

Rate Cards

Aptean Ltd
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1 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.




1.1 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.

1.2 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.

