



CARGOWISE QUOTING GUIDE

WHITE PAPER

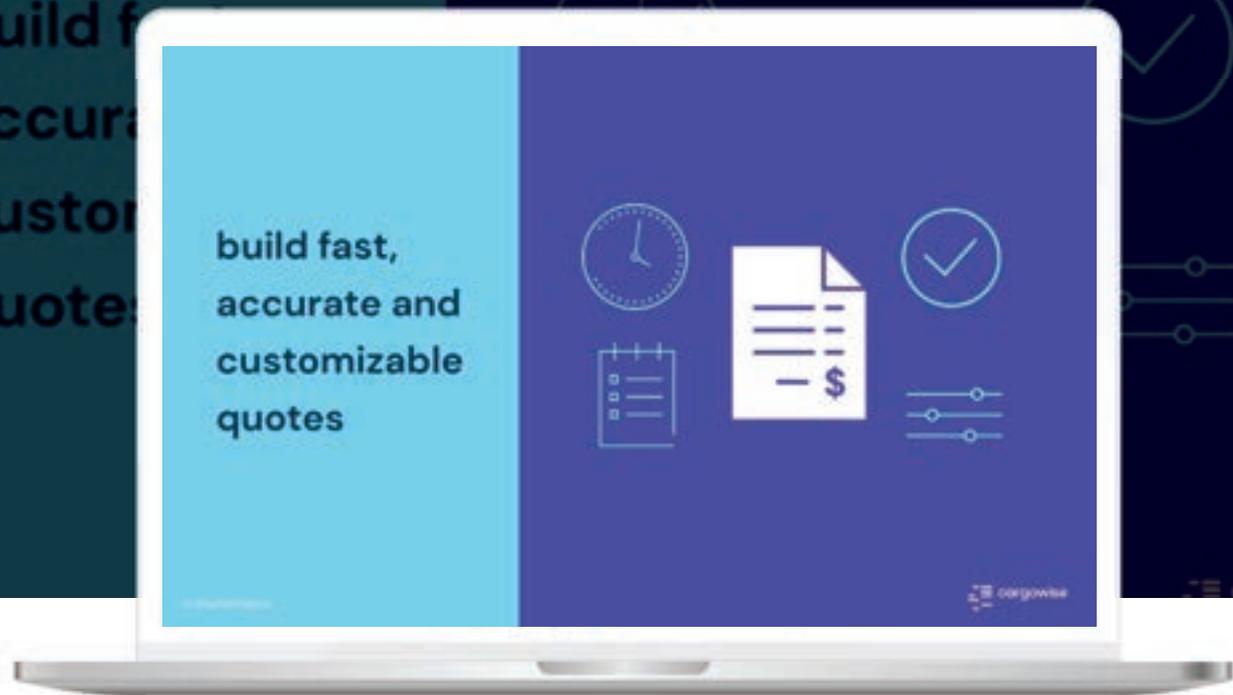
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LOGIXBOARD

A training tool for freight forwarders and freight brokers to utilize the CargoWise Quotations and One Off Quotes modules to deliver quick and accurate quotes to customers.



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Summary

For many freight forwarders, the CargoWise One platform is integral to managing data, collaborating with stakeholders, and incorporating automation and technology into their day-to-day tasks. As logistics professionals aim to increase efficiency and expand their business, CargoWise enables them to scale and streamline their operations.

One key way in which CargoWise drives productivity for forwarders is through its quoting features. Under the Manage module, CargoWise users can access the Quotations and One Off Quotes features to create and send quotes directly through the platform. Using these features, forwarders can seamlessly deliver contract and spot rates to current and prospective customers.

By leveraging the CargoWise quoting features, your team can respond to requests for quote (RFQs) with greater speed and accuracy. By managing rates, quoting, and booking from the same platform, you can also minimize the cost of data transfer and loss of documents.

Introduction to CargoWise Quotations

The CargoWise Quotations feature is a tool used to create quotes for multiple movements of cargo with matching criteria. For instance, a forwarder can use Quotations to send a client a document that outlines the respective rates they'll charge to transport various types of containers.

Forwarding Standard Pricing Page			Page 1 of 2
Air Freight from Los Angeles to Heathrow Apt/London			
Quote No:	1063 - US1IMPLAX	Validity:	15-Aug-21 - 15-Sep-21
Frequency:	Not Specified	Transit Time:	Not Specified
Service Level:	Not Specified	Airline:	BRITISH AIRWAYS
Commodity:	GEN - General		
US 1 IMPORTER/EXPORTER CORPORATION			
Air Freight from Los Angeles to Heathrow Apt/London			
	Currency	Rate	
International Freight			
Minimum	USD	85.00	
Less than 45 KG	USD	3.50 per KG / 8000 CC	
45 KG to less than 100 KG	USD	3.50 per KG / 8000 CC	
100 KG to less than 250 KG	USD	2.00 per KG / 8000 CC	
250 KG to less than 500 KG	USD	1.95 per KG / 8000 CC	
500 KG to less than 1000 KG	USD	1.90 per KG / 8000 CC	
1000 KG and above	USD	1.85 per KG / 8000 CC	

The CargoWise Quotation Feature

CargoWise Quotations enables users to construct a document with rates for various services over a given amount of time. To understand how to use this feature, you'll need to be familiar with its three main components.

In the **Rate Entries grid**, users can list details for multiple modes of transport, as well as add other areas in which to apply rates. Below that, in the **Rate Lines and Items grid**, users can add charges to apply to jobs matching specific parameters. Each item in the Rates Line and Items grid connects to the **Calculator**, where users can specify how to calculate each charge based on the rate structure.

The screenshot displays the CargoWise Quotation interface with three key components highlighted:

- Rate Entries grid:** Located at the top, it shows a table with columns for Origin, Destination, Commodity Code, and other details.
- Rate Lines and Items grid:** Located in the middle, it shows a table with columns for Description, Line Description, Currency, and other details.
- Calculator:** Located on the right side, it shows a table with columns for Description, Rate, and other details.

How to Create a Quotation

To get to the CargoWise Quotation feature, open up CargoWise and navigate to **Manage > Tariffs & Rates > Quotations**.

Select the **New** button on the page header to open the **Edit Quotation** window. Under the **Client** field, enter or select the company you want to quote.

HINT: If you don't know the code to enter in a given field, click the search tile to find it using filters.

Specify the validity period by updating the **Start Date** and **Expiry Date** fields. This will provide a time frame during which the rates listed will apply. Once a quote expires, you can create a new one with updated rates.

When creating a quote, select the tab for which the costs will apply:

- Forwarding
- Liner & Agency
- CFS
- Warehouse
- Transport

Add a line to the **Rate Entries grid** for each trade lane.

Feel free to add as many trade lanes as you want to include on the quote. Repeat the process on each tab that you're calculating rates for:

- Air Freight
- LCL Freight
- LCL/FTL/LTL Freight
- Origin Charges
- Destination Charges

NOTE: Fill in only the fields that relate directly to the rate. For example, if the rate is specific to a mode of transport, ensure that you fill in the Mode field. Completing unnecessary fields may lead to roadblocks when using the autorating tool.

In the **Rate Lines and Items grid**, add a new line for each charge by filling in the **Charge Code** field. Based on your selection, the **Description** and **Local Description** fields will autofill.

NOTE: Click the Summary tab to view all of your entered rates in one place.

For each charge you've entered, fill in the calculator with the correct rates and pricing structure. CargoWise will automatically select a calculator based on the charge code, but feel free to change the selection if necessary.

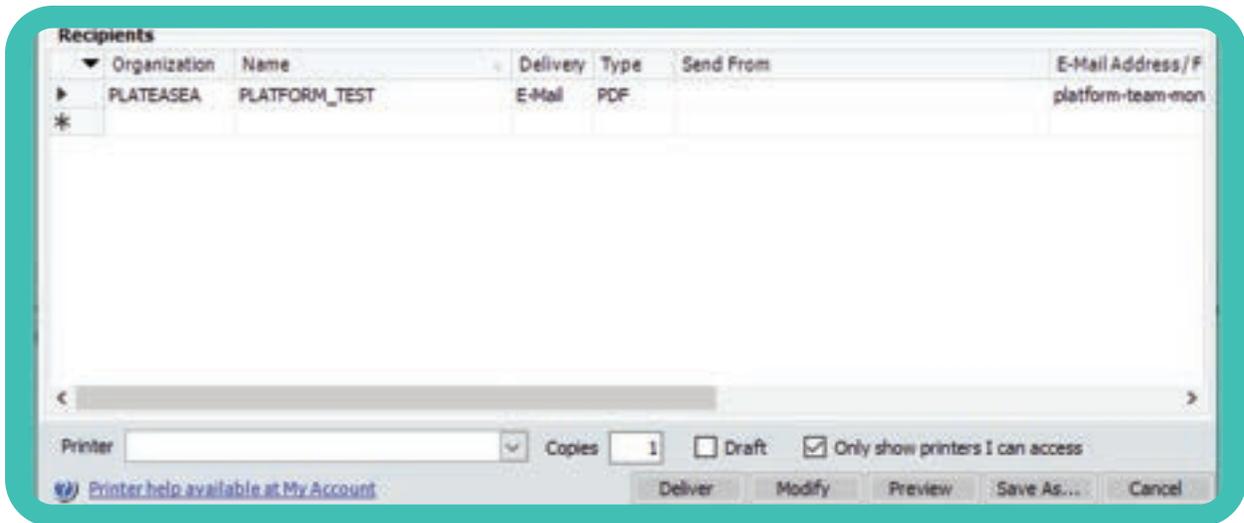
Quick guide to calculators in CargoWise

- **Flat Calculator (FLT):** Includes a single base rate, regardless of the number of units
- **Unit Calculator (UNT):** Calculates a charge based on the number of units, multiplied by the Per Unit Price
- **Minimum Calculator (MIN):** Used in combination with another calculator; applies a minimum charge on a “per Job” or “per Charge Code” basis
- **Minimum or Per Unit Calculator (MPU):** Calculates a charge based on the number of units, or replaces it with a set minimum
- **Flat plus Per Unit Calculator (FPU):** Calculates a charge based on a set flat rate, plus the number of units multiplied by the Per Unit Price
- **Sliding or Per Unit with Base, Minimum, Maximum Calculator:** Calculates a charge based on the break rate, multiplied by the weight or number of units within that range

Saving/Sending a Quotation

When a quotation is completed, you can save it and mark it as Approved. Upon saving a quotation, CargoWise will automatically send out a Quotation Reminder. A Quotation Reminder is a follow-up message that will be sent to the quotation creator and the assigned sales representative, provided both of their emails are in the system. The email will contain a calendar invitation reminding the creator to follow up, based on the date in the **Follow Up Date** field.

Once you've reviewed your quotation for accuracy, you can go ahead and send it to your customer. To begin the process of delivering your quotation, select the **Print** button at the bottom-left side of the screen.



After opening the **Deliver Documents window**, the user can fill in the delivery information in the Destination, including the recipient's name, delivery method, and sender/recipient addresses. They can also navigate to the **Documents to Send** tab to select pages to include, or the **Cover Note** tab to enter additional text.

Once the user clicks the Deliver button, the quotation will be sent to the specified recipient(s). The quotation's status will also be updated to Finalized in the CargoWise system, and it will no longer be available for editing.

After your customer accepts the quotation, you can go back into CargoWise to mark it as Accepted. Once the quotation is accepted and finalized, it will apply to future jobs when using the autorating feature.

Introduction to CargoWise One Off Quotes

CargoWise One Off Quotes are quotations that apply to a single movement of cargo based on specified details from the customer. While the Quotations feature enables users to create contracts or rate sheets, One Off Quotes help produce spot quotes.

While quotations are often valid for roughly a month by default, spot quotes will generally last for a week at most. It's difficult to predict what rates will look like a week from today, let alone an entire month down the road. Therefore, during times in which the market is volatile and rates are unstable, the logistics industry tends to shift toward one off quotes.

THE CARGOWISE ONE OFF QUOTES FEATURE

CargoWise One Off Quotes allows users to generate a one-time quote using the information they have on a potential shipment. As such, creating a spot quote consists of entering in the details you have on hand, including the parties involved, the mode of transport, and cargo dimensions.

Once you enter all of the information you've received from your shipper's RFQ, you can add rates and charges to produce a document with a quote to send back.

HOW TO CREATE A ONE OFF QUOTE

To access the CargoWise One Off Quote feature, open up CargoWise and navigate to **Manage > Tariffs & Rates > One Off Quote**.

Select the **New** button to create a new One Off Quote. On the window that opens, enter the organization code for the client you're quoting in the **Client** field. The **Shipper** and **Consignee** fields may fill in based on your client selection, but click in to edit either if necessary. Review the contact information for each party selected and update as needed.

Set a validity period using the **Start Date** and **End Date** fields. After that, fill in the rest of the form based on how much information you have from the shipper.

Go to the **Quote Charges** tab to set rates for your one off quote. You can either do this by adding quote charges manually, or by pulling rates from your system with the autorating tool (**Quote Charges > Autorate Quote Charges**).

Benefits of Quoting in CargoWise

Especially when sending quotes in small batches, it can be tempting to create them manually as spreadsheets or emails to avoid the initial learning curve of using a digital solution. However, by managing the quoting process in CargoWise, you can establish a robust system to handle your operations as they scale.

Creating a quotation or one off quote in CargoWise enables you to leverage the data you have in the system to maximize speed and accuracy. Through the filters, you can search for codes and names as needed without leaving the system. The standardized creation form also provides a consistent template to ensure you're including all of the necessary information.

Once you've created and saved a quote, it's now integrated into your system. When you need to access it, it can be easily located in its respective feature area through filtering by a field like the

Client Name or Quote Number. Additionally, using CargoWise to build your quotes enables you to leverage automated features like autorating to update rates and standards system-wide and reduce miscommunication.

Another key benefit of quoting in CargoWise is that it allows forwarders to deliver timely client communications, thereby improving customer experience and establishing an advantage over slower competitors. By enabling users to produce bookings and documents directly from quotes in the system, CargoWise's quoting process helps build an organized file system while eliminating the need for manual data transfer.

The Quotation and One Off Quote features are crucial in streamlining the quoting process for CargoWise users. Not only does this improve efficiency internally, but it also helps forwarders generate new business and retain existing customers.

FAQs About CargoWise Quoting Processes

Can I create the same quotation for multiple clients?

While you can't assign a quote to multiple clients upon creation, you can copy an existing quote and assign it to a new client. To do so, start at the Quotations module, right-click into the quote you want to copy, and click Copy > For New Client. You can do the same in the One Off Quotes module by right-clicking the correct line, then clicking Copy > Copy.

How can I edit a quote after it's been delivered?

When you deliver a quote (in Quotations or One Off Quotes), its status will be marked as Finalized. This means it will no longer be able to be edited, aside from the validity period. However, you can create a copy to make edits and resend. The copied quote will have the same number as the original, followed by "/A" (or the next character in the alphabet for multiple copies).

Can my customer accept a quote after it's expired?

Once a quote expires, it can no longer be accepted. However, you can copy the quote using the process described above and resend it to the customer.

