

Spot Quote Process – Suggestion



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1 Introduction

This guide for Using One Off Quotes – is a SUGGESTION from the Lading Corporation, and is made after reviewing and is offers as an alternative to traditional use shown in 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.



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.

2 Search for/Create One Off Quote

2.1 Accessing One Off Quotes

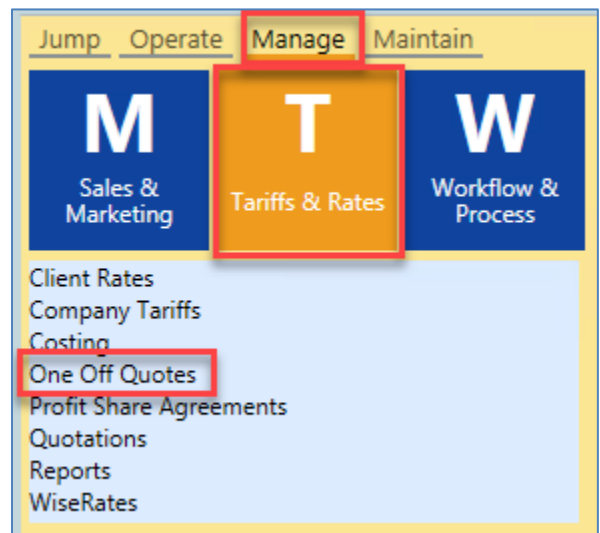
To access one Off Quotes, go to **Manage > Tariffs and Rates > One Off Quotes**

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)



CargoWise One - *** TEST SYSTEM *** - Branch: Lading Corporation - Company: Lading C

One Off Quotes View New Edit Copy Deactivate Actions Hide/Show Filters

<select something to filter by>

Help Manage Save Reset Group Find Clear Found 105 records

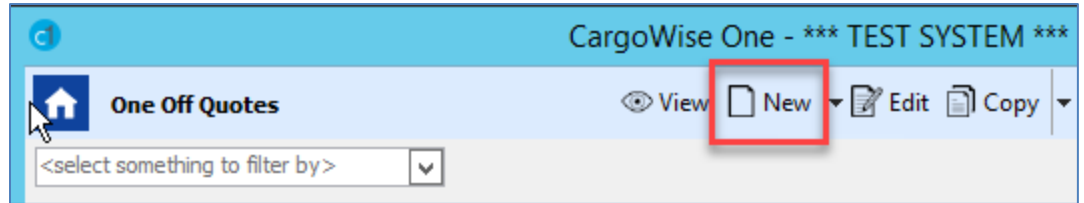
Quote #	Booking #	Client	Client Name	Mode	Weight	UW	Volume	UV	Chargeable	Origin	Destination
00001030	S00001268	VERIMPJNB	THE VERY IMPORTANT COMPANY	LSE	100.000	KG	0.029	M3	100.000	ZAJNB	HKHKG
00001031	S00001271	BIGTREGGZ	BIG TREE TOYS	LCL	600.000	KG	5.663	M3	5.663	CAVAN	USMIA
00001034	S00001282	RICPICJAX	RICK'S PICKLES	FCL	600.000	KG	5.663	M3	5.663	USJAX	CNSHA
00001036	S00001349	SADCONMIL	SADA CONCERTIA SPA	FCL	0.000	KG	0.000	M3	0.000		
00001037	S00001350	SADCONMIL	SADA CONCERTIA 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, Converting a Quote to a 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 in the CargoWise One system. The form is divided into several sections:

- Client:** Includes fields for Client ID (DUNMIFSCR), Address (1725 SLOUGH AVENUE), and Contact. A red number 1 is placed over the Client ID field.
- Shipper:** Includes fields for Shipper ID (DUNMIFSCR), Address (1060 W ADDISON ST), and Contact. A red number 2 is placed over the Shipper ID field.
- Consignee:** Includes fields for Consignee ID, Address, and Contact. A red number 3 is placed over the Consignee ID field.
- Mode & Inco Term:** Includes fields for Mode (LSE), Air Freight (LSE), Is Domestic, INCO Term (DDP), and Service Level.
- Origin/Destination:** Includes fields for Origin (USNYC), Destination (RUMOW), Via, Carrier, Transit Time, and Freq.
- Goods Details:** Includes fields for Weight (240.000 KG), Volume (0.300 M3), Chargeable (240.000 KG), Pic. Drop, Dlv. Drop, and Commodity.
- Monetary Values:** Includes fields for Goods Val (0.00 USD) and Ins Value (0.00 USD).
- Containers:** Includes a table for Containers with columns for Count, Cont Type, Weight, UW, Volume, UV, Length, Width, Height, and UD.
- Loose Cargo:** Includes a table for Loose Cargo with columns for Count, Type, Weight, UW, Volume, UV, Length, Width, Height, and UD.

At the bottom of the form, there are buttons for "Print", "Approve", "Convert to Booking with Quote", "Save", and "Save & Close".

Client

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

Mode & Inco Term

Origin/Destination

Weight/Volume

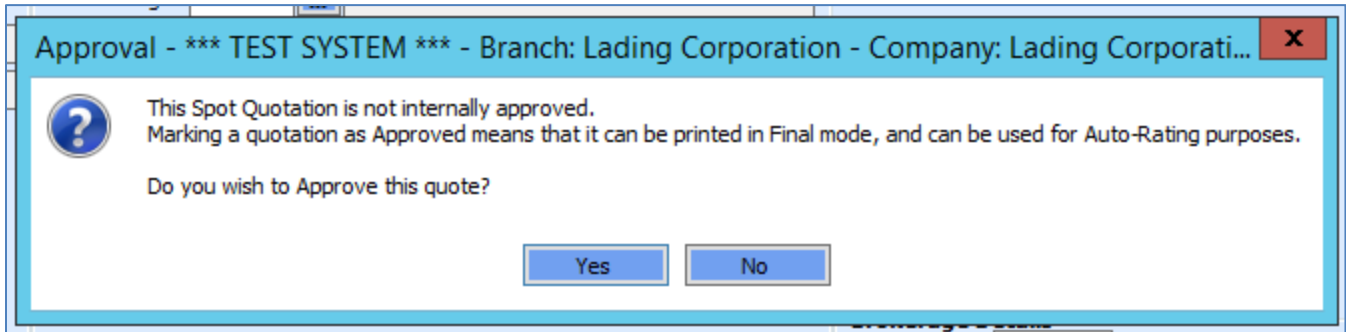
Can be entered in loose cargo if loose – will carry over to Goods Details

SAVE



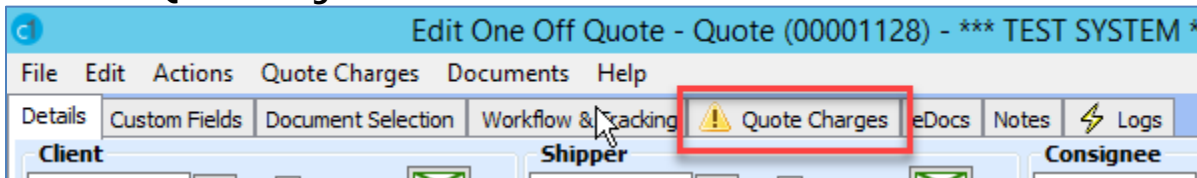
2.4 Approve Quote

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



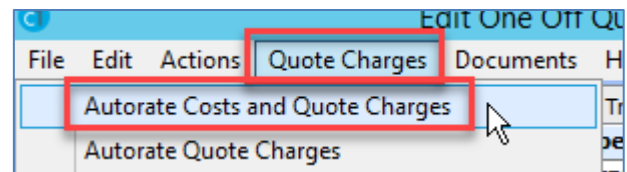
2.5 Autorate Quote

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 Recognitc 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)

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 Recognitc	Posted	Apt	Sell	OS Sell Amt	Local Sell Amt	Debtor	Sell Recognitio
FRT International Freight	JEC	FIA	USD	325.00	325.00		IMM	<input type="checkbox"/>	<input type="checkbox"/>	USD	325.00	325.00	DUNMIFS...	IMM
FSC Fuel Surcharge	JEC	FIA	USD	50.00	50.00		IMM	<input type="checkbox"/>	<input type="checkbox"/>	USD	50.00	50.00	DUNMIFS...	IMM
DOF Delivery Order Fee	JEC	FIA	USD	0.00	0.00		IMM	<input type="checkbox"/>	<input type="checkbox"/>	USD	0.00	0.00	DUNMIFS...	IMM
ONOTE Origin - Other Charges	JEC	FIA	USD	0.00	0.00		IMM	<input type="checkbox"/>	<input type="checkbox"/>	USD	0.00	0.00	DUNMIFS...	IMM

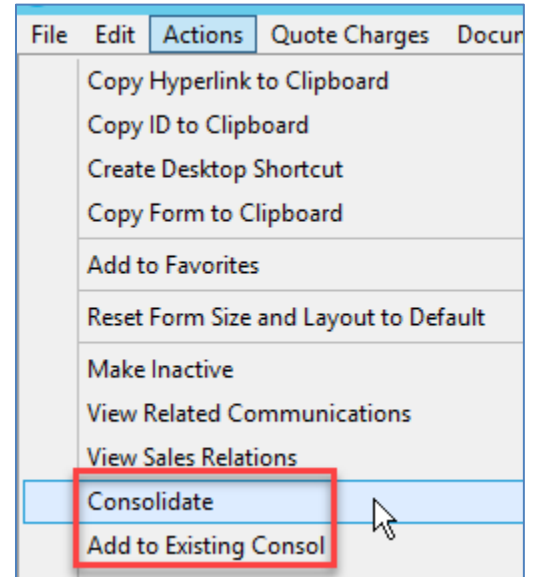
SAVE



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.

New Consol - *** TEST SYSTEM *** - Branch: Lading Corporation - Company: Lading Corporation - Department: Branch

File Edit Actions Electronic Messaging Documents Forms Job Invoicing Help

Details Routing Containers Packing Workflow & Tracking AWB Electronic Messaging AR and AP Invoices Consol Profit/Loss Consol Costing Doc Data Addresses eDocs Notes Logs

Consol Details

Type AGT Agent Transport AIR Air Freight Container Mode LSE

Domestic 1st Load GBLON Last Disc USEWR Phase ALL

Flight

Flight Aircraft Type Aircraft Reg.

Load Port GBLON ETD ATD

Discharge USEWR ETA ATA

Is Domestic Is Linked Is Charter Is Cargo Only

Svc. Lvl. STD Standard MAWB Neutral MAWB

Payment CRN: Scr. NOT

Organizations Departure Arrival Docs Achieved Quantities Numbers Additional Detail Port Transport

Sending Agent {None Selected}

Receiving Agent LADINGJEC Lading Corporation 30 MONTGOMERY ST

Carrier {None Selected}

Creditor {None Selected}

Carrier Bkg. Ref Agents Reference

Verification/Pre-Allocation

Shipments 0 Weight 0.000 Volume 0.000

Chargeable 0.000 Cut Off Date

Shipment ID	Shipper Full Name	Consignee Full Name	Origin	Dest.	House Bill Number	Pa Type	Inners	Type	Weight	UW	Volume	UV	ETD	ETA	Shipper
*	DUNDER 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.

Edit Consol C00001302 - *** TEST SYSTEM *** - Branch: Lading Corporation - Company: Lading Corporation - Dep

File Edit Actions Electronic Messaging Documents Forms Job Invoicing Help

Details Routing Containers Packing Workflow & Tracking AWB Electronic Messaging AR and AP Invoices Consol Profit/Loss Consol Costing Doc Data Addresses eDocs Notes Logs

Consol Details

Type AGT Agent Transport AIR Air Freight Container Mode LSE

Domestic 1st Load GBLON Last Disc USEWR Phase ALL

Flight

Flight UA123 Aircraft Type Aircraft Reg.

Load Port GBLON ETD 27-OCT-18 12:25 ATD

Discharge USEWR ETA 28-OCT-18 12:25 ATA

Is Domestic Is Linked Is Charter Is Cargo Only

Svc. Lvl. STD Standard MAWB 016- 22222211 Neutral MAWB

Payment CRN: Scr. UNK

Organizations Departure Arrival Docs Achieved Quantities Numbers Additional Deta

Sending Agent {None Selected}

Receiving Agent LADINGJEC Lading Corporation 30 MONTGOMERY ST

Carrier UNIAIRMDW UNITED AIRLINES 25 N MICHIGAN AVE

Creditor {None Selected}

Carrier Bkg. Ref Agents Reference

Verification/Pre-Allocation

Shipments 0 Weight 0.000 Volume 0.000

Chargeable 0.000 Cut Off Date

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

