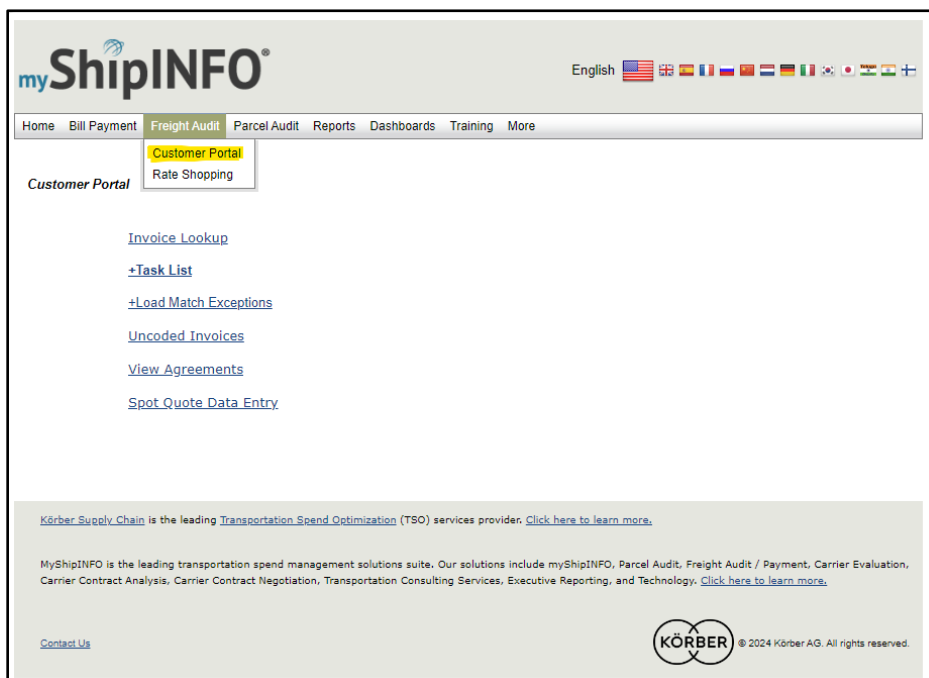# Spot Quote Functionality SOP

Freight Audit

OVERVIEW

The Spot Quote tool in MSI is a function that enables customers to enter spot quotes directly into MSI. Entering spot quotes into MSI will allow for non-contracted volume to be audited based on the agreed upon rates that are loaded into the system. Customers can enter "one-off" spot quotes, upload a spreadsheet with multiple spot quotes, and can upload multiple spot quotes across different carrier bases at the same time. All three processes are outlined below.

Before you begin using this process, the carrier must be configured to accept spot quote rating. If you are unsure if this configuration is set up, please reach out to your freight auditor or clientservices-env@koerber-supplychain.com
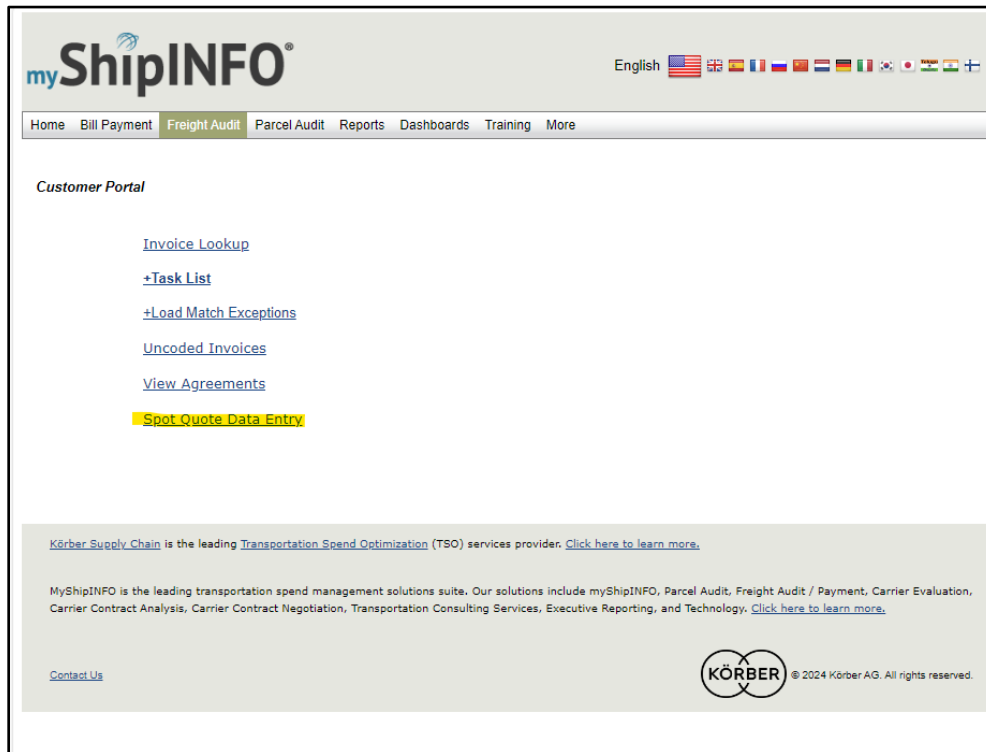
Navigating to the Spot Quote screen

- Login to MSI and find the "Freight Audit" tab
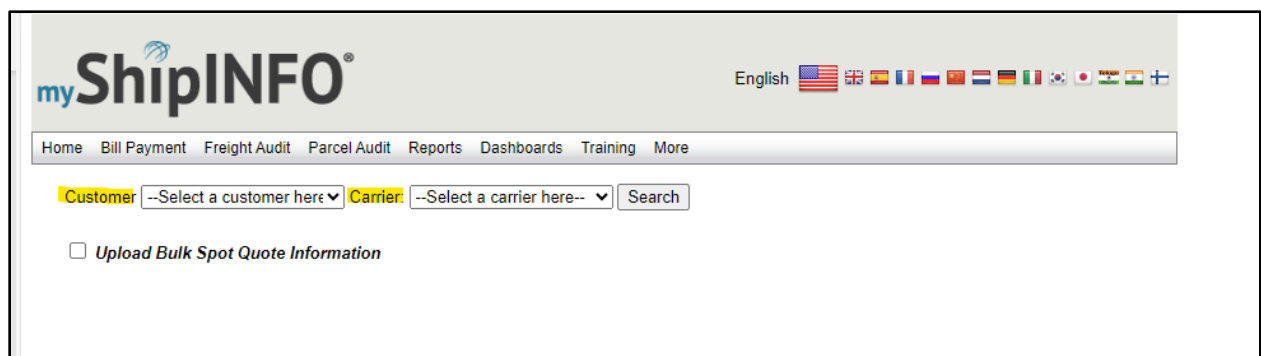- Under "Freight Audit", select "Customer Portal"

- From here, select the "Spot Quote Data Entry" from the list of options. If you do not have this option, please reach out to clientservices-env@koerber-supplychain.com.
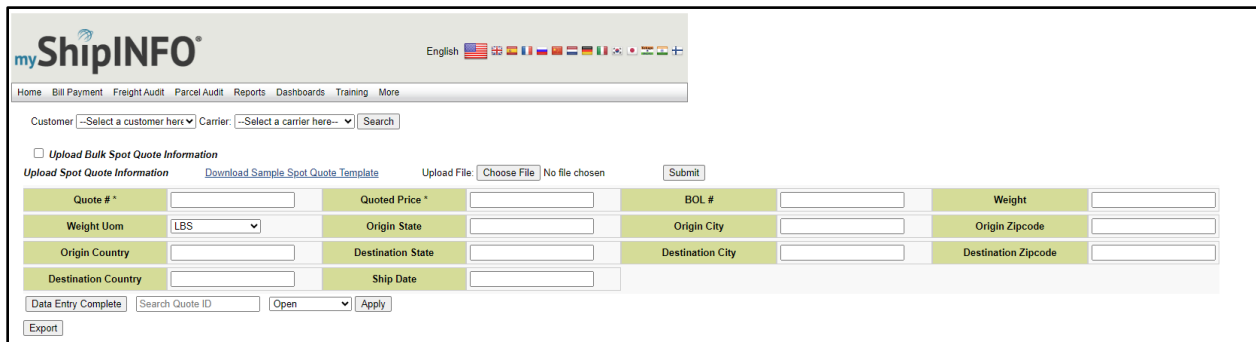

How to enter a single spot quote

- Once inside this screen, you will select the **customer** you wish to upload a spot quote for from the choices in the drop down menu. You will also select the **carrier** you wish upload a spot quote for.
- If you receive an error message when selecting the carrier, please reach out to clientservices-env@koerber-supplychain.com and that team will confirm that carrier is configured in the system to allow spot quote rating
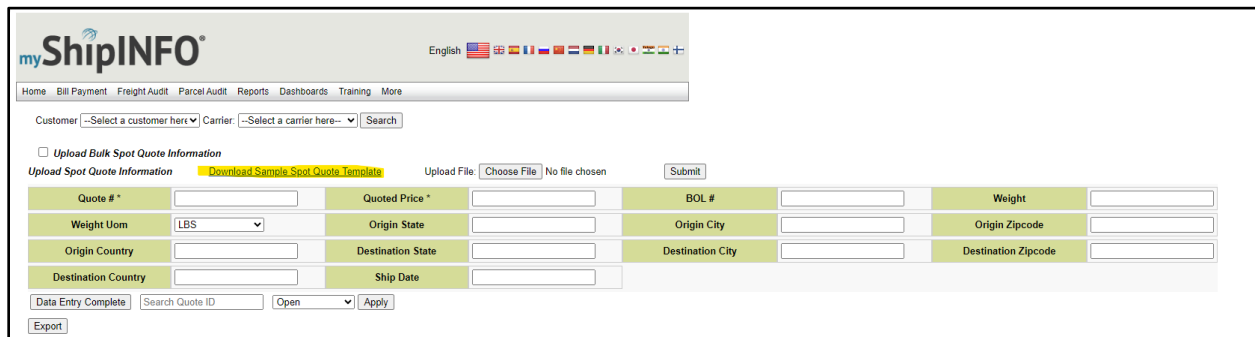
- Once you have selected the necessary Customer and Carrier, you will be presented with specific fields to enter your spot quote information. Required fields will be denoted with an asterisk (*). The other presented fields are available to use if needed, but not required.

- Once you have entered the necessary fields, click the "Data Entry Complete" button below the spot quote fields to the bottom left. Make sure not to leave any required fields blank as this will result in failure of the spot quote to be entered.

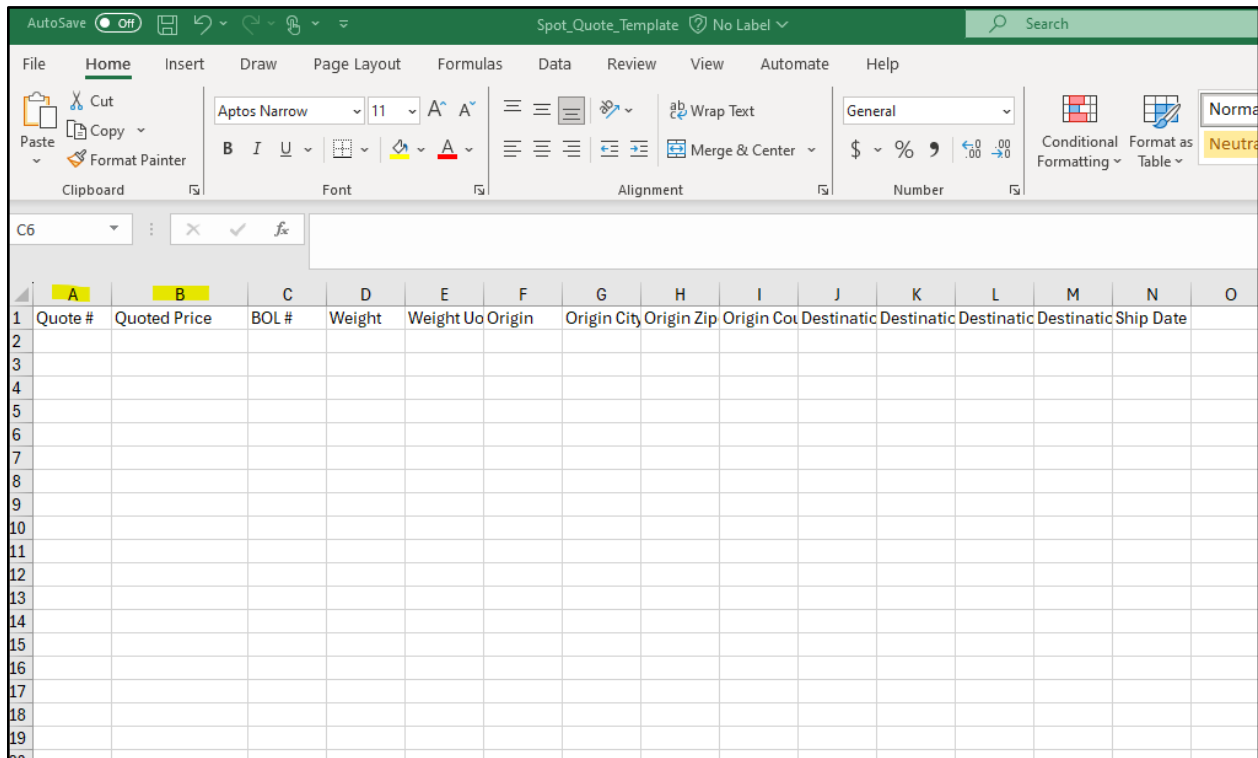## How to enter multiple spot quotes for one carrier

- Inside this same screen, click the link that says "Download Sample Spot Quote Template"

- An excel file will be downloaded to your system which has columns formatted using the same criteria as the fields you see inside the spot quote tool.
- When you open the file, you will be able to input multiple spot quotes per line in the excel file. Note, the required fields with an asterisk (*) from the spot quote fields will not transfer and populate on the excel file with an asterisk beside their title, so you will have to note which columns are required to fill out the same as

you would when entering a single spot quote. (For example below, for this customer/carrier combo, only "Quote #" and "Quoted Price", columns A and B, are required to be filled out. The asterisk does not show in the excel file, but they are still required to be filled out.

- It is also important to note when inputting the "Quoted Price" on the excel sheet, it cannot be in accounting format, which means it cannot have a $ sign beside the quoted price or MSI will not accept the file.

- Once you have filled in all the necessary lines, save your file. Go back to the MSI screen and click the button that says "Choose File". Select the excel file, and then click "Submit".

Freight Audit

- You will receive a message above the spot quote fields stating whether the spot quote file upload was successfully in blue writing, or that the spot quote failed to load in red writing
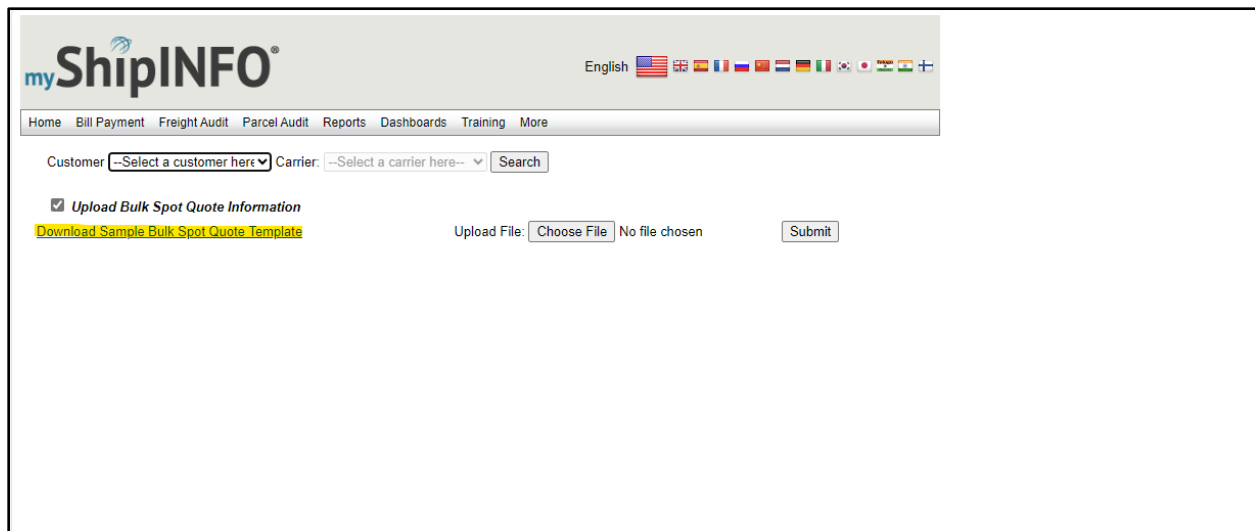
How to enter multiple spot quotes for multiple carriers

- Starting on the same spot quote screen in MSI, select the check box on the top left that says "Upload Bulk Spot Quote Information"

- This will take you to a screen with a link that says "Download Sample Bulk Spot Quote Template". Click this link to download the template.

- This process is like the process for one carrier, except it requires you to enter the carriers SCAC code associated with the spot quote. This will allow you to enter SCAC codes for multiple carriers inside of one spreadsheet.

Freight Audit

- Fill in the necessary information in the spreadsheet as outlined in the process before this, and making sure to also fill in the correct SCAC code that is associated with the spot quote on a line per line basis.

- Once you have completed your excel sheet with the necessary information, save the file. Go back to the screen in MSI, click on the button "Choose File", select the excel file, and then click "Submit".

Contact Info

If you have questions, please contact the Client Services team at clientservices-env@koerber-supplychain.com.