



Qv21
Technologies

2024

Introduction to Driver Payroll



eimear bridges

Version 1.1



Introduction to Driver Payroll – Table of Contents

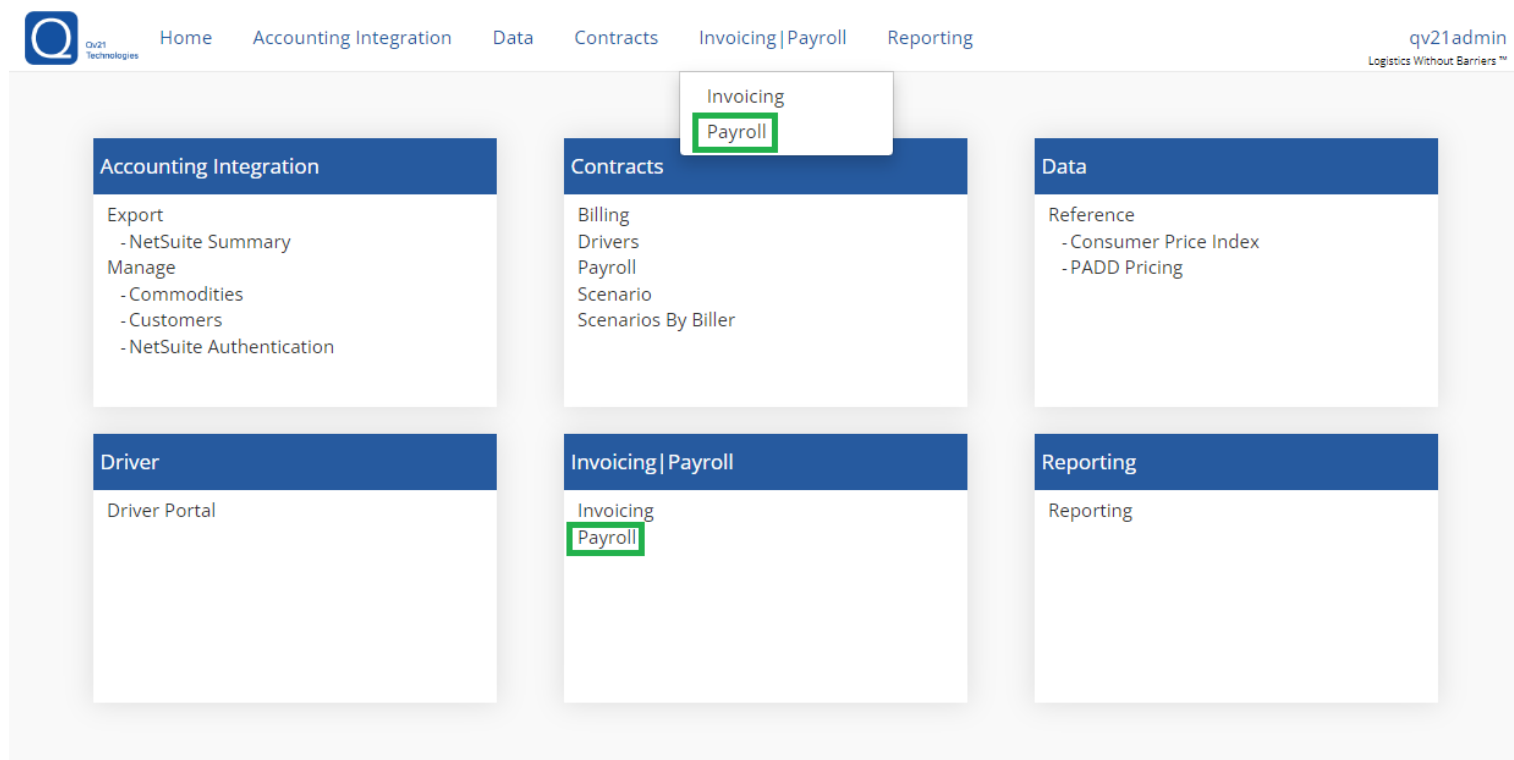
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Accessing Driver Payroll

After login, users will be greeted by the Home page.

To access Driver Payroll, select Payroll under the Invoicing|Payroll category dropdown or hover over the Invoicing|Payroll tab from any window in our online module for the same option.





Driver Payroll

The Driver Payroll page consists of three components:

The screenshot displays the 'Execute Payroll' page in the Qv21 Technologies system. The page features a navigation bar with links to Home, Accounting Integration, Data, Contracts, Invoicing|Payroll, and Reporting. The user is logged in as 'qv21admin'. The page is divided into three main sections, each highlighted with a green box and a number:

- Pay Period Management:** A search bar labeled 'Pay Period' with the date range '02/25/2024 - 03/02/2024' and a magnifying glass icon. This section is labeled with a green '1'.
- Payroll Run Actions:** A toolbar containing icons for adding, deleting, and refreshing data. This section is labeled with a green '2'.
- Existing Payroll Runs:** A table with columns: Group Run, Payroll Run, Terminal, Carrier, Status, Drivers, Load Count, Total, and Action. This section is labeled with a green '3'.

1. Pay Period Management – Allows users to determine the pay dates for payroll or reference other payroll records.
2. Payroll Run Actions – Allow the user to adjust a created payroll run or create new ones.
3. Existing Payroll Runs – Shows the payroll run and an overview of its information. Note the Action column on the far right, which allows users to interact with an individual payroll run.



Executing payroll is generally performed using the following steps:

- Create a pay period for the date range desired for payroll
- Create a record of rated loads (called a payroll run)
- Produce settlement sheets or export to external software

Pay Period Management

The upper-left corner of the Driver Payroll window allows users to select the dates they wish to use to create a payroll run. They can also reference other pay periods users have created, whether for the past or future. These pay period dates determine the start and end dates for the payroll runs contained within.

Selecting a pay period allows users to view all of the payroll runs created within its date range. The pay periods that appear in this list are shown using a 30-day lookback by default, but other runs can be referenced using the magnifying glass icon beside the list.

Execute Payroll

Pay Period

03/18/2024 - 03/24/2024

Pay Period

03/18/2024 - 03/24/2024

03/10/2024 - 03/17/2024

03/03/2024 - 03/09/2024

Execute Payroll

Pay Period

02/21/2023 - 02/22/2023

Group Run	Payroll Run	Terminal	Carrier	Status	Drivers	Load Count	Total	Action
No Group				Open	3	8	\$761.08	
	Feb 21 22			Open	3	8	\$761.08	
Driver Id	First Name	Last Name	Invoice Id	Load Count	Total			
18469	Alex	Morales	5963	1	\$259.00			
18516	Jeff	Pizana	5962	1	\$69.00			
18517	Demo	Driver	5965	6	\$433.08			



Selecting the magnifying class icon will open a calendar view, enabling the user to create a new pay period, edit the one they are currently viewing, or to search for more pay periods to populate in the list.

Pay Period

Create or Search Pay Period

03/18/2024 - 03/24/2024

NEW PAY PERIOD

EDIT SELECTED PAY PERIOD

SEARCH PAY PERIODS

Start Date: 03/24/2024

End Date: 03/30/2024

S	M	T	W	T	F	S
Mar 2024 >						12
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						
Apr 2024 >						

S	M	T	W	T	F	S
Mar 2024 >						12
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						
Apr 2024 >						

Cancel

Create



Payroll Run Actions

Note these three tools located in the upper-right corner of Execute Payroll:



These 3 buttons are Change Run Status, Refresh Selected Runs, Create Runs

- **Change Run Status**
 - Allows user to set the status of the runs within a pay period to either Open or Closed for their documentation.
- **Refresh Selected Runs**
 - Refreshes runs with most recently authorized information from the desktop software, useful for including freshly authorized jobs after a run was first created. The checkmark column displayed with the payroll runs grants the ability to select them as needed.
- **Create Run**
 - Uses the currently selected pay period to produce a payroll run, by either driver or carrier.
 - If run is executed 'By Driver'
 - Can be Owner Operators or Company Drivers
 - Produces individual invoices for all desired drivers
 - If run is executed 'By Carrier'
 - *Carriers are sub-contracted companies that only Owner Operators work for*
 - Creates a separate, overview invoice for each carrier and groups associated drivers' invoices within

Note that drivers will have individualized invoice information regardless of how the run is executed. The method just determines whether to present the run grouped by carrier company or not.



Creating Payroll Runs

When using the Create Runs action, the Payroll Run Creation window opens:

qv21 admin
Logistics Without Barriers™

Create Runs

Total Action

By Driver

Pay Period: 03/18/2024 - 03/24/2024

BY DRIVER BY CARRIER

Filters

First name

Driver

Region

Terminal

Carrier

Include

☐ Owner Operator ☒ Company

☒ Active ☐ Inactive

Run Name

Run Name

Search ☒ Only include driver that haven't been invoiced for the period Found 2 driver(s).

Driver Id	First Name	Last Name	Class Name	Region	Terminal	Carrier	Load Contract	Hourly Contract
1170	Qv21 Test	Driver	Company	T4 - Alabama	COLLINSVILLE T...			
1774	Testdriver	Testdriver	Company	Bulk Express	BULK MIAMI	Qv21 test		

Cancel Generate Runs

The new payroll run will be created using the dates of the pay period selected by the user. Note that every By Driver payroll run must have a Run Name, and that inactive drivers and ones who already have invoices built for the pay period are not included by default. They can be included if desired, however.

If a driver already has an existing invoice for this period, this will create a new, additional invoice and will not overwrite the previous one.



By Carrier

Pay Period: 11/21/2022 - 11/22/2022

BY DRIVER

BY CARRIER

Filters

Terminal

✓	Carrier Id	Name ▲	Short Name	Region	Terminal
✓	10428	RENTED FRAC TANKS	RENTED FRAC TANKS	SMITHFIELD	OFS
✓	10431	RENTED RECYCLE BOXES	RENTED RECYCLE BOXES	WEST PEAK	Colton
✓	10307	Reynolds Nationwide	Reynolds Nationwide	SMITHFIELD	OFS

When creating payroll runs By Carrier, the user is shown available Carriers to select from. Any combination of Carriers may be utilized, and all drivers under that carrier will have invoices created for them.

Execute Payroll



Pay Period

11/21/2022 - 11/22/2022



☰	☑	Group Run ▲2	Payroll Run	Terminal	Carrier	Status	Drivers ▼	Load Count	Total ▼	Action
☰	☑	No Group				Open	1	2	\$425.00	⋮
☰	☑		Carrier 21 22	OFS	Nestle Inc.	Open	1	2	\$425.00	⋮
		Driver Id ▲	First Name	Last Name	Invoice Id		Load Count	Total		
		18529	Andy	Clark	5881		2	\$425.00		



Viewing Payroll Invoices

10/16/2023 - 10/21/2023 Oct 17 - 21 \$625.48

Payroll 6174 - Open

Driver	Total
Driver, Demo	\$413.03
Hernandez, BJ	\$0.00
Morales, Alex	\$212.45

Bill Number	Comments	Date	Shipper	Receiver	Class	Type	Total	Action
		10/18/2023	Austin Transfer	Austin Landfill	msw	Standard	60.44	ⓘ ⌕ ✎ 🗑
		10/18/2023	Austin Transfer	Austin Landfill	msw	Standard	60.54	ⓘ ⌕ ✎ 🗑
		10/18/2023	Austin Transfer	Austin Landfill	msw	Standard	60.75	ⓘ ⌕ ✎ 🗑

10/16/2023 - 10/21/2023 Oct 17 - 21 \$625.48

Payroll 6171 - Open

1

Driver	Total
Driver, Demo	\$212.45
Hernandez, BJ	\$0.00
Morales, Alex	\$413.03

2

3

Details

Payroll Id

Date

10/21/23

Status

Open

Terms

Attachments

Click or Drop files here

Bill Number	Comments	Date	Shipper	Receiver	Class	Type	Total	Action
		10/18/2023	Austin Transfer	Austin Landfill	msw	Standard	60.44	ⓘ ⌕ ✎ 🗑
		10/18/2023	Austin Transfer	Austin Landfill	msw	Standard	60.54	ⓘ ⌕ ✎ 🗑
		10/18/2023	Austin Transfer	Austin Landfill	msw	Standard	60.75	ⓘ ⌕ ✎ 🗑

4

When viewing either a Carrier invoice or payroll run, all driver invoices within can be individually examined. Selecting a driver from the list on the left will open their corresponding payroll invoice. In addition to the viewing loads, the user has various tools at their disposal:

1. **Payroll Invoice Actions** – Allows the user to add drivers to the Carrier invoice, regenerate invoices for selected drivers or email the Settlement Sheet to selected drivers.
2. **Invoice Details** – Displays information about the individual invoice and allows for the adjustments of the invoice status and for relevant attachments.
3. **General Invoice Actions** – Enables the user to save, delete, export, or apply adjustments to the invoice.
4. **Ticket Actions** – Allows for editing, deletion, and regeneration of individual items on an invoice. Regenerating the bills or invoices will update them with the latest rates in the scenario contracts.



Payroll Invoice Actions

On the payroll invoice page, above the list of drivers contained within an invoice are three buttons that allow the user to interact with the driver list.

  			
☐	Driver	Total	
☐	Boatwright, Theo...	\$607.31	
☒	Butts, Troy	\$1,078.00	

These 3 buttons are Email Report to Selected Drivers, Add Drivers, and Regenerate

Note that the checkmark can be clicked beside each driver to select them to receive their settlements sheets through email or to regenerate their invoices. Clicking the box at the top of the checkmark column will instead select all drivers in the invoice and will deselect them all if clicked again.

To utilize the Email Report to Selected Drivers feature, a settlement report must first be created and configured for use with this feature. Once our engineers have set the feature up, using this action will send the settlement sheets to any driver selected using the checkmarks.

Add Drivers will return you to the invoice creation window to add individuals to the invoice.

3/18/2024 - 3/24/2024

First name

Last Name

Region

Terminal

Carrier

Include

☒ Owner Operator

☒ Company

☒ Active

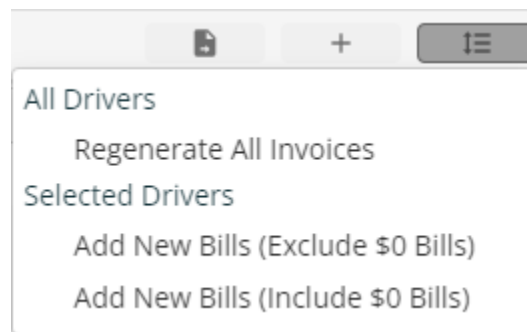
☐ Inactive

Search



The Regenerate button will offer multiple options when clicked on. From this menu, the user can regenerate all driver invoices, or update existing invoices instead.

Regenerating an invoice recalculates all its tickets with the latest rates and adds any new loads Authorized within the time frame. Note that only the Regenerate All Invoices option will perform a regeneration, whereas the Add New Bills option will update existing invoices with new loads without regenerating existing ones.



- Regenerate All Invoices – regenerates all driver invoices in the run or invoice being viewed.
- Add New Bills (Exclude \$0 Bills) – adds newly Authorized tickets that fit within the time frame to selected driver invoices, excluding \$0 tickets.
- Add New Bills (Include \$0 Bills) – updates selected driver invoices with newly Authorized tickets that fit within the time frame, including \$0 tickets.



Invoice Status and Information

Displays information about the individual invoice and allows for the adjustments of its status and for relevant attachments.

The screenshot shows a web interface for managing an invoice titled 'Payroll 25693 - Open'. At the top, there are three action buttons: a list icon, a save icon, and a delete icon. Below this is a tabbed interface with 'Details' and 'Attachments' tabs. The 'Details' tab is active, showing fields for 'Payroll Id', 'Date' (set to 3/24/24), 'Status' (set to Open), and 'Terms'. The 'Attachments' tab is also visible, showing a dashed box with the text 'Click or Drop files here'.

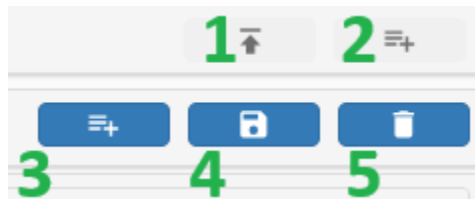
- Payroll ID – Allows the user to assign their own Payroll ID value to the invoice.
- Status – Allows the user to place the invoice in a particular status for documentation:
 - Open, Validated, Closed, Factored, Paid
 - **Note that invoices can only be regenerated in Open status.**
- Date – Allows the user to set the date this payroll run was officially invoiced.
- Terms – An optional field for documenting pay conditions that reporting can reference.
- Attachments – Enables the user to attach relevant documentation or files to the invoice.



General Invoice Actions

Enables the user to save, delete, export, or apply adjustments to the invoice.

At the upper-right corner of the payroll invoice page are general invoice actions, which also appear on the invoicing pages.



These 5 buttons are Send to External System, Add Mass Adjustment, Add Adjustment, Save Invoice, Delete Invoice

1. Send to External System – Exports the invoice to external software configured to Qv21.
2. Add Mass Adjustment – Adds desired adjustments to all invoices in the run (like holiday pay).
3. Add Adjustment – Adds desired adjustment only to the invoice being viewed.
4. Save Invoice – Saves any changes in the invoice and updates the invoice report to the latest.
5. Delete Invoice – Deletes only the invoice being viewed and makes its loads available for invoicing again.



Editing a Payable Item

When adding an adjustment or editing a bill line, the Edit Payable Item window opens.

Edit Payable Item ← →

Info

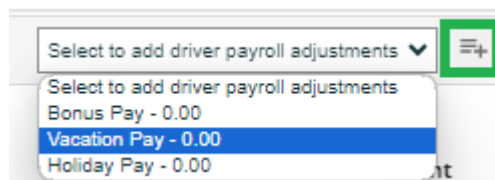
Identifier ☐ Approved

Item Lines Select to add driver payroll adjustments

Description	Pay Code	Quantity	Rate	Amount
☐ ☐ Freight (Flat)	FreightCO	1	10	10.00
☐ ☐ Freight (Per Barrel)	FreightCO	205.73832	0.1	20.57
Sub Total				30.57
State Tax				0
Grand Total				30.57

The Info Section

- Identifier – An optional alternate identifier for the individual bill.
- Approved – An optional field to document that the bill was approved, notes the date approved.
- Rerouted Miles – An optional field that refers to the contract and regenerates bills if data is entered.
- Billed Rerouted Miles – Another optional field which refers to the contract and regenerates bills if data is entered.



The Item Lines

- Add Driver Payroll Adjustments – add adjustments defined in the Driver profiles.
- Add Adjustment Line – Indicated by the icon above, adds a blank line to the bill being edited.
- Description – Describes the purpose of the bill.
- Pay Code – A code used to help external software recognize the purpose of the bill and are stored in the scenario contracts.
- Quantity – The multiplier that is being rated against, usually the load quantity or 1 for a flat fee.
- Rate – The value of the rates being applied, referenced from the scenario contracts.
- Amount – The calculated total of the rates being applied.



Ticket Actions

To the right of an invoice's loads is the Ticket Actions column, which enables users to interact with the bill produced by individual tickets on an invoice.

Date	Shipper	Receiver	Class	Type	Total	☐	Action
4/3/2024	Sorenson 14-6H	Permian 1	Oil	Standard	32.00		   

These 4 buttons are Explanation, Regenerate Bill, Edit Bill, Delete Bill

- Explanation – Shows a technical breakdown of each rate calculation within the bill.
- Regenerate Bill – Regenerates the individual bill with the latest rates in scenario contracts.
- Edit Bill – View the individual ticket's bill breakdown, opening the Edit Payable Item window.
- Delete Bill – Deletes the ticket off the invoice, making it available to be invoiced again.

Note that deleting a ticket in the desktop software deletes it altogether.



Pre-Defined Adjustments and Excluding Drivers from Payroll

In the Driver profile under the Payroll tab, custom pre-defined adjustments can be configured within the driver record and will appear under the driver's tickets in the Driver Payroll module. Please contact Support@Qv21.com for assistance in adding desired options for this feature.

If the value of the pre-defined adjustment is defined in the Payroll tab of the driver's profile information in the desktop software, that amount will automatically appear for the adjustments when applied to the driver's loads. If the value in the Payroll tab is left at \$0 instead, the user must define the adjustment amount with each use.

Edit Payable Item

Info

Identifier

☐ Approved

Rerouted Miles
12

Billed Rerouted Miles
12

Item Lines

Select to add driver payroll adjustments

Select to add driver payroll adjustments

Bonus Pay - 1.00

Vacation Pay - 2.00

Holiday Pay - 3.00

Description	Pay Code	Quantity			
Freight (Flat)	FreightCO	1	10	10.00	
Freight (Per Barrel)	FreightCO	243.89946	0.1	24.39	
Vacation Pay	Vacation Pay	1	2	2.00	



This can be found in the desktop software by opening the Tools menu in any window, selecting Manage Drivers, opening a driver's profile, and clicking on the Payroll tab.

Note that a setting is also present here to prevent the driver's loads from appearing in Payroll at all.

The screenshot shows two windows from 'The LogisticsFramework™' software. The top window displays the 'Tools' menu, which includes options like 'Manage Users', 'Manage Drivers' (highlighted), 'Manage Customers', 'Manage Scenarios', 'Manage Assets', and 'Manage Maintenance Reports...'. The bottom window, titled 'Edit Driver - Test, Driver', shows the 'Payroll' tab selected in the left sidebar. The main area displays 'Predefined Payroll Adjustments' with a table:

Predefined Payroll Adjustments		
Bonus Pay		\$1.00
Vacation Pay		\$2.00
Holiday Pay		\$3.00

Below the table is a checkbox labeled 'Exclude driver from payroll', which is currently unchecked. A green arrow points to this checkbox. The top right of the window shows the version '5.2.44.0' and the name 'WEST PEAK'.