FREIGHT BROKERAGE · SETTLEMENT AND BILLING OPERATIONS

Invoice processing and billing

Automates invoice creation, validation, and billing processes for completed freight shipments, ensuring accurate carrier payments and customer billing while reducing manual processing time and errors.

01 WORKFLOW TRIGGER

Shipment delivery confirmation is received in the TMS system

BLUEPRINT OVERVIEW

What this workflow accomplishes

This workflow connects Axon TMS and McLeod LoadMaster so that a confirmed delivery moves straight into carrier settlement and customer billing without a clerk retyping rate confirmations. Automation pulls load details, compares actual charges to the quoted rate, builds both invoices, and posts them to accounting. Billing staff keep authority over rate variances, accessorial approvals, holdbacks, and any invoice that leaves the building against a customer's stated billing rules.

01

OUTPUTS

Carrier payment invoice, Customer billing invoice, Posted accounting entries, Variance audit record

02

SUCCESS MEASURES

Invoice processing time per load, Billing accuracy rate, Days to collection, Variance queue volume

03

CORE SYSTEMS

Axon TMS, McLeod LoadMaster

HOW TO USE THIS BLUEPRINT

Operations managers: confirm the variance thresholds and accessorial rules match how your desk actually prices detention, layover, and lumper charges.

Billing and settlement staff: work the audit queue daily and record why each variance was approved or reduced before the invoice releases.

Implementation teams: map McLeod rate tables and Axon customer billing profiles field by field before turning on automatic distribution.

THE WORKFLOW

End-to-end stage map

Six stages carry a load from delivery confirmation to invoices out the door. The single decision point at stage three governs whether the load bills automatically or lands in the audit queue for a human to price.

IMPLEMENTATION DETAIL

Stage-by-stage breakdown

Each stage states the operational intent, the human control point, and the systems likely to take part. System names are examples, not a required architecture.

01 TRIGGER

Delivery Confirmation Received

System detects shipment delivery confirmation with proof of delivery documentation uploaded. This triggers the automated invoice processing workflow.

CONTROL POINT

The dispatcher who closed the load verifies the POD is legible and matches the BOL number before the load flips to billable status.

SYSTEMS Axon TMS

02 ACTION

Extract Load Details

Retrieves complete load information including carrier rates, accessorial charges, fuel surcharges, and contracted pricing from the load management system. Validates all required documentation is present.

CONTROL POINT

Billing staff confirm any missing document, such as a signed lumper receipt or scale ticket, and can hold the load out of billing until it arrives.

SYSTEMS McLeod LoadMaster Axon TMS

03 DECISION

Validate Rate Accuracy

Compares actual charges against original quoted rates and checks for any discrepancies or additional fees. Routes to manual review if variances exceed predefined thresholds.

CONTROL POINT

The settlement lead sets the dollar and percentage thresholds and is the only role that can clear a flagged variance.

SYSTEMS McLeod LoadMaster

04 ACTION

Generate Carrier Invoice

Creates carrier payment invoice with all applicable charges, deductions, and payment terms. Applies any factor fees or holdbacks per carrier agreement.

CONTROL POINT

Carrier settlement reviews factoring assignments, advances, and claim holdbacks before the payable is approved for the check run.

SYSTEMS Axon TMS McLeod LoadMaster

COMPLETION AND MEASUREMENT

Closing stages and results

The closing three stages produce the carrier invoice, the customer invoice, and the accounting entries that drive aging and collection tracking.

05 ACTION

Generate Customer Invoice

Creates customer billing invoice with freight charges, accessorials, and any markup applied. Formats invoice according to customer-specific requirements and payment terms.

CONTROL POINT

The account manager approves markup and accessorial pass through on any customer with a negotiated tariff or portal submission rules.

SYSTEMS Axon TMS McLeod LoadMaster

06 OUTPUT

Distribute Invoices

Automatically sends carrier payment invoice and customer billing invoice via preferred delivery methods. Updates accounting system with invoice details and payment tracking information.

CONTROL POINT

AR clerk confirms delivery method succeeded, whether EDI 210, portal upload, or email, and reissues anything rejected by the customer's payables system.

SYSTEMS Axon TMS McLeod LoadMaster

DELIVERABLES

- Carrier payment invoice
- Customer billing invoice
- Posted accounting entries
- Variance audit record

KEY METRICS

- Invoice processing time per load
- Billing accuracy rate
- Days to collection
- Variance queue volume

IMPLEMENTATION CHECKS

- POD required before invoice release
- Variance thresholds by charge type
- Approval routing for held invoices
- Audit trail on rate overrides
- Customer billing profile permissions

NEXT STEP

Turn this blueprint into an implementation plan.

Map each stage to your own systems, permissions, and approval routing before selecting tools or building automation.

packfoundry.app/assessment

FREIGHT BROKERAGE WORKFLOW PACKS AND A FREE ASSESSMENT