# Settlements Rates and Adjustments

These options will be used to define withholding and adjustments to each settlement. There are also options to set driver, truck and trailer pay rates but only if those rates will be the same for all records in the system. Individual rates that differ from other records should be set in the individual file maintenance screens.

Set Rates

Do you want to set a default rate for all drivers/trucks/trailers? Answering 'Y' will set all to the same pay rate. Answer 'N' returns you to the menu. This can be used ONLY if setting all to the same rate.

Set Default Adjustments

These are set up the same for driver, truck, trailer, agent, salesperson and carrier.
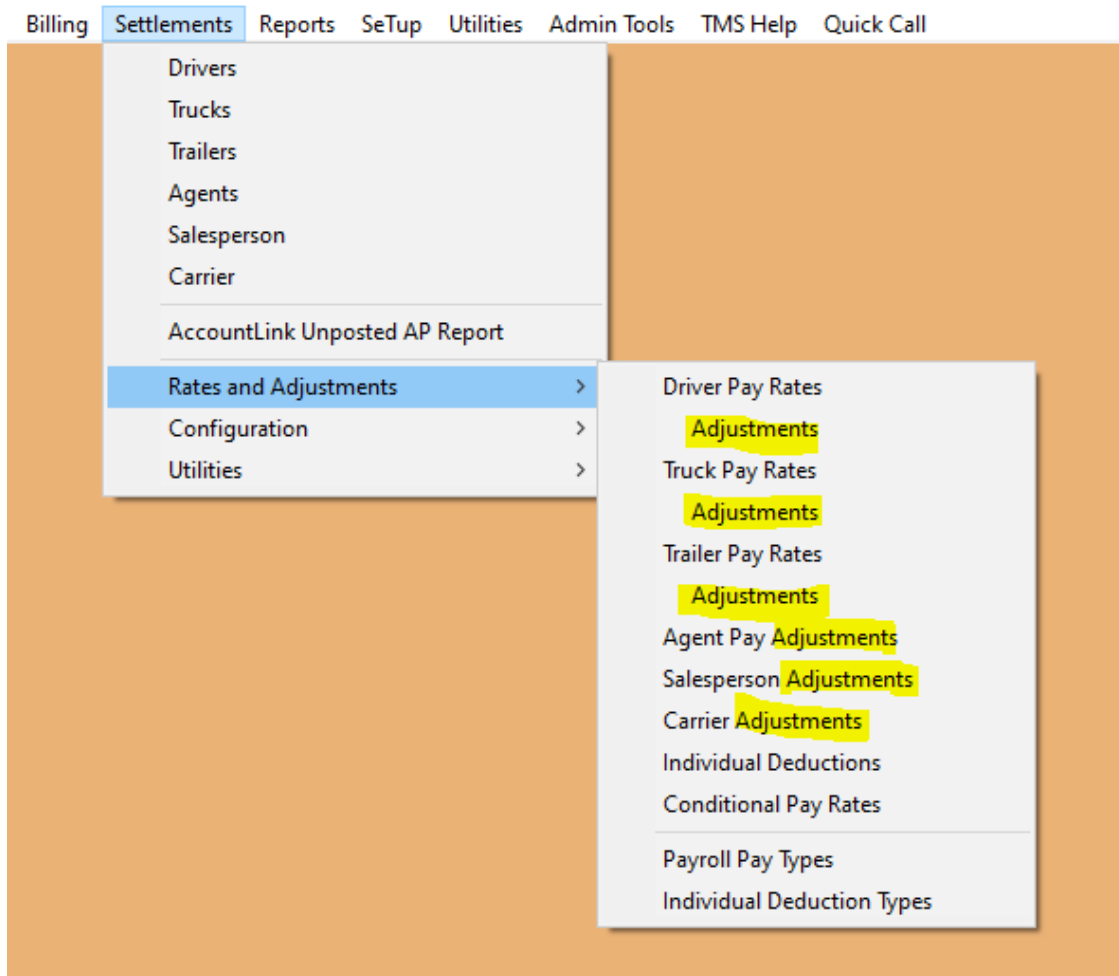
This option allows you to set up adjustments to pay. These should be adjustments that will apply repeatedly, (i.e. per diem, advances, etc.). One time only adjustments can be made during the settlement procedure for the pay period to which the adjustment applies.

These adjustments may also be deleted during the settlement procedure if they do not apply for that specific pay period. Deleting from the settlement screen does not delete permanently. Adjustments may only be added, edited or deleted permanently from this screen.
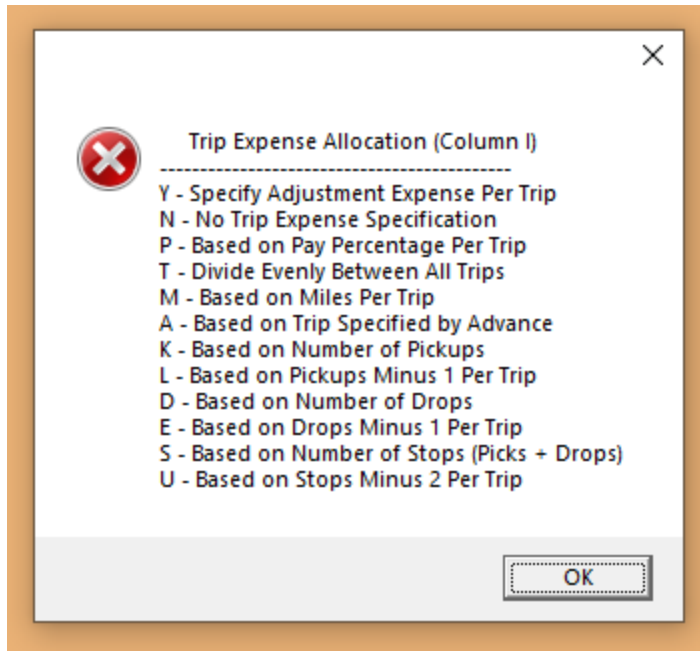

Description - This is a descriptive field that will be printed on the settlement printout to explain the adjustment.

Sign - Entering "+" will cause this adjustment to be added to the gross settlement. A "-" will deduct this amount.

Percent - Enter a percent (whole number) if this deduction will be based on a percentage of total pay. Leave 0 if amounts will vary with each pay period.

Amount - Enter an amount if this will be a flat addition/deduction to each pay, every pay period. Leave 0 if amounts will vary with each pay period.

Allocate Expense Per Trip - This option is for individual trip expense allocation. This helps keep the profit reporting in Dispatch more accurate and detailed. You have several choices and also a pop up if you put in something invalid. The pop up also shows some additional choices.

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                                          ×
        ⊗   Trip Expense Allocation (Column I)
            ------------------------------------------
            Y - Specify Adjustment Expense Per Trip
            N - No Trip Expense Specification
            P - Based on Pay Percentage Per Trip
            T - Divide Evenly Between All Trips
            M - Based on Miles Per Trip
            A - Based on Trip Specified by Advance
            K - Based on Number of Pickups
            L - Based on Pickups Minus 1 Per Trip
            D - Based on Number of Drops
            E - Based on Drops Minus 1 Per Trip
            S - Based on Number of Stops (Picks + Drops)
            U - Based on Stops Minus 2 Per Trip


                                    OK
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Send to Accounting - Entering 'Y' in this column will cause this adjustment to be included in the amount being sent to Payroll. Entering 'N' will cause it to be excluded.

Affect Taxable Gross - Entering 'T' for taxable, this identifies this adjustment as taxable. 'N' identifies non-taxable adjustments and 'O' for other. Other would be used for many advances that are reimbursed or deducted from gross pay, i.e. fuel purchases, cash advances, etc. Basically they are not considered when calculating taxes

Exclude from Mileage summary – IF you have INCLUDE MILEAGE SUMMARY set (Settlements-System Configuration-Paysheets)—which shows on the settlement what the pay per miles is—then this setting allows for certain adjustments to NOT be included in those calculations. In addition, Hourly pay is not included in these calculation.

Expression or Function - This field will allow a function (formula) entry of predefined variable names. Using these variable names, drivers can be paid according to specific user defined criteria, for example: if a drivers is to be paid for extra pickups after the first one, the formula would be "**IIF mPicks1>1,(mPicks-1)*10,0**". This function tells the system "if the variable representing the number of pickups (mPicks) is greater than one, then multiply the number of pickups (after the first one) by 10 ($10 per pickup) otherwise pay 0."

Contact the TMS Support Team for assistance.

Account - Enter the account number to which this adjustment will be posted in General Ledger. You should have a **F1** pop-up available at the account field to display all valid account numbers, description, and account status.