

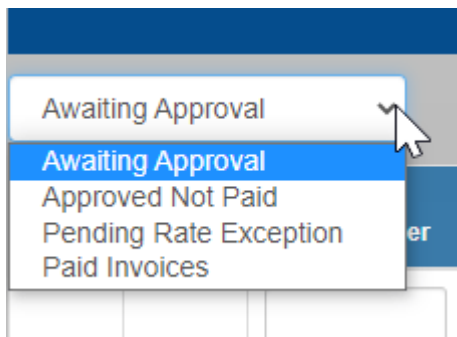
Carrier Invoice Management

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**.

Awaiting Approval															
Awaiting Approval															
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
						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

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 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:

Categories	Kuebix & Carrier Rates		
Rate Details	Expected Carrier Rates	Invoiced Carrier Rates	Carrier Rate Variance
Linehaul Charge	\$ 85.00	\$125.00 d	\$ 40.00
Fuel Surcharge (FSC)	\$ 0.00	\$0.00	\$ 0.00
Accessorial Charge	\$ 0.00	\$ 0.00	\$ 0.00
Accessorial Details		Edit Accessorials e	
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**.

Pending Rate Exception															
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	OriginCompany	DestinationCompany
1	2	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	mm/dd/yyyy <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	mm/dd/yyyy <input type="text"/>	mm/dd/yyyy <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
⚙️		KBX-0698378-20	AP-00397258-20		123456	12/10/2020 <input type="text"/>	\$ 225.00	\$ 85.00	\$ 0.00	\$ 85.00	01/09/2021		TL	Kuebix - 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.

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:

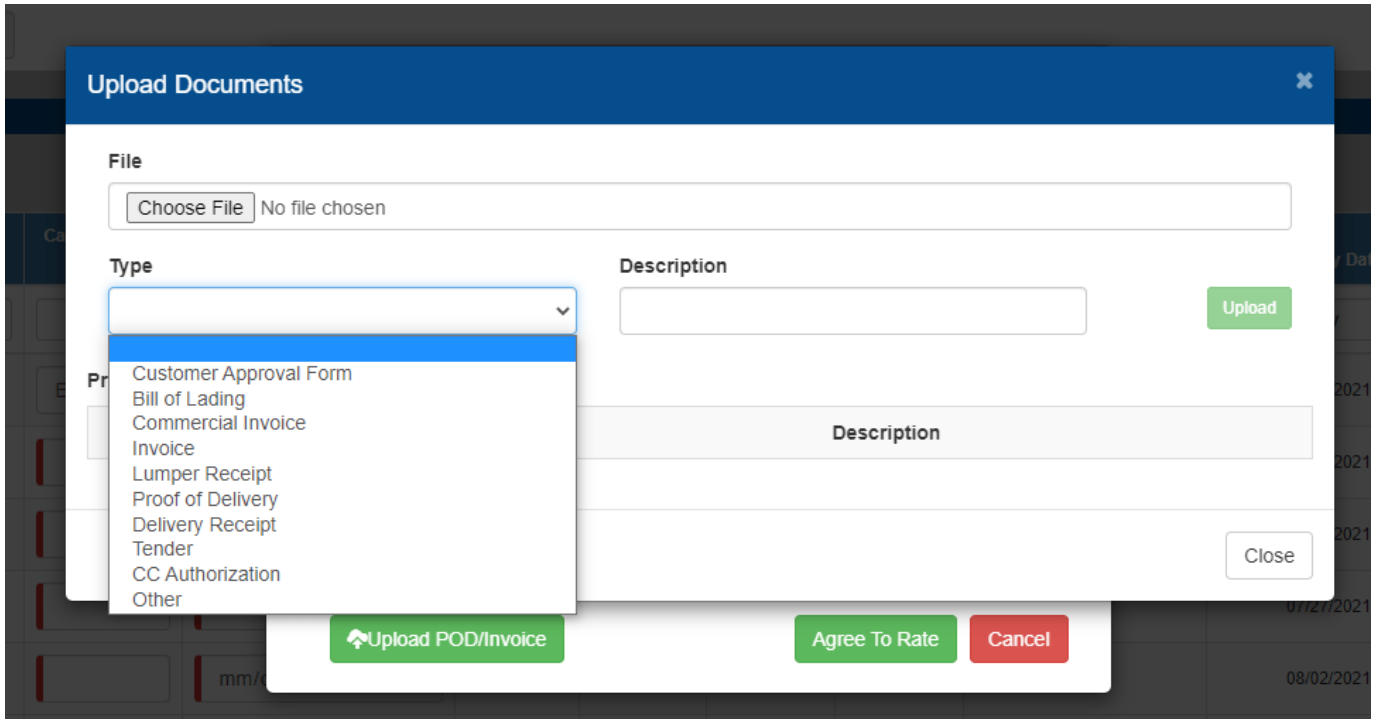
Categories	Kuebix & Carrier Rates		
Rate Details	Expected Carrier Rates	Invoiced Carrier Rates a	Carrier Rate Variance
Linehaul Charge	\$ 85.00	<input style="width: 100%;" type="text" value="\$125.00"/>	\$ 40.00
Fuel Surcharge (FSC)	\$ 0.00	<input style="width: 100%;" type="text" value="\$0.00"/>	\$ 0.00
Accessorial Charge	\$ 0.00	\$ 100.00	\$ -100.00
Accessorial Details	Name	Charge	
	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; text-align: center;">Over Dimension</td> <td style="width: 50%; text-align: center;">\$ 100.00</td> </tr> </table>		
Over Dimension	\$ 100.00		
Total	\$ 85.00	\$ 225.00	\$ -140.00 b

📎 Upload POD/Invoice

c

Submit Rate

Close



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.