

 F2 GLOBAL LOGISTICS LET'S MOVE. NOW.	Records Retention Schedule – Customer Experience Forms & Templates	Document Number: RM-GL-02.01
	Department: Customer Experience	Effective Date: November 25, 2025
		Revision No 5

Record Code	Record Name	Type	Records Definition	Retention Schedule		Disposal Method
				Active	Inactive	
CXD 1.0	Transaction Monitoring	Soft	Monitoring sheet of CX for all transaction	1 year	3 years	delete
CXD 2.0	Receiving Log Book	Hard	Log book indicating date of turn-over of Job Folder to Finance and Logs for Request of Payment	1 year	3 years	shred
CXD 3.0	Overseas Agents Agency Agreement	Hard	Agency Agreement with Overseas Agents	until superseded	until superseded	shred
CXD 4.0	Airline Rate Sheet	Soft	Rates from Airlines	until superseded	until superseded	delete
CXD 5.0	Customer Experience Files	Hard	Customer Experience Guidelines on charges to agents & clients, INCOTERMS, Tariff Processing Cost from Operation, Port charges, etc.	1 year	3 years	Shred
CXD 6.0	Quotation	Soft	Approved Sales proposal to client	until superseded	until superseded	delete
CXD 7.0	Key Performance Indicator	Soft	Key Performance indicator of Customer Experience	1 year	3 years	delete
CXD 8.0	Minutes of Meeting	Soft	Minutes of Meeting conducted on the 1st week of the month discussing KPI result of previous month	1 year	3 years	delete
CXD 9.0	Directory					
CXD 9.1	Client's Directory	Soft	List of company name, address, contact persons and contact numbers	until superseded	1 year	delete
CXD 9.2	Shipping Line & Consolidators directory	Soft	List of carriers and consolidator's contact details	until superseded	1 year	delete
CXD 10.0	Customer Portfolio	Soft	Standard Operating Procedures of accounts such as shipping, handling, & billing instruction. Copy of Government agencies permits needed such as BOC COR, SBMA, and other permit applicable per branch.	until superseded	until superseded	delete

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Please refer to printed files for signatures of approvers.

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