VISUAL IMPORTER: CLIENT PORTAL NAVIGATION

▶ Visual Importer: Client Portal Navigation

This guide will discuss in detail how to navigate the 3 below tabs in Visual Importer:

1. **First Tab: Shipment or Client Portal**
   a. How to view, access and print all Canada customs brokerage transactions submitted by Frontier.
2. **Second Tab: ARL Tab**
   a. How to view, access and print the Canada Border Services Agency (CBSA) Daily Notice (DN) and Statement of Account (SOA) for all importer's activity, upon EDI application.
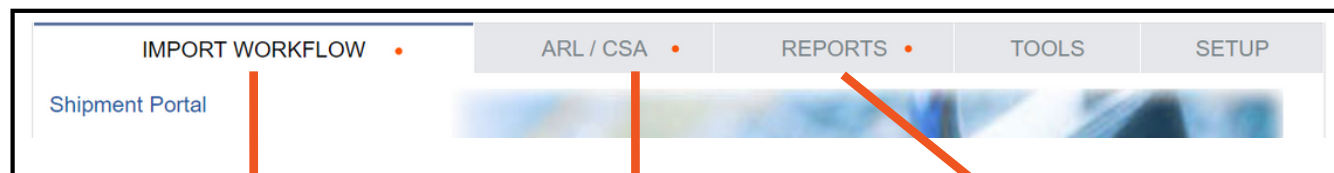3. **Third Tab: Reports Tab**
   a. How to generate real time VI Audit Report and view and/or retrieve a detailed listing of Frontier submitted Canada customs brokerage transactions by each product.

▶ Home Screen for Client Login:

▶ Three Tabs Along the Top:

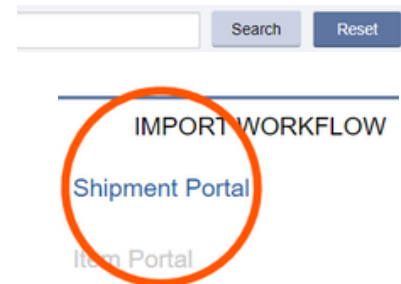| 1.	2.	3.
Shipment or Client Portal: Shipment List	**ARL: CBSA DN & SOA**	**Reports: VI Audit Report**

VISUAL IMPORTER: SHIPMENT OR CLIENT PORTAL

▶ First Tab: Shipment or Client Portal

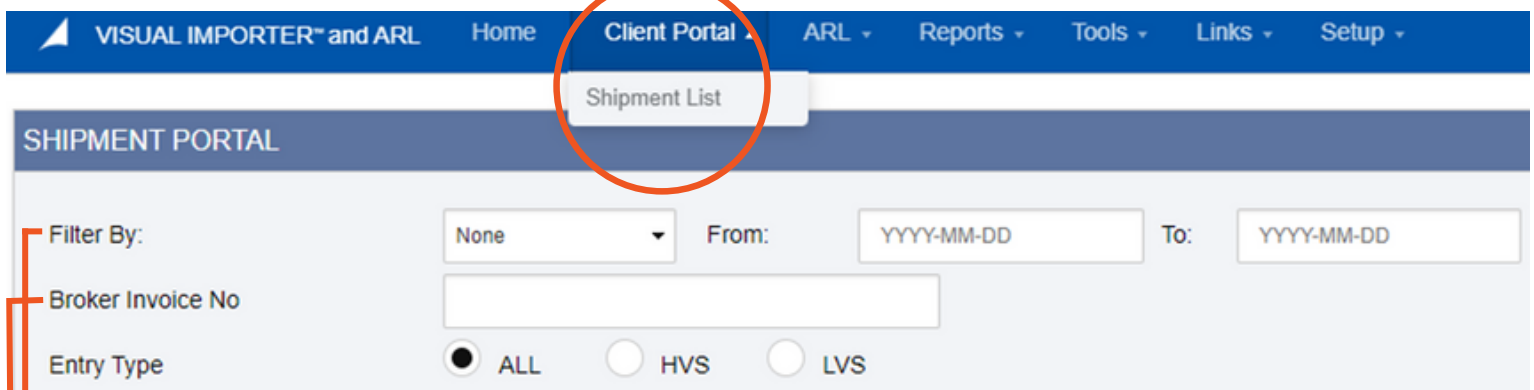The first tab allows you to view all Canada customs brokerage transactions submitted by Frontier.

▶ Navigating the Client Portal

From the main menu select "Shipment Portal" under the Import Workflow section. Note, you can use the **search bar** to search by: filter criteria, CBSA transaction number, or leave blank.

From "Shipment Portal", select "**Shipment List**" that appears in the "Client Portal" dropdown menu. Once you are in the module, This tab includes all Canadian Customs brokerage transactions submitted by Frontier.

Client Portal - Shipment List

Filter by Date filter based on Invoiced, released or (K84) confirmed

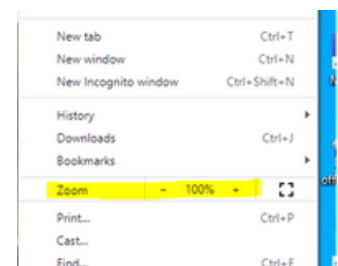**Broker Invoice No.** Allows you to search by Frontier billing invoice number

▶ Printing CBSA Attachments

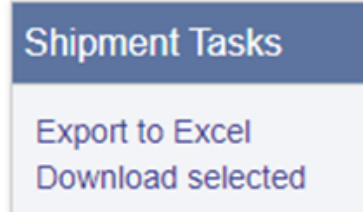In the far right-hand corner of the screen, use the "**Shipment Tasks**" box.

*Zooming in your Screen

If you cannot see the the "Shipment Tasks" option, try decreasing your program zoom percentage as shown in the image to the right until it is in view. A good rule of thumb is 80/85%.

▶ **First Tab Continued: Shipment or Client Portal - Shipment Tasks**

Shipment Tasks

Export to Excel
Download selected

▶ **Export to Excel**

This feature allows you to export lists of transactions based on search criteria. It includes reference numbers, Value for Duty, Duty and GST. You can download the spreadsheet which gives you a list of transactions with additional information including: invoice numbers, PO number, VFD, GST & Duty amounts and carrier.
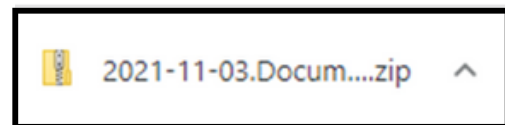
▶ **Download Selected**

This feature gives you access to imaged documents including Frontier's billing invoice, B3 forms, and release shipment supporting documents. (As shown below).
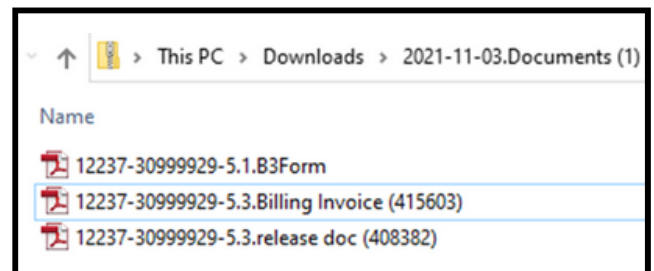
1. Select the image documents you require:

LVS Form : ✔
LVS Worksheet : ☐
LVS Identifiers Summaries : ☐

B3 Form : ✔
Recap Sheet : ☐

Attached Documents : ✔

Ok   Cancel

2. Download it as a zip file

📁 2021-11-03.Docum....zip ∧

3. Find the PDFs under downloads.

↑ 📁 > This PC > Downloads > 2021-11-03.Documents (1)

Name

📄 12237-30999929-5.1.B3Form
📄 12237-30999929-5.3.Billing Invoice (415603)
📄 12237-30999929-5.3.release doc (408382)

To view an example of a Frontier Billing Invoice sample or a Shipment List Export sample click the links below:

▶ **Frontier Billing Invoice Example**   ▶ **Shipment List Export Example**

VISUAL IMPORTER: ARL/CBSA TAB

▶ Second Tab: ARL/CBSA

The second tab gives access to Canada Border Services Agency (CBSA) Daily Notice (DN) and Statement of Account (SOA) for all importer's activity, upon EDI application.

▶ Under the following, you will find:

Account Summary
- ○ Dashboard that summarizes CBSA transactions
- ○ Month-to-date summary, average per entry, transactions by port and filer.
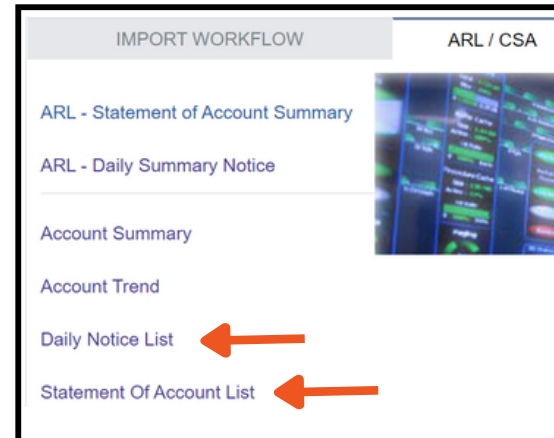
Account Trend
- ○ Bar charts of monthly amount and for each tax.

Daily Notice List
- ○ Daily Notice (DN) - All CBSA transactions confirmed per day.

Statement of Account List
- ○ Statement of Account (SOA) – monthly summary by day with total payable.

▶ How to Retrieve CBSA's DN & SOA:

1. **Use the search bar to search by transaction number:**

2. Click on Statement Date to view each individual CBSA's DN or SOA.

To open a document please select the Statement date link which will **open a PDF** in your browser. Please note that your browser must have pop-ups enabled on the site to retrieve your documents.

3. Selecting the date(s)

Select one, multiple, or all on the page

4. Export to Excel [Export to Excel]

After you have selected the dates you want, you can export the files to Excel. In the top right-hand corner of the screen, select the "Export to Excel" button.

5. Viewing Additional Records

You can scroll down the page to view more pages of reports using the buttons shown below.

To view an example of a Daily Notice (DN) and/or a Statement of Account (SOA) click the link(s) below:

▶ **Daily Notice (DN) Example**   ▶ **Statement of Account (SOA) Example**

▶ Third Tab: Reports

The third tab allows you:

- Generate real time VI Audit Report
- View and/or retrieve a detailed listing of Frontier submitted Canada customs brokerage transactions by each product, including consign information, part numbers and description
- Filter by date ranges
- Export to Excel

REPORTS ●

To view an example of an audit report click the link below:

▶ **Audit Report Example**