Quick Guide to Creating an Invoice



Introduction

This document provides a quick guide explaining how to manually create an Invoice in the One Network system.

Carriers can create a new Invoice against a Movement plus Carriers can create additional invoices against a Movement to request credit/debit payments.

Note - this Quick Guide is for the NEO UI

Creating an Invoice

- 1. Log in to the One Network system.
- 2. Navigate to Menus/Favs -> Financials -> Receivables -> New Invoice to open the **New Invoice** screen.

one	Carrier Neo Dashbo	ard		C QC QA Carrier One Buelow Transport TMS CARRIER, MANAG	er 🗸
Q Search	Non Controlled Shipments	Scheduled Appointments Rep	Invoice Holds	Claims	
A Home	Shipment State Summary		2 3	Appointment Request Summary	8
Problems	Q Search menu items			No results No results were received.	
	🚖 Favorites	> 1	2 3		
Alerts	E Frequently Visited	> Count			
Chats	🔲 Quick Links	>			
_	Transportation	>	2		
Switch	Scheduling Financials	Claims		New Invoice	
	Reports	> Receivables >	New Invoice		
Menus/Favs	Contract Mgmt	> Accounts	Invoices		
	Administration	> Search Financial Entity	Invoice Lines		
	Tools Command Center Dashboard	> 5	Payments		

3. The **New Invoice** screen displays.

	New Invoi	ce								C ×	QC	QA Carrier One Buelow Transport TMS.CARRIER_MANAG	GER
	* Invoice No:			2		Reference Invoice Nun	nber:						
	Remit To Address:	22 Oak Street Dallas, TX 75244	C			* Bille	d To:		Q				
		US US				Billed To Add	iress:	Ø					
	AR Account:			Q									
	* Currency:	1150				AP Acco	ount:		Q				
	Original Amount:		*			Invoice	Date: 2/2/2021 8:53 PM CST						
	Approved Amount:	0.00 USD				Payment Due I	Date:						
	Related Invoice:			Q									
	AP Invoice:			Q		Attachm	ents:						
	Line	iolds Payme	Orig		Contracted Amount St	ate Notes	Group	Preferr	ed Conversion	Rate			
	Line		Orig			ate Notes	Group	Preferr	ed Conversion	Rate			
	Line		Orig			ate Notes	Group	Preferr	red Conversion	Rate			
2 75	Line		Orig			ate Notes	Group	Preferr	red Conversion	Rate			
2	Line		Orig			ate Notes	Group	Preferr	red Conversion				
2	Line		Orig			nte Notes	Group	Preferr	ed Conversion				

- 4. Enter information in the following fields:
 - a. Invoice No field enter your desired Invoice Number (Note – you can have the system auto-generate an Invoice Number if desired by selecting the "key" symbol located at the end of that field)
 - b. **Billed To** field enter the name of the company that you are billing (Note this is an auto complete field with a **Search** icon)
 - Attachments field attach a copy of invoice documentation as needed (Note – to attach a document, select the Upload link and locate the file on your computer to attach)

* Invoice No:	p	Reference Invo	ice Number:				
Remit Address: 22 Oak Street Dallas, TX 7524	4	Bille	* Billed To:	Q			
US	Q	/					
Invoice No * Currency: USD	~	Billed To	AP Account:	Q			
Original Amount: 0.00 USD			nvoice Date: 2/2/2021 8:55	PM CST			
Approved Amount: 0.00 USD		Payme	nt Due Date:				
Related Invoice:	Q		ttachments:				
AP Invoice:	Q	1	Upload Cance				
	A	ttachments					
Invoice Lines Holds Paym	Orig Approv Contra					7	
	Amoun 🗭 Amoun Amou		Group	Preferred Conversio	en Rate		
					O Add		

	New Invoic	e						8 ×	QC	QA Carrier One Buelow Transport TMS.CARRIER_MANAGER	
	4 Invoice No:		P		Reference Invoice	e Number:					
	Remit To Address:		C			Billed To:	Q				
		Dallas, TX 75244 US			Billed To	o Address:	C				
	AR Account:		Q								
					AF	P Account:	Q				
	* Currency: (~			oice Date: 2/2/2021 8:55 PM					
	Original Amount: 0. Approved Amount: 0.					Due Date:	1.51				
	Invoice Lines Ho	olds Payment		pprov Contracted							
1	Line No Type			moun Amount	State Notes	Group	Preferred Conversio	n Rate			
2 -		🗭 Referer 🗭		moun Amount	State Notes	Group	Preferred Conversio	n Rate	-		
2 -				moun Amount	State Notes	Group	Preferred Conversio	n Rate	-		
				moun Amount	State Notes	Group					
2 -				moun Amount	State Notes	Group		O Add			

5. Next, in the Invoice Lines section, click the Add link to open the New Invoice Line popup window.

6. The **New Invoice Line** popup window displays.

one	New Invoice		Image: Second
Q Search	* Invoice No: 159144 Remit To Address: 22 Oak Street Dalas, TV 75244 AR Account: Q	Reference Invoice Number: * Billed To: One Beliviau Enterprises (x) Q Billed To Address: 5098 Park Rd (x) Lew Invoice Line	×
Home Problems	* Currency: USD Original Amount: 0:00 USD Approved Amount: 0:00 USD	Invoice No: 159144 * Invoice Line No: * Type: Allowance Accessorial Cost	
Alerts	Related Invoice: Q AP Invoice: Q	* Reference: Q * Accessorial: Q Site: Q * Original Amount: USD	
Chats	Invoice Line Holds Payments Line Orig Approv No Type @ Referer @ Amoun @ Amoun	Billed Weight:	
Menus/Favs		Accrual Code: Final Payment Code: Comments:	
			Create Close

- 7. Enter information in the following fields and then click the **Create** button on the popup window.
 - a. Invoice Line No field enter your desired Invoice Line Number (Note – you can have the system auto-generate the Invoice Line Number if desired by selecting the "key" symbol located at the end of that field)
 - **Type** field select the type of cost from the drop-down list for which you are billing Note – the main options to use would be: Freight Base Cost (used to capture the cost for the line haul/base amount), Freight Accessorial Cost (used to capture the cost for a specific accessorial), Freight Tax (used to capture the cost for tax).
 - c. **Reference** field enter the Movement Number this Invoice is created against (Note this is an auto complete field with a **Search** icon)
 - d. **Original Amount** enter the amount for the cost (e.g. 125.75). To indicate a debit amount, enter a hyphen/dash before the number (e.g. -100.50).

one	New Invoice		C QA Carrier One Buelow Transport TMS.CARRIER_MANAGER
Q arch	* Invoice No: 159144 Remit To Address: 22 Oak Street Dalas, TX 75244 US AR Account:	Reference Invoice Number: * Billed To: One Belveau Enterprises X) Q Billed To Addresss: 5099 Park Rd @ New Invoice Line	×
Home	* Currency: USD V Original Amount: 0.00 USD Approved Amount: 0.00 USD	Invoice No: 159144 * Invoice Line No: 285714 * Type: Freight Base Cost 👻	
lerts	Related Invoice: Q. AP Invoice: Q.	* Reference: M-513517 x Q * Original Amount: 435.80 USD Billed Weight: V	
hats	Invoice Lines Holds Payments Line Orig Approx No Type 2" Referer 2" Amoun 2" Amoun		
us/Favs			Create Close
		Create button	Creat

8. Repeat the above step to add additional invoice lines if needed.

9. Once all the invoice line and invoice information has been entered, click the **Create** button on the **New Invoice Screen** to create the invoice.

	ice									ິ ສ	QC	QA Carrier One Buelow Transport TMS.CARRIER_MAN
* Invoice No	159144		۶			Reference Invoice Numb	ber:					
Remit To Address	22 Oak Street Dallas, TX 7524	ß					To: One Beliveau Enterpr					
	US US	4				Billed To Addre	ess: 5098 Park Rd. 28002	C				
AR Account			Ð				Asheville, NC 75022 US					
* Currency	1160	~				AP Accou	int:	Q				
Original Amount												
Approved Amount						Invoice Da Payment Due Da	ate: 2/2/2021 8:55 PM CST					
						Payment Due Da	ate:					
Related Invoice			Q									
			0									
AP Invoice			Q			Attachmer	upload Cancel					
500 - 500 -	Holds Paym	orig	Approv	Contracted	State			Preferred Co	onversion Rate			
Invoice Lines Line No Type K 2857 Freight	Holds Paym	Orig Amoun 435.80	Approv				Upload Cancel	Preferred Co	onversion Rate		_	
Invoice Lines	Holds Paym	Orig	Approv		State	Notes	Upload Cancel	Preferred Co	onversion Rate		-	
Invoice Lines Line No Type K 2857 Freight	Holds Paym	Orig Amoun 435.80	Approv		State	Notes	Upload Cancel	Preferred Co	onversion Rate			
Line No Type X 2857 Freight	Holds Paym	Orig Amoun 435.80	Approv		State	Notes	Upload Cancel	Preferred Co	onversion Rate	Q Add		Create button
Line No Type X 2857 Freight	Holds Paym	Orig Amoun 435.80	Approv		State	Notes	Upload Cancel	Preferred Co	Donversion Rate	Add		Create button

10. A success message displays indicating the invoice has been created.

Record was created successfully				
Invoice Number: 159144		Reference Invoice Number:		
Remit To Address: 22 Oak Street Dallas, TX 75244	C	* Billed To: One Beliveau Enterpris		
US		Billed To Address: 5098 Park Rd. 28002	ď	
Billing Org: One Buelow Transpo	nt Q	Asheville, NC 75022 US		
AR Account:	Q	AP Account:	Q	
Currency: USD	*			
Original Amount: 435.80 USD		Invoice Date: 2/2/2021 7:08 PM PST		
Approved Amount: 0.00 USD		Submit Date:		
Paid Amount: 0.00 USD		Receipt Date:		
Remaining Amount: 0.00 USD		Last Payment Date:		
Hold Count: No Holds		Payment Due Date:		
Related Invoice:	Q			
AP Invoice:	Q	State: New		
		Reason Code:		
		Reason Comment:		
		Attachments: Upload Cancel		

11. When a new invoice is created, it starts in the **New** State.

You will then need to submit the invoice to the company you are billing so they can see your invoice.

one	159144		QC QA Carrier One Buelow	Transport TMS.CARRIER_MANAGER
Q Search	Record was created successfully			×
*	Invoice Number: 159144 Remit To Address: 22 Oak Street Dallas, TX 75244	7	Reference Invoice Number * Billed To: One Beliveau Enterprises X)	
Home	US Billing Org: One Buelow Transport		Billed To Address: 5009 Park Rd 22002 22002 - Asheville, NC 75022 US	
Problems	AR Account:	Q	AP Account	
Alerts	Currency: USD Original Amount: 435.80 USD Approved Amount: 0.00 USD		Invoice Date: 2/2/2/221 7:08 PM PST Submit Date:	
Chats	Paid Amount: 0.00 USD Remaining Amount: 0.00 USD		Receipt Date: Last Payment Date: Payment Due Date: State - Mour	
	Hold Count: No Holds Related Invoice:	Q	Peyment Due Date: State = New	
Switch	AP Invoice:	ଭ	State: New Reason Code: Reason Code: Attachment: Upload Cancel	
	Invoice Lines Holds Payments	1 1		History Actions - Update

12. To submit the invoice, click the **Actions** button and select the **Submit** option.

Clicking **Submit** sends the invoice to the company you are billing, and that company is then able to review your submitted invoice.

Record was created successful	ly			
Invoice Number: 159144		Reference Invoice Number:		
Remit To Address: 22 Oak Street Dallas, TX 75244 US	C	28002	X Q Z	
Billing Org: One Buelow Transp AR Account:	ort	Asheville, NC 75022 US		
Currency: USD	~	AP Account:	Q	
Original Amount: 435 80 USD Approved Amount: 0.00 USD Paid Amount: 0.00 USD Remaining Amount: 0.00 USD Hold Count: No Holds		Invoice Date: 2/2/2021 7:08 PM PST Submit Date: Receipt Date: Last Payment Date: Payment Due Date:		
Related Invoice: AP Invoice:	ଷ୍	State: New Reason Code: Reason Comment:		
		Attachments: Upload Cancel		Submit

13. Once you select **Submit**, a **Confirm** popup window displays. The window asks you if you are sure you want to submit the invoice.

Click the **Yes** button to confirm.

one	159144	Image: Construction of the second
Q Search	Record was created successfully	×
A Home	Invoice Number: 159144 Remit To Address: 22 Oak Street Dallas, TX 75244 US Billing Org: One Buelow Transport	Reference Invoice Number: * Billed To: Billed To: Address: 2002 2002 2002 2002 2002
Problems	AR Account: Currency: USD	AP Account:
Alerts	Original Amount: 435.80 USD Approved Amount: 0.00 USD Paid Amount: 0.00 USD Remaining Amount: 0.00 USD	Confirm × Are you sure you want to submit the invoice?
Chats	Held Count: No Holds Related Invoice:	Lei Yes No
Switch	AP Invoice: Q	State: New Reason Code: Reason Comment: Attachment:
	Invoice Lines Holds Payments	Üptoad Cancel
		History Actions - Update

14. A success message displays, and the State of the invoice changes to **For Review**.

one	159144	Image: Construction of the second
Q Search	Record was updated successfully	×
Home	Invoice Number: 159144 Remit To Address: 22 Oak Street Dallas, TX 75244 US Billing Org: One Buelow Transport AR Account:	Reference Invoice Number: * Billed To: Cone Beliveau Enterprises XX Billed To Address: 2000 2000 Atheville, NC 75022 US AP Account: Q
Problems	Currency: USD Original Amount: 435.80 USD Approved Amount: 0.00 USD Paid Amount: 0.00 USD Remaining Amount: 0.00 USD Held Count: 2 Related Invoice: AP Invoice: Q	Invoice Date: 2/2/2021 7:08 PM PST Submit: Date: 2/2/2021 7:13 PM PST Receipt Date: 2/2/2021 7:13 PM PST Lest Payment Date: Payment: Due Date: State = For Review State: For Review Reson Code:
Henus/Favs	Invoice Lines Holds Payments	Reason Comment: Attachments: Upload Cancel History Actions • Update

15. The company you are billing must review the invoice and either accept it or reject it.

Note – the billing company can set up a policy to auto approve the invoice and its associated **Invoice Amount** based on certain tolerance limits. If the invoice is auto approved once you have submitted it, the State of the invoice changes to **Approved** instead of **For Review**.

16. To view invoices you have submitted and their current State, navigate to Menus/Favs -> Financials -> Receivables -> Invoices to open the **Receivable Invoices** screen.

one	159144	Image: Constraint of the second sec	R V					
Q Search	Record was updated successfully		×					
Home	Invoice Number: 159144 Remit To Address: 22 Oak Street: Dalls, TX 75244 US Billing Ore: Dos Buelow Transport	Reference Invoice Number: * Billed To: Billed To Address: 5089 Park Rd. 2002 Anberolle, NC 75022 US						
Problems	 Q Search menu items ★ Favorites > 	Q AP Account: Q						
Alerts	E Frequently Visited ⇒ Quick Links >	Invoice Date: 2/2/2021 7:08 PM PST Submit Date: 2/2/2021 7:13 PM PST Receipt Date: 2/2/2021 7:13 PM PST Last Paymen Date:						
Chats	Transportation > Scheduling >	Payment Due Date:	- 1					
Switch	Financials > Reports >	Claims Claims New Invoice Invoice Invoices						
Menus/Favs	Contract Mgmt > Administration > Tools >	Search Financial Entity Invoice Lines Upload Cancel Invoice Holds						
	Command Center Dashboard	Payments History Actions	• Update					

17. The **Receivable Invoices** screen displays with the list of invoices and their associated State. The State of the invoice is listed under the **Status** column.

Q Filters (edit): None								
or Pitters (edit). None	Reference Invoice							
Invoice	Number	Billed Org	Status	Reason Code	Reason Comment	Original Amount	Approved Amount	Paid A
159144	•	One Beliveau Enterprises	For Review			435.80 USD		^
159126	•	One Beliveau Enterprises	New			432.50 USD		
159124	•	One Beliveau Enterprises	New			432.50 USD		
159106		One Beliveau Enterprises	New			100.00 USD		
159104	•	One Beliveau Enterprises	New			385.00 USD		
159024	•	One Beliveau Enterprises	New			385.00 USD		
159008	•	One Beliveau Enterprises	New			385.00 USD		
159006	•	One Beliveau Enterprises	New			385.00 USD		
159004		One Beliveau Enterprises	New			385.00 USD		
158984	•	One Beliveau Enterprises	New			385.00 USD		
158964	•	One Beliveau Enterprises	New			385.00 USD		
158944	•	One Beliveau Enterprises	New			385.00 USD		
158904	•	One Beliveau Enterprises	New			385.00 USD		
158886		One Beliveau Enterprises	New			385.00 USD		