



CargoSmart Relationship Manager

Relationship Manager helps all parties in your logistics chain be more efficient by allowing you to share access to your shipment information and CargoSmart tools. Relationship Manager is a feature in My CargoSmart Center that lets you grant access to third-party associates who are not a party on the B/L to help plan, process, and monitor your shipment information. To keep your information secure, Relationship Manager lets the company administrator control the features associates may use, designate the duration of the relationships, and filter the shipment information that third-parties may see.

Business Benefits

- Provide timely shipment information to all shipment parties by allowing your associates to use Reports, Exception Alerts, Milestone Notifications, Cargo Tracking, and Shipment Details
- Reduce courier costs and save time by delegating B/L and Arrival Notice print privileges to parties who are not on the B/L
- Save communication costs and improve communications with third parties

Key Features

- Propose or request new company relationships to share shipment data or templates
- Accept or decline relationship proposals
- Share access to Sailing Schedule, Booking, Shipping Instructions, and Reports templates
- Define access to Shipping Instructions, B/L Print, Arrival Notice, Invoices, Shipment Details, and E-mails
- Filter the information that associates see with Shipment Coverage by carrier, party type, origin/destination, cargo type, and traffic mode
- Set effective relationship start and end dates

Sample Scenarios

- Provide access to the Import Shipments standard report for your **truckers** so that they know when your containers are ready to be picked up
- Share a customized reports template with your **customs brokers** so that they can track large volumes of inbound containers and prepare to clear them through customs
- Grant access to Shipment Details for your **distribution center contacts** so that they can make sure your shipments are on time and they can prepare for final delivery to stores and customers

Getting Started

To grant access to or request information from a third-party associate with Relationship Manager, please request your administrator to follow these steps:

1. From the Administration menu option in My CargoSmart Center, select Relationship Manager, and then Propose Relationship.
2. Complete the relationship proposal form. Upon completion, CargoSmart will send an e-mail to your associate.
3. If your associate is already a registered CargoSmart Company Member, they may accept the proposal from the Manage Relationships screen.
4. If your associate is not a registered member, then CargoSmart will provide a link to a registration form for the user. Once your associate has access to My CargoSmart Center, they may accept the proposal from the Manage Relationships section of their Relationship Manager module.

Provide CargoSmart Access to Your Entire Supply Chain:
Parties on the B/L can grant others access to their shipment data

