








This screen allows you to maintain the charges in the system.

You can query data by and/or choose to display data as follows:

- *Association* - the level to which the charge is associated.
- *Name* - the name of the charge.
- *Active*.
- *Created By*.
- *Created Date*.
- *Last Updated By*.
- *Last Updated Date*.
- *Last Active Change By*.
- *Last Active Change Date*.
- *Last Process Id*.
- *Update Counter*.

The following actions are available on the Details panel:

-  **New** - create a new record.
-  **Save** - save a new record or changes to an existing record.
-  **Delete** - delete an existing record.
-  **Help** - help on this screen.
-  **Undo** - undo change made since last save.
-  **Clear** - clear all fields.
-  **Toggle** - toggle display of all accordion headers.


You can change or add the following information:

- *Association* - the level to which the charge is associated.
- *Name* - the name of the charge.

## Charge Item section

You can set the change items for each charge.


You can add charge items by clicking the  **New** button in the section.

You can edit an existing charge item by selecting the charge item row in the table and then clicking the  **Edit** button in the section header.

The screen will display a pop-up window to enter the following:


- *Item*.
- *Name*.

You can save your changes with the **Save** button, or discard your changes by closing the window.

You can delete an existing charge item by selecting the charge item row in the table and then clicking the  **Delete** button in the section header.

## Notes section

You can add notes through the Notes section.

You can click the  **New** button in the Notes section to create a new note. This will be tagged with your user name and date/time.

Any notes may be removed by clicking the **x** in the corner of the note.

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# 1 Contract Type

This screen allows you to maintain the contract types in the system. These are used when you create contracts in the **Contracts** screen.

You can query data by and/or choose to display data as follows:

- *Code* - the contract type code.
- *Description* - the contract type description.
- *Active*.
- *Created By*.
- *Created Date*.
- *Last Updated By*.
- *Last Updated Date*.
- *Last Active Change By*.
- *Last Active Change Date*.
- *Last Process Id*.
- *Update Counter*.

The following actions are available on the Details panel:

-  **New** - create a new record.
-  **Save** - save a new record or changes to an existing record.
-  **Delete** - delete an existing record.
-  **Help** - help on this screen.
-  **Undo** - undo change made since last save.
-  **Clear** - clear all fields.
-  **Toggle** - toggle display of all accordion headers.

You can change or add the following information:

- *Code* - the contract type code.
- *Description* - the contract type description.










## 2 Contracts

This screen allows you to maintain the contracts in the system. Contracts are created between the **Organisation** and **Carriers** or **Customer** to control finance options.

You can query data by and/or choose to display data as follows:




- *Code.*
- *Name.*
- *Type Code* - the contract type, defining the type of counter party.
- *Local Party Code* - the organisation to whom the contract pertains.
- *Counter Party Code* - the carrier or customer to whom the contract pertains.
- *Currency Code.*
- *Effectivity Date From.*
- *Effectivity Date To.*
- *Active.*
- *Created By.*
- *Created Date.*
- *Last Updated By.*
- *Last Updated Date.*
- *Last Active Change By.*
- *Last Active Change Date.*
- *Last Process Id.*
- *Update Counter.*

The following actions are available on the Details panel:

-  **New** - create a new record.
-  **Save** - save a new record or changes to an existing record.
-  **Delete** - delete an existing record.
-  **Help** - help on this screen.
-  **Undo** - undo change made since last save.
-  **Clear** - clear all fields.
-  **Toggle** - toggle display of all accordion headers.

You can change or add the following information:


### 2.1 Details section




- *Code* - the contract code.
- *Name* - the contract name.
- *Type Code* - the contract type, defining the type of counter party. You can maintain the values in the **Contract Type** screen.
- *Organisation* - a drop-down list of organisations to select the organisation to whom the contract pertains. You can maintain the values in the **Organisation** screen.
- *Counter Party Code* - the customer or carrier to whom the contract pertains. This will be labelled as "Customer Code" or "Carrier Code" depending on your selection of Type Code above. You can maintain the values in the **Customer** and **Carriers** screens respectively. You can enter the customer or carrier code, or look up the code by clicking the  **Lookup** button to the right of the value entry. The screen will display a pop-up window of carriers or customers. You can select a code by clicking on the row or cancel entry by closing the window.
- *Currency Code* - a drop-down list of all currencies in the system. You can maintain the values in the **Currencies** screen.
- *Effectivity Date From* - the date from which the contract is effective. You can enter the date directly or use a  **Calendar** pop-up to select the date.
- *Effectivity Date To* - the date to which the contract is effective. You can enter the date directly or use a  **Calendar** pop-up to select the date.




## 2.2 = Rate Cards section

You can set the rate card that is applied to this contract.

You can add a rate card by clicking the  **New** button in the section. The screen will display a pop-up window to enter the following:


- *Rate Card Code* - the rate card code. You can enter the rate card code directly, or look up the code by clicking the  **Lookup** button to the right of the value entry. The screen will display a pop-up window of rate cards. You can select a code by clicking on the row or cancel entry by closing the window.
- *Effectivity Date From* - the date from which the rate card is effective. You can enter the date directly or use a  **Calendar** pop-up to select the date.
- *Effectivity Date To* - the date from which the rate card is effective. You can enter the date directly or use a  **Calendar** pop-up to select the date.

You can save your changes with the **Save** button, or discard your changes with the **Close** button.

You can delete an existing rate card by selecting the rate card row in the table and then clicking the  **Delete** button in the section header.

## 2.3 Notes section

You can add notes through the Notes section.

You can click the  **New** button in the Notes section to create a new note. This will be tagged with your user name and date/time.

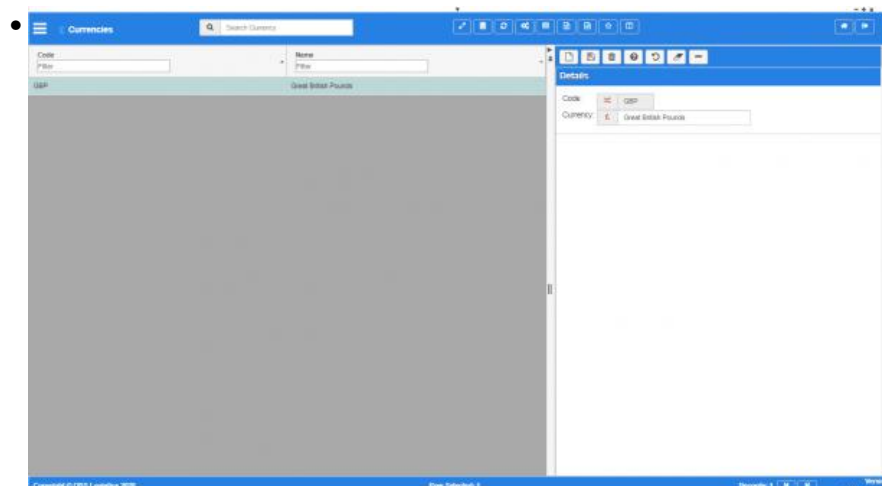
Any notes may be removed by clicking the **x** in the corner of the note.



### 3 Currencies

This screen allows you to maintain the currencies in the system. Currencies are used in many places, including:

- Countries.
- Supplier.
- Customer.
- Carriers.



*Currencies maintenance*

You can query data by and/or choose to display data as follows:

- *Code* - the currency code.
- *Name* - the currency.
- *Active*.
- *Created By*.
- *Created Date*.
- *Last Updated By*.
- *Last Updated Date*.
- *Last Active Change By*.
- *Last Active Change Date*.
- *Last Process Id*.
- *Update Counter*.

The following actions are available on the Details panel:

- **New** - create a new record.
- **Save** - save a new record or changes to an existing record.
- **Delete** - delete an existing record.
- **Help** - help on this screen.
- **Undo** - undo change made since last save.
- **Clear** - clear all fields.
- **Toggle** - toggle display of all accordion headers.

You can change or add the following information:

- *Code* - the currency code.
- *Name* - the currency.










## 4 Payment Method

This screen allows you to maintain the payment methods in the system. These are used when you create carriers in the **Carriers** screen.

You can query data by and/or choose to display data as follows:

- *Code* - the payment method code.
- *Description* - the payment method description.
- *Active*.
- *Created By*.
- *Created Date*.
- *Last Updated By*.
- *Last Updated Date*.
- *Last Active Change By*.
- *Last Active Change Date*.
- *Last Process Id*.
- *Update Counter*.

The following actions are available on the Details panel:

-  **New** - create a new record.
-  **Save** - save a new record or changes to an existing record.
-  **Delete** - delete an existing record.
-  **Help** - help on this screen.
-  **Undo** - undo change made since last save.
-  **Clear** - clear all fields.
-  **Toggle** - toggle display of all accordion headers.

You can change or add the following information:

- *Code* - the payment method code.
- *Description* - the payment method description.










## 5 Rate Cards

This screen allows you to maintain the charges in the system.





You can query data by and/or choose to display data as follows:

- *Code.*
- *Name.*
- *Service Code.*
- *Range Type.*
- *Range From.*
- *Range To.*
- *Active.*
- *Created By.*
- *Created Date.*
- *Last Updated By.*
- *Last Updated Date.*
- *Last Active Change By.*
- *Last Active Change Date.*
- *Last Process Id.*
- *Update Counter.*

The following actions are available on the Details panel:

-  **New** - create a new record.
-  **Save** - save a new record or changes to an existing record.
-  **Delete** - delete an existing record.
-  **Help** - help on this screen.
-  **Undo** - undo change made since last save.
-  **Clear** - clear all fields.
-  **Toggle** - toggle display of all accordion headers.

You can change or add the following information:


- *Code.*
- *Name.*
- *Service Code.*
- *Range Type* - a drop-down list of range types. You can choose from:None (the default); Zone; Postcode.
- *Range From* - the screen only prompts for this field if you have select a range type which is not "None".  
Depending on the selection, the screen will prompt you to enter one of the following:
  - ♦ *Zone From* - the zone from. You can maintain these in the [Location Zones](#) screen. You can look up the available codes using the  **Lookup** button to the right of the value entry. The screen will display a pop-up window listing the available values. You can filter the values on the list by typing in the provided filter box and clicking the Filter button. You can select a value from the list, or cancel the look up by closing the window.
  - ♦ *Postcode From* - the postcode from. You can look up the available codes using the  **Lookup** button to the right of the value entry. The screen will display a pop-up window listing the available values. You can filter the values on the list by typing in the provided filter box and clicking the Filter button. You can select a value from the list, or cancel the look up by closing the window.
- *Range To* - the screen only prompts for this field if you have select a range type which is not "None". Depending on the selection, the screen will prompt you to enter one of the following:
  - ♦ *Zone To* - the zone to. You can maintain these in the [Location Zones](#) screen. You can look up the available codes using the  **Lookup** button to the right of the value entry. The screen will display a pop-up window listing the available values. You can filter the values on the list by typing in the provided filter box and clicking the Filter button. You can select a value from the list, or cancel the look up by closing the window.
  - ♦ *Postcode To* - the postcode to. You can look up the available codes using the  **Lookup** button to the right of the value entry. The screen will display a pop-up window listing the available values. You can filter the values on the list by typing in the provided filter box and clicking the Filter button. You can select a value from the list, or cancel the look up by closing the window.







## 5.1 Breaks section

You can set the breaks for each charge.


You can add breaks by clicking the  **New** button in the section.

You can edit an existing break by selecting the break row in the table and then clicking the  **Edit** button in the section header.


The screen will display a pop-up window to enter the following:

- *Code*.
- *Name*.
- *Item* - the rate item. You can enter the code or use the  **Lookup** button to the right of the value entry. The screen will display a pop-up window displaying all configured charge items in the system. You can select an item and click the **Save** button, or discard by closing the window.
- *Unit From* - the range of the break.
- *Unit To* - the range of the break.

You can save your changes with the **Save** button, or discard your changes by closing the window.

You can delete an existing break by selecting the break row in the table and then clicking the  **Delete** button in the section header.


You can add charges to a break using the **+ Add** button on the section header.

You can edit an existing break charge by selecting the break charge row in the table and then clicking the  **Edit** button in the section header.

The screen will display a pop-up window to enter the following:


- *Code*.
- *Rate*.
- *Rate Basis* - Values: Per Unit; Per Item; Fixed Charge.
- *Minimum Charge*.
- *Maximum Charge*.

You can save your changes with the **Save** button, or discard your changes by closing the window.

You can delete an existing break charge by selecting the break charge row in the table and then clicking the  **Delete** button in the section header.

## 5.2 Notes section

You can add notes through the Notes section.

You can click the  **New** button in the Notes section to create a new note. This will be tagged with your user name and date/time.

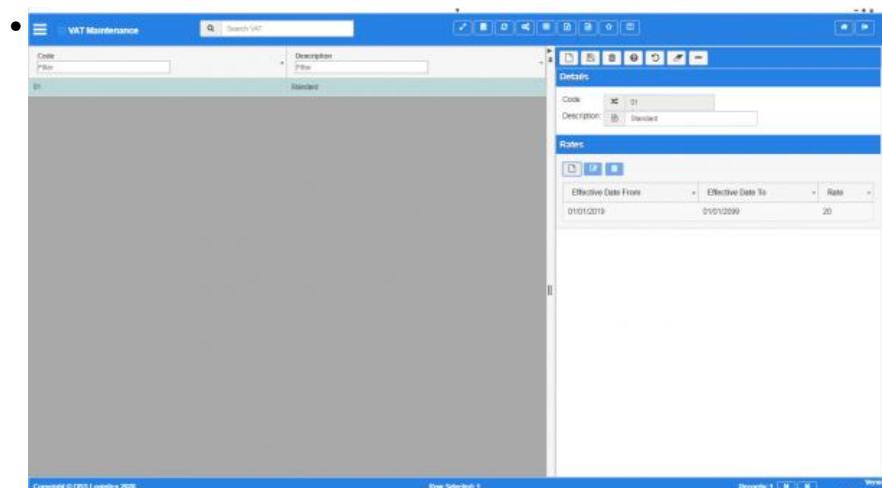
Any notes may be removed by clicking the **x** in the corner of the note.



## 6 VAT Codes

This screen allows you to maintain the VAT codes in the system. These are used in various places, including:

- **Supplier.**
- **Customer.**
- **Carriers.**



VAT codes maintenance

You can query data by and/or choose to display data as follows:

- **Code** - the vat rate code.
- **Description** - the VAT rate description.
- **Active**.
- **Created By**.
- **Created Date**.
- **Last Updated By**.
- **Last Updated Date**.
- **Last Active Change By**.
- **Last Active Change Date**.
- **Last Process Id**.
- **Update Counter**.

The following actions are available on the Details panel:

- **New** - create a new record.
- **Save** - save a new record or changes to an existing record.
- **Delete** - delete an existing record.
- **Help** - help on this screen.
- **Undo** - undo change made since last save.
- **Clear** - clear all fields.
- **Toggle** - toggle display of all accordion headers.


You can change or add the following information:


- **Code** - the vat rate code.
- **Description** - the VAT rate description.





## 6.1 Rates section

You can set the rate and dates when this VAT rate is applicable.


You can add the dates by clicking the  **New** button in the section.

You can edit dates by clicking the row in the table and then clicking the  **Edit** button in the section.

The screen will display a pop-up window to enter the following:

- *Effective Date From* - you can enter a date or use the  **Calendar** lookup provided to the right of the value entry.
- *Effective Date To* - you can enter a date or use the  **Calendar** lookup provided to the right of the value entry.
- *Rate*.

You can save your changes with the **Save** button, or discard your changes with the **Close** button.

You can delete an rate by selecting the transport unit row in the table and then clicking the  **Delete** button in the section header.

