

# One Off Quote Suggested Process



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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**

The screenshot shows the CargoWise One navigation interface. At the top, there are four main tabs: 'Jump', 'Operate', 'Manage', and 'Maintain'. The 'Manage' tab is active. Below these tabs are three large buttons: 'M Sales & Marketing', 'T Tariffs & Rates', and 'W Workflow & Process'. The 'T Tariffs & Rates' button is highlighted with a red box. Below these buttons, there are two sections: 'Rates Service' and 'Tariffs & Rates'. The 'Tariffs & Rates' section contains a list of options: 'Client Rates', 'Company Tariffs', 'Costing', 'Intercompany Tariffs', 'One Off Quotes', 'Profit Share Agreements', 'Quotations', and 'Reports'. The 'One Off Quotes' option is highlighted with a red box.

### 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)

The screenshot shows the 'One Off Quotes' search results in CargoWise One. The table has the following columns: Quote #, Booking #, Client, Client Name, Mode, Weight, UW, Volume, UV, Chargeable, Origin, and Destination. The table contains 15 rows of data. The row with Quote # 00001037 and Booking # S00001350 is highlighted, indicating it is the selected quote.

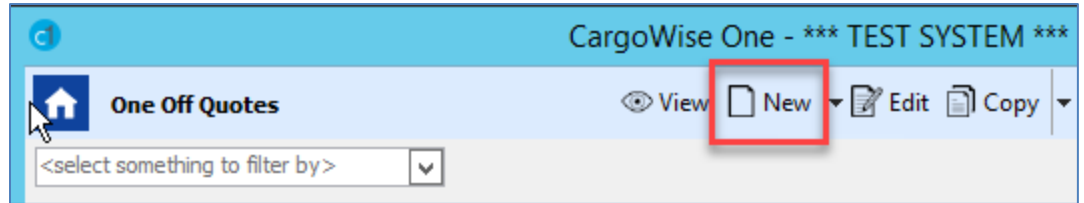
Quote #	Booking #	Client	Client Name	Mode	Weight	UW	Volume	UV	Chargeable	Origin	Destination
00001030	S00001268	VERIMPJNB	THE VERY IMPORTANT COMPANY	LSE	100.000	KG	0.029	M3	100.000	ZAJNB	HKHKG
00001031	S00001271	BIGTREGGZ	BIG TREE TOYS	LCL	600.000	KG	5.663	M3	5.663	CAVAN	USMIA
00001034	S00001282	RICPICJAX	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):

The screenshot shows the "New One Off Quote" form. The title bar indicates the branch is "Lading Corporation" and the company is "Lading Corporation". The form is divided into several sections:

- Client:** DUNMIFSCR, Address: 1725 SLOUGH AVENUE, DUNDER MIFFLIN PAPER, SCRANTON PA 18505 USSCR. A red "1" is next to the "Override" checkbox.
- Shipper:** DUNMIFSCR, Address: 1060 W ADDISON ST, DUNDER MIFFLIN PAPER, CHICAGO IL 60613. A red "1" is next to the "Override" checkbox.
- Consignee:** \* NO ORGANIZATION IS SELECTED.
- Mode:** LSE, Air Freight (LSE), Is Domestic: . A red "2" is next to the "Mode" dropdown.
- INCO Term:** DDP, Delivered Duty Paid.
- Service Level:** {None Selected}.
- Origin:** USNYC, New York. A red "3" is next to the "Origin" dropdown.
- Destination:** RUMOW, Moskva.
- Via:** {None Selected}.
- Carrier:** {None Selected}.
- Transit Time:** (empty), **Freq:** 0.
- Goods Details (left):** Weight: 240.000 KG, Volume: 0.300 M3, Chargeable: 240.000 KG.
- Goods Details (right):** Pic. Drop, Div. Drop, Commodity: {None Selected}.
- Monetary Values:** Goods Val: 0.00 USD, Ins Value: 0.00 USD.
- Containers:** A red "4" is next to the "Containers" section header. A table shows 24 BOX containers.
- Loose Cargo:** A table showing 24 BOX containers with weight 240.000 KG, volume 0.300 M3, length 25.000, width 25.000, and height 20.000 CM.
- Brokerage Details:** Entries: 1, Lines: 1.
- Buttons:** 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

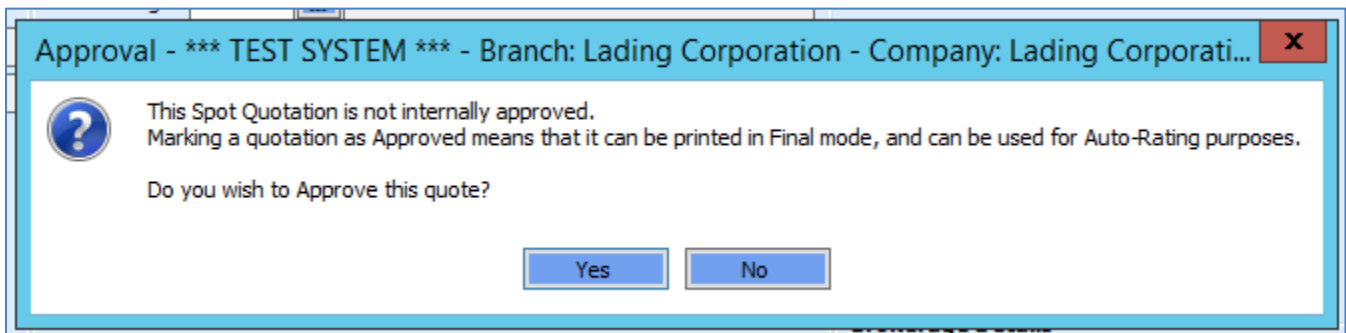
## 4. Weight/Volume

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

**SAVE**

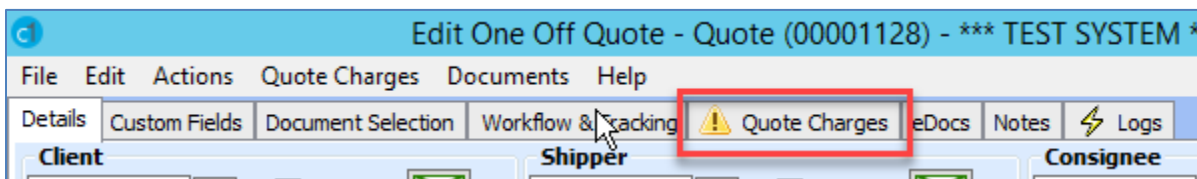
## 2.4 Approve Quote

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

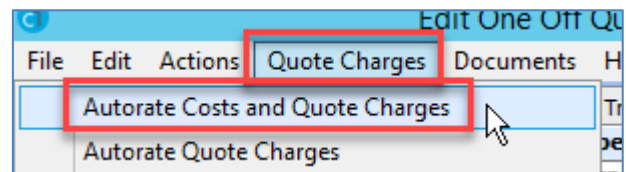


## 2.5 Autorate Quote

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



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

Invoicing

**Local Client**

Job Desc.  Currency  Base Rate  Today's Rate  Org. Role

Address  Contact  Invoice Contact

\* NO ORGANIZATION IS SELECTED

Open Date: 27-OCT-18 Local Ref: 00000614

Margin %: 0.00 P/L Reason:

Branch: JEC Sales Rep:

Dept: FIA Operations Rep: KK

Job Status: WRK Hold Reason:

Quote Number:

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

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

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

Open Date: 27-OCT-18 Local Ref: 00000614

Margin %: 0.00 P/L Reason:

Branch: JEC Sales Rep: RPO

Dept: FIA Operations Rep: KK

Job Status: WRK Hold Reason:

Quote Number:

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

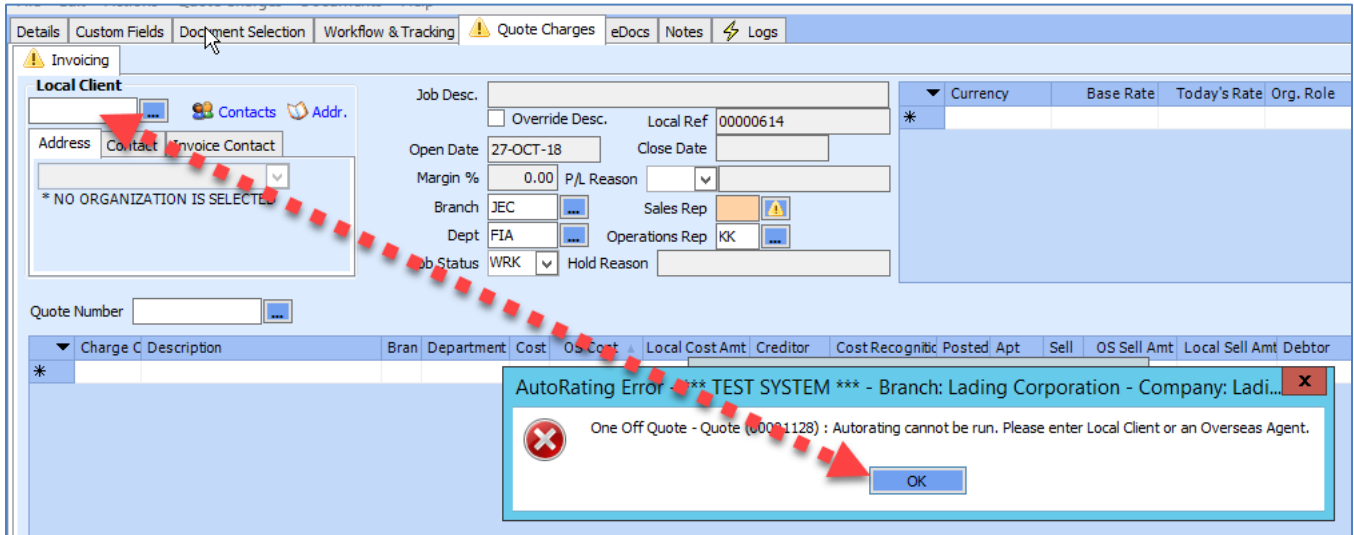
**SAVE**

## Potential Issues – and how to fix them

### No Local Client

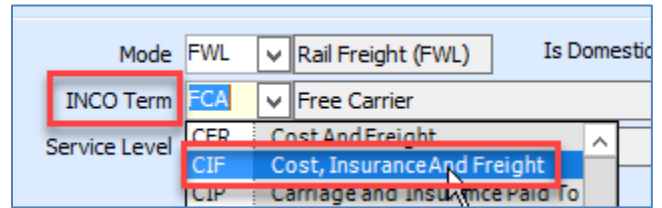
If not entered, select a local client, then re-autorate





### 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.

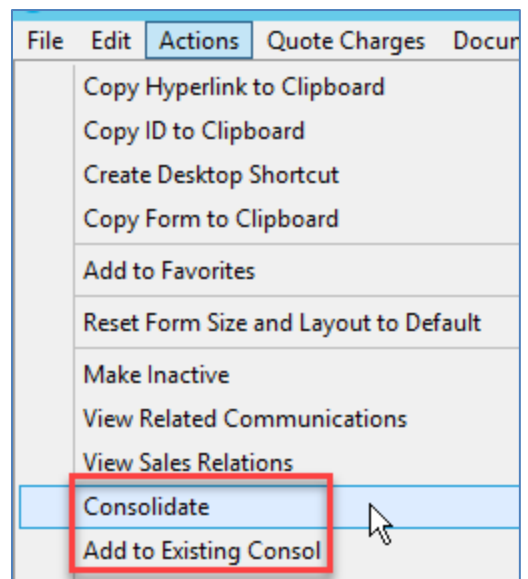


A workaround is to change the INCO term to CIF, Autorate, then go back and change to whatever you'd like (rates will stay).

### 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





### 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
*	DUNDR MIFFLIN PAPER		GBLON	USEWR		4 BOX	0 CTN		200.000 KG		0.906 M3				DUNMIFSCR

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	DUNDR MIFFLIN PAPER	GBLON	USEWR		4 BOX	0 CTN		200.000 KG		0.906 M3		27-OCT-18...

