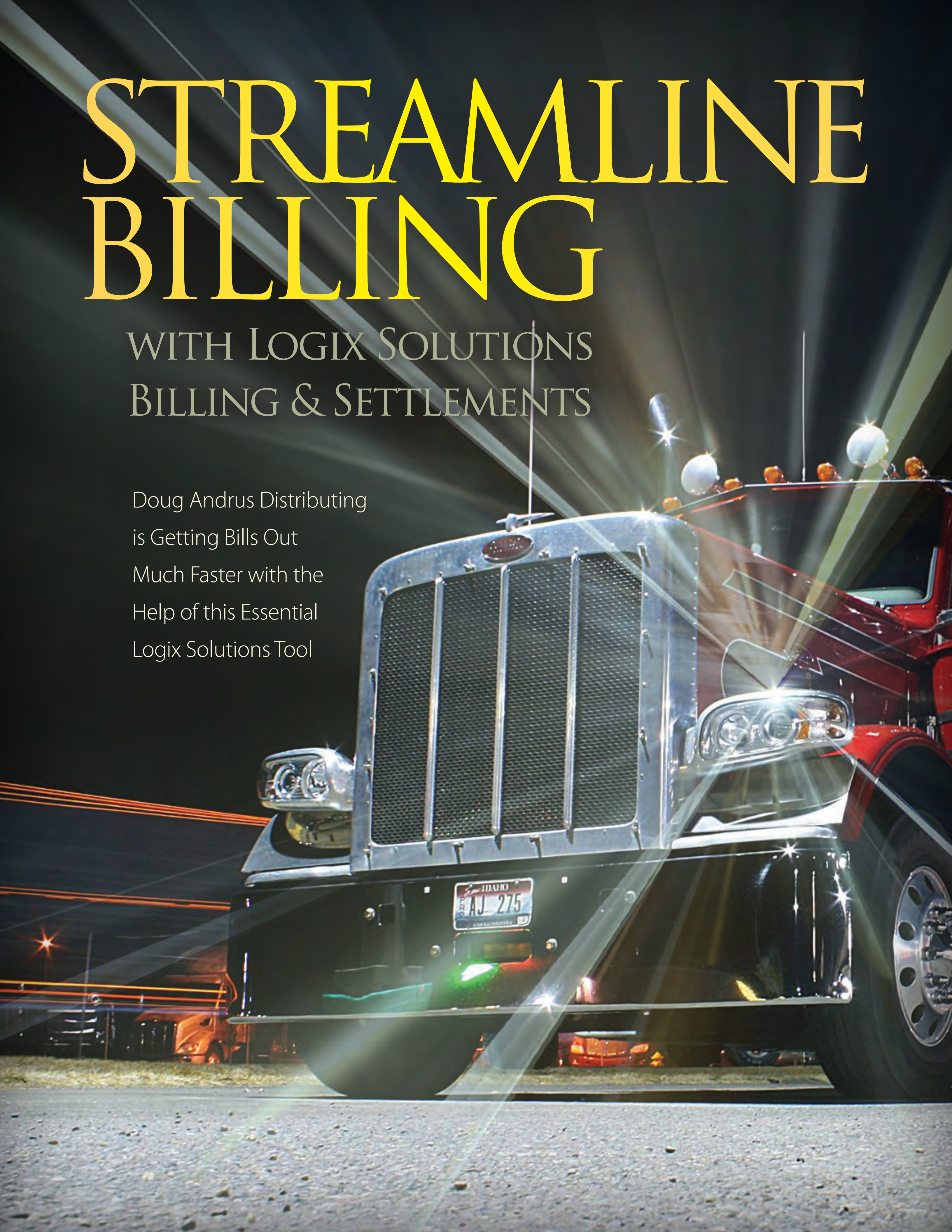
STREAMLINE BILLING

with Logix Solutions Billing & Settlements

Doug Andrus Distributing is Getting Bills Out Much Faster with the Help of this Essential Logix Solutions Tool

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In the business world, once your work is done, it's time to submit the bill. Unfortunately for the trucking industry, it's not that simple. Carriers and brokers face the time-consuming chore of ensuring all documentation connected to an order has been gathered before the invoice can be submitted to the customer. For years, this work has been handled manually. Someone on the staff has to audit each and every order, and the search for missing paperwork can drag on for days.

But what if you had an invisible engine working for you around the clock to handle this menial work? An automated helper that is continually monitoring all of your orders every second of every day, verifying that required documents are present, updating relevant fields in LoadMaster, and routing work to specific billing and settlement queues.

That's exactly what McLeod has done with Logix Solutions Billing and Settlements Workflow. This is a DocumentPower workflow product that operates behind the scenes to bring efficiencies to your processes for billing and settlements.

The Billing and Settlements Workflow Tool: Features and Options

- **It's easy and intuitive** — There are no additional screens to navigate or new software rules to learn.
- **Starts with order entry** — The core functions of the Billing and Settlements engine kick in on each order as soon as it's entered into the system.
- **Confirms BOL** — The tool's first task is to confirm the receipt of the BOL for the order.
- **Continually audits the system** — Once the BOL is confirmed, the tool continually audits the system to answer this question, "Does the order have all of the supporting materials in place in order to bill effectively?"
- **Monitors everything behind the scenes** — The engine monitors everything behind the scenes. If documentation is missing, the engine parks the order until the missing documentation arrives.
- **Manage by exception** — The tool makes sure everything has been scanned and entered into the system before automatically releasing the order. Unrecognized documents are sent to a special queue where they can be managed by exception.
- **Auto-resolves orders** — Once all of the documentation has been received, the engine auto-resolves the order and sends it to the billing queue so that it can be processed manually or passed along to Rendition Billing.

- **Option for handling settlements** — You have the option of handling settlements at the same time as billing or at a later time.
- **Configuration options** — The tool can be configured to accommodate the needs of different customers and specific orders.
- **Ongoing visibility** — Also, during any stage, LoadMaster users have complete visibility into the status of any order.
- **Additional features available with Billing and Settlements Workflow Pro** — Billing and Settlements Workflow Pro has features that further validate and streamline the billing process.
  - *Searches for problems or additional documentation*—The more advanced Pro version of this product first looks to make sure the order has been delivered, and determines if there are any issues around delivery. If any additional documentation has been specified for the order, these will be audited as well.
  - *Sends out email notifications*—If validation fails for any reason, email notifications and reports showing how long the issue has been present can be automatically sent out so that actions can be taken as needed to handle the issues involved.
  - *Transfers to Rendition Billing*—After the order has been fully validated, the Billing and Settlements Workflow Pro version follows the same pattern as Billing and Settlements Workflow and asks if all of the documents needed for billing are there. However, once the order is ready, you have the option of configuring the engine to send the bill automatically to Rendition Billing. With Pro, one more manual step is taken out of the equation. No human intervention is needed.

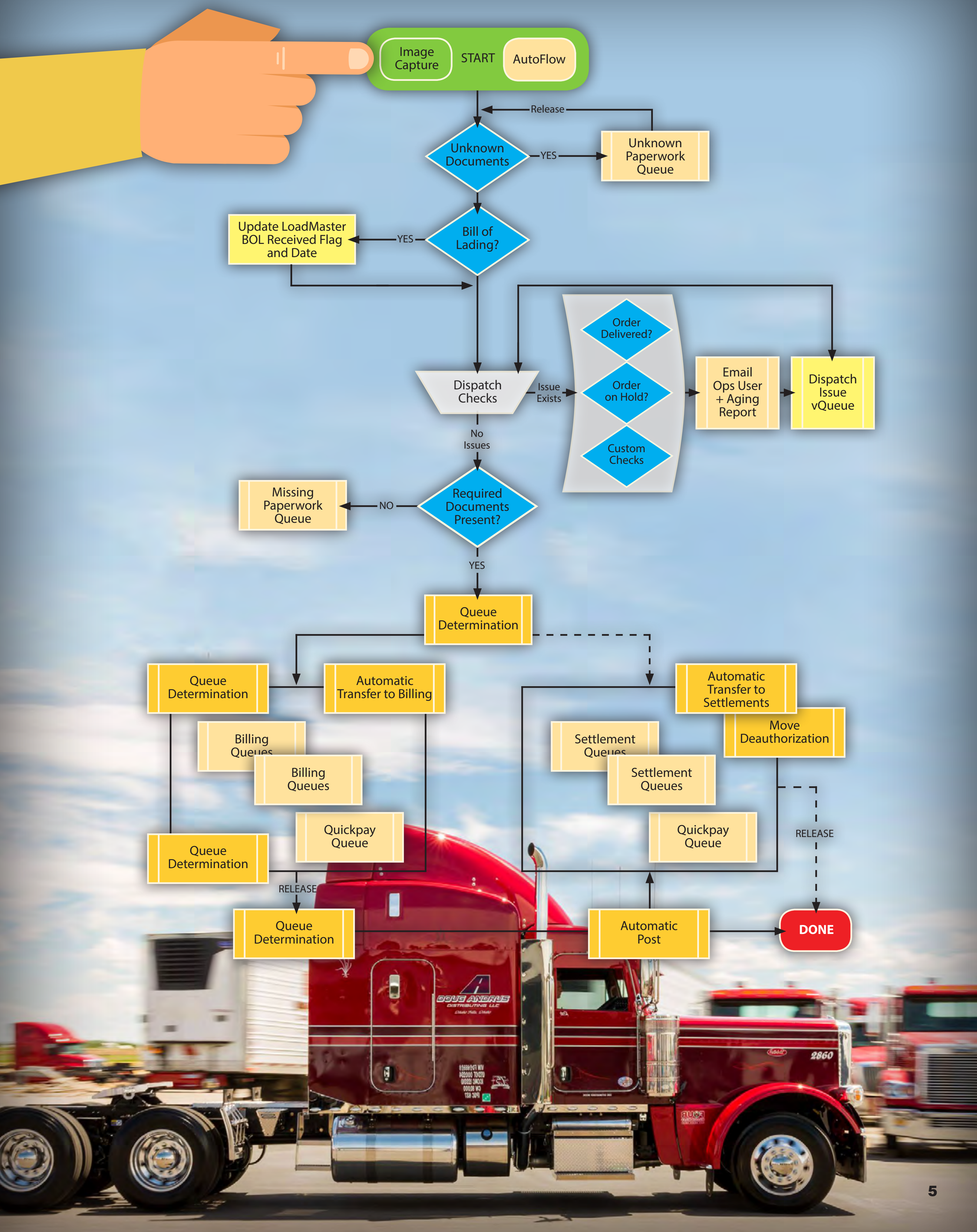

Image Capture
START
AutoFlow
Release
Unknown Documents
YES
Unknown Paperwork Queue
Update LoadMaster BOL Received Flag and Date
YES
Bill of Lading?
Order Delivered?
Dispatch Checks
Issue Exists
Order on Hold?
Email Ops User + Aging Report
Dispatch Issue vQueue
Custom Checks
No Issues
Missing Paperwork Queue
NO
Required Documents Present?
YES
Queue Determination
Queue Determination
Automatic Transfer to Billing
Automatic Transfer to Settlements
Move Deauthorization
Billing Queues
Billing Queues
Settlement Queues
Settlement Queues
Quickpay Queue
Quickpay Queue
RELEASE
Queue Determination
RELEASE
Queue Determination
Automatic Post
DONE

Case Study: Doug Andrus Distributing

Based in Idaho Falls, Idaho, Doug Andrus Distributing has been hauling freight for over 75 years. Today the company serves customers throughout the U.S. and western Canada with a fleet of over 270 trucks and 500 trailers, including refrigerated trailers, dry vans, flatbeds, and hoppers. Erica Moore and Tricia Spackman explain how Doug Andrus Distributing uses Logix Solutions Billing and Settlements.

- **We eliminated a step in our billing process** — "Prior to having this tool, we would start our billing process by using the Order Entry screen in LoadMaster. We would key in the load number and then work within that screen to verify which documents had been scanned and entered into the system and which had not. Once everything about the load was in place, we would transfer the order to Billing. Now, we have completely eliminated this step and all of the work involved. We start in the Bill Processing screen and that's where the majority of our work is done. We no longer have to check to see if everything has been scanned and entered into the system, because the tool does that for us."
- **We can set up the system to accommodate the various needs of our customers** — "The McLeod system allows us to specify which documents are required for billing for each customer and each order. We tell the system which documents to look for and where each document should be sent. Once we've set this up for each customer or order, we can edit the details as needed. Customers can differ greatly on what documentation they require. Some customers want a long list of documents attached to their invoices, and others don't require any paperwork at all. We take special care to ensure that we have this set up correctly, because the system will look for all of the documentation that is listed for each order. We don't want the system looking for documents that aren't needed or failing to look for ones that are required."
- **The tool works behind the scenes for us** — "The system keeps track of everything and is constantly searching for documents. If we tell it to look for Proof of Delivery, it will look for that as soon as the load is delivered. Say that the documents for an order include the load confirmation, the weight ticket, and the POD. Once the load is delivered, if the load confirmation and the weight ticket are there, but the POD is missing, the order will be sent to the Missing Paperwork queue. It will sit there until the missing documents are scanned in."

- **We use the Missing Paperwork queue to manage by exception** — "We call the Missing Paperwork queue the Exception Queue, because we know that the orders in that queue are the ones that need our special attention. We check this list every day to see what tasks need to be handled."
- **We can see everything** — "It's easy to see the status of every billable load that hasn't yet been billed. This tool makes it simple to pull up any load in the Bill Processing screen and see what documentation is missing. Before having this tool, we relied on a much more labor-intensive process. We had piles of order envelopes sitting on our

desks. We would make notes, such as 'Missing load confirmation' and 'Send email to the dispatcher about this.' Now it's all electronic and at our fingertips."

- **Email notifications go out automatically** — "If a load gets put on hold for some reason or is past its delivery time and has not been delivered, we can arrange to have emails automatically sent out to the person who entered that load. The emails will go out at specified time intervals, such as every 24 hours, and we can adjust the time frame for how frequently these notifications go out."

- **Our goal is to streamline billing even more** — "The tool gives us the option of having bills sent automatically to Rendition Billing without human intervention once all the documentation is all in place and the order has been validated. We've chosen not to use this because we like having one final opportunity to have someone make sure everything is in order before we send out the invoice. This is a quality assurance decision on our part. But we may choose to use this option in the future. We're always trying to find more ways to automate the process and streamline it further. We're constantly tweaking and trying to adapt. It's a company-wide effort. Our ultimate goal is to get bills processed within 24 hours of delivery. To achieve this goal, everyone has to do their part — dispatchers, drivers, and billing staff."

- **It's very easy to use this tool** — "This tool has been very easy for us to use. It's almost too easy. Switching from our previous method of billing to this more automated process required that we trust the system. We had been in the habit of manually checking things, so it made us a little nervous at first to let go of our old routines. This way of doing things seemed too simple. Without doing those double-checks, we kept expecting something to go wrong, but it's worked wonderfully. We could never go back to the manual process now."

- **We've cut our billing cycle and improved our cash flow** — "Before we started using this tool, it took us an average of 6 days from delivery to billing. Since then, ***we've cut it to an average of 3 to 4 days. As a result, our average DSO has gone from 35 days to 30 days.***"

- **Our list of unbilled loads is dramatically smaller** — "Another measure that shows how much our billing process has improved is unbilled loads. We run a report each week that lists all loads within a two-week period that haven't been billed yet. In most cases, the reason is missing documents. ***Before getting this tool, those reports could run from five to eight pages long. Now our unbilled report is about one page long."***

- **The tool gives us more time to dedicate to other tasks** — "In the past we would work on the multi-page unbilled report when we had time, but we were still spending the bulk of our time handling everyday billing tasks. In any case, it would not be easy to deal quickly with a list that long. Now when that report comes out on Wednesday, our staff can tackle it instantly, because they have the time to troubleshoot and figure out what the issues are. By the end of the day, we can pretty much have that report cleared out. That's a big change for us."

- **The tool is flexible** — "One of the great things about this tool is the way it allows us to customize the process. If something is not quite working, we can change it. We're not stuck with the way we set it up at first. We can find ways to tweak it to make it work better for us."

Let McLeod's Logix Solutions Workflow Tools Transform Your Business Processes

Logix Solutions Workflow tools help you eliminate mundane manual tasks through automation. When you let the software do the time-consuming chores for your staff, they have more time to spend on important matters that move the business forward. With Billing and Settlements Workflow, your staff no longer has to waste time checking on documentation and validating orders, because the system is doing that around the clock for them. Labor expense is saved and the streamlined process empowers your staff to get bills out more quickly. Once you make the move to the Logix Solutions Workflow world, you'll wonder how you ever managed your business without it.

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