

# strategy *Live!*

Totally Internet Based Software

## Agent Settlements

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## Enter Agents

Go to Administration > File Maintenance > Agents. Click the Create button to enter a new agent. A blank Agent Editing window will open.

## Agent Information Tab

The screenshot shows a web browser window titled "Agent Editing - Windows Internet Explorer". The main content area has two tabs: "Agent Information" (selected) and "Settlement Information". The "Agent Information" tab contains a form with the following fields:

<b>Number</b>	<input type="text"/>	<b>Status</b>	Available
<b>Name</b>	<input type="text"/>	<b>Agent Type</b>	Company Agent
<b>Street</b>	<input type="text"/>	<b>Company #</b>	<input type="text"/>
<b>Street 2</b>	<input type="text"/>		
<b>City</b>	<input type="text"/>	<b>State</b>	<input type="text"/>
<b>Phone</b>	<input type="text"/>	<b>Zip</b>	<input type="text"/>
<b>Comments</b>	<input type="text"/>		

At the bottom of the form are three buttons: "Create", "Create and New", and "Cancel".

Fill out the fields according to the following information:

**Number** – This is a code assigned to the agent. If the agent is a user then this code must match the user file.

**Status** – The current status of the agent.

**Name** – The agent's name.

**Agent Type** – Either a Company Agent (in-house) or Outside Agent (third party).

**Street** – Agent's address

**Company #** - Assign if the agent is working for a certain company on your system.

**Street 2** – Agent's address

**City** – Agent's city

**State** – Agent's state

**Zip** – Agent's zip code

**Phone** – Agent's phone

**Fax** – Agent's fax

**Comments** – Administrative comments.

## Settlement Information Tab

Agent Editing - Windows Internet Explorer

Agent Information Settlement Information

Number  Payroll Hold Flag

Federal ID-#/SSN

A/P Information

Name For 1099  1099?  Days To Pay

Settlements

	Rate	Charge Type
Sales	<input type="text"/>	<input type="text"/>
Booking	<input type="text"/>	<input type="text"/>
Dispatch	<input type="text"/>	<input type="text"/>

Create Create and New Cancel

debug

Fill out the fields according to the following information:

**Number** – This is a code assigned to the agent. If the agent is a user then this code must match the user file.

**Payroll Hold Flag** – Mark to hold pay to the agent.

**Federal ID #/SSN** – The agent's taxpayer id.

**Name for 1099** – The name to print on the agent's 1099.

**1099?** – Mark to send a 1099 to the agent.

**Days to Pay** – Number of days to pay the agent.

**Sales** – Pay information for the agent in the salesman field on the customer record.

**Booking** – Pay information for the agent that entered the load into the system.

**Dispatch** – Pay information for the agent that assigned the load to a carrier.

## Calculate Agent Settlement

To calculate the agent settlement, go to the Pay tab of the load and click the Estimate Pay button. You should see the agent settlement item(s) add to the pay list. Click the Save button. Print and transfer the same as carrier settlements.

Load Information - Windows Internet Explorer

Load Operations Charges Pay Comments

Load #	Carrier Invoice #	Total Payments	Total Adjustments	Payment Status
100153	<input type="text"/>	2097.42		Not Ready

Payee	Type	Description	Quantity	Rate	Payment Type	Amount	Payment Status
00001	Line Haul	Line Haul	1045.30	1.000	Per Mile	1045.30	Not Ready
00001	Line Haul	Fuel Surcharge	1.00	549.500	100 Percent	549.50	Not Ready
TRAVIS	Line Haul	Agent Settlement	3350.70	5.000	Percent	167.54	Not Ready
TRAVIS	Line Haul	Agent Settlement	3350.70	5.000	Percent	167.54	Not Ready
TRAVIS	Line Haul	Agent Settlement	3350.70	5.000	Percent	167.54	Not Ready
							Not Ready
							Not Ready
							Not Ready

Click "Refresh Load" to recalculate the Amount column after editing a Pay Item.

Estimate Pay View Segments

Save Refresh Market Rate Fuel Cancel

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