

# End User Guide (Create Commercial Invoice)

Createch 365

**Microsoft Partner**  
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## Version history

Version	Date	Revision Description	Prepared by
1.0	2016-12-09	First Version	The Createch group
2.0	2017-05-04	Benoit Migneault (modified version)	The Createch group

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## Objective User guide

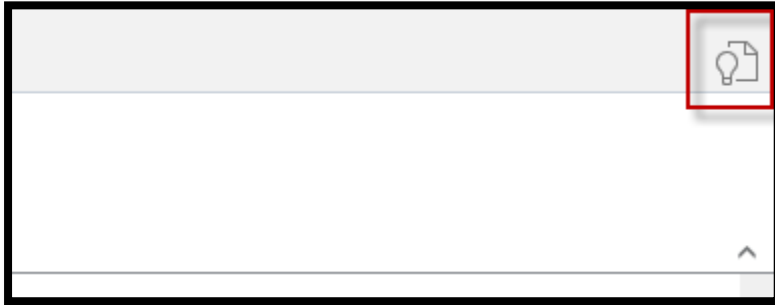
The objective of this user guide is to present the step to print and send the commercial invoice

1. Update the information of the item card to show it on the commercial invoice
  - Net Weight (Inventory section)
  - Gross Weight (Inventory section)
  - Tariff No. (Price and Posting section)
  - Country/Region of Origin Code (Price and Posting)
  
2. Enter information of the Commercial Invoice (based on Posted Sales Shipments)

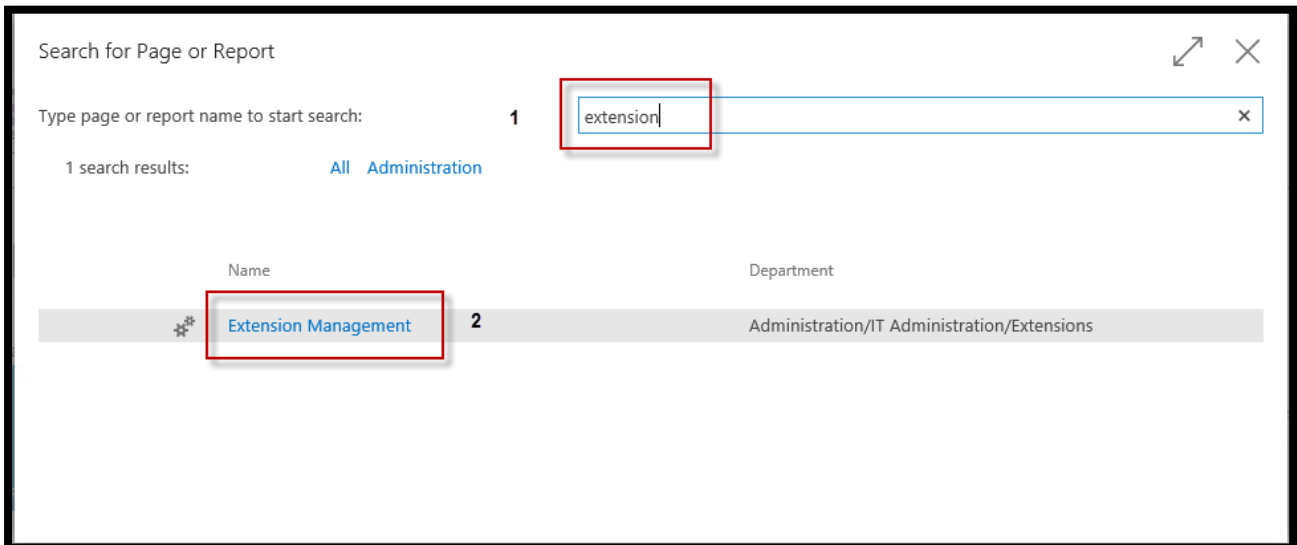
## 1. Installation of the extension

Before using the app in Dynamics 365, please make sure if the extension is installed. You can follow these steps:






- Click on the search function from your home page



- The search page opens:
  - 1- Enter extension in the search bar
  - 2- Select the related item



The extension management page opens:

HOME		ACTIONS	
			
View	Install	Uninstall	Open in Excel
Details	Manage	Learn More	Page
			
	Refresh		

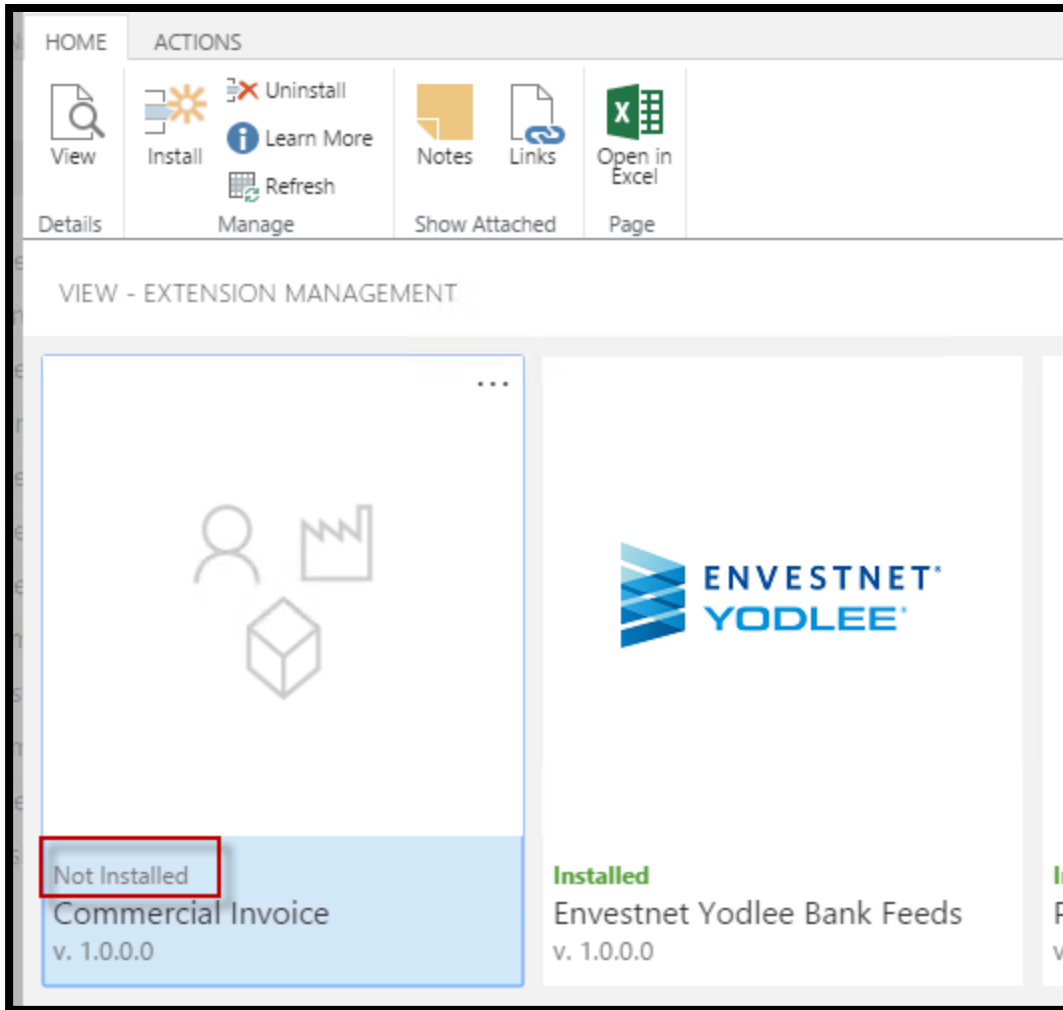
  

VIEW - EXTENSION MANAGEMENT		
AdditionalInfo	Name	Version
... Not Installed	311_ Créatech - EXI-147 - Quick Sales Documents	v. 1.0.0.0
... Installed	Automatic Customer Statement	v. 1.0.0.0
... Installed	Commercial Invoice	v. 1.0.0.0
... Installed	Envestnet Yodlee Bank Feeds	v. 1.0.0.0
... Installed	Estimation Tool	v. 1.0.0.0
... Installed	Managing Customer Status	v. 1.0.0.0
... Installed	PayPal Payments Standard	v. 1.0.0.0
... Installed	QuickBooks Data Migration	v. 1.0.0.2
... Installed	Sales and Inventory Forecast	v. 1.0.0.0

If the status of the related extension is installed, the extension is correctly installed.

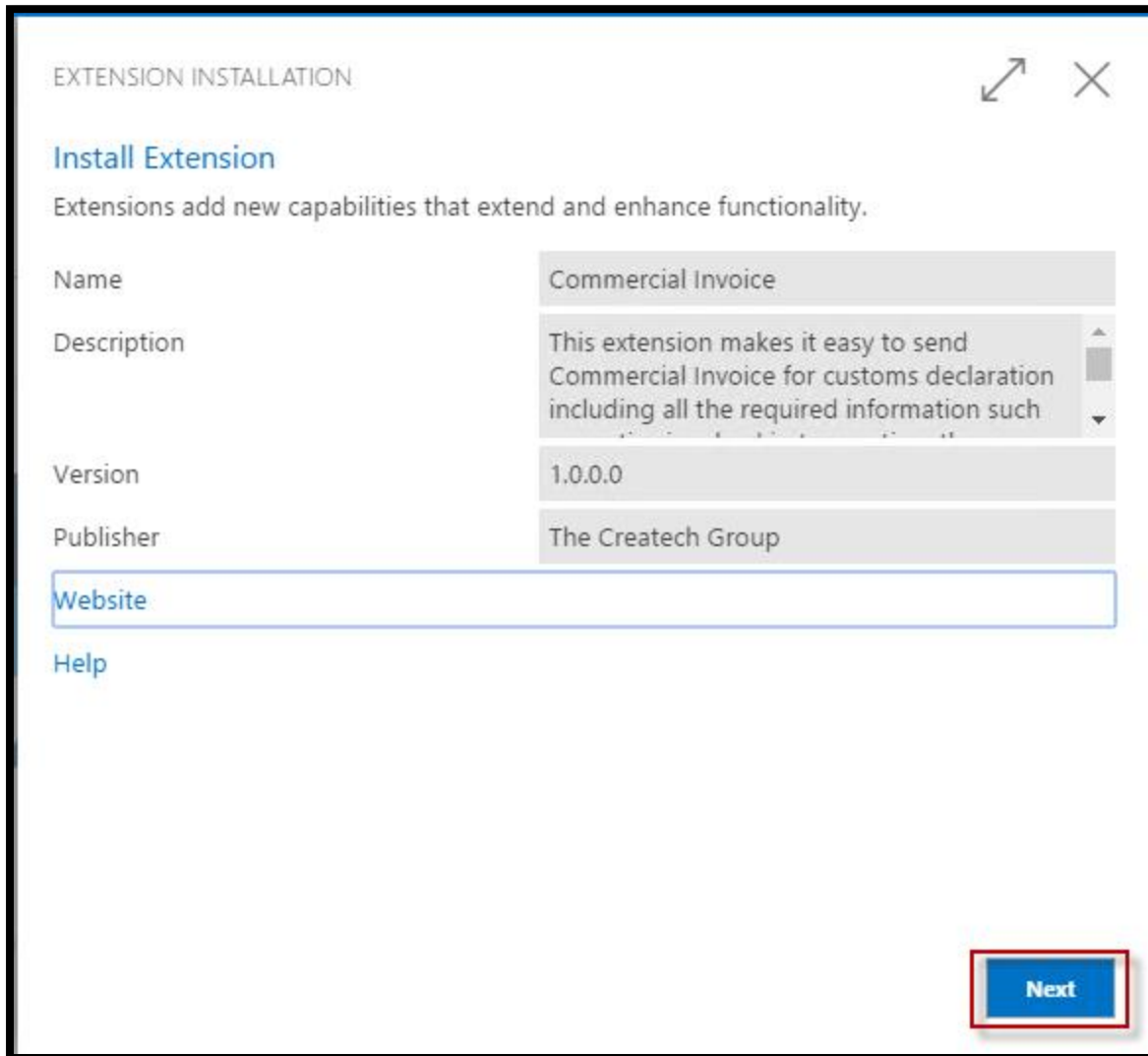
If it is Not Installed, you can:

- Click in the extension called "Commercial Invoice"



The Extension Installation Wizard opens:

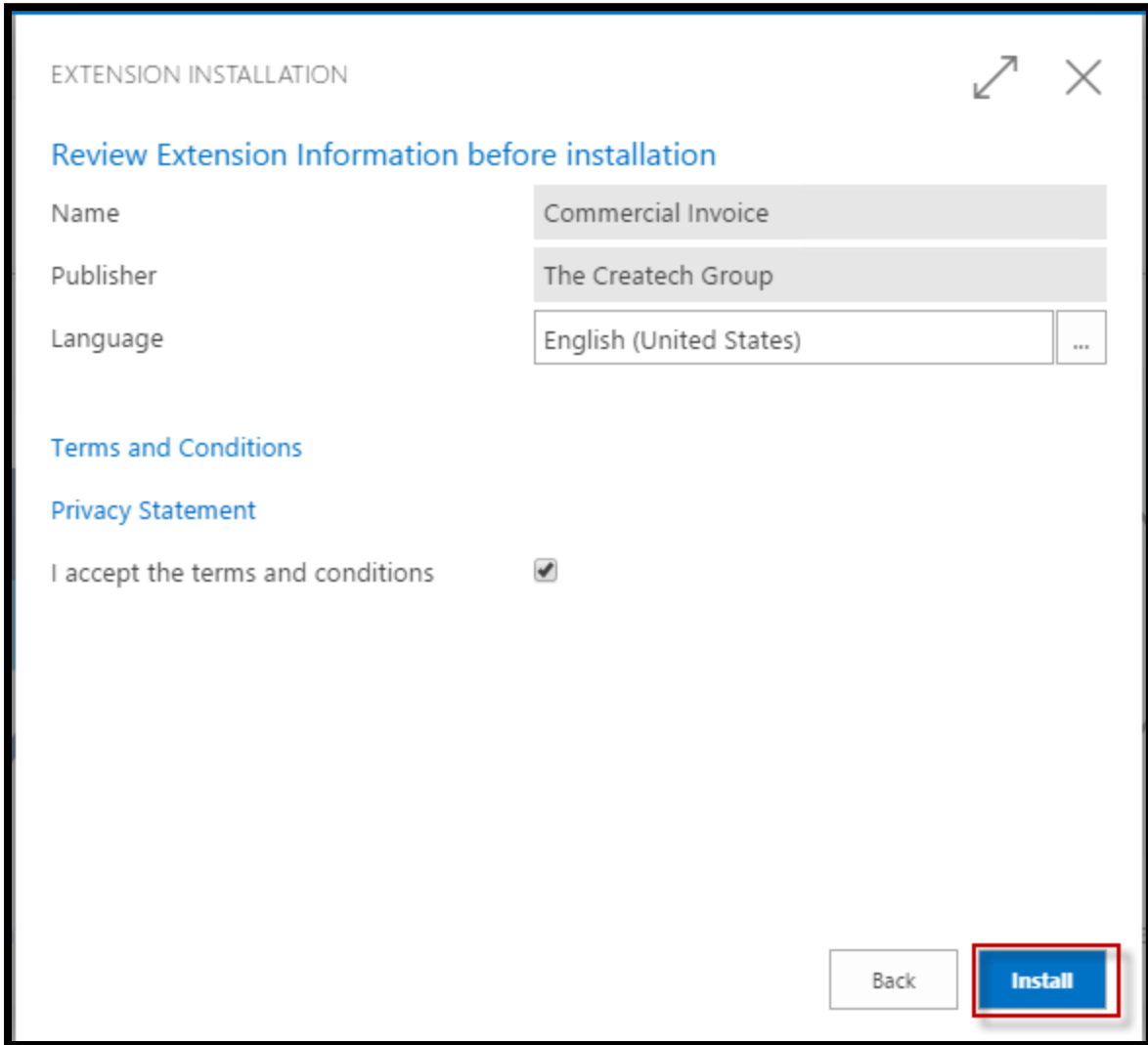
- Click on Next



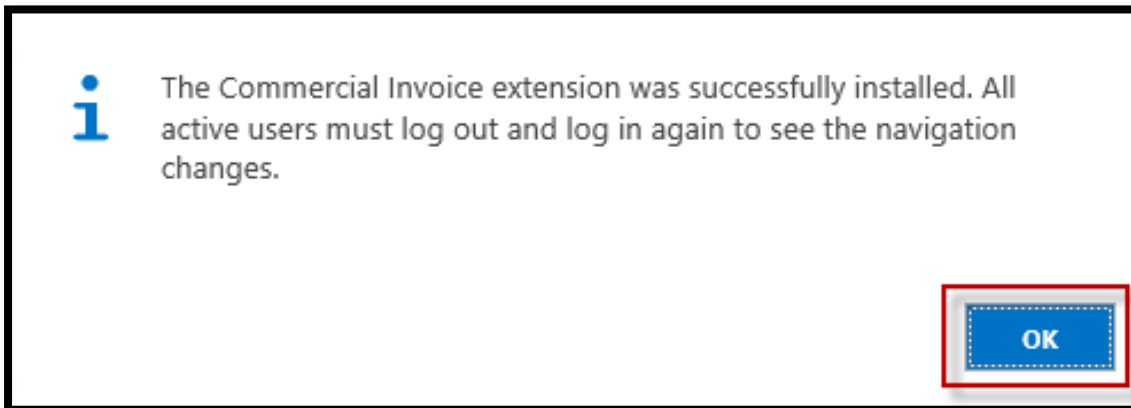
The next step of the wizard opens:



- Click on Install



Click on Ok.



The extension is correctly installed.

## 2. Update the information of the item card to show it on the commercial invoice

This section describes the steps to update the information of the item card

- Net Weight (inventory section)
- Gross Weight (Inventory section)

EDIT - ITEM CARD

1896-S · ATHENS Desk

Item > PCS

Inventory Show less

Inventory	81 >	Net Weight	34.6
Qty. on Assembly Order	0	Gross Weight	39.79
Qty. on Asm. Component	0	Unit Volume	1.2
Stockout Warning	Default (Yes)	SAT Item Classification	...
Prevent Negative Inventory	Default (No)		

Costs & Posting >

- Tariff No. (Item section)
- Country/Region Purchased Code (Item section)

EDIT - ITEM CARD

1896-S · ATHENS Desk

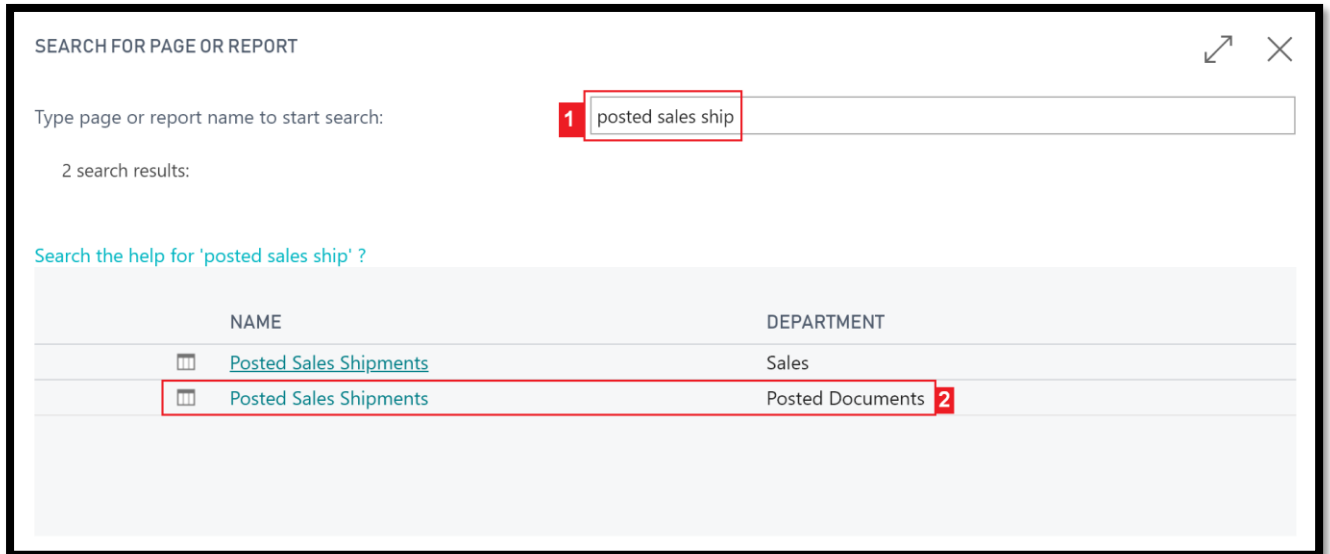
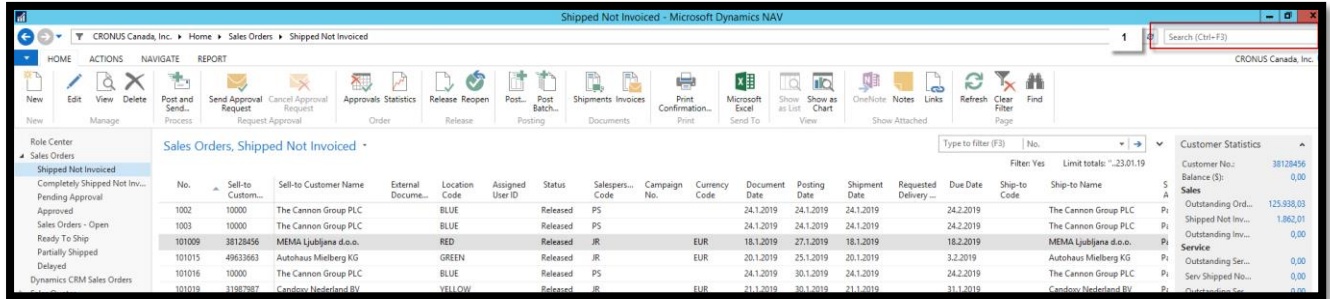
Item Show more

Description	ATHENS Desk	Base Unit of Measure	PCS
Blocked	<input type="checkbox"/>	Item Category Code	TABLE
Standard Margin %	0	Tariff No.	90 90 90 90
Estimated	8	Country/Region Purchased Code	CA
Type	Inventory		

### 3. Create Commercial Invoice based on Posted Sales Shipment

The creation of the Commercial Invoice is done on the Posted Sales Shipment. The button is on the Rubban in the Process Tab Home

1. Go to the search bar and enter **posted sales ship**.
2. Select the second one.



3. Select your Posted Sales Shipment (for example S-SHPT102031) and click on the menu **Commercial invoice**

The screenshot shows a software interface with a menu bar at the top. The menu bar has four tabs: HOME, ACTIONS, NAVIGATE, and REPORT. Under the ACTIONS tab, there are icons for Edit, View, Delete, Print..., Commercial Invoice..., and Open in Excel. The 'Commercial Invoice...' option is highlighted with a red box, and a red '3' is placed below it. Below the menu bar, there is a section titled 'VIEW - POSTED SALES SHIPMENTS'. This section contains a table with three columns: NO., SELL-TO CUSTOMER NAME, and LOCATION COD. The first row of the table is highlighted in light blue and has a red box around it. The first row contains the values: S-SHPT102031, ..., Alpine Ski House, and a red '3' in the LOCATION COD column. The other rows in the table are: S-SHPT102030, Relecloud; S-SHPT102029, School of Fine Art; and S-SHPT102028, Adatum Corporation.

NO.	SELL-TO CUSTOMER NAME	LOCATION COD
S-SHPT102031	...	Alpine Ski House
S-SHPT102030	Relecloud	
S-SHPT102029	School of Fine Art	
S-SHPT102028	Adatum Corporation	

4. Create the Commercial Invoice by selecting the options based on the Sales Shipments
  - a. Enter the Transportation Cost
  - b. Enter the Insurance Cost
  - c. Enter the No. of Parcel
  - d. Enter the information of the Sender
    - i. Original Sender
    - ii. Sender Address
    - iii. Sender Telephone
  - e. Enter the Reason for export:
    - i. Sale
    - ii. Repair
    - iii. Inter-Company
  - f. Enter the Brokerage and Duty Charges Billed To:
    - i. Consignee
    - ii. Shipper
    - iii. Other (specify in the **Brokerage Other** field)
  - g. Enter if the Parties are Related or Not Related
  - h. Enter the Country of manufacture of the final items



### Saved Settings

Name  ...

### Options

Number of Copies

Print Company Address

Print Package Tracking Nos.

Log Interaction

Transportation Cost

Insurance Cost

No. of Parcel

Original Sender  ... >

Sender Address

Sender Tel.

Reason for Export  ▼

Brokerage and Duty Charges Bille...  ▼

Brokerage Other


**PARTIES TO THIS TRANSACTION ARE (CHECK APPLICABLE BOX)**

Related

Not Related

Country of manufacture  ...

Here is an example of the printed commercial invoice

<b>Commercial Invoice</b>								
				Commercial Invoice No		S-SHPT102031		
Tax ID No. Related				Date		03/21/17		
<b>Delivery Address</b>			<b>Bill To Address</b>			<b>Seller Address</b>		
Alpine Ski House 110 - 9th Avenue SW, 8th Floor Calgary CA T2P 0T1			Alpine Ski House 110 - 9th Avenue SW, 8th Floor Calgary CA T2P 0T1			CRONUS Canada, Inc. 220 Yonge St Toronto CA M5E 1G5		
Buyer PO No.				Seller SO No.				
Expected Receipt Date				Shipping Date 07/03/18				
Currency				Selling Term COD				
Place of Loading				Payment Mode CASH				
Transport Company				Mean of Transport				
Reason for Export		Brokerage and Duty Charges Billed To			Parties to this transaction are:		Country of manufacture	
Sale		Affiliated			Related		Canada	
Item No.	Description	Qty	No. of Parcel	Country of manufacture	Net Weight	Gross Weight	Unit Price	Total Price
1960-S	ROME Guest Chair, green	2	2	Canada	8.3	9.55	289.60	579.20
						<b>Transportation Cost</b>		200.00
						<b>Insurance Cost</b>		1,000.00
						<b>Grand Total</b>		1,779.20
<b>Original Sender</b>								
Financials User Montréal								
				<b>Telephone</b>		514-514-5145		
				<b>Signature</b>				