Custom Document Settings

Module Guide: Customs Document Settings

Module Location

Utilities > Customs Document Settings

Module Purpose

The **Customs Document Settings** module is used to define and manage the master data for customs document types related to the company's import-export processes. This ensures that all customs transactions comply with regulations, are well-documented, and are easily traceable by document type and status.

1. Main View (List of Customs Document Types)

View Explanation

- **Customs Document Types Table**:
  - **Customs Type Code**: The national code or number for the customs document (e.g., BC 2.6.2, BC 2.3).
  - **Customs Type Detail**: A detailed description or explanation of the document's use (e.g., "Ex Subcon, Ex Loan, Ex Repair", "Import, Re-import").

    - **Customs Document Type**: Indicates whether the document is for **IN** (inbound to the country/warehouse) or **OUT** (outbound).

    - **Customs Type Status**: An indicator of whether the document is active or not, usually shown as a checkmark (active) or a cross (inactive).

- **Action Buttons**:

    - **New**: Opens the form to add a new customs document.

    - **Change Status**: Modifies the active/inactive status of a selected document.

2. Add/Edit Customs Document Page

View Explanation

- **Customs Document Code**: An input field for the customs document's short code or name (e.g., BC 2.6.2).

- **Customs Document Detail**: A text area for entering a detailed description of the document's purpose.

- **Document Type**: Radio button selection for **IN** or **OUT** to indicate the document's function.

- **Document Status**: Radio button selection for **Active** or **Inactive** based on the document's usage status in the system.

3. Steps for Adding/Managing Customs Documents

- Navigate to **Utilities > Customs Document Settings**.

- Click **New** to add a new document, or select a document from the list and click **Change Status** to activate/deactivate it.

- Fill in the **Customs Document Code** and **Customs Document Detail** according to regulatory requirements.

- Select the **Document Type** (IN/OUT).

- Set the **Document Status** to **Active** if it is to be used, or **Inactive** if it is for archival/historical purposes only.

- Click **Save** to store the data.

4. Integrated Workflow & Business Process

- **Mandatory Reference for Customs Transactions**: Every import-export transaction in the system must use a code and document detail from this master data to be valid according to customs requirements.

- **Control and Compliance Reporting**: This master data serves as the primary reference for compliance reports, audits, and customs reconciliations.

- **Process Logic**: The distinction between **IN** (inbound) and **OUT** (outbound) transactions will be clearly maintained, allowing each logistics process to automatically adapt the required legal supporting documents.

5. Tips & Important Notes

- Always ensure the customs document types are updated if there are changes in government regulations.
- Define the descriptions clearly so that users without a customs background can still select the correct document when inputting transactions.
- Managing active versus inactive documents is important to ensure that new transactions only use currently valid customs documents.
- Access to this feature should be restricted to tax/customs staff or compliance administrators.

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