

strategy

Live!

Totally Internet Based Software

Billing

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Introduction

The billing process in Strategy Live is quick and easy. The steps to billing a load are as follows:

1. Reconcile the loads against trip packs
2. Print the invoices.
3. Transfer invoiced loads to accounting software.

Billing Preparation

To begin the billing process each load must be reconciled. To do so go to Operations> Billing. This will display the Unbilled Loads screen, which lists all of the loads that have not been billed.

Unbilled Loads - Windows Internet Explorer

http://travis.strategylive.net/cgi-bin/billing

Operations Fuel Logs EDI Maintenance Reports Administration Help

Travis Williams Profile Logout

Unbilled Loads

Load Number:

Customer Number: -

Company:

Load Status: Delivered

Search Reset

Number	Co	Customer	Driver/Carrier	Shipper	Appointment	Destination	Bill Amount	Billing Status
100155	01	Mathews Management Company	Tommy Tucker	Dallas, TX		Rogers, AR	1235.50	Not Ready
100153	01	Mathews Management Company	United Transportation	Buffalo, NY		Springdale, AR	4945.50	Not Ready
2							6181.00	

Print Transfer

Click on the number of the load to be reconciled. This will open the Load Information screen. Edit the load information to reflect the appropriate stop information and charges.

When reconciling, the following items should be verified or added:

1. Load Tab: Load Stops, Dates, and Times
2. Charges Tab: Line Haul Rate and Accessorial Charges
3. Pay Tab: Line Haul Pay, Extra Pay Items, Advances, Deductions, and Adjustments

When you have finished entering the appropriate load edits, charges, and settlement information, click the Save button. This will save all changes and return you to the Unbilled Loads screen.

Invoice Printing

Change the Billing Status to Ready to Print on each load that has been reconciled.

Once all of the loads that need to be invoiced are reconciled and the status is changed to Ready to Print, click the Print button to generate the invoices. The invoices will be displayed in a new window using Adobe Reader. You can do a final audit before printing or just click the Print button to print the invoices.

Transfer Invoices

After printing the invoices, the Billing Status will automatically change to Ready to Transfer. To transfer the invoices to your accounting software, simply click the Transfer button.

All loads that were marked Ready to Transfer will be included in the new data file(s). The exported file(s) will be displayed on the screen in a new window so that they can be saved to the desktop. When the file(s) open, click on File and choose Save As.

When the Save Web Page window opens, select the Desktop as the location and either use the automatically assigned name or create your own and then click the Save button.

The file will be saved to the desktop and is ready to be imported into [QuickBooks](#) or [Peachtree Accounting](#).