

# Transportation Management WebSettle Course

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## Course Synopsis

The TMS WebSettle Course provides an in-depth learning opportunity in the setup and use of the freight settlement module within the TMS. Students will receive instruction in both administrative setup in using WebSettle and the functional workflow of using it to manage freight payables. Specific topics in the 1/2 day course are listed below. This is a live instructor-led, web-based training.

## Who Should Attend?

This course is designed for those users of the TMS who are assigned the role of managing the freight payable or settlement functions for their organization. General the TMS administrators would also benefit from this course to learn the setup variations. General the TMS Super Users would also benefit from this course to provide functional support to the freight payable users.

## Prerequisites

We strongly recommend that attendees attend the TMS Fundamentals functional foundation course prior to taking this course, or have at least one year of broad user experience within the TMS application.

## Learning Objectives

After attending this class, students should be able to:

- Assist with managing administrative settings within the WebSettle module
- Understand the payable integration file and the data available within it
- Understand Carrier integrations supporting the payable function
- Enable Carriers and Load Groups to define what loads are eligible to be processed in the WebSettle module
- Manage the transfer of loads from Execution to WebSettle
- Diagnose loads that will not transfer to WebSettle
- Setup Discrepancy rules and process loads that violate the rules
- Process Payable Batches utilizing all variations and options within the WebSettle module
- Manually match invoices in the TMS using the WebSettle Module
- Generate Reports from WebSettle data
- Manage corrected invoices
- Manage Balance Due Charges
- Manage Miscellaneous Charges

## Course Agenda

- WebSettle Integrations
- Carrier Integrations
- Module General Administration
- Rate Change Requests
- Transferring Loads to WebSettle
- Auto-Match payables processing
- Exception Management
- Manual Match payables processing
- WebSettle Reporting

## Cost

\$500 (due at registration)

## What to Expect

- After enrollment, students will receive a link to the web meeting for the training. It is recommended that students save this meeting notice in their calendar with a reminder. A phone number for the associated conference call will be provided when the student logs in at the beginning of the course.
- Students will receive a soft copy of the slide presentation from the course and a set of self-guided exercises that can be performed after the course in a test environment.

**For More Information:** [BlujayU@BlujaySolutions.com](mailto:BlujayU@BlujaySolutions.com)

**Enroll at** [www.BlujaySolutions.com/Training](http://www.BlujaySolutions.com/Training)