

TRANSPORT PRO

Void a Settlement: Enterprise

Table of Contents

Void Settlements in Transport Pro.....3

 Void a Settlement.....3

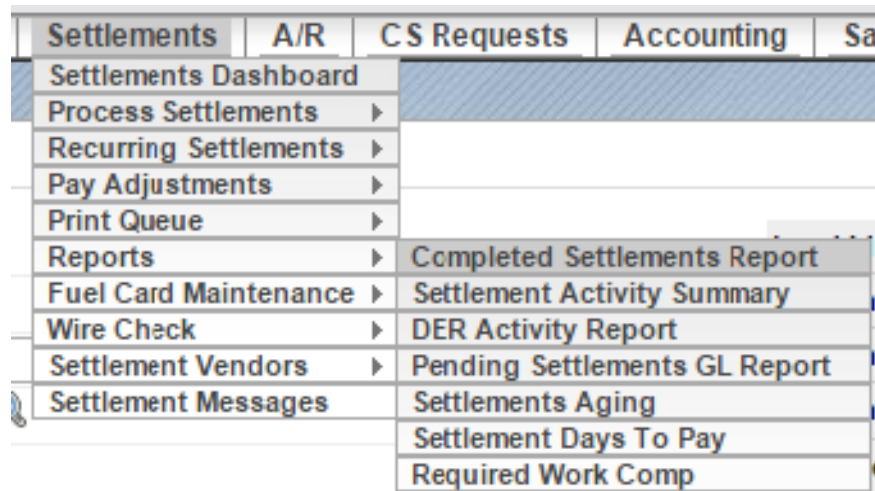
 Reprocess a Voided Settlement.....5

Void Settlements in Transport Pro

Transport Pro makes it easy to void a settlement. This guide details each step you need to take to void a settlement.

Void a Settlement

1. Follow the path in the menu Settlements>Reports>Completed Settlements Report.



2. A Completed Settlements Report window will open and prompt you to filter any preferred criteria. The system does require you to enter at least one type of search criteria. Based on your search criteria, a list of search results will populate.

Completed Settlements Report

Date From	2016-01-01	31
Date To	2016-02-10	31
Amount	From	
Settled By		
Settlement Id		
		Get Report
		Clear



Report Results
Printable Report

Settlement ID	Account Name
1304	A1A Carriers
1305	A1A Carriers

- Click on the Settlement ID of the settlement you want to void.

Settlement ID	Account Name	Settled By
1304	A1A Carriers	Terry Green
1305	A1A Carriers	Terry Green

- A Settlement Summary window will open. In the upper right-hand corner of the page click on the "Void Settlement" link.

		  Void Settlement
01/05/2016		
\$250.00		
Check		
Pending		

- A box will pop up and ask you, "Are you sure you want to void this settlement?" As long as you still want to void the settlement, click "OK."

demo.transportpro.net says: ×

Are you sure you want to void this settlement?

☐ Prevent this page from creating additional dialogs.

OK

Cancel




Reprocess a Voided Settlement

Once you void a settlement, the system places the voided items back into pending settlements so that you can reprocess the settlements at a later time.




1. To re-process the voided settlements, navigate back to the pending settlement detail screen for the correct account. To do so, follow the path in the menu Settlements>Process Settlements>Company Drivers OR Owner Operators (depending on who you need to settle). In this example, we'll re-process a settlement for a company driver.

Settlements	A/R	CS Requests	Accounting	S
Settlements Dashboard				
Process Settlements	▶ Broker Carrier Invoice Approval			
Recurring Settlements	▶ Broker Carriers			
Pay Adjustments	▶ Company Drivers			
Print Queue	▶ Owners / Owner Operators			
Reports	▶ Terminals			
Fuel Card Maintenance	▶ Vendors			
Wire Check	▶			
Settlement Vendors	▶			

2. Find the correct account and click the “Settle” icon out to the right.

Preferred Settlement Day	Current Balance	Settle
None	\$345.24	
None	\$11.88	
None	\$423.36	

3. A list of pending settlements will appear. Check the box out to the right of each item you want to include. Then, click “Approve.”

Check All			
Internal Remarks	Amount	Manage Include	
P/U: 11/09 - DL: 02/25	\$175.56	 	<input type="checkbox"/>
P/U: 12/29 - DL: 05/22	\$169.68	 	<input type="checkbox"/>