CONCEPT

Import and Export Operations and Incoterms Rules: Documents, Payment and Landed Cost

22 March – 2 April 2027
London - Central London four-star



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Introduction:

Import and export operations leak margin when a consignment ships under an Incoterms rule that does not fit the cargo, the invoice and bill of lading disagree, settlement conditions ignore the buyer's standing, or the landed cost of each unit is known only after arrival. This Core Concept course trains sales, purchasing and logistics teams to steer a cross-border consignment from enquiry to proof of delivery: choosing and wording the Incoterms rule, assembling the shipping paperwork, agreeing settlement conditions, briefing forwarders and customs brokers, insuring cargo and recovering losses. Participants build an Export-Import Shipment File and Landed-Cost Model for a case consignment.

Course Objectives:

- Map the export and import flow of a consignment and assign each task, charge and hand-over point to seller, buyer, carrier, forwarder, customs broker and insurer
- Select the Incoterms rule that suits the transport mode, cargo type and level of control and word the named place correctly in quotations and sales contracts
- Prepare and cross-check the commercial invoice, packing list, certificate of origin and bill of lading or waybill so that quantities, values and marks agree
- Agree settlement conditions, from cash in advance to open account, that suit the buyer's standing, the product and the destination market
- Brief forwarders and customs brokers, track shipment milestones and confirm destination labelling and conformity rules before goods leave
- Calculate landed cost per unit, place cargo insurance and pursue loss, damage and shortage claims

Target Audience:

- Export sales and order desk teams who quote delivered prices and agree Incoterms rules with overseas buyers
- Import purchasing teams who negotiate supplier delivery conditions and receive goods from abroad
- Logistics and shipping coordinators who book cargo, brief forwarders and follow consignments to the door
- Shipping paperwork officers who prepare invoices, packing lists, certificates of origin and waybills
- Credit control and accounts teams who agree settlement conditions and chase receivables on overseas sales

Course Outline:

Day 1: The Export and Import Flow and Parties to a Consignment

- Export-Import Flow Map: Enquiry, Quotation, Order, Dispatch, Clearance and Settlement
- Roles of Seller, Buyer, Carrier, Forwarder, Customs Broker, Insurer and Bank
- Pro Forma Invoice and Delivered Price Quotation Layout
- Cross-Border Exposure Register: Delivery, Non-Payment, Currency and Paperwork Failures
- Current-State Review of an Organisation's Shipping Lanes, Delivery Conditions and Recurring Delays

Day 2: The Eleven Incoterms Rules: Delivery Point, Risk Transfer and Charges

- Incoterms Rules Structure: Any-Mode Rules Versus Sea and Inland Waterway Rules
- EXW, FCA, FAS and FOB: Hand-Over Point and Seller Tasks at Origin
- CPT, CIP, CFR and CIF: Seller-Paid Main Carriage and the Two Critical Points
- DAP, DPU and DDP: Delivery at Destination and Import Clearance Allocation
- Incoterms Charges Matrix for Loading, Main Carriage, Unloading and Clearance

Day 3: Choosing the Rule and Wording It in Sales Contracts

- Rule Selection Decision Tree by Transport Mode, Cargo Type and Control Preference
- Named Place Precision in Quotations, Purchase Orders and Sales Contracts
- Frequent Misuse: Sea-Only Rules for Containerised Cargo and EXW Export Clearance Gaps
- What Incoterms Rules Leave Out: Title, Price, Currency and Remedies
- Aligning the Chosen Rule with the Contract of Carriage and Insurance Cover

Day 4: Shipping Paperwork for Exports and Imports

- Commercial Invoice Fields and Consistency Checks
- Packing List, Gross and Net Weights, Measurements and Shipping Marks
- Certificate of Origin Types and Supplier Origin Declarations
- Transport Papers at Overview: Bill of Lading, Sea Waybill, Air Waybill and Road Consignment Note
- Cross-Check Matrix Linking Purchase Order, Invoice, Packing List and Waybill

Day 5: Settlement Options and Week-One Guided Case

- Settlement Options Ladder: Cash in Advance, Letter of Credit, Bank Collection and Open Account
- Bank Collections: Documents Against Payment and Documents Against Acceptance
- Letter of Credit Basics for Exporters and Importers: Parties, Presentation Window and Conditions
- Guided Case: Quotation, Incoterms Rule and Settlement Option for an Industrial Export Order
- Guided Case: Paperwork Review for a Consumer Goods Import Consignment

Day 6: Foreign Market Entry Requirements and Product Conformity

- Destination Market Checklist: Import Permits, Restricted Goods and Licences
- Product Labelling Rules: Language, Origin Marking, Contents and Safety Information
- Conformity Assessment Routes: Test Reports, Certificates of Conformity and Pre-Shipment Inspection
- International Standards and Technical Regulations Mapping for an Export Product
- Packaging and Marking Rules for Dangerous, Perishable and Fragile Cargo

Day 7: Cargo Insurance, Paperwork Errors and Claims

- Cargo Insurance Cover Options and the Institute Cargo Clauses at Overview
- Insured Value Calculation and Insurance Certificate Checks under CIP and CIF
- Paperwork Error Log: Frequent Invoice, Origin and Waybill Mistakes
- Loss, Damage and Shortage Claims: Notice, Survey Evidence and Claim File
- Seller and Buyer Disputes over Late Delivery, Wrong Incoterms and Rejected Goods

Day 8: Working with Forwarders, Customs Brokers and Internal Functions

- Forwarder Selection Criteria and Shipping Instruction Template
- Customs Broker Briefing Pack: Goods Description, Origin Evidence and Value Data
- Customs Interface Sequence: Export Declaration, Import Declaration and Goods Release
- Hand-Offs Between Sales, Purchasing, Logistics and Accounts on an Overseas Order
- Notifying Overseas Buyers and Suppliers of Delays, Holds and Paperwork Queries

Day 9: Shipment Control, Landed Cost and Operations KPIs

- Shipment Milestone Tracker from Booking to Proof of Delivery
- Landed-Cost Build-Up: Ex-Works Price, Freight, Insurance, Duties, Taxes and Local Charges
- Landed Cost per Unit Comparison Across Alternative Incoterms Rules and Suppliers
- Import-Export KPIs: Paperwork Accuracy, On-Time Dispatch, Claims Ratio and Days Sales Outstanding
- Post-Shipment Review and Lessons-Learned Log for Recurring Errors

Day 10: Capstone: Export-Import Shipment File and Landed-Cost Model

- Case Consignment Briefing Pack and Shipment File Structure
- Shipment File Build: Incoterms Rule, Paperwork, Settlement and Insurance Sections
- Landed-Cost Model Build with Sensitivity for Freight, Currency and Duty Changes
- Shipment File and Model Presentation to a Mock Commercial Review Panel
- Peer Challenge, Action Plan and Transfer to Own Shipping Lanes

Skills You Will Gain:

- Incoterms Rule Selection
- Shipping Paperwork Preparation
- Settlement Option Selection
- Market Entry Requirement Screening
- Cargo Insurance Placement
- Cargo Claims Recovery
- Landed-Cost Modelling
- Shipment Milestone Control

Why Attend This Course:

- Leave with an Export-Import Shipment File and Landed-Cost Model built on a case consignment
- Stop disputes and extra charges caused by vague named places and Incoterms rules that do not fit the cargo
- Know the true cost of an imported or exported unit before quoting, not after the goods arrive
- Compare practice with sales, purchasing and logistics peers from manufacturing, retail, food, construction and healthcare supply

Conclusion:

Import and export operations run smoothly when the Incoterms rule, shipping paperwork, settlement option, insurance and cost picture are decided together rather than function by function. Week one builds that base through the export and import flow, the eleven Incoterms rules, rule selection and contract wording, the paperwork set and settlement options. Week two adds what a shorter course leaves out: market entry and conformity, cargo insurance and claims, forwarder and broker coordination, shipment control, landed cost and KPIs. The final day produces an Export-Import Shipment File and Landed-Cost Model ready for live orders.