## **RECALCULATE SHIPPER YTD TOTALS**

On the 2<sup>nd</sup> screen, upper left hand corner of the shipper is the sales information. While the other balances flow and epp, your YTD Sales number needs to be zeroed out for a new year.

🗸 Edit Customer ID: CHICAG - SHIPEDIT2					
Page 2 of 2					
Terms	DUE 30 DAYS	Sales Disc	0.000	Contract	11
Credit Limit	100000	Sales Tax	0.000	Expires	11
Current Balance	0.00	Payment Disc	0.000		
Unbilled Balance	0.00	Net Due Days	30	Max Days	0
YTD Sales	0.00				
Last Sales Amo	0.00	Fin Chg %	0.000		
Fuel Surcharge		FSC %	0.0000	Rate/Mile	0.0000
EDI Code		Ping Code			
		Agent			
Default INTERSTA	TE Tariff	Hours to Site	0.00		
INTRASTA	TE Tariff	Remit To	Bill T	D	
Stop-off					
Instructions					
GST Exempt? N		Free Detention Hours	0.00		
DUNS		Summary or Detail Invoice	D	Default ICC	
Service Days		Consolidated Invoice?	N	Class	
Default Weight	(Orig/Dest/blank	) Volume Multiplier	0.0000		
Dflt Commodity				stom Invoice	
Invoice Comments			Custom M	ovement Bill	
Invoice Type	<u> </u>				
Alternate Rating					
Restrict Trail Types					
				ОК	Cancel

This is where the admin tool comes into play

Utilities	Admin Tools TMS Help Quick Call
	User/Groups Group/Access
	Clear Multi-User Lock File Delete Unused Temp Files Browse Database Files Active Time Custom System Setup
	Clear Manifest from Inactive Drivers and Vehicles Mark Shipper Inactive
	Relcalulate Shipper YTD Sales
	Cleanup DpPoint Database Clear Distance File

After you have run all of the reports you might need for year end, you will probably want to recalculate those totals. Also note this will calculate and populate the current year totals for you.

	×
8	This procedure recalculates Customer YTD Sales Amounts based on the Dispatch Invoice Log File. It will total Posted Invoices for the current year, after 01/01/24. Do you want to continue with this procedure?
	Yes No Cancel

After answering yes and running the tool

