### Document Reviewers / Approvers

<table>
<thead>
<tr>
<th>Name</th>
<th>Position</th>
<th>Reviewer</th>
<th>Reviewed and Approver</th>
<th>Sign-off Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rick Manley</td>
<td>Rating Systems Support Analyst</td>
<td>Rick Manley</td>
<td>1/24/2019</td>
<td>1/24/2019</td>
</tr>
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</table>

### VERSION CONTROL

<table>
<thead>
<tr>
<th>Version</th>
<th>Date</th>
<th>By</th>
<th>Description of Changes</th>
<th>Version Release</th>
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</thead>
<tbody>
<tr>
<td>4.0</td>
<td>12/12/2018</td>
<td>Denise Wilson</td>
<td>Revised format, updated screens and corresponding topics to reflect software and functional changes.</td>
<td>Beta Software: v1.0.18323.10-2</td>
</tr>
</tbody>
</table>
SECTION 4: UNDERSTANDING THE OPTIONAL SEARCH TABS .......................... 32
STOP-OFFS TAB .................................................................................. 32
SHIPMENT CONDITIONS ..................................................................... 33
ACCESSORIALS .................................................................................. 33
MODES/SCACs .................................................................................. 34
SHIPMENT QUALIFIERS ....................................................................... 35

Input Distance Section ......................................................................... 35
Qualifiers Section ................................................................................ 36
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.

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.
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.

   ![Login Window](image)

   **NOTE:** If you don’t know or forgot your username, call or email Ratemaker Support at 314-406-5535 or RatingSupport@cassinfo.com.

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

   The “Password has expired” dialog box displays.

   ![Password Expired](image)
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 **Change Password** to continue or **Cancel** 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/](https://my.cassport.com/Ratemaker/).

   The *Ratemaker Login* window displays.

   ![Login Window](image)

   **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.
2. Click **Login**. The progress indicator displays while *Ratemaker* loads.

The *Ratemaker Home Page* displays:

![Ratemaker Home Page](image)

**Logging into Ratemaker From CassPort**

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

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

   ![Client / Carrier Menu](image)

   **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.

![Ratemaker Login Window](0)

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

![Ratemaker Login Window](0)

**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 Logout.

   The Logout confirmation dialog box displays:

   ![Logout dialog box]

   Are you sure you want to Logout?

   Cancel OK

2. Click OK to logout; the message “You have been successfully logged out” displays.

   ![Logout confirmation message]

   OR

3. Click Cancel 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

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. **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** – displays the name of the user currently logged in.

**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**
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:
      
      ![Calendar Popup Window]

   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**

<table>
<thead>
<tr>
<th>Route Name:</th>
</tr>
</thead>
<tbody>
<tr>
<td>ANDY</td>
</tr>
<tr>
<td>ANY1 BRNSV MEX1</td>
</tr>
<tr>
<td>ANY1 DELR MEX1</td>
</tr>
<tr>
<td>ANY1 ELP MEX1</td>
</tr>
<tr>
<td>ANY1 LAR MEX1</td>
</tr>
<tr>
<td>CIN-SINO</td>
</tr>
<tr>
<td>CR BNSF3</td>
</tr>
<tr>
<td>CSX7 NS</td>
</tr>
<tr>
<td>INY1-01</td>
</tr>
<tr>
<td>KATHY MEX</td>
</tr>
<tr>
<td>MEX0 ELP ANY1</td>
</tr>
<tr>
<td>NS CR 10</td>
</tr>
<tr>
<td>NS CSX7 22</td>
</tr>
<tr>
<td>NS0001</td>
</tr>
<tr>
<td>NS0002</td>
</tr>
<tr>
<td>TESCTROUTE</td>
</tr>
<tr>
<td>UP CHGO</td>
</tr>
<tr>
<td>UP CSX7</td>
</tr>
<tr>
<td>USA002</td>
</tr>
<tr>
<td>0650</td>
</tr>
<tr>
<td>0999</td>
</tr>
</tbody>
</table>

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**

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 | | Destination |
|--------|-------------------|
| User-Defined Key: | Location: User Defined | User-Defined Key: Location: User Defined |
| Location | | |
| Postal | | |

i. **User-Defined Key** – enter the 1st 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 Example](image)

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:

![Location Example](image)

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

![Route Components Table]

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:

<table>
<thead>
<tr>
<th>Usage Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Blank</td>
<td>Not required</td>
</tr>
<tr>
<td>B</td>
<td>Beyond carrier</td>
</tr>
<tr>
<td>DD</td>
<td>Destination dray carrier</td>
</tr>
<tr>
<td>DS</td>
<td>Destination carrier</td>
</tr>
<tr>
<td>FD</td>
<td>Final destination carrier</td>
</tr>
<tr>
<td>IO</td>
<td>Initial origin carrier</td>
</tr>
<tr>
<td>OD</td>
<td>Origin dray carrier</td>
</tr>
<tr>
<td>OS</td>
<td>Origin switch carrier</td>
</tr>
<tr>
<td>P</td>
<td>Prior carrier</td>
</tr>
</tbody>
</table>

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**

<table>
<thead>
<tr>
<th>Commodity Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>C-Class</td>
<td>Selecting a “C” indicates that a freight-class(es) will be entered in the commodity field and these codes can be used to rate <em>Less than Truckload</em> shipments.</td>
</tr>
<tr>
<td>H-Harmonized</td>
<td>Selecting a “H” indicates that Harmonized 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 <em>Harmonized Tariff Codes</em> is an internationally standardized system of names and numbers to classify traded products.</td>
</tr>
<tr>
<td>N-NMFC</td>
<td>Selecting a “N” indicates that a National Motor Freight Classification 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 <em>NMFC</em> is a standardized method for classifying commodities for LTL shipments. <strong>NOTE</strong>: The <em>Sub field</em> (see field #3 below) can be used to define a <em>NMFC</em> commodity type.</td>
</tr>
<tr>
<td>S-STCC</td>
<td>Selecting a “S” indicates that a Standard Transportation Commodity Code(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 <em>STCC</em> is a standardized method for classifying commodities for rail shipments.</td>
</tr>
</tbody>
</table>

**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.
Commodity Types | Description
---|---
U-UserDefined | This refers to a customized client-defined commodity and can be used to load rates and run Ratemaker 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**
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:

   ![Calendar Image]

   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.

   ![Location Field Image]

   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.

![User-Defined Name Selection](image)

**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 Field with Red Border](image)

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 Selection](image)

a. Click the **Commodity Type** dropdown and select an option: *C-Class, H-Harmonized, N-NMFC, S-STCC or UserDefined.*

b. Click the **Commodity Option** dropdown to select an option or subcategory of the selected Commodity type, e.g. *C-Class, H-Harmonized,* etc.

c. Click in the **Sub** field if a *NHMC* commodity type is selected in **Item #3a** above, then choose an option.

d. 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.).

e. Click in the **Qty 1 – Qty 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**

![Example Table](image)
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)**

<table>
<thead>
<tr>
<th>Commodity</th>
<th>Qty 1</th>
<th>Qty 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>175</td>
<td>17000</td>
<td>18000</td>
</tr>
<tr>
<td>200</td>
<td></td>
<td>20000</td>
</tr>
</tbody>
</table>

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

4. Click other search tabs, *Shipments 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.
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**

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

   ![Clear Entered Information Dialog Box]

   b. Click **Confirm** to continue, or **Cancel** to not delete the criteria.

NOTES:

- The **Rating Results tab** is deleted once the criteria is cleared.

- You can also click **Clear** 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**

![Image showing the “*07 Rail Through” Query Selected & Shipment Tab Window Updated]

**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](image)

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

2. Click to select the applicable query and **Open**.

**OR**

3. Double-click to select and open.

![Open Saved Queries](image)
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

![Example of the Shipment Tab Showing the “03 LTL VS TL” Query’s Criteria](image)

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 **Search**. The “Please Wait” processing message displays as shown here:

![Please Wait...]

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

**Example of the Rating Results Tab**

<table>
<thead>
<tr>
<th>Rank</th>
<th>Mode</th>
<th>Carrier SCAC</th>
<th>Carrier Name</th>
<th>Total Charge</th>
<th>Equalized</th>
<th>Transit Days</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>ML</td>
<td>FXNL</td>
<td>FEDEX NATIONAL</td>
<td>2,964.63</td>
<td>1.24</td>
<td>5</td>
</tr>
<tr>
<td>2</td>
<td>ML</td>
<td>ROWY</td>
<td>YRC FREIGHT</td>
<td>2,342.05</td>
<td>1.27</td>
<td>5</td>
</tr>
<tr>
<td>3</td>
<td>ML</td>
<td>AVRT</td>
<td>AVERIT EXPRESS</td>
<td>2,092.38</td>
<td>1.29</td>
<td>5</td>
</tr>
<tr>
<td>4</td>
<td>ML</td>
<td>ABF3</td>
<td>ABF FREIGHT</td>
<td>3,095.90</td>
<td>1.34</td>
<td>5</td>
</tr>
<tr>
<td>5</td>
<td>ML</td>
<td>UPOF</td>
<td>UPS FREIGHT</td>
<td>3,095.90</td>
<td>1.34</td>
<td>5</td>
</tr>
<tr>
<td>6</td>
<td>MV</td>
<td>CP8S</td>
<td>CP8T</td>
<td>3,424.72</td>
<td>1.48</td>
<td>5</td>
</tr>
<tr>
<td>7</td>
<td>MV</td>
<td>SWFT</td>
<td>SWIFT</td>
<td>3,424.72</td>
<td>1.48</td>
<td>5</td>
</tr>
<tr>
<td>8</td>
<td>MV</td>
<td>ENGC</td>
<td>C R ENGLAND</td>
<td>3,471.00</td>
<td>1.50</td>
<td>5</td>
</tr>
<tr>
<td>9</td>
<td>MV</td>
<td>JHJ</td>
<td>J H JUHN</td>
<td>3,471.00</td>
<td>1.50</td>
<td>5</td>
</tr>
<tr>
<td>10</td>
<td>MV</td>
<td>PRIU</td>
<td>PRIME</td>
<td>3,846.14</td>
<td>1.51</td>
<td>5</td>
</tr>
<tr>
<td>11</td>
<td>MV</td>
<td>SCUN</td>
<td>SCHNEIDER NATIONAL</td>
<td>3,846.14</td>
<td>1.51</td>
<td>5</td>
</tr>
<tr>
<td>12</td>
<td>MV</td>
<td>WENP</td>
<td>WERNER</td>
<td>3,540.42</td>
<td>1.53</td>
<td>5</td>
</tr>
</tbody>
</table>

**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 **Clear** to delete criteria and start a new query.

   OR

b. Click **Save** 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

<table>
<thead>
<tr>
<th>Rank</th>
<th>Mode</th>
<th>Carrier SCAC</th>
<th>Carrier Name</th>
<th>Total Charge</th>
<th>Equalized</th>
<th>Transit Days</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>ML</td>
<td>FXNL</td>
<td>FEDEX NATIONAL</td>
<td>2,864.65</td>
<td>1.24</td>
<td>5</td>
</tr>
<tr>
<td>2</td>
<td>ML</td>
<td>RWWY</td>
<td>YRC FREIGHT</td>
<td>2,942.00</td>
<td>1.27</td>
<td>5</td>
</tr>
<tr>
<td>3</td>
<td>ML</td>
<td>AVIT</td>
<td>AVERITT EXPRESS</td>
<td>2,982.38</td>
<td>1.29</td>
<td>5</td>
</tr>
<tr>
<td>4</td>
<td>ML</td>
<td>AIRFS</td>
<td>AIR FREIGHT</td>
<td>3,090.40</td>
<td>1.34</td>
<td>5</td>
</tr>
<tr>
<td>5</td>
<td>ML</td>
<td>UPGF</td>
<td>UPS FREIGHT</td>
<td>3,096.50</td>
<td>1.34</td>
<td>5</td>
</tr>
<tr>
<td>6</td>
<td>MV</td>
<td>CRPS</td>
<td>CRST</td>
<td>3,424.72</td>
<td>1.48</td>
<td>5</td>
</tr>
<tr>
<td>7</td>
<td>MV</td>
<td>SWFT</td>
<td>SWFT</td>
<td>3,424.72</td>
<td>1.48</td>
<td>5</td>
</tr>
<tr>
<td>8</td>
<td>MV</td>
<td>ENGC</td>
<td>C R ENGLAND</td>
<td>3,471.00</td>
<td>1.50</td>
<td>5</td>
</tr>
<tr>
<td>9</td>
<td>MV</td>
<td>HJBT</td>
<td>J B HUNT</td>
<td>3,471.00</td>
<td>1.50</td>
<td>5</td>
</tr>
<tr>
<td>10</td>
<td>MV</td>
<td>PRU</td>
<td>PRIME</td>
<td>3,484.14</td>
<td>1.51</td>
<td>5</td>
</tr>
<tr>
<td>11</td>
<td>MV</td>
<td>SONN</td>
<td>SCHNEIDER NATIONAL</td>
<td>3,484.14</td>
<td>1.51</td>
<td>5</td>
</tr>
<tr>
<td>12</td>
<td>MV</td>
<td>WENP</td>
<td>WERNER</td>
<td>5,540.42</td>
<td>1.53</td>
<td>5</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Rank</th>
<th>Mode</th>
<th>Carrier SCAC</th>
<th>Carrier Name</th>
<th>Total Charge</th>
<th>Equalized</th>
<th>Transit Days</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>ML</td>
<td>FXNL</td>
<td>FEDEX NATIONAL</td>
<td>2,864.63</td>
<td>1.24</td>
<td>5</td>
</tr>
</tbody>
</table>

Shipments Rating Results

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

<table>
<thead>
<tr>
<th>Charges</th>
<th>Ext Qty/Units</th>
<th>Rate / Charge</th>
<th>Ratio Type</th>
<th>Currency</th>
<th>Extended</th>
</tr>
</thead>
<tbody>
<tr>
<td>FXNL * DEMO * 1 * LITEC202</td>
<td>30,000.00 LB</td>
<td>27.75 PH</td>
<td>USD</td>
<td>2/1/2010</td>
<td>8,325.00</td>
</tr>
<tr>
<td>Discount</td>
<td>8,325.00</td>
<td>63.00 RP</td>
<td>USD</td>
<td>1/1/2018</td>
<td>-5,244.75</td>
</tr>
<tr>
<td>Fuel surcharge</td>
<td>3,080.25</td>
<td>7.00 RP</td>
<td>USD</td>
<td>2/13/2018</td>
<td>-215.62</td>
</tr>
<tr>
<td>RDWY YRC Freight</td>
<td>2,942.05</td>
<td>1.27</td>
<td>5</td>
<td></td>
<td></td>
</tr>
<tr>
<td>AVRT AVERITT EXPRESS</td>
<td>2,992.38</td>
<td>1.29</td>
<td>5</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ABFS ABF FREIGHT</td>
<td>3,096.90</td>
<td>1.34</td>
<td>5</td>
<td></td>
<td></td>
</tr>
<tr>
<td>UPGF UFS FREIGHT</td>
<td>3,096.90</td>
<td>1.34</td>
<td>5</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CRPS CRST</td>
<td>3,424.72</td>
<td>1.48</td>
<td>5</td>
<td></td>
<td></td>
</tr>
<tr>
<td>SWFT SWIFT</td>
<td>3,424.72</td>
<td>1.48</td>
<td>5</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ENGO C R ENGLAND</td>
<td>3,471.00</td>
<td>1.50</td>
<td>5</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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**

<table>
<thead>
<tr>
<th>Charges</th>
<th>Ext Qty/Units</th>
<th>Rate / Charge</th>
<th>Rate Type</th>
<th>Currency</th>
<th>Extended</th>
</tr>
</thead>
<tbody>
<tr>
<td>= 1</td>
<td>36,000.00 LB</td>
<td>27.76</td>
<td>PH</td>
<td>USD</td>
<td>8,325.00</td>
</tr>
</tbody>
</table>

**Rate Details**

- **Effective Date:** 1/1/2019
- **Distance:** 2,314 Miles
- **Base:** 27.75 PH Per hundredweight
- **Ext/Conv Amnt:** 8325 U.S. DOLLAR
- **Base Quantity:** 30,000 LB Pounds
- **Proportional:** 333
- **Charge Type:** L1 Line item charge rating
- **Application:** D Direct Service
- **Last Update:** 2/16/2019

**Adjustment Detail**

- **Applies To:** LN Line haul charge
- **Adjustment Type:** DISC Discount
- **Effective Date:** 12/31/2017
- **Operation:** + Subtract or increase
- **Base:** 63 RP Percent
- **Ext/Conv Amnt:** -5,244.75 U.S. DOLLAR
- **Base Quantity:** 8325
- **Service Type:** Subtract or increase
- **Last Update:** 2/15/2018

**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.

<table>
<thead>
<tr>
<th>ICON DESCRIPTION</th>
<th>STEPS:</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="up" alt="Expand Rating Record" /></td>
<td>- <strong>Click</strong> <img src="up" alt="Plus" /> to display details for the current rating record.</td>
</tr>
<tr>
<td></td>
<td>- <strong>Click</strong> <img src="up" alt="Plus" /> for each detail row to display information such as the charge type, service type, base rate applied, etc.</td>
</tr>
<tr>
<td><img src="down" alt="Collapse Rating Record" /></td>
<td>- <strong>Click</strong> <img src="down" alt="Minus" /> to collapse or hide detail rows for current record.</td>
</tr>
</tbody>
</table>
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.

   ![Print dialog box](image)

   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.

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 Save button. The current query name displays as shown below.

   ![Example Showing the “03 LTL VS TL” Saved Query Name](image)

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

   ![Save Search Criteria](image)

   **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 Save button.

   ![Save Search Criteria](image)
The *Please Wait* processing message displays, as shown here:

![Please Wait...]

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

As previously discussed, the File menu is used to logout 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 [Logout] 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 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**

<table>
<thead>
<tr>
<th>Code</th>
<th>Qualifier 1</th>
<th>Qualifier 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**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 *Accessorial* 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 Accessorial Tab**

<table>
<thead>
<tr>
<th>Code</th>
<th>Quantity</th>
<th>Unit Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Accessorial 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](image)

### 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*

<table>
<thead>
<tr>
<th>Input Distance Fields</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. <em>Loaded</em> – enter the distance the shipment traveled loaded.</td>
</tr>
<tr>
<td>2. <em>Empty</em> – enter the distance the shipment traveled empty.</td>
</tr>
<tr>
<td>3. <em>Units</em> – select the applicable unit, <em>e.g. Kilometers, Miles, etc.</em>, from the dropdown list that the shipment’s loaded and empty distance’s rates are calculated.</td>
</tr>
<tr>
<td>4. <em>Source</em> – select the source, <em>e.g. ALK, HHG, etc.</em>, from the dropdown list that the shipment’s loaded and empty rates are calculated.</td>
</tr>
</tbody>
</table>
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

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.