



The International Trade Compliance Experts Since 1879

Electronic Forms Library Documentation

Software for Exporters Version 2.2.7

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Welcome to Unz & Co.'s Electronic Export Forms Library

About EFL

The Unz and Co. Electronic Forms Library (EFL) is a stand-alone, single user, Windows-based program designed to help you manage and print export forms. The program is a very low cost "pay as you go" alternative to larger and more expensive offerings. You can purchase a license key which allows you to print a certain number of additional forms whenever you need more.

The program can save information about your buyers, products, consignees etc. You can save your transactions so that you can recall them later, copy them, and process new transactions based on a previous one. This saves you time and money processing your export transactions.

Installation

- 1) Place the CD in your CD drive.
- 2) On the Windows desktop click on "Start".
- 3) Then click on "Run".
- 4) In the dialog box, type in the designation of your CD drive followed by a colon, then a back slash, then the word "setup". (For example: D:\setup). Click on "OK".
- 5) The setup routine will now begin to run.

We recommend that you accept all default prompts. A dialog box will pop up to tell when setup has successfully been completed.

Note:

- *This software is a single workstation application.*
- *This application is not designed for, nor will it function on a network server.*
- *The current version of this software is not compatible with MS Access 2000.*

Before You Begin

You must obtain an EFL License key. **Call Unz & Co. Customer Service at 800-631-3098.** The key will enable you to print 250 forms. Our representatives can talk you through this very simple process.

Getting Started

To run the application, at the Windows desktop click on "Start", then place your mouse pointer on "Programs". In the Programs menu, you will find a folder titled "UNZform". Place your mouse pointer on UNZform folder and then click on "UNZform" in the sub-menu.

The application's main menu window will be displayed.

Running the Program

The main menu has five major buttons:

- **Trade Documents** Allows you to enter new transactions
- **Global Files** Allows you to complete your master lists
The lists will contain entries that are used in the drop-down lists throughout the program
- **Order History** Lets you see a record of the orders you have placed for license keys
- **Forms Inventory** Lets you see how many forms you have used or have left to print
- **Order Forms** Lets you order new license keys



Global Files

First click on the Global Files button.

You will be presented with a menu of global lists maintained by the application. The files are used to store the information that appears in the drop-down boxes throughout the program. This saves you time typing when entering new transactions.



To work in a particular file, double click on the name. Alternatively, data can be entered into these files "on the fly" while you are completing a form. However, for the file titled "Items", we recommend that you enter data for your products by opening this file and working within it rather than "on the fly."

Hint: Once you have entered new data or amended data in these Global Files, click on the "Update" button to save it. To immediately enter a second record, click on "Update" then click on the "New" button.

Global Files / Items

In the Global File titled "Items", the first data field is titled "Item ID Number". This is your company's product identification number. It must be a unique identifier for the particular product being entered. You can use numbers and letters to enter the product ID. This data field does not print on any form.

Hint: If the Item ID Number is your part/SKU number and you want this number to be printed on a form, you must also enter your part/SKU number in the data field titled "Commercial Description".

We strongly recommend that you go to [Global Files / Items](#) and complete the database entries for an item first, rather than trying to do this on an input screen for a particular form.

The Items File includes the following fields:

Title of input fields	Data that goes into the field
Item ID Number	A unique identifier for the item; the item's part number or stock number; whatever way a company identifies the product; this is an alphanumeric field
Commercial Unit/Measure	However the company sells the item. Each or Lb. or Kg. or barrel or box or whatever
Commercial Price/Unit	May be left blank. <i>On the consensus of many users, we have disabled this field of data since prices so often change from transaction to transaction. This data is now to be manually entered on data input screens for forms.</i>

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Sched B/HTUSA/ NAFTA Unit/Measure	The unit of measure reporting quantity as found in the far-right hand column of the Schedule B associated to the Schedule B tariff number and description. This statistical reporting quantity may be different than the unit of measure by which the company sells the product.
Sched B/HTUSA/ NAFTA Price/Unit	May be left blank. <i>On the consensus of many users, we have disabled this field of data since prices so often change from transaction to transaction. This data is now to be manually entered on data input screens for forms</i>
Commercial Description	The way a company describes its product. The way they would represent their product on a commercial invoice.
Sched B/HTUSA/ NAFTA Description	The description of the product as found in the Schedule B or HTS associated to the proper classification number. The tariff description may differ from the commercial description.
NAFTA Origin Basis	This is the NAFTA Preference Criterion. The input would be A, B, C, D1, D2, E, or F as appropriate to the way the company determined the product qualified under NAFTA.
NAFTA Producer	This is a "Yes" or "No" question. Did you produce/manufacture the product? If yes, the input YES; otherwise input NO. If input is NO, then you must follow the NO with either the number 1, 2, or 3. "1" means you have knowledge that the product is NAFTA eligible; "2" means you have some written evidence from the producer that the product is NAFTA eligible;"3" means that you have a NAFTA Certificate of Origin from the producer evidencing NAFTA eligibility.
NAFTA Net Cost	This is a "Yes" or "No" question. Did you need to use the Net Cost formula under Regional Value Content to qualify the product under NAFTA? If you did not use Net Cost formula, the input is NO. If you did, the answer is NC or YES.
NAFTA Country of Origin Code	This is the NAFTA country of origin of the product. US is United States; MX is Mexico; CA is Canada.
SB/HTUSA Code 10 digits	This input field wants the 10 digit tariff classification code found in either the Schedule B or the HTS. It looks like 10 digits won't fit but they will. (<i>The U.S. no longer uses an 11th digit - once called the check digit.</i>)
HS/NAFTA Code 6 digits	This input field wants only the first six digits of the tariff classification code described above.

Global Files / Principal Parties

Below is a view of the entry screen for one of the data files for principal parties such as Buyers, Sellers, and Exporters etc. Most of the global files are similar in appearance and function.

Hint: the Name and Address1 fields are required, and must be completed in order to save your entry

These fields are for your reference and do not appear on any forms

The screenshot shows a web-based form titled "Exporters". It is divided into two main sections: "General Information" and "Contact Information".

General Information:

- Name: Exporter 1
- Address1: 3 Exporter Lane
- Address2: New Orleans, La
- Address3: (empty)
- Address4 (5-digit Zip Code): 99999
- EIN: 1111111111-1

Contact Information:

- Name: Mary Exporter
- Phone #: 444-444-4444
- Fax #: 444-444-4444
- E-Mail: mary@myspace.com

Notes: my nopte

Toolbar (Right Side):

- New (with house icon)
- Delete (with trash can icon)
- Close (with plus sign icon)

Bottom Bar: Record: 1 of 1, navigation arrows, No Filter, Search

Complete the fields on the left side of the screen. These fields are used in drop-down boxes.

The area to the right side of this input screen, titled "Contact Information" does not print on any form. It is simply a user placeholder where you may input additional data about the particular contact. The "Notes" field is a clear text field where you can enter any optional data. This field also does not print on any form.

Hint: To save data you have entered or modified, click on the "Close" button. To immediately enter a second record, click on "Update" then click on the "New" button.

Working with Forms

From the main menu, select the button "Trade Document" and see a sub-menu of the various documents available in this application.



Click on the form you want to process. The screen on the next page will be displayed.

Select a form already generated or a new blank form.

Unique ID	Consignee	Date Created
10	American Importers Inc.	4/15/2009

View Highlighted Form	New Form
Copy Highlighted Form	View Form - All Records
Delete Highlighted Form	Finished

To return to main menu click "Finished"

Copy a Form

If you have export shipments that may go to the same customer at the same destination with the same, or substantially the same products, you may quickly create a form by copying a previous transaction and editing only those fields of data that have changed. Once you have selected from the main menu the form you want to create, the screen shown below will be displayed. Highlight the previous transaction you want to copy then click on the "Copy Highlighted Form" button.

You will be presented with an input screen that is a copy of the transaction you highlighted. Make any changes necessary to reflect the current shipment. A new Unique ID number will be assigned once the new transaction is saved.

Completing your Forms

Below is a sample view of a partially completed form input screen.

To populate the input screen with items, place cursor in "Item" field and single click. You will then get a drop down menu of items stored in that database file.

Any data fields with arrow buttons provide drop down menus where you can click on a record maintained in one of the global database files. Full addresses will print on the form.

Buttons:

- **"Done"** saves your work.
- **"New"** gives you another blank form so you can continue to work without going through the previous menus.
- **"Notes"** provides a non-printing, clear text data field where you can enter any notes you may care to record about this transaction.
- **"Print Draft"** lets you preview your forms. You can always see a screen preview of a form before it goes to the printer. You may exit the preview screen without printing the form and there will be no decrease to your electronic inventory.

Hint: Anytime you wish to preview a form, whether you are completing it or for one last look before printing it, use the "Print Draft" button. If you use the "Print Final" button, even just to preview a form, your forms inventory will be decreased by one unit!

Certain forms have mandatory data fields that must be completed before the form will print.

- The Shipper's Export Declaration and the Shipper's Letter of Instruction must have the "Exporter", "Intermediate Consignee", "Ultimate Consignee", "Forwarding Agent", and at least one "Item" entered on the form input screens.

Hint: Transactions don't always involve an Intermediate Consignee. In Global Files/ Intermediate Consignees database file, create a record where the "Name" and "Address I" fields contain the word "None". Then use this record when there is no Intermediate Consignee.

- Canada Customs Invoice requires that the "Importer/Consignee" and "Purchaser" fields on the form input screen have data in them.

Hint: If the Purchaser is the same as the Importer/Consignee you may enter the word "Same" in the Purchaser field. In Global Files / Purchaser database file create a record where "Name" and "Address I" fields contain the phrase "Same as Importer."

Printing your Forms

Nafta Certificate Of Origin

Exporter: National GenEx Inc. Blanket Period (mm/dd/yy) From: 1/1/2005 To: 12/31/2005

Producer: Manufacturer Inc. Importer: American Importers Inc.

Item	Item Description	Tariff Class #	Preference Criterion	Producer
23456	descr	n/a	n/a	n/a
*				

Record: 1 of 1 No Filter Search

Company: United Products Ltd Name: John Warren

Phone: 999-999-9999 Fax: 888-888-8888 Title: Logistics Manager

USA Print Draft Print Final Canada Print Draft Print Final Mexico Print Draft Print Final

Delete New Done Notes

16-768E UNZ & CO. INC. 700 CENTRAL AVE., NEW PROVIDENCE, NJ 07974 (800) 631-3098

Record: 1 of 1 Unfiltered Search

To print your forms, click on the Print Final button. The final copy will be sent to the printer and your "Forms left to print" counter will be reduced by one.

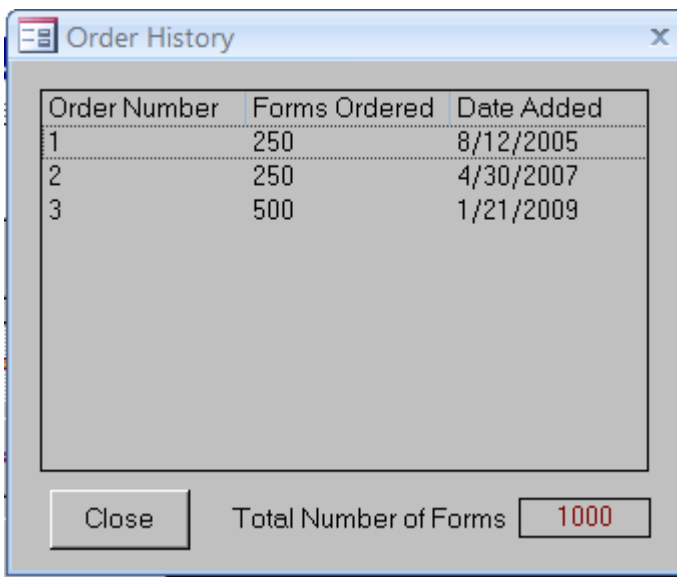
Getting More Forms

Ordering more forms for your Export Forms Library is easy. Just call the Unz & Company Sales desk at 1-800-630-3098 and ask them for a new **EFL license key**. You can order more forms in groups of 250, 500, or 1000.

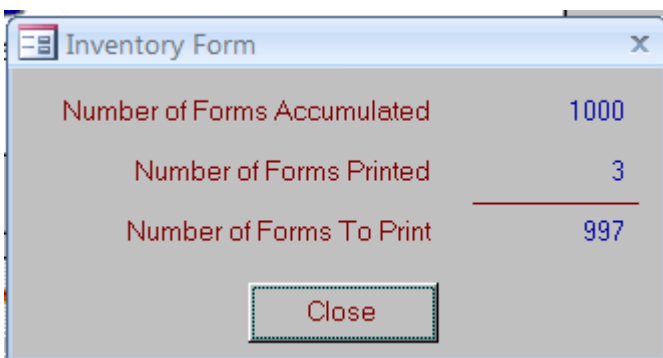
You can manage your forms inventory with the three buttons on the upper right hand corner of the EFL main screen. The buttons are:

- Order History
- Form Inventory
- Order Forms

The Order History buttons allows you to see all of the previous orders and dates that you have placed for your EFL forms



The Forms Inventory buttons allows you to see exactly how many forms you have printed, and how many you have left to print before you must reorder a new license key.



The Re-Order Forms buttons records the information needed for you to place an order for new forms.

License Form

Please call 1-800-631-3098 to reorder additional Unz and Co. electronic export forms. Have your credit card ready to process the order online today.

Your Order Number: 4

Enter License Key Here

See License Terms Below

Number of Forms Accumulated

Number of Forms Printed

Number of Forms to Add

Number of Forms after Addition

Apply License

Cancel

- 1) Call the Unz Sales desk at the number on the screen above
- 2) Ask them for an EFL license key
- 3) Tell the sales representative the RED number in the "Your Order Number" field
The sales representative will generate a new key and give it to you in an email for your records
- 4) When you receive the new license key, enter it in the "Enter License Key Here" box
- 5) Press the "See License Terms Below" button to update your forms inventory