



Electronic billing system. Invoicing Web CFDI 4.0

User guide

Complement Foreign trade

April 2022

Versión CFDI 4.0

Pinnacle reviews

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Facture hoy		
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FACTURA360 WEB USER BILLS CFDI WEB 4.0

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1. ACCESS TO THE SYSTEM

In order to access the system Factura360 need to register at the following address:

<https://cfdi360.com/admin/#/login>

Fill in the fields Registration module, click on the box to accept the Terms and Conditions. Then press the "Send" button.

Note: Please fill out the RFC field with capital letters, without spaces or dashes.



The screenshot shows the registration form for Factura360. The form is titled "Registro" and includes the following fields:

- Nombre completo o Razón social *
- RFC (Favor de capturarlo con mayúsculas y sin ...)
- Correo electrónico *
- Nombre de usuario *
- Contraseña *
- Confirmar contraseña *
- CURP

There are red 'x' marks next to the RFC and Nombre de usuario fields, indicating they are required. At the bottom of the form is a button labeled "REGÍSTRATE".

Note: username and password, please do not include words with accents or special characters like ñ or spaces as this could cause the system does not allow access. If permitted symbols such as #, \$, %, &, /, _ etc.

If the data is correct, the system will send a message that the information has been stored properly.

Please check the inbox of the email provided in the registry. You can see your login to the system

Estimado(a) **SERVICIOS DE ASESORIA EN SISTEMAS ZURITA SA DE CV**

Este correo te lo hemos enviado porque te has suscrito a nuestro portal de Factura360.

Información de usuario

Usuario: usuario@factura360.com
Contraseña: 12345680]

Por favor, utilice el enlace de abajo para obtener más información sobre cómo utilizar el sistema. Factura manual de usuario

Gracias
Administración Factura360
www.factura360.com

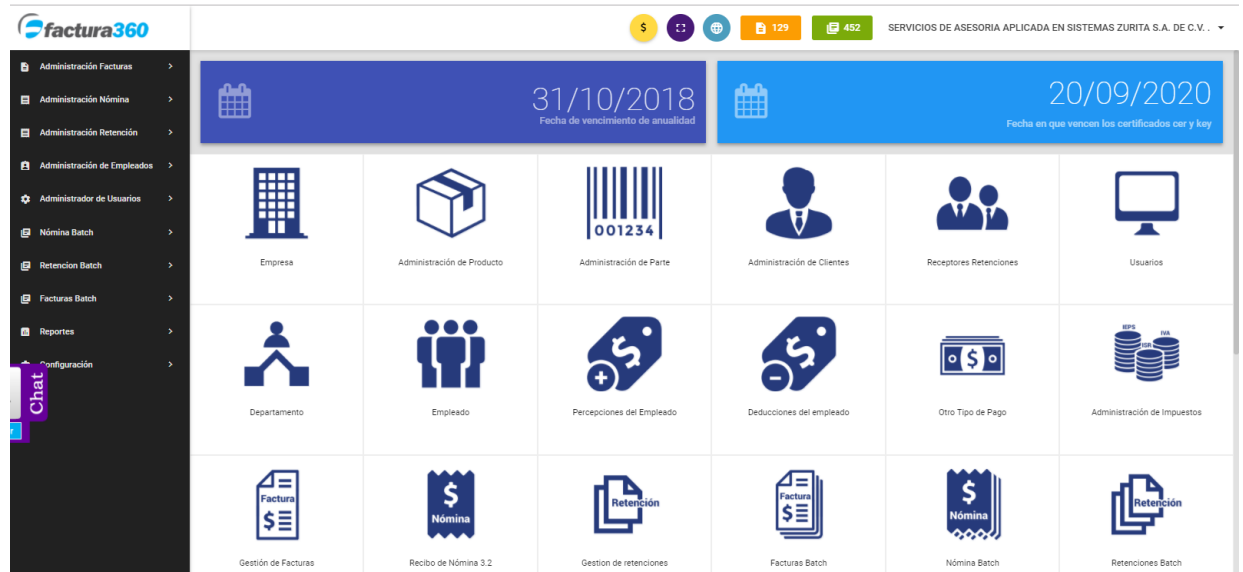
To access the system you need to enter username and password. It will be the account administrator and will have all the privileges of it:



The image shows a login form for Factura360. At the top is the Factura360 logo. Below it is the title 'Ingresar'. There are two input fields: 'Nombre de usuario *' with the value 'usuario_factura360' and 'Contraseña *' with masked characters. Below the password field is a checkbox labeled 'Recordar datos'. A blue button labeled 'INGRESAR' is positioned below the checkbox. At the bottom, there are two links: 'Olvido su contraseña.?' and 'Regístrate'.

2. NAVIGATION PANEL

Navigation Panel or main menu contains links to enter each of the system's functionality, you will find all menus on the left side:



Invoices Management: You can view, download all documents issued CFDI with version 4.0.

Payroll Administration: You can view drafts or receipts successful payroll.

Withholdings administration: withholdings issued the CFDI are displayed

Management Employees: You can Register or edit employee records, perceptions, departments, deductions and other payments.

User Management: You can create user records with restrictions on the system.

Payroll Batch: You can upload the txt or xml file system for batch loading payroll.

Retention Batch: You can upload the txt or xml file system for batch loading retentions.

Invoices Batch: You can upload the txt or xml file system for batch loading of invoices 4.0.

Reports: You can get Web reports and batch download batch system.

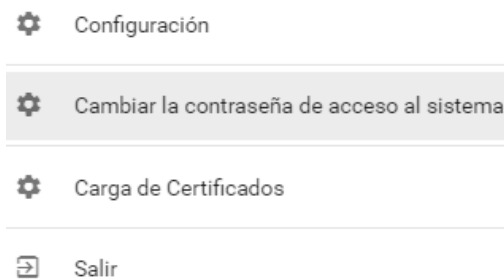
Configuration: You can create or edit my business, customers, products and taxes for issuing invoices.

At the top of the main panel you can see extra options:



1. Link to display web or batch paypal payment packages.
2. Option to change the system to full screen.
3. Option to change Spanish / English
4. Folios counter for invoices, payroll deductions or Web.
5. Batch counter folios / api.

Additionally, the system has options to edit account information, change password and loading certificates:



Configuration. Here the user can see the RFC registered name, email and CURP the issuer in case of natural person

Configuración de perfil

RFC

SAA090305UF4

Nombre completo o Razón social

SERVICIOS DE ASESORIA APLICADA EN SISTEMAS ZURITA S.A. DE C.V.

Correo Electrónico

soporte@factura360.com

[ENVIAR](#)

Change Password. In this menu you can change the password to access the system.

Cambia la contraseña

contraseña actual

nueva contraseña

Confirme nueva contraseña

GUARDAR

Loading certificates. In this panel you can upload your digital seals SAT and create a password creating invoices, which will serve as a token and thus not load the files each time it issues. If you lose the password must be loaded again.

Carga de Certificados

CARGAR CER Y KEY

CAMBIAR LA CONTRASEÑA CFDI

CER

CER

KEY

KEY

Nueva contraseña para creación de la factura

Contraseña

Fecha en que vencen los sellos digitales  enter date

Importante:

a) Esta contraseña se usa cada vez que emita o cancele un documento fiscal. Por favor resguárdela y memorízela. En caso de olvidarla tendrá que volver a cargar sus certificados.

A continuación le ofrecemos un mecanismo para recordar su contraseña de creación de facturas, que le servirá en caso de que no la recuerde o cuando el sistema detecte que su contraseña no es la correcta.

Elija una de las siguientes preguntas y escriba la respuesta. Le sugerimos que la respuesta le ayude a recordar la contraseña que acaba de ingresar

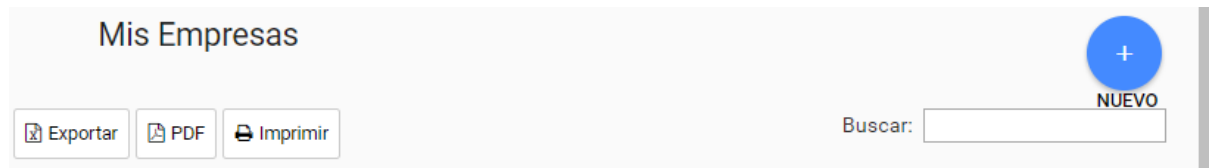
3. MY COMPANY MENU

In this module options to add companies or business activities as well as view or modify already stored information you will be found. All records must be the activities under the same RFC.



CREATE COMPANY

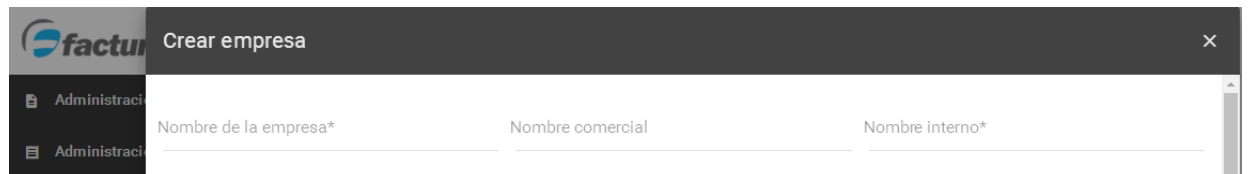
By clicking on "Settings" options will open and you can select Administration my business. Then press the + button on the right upper side.



It is important to note that these "businesses" are business activities that handle WITH SAME RFC registered.

The form asks fiscal data of the company as:

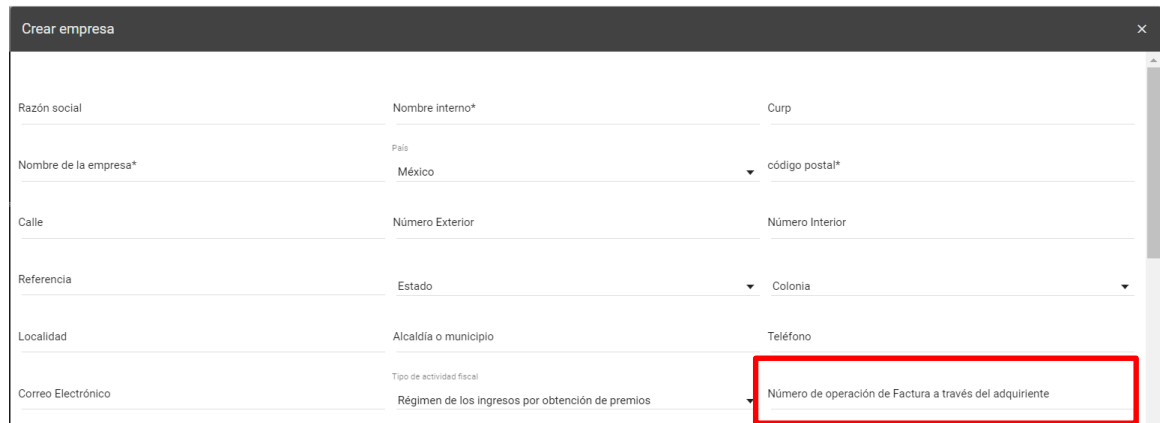
- **COMPANY NAME.** This name will not be reflected in your bill however will help in Factura360 differentiate between one activity and another.
- **PLEASE VERIFY IN THE FIELD INTERNAL CORPORATE NAME is saved and the data that goes forth as require ISSUER** as this information will be reflected in the CFDI.



- **TAX RESIDENCE.** Data can be captured tax domicile, the only requirement is ZIP as data transmitter. By entering the zip code will give automatic data as a colony, town, state, etc.

- **TYPE OF FISCAL ACTIVITY.** Campo required where the system at the issuer of the CFDI is chosen.

The company record contains the update of the tax regime as well as the optional field: "Number of invoice operation through the acquirer". Applies to purchases or acquisition of goods or merchandise by the purchaser:



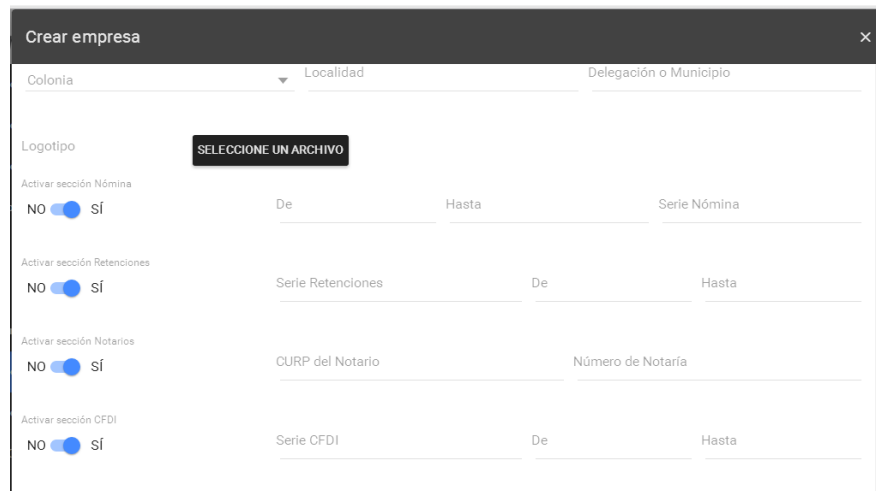
The screenshot shows a form titled "Crear empresa" with the following fields:

- Razón social
- Nombre interno*
- Curp
- Nombre de la empresa*
- País (dropdown menu)
- México
- código postal*
- Calle
- Número Exterior
- Número Interior
- Referencia
- Estado (dropdown menu)
- Colonia (dropdown menu)
- Localidad
- Alcaldía o municipio
- Teléfono
- Correo Electrónico
- Tipo de actividad fiscal
- Régimen de los ingresos por obtención de premios
- Número de operación de Factura a través del adquirente (highlighted with a red box)

COMPANY LOGO. It is recommended that the logo or .jpeg either .GIF type and dimensions are 350 x 350. If a rectangular image is recommended to be 350 x 450 or less.

If you need to issue paylips suggest activate the payroll section where you can add a number and range of folios. Remember, you must be a different series that use billing to avoid duplication.

- There are more sections that can be used for invoices, deductions or some add-ons SAT. For payroll should only be activated Section Payroll.



The screenshot shows the "Crear empresa" form with the following sections:
































- Colonia (dropdown menu)
- Localidad (dropdown menu)
- Delegación o Municipio (dropdown menu)
- Logotipo: SELECCIONE UN ARCHIVO
- Activar sección Nómina: NO SÍ
- De: _____ Hasta: _____ Serie Nómina: _____
- Activar sección Retenciones: NO SÍ
- Serie Retenciones: _____ De: _____ Hasta: _____
- Activar sección Notarios: NO SÍ
- CURP del Notario: _____ Número de Notaría: _____
- Activar sección CFDI: NO SÍ
- Serie CFDI: _____ De: _____ Hasta: _____

The section is integrated to be able to assign a series and range of folios exclusively for credit notes as well as select the option to generate the PDF file in English.

Activar sección Comercio Exterior NO <input type="radio"/> SI <input checked="" type="radio"/>	Serie CFDI	De	Hasta	Generar PDF en inglés para este tipo de documento NO <input type="radio"/> SI <input type="radio"/>
Activar Donatarias NO <input type="radio"/> SI <input checked="" type="radio"/>	Serie CFDI	De	Hasta	Generar PDF en inglés para este tipo de documento NO <input type="radio"/> SI <input type="radio"/>
Activar sección Carta Porte 1.0 NO <input type="radio"/> SI <input type="radio"/>				
Activar sección Carta Porte 2.0 NO <input type="radio"/> SI <input checked="" type="radio"/>	Serie CFDI	De	Hasta	Generar PDF en inglés para este tipo de documento NO <input type="radio"/> SI <input type="radio"/>
Activar sección notas de crédito NO <input type="radio"/> SI <input checked="" type="radio"/>	Serie CFDI	De	Hasta	Generar PDF en inglés para este tipo de documento NO <input type="radio"/> SI <input type="radio"/>
	N			

You can choose a default template for designing the PDF for clients or recipients. Available for Invoice CFDI 4.0.

Seleccione formato de Facturas

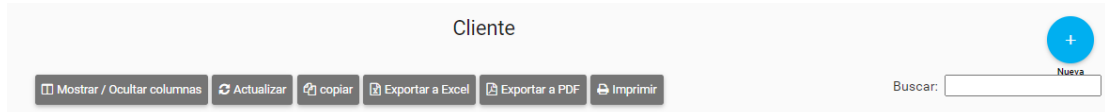
<input type="radio"/>	 Ver Diseño	<input type="radio"/>	 Ver Diseño	<input type="radio"/>	 Ver Diseño	<input type="radio"/>	 Ver Diseño	<input type="radio"/>	 Ver Diseño	<input type="radio"/>	 Ver Diseño
<input type="radio"/>	 Ver Diseño	<input type="radio"/>	 Ver Diseño	<input type="radio"/>	 Ver Diseño	<input type="radio"/>	 Ver Diseño	<input type="radio"/>	 Ver Diseño	<input type="radio"/>	 Ver Diseño
<input type="radio"/>	 Ver Diseño	<input type="radio"/>	 Ver Diseño	<input type="radio"/>	 Ver Diseño	<input type="radio"/>	 Ver Diseño	<input type="radio"/>	 Ver Diseño	<input type="radio"/>	 Ver Diseño
<input type="radio"/>	 Ver Diseño	<input type="radio"/>	 Ver Diseño	<input type="radio"/>	 Ver Diseño	<input type="radio"/>	 Ver Diseño	<input type="radio"/>	 Ver Diseño	<input checked="" type="radio"/>	 Ver Diseño
<input type="radio"/>	 Ver Diseño	<input type="radio"/>	 Ver Diseño	<input type="radio"/>	 Ver Diseño	<input type="radio"/>	 Ver Diseño	<input type="radio"/>	 Ver Diseño	<input type="radio"/>	 Ver Diseño
<input type="radio"/>	 Ver Diseño	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
			<input type="radio"/> Default								

- To complete the company registration click on the "Save" button, please make sure to enter all required information, which is marked with * otherwise the system will send an error message.

Información introducida correctamente

4. MENÚ CUSTOMERS

In this module you can create customer data or receivers of the company. To access this menu you must click on the Settings option and then in the Client Management option to register your details on the button with the + sign.



HIGH CUSTOMER

The form asks for all customer data such as:

CUSTOMER RFC. This field is entered RFC 12 or 13 digit homoclave receptor. Remember to write it in capital letters, without spaces or dashes. This field is required

CUSTOMER NAME. the receiver's name to Give you the CFDI be specified.

TRIB FISCAL ID NO. In this field annotate the Fiscal ID number in the case of foreigners, it is an optional field.

USE OF CFDI. Please select the key according to the instructions of your accountant. You can get the complete

COMPANY. If you drive more than one activity select which "business" you want to register to this employee.

FISCAL RESIDENCE. The system has by default Mexico. In the case of foreigners please indicate the country of the recipient. It is an optional field.

The data required for version 4.0 is added:

- Required field Tax regime of the recipient.
- Required field Postal code / fiscal address.
- Address data is added for the PDF format.

• **Phone and email.** Optional fields where you can enter the phone number of the employee and if they require automatic sending of the invoice enter email.

There are some extra fields as web page, automatically sending the customer to mail CFDI and Active option which is always asked to fill

You can choose a template by default for PDF design for clients or recipients. Available for Invoice CFDI 3.3.

To end customer registration click on the "Save" button, please make sure to enter all required information, which is marked with * otherwise the system will send an error message.

Información introducida correctamente

5. MENU PRODUCTS

In this module you will find options to add, view or modify products or services that use new bill. Click to access the Product Management menu. You can choose the right option + to add a new record

Productos

Mostrar registros

Buscar:

ID	Nombre del producto	Número de identificación	Clave de producto o servicio	Clave unidad de medida	Unidad de medida	Descripción	Precio unitario	Tipo impositivo (IVA)	Tipo impositivo (IEPS)	Tipo impositivo (Retención IVA)	Tipo impositivo (Retención IEPS)	Tipo impositivo (Retención ISR)	Activo
50980	CONTA3				SERVICIO	PLAN EMPRESA CON 4000 DOCUMENTOS	2585.34						NO

CREATE PRODUCTS

The form asks for all data such as:

NAME OF PRODUCT. In this field you can enter the name of product you like, it is for internal control.

KEY product or service. You must choose the type of key SAT recording. You can type the keyword or name, the system will display matches or options. You can view catalogs http://sat.gob.mx/informacion_fiscal/factura_electronica/Documents/catCFDI.xls

IDENTIFICATION NUMBER. You can enter your internal code assigned to the product. You should not have it you can put a row or a differentiator. For example 001, etc.

KEY UNIT OF MEASURE. In this field you must choose the type of key SAT recording. You can type the keyword or name, the system will display matches or options. You can view catalogs http://sat.gob.mx/informacion_fiscal/factura_electronica/Documents/catCFDI.xls

UNIT OF MEASUREMENT. In this section you can enter the internal unit of measurement.

UNIT PRICE. In this section you can enter the value of the concept before taxes.

Añadir Productos
×

Nombre del producto*

Clave de producto o servicio*

Número de identificación*

Clave unidad de medida

Unidad de medida

Precio unitario*

DESCRIPTION. In this section you can enter the concept or product description, it is the data that will be released in the CFDI.

Please Choose Active to use the product or concept.

Finally, options are integrated to indicate a default tax percentage or indicate that the product has a free percentage. You can then add both types of product on a single invoice.

The required field Tax Object is added. Which contains the following values:

- 01 – not subject to tax
- 02 – Tax object
- 03 – Taxable but not required to be itemized.

- Note: In case of using tax object 01 or 03, you should not select taxes in the new invoice.

Finally click the "Submit" button to complete the product registration, please be sure to enter all required information, otherwise the system will send an error message.

Información introducida correctamente

6. MENU TAXES

In this module you will find options to add, view or modify custom taxes that you can add in new bill.

Click to access the Tax Administration menu. You can choose the right option + to add a new record.

Configuración > Administración de Impuestos \$ 🌐 📄 129 📄 452 SERVICIOS DE ASESORIA APLICADA EN SISTEMAS ZURITA S.A. DE C.V. ▾

Administrar Impuestos +

Mostrar registros Buscar:

ID	Nombre de Impuesto	Impuesto	Porcentaje	Tipo de factor	Tipo impositivo	Modificar	Eliminar
4	iva trasladado	002 - IVA	0.26	Cuota	Retenido	✎ EDITAR	🗑 BORRAR

Mostrando registros del 1 al 1 de un total de 1 registros Anterior Siguiente

Levy taxes

The form asks for all data such as:

NAME OF TAX. In this field you can enter the name of the tax, it is for internal control.

Tax rate. You can select from tax transferred or retained.

TAX.ISR 002 - - VAT, 003 - 001 IEPS taxes will be displayed. You can select any of them.

TYPE FACTOR. In this field you can select between rate or fee.

PERCENTAGE. In this section you can enter the personal tax rate.

Añadir registro de Impuesto ✕

Nombre de Impuesto Tipo impositivo

Traslados Retenido

Tipo de factor Porcentaje

001 - ISR

002 - IVA

003 - IEPS

CANCELAR

Finally click the "Submit" button to complete the registration tax, please be sure to enter all required information, otherwise the system will send an error message.

Información introducida correctamente

7. MENU ADDENDA

In this module you will find options to add, view or modify Addendas or extra fields that apply to CFDI 3.3.

To access click the Addenda Administration menu. You can choose the right option + to add a new record.



Configuración > Administración de Addenda

ADDENDA

Mostrar registros: Mostrar / Ocultar columnas Actualizar Copiar Exportar a Excel Exportar a PDF Imprimir Buscar: Nuevo

ID	Título	Contenido	Modificar	Eliminar
1	Campo 1	prueba de contenido	EDITAR	BORRAR

Mostrando registros del 1 al 1 de un total de 1 registros

Anterior Siguiente

CREATE ADDENDUM

The form asks for all data such as:

- **NAME ADDENDA.** In this field you can enter the name of addenda, is the field name on your bill.
- **CONTENT.** This field will capture the value that will have the field, you can edit new bill.

Finally click the "Submit" button to complete the registration of addenda, please be sure to enter all required information, otherwise the system will send an error message.

Información introducida correctamente

8. INVOICES ADMINISTRATION AND INVOICES MANAGEMENT MENU

In this module you can issue your CFDI for income, expenses, transfers and Payments. You must click on the Invoice Administration and Invoice Management menu and press the button with the + sign.

NEW INVOICE

The form requests the following fields:

DOCUMENT TYPE. You can select Invoice, fee receipt, credit note, etc. It will automatically show the type of receipt as Income, Expense, Transfer or Payment.

TYPE OF CURRENCY. You can enter from national currency MXN to other types of currency according to the SAT catalog.

EXCHANGE RATE. If a currency other than Mexican pesos is chosen, you can enter the exchange rate of the day. If it is MXN it must have value 1

ISSUER DATA. The issuer name can be selected from the drop-down list. You must be previously registered in configuration and administration my companies.

PASSWORD FOR INVOICE CREATION. You must enter the password created in the certificate load menu.

RECEIVER DATA. You can type part of the name of the client or RFC to whom the CFDI will be issued. You must first be registered in the clients menu. The name will be displayed automatically and you can select it:

Datos Del Cliente

Nombre Del Cliente* RFC* Uso CFDI

EXPORT. The required Export field is added where you can choose 01 – Not applicable, 02 – Definitive, 03 – Temporary.

Exportación

GLOBAL INFORMATION. Optional fields are added where periodicity, month and year can be indicated. Applies to global or public sales invoices:

Información Global

Periodicidad* Mes* Año*

CONCEPTS. In concepts, the Object of tax from products field is added. It is a required field.

Conceptos

Nombre de producto	Clave de producto o servicio	Número de identificación	Cantidad
TEST	01010101 - No existe en el catálogo	N100	1
Clave unidad de medida	Unidad de medida	Precio unitario*	Descuento*
E48 - Unidad de servicio	NA	10	0
<input type="checkbox"/> Usar área de texto libre	Descripción	Objeto de impuesto	
	anualidades	<input type="text" value="02 - Si objeto de impuesto"/>	

Within concepts, the section on account of third parties is added where the RFC on account of third parties, Name on account of third parties, Fiscal Regime and Fiscal Address (Zip Code) of the third party is indicated.

A cuenta de terceros

RFC a cuenta de terceros Nombre a cuenta de terceros Régimen Fiscal a cuenta de terceros Domicilio fiscal a cuenta de terceros

Within concepts you can add all the request numbers you like with the current structure of the SAT:

Información adicional

Numero de pedimento

AGREGAR

Once the concept has been added, the property account section will be observed where one or more records are added as well as part records:

Nombre de producto	Clave de producto o servicio	Número de identificación	Clave unidad de medida	Unidad de medida	Cantidad	Precio unitario	Descuento	Importe	Operación
TEST	01010101 - No existe en el catálogo	N100	E48 - Unidad de servicio	NA	1	\$10.00	\$0.00	\$10.000	<input checked="" type="checkbox"/> Editar <input checked="" type="checkbox"/> Eliminar <input checked="" type="checkbox"/> Agregar registro parte <input checked="" type="checkbox"/> Agregar Cuenta predial

Parte

Nombre del producto	Clave de producto o servicio	Número de identificación*	Clave unidad de medida
TEST	10211712 - Astromelia viva jamaica	1	E48
Cantidad*	Precio unitario*	Descripción	
1	1	TEST	

AGREGAR

Cuenta predial

123645 **AGREGAR**

TAXES. You can choose the fields of type of tax, type of factor, Rate or quota and the system will calculate the correct tax.

a) If the product has been saved with a default tax, the system will take it and omit the percentage in the new invoice.

b) Likewise, if custom taxes were created, they will be shown in a new invoice and will be calculated as long as the product does not have a default tax.

Impuestos Traslados

Impuesto	Tipo de factor	Tasa cuota \$
002 - IVA	Tasa	0.160000 - IVA
Importe \$	<input type="text" value="0"/>	

AGREGAR IMPUESTOS

Impuesto	Tipo de factor	Tasa cuota	Importe
003 - IEPS	Tasa	\$0.03	\$2.70

Impuesto Retenido

Impuesto	Tipo de factor	Tasa cuota \$
001 - ISR	Tasa	0.100000 - ISR
Importe \$	<input type="text" value="9"/>	

AGREGAR IMPUESTOS

When adding taxes, if there is a difference, you can edit the concept you like and the option to modify the amount or base of the tax will be displayed:

Información adicional

Impuestos Traslados	Base \$	Impone \$	
	1	0.16	MODIFICAR IMPUESTO

Impuesto	Tipo de factor	Tasa cuota	Importe	
002 - IVA	Tasa	\$0.16	\$0.16	✎ Editar

Impuesto Retenido

[GUARDAR CAMBIOS](#)

[Gracias por contactar a Factura360, ¿Cómo podemos apoyarte?](#)

TOTALS. Once you add all the concepts, the system will show subtotal, sum of transfers, sum of withholdings, sum of discounts to finally calculate the total.

Subtotal	100
Total impuestos Traslados	2.69
Total impuestos Retenidos	0
Descuento	10
Total	92.7

The additional information sections such as payment method and payment method will include the catalogs updated by the SAT:

Información adicional

Forma de pago

Seleccione uno

Condiciones de pago

Lugar de Expedición*

Método de Pago

72570

Clave de confirmacion

RELATED CFDI'S. In version 4.0 you will be able to add multiple relationships with one or more related UUIDs. First, the relationship is now selected and later you can select or type the entire fiscal folio, finally press the button to add related CFDI:

Cfdi Relacionados

Tipo de relación

AGREGAR CFDI

Tipo de relación

04 - Sustitución de los CFDI previos 🗑️

UUID relacionado

97887848-48787-78787-787878 🔍 AGREGAR CFDI RELACIONADO

UUID relacionado

12457487-7878-7878-7878-818484184 🗑️

FOREIGN TRADE SUPPLEMENT.

Complementos

Complementos Concepto

Seleccione Uno

Complemento comercio exterior

Tipo de operación*

2 - Exportación

Clave de pedimento

A1 - IMPORTACION O EXPORTACION DEFINITIVA

Certificado Origen

0 - No Funge como certificado de origen

Número de certificado

00000

Número de exportador confiable

987654

Clave de INCOTERM

DAT - ENTREGADA EN TERMINAL.

Subdivisión

0 - No tiene subdivisión

Tipo de cambio USD

18.5

Total USD

10000

Motivo de traslado

99 - Otros

Observaciones

Test

Type of operation. Export - value 2 is chosen.

Pedimento key. Import the A1- or permanent export value is chosen.

Origin certificate. You can be chosen between 0 - No serves as certificate of origin, 1 -Funge as certificate of origin.

Certificate number.If you choose Option 1 certified origin should enter the certificate number. If the value is 0 in the previous field should not be filled certificate number.

Number reliable exporter. Optional field to enter the number of reliable exporter.

Incoterm key. You must choose a catalog value indicated by the SAT.

Subdivision. Indicated one of the values: 0 - No subdivision 1 - Have subdivision

USD exchange rate. It should indicate the exchange rate of the day for the US dollar.

Total USD. It must indicate the total of goods in dollars according to the rate indicated.

Reason for transfer. You must choose a catalog value of SAT 01,02,03,04,05,99.

Observations. This field must be filled only if the value of reason for transfer is 99.

DATA OF THE ISSUER

Datos del emisor

Curp	País*	código postal* 72000
	México	72000
Calle	Número Exterior	Número Interior
test Calle	100	A
Referencia	Estado	Colonia*
Na	Puebla	Centro

CURP. If the issuer is an individual, you must enter CURP without spaces, dashes and capital letters.

Country. the value of the country where it originated the issuer indicated.

Postal Code. the value of the zip code of the sender address indicated.

Street. the street address of the sender is captured.

Exterior. Outside number Emitter CFDI address indicated.

Inside. Inside number Emitter CFDI address indicated.

Reference. It is indicated in which streets the domicile of the issuer of the CFDI is.

State. Catalog value of the state issuer, if country is Mexico a different value is selected may be manually entered

Colony. colony where the address of the sender is shown.

OWNER

Propietario

NumRegIdTrib*

1213548

Pais*

México

Owner

Registration tax ID number (TAX ID). Optional field where the tax id full owner of the merchandise, usually left empty because the owner normally is Mexican.

Country.the host country indicated. It must be completed only when the value is different from Mexico.

DATA RECEIVER

Datos del Receptor

NumRegIdTrib

987451

Pais*

Estados Unidos (los)

Calle

Test Calle

Número Exterior

1

Número Interior

A

Referencia

Na

código postal*

874510

Colonia*

Test

Localidad*

Test

Municipio*

Test

Estado*

TX

Registration tax ID number (TAX ID).the tax identification number of the recipient of the goods is indicated.

Country. the value of the country where it originated receiver indicated.

Postal Code. the value of the postal code of the recipient's address indicated.

Street. Street address is captured receptor.

Exterior. Outside number CFDI receiver address indicated.

Inside. Inside number CFDI receiver address indicated.

Reference. It is indicated in which streets the address of the receiver is CFDI.

Colony. Colony receiver address is captured

Location. the location of the recipient address is captured.

Municipality. the municipality or county of the recipient address is captured.

State. a value Catalog receiver status, if that country is a different value is selected to Mexico can be entered manually

ADRESSEE DETAILS

Destinatario		
Número de identificación ó registro Fiscal	Nombre o Razón social del destinatario	
987451	Company TEST	
Domicilio del Destinatario		
País*	Calle	Número Exterior
Estados Unidos (los)	Test	1
Número Interior	Referencia	código postal*
A	Na	987451
Colonia*	Localidad*	Municipio*
Test	Test	Test
Estado*		
Test		

Registration tax ID number (TAX ID). the tax identification number of the consignee of the goods is indicated.

Name and address of the recipient. the company name and address of the recipient indicated.

Country. the value of the country where it originated the recipient indicated.

Postal Code. the value of the zip code of the recipient's address indicated.

Street. Street address of the consignee is captured.

Exterior. the outside number CFDI recipient's address indicated.

Inside. inside number CFDI recipient's address indicated.

Reference. What street is indicated in the recipient's address is the CFDI.

Colony. Colony recipient's address is captured

Location. location of the recipient's address is captured.

Municipality. the municipality or county of the recipient's address is captured.

State. a value Catalog recipient state is selected. if that country is a different value may be entered manually Mexico

GOODS

Mercancía

Clave de identificación de la mercancía exportada

MER-1548

Fracción Arancelaria 01029099 - Los demás.

01029099

Cantidad de bienes en la aduana

1

Unidad de medida aplicable a la mercancía

01 - KILO

Valor unitario en la aduana (USD)

10

Valor Total (USD)

10

AGREGAR MERCANCÍA

Key identifying the exported goods. You must enter the internal number or identification code of the goods. This data must match the identification number registered with concepts for each commodity and added concept.

Tariff fraction. You must enter the password to 8 digits or a word of the correct tariff. You can enter and wait a moment for the system to display the result and to add it. Catalog tariff on:

http://www.sat.gob.mx/informacion_fiscal/factura_electronica/Paginas/Catalogos_comercio_exterior.aspx

Quantity of goods at customs. It should indicate the quantity of goods or products at customs for export.

Unit of measure applicable to the goods. It should indicate the unit of measure related to tariff selected above.

Unit value at customs. the unit value of the goods in dollars within Customs indicated.

Total value USD. Must indicate the total merchandise DLS (quantity * unit customs value).

Specific descriptions

Clave de identificación de la mercancía exportada	Fracción Arancelaria	Cantidad de bienes en la aduana	Unidad de medida aplicable a la mercancía	Valor unitario en la aduana (USD)	Valor Total (USD)	Descripciones específicas								
MER-1548	01029099 - Los demás.	1	01	\$10.00	\$10.00	<input checked="" type="checkbox"/>								
<table border="1"> <thead> <tr> <th>Marca de la mercancía</th> <th>Modelo de la mercancía</th> <th>Submodelo de la mercancía</th> <th>Número de serie de la mercancía</th> </tr> </thead> <tbody> <tr> <td>TEST</td> <td>MOD8794</td> <td>NA</td> <td>1515454848</td> </tr> </tbody> </table>							Marca de la mercancía	Modelo de la mercancía	Submodelo de la mercancía	Número de serie de la mercancía	TEST	MOD8794	NA	1515454848
Marca de la mercancía	Modelo de la mercancía	Submodelo de la mercancía	Número de serie de la mercancía											
TEST	MOD8794	NA	1515454848											
Marca de la mercancía Modelo de la mercancía Submodelo de la mercancía Número de serie de la mercancía...						<input type="button" value="AGREGAR DESCRIPCIÓN"/>								

Brand merchandise. It is an optional field where the brand can be entered, the system accepts alphanumeric characters.

Model merchandise. Optional field where the model or year that was produced merchandise indicated.

Submodel. Optional field where the submodel or sub-brand merchandise indicated registered

Serial number of the goods. Optional field where the number of goods indicated.

ADDENDUM. If there are Addendas created, they can be selected, change the value and add. All required Addenda fields can be added.

Seleccione Addenda

Tipo de Documento Referencia

Referencia 20

OBSERVATIONS. If any extra data is required, it can be included in this field.

Observaciones

TEST OBSERVACIONES

PROMISE TEXT. An extra promissory note text can be added at the end of your invoice. By activating this option you can edit the default text.

Pagaré

Incluir texto pagaré en su factura

Debo (amos) y pagare (mos) incondicionalmente, a la vista y a la orden de SERVICIOS DE ASESORIA APLICADA EN SISTEMAS ZURITA SA DE CV la cantidad anotada en esta factura el día 2017-09-26, si no fuere pagado satisfactoriamente este pagaré me (nos) obligo (amos) a pagar durante todo el tiempo que permaneciera total o parcialmente insoluto, intereses moratorios a razón del 0.030000% mensual sin que por esto considere prorrogado el plazo fijado para cumplir esta obligación.

You can choose the option to Issue CFDI or draft. There is also the Preview option where the user can see how the receipt will be issued in PDF format

Seleccione Uno

Emitir CFDI

CANCELAR ENVIAR VISTA PREVIA

Depending on the chosen format, you will be able to see the preview with / without logo, individual or general itemized taxes:


Comprobante Fiscal Digital por Internet
Nota de Crédito

RFC Emisor: SAA090305UF4 **Versión:** 4.0
Nombre Emisor: SERVICIOS DE ASESORIA APLICADA EN SISTEMAS ZURITA **Serie/Folio:** TEST40/63
Régimen fiscal: 601 - General de Ley Personas Morales **Fecha de emisión:** 2022-04-18 18:23:40
RFC Receptor: ZFL080519LGO **Tipo de comprobante:** Egreso
Nombre Receptor: ZURITA FLORERIAS **Lugar de Expedición:** 72570
Dirección: TEST
Domicilio Fiscal: 72570
Residencia Fiscal: MEX - México
Uso CFDI: 001 - Adquisición de mercancías
Régimen Fiscal: 601 - General de Ley Personas Morales

CSi Relacionados
Tipo de relación:
 01 - Nota de crédito de los documentos relacionados
UUID relacionado:
 87f90557-7e57-4f8e-a669-ebb0460c35a9

Clave del producto y/o servicio.	No identificación	Cantidad	Clave Unidad	Unidad	valor unitario	Importe	Descuento	Descripción	Objeto de impuesto
86141501 - Servicios de asesorías educativas		1.000	E48		\$ 100.00 MXN	\$ 100.00 MXN	\$ 0.00 MXN	anualidades	02 - Si objeto de impuesto

Exportación: 01 - No aplica **Subtotal:** \$ 100.00 MXN
Tipo de Cambio: 1 **IMP IVA Traslado (16.00%):** \$ 16.00 MXN
Moneda: Pesos Mexicanos **Total:** \$ 116.00 MXN
Forma de Pago: Transferencia electrónica de fondos **Cantidad con letra:** Ciento Dieciséis Pesos Mexicanos 00/100 MXN
Método de pago: Pago en una sola exhibición



Sello Digital del Emisor
 Sello Digital del SAT
 Cadena Original del Emisor
 Cadena original del Sello digital del SAT

Fecha de Certificación
 2022-04-18 18:23:40
 Folio Fiscal
 No. Certificado SAT

Este documento es una representación impresa de un CFDI

To finish the CFDI registration, click on the "Send" button, please make sure you enter all the required information, which is marked with *, otherwise the system will send an error message.

Información introducida correctamente

DRAFTS.

The system also allows you to save drafts of the captured information, in this way in cases of not finishing the CFDI capture, it can be saved and resumed at the required time.

9. INVOICE MANAGEMENT

In the Invoice Administration module, there will be the options, PDF (Official CFDI Document), XML and the option Cancel Invoice, Send by mail, CFDI status.

ID	Serie/Folio	RFC del receptor	Nombre del receptor	Total	Fecha de Creación	Estado	Tipo de Documento	Pagada	Descargar XML	Descargar PDF	Enviar correo electrónico	Clon	Complemento de Pagos	Eliminar
3058	TEST40/75	XAXX010101000	'PUBLICO EN GENERAL'	1.00	20 abril, 2022	Exitoso	Factura	NO PAGADA	DESCARGAR XML	DESCARGAR PDF	ENVIAR CORREO	CLON	COMPLEMENTO PAGOS	CANCELAR
3055	TEST40/66	XAXX010101000	'PUBLICO EN GENERAL'	1.00	19 abril, 2022	Pendiente	Factura	NO PAGADA	DESCARGAR XML	DESCARGAR PDF	ENVIAR CORREO	CLON	COMPLEMENTO PAGOS	CANCELAR
3054	TEST40/66	XAXX010101000	'PUBLICO EN GENERAL'	116.00	19 abril, 2022	Pendiente	Nota de Credito	NO PAGADA	DESCARGAR XML	DESCARGAR PDF	ENVIAR CORREO	CLON	COMPLEMENTO PAGOS	CANCELAR
3049	TEST40/50	XAXX010101000	'PUBLICO EN GENERAL'	116.00	13 abril, 2022	Exitoso	Nota de Credito	NO PAGADA	DESCARGAR XML	DESCARGAR PDF	ENVIAR CORREO	CLON	COMPLEMENTO PAGOS	CANCELAR

10. CANCELLATION OF CFDI ONE BY ONE, MASSIVELY.

Each record has the legend Cancel, you can press this option and enter the invoice creation password as well as a reason for cancellation. In case of requiring massive cancellation, you can check the records with the box on the left side and then press the Cancel button at the top.

Borrar Factura 4.0

Contraseña de creación de factura: *****

Motivo de cancelación: 02 - Comprobante emitido con errores sin relación

CANCELAR ENVIAR

11. BATCH FILE DOWNLOAD AND INVOICE REPORT

In the report panel you can find the section where invoices are downloaded by date. You only have to choose the type of document and the date range to download. The system will search for all results that match between the start date and the end date. After a few seconds the browser will show a download in .zip

You can also obtain a detailed report of the active and canceled CFDIs, once the required filters are used you can export them to Excel:

ID	Certificador	Version	Serie/Folio	Fecha de creación	UUID	Tipo de comprobante	Tipo de Moneda	RFC emisor
240	Edicom	3.3	FACT/3042	15 septiembre, 2017	E693A804-63A1-4502-8B58-AC0AF49637F4		MXN	SAA090305UF4
239	Edicom	3.3	FACT/3040	15 septiembre, 2017	9AD4A60C-E18E-4FB1-8868-C22DD99331C9		MXN	SAA090305UF4
238	Edicom	3.3	FACT/3039	15 septiembre, 2017	727FE836-C4CB-4292-AB5A-A638835B1C67		MXN	SAA090305UF4
236	Edicom	3.3	FACT/3041	15 septiembre, 2017	C53EE892-7BDA-4B5E-A38C-782E18DBC293		MXN	SAA090305UF4

9. LIST OF CHANGES CFDI 4.0

- a) The field "Name, denomination or business name of the recipient" is a mandatory field.
- b) The recipient's name must be recorded in capital letters.
- c) For the use of RFC XAXX010101000, the receiver name "PUBLIC IN GENERAL" must be used, as well as regime 616, use of CFDI S01 and the postal code of the issuer.
- d) For the use of RFC XEXX010101000, regime 616 must be used, use of CFDI S01 and the postal code of the issuer.
- e) The fields "Tax regime of the receiver" and "Tax domicile of the receiver" are incorporated, which are mandatory.
- f) The "Export" field is incorporated, where it must be indicated if the voucher corresponds to a definitive or temporary export operation.
- g) The fields "Frequency", "Months" and "Year" are incorporated, for purposes of issuing global invoices.
- h) The element ACuentaTerceros is added, which replaces the "Complement Concept PorCuentadeTerceros"
- i) The field "Object of the tax" is added within each concept.
- j) Within the XML the sums of the tax bases are added.
- k) Change the property account field to multiple accounts in the same concept.
- l) The related cfdi node is modified with the ability to add multiple types of relationship and with the number of related cfdi that are required.
- m) The billing operation number field is added through the acquirer.
- n) In payment complements, the total node is added, including: total base VAT Exempt, 0%, 8% or 16% as well as total VAT 0%, 8% or 16% and total amount of payments.
- o) In the payment complement, the breakdown of taxes is included when the type of object is 02.
- p) Update of cfdi use keys
- q) Updating of Fiscal Regime codes.