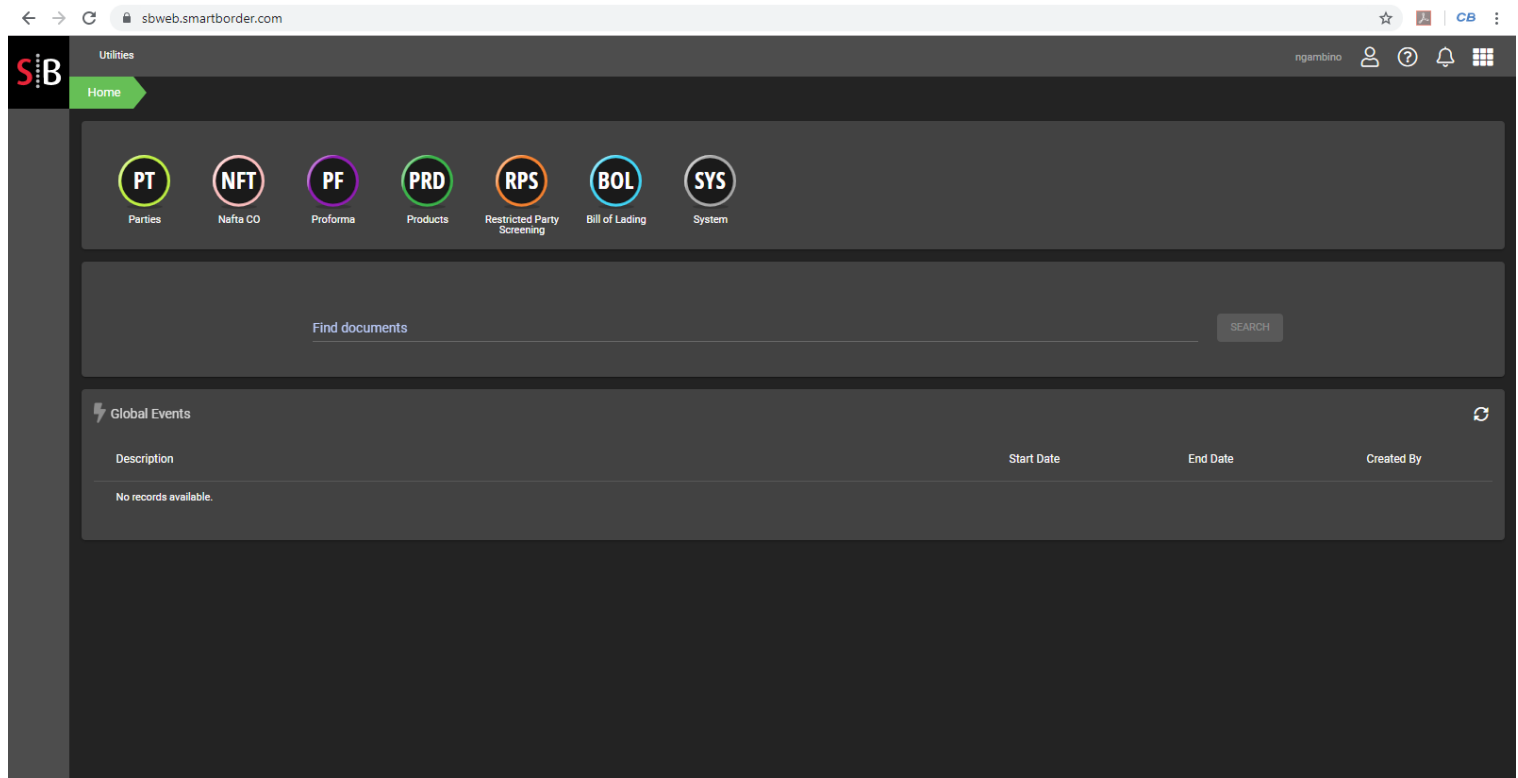


# SB WEB HOW TO

The current shipper side module legacy access will be going to read only soon as Smart Border has created a new Graphic User Interface (GUI) for companies to create pro formas, BOL's and NAFTA's.

The new web address is <https://sbweb.smartborder.com> and is currently approved to be used on Google Chrome.



You will see 7 buttons in the screenshot above. These buttons are as follows:

- PARTIES
- NAFTA
- PROFORMA
- PRODUCTS
- RESTRICTED PARTY SCREENING
- BILL OF LADING
- SYSTEM

There is also a link at the top “Utilities” which allows you to find Keyboard Shortcuts and Themes

We will mainly be using this GUI to create Proformas and BOL's.

This workbook will contain the following sections:

- **CREATING A PRO FORMA** (pg2-5)
- **CREATING A PROFORMA FROM TEMPLATE** (pg6)
- **CREATING A TEMPLATE** (pg7)
- **CREATING A BILL OF LADING**
  - **FROM PROFORMA** (pg8-9)
  - **FROM STAND-ALONE** (pg10-11)
- **SMART FOLDERS** (pg12)
- **EVENT HISTORY** (pg13)
- **CREATING A TRANSACTION PARTY**
  - **FROM PROFORMA** (pg14-15)
  - **FROM STAND-ALONE** (pg16)
- **CREATING A NAFTA**
  - **FROM PROFORMA** (pg17)
  - **FROM STAND-ALONE** (pg18)
- **IMPORTING AN EDI FILE** (pg19)
- **CUSTOMIZING THE GUI** (pg20)

# CREATING A PROFORMA



Click on the PF (Proforma Button)

Click on the Green + Button at the bottom right hand corner of the screen



The screenshot shows the Proforma creation interface. At the top, there's a navigation bar with 'PF' and 'Proforma' buttons. Below it, the 'Status' section shows 'Unposted' and financial totals. The 'Header Information' section contains fields for Company, Shipper Reference #, Invoice Date, Estimated Date/Time, State of Destination, Mode of Transportation, Port of Entry, Port Description, Carrier, Master Bill of Lading #, Shipping Quantity, Shipping UOM, Total Gross Weight (KG), Total Gross Weight (Pounds), Invoice Number, and Purchase Order. The 'Header Information Cont.' section includes Duty and Fees Billed To, Currency of Value, Terms of Sale, Est. Freight Charges to Destination, Reason for Export (if goods are not sold), Price includes Duty, Price includes Brokerage, Price includes Freight, Freight Amount, Contact Information, Owner of Goods, and Buyer and Seller are Related. At the bottom, there are sections for Shipper, Seller, and Manufacturer / Supplier, each with Name, Name 2 Type, and Name 2 fields. A green '+' button is located at the bottom right of the Manufacturer / Supplier section.

As our logins are admin logins over our clients, when we are creating PFI's, CB Customs will pull in as the Company in Header Information. To change to a different client, click on the Icon.

This screenshot shows the 'Header Information' section of the Proforma form. It includes fields for Company (CB Customs Brokerage Ser...), Shipper Reference #, Invoice Date (11/14/2019), Estimated Date/Time A..., State of Destination, Mode of Transportation, Port of Entry, Port Description, Carrier, Master Bill of Lading #, Shipping Quantity, Shipping UOM, Total Gross Weight (KG), Total Gross Weight (Pounds), Invoice Number, and Purchase Order.

Header Information Cont. contains more important information.

This screenshot shows the 'Header Information Cont.' section of the Proforma form. It includes fields for Duty and Fees Billed To, Currency of Value, Terms of Sale, Est. Freight Charges to Destination, Reason for Export (if goods are not sold), Price includes Duty, Price includes Brokerage, Price includes Freight, Freight Amount, Contact Information, Owner of Goods, and Buyer and Seller are Related.

In this mid-section of the “parent document”, under the Header sections, you will find your parties, starting with Shipper, Seller, & Manufacturer / Supplier. Click on **PICK PARTY** (Pick Party) to select a company. Seller and Manufacturer / Supplier have a “Same As” option that allows you to keep the info from the Shipper section as either Seller or Manufacturer / Supplier.

This screenshot shows the 'Shipper', 'Seller', and 'Manufacturer / Supplier' sections of the Proforma form. Each section has fields for Name, Name 2 Type, Name 2, ID (EIN, SSN), Manufacturer ID, Address, City, State/Province, Zip / Postal Code, and Country. At the bottom of each section, there are buttons for 'PICK PARTY' and 'CLEAR'. The 'Seller' and 'Manufacturer / Supplier' sections also have a 'SAME AS SHIPPER' toggle button.

**IMPORTANT: NEVER FREE-FORM A COMPANY. ALWAYS GO TO “PICK PARTY”.**

Moving on to the US parties, you will see the Buyer and Consignee / Deliver To which act just like the freight parties above.

Buyer

Name

Name 2 Type

Name 2

ID (EIN, SSN)

Address

CityState/Province

Zip / Postal CodeCountry

PICK PARTYCLEAR

Consignee / Deliver To

Name

Name 2 Type

Name 2

ID (EIN, SSN)

Address

CityState/Province

Zip / Postal CodeCountry

☒ SAME AS BUYER

PICK PARTY

CLEAR

References (0)

**IMPORTANT: NEVER FREE-FORM A COMPANY. ALWAYS GO TO "PICK PARTY".**

Next to the US parties, you will find References, which are for our client that allows them to enter different information to keep track of what the proforma they are making is for. Clicking the Plus button allows you to add a reference. Lastly, you will find your Lines section, where you add the commodities that are being shipped.

Lines

| <input type="checkbox"/> | Description | Country of Origin | Weight | Tariff | Quantity | Value | Currency |
|--------------------------|-------------|-------------------|--------|--------|----------|-------|----------|
| <input type="checkbox"/> |             |                   | 0      |        | 0        | 0     |          |

Click on the  (Plus Button) to add a new line, or the  (Folder Button) to add a product from the existing database).

Proforma Line Product

Select a Product for the Proforma Line

Company

CB CUSTOMS BROKERAGE SERVICES

Search Product Name / Number / Description...

SEARCH

| Product Code | C. O. | SPI | HTS #        | Description             | MID | Schedule B # | Duty Rate |
|--------------|-------|-----|--------------|-------------------------|-----|--------------|-----------|
|              | CA    |     | 9403.60.8040 | WOODEN OFFICE FURNITURE |     |              | FREE      |
|              | CA    |     | 9403.60.8040 | WOODEN OFFICE FURNITURE |     |              | FREE      |
|              | CA    |     | 9403.60.8040 | WOODEN OFFICE FURNITURE |     |              | FREE      |
|              | MX    |     | 8471.41.0150 | CB COMPUTERS            |     |              | 0.0%      |
|              | MX    |     | 8471.41.0150 | CB COMPUTERS            |     |              | 0.0%      |
|              | MX    |     | 8471.41.0150 | CB COMPUTERS            |     |              | 0.0%      |

Items per page: 10

1 - 10 of 21

<

<


>

>

CANCEL

SELECT PRODUCT

This window will appear after clicking on the folder button to select a product from the product list.

To choose the commodity, click on the line, then click  (Select Product Button) to move on.

This page will appear:

The screenshot shows the Proforma software interface. At the top, there's a navigation bar with 'Actions', 'Templates', and 'Utilities'. Below it, a breadcrumb trail shows 'Folder #12140' > 'Proforma - [Shipper Reference Number]' > 'Line - 1'. The main area is divided into two panels. The left panel, titled 'Line Details', contains fields for 'Line' (1), 'Product Name', 'Part #', 'Description' (WOODEN OFFICE FURNITURE), 'Country of Origin', 'Trade Agreement (SP)' (CA - IF CLAIMING A CANAD...), 'Product Claim Code', 'Gross Weight (KG)', 'Gross Weight (Pounds)', 'Number of Packages', 'Package UOM', a calculation section with 'Quantity', 'Unit Price', 'UOM', and 'Value of Goods', and a 'Notes' section. The right panel, titled 'Classifications (1)', shows a classification: '9403.60.8040 \$0 0 NO DINING TABLES: OTHER WOOD FURN'. Below this, there are three rows for 'Quantity', 'UOM', and 'Value'. At the bottom, there are three sections: 'Buyer', 'Manufacturer / Supplier', and 'Consignee / Deliver To', each with fields for 'Name', 'Name 2 Type', and 'Name 2'. A green plus button is visible in the bottom right corner of the 'Consignee / Deliver To' section.

Be sure to fill in **all** of the following information in Line Details:

- Country of Origin
- Gross Weight
- Number of Packages
- Package UOM
- Qty
- Unit Price

*Gross weight can be entered as KG or LB and both will be auto-calculated*


*To add the value, you must indicate Quantity x Unit Price.  
Be sure to notate quantity at the right if required, whether NO, KG, M2, etc...*

*There is a Notes section that allows you to add misc. info.*


If you are adding a product but meant to pick from your database, click the button in Product Name in the Line Details section.

**Please remember that the following information is MANDATORY:**

- Tariff Number
- Country of Origin
- Quantity
- Value
- Detailed Description

The parties sections all default to the header screen, but can be changed by turning off the  (Same As Button) and selecting a new one by clicking on the **PICK PARTY** (Pick Party Button).

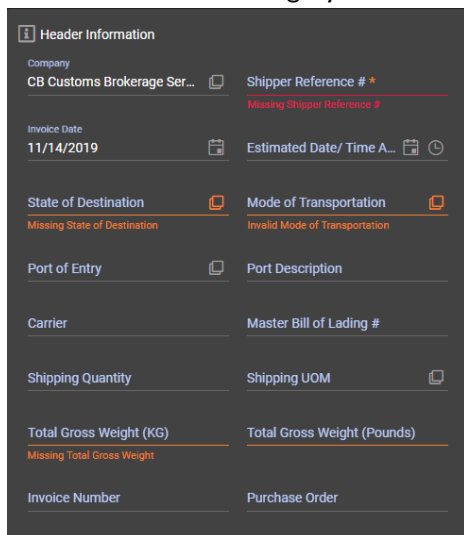
The screenshot shows three sections: 'Buyer', 'Manufacturer / Supplier', and 'Consignee / Deliver To'. Each section has fields for 'Name', 'Name 2 Type', 'Name 2', 'ID (EIN, SSN)', 'Address', 'City', 'State/Province', 'Zip / Postal Code', and 'Country'. At the bottom of each section, there are three buttons: 'SAME AS HEADER' (with a green toggle switch), 'PICK PARTY', and 'CLEAR'. The 'SAME AS HEADER' button is highlighted in green in the 'Buyer' and 'Manufacturer / Supplier' sections, and in blue in the 'Consignee / Deliver To' section.

Once completed filling in all of the information for your line, hover over the  (Plus Button) and you will see: The green arrow button will take you back to the “parent document”. From here, you can continue adding more lines.

**After you have completed inputting information, you must validate, save and post to broker.**

### 1. Validate

To validate, you can either press CTRL + ALT + V, or you can hover over the green plus button at the bottom right hand corner and click on the gray checkmark above it. If there are any issues, you will notice the field will be orange:



**Header Information**

|  |   |
|--|---|
| Company<br>CB Customs Brokerage Ser...                       | Shipper Reference # *<br><i>Missing Shipper Reference #</i>     |
| Invoice Date<br>11/14/2019                                   | Estimated Date/ Time A...<br>[Calendar Icon]                    |
| State of Destination<br><i>Missing State of Destination</i>  | Mode of Transportation<br><i>Invalid Mode of Transportation</i> |
| Port of Entry  | Port Description  |
| Carrier  | Master Bill of Lading #   |
| Shipping Quantity  | Shipping UOM  |
| Total Gross Weight (KG)<br><i>Missing Total Gross Weight</i> | Total Gross Weight (Pounds)                                     |
| Invoice Number   | Purchase Order  |

### 2. Save

Once the PFI has been validated, you can either press CTRL + ALT + S, or you can hover over the green plus button at the bottom right hand corner and click on the orange “Save” button.

### 3. Post To Broker

To post your PFI, simply click the green plus button at the bottom right hand corner.

After the pro forma has been posted, you can click on “Actions” at the top left hand corner to perform the following:

- Print Proforma
- Copy Proforma to New Folder
- Create BOL from Proforma
- Create NAFTA Cerft from Proforma

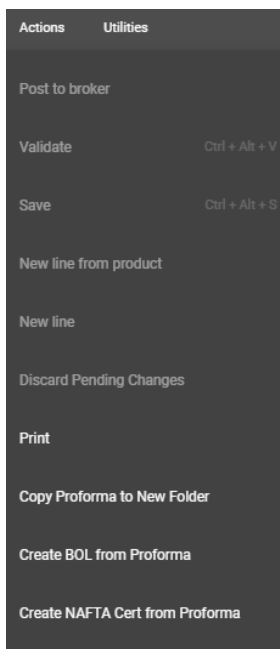
### 4. Print Proforma

After clicking on “Print”, you will see the file come in as a download at the bottom of your window:



### 5. Click on that download

A new window will pop up with a preview of the document. You may now print and/or save the document to your computer.



## CREATING A PROFORMA FROM TEMPLATE



Often times, rather than creating a new pro forma, you can create one based off of another one you've previously created. To do this, you must first find that pro forma.

Within the Proforma module, you can either click on the pro forma in the "Recent Documents" section.


The screenshot shows the Proforma module interface. At the top, there's a navigation bar with 'Actions' and 'Utilities' tabs. Below it, a dropdown menu shows 'Proforma' and 'Dashboard'. The main content area is divided into two sections: 'Templates' and 'Recent Documents'.

**Templates Section:**

| Name                                     | Description   |
|--|---------------|
| + <input type="checkbox"/> template name | template desc |
| + <input type="checkbox"/> template name | template desc |

**Recent Documents Section:**

| Document   | Last Accessed    |
|--|------------------|
| + POSTED, Ref #: 1118201901TEST, Seller: CB CUSTOMS BROKERAGE SERVICES, Consignee: ABC COMPANY, Port Entry: 0106, ETA: N/A | 2019-11-19 13:11 |
| + POSTED, Ref #: 1118201901TEST, Seller: CB CUSTOMS BROKERAGE SERVICES, Consignee: ABC COMPANY, Port Entry: 0106, ETA: N/A | 2019-11-19 12:56 |
| + UNPOSTED, Ref #: N/A, Seller:, Consignee:, Port Entry: N/A, ETA: N/A   | 2019-11-19 12:56 |
| + POSTED, Ref #: 1118201901TEST, Seller: CB CUSTOMS BROKERAGE SERVICES, Consignee: ABC COMPANY, Port Entry: 0106, ETA: N/A | 2019-11-18 14:44 |
| + POSTED, Ref #: test50000, Seller: CB CUSTOMS BROKERAGE SERVICES, Consignee: ABC COMPANY, Port Entry: 0106, ETA: N/A      | 2019-11-18 12:56 |

If it is an older document, click the  button, located at the top left corner of your screen. This button will bring you to the Proforma List.

The screenshot shows the Proforma List interface. At the top, there's a navigation bar with 'Actions' and 'Utilities' tabs. Below it, a dropdown menu shows 'Proforma' and 'Proforma List'. The main content area has a 'Select Filter' dropdown set to 'Last 200'. Below this is a table of proforma entries.

| Proforma Status                   | Company                       | ShipperRefNumber | SBNumber | InvoiceDate             | EstDateArr... | CustomerNumber | StateDest | PortEntry | Car |
|-----------------------------------|-------------------------------|------------------|----------|-------------------------|---------------|----------------|-----------|-----------|-----|
| <input type="checkbox"/> POSTED   | CB CUSTOMS BROKERAGE SERVICES | 1118201901TEST   | 56424508 | 11/18/2019, 12:00:00 AM |               | 1001           | NY        | 0106      | PDE |
| <input type="checkbox"/> UNPOSTED | CB CUSTOMS BROKERAGE SERVICES | testprint        | 88877    | 11/18/2019, 12:00:00 AM |               | 1001           |           |           | ABC |

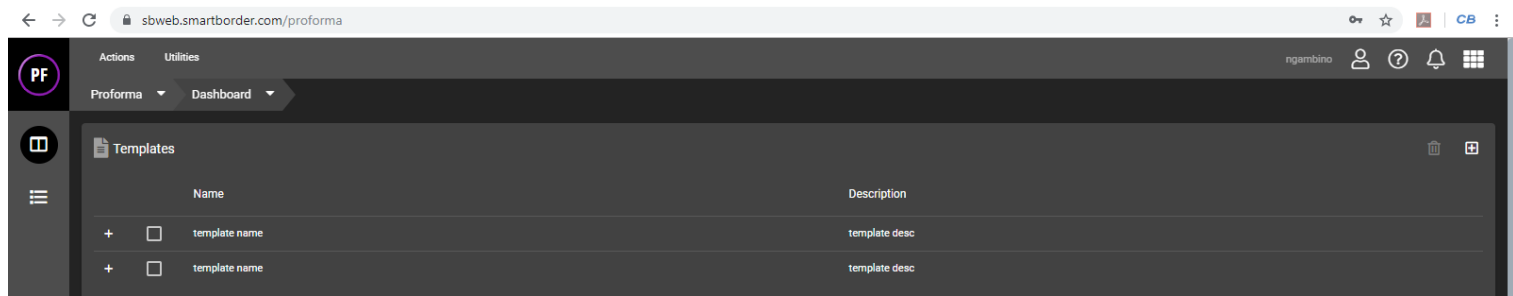
After opening the proforma you're looking to make a copy of, click on "Actions" at the top left of your screen and click "Copy Proforma to New Folder". At this point, you can now create the pro forma as if it is your first time. The only difference is that you must input a new shipper reference number and change any other necessary info. You will also notice in your References section, there will be info there, showing you that you have created this document from a previous pro forma.


The screenshot shows the References section. It has a title 'References (1)' and a list of references. The first reference is 'SB: 56424508'.

| Type               | Reference Number |
|--------------------|------------------|
| SB - SmartBorder # | 56424508         |

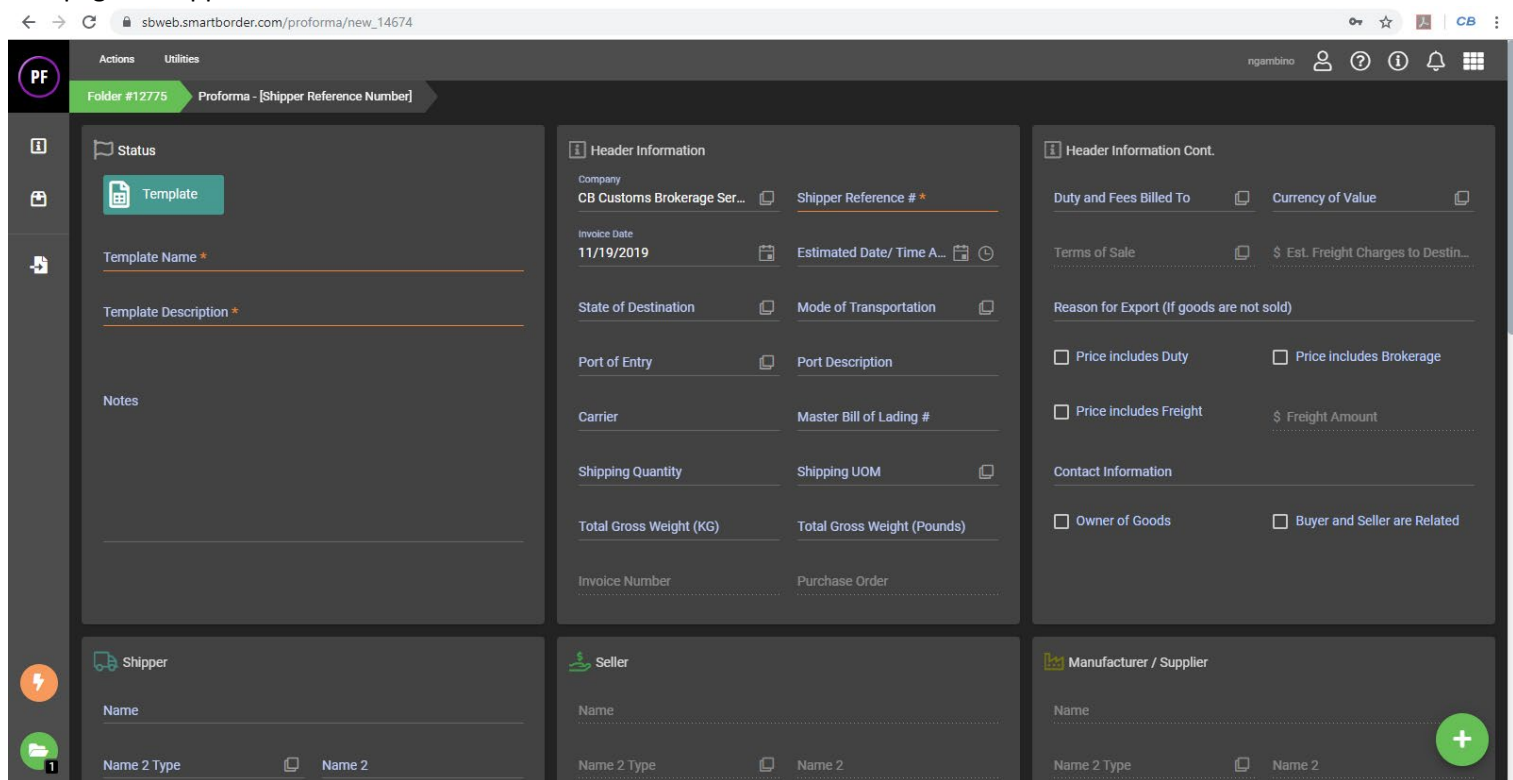
## CREATING A TEMPLATE

On the home page of SB WEB, you will see the Templates section. This allows the user to create a template that can be used to create proformas for re-occurring shipments. This is very handy for shipments that are often almost identical as these will stay at the top of your home page.



Upon your first log in, you should have a couple blank templates. To create a new template, simply click on the blank one, or click on the  (Plus Button).

This page will appear:

A screenshot of the SB WEB application showing the 'Proforma - [Shipper Reference Number]' page. The browser address bar shows 'sbweb.smartborder.com/proforma/new\_14674'. The interface has a dark theme. On the left is a sidebar with a 'PF' logo and a 'Proforma' menu item. The main area is divided into several sections: 'Status' (with a 'Template' button), 'Header Information' (with fields for Company, Shipper Reference #, Invoice Date, Estimated Date/ Time A..., State of Destination, Mode of Transportation, Port of Entry, Port Description, Carrier, Master Bill of Lading #, Shipping Quantity, Shipping UOM, Total Gross Weight (KG), Total Gross Weight (Pounds), Invoice Number, and Purchase Order), 'Header Information Cont.' (with fields for Duty and Fees Billed To, Currency of Value, Terms of Sale, \$ Est. Freight Charges to Destin..., Reason for Export (If goods are not sold), Price Includes Duty, Price Includes Brokerage, Price Includes Freight, \$ Freight Amount, Contact Information, Owner of Goods, and Buyer and Seller are Related), 'Shipper' (with fields for Name, Name 2 Type, and Name 2), 'Seller' (with fields for Name, Name 2 Type, and Name 2), and 'Manufacturer / Supplier' (with fields for Name, Name 2 Type, and Name 2). A green plus button is visible in the bottom right corner.

In the Status section, input your Template Name and Template Description.


To complete the rest of this template, please refer to the CREATE A PROFORMA section of this HOW TO document, as these steps are identical.

After completing, this proforma template will be there on your home page for you to use on future shipments.

## CREATING A BILL OF LADING FROM PROFORMA:



Building off of the previous section, above, you can either create a BOL from within the Pro forma, or you can build a stand-alone BOL.

Click on “Actions” < “Create BOL from Proforma” OR hover over the  (Green plus button) and click the button that says “Create BOL from Proforma”.



The screenshot shows the BOL creation interface. The top bar includes 'Actions' and 'Utilities' tabs, and a breadcrumb trail: 'Folder #12534 > BOL - [BillOfLading]'. The main form is divided into three columns:

- Bill of Lading Information:** Fields include Company (CB Customs Brokerage Ser...), BOL Type, Port of Loading Type, Port of Loading, Port Description, SCAC, Carrier Name, Bill of Lading, Shipper Reference, Service Type, Shipping Date, Declared Value, Currency of Value, Car Initial, Car Number, Trailer Number, Container Number, For Clearance Notify, Route, Charges (Prepaid, Collect), and a green plus button.
- Shipper:** Fields include Name, Name 2 Type, Name 2, Address, City, State, Postal Code, Country, Email, Phone, and a 'Place of Receipt' section with a 'Same as Shipper' toggle.
- Consignee / Deliver To:** Fields include Name, Name 2 Type, Name 2, Address, City, State, Postal Code, Country, Email, Phone, and a 'Place of Receipt' section with a 'Same as Consignee' toggle.

This screen works very similar to the proforma.

### Bill of Lading Information

This close-up shows the 'Bill of Lading Information' section. It includes fields for Company (CB Customs Brokerage Ser...), BOL Type, Port of Loading Type, Port of Loading, Port Description, SCAC, Carrier Name, Bill of Lading, Shipper Reference, Service Type, Shipping Date, Declared Value, Currency of Value, Car Initial, Car Number, Trailer Number, Container Number, For Clearance Notify, Route, Charges (Prepaid, Collect), and a green plus button.

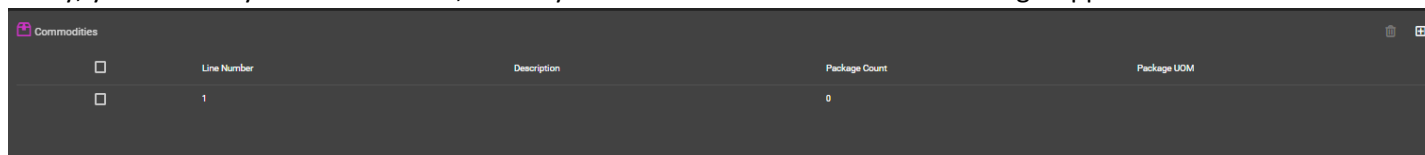
This close-up shows the 'Shipper' and 'Consignee / Deliver To' sections. The 'Shipper' section includes fields for Name, Name 2 Type, Name 2, Address, City, State, Postal Code, Country, Email, Phone, and a 'Place of Receipt' section with a 'Same as Shipper' toggle. The 'Consignee / Deliver To' section includes fields for Name, Name 2 Type, Name 2, Address, City, State, Postal Code, Country, Email, Phone, and a 'Place of Receipt' section with a 'Same as Consignee' toggle. Both sections have 'PICK PARTY' and 'CLEAR' buttons at the bottom.

**Port of Loading Type** section will be “FOREIGN PORT CODE” as the shipment is coming from another country  
**SCAC** section works by either carrier name or the SCAC code  
**Bill of Lading** section is the BOL number


Next to the BOL Info section, you will find your Shipper & Consignee / Deliver To Parties. Click on **PICK PARTY** (Pick Party) to select a company. Consignee / Deliver To has a “Same As” option that allows you to keep the info from above as the Place of Receipt. **WHEN CREATING A BOL FROM PROFORMA, SHIPPER, CONSIGNEE AND LINE INFO WILL AUTO-FILL PER THE INFORMATION YOU ENTERED ON THE PROFORMA.**



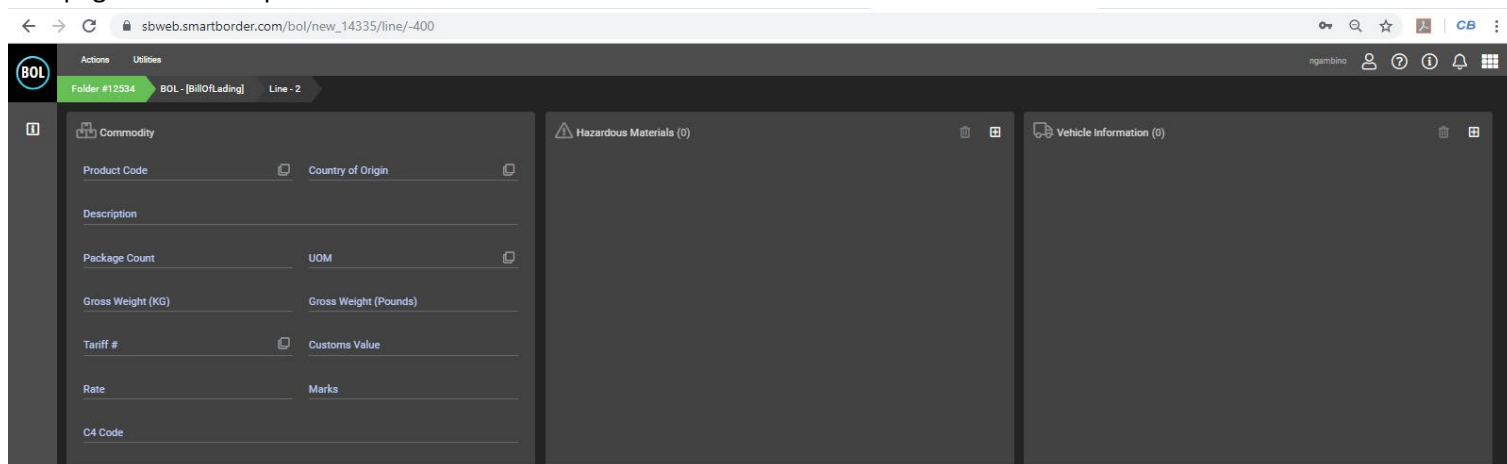
Lastly, you will find your Lines section, where you add the commodities that are being shipped.




|                          | Line Number | Description | Package Count | Package UOM |
|--------------------------|-------------|-------------|---------------|-------------|
| <input type="checkbox"/> | 1           |             | 0             |             |

Click on the  (Plus Button) to add a new line. To edit the lines that are already there from the proforma, simply click on the line, then enter your Package Count and UOM.

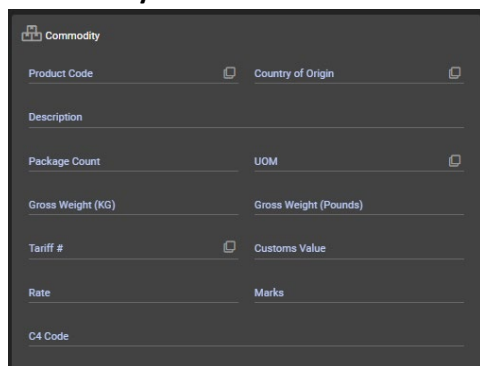
This page will come up:



The screenshot shows the 'BOL - [Bill of Lading] Line - 2' form. It has a left sidebar with a 'Commodity' section containing fields for Product Code, Country of Origin, Description, Package Count, UOM, Gross Weight (KG), Gross Weight (Pounds), Tariff #, Customs Value, Rate, Marks, and C4 Code. The main area is divided into three panels: 'Hazardous Materials (0)', 'Vehicle Information (0)', and a large empty space for additional details.

To select a product from the database, click on the  Icon.

## Commodity Information




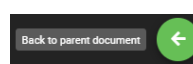
The screenshot shows the 'Commodity' form with fields for Product Code, Country of Origin, Description, Package Count, UOM, Gross Weight (KG), Gross Weight (Pounds), Tariff #, Customs Value, Rate, Marks, and C4 Code.

*The following are required data elements:*

- Detailed description
- Country of origin
- Package count & Unit of measure
- Weight
- Tariff #
- Value

*Gross weight can be entered as KG or LB and both will be auto-calculated*

After all required commodity information has been entered, hover over the  (Plus Button) and click.



**COMMODITY INFO WILL ALREADY BE ENTERED WHEN YOU ARE CREATING THE BOL FROM A PROFORMA.**

**You can now validate, save and print.**

### 1. Validate

To validate, you can either press CTRL + ALT + V, or you can hover over the green plus button at the bottom right hand corner and click on the gray checkmark above it.


### 2. Save

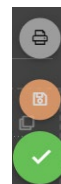
Once the BOL has been validated, you can either press CTRL + ALT + S, or you can hover over the green plus button at the bottom right hand corner and click on the orange "Save" button.

### 3. Print

To print, you can either hover over the  (Plus Button) and click the print button.

The file will download and

 Bill of Lading\_[Bill....pdf] ^



## FROM STAND-ALONE

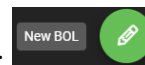


On the home screen, click on “Bill of Lading”

At the bottom right hand corner of the screen, hover over the



(Plus Button) and click.



This screen works very similar to the proforma.

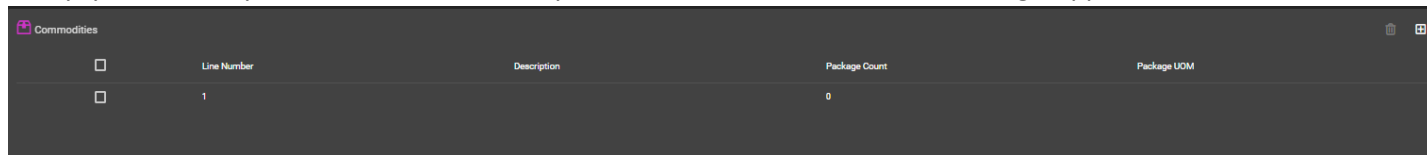
### Bill of Lading Information

**Port of Loading Type** section will be “FOREIGN PORT CODE” as the shipment is coming from another country  
**SCAC** section works by either carrier name or the SCAC code


**Bill of Lading** section is the BOL number

Next to the BOL Info section, you will find your Shipper & Consignee / Deliver To Parties. Click on **PICK PARTY** (Pick Party) to select a company. Consignee / Deliver To has a “Same As” option that allows you to keep the info from above as the Place of Receipt.

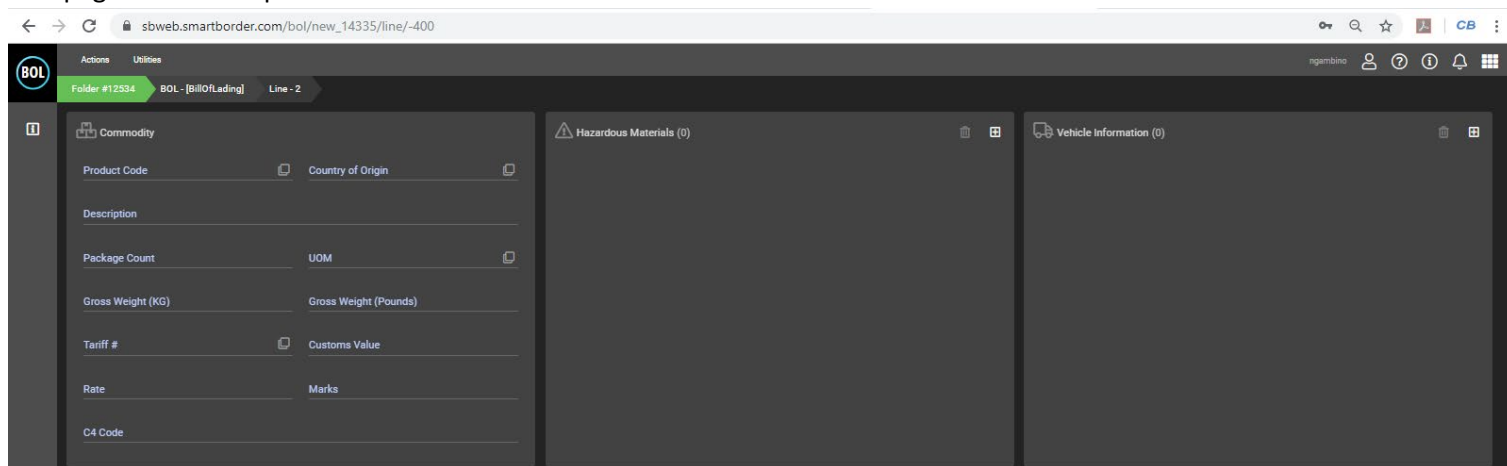
Lastly, you will find your Lines section, where you add the commodities that are being shipped.




| Line Number | Description | Package Count | Package UOM |
|-------------|-------------|---------------|-------------|
| 1           |             | 0             |             |

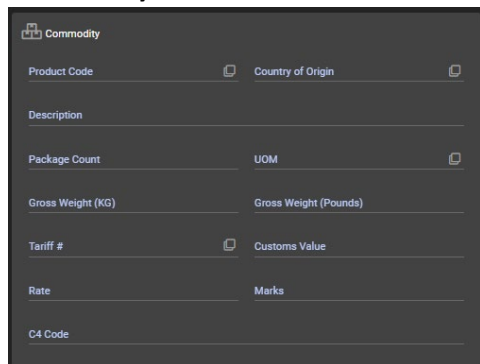
Click on the  (Plus Button) to add a new line.

This page will come up:



To select a product from the database, click on the  icon.


### Commodity Information

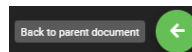


*The following are required data elements:*

- Detailed description
- Country of origin
- Package count & Unit of measure
- Weight
- Tariff #
- Value

*Gross weight can be entered as KG or LB and both will be auto-calculated*

After all required commodity information has been entered, hover over the  (Plus Button) and click.



**You can now validate, save and print.**

#### 4. Validate

To validate, you can either press CTRL + ALT + V, or you can hover over the green plus button at the bottom right hand corner and click on the gray checkmark above it.


#### 5. Save

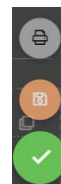
Once the BOL has been validated, you can either press CTRL + ALT + S, or you can hover over the green plus button at the bottom right hand corner and click on the orange “Save” button.

#### 6. Print

To print, you can either hover over the  (Plus Button) and click the print button.

The file will download and

 Bill of Lading\_[Bill....pdf]




# SMART FOLDERS & EVENT HISTORY

## SMART FOLDERS


Smart Folders are the folders that contain the documents pertaining to your shipment. This includes but is not limited to:

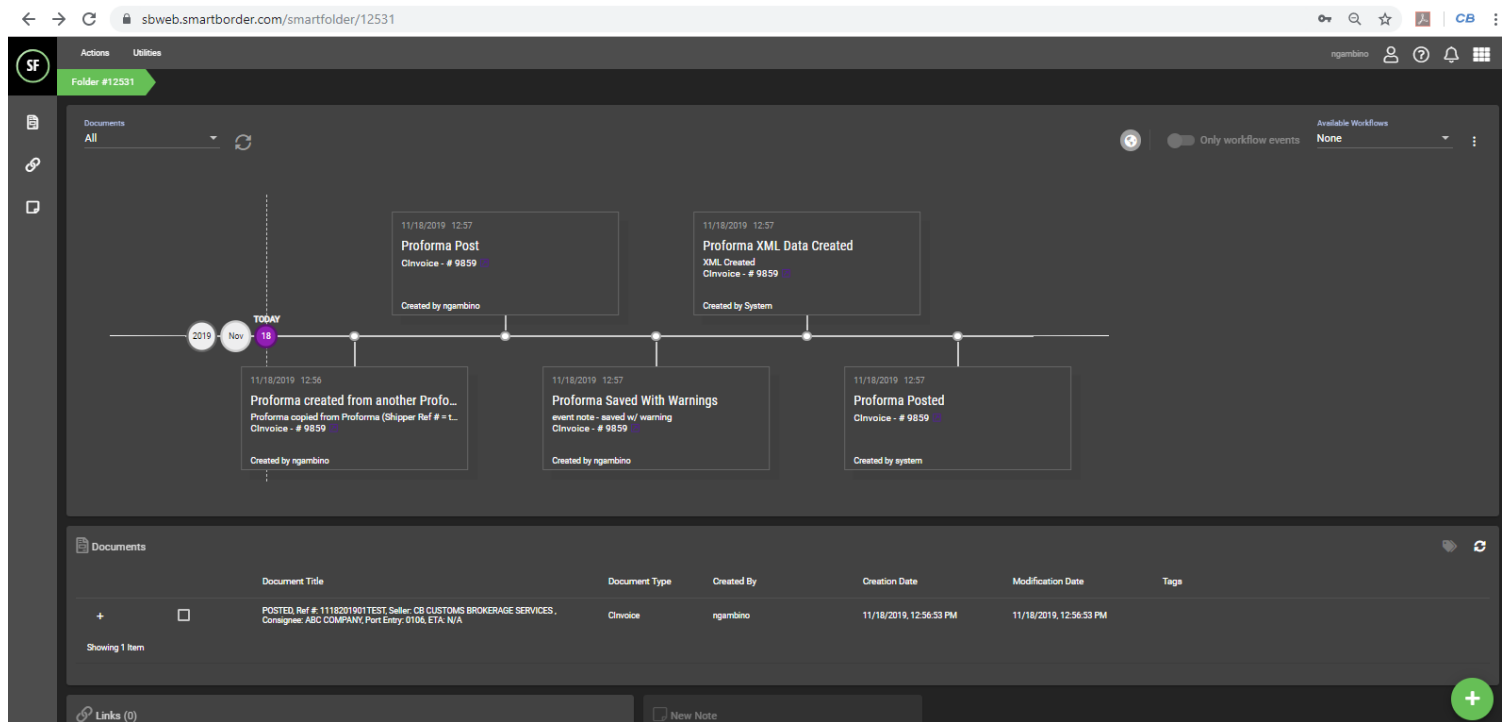
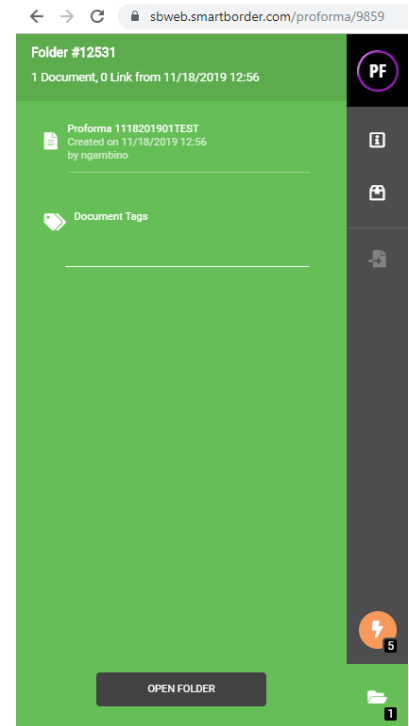
- Pro forma
- BOL
- NAFTA

The  button is the Smart Folder.  
It is located at the bottom left hand side of your screen.

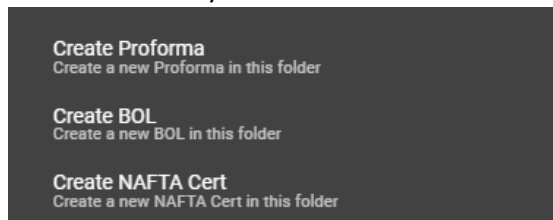
Click “OPEN FOLDER” to open.

These Smart Folders will include a timeline that will show exactly when a document was created, what that document is and who created it. You can access those documents from the “Documents” section.

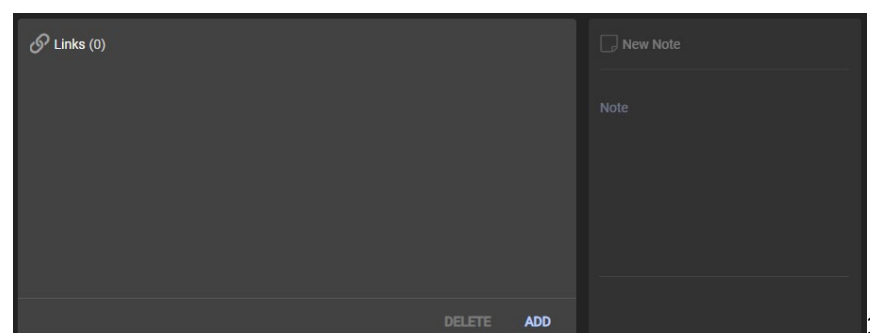
At the bottom right hand corner of your screen, you can hover over the  (Plus Button) to Create a New Document or Move Document to the current folder.



After clicking on “CreateDocument”,  
the below will pop up on your screen,  
which will route you to the correct location:




Finally, you can add links and notes pertaining to this particular shipment:

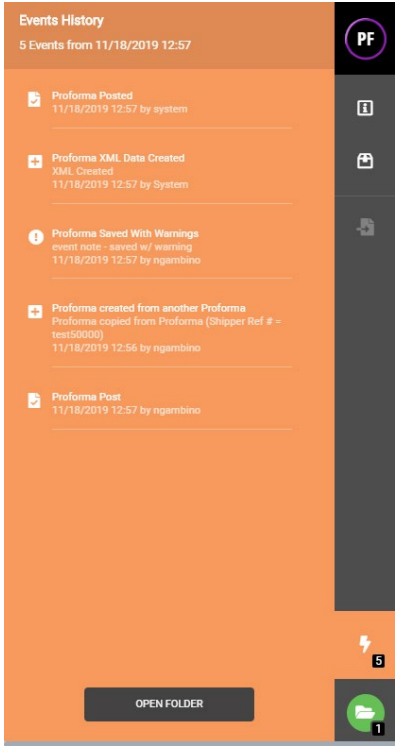


**EVENT HISTORY**

Event history is a great tool to use to see the history of documents created and amended within your Smart Folder for any documents, including the pro forma and BOL WITHOUT having to open the Smart Folder, thus leaving the page you are currently on.

The  button is the Events History.  
It is located at the bottom left hand side of your screen.


Click “OPEN FOLDER” to open.  
This will bring you to the Smart Folder associated with your documents, discussed in the previous section.

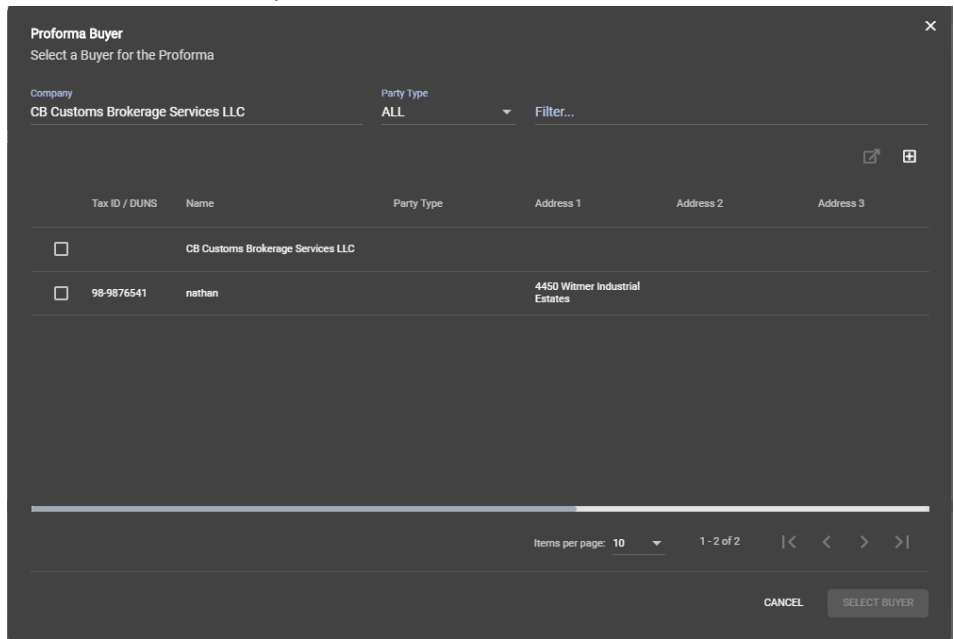


## CREATING A TRANSACTION PARTY

When creating a Proforma, it is **imperative** that all transaction parties your company does business with are in the Smart Border transaction party database. If a company you are sending a shipment to, or a company purchasing an order, is not in your database after clicking “PICK PARTY”, it must be added to the database. Or, every time you set up a new client, you can add from a stand-alone module within SB WEB.

### FROM PROFORMA:

When filling in the Buyer, Consignee, Manufacturer and Seller sections, NEVER manually enter the data. It must always be selected from your database. Click on **PICK PARTY** to select. If you cannot find the company you’re looking for, click the  (plus button) to Create Party.



Proforma Buyer  
Select a Buyer for the Proforma

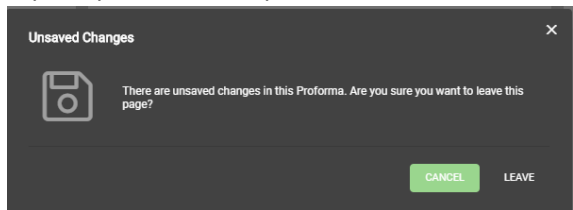
Company: CB Customs Brokerage Services LLC  
Party Type: ALL  
Filter...

| Tax ID / DUNS            | Name                              | Party Type | Address 1                      | Address 2 | Address 3 |
|--------------------------|-----------------------------------|------------|--------------------------------|-----------|-----------|
| <input type="checkbox"/> | CB Customs Brokerage Services LLC |            |                                |           |           |
| <input type="checkbox"/> | 98-9876541                        | nathan     | 4450 Witmer Industrial Estates |           |           |

Items per page: 10 1 - 2 of 2

CANCEL SELECT BUYER

A prompt will come up: Click LEAVE

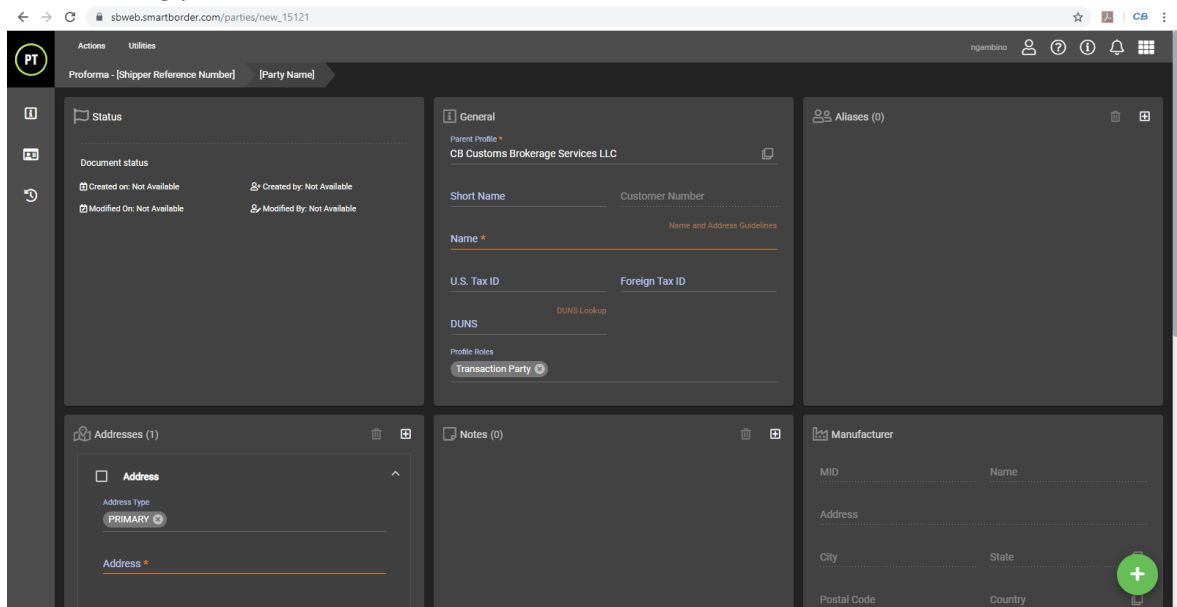


Unsaved Changes

There are unsaved changes in this Proforma. Are you sure you want to leave this page?

CANCEL LEAVE

This will bring you to the Parties Module:



sbweb.smartborder.com/parties/new\_15121

Actions Utilities

Proforma - [Shipper Reference Number] [Party Name]

Status

Document status

Created on: Not Available Created by: Not Available

Modified On: Not Available Modified By: Not Available

General

Parent Profile

CB Customs Brokerage Services LLC

Short Name Customer Number

Name \* Name and Address Guidelines

U.S. Tax ID Foreign Tax ID

DUNS DUNS Lookup

Profile Roles

Transaction Party

Aliases (0)

Addresses (1)

Address

Address Type

PRIMARY

Address \*

Manufacturer

MID Name

Address

City State

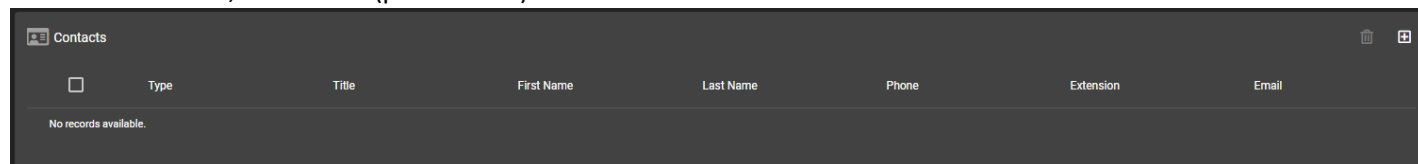
Postal Code Country

+

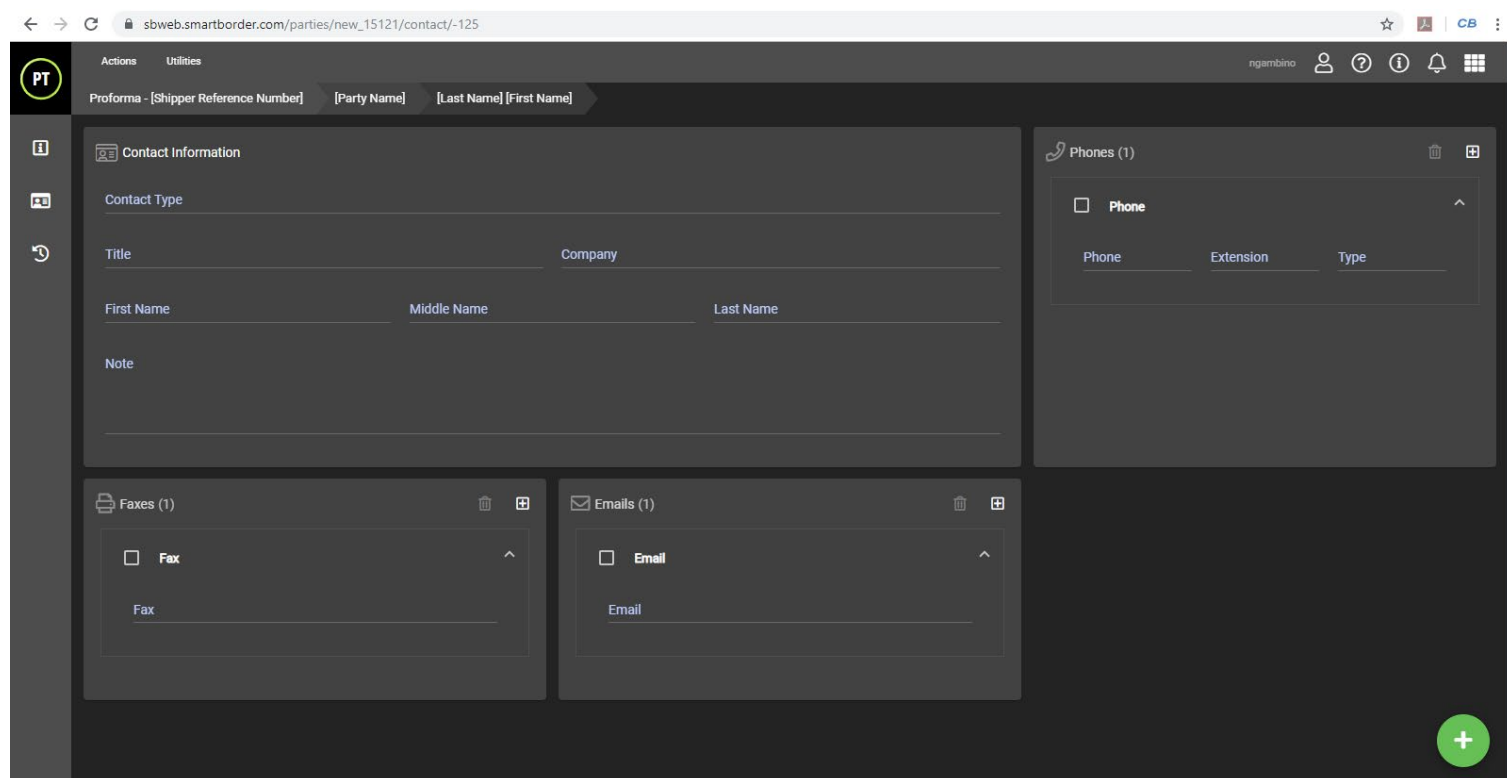
You may now enter in all of the company’s information. Please keep in mind that the below are the **required** datafields:


- Name
- **U.S. Tax ID #**
- DUNS (for FDA’s FSVP purposes only)
- Address
- City
- State
- Postal Code
- Country

To add in contacts, click the  (plus button).



Fill in information as needed:



Click on the  (Green plus button) to go back to “parent document”.

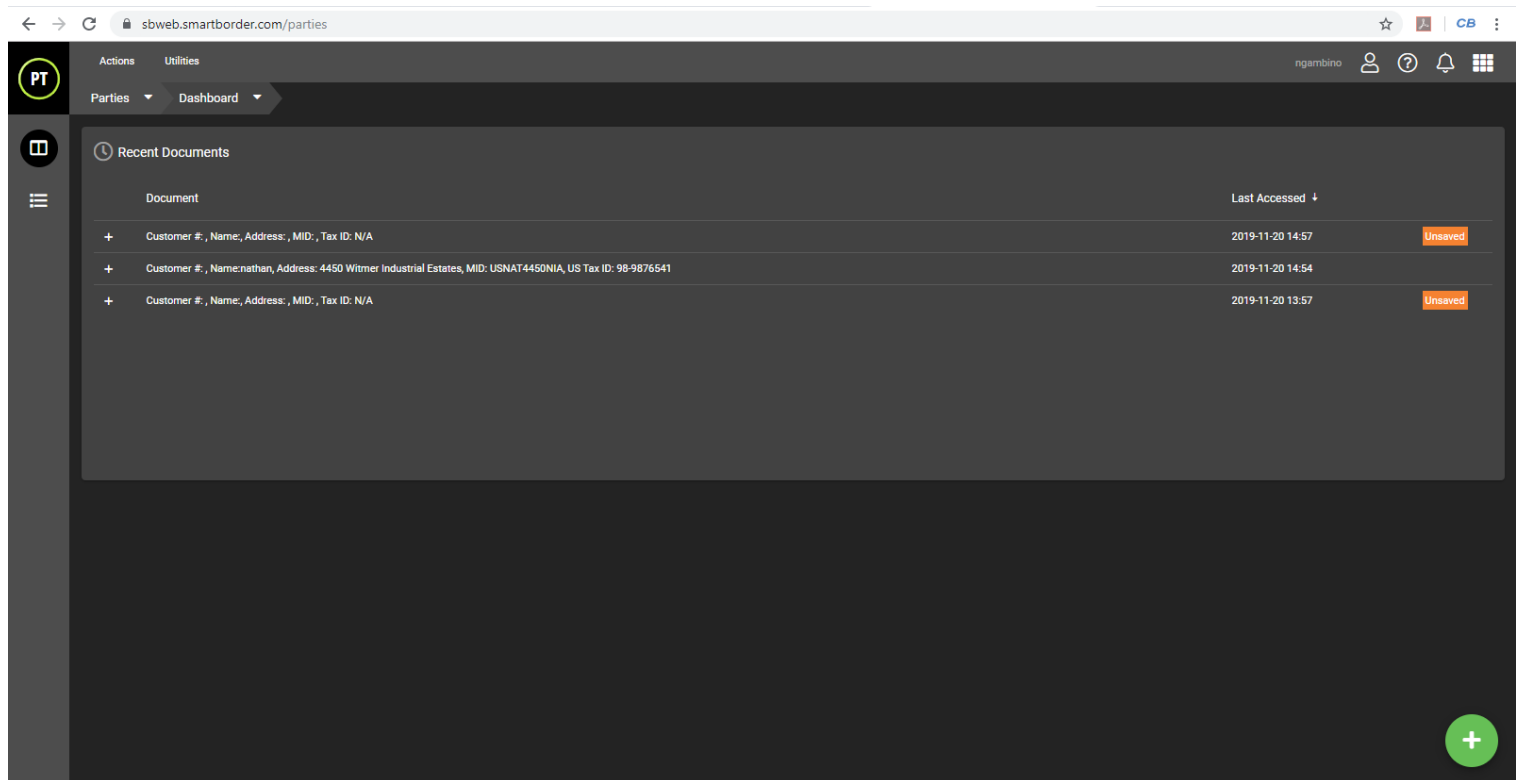
You may now select the party you just created from the grid.

## FROM STAND-ALONE MODULE



Rather than creating a transaction party from within a Proforma, you can create it in advance.

From the home screen, click on PARTIES.




Click the  (Green plus button).


The final step is the only different part than creating from within the proforma. For instructions on creating transaction parties, please refer to pages 13-14.

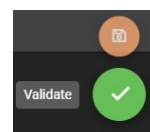
Please keep in mind the **required** datafields:

- Name
- **U.S. Tax ID #**
- DUNS (for FDA's FSVP purposes only)
- Address
- City
- State
- Postal Code
- Country

The final step is validating your work, then saving.  
Validating will show you if any data was entered incorrectly.

At the bottom right hand corner, hover over the  (Green plus button).

Click to validate, then click on the  (Orange save button).






# CREATING A NAFTA

## FROM PROFORMA

Previously, NAFTA certs were only able to be completed either via a fillable PDF document or a Microsoft Word document. SB Web offers the ability to create a NAFTA through the new GUI.

When creating a NAFTA cert from Proforma, you can create from 2 spots:

1. Click on Actions at the top left of the screen, then click on "Create NAFTA Cert from Proforma".
2. Hover over the  (Green plus button) and click the button that says "Create NAFTA Cert from Proforma".

Creating a NAFTA from the Proforma eliminates the amount of work necessary to complete it as info will be auto-filled based off of the data from the proforma.

This is great for creating a Single-Cert NAFTA that only covers the commodities on the Proforma you just created.

If all of the parties are correct (which they should be!), simply go to the Lines section:

Complete the blank fields.

If you are unsure, NAFTA instructions can be found [here](#).

If you are unable to click the link, copy and paste the below address into your web browser:

<https://www.cbp.gov/sites/default/files/assets/documents/2017-Apr/CBP%20Form%20434.pdf>


It is CBP Form 434, page 2.

Feel free to contact us if you have any further questions.

FROM STAND-ALONE MODULE

To be completed at a later date

From the home page, click on “NAFTA Cert”



sbweb.smartborder.com/naftaco/new\_15312

NAFTA

Actions

Templates

Utilities

Folder #13213

NAFTA Cert - [Title]

Status

Document status

Created on: Not Available

Created by: Not Available

Modified On: Not Available

Modified By: Not Available

Box 11 Information

Company

CB Customs Brokerage Ser...

Name

Title

Telephone

Fax

Date

Blanket From

Blanket To

Exporter

Name

Tax Identification Number

Address

City

Zip

Country

State / Province

PICK PARTY

CLEAR

Importer

Name

Tax Identification Number

Producer

Name

Tax Identification Number

Lines (0)

Box 11 Information

Exporter

Importer

Producer

Lines

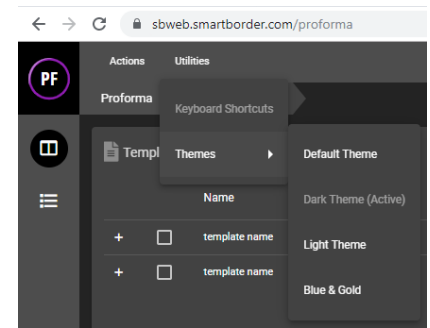
## **IMPORTING AN EDI FILE**

*To be completed at a later date*

## CUSTOMIZING THE GUI

SB WEB offers some customization to users. You can change the theme of your Graphic User Interface by performing the following steps:

- Within any module in SB WEB, click on “Utilities” at the top left of the screen.
- Hover over themes
- Pick the theme you wish to use



### CREATED BY:

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Niagara Falls, NY 14305

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Website: [www.cbcustomsbrokerage.com](http://www.cbcustomsbrokerage.com)

