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 & 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

**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 & 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)