

CLIENT DATA INTERCHANGE

Version 2.0 Upgrade Manual



Internet Software Designed to Assist Companies in all Areas of
International Shipping



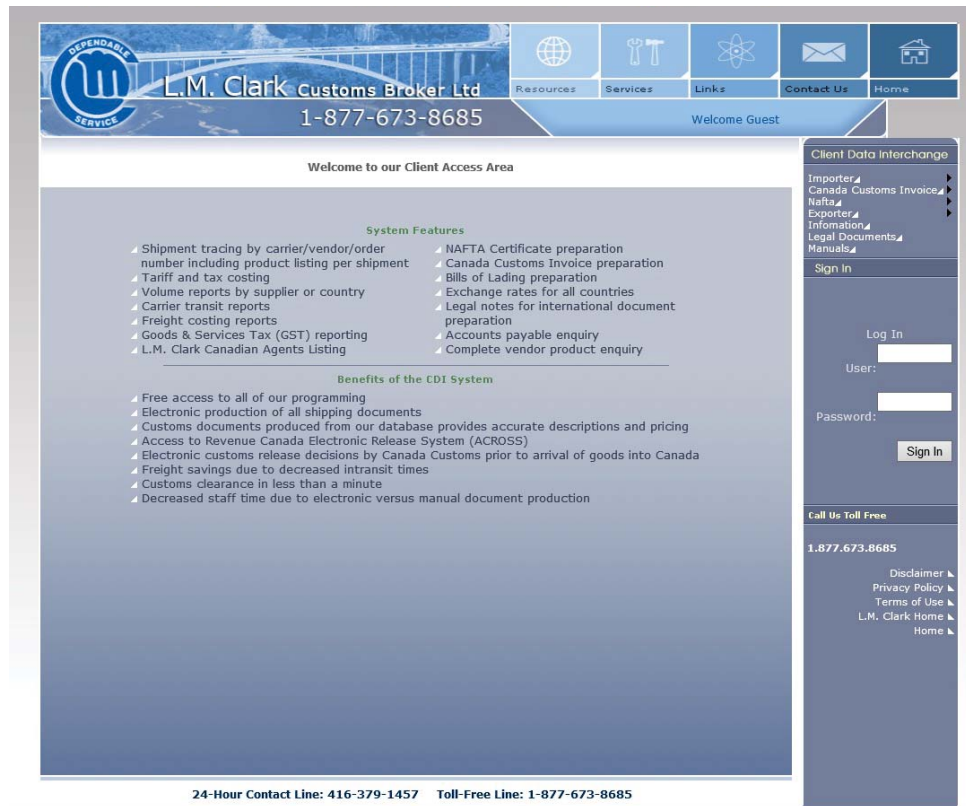
L. M. CLARK CUSTOMS BROKER LTD.

TEL: 905-673-8650

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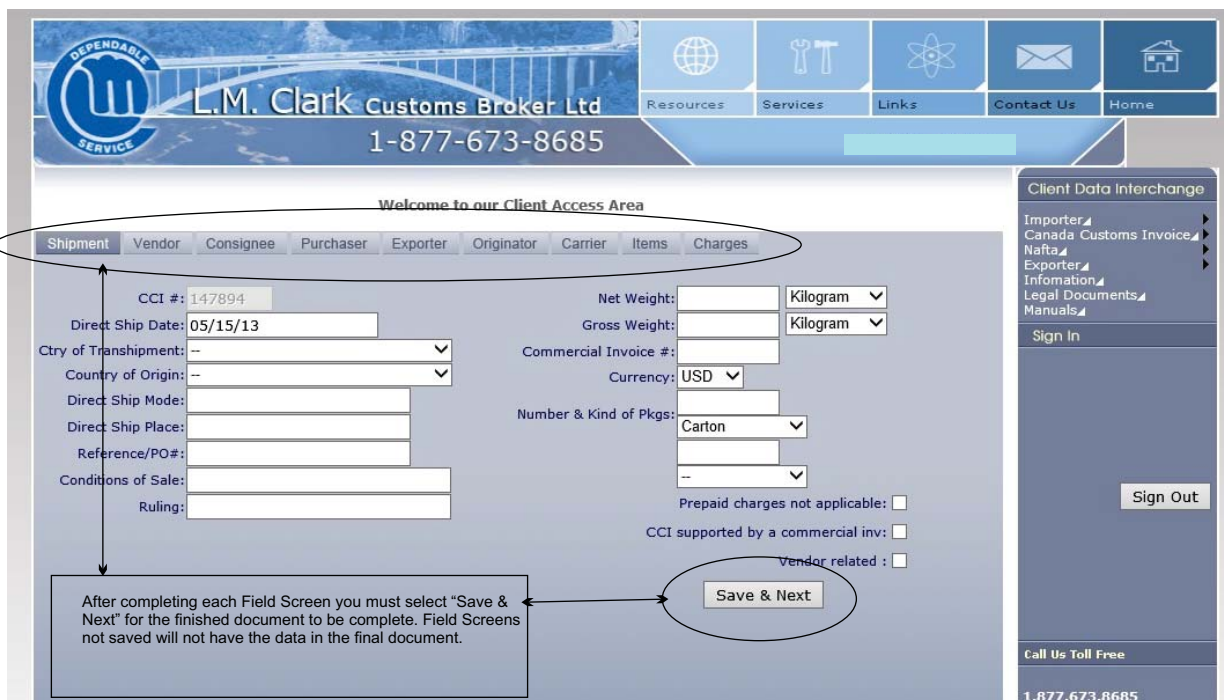
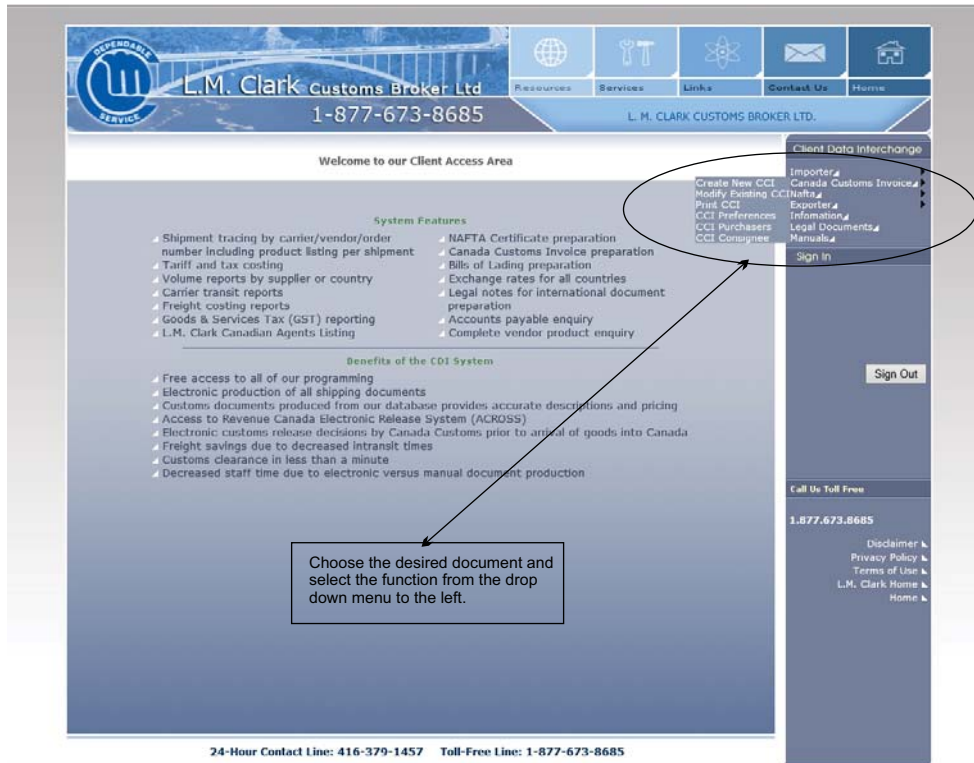


Highlighted Changes made to the original CDI Version 1.0

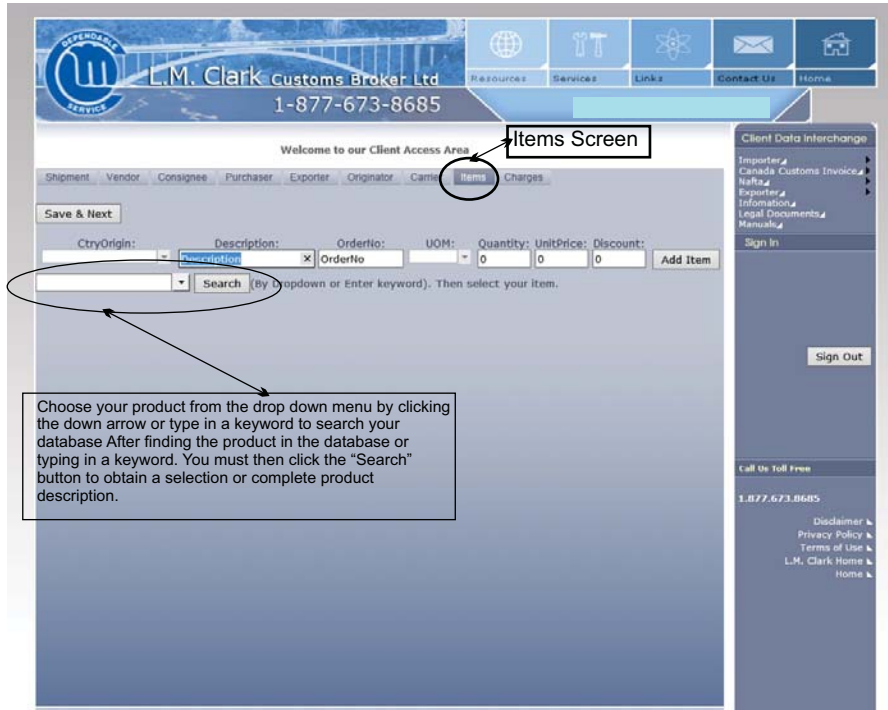
1. The CDI site is accessible through any Internet Browser (Internet Explorer, Google Chrome, Firefox, Safari etc.)
2. Changes to the new site eliminate the necessity of adjusting security levels and downloading Active "X" controls.
3. Canada Customs Invoices will now be printed on one page instead of 2 unless the number of items exceeds the capacity of the first page. Export and Nafta documents remain unchanged for printing purposes.
4. **Upon completion of any "Field Screen" you must select the "Save & Next" button or the information entered will not be saved and shown on your final document.**
5. You must select the "Add Items" button after completing the line of description field inclusive of pricing, discounts etc. This will refresh the screen and display the data before your next entry.
6. Clients with customized databases will now follow a 2 step process. You must first select or input keyword data and then click "Search". The data will show up once the screen is refreshed and you then verify that the data is correct and choose the "Select" option at the beginning of the line. Items entered manually do not require the 2 step process.
7. Documents that are saved and subsequently require modification must have all screen fields saved again even if no changes are being made to them. An error message will appear if you do not follow this procedure.

CANADA CUSTOMS / EXPORT INVOICE

Customized Database Application Procedures (With Part Numbers)



CANADA CUSTOMS / EXPORT INVOICE
 Customized Database Application Procedures (With Part Numbers)



CANADA CUSTOMS / EXPORT INVOICE

Customized Database Application Procedures (With Part Numbers)

DEPENDABLE SERVICE
L.M. Clark Customs Broker Ltd
1-877-673-8685

Welcome to our Client Access Area

Shipment Vendor Consignee Purchaser Exporter Originator Carrier **Items** Charges

Save & Next

CtryOrigin: NEW YORK Description: CORE LOSS TESTER OrderNo: OrderNo UOM: Number 6 Quantity: 6 UnitPrice: 56.00 Discount: 0 Add Item

Search (By Dropdown or Enter keyword). Then select your item.

After making and confirming the item selection complete the additional fields and select the "Add Item" button

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Welcome to our Client Access Area

Shipment Vendor Consignee Purchaser Exporter Originator Carrier **Items** Charges

Save & Next

Description	OrderNo	UOM	CtryOfOrigin	Quantity	UnitPrice	Discount	Total		
CORE LOSS TESTER	OrderNo	NMB	UNY	6	\$56.00	0	\$336.00	Edit	Delete

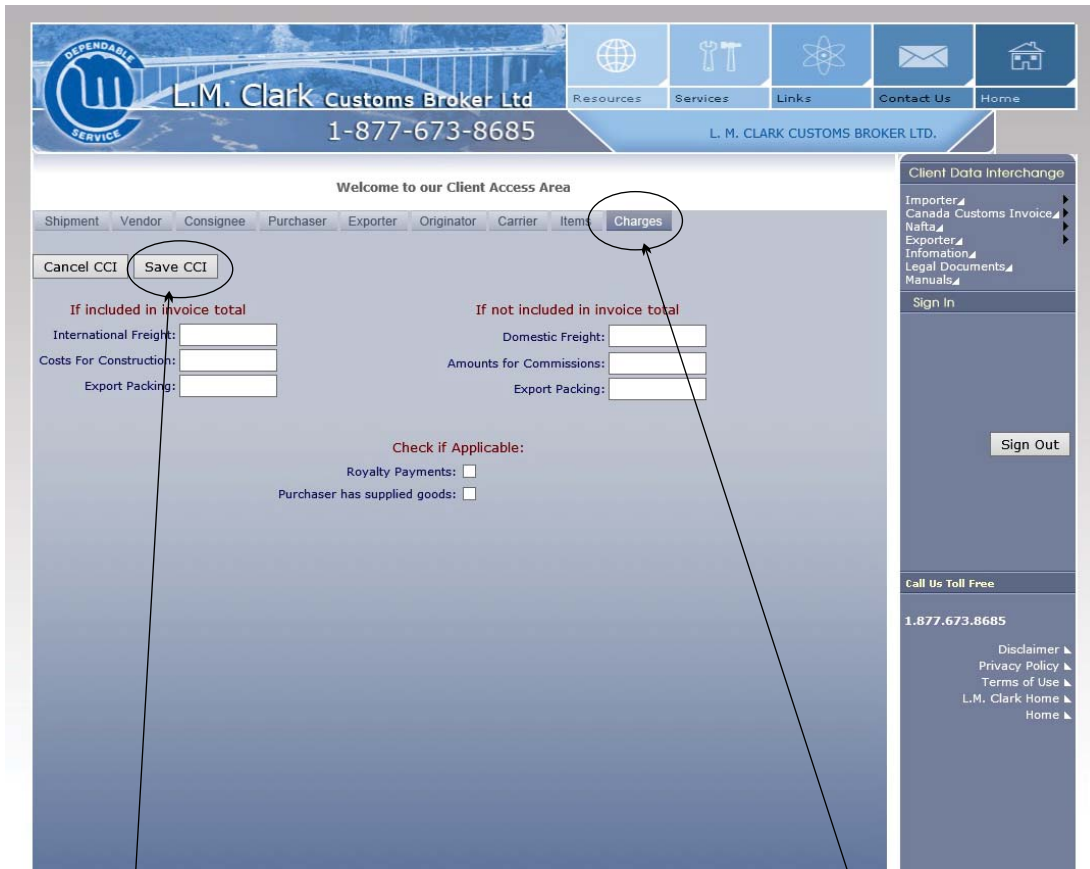
CtryOrigin: Description: OrderNo: UOM: Quantity: UnitPrice: Discount: Add Item

Search (By Dropdown or Enter keyword). Then select your item.

Once you click on the "Add Item" button the screen will refresh and the complete line will appear with an "Edit" or "Delete" option. Clicking on either option will give you the option to make changes. If the entry is correct follow the same procedure to add an additional item. If you are finished entering product descriptions choose the "Save & Next" button.

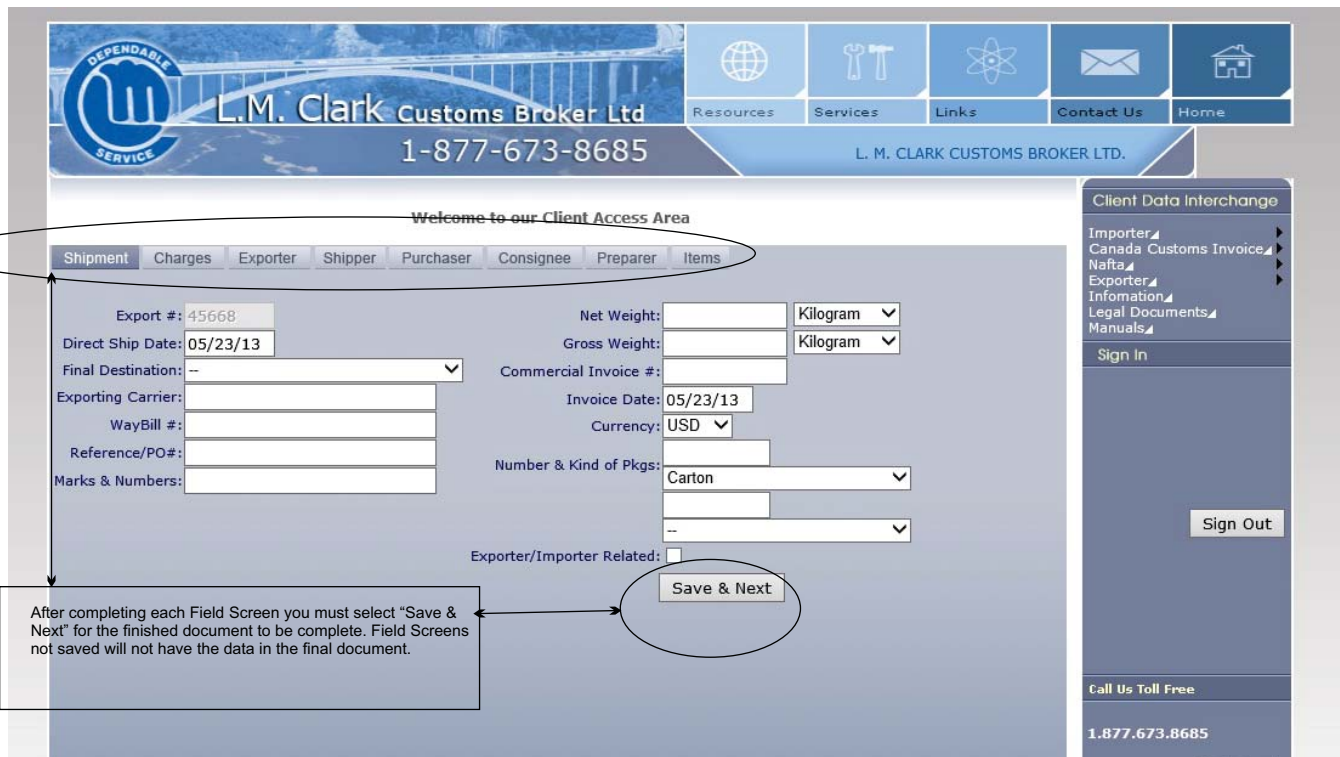
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CANADA CUSTOMS / EXPORT INVOICE
Customized Database Application Procedures (With Part Numbers)



For Canada Customs Invoices the “Save CCI” button is located on the “Charges” screen. If there is no data to enter on this screen just select the “Save CCI” option. Export Invoices can be saved directly from the “Items” screen.

CANADA CUSTOMS / EXPORT INVOICE
Generic Database Application Procedures (No Part Numbers)



CANADA CUSTOMS / EXPORT INVOICE

Generic Database Application Procedures (No Part Numbers)

The screenshot shows the 'Client Access Area' with a navigation menu at the top. The main content area is titled 'Welcome to our Client Access Area' and contains a form for adding items. The form includes fields for 'CtryOrigin', 'Description', 'Tariff', 'UOM', 'Quantity', 'UnitPrice', and 'Discount'. The 'Description' field is set to 'Description' and the 'Tariff' field is set to 'Tariff'. The 'Quantity', 'UnitPrice', and 'Discount' fields are all set to '0'. An 'Add Item' button is located to the right of the form. A text box with arrows pointing to the 'Description' and 'Add Item' fields contains the following text:

Complete the items fields manually or click on the down arrow in the descriptions field for a generic database if one is available. See screen below if a database is available. After competing each field select the "Add Item" button.

The screenshot shows the same 'Client Access Area' as the previous image, but with a dropdown menu open for the 'Description' field. The dropdown menu lists the following items:

Part_num	Description	Class_num
3886-02	ALUMINUM STRUCTURES AND PARTS	7610.90.90.90
3886-04	KEYS OF IRON/STEEL	8301.70.90.00
3886-01	MAGNETS, O/T METAL	8505.19.00.00
3886-03	OTHER LOCKS OF IRON/STEEL	8301.40.90.92
3886-06	PRINTER PAPER, IN ROLLS	4809.90.00.00
3886-05	PRINTERS, NESOI	8443.39.00.90

The 'Add Item' button is circled, and a text box with arrows pointing to the dropdown menu and the 'Add Item' button contains the following text:

Select the appropriate description from the database and complete all the other fields before clicking on the "Add Item" button

CANADA CUSTOMS / EXPORT INVOICE
Generic Database Application Procedures (No Part Numbers)

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L.M. Clark Customs Broker Ltd
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Welcome to our Client Access Area

Shipment Charges Exporter Shipper Purchaser Consignee Preparer **Items**

Cancel Export Save Export

CtryOrigin	Description	Tariff	UOM	Quantity	UnitPrice	Discount	Total	
UFL	KEYS OF IRON/STEEL	8301.70.90.00	NMB	63	\$5.26	25	\$248.54	Edit Delete

CtryOrigin: Description: Tariff: UOM: Quantity: UnitPrice: Discount:

Add Item

Client Data Interchange
 Importer
 Canada Customs Invoice
 Nafta
 Exporter
 Information
 Legal Documents
 Manuals
 Sign In
 Sign Out

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Once you click on the "Add Item" button the screen will refresh and the complete line will appear with an "Edit" or "Delete" option. Clicking on either option will give you the option to make changes. If the entry is correct follow the same procedure to add an additional item. If you are finished entering product descriptions choose the "Save Export" button.