



Qv21
Technologies

2024

Steps for Billing Process



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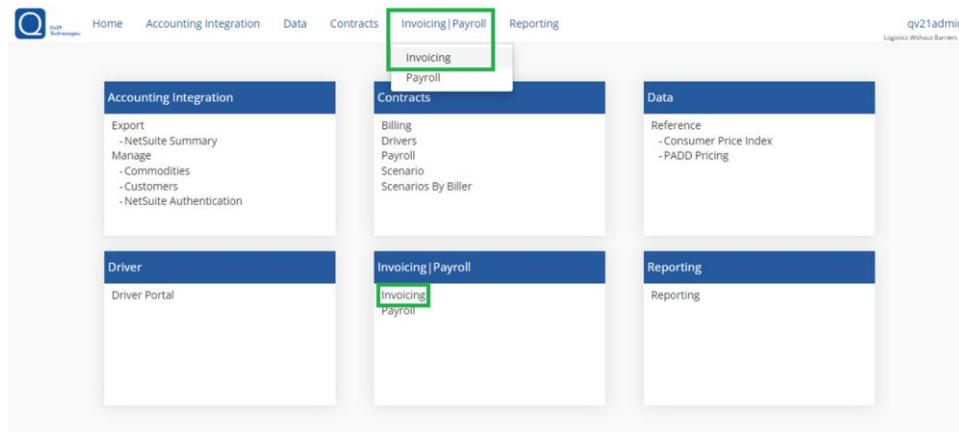
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Creating a New Invoice

1. To begin invoicing, navigate to the Rating and Invoicing page by selecting Invoicing from either under the Invoicing|Payroll dropdown at the top of the Home page or in the Invoicing|Payroll category in the middle of the window.



2. The parameters at the top of this page can be used to search for invoices by Biller, by their Invoice Dates, by their Invoice Numbers, or by their Customer Invoice IDs. They can be filtered by the Status for easier management.

To create new invoices, click the + icon in the upper-right corner of the window and choose to either Create Single Invoice or Create Multiple Invoices.

Rating and Invoicing

Start Date

End Date

Status

Max Results

1/1/2020

4/3/2024

Open

100

Search

Billers

Invoice Number	Customer Invoice Id	Status	Biller	Shipper	Receiver	Commodity	Invoice Date	Load Count	Grand Total	Action
2719		Open	Alan Oil Company			Any	4/5/2021	1	250.00	
2720		Open	Alan Oil Company			Any	4/5/2021	1	250.00	
2633		Open	E1			Any	3/10/2021	1	250.00	



3. In the Create Single Invoice window, simply select a Biller and date range to search for unbilled tickets. Note that Shipper, Receiver, and Commodity information can also be specified here but are optional fields. Only the Biller and date range are required to search for loads.

Search Transactions

Shipper

Receiver

Start Date

3/20/2024

End Date

3/21/2024

Date Target

Ship

Receive

Class

Any

Only non-invoiced

☒

Search

Found 1 transactions.

Invoice Details

Biller

WM LITHONIA

Invoice Number

3/20/2024

Status

Open

Terms

Available Transactions

	✓	Dates	Shipper	Receiver	Biller	Commodity	Driver	Carrier
03/20/2024 05:44 am	✓	Qv21 Test Pick Up Loc: Qv21 Test Drop Off Lo	WM LITHONIA	Class 3	Qv21 Test Driver	1170		
03/20/2024 05:44 am	✓	Qv21 Test Pick Up Loc: Qv21 Test Drop Off Lo						

Selected Transactions

	✓	Dates	Shipper	Receiver	Biller
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4. To add loads to a new invoice, use the checkmarks on the left to select desired jobs. The check at the top with the column headers will select or deselect all loads that are available. Once selected, use the Add Checked Results to Invoice option by selecting the page icon beneath the search button. If any loads are red (meaning they still need to generate a value), the RIDP screen will show a prompt to let the user know.

Search Transactions

Shipper

Receiver

Start Date

1/1/2023

End Date

4/9/2024

Date Target

Ship

Receive

Class

Any

Only non-invoiced

☒

Search

Found 9 transactions.

Available Transactions

	✓	Dates	Shipper	Receiver	Biller	Commodity
01/03/2024 03:15 pm	✓	Austin Transfer	Austin Landfill	Waste Management	sand	
01/04/2024 11:33 am	✓	Austin Transfer	Austin Landfill			
01/17/2024 03:23 pm	✓	Austin Transfer	Austin Landfill	Waste Management	msw	
01/18/2024 10:46 am	✓	Austin Transfer	Austin Landfill			

Selected Transactions

	✓	Dates	Shipper	Receiver	Biller
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5. Once the loads have moved to the Selected Transactions area on the right side of the page, they are ready to be added to the invoice. Select Save to save the invoice without opening it or Save and Edit Invoice to view the new invoice immediately.

Home

Accounting Integration

Data

Contracts

Invoicing|Payroll

Reporting

qv21admin

Logistics Without Borders

Save and Edit Invoice

Invoice 25561 Open

Search Transactions

Shipper: 3/20/2024 Ship Receive Any Found 1 transactions.

Receiver: 3/21/2024

Search

Available Transactions

	Dates	Shipper	Receiver	Bill	Commodity	Driver	Carrier

Invoice Details

Bill: WM LITHONIA Invoice Number: 3/20/2024

Status: Open Terms:

Selected Transactions

	Dates	Shipper	Receiver	Bill	Commodity	Driver	Carrier
	03/20/2024 05:44 am		Qv21 Test Drop Off Lo- WM LITHONIA		Class 3	Qv21 Test Driver	
	03/20/2024 05:44 am		Qv21 Test Drop Off Lo-			1170	



- Invoice 25561

Customer

WM LITHONIA

Contact

Name

Nichole Christopher- BUW04115

Address

2784 Woodwin Road

Doraville, GA 30360

Details

Customer Invoice Id

Invoice Date

3/20/2024

Status

Open

Terms

Bills (1)

Bill Number	Comments	Shipper Courtesy #	Receiver Courtesy #	Date	Shipper	Receiver	Class	Type	Total		Action
		hello	world	3/20/2024	Qv21 Test Pick Up ...	Qv21 Test Drop Off...	Class 3	Standard	7.88		

5



Exporting the Invoice

7. If the rates, load count, and total appear correct, the invoice is finished or ready to be exported to an external software. Before concluding invoice creation, we recommend setting the status using the Status box on the left side of the page.

Note that invoices must be in Open status before regenerating.

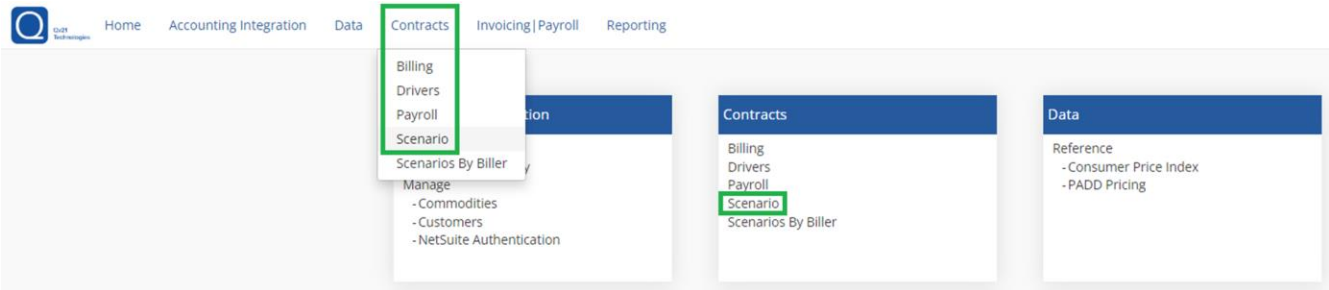
The screenshot displays the 'Invoice 25561' interface. On the left, there are sections for 'Customer' (WM LITHONIA), 'Contact' (Nichole Christopher- BU#04115, 2784 Woodwin Road, Doraville, GA 30360), and 'Details' (Customer Invoice Id, Invoice Date: 3/20/2024). A dropdown menu is open under the 'Details' section, showing status options: Open, Validated, Closed, Factored, Paid, and Refunded. The 'Open' status is highlighted. On the right, a table titled 'Bills (1)' contains one row with the following data: Bill Number, Comments, Shipper Courtesy #, Receiver Courtesy #, Date (3/20/2024), Shipper (Qv21 Test Pick Up ...), Receiver (Qv21 Test Drop Off ...), Class (Class 3), Type (Standard), Total (7.88), and Action.

8. Once the status has been adjusted, export the invoice using the arrow icon in the upper-right corner of the page. This can also be done by using the multi-select on the Rating and Invoicing page to export multiple invoices simultaneously.



Adjusting the Invoice Rates

If the rates do need to be adjusted, this can be done in the contract by selecting the Scenario option under the Contracts dropdown or on the Contract tile on the homepage.



On the Scenario Contracts page, locate the scenario in need of adjustment using the search parameters.

Scenario Contracts

Contract Date
Any

Commodity Type
Any

Region
Any

Shipper Name
Qv21 Test Pick Up Location

Receiver Name
Qv21 Test Drop Off Location

Billor Name

Search

Scenario	Shipper	Shipper Dock	Receiver	Receiver Dock	Billor	Commodity
Contract Template - Lower Atlantic PADD 1C - Contract 9 (Do Not Remove)	Qv21 Test Pick Up Location		Qv21 Test Drop Off Location		Qv21 Test Biller	
Contract Template - Lower Atlantic PADD 1C - Contract 8b (Do Not Remove)	Qv21 Test Pick Up Location		Qv21 Test Drop Off Location		Qv21 Test Biller	
Contract Template - Lower Atlantic PADD 1C - Contract 8a (Do Not Remove)	Qv21 Test Pick Up Location		Qv21 Test Drop Off Location		Qv21 Test Biller	



To adjust a scenario’s rates, make a change to one of the values in the contract and use the save button to save the adjustment. Note that the User Codes can also be edited here, which are codes used in exporting to external software to identify ticket data.

Scenario Contracts 🔍 📄 💾

Contract Template - Lower Atlantic PADD 1C - Contract 9 (Do Not Remove) (Any) +

BILLING RATES AND FEESCOMPANY RATES AND FEESCARRIER RATES AND FEESDEFAULT CARRIER RATES AND FEESUNION RATES AND FEES

Rates ⌵

No filter ⌵

Actions	Rate	Description	User Code	1/2/2026
Trip Rates				
Load Rates +				
	PerLoad	Per Load		0
	PerTonS	Per Ton (Shipper)	MSW	50.00
	PerTonR	Per Ton (Receiver)		0



Once the scenario contract’s rates have been adjusted, update the jobs in the invoice with the new rates by regenerating. The process of invoice regeneration recalculates all loads in the invoice with the most current rates.

Note that invoices must be in Open status before regenerating.

To test the updated rates, we recommend first regenerating a single load to ensure the rates reflect the desired totals, as regenerating a single load is a quicker process than regenerating all loads in an invoice. Individual jobs can be regenerated by selecting the circular arrow icon shown beside each load and will move to the bottom of the invoice after regeneration, unless the columns are sorted.

Alternatively, the entire invoice can be regenerated by opening the Actions menu and selecting Regenerate Invoice.

Note that initiating multiple regenerations on the same invoice prior to the initial regeneration’s completion can cause disruptions in the process.

Invoice 25561

Customer

WM LITHONIA

Contact

Name

Nichole Christopher- BU#04115

Address

2784 Woodwin Road

Doraville, GA 30360

Bills (1)

Bill Number	Comments	Shipper Courtesy	Receiver Courtesy	Date	Shipper	Receiver	Class	Type	Total	
		hello	world	3/20/2024	Qv21 Test Pick ...	Qv21 Test Drop ...	Class 3	Standard	7.88	Regenerate Bill

Actions

Invoice 25561

Customer

WM LITHONIA

Contact

Name

Nichole Christopher- BU#04115

Address

2784 Woodwin Road

Doraville, GA 30360

Bills (1)

Bill Number	Comments	Shipper Courtesy	Receiver Courtesy	Date	Shipper	Receiver	Class	Type	T
		hello	world	3/20/2024	Qv21 Test Pick ...	Qv21 Test Drop ...	Class 3	Standard	

Save and Edit Transactions

Delete Invoice

Download Invoice Report

Download Invoice Package

Regenerate Invoice

Please feel welcome to reach out our team at Onboarding@qv21.com or Support@qv21.com for more information or further assistance.