DESCRIPTION: This hands-on workshop is designed for billers and operation managers who want a deep understanding of how to customize and use Haullt to improve the efficiency and visibility into quoting, and billing processes.

TOPICS:

Quoting

- Quote customizing and preferences
- Material masters overview
- Creating hauling rates
- Different methods of pricing material
- Creating in-bound and out-bound lines on the same quote
- Adding accessorial charges
- Adding driver pay lines
- Creating Jobs from quotes
- Creating custom standby times per line item

Jobs

- Job customizing and preferences
- Income codes
- Setting up standby charges
- Setting up Units of measure
- Managing date sensitive rate, pay, material, surcharge rate changes
- Job history

Driver Pay

- Paying a percentage
- Comparing percentage pay to hourly pay and paying the higher
- Paying a driver for other charges including standby
- Paying company drivers vs. third party haulers

Billing

- Making customers inactive
- Billing customizing and preferences
- Managing ticket importing
- Invoicing
- History lookups
- Managing Holding Billing
- Billing reports

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