

HubTran UPDATES FOR 20.2

NEW CONTROL FILE OPTIONS

Sys Admin | Brokerage | HubTran | HubTran Control

- Ready to bill – allows you to choose whether the ready to bill checkbox on the order is checked automatically when an approved invoice from HubTran is processed.
- Ready to pay – allows you to choose whether the ready to pay (status) value on any unpaid settlements and pending deductions are set to “Process” when an approved invoice from HubTran is processed.
- When ready checkbox is checked, and an approved invoice from HubTran is processed in PowerBroker:
 - If unpaid settlements or pending deductions already exist, the ready to pay flag value is set to “Y” (if it can be - considering payees with payment method of LoadPay/TriumphPay as well as whether the payee is currently being processed in Interactive Settlement)
 - As movements are being transferred to settlement, the ready to pay flag value is set to “Y” for all movements having a value in the hubtran_approved_inv_date field (if it can be - considering payees with payment method of LoadPay/TriumphPay as well as whether the payee is currently being processed in Interactive Settlement)

Transaction type	Table name	Field name	Filter field	Filter value	Reference field	Active
Carrier	payee	address1	non_office_emp	Y		Yes
Carrier	payee	address2	non_office_emp	Y		Yes
Carrier	factoring_company	address	non_office_emp	Y	drs_payee.factoring_co...	Yes
Carrier	payee	check_address2	non_office_emp	Y		Yes
Carrier	payee	check_address	non_office_emp	Y		Yes
Carrier	payee	check_city	non_office_emp	Y		Yes
Carrier	payee	check_name	non_office_emp	Y		Yes
Carrier	payee	check_zip	non_office_emp	Y		Yes
Carrier	factoring_company	city			drs_payee.factoring_co...	Yes
Carrier	payee	city	non_office_emp	Y		Yes
Carrier	drs_payee	dot_number	type_of	R		Yes
Carrier	contact	email	parent_row_type	P 5	parent_row_id	Yes
Carrier	factoring_company	email			drs_payee.factoring_co...	Yes
Carrier	payee	email	non_office_emp	Y		Yes
Carrier	drs_payee	factoring_compan...	type_of	R		Yes
Carrier	drs_payee	icc_number	type_of	R		Yes
Carrier	contact	is_active	parent_row_type	P 5	parent_row_id	Yes
Carrier	factoring_company	name			drs_payee.factoring_co...	Yes

DOCUMENT RETRIEVAL ENHANCEMENTS

Updates to the schedule process have been made to download and index non-Invoice documents as well as index documents by their assigned order ID as follows:

- As the scheduled process runs, it now retrieves any non-invoice load documents approved in HubTran which are not part of an approved invoice and indexes them into Document Power
- As documents are downloaded, if they are assigned to a specific order ID, they are indexed only to that order ID. If no order ID is assigned:
 - If there is only one order for the movement, the document is indexed to that order
 - If there are multiple orders for the movement, the document is indexed to all orders associated with the movement
- Images downloaded from HubTran will be displayed in the Images tab on the Order as any other document indexed into DocumentPower does
- Once a document has been downloaded from HubTran successfully, it will not be re-downloaded unless a change is made to the document in HubTran and it is resubmitted for PowerBroker to retrieve again
- An order history comment will be added when non-invoice documents are retrieved by the scheduled process
 - No further changes occur (carrier invoice number and received date is not set and ready to bill / ready to pay values are not changed)

UPDATES TO LOAD AND SHIPMENT DATA OUTPUT

Updates include the following changes to the reference values so that they appear in the references section of the HubTran interface:

LOAD AND SHIPMENT OUTPUT

- Operations user reference is updated to include the email address for the operations user on the movement
- The user ID and email address for the dispatcher user on the movement
- The user ID and email address for the collections user on the customer screen (bill-to on order)
- The user ID and email address for the salesperson user on the customer screen (bill-to on order)
- The revenue code value for each order associated with the load

SHIPMENT OUTPUT

- Customer billing line items/assessorial charges on the order

LOAD OUTPUT

- The payment method of the payee (override_payee_id in movement)
- The pay method ('Flat', 'Distance', 'CWT', 'Tons') for the movement, if not transferred to settlement, otherwise the unpaid settlement record

MULTIPLE APPROVED INVOICES PER MOVEMENT

The interface has been enhanced to allow multiple invoices to be downloaded for a movement in the event that multiple carriers need to send separate invoices or the same carrier sends an adjusted invoice or balance due statement which need to be processed automatically in PowerBroker.

As the scheduled process runs to retrieve approved invoices, if the HubTran Approved Invoice Date field is blank on the movement:

- The HubTran Approved Invoice Date field and HubTran Ok to Pay Date field on the movement and on any existing unpaid settlements and pending deductions is updated only if the payee ID on the approved invoice matches the override payee ID on the movement.
- The carrier invoice number field and carrier invoice received date field on the order, movement, settlement, and pending deductions records are only updated if the payee ID on the approved invoice matches the override payee ID on the movement.

- The process to evaluate setting the ready to pay flag value on any existing unpaid settlements or pending deductions for the matched movement and payee should follow the same logic as it does currently.

If the HubTran Approved Invoice Date field is not blank on the movement:

- Additional approved invoices where the payee ID matches the override payee ID on the movement are processed as follows:
 - The HubTran Approved Invoice Date field and HubTran Ok to Pay Date field on the movement and on any existing unpaid settlements and pending deductions for the payee is not updated.
 - The carrier invoice number and carrier invoice received date are not updated on order, movement, settlement, or pending deduction records, even if the invoice number is different.
 - An invoice exception record with "Major" severity is created indicating "A potential duplicate approved invoice has been received for this load. Documents and amounts may need to be verified and adjusted or removed accordingly."
- Additional approved invoices for payees other than override payee on the movement are processed as follows:
 - The HubTran Approved Invoice Date field and HubTran Ok to Pay Date field on the movement and on any existing unpaid settlements and pending deductions for the payee matching the payee ID on the invoice being processed is not updated.
 - If an unpaid settlement or pending deduction record exists for the payee matching the payee ID on the invoice being processed, the carrier invoice number, carrier invoice received date, and ready to pay flag value are only updated on the matched records.
 - The carrier invoice number field and invoice received date field are not updated on the order or movement.
 - An invoice exception record with "Major" severity is created indicating "An invoice from a carrier other than the primary carrier on the load has been received. Documents and amounts may need to be verified and adjusted or removed accordingly."

