

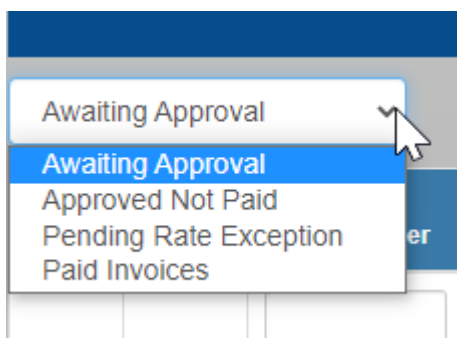
# Carrier Invoice Management

The **Carrier Invoice Management** grid will display Account Payable records automatically for shipments that have a **PRO number** assigned **and** have been updated to **delivered status** using the shipment track function.

<https://help.kuebix.com/wp-content/uploads/2020/12/Kuebix-Carrier-Portal-InvoiceManagement.mp4>

For details on assigning PROs or how to mark a shipment as delivered, please refer to the [Shipment Track video](#) in our carrier portal training series.

In the Carrier Invoice Management grid, there are four statuses for filtering: **Awaiting Approval**, **Approved Not Paid**, **Pending Rate Exception**, and **Paid Invoices**. Click on the drop-down arrow to choose the status you would like to view. When invoices first come into this grid, they are listed under **Awaiting Approval**.



1. To approve the rate for invoicing, there are two required fields:
  - a. **Carrier Invoice Number** and **Carrier Invoice Date**.
  - b. After entering the information in those two fields, click on the Gear icon under the Actions column and then select **Agree to Rate**.

# Carrier Invoice Management

Invoice Management for Kuebix -

Awaiting Approval

Search

| Details | Actions | BOI Number     | AP Reference   | Carrier Pro | Carrier Invoice Number | Carrier Invoice Date | Invoice Total | Original Quote | Paid Amount | Balance To Pay | Payment Due Date | Delivery Date | Load Type | Origin Company       | Destination Company |
|---------|---------|----------------|----------------|-------------|------------------------|----------------------|---------------|----------------|-------------|----------------|------------------|---------------|-----------|----------------------|---------------------|
|         |         |                |                |             |                        | mm/dd/yyyy           |               |                |             |                | mm/dd/yyyy       | mm/dd/yyyy    |           |                      |                     |
|         |         | KBX-0696234-20 | AP-00397243-20 |             | 123456                 | 11/11/2020           | \$ 0.00       | \$ 1250.00     | \$ 0.00     | \$ 1250.00     |                  |               | TL        | Kuebix - Sloppy Joes | Arlington Company   |
|         |         |                |                |             |                        | mm/dd/yyyy           | \$ 0.00       | \$ 85.00       | \$ 0.00     | \$ 85.00       |                  |               | TL        | Kuebix - Sloppy Joes | A Place             |

Agree To Rate

Rate

Agree

c. In the Carrier Invoice pop-up window, click **Agree To Rate**. Before agreeing to the rate, you can add **Comments** here that will be visible to the customer. You can also upload attachments such as the proof of delivery or a copy of the invoice using the **Upload POD/Invoice** button. Neither of those is required to submit a rate approval (unless otherwise noted by the customer).

## 2. To submit a **Rate Exception**:

a. First, add the **Carrier Invoice Number** and **Carrier Invoice Date**.

b. Click on the Gear under the Actions column and select **Rate Exception**.

c. In the pop-up window, you can review the current data for this invoice. Please note that fields marked in red are required and cannot be left blank. Other fields, like the Carrier Contact Name, Carrier Contact Email, and the Comments section are all optional. You can also upload attachments from this panel, but they are not required.

d. Enter a new **Line Haul Charge** and **Fuel Surcharge** in the corresponding fields. Please note that if you do not need to adjust one of these lines, information must still be entered. Simply enter the original data to proceed.

e. To add accessorials that were not included in the original quote, click **Edit Accessorials** and add the required information. Click **Save** if you are done, or **Add Accessorial** if you have additional ones to include.

f. Once all of the information is entered, click **Submit Rate**. This will create a rate exception for your customer to review.

Once an invoice has been approved, it will live in the **Approved Not Paid** status of the

# Carrier Invoice Management

Invoice grid. Please note there is no action required for invoices in Approved Not Paid status.

Submit Rate Exception

AP Reference: AP-00397258-20

Carrier Contact Name:

Carrier Invoice Number: 123456

Carrier Contact Email:

Carrier Invoice Date: 12/11/2020

Comments:

PO List:

| Catagories           | Kuebix & Carrier Rates |                              |                       |
|----------------------|------------------------|------------------------------|-----------------------|
| Rate Details         | Expected Carrier Rates | Invoiced Carrier Rates       | Carrier Rate Variance |
| Linehaul Charge      | \$ 85.00               | <div>\$125.00</div>          | \$ 40.00              |
| Fuel Surcharge (FSC) | \$ 0.00                | <div>\$0.00</div>            | \$ 0.00               |
| Accessorial Charge   | \$ 0.00                | \$ 0.00                      | \$ 0.00               |
| Accessorial Details  |                        | <div>Edit Accessorials</div> |                       |
| Total                | \$ 85.00               | \$ 125.00                    | \$ -40.00             |

Upload POD/Invoice

f

→

Submit Rate

Close

The **Pending Rate Exceptions** status is where invoices with disputed charges reside until the customer approves the new rate.

1. To review details of a specific invoice, click the **Details** button on the far left.
2. To edit information or review customer submissions, click on the Gear icon under the Actions column, and then click **Rate Exception**.

# Carrier Invoice Management

| Pending Rate Exception                                                            |                                                                                   |                |                |             |                        |                      |               |                |             |                |                  |               |           |                       |                     |                                     |  |
|-----------------------------------------------------------------------------------|-----------------------------------------------------------------------------------|----------------|----------------|-------------|------------------------|----------------------|---------------|----------------|-------------|----------------|------------------|---------------|-----------|-----------------------|---------------------|-------------------------------------|--|
| Pending Rate Exception                                                            |                                                                                   |                |                |             |                        |                      |               |                |             |                |                  |               |           | Search                |                     | <input type="text" value="Search"/> |  |
| Details                                                                           | Actions                                                                           | BOL Number     | AP Reference   | Carrier Pro | Carrier Invoice Number | Carrier Invoice Date | Invoice Total | Original Quote | Paid Amount | Balance To Pay | Payment Due Date | Delivery Date | Load Type | Origin Company        | Destination Company |                                     |  |
| 1                                                                                 | 2                                                                                 |                |                |             |                        | mm/dd/yyyy           |               |                |             |                | mm/dd/yyyy       | mm/dd/yyyy    |           |                       |                     |                                     |  |
|  |  | KBX-0696378-20 | AP-00397258-20 |             | 123456                 | 12/10/2020           | \$ 225.00     | \$ 85.00       | \$ 0.00     | \$ 85.00       | 01/09/2021       |               | TL        | Kuebitz - Sloppy Joes | A Place             |                                     |  |

3. Customers can approve the carriers' new rate as shown in the center column (a) or they may dispute the rate via email. The price difference between the original invoice and the rate exception can be found on the right column under the **Carrier Rate Variance** (b). Attachments can also be added here using the **Upload POD/Invoice** button (c), and will need to be identified.

# Carrier Invoice Management

Submit Rate Exception

AP Reference: AP-00397258-20

Carrier Contact Name:

Carrier Invoice Number: 123456

Carrier Contact Email:

Carrier Invoice Date: 12/10/2020

Comments:

PO List:

| Catagories           | Kuebix & Carrier Rates                                                                                                                                             |                                     |                         |  |  |                |           |                                                                                                                                                                   |      |        |                |           |  |
|----------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------|-------------------------|--|--|----------------|-----------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------|------|--------|----------------|-----------|--|
| Rate Details         | Expected Carrier Rates                                                                                                                                             | Invoiced Carrier Rates <sup>a</sup> | Carrier Rate Variance   |  |  |                |           |                                                                                                                                                                   |      |        |                |           |  |
| Linehaul Charge      | \$ 85.00                                                                                                                                                           | <div>\$125.00</div>                 | \$ 40.00                |  |  |                |           |                                                                                                                                                                   |      |        |                |           |  |
| Fuel Surcharge (FSC) | \$ 0.00                                                                                                                                                            | <div>\$0.00</div>                   | \$ 0.00                 |  |  |                |           |                                                                                                                                                                   |      |        |                |           |  |
| Accessorial Charge   | \$ 0.00                                                                                                                                                            | \$ 100.00                           | \$ -100.00              |  |  |                |           |                                                                                                                                                                   |      |        |                |           |  |
| Accessorial Details  | <table><thead><tr><th>Name</th><th>Charge</th></tr></thead><tbody><tr><td colspan="2"></td></tr><tr><td>Over Dimension</td><td>\$ 100.00</td></tr></tbody></table> | Name                                | Charge                  |  |  | Over Dimension | \$ 100.00 | <table><thead><tr><th>Name</th><th>Charge</th></tr></thead><tbody><tr><td>Over Dimension</td><td>\$ 100.00</td></tr></tbody></table> <div>Edit Accessorials</div> | Name | Charge | Over Dimension | \$ 100.00 |  |
| Name                 | Charge                                                                                                                                                             |                                     |                         |  |  |                |           |                                                                                                                                                                   |      |        |                |           |  |
|                      |                                                                                                                                                                    |                                     |                         |  |  |                |           |                                                                                                                                                                   |      |        |                |           |  |
| Over Dimension       | \$ 100.00                                                                                                                                                          |                                     |                         |  |  |                |           |                                                                                                                                                                   |      |        |                |           |  |
| Name                 | Charge                                                                                                                                                             |                                     |                         |  |  |                |           |                                                                                                                                                                   |      |        |                |           |  |
| Over Dimension       | \$ 100.00                                                                                                                                                          |                                     |                         |  |  |                |           |                                                                                                                                                                   |      |        |                |           |  |
|                      |                                                                                                                                                                    |                                     |                         |  |  |                |           |                                                                                                                                                                   |      |        |                |           |  |
|                      |                                                                                                                                                                    |                                     |                         |  |  |                |           |                                                                                                                                                                   |      |        |                |           |  |
| Total                | \$ 85.00                                                                                                                                                           | \$ 225.00                           | \$ -140.00 <sup>b</sup> |  |  |                |           |                                                                                                                                                                   |      |        |                |           |  |

Upload POD/Invoice <sup>c</sup>

Submit Rate

Close

## Carrier Invoice Management

The screenshot shows a modal window titled "Upload Documents" with a close button (X) in the top right corner. The form is divided into several sections:

- File:** A text input field with a "Choose File" button and the text "No file chosen".
- Type:** A dropdown menu that is currently open, showing a list of document types: Customer Approval Form, Bill of Lading, Commercial Invoice, Invoice, Lumper Receipt, Proof of Delivery, Delivery Receipt, Tender, CC Authorization, and Other.
- Description:** A text input field.
- Upload:** A green button next to the description field.
- Close:** A button in the bottom right corner of the modal.
- Footer:** A row of three buttons: "Upload POD/Invoice" (green), "Agree To Rate" (green), and "Cancel" (red).

The background of the application is visible through the modal, showing a table with columns for "Pr", "mm", and "Date". Some data is visible, including "08/02/2021".

Once the invoice is approved by the customer, invoices move to the **Approved Not Paid** status.

The **Paid Invoices** status is where invoices go once approved by both the carrier and the customer. These invoices will remain here indefinitely for your reference and no additional action is required.