Quotation Module Frequently Asked Questions (FAQ)

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| Question | How do I get access to the Quotation Module? |
| Answer | Email your request to support@crowley.com |
| Question | **What do I do to get access removed for an employee?** |
| Answer | Email your request to support@crowley.com |
| Question | **Do customers have access to obtain an open tariff quote?** |
| Answer | Send an email to the Liner Transformation Team as it is a requirement of the FMC to allow public access to all open tariff rates. |
| Question | **How do I view the Rules text for each tariff?** |
| Answer | View all rules at <http://www.crowley.com/What-We-Do/Shipping-and-Logistics/Tariff-Rules-and-Rates/Liner-Tariff-Pages/Liner-Tariff-Rules-and-Rates> |
| Question | **If the move took place prior to June 14th when the new open tariff rate went into effect, what do I do?** |
| Answer | Use the BOTE system to access any rates prior to June 14th. Any cargo movement after June 14th should be rated/quoted in the new Quotation module. |
| Question | **Are there shortcuts to typing out the load/discharge ports?** |
| Answer | Yes. The system utilizes the UNLOC codes. You can begin typing the location and the system will recognize the location or you can type the 5-digit code and the system will populate with the name. (ex: USPEF) |
| Question | **What is the difference between the Quotation Reference Number and the Quotation Number?** |
| Answer | The Quotation Reference Number is the unique destination provided to the quote and is the number provided to the customer. The Quotation Number is the reference to the database ID and is used by the system only. |
| Question | **What do I do when a customer requests a lower rate?** |
| Answer | Insert notes in the Communication field identifying the issue. Email your pricing contact with the Quotation Reference Number. |
| Question | **Who do I contact with technical questions?** |
| Answer | Email Support@crowley.com describing the details, the steps you took and what is expected. |
| Question | **How do I view my quotes?** |
| Answer | * On the Home Page, select ADVANCED SEARCH
* Select the Arrow and the search screen will populate
* Select the dropdown arrow to select CREATION USER
* Type in your User ID (ex: macdowe) and select Enter
* A list of your quotes will appear

NOTE: If you see quotes listed under a different ID, those are quotes you created but another user modified. |
| Question | **How do I save my search?** |
| Answer | * Select ADD QUERY button to save a search
* Enter the name you want to save the under (ex: Wendy’s Quotes)
* Select Save then Close

NOTE: This query will be listed on your Home Page under My Queries. You can add as many search queries as you would like. Each time you select a query name, the data will refresh. |
| Question | **How do I change the view of the columns in the ADVANCED SEARCH?** |
| Answer | * Select the Columns button to see a list of fields in the current view
* To remove a column from the Visible list, select the Eye icon next to the name of the column
* To add a column, click on the column under all columns. The Eye icon will highlight.
* To change the order of columns, drag and drop the column order in the table
* To lock the columns when scrolling, select the Pin icon
 |
| Question | **What is the difference between My Queries and My Reports on the Home Page?** |
| Answer | My Queries shows all the User’s saved searches.My Reports shows all Quote Confirmations the user has created.  |
| Question | **How do I see all Users’ Quote confirmations?** |
| Answer | Select My Reports. A new tab, Report Creation Overview, will populateFilter to view All Reports |
| Question | **What type of searches can I perform on the Remarks and Reference fields?** |
| Answer | General Data Remark, Cargo Information Remark and Customer Reference |
| Question | **What dates should I be entering?** |
| Answer | * Enter 30 days from the request date in the Ready Date field for all quotes to ensure the quote is valid for 30 days
* Enter the date the cargo was received in the Ready Date field for the Bill of Lading

NOTE: Only use the Ready Date field. Disregard the Validity To/From date |
| Question | **Can I backdate the ready date?** |
| Answer | Yes, the system allows you to backdate |
| Question | **How do I quote an inland rate?** |
| Answer | * Go to COS to determine the inland rate. To add this amount into the quote, click on the Calculation Rule link
* Click Append at End to add the inland charge
* In the first dropdown, choose your Charge Code (INLD or INLP)
* Click the dropdown and choose the “+” to indicate an addition to the rates
* Choose your currency as USD
* Type in your rate
* In the dropdown choose “C” for per Container
* Click the Save button

NOTE: Inland rates will be added into the system in a future release. |
| Question | **Where do I put the inland location since the Quotation module currently shows port to port rates?** |
| Answer | * Add the inland location and mode in the Remark field on the General Date tab
* To share this information with the customer, add the information in the Communications area
 |
| Question | **What do I put in the TLI field in DC31?** |
| Answer | Enter the Quote Reference Number in the TLI field in DC31 |
| Question | **What do I do if I receive an error and I do not receive a routing/rate?** |
| Answer | * If you receive the following error: It was not possible to find any routes automatically. Special quotation needs to be created, check the port pairs and equipment type to ensure this is a service we offer.
* If we offer the service, send an email to tariffadmin@crowley.com
 |
| Question | **What do I do if the customer is not listed in the Customer dropdown?** |
| Answer | * If the Company name is not listed in the dropdown, choose the company name Unregistered Company
* Add the Company Name and Contact Name under New Message on the Communication tab and select Share with Customers as type
 |
| Question | **If the person who is asking for the quote is not the contact name populate when I choose CVIF, what do I do?** |
| Answer | Add the customer’s name in the Communications area of the quoteNOTE: If you add the customer’s name in the Customer Contact field, you will receive an error when you select Next |
| Question | **How do I view surcharges?** |
| Answer | Select the Contribution link |
| Question | **How do I view the charge code description?** |
| Answer | Click Calculation Rule link |
| Question | **Can I quote two different moves on the same quote?** |
| Answer | Yes, if the origin, destination and cargo type are the same. The quote can have two different commodities. |
| Question | **What do I do if the customer wants to add another equipment type to their confirmed quote?** |
| Answer | * Click on the Cargo Information tab
* Click Add Item button and add the new equipment type
* Select Next and the new rate will generate
 |
| Question | **How do I change the port/equipment type if I already selected it?** |
| Answer | * Click on the General Data tab
* Update the port information and select Next
* On the Cargo Information tab, update the equipment type and select Next until you reach the Summary page

NOTE: You must select Next until you reach the Summary page when updating information to ensure the quote is rated with the updated information. |
| Question | **How do I attach documents to a quote?** |
| Answer | * Click on Documents link
* Click Choose a File
* Attach appropriate documents

NOTE: You *cannot* send document to customers which are attached to a quote. This function is for storage only. |
| Question | **How do I add/delete charges to a quote?** |
| Answer | * Edit charges using the Calculation Rule link
* To add a rate, click on Append at End button
* Select appropriate charge code
* To add or remove charges, select “+/-“ button
* Enter currency of USD
* Input the amount and “per” code (ex: C for Per Container)
* Click Save

NOTE: All fees can be viewed on the Contribution link. |
| Question | **How do I quote hazardous cargo?** |
| Answer | * On the Cargo Information tab, click IMDG box
* The IMDG section will appear to add the UN Number, Technical Description, if known, and the IMDG Class. If Technical Description is not known, enter TBD
* If there is more than one hazardous material for the shipment, click Add IMDG Details to add each additional one
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| Question | **How do I quote an empty SOL trailer?** |
| Answer | Click the Empty box on the Cargo Information tab |
| Question | **How do I add clauses to a quote?** |
| Answer | * If the quote is completed, click on the Clauses link
* Click the Add Clause button to see a dropdown of all available standard clauses
* Click the appropriate clause
* The clause text next to the Clause ID will populate
* Continue to add as needed

NOTE: The quote confirmation will print previously identified standard clause remarks as those input on BOTE quotes. The clauses will print on the quote confirmation. |
| Question | **Where do I add additional information that is not reflected in the clauses?** |
| Answer | * Click on the Communication link
* Type the additional information and select Share with Customer

NOTE: Selecting Share with Customer will allow the text to be printed on the quote confirmation. |
| Question | **How do I send the quote confirmation to the customer?** |
| Answer | * On the Summary Page, click on the Create Quotation Confirmation button to generate a quote confirmation
* Click on Open Web Reporting Center
* The list of all your generated quotations will populate
* Select the quote you want to send to the customer
* Select the download icon to the right
* The confirmation will populate in a new window
* Save the confirmation in your files and email to the client as an attachment
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| Question | **How do I add comments to the quote which will print on the confirmation page?** |
| Answer | * All Remark Sections will print on the quote confirmation
* To add additional remarks, select the Communication link
* In New Message, type in additional remarks
* Select Share with Customer for remarks to print on quote confirmation
* Select Save

NOTE: Once comments are saved, they cannot be deleted. |
| Question | **What is the difference between Internal and External Comments?** |
| Answer | * Internal comments (Comment Internally) will not print on the quote confirmation and are intended to for internal purposes only
* External Comments (Share with Customer) will print on quote confirmation
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