Qv21 Technologies

2024

Steps for Billing Process

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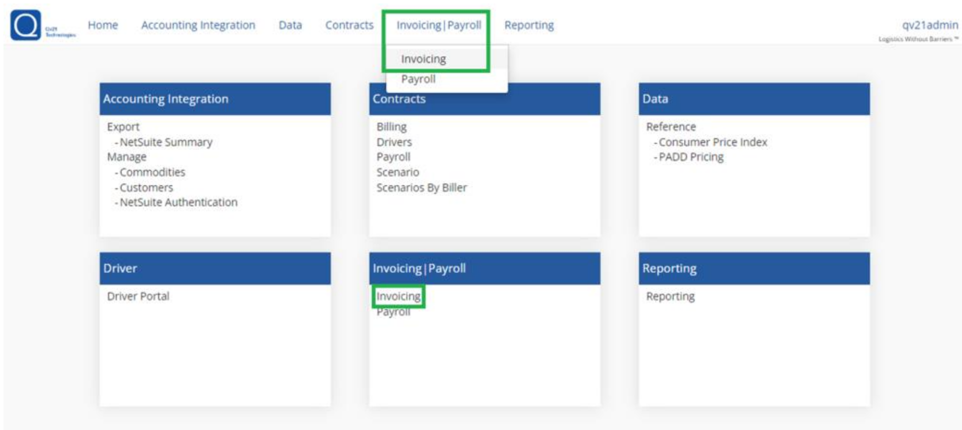
Introduction to Billing Process – Table of Contents

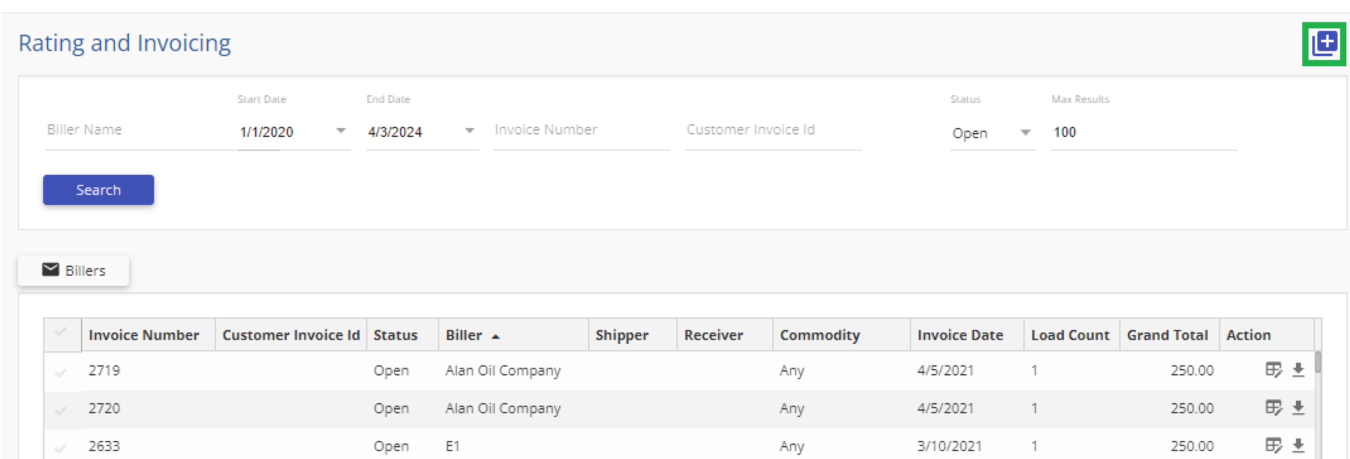
Creating a New Invoice

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.

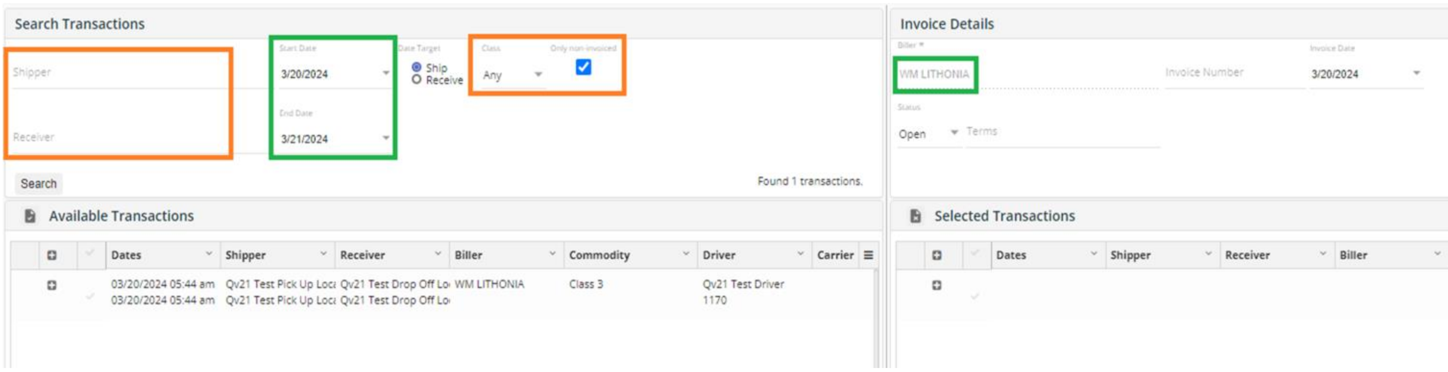


2. The parameters at the top of this page can be used to search for invoices by Biller, by their Invoice Dates, by their Invoice Numbers, or by their Customer Invoice IDs. They can be filtered by the Status for easier management.

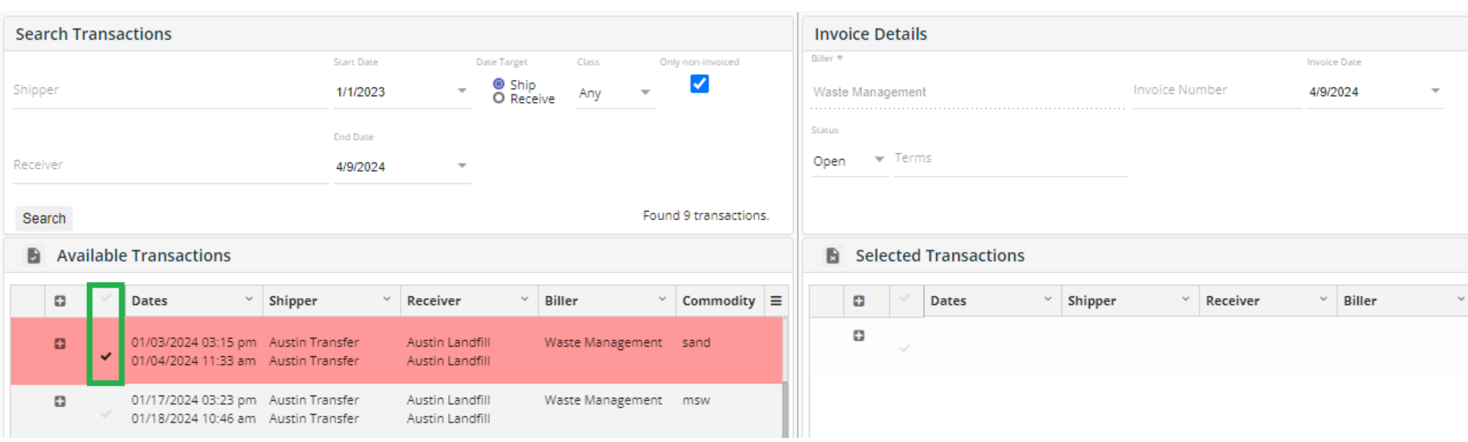
   To create new invoices, click the + icon in the upper-right corner of the window and choose to either Create Single Invoice or Create Multiple Invoices.



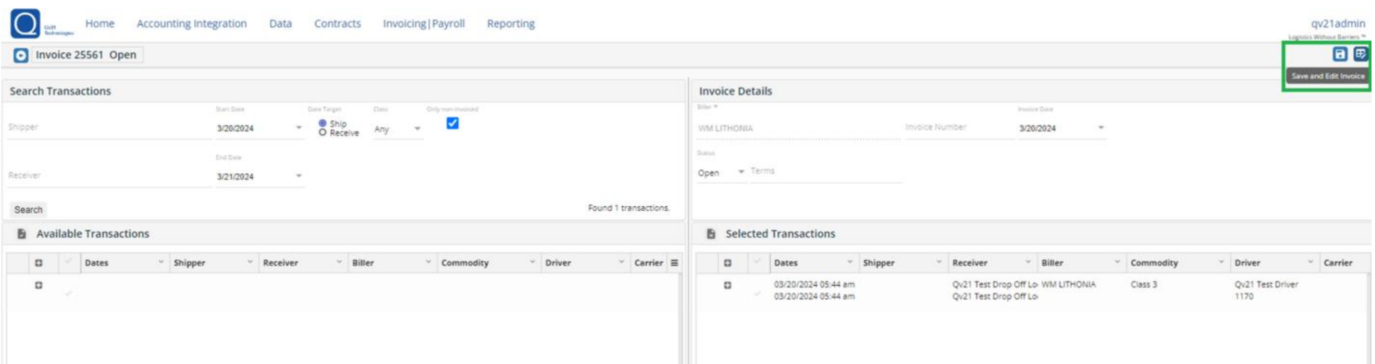
3. In the Create Single Invoice window, simply select a Biller and date range to search for unbilled tickets. Note that Shipper, Receiver, and Commodity information can also be specified here but are optional fields.
   Only the Biller and date range are required to search for loads.



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.

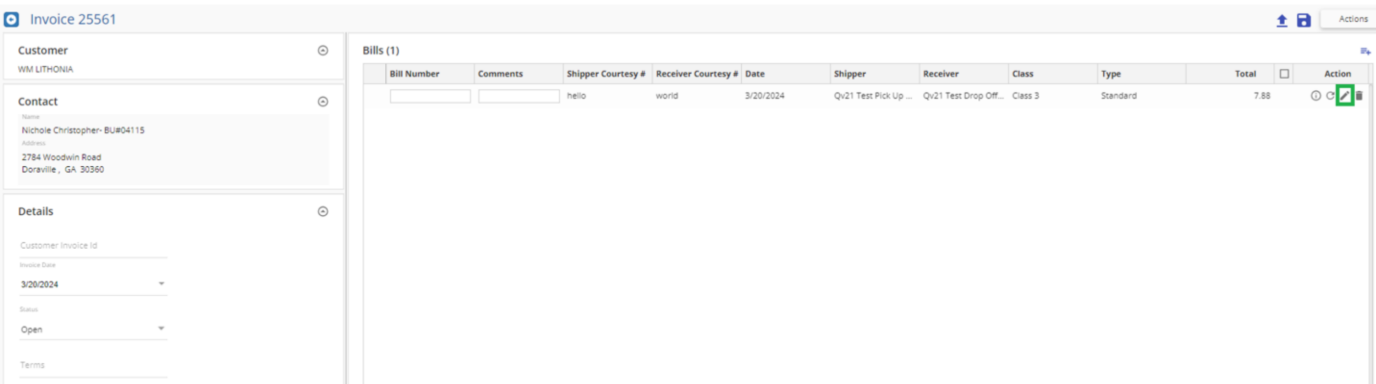


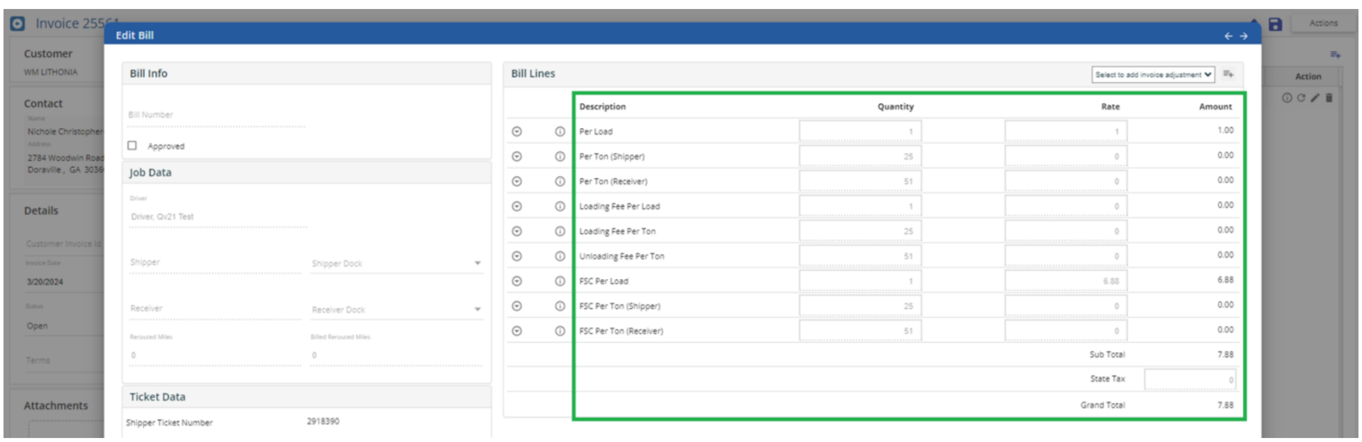
5. Once the loads have moved to the Selected Transactions area on the right side of the page, they are ready to be added to the invoice. Select Save to save the invoice without opening it or Save and Edit Invoice to view the new invoice immediately.



Verifying the Invoice's Rates

6. Once the new Invoice has been built, the rates can be referenced by selecting the pencil icon on an individual load.

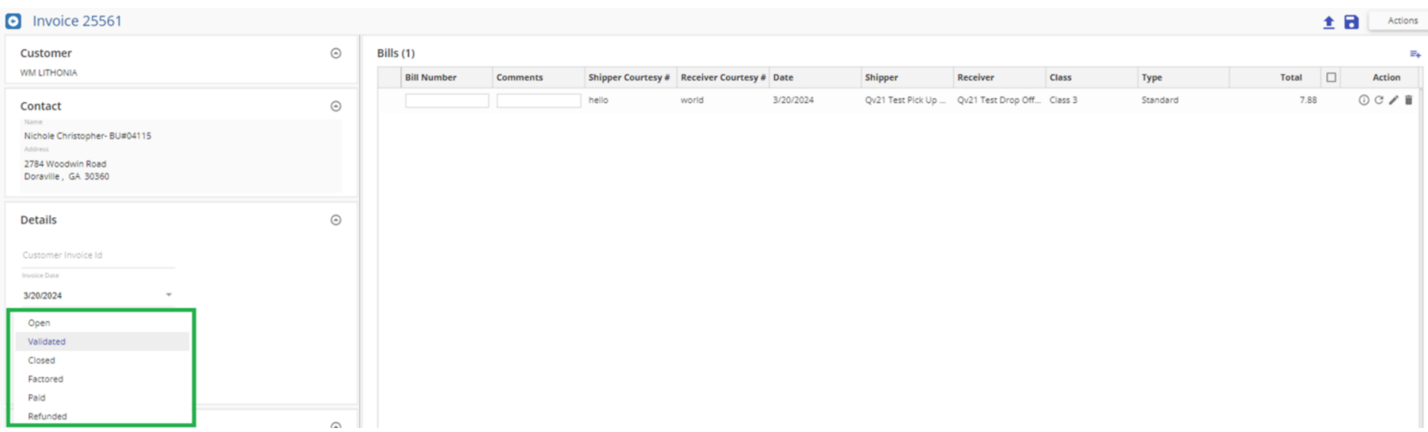




Exporting the Invoice

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.

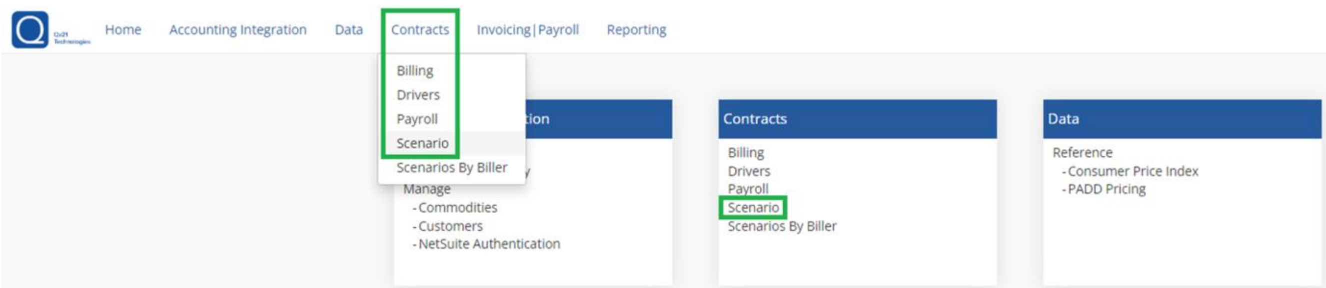
   Note that invoices must be in Open status before regenerating.



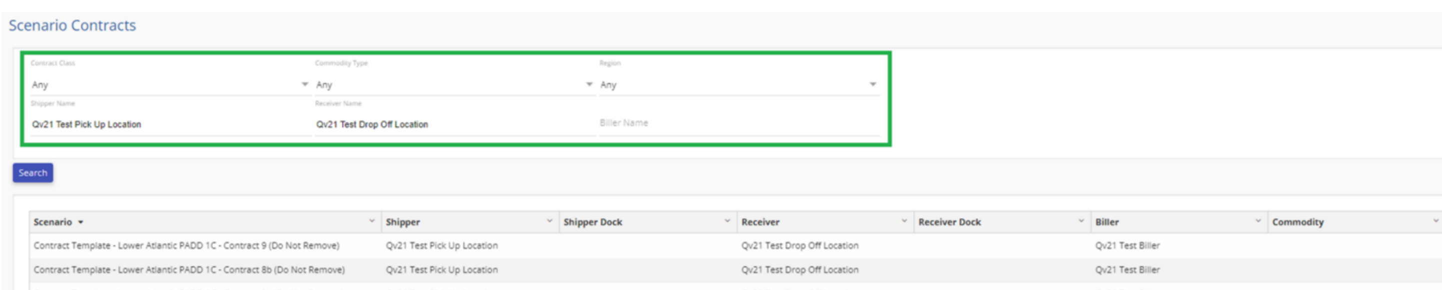
8. Once the status has been adjusted, export the invoice using the arrow icon in the upper-right corner of the page. This can also be done by using the multi-select on the Rating and Invoicing page to export multiple invoices simultaneously.

Adjusting the Invoice Rates

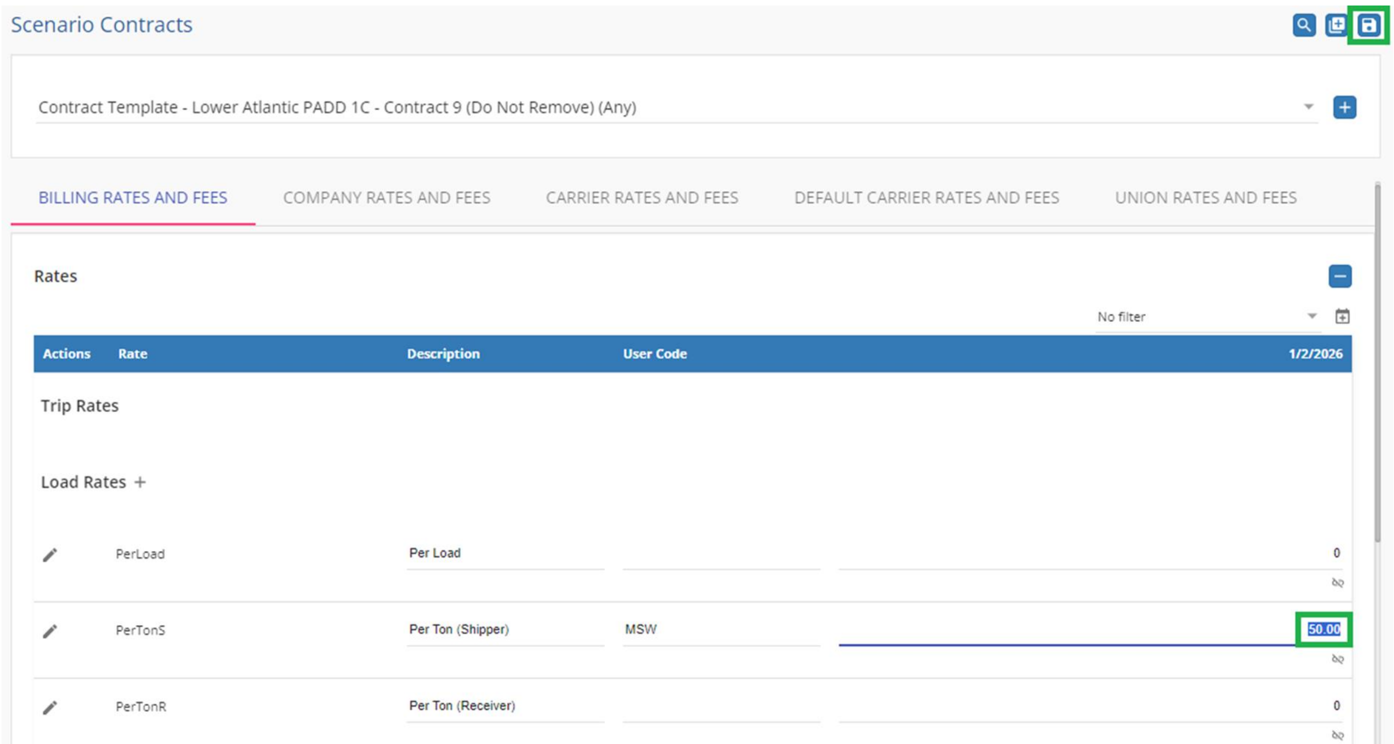
If the rates do need to be adjusted, this can be done in the contract by selecting the Scenario option under the Contracts dropdown or on the Contract tile on the homepage.



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



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.



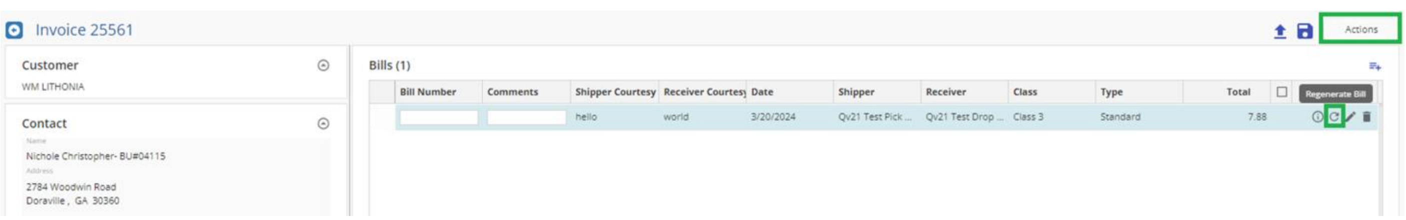
Once the scenario contract's rates have been adjusted, update the jobs in the invoice with the new rates by regenerating. The process of invoice regeneration recalculates all loads in the invoice with the most current rates.

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.



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