elements** arrow (Note: Click the arrow next to the text, not **System Document Elements**. See Below).



After that left click, select the **Copy Selection for Customization** option. A new window will pop up with all your document Sections, and you can use your keyboard Ctrl + F to find the Section to customize with the title that was copied. Once it is highlighted, click **Copy** to open up the **Customized Document Elements** sheet to create the custom Section.

The copy should open at the very end of the page, but if not, the user can also use the Ctrl + F to find the Section again. Firstly, the name of this new custom Section must be changed to secure that it is saved when done. After editing the Section accordingly (using macros and other changes), save the file and then also click save in the bottom-right of the document window to save the new Section.

Control over the functionality and appearance of documents through DocBuilder is powered by the use of Sections – through addition or exclusion, repetition, and placement order on a Document Configuration.

## Section Types

Section Types help define the actual location of Sections within a Document Configuration. If users know they want the Section/information of their order in the header, footer, specific page header/footer, or the body area, they can use Section Types. Most Sections are body area sections. Each Section Type is configured when the Section is made or customized.

## MACROS

A macro is a piece of code recognized by CW1 that starts and ends with <> brackets. A macro represents a single data value in the system - a field, code, date, etc. The macro itself can also contain additional code that determines its behavior and appearance. Macros are used to represent values from the job in documents but also used extensively in CW1 automation, such as workflow and filters.

Some of the most common macro examples are <JobNumber> (lists the job number of whichever job the macro is generated in), <Now> (automatically inserts a datetime value of current date and time), and <BranchCode>/<CompanyCode> (used to identify branch codes and company codes).

**Macro Shortcut:** Click into the field / date field that is to be represented by a macro and press Ctrl+Shift+R. That will pull up the control information window and the macro will be listed at the very bottom.

The most common macros should work everywhere. On the other hand, not all fields/dates/values are stored directly in the CW1 database and therefore aren't represented directly by a macro. Therefore, it often depends on what module a user is working in and what data field map is available for that module, and whether the macro is in that map.

The Section “Types” can be seen below and help users place order information in the appropriate location on documents for their team’s and customers’ ease of use.

- **HAL:** Appears in the page header section on the top of every page in the Document Configuration.
- **HFP:** Appears in the page header section on the top of only the first page in the Document Configuration.
- **HS2:** Appears in the page header section on the top of every page starting on the second page of the Document Configuration.
- **BDY:** The default Section Type, “BDY” will add this Section to the body of the Document Configuration based on order on the “Shown Section” window. It will not auto-populate more than once.
- **BEX:** Appears once in the page body section, and can be used for multiple lines of copy (e.g. a list of containers on a consol).
- **FFP:** Appears in the page footer on only the first page in the Document Configuration.
- **FEL:** Appears on the page footer of every page but the last one. If there is only one page, this Section won’t be shown.
- **FLP:** Appears on the page footer of the last page only. If there is only one page, this Section will be shown.
- **FAL:** Appears on the page footer of every page.
- **FFB:** Appears on the page footer if no other footer has Section Type has been specified on the Document Configuration page.
- **FFU:** Appears on the first page of a Document Configuration only. If there is only one page, this Section will not be shown.
- **FFE:** Appears on the footer of only the first page, but only if there is one page only.
- **BPG:** Appears on the back of every page when printing.

If a Section Type is specified for a Section added to a Document Configuration, the Section will automatically place the Section where specified. Sections can be placed in the desired order within a document Section Type, but doesn’t allow moving of a Section into a contradicting placement area.

## Section Filters

Section Filters are used on DocBuilder to show or suppress Sections on a document based on certain criteria being met, adding more automation to the document creation process of CargoWise Users. If the filter is blank, the default will be to show the Section.

If there are Section Filters added, then that Section will not be shown unless the value of the contents meets the criteria to make the filter true (or correct).

### Templates Used

▼ Title	System	Print	Client	Pwd.	Ind ▲	Type	Filter
▶ Invoice	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0		
ARInvoice Extra Con...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1		"<Shipment.PrintPageWithContainerNumber>"=="Y"
Extra Periodic Detail	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	2		"<ARInvoice.IsPeriodicInvoice>"=="Y"

For instance, in our previous company example, Caitlin's Wines, wanted to only have their phone number present in the header of documents that were located in the United States. Then the macro representing the customer's country code would have to equal "US" for that Section to populate ("`<CompanyCountryCode>`" = "US").

Filters can be used to only pull information onto a document configuration that is helpful or needed based on the specifications of the macros. Combinations of this logic can be used to join multiple conditions/criteria together into one filter expression.

## Document Languages

DocBuilder documents can be created, printed, and delivered in multiple languages. Not only can CargoWise users have documents shared completely in different languages, they can also use DocBuilder Sections to change only portions of a document to an alternate language

To manage the language settings of a completed document, select the language in which to issue the DocBuilder document from the **Deliver Documents** window. After a warning notifying the user that they have chosen a translated version, you are able to share or populate the document in the desired language. Language-specific Section templates also can let only specified Sections of a document be output in multiple languages.

As the logistics and supply chain industry is all about connecting goods and services across the globe, it is vital to incorporate document management that matches the diversity of languages that will be encountered. CargoWise users removing the steps of translation by their team or customers are adding a greater value to their services for international business.

## Document Themes

Another important feature for the customization of documents using DocBuilder is "Themes." Themes can change the colors and fonts of each Section in a document to create the aesthetic desired by CargoWise users and/or their customers.

Users can provide a professional, cohesive, and on-brand document experience to their customers to aid in strengthening brand loyalty. These Sections can be styled even further by copying the complete list of **System Document Elements** into the **Customized Document Elements** window and changing Sections as required. Any design changes that can be made through Excel can be made on DocBuilder documents using Themes.

## Benefits of Utilizing DocBuilder


CargoWise software can elevate logistics businesses by being a platform that brings all aspects of the operation together. If their modules are used comprehensively by a team, the return on investing in these products can be seen in the resulting customer satisfaction and strengthened operational processes. DocBuilder is a module that brings their users both of these results when teams are trained properly on the software and features are fully utilized.

A recent study surveying 100 shippers by FreightWaves and Logixboard found that [only 2% of respondents didn't find customer service and individualized attention as "important"](#) from their freight forwarders. The customization features of DocBuilder provide a personalized customer experience that will strengthen the value of CargoWise users' services, moving their company to be seen as more of a partner than a vendor by shippers/BCOs.


With the large volume of documents required per forwarding order, document management software allows companies to efficiently handle and increase their productivity of orders by removing manual processes. If certain criteria are outlined in software to result in the automatic population of the correct document formats and information, then that time is given back to the team for higher value work. Manual input errors are also avoided when software like DocBuilder is pulling this information automatically using macros.

CargoWise users and all logistics service providing companies need to be using document management software as part of their operations to stay competitive in the marketplace. DocBuilder provides the opportunity to do that through software that can also host a plethora of their other processes with integrated modules. The next step in the digitization of the logistics industry is ensuring that digital tools are set up to be interconnected and stacked together in a way that provides a seamless experience for the internal and external teams of a company. Learn more about evaluating a digital tech stack in the logistics industry with this new Digital Tech Stack Scorecard.


Check out more  
FREE CARGOWISE  
TRAINING GUIDES



[Workflow Guide](#)



[Container Automation](#)



[Quoting Guide](#)