

# **TRANSPORT PRO**

Generate and Send a Billing Statement:  
Enterprise

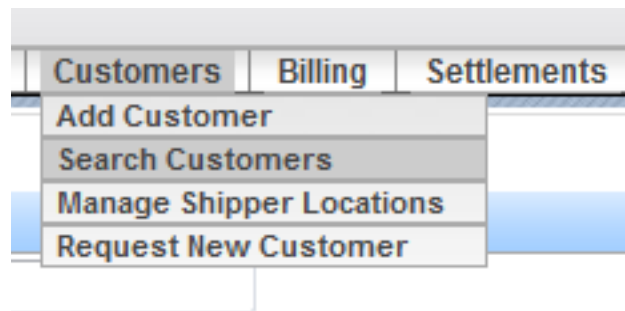
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## Generate and Send a Billing Statement

Transport Pro allows you to generate billing statements and send them to customers by emailing, printing or pushing the statement to the imaging module. When you generate the statements, the system automatically converts the file to a PDF in preparation to bill the customer. Below is a step-by-step guide that shows you how to generate and send a billing statement.

1. Follow the path in the menu Customers>Search Customers.



2. A window will appear that allows you to search for specific customers based on the criteria you filter. Once you enter the desired information, click Search.

Search Customers	
ID	<input type="text"/>
Credit Status	- Select - ▼
Customer Type	- Select - ▼
Payment Method	- Select - ▼
Customer Name	<input type="text"/>
Customer Code	<input type="text"/>
Sales Person	<input type="text"/> 🔍

3. When you click Search, a list of customer accounts will generate. To view details on a specific customer as well as generate and send billing statements, click on the ID link.

[Print Results](#)

ID	Customer Type	Company
<a href="#">1001</a>	bhri	Broker buchanan
<a href="#">1007</a>	131029	Broker CH Robinson
<a href="#">1012</a>	COV	Shipper Covenant Steel
<a href="#">1008</a>		Broker Coyote Logistics LLC
<a href="#">1006</a>		Shipper Gerdau

4. When you click on the ID link, a Customer Summary window will open. Scroll down to the Customer Credit Information section and click on the Generate Billing Statement link.

Customer Credit Information	
Federal ID	
SIC Code	
MC Code	
DUNS Number	
DUNS Exp Date	
Billing Fax Number	
Billing Email	<a href="#">user@domain.com</a>
Billing Statement	<a href="#">Generate Billing Statement</a>
Open Load Balance	\$29,187.11

5. When you click on the Generate Billing Statement link, a drop-down list appears and gives you the option to print, email or push the statement to imaging. Click on your preferred method.

Billing Statement	<a href="#">Generate Billing Statement</a>
Open Load Balance	\$2
Billed Load Balance	\$3
Avg Days To Pay (Load)	0
Misc Invoice Balance	\$0
Avg Days To Pay (Misc Invoice)	0

[Print](#)  
[Email](#)  
[Push to Imaging](#)

**NOTE:** If an email address is entered in the Billing Email field (this field is located in the Customer Credit Information section directly above the “Generate Billing Statement” field), this email address will automatically populate when you choose the Email option. If you choose to email a customer, double check the information and if it is correct, click Send. If you choose to push the statement to imaging, a message will pop up letting you know that the billing statement has been successfully created (bottom figure). Click OK.

**Email Billing Statement**

To: user@domain.com

Attachment: Billing Statement

Message:

Attached to this email, please find the following statement:

Statement date: May 13, 2015

Name: buchanan

Please remit payment to:

Demo Company, Inc  
P.O. Box 12345  
Brentwood, TN 37287  
800-800-5917

Send Cancel

**Credit Rating**


Billing Statement created successfully and can be found with the files below.

OK

Once you click OK, you can find the Billing Statement in the File History section at the bottom of the page.


File History		
File	Index Date	Upload Date
Billing Statement	05/13/2015 10:13	05/13/2015 10:13

**NOTE:** You can also generate and send billing statements by following the path in the menu A/R>Reports>AR Aging Reports. Click on the specific customer you wish to bill.



Customer Name
<a href="#">buchanan - Fort Wayne, IN</a>
<a href="#">CH Robinson - Dover, DE</a>
<a href="#">Keystone Foods Accounting Center - Madison, AL</a>
<a href="#">KK Shipping Plus - Mount Juliet, TN</a>

Once you click on the customer's name, a Customer Information window open. Scroll down and click on the Generate Billing Statement link.



Customer Information	
Website	
Sales Representative	
Customer Service Representative	
Collections Representative	
Billing Statement	<a href="#">Generate Billing Statement</a>
Payment Method	
Load Balance	\$35,775.13
Avg Days To Pay (Load)	0
Misc Invoice Balance	\$0.00
Avg Days To Pay (Misc Invoice)	0
<a href="#">1363</a> - 05/04/2015 - Hendersonville, TN to Arvada, CO	
<a href="#">1327</a> - 04/19/2015 - Mount Juliet, TN to Fort Wayne, IN	

Once you click on the link, the same Print, Email and Push to Imaging options appear in a drop-down list. Choose the desired option.