Click here to enter a date.

**Small Account Client Profile**

Small account is classified as single service only. If the service isn’t listed, implementation meeting is required.

**Basic Client Background:**

Company Name: Click here to enter text.

Is This An Existing Customer? [ ]  Yes [ ] No

Website: Click here to enter text.

Commodity: Click here to enter text.

Brief Overview of the Business: Click here to enter text.

Anticipated Start Date: Click here to enter text.

Main Address: Click here to enter text.

Billing Address (If Different): Click here to enter text.

Billing Currency: Click here to enter text.

Billing Contact Name: Click here to enter text.

Billing Contact Phone Number: Click here to enter text.

Billing Contact E-mail Address: Click here to enter text.

Frontier Team: Click here to enter text.

Frontier ISR: Click here to enter text.

Frontier Business Development Manager: Click here to enter text.

**Please Have The Following Documents:**

[ ]  Credit Application – must be approved by the time this document is sent out

[ ]  Signed Contract

[ ]  Expected Volumes for All Accounts

**Please Complete The Applicable Service:**

[ ]  Frontier Manitoba Freight & Courier [ ]  Freight Forwarding [ ]  Northbound Chicago Consolidation

[ ]  US Customs Brokerage [ ]  CAD Customs Brokerage [ ]  Frontier Consolidated Services[[1]](#footnote-1)

[ ]  Manitoba Freight & Courier – Less Than 10 Shipments Daily

**Please Have The Following Documents:**

[ ]  Rate sheet to customer

[ ]  Account information to set up in the system to get rates

[ ]  WEBship loaded in advance

**Check All That Applies:**

[ ]  Same Day Delivery Required [ ]  Tail Gate Delivery Required [ ]  Hazardous Material

[ ]  Food Products [ ]  Special Rates/discount levels [ ]  Fragile

**Please Complete The Following:**

Type of Company: [ ]  B2C [ ]  B2B

Identify Expected Weekly Volume: Click here to enter text.

Estimated Average Size Package: Click here to enter text.

LTL to Parcel Ratio: Click here to enter text.

Billing Frequency: [ ]  Daily [ ]  Weekly [ ]  Bi-Weekly

E-mail address of the shipper: Click here to enter text.

Main Pick-Up Location(s) (Full Address): Click here to enter text.

Required Receiving Times: Click here to enter text.

Required Pick Up Times: Click here to enter text.

Method of Dispatch: [ ]  WEBship [ ]  Call/Email

WEBship Login: Click here to enter text.

WEBship Password: Click here to enter text.

WEBship Activated Functions: [ ]  Order [ ]  Rates [ ]  Tracking [ ]  Proforma

The client has been trained on WEBship: [ ]  Yes [ ]  No

Require Services Outside of Our Delivery Service Points? [ ]  Yes [ ]  No

Is the client aware to let us know if a bigger truck is needed? [ ]  Yes [ ]  No

**Additional Notes**: Click here to enter text.

[ ]  Northbound Chicago Consolidation – Once A Week Consolidation

**Please Complete The Following:**

Type of Company: [ ]  B2C [ ]  B2B

E-mail address of the shipper: Click here to enter text.

Identify ship schedule: Click here to enter text.

Routing out of Itasca: [ ]  East [ ]  West

To which location(s) in Canada: Click here to enter text.

LTL to small parcel ratio: Click here to enter text.

Hazardous Material: [ ]  Yes [ ]  No

Small parcel prepaid into Itasca by client/supplier: [ ]  Prepaid [ ]  Collect [ ]  Both

LTL Terms into Itasca[[2]](#footnote-2): [ ]  Prepaid [ ]  Collect

Is WEBship Setup? [ ]  Yes [ ]  No

WEBship Login: Click here to enter text.

WEBship Password: Click here to enter text.

WEBship Functions: [ ]  Order [ ]  Rates [ ]  Tracking [ ]  Proforma

The client has been trained on WebSHIP: [ ]  Yes [ ]  No

A1 Automated Process Set Up: [ ]  Yes [ ]  No

Who is leg one Carrier: Click here to enter text.

Freight Class & NMFC # if applicable: Click here to enter text.

Separate Leg 1 PFS needed for billing: Click here to enter text.

Consolidated order rating in A1: Click here to enter text.

**Additional Notes:** Click here to enter text.

[ ]  US Customs Brokerage - Less Than 60 Imports A Year

**Please Have The Following Documents:**

[ ]  Credit Application (for regular business); C.O.D. for infrequent importers

[ ]  Customs Power of Attorney [ ]  New Account Information Form

[ ]  Federal Tax ID or Social Security Number or Customs Assigned Importer Number

[ ]  State issued proof of business, IRS EIN letter or Federal or State-issued photo ID

**Other Documents Needed To Clear Customs (To Be Provided As Early As Possible Before Shipment Arrival)**

[ ]  Commercial Invoice [ ]  Packing List [ ]  Arrival Notice

[ ]  Copy of Bill of Lading if Express Release; Original Bill of Lading otherwise

[ ]  Other documentation, permits or licenses as required by Partner Government Agencies

**Brokerage Details:**

Country of origin of goods: Click here to enter text.

Peak/Slow Seasons: Click here to enter text.

Average # of tariff Lines per invoice: Click here to enter text.

Database provided? [ ]  Yes [ ]  No

If no explain how products will be classified: Click here to enter text.

Who will provide NAFTAs? Click here to enter text.

Products subject to Partner Gov’t Agencies? Click here to enter text.

Examples: EPA, DOT, FDA, Fish and Wildlife, Lacey Act, etc.

Who to contact if questions about an invoice/product/tariff: Click here to enter text.

Contact Phone Number: Click here to enter text.

Contact E-mail Address: Click here to enter text.

Does importer have a continuous bond? Click here to enter text.

Who handles final delivery to consignee? Click here to enter text.

Cargo Insurance needed? [ ]  Yes [ ]  No

For ocean shipments: Who will file ISF? Click here to enter text.

**To The Best Of Importer’s Knowledge, Please Check All That Applies:**

☐ Currently On Sanction ☐ Filed Bankruptcy ☐ Pending Bond Claims

☐ Prior Fraud or Negligence ☐Paid Bond Claims

**USA Brokerage Fees:**

U.S. Customs Entry Filing: Click here to enter text.

Duties/Taxes (at cost): Click here to enter text.

Importer Security Filing: Click here to enter text.

U.S. Customs Single Transaction Bond: Click here to enter text.

ISF Bond: Click here to enter text.

Courier/Messenger: Click here to enter text.

Partner/Government Agency Filing: Click here to enter text.

Other Charges: Click here to enter text.

**Additional Notes:** Click here to enter text.

[ ]  CAD Customs Brokerage - Less Than 60 Imports A Year

**Please Have The Following Documents:**

[ ]  Foreign Exchange Letter for US billed clients

[ ]  GST Letter/Direct Security Letter

[ ]  Canadian Release of Goods Bond

[ ]  Power of Attorney/GAA

**Please Complete The Following:**

Average # of transactions per year: Click here to enter text.

Average # of CCI Lines per invoice: Click here to enter text.

Database provided? [ ]  Yes [ ]  No

If no explain how products will be classified: Click here to enter text.

Who will provide the NAFTAs? Click here to enter text.

OGDs: Click here to enter text.

Who to contact if questions about an invoice/product/tariff: Click here to enter text.

Contact phone number: Click here to enter text.

Contact E-mail: Click here to enter text.

**CAD Brokerage Fees:**

Flat Fee Click here to enter text. OR Schedule: HVS Click here to enter text. LVS Click here to enter text.

CCI Line Fee: Click here to enter text. Number of Free Lines: Click here to enter text.

**Additional Notes:** Click here to enter text.

[ ]  International Freight Forwarding - Less Than 4 Imports A Year

**Please Complete The Following:**

[ ]  Import [ ]  Export

[ ]  Ocean [ ]  Air

Incoterms: Click here to enter text.

Name: Click here to enter text.

Address: Click here to enter text.

Shipping Contact: Click here to enter text.

Shipping Contact Phone Number: Click here to enter text.

Shipping Contact E-mail: Click here to enter text.

Customs broker: Click here to enter text.

Any special instructions: Click here to enter text.

 PLEASE ATTACH APPLICABLE DOCUMENT/QUOTE

**Additional Notes:** Click here to enter text.

1. Upon Request & Review [↑](#footnote-ref-1)
2. If Frontier is doing LTL collect from supplier and bringing to Itasca, include rates/list of locations in excel sheet [↑](#footnote-ref-2)