



ChassisManager BCO Welcome Pack



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Welcome to IAS ChassisManager

Welcome to IAS ChassisManager! We are pleased to welcome you to the IAS Connected community. It is always exciting to bring in new members, even after on-boarding thousands of participating users worldwide, we still value each new participant as if they were among the first.

IAS supports a unique community of vendors and service providers to the global logistics industry who interact with our platform and applications to increase efficiency, visibility and customer service. Now that Hampton Roads Chassis Pool as a Direct-to-BCO customer has nominated you, we will move you into the on-boarding phase of the program.

This provides you with the basic information about the process of getting you up and running with IAS ChassisManager as quickly as possible. In addition to the “how-to” components of this package, there is an explanation of the process and data provisioning requirements that are necessary for successfully utilizing the ChassisManager platform. You should also have scheduled detailed system training from the IAS Chassis Support team in advance of receiving this document.

We strive to provide excellent customer service at all times and our professional client services team will be dedicated to guiding you through this process and will remain at your disposal throughout your many years of use of IAS ChassisManager.

We look forward to working with you, and we welcome your company to the IAS Connected network.

With Best Regards,

The IAS Team

What is ChassisManager?

ChassisManager is a usage tracking and day-lease billing solution for Chassis Pool Operators and Equipment Lessors, designed from the ground up to ensure accurate and timely billing while also addressing the evolving requirements of a rapidly changing chassis provisioning market. ChassisManager is delivered securely as Software-as-a-Service (SaaS), accessible 24/7 over the Internet with no requirement to install or maintain application components. Like an auto rental, a lease begins when the pool operator's equipment leaves a designated start stop location and ends when it is returned.

Unlike an auto rental, ChassisManager takes into account the complex day-lease billing rules associated with intermodal equipment:

- Multiple trip rentals, possibly over multiple days
- Multiple responsible lessee parties associated with different trips on the same rental
- Rental tax application
- Dispute (and resolution) of usage charges in advance of billing and invoicing

There are three primary components to the system:

Customer On-Boarding, User Registration and Administration

- ChassisManager establishes and enforces lessor acceptance criteria and business rules
- Ensures that users have up-to-date account profiles and have agreed to lessor terms and conditions
- Associates approved lessees with equipment movement
- Account user management – approval of new users, assignment of roles and permissions
- Billing account management

Event Management

- Chassis Service Providers send data as equipment moves out of and into their network of physical facilities
- Responsible third party lessees submit data to identify movement associated with their direct billing program requirements
- The system sorts, matches and collates this data on a daily basis creating a rental transaction
- When the equipment is returned, the system then prepares the transaction for rating and billing

- Generates exception reports to monitor the accuracy and timeliness of facilities' event reporting

Rating, Billing and Collections

- Evaluates the event and third party data to determine bill-to party, rates and duration of lease
- Customer review and dispute of charges prior to invoicing
- Statement distribution
- Secure online credit/debit card payment or ACH option
- Account history of invoices, payments, credits

How does ChassisManager work?

This section provides comprehensive detail that describes the end-to-end rental life cycle.

Background

ChassisManager is structured to address a dynamic marketplace that has evolved as ocean carriers divested their assets and exited the chassis provisioning business. In the new provisioning model, the initial concept deployed assumed motor carrier responsibility for chassis costs associated with the pickup or delivery of containerized cargo, consistent with operations in Europe and Asia.

However as shipping lines have transitioned into the new model, many continued to bear the costs on certain types of movement. Examples include, but are not limited to: carrier haulage when the shipping line pays for delivery to a customer location, exception per terms of customer contract or account, export pool bookings, empty repositioning, or land bridge moves.

The market is now entering a third phase of evolution, whereby beneficial cargo owners (BCO's) are taking on responsibility for chassis usage costs in a direct billing scenario.

The ChassisManager billing engine was designed from the ground up to manage complex billing rules and scenarios associated with this evolving marketplace.

By combining gate movement data with summary booking information from responsible third parties, that is ocean carriers and BCO's, ChassisManager is able to rate chassis usage and assign the charges to the appropriate party in a highly accurate and scalable platform.

Gate Movement Event Reporting

Chassis movement out of and into start/stop facilities is reported to ChassisManager in real time via electronic data interchange (EDI). A start/stop facility may be a marine terminal, railhead, container yard, chassis depot, inspection or other site designated by the Pool Operator (lessor).

When a motor carrier leaves a facility with the lessor's chassis, the information associated with that movement is captured in the facility's gate system. That system reports the movement to ChassisManager.

A rental starts when a motor carrier picks up a chassis for the first time. Each rental is tied to a specific chassis unit.

The facility will report to ChassisManager, among other items:

- Chassis identification number
- Container identification number
- Motor carrier ID code (SCAC) pulling the unit
- Ocean carrier ID code (SCAC) of the responsible ocean carrier whose box is on the chassis
- Booking or bill of lading number
- Direction of movement

Likewise, on the gate-in at the end of the move, the facility will report a gate-in event back to ChassisManager. When the gate-in is reported, ChassisManager matches it to the gate-out by using the motor carrier ID code and the chassis identification number

This gate-out and subsequent matching gate-in movement is what defines a **trip** in ChassisManager. Each trip has a pickup location, date/time and a return location, date/time. The move may be bare or laden, however only one container and one responsible party may be associated with any given trip.

The motor carrier may make several trips with the same chassis in the same day, or over any number of days. The rental remains in open status each day while ChassisManager has determined the last movement for that chassis is a gate out. The rental is considered returned when the motor carrier “gates in” the unit to a start/stop facility and no further movement is reported on it for that motor carrier for that day. All trips on a rental are rated once a return event has occurred or every 30 days whichever is sooner.

Responsible Third Party Lessee Reporting

The default bill to party for chassis day-lease billing is the motor carrier unless the movement is otherwise identified and marked by an authorized third party. These responsible third party lessees may be:

- Ocean Carriers (shipping lines)
- Beneficial Cargo Owners (BCO's)

ChassisManager provides a mechanism for additional types of lessees to identify designations for exception by utilizing summary shipment information; bills of lading or booking numbers combined with container numbers. This data is matched to the movement of equipment received from the start/stop locations while the rental remains active (“Open” status) and is then used by the billing engine to determine the bill-to-party and day rate.

To describe the process in more detail, third party lessees submit summary level data about the anticipated bookings and bills of lading movement to ChassisManager on a rolling 2- or 3-week forward view. This data is designated as the moves that the lessee expects to pay for the chassis usage.

As gate events are reported and processed from the start/stop facilities, ChassisManager evaluates the container number and booking numbers against those provided by the third party lessee. If a match is found, the system updates the trip associated with that movement and designates the third party as the bill-to party. Additionally, every time the third party lessee submits a “shipment file”, ChassisManager compares the new information to any moves currently in progress in an attempt to match exception-billing data to trips on an existing open rental.

BCO third parties simply submit the container numbers with their associated booking or bill of lading references in a simple flat file upload. BCO-matched trips visible in the ChassisManager system will reference:

- The BCO organization name
- The BCO ChassisManager organization code (provided by IAS)
- A “haulage type” value of “BC”

Ocean Carrier third parties with more complex matching criteria may utilize additional elements such as:

- Haulage Type
 - Carrier Haulage (CH)
 - Merchant Haulage (MH)
 - Empty Repositioning (MT)
- Contract Number

Trips in the system that are matched to an ocean carrier will reference:

- The shipping line standard carrier alpha code (SCAC)
- A haulage type of “CH” or “MT” (if provided)
- A contract reference (if provided)

When the rental is returned and the system rates it, this combination of organization references, haulage types and presence of contract content determine the correct bill-to party and rate.

Beneficial Cargo Owner Direct Billing

BCO Role and Responsibilities

As a partnered Beneficial Cargo Owner (BCO), you are able to upload data files to the IAS ChassisManager system to designate shipments for which you would like to be billed directly for the chassis usage.

The data file you upload is a summary of the bookings and or bills of lading, along with the corresponding container numbers associated with those shipments. The upload file is a simple, 5 column, comma separated (CSV) document that can be managed in a spreadsheet. More details about file format and data definitions are provided in this document.

It is important that data files are uploaded in a timely manner.

For import moves, it is recommended to load the information into ChassisManager as soon as bill of lading information is confirmed after departure from port of origin. Manifest reporting to Customs is typically a good trigger event for sending import lists.

For export moves, timeliness is of utmost importance. Data files for exports should be submitted to ChassisManager *the same day* that the container number is identified for the movement.

It is the BCO's responsibility to ensure this information is correct and processes with the desired effect. If data uploads or transmissions are either missing or unsuccessful, the billing will default to the motor carrier who will in turn rebill you for the charges.

BCO Nomination

Since you have this document, we assume you've already contacted the lessor (pool operator) to initiate the process. Lessors will have reviewed their program specifics with you and engaged IAS for fulfillment.

In addition to this document, IAS will have also:

- Issued a 4 character, alphanumeric party code that will be used to identify the organization within the ChassisManager system
- Scheduled and possibly attended a web-based program overview and hands on system training

Please contact IAS ChassisManager support directly if you have not been provided with these materials: chassis@interasset.com or 510-844-3000 Option 5.

Information in the following sections of this document should have been covered in your ChassisManager training session. Please keep this document handy as a reference as required. The materials may also be found on the IAS Support Portal:

<https://iassupport.zendesk.com/home>

BCO Setup – Account and User Registration

Since you have this document, we assume you've already contacted the lessor (pool operator) to initiate the process. Lessors will have reviewed their program specifics with you and engaged IAS for fulfillment.

Now that you have been nominated to participate in the BCO Billing Program, the next step is to sign up and register in ChassisManager.

To get started, go to <https://chassismanager.interasset.com> and click on the Register button

CHASSIS

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Email:

Password:

[Log In](#)

[Register](#) [Forgot Password](#)

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Registration Instructions

Step 1 – Establish a User Name



The screenshot shows the 'User Registration (Step 1)' form for IAS CHASSIS. The form includes the following fields and sections:

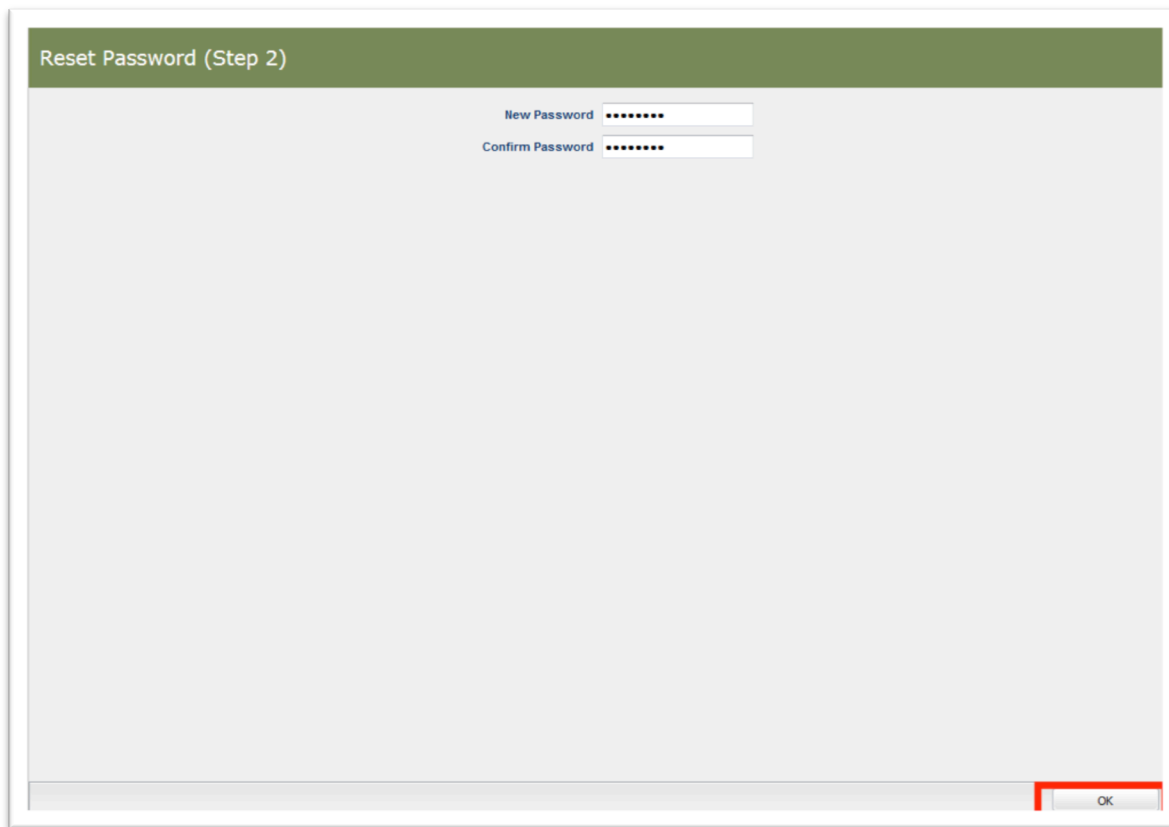
- Header:** IAS CHASSIS logo and 'User Registration (Step 1)' title.
- Your email:** A text input field containing 'name@company.com'.
- Confirm email:** A text input field.
- Name:** Two text input fields labeled 'First' and 'Last'.
- Company Name:** A text input field.
- Job Title:** A text input field.
- Phone:** A text input field.
- Privacy Notice:** A line of text stating: 'Help us protect your privacy. Enter the letters that appear in the image below to make sure your information remains secure from automated programs.'
- Image:** A small image showing a document with the number '176' and some text.
- Register Button:** A button labeled 'Register' located at the bottom right of the form.

The first step is to establish a username. A valid email address is required. Fill in the information and click on Register to proceed.

A temporary password will be emailed to the email address you provided. If you do not provide a valid email address, you will not receive a temporary password and will not be able to proceed.

For security purposes, IAS does not recommend the use of group or shared logins. ChassisManager allows you to maintain sensitive and potentially confidential billing information about your company. As a result, each user of your company should use a unique email as user identification and assigned roles and permissions accordingly.

Step 2 – Create a Password



Reset Password (Step 2)

New Password

Confirm Password

OK

Log in to the ChassisManager system using your valid email and the temporary password provided. Please enter it in exactly how it was sent with no spaces at the beginning or end. Be careful if you are copying or pasting.

You will be prompted to create a password you can easily remember. Please be sure to create a strong password that you can easily remember, but cannot be easily hacked. We recommend at a minimum 8 alphanumeric characters with at least one capital letter and one number or special character. Remember, this is YOUR Company's potentially sensitive and confidential shipping and billing information.

Step 3 – Select the service and identify your company

Complete your Profile (Step 3)

Please Select Service ChassisManager

Please Select Company Type Beneficial Cargo Owner

Please Provide Company Code or SCAC RBC1

Submit

Complete your profile as follows:

1. **Service** = “ChassisManager”
2. **Company Type** = “Beneficial Cargo Owner”
3. **Company Code** = the 4-character alphanumeric code provided to you by your lessor or IAS Support exactly as it was issued, e.g., “XXXX”.

Step 4 – Complete the Profile

The screenshot shows the 'Company Registration (Step 4)' page for the IAS CHASSIS system. The page has a dark blue header with the IAS CHASSIS logo. Below the header is a green bar with the title 'Company Registration (Step 4)'. A red-bordered box contains a thank-you message: 'Thank you for completing your ChassisManager sign up. The next step is to sign in to the system to complete your billing profile and click through your Equipment Provider's terms and conditions. For more information, please refer to the email sent in confirmation of reaching this step of registration.' Below this message is a form with the following fields: Company Name (text input with 'Register BCO'), Country (dropdown menu with 'United States of America'), Address 1 (text input with '123 Main Street'), Address 2 (text input), City (text input with 'Oakland'), State (text input with 'California'), Postal Code (text input with '94607'), Currency (dropdown menu with 'US Dollar'), Phone (text input with '510-844-3000'), Fax (text input), and URL (text input). A 'Proceed to login' button is located at the bottom right of the form.

IAS CHASSIS

Company Registration (Step 4)

Thank you for completing your ChassisManager sign up. The next step is to sign in to the system to complete your billing profile and click through your Equipment Provider's terms and conditions. For more information, please refer to the email sent in confirmation of reaching this step of registration.

Company Name: Register BCO

Country: United States of America

Address 1: 123 Main Street

Address 2:

City: Oakland

State: California

Postal Code: 94607

Currency: US Dollar

Phone: 510-844-3000

Fax:

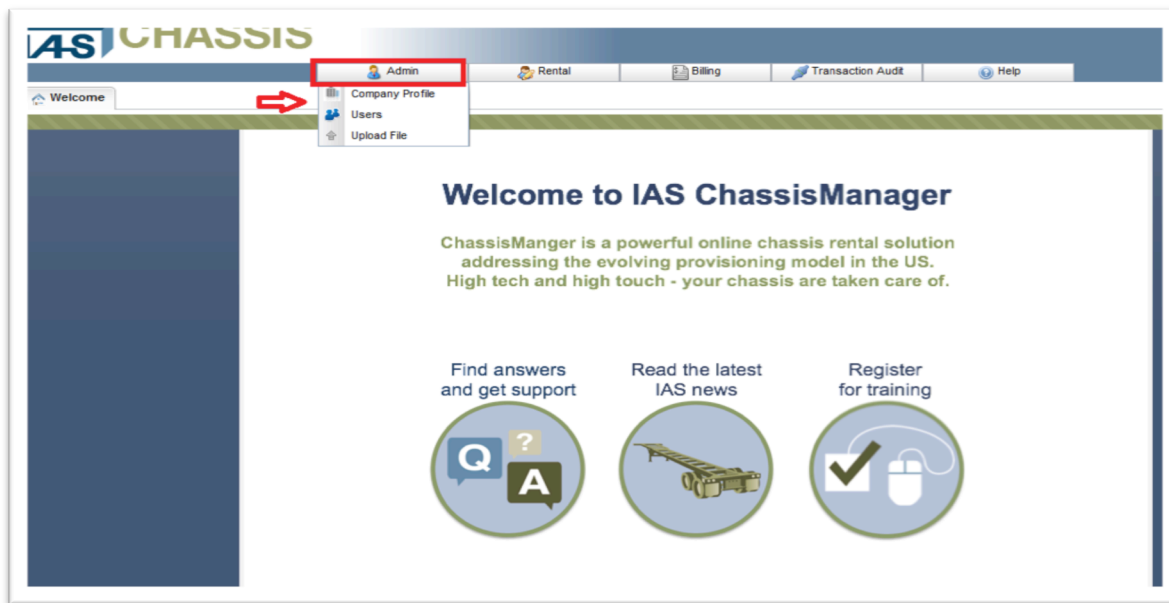
URL:

Proceed to login

Complete the company information requested for the profile exactly as it should read on your billing statements.

If you have a distinct billing address, you will have the opportunity to manage that in your account profile later.

Step 5 – Account Management, Lessor Terms and Conditions



Now that your user and account profile are completed, you can sign in to ChassisManager with your new password.

Select “Company Profile” from the “Admin” menu.

Under “Company Information” you may update your billing address if it is different from your organization’s physical service address. You may copy the physical address information over completely or enter in a distinct billing address if needed.

Log Out registerbco@gmail.com

Admin Rental Billing Transaction Audit Help

Welcome Company

Company > Register BCO

Required fields marked with (*).

Company Information

Name*: Register BCO

City: Oakland

Postal Code: 94607

Currency: US Dollar

Address 1: 123 Main Street

State/Province: California

Phone: 510-844-3000

URL:

Address 2:

Country: United States of America

Fax:

Code: RBC1

☒ Copy Billing Address from Service Address

Billing Address 1*: 123 Main Street

Billing State/Province*: California

Billing Address 2:

Billing Postal Code*: 94607

Billing City*: Oakland

Country*: United States of America

Terms & Conditions

Comments

Save

Under “Terms & Conditions”, select and view the terms sheet for your lessor (pool operator). In order to proceed you must click through and agree to the lessor terms and conditions for chassis day use.

IAS CHASSIS

Admin Rental Billing Transaction Audit Help

Welcome Company

Company > BCO Logistics

Required fields marked with (*).

Company Information

Terms & Conditions

| Equipment Provider | View Terms & Conditions | Status | Accepted By | Accepted Date |
|---------------------------|-------------------------|--------|-------------|---------------|
| Oceanic Shipping | View | | | |
| HRCF | View | | | |
| VV Equipment Provider 1 | View | | | |
| Container Navigation Corp | View | | | |
| NYK Line (NA) Inc. - SACP | View | | | |
| NYK Line (NA) Inc. - COCP | View | | | |
| NYK Line (NA) Inc. - GCCP | View | | | |
| NYK Line (NA) Inc. - MCCP | View | | | |

Comments

Save

Once you have clicked through the terms and conditions, the lessor customer service administrators will be notified. Upon review and confirmation that all information is complete, your account registration will be approved. The approval should take no more than one business day to complete.

Submitting BCO Data

BCO's are required to upload/send data to ChassisManager to identify the moves for which they authorize direct billing.

The data file is a summary of the bookings and or bills of lading, along with the corresponding container numbers associated with those shipments. The upload file is a simple, 5-column, comma separated (CSV) document that can be managed in a spreadsheet.

It is important that data files are uploaded in a timely manner.

For import moves, it is recommended to load the information into ChassisManager as soon as bill of lading information is confirmed after departure from port of origin. Manifest reporting to Customs is typically a good trigger event for sending import lists.

For export moves, timeliness is of utmost importance. Data files for exports should be submitted to ChassisManager *the same day* that the container number is identified for the movement.

It is the BCO's responsibility to ensure this information is correct and processes with the desired effect. If data uploads or transmissions are either missing or unsuccessful, the billing will default to the motor carrier who will in turn rebill you for the charges.

File Format

The BCO Data file is a 5-column, comma separated (CSV), tabular layout that can be managed in a spreadsheet or text editor.

Files must be saved as ".csv" format. Each line of data corresponds to a specific shipment and requires the following elements:

| Column Number | Column Content (Header) | Description | Presence |
|---------------|-------------------------|--|-----------|
| 1 | Reference Type | BL for Bill of Lading BN for Booking Number | Mandatory |
| 2 | Reference Number | Actual ocean carrier bill of lading or booking number <i>Note: if the ocean carrier bill of lading or booking number in your system includes the ocean carrier's 4-character identifier at the start of the number (e.g., APLU123456789), DO NOT include that identifier when sending data to ChassisManager.</i> | Mandatory |
| 3 | Container Number | 4 alpha/6 or 7 numeric container ID <i>The check digit may be included but is not required.</i> | Mandatory |
| 4 | Pool Operator ID | Lessor/Pool Operator ID code provided by the IAS Chassis Team. | Mandatory |
| 5 | Sender ID | Your 4-character alphanumeric company code provided at nomination. <i>This data element will be the same for each row of information.</i> | Mandatory |

Pool Operator ID's for Participating Lessors

| Lessor | Code |
|----------------------------------|------|
| Hampton Road Chassis Pool (HRCP) | XXQI |

Sample BCO Data File

The column headers are mandatory when creating your document. The data within the fields are case sensitive. Please insure all alpha characters are in UPPER case.

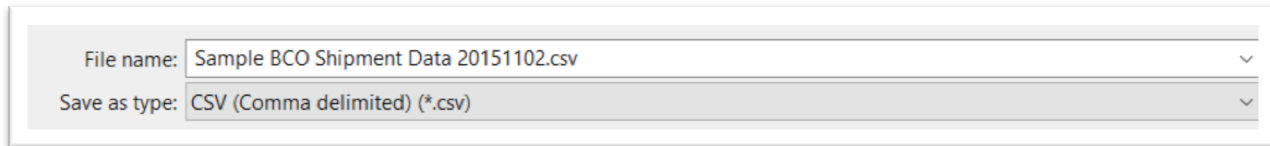
This sample displays the file when in tabular format such as within a spreadsheet (e.g. Microsoft Excel)

| Reference Type | Reference Number | Container Number | Pool Operator ID | Sender ID |
|----------------|------------------|------------------|------------------|-----------|
| BL | 12345ABC | HLCU1234567 | XXQI | BCO1 |
| BN | 989503ABC | KKNU123456 | XXQI | BCO1 |

Viewed in a text editor, the same file looks like this:

```
Reference Type,Reference Number,Container Number,Pool Operator ID,Sender ID  
BL,12345ABC,HLCU1234567,XXQI,LMB1  
BN,989503ABC,KKNU123456,XXQI,LMB1
```

When managing CSV files in a spreadsheet program, be sure to save your file AS “CSV (Comma delimited) (*.csv)”. Files submitted as .xls or .xlsx format will not be accepted.



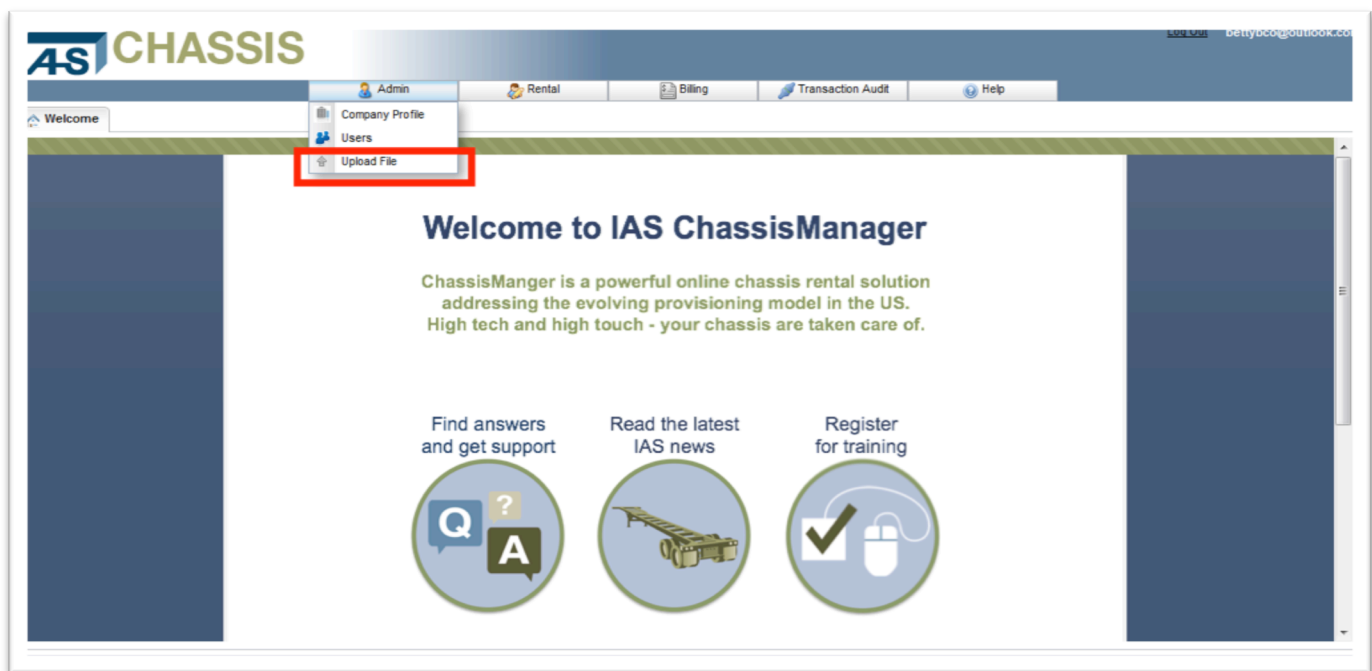
File name: Sample BCO Shipment Data 20151102.csv
Save as type: CSV (Comma delimited) (*.csv)

Data Upload Process

The primary method by which data can be submitted to ChassisManager is via file upload in the ChassisManager user interface.

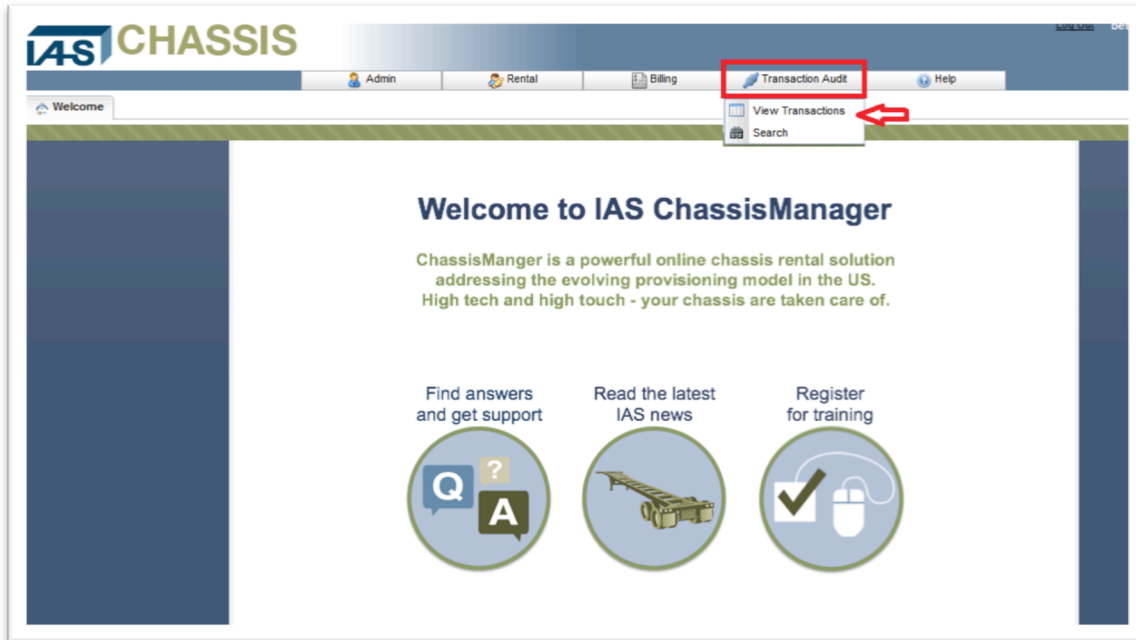
For BCO's requiring system-to-system options, please contact IAS support to arrange for a secure SFTP login for file transfer. IAS supports thousands of transportation service providers and trading partners over SFTP world-wide and can provide additional services for automated data transfer and monitoring upon request.

File Upload



Sign in to ChassisManager, go to the ADMIN menu and select UPLOAD FILE. A dialog will appear requesting you to locate and attach your file. Select your file, verify the correct filename and submit.

Validating a Successful Upload



To verify the file was processed, go to the TRANSACTION AUDIT menu and select VIEW TRANSACTIONS.

The Transaction Audit displays the history of your file uploads and the status of each row submitted.

The screenshot shows the 'Transaction Audit' page in the IAS CHASSIS Manager. The page displays a table with transaction history. The 'Status' column is highlighted with a red box. The table has columns for Document Type, Activity, Sender, Source, File Name, Sender Transaction Number, Unit Number, Message Sent, Message Received, Status, Current State, Transaction ID, and Next State. Two rows of data are visible, both with a 'Success' status.

| Document Type | Activity | Sender | Source | File Name | Sender Transaction Number | Unit Number | Message Sent | Message Received | Status | Current State | Transaction ID | Next State | Tr |
|---------------|----------|--------|--------|--------------------|---------------------------|-------------|------------------|------------------|---------|---------------|----------------|------------|----|
| BCOData | CREATE | B59 | EDI | BCO_BBY1_DEC9_bby1 | 955208089 | MWCU6923309 | 12/09/2015 10:59 | 12/09/2015 10:59 | Success | updated | 4136282 | | |
| BCOData | CREATE | B59 | EDI | BCO_BBY1_DEC9_bby1 | TSNUAR900116 | CCLU7175403 | 12/09/2015 10:59 | 12/09/2015 10:59 | Success | updated | 4136283 | | |

The grid is highly searchable and customizable. Use the “Quick Search” magnifying glass tool to search by column. You can also sort in ascending or descending order on any column displayed. Columns may be repositioned and you may save customized layouts if desired.

Of particular note for BCO uploads:

- Filename
- Sender Transaction Number – the booking or bill of lading number
- Unit Number – the container number associated with the BN/BOL
- Message Received – date/time message received
- Status – indicates Success/Failure

A Status = “Success” means the row was processed by the system and stored in the database. It does not mean that the data is matched to an existing trip.

If the status shows “Failure”, your upload was not successful. Highlight the line item and review the error message in the child window at the bottom of your screen. Correct the error in a new file and resubmit.

The screenshot shows the 'TAR > Manage' interface. At the top, there's a 'View: All' dropdown. Below it is a table with columns: Document Type, Activity, Sender, Source, File Name, Sender Transaction Number, Unit Number, Message Sent, Message Received, Status, and Cur. The 'Status' column is highlighted with a red box. The table contains four rows of data, with the last two rows showing 'Failure' in the Status column. Below the table is an 'Errors' window with a red border, containing two error messages:

| Error Code | Error Description |
|------------|---|
| CMS13064 | Missing required fields: Bill of Lading or Booking Number |
| ZZZ-9995 | Missing BOLBN Number or unknown BOLBN Reference Type code |

Matching BCO Data to Movement

Your data is matched to rentals in the following ways:

1. **Upon Submittal of Data File:** when you submit your file, the system immediately goes out to the existing population of rentals in OPEN status and looks to seek a match based on your BN/BOL-Container Number combination. If a matching trip is found, it will be updated with your BCO information and you will be able to view it immediately on the system.

2. **As Movement Occurs:** as equipment movement is processed each night, every time a new rental or trip begins, the system checks the BCO Data table to determine if any matches can be made. If a match is found, the trip is updated with the BCO reference information. Because new movement is processed each night, it is advisable to check the system for matches each day as a part of your upload process.

Rental Life Cycle

This section covers how you view and manage trips once your BCO Data has been matched.

Equipment movement in ChassisManager becomes visible to the BCO user only after a match has been made. For privacy and purposes of sensitive information, the various lessee parties may only view and manage rental trip information where they are marked as a responsible transportation and/or billing party.

Open Rentals

Any rental where the chassis unit is out and on the road will be marked as Status = “Open”.

The rental starts when a motor carrier (trucking company) exits a start/stop facility with one of the lessee’s units. The chassis may be bare or laden with a shipping container.

A rental may last for several days and the motor carrier may make multiple trips over the course of a rental and within the same calendar day.

- If the last movement of the chassis with that motor carrier on a rental is a “Gate Out”, the rental remains open.
- If the last movement of the chassis with that motor carrier on a rental is a “Gate In”, the rental is considered returned.

Return conditions are evaluated shortly after midnight for the day prior.

This is important to remember since an individual trip within a rental may occur within one day, but if the motor carrier continues to utilize the chassis over several days, the usage does not rate until the motor carrier has given up possession of the asset and the return event occurs. The exception being for longer term rentals, the system automatically rates at 30 day intervals until a physical return is encountered.

To view rentals in Open status, sign in to ChassisManager and select “Manage Trips” from the “Rentals” menu.

Select the “Quick Search” magnifying glass from the toolbar to open search by column, then select “Open” from the Rental Status column. Return key or the filter “funnel” on the far right hand side will commit your filter.

| Rental Status | Invoice Number | Rental Start Date | Rental Start Location | Rental End Date | Rental End Location | Rental Number | Container Number | Chassis Number | Motor Carrier Name | Trip Number | Pickup Date | Return Date | Review Flag |
|---------------|----------------|-------------------|--------------------------------|-----------------|---------------------|---------------|------------------|----------------|---------------------------|-------------|------------------|-------------|-------------|
| Open | | 12/12/2015 10:30 | Portsmouth Container Yard | | | XXQ1659914 | OOLU9310977 | HRG2427716 | Bridge Terminal Transport | 1 | 12/12/2015 10:30 | | Pc |
| Open | | 12/12/2015 09:44 | Virginia International Gateway | | | XXQ1659873 | MOTU1415351 | FLX2407524 | Bridge Terminal Transport | 2 | 12/12/2015 09:57 | | Pc |
| Open | | 12/11/2015 14:24 | Portsmouth Marine Terminal | | | XXQ1659829 | OOLU8172322 | EMCZ741237 | Bridge Terminal Transport | 2 | 12/11/2015 14:39 | | Pc |
| Open | | 12/11/2015 13:19 | Virginia International Gateway | | | XXQ1658867 | MSKU6398005 | DCSZ723747 | Bridge Terminal Transport | 1 | 12/11/2015 13:19 | | Vh |
| Open | | 12/11/2015 13:04 | Portsmouth Container Yard | | | XXQ1658819 | CMAU4579382 | FLX2426650 | Bridge Terminal Transport | 1 | 12/11/2015 13:04 | | Pc |
| Open | | 12/11/2015 12:28 | Virginia International Gateway | | | XXQ1658713 | TOLU5446040 | TRLZ145149 | Bridge Terminal Transport | 1 | 12/11/2015 12:28 | | Vh |
| Open | | 12/11/2015 12:16 | Norfolk International Terminal | | | XXQ1658686 | TOLU8926758 | APLZ419942 | Bridge Terminal Transport | 1 | 12/11/2015 12:16 | | Nc |

The trip viewer presents detailed information about the movement where your BCO Data has matched to a trip on rental. As with all ChassisManager grids, the view is fully searchable and highly customizable to suit your specific purposes. You may also export the grid as a .CSV formatted file for analysis in a spreadsheet. The IAS ChassisManager support team will provide you with training on this functionality.

Columns of special interest for BCO's:

- Rental Status – displays the status of the rental
- Rental Number – is the rental number reference
- Container Number
- Chassis Number
- Motor Carrier Name – name of the trucking company moving the equipment
- Trip Number
- Pickup Date – date and time the trip started
- Return Date – date and time the trip finished
- Bill of Lading/Booking Number
- Haulage Type – BC indicates the trip is marked and identified to bill direct to BCO
- Shipping SCAC – standard carrier alpha code (SCAC) for the ocean carrier responsible for the container on the chassis
- BCO Code – your 4-character alpha-numeric ChassisManager code
- Billed Party SCAC – displays the billed party code after the return is processed
- Charges – displays the calculated charges for the trip after the return is processed
- Review Flag – indicates whether the billed party has reviewed the trip or not

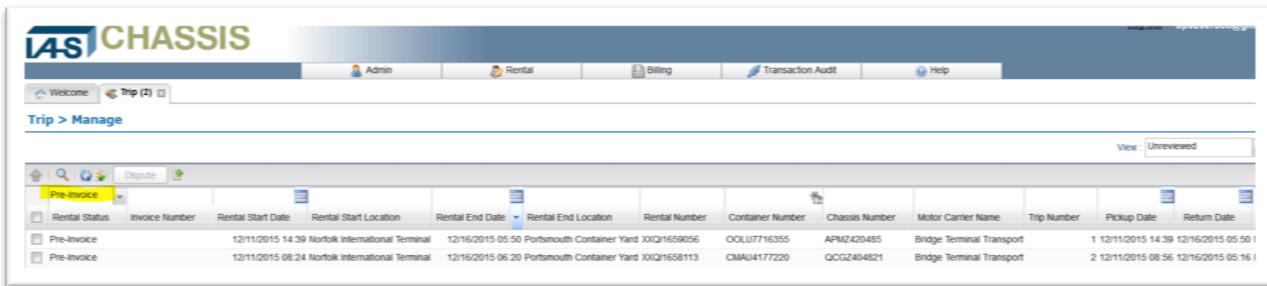
Pre-Invoice Rentals

When the chassis is returned to one of the lessee's start/stop locations, the entire rental transaction is processed. Each trip on the rental is evaluated for duration and the charges are calculated for the identified bill-to party. This process occurs nightly for all return events that occur the prior day.

BCO's are advised to get in the habit of reviewing rentals in Pre-Invoice status on a regular basis. Rentals are held in Pre-Invoice status for a minimum of 5 days to allow time for customer review of charges and, if required, to dispute any questionable activity.

Most ChassisManager lessee's bill on a twice-monthly cycle, meaning returns processed at the beginning of a service period will persist in Pre-Invoice status longer than those processed toward the end. By reviewing every day, or on regular frequency throughout the week, the BCO can manage review and dispute with minimal effort.

To view rentals in Pre-Invoice status, use the Trip Viewer and select "Pre-Invoice" from the Rental Status column of the grid.



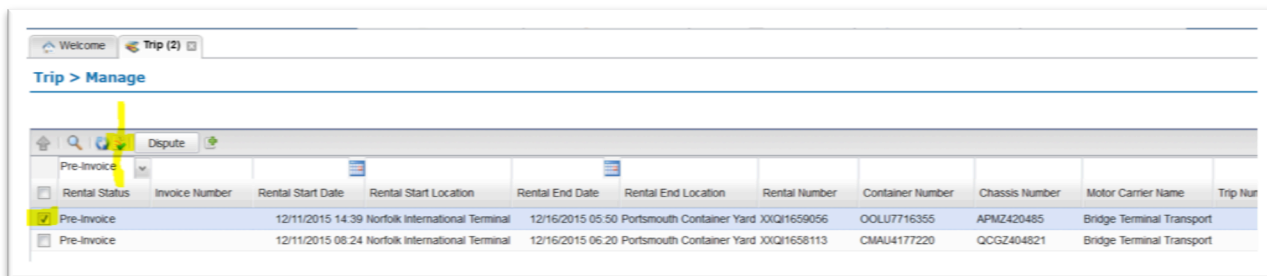
The screenshot shows the CHASSIS Trip Viewer interface. At the top, there's a navigation bar with 'Welcome', 'Trip (2)', and buttons for 'Admin', 'Rental', 'Billing', 'Transaction Audit', and 'Help'. Below this is a 'Trip > Manage' section with a 'View: Unreviewed' dropdown. A toolbar contains icons for 'Pre-Invoice', 'Dispute', and a green plus icon. The main table lists rentals with columns: Rental Status, Invoice Number, Rental Start Date, Rental Start Location, Rental End Date, Rental End Location, Rental Number, Container Number, Chassis Number, Motor Carrier Name, Trip Number, Pickup Date, and Return Date. Three rows are visible, all with 'Pre-Invoice' status.

| Rental Status | Invoice Number | Rental Start Date | Rental Start Location | Rental End Date | Rental End Location | Rental Number | Container Number | Chassis Number | Motor Carrier Name | Trip Number | Pickup Date | Return Date |
|---------------|----------------|-------------------|--------------------------------|------------------|---------------------------|---------------|------------------|----------------|---------------------------|-------------|------------------|------------------|
| Pre-Invoice | | 12/11/2015 14:39 | Norfolk International Terminal | 12/16/2015 05:50 | Portsmouth Container Yard | XXIQ1659056 | OOLU7716355 | APMZ420485 | Bridge Terminal Transport | 1 | 12/11/2015 14:39 | 12/16/2015 05:50 |
| Pre-Invoice | | 12/11/2015 08:24 | Norfolk International Terminal | 12/16/2015 06:20 | Portsmouth Container Yard | XXIQ1658113 | CMAU4177220 | QCGZ404821 | Bridge Terminal Transport | 2 | 12/11/2015 08:56 | 12/16/2015 05:16 |

Reviewing Rentals in Pre-Invoice Status

Verify the charges on the trip row. The number of days out corresponds to the difference between the "Return Date" and the "Pickup Date" on the trip INCLUSIVE OF THE PICKUP DATE. Divide the total charges by the number of days to confirm your rate.

To mark the trip as Reviewed, select the trip by ticking the checkbox on the far left column. Use the "Review" button on the toolbar to mark the trip.



This screenshot is similar to the previous one, but the first row in the table is highlighted in blue, and a yellow arrow points to the 'Review' button (a blue circle with a white checkmark) in the toolbar. The 'Pre-Invoice' dropdown is also open, showing 'Pre-Invoice' as the selected option.

| Rental Status | Invoice Number | Rental Start Date | Rental Start Location | Rental End Date | Rental End Location | Rental Number | Container Number | Chassis Number | Motor Carrier Name | Trip Number |
|---------------|----------------|-------------------|--------------------------------|------------------|---------------------------|---------------|------------------|----------------|---------------------------|-------------|
| Pre-Invoice | | 12/11/2015 14:39 | Norfolk International Terminal | 12/16/2015 05:50 | Portsmouth Container Yard | XXIQ1659056 | OOLU7716355 | APMZ420485 | Bridge Terminal Transport | 1 |
| Pre-Invoice | | 12/11/2015 08:24 | Norfolk International Terminal | 12/16/2015 06:20 | Portsmouth Container Yard | XXIQ1658113 | CMAU4177220 | QCGZ404821 | Bridge Terminal Transport | 2 |

Marking a trip as "Reviewed" is a tool for filtering out activity that you no longer need to look at. It does not change the status of the trip, but simply allows you to filter it away from your screen and focus on un-reviewed activity.

Disputing Rentals in Pre-Invoice Status

If you determine there is an issue with a trip where you've been designated the bill to party, you may dispute it here before an invoice is issued. This is your opportunity to check and balance the gate reporting before you receive a payable for the usage. By managing disputes up front, you alleviate back end payment and accounting issues.

To dispute a trip, select it by ticking the checkbox on the far left column. Use the "Dispute" button on the toolbar to mark the trip. You may only dispute a trip if it is in "Pre-Invoice" status.

The screenshot shows the CHASSIS system interface. At the top, there's a navigation bar with tabs: Admin, Rental, Billing, Transaction Audit, and Help. Below this, a breadcrumb trail shows 'Trip > Manage'. A toolbar contains a 'Dispute' button with a plus icon. Below the toolbar is a table of trips. The first two rows are in 'Pre-Invoice' status. The second row is selected, and its details are shown below the table: Rental Number > XXQ11658113, Chassis Number > QCG2404821, Trip Number > 2. Below this, there's a 'Trip Comments' section with a table for comments, attachments, and private notes. The table is empty, with a message 'No records found for the selected record.'

A dispute form will be presented to you to provide further information.

The screenshot shows the 'Dispute' form. It has two main sections: 'Trip Details' and 'Dispute Details'. The 'Trip Details' section contains fields for Trip Number (2), Revision Number (3), Pickup Date (12/11/2015), Pickup Location (Portsmouth Container Yard), Return Date (12/16/2015), Return Location (Norfolk International Terminal), Container Number (CMAU4177220), Bill of Lading, Booking Number (CAN0304035), Service Contract Number (CQNAM045906), Haulage Type (BC), Consignee Name, Shipping Name (Cma-Cgm), Shipping SCAC (CMDU), BCO Name (Bass Pro Shop), BCO Code (BPS1), Trip Duration (6), Adjusted Days, Base Rate, Invoice Number, Charges (USD) (76.5), Billed Party SCAC (BPS1), Billed Party Account Number (HRCP-1214), Original Service Contract Number, and Original Shipping SCAC. The 'Dispute Details' section contains a 'Dispute Category' dropdown (set to 'Incorrect Number Days Off'), a 'Dispute Status' dropdown (set to 'New'), a text area for comments (containing 'This chassis was returned a day earlier than reported'), and a 'Supporting Document' section with a 'Browse...' button and 'No file selected.' text. At the bottom right, there are 'Dispute' and 'Cancel' buttons.

- **Dispute Category:** Select the type of dispute from the pick list
- **Comments:** Provide a description or narrative
- **Supporting Document:** Upload any files related to the dispute that will help customer service resolve it quickly for you

Upon completing the dispute form, the rental will be transitioned to “In Dispute” status. While in this status, the usage on the rental will not be billed. The rental will stay in this status until the dispute is resolved.

Remember there may be other trips on the same rental that are assigned to other bill to parties. You may find a rental in dispute where another party has disputed a different trip. Your usage billing will be delayed until all disputes on the rental are resolved one way or the other.

To view and check the status of In Dispute rentals, select “In Dispute” from the “Rental Status” column of the Trip Viewer.

The screenshot shows the 'Trip > Manage' interface. At the top, there's a 'View' dropdown set to 'Unreviewed'. Below is a table with columns: Rental Status, Invoice Number, Rental Start Date, Rental Start Location, Rental End Date, Rental End Location, Rental Number, Container Number, Chassis Number, Motor Carrier Name, Trip Number, Pickup Date, and Return. One row is highlighted in red, indicating it is 'In Dispute'. Below the table, there are filters for Rental Number, Chassis Number, and Trip Number. At the bottom, there are tabs for 'Trip Comments', 'Created Date', 'Created By', 'Comments', 'Attachment', and 'Private'.

You will notice that trips where the rental is in dispute are marked in red. To view the status of the disputed trip, double click the row.

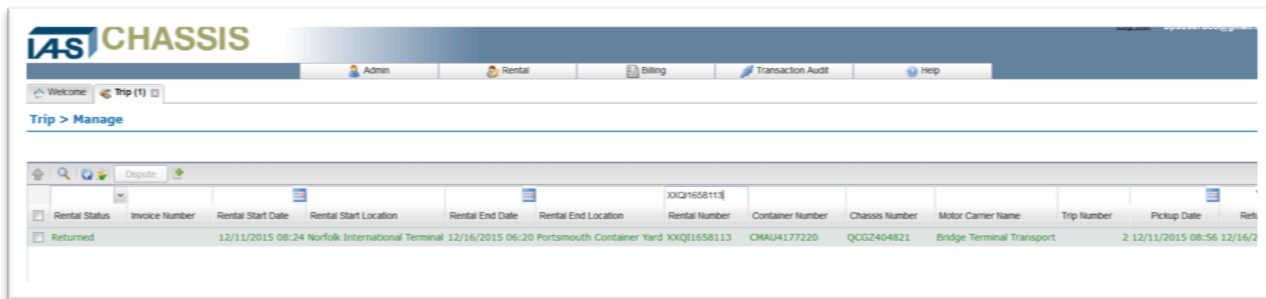
The screenshot shows the 'Dispute Management' form. It includes fields for 'Dispute Category' (set to 'Incorrect Number Days'), 'Dispute Status' (set to 'Open'), and 'Dispute Root Cause'. There are also fields for 'Age', 'Created By', 'Adjusted Days', 'Resolution Date', 'Last Modified', 'Billing Event Date', 'Created Date', and 'Last Modified By'. Below these fields, there are tabs for 'Comments', 'Supporting Document', 'Submitted By', and 'Submitted On'. The 'Comments' tab is active, showing two entries: 'Thank you for bringing this to our attention. We are currently reviewing your dispute on it' and 'This chassis was returned a day earlier than reported'.

You will be able to see if the status of the dispute has been updated:

- New – the dispute has been claimed and the rental is excluded from billing
- Open – customer service is working on the dispute
- Approved – the dispute is approved
- Rejected – the dispute is rejected

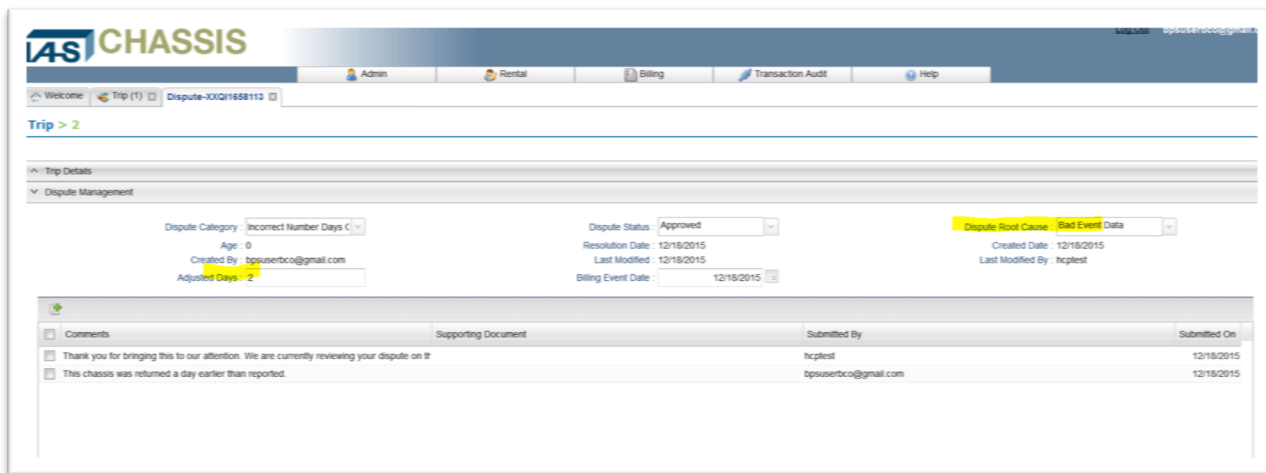
You will also be able to review any comments that have been made on the dispute.

When the dispute is resolved (Approved or Rejected) its status will again be updated to “Pre-Invoice”, and you will notice it is now marked in green.



| Rental Status | Invoice Number | Rental Start Date | Rental Start Location | Rental End Date | Rental End Location | Rental Number | Container Number | Chassis Number | Motor Carrier Name | Trip Number | Pickup Date | Rel |
|---------------|----------------|-------------------|--------------------------------|------------------|---------------------------|---------------|------------------|----------------|---------------------------|-------------|------------------|---------|
| Returned | | 12/11/2015 08:24 | Norfolk International Terminal | 12/16/2015 06:20 | Portsmouth Container Yard | XXQ11658113 | CMU4177220 | QCG2404821 | Bridge Terminal Transport | 2 | 12/11/2015 08:56 | 12/16/2 |

Double click the trip to review the resolution notes:



Dispute Category: Incorrect Number Days C

Age: 0

Created By: bpsuserbco@gmail.com

Adjusted Days: 2

Dispute Status: Approved

Resolution Date: 12/18/2015

Last Modified: 12/18/2015

Billing Event Date: 12/18/2015

Dispute Root Cause: Bad Event Data

Created Date: 12/18/2015

Last Modified By: hcplest

| Comments | Supporting Document | Submitted By | Submitted On |
|--|---------------------|----------------------|--------------|
| Thank you for bringing this to our attention. We are currently reviewing your dispute on it. | | hcplest | 12/18/2015 |
| This chassis was returned a day earlier than reported. | | bpsuserbco@gmail.com | 12/18/2015 |

In this case, the trip was adjusted 2 days and the root cause was updated to “Bad Event Data” to indicate the start/stop facility sent erroneous information.

Generally, disputes can be categorized as:

1. **Duration** – in which case the number of days can be adjusted downward to bill accurately
2. **Bill To Party** – in which case the bill to party can be adjusted to direct the billing to the correct party

Burden of proof on disputes is the responsibility of the disputing party. For duration disputes, a Trucker Interchange Report (TIR) showing the correct pickup or delivery time is usually sufficient for resolution. For bill to party disputes, specifically for BCO's, these will likely be a result of late or incorrectly entered BCO Data. Customer service will typically work with the BCO to resolve this class of dispute and help the BCO take actions to minimize BCO data reporting issues going forward.

Billing, Payments and Collection

Billing is generated on twice-monthly bill cycles, split into “service periods” for usage occurring:

- 1st-15th of a month
- 16th-last day of the month

Bill cycles are approved and statements are issued via email on the 21st and 6th of each month for the bill cycle completed 5 days prior. Should the 21st or 6th fall on a weekend or holiday, statements are issued on the business day immediately following.

Invoices and statements are distributed by email to a designated mailbox on the date of billing but all invoices and their backup are available for review on the ChassisManager portal at any time for user's convenience.

Designating the Invoice Recipient

By default, the invoice recipient email is the email of the original user who registers for ChassisManager. To change the email, please contact IAS Chassis Support at chassis@interasset.com.

To distribute the invoice to a group within your organization, please have your internal IT department set up a group internal distribution and forward that email to the IAS Support team.


IAS recommends group distributions over individuals so there is always back up in the event a receivables contact is unavailable for any reason.

How to Read your Statement

The twice monthly statement is comprised of a summary PDF document and detailed backup in the form of a comma-separated file (.csv) that can be analyzed in a spreadsheet.

You may also obtain information directly from the ChassisManager portal by searching your trips by Invoice number.

Summary PDF

|  The Hampton Roads Chassis Pool | | Invoice Number: 46384HRCP Invoice Date: 08/13/15 Account Number: HRCP-1096 Terms: Net 30 Chassis Rental Period: | | | | | | | | | | | | | | | | | | | | | | | | |
|--|---------------------|---|------------------------------|--|------------------|-------------|------------------------------|---------------|---------------------|--------|---------------------------------------|---------|----------------|---------------------|--------------------------|--|------------------------|---------|---------------|--------|-------|--------|-----------------------------------|----------------|------------------------------------|--|
| Oaktown Trucking Invoice Dept. 1200 Broadway address21 Oakland, WA 94607 UNITED STATES | | <table border="1"> <thead> <tr> <th colspan="2">Statement of Account Summary</th> </tr> </thead> <tbody> <tr> <td>Previous Balance</td> <td>\$12,347.22</td> </tr> <tr> <td>Payments and Credits Applied</td> <td>(\$13,904.42)</td> </tr> <tr> <td>Payment Adjustments</td> <td>\$0.00</td> </tr> <tr> <td>Total Current Invoice Activity</td> <td>\$17.49</td> </tr> <tr> <td>BALANCE</td> <td>(\$1,539.71)</td> </tr> <tr> <th colspan="2">Current Invoice Activity</th> </tr> <tr> <td>Chassis Rental Charges</td> <td>\$16.50</td> </tr> <tr> <td>Other Charges</td> <td>\$0.00</td> </tr> <tr> <td>Taxes</td> <td>\$0.99</td> </tr> <tr> <td>Total Current Charges Due:</td> <td>\$17.49</td> </tr> <tr> <td colspan="2">Payment due no later than 09/12/15</td> </tr> </tbody> </table> | Statement of Account Summary | | Previous Balance | \$12,347.22 | Payments and Credits Applied | (\$13,904.42) | Payment Adjustments | \$0.00 | Total Current Invoice Activity | \$17.49 | BALANCE | (\$1,539.71) | Current Invoice Activity | | Chassis Rental Charges | \$16.50 | Other Charges | \$0.00 | Taxes | \$0.99 | Total Current Charges Due: | \$17.49 | Payment due no later than 09/12/15 | |
| Statement of Account Summary | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Previous Balance | \$12,347.22 | | | | | | | | | | | | | | | | | | | | | | | | | |
| Payments and Credits Applied | (\$13,904.42) | | | | | | | | | | | | | | | | | | | | | | | | | |
| Payment Adjustments | \$0.00 | | | | | | | | | | | | | | | | | | | | | | | | | |
| Total Current Invoice Activity | \$17.49 | | | | | | | | | | | | | | | | | | | | | | | | | |
| BALANCE | (\$1,539.71) | | | | | | | | | | | | | | | | | | | | | | | | | |
| Current Invoice Activity | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Chassis Rental Charges | \$16.50 | | | | | | | | | | | | | | | | | | | | | | | | | |
| Other Charges | \$0.00 | | | | | | | | | | | | | | | | | | | | | | | | | |
| Taxes | \$0.99 | | | | | | | | | | | | | | | | | | | | | | | | | |
| Total Current Charges Due: | \$17.49 | | | | | | | | | | | | | | | | | | | | | | | | | |
| Payment due no later than 09/12/15 | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <p>Questions about your invoice? email: accountsreceivable@hrpc2.com tel: 1-877-226-6936 For further information please refer to the HRCP Motor Carrier Agreement located in your ChassisManager Account Profile under Terms and Conditions. Credits for approved disputes will be posted to your billing account and applied on the next invoice. Late payment fees will be applied 5 days after invoice payment is due at a rate of 2% per annum.</p> | | | | | | | | | | | | | | | | | | | | | | | | | | |

The top-right corner of your invoice displays the invoice and account references:

- **Invoice Number:** The reference number of this invoice
- **Invoice Date:** The date this invoice was issued
- **Account Number:** Your account number
- **Chassis Rental Period:** This will be a 15 day range. All usage in that time is billed on this invoice.


In the invoice header your account and invoice details are summarized.

- **Previous Balance:** the BALANCE from your last invoice
- **Payments Posted:** Any payments made during the service period
- **Total Current Invoice Activity:** The total of the current invoice activity
- **BALANCE:** Is the above three amounts combined

The Current Invoice Activity breaks into three sections

- **Chassis Rental Charges:** The total charges for usage in the service period
- **Other Charges & Credits:** The sum of all debits and credits on this invoice
- **Taxes:** The total tax amount for this invoice's chassis rental charges

Remittance Slip

| | | |
|---|--|--|
| Oaktown Trucking Invoice Dept. 1200 Broadway address21 Oakland, WA 94607 UNITED STATES | | Account Number: HRCP-1096 Total Current Charges Due: \$17.49 Amount Paid: <input type="text"/> |
|  | | Invoice Number: 46384HRCP Invoice Date: 08/13/15 |
| Remit with this stub to: | | HRCP Training2 7737 Hampton Rd. Bldg 19, Ste. 100 Norfolk, VA 23505 UNITED STATES |

This is the remittance slip. If you are paying by check, please send this section below the dotted line along with your payment to the lessor. Write the amount you are paying in the **Amount Paid** section. The **Amount Due** here is your BALANCE from the Account Summary.

Rental Charge Summary and Taxes

| Rental Charge Summary (Detail on CSV) | |
|---------------------------------------|-------------|
| Service Period | Usage Total |
| 08/10/15 - 08/13/15 | \$16.50 |

| Taxes | |
|---------------|--------|
| Category | Amount |
| USNNSAPMA_TAX | \$0.99 |
| Total Taxes : | \$0.99 |

The **Rental Charge Summary** displays the total usage charged for the service period or bill cycle. The detailed backup is provided on a CSV file which is explained below.

Rental Tax is itemized by the start/stop location where the rental originated. Trip pickup location and rental origination point may be different locations.

Payment Posted

| Payment Posted | | | |
|------------------------|----------------|-----------------|---------------|
| Date Posted | Payment Method | Invoice Cleared | Amount |
| 08/10/15 | Check | 14437HRCP | (\$13,904.42) |
| Total Payment Posted : | | | (\$13,904.42) |

Payments posted during the bill cycle are recorded here along with the invoice to which the payment was applied.

- **Date Posted:** The date you made the payment
- **Payment Method:** Check, credit card, or ACH
- **Invoice Cleared:** The invoice(s) to which the payment was applied
- **Amount:** The payment amount applied to the listed invoice

Other Charges & Credits

| Other Charges & Credits | | | | |
|---------------------------------|--------------------|-----------------------|-----------------|-----------|
| Date Posted | Reason Code | Description | Invoice Cleared | Amount |
| 04/01/13 | Rental Tax Credit | Rental Tax Credit for | 23131-HRCP | (\$0.60) |
| 04/01/13 | Incorrect Days Out | Rental Credit for | 23131-HRCP | (\$10.00) |
| Total Other Charges & Credits : | | | | (\$10.60) |

The **Other Charges & Credits** section details any credit or debit adjustments posted during the bill cycle.

- **Reason Code:** Tells you whether the adjustment is a credit or debit, and whether it is for tax or chassis rental
- **Description:** This may refer to a rental number
- **Invoice Cleared:** The invoice the credit or debit was applied to
- **Amount:** The amount of that adjustment - numbers in parentheses are negative, for credits
- The total amount matches the Other Charges & Credits section in the invoice summary.

CSV Detail File

| A | B | C | D | E | F | G | H | I | J | K | L | M |
|---------------|------------------|----------------|-------------|-------------|-----------------|-----------------|----------|---------------|----------------|---------------|---------|-------------|
| Rental Number | Container Number | Chassis Number | Pickup Date | Return Date | Trip Pickup Loc | Trip Return Loc | Tax Rate | Shipping Line | BN/BOL | Billable Days | Rate | Trip Charge |
| XXQI625383 | OOLU000005- | OOLZ000005 | 4/10/2015 | 5/10/2015 | USORFVITA | ----- | 6.00% | OOLU | OOLU000005---- | 1 | \$13.15 | \$13.15 |
| XXQI625383 | OOLU000005- | OOLZ000005 | 4/10/2015 | 5/10/2015 | USORFVITA | ----- | 6.00% | OOLU | OOLU000005---- | 1 | \$13.15 | \$13.15 |
| XXQI625383 | OOLU000005- | OOLZ000005 | 4/10/2015 | 5/10/2015 | USORFVITA | ----- | 6.00% | OOLU | OOLU000005---- | 1 | \$13.15 | \$13.15 |
| XXQI625383 | OOLU000005- | OOLZ000005 | 4/10/2015 | 5/10/2015 | USORFVITA | ----- | 6.00% | OOLU | OOLU000005---- | 1 | \$13.15 | \$13.15 |
| XXQI625383 | OOLU000005- | OOLZ000005 | 4/10/2015 | 5/10/2015 | USORFVITA | ----- | 6.00% | OOLU | OOLU000005---- | 1 | \$13.15 | \$13.15 |
| XXQI625383 | OOLU000005- | OOLZ000005 | 4/10/2015 | 5/10/2015 | USORFVITA | ----- | 6.00% | OOLU | OOLU000005---- | 1 | \$13.15 | \$13.15 |
| XXQI625383 | OOLU000005- | OOLZ000005 | 4/10/2015 | 5/10/2015 | USORFVITA | ----- | 6.00% | OOLU | OOLU000005---- | 1 | \$13.15 | \$13.15 |
| XXQI625383 | OOLU000005- | OOLZ000005 | 4/10/2015 | 5/10/2015 | USORFVITA | ----- | 6.00% | OOLU | OOLU000005---- | 1 | \$13.15 | \$13.15 |
| XXQI625383 | OOLU000005- | OOLZ000005 | 4/10/2015 | 5/10/2015 | USORFVITA | ----- | 6.00% | OOLU | OOLU000005---- | 1 | \$13.15 | \$13.15 |
| XXQI625383 | OOLU000005- | OOLZ000005 | 4/10/2015 | 5/10/2015 | USORFVITA | ----- | 6.00% | OOLU | OOLU000005---- | 1 | \$13.15 | \$13.15 |
| XXQI625383 | OOLU000005- | OOLZ000005 | 4/10/2015 | 5/10/2015 | USORFVITA | ----- | 6.00% | OOLU | OOLU000005---- | 1 | \$13.15 | \$13.15 |
| XXQI625383 | OOLU000005- | OOLZ000005 | 4/10/2015 | 5/10/2015 | USORFVITA | ----- | 6.00% | OOLU | OOLU000005---- | 1 | \$13.15 | \$13.15 |
| XXQI625383 | OOLU000005- | OOLZ000005 | 4/10/2015 | 5/10/2015 | USORFVITA | ----- | 6.00% | OOLU | OOLU000005---- | 1 | \$13.15 | \$13.15 |
| XXQI625383 | OOLU000005- | OOLZ000005 | 4/10/2015 | 5/10/2015 | USORFVITA | ----- | 6.00% | OOLU | OOLU000005---- | 1 | \$13.15 | \$13.15 |

In addition to the summary PDF, you will also receive a comma-separated text file (.csv) detailing the charges billed during the cycle. This file may be imported into a spreadsheet for further analysis.

- **Rental Number:** This is the reference number of the entire rental for a single HRCP chassis. A rental may have one or many trips associated with it, depending on how long you continued to use the asset.
- **Container Number:** The container number associated with a particular billable trip within a rental. There may be several containers per rental.
- **Chassis Number:** The chassis you used for the rental. There is only one chassis per rental. When you return the chassis, the rental ends.
- **Pickup and Return Dates:** The days the container was picked up and returned. The return date on the last trip is the date you returned the chassis.
- **Pickup and Return Locations:** The start/stop locations where you picked up and dropped off the container. [Here is a link to the code reference table.](#)
- **Shipping Line:** The SCAC of the shipping line for whom you made the move.
- **BN/BOL:** The booking number or bill of lading associated with a given trip and container.
- **Billable Days:** Each billable day is given a single line item entry, so the value will be 1 for each line.
- **Rate:** The rate you are charged for each billed day. HRCP's current rate is \$10 per day.
- **Trip Charge:** Billable Days x Rate.

Finding Statements on ChassisManager

The Billing menu contains everything you need to find and work with your billing account information. The user interface combines invoices, payments and adjustments under a single screen so everything is one place where you would expect to find it.

IAS CHASSIS

Welcome | Account Summary | Admin | Events | Rental | **Billing** | Street Tires | Help

Account Summary

Required fields marked with (*).

Billing Information

Billing Account Number: HRCF-1096
 Company Name: Oakdown Trucking
 Tax ID:
 Billing Address: 1200 Broadway
 address21 Oakland WA USA

Current Balance: 823.05
 Pending Charges: 0.00
 Auto Payment Authorized: N
 Primary Email Address: mctest@ellerasset.com

Invoices | Payments | Adjustments

Invoices > Manage

View: All

Make a Payment

| Invoice# | Invoice Date | Due Date | Invoice Amount | Rental Tax | Amount To Pay | Status | Download |
|-----------|---------------|---------------|----------------|------------|---------------|--------|---------------|
| 49734HRCF | 12/10/2015 00 | 01/09/2016 02 | \$159.00 | \$0.00 | \$159.00 | OPEN | 49734HRCF.pdf |

Under the Billing Menu you can:

- Quickly find your current balance.
- Lookup and review your invoices.
- Review account activity, past and present.
- Manage your credit/debit card and/or bank draft details
- Make payments online.

To locate your account summary, select **BILLING | ACCOUNT SUMMARY**.

Locating Invoices

The “Invoices” sub-tab on the Account Summary gives you ready access to the last 90 days of invoices on your account. To get a copy of an old invoice, sign in to your account summary and select the PDF you wish to download from the grid.

To locate invoices older than 90 days, select **BILLING | SEARCH INVOICES**.

Here you’ll be able to select for a specific invoice number, date or date range, or invoice status.

Invoices remain in “Open” status until all usage has been paid or credits have been applied.

Making Payments

To make payment on an invoice using credit/debit card or bank draft, select an open invoice from your Invoices list and press the “Make Payment” button.

IAS CHASSIS Log Out | marcus.receiver@gmail.com

Admin | Events | Rental | Billing | Street Turn | Help

Welcome | Account Summary | Invoices Search (2)

Account Summary

Required fields marked with (*).

Billing Information

| | |
|------------------------------------|---|
| Billing Account Number : HRCP-1096 | Current Balance : 823.05 |
| Company Name : Oaktown Trucking | Pending Charges : 0.00 |
| Tax ID : | Auto Payment Authorized : N |
| Billing Address : 1200 Broadway | Primary Email Address : mctest@interasset.com |
| address21 Oakland WA USA | |

Invoices | Payments | Adjustments

Invoices > Manage

View: All

Make a Payment

| Invoice# | Invoice Date | Due Date | Invoice Amount | Rental Tax | Amount To Pay | Status | Download |
|-----------|---------------|---------------|----------------|------------|---------------|--------|---------------|
| 49734HRCP | 12/10/2015 00 | 01/09/2016 02 | \$159.00 | \$0.00 | \$159.00 | OPEN | 49734HRCP.pdf |

Make Payments

☒ **Recurring Payment Method**

Invoice Number : 49734HRCP

Amount* : 159

Paid By* : Credit Card

First : Jim

Middle :

Last : Grey

Suffix :

Card Type : VISA

Number : Last 4: 1111

Expiration : 12/2014

Description :

Save Cancel

You will be presented with a form to verify the invoice details, payment amount and the payment instrument being used.

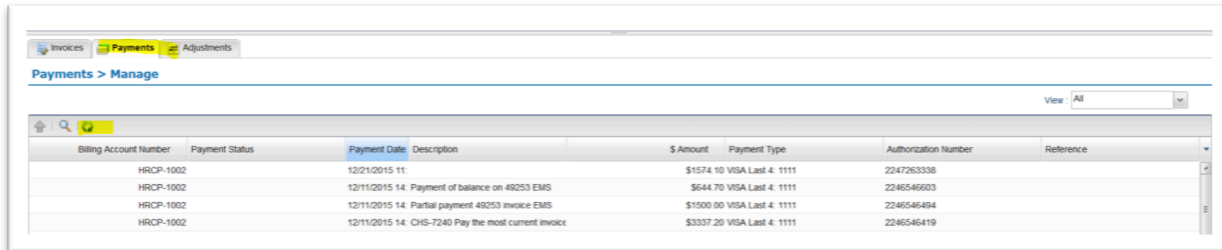
You have the option to:

1. Partial pay by adjusting the amount
2. Add notes or comments in the description field

When you commit the payment, refreshing the Invoices sub-tab will show you the updated status and “Amount to Pay” balance on the invoice.

Viewing Payments

To verify the payment, tab to the “Payments” sub-tab in the Account Summary and refresh the grid.



| Billing Account Number | Payment Status | Payment Date | Description | \$ Amount | Payment Type | Authorization Number | Reference |
|------------------------|----------------|----------------|---------------------------------------|-----------|-------------------|----------------------|-----------|
| HRCP-1002 | | 12/21/2015 11: | | \$1574.10 | VISA Last 4: 1111 | 2247263338 | |
| HRCP-1002 | | 12/11/2015 14: | Payment of balance on 49253 EMS | \$644.70 | VISA Last 4: 1111 | 2246546603 | |
| HRCP-1002 | | 12/11/2015 14: | Partial payment 49253 invoice EMS | \$1500.00 | VISA Last 4: 1111 | 2246546494 | |
| HRCP-1002 | | 12/11/2015 14: | CHS-7240 Pay the most current invoice | \$3337.20 | VISA Last 4: 1111 | 2246546419 | |

The Payments sub-tab displays the last 90 days of payments, most recent on top. When you use an on-line payment method, you can view your payments immediately after you make them. If you pay by check, payments will become visible when posted by the lessor’s A/R clerks.

To locate information on an older payment, select **BILLING | SEARCH PAYMENTS** from the menu. Here you can search by a date or date range to locate additional payment activity.

Setting Up a Payment Instrument

Credit/Debit Card

At the billing menu, select **BILLING | ADD CREDIT CARD**. You’ll be presented with a form to complete the credit/debit card information. Please check with your lessor to verify which cards they accept.

The screenshot shows the IAS CHASSIS web application interface. The top navigation bar includes links for Admin, Events, Rental, Billing, Street Turn, and Help. The breadcrumb trail indicates the user is in the Billing Information section, specifically the Credit Card sub-section. The main form area is titled 'Add Billing Information' and contains a 'Credit Card Information' section. This section includes input fields for *First, Middle, *Last, and Suffix. Below these is a *Card Type dropdown menu with a 'Choose One' label. At the bottom of the section are *Number and *Expiration date fields. 'Cancel' and 'Next' buttons are located at the bottom right of the form.

- Enter your name as it appears on your credit card
- Select your credit card type from the available options
- Enter your Credit Card Number
- Enter your credit card's expiration date in the format MM/YYYY (e.g. 02/2016 = February 2016)
- When you are done, click **Next**

Credit card entry is PCI security compliant. Your credit card information is encrypted and secure when passed to the system for authorization. IAS, its affiliates, and lessor partners do not have direct access to your credit information.

You may keep one credit/debit card on file for payments in ChassisManager. The most current entry will be used as the payment method on file.

Bank Draft (ACH or eCheck)

The screenshot shows the IAS CHASSIS web application interface for the 'Bank Draft' section. The breadcrumb trail is 'Billing Information > Bank Draft'. A note states 'Required fields marked with (*)'. The form is titled 'Add Billing Information' and features a 'Select Payment Type' dropdown menu currently set to 'Bank Draft'. Below this, the 'Bank Information' section contains input fields for *Routing Number, *Account Number, *Bank Name, *Account Type, and *EIN. The form is designed for entering bank details for ACH or eCheck payments.

If your lessor accepts payment by ACH or eCheck through the ChassisManager payment gateway, you may use this payment option. Please confirm with your lessor if this method is acceptable.

At the billing menu, select **BILLING | ADD BANK DRAFT**. Complete the form with the required information.

- Enter your bank's 9-digit Routing Number
- Enter your Bank Account Number
- Employer Identification Number (EIN) is an optional entry. Some lessors may require an EIN reference for billing purposes.
- Enter the name of your bank
- Select whether the account type is checking or savings
- When you are done, click **Save**

Disputing Charges Post-Invoice

Should it become necessary to dispute a charge after bill cycle approvals and invoice distribution, please follow these instructions.

| Rental Status | Invoice Number | Rental Start Date | Rental Start Location | Rental End Date | Rental End Location | Rental Number | Container Number | Chassis Number | Motor Carrier Name | Trip Number | Pickup Date | Return Date |
|---------------|----------------|-------------------|--------------------------------|------------------|--------------------------------|---------------|------------------|----------------|--------------------|-------------|------------------|------------------|
| Closed | 49732HRCP | 12/05/2015 08:00 | Norfolk International Terminal | 12/09/2015 08:00 | Norfolk International Terminal | XXQ1552812 | HLCU000001 | APLZ153588 | Oaktown Trucking | 1 | 12/05/2015 08:00 | 12/06/2015 07:59 |
| Closed | 49732HRCP | 12/05/2015 08:00 | Norfolk International Terminal | 12/09/2015 08:00 | Norfolk International Terminal | XXQ1552812 | HLCU000001 | APLZ153588 | Oaktown Trucking | 2 | 12/06/2015 08:00 | 12/09/2015 08:00 |
| Closed | 49732HRCP | 12/05/2015 08:00 | Norfolk International Terminal | 12/09/2015 08:00 | Norfolk International Terminal | XXQ1552813 | HLCU000002 | APLZ154534 | Oaktown Trucking | 1 | 12/05/2015 08:00 | 12/06/2015 07:59 |
| Closed | 49732HRCP | 12/05/2015 08:00 | Norfolk International Terminal | 12/09/2015 08:00 | Norfolk International Terminal | XXQ1552813 | HLCU000002 | APLZ154534 | Oaktown Trucking | 2 | 12/06/2015 08:00 | 12/09/2015 08:00 |
| Closed | 49734HRCP | 12/05/2015 08:00 | Norfolk International Terminal | 12/09/2015 08:00 | Norfolk International Terminal | XXQ1552814 | HLCU000005 | APLZ158956 | Oaktown Trucking | 1 | 12/05/2015 08:00 | 12/06/2015 07:59 |
| Closed | 49734HRCP | 12/05/2015 08:00 | Norfolk International Terminal | 12/09/2015 08:00 | Norfolk International Terminal | XXQ1552814 | HLCU000005 | APLZ158956 | Oaktown Trucking | 2 | 12/06/2015 08:00 | 12/09/2015 08:00 |
| Closed | 49734HRCP | 12/05/2015 08:00 | Norfolk International Terminal | 12/09/2015 08:00 | Norfolk International Terminal | XXQ1552815 | HLCU000004 | APLZ156042 | Oaktown Trucking | 1 | 12/05/2015 08:00 | 12/06/2015 07:59 |
| Closed | 49734HRCP | 12/05/2015 08:00 | Norfolk International Terminal | 12/09/2015 08:00 | Norfolk International Terminal | XXQ1552815 | HLCU000004 | APLZ156042 | Oaktown Trucking | 2 | 12/06/2015 08:00 | 12/09/2015 08:00 |
| Closed | 49732HRCP | 12/05/2015 08:00 | Norfolk International Terminal | 12/09/2015 08:00 | Norfolk International Terminal | XXQ1552816 | HLCU000003 | APLZ155842 | Oaktown Trucking | 1 | 12/05/2015 08:00 | 12/06/2015 07:59 |
| Closed | 49732HRCP | 12/05/2015 08:00 | Norfolk International Terminal | 12/09/2015 08:00 | Norfolk International Terminal | XXQ1552816 | HLCU000003 | APLZ155842 | Oaktown Trucking | 2 | 12/06/2015 08:00 | 12/09/2015 08:00 |

- Sign In to ChassisManager select **RENTALS | SEARCH TRIPS**
- Search by the invoice number in dispute
- Output the results and open in a spreadsheet
- In your Excel document, add two columns:
 - Dispute Reason
 - Amount Disputing
- Provide a dispute reason and amount for each row under dispute. All disputes on the invoice should be sent together even if the reasons are different.
- Save the file using the Invoice number in the file name as reference (e.g. 49763HRCP_20151221.xlsx).
- Email the document and attach any supporting documentation that will assist a speedy resolution to chassis@interasset.com

A support ticket will then be created where you can track the progress of your dispute. Inbound support inquiries are generally acknowledged and responded to within one business day.

If your dispute is resolved and results in a credit adjustment to your account, you will be able to view that transaction on your Account Summary in ChassisManager on the “Adjustments” sub-tab of the Account Summary.

The screenshot shows the IAS CHASSIS web interface. The top navigation bar includes links for Admin, Events, Rental, Billing, Street Turn, and Help. The main content area is titled "Account Summary" and includes a sub-tab for "Adjustments". Below the "Adjustments" sub-tab, there is a table of adjustments.

Billing Information:

- Billing Account Number: HRCP-1096
- Company Name: Oakland Trucking
- Tax ID:
- Billing Address: 1200 Broadway, address21 Oakland WA USA
- Current Balance: \$23.05
- Pending Charges: 0.00
- Auto Payment Authorized: N
- Primary Email Address: mctest@enterasset.com

Adjustments > Manage

| Amount | Credit | Type | Reason | Description | Invoice | Status | Date |
|----------|--------|--------|--|------------------------------------|-----------|--------|---------------|
| \$2.01 | | MANUAL | Rental Tax Debit USORFPCZA - Porteur 4 trips day tax | | 2854THRCP | POSTED | 03/23/2014 00 |
| \$33.45 | | MANUAL | Debit when number of trips exceeds 4 ; 4 trips day test | | 2854THRCP | POSTED | 03/23/2014 00 |
| \$74.74 | Yes | MANUAL | Rental Tax Credit USORFHRWA - HREI Rental Tax Credit Test Invoice Template | | | POSTED | 10/16/2013 15 |
| \$250.00 | Yes | MANUAL | Incorrect Exception | Usage Credit Test Invoice Template | | POSTED | 10/16/2013 15 |
| \$12.65 | Yes | MANUAL | Rental Tax Credit USORFVITA - Nortolk Tax Credit Test Invoice Template | | | POSTED | 10/16/2013 15 |
| \$110.00 | Yes | MANUAL | Other | Usage Credit Test Invoice Template | | POSTED | 10/16/2013 15 |

To search for a credit by date or specific criteria, you may alternately use the [BILLING | SEARCH ADJUSTMENTS](#) menu.

Please note that lessors may have specific rules and restrictions concerning post-Invoice disputes. In general, lessors allow for 30 days' post bill cycle approval to accept a dispute. Should your request fall outside the lessor guidelines, you will be notified when your dispute ticket is reviewed.

Getting Help

Whether it's general assistance or technical support, IAS offers a variety of ways to help you with your ChassisManager needs. IAS uses a global system to track all issues and we are committed to addressing all service requests within 24 hours.

Online Support

Visit our support portal at <http://iassupport.interasset.com/home>. In the ChassisManager section you will find a library of articles and answers to Frequently Asked Questions.

If you cannot find an answer in the support forums, or if you have another technical issue requiring assistance, you can open a support ticket directly from the portal.

Whether you submit a support inquiry from the portal or via the chassis@interasset.com email, your request will be documented in a support ticket that can be tracked and monitored from this resource.

Training

IAS Support offers regularly scheduled, webinar-based training for new users and for current users who simply desire a refresh. Please check the support portal for a time that works with your schedule.

In many cases, IAS Support and the Pool Operator lessee for selected nominated accounts will facilitate new user training and orientation. Your account administrator will be contacted directly in these situations.

Please contact IAS Support for information about advanced, pay-per-incident training if specialized or on site knowledge transfer is desired.

Call or Email Us

IAS Support resources are available 24 hours per day.

| | |
|-------|--|
| Email | chassis@interasset.com |
| Phone | +1.510.844.3000 option #5 |

Glossary of Terms

| Item | Description |
|-----------------------|--|
| Account Administrator | Any user granted Administrator permissions for an account. By default, the initial user is designated with administrator permissions. This user class is designated to receive all account updates and notifications on behalf of the registered organization. |
| BCO | Beneficial Cargo Owner |
| BCO Code | Code used by ChassisManager to identify the Beneficial Cargo Owner. |
| Billing | When invoice statements are sent to customers on the approved Chassis Pool Operator cycle. |
| Customer On-Boarding | The process of customer registration into the ChassisManager platform and Pool Operator acceptance of the registration. |
| EDI | Electronic data interchange |
| EIR | Equipment interchange receipt (which may be in electronic form) |
| Equipment Provider | General term often used in reference to Chassis Pool Operators or Equipment Lessors. |
| Event | Data representing the physical movement of equipment as reported by designated start/stop facilities. Events tracked are gates (gate out, gate in) and mounts (tie, untie) |
| Pick Up Date | Chassis activity indicating an out-gate date on a trip within a rental |
| Rating | Rating occurs when an open rental ends and enters into pre-invoice status, charges and bill to party then appear in the ChassisManager system. |
| Rental End Date | The date the chassis was returned and no longer billing at the daily rate, coincident with the return date of the last trip of the rental. |
| Rental Start Date | The date the chassis is initially released to the MOTOR CARRIER from a valid start location. |
| Return Date | Chassis activity indicating an in-gate date on a trip within a rental |
| SaaS | Software-as-a-Service |
| SCAC | Standard Carrier Alpha Code |