



# PETAL

## User Training Manual

**LLPT 1.3 – Carrier Billing V1.0**

# CONTENTS

---

- **Load search for Invoicing**
- **Generate Invoice**
- **Save Submit or Cancel Invoice**

# CUSTOMER INVOICE



LIMN LABS

## Navigation: Billing -> Customer Invoice.

Customer Invoice

Load Search

Customer: Fresh Form Custo...  
load Number: Choose  
Invoice Exists: All  
Date Type: Choose  
Start Date: MM/DD/YYYY  
Span: Choose Type  
SEARCH X


Load and Invoice Summary

DOWNLOAD

GENERATE INVOICE



CUST LOAD NUM	CUSTOMER	RCV W/H	LOAD STATUS	SHIP DATE	INVOICE NUM	INV STATUS	INV DATE	DUE DATE	INV AMT (\$)	VARIAN...	PMT NUM	PMT DATE
<a href="#">LD6178</a>	<a href="#">Fresh Form Customer</a>	BUFF	Partially Delivered	02/25/2023					0	0		
<a href="#">LD6169</a>	<a href="#">Fresh Form Customer</a>	BUFF	In Transit	02/21/2023					0	0		
<a href="#">LD6166</a>	<a href="#">Fresh Form Customer</a>	BUFF	Partially Delivered	01/30/2023	<a href="#">LDI2558</a>	Cancelled	02/21/2023	03/22/2023	0	0		
<a href="#">LD6155</a>	<a href="#">Fresh Form Customer</a>	BUFF	Partially Received	02/12/2023	<a href="#">LDI2560</a>	Cancelled	02/21/2023	03/23/2023	1,925.00	-1,925.00		
<a href="#">LD6139</a>	<a href="#">Fresh Form Customer</a>	BUFF	Partially Received	01/24/2023	<a href="#">LDI2562</a>	Submitted	02/27/2023	03/28/2023	2,475.00	-2,475.00		

- Load search screen provides ability for the carrier to perform multi criteria search on loads that are eligible for invoicing
- Last applied search criteria is saved and used for subsequent query until the criteria is changed
- Loads that are in Delivered, partially delivered, in transit, receipt adjusted statuses are retrieved in search results and allow invoice
- Load results grid allows user to change the column position, apply filters, add or remove selected columns and sort the data based on their preferences and save it as their personalized view.
- Personalized views can be saved from  icon

# GENERATE INVOICE



LIMN LABS

## Generate Invoice

[← Back to PO & Invoice Summary](#)

### Invoice Header



<b>Load Num</b> <a href="#">LD6169</a>	<b>Ship Date</b> 02/21/2023	<b>Invoice Num</b>	<b>Term</b> Net45	<b>Audit Log</b> <a href="#">A</a>	<b>Bill To</b> 789 Test Ave Test City NJ US 76589	<b>Remit To</b> 204 123 Whse St  Client Demo St NH ,US,23457
<b>Customer</b> <a href="#">Fresh Form Customer</a>	<b>Arrival Date</b> 02/23/2023	<b>Inv Date</b> 03/13/2023	<b>Term Basis</b> Invoice Date	<b>Claim #</b> -		
<b>Origin</b> <a href="#">Marina</a>	<b>Destination</b> BUFF	<b>Invoice Amount</b> \$4,150.00	<b>Due Date</b> 04/11/2023	<b>Status</b> <a href="#">Open</a>		

### Invoice Details

DESCRIPTION	UNITS	RATE	TOTAL
Freight Charges	1	4150.00	\$4,150.00
Description	0	0.00	\$0.00
Description	0	0.00	\$0.00
Description	0	0.00	\$0.00

### Invoice Summary

Gross Cost Item (\$)	4,150.00
Less : Discount (\$)	( 0.00)
Net Invoice (\$)	4,150.00
Tax (\$)	0.00
Amount Due (\$)	4,150.00

- Select the load record and click on 'Generate Invoice' from load search screen to get into generate invoice screen
- Most of the load information gets defaulted to the invoice screen such as load num, Customer name etc.

# GENERATE INVOICE

---

- Terms and Invoice date basis should be selected from the available dropdown values based on the credit terms being negotiated with the customer
- “Remit To” should be the dropdown value for sending the payment remittances against the invoice after payment authorization is done by the customer
- Invoice Details:
  - Load freight value is populated under invoice details section as ‘Freight charges’ and amount equivalent to the load freight
  - Any additional service charges for example redelivery fees can be added to the invoice by entering the free text in 2<sup>nd</sup> line and add fee amount
- System will automatically calculate the due date based on the terms and term basis selected

# SAVE SUBMIT OR CANCEL INVOICE



## Generate Invoice

[← Back to PO & Invoice Summary](#)

### Invoice Header

<b>Load Num</b> <a href="#">LD6169</a>	<b>Ship Date</b> 02/21/2023	<b>Invoice Num</b>	<b>Term</b> Net45	<b>Audit Log</b> <a href="#">A</a>	<b>Bill To</b> 789 Test Ave Test City NJ US 76589	<b>Remit To</b> 204 123 Whse St Client Demo St NH ,US,23457
<b>Customer</b> <a href="#">Fresh Form Customer</a>	<b>Arrival Date</b> 02/23/2023	<b>Inv Date</b> 03/13/2023	<b>Term Basis</b> Invoice Date	<b>Claim #</b> -		
<b>Origin</b> <a href="#">Marina</a>	<b>Destination</b> BUFF	<b>Invoice Amount</b> \$4,150.00	<b>Due Date</b> 04/11/2023	<b>Status</b> Open		

- Once invoice entry is completed, it can either be saved for further updates so that the status can be in 'Draft'

- When invoice is submitted, the status changes to 'Submit'

[Home](#) / [Billing](#) / [Carrier Invoices](#) / [LDI2562](#)

Client ID : 3253/CARRIER

## LDI2562

[← Back to PO & Invoice Summary](#)

### Invoice Header

<b>Load Num</b> <a href="#">LD6139</a>	<b>Ship Date</b> 01/24/2023	<b>Invoice Num</b> LDI2562	<b>Term</b> Net45	<b>Audit Log</b> <a href="#">A</a>	<b>Bill To</b> 789 Test Ave Test City NJ US 76589	<b>Remit To</b> 204 123 Whse St Client Demo St NH ,US,23457
<b>Customer</b> <a href="#">Fresh Form Customer</a>	<b>Arrival Date</b> 01/31/2023	<b>Inv Date</b> 02/27/2023	<b>Term Basis</b> Invoice Date	<b>Claim #</b> <a href="#">Multiple</a>		
<b>Origin</b> <a href="#">Marina</a>	<b>Destination</b> BUFF	<b>Invoice Amount</b> \$2,475.00	<b>Due Date</b> 04/11/2023	<b>Status</b> Submitted		

- Submitted invoice can be cancelled by querying and clicking on 'Cancel' button
- When an existing invoice is cancelled system allows to process another invoice on the same load by repeating the invoice creation process

# Thank You