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# **Ratemaker® User's Guide**

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**Version 1.0**

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## VERSION CONTROL

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4.0	12/12/2018	Denise Wilson	Revised format, updated screens and corresponding topics to reflect software and functional changes.	Beta Software: v1.0.18323.10-2

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# Section 1: Introduction

## Ratemaker Overview

*Ratemaker*® is a freight rating engine that enables you to calculate shipment costs based on your company's freight rates that are maintained in the Ratemaker database. This application can be accessed using a web browser or through Cass's web services.

The *Ratemaker*® database is customized for each client's unique, specific needs based on their carriers, routes, accessorial codes, shipping conditions and qualifiers. This enables them to efficiently produce accurate rating results and helps them to make the best choice to transport their product(s).

This document explains how to access and use the *Ratemaker*® application to open and search for rates based on saved queries, create and save a new query, enter or change criteria, review and print the rating results, and select optional search features.

## Accessing Ratemaker

The *Ratemaker* application requires a unique set of credentials and are not the same as your CassPort credentials, which are required if your company uses the CassPort application. If you do not have a *Ratemaker* user ID and password, contact your Ratemaker Administrator or email [RatingSupport@cassinfo.com](mailto:RatingSupport@cassinfo.com).

To access *Ratemaker*, you can enter the following web address into your browser: <https://my.cassport.com/Ratemaker/>. Alternatively, you can select *Ratemaker* from the *CassPort Client* menu, if available at your company.

### NOTES:

- If you are accessing *Ratemaker* for the first time, you must change the temporary login password. Refer to "**Changing Your Temporary Ratemaker Password**" for details on this procedure once you have logged into CassPort.
- For *Ratemaker* support, call the Ratemaker Help Line at 314-406-5535 or email [RatingSupport@cassinfo.com](mailto:RatingSupport@cassinfo.com).

## Changing Your Ratemaker Temporary Password

The first time you access *Ratemaker*, you must use the application's temporary password. Once entered, you'll be prompted to enter a new, unique password which includes the following:

- 8-10 characters in length
- A minimum of one alpha character
- A minimum of one numerical digit
- A minimum of one special character, such as “!, @, and %”
- Not be one of 32 previous passwords

### To change the temporary password:

1. From your web browser, enter the following: <https://my.cassport.com/Ratemaker/>
2. The *Ratemaker Login* window displays.

**NOTE:** If you don't know or forgot your username, call or email Ratemaker Support at 314-406-5535 or [RatingSupport@cassinfo.com](mailto:RatingSupport@cassinfo.com).

3. Enter your *username* and *temporary password* that you received via email in the *Password* field.
4. Click . The  progress indicator displays.

The “*Password has expired*” dialog box displays.

- a. Enter a new, unique password in the *New Password* field.

**REMINDER!** Your new password must:

- 8-10 characters in length
- Include a minimum of one alpha character
- Include a minimum of one numerical digit
- Include a minimum of one special character, such as “!, @, and &”
- Not be one of 32 previous passwords

- b. Enter your new password again in the *Confirm Password* field.

5. Click  to continue or  to exit without changing the password.

**NOTE:** You may change your password at any time. To do this, login into *Ratemaker* and select the **File – Change Password** menu option and follow the prompts.

## Logging into Ratemaker

Any time after changing your user password, refer to the following steps to log into *Ratemaker* from your web browser, or if your company uses *CassPort*, go to “**Logging into Ratemaker From CassPort**” for log in steps.

### Logging into Ratemaker From Your Web Browser

**To log into Ratemaker:**

1. From your web browser, enter the following: <https://my.cassport.com/Ratemaker/>.

The *Ratemaker Login* window displays.



#### NOTES:

- If you are accessing *Ratemaker* for the first time, refer to the previous topic, “**Changing Your Ratemaker Temporary Password**” for instructions on changing the temporary password.
- Click the *Show Password*  icon to display the password as it's entered to verify you're entering it correctly.

- Click **Login**. The **Please Wait** progress indicator displays while *Ratemaker* loads.

The *Ratemaker Home Page* displays:

The screenshot shows the CassPort RateMaker interface. At the top, there is a navigation bar with 'CassPort' and 'RateMaker' logos. Below this is a menu with tabs: 'File', 'Shipment', 'Stop-Offs', 'Shipment Conditions', 'Accessorials', 'Modes/SCACs', and 'Shipment Qualifiers'. The 'Shipment' tab is active. The main area contains a search form with the following fields and options:

- Search:** A text input field with a search icon.
- Search Type:** Radio buttons for 'Shipment Rating' (selected), 'Best Rate', and 'Rate Inquiry'.
- Mode:** A dropdown menu.
- Ship Date:** A text input field with the value '03/05/2019'.
- Bill To / Cust ID:** A text input field.
- Carrier:** A dropdown menu.
- Route Name:** A dropdown menu.
- Route Components:** A radio button option.

Below the search form are two columns for 'Origin' and 'Destination'. Each column has radio buttons for 'Location' (selected) and 'User-Defined'. The 'Origin' and 'Destination' sections include dropdown menus for 'Country' (set to 'US - UNITED STAT'), text input fields for 'City', and dropdown menus for 'State' and 'Postal'.

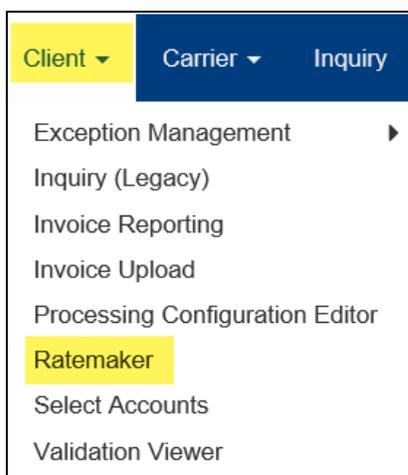
At the bottom of the form is a 'Commodity' section with a dropdown menu, a 'Sub' field, and three 'Qty' fields (Qty 1, Qty 2, Qty 3) with dropdown menus. The 'Qty 1' dropdown is set to 'LB-Pounds'. There is also a 'Delete' button.

At the bottom right of the form are three buttons: 'Search', 'Clear', and 'Save'. The footer of the page contains the text 'Copyright © 2019 - Cass Information Systems, Inc.' and 'RateMaker (v1.0.19056.17-2)'.

## Logging into Ratemaker From CassPort

Refer to the following information only if you access *Ratemaker* from *CassPort*.

- Log into *CassPort*. Next, from the *Client / Carrier* menu option, select *RateMaker*.



**NOTE:** Your *Client / Carrier* menu options may be different that those shown above.

2. The *Ratemaker Login* window displays and your *CassPort* credentials populate the *username* and *password* fields.

## Logging Out

When finished working in *Ratemaker*, always log out to properly close the application. If you access *Ratemaker* from *CassPort*, refer to “**Logging Out of Ratemaker from CassPort**” in this section.

### Logging Out of Ratemaker

To **log out** of *Ratemaker*:

Select  – **Logout**. The *Ratemaker* Login window displays as follows:

**NOTE:** You must re-enter your *Ratemaker* username / password to resume working in *Ratemaker*.

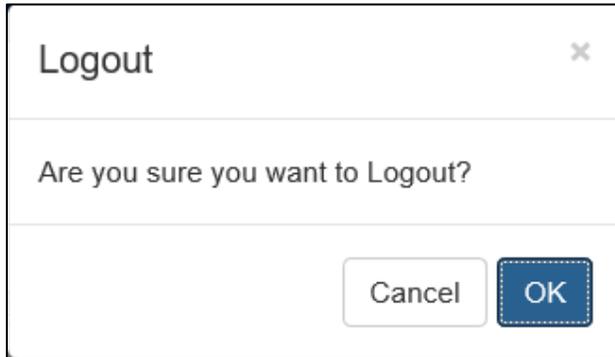
## Logging Out of Ratemaker From CassPort

Refer to the following information only if you access *Ratemaker* from *CassPort*.

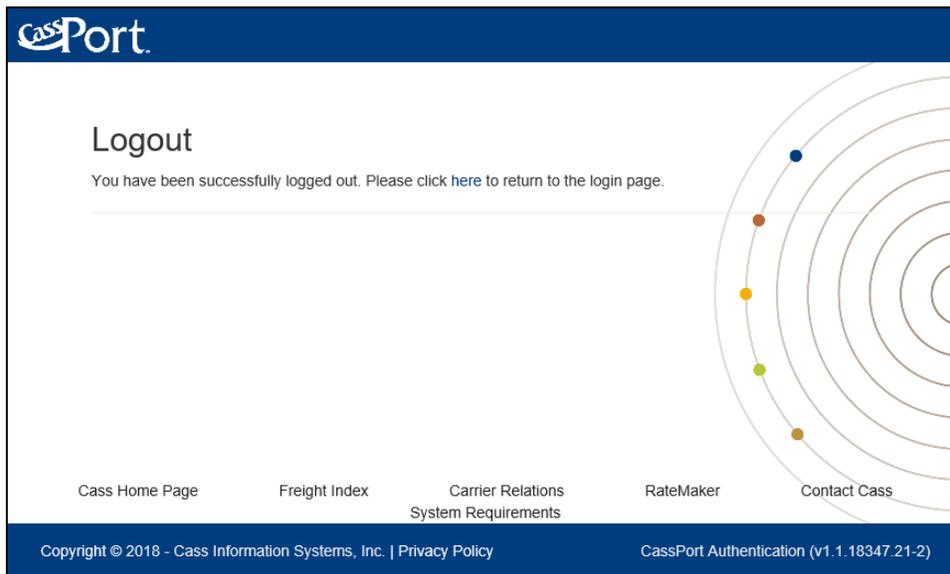
### To log out of Ratemaker from CassPort:

1. Click .

The *Logout* confirmation dialog box displays:



2. Click  to logout; the message "You have been successfully logged out" displays.



OR

3. Click  to remain in *Ratemaker*.

## Section 2: Understanding the Ratemaker Home Page

This section explains how to use *Ratemaker's* options, provides an overview of *Ratemaker* window elements, explains the *Shipment* tab fields, and includes procedures for searching and opening saved queries.

### The Ratemaker Home Page Overview

The *Ratemaker* window displays the *Shipment* tab, which is *Ratemaker's* home page. This window allows you to enter shipment information and to run inquiries on entered criteria, search type, shipment mode, carrier, origin, destination, commodity, weight and type of unit.

#### Example of the Ratemaker Home Page

The screenshot shows the Ratemaker Home Page interface. At the top, the title bar displays 'CassPort Ratemaker' (1). Below the title bar is a navigation menu with tabs: 'File' (2), 'Shipment', 'Stop-Offs', 'Shipment Conditions', 'Accessorials', 'Modes/SCACs', and 'Shipment Qualifiers' (3). The main content area is a search form. It includes a search input field (4), a search type selector (radio buttons for 'Shipment Rating', 'Best Rate', and 'Rate Inquiry'), and various input fields for 'Mode', 'Carrier', 'Ship Date', 'Bill To / Cust ID', 'Route Name', and 'Route Components...'. Below these are origin and destination sections, each with radio buttons for 'Location' and 'User-Defined', and dropdowns for 'Country', 'City', 'State', and 'Postal'. A commodity section includes a dropdown, 'sub', and three quantity fields with unit selectors. At the bottom right, there are 'Search', 'Clear', and 'Save' buttons (5). The footer contains 'Copyright © 2019 - Cass Information Systems, Inc.' and 'Ratemaker (v1.0.19056.17-2)'.

### Ratemaker Home Page Elements

1. **Ratemaker Title Bar** – displays *Ratemaker* indicating application is currently running.
2. **File Menu** – provides the options to print, logout or exit *Ratemaker*, and change password. Refer to “**Section 3: Working in Ratemaker –The File Menu Options**” heading to learn more about these options.
3. **Ratemaker Tabs** – the *Shipment*, *Stop-Offs*, *Shipment Conditions*, *Accessorials*, *Modes/SCACs* and *Shipment Qualifiers* tabs provide options to search for rating information based on selected / entered criteria. The *Rating Results* tab is added once a search query is completed.

**NOTE:** Refer to the next topic, “**Shipment Tab Overview**,” for more information or “**Section 3: Working in Ratemaker**” and “**Section 4: Understanding the Optional Search Tabs**” for details on the rating results and entering criteria on the optional search tabs.

4. **Shipment Tab Options** – this is the default home tab and it provides the user with search query options. It is used to enter the minimum required shipment information to look up freight rates, calculate freight costs for a single carrier, or compare shipment costs for multiple carriers. See the next topic, **“Shipment Tab Overview,”** to learn more.
5. **Search, Clear & Save Buttons** – these buttons allow the user to initiate a rating search query, clear entered search criteria and start a different search query, or save the user-defined search criteria. They are available on all tab windows.

**FOR CASSPORT USERS ONLY!**

Refer to the following information only if you access *Ratemaker* from *CassPort*.



1. **CassPort Logo** – allows the user to return to the *CassPort* home page and select other *CassPort* applications; you may return to *Ratemaker* via the Client / Carrier menu without logging in.
2. **CassPort Title Bar** – displays *Ratemaker* and other applications the client has been given access, the name of the user currently logged in, and the *CassPort Logout* option.
3. **User Name** – displays the name of the user currently logged in.
4. **Logout** – allows the user to logout out of *CassPort* bypassing the **File – Logout** option.

## The Shipment Tab Overview

The **Shipment Tab** is *Ratemaker's* default window and it is used to enter shipment information, referred to as criteria, to search or query for rates. You may also search for saved queries, as needed, or expand your query by selecting other optional search tabs, such as *Stop-Offs* or *Shipment Conditions*. Refer to **“Section 4: Understanding Optional Search Tabs”** for more details on these search options.

**Example of the Shipment Tab Window**

A screenshot of the Shipment Tab window. It contains various input fields and buttons. Red circles with numbers 1 through 8 point to specific features: 1 points to the search input field, 2 to the search button, 3 to the mode dropdown, 4 to the ship date field, 5 to the bill to/cust ID field, 6 to the carrier dropdown, 7 to the origin and destination location sections, and 8 to the commodity section. The commodity section includes a dropdown for commodity, a 'sub' field, and three quantity fields (Qty 1, Qty 2, Qty 3) with unit dropdowns. At the bottom right, there are 'Search', 'Clear', and 'Save' buttons.

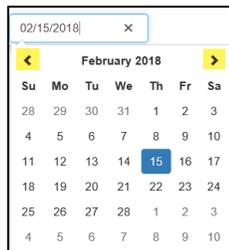
## Shipment Tab Fields & Options

1. **Search Query**  – used to select and run a saved query.

**NOTE:** Saved queries can be accessed and run by other people in your organization.

2. **Search Types** – choose one of the following three search types:
  - a. *Shipment Rating (SR)* calculates total shipping charges for a single selected / entered carrier or route, mode, origin, destination, and commodity / quantity combination.
  - b. *Best Rate® (BR)* calculates total shipping charges for multiple carriers and ranks carriers from lowest to highest cost. The carriers can be selected / entered using their SCAC or Ratemaker can select carriers based on Mode(s).
  - c. *Rate Inquiry (RI)* search displays all rates for either a single carrier or for all available carriers for the entered shipment information.
3. **Mode** – this is a required field; select a transportation mode option, i.e., *Less than Truckload (LTL), Truckload, Rail Carload, etc.*
4. **Ship Date** – defaults to the current date.

- a. To change the date, click in the field to display a calendar popup window and use the navigation buttons, if needed:



- b. If a saved query is opened or searched, this date changes to the date the query was last saved. The *Shipment date* doesn't change unless the user removes or changes the date.
5. **Bill To / Cust ID** – this field is blank and is used if the rates are restricted to Customer shipper number or other criteria.
6. **Carrier, Route Name & Route Components**
  - a. *Carrier* – this is the default and is used to run a query for a single carrier by entering or selecting the SCAC; these searches are based on one or more carriers. This option ensures that all possible shipping results are found.

- b. *Route Name* – the user can search for rates based on client-specific routing. Route names are based on each client's internal route naming conventions and are setup by the *Ratemaker* rate-loading staff.

**Example of a Route Name List of Options**

☉ Route Name:

ANDY
ANY1 BRNSV MEX1
ANY1 DELR MEX1
ANY1 ELP MEX1
ANY1 LAR MEX1
CIN-SING
CR BNSF3
CSXT NS
INDY-01
KATHY MEX
MEXI ELP ANY1
NS CR 13
NS CSXT 22
NS0001
NS0002
TESTROUTE
UP CHGO
UP CSXT
USA982
0926
0986

- c. *Route Components* – when selected, the user can search for rates based on specific route components. Refer to **“Route Components”** in this section for more information.

7. **Origin / Destination – Locations and User Defined** – the origin and destination sections must be completed according to the shipment's movement.

- a. *Location* – this is the default and is comprised of the *Country, State, City or Location and Postal* zip code fields.

**Example Showing Origin / Destination Location Fields**

Origin: <input checked="" type="radio"/> Location <input type="radio"/> User-Defined	Destination: <input checked="" type="radio"/> Location <input type="radio"/> User-Defined
Country: US - UNITED STATES	Country: US - UNITED STATES
City:	City:
State: Postal:	State: Postal:

- i. *Country* – defaults to *US-United States*; click the dropdown to list countries in order by country code.
- ii. *State* – click the dropdown to list states, if applicable to the selected country.  
**TIP:** To quickly locate a country or state, click the dropdown and type the first letter of the country/state name. For example, to locate the country *“Thailand,”* enter *“t”* several times to list countries beginning with *“T”* or *“W”* from the state dropdown list to locate *“Washington.”*
- iii. *City* – enter a city; this field is required.
- iv. *Postal* – enter the zip code; this field is required.

- b. *User-Defined* – this option allows the user to select a user-defined code which are set up by the *Ratemaker Administrator* based on the client's requirements.

**Example Showing Origin / Destination User-Defined Fields**

Origin: <input type="radio"/> Location <input checked="" type="radio"/> User-Defined User-Defined Key: <input type="text"/> Location: <input type="text"/> Postal: <input type="text"/>	Destination: <input type="radio"/> Location <input checked="" type="radio"/> User-Defined User-Defined Key: <input type="text"/> Location: <input type="text"/> Postal: <input type="text"/>
--	---

- i. *User-Defined Key* – enter the 1<sup>st</sup> value of the applicable key to display the list of keys. For example: enter “10” to display the list as shown here:

User-Defined Key:	10	X
Location	1001	
	1002	
Postal:	1003	
	1004	
	1005	
	1006	
	101	

- ii. *Location* – this is a non-editable field and automatically populates with the applicable *location* based on the key selected. For example: if “1001” is selected as the user-defined key, the corresponding location, “Mill Hall, PA US,” displays as shown here:

Origin:	<input type="radio"/> Location <input checked="" type="radio"/> User-Defined
User-Defined Key:	1001
Location:	MILL HALL, PA US
Postal:	<input type="text"/>

- iii. *Postal* – enter the location's zip code.

- 8. **Commodity Section** – this section is comprised of multiple fields pertaining to the type of commodity being moved, such as the quantity of items, the unit of measurement, and the commodity category. Refer to “**The Commodity Section**” in this section for more details.

## Route Components

This option allows a user to search for rates based on specific route components. Multiple component rows can be added, as needed, to search by the different usage options, such as FD-Final destination, or DS-Destination.

### Example of the Route Components Fields

The screenshot shows a form titled "Route Components". It contains several fields and a "Delete" button. Red circles with numbers 1 through 5 point to specific elements: 1 points to the Usage dropdown, 2 points to the SCAC dropdown, 3 points to the Break checkbox, 4 points to the Rule 260 dropdown, and 5 points to the Country, State, City / Location, and Postal fields. A red box highlights the Country, State, City / Location, and Postal fields.

## Route Components Fields

1. **Usage** –select the specific transportation component of the product movement, *i.e., initial origin, final destination, beyond, etc.*, as described in the following table:

Usage Option	Description
Blank	Not required
B	Beyond carrier
DD	Destination dray carrier
DS	Destination carrier
FD	Final destination carrier
IO	Initial origin carrier
OD	Origin dray carrier
OS	Origin switch carrier
P	Prior carrier

2. **SCAC** – this dropdown allows the user to select the applicable SCAC type.
3. **Break checkbox**  – this option is not selected by default. When selected, it indicates a combination break at this point. Ratemaker looks for rates from the origin to the first combination break (segment). It then looks for rates from the combination break to the next combination break or to the final destination segment(s). Ratemaker looks for rates using the carriers for each segment.
4. **Rule 260** – allows the user to select the applicable Rule 260 instead of entering a city / state.
5. **Country/State/City OR Location / Postal** – allows the user to select or enter the applicable field junction information.

## The Commodity Section

The **Commodity section** is located at the bottom of the **Shipment** tab and is comprised of fields related to the type of items or products being moved. Each client has unique commodity options based on their loaded contracts. Some commodities are user-defined, others are based on industry standards or universal characteristics, such as *C-Class* and *N-NMFC*. Within each commodity type, there are subcategories that further specify the items being moved.

### Example of the Commodity Section on the Shipment Tab

## Commodity Section Fields

1. **Commodity Type** – select a commodity type from the dropdown list; refer to the following table for descriptions.

**NOTE:** The “*blank*” option shown at the top of the list allows the user to remove a previous selection.

Refer to the following table for descriptions of each commodity type:

Commodity Types	Description
<b>C-Class</b>	Selecting a “ <i>C</i> ” indicates that a freight-class(es) will be entered in the commodity field and these codes can be used to rate <i>Less than Truckload</i> shipments.
<b>H-Harmonized</b>	Selecting a “ <i>H</i> ” indicates that <b>H</b> armonized codes will be entered in the commodity field to rate the shipment. These codes can be used to load rates, and if used, need to be entered in the rating queries.  The <i>Harmonized Tariff Codes</i> is an internationally standardized system of names and numbers to classify traded products.
<b>N-NMFC</b>	Selecting a “ <i>N</i> ” indicates that a <b>N</b> ational <b>M</b> otor <b>F</b> reight <b>C</b> lassification number will be entered in the commodity field to rate the shipment. These codes can be used to load rates, and if used, need to be entered in rating queries.  The <i>NMFC</i> is a standardized method for classifying commodities for LTL shipments.  <b>NOTE:</b> The <i>Sub</i> field (see <i>field #3 below</i> ) can be used to define a <i>NMFC</i> commodity type.
<b>S-STCC</b>	Selecting a “ <i>S</i> ” indicates that a <b>S</b> tandard <b>T</b> ransportation <b>C</b> ommodity <b>C</b> ode(s) will be entered in the commodity field to rate the shipment. These codes can be used to load rates, and if used, need to be entered in rating queries.  The <i>STCC</i> is a standardized method for classifying commodities for rail shipments.

Commodity Types	Description
U-UserDefined	This refers to a customized client-defined commodity and can be used to load rates and run <i>Ratemaker</i> queries on their loaded contracts.

2. **Commodity** – select a commodity from the dropdown list. These options are client-specific and based on client-requirements and the loaded contracts.
3. **Sub** – used to specify a *NMFC* sub option, if applicable.
4. **Qty 1 – Qty 3** – select the applicable UOM (*LB-Pounds, CTN-Cartons, EA-Each, LTR-Liters, etc.*) from the dropdown list for the commodity items.
5. **Qty (UOM) User Entry** – enter the applicable unit values based on the UOM selected in the Qty 1-Qty 3 fields.

## Running a Query

This section provides procedures running a new and saved query.

### PROCEDURE 1: RUNNING A NEW QUERY

When a user wants to search for rates, they must enter criteria and/or select the applicable options from dropdown fields (*i.e., Mode, Carrier, Country, etc.*) on the *Shipment* tab, and other optional search tabs, *e.g. Stop-Offs, Shipment Conditions, and Modes/SCACs*, based on the shipment requirements.

#### Example of the Shipment Tab Query Fields

The screenshot displays the 'Shipment' tab in the Ratemaker interface. At the top, there are several tabs: 'File', 'Shipment \*', 'Stop-Offs', 'Shipment Conditions', 'Accessorials', 'Modes/SCACs', and 'Shipment Qualifiers'. Below these are search and filter options. The 'Search' field is empty. 'Mode' and 'Carrier' are dropdown menus. 'Ship Date' is set to '03/05/2019'. 'Bill To / Cust ID' is a text field. 'Route Name' and 'Route Components...' are also dropdown menus. The 'Search Type' section has three radio buttons: 'Shipment Rating' (selected), 'Best Rate', and 'Rate Inquiry'. Below this is a section for 'Origin' and 'Destination', each with radio buttons for 'Location' (selected) and 'User-Defined'. Both 'Origin' and 'Destination' have dropdowns for 'Country' (set to 'US - UNITED STAT'), text fields for 'City', and dropdowns for 'State' and 'Postal'. The 'Commodity' section includes a dropdown menu, a 'Sub' field (highlighted with a red box), and three 'Qty' fields: 'Qty 1' (set to 'LB-Pounds'), 'Qty 2', and 'Qty 3'. At the bottom right, there is a 'Search' button (highlighted with a red box), a 'Clear' button, and a 'Save' button.

**To run a query:**

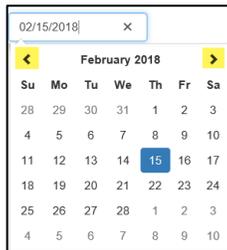
1. From the *Shipment* tab, select each option as described below:

a. Choose a **Search Type**.

- i. *Shipment Rating (SR)* is the default, and it calculates total shipping charges for a single selected carrier or route, mode, origin, destination, and commodity / quantity combination.
- ii. *Best Rate® (BR)* calculates total shipping charges for multiple carriers and ranks carriers from lowest to highest cost. The carriers can be selected / entered using their SCAC or Ratemaker can select carriers based on Mode(s).
- iii. *Rate Inquiry (RI)* displays all rates for either a single carrier or for all available carriers for the entered shipment information.

b. Click the **Mode** dropdown to select the applicable mode, *i.e.*, *Less than Truckload (LTL)*, *Truckload*, *Rail Carload*, *etc.*

c. Press **TAB** or click **Ship Date** to select a different ship date; use the calendar navigation buttons as shown here:



d. Select a routing option as described below:

- i. *Carrier* – this is the default; click to select a carrier from the dropdown list.
- ii. *Route Name* – click the option, then select a client-specific route from the dropdown list.

**NOTE:** For information on the *Carrier* or *Route Name* fields, see “**Shipment Tab Fields & Options,**” **Item #6**, addressed earlier in this section.

iii. *Route Components* – click the option and select the applicable options.

**NOTE:** Refer to the “**Route Components**” discussed earlier in this section for details.

2. Complete the **Origin & Destination's – Location or User-Defined** fields as described below:

a. *Location* – this is the default; choose to look up rates based on location.

<p><b>Origin:</b> <input checked="" type="radio"/> Location <input type="radio"/> User-Defined</p> <p>Country: <input type="text" value="US - UNITED STAT"/> ▼</p> <p>City: <input type="text"/></p> <p>State: <input type="text" value="▼"/> Postal: <input type="text"/></p>	<p><b>Destination:</b> <input checked="" type="radio"/> Location <input type="radio"/> User-Defined</p> <p>Country: <input type="text" value="US - UNITED STAT"/> ▼</p> <p>City: <input type="text"/></p> <p>State: <input type="text" value="▼"/> Postal: <input type="text"/></p>
--	---

- i. Select the *Country*, if different than the US.
- ii. Enter the *City*, *State* and *Postal zip code*.

- b. *User-Defined* – choose to look up rates based on a selected user-defined name.

Enter or select the *User-Defined* name.

Origin: <input type="radio"/> Location <input checked="" type="radio"/> User-Defined	Destination: <input type="radio"/> Location <input checked="" type="radio"/> User-Defined
User-Defined Key: <input type="text"/>	User-Defined Key: <input type="text"/>
Location: <input type="text"/>	Location: <input type="text"/>
Postal: <input type="text"/>	Postal: <input type="text"/>

**NOTES:**

- See “**Shipment Tab Fields & Options,**” **Item #7,** for more information.
- If an incorrect or invalid zip code is entered in the *Postal* (zip code) field, it displays with a red border as shown here: Postal:

3. In the **Commodity** section, complete as described below:

**NOTE:** Refer to “**The Commodity Section**” addressed earlier in this section for more information on these fields.

Commodity					
<input type="text" value=""/>	<input type="text" value="Sub"/>	Qty 1	<input type="text" value="LB-Pounds"/>	Qty 2	<input type="text" value=""/>
<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value="Delete"/>

- Click the **Commodity Type** dropdown and select an option: *C-Class, H-Harmonized, N-NMFC, S-STCC or UserDefined.*
- Click the **Commodity Option** dropdown to select an option or subcategory of the selected *Commodity type, e.g. C-Class, H-Harmonized, etc.*
- Click in the **Sub** field if a *NHMC* commodity type is selected in **Item #3a** above, then choose an option.
- Click the **Qty 1 – Qty 3 (UOM)** dropdown(s) to select the applicable unit of measurement(s) (*LB-Pounds, CTN-Cartons, EA-Each, LTR-Liters, etc.*).
- Click in the **Qty 1 – 3 user entry** field(s) and enter the applicable unit number based on the selected UOM in the corresponding *Qty 1 – Qty 3* field(s).

**Example Showing Quantities & UOMs for C-Class Commodities**

Commodity					
<input type="text" value="C-Class"/>	<input type="text" value="sub"/>	Qty 1	<input type="text" value="LB-Pounds"/>	Qty 2	<input type="text" value="LB-Pounds"/>
<input type="text" value="175"/>	<input type="text" value=""/>	<input type="text" value="17000"/>	<input type="text" value="18000"/>	<input type="text" value=""/>	<input type="text" value="Delete"/>
<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value="Delete"/>

- f. Click or press **TAB** to the next row; click the dropdown to select the applicable option and enter the quantity as shown below.

**Example Showing Different C-Class Commodity Option (200 vs. 175)**

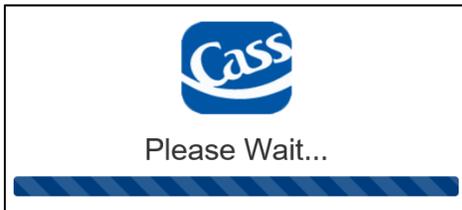
Commodity	C-Class	Sub	Qty 1	LB-Pounds	Qty 2	LB-Pounds	Qty 3	
175			17000		18000		0	Delete
200			19000		20000			Delete
								Delete

**NOTE:** Additional rows are added automatically by advancing to the **Qty 2** field. To remove a row, click **Delete** at the end of the applicable row.

- 4. Click other search tabs, *Shipment Qualifiers*, *Stop-Offs*, etc., to add more criteria.

**NOTE:** Refer to the “**Section 4: Understanding the Optional Search Tabs**” to learn about the optional search tabs.

- 5. Click . The “*Please Wait*” processing message displays as shown here:



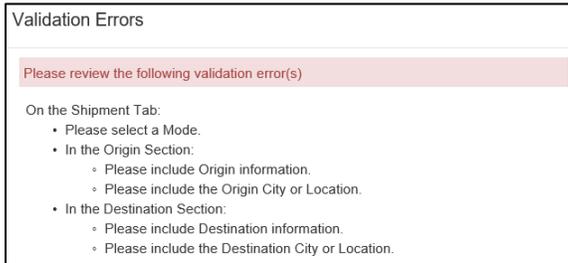
The **Rating Results** tab displays showing the query results.

File	Shipment *	Stop-Offs	Shipment Conditions	Accessorials	Modes/SCACs	Shipment Qualifiers
	<b>Rating Results</b>					
<b>Route Detail</b>						
<b>Total Charge:</b> 7,916.57 USD			<b>Total Segments:</b> 2			
<b>Total Quantity:</b> 150000 LB			<b>Route Info:</b> RC UP CSXT			
Seg	Status	Route Detail Description			Subtotal Amount	
+	1	E	UP: JCT: EAST ST LOUIS; IL US 62201 ORIG: ORANGE; , TX US 77630 DEST: EAST ST LOUIS; , IL US 62201			4693.75
+	2	E	CSXT ORIG: EAST ST LOUIS; , IL US 62201 DEST: DETROIT; , MI US 48202			3222.82

**NOTES:**

- Refer to “**Section 3: Working in Ratemaker – Reviewing the Rating Results Tab**” for information on this topic.
- If errors are detected, a “**Validation Errors**” window displays listing all missing or incorrect information.

**Example of the Validation Errors Dialog Box**

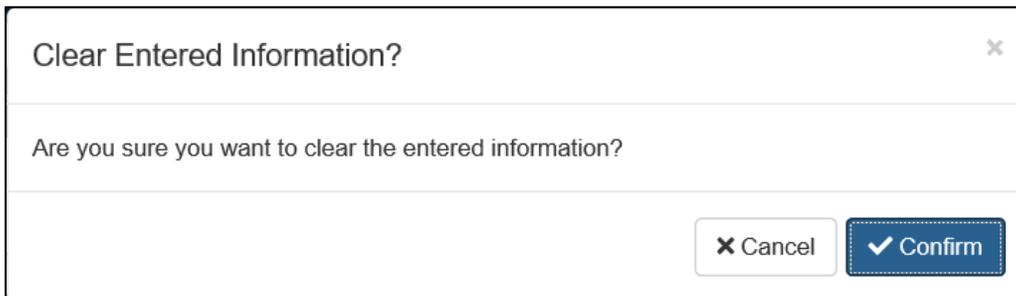


- Notice that the **Shipment tab** includes an asterisk (\*), indicating that criteria has been entered.



6. Click the **Shipment tab** to review the criteria or to start a different query.

- a. Click  to delete criteria and start a new query. The “*Clear Entered Information*” dialog box displays.



- b. Click  to continue, or  to not delete the criteria.

**NOTES:**

- The **Rating Results tab** is deleted once the criteria is cleared.
- You can also click  on the **Rating Results tab** to start a different query.

## PROCEDURE 2: RUNNING A SAVED QUERY

This procedure addresses how to search by using a saved query which are pre-defined, client-specific queries that may be used to search for rating results. When a saved query is opened or searched, the *Shipment* tab fields and one or more of the optional search tabs may be populated with criteria.

**Example:** If a user selects the “\*07 Rail Through” query, many of the fields on the **Shipment tab**, e.g. *mode*, *ship date*, *carrier*, *origin / destination locations*, are updated, as shown below.

### Example Showing the “\*07 Rail Through” Query Selected & Shipment Tab Window Updated

The screenshot shows the 'Open Saved Queries' window with a table of queries. The query '\*07 RAIL THROUGH' is selected and highlighted in yellow. An arrow points from this query to the 'Shipment' tab form, which is also shown with several fields populated with yellow highlights.

Status	Search Name	Ship Date	Type	Updated
RD	*01 LTL RATE INQUIRY	10/30/2018	RI	11/27/2018
RT	*021 SR TL	10/30/2018	SR	12/11/2018
RT	*022 SR LTL	10/30/2018	SR	10/30/2018
RT	*03 LTL VS TL	2/18/2018	BR	10/3/2018
RT	*04 OCEAN TACOMA	2/15/2018	SR	10/23/2018
RT	*041 OCEAN LONG BEACH	10/27/2015	SR	10/23/2018
RT	*07 RAIL THROUGH	2/15/2018	SR	2/15/2018
RT	*08 RULE 11	10/30/2018	SR	11/12/2018
RT	*09 PROPO			
RT	*10 PROPO			
RT	*11 TANK T			
RT	*12 OVER D			

The 'Shipment' tab form shows the following populated fields:

- Search: \*07 RAIL THROUGH
- Mode: RC-Rail Carload
- Carrier: UP-UNION PACIFIC
- Ship Date: 02/15/2018
- Origin: Location (ORANGE, TX)
- Destination: Location (CHICAGO, IL)
- Commodity: U-UserDefir (FAK)
- Qty 1: 3
- Qty 2: 0
- Qty 3: 0

**NOTE:** In the example shown above, the yellow highlighted fields reflect which fields were populated on the *Shipment* tab.

**To run a saved query:**

1. From the **Shipment tab**, click the **Search Query** icon  .

The **Open Saved Queries** window displays.

Open Saved Queries				
Status	Search Name	Ship Date	Type	Updated
RD	*01 LTL RATE INQUIRY	10/30/2018	RI	11/27/2018
RT	*021 SR TL	10/30/2018	SR	12/11/2018
RT	*022 SR LTL	10/30/2018	SR	10/30/2018
RT	*03 LTL VS TL	2/16/2018	BR	10/3/2018
RT	*04 OCEAN TACOMA	2/15/2018	SR	10/23/2018
RT	*041 OCEAN LONG BEACH	10/27/2015	SR	10/23/2018
RT	*07 RAIL THROUGH	2/15/2018	SR	2/15/2018
RT	*08 RULE 11	10/30/2018	SR	11/12/2018
RT	*09 PROPORTIONAL 1 OF 2	4/18/2007	SR	10/27/2015
RT	*10 PROPORTIONAL 2 OF 2	4/18/2007	SR	3/2/2010
RT	*11 TANK TRUCK ACCESSORIALS	10/30/2018	SR	10/30/2018
RT	*12 OVER DIMENSION WIDTH 15%	5/11/2006	SR	10/17/2018

Search:

**NOTE:** The saved queries are client-specific and are listed alphanumerically by query name.

2. Click to select the applicable query and  .

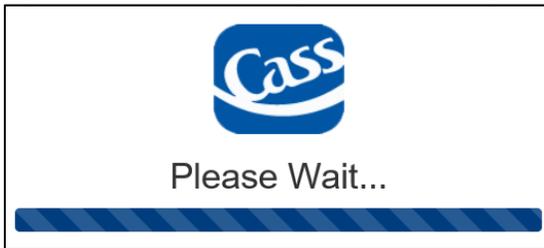
**OR**

3. Double-click to select and open.

Open Saved Queries				
Status	Search Name	Ship Date	Type	Updated
RD	*01 LTL RATE INQUIRY	10/30/2018	RI	11/27/2018
RT	*021 SR TL	10/30/2018	SR	12/11/2018
RT	*022 SR LTL	10/30/2018	SR	10/30/2018
RT	*03 LTL VS TL	2/16/2018	BR	10/3/2018
RT	*04 OCEAN TACOMA	2/15/2018	SR	10/23/2018
RT	*041 OCEAN LONG BEACH	10/27/2015	SR	10/23/2018
RT	*07 RAIL THROUGH	2/15/2018	SR	2/15/2018
RT	*08 RULE 11	10/30/2018	SR	11/12/2018
RT	*09 PROPORTIONAL 1 OF 2	4/18/2007	SR	10/27/2015
RT	*10 PROPORTIONAL 2 OF 2	4/18/2007	SR	3/2/2010
RT	*11 TANK TRUCK ACCESSORIALS	10/30/2018	SR	10/30/2018
RT	*12 OVER DIMENSION WIDTH 15%	5/11/2006	SR	10/17/2018

Search:

The "Please Wait" message box displays indicating that *Ratemaker* is processing.



**Example of the Shipment Tab Showing the "03 LTL VS TL" Query's Criteria**

File ▾		Shipment *		Stop-Offs		Shipment Conditions		Accessorials		Modes/SCACs *		Shipment Qualifiers	
Search: *03 LTL VS TL		Search Type: <input type="radio"/> Shipment Rating		<input checked="" type="radio"/> Best Rate		<input type="radio"/> Rate Inquiry							
Mode: ML-Motor less than truckload		Ship Date: 02/16/2018		Bill To / Cust ID:									
<input checked="" type="radio"/> Carrier:		<input type="radio"/> Route Name:		<input type="radio"/> Route Components...									
Origin: <input checked="" type="radio"/> Location <input type="radio"/> User-Defined		Destination: <input checked="" type="radio"/> Location <input type="radio"/> User-Defined											
Country: US - UNITED STATES		Country: US - UNITED STATES											
City: BROWNSVILLE		City: SEATTLE											
State: TN		State: WA											
Postal: 38012		Postal: 98101											
Commodity C-Class		Sub		Qty 1 LB-Pounds		Qty 2		Qty 3					
175				17000		0		0				Delete	
▾												Delete	

**NOTES:**

- All pre-defined criteria is shown highlighted in yellow above, and includes the *Search Type, Mode, Ship Date, Carrier, Origin / Destination Location fields, Commodity type, subtype and Qty 1 UOM and weight.*
- Any dropdown field may be modified to alter the search results, *i.e., Ship Date, Commodity UOM and weights, etc.*
- The **Shipment** and **Modes/SCACs** tabs display with an asterisk (\*) indicating that criteria will be applied to the query results.
- Click on a **tab** to display the selected, if any, criteria or options on that window.
- To learn more about the optional search tabs, *i.e., Modes/SCAC, Accessorials, etc.*, go to **"Section 4: Understanding the Optional Search Tabs."**

4. Click . The "Please Wait" processing message displays as shown here:



The **Rating Results** tab displays showing the query results.

**Example of the Rating Results Tab**

Best Rate® Results								
Equalization Value Basis: PM-Per mile						Distance: 2,314 Miles		
Currency: USD-U.S. DOLLAR						Milemaker Current Shortest		
View by Mode: <input type="text" value=""/>								
	Rank	Mode	Carrier SCAC	Carrier Name	Total Charge	Equalized	Transit Days	
+	1	ML	FXNL	FEDEX NATIONAL	2,864.63	1.24	5	
+	2	ML	RDWY	YRC FREIGHT	2,942.05	1.27	5	
+	3	ML	AVRT	AVERITT EXPRESS	2,992.38	1.29	5	
+	4	ML	ABFS	ABF FREIGHT	3,096.90	1.34	5	
+	5	ML	UPGF	UPS FREIGHT	3,096.90	1.34	5	
+	6	MV	CRPS	CRST	3,424.72	1.48	5	
+	7	MV	SWFT	SWIFT	3,424.72	1.48	5	
+	8	MV	ENGC	C R ENGLAND	3,471.00	1.50	5	
+	9	MV	HJBT	J B HUNT	3,471.00	1.50	5	
+	10	MV	PRIJ	PRIME	3,494.14	1.51	5	
+	11	MV	SCNN	SCHNEIDER NATIONAL	3,494.14	1.51	5	
+	12	MV	WENP	WERNER	3,540.42	1.53	5	

**NOTE:** To learn how to navigate and review the results, refer to **Section 3: Reviewing the Rating Results Tab**.

5. Choose one of the following:
- a. Click  to delete criteria and start a new query.
- OR**
- b. Click  if you modified the saved query and want to save those changes as a new query. Be sure to enter a new query name to prevent losing the original query's criteria. Refer to **"Section 3: Working in Ratemaker – Saving Queries"** for more information.

## Section 3: Working in Ratemaker

This section addresses how to review and print the results list, expand and collapse the rating records, save a new and modified saved query, and use the *File* menu options.

### Reviewing the Rating Results Tab

The *Rating Results* tab is created when a user searches for a query's rates. It lists one or more carrier's rates in order by lowest to highest total charges. The charges are comprised of transportation factors, such as *rate type*, *discounts*, and *fuel surcharges*.

#### Example Showing Rating Results Tab

The screenshot shows the 'Rating Results' tab in the Ratemaker interface. At the top, there are navigation tabs: File, Shipment \*, Stop-Offs, Shipment Conditions, Accessorials, Modes/SCACs \*, Shipment Qualifiers, and Rating Results (which is highlighted). Below the tabs, the title 'Best Rate® Results' is displayed. On the left, there are settings for 'Equalization Value Basis: PM-Per mile', 'Currency: USD-U.S. DOLLAR', and a 'View by Mode:' dropdown menu. On the right, it shows 'Distance: 2,314 Miles' and 'Milemaker Current Shortest'. The main content is a table with 8 columns: Rank, Mode, Carrier SCAC, Carrier Name, Total Charge, Equalized, and Transit Days. The table lists 12 carriers, with the first row (FEDEX NATIONAL) having a total charge of 2,864.63 and 5 transit days. Each row has a '+' icon on the left, indicating that the records are currently collapsed.

	Rank	Mode	Carrier SCAC	Carrier Name	Total Charge	Equalized	Transit Days
+	1	ML	FXNL	FEDEX NATIONAL	2,864.63	1.24	5
+	2	ML	RDWY	YRC FREIGHT	2,942.05	1.27	5
+	3	ML	AVRT	AVERITT EXPRESS	2,992.38	1.29	5
+	4	ML	ABFS	ABF FREIGHT	3,096.90	1.34	5
+	5	ML	UPGF	UPS FREIGHT	3,096.90	1.34	5
+	6	MV	CRPS	CRST	3,424.72	1.48	5
+	7	MV	SWFT	SWIFT	3,424.72	1.48	5
+	8	MV	ENGC	C R ENGLAND	3,471.00	1.50	5
+	9	MV	HJBT	J B HUNT	3,471.00	1.50	5
+	10	MV	PRIJ	PRIME	3,494.14	1.51	5
+	11	MV	SCNN	SCHNEIDER NATIONAL	3,494.14	1.51	5
+	12	MV	WENP	WERNER	3,540.42	1.53	5

### Expanding / Collapsing Rate Records

The rate records initially display as a summary of the overall total charges as shown by the **+** *expand record* icon that precedes each record. To see a record's rate details, click the *expand record* icon. Once the details are displayed, a **-** *collapse record* icon is shown. To collapse or hide the record's details, click the *collapse record* icon.

**Example Showing Rating Records Expanded**

### Best Rate® Results

Equalization Value Basis: PM-Per mile Distance: 2,314 Miles  
 Currency: USD-U.S. DOLLAR Milemaker Current Shortest

View by Mode:

Rank	Mode	Carrier SCAC	Carrier Name	Total Charge	Equalized	Transit Days
- 1	ML	FXNL	FEDEX NATIONAL	2,864.63	1.24	5

### Shipment Rating Results

Total Charge: 2,864.63 USD Total Quantity: 17,000.00 LB Distance: 2,314 Miles  
 Transit Days: 5 Milemaker Current Shortest

Charges	Ext Qty/Units	Rate / Charge	Rate Type	Currency	Extended
+ 1 FXNL * DEMO * 1 * LITECZ02	30,000.00 LB	27.75	PH	USD 2/1/2010	8,325.00
+ Discount FXNL * DEMO * 1 *	8,325.00	63.00	RP	USD 1/1/2018	-5,244.75
+ Fuel surcharge DEMO * FUEL * LTL * SURCHARGE	3,080.25	7.00	RP	USD 2/13/2018	-215.62

+ 2	ML	RDWY	YRC FREIGHT	2,942.05	1.27	5
+ 3	ML	AVRT	AVERITT EXPRESS	2,992.38	1.29	5
+ 4	ML	ABFS	ABF FREIGHT	3,096.90	1.34	5
+ 5	ML	UPGF	UPS FREIGHT	3,096.90	1.34	5
+ 6	MV	CRPS	CRST	3,424.72	1.48	5
+ 7	MV	SWFT	SWIFT	3,424.72	1.48	5
+ 8	MV	ENGC	C R ENGLAND	3,471.00	1.50	5

**NOTE:** In the example shown above, there are 3 separate line items or rows, which are also collapsed. Click the **+** *expand record* icon on each applicable line to display details for each *rate type* charge or discount.

**Example Showing Rating Record's Details Expanded**

Shipment Rating Results						
Total Charge: 2,864.63 USD		Total Quantity: 17,000.00 LB		Distance: 2,314 Miles		
Transit Days: 5				Milemaker Current Shortest		
Charges	Ext Qty/Units	Rate / Charge	Rate Type	Currency	Extended	
- 1 FXNL * DEMO * 1 * LITECZ02	30,000.00 LB	27.75	PH	USD 2/1/2010	8,325.00	
Rate Details						
Effective Date:	1/31/2010	Expiration Date:				
Distance:	2,314	Miles Milemaker Current Shortest				
Base:	27.75	PH Per hundredweight	Adjusted Rate:	27.75 U.S. DOLLAR		
Ext/Conv Amt:	8325	U.S. DOLLAR	1.0000	8,325.00 U.S. DOLLAR		
Basis Quantity:	T	30,000 LB Pounds				
Precedence:	333					
Charge Type:	LI Line item charge rating					
Application						
Service Type	D Direct Service					
Proportional						
Last Update:	2/16/2018	Updated By:	PAWLOWSC			
- Discount FXNL * DEMO * 1 *	8,325.00	63.00	RP	USD 1/1/2018	-5,244.75	
Adjustment Detail						
Applies To:	LN	Linehaul charge				
Adjustment Type:	DSC	Discount				
Effective Date:	12/31/2017	Expiration Date:				
Sequence:	1					
Arithmetic Operation:	S	Subtract or decrease				
Base Amount:	63	RP	Percent			
Ext./Conv. Amt:	-5244.75	U.S. DOLLAR	1.00	-5244.75 U.S. DOLLAR		
Basis Quantity:	8325					
Service Type:	Subtract or decrease					
Last Update:	2/15/2018	Updated By:	PAWLOWSC			

**NOTE:** In the example shown above, the first 2-line items' details are expanded as shown highlighted in yellow. To collapse or hide the line item's details, click the  *collapse record* icon again for each detail line.

**Expand / Collapse Icon Summary**

Refer to the following table for steps on using the expand and collapse icons.

ICON DESCRIPTION	STEPS:
 <b>Expand Rating Record</b>	<ul style="list-style-type: none"> <li>Click  to display details for the current rating record.</li> <li>Click  for each detail row to display information such as the <i>charge type, service type, base rate applied, etc.</i></li> </ul>
 <b>Collapse Rating Record</b>	Click  to collapse or hide detail rows for current record.

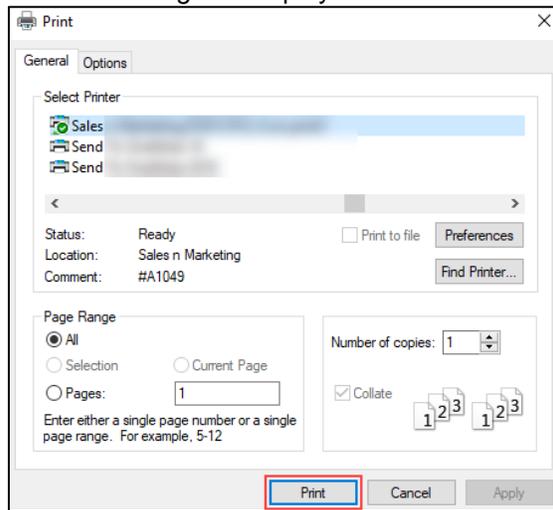
## Printing the Rating Results & Other Tab Information

The user can print the *Rating Results* tab or any *Ratemaker* tab information by choosing **File – Print**.

**To print the rating results or any Ratemaker tab:**

1. From the applicable tab or window, select **File – Print**.

The *Print dialog box* displays.



2. Click **Print** to print on your default printer or **Cancel** to exit without printing.

## Saving Queries

When a user runs a query often using the same criteria, they can choose to save it in order to save time and to allow other co-workers in their office to use it.

### PROCEDURE 3: SAVING A NEW QUERY

**To save a user-defined query:**

1. From the *Shipment* tab, select the applicable criteria and options.
2. Click other optional search tabs, *Shipment Qualifiers*, *Stop-Offs*, etc., as needed.

**NOTE:** Refer to the “**Section 4: Understanding the Optional Search Tabs**” to learn more about these tabs.

3. Click . The *Save Search Criteria* dialog box displays.



The dialog box titled "Save Search Criteria" contains a "Search:" label followed by a text input field. At the bottom right of the dialog, there are two buttons: "Save" and "Cancel".

4. Enter a query name in the *Search* field and click .

The “*Please Wait*” processing message displays.



**NOTE:** From the *Shipment* tab, click the *Search Query* icon  to view the new saved query listed.

## PROCEDURE 4: SAVING A MODIFIED SAVED QUERY

Each client's saved queries are based on their loaded contracts, however, they can be modified, if needed. However, it's recommended that the modified query is saved with a new name to prevent the original criteria from being lost.

This procedure explains how to save a modified query with a new name.

### To modify and save an existing query:

1. From the *Shipment* tab, open the applicable saved query.
2. Select and modify the applicable field's criteria, as needed.
3. Click other applicable search tabs (*Shipment Conditions, Modes/SCACs, etc.*) to add or delete criteria.

**NOTE:** Refer to "**Section 4: Understanding Optional Search Tabs**" for details.

4. Click . The current query name displays as shown below.

#### Example Showing the "\*03 LTL VS TL" Saved Query Name

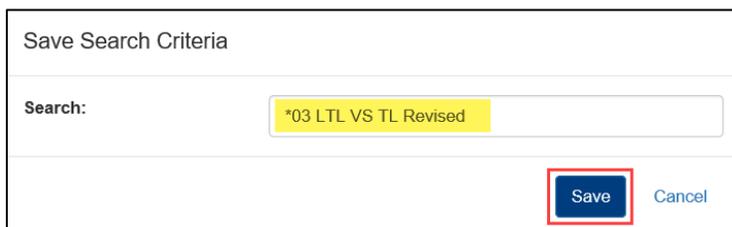


5. In the **Search** field, select or highlight the current name, as shown below:

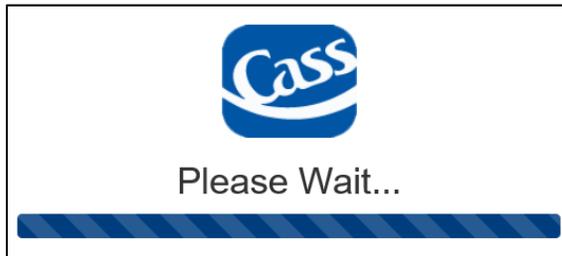


**IMPORTANT NOTE:** If you highlight or select the current query name, this ensures that the original saved query's selections are not lost!

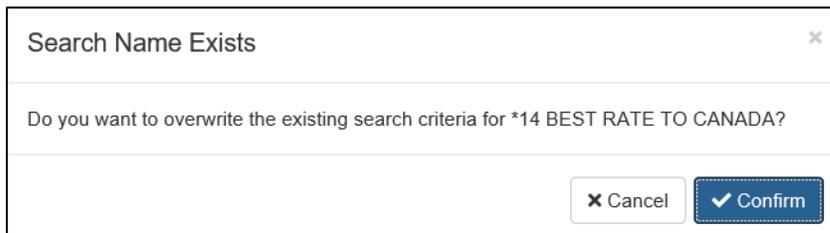
6. Enter a new name for the query and click .



The *Please Wait* processing message displays, as shown here:

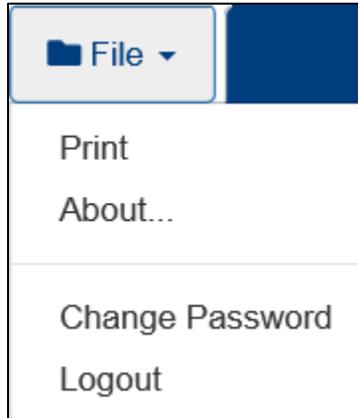


**IMPORTANT NOTE:** If the “***Search Name Exists***” dialog box displays, this indicates that you did not highlight or select the query name. Click  to prevent overwriting the original saved query.



## File Menu Options

As previously discussed, the  **File** menu is used to log out of *Ratemaker* and to print any tab's information. This topic briefly summarizes all options, including *About* and *Change Password*.



### Print

Use the **File – Print** option to print information on any tab. Refer to “**Section 2: Working in Ratemaker – Printing the Rating Results & Other Tab Information**” for these steps.

### About

The *About* option displays *Ratemaker* contact information, including the *24-hour Help Line phone number* and *email address*, as shown below.



## Change Password

You can change your password at any time as needed or when prompted by *Ratemaker*. Your new password must:

- 8-10 characters in length
- Include a minimum of one alpha character
- Include a minimum of one numerical digit
- Include a minimum of one special character, such as “!, @, and &”
- Not be one of 32 previous passwords

## Logout

Select the **File – Logout** menu option when finished working in *Ratemaker*. Refer to “**Section 1: Logging Out of Ratemaker**” for more information.

### FOR CASSPORT USERS ONLY!

Click the  button and follow the prompts to logout. Refer to “**Section 1: Logging Out of Ratemaker from CassPort**” for more information.

## Section 4: Understanding the Optional Search Tabs

This section describes the optional search tab windows: *Stop-Offs*, *Shipment Conditions*, *Accessorials*, *Modes/SCACs*, and *Shipment Qualifiers*. These tabs allow you to select or add other search criteria to precisely select carrier rates that fit many transportation conditions.

### NOTES:

- The **Search, Clear and Save** buttons may be used from all tab windows.
- All tabs are available for *Shipment Rating*, *Best Rate®* and *Rate Inquiry* searches unless otherwise indicated in this section.

## Stop-Offs Tab

The *Stop-Offs* tab allows the user to select one or more stop-offs or freight stop types along the route, e.g. *PIT-Pickup in Transit*, *POE-Point of Entry*, and *POL-Port of Lading*, select the country and state, and enter the city / location, postal zip code and quantity.

### Example of the Stop-Offs Tab

Stop-off Type	Country	State	City / Location	Postal	Stop / Pickup Quantity	
SIT-Stop in t						Delete

Search Clear Save

## Stop-Off Tab Fields

1. **Stop-Off Type** – select the type of stop-off from the dropdown list; *SIT-Stop in Transit* is the default.
2. **Country, State, City / Location, Postal** – allows the user to enter or select the applicable information. The *State* field is disabled if it's not applicable to the selected country.
3. **Stop / Pickup Quantity** – allows the user to enter a stop or pickup quantity.

## Shipment Conditions

The *Shipment Conditions* tab provides a list of codes associated with rates for specific conditions, such as service types, equipment types, sizes or dimensions. Rates for conditions are assigned by the *Ratemaker Administrator* and are client-specific based on customer requirements and contracts. The user may select one or more conditions for a query.

### Example of the Shipment Conditions Tab

### Shipment Conditions Tab Field Descriptions:

1. **Code** – select the client-specific shipment conditions code, e.g. *AF-Air Freight*, *CN-Container*, *RR-Rail Car* from the dropdown list.
2. **Qualifier 1 / Qualifier 2** – enter up to two qualifiers, which are used to provide further definition of the code. For example, “*BC*” for box car, and the qualifier can be “*54*” which represents the number of feet.

## Accessorials

The *Accessorials* tab provides a list of client specific codes that are setup by the *Ratemaker Administrator* based on each client’s contracts. The user may select one or more accessorial codes for a query.

### Example of the Accessorials Tab

### Accessorials Tab Fields

1. **Code** – select a client-specific accessorial code, e.g. *BL-Bill of Lading*, *DI-Destination Inland*, *OI-Origin Inland Charge* from the dropdown list.
2. **Quantity** – enter the applicable quantity.
3. **Unit Type** – select the unit type, e.g. *BAG-Bags*, *CAR-Cars*, *DRM-Drums* from the dropdown list.

## Modes/SCACs

The *Modes/SCACs* tab provides a list of client-specific modes and SCACs (**Standard Carrier Alpha Codes**) which are letter identifiers assigned to transportation companies.

**NOTE:** This tab is available for *Best Rate®* and *Rate Inquiry* searches only; it is disabled when a *Shipment Rating* search is selected.

### Example of the Modes/SCACs Tab

## Modes/SCACs Tab Fields

1. **Override Mode** – the override mode code entered in this field will be defaulted in the *Mode* field if blank, and a SCAC is entered in the *SCAC* field.
2. **Equalization Value Basis** – select a method for comparing total freight charges on a per kilometer, per gallon, per hundred mile, per mile, per short ton, or per unit.
3. **Mode** – this dropdown field is used to select the applicable mode, *e.g. Less than Truckload (LTL), Truckload, Rail Carload, etc.*
4. **SCAC** – enter or select a valid SCAC.

## Shipment Qualifiers

The *Shipment Qualifiers* tab is used to input distance variables, such as the distance the shipment is loaded, empty, the number of units (*KM, Miles, etc.*) and the source, e.g. *shortest route HHGCB distance from MileMaker and ALK-Distance from ALK PC-Miler.*

The *Shipment Qualifiers* tab window is divided into 2 main sections: ***Input Distance and Qualifiers***, each described below.

### Input Distance Section

This section allows the user to enter all distance-related information, as shown below.

#### ***Example of the Shipment Qualifiers Tab – Input Distance Section Fields***

The screenshot shows a form titled "Input Distance" with four fields. Each field is highlighted with a red circle containing a number: 1 for "Loaded", 2 for "Empty", 3 for "Units", and 4 for "Source". The "Units" and "Source" fields are dropdown menus.

### Input Distance Fields

1. *Loaded* – enter the distance the shipment traveled loaded.
2. *Empty* – enter the distance the shipment traveled empty.
3. *Units* – select the applicable unit, e.g. *Kilometers, Miles, etc.*, from the dropdown list that the shipment's loaded and empty distance's rates are calculated.
4. *Source* – select the source, e.g. *ALK, HHG, etc.*, from the dropdown list that the shipment's loaded and empty rates are calculated.

## Qualifiers Section

This section allows the user to enter information or select the applicable options to include in the rating's calculations.

### Example of Shipment Qualifiers Tab – Qualifiers Section Fields

Qualifiers	
Consignee Code: <input type="text"/>	Continuous Movement: <input type="checkbox"/> A
Equipment Initial: <input type="text"/>	Equipment Number: <input type="text"/>
Interstate Only: <input type="checkbox"/> B	Loaded Backhaul / Return Trip: <input type="checkbox"/> C
Loaded at Code: <input type="text"/>	
Number of Trailers / Cars: <input type="text" value="1"/>	
Pass Thru Amount: <input type="text"/>	Pass Thru Currency Code: <input type="text" value="v"/>
Proportional / Rule 11: <input type="checkbox"/> D	
Service Type Restriction: <input type="text" value="v"/>	Total Charge Currency Code: <input type="text" value="v"/>
Shipper Code: <input type="text"/>	

## Input Distance Fields

1. *Consignee Code* – enter the applicable consignee code.
2. *Equipment Initial & Equipment Number*– enter the equipment's initial and associated number, if any.
3. *Loaded at Code* – enter the applicable code that shipment was loaded.
4. *Number of Trailers / Cars* – defaults to 1; enter the total number of trailers or cars used in the shipment.
5. *Pass Thru Amount & Pass Thru Currency Code* – enter the pass thru amount and the associated currency code.
6. *Service Type Restriction* –select the applicable service restriction, if any, from the dropdown list.
7. *Total Charge Currency Code* – select the total charge currency code from the dropdown list.
8. *Shipper Code* – enter the applicable shipper code.

## Checkoff Box Options

- A. *Continuous Movement* – click to select this option to include it in the rating's calculation.
- B. *Interstate Only* – click to select option to include interstate only mileage / in the rating's calculation.
- C. *Loaded Backhaul / Return Trip* – click to select this option to include the return trip / loaded backhaul in the rating's calculation.
- D. *Proportional / Rule 11* – click this option, if applicable.