
INVOICE TEMPLATE FOR CUSTOMER

Overview

Invoice Template

Invoice template is created to allow automatically loading of default charges when new invoice is created. In this way, you don't have to input charges each time for same customer.

Customer rate and charges template are created under "Delivery Address" section of customer account profile.

Noted that customer account profile will have multiple delivery address, each delivery address will have its associated rate and invoice template.

Customer Rate

To setup customer rate for each delivery address, simply edit customer account profile. Select "Delivery Address" tab, click delivery address record to edit, input "Rate".

Account ID: 57123
 Company Name: K & K Shipping
 Address: 15 farquhar ave
 City: LOS ALAMITOS
 State Zip/Postal: CA - CALIFC 90720
 Phone (1):
 Primary Email: diana.vidal@testing.com
 Additional Information:
 Portal Control: WEB ACCESS ON, kkshipping, testing

Status: ACTIVE
 Contact Person:
 Country: United States
 Credit Limit/Term: 0 1ST OF MO

Alert ! This customer is having over due amount \$6,437.40

Account Type: Delivery Locations | Email List | Notes

new refresh

Delivery Location	Location Address
DEMO Delivery Location - 149	1551 S LILAC AVE
DEMO Delivery Location - 251	19914 S VIA BARON
DEMO Delivery Location - 252	22351 S WILMINGTON
DEMO Delivery Location - 258	11500 LOS NIETOS RD
DEMO Delivery Location - 262	3350 1/2 WARNER AVE
DEMO Delivery Location - 263	2850 E EL PRESIDIO ST
DEMO Delivery Location - 265	280 trade st
DEMO Delivery Location - 266	9918 via pasar
DEMO Delivery Location - 267	6075 LANCF DR. RIVERSIDE

total 9 records listed

Delivery Address

DELIVERY ADDRESS FOR K & K Shipping

Delivery Location Name: DEMO Delivery Location - 252

Address Line 1: 22351 S WILMINGTON

Address Line 2:

Address City: WILMINGTON

State/ Zip: CA 90745

Phone:

Contact Person:

Rate (\$): 115 (For Invoice)

save close

Rate input here will be automatically loaded when invoice is created. See below screen capture.

Account Type: Delivery Locations | Email List | Notes

new refresh

Delivery Location	Location Address	City	Rate	Action
DEMO Delivery Location - 149	1551 S LILAC AVE	BLOOMINGTON	\$550.00	
DEMO Delivery Location - 251	19914 S VIA BARON	RANCHO DOMINGUEZ	\$300.00	
DEMO Delivery Location - 252	22351 S WILMINGTON	WILMINGTON	\$115.00	
DEMO Delivery Location - 258	11500 LOS NIETOS RD	SANTA FE SPRINGS	\$385.00	
DEMO Delivery Location - 262	3350 1/2 WARNER AVE	IRVINE	\$420.00	
DEMO Delivery Location - 263	2850 E EL PRESIDIO ST	LONG BEACH	\$300.00	
DEMO Delivery Location - 265				
DEMO Delivery Location - 266				
DEMO Delivery Location - 267				

total 9 records listed

Billing Invoices

SAVE EXIT

DEMO AMERICAN TRUCKING...

Bill To: 57123
 K & K Shipping
 15 farquhar ave
 LOS ALAMITOS
 CA 90720
 TEL:

Invoice Number: **AUTO-GENERATED**
 Invoice Date: 11/04/2020
 Due Date: 1/3/2021

Customer Reference: AISIO2010268

Container #: EGHU857975
 Deliver to: DEMO Delivery Location - 263
 2850 E EL PRESIDIO ST
 SHENZHEN CA 90810
 ETA : 04/12/2021

TOTAL INVOICE AMOUNT : \$ 363.00

Charge Description	Rate	Qty	Amount	Charge Description	Rate	Qty	Amount
<input checked="" type="checkbox"/> CHASSIS SPLIT (DROP-OFF)				<input checked="" type="checkbox"/> CHASSIS SPLIT (PICK-UP)	50.00	1.00	50.00
<input checked="" type="checkbox"/> DETENTION	4.00	1.00	4.00	<input type="checkbox"/> OVER WEIGHT FEE			
<input type="checkbox"/> REEFER PLUG-IN				<input type="checkbox"/> Scale fee			
<input type="checkbox"/> Scale stop-off				<input type="checkbox"/> WAITING FEE			
<input type="checkbox"/> AUTO POSTED (SYSTEM RESERVE)				<input type="checkbox"/> CHASSIS RENTAL			
<input type="checkbox"/> DELIVER WAITING				<input type="checkbox"/> DEMURRAGE			
<input type="checkbox"/> DRY RUN CHARGE				<input checked="" type="checkbox"/> FREIGHT RATE	300	1	300.00
<input type="checkbox"/> LIFTGATE CHARGE				<input type="checkbox"/> PERDIEM CHARGE			
<input checked="" type="checkbox"/> PICKUP WAITING	4.00	1.00	4.00	<input checked="" type="checkbox"/> PIER PASS	5.00	1.00	5.00

Customer Invoice Template

To setup customer rate for each delivery address, simply edit customer account profile. Select "Delivery Address" tab, click "Template" icon for particular delivery address record.

City: LOS ALAMITOS
 State Zip/Postal: CA - CALIFC | 90720
 Phone (1):
 Primary Email: diana.vidal@testing.com
 Additional Information:
 Portal Control: WEB ACCESS ON | kksipping | testing
 Credit Limit/Term: 0 | 1ST OF MONTH
 Phone (2):

Alert ! This customer is having over due amount \$6,437.40

Account Type	Delivery Locations	Email List	Notes
<input type="button" value="new"/> <input type="button" value="refresh"/>			
Delivery Location	Location Address	City	Rate
DEMO Delivery Location - 149	1551 S LILAC AVE	BLOOMINGTON	\$550.00
DEMO Delivery Location - 251	19914 S VIA BARON	RANCHO DOMINGUEZ	\$300.00
DEMO Delivery Location - 252	22351 S WILMINGTON	WILMINGTON	\$115.00
DEMO Delivery Location - 258	11500 LOS NIETOS RD	SANTA FE SPRINGS	\$535.00
DEMO Delivery Location - 262	3350 1/2 WARNER AVE	IRVINE	\$420.00
DEMO Delivery Location - 263	2850 E EL PRESIDIO ST	LONG BEACH	\$300.00
DEMO Delivery Location - 265	2800 BROADWAY	SAN MATEO	\$750.00

Input page will be shown, simply input charges amount and click "Save" button to create.

Not secure | demo.systemonepro.com/ChargeCodeCustomer.asp?coid=57103&deliveryRecid=126

CHARGE CODE TEMPLATE

Input amount for charge items to create default invoice template for this customer.

CUSTOMER: **AMERICAN GENERAL LOGISTICS, INC.**
 DELIVERY LOCATION: **Warehouse-1**

AIR PORT/CFS FEES	1.00
CHASSIS RENTAL	2.00
CONVENTION CHARGE	3.00
CTF	4.00
DELIVER WAITING	5.00
DEMURRAGE	6.00
DRY RUN CHARGE	7.00
EXAM STOP	0.00
EXAMINE FEE	0.00
FREIGHT CHARGE	0.00
FUEL CHARGES	0.00
INSURANCE	0.00
LABOR CHARGE	0.00
LIFTGATE CHARGE	0.00
NIGHT GATE	0.00
OTHER CHARGES	0.00
OVER WEIGHT	0.00
PERDIEM CHARGE	0.00
PICKUP WAITING	0.00
PIER PASS	0.00
PREPULL	0.00
REFUND	0.00
RESIDENCE CHARGE	0.00
STORAGE CHARGE	0.00
STORAGE CHARGE	0.00
TRUCKING RATE	0.00
WAITING FEE	0.00
WEIGHT FEE	0.00

Once template is created, charges items with predefined amount will be automatically loaded when invoice is created. Noted that if charges is specified in shipment page, it will override the template amount (if created).

Last Modified	ON 12/3/2019 10:06:36 PM DT Bhatt	
MBL	M1000000	
PIN	3468	
Yard	LB	
Seal Number		
Container Empty Ready		
Empty Return Date/Remarks	0 AM : 00	
Pier Pass Paid By	DEMO AMERICAN LINK INC.	
Pier Pass	72.09 <input checked="" type="checkbox"/> PAID	
Demurrage Fee	120	<input type="checkbox"/>
Examine Fee	60	<input type="checkbox"/>
OverWeight Fee	0	<input type="checkbox"/> 13441LBS
Waiting Time	0	Hour \$ 0 per hour
Additional Charge		