



PETAL

User Training Manual

LLPT 1.3 – Carrier Billing V1.0

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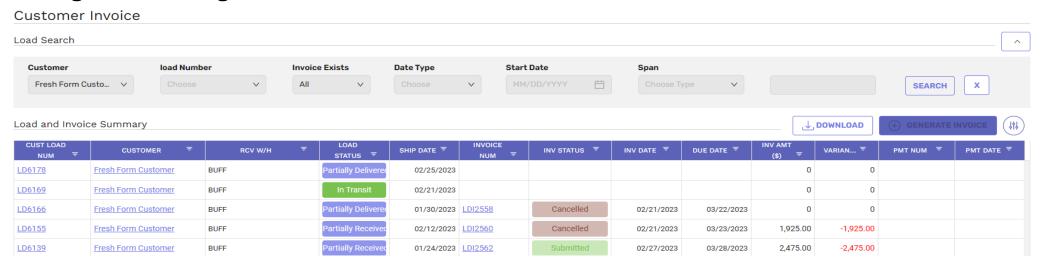


- Load search for Invoicing
- Generate Invoice
- Save Submit or Cancel Invoice

CUSTOMER INVOICE



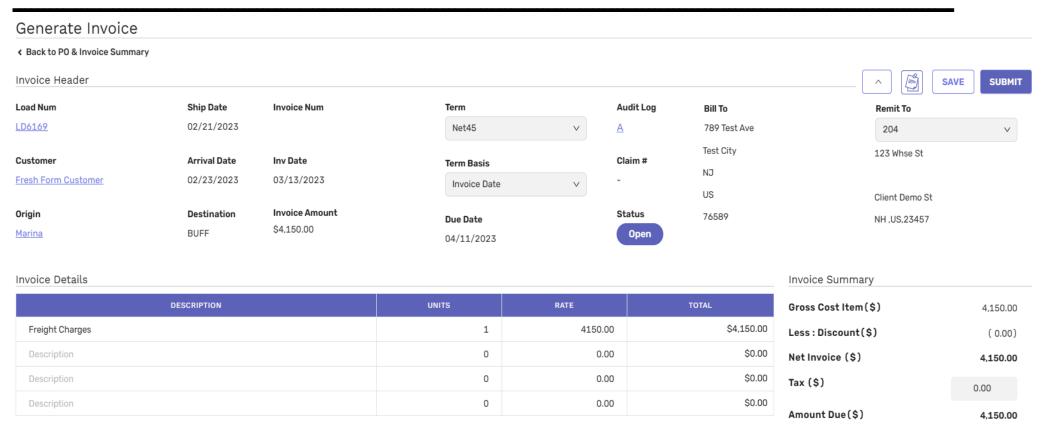
Navigation: Billing -> Customer Invoice.



- ➤ Load search screen provides ability for the carrier to perform multi criteria search on loads that are eligible for invoicing
- > Last applied search criteria is saved and used for subsequent query until the criteria is changed
- ➤ Loads that are in Delivered, partially delivered, in transit, receipt adjusted statuses are retrieved in search results and allow invoice
- ➤ Load results grid allows user to change the column position, apply filters, add or remove selected columns and sort the data based on their preferences and save it as their personalized view.
- > Personalized views can be saved from (iii) icon

GENERATE INVOICE





- > Select the load record and click on 'Generate Invoice' from load search screen to get into generate invoice screen
- Most of the load information gets defaulted to the invoice screen such as load num, Customer name etc.

GENERATE INVOICE



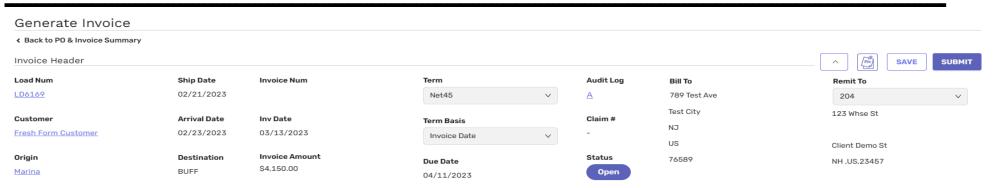
- > Terms and Invoice date basis should be selected from the available dropdown values based on the credit terms being negotiated with the customer
- ➤ "Remit To" should be the dropdown value for sending the payment remittances against the invoice after payment authorization is done by the customer

➤ Invoice Details:

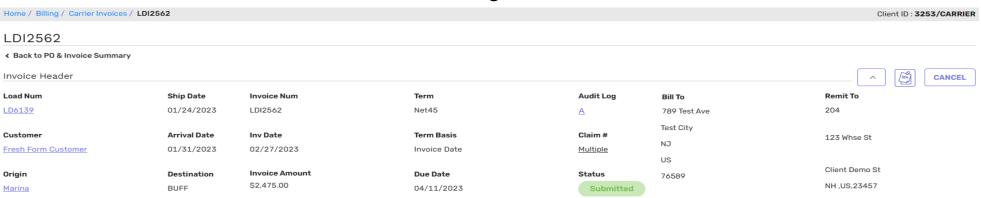
- Load freight value is populated under invoice details section as 'Freight charges' and amount equivalent to the load freight
- Any additional service charges for example redelivery fees can be added to the invoice by entering the free text in 2nd line and add fee amount
- System will automatically calculate the due date based on the terms and term basis selected

SAVE SUBMIT OR CANCEL INVOICE





- > Once invoice entry is completed, it can either be saved for further updates so that the status can be in 'Draft'
- When invoice is submitted, the status changes to 'Submit'



- > Submitted invoice can be cancelled by querying and clicking on 'Cancel' button
- > When an existing invoice is cancelled system allows to process another invoice on the same load by repeating the invoice creation process



Thank You