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COURSE BROCHURE

Import-Export Operations and Foreign Trade Management Training Course

1 – 5 February 2027
New York

Import-Export Operations and Foreign Trade Management Training Course

Ref: 1617_59198 **Date:** 1 – 5 February 2027 **Location:** New York **Fees:** 7900 GBP

Import-Export Operations and Foreign Trade Management is a 1-week training course for foreign trade officers, international purchasing, operations and sales staff who carry a deal from first inquiry to final settlement, ending with a complete transaction file and an operational checklist. Fragmented hand-offs between buyers, forwarders, brokers and banks now cause most delays and avoidable charges in cross-border trade. Jupiter Prime Training delivers this course on import-export operations.

Why Import-Export Operations Matter Now

Three pressures shape trade desks today: counterparties that must be vetted before a pro forma invoice is accepted, customs administrations that check classification and origin data electronically, and finance teams that will not release payment until documents match the order exactly. A desk that runs each deal against one checklist ships on time, clears at the first presentation and gets paid without query; a desk that relies on memory pays demurrage, storage and bank fees and repeats the same errors. The course rests on the Incoterms rules for delivery obligations and the Harmonized System HS for tariff classification.

Who Gains Most from Import-Export Operations

- Officers who open trade files, issue purchase orders and track each shipment milestone
- International purchasing staff who qualify overseas suppliers and confirm order terms
- Export sales coordinators who prepare offers, pro forma invoices and shipping instructions
- Operations staff who book transport, arrange packing and coordinate brokers
- Accounts staff who reconcile invoices, duties and bank charges at deal close

Small trading and manufacturing firms gain most when purchasing, sales and accounts staff attend together and agree one shared transaction checklist.

Import-Export Operations Capabilities

Participants learn to keep every step of a cross-border deal documented, sequenced and reconciled.

- Map the import and export deal cycle with its documents and hand-offs — the order of tasks for the trade desk
- Apply counterparty checks to suppliers and buyers — the decision to accept an order
- Specify packing, marking and cargo insurance instructions — the forwarder and insurer briefing
- Assemble clearance data on classification, origin and value — the broker's customs declaration
- Reconcile invoices, duties, freight and bank charges at closure — the deal profitability record

- Build an error log with operational KPIs — the monthly desk review with management

Key Import-Export Operations Terms

- Pro forma invoice — a preliminary invoice stating goods, quantities, price and terms, used to confirm an order and open payment arrangements.
- Commercial invoice — the final seller's invoice that customs and banks rely on to value goods and match payment.
- Packing list — a document listing each package's contents, weights and dimensions for carriers, inspectors and the consignee.
- Bill of lading — the carrier's receipt for goods shipped by sea that also evidences the contract of carriage and title.
- HS code — the internationally harmonised number that classifies a product for tariffs, statistics and import controls.
- Demurrage — a charge for holding a carrier's container or vessel beyond the free time allowed.

Import-Export Operations Day by Day

Day 1: The Trade Deal Cycle

- Import and Export Deal Cycle Map — Steps, Parties and Hand-Offs
- Inquiry, Offer and Pro Forma Invoice — Locking the Commercial Terms
- Incoterms Rules Selection — Who Arranges and Pays Each Leg
- Trade Document Set — Invoice, Packing List and Transport Document Roles
- Transaction File Structure — Version Control for Every Deal Record

Day 2: Counterparties and Order Handling

- Supplier and Buyer Vetting Checklist — Credibility, References and Trade History
- Commercial Verification of Samples and Specifications — Avoiding Quality Disputes
- Purchase Order and Sales Confirmation — Matching Quantities, Prices and Dates
- Order Tracking Milestones — Production, Readiness and Booking Dates
- Change and Cancellation Control — Amending Orders Without Losing Records

Day 3: Transport, Packing and Insurance

- Shipping Instructions to the Forwarder — Mode, Route and Cut-Off Dates
- Export Packing and Marking — Protecting Cargo and Easing Inspection
- Cargo Insurance Cover — Insured Value, Clauses and Certificates
- Delivery Coordination at Origin and Destination — Free Time and Demurrage Exposure
- Shipment Status Reporting — Keeping Buyers and Sales Informed

Day 4: Customs Clearance, Classification and Taxes

- HS Classification of Traded Goods — Duty Rate and Control Checks
- Origin Information for Clearance — Supporting Preferential Duty Claims
- Customs Value and Import Taxes — Building the Landed Cost
- Broker Briefing Pack — Data the Declaration Depends On
- Inspection Holds and Queries — Responding Fast to Release Cargo

Day 5: Practising the Transaction File

- Deal Cycle and Counterparty Checks Applied — Opening a Live Case File
- Transport and Insurance Instructions Applied — Completing the Shipping Section
- Clearance Data Applied — Completing the Customs Section
- Settlement Reconciliation and Error Log — Closing the Deal With KPIs
- Complete Transaction File and Operational Checklist — Ready for Desk Use

Applying Import-Export Operations After the Course

- Rebuild the file of one recent import or export deal against the operational checklist and record every missing document or late hand-off.
- Start an error log across the trade desk and report the three most frequent causes of delay or extra charges at month end.

Import-Export Operations Questions FAQ

What are import-export operations and why do they matter now?

Import-export operations are the tasks that carry a cross-border deal from order to settlement. They matter now because customs, carriers and banks check data electronically, so a missing or inconsistent document quickly turns into delay, storage charges or unpaid invoices.

Which roles gain most from import-export operations training?

Foreign trade officers, international purchasing staff and export sales coordinators gain most. Operations and accounts staff who book transport and reconcile charges also benefit because the course follows one deal through all their hand-offs.

How does import-export operations training differ from a freight forwarding course?

Import-export operations training follows the trader's whole deal, from vetting the counterparty to reconciling payment. A freight forwarding course concentrates on routing and carrier management, which here is only one stage of the transaction.

What do you bring back from import-export operations training?

You bring back a structured transaction file for a real deal, an operational checklist your desk can use for every order, and an error log format with KPIs for tracking delays and charges.

Import-Export Operations: The Way Forward

The complete transaction file and operational checklist first inform whether the next order is released with every document and instruction in place. Trade desk staff, brokers and accounts use it as the shared record of each deal. After the first month, revisit the error log to tighten the checklist where delays and extra charges still recur.