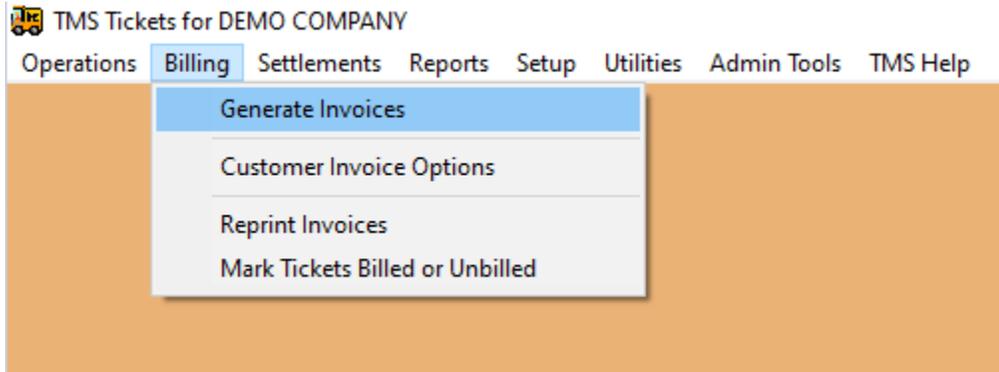
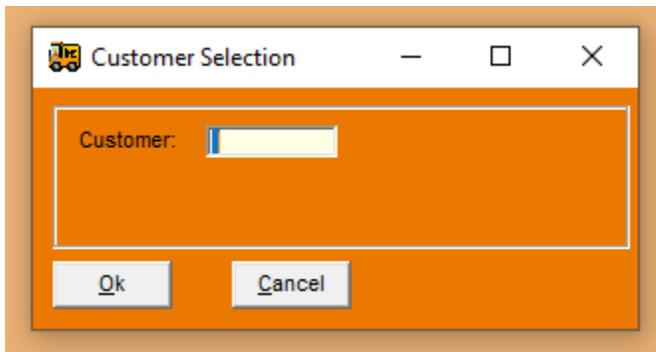


Tickets Billing

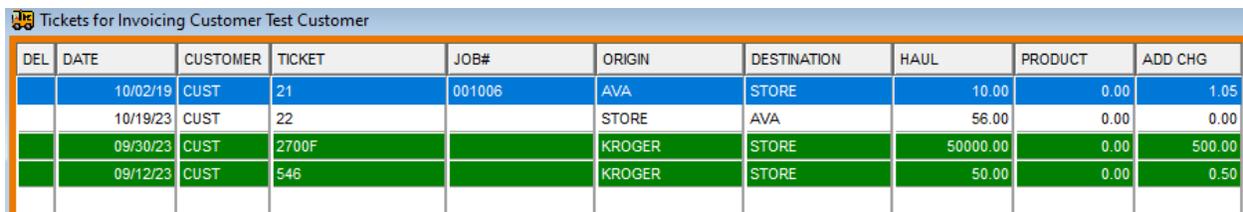
From the TMS Tickets Main Menu select Billing - Generate Invoices



Choose a Customer



A list of their unbilled tickets appears.



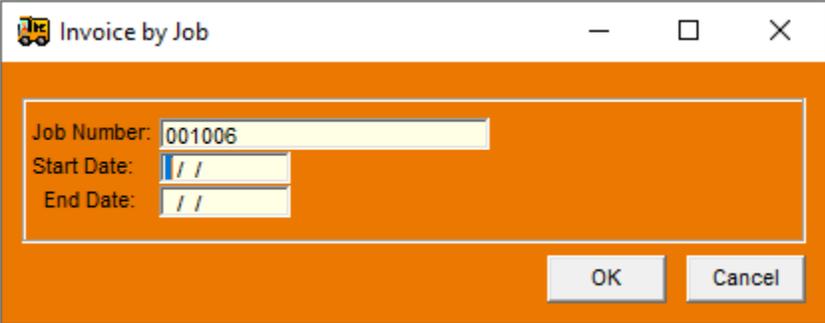
DEL	DATE	CUSTOMER	TICKET	JOB#	ORIGIN	DESTINATION	HAUL	PRODUCT	ADD CHG
	10/02/19	CUST	21	001006	AVA	STORE	10.00	0.00	1.05
	10/19/23	CUST	22		STORE	AVA	56.00	0.00	0.00
	09/30/23	CUST	2700F		KROGER	STORE	50000.00	0.00	500.00
	09/12/23	CUST	546		KROGER	STORE	50.00	0.00	0.50

At the bottom of the browser are some choices on marking the tickets you want to bill.



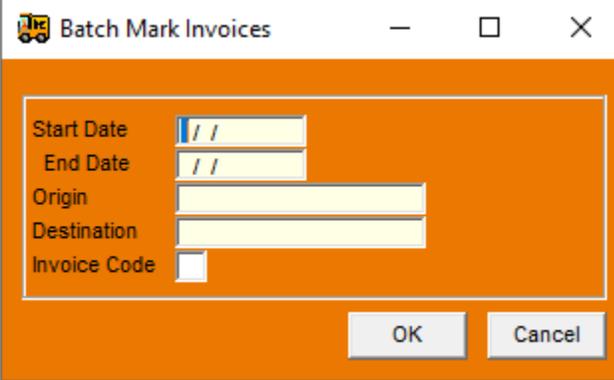
You can hit the space bar to choose tickets (marked tickets turn green)
or you can use the other buttons to mark ALL

or mark by JOB



The screenshot shows a dialog box titled "Invoice by Job". It has a white title bar with a small icon on the left and standard window controls (minimize, maximize, close) on the right. The main area has an orange background. Inside, there is a white-bordered box containing three input fields: "Job Number:" with the value "001006", "Start Date:" with " / /", and "End Date:" with " / /". At the bottom right of the dialog are two buttons: "OK" and "Cancel".

or mark by BATCH



The screenshot shows a dialog box titled "Batch Mark Invoices". It has a white title bar with a small icon on the left and standard window controls (minimize, maximize, close) on the right. The main area has an orange background. Inside, there is a white-bordered box containing five input fields: "Start Date" with " / /", "End Date" with " / /", "Origin" (blank), "Destination" (blank), and "Invoice Code" (checkbox). At the bottom right of the dialog are two buttons: "OK" and "Cancel".

Invoice code is one of the user defined fields in the ticket entry, if this is not being used to separate revenue or billing, let the entry default to blank meaning all codes.

When all the invoices you want to bill have been marked, click the invoice button.
The options box will appear (defaults can be set up)

Invoice Options

Invoice From To

Invoice Date

Sort By (1-Origin 2-Destination 3-Both 4-Date 5-Ticket 6-Custom)

Custom Sort

Secondary Sort (By Date or Ticket)

Combine Charges (To Haul/Product/Neither)

Print Location Detail? Full Address?

Print Sub-Totals?

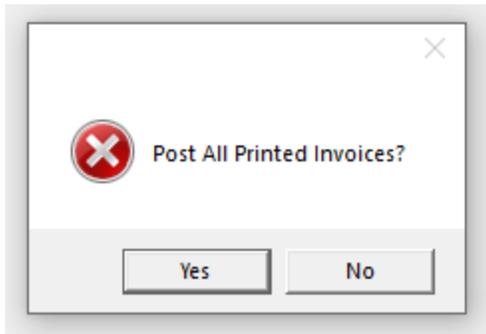
Summary Only?

OK Cancel

Date range is automatically filled in according to the tickets chosen. The rest of the menu options determine how tickets should be organized on the invoice and other details you might want printed (or not).

After you click OK the Print Preview will pop up where you can review the invoice, always double check the totals.

After you review and print or email the invoice, click EXIT and you will be asked to POST.

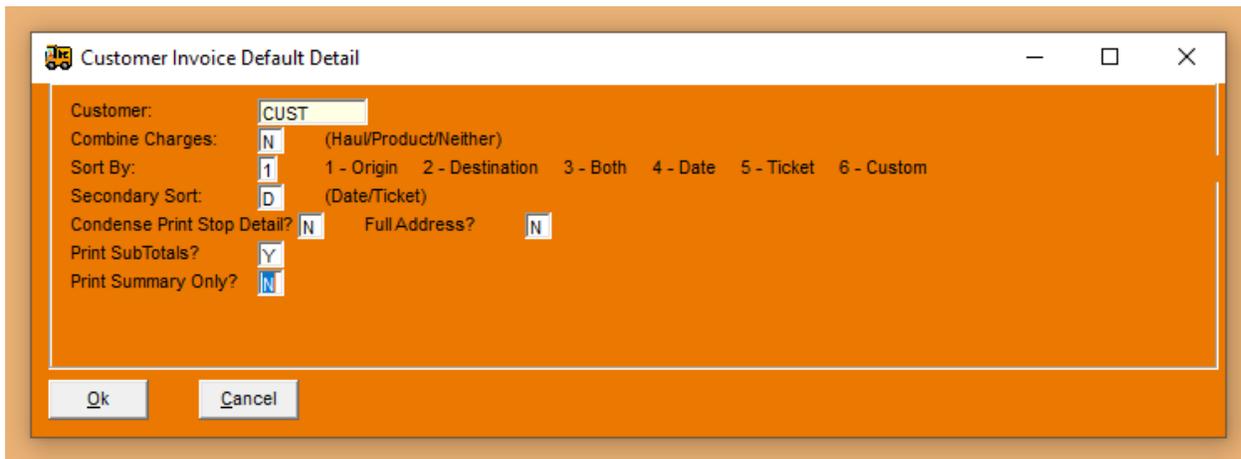


This sends the invoices to the account link interface (Black Box) for further processing.

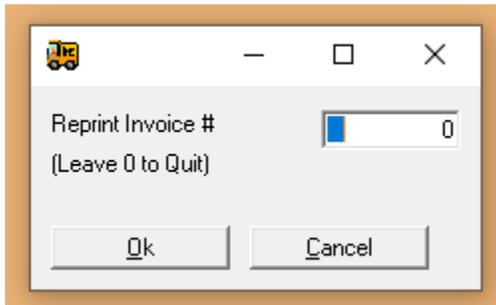
Other choices on the Billing Menu

Customer Invoice Options

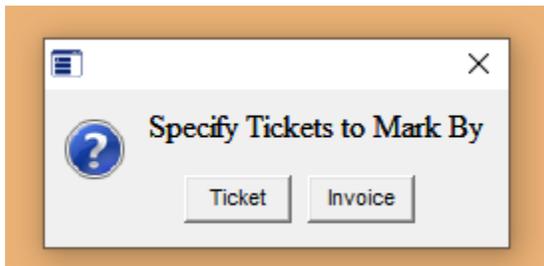
This allows you to set up defaults for individual customers.



Reprint Invoices



Mark Tickets Billed or Unbilled



After tickets have been posted, they are considered to be billed. Billed tickets will not allow edit or delete. Tickets may be unbilled by Ticket Number or by Invoice number.

Ticket number would be useful **ONLY** if you needed to edit a ticket for something other than rate, i.e. driver, truck, origin, etc. Once the edit has been completed remark the ticket as billed by entering the unbilled ticket option by ticket number, enter the ticket just edited and select Re-bill. This will mark that ticket as billed without changing the invoice number originally used. If a rate must be changed on a ticket, the entire invoice should be re-done to keep AR files in order.

Invoice number would mark any ticket on the specified invoice as unbilled, and allow edit or re-billing. Caution; If you are unbilling an invoice that will be re-billed, the original invoice **MUST** be voided in your accounting package to avoid duplicate billings.

What If Something Is Wrong?

The following questions are common when problems occur during billing.

***Wrong Dates**

Q. What if I entered the wrong dates to be included on this invoice, now some tickets are included that should not be?

A. See above for unbilling details.

***Wrong Customer**

Q. What if a ticket were posted to the wrong customer?

A. See above for unbilling details.

***Interruption during the process**

Q. What if a power outage occurs during posting tickets or any other type of interruption?

A. This can be a problem. You should immediately contact TMS Support. Files go through various stages of update during the posting process. Depending on which step was occurring at the time of the interruption, files may or may not have updated. Support can identify where the process stopped and make corrections.

***Paper jams in the printer**

Q. What if I had printed and posted multiple invoices, only to find that my printer was jammed or out of paper.

A. If you had completed the posting to accounts receivable process the tickets included on those invoices would have to be unbilled and billed again. See Unbilling above for details.