2026

One View Training Manual

fern

an Nth Degree company

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Adding a Credit Card to the Wallet

THIS CAN ONLY BE COMPLETED ON THE EXHIBITOR'S SIDE! ESRs CAN NOT ADD A CARD TO AN EXHIBITOR'S WALLET.

Exhibitor Step-by-Step Directions

1. Sign in to your OneView portal.

2. Click the dropdown menu next to your name in the top-right corner.

3. Select "Wallet."

4. Enter the billing address associated with the card you want to add.

5. Input the card details.

6. Click "Save."

The card will be added to your wallet and set as the default payment method.

To add another card, follow the same steps.

Once in the "Wallet" section, select "Add New Card" to save an additional payment method

Notes

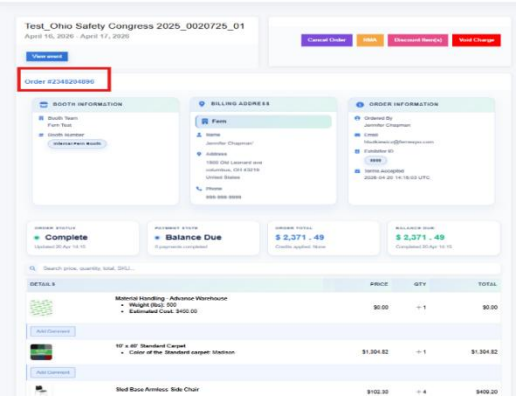
- If there is more than one card on file and the default throws an error (expired/compromised/etc), than the other card on file will fall into the default
- The billing address on file is associated with the default card; if another card on file needs to be ran, confirm the billing address for that card with the exhibitor.
- If an exhibitor pays with a card on site, once the transaction is complete, that card will stay in their wallet and set as the default card.
- The exhibitor is the only person who can change the default card and/or delete a credit card from their wallet.
- If there is more than one card on file and the default throws an error (expired/compromised/etc), than the other card on file will fall into the default

There is one work around to be able to complete this for the exhibitor:

- Enter a small amount of EST Material Handling and add their card for that payment. The order will be a zero charge unless we receive freight but it will add the card to their wallet.

Adding A Card to a Previous Order

1. Go to their order and click on the order number at the top left of the page (this will take you to the solidus page).



2. Click on the tab that says “customer”

a. This is where you will enter (or confirm) the billing address for the card they are putting on file

b. Once entered, hit “update” at the bottom of the page

3. Click back on the “payments” tab

4. In the upper right-hand corner, hit “new payment”

a. If there is a card on file, it will list the name and last 4 digits.

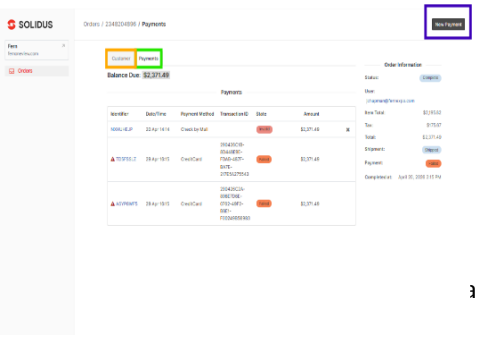
5. Click on the circle next to “use a new card”

a. This should automatically bring up the card field

6. Enter the card information and press “save”

7. Press Submit

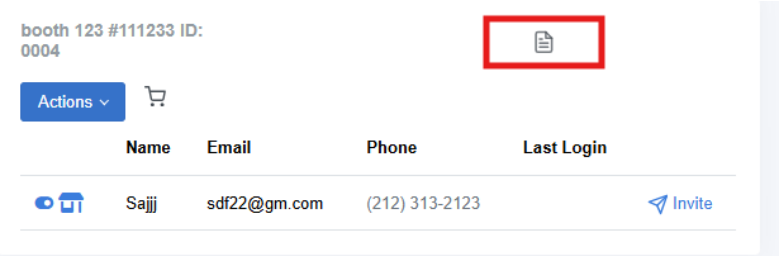
This will add the card for that order, please note that cards batch run over night so a paid invoice won’t be available until the following day.



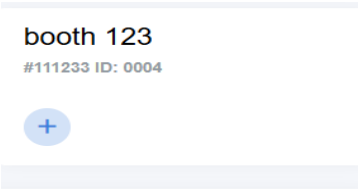
Adding Notes To OV

Adding notes for an individual exhibitor.

1. Click on “booth teams”
2. Go to the booth you are wanting to add notes to.
3. Click on the paper icon.

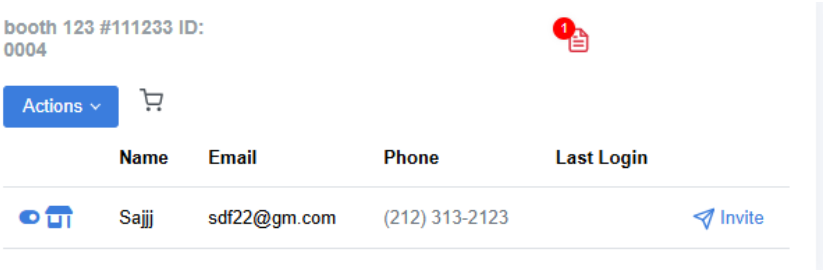


4. Click on the plus sign under the booth name.



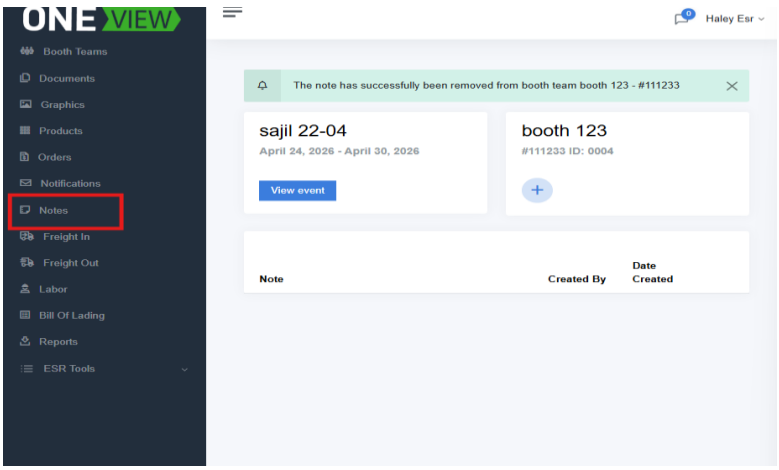
5. Add your note.

When adding the note, it will turn the paper icon red indicating that a note is present



Adding notes for the show that are not exhibitor specific.

Any notes for the show (not exhibitor specific) can be added through the notes tab.



Bill of Lading (BOL)

Creating a BOL

1. Click on the **BOL** tab.
2. Locate the correct booth.
3. Click the **plus (+) sign** next to the booth name.
4. Enter the **Ship To Destination** information.
5. Enter the **Label Quantity.**
    - Enter the actual number of labels required. Example: If 10 labels are needed, enter 10.
6. Enter the **Carrier** information.
7. Complete the **3rd Party Freight Charges** section.
    - This field must be completed regardless of the carrier being used.
    - If the exhibitor is shipping through Fern Transportation, toggle the Fern Transportation button. The address information will automatically populate.
8. Click **Submit**.

You will be returned to the BOL task screen.

Printing the BOL

1. Under the **Print BOL** column, click the printer icon.(use the 4 part BOL paper here)
    - The system will automatically generate a four-page BOL.
    - When printing, select Quantity 1. All four pages will print automatically.

Printing Labels

1. Under the **Print Labels** column, click the printer icon.(use the green or white labels here)

- The system will generate labels based on the quantity entered when creating the BOL.
- Labels print four per page. (Exp. If 9 labels were entered, pg 1 = 4 labels, pg 2= 4 labels, pg 3 = 1 label).

Discounts/Credits

RMA = Returned Merchandise (refund/return)

- This will be used for 100% refund of a partial return
    - Exp. An exhibitor ordered 4 chairs and cancelled 2 pre-show. We will use RMA to fully refund the 2/4 chairs.
- This should only be completed Pre-Show

Discount Item(s)

- This will be used for a whole order or per piece

Cancel Order

- This will cancel the whole order and refund any charges that were submitted.
- If we are giving a 100% refund for a cancelled order, than place 0% in the cancellation fee.

Void

- This is only available until the credit card on file has been charged.
- This will void the card on file but will keep the order.
    - Use this if they contact saying they want to pay via another way.

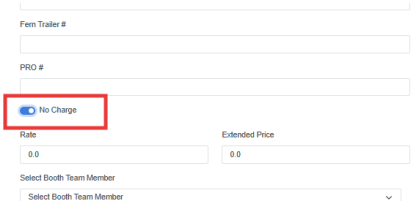
Notes

- When submitting any discount/credit, be specific in the NOTES section as they go to accounting.
- Any credit/discount OVER 10% of the order will go to accounting.
- Any credit/discount UNDER 10% of the order will automatically be refunded.

Freedom Shipping Entries

Freight In - Freedom Shipping

1. Enter the freight shipment following the standard Freight In process.
2. Select Freedom Shipping as the carrier.
3. Under the Pro Number section, toggle No Charge.



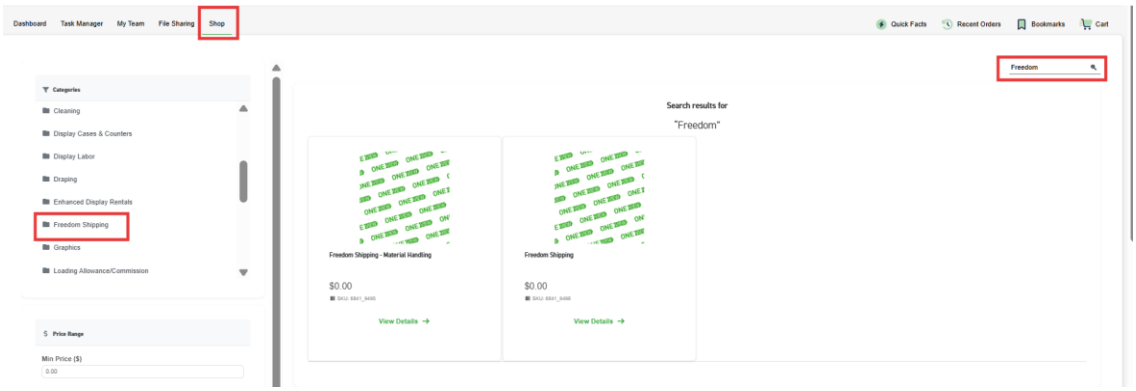
4. Complete the remaining freight information as normal.

> Notes: Both the shipping charges and material handling charges for these shipments are billed directly through the shop. We still need to record and track all incoming shipments for reporting and inventory purposes. Material handling charges should not be billed through the Freight In screen.

Entering Freedom Shipping Charges

1. Access the exhibitor's portal and place the order on their behalf.
2. Select the Shop tab.
3. Under Categories on the left-hand side, click Freedom Shipping.

   Alternatively, you can use the search bar and search for "Freedom".



4. Two products will be available:

- Freedom Shipping – Material Handling
- Freedom Shipping

5. Enter the pricing provided by Fern Trans under the appropriate product.

There should be two separate entries

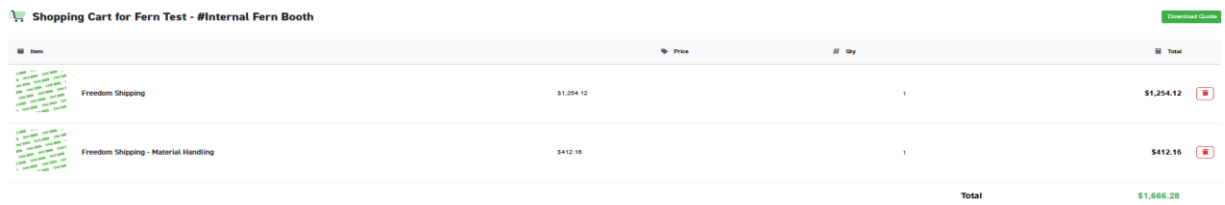
One for Material Handling Charges

One for Shipping Charges

After selecting the appropriate product, enter the price provided by Fern Trans in the price field.



6. Proceed to checkout. There should be two products in the cart.



If the exhibitor has a credit card available in their wallet, process the payment using the card.

If no credit card is available, complete the checkout process using Pay by Check and send the exhibitor the resulting invoice.

7. Monitor the order to ensure there is no outstanding balance due.

8. Once the charges have been successfully processed and the balance is paid, notify Skyler that the order has been charged.

Notes:

- Within Edit Booth Team, there is a toggle that can be enabled to indicate that an exhibitor is utilizing Freedom Shipping.

- When this toggle is enabled, an indicator will appear within the Freight In task to identify the booth as a Freedom Shipping exhibitor.
- Important: This indicator does not appear on the standard Booth Team task screen. Team members reviewing only the Booth Team task may not be aware that the exhibitor is utilizing Freedom Shipping.
- To improve visibility and ensure all team members are aware, it is recommended to add a note to the exhibitor's account. Notes display as a red indicator throughout the system, making the Freedom Shipping status visible across all applicable screens."

Freight In

Color Codes

White = Pre-Ordered Material Handling Placed by the Exhibitor

- While the order is still white, ESRs will be able to delete the entry

Teal = Ready To Audit

- The entry will turn teal after the receiver is entered

Green = Finalized (the cc will automatically charge overnight)

- Freight should not be Finalized until an audit is completed by the ESRs

Red = Freight Was Finalized but CC Declined

- If the CC declines, a pencil will appear next to the freight entry. If there is another CC on file you can choose to change the payment.

Entering Freight

- Do NOT delete the estimated material handling until the first shipment from that exhibitor is received.
    - For the first shipment, override the estimated material handling with the receiver's information. If there are multiple estimates, delete the remainder after the first receiver is entered)
- Under the “shipper” make sure to include the shipper’s name along with the city, state, or zip code where the shipment came from (Exp. Brumark/ 30331)
    - The comment area is used for notes pertaining to the shipment, such as “damage”
        - In the as400, we would include what was shipped cartons, crates, skids, etc. ; now these are chosen fields and do not require the ESR to type it out)
- “Submit the freight”
    - This will now appear teal
- After all freight is entered for the show, complete a freight audit for each shipment.
    - ONCE THE FREIGHT IS AUDITED AND FINALIZED, CHANGES CANNOT BE MADE!
    - This will now appear green
- ESRs can finalize a company’s freight in bulk

    - Check each box to finalize (shipments not ready to be finalized can be left unchecked)
    - To finalize all the freight, the booth members assigned must be the same. If there are different members assigned, ESRs will need to click each entry.
    - Shipments that are finalized together (in bulk) will combine onto one invoice/order number.
- Once the freight is finalized, to see a Pro Number, click the order confirmation number.

Freight Out

Entering Freight Out/Dead Bills

1. Click the plus sign on the correct exhibitor/booth.
2. Add the number of pieces that are on the dead bill.
3. Enter the total weight indicated on the dead bill.
4. Enter the date the freight was loaded.
5. Select/Enter the carrier that picked up the freight.
    - If it was a reroute, the carrier will be Fern Transportation
6. Enter the consignee (who the freight is going to)
7. Enter the destination.
    - You do not need to enter the full address; City/Sate/Zip is fine
8. Enter the pro number off dead bill if available.
    - If it is a Fern Transportation, make sure to add spacing between the TForce pro.
        - Exp: 123 321 123
9. The handling will only need to be changed if the options are applicable to the dead bill

· Reroute or Return To Warehouse

10. You do not need to enter a comment unless needed.
    - Reroute. “Fedex (or whoever the original carrier was) Failed To P/U Shipment
    - Short Pieces. “BOL completed by exhibitor showed 3 pieces; when loading, we only indicated 2 pieces”
11. Hit Submit.

Labor Entry

Labor must be ordered through the exhibitor portal; do not add labor directly in the labor screen.

Process Steps:

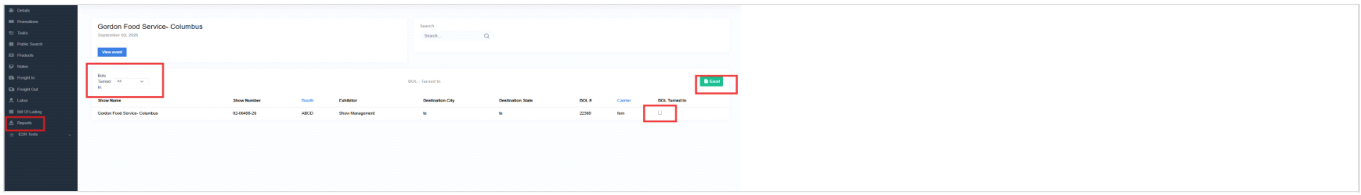
1. Open the labor screen.
2. Click the pencil icon next to the labor ticket.
3. Confirm the labor type is correct.
4. Update the date to when the labor was completed.
5. Verify the number of laborers.
6. Turn on “Fern supervision” if applicable.
7. Confirm the start and end times and check that the total hours are correct.
    - All labor (besides shrink wrap/banding) is based on a 1-hour minimum with ½ increments after that.
8. Select the booth team members.
9. Select the payment method.
10. Click Ready to Audit (this will turn that labor entry a teal color)
11. Once audited, finalize the labor.
    - After labor is finalized, the card will automatically be charged.

Marking a BOL as Turned In

Previously known in the as400 as placing an "M" on the BOL

Marking a BOL as Turned In

1. Click on “reports”
2. Go down to “BOL’s Turned In”
3. Click on the green excel button
4. Find the BOL you received
5. Click on the square under “BOL Turned In”
    - This will mark that we received the BOL



NOTES:

- We can filter the page by BOLs turned in or not turned in.
- We can run an excel file to show who has turned in vs who has not turned in their BOL.

Searching Recent Orders in One View

Information Needed to Search

To successfully locate a charge, you must have at least one of the following:

- Last 4 digits of the credit card
- Order number
- Amount charged
- Company name
- Individual's email address

How to Search Recent Orders

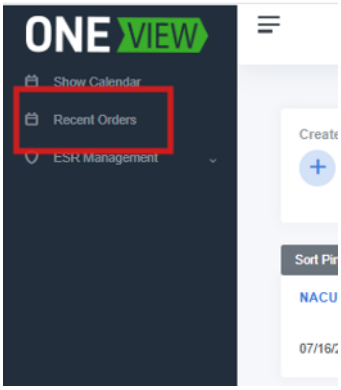
1. Log into One View

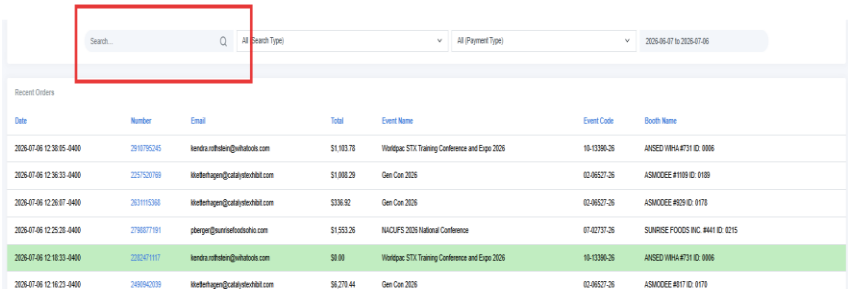
2. Stay on the main dashboard (do not enter a specific show)

3. On the left-hand side panel, click "Recent Orders"

4. Enter any of the available information provided by the exhibitor (listed above)

5. Review search results for a system match





How to Access the Order

1. Once the correct order appears, click the Order Number

2. This will open the full exhibitor order details

3. From this screen, you can:

- Review order details
- Confirm payment information
- Access invoice/receipt

Uploading List Into One View

One View Upload

Data Entry Rules

1. **Headers**

Do **not** edit any headers. Even a single extra space will cause the upload to fail.

2. **Column A – "Blank"**

Must remain in place. Do not edit or remove.

3. **Booth Team Name**

Maximum of 35 characters.

4. **Email Addresses**

All emails must be valid.

Check for extra spaces or missing extensions (e.g., .com).

5. **Column K – Booth Sq Ft**

Use only when:

- Booth dimensions (10X10, 10X20, etc.) have not been provided, OR
- Booths have irregular square footage.
- Enter whole numbers only (100,400,2000, etc.).

6. **Column M – Booth Size**

Enter booth dimensions only (numbers + capital "X").

Do not include ft., ’, “, or any text.

Must use capital X (not lowercase).

Correct formats: 10X10, 10X20, 20X20

Incorrect formats: 10' x 10', 10x20, 20ft x 20ft

7. Taxable

Must be entered as Y only.

Do not use "Yes".

8. **Exhibitor ID**

Leave blank on the initial upload. OneView will assign the ID.

Uploading the File

1. Save your complete list as a .csv file.

2. Go to the Booth Team tab.

3. Select Choose File and click Upload.

4. Wait ~30 seconds:

If no booths appear, recheck the file for errors.

Notes

- All booths MUST have a phone number.
    - If phone numbers are not provided, that column can be filled in with 999-999-9999
- All booths MUST have an email address. If an email is not provided, there are two options:
    1. Remove that exhibitor from the upload
    2. Enter email@gmail.com as their email"
- If there are any errors with the upload, the lead ESR will receive an email indicating what the error was.
- If an error occurs during the initial upload, remove any exhibitors that were already uploaded before retrying.
- If previously uploaded exhibitors are left in the list, the system will assign them new ID numbers and duplicate in the system.