

# One Off Quote Suggested Process



Created /Last Edited Date	Last Edit Lading Associate	Version
Dec. 10 2018	K Kozlowski	1.2



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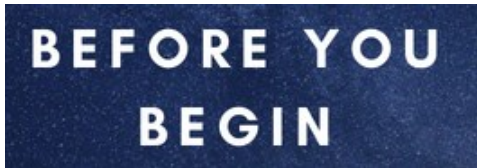
# 1 Introduction/Disclaimer

This process is a suggestion and may not match all/any suggestions found in WiseTech videos, or provided by the WiseTech help desk. This guide is meant to enhance and condense the WiseTech Global documentation - it is not intended to be comprehensive. Refer to the individual documentation and videos on the WiseTech page for complete information from WiseTech. It is not a comprehensive guide to the One Off Quote process within CargoWise.



Additional information is available in Lading Workshops, or in private sessions with your company – contact the Lading training department at [info@ladingcorporation.com/](mailto:info@ladingcorporation.com) to schedule your session.

## 1.1 Before you begin



The following Chapters are made based on the following assumptions – if any or all of these are not in place the steps described below may not work:

- 1) All Organizations are set to a company tariff level 1
- 2) Rates set at Tariff Level one (remember, client rates created will always supersede Company Tariffs)

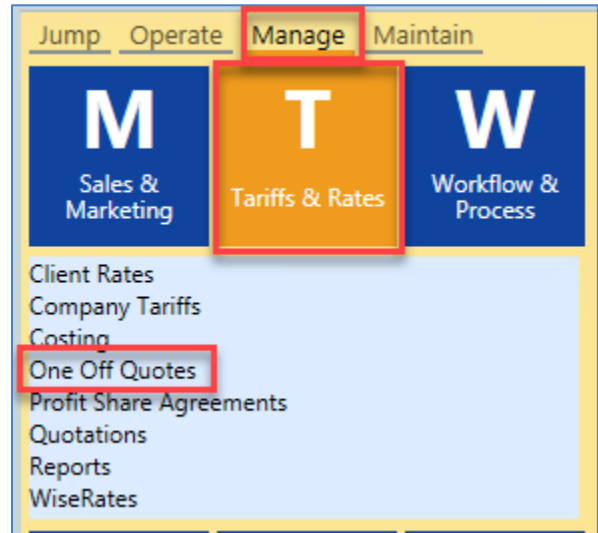
For information on creating company tariffs and/or setting all existing Organizations to level one, please contact your Lading representative



## 2 Search for the One-Off Quote

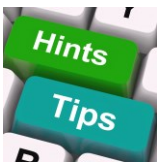
### 2.1 Accessing One Off Quotes

To access one Off Quotes, go to **Manage > Tariffs and Rates > One Off Quotes**



### 2.2 Search for Existing Quote

Using the search criteria at the top of the screen, search for an existing quote.



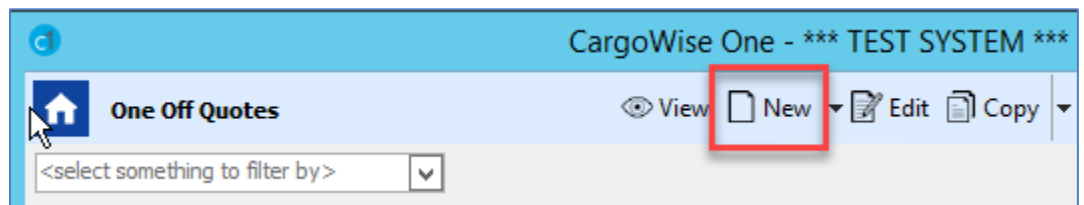
If a Shipment/Booking has already been created from a quote it will be noted in the Booking # field and start with an "S" (example S00001350)

Quote #	Booking #	Client	Client Name	Mode	Weight	UW	Volume	UV	Chargeable	Origin	Destination
00001030	S00001268	VERIMPJNB	THE VERY IMPORTANT COMPANY	LSE	100.000 KG		0.029 M3		100.000	ZAJNB	HKHKG
00001031	S00001271	BIGTREGGZ	BIG TREE TOYS	LCL	600.000 KG		5.663 M3		5.663	CAVAN	USMIA
00001034	S00001282	RICPICJAX	RICK'S PICKLES	FCL	600.000 KG		5.663 M3		5.663	USJAX	CNSHA
00001036	S00001349	SADCONMIL	SADA CONCERIA SPA	FCL	0.000 KG		0.000 M3		0.000		
00001037	S00001350	SADCONMIL	SADA CONCERIA SPA	FCL	0.000 KG		0.000 M3		0.000		
00001039		SHITESVAP	SHIPPER TEST 01	SEA	0.000 KG		0.000 M3		0.000	CLVAP	USMIA
00001040		INISOFAUS	INITECH SOFTWARE	LSE	200.000 KG		4.000 M3		666.667	USMIA	USCHI
00001041	S00001368	PREWOR_US	PRESTIGE WORLDWIDE	LSE	200.000 KG		12.000 M3		2,000.000	USJAX	MXMEX
00001042		DUNMIFSCR	DUNDER MIFFLIN PAPER	FCL	0.000 KG		0.000 M3		0.000	USPHL	PRSJU
00001043	S00001369	DUNMIFSCR	DUNDER MIFFLIN PAPER	FCL	0.000 KG		0.000 M3		0.000	USPHL	PRSJU
00001050		RICPICJAX	RICK'S PICKLES	LSE	462.000 KG		3.776 M3		629.333	USMIA	MXMEX
00001051		RICPICJAX	RICK'S PICKLES	LCL	462.000 KG		3.776 M3		3.776	USMIA	MXMEX

If quote already exists, **Go to step 3, Complete the Consolidation/Create the Shipment**

### 2.3 Create a new Quote

To create a quote, click the "New button" on the grid. The screen below will appear:



The following Information should always be entered (Other information can be entered if known):



New One Off Quote - \*\*\* TEST SYSTEM \*\*\* - Branch: Lading Corporation - Company: Lading Corporation - Department: Branch

File Edit Actions Quote Charges Documents Help

Details Custom Fields Document Selection Workflow & Tracking Quote Charges eDocs Notes Logs

**Client**  
 DUNMIFSCR [...]  
 Address Contact  
 1725 SLOUGH AVENUE  
 DUNDER MIFFLIN PAPER  
 1725 SLOUGH AVENUE  
 SCRANTON PA 18505 USSCR

**Shipper**  
 DUNMIFSCR [...]  
 Address Contact  
 1060 W ADDISON ST  
 DUNDER MIFFLIN PAPER  
 1060 W ADDISON ST  
 CHICAGO IL 60613

**Consignee**  
 [...]  
 Address Contact  
 \* NO ORGANIZATION IS SELECTED

Start Date 16-OCT-18 00:00  
 End Date 16-NOV-18 00:00

**2** Mode LSE [v] Air Freight (LSE) Is Domestic   
 INCO Term DDP [v] Delivered Duty Paid  
 Service Level [...]  
 {None Selected}

Origin USNYC [...]  
 Destination RUMOW [...]  
 Via [...]  
 Carrier [...]  
 Transit Time [v] Freq 0 [v]

**3** New York Moskva {None Selected} {None Selected}

**Goods Details**  
 Weight 240.000 KG [v]  
 Volume 0.300 M3 [v]  
 Chargeable 240.000 KG

**Goods Details**  
 Pic. Drop [v]  
 Div. Drop [v]  
 Commodity [...]  
 {None Selected}

**Monetary Values**  
 Goods Val 0.00 USD [...]  
 Ins Value 0.00 USD [...]

**Containers**  
 Count Cont Type

**Loose Cargo**

Count	Type	Weight	UW	Volume	UV	Length	Width	Height	UD
24	BOX	240.000	KG	0.300	M3	25.000	25.000	20.000	CM

**Brokerage Details**  
 Entries 1  
 Lines 1

Print Approve Convert to Booking with Quote Save Save & Close

## 1. Client

This will default to shipper as well – Consignee info can/should be entered if known

## 2. Mode & Inco Term

## 3. Origin/Destination

## 4. Weight/Volume

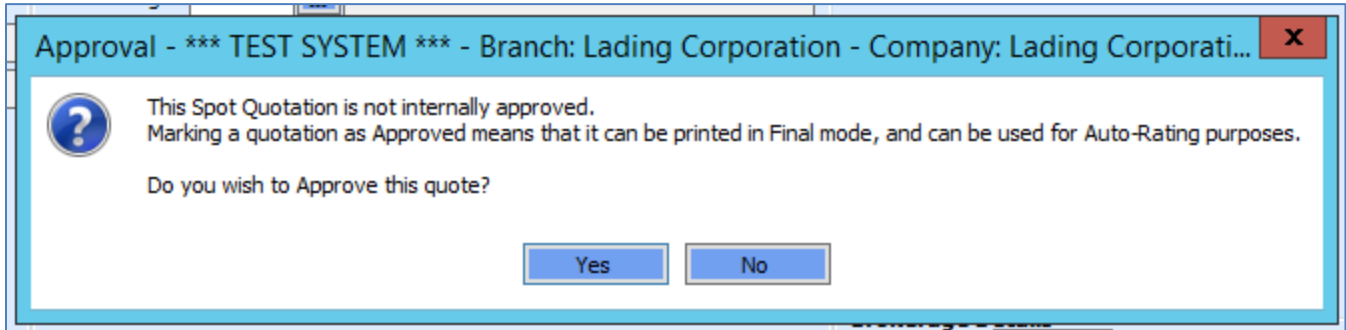
Can be entered in loose cargo if loose – will carry over to Goods Details

**SAVE**



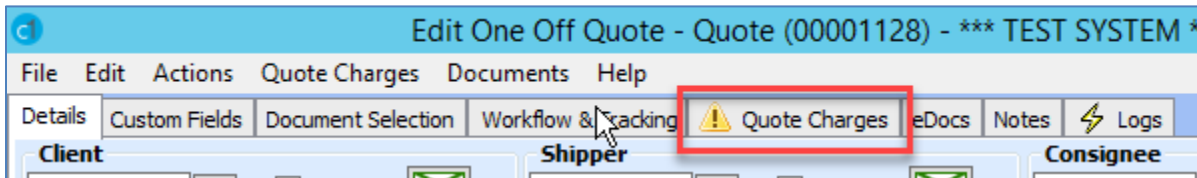
## 2.4 Approve Quote

If complete, you may approve quote, you may select "No" should you need to go back to quote to edit info later.

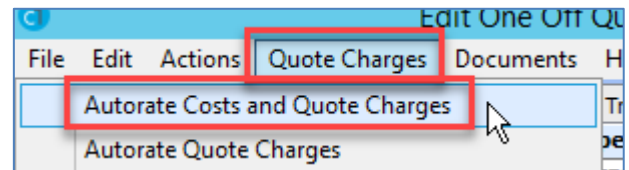


## 2.5 Autorate Quote

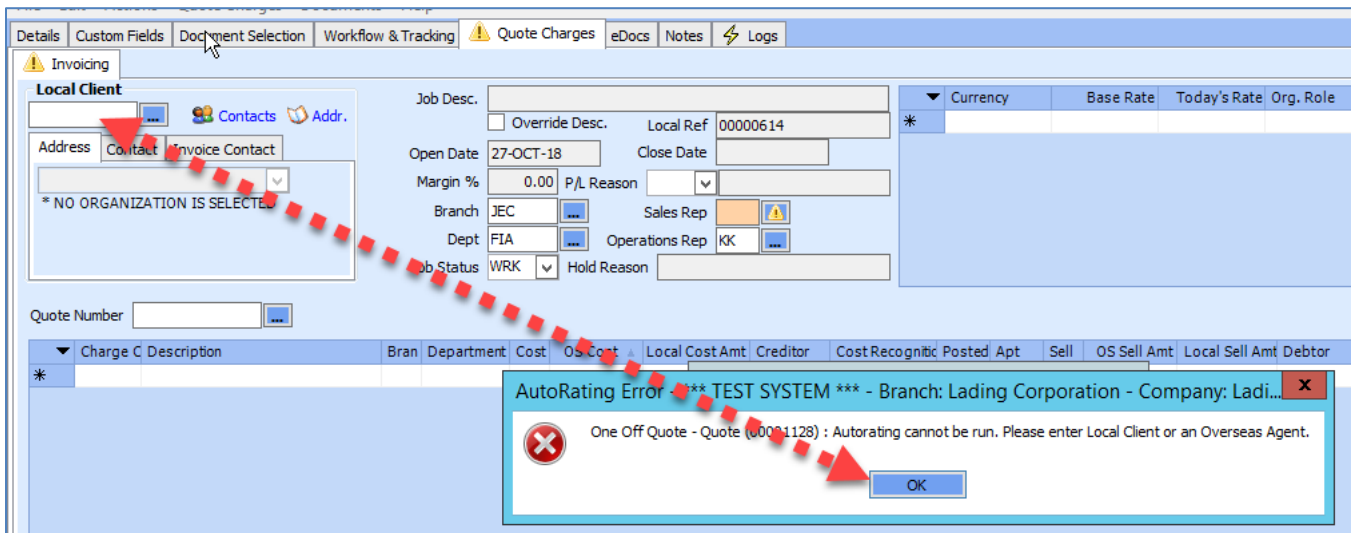
Go to the "Quote Charges" tab



Go to "Quote Charges" – then select "Autorate Quotes and Charges"



If not entered, select a local client, then re-autorate



## Enter Sell and Cost rates (If Known)



Charges should appear **with ZERO sell rates**– add Sell and Cost.  
If additional charges are needed – **ADD THEM**

File Edit Actions Quote Charges Documents Help

Details Custom Fields Document Selection Workflow & Tracking Quote Charges eDocs Notes Logs

Invoicing

**Local Client**

DUNMIFSCR

Address Contact Invoice Contact

1725 SLOUGH AVENUE  
DUNDER MIFFLIN PAPER  
1725 SLOUGH AVENUE SCRANTON PA 18505  
USSCR

Job Desc. [ ]  
Override Desc. [ ] Local Ref 00000614

Open Date 27-OCT-18 Close Date [ ]

Margin % 0.00 P/L Reason [ ]

Branch JEC Sales Rep RPO

Dept FIA Operations Rep KK

Job Status WRK Hold Reason [ ]

Currency	Base Rate	Today's Rate	Org. Role	Organization
*				

Quote Number [ ]

Charge C Description	Bran	Department	Cost	OS Cost	Local Cost Amt	Creditor	Cost Recognitc	Posted	Apt	Sell	OS Sell Amt	Local Sell Amt	Debtor	Sell Recognitc
FRT International Freight	JEC	FIA	USD	325.00	325.00	IMM				USD	325.00	325.00	DUNMIFS...	IMM
FSC Fuel Surcharge	JEC	FIA	USD	50.00	50.00	IMM				USD	50.00	50.00	DUNMIFS...	IMM
DOF Delivery OrderFee	JEC	FIA	USD	0.00	0.00	IMM				USD	0.00	0.00	DUNMIFS...	IMM
ONOTE Origin - Other Charges	JEC	FIA	USD	0.00	0.00	IMM				USD	0.00	0.00	DUNMIFS...	IMM

## SAVE

### Potential Issues – and how to fix them

#### No Local Client

If not entered, select a local client, then re-autorate

Details Custom Fields Document Selection Workflow & Tracking Quote Charges eDocs Notes Logs

Invoicing

**Local Client**

Address Contact Invoice Contact

\* NO ORGANIZATION IS SELECTED

Job Desc. [ ]  
Override Desc. [ ] Local Ref 00000614

Open Date 27-OCT-18 Close Date [ ]

Margin % 0.00 P/L Reason [ ]

Branch JEC Sales Rep [ ]

Dept FIA Operations Rep KK

Job Status WRK Hold Reason [ ]

Currency	Base Rate	Today's Rate	Org. Role	Organization
*				

Quote Number [ ]

Charge C Description	Bran	Department	Cost	OS Cost	Local Cost Amt	Creditor	Cost Recognitc	Posted	Apt	Sell	OS Sell Amt	Local Sell Amt	Debtor	Sell Recognitc
*														

AutoRating Error - \*\*\* TEST SYSTEM \*\*\* - Branch: Lading Corporation - Company: Ladi...  
One Off Quote - Quote (0001128) : Autorating cannot be run. Please enter Local Client or an Overseas Agent.

OK

### Not all charges show

Charges Codes are created to allocate revenue to tie to different sections for accounting based on the INCO Term – and depending on the INCO term selected not all charge codes may show.

Mode	FWL	Rail Freight (FWL)	Is Domestic
INCO Term	FCA	Free Carrier	
Service Level	CFR	Cost And Freight	
	CIF	Cost, Insurance And Freight	
	CIP	Carriage and Insurance Paid To	



A workaround is to change the INCO term to CIF, Autorate, then go back and change to whatever you'd like (rates will stay).

## 2.6 Consolidate

Once Saved, to create a new Shipment/Consol – click "Consolidate"

To add a shipment (Booking) to an existing consol – click "Add to Existing Consol" and find the consolidation

File	Edit	Actions	Quote Charges	Docur
Copy Hyperlink to Clipboard				
Copy ID to Clipboard				
Create Desktop Shortcut				
Copy Form to Clipboard				
Add to Favorites				
Reset Form Size and Layout to Default				
Make Inactive				
View Related Communications				
View Sales Relations				
Consolidate				
Add to Existing Consol				





## 3 Complete the Consolidation/Create the Shipment

The Booking will now appear as a shipment line in the Consolidation.

### 3.1 Complete information needed on the Consolidation record.

Shipment ID	Shipper Full Name	Consignee Full Name	Origin	Dest.	House Bill Number	Pa Type	Inners	Type	Weight	UW	Volume	UV	ETD	ETA	Shipper
S00001608	DUNDMIFSCR	DUNDMIFSCR	GBLON	USEWR		4 BOX	0 CTN		200.000	KG	0.906	M3			DUNDMIFSCR

When information is complete, click **SAVE**.

The Shipment and Consolidation are now both created.

Shipment ID	Shipper Full Name	Consignee Full Name	Origin	Dest.	House Bill Number	Pa Type	Inners	Type	Weight	UW	Volume	UV	ETD
S00001608	DUNDMIFSCR	DUNDMIFSCR	GBLON	USEWR		4 BOX	0 CTN		200.000	KG	0.906	M3	27-OCT-18...

