Epay Manager

Powered by Level One Technologies

# Epay Manager Invoicing Overview for Carriers

https://www.epaymanager.com

Epay Manager Advantages

Epay Manager is a complete electronic payment system, designed for the transportation industry and is the most effective solution to increasing a carrier's cash flow.

- Receive pre-filled electronic invoices ready for review and submission without data entry.

- Reduce collection time by 6-10 days by eliminating mail.

- Fax or upload proof of delivery documents for shipments instead of mailing originals.

- Accept or dispute invoices online.

- Select from a list of accelerated payment terms on each invoice. *(when available)*

- Easily track the status of all invoices online.

- Generate reports detailing every payment received or scheduled to be received.

- View approved invoices and forecast the exact date of payment.

Epay Manager Transaction Flow
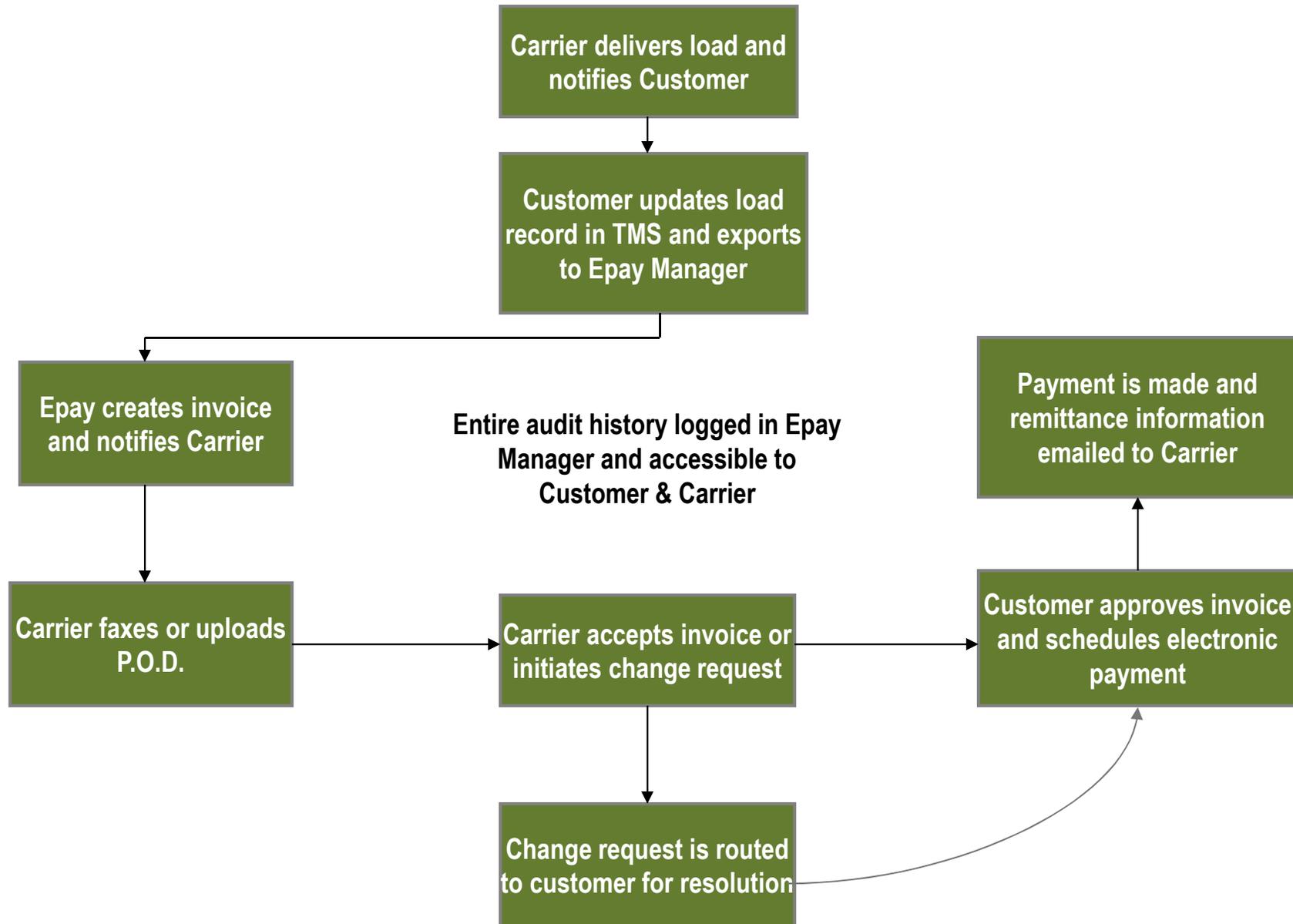
Registration

All companies must register for an account with Epay Manager in order to participate in this program. Registration is simple and can be completed in a few minutes. To register, go to the link listed below and complete the form.
https://www.epaymanager.com/cgi-bin/register

Fill in the required fields to complete registration

Establish a default billing contact. This user should be the person responsible for managing the transaction in Epay. Additional users can be created later.

Check the box next to your customer's name to notify them of registration.

Epay Manager v3.0

FEATURES | SUPPORT | ANALYSIS | PARTNERS | REGISTER

Location: / Home / Features

Forgot Password? Username: Pa

Features
- Overview
- Green Technology
- Distribution List
- Documentation
- Requirements
- Demonstration
- Testimonials
- Pricing
- Register
- Log In

Epay Manager v3.0
Registering for Epay Manager is quick and easy, and includes the following benefits:

→ Improved efficiency & productivity
→ Custom approval sequences
→ Extensive reporting tools
→ Custom payment terms for each carrier
→ Auto payment for all or selected carriers
→ Digitally imaged POD's and invoices
→ All the benefits of EDI without the cost
→ Comprehensive technical support

Company Information
The following information is required to register for Epay Manager. All company information is kept confidential, and will not be distributed to any third parties.

Company Name *
ABC Carrier

Company Address 1 *
123 Main Street

Company Address 2

Company City *
St Louis

Company US State or Non-US Country Code *
MO

Company Postal Code *
63043

Company Phone * & Office Extension
800-240-1824

Billing Contact Information
Please create a username for your account billing contact. The password must be between both letters and numbers.

Contact First Name *
John

Contact Last Name *
Doe

Contact Phone * & Office Extension
800-240-1824

Create Username *
johnabc1

Email Address *
johndoe@epaymanager.com

Confirm Email Address *
johndoe@epaymanager.com

Password *
●●●●●●●●●●

Confirm Password *
●●●●●●●●●●

Registration Notification
Please select one or more of the following members if you would like to notify the companies of your completed registration.

☐ AIR ROAD EXPRESS, INC.
☐ ANDERSON TRANSPORTATION A
☐ APEX FREIGHT SERVICES, IN
☐ BOLT EXPRESS
☐ CLASSIC CARRIERS
☐ DOCMASTER TRANSPORT LLC
☐ ESSA LOGISTICS
☐ FAC FOOD SERVICE LOGISTIC
☐ G & J EXPRESS, INC
☐ HANSON TRANSPORTATION MAN
☑ LEVEL ONE TECHNOLOGIES, I
☐ LOAD ONE

☐ METRO EXPRESS TRANSPORTAT
☐ MIDWESTERN TRANSIT SERVIC
☐ NORTH STAR TRANSPORT GROU
☐ PENSKE TRUCK LEASING
☐ QTI SERVICE CORPORATION
☐ R & D LOGISTICS, INC.
☐ RANDELS EXPRESS,INC.
☐ ROYAL CARRIERS, LLC
☐ RYDER INTEGRATED LOGISTIC
☐ SD LOGISTICS, LLC
☐ STANDARD TRANSPORTATION S
☐ THE SHAKER GROUP, INC.

Submit Company Information
To submit your company information and complete the registration process, please click the "Continue" button.

CONTINUE

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Creating Additional User Accounts

After completing the registration, you can login to Epay and create additional user accounts for anyone in your office that needs access to Epay.

Once logged in, click the Company menu item, then click Users to view a list of current users assigned to your company.

To add a new user, click Add New User from the Users list and complete the form.

All permissions default to Yes, so if access needs to be restricted for specific users, change the setting to No.

Note: For most carriers, all Payables permissions can be set to No, which will reduce the number of menu items displayed making it easier to navigate.

Pending Receivables for Carrier Review

The Pending Receivables list displays invoices that require the carrier's attention. From this list, carriers may view the invoice details to select new payment terms, submit delivery documents and either create a dispute or accept the amount.

Click on Icon to export to Excel/CSV format

Epay Manager

AB TRUCKING

SYSTEM OPTIONS | PRINT SCREEN | HELP CENTER

UPCOMING MAINTENANCE

Accounts Receivable

HELP CENTER   EXCEL   CSV EXPORT

STATUS: **Pending** Disputed Invoiced Approved Paid Cancelled

TRANSACTIONS SELECTED: 0

View Invoice Rejected Doc Doc Classified Discount

FILTER LIST

BATCH SELECTED   VIEW SELECTED   BATCH ALL   CLEAR BATCH

	Keys	Reference # Customer Reference # Carrier Reference #	Entry Date	Origin Destination	Payer Description Customer	Invoice	Discount	Fee	Credit	Curr
☐	I D	901563 N/A N/A	04/09/2013	BLOOMINGTON, IL OKLAHOMA CITY, OK	ABC TRANSPORTATION, ABC CARRIER DEFAULT	3,100.00	77.50	0.00	3,022.50	USD
☐	I	20527 4505585 N/A	02/19/2015	HOUSTON, TX ROANOKE, VA	ON TIME LOGISTICS AB TRUCKING ABC BROKERAGE	1,385.00	0.00	0.00	1,385.00	USD
☐	I	20550 4505588 15683	02/19/2015	SAVANNAH, GA PHOENIX, AZ	ON TIME LOGISTICS AB TRUCKING GLOBAL MANUFACTURING	1,525.00	0.00	0.00	1,525.00	USD
☐	I P	20552 671821 16598	02/19/2015	ENID, OK SAN DIEGO, CA	ON TIME LOGISTICS AB TRUCKING DIRECT SUPPLY	1,385.00	0.00	0.00	1,385.00	USD
☐	I	20556 671822 N/A	02/19/2015	PIERRE, SD CHICAGO, IL	ON TIME LOGISTICS AB TRUCKING ABC BROKERAGE	900.00	0.00	0.00	900.00	USD
☐				Displaying 1 – 5 of 5 Matching A/R Transactions * Totals may be inaccurate due to multiple currencies.					

BATCH SELECTED   VIEW SELECTED   BATCH ALL   CLEAR BATCH

Member
Receivables
  - Pending
  - Disputed
  - Invoiced
  - Approved
  - Paid
  - Cancelled
Reports
Search
Log Out

• Click on Reference Number to view transaction detail

• Click on "I" icon to view Invoice details and submit documents or request changes

Invoice Details

The invoice displays information exported from the customer's management software. This includes a breakdown of charges due and the payment options available to the carrier. Terms are calculated from the date of acceptance. The invoice must be accepted before it can be processed and paid.

Invoice #123456

Customer's Load Number

The invoice has been created by the payer, you have the following options: (watch help video)

STEP 1.
Choose a method to attach delivery documents.

Upload Documents

Fax with Coversheet

Email Attachments

STEP 2.
Your current payment discount is **2 %** with a pay date of **11/02/2015**. Click to select new terms. (optional)

Change Payment Terms

STEP 3.
If you disagree with the Amount Due, please request a change. (optional)

Request Change

STEP 4.
Provide a Carrier Reference Number.

Add/Edit Carrier Reference

FINAL STEP: Click if the Amount Due of **1,053.50** is correct. *

Accept Invoice

Carrier Requirements and Options:

•Submit delivery documents via fax, upload or email

•Select new payment term if needed

•If amount is incorrect, click "Request Change"

•Select Add/Edit Carrier Reference and add your invoice number

•If amount is correct click "Accept Invoice"

PAYMENT SUMMARY

Current Bank Account	Discount	Pay Date	Invoice Date
UNITED STATES BANK XXXXXX6789	3 %	10/22/2015	10/20/2015
	2 %	11/02/2015	
	1 %	11/10/2015	
	0 %	11/20/2015	Amount Due
*Transactions invoiced after 12:00 (US Central) cannot be processed until the next business day.	Please choose one of the Payment Options offered by INTERTRANS.	1,053.50	USD

Attaching Proof of Delivery Documents

When proof of delivery documents (POD's) are required, Epay Manager provides carriers with the ability to upload, fax or email documents for each invoice. Documents will be processed and available online within 5 minutes of receipt. A "P" icon will appear next to the reference number on all lists when a POD is successfully received.

When POD's are required there will be an option for all submission methods on the invoice.

The fax coversheet is generated uniquely for each invoice and must be used when faxing POD's.

The upload feature should be used when documents have been previously scanned and stored on a local computer. Click Browse to find the image and upload up to five files at one time.

Selecting New Payment Terms

When alternative payment terms are offered, they will be displayed on the invoice in the Payment Summary section with the corresponding pay date. To change the terms of the invoice, carriers may click the Change Payment Terms button. This action will only affect the current invoice, giving carriers the ability to selectively exchange discounts for faster payment.

Invoice #123456

[Fax POD]   [Help Video]

The invoice has been created by the payer, you have the following options: (watch help video)

o Print POD coversheet and FAX delivery documents to Epay Manager.   **Download Coversheet**

o Upload delivery documents to Epay Manager.   **Upload Document**

o Your current payment discount is **0** % with a pay date of **07/22/2010**. Click to select new terms. (optional)   **Change Payment Terms**

o If you disagree with the Amount Due, please request a change. (optional)   **Request Change**

o Provide a Carrier Reference Number.   **Add/Edit Carrier Reference**

o FINAL STEP: Click if the Amount Due of **$ 3,350.00** is correct. *   **Accept Invoice**

Click Change Payment Terms to view available terms and select a new term for the invoice.

INVOICE DETAILS

Bill To	Shipper	Receiver
LEVEL ONE TECHNOLOGIES, INC. DEFAULT 875 FEE FEE ROAD MARYLAND HEIGHTS, MO 63043	LEVEL ONE TECHNOLOGIES 875 FEE FEE ROAD SAINT LOUIS, MO 63043	ABC SHIPPING 219 MAIN STREET LOS ANGELES, CA 90007

Pickup Date	Delivery Date	Customer Reference #	Carrier Reference #	Pickup #	BOL #
06/11/2010	06/15/2010	4564898	848911	--	--

Unit #	Freight Class	Pieces	Weight	Equipment	Miles	Rate/Mile
--	--	45	45000	VAN	--	--

Description	Rate
RATE	$ 3,200.00

PAYMENT SUMMARY

Invoice Date
07/21/2010

The payment terms shown on this invoice are created and offered by your customer. Epay Manager does not set or manage your customer's payment terms. Discounted invoices not approved within the selected term will default to the non-discounted rate and term.

Discount	Pay Date
3.5 %	07/22/2010
2.5 %	07/27/2010
0 %	08/23/2010

Current	
0 %	07/22/2010

Selecting New Payment Terms

Please select the payment terms you would like to apply to this invoice from the list below. If no terms are selected, the default terms will be applied. If you have questions regarding payment terms, please visit our **Help Center**.

AVAILABLE PAYMENT TERMS

	Discount	Payment Date
○	3.5 %	07/22/2010
◉	2.5 %	**07/27/2010**
○	0 %	08/23/2010

[Save Payment Terms]   [Cancel Changes]

Submitting A Change Request

When the amount displayed on the invoice doesn't match the carrier's records, the carrier can submit a change request to begin the dispute resolution process. *Note: More detailed information regarding this process is available in a separate tutorial.*

Carrier can Edit an existing line item

Carrier can Add a new line item

Carrier must enter a brief note explaining the change request before submitting. Once entered, the carrier clicks Continue and the request is sent to the customer for review. The carrier will be notified of the resolution electronically.

Tracking A Change Request

When the amount displayed on the invoice doesn't match the carrier's records, the carrier can submit a change request to begin the dispute resolution process. After the change has been successfully submitted, the invoice will remain on the carrier's Receivables Disputed list, until the Customer resolves the dispute.

Transactions with an active change request will display on the Disputed list.

The status of each dispute is listed in the keys column.
- A white "C" means the dispute is open.
- A yellow "C" means a review is in progress.
- A red "C" means the dispute has been updated and resolved.

Accepting an Invoice

When all required documentation has been submitted, payment terms selected and disputes have been resolved, the carrier must accept the invoice before it can be approved and scheduled for payment by the customer. Payment Terms are calculated from the date the carrier accepts the invoice.

Invoice #123456

| | Fax POD | Help Video |

The invoice has been created by the payer, you have the following options: *(watch help video)*

o Print POD coversheet and FAX delivery documents to Epay Manager.   **Download Coversheet**

o Upload delivery documents to Epay Manager.   **Upload Document**

o Your current payment discount is **0** % with a pay date of **07/22/2010**. Click to select new terms. *(optional)*   **Change Payment Terms**

o If you disagree with the Amount Due, please request a change. *(optional)*   **Request Change**

o Provide a Carrier Reference Number.   **Add/Edit Carrier Reference**

o **FINAL STEP:** Click if the Amount Due of **$ 3,350.00** is correct. *   **Accept Invoice**

Clicking Accept Invoice establishes the invoice date and notifies the customer to approve the invoice for payment. Once the invoice is accepted, no changes can be made by the carrier.

INVOICE DETAILS

Bill To	Shipper	Receiver
LEVEL ONE TECHNOLOGIES, INC. DEFAULT 875 FEE FEE ROAD MARYLAND HEIGHTS, MO 63043	LEVEL ONE TECHNOLOGIES 875 FEE FEE ROAD SAINT LOUIS, MO 63043	ABC SHIPPING 219 MAIN STREET LOS ANGELES, CA 90007

Pickup Date	Delivery Date	Customer Reference #	Carrier Reference #	Pickup #	BOL #
06/11/2010	06/15/2010	4564898	848911	--	--

Unit #	Freight Class	Pieces	Weight	Equipment	Miles	Rate/Mile
--	--	45	45000	VAN	--	--

Description	Rate
RATE	$ 3,200.00

PAYMENT SUMMARY

Invoice Date
07/21/2010

The payment terms shown on this invoice are created and offered by your customer. Epay Manager does not set or manage your customer's payment terms. Discounted invoices not approved within the selected term will default to the non-discounted rate and term.

Discount	Pay Date
3.5 %	07/22/2010
2.5 %	07/27/2010
0 %	08/23/2010
Current	
0 %	07/22/2010

Tracking an Invoice

After accepting an invoice, carriers can track its progress on the Receivables lists provided in Epay. Each list allows users to sort, filter and export the information displayed.

The Invoiced list displays all transactions accepted by the carrier, but not yet approved for payment by the customer.

The Approved list displays all transactions approved for payment and shows the scheduled pay date.

The Excel and CSV icons allow users to export data from each list to a spreadsheet.

View Paid Invoices

All invoices paid in the last seven days will be displayed on the Receivables Paid list. Invoices older than seven days are archived for three years and can be found using the reporting tool. Email notification of payment is sent to the default billing contact's email address unless this preference is turned off.

Users are able to track recent payments by monitoring the Paid list or by using the remittance email. Each contains all relevant reference numbers, payment dates and amounts paid.
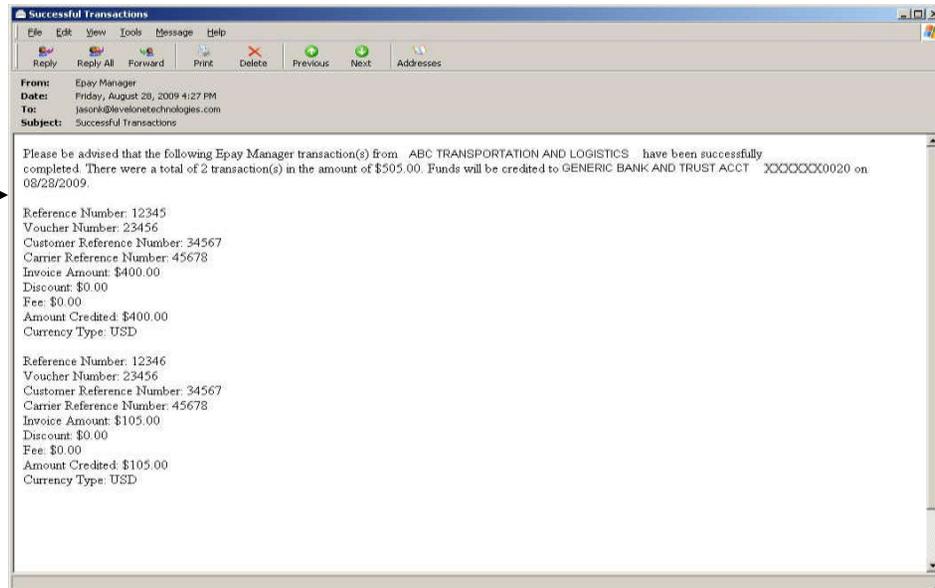
Receivables Reports

Carriers have the ability to generate reports on all receivables stored in Epay Manager using the report generator. Carriers can forecast cash flow by scheduled pay date, reconcile payments by date paid and verify invoices by entry date. Reports can be filtered by status, customer, reference number and many other criteria.

Begin by entering a date range and selecting a date type and status. All other criteria is optional.

Report results will be displayed in detail with totals at the bottom of the last page. All report results can be exported using the Excel and CSV icons.

Conclusion

Level One Technologies provides transportation companies with innovative, web-based applications that streamline common business practices. Level One's applications include Epay Manager, an online accounts payable system designed for the transportation industry.

Epay Manager benefits both shippers and carriers by reducing processing time and cost and increasing communication between the parties. Carriers benefit by having faster payment options, fewer processing days, direct deposit of funds and a complete view of the transaction through the payment cycle. Full audit logs provide all members with the date and time of every activity. Automated email notification and real-time reporting allow carriers to focus on operational issues instead of managing unpaid invoices.

Additional demonstrations can be viewed online at http://www.epaymanager.com/demonstration.html

If you have additional questions or comments, please contact Level One Technologies at (800) 240-1824 or send an email to service@epaymanager.com.