

# **Rate Cards**

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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.

