Click here to enter a date.

**CHECKLIST TO BE COMPLETED BEFORE IMPLEMENTATION MEETING**

***Credit MUST already be approved (in advance)***

*ISR assignment complete, please request team from Lisa/Renee/Angel/Petra*

*Communicate applicable rate information*

*Complete POA if applicable*

*Complete client profile*

**Instruction of Setting Up Account**

**Account Client Profile**

**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.

Method of Payment:  Cheque  Credit Card  Wire/EFT

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 Complete The Applicable Service:**

Freight & Courier  IFF (International Freight Forwarding)  Warehousing

US Customs Brokerage  Cross Border Logistics

CAD Customs Brokerage

**Freight & Courier:**

**Please Complete the Following Prior to Implementation Meeting:**

Rate Sheet to a Team (email group)

Customer Information for Set up to the RateRequests (email group)

**Please Complete the Following Prior to Implementation Meeting:**

Customer Information for Set up to [ar@frontierscs.com](mailto:ar@frontierscs.com) & a Team

**Check All That Applies:**

Same Day Delivery Required  Tail Gate Delivery Required  Hazardous Material

Food Products  Special Rates/discount levels  Fragile

Potential for Domestic Shipping  Potential for Southbound Shipping

**Please Complete The Following:**

Type of Company:  B2C  B2B

Parcel Break: 150 lbs  API

System:  Webship  Frontship

Identify the main pick-up locations: Click here to enter text.

Required receiving and 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

Identify expected weekly volume: Click here to enter text.

Average size package: Click here to enter text.

LTL to Parcel Ratio: Click here to enter text.

Billing Frequency:  Daily  Weekly  Bi-Weekly

Billing Format:  Excel  PDF

Special Requirements: Click here to enter text.

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

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

Special Requirements: Click here to enter text.

End of Day Time: Click here to enter text.

Identify pick-up window: Click here to enter text.

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

**Check All That Applies:**

Delivery Appointments  Power Tail Gate  Hazardous Material

Food Products  Location Needing Appointments  Fragile

Residential Deliveries  Inside Deliveries

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

**Cross Border Logistics**

**Please Complete the Following Prior to Implementation Meeting:**

Rate Sheet to the RatesRequest

Customer Information for Set up to [ar@frontierscs.com](mailto:ar@frontierscs.com)

**Please Complete The Following:**

Type of Company:  B2C  B2B

Program:  Trial period  Full program

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.

Identify Daily Volume: Click here to enter text.

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

Special Requirements: Click here to enter text.

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

Billing Frequency:  Daily  Weekly  Bi-Weekly

Billing Format:  Excel  PDF

Special Requirements: Click here to enter text.

End of Day Time: Click here to enter text.

Identify pick-up window: Click here to enter text.

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

**Check All That Applies:**

Delivery Appointments  Power Tail Gate  Hazardous Material

Food Products  Fragile  Residential Deliveries

Inside Deliveries  Construction Site/Storage Facility deliveries

Confirm small parcel will be prepaid into Itasca by client/supplier:  YES  NO

LTL/Parcel Terms into Itasca:  Prepaid  Collect[[1]](#footnote-1)

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

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

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

Consolidated order rating: Click here to enter text.

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

**US Customs Brokerage**

**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 USMCA? 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.

Percentage of shipments by mode of transport: Click here to enter text.

Ocean: Click here to enter text. Highway: Click here to enter text.

Air: Click here to enter text. Rail: Click here to enter text.

**Any additional clearance requirements:**

Arrange cartage: Click here to enter text.

Freight payments: Click here to enter text.

Prepare delivery order: Click here to enter text.

**Trade Compliance main contact:**

C-TPAT (Customs-Trade Partnership Against Terrorism) member?  Yes  No

If ‘yes’, please provide account number: Click here to enter text.

Do the following items apply to the goods you will be importing?

If ‘Yes’, then commercial invoice price must include the cost of these items:

* Packing costs:  Yes  No
* Buying or Selling commissions:  Yes  No
* Assists (items provided FOC or at reduced cost by buyer of merchandise for use in production or sale of the merchandise):  Yes  No
* Royalties or licensing fees:  Yes  No
* Proceeds of subsequent transactions that accrue to the seller:  Yes  No
* Does client take cash (terms) discounts:  Yes  No
* Any prepaid freight discounts:  Yes  No
* Any related vendors/suppliers:  Yes  No

**Are your imported goods subject to:**

Free Trade Agreements?  Yes  No

Anti-Dumping and Countervailing duty deposits?  Yes  No

Trademarks or copyrights?  Yes  No

Do you claim duty drawback on any goods exported from the U.S.?  Yes  No

Does your company hold any binding rulings?  Yes  No

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

**CAD Customs Brokerage**

**Please Have The Following Documents:**

Foreign Exchange Letter for US billed clients

GST Letter/Direct Security Letter/Release Prior to Payment Bond in CARM Client Portal Authorize/Delegate by Frontier

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 USMCA? 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.

Any additional clearance requirements: Click here to enter text.

Arrange cartage: Click here to enter text.

Freight payments: Click here to enter text.

Prepare delivery order: Click here to enter text.

Percentage of shipments by mode of transport:

Ocean: Click here to enter text. Highway: Click here to enter text.

Air: Click here to enter text. Rail: Click here to enter text.

CBSA audit results or rulings: Click here to enter text.

Past rulings provided: Click here to enter text.

Ruling requests required for future imports: Click here to enter text.

Valuation of goods: Click here to enter text.

Does client take cash (terms) discounts?  Yes  No

Any prepaid freight discounts?  Yes  No

Any related vendors/suppliers?  Yes  No

Value for Duty code required for above adjustments  Yes  No

Export from Canada:  Yes  No

Is export reporting required?  Yes  No

If yes, what is CAED authorization ID #?

**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.

Ancillary Fees: Click here to enter text.

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

**International Freight Forwarding**

**Please Complete The Following:**

US IFF  CAD IFF

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.

**Warehousing:**

**Please Complete the Following Prior to Implementation Meeting:**

Rate Sheet to a Team

Customer Information for Set up to [ar@frontierscs.com](mailto:ar@frontierscs.com) & a Team

Email address for shipment notifications: Click here to enter text.

**Warehouse Location:**

Itasca  Winnipeg  Vaughan

**Initial Inventory:**

Date to Be Received: Click here to enter text.

Volume: Click here to enter text.

**SKU List:**

SKU #s: Click here to enter text.

Product Description: Click here to enter text.

Dims in inches of each item shipped out: Click here to enter text.

Weight in lbs of each item shipped out: Click here to enter text.

Shipping Unit Type per SKU:  Eaches  Cartons

# of eaches per carton: Click here to enter text.

Packaging:  Provided  Frontier Supplied

Max and Min for Inventories: Click here to enter text.

Order Entry: Manual  CSV  Integration (IT, ex: Shopping Cart)

**Please Complete The Following:**

Type of Company:  B2C  B2B

Assembly/Kitting Needed: Click here to enter text.

Payment:  Collect  Pre-paid

Billing Frequency:  Daily  Weekly  Bi-Weekly

Billing Format:  Excel  PDF

Company Specific Packing Slips Required with outbound shipping:  Yes  No

Special Labeling requirements: Click here to enter text.

3PL Set Up: Click here to enter text.

Link and Process Docs sent to Client: Click here to enter text.

3PL Client Training: Click here to enter text.

Login: Click here to enter text.

Password: Click here to enter text.

**Webship Set Up for Tracking:**

Training:  Yes  No

Login: Click here to enter text.

Password: Click here to enter text.

Inventory Turnaround: Click here to enter text.

Inventory Replenishment Address: Click here to enter text.

Customers Address: Click here to enter text.

Over Seas: Click here to enter text.

Identify expected weekly volume: Click here to enter text.

Special Requirements: Click here to enter text.

**Check All That Applies:**

Delivery Appointments  Power Tail Gate  Hazardous Material

Food Products  Special Rates/discount levels  Fragile

Residential Deliveries  Inside Deliveries  Chep Pallets Needed

Walmart Deliveries/Amazon/Menards/Costco

**Invoicing**

Order Entry Deadline for Same day: 11:00 CST

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

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