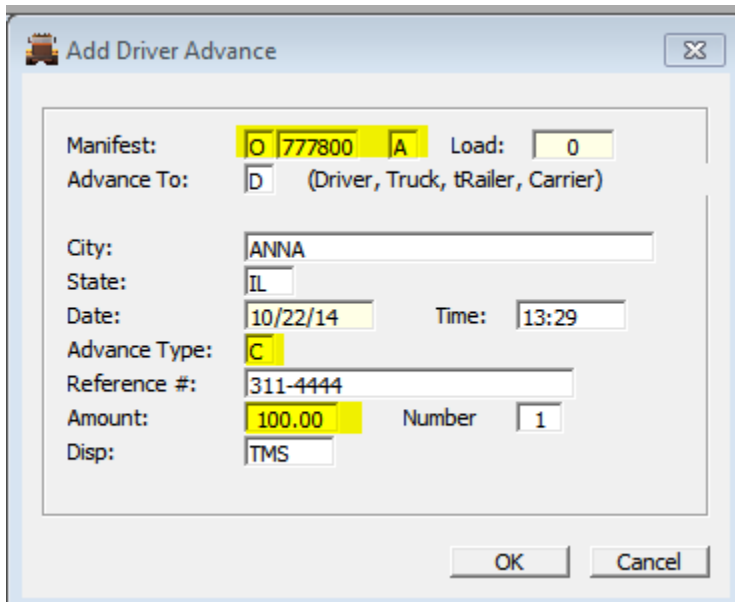# Settlement Default Adjustments

Quite often you will find that you need to adjust a driver (or truck and/or carrier) pay to subtract cash advances, to add extra pay. Oftentimes, these are the same every week, so you can setup what is called a "default adjustment" to automate this process.

So, for example:

GET ADVANCES (GETADV("x"))

A driver gets a cash advance either from a dispatcher, who enters the advance into the system or from a cash card, which can be downloaded into the system.

Notice, in the example below, the reference to which trip he was on when he got the advance, the advance type of 'C' for cash and the dollar amount of the advance.

In Settlements, you will have setup default adjustments. Your TMS Support tech will help you with the formulas. To pull advances you will use a formula GETADV('?') The question mark in this formula will be the Advance type you use. So in the example above, the advance type was C for cash. So the default adjustment to pull cash advances will be GETADV('C')

Edit Adjustment

Description CASH ADVANCE
Sign - (+/-/N)
Percent 0.0000   Amount 0.00
Show Deduction on Settlement Sheet? Y
Allocate Expense Per Trip? N
Send to Accounting? Y
Affect Taxable Gross? N (8BCDEFGHIJKLMNOPQRSTUVWXYZ237)

Expression or Function
GETADV("C")
Account 20501-

OK   Cancel

- Also note: the question asking if this will affect the taxable gross? In this case, cash is being subtracted from his pay, but not from his reportable taxable gross.

When you go to settle the driver and mark the trips you want to pay him for, you will hit <continue> to move on to page two of the settlement process. This is where you will see any advances that the driver was given. You can hit space bar to mark the advances that you want to adjust from his pay.

Truck	Manifest	T	Date	C	Reference	Amount	Init	P	Type Description
1	O-777800-A	D	10/22/14	C	311-4444 ...	100.00	TMS	M	

Mark-Space   Continue   Back   Edit-F2   Delete-F3   Add-F4   UnMark

Then hit your <continue> button and go to the third page of settlements. This will show all of the default adjustments you have set up and will calculate the adjustments automatically, using the formulas.

- Note: if an adjustment has a formula, you cannot edit it.

In another example, say you have put additional charges on a load, such as fuel surcharge and detention. But, you not only want to bill for it, you want to pay the truck for it. You can set up a formula referred to as a GETMISC

GET MISCELLANEOUS (GETMISC)

Put your additional charges on your load. For this example we have both a fuel surcharge for $500 and detention for $200.

We want to pay our trucks 100% of the fuel surcharge and 80% of detention, so we go into our truck default adjustments and setup the following formulas:

GETMISC("CODE='DETENT'","ADDCHG") * .80

You can use a similar formula for fuel surcharge

GETMISC("CODE='FUELSC'","ADDCHG")

With the above setup, any time you settle a trip that has the above additional charges on a load, it will automatically pay the truck. You will see this on the third page of the settlement.

It calculates automatically. The truck is paid 100% of the fuel surcharge and 80% of the detention, on top of his regular pay for this load.

These are basic formulas, but there are much more advanced formulas, depending on your needs.

Call TMS Support 618.549.5550 or email us at support@tmshome.com if you would like help setting up these default adjustments.