2024

Introduction to Driver Payroll

eimear bridges

Version 1.1

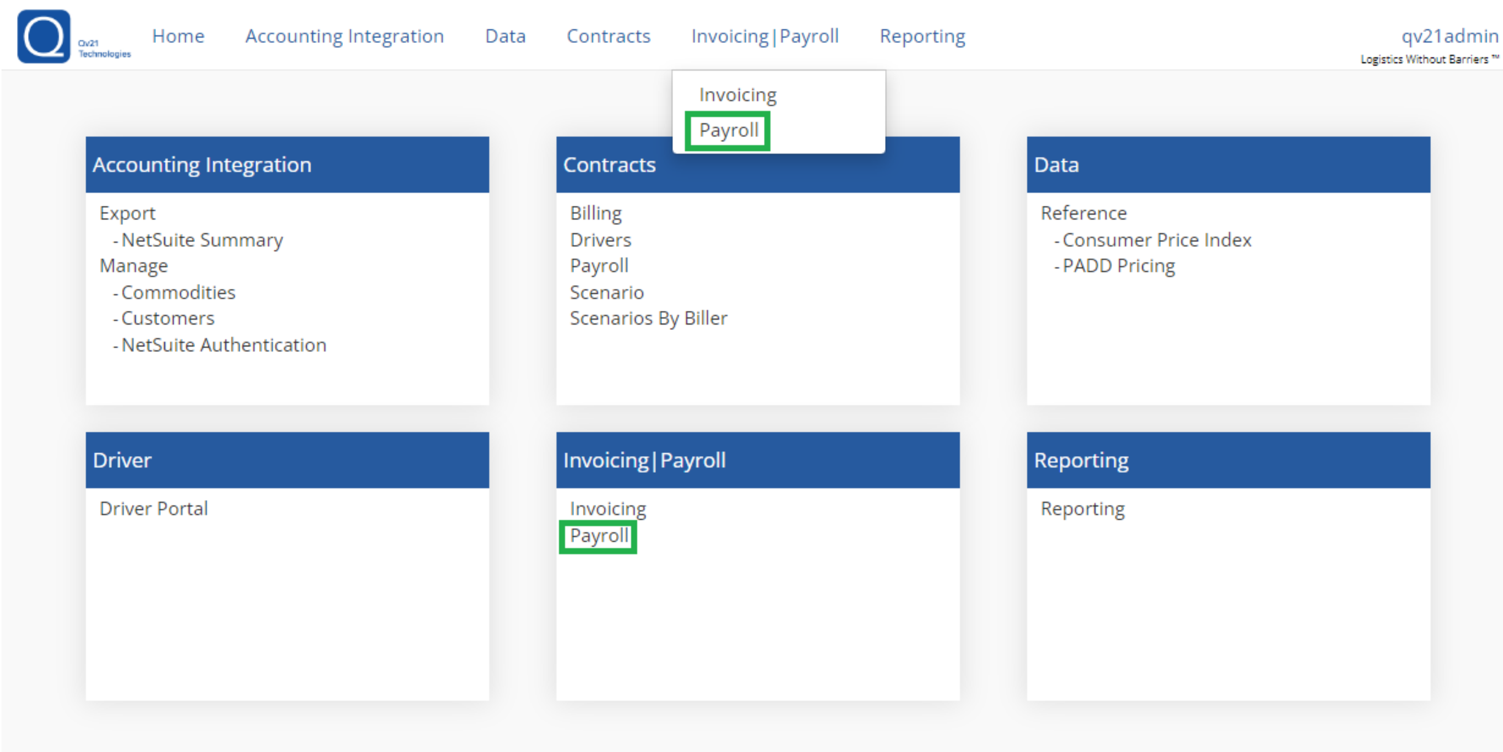
Introduction to Driver Payroll – Table of Contents

Qv21 Technologies, Inc. | 855.853.7821 | info@Qv21.com | 1250 S Capital of Texas Highway, Building 3, Suite 400,

Accessing Driver Payroll

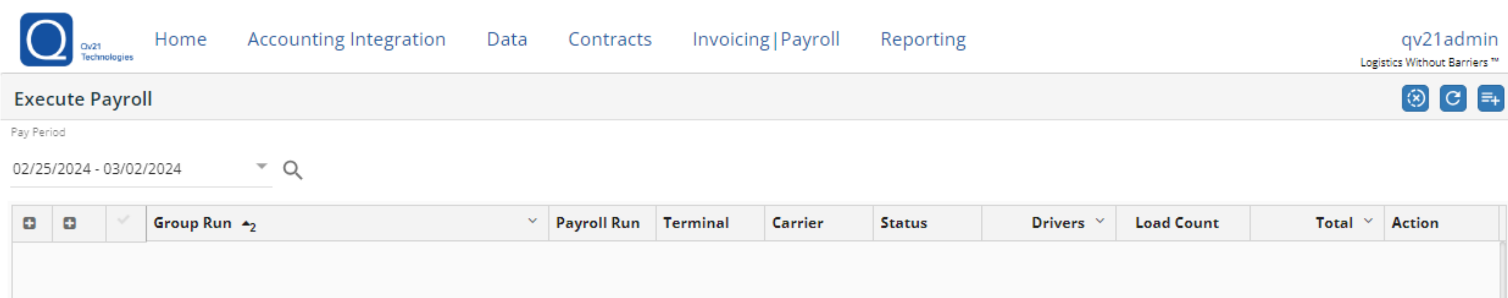
After login, users will be greeted by the Home page.

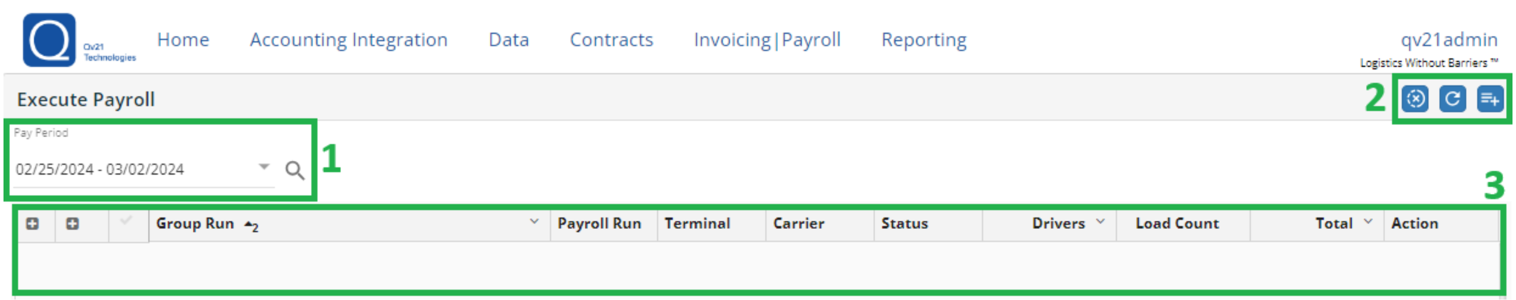
To access Driver Payroll, select Payroll under the Invoicing|Payroll category dropdown or hover over the Invoicing|Payroll tab from any window in our online module for the same option.



Driver Payroll

The Driver Payroll page consists of three components:





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.

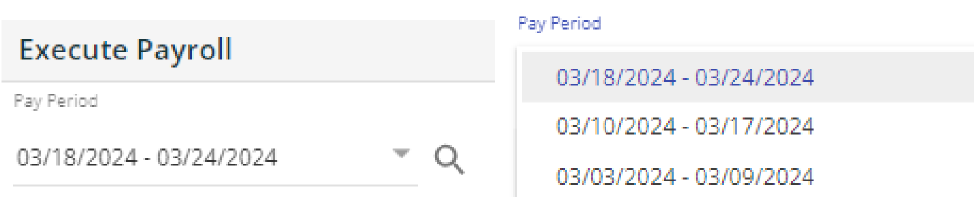
Executing payroll is generally perfomed using the following steps:

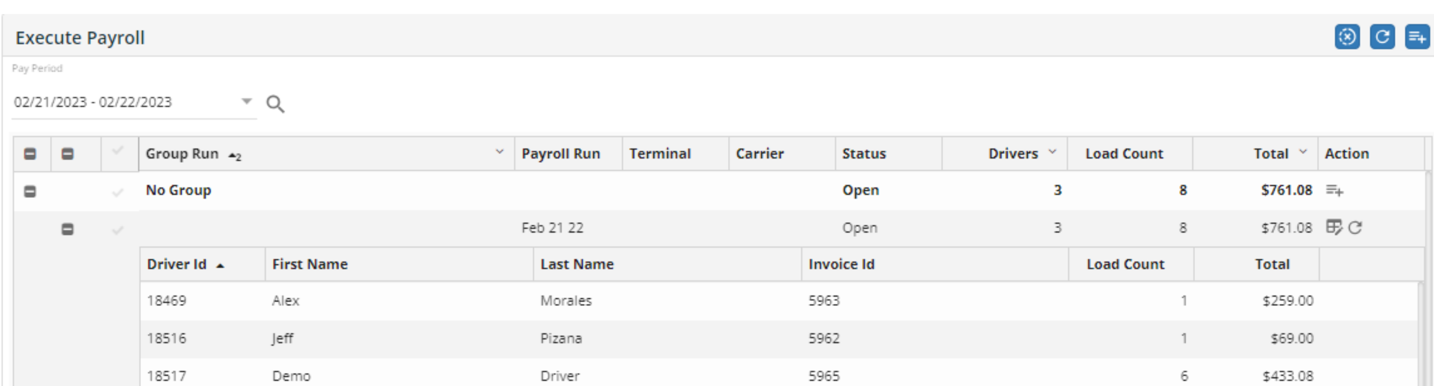
- Create a pay period for the date range desired for payroll
- Create a record of rated loads (called a payroll run)
- Produce settlement sheets or export to external software

Pay Period Management

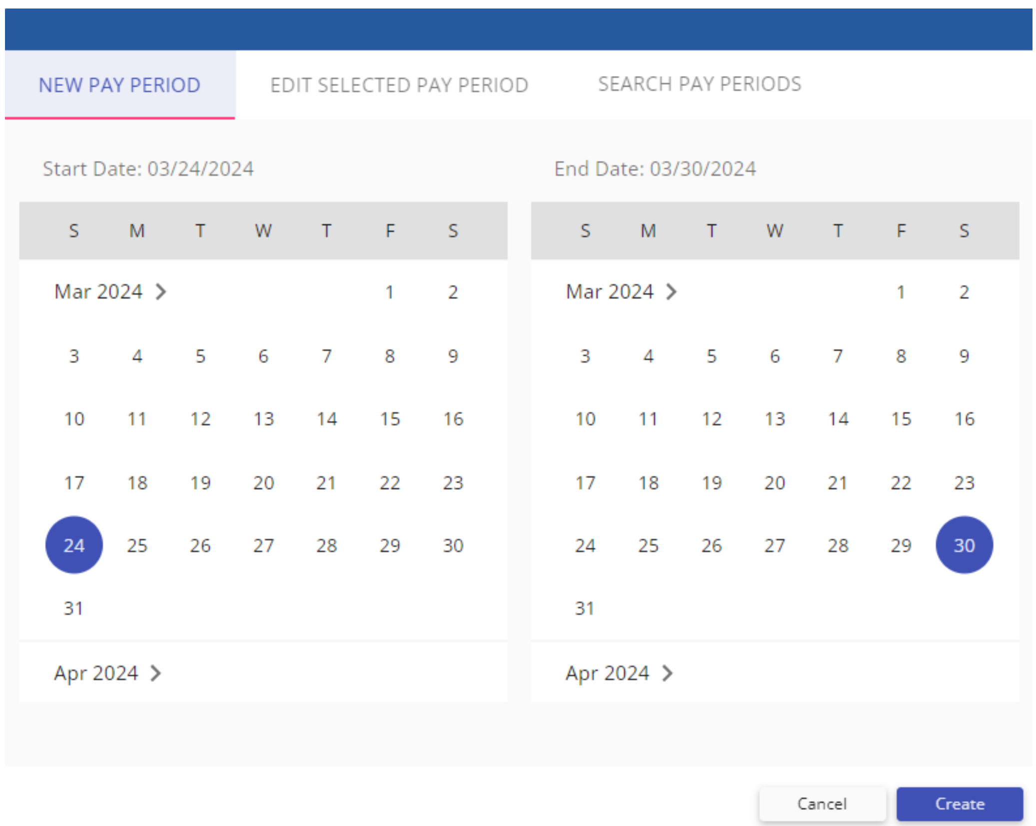
The upper-left corner of the Driver Payroll window allows users to select the dates they wish to use to create a payroll run. They can also reference other pay periods users have created, whether for the past or future. These pay period dates determine the start and end dates for the payroll runs contained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



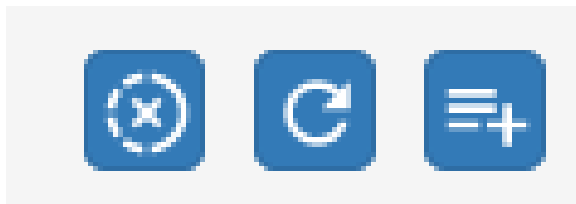


Selecting the magnifying class icon will open a calendar view, enabling the user to create a new pay period, edit the one they are currently viewing, or to search for more pay periods to populate in the list.



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.

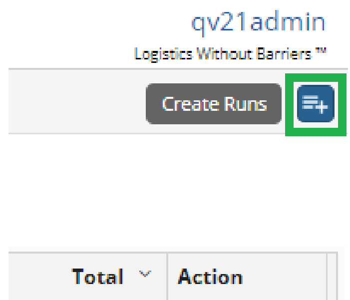
    - If run is executed ‘By Driver’
      - Can be Owner Operators or Company Drivers
      - Produces individual invoices for all desired drivers

    - 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

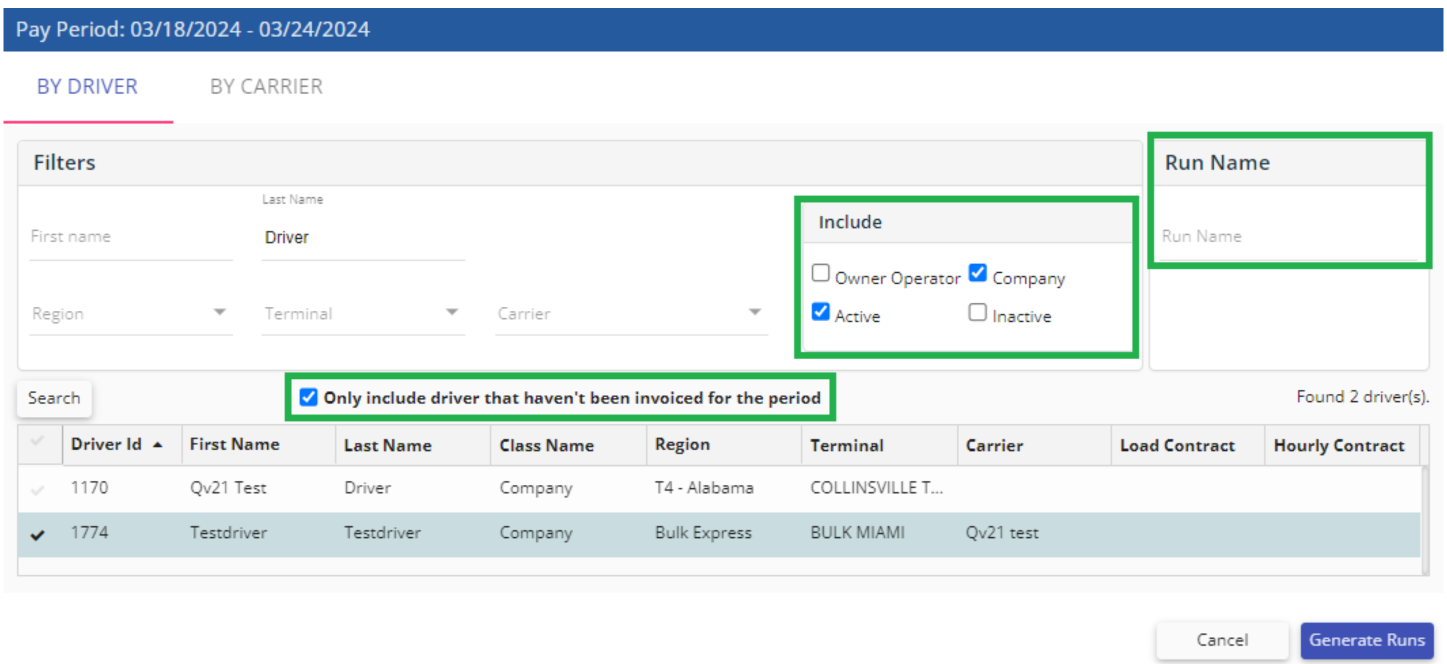
Note that drivers will have individualized invoice information regardless of how the run is executed. The method just determines whether to present the run grouped by carrier company or not.

Creating Payroll Runs

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



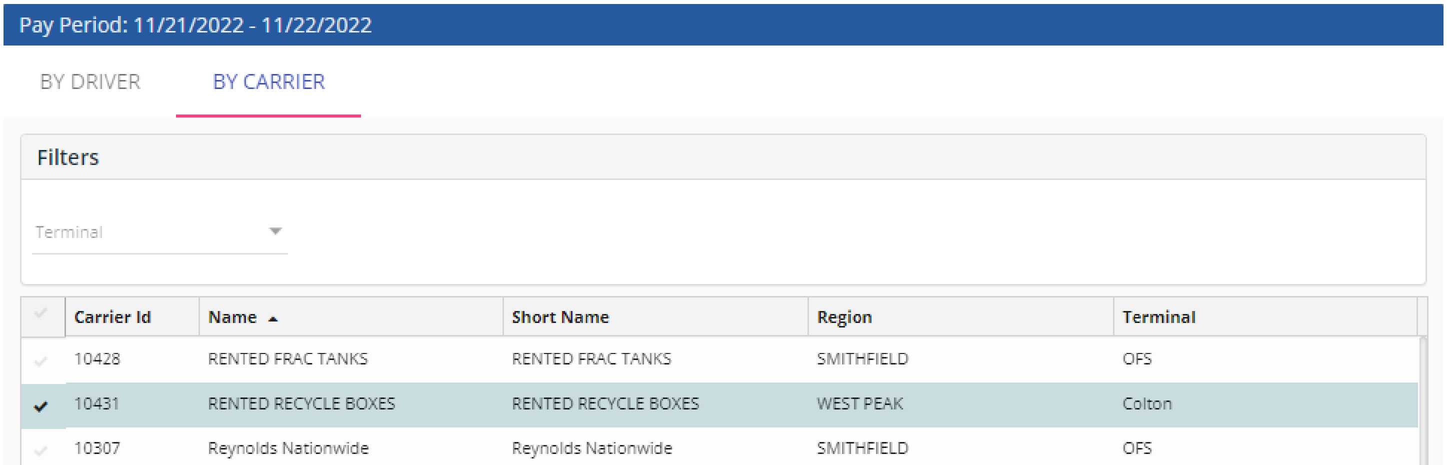
By Driver



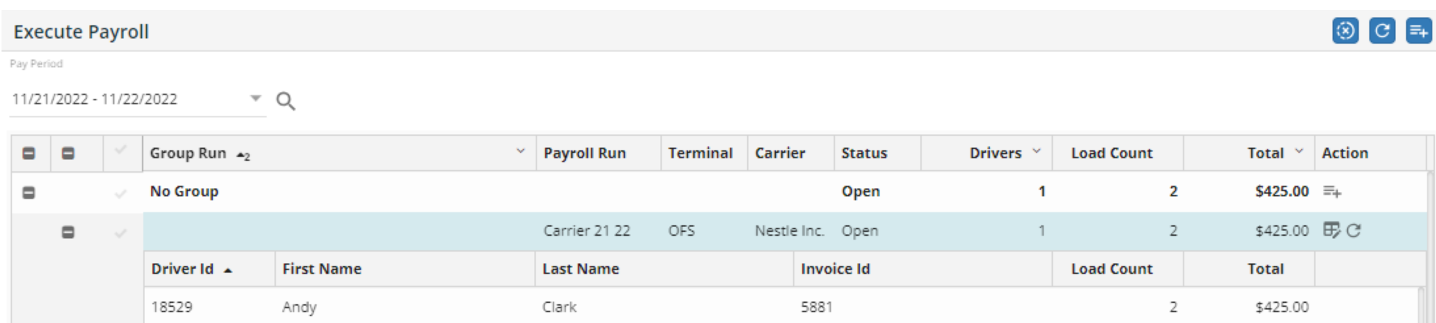
The new payroll run will be created using the dates of the pay period selected by the user. Note that every By Driver payroll run must have a Run Name, and that inactive drivers and ones who already have invoices built for the pay period are not included by default. They can be included if desired, however.

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.

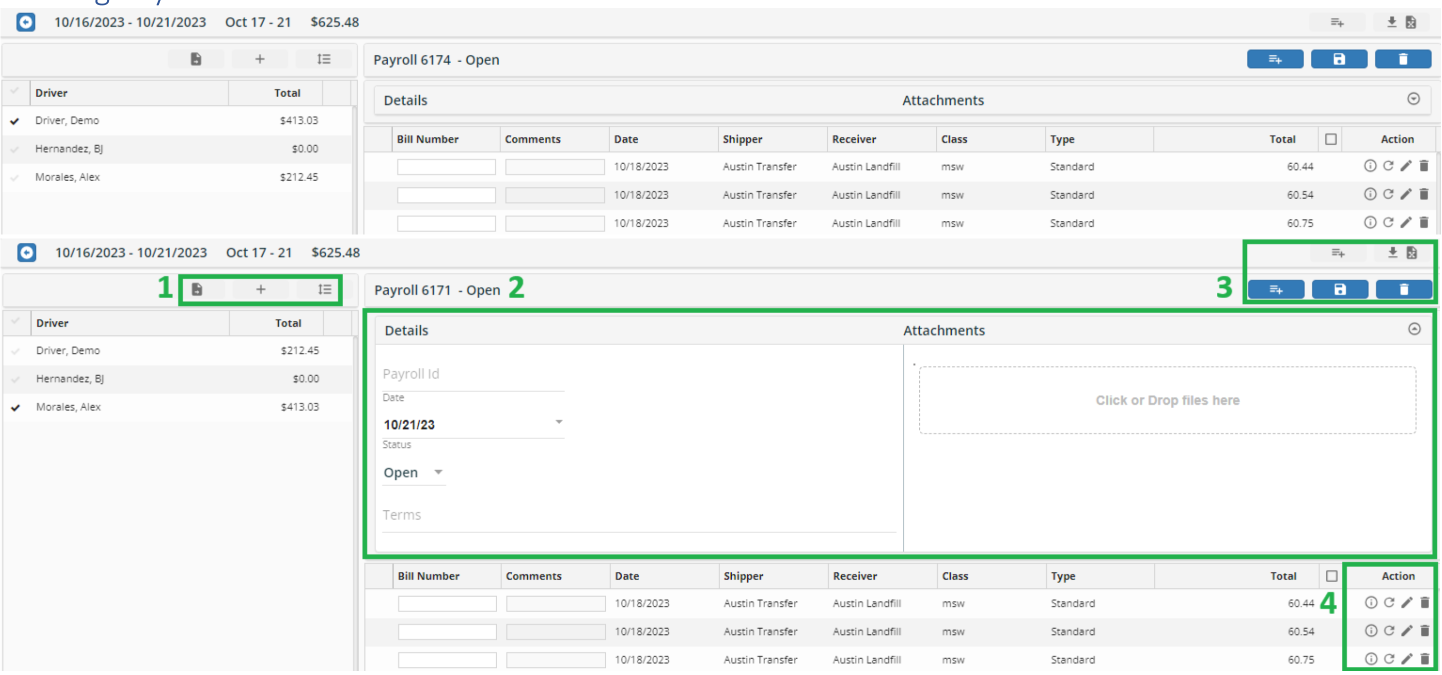
By Carrier



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.



Viewing Payroll Invoices



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.

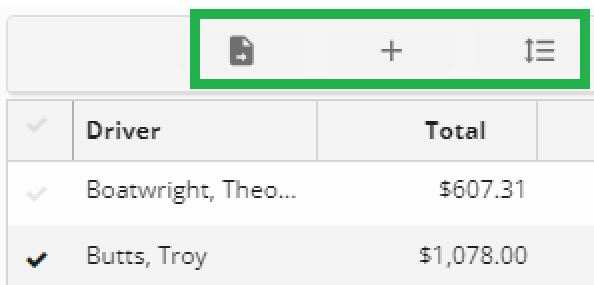
2. **Invoice Details** – Displays information about the individual invoice and allows for the adjustments of the invoice status and for relevant attachments.

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.

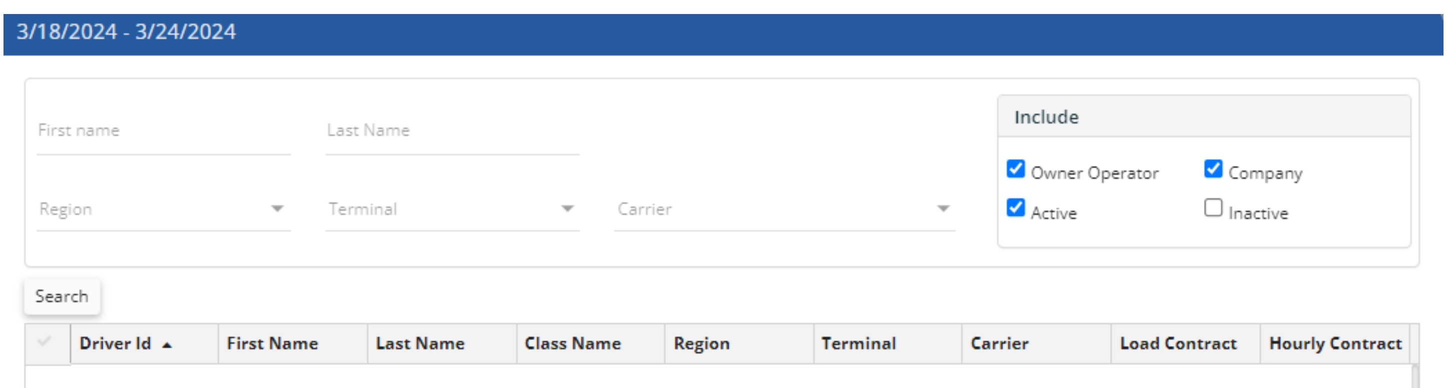


These 3 buttons are Email Report to Selected Drivers, Add Drivers, and Regenerate

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.

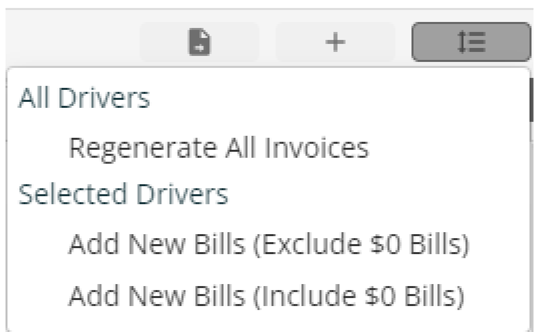
To utilize the Email Report to Selected Drivers feature, a settlement report must first be created and configured for use with this feature. Once our engineers have set the feature up, using this action will send the settlement sheets to any driver selected using the checkmarks.

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



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.

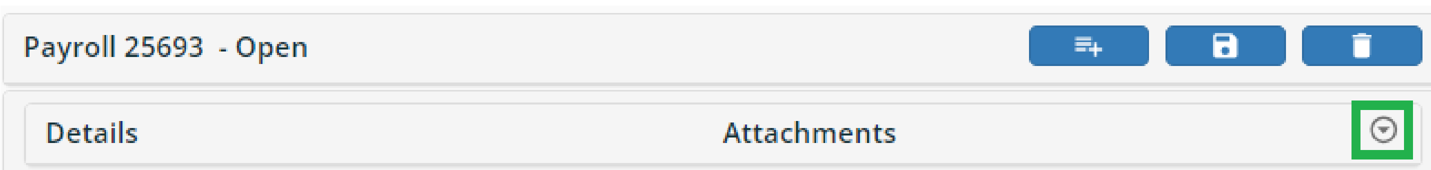
Regenerating an invoice recalculates all its tickets with the latest rates and adds any new loads Authorized within the time frame. Note that only the Regenerate All Invoices option will perform a regeneration, whereas the Add New Bills option will update existing invoices with new loads without regenerating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

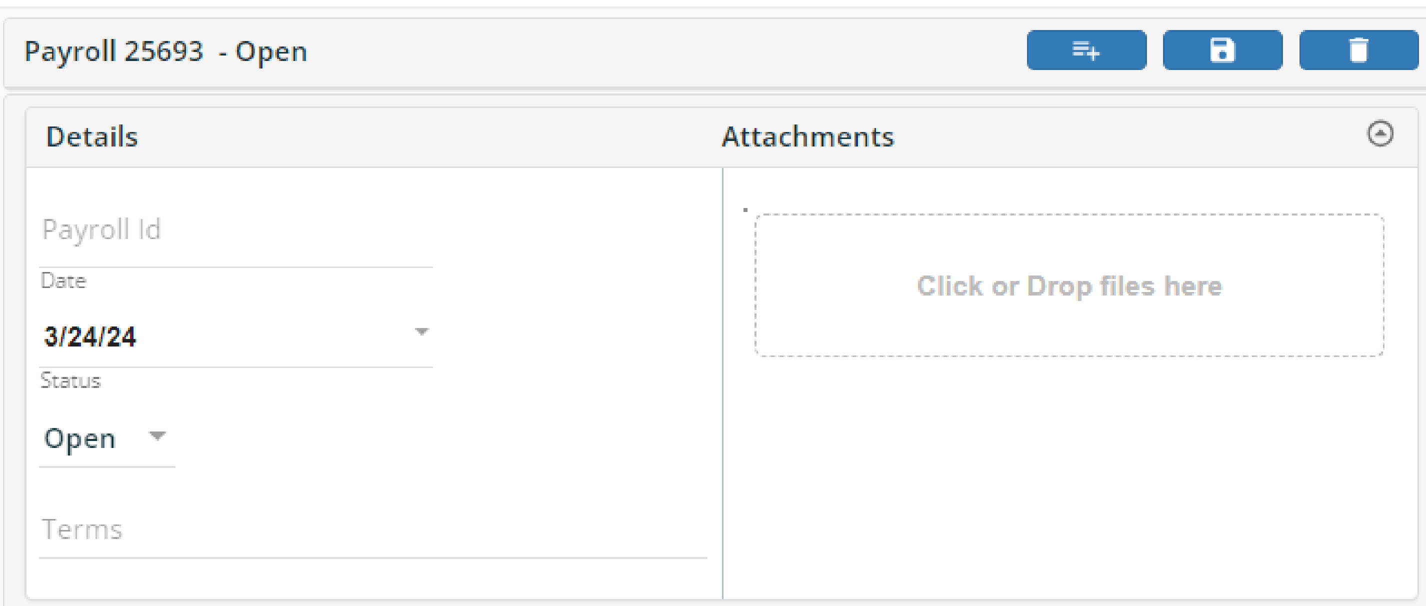


- Regenerate All Invoices – regenerates all driver invoices in the run or invoice being viewed.
- Add New Bills (Exclude $0 Bills) – adds newly Authorized tickets that fit within the time frame to selected driver invoices, excluding $0 tickets.
- Add New Bills (Include $0 Bills) – updates selected driver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





- 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.

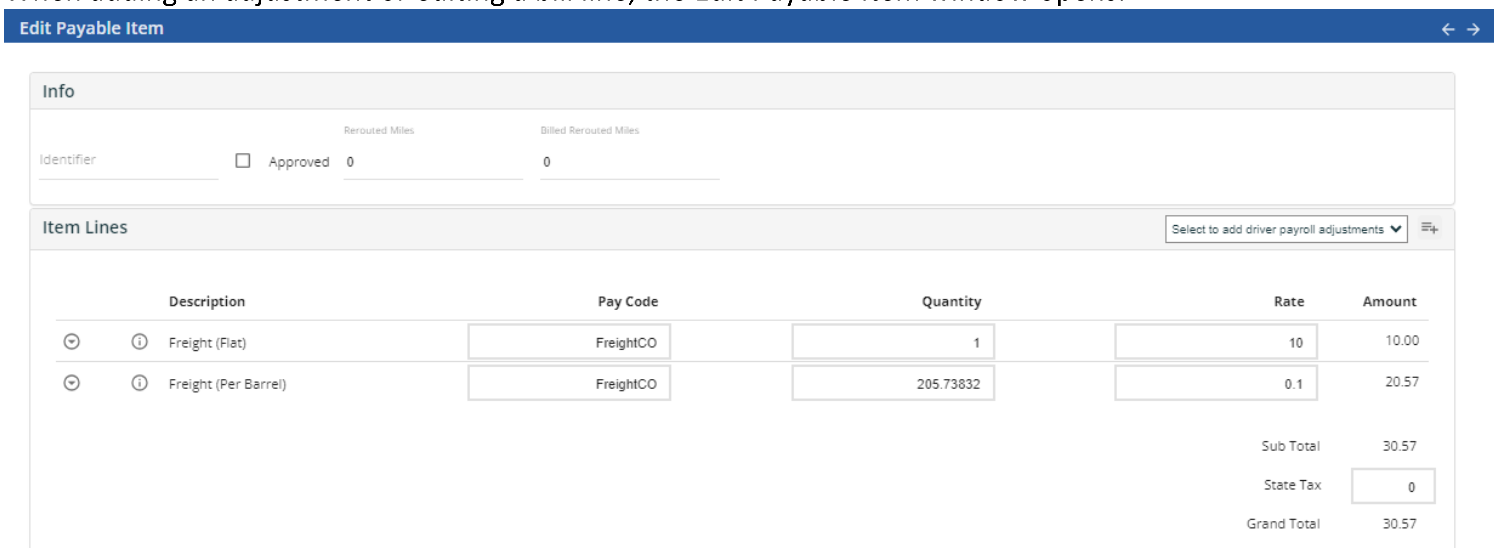
At the upper-right corner of the payroll invoice page are general invoice actions, which also appear on the invoicing pages.

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.

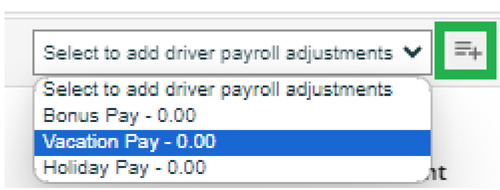
Editing a Payable Item

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



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

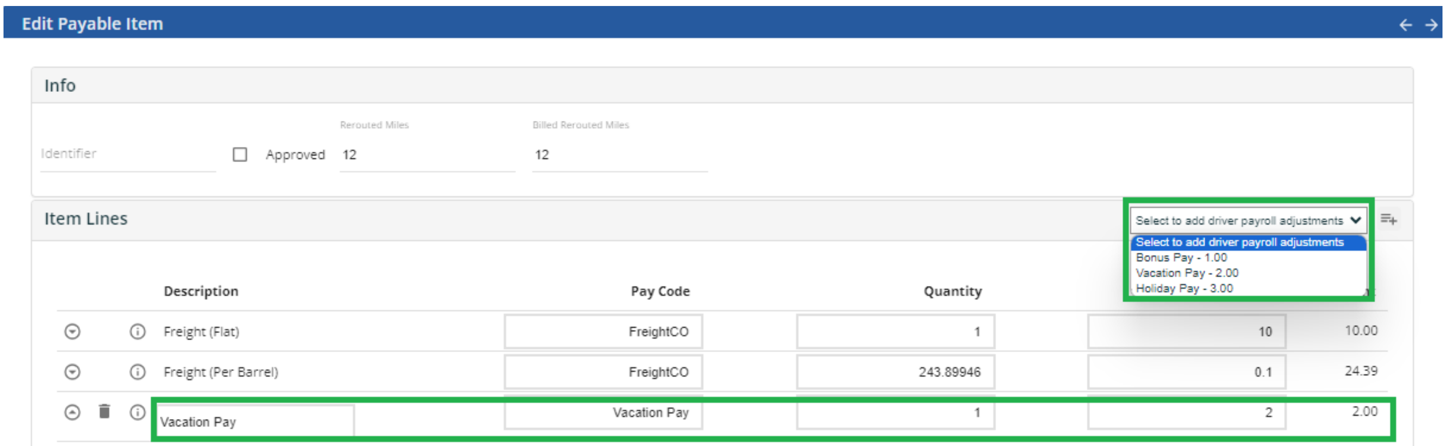
- Explanation – Shows a technical breakdown of each rate calculation within the bill.
- Regenerate Bill – Regenerates the individual bill with the latest rates in scenario contracts.
- Edit Bill – View the individual ticket's bill breakdown, opening the Edit Payable Item window.
- Delete Bill – Deletes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

Qv21 Technologies, Inc. | 855.853.7821 | info@Qv21.com | 1250 S Capital of Texas Highway, Building 3, Suite 400,

Pre-Defined Adjustments and Excluding Drivers from Payroll

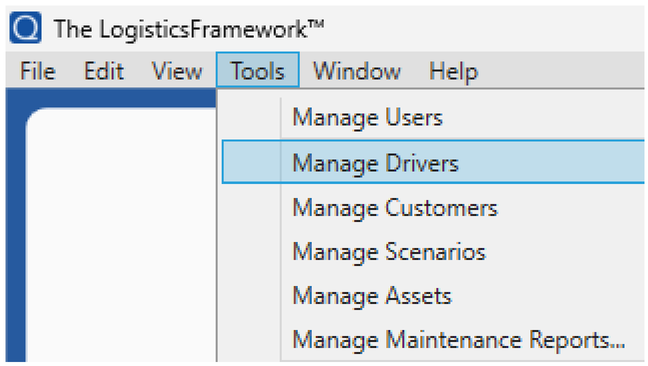
In the Driver profile under the Payroll tab, custom pre-defined adjustments can be configured within the driver record and will appear under the driver's tickets in the Driver Payroll module. Please contact Support@Qv21.com for assistance in adding desired options for this feature.

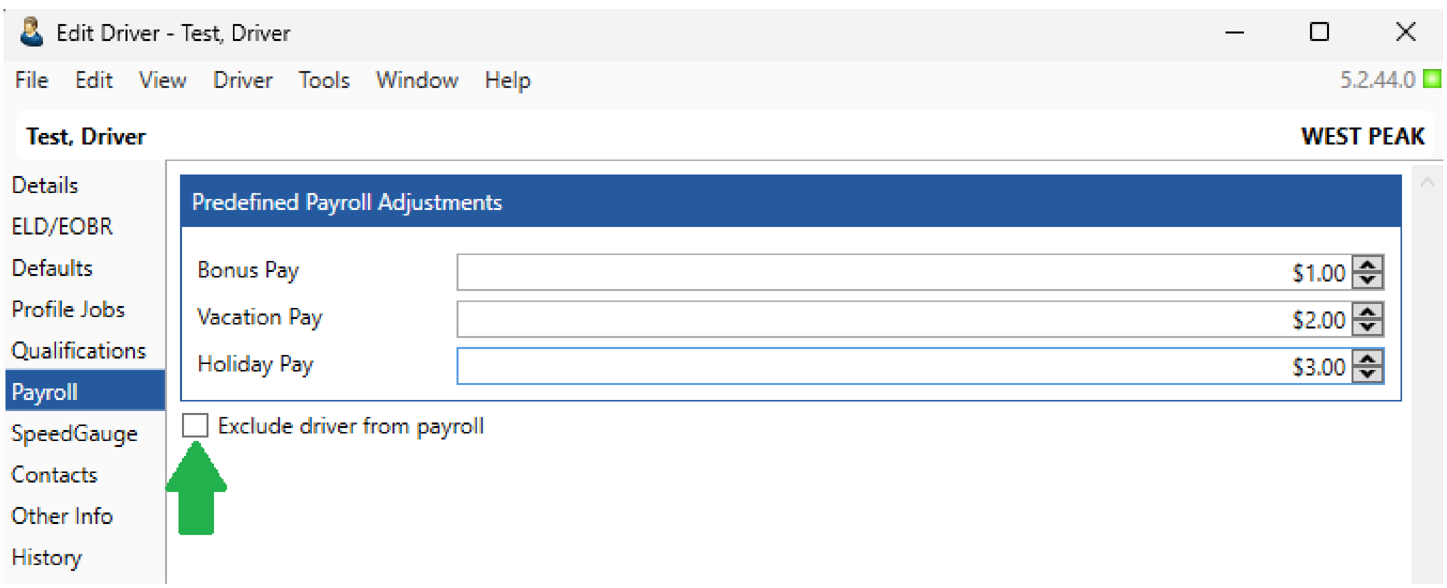
If the value of the pre-defined adjustment is defined in the Payroll tab of the driver's profile information in the desktop software, that amount will automatically appear for the adjustments when applied to the driver's loads. If the value in the Payroll tab is left at $0 instead, the user must define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



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.





Qv21 Technologies, Inc. | 855.853.7821 | info@Qv21.com | 1250 S Capital of Texas Highway, Building 3, Suite 400,
Qv21 Technologies