



Master Billing

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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 support@transportpro.net.

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."

Master Billing						Add Master Bill
ID	Date Created	Created By	# Loads	Total Amount	Date Billed	Manage
1022	03/11/2020	1303		\$0.00	Generate Master Bill	  
1027	03/30/2020	1303	3	\$5,700.00	03/30/2020	
1026	03/17/2020	1303	6	\$12,209.27	03/17/2020	

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.

Manage Master Bill

[Return to Customer Summary](#)
[Print Preview](#)
[Generate Master Bill](#)

Search Loads

Master Bill #	1031
Customer	abc - Antioch, TN
Date Created	03/31/2020 16:01
Pickup Date	- from - <input type="text"/> - to - <input type="text"/>
Delivery Date	- from - <input type="text"/> - to - <input type="text"/>
Billing Date	- from - <input type="text"/> - to - <input type="text"/>
Bill Of Lading	<input type="text"/>
Container #	<input type="text"/>
Manifest #	<input type="text"/>
Pickup #	<input type="text"/>
PO #	<input type="text"/>
Reference #	<input type="text"/>
Seal #	<input type="text"/>
Trailer Requirement	- Select - <input type="text"/>
<input type="button" value="Search"/> <input type="button" value="Clear"/>	

Search Results

Load #	Billing Date	Origin	Destination	BOL	Ref #	Include
2699	03/11/2020	Kennesaw, GA 03/11/2020	Medford, OR 03/12/2020	876545678		<input type="checkbox"/>
2688	03/31/2020	Antioch, TN 03/03/2020	Reed City, MI 03/04/2020	467632		<input type="checkbox"/>
1842	06/26/2017	Kennesaw, GA 06/25/2017	Medford, OR 06/26/2017	345341		<input type="checkbox"/>
2253	04/10/2019	Dover, DE 02/27/2019	Kennesaw, GA 02/28/2019	04679		<input type="checkbox"/>
2491	10/28/2019	Dover, DE 08/22/2019	Chula Vista, CA 08/23/2019	987656		<input type="checkbox"/>

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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.

Search Loads

Master Bill #	1031
Customer	abc - Antioch, TN
Date Created	03/31/2020 16:01
Pickup Date	- from - <input type="text"/> 31 - to - <input type="text"/> 31
Delivery Date	- from - <input type="text"/> 31 - to - <input type="text"/> 31
Billing Date	- from - <input type="text"/> 31 - to - <input type="text"/> 31
Bill Of Lading	<input type="text"/>
Container #	<input type="text"/>
Manifest #	<input type="text"/>
Pickup #	<input type="text"/>
PO #	<input type="text"/>
Reference #	<input type="text"/>
Seal #	<input type="text"/>
Trailer Requirement	- Select - <input type="text"/>
<input type="button" value="Search"/> <input type="button" value="Clear"/>	

Search Results

Load #	Billing Date	Origin	Destination	BOL	Ref #	Include
2699	03/11/2020	Kennesaw, GA 03/11/2020	Medford, OR 03/12/2020	876545678		
2688	03/31/2020	Antioch, TN 03/03/2020	Reed City, MI 03/04/2020	467632		
1842	06/26/2017	Kennesaw, GA 06/25/2017	Medford, OR 06/26/2017	345341		

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Loads included on this Master Bill									
Load #	Billing Date	Origin	Destination	Pickup Date	Delivery Date	BOL	Ref #	Date Added to MB	
2491	10/28/2019	Dover, DE	chula Vista, CA	08/22/2019	08/23/2019	987656		3/31/2020	
2253	04/10/2019	Dover, DE	Kennesaw, GA	02/27/2019	02/28/2019	04679		3/31/2020	

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.

Manage Master Bill

Search Loads

Master Bill #	1031
Customer	abc - Antioch, TN
Date Created	03/31/2020 16:01
Pickup Date	- from - <input type="text"/> 31 - to - <input type="text"/> 31

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

Demo Company, Inc
P.O. Box 1327
Mount Juliet, TN 37121
615-823-1937

Invoice #: MB1031
Invoice Date: Pending



Bill-To	Billing Rep
abc Attn: Freight Payables Antioch, TN 37013	Kelly Frederick Kenneth Kloeppel P: 800-800-5917 kelly.frederick@transportpro.net

Load Information								
Load #	Pickup Date	Delivery Date	Origin	Destination	Bill Of Lading	Reference #	PO Number	Amount
2253	02/27/2019	02/28/2019	Dover, DE	Kennesaw, GA	04679			\$2,650.00
2491	08/22/2019	08/23/2019	Dover, DE	chula Vista, CA	987656			\$2,100.00
Total Charges: \$4,750.00								
Load Count: 2								

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.

Manage Master Bill

Return to Customer Summary
Print Preview
Generate Master Bill

Search Loads	
Master Bill #	1031
Customer	abc - Antioch, TN
Date Created	03/31/2020 16:01
Pickup Date	<div style="display: flex; align-items: center;"> <div style="border: 1px solid #ccc; padding: 2px 5px;">- from -</div> <div style="border: 1px solid #ccc; padding: 2px 5px; margin: 0 5px;">31</div> <div style="border: 1px solid #ccc; padding: 2px 5px;">- to -</div> <div style="border: 1px solid #ccc; padding: 2px 5px; margin: 0 5px;">31</div> </div>
Delivery Date	<div style="display: flex; align-items: center;"> <div style="border: 1px solid #ccc; padding: 2px 5px;">- from -</div> <div style="border: 1px solid #ccc; padding: 2px 5px; margin: 0 5px;">31</div> <div style="border: 1px solid #ccc; padding: 2px 5px;">- to -</div> <div style="border: 1px solid #ccc; padding: 2px 5px; margin: 0 5px;">31</div> </div>

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.

Master Billing						Add Master Bill
ID	Date Created	Created By	# Loads	Total Amount	Date Billed	Manage
1022	03/11/2020	1303		\$0.00	Generate Master Bill	
1031	03/31/2020	1303	2	\$4,750.00	03/31/2020	
1027	03/30/2020	1303	3	\$5,700.00	03/30/2020	
1026	03/17/2020	1303	6	\$12,209.27	03/17/2020	
1021	03/10/2020	1303	3	\$3,100.00	03/10/2020	

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.

File History					Filter	Add File
1 2 » [2]						
File	Index Date	Upload Date	Indexed by	Comments	Manage	
Billing Packet	03/31/2020 13:27	03/31/2020 13:27	Kelly Frederick	Master Billing Packet - 1031	  	
Billing Packet	03/30/2020 17:18	03/30/2020 17:18	Kelly Frederick	MasterBill	  	
Billing Packet	03/17/2020 12:26	03/17/2020 12:26	Kelly Frederick	Master Billing Packet - 1026	  	





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.

Master Billing						Add Master Bill
ID	Date Created	Created By	# Loads	Total Amount	Date Billed	Manage
1022	03/11/2020	1303		\$0.00	Generate Master Bill	
1031	03/31/2020	1303	2	\$4,750.00	03/31/2020	





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.”

Master Billing						+ Add Master Bill
ID	Date Created	Created By	# Loads	Total Amount	Date Billed	Manage
1022	03/11/2020	1303		\$0.00	Generate Master Bill	  
1031	03/31/2020	1303	2	\$4,750.00	03/31/2020	

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.

Master Billing						+ Add Master Bill
ID	Date Created	Created By	# Loads	Total Amount	Date Billed	Manage
1022	03/11/2020	1303		\$0.00	Generate Master Bill	  
1031	03/31/2020	1303	2	\$4,750.00	03/31/2020	

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

Master Billing						+ Add Master Bill
ID	Date Created	Created By	# Loads	Total Amount	Date Billed	Manage
1022	03/11/2020	1303		\$0.00	Generate Master Bill	  
1031	03/31/2020	1303	2	\$4,750.00	03/31/2020	

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 support@transportpro.net.