



# **Master Billing**



## **Table of Contents**

Introduction	3
Create a Master Bill	3
Edit a Master Bill/Re-Bill	e

#### Introduction

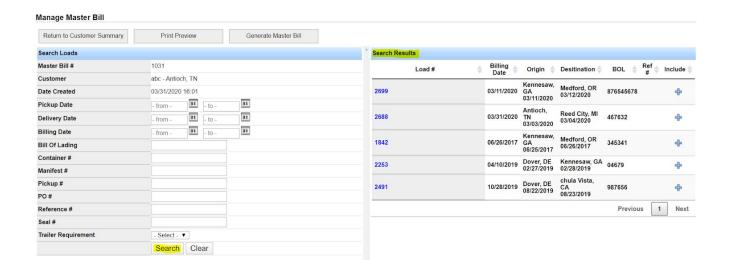
Transport Pro offers a master billing feature, which allows billing users to create and send a single bill that references select invoices, typically per the customer's requirement. This guide details the full functionality of the master billing feature. If you have any questions regarding this tool, please reach out to our technical team at <a href="mailto:support@transportpro.net">support@transportpro.net</a>.

#### Create a Master Bill

To create a master bill for one of your customers, navigate to the desired customer summary screen. Scroll about halfway down the page and you'll see a "Master Billing" section. Click "+Add Master Bill."



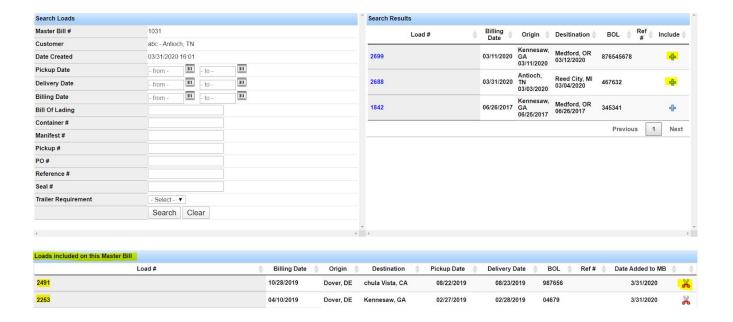
You will be redirected to the "Manage Master Bill" screen, where you can search for the invoices you would like to include on the master bill. You have several filter options, or you can just click "search" to generate a list of all invoices for that customer. Once you click "search" a list of invoices will generate in the "Search Results" section.



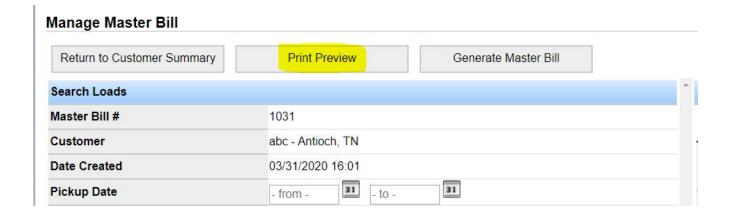


Click the "+" icon out to the right of each invoice you would like to include on the master bill. As you begin to add the invoices, you will see the list of selected loads populate at the bottom of the page.

**NOTE**: If you accidentally click to include an invoice that you don't want to include, you have the option to delete it by clicking the scissor icon.

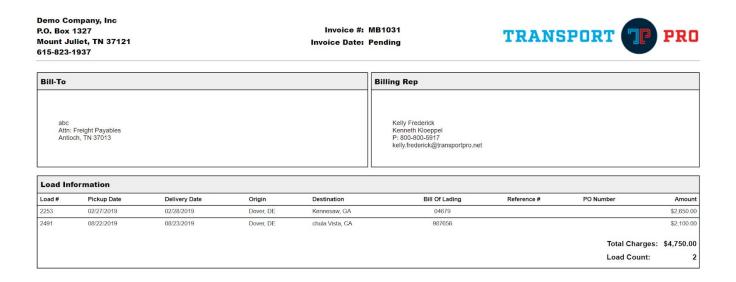


Once you select all of the invoices you wish to include on the master bill, you have the option to preview the master bill before you tell the system to generate the master bill. If you would like to preview a draft of the master bill, click the "Print Preview" tab at the top of the screen.

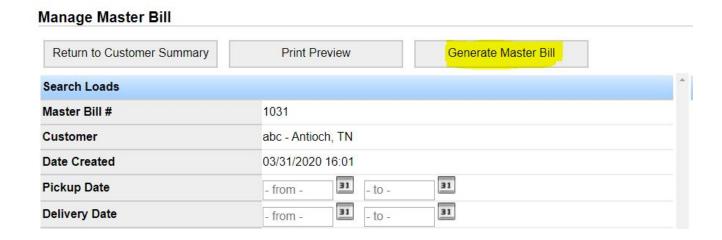




If you click this tab, a new browser tab will open with a preview of the master bill. Review for accuracy.



From here, you can either go back and make edits to the master bill, or if everything looks correct, click the "Generate Master Bill" tab.



When you click this tab, you will receive a pop-up message that asks you if you're sure you want to create the master bill, click ok. The master bill will generate and the system will redirect you back to the customer summary screen.

**NOTE**: You will also notice a "Return to Customer Summary" tab. If you click this tab, you will be redirected back to the customer summary screen, but the system will save the master bill as a draft that you can edit at any time.



After you generate the master bill, you will see this information populated in the "Master Billing" section on the customer summary screen, where you started. You'll be able to view the date created, number of loads on the master bill, total amount, and date billed/created.



When you click to generate the master bill, the system creates the "master billing packet" for you as well, and places this billing packet in the "File History" section of the customer summary screen.

**NOTE**: The first page of this packet is the master bill itself (as shown in the preview screenshot above). The master bill will show the following information for each load referenced: Load #, pickup and delivery dates, origin and destination, bill of lading, reference #, PO #, and amount, along with a total amount and load count at the bottom. The invoice date on the master bill will show as the date that you created the master bill.

The packet will also include all of the required supporting documentation that you have indexed against each load referenced on the master bill. Once the billing packet is created, you can use the management tools out to the right to preview, download, or email it out of the system.



### Edit a Master Bill/Re-Bill

Whether you started the process of creating a master bill and never completed the task, or generated a master bill and then later realized you needed to make some changes and re-bill, you can make changes easily.

You will find any master bill drafts in the "Master Billing" section of the customer summary screen. You will be able to tell it's a draft versus a master bill that you've already generated due to the management tools available. If you've already generated the master bill, then you'll see the lock icon here instead.





If your master bill draft is ready to go, but perhaps you forgot to click to generate the master bill, you can do it from the "Master Billing" section. You'll see a link that says "Generate Master Bill."



You can also click to preview the master bill as a draft before you generate it, edit the master bill, or delete it using the management tools.



If you need to do a re-bill, click the lock icon.



You will be redirected to the master billing management screen, where you can make the desired edits to the master bill, and then generate a new one.

If you have any questions about this tool, please reach out to our technical support team at <a href="mailto:support@transportpro.net">support@transportpro.net</a>.