



ChassisManager BCO Welcome Pack



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Table of Contents

Welcome to IAS ChassisManager	3
What is ChassisManager?	4
Customer On-Boarding, User Registration and Administration	4
Event Management	4
Rating, Billing and Collections	5
How does ChassisManager work?	6
Background	6
Gate Movement Event Reporting	6
Responsible Third Party Lessee Reporting	7
Beneficial Cargo Owner Direct Billing	9
BCO Role and Responsibilities	9
BCO Nomination	9
BCO Setup – Account and User Registration	11
Registration Instructions	12
Submitting BCO Data	18
File Format	18
Pool Operator ID's for Participating Lessors	19
Sample BCO Data File	19
Data Upload Process	20
Matching BCO Data to Movement	22
Open Rentals	24
Pre-Invoice Rentals	25
Reviewing Rentals in Pre-Invoice Status	26
Billing, Payments and Collection	31
Designating the Invoice Recipient	31
How to Read your Statement	31
Locating Invoices	36
Making Payments	37
Viewing Payments	38
Disputing Charges Post-Invoice	40
Getting Help	42
Online Support	42
Training	42
Call or Email Us	42
Glossary of Terms	43

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

AS CHASSIS

Contact Us | Latest News

Email:

Password:

Log In

Register

Forgot Password

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Registration Instructions

Step 1 – Establish a User Name

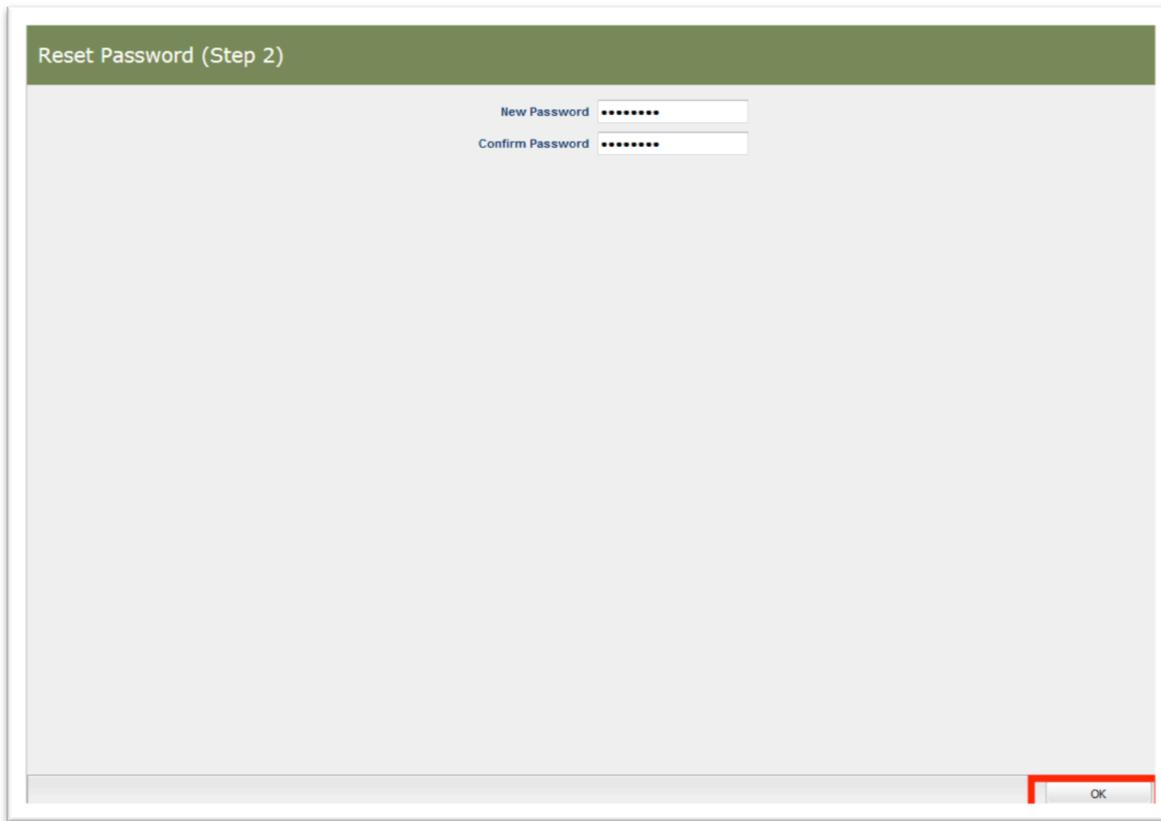
The screenshot shows the 'User Registration (Step 1)' page for IAS CHASSIS. The page has a dark blue header with the IAS CHASSIS logo. Below the header is a green bar with the text 'User Registration (Step 1)'. The main content area contains several form fields: 'Your email' (with 'name@company.com' entered), 'Confirm email', 'Name' (with 'First' and 'Last' sub-fields), 'Company Name', 'Job Title', and 'Phone'. Below these fields is a CAPTCHA section with the text 'Help us protect your privacy. Enter the letters that appear in the image below to make sure your information remains secure from automated programs.' The CAPTCHA image shows a street scene with a house number '176'. To the right of the image are three small icons: a refresh button, a volume icon, and a help icon. At the bottom right of the form is a 'Register' button.

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

AS CHASSIS

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 IAS CHASSIS. The page has a dark blue header with the IAS CHASSIS logo. Below the header is a green bar with the text 'Company Registration (Step 4)'. A red-bordered box contains a 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:

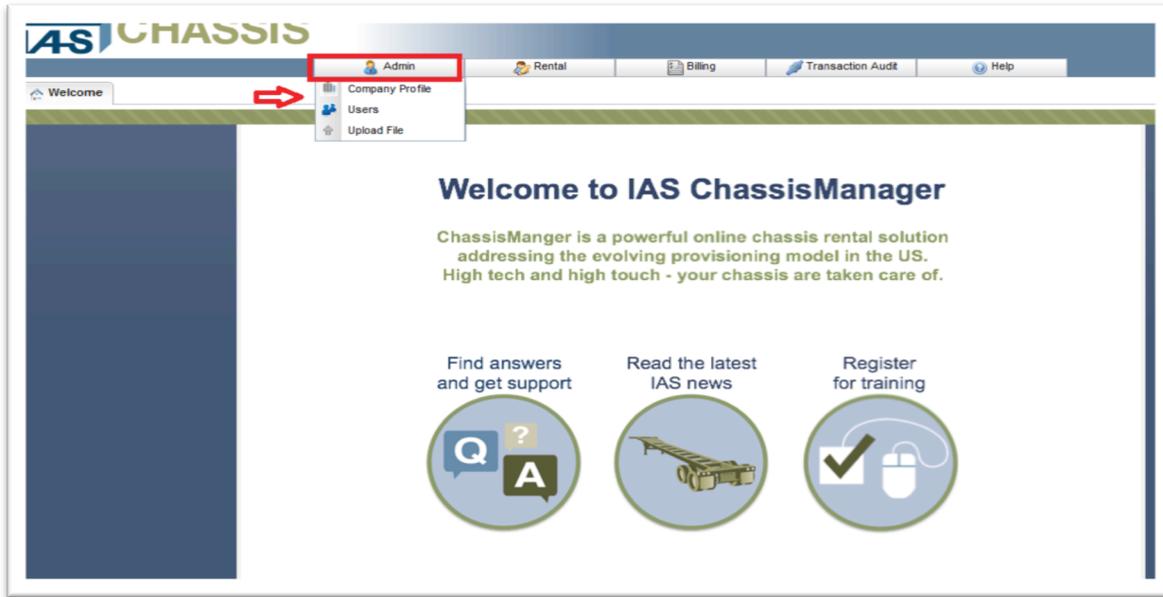
Company Name	Register BCO
Country	United States of America
Address 1	123 Main Street
Address 2	
City	Oakland
State	California
Postal Code	94607
Currency	US Dollar
Phone	510-844-3000
Fax	
URL	

At the bottom right of the form is a button labeled '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.

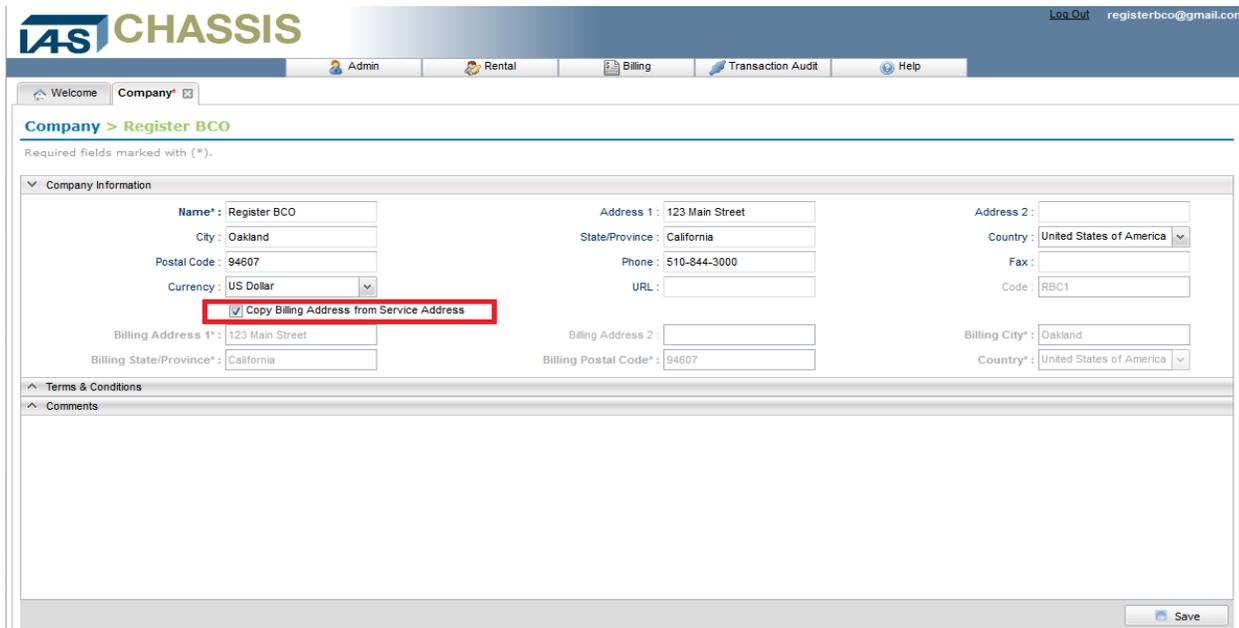
Step 5 – Account Management, Lessor Terms and Conditions



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.



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.

The screenshot shows the IAS CHASSIS web interface. The breadcrumb trail is 'Company > BCO Logistics'. Under the 'Company Information' section, the 'Terms & Conditions' tab is selected. Below this, a table lists equipment providers with columns for 'Equipment Provider', 'View Terms & Conditions', 'Status', 'Accepted By', and 'Accepted Date'. The 'HRCP' row is highlighted with a red box, and its 'View' link is also highlighted. Other providers listed include Oceanic Shipping, VV Equipment Provider 1, Container Navigation Corp, and several NYK Line (NA) Inc. entities (SACP, COCP, GCCP, MCCP). A 'Save' button is visible at the bottom right of the form.

Equipment Provider	View Terms & Conditions	Status	Accepted By	Accepted Date
Oceanic Shipping	View			
HRCP	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			

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.

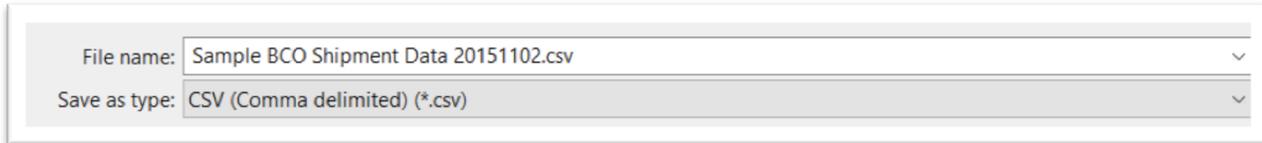
This sample displays the file when in tabular format such as within a spreadsheet (e.g. Microsoft Excel)

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.



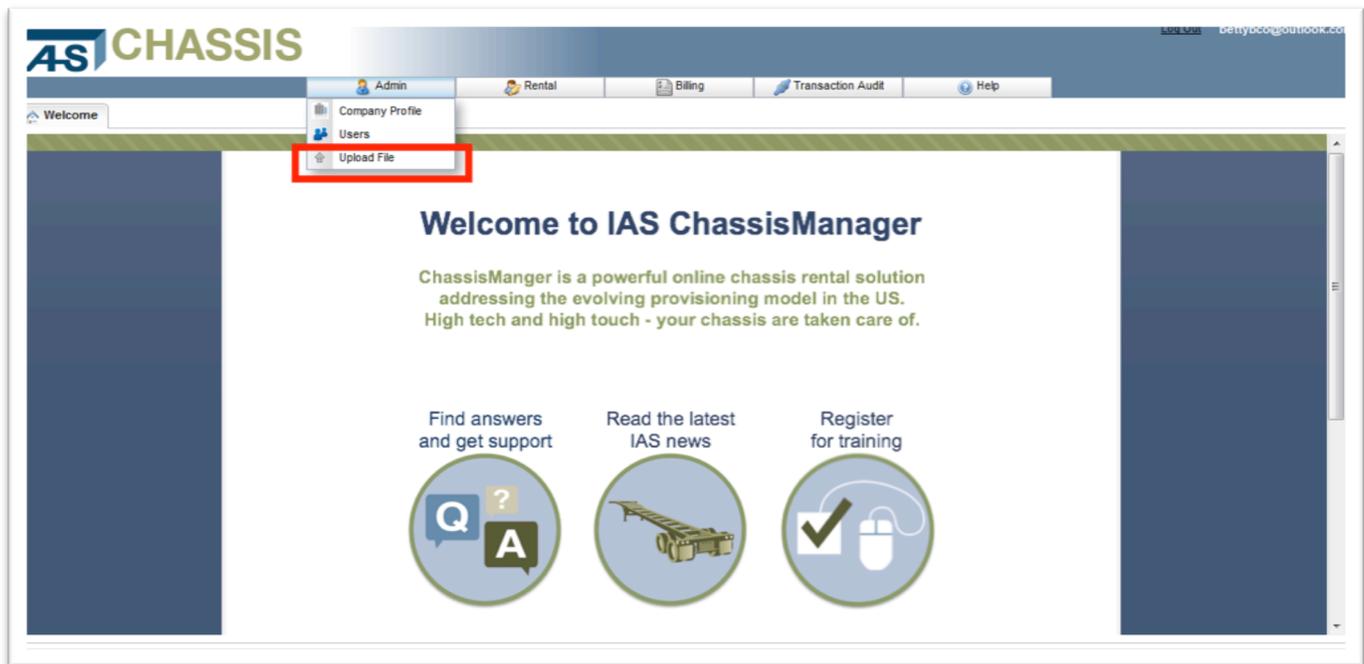
File name: Sample BCO Shipment Data 20151102.csv
Save as type: CSV (Comma delimited) (*.csv)

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



IAS CHASSIS

Admin | Rental | Billing | Transaction Audit | Help

Welcome

Company Profile
Users
Upload File

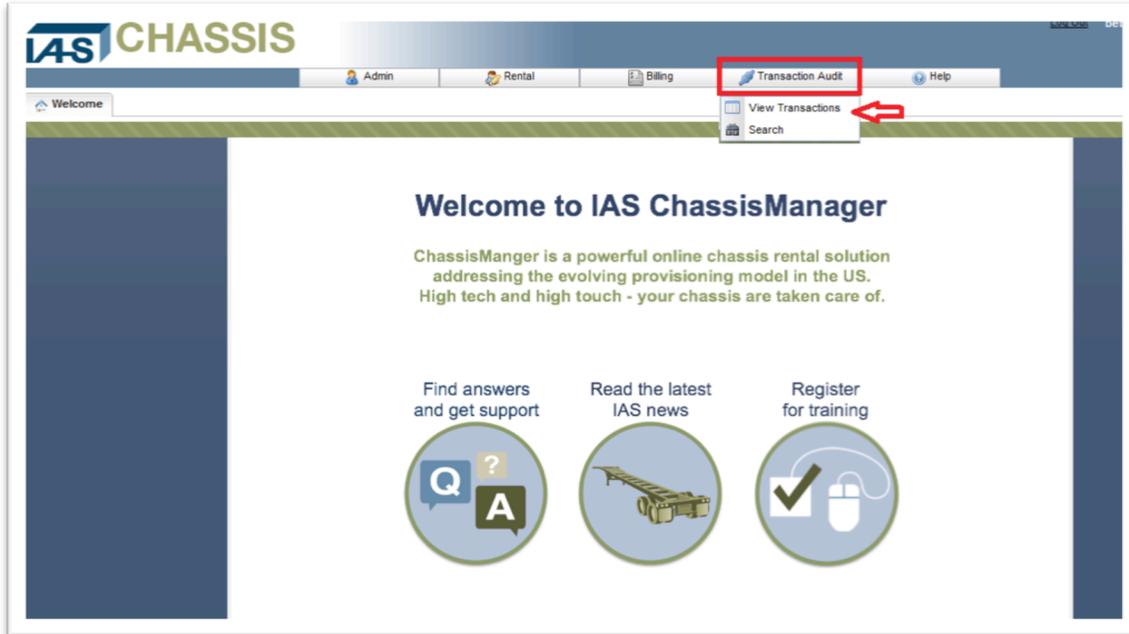
Welcome to IAS ChassisManager

ChassisManger is a powerful online chassis rental solution addressing the evolving provisioning model in the US. High tech and high touch - your chassis are taken care of.

Find answers and get support | Read the latest IAS news | Register for training

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 IAS CHASSIS Transaction Audit page. The table displays the history of file uploads. The 'Status' column is highlighted with a red box.

Document Type	Activity	Sender	Source	File Name	Sender Transaction Number	Unit Number	Message Sent	Message Received	Status	Current State	Transaction ID	Next State	Tra
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 is a search bar and a 'View: All' dropdown. Below is a data grid with the following 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 grid contains three rows of BCOData and one row of RCNData. The first two rows have a status of 'Failure', while the third and fourth rows have a status of 'Valk'.

Document Type	Activity	Sender	Source	File Name	Sender Transaction Number	Unit Number	Message Sent	Message Received	Status	Cur
BCOData	CREATE	B50	EDI	Boschtst2.csv_BOSC	BOSCH5524	TEMU3943750	12/11/2015 06:42	12/11/2015 06:42	Failure	Valk
BCOData	CREATE	B50	EDI	Boschtst2.csv_BOSC	BOSCH5525	BSU9252989	12/11/2015 06:42	12/11/2015 06:42	Failure	Valk
BCOData	CREATE	B50	EDI	Boschtst2.csv_BOSC	BOSCH5523	DFSU6608882	12/11/2015 06:42	12/11/2015 06:42	Failure	Valk
RCNData	CRFATF	KI NP	FM	KIxxxxRCN2.csv KI N1	2179495160	TCMI7299511	12/11/2015 06:21	12/11/2015 06:21	Failure	Valk

Below the grid is an 'Errors' window with the following content:

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	PI
Open		12/12/2015 10:30	Portsmouth Container Yard			XXQ1659914	OOLU9310977	HRGZ427716	Bridge Terminal Transport	1	12/12/2015 10:30		Pc
Open		12/12/2015 09:44	Virginia International Gateway			XXQ1659873	MOTU1415351	FLXZ407524	Bridge Terminal Transport	2	12/12/2015 09:57		Pc
Open		12/11/2015 14:24	Portsmouth Marine Terminal			XXQ1659029	OOLU8172322	EMCZ741237	Bridge Terminal Transport	2	12/11/2015 14:39		Pc
Open		12/11/2015 13:19	Virginia International Gateway			XXQ1658867	MSKU6398005	DCSZ273747	Bridge Terminal Transport	1	12/11/2015 13:19		Vh
Open		12/11/2015 13:04	Portsmouth Container Yard			XXQ1658819	CMAU4879382	FLXZ426650	Bridge Terminal Transport	1	12/11/2015 13:04		Pc
Open		12/11/2015 12:28	Virginia International Gateway			XXQ1658713	TCLU5446040	TRLZ148149	Bridge Terminal Transport	1	12/11/2015 12:28		Vh
Open		12/11/2015 12:16	Norfolk International Terminal			XXQ1658686	TCLU8926758	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

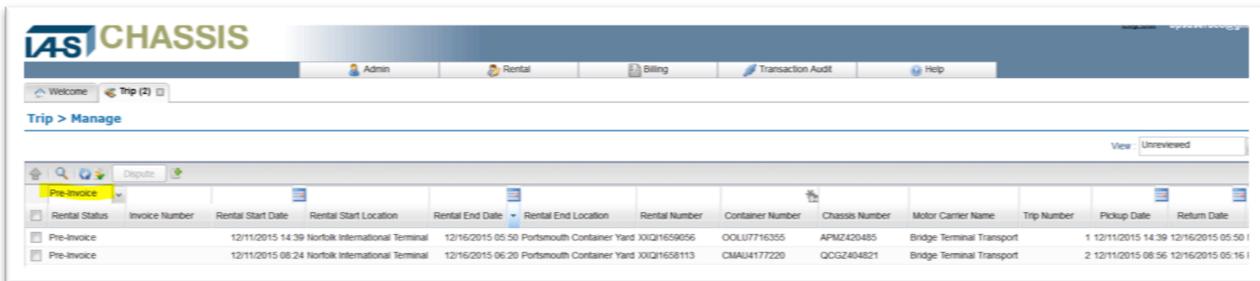
Pre-Invoice Rentals

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.



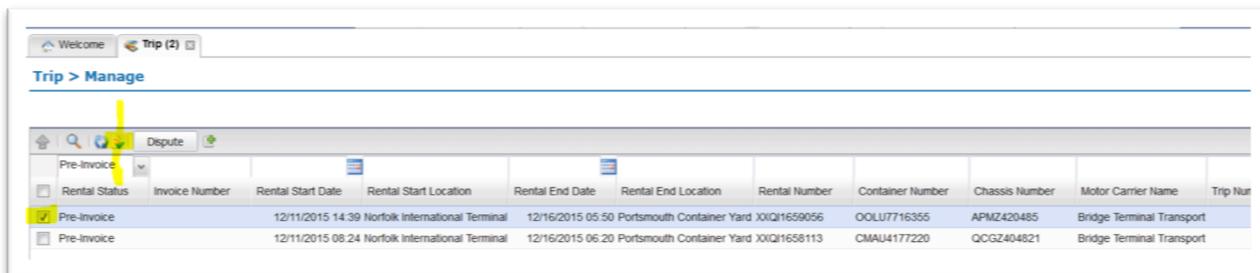
The screenshot shows the CHASSIS Trip Viewer interface. The top navigation bar includes 'Welcome', 'Trip (2)', and 'Admin'. Below the navigation bar, there is a 'Trip > Manage' section with a 'View: Unreviewed' dropdown. A toolbar contains icons for search, dispute, and refresh. The main area displays a table of rental records with columns for 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 a '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	QCZ404821	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.



The screenshot shows the CHASSIS Trip Viewer interface with the same table as above. The first row is highlighted in blue, and a yellow arrow points to the checkbox in the 'Rental Status' column for that row. The 'Review' button in the toolbar is also highlighted with a yellow arrow.

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
<input checked="" type="checkbox"/> 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
<input type="checkbox"/> Pre-Invoice		12/11/2015 08:24	Norfolk International Terminal	12/16/2015 06:20	Portsmouth Container Yard	XXIQ1658113	CMAU4177220	QCZ404821	Bridge Terminal Transport	2	12/11/2015 08:56	12/16/2015 05:16

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 LAS CHASSIS interface. At the top, there's a navigation bar with 'Admin', 'Rental', 'Billing', 'Transaction Audit', and 'Help'. Below that, a breadcrumb trail reads 'Trip > Manage'. A search bar contains 'Dispute'. A table lists several 'Pre-Invoice' trips. The first row is selected, and the 'Dispute' button in the toolbar is highlighted in yellow. Below the table, there's a section for 'Trip Comments' with a table for 'Created Date', 'Created By', 'Comments', 'Attachment', and 'Private'. A message at the bottom states 'No records found for the selected record.'

Pre-Invoice	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	Pickup Location	Return Location
<input type="checkbox"/>		12/11/2015 14:39	Norfolk International Terminal	12/16/2015 05:50	Portsmouth Container Yard	XXQ1658113	OOLU7716355	APM2420485	Bridge Terminal Transport	1	12/11/2015 14:39	12/16/2015 05:50	Norfolk International Terminal	Portsmouth Container Yard
<input checked="" type="checkbox"/>		12/11/2015 08:24	Norfolk International Terminal	12/16/2015 06:20	Portsmouth Container Yard	XXQ1658113	CMAU4177220	QCG2404821	Bridge Terminal Transport	2	12/11/2015 08:56	12/16/2015 05:16	Norfolk International Terminal	Portsmouth Container Yard

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

The screenshot shows the 'Dispute' form. It is divided into two main sections: 'Trip Details' and 'Dispute Details'. The 'Trip Details' section contains various input fields for trip information. The 'Dispute Details' section includes a dropdown for 'Dispute Category', a dropdown for 'Dispute Status', a text area for 'Comments', and a 'Supporting Document' field with a 'Browse...' button.

Trip Details		
Trip Number	2	Revision Number
Pickup Location	Portsmouth Container Yard	Return Date
Container Number	CMAU4177220	Bill of Lading
Service Contract Number	CQNAM045906	Haulage Type
Shipping Name	Cma-Cgm	Shipping SCAC
BCO Code	BPS1	Trip Duration
Base Rate		Invoice Number
Billed Party SCAC	BPS1	Billed Party Account Number
Original Service Contract Number		Original Shipping SCAC
Pickup Date	12/11/2015	Return Location
		Booking Number
		Consignee Name
		BCO Name
		Adjusted Days
		Charges(USD)
		Original Haulage Type

Dispute Details

Dispute Category: Dispute Status:

Comments:

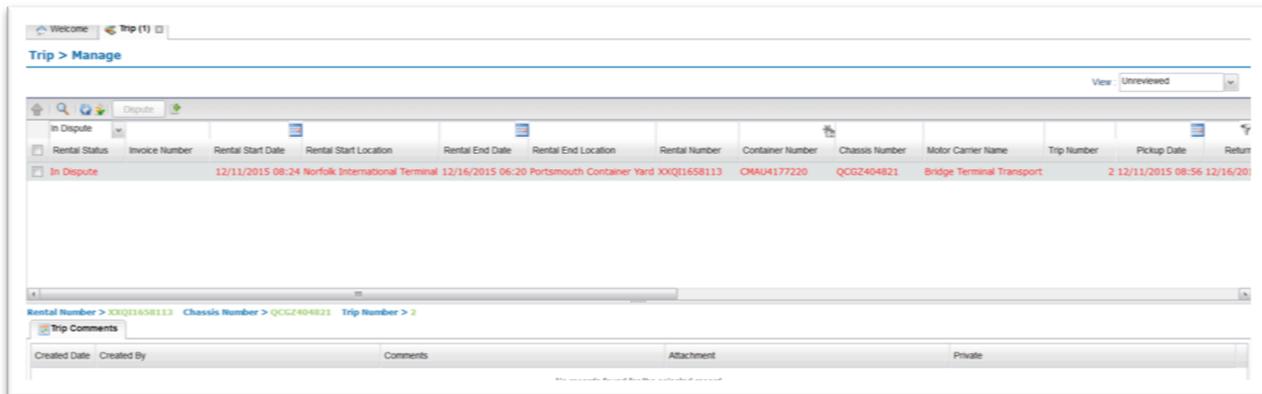
Supporting Document: No file selected.

- **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

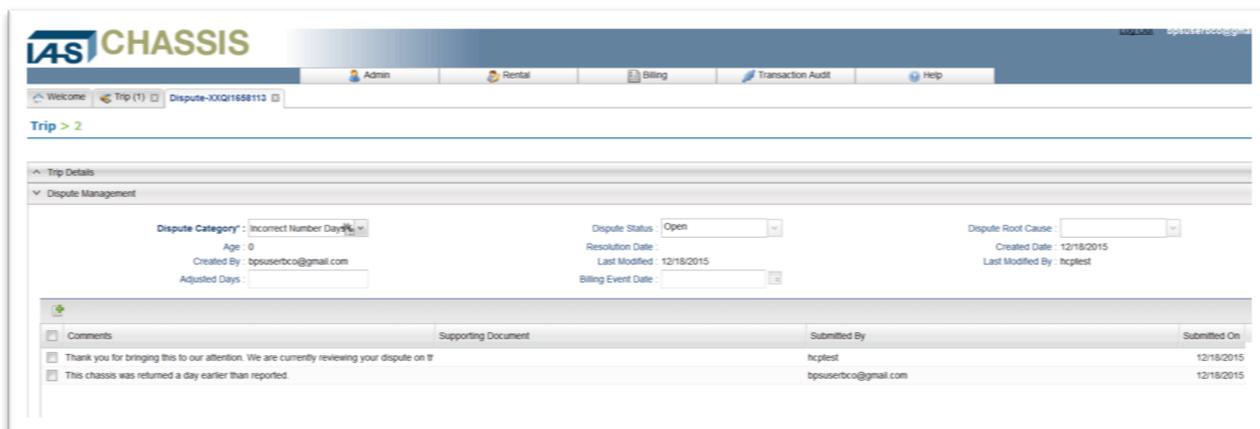
Upon completing the dispute form, the rental will be transitioned to “In Dispute” status. While in this status, the usage on the rental will not be billed. The rental will stay in this status until the dispute is resolved.

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.



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.



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	XXQ1658113	CMAU4177220	QCG2404821	Bridge Terminal Transport	2	12/11/2015 08:56	12/16/2

Double click the trip to review the resolution notes:

Dispute Management

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" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th colspan="2" style="text-align: center;">Statement of Account Summary</th> </tr> </thead> <tbody> <tr> <td>Previous Balance</td> <td style="text-align: right;">\$12,347.22</td> </tr> <tr> <td>Payments and Credits Applied</td> <td style="text-align: right;">(\$13,904.42)</td> </tr> <tr> <td>Payment Adjustments</td> <td style="text-align: right;">\$0.00</td> </tr> <tr> <td>Total Current Invoice Activity</td> <td style="text-align: right;">\$17.49</td> </tr> <tr> <td>BALANCE</td> <td style="text-align: right;">(\$1,539.71)</td> </tr> <tr> <th colspan="2" style="text-align: center;">Current Invoice Activity</th> </tr> <tr> <td>Chassis Rental Charges</td> <td style="text-align: right;">\$16.50</td> </tr> <tr> <td>Other Charges</td> <td style="text-align: right;">\$0.00</td> </tr> <tr> <td>Taxes</td> <td style="text-align: right;">\$0.99</td> </tr> <tr> <td>Total Current Charges Due:</td> <td style="text-align: right;">\$17.49</td> </tr> <tr> <td colspan="2" style="text-align: center; font-size: x-small;">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	
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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@hrcp2.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

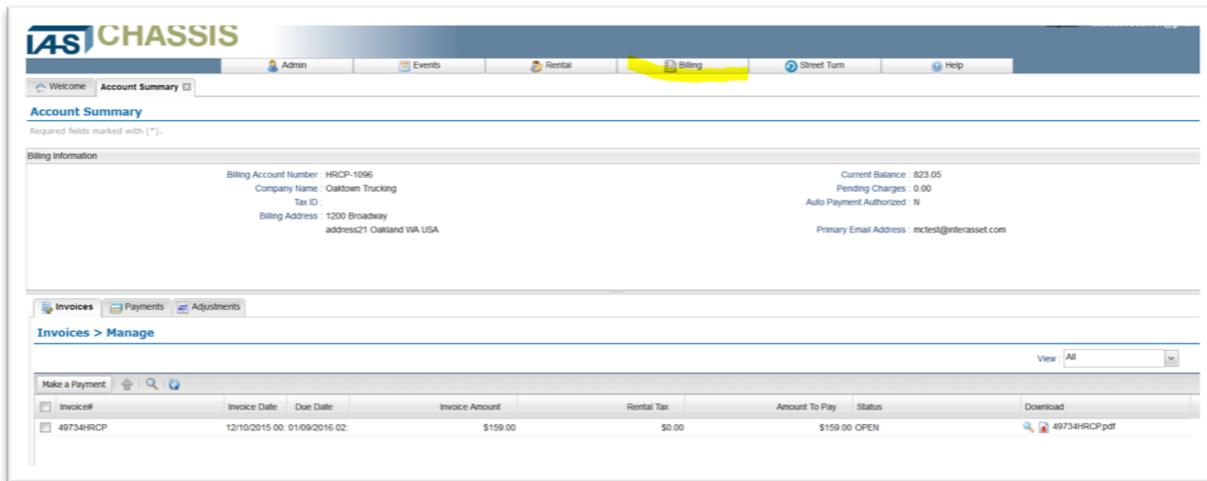
A	B	C	D	E	F	G	H	I	J	K	L	M
Rental Number	Container Number	Chassis Number	Pickup Date	Return Date	Trip Pickup Loc	Trip Return Loc	Tax Rate	Shipping Line	BN/BOL	Billable Days	Rate	Trip Charge
XXQI625383	OOLU000005-	OOLZ000005	4/10/2015	5/10/2015	USORFVITA	-----	6.00%	OOLU	OOLU000005----	1	\$13.15	\$13.15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

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 HRCPC 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 charges for each billed day. HRCPC'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.



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.

The screenshot shows the IAS CHASSIS web application interface. At the top, there is a navigation bar with the IAS CHASSIS logo and a user profile for 'marcus.receiver@gmail.com'. Below the navigation bar, there are tabs for 'Welcome', 'Account Summary', and 'Invoices Search (2)'. The 'Account Summary' section displays billing information for account HRCP-1096, including company name 'Oaktown Trucking', tax ID, and billing address. It also shows financial details like 'Current Balance: 623.05' and 'Pending Charges: 0.00'. Below this, there are tabs for 'Invoices', 'Payments', and 'Adjustments'. The 'Invoices > Manage' section shows a table of invoices. The first row is highlighted, showing an invoice for amount \$159.00 with a 'Make a Payment' button next to it.

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

The 'Make Payments' dialog box is shown, allowing the user to enter payment details. It includes a checkbox for 'Recurring Payment Method' which is checked. The form fields are as follows:

- 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:

At the bottom right of the dialog, there are 'Save' and 'Cancel' buttons.

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 interface. The breadcrumb trail is "Billing Information > Credit Card". The form is titled "Add Billing Information" and contains a section for "Credit Card Information". The fields are as follows:

- * First: [Text Input]
- Middle: [Text Input]
- * Last: [Text Input]
- Suffix: [Text Input]
- * Card Type: [Dropdown Menu with "Choose One" selected]
- * Number: [Text Input]
- * Expiration: [Text Input]

At the bottom right of the form are "Cancel" and "Next" buttons.

- 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 interface. The breadcrumb trail is "Billing Information > Bank Draft". The form is titled "Add Billing Information" and contains a section for "Bank Draft". The fields are as follows:

- Select Payment Type: [Dropdown Menu with "Bank Draft" selected]
- Bank Information:
 - Routing Number*: [Text Input]
 - Account Number*: [Text Input]
- Bank Name*: [Text Input]
- Account Type*: [Dropdown Menu]
- EH: [Text Input]

A note at the top of the form states: "Required fields marked with (*)".

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	XXQ1652812	HLCU000001	APL2153588	Oakton 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	XXQ1652812	HLCU000001	APL2153588	Oakton 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	XXQ1652813	HLCU000002	APL2154534	Oakton 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	XXQ1652813	HLCU000002	APL2154534	Oakton 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	XXQ1652814	HLCU000005	APL2158956	Oakton 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	XXQ1652814	HLCU000005	APL2158956	Oakton 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	XXQ1652815	HLCU000004	APL2156042	Oakton 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	XXQ1652815	HLCU000004	APL2156042	Oakton 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	XXQ1652816	HLCU000003	APL2155842	Oakton 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	XXQ1652816	HLCU000003	APL2155842	Oakton 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 displays the LAS 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 shows "Billing Information" for account HRCF-1096, including company name (Oakton Trucking), tax ID, and billing address. It also lists financial details like current balance (\$23.05) and pending charges (\$0.00). Below this, the "Adjustments" sub-tab is active, showing a table of adjustments.

Amount	Credit	Type	Reason	Description	Invoice	Status	Date
\$2.01		MANUAL	Rental Tax Debit USORFPCZA - Porton 4 trips day tax		28547HRCF	POSTED	03/23/2014 00
\$33.45		MANUAL	Debit when number of trips exceeds 4 ; 4 trips day test		28547HRCF	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 - Norfolk 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