


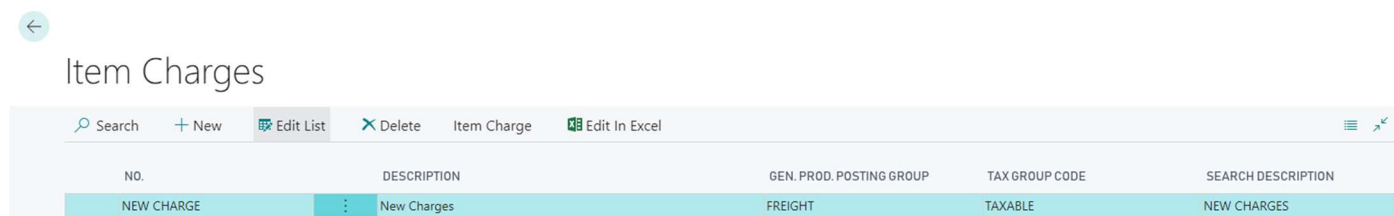


## Auto Charges Documentation

Below you will find instructions on how to define auto charges for vendors, customers and items. The instructions will provide you with guidance on how to automatically apply charges to either a sales order or a purchase order. For example, you want to add a \$50.00 charge on all sales orders for customer 5000. They will, also, provide further guidance on how to automatically apply charges to sales orders or purchase order for an item for a specific customer or vendor.


### Create an Item Charge Profile

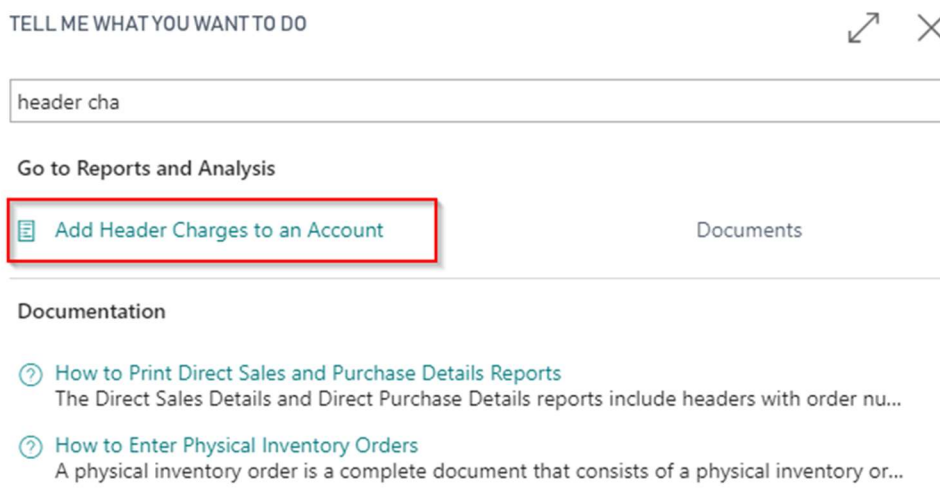
1. Click on the  icon
2. Enter **Item Charges**
3. Click **+New**
4. Under **No.** Enter the name of the new charge
5. Under **Description**, enter the description for the charge
6. Under **Gen. Prod. Posting. Group**, select the posting group for this charge
7. Under **Tax Group Code**, select the applicable Tax Group Code.



### Add header charges to a vendor and/or customer

The below instructions will define how to add a charge to a sales order or a purchase order. The charges will automatically appear once you select the customer or the vendor on the purchase order or the sales order.

1. Click on the  icon
2. Type **Add Header Charges to an Account**
3. Under **Class** select:
  - a. **Customer:**  
Select this if you would like to add charges to a Customer
  - b. **Vendor:** Select this if you would like to add charges to a Vendor





## Add Header Charges to an Account

CLASS	ACCOUNT NUMBER	CHARGE NAME	CHARGE TYPE	CHARGE RATE
Customer	50000	NEW CHARGE	Flat	50.00

4. In the **Account Number** select the Vendor or the Customer you would like to add the header charge to.
5. In the **Charge Name** select the charge you would like to add to the Customer invoices.
6. In the **Charge Type** select:
  - a. **Percent:** Select this if you would like the charge added as a percentage.
  - b. **Pieces:** Select this if the charge is per pieces.
  - c. **Flat:** Select this is this is a flat fee.
7. In the **Charge rate** enter the amount you would like to associate with this charge.
8. Once you have entered this data and go to create a sales order or a purchase order the charges will be automatically applied as you can see in the example below.



## S-ORD101013 · Relecloud

Process	Report	Posting	Request Approval	More options
General				
Customer Name	Relecloud	Due Date	4/23/2018	
Contact	Jesse Homer	Requested Deliver...		
Posting Date	4/9/2018	External Documen...		
Order Date	4/9/2018			

Lines	Manage	More options			
TYPE	NO.	DESCRIPTION	QUANTITY	UNIT PRICE EXCL. TAX	TAX GROUP CODE
Charge (Item)	NEW CHARGE	Header Charge f...	1	50.00	TAXABLE

9. Add any Items required on the sales Order.
10. Before you can post the sales order or purchase order you need to assign the charges.
11. Scroll over to the right in the **Lines** section of the sales order. On the **Charge (item)** line, under **Qty. to assign** click on the **0** (Highlighted in red).
12. The **Edit- Item Charge assignment** page will pop up.
13. Click on **Item Charge**
14. Click on **Suggest Item Charge Assignment**



Manage **1** Item Charge | More options

Get Receipt Lines **2** Suggest Item Charge Assignment...

APPLIES-TO DOC. TYPE	APPLIES-TO DOC. NO.	APPLIES-TO DOC. LINE NO.	ITEM NO.	DESCRIPTION	QTY. TO ASSIGN	QTY. ASSIG	AMOUNT TO ASSIGN
Order	106010	10001	1900-S	PARIS Guest Chair, black	2		60.00

	ASSIGNABLE	TO ASSIGN	REM. TO ASSIGN
Total (Qty.)	2	2	0
Total (Amount)	60	60	0

Close

15. Click **Close**.
16. Click on **Posting** at the top of the sales order form
17. Click **Post...**
18. Choose **Ship, Invoice** or **Ship and Invoice**
19. Click **OK**

### Adding Auto Charges to an Item

The below instructions will define how to add a charge to an item for a specific customer or vendor to a sales order or a purchase order. The charges will automatically appear once you enter the quantity on an item line.

### Setup Account/Item relations

1. Click on the icon
2. Type **Set up Account/Item relations**
3. Select **+New**
4. Under **Class**, select:
  - a. **Customer**: Select this if you would like to add charges to a Customer
  - b. **Vendor**: Select this if you would like to add charges to a Vendor
5. In the **Account Number** select the Vendor or the Customer you would like to add the charge to.
6. In the **Charge Name**, select the charge you selected in step 5 of Adding Auto charges to an item.

### Setup Charges on items and Assigning Charges

1. Click on the icon
2. Type **Add Charges to Items Page**

TELL ME WHAT YOU WANT TO DO

Add charges to items page

Go to Reports and Analysis

Add Charges to Items Page Documents



3. Under **Class** select:
  - a. **Customer**: Select this if you would like to add charges to a Customer
  - b. **Vendor**: Select this if you would like to add charges to a Vendor
4. Under **Item Number**, select the item you would like to associate the charge with.
5. In the **Charge Name**, select the charge you would like to add to the Customer invoices.
6. In the **Charge Type**, select:
  - a. **Percent**: Select this if you would like the charge added as a percentage.
  - b. **Pieces**: Select this if the charge is per pieces.
  - c. **Flat**: Select this if this is a flat fee.

←

## Add Charges to Items Page

Search + New Edit List Delete Edit In Excel

**Add Item Charges**

CLASS	ITEM NUMBER	CHARGE NAME	CHARGE TYPE	CHARGE RATE
Customer	1896-S	NEW CHARGE	Pieces	20.00

7. Once you go and create a Sales order for item 1896-S for Customer 5000. It will automatically add the charge per pieces based on how many items you have shipped. The charges will auto-populate once you have entered in a quantity for the item in the Sales order.

←

## S-ORD101015 · Relecloud

Process Report Posting Request Approval More options

**General** Show more

Customer Name	Relecloud	Due Date	4/23/2018
Contact	Jesse Homer	Requested Delivery D...	
Posting Date	4/9/2018	External Document No. ...	
Order Date	4/9/2018		

**Lines** Manage More options

TYPE	NO.	DESCRIPTION	QUANTITY	UNIT PRICE EXCL. TAX	TAX GROUP CODE	RESERVE QUANTIT
Charge (Item)	NEW CHARGE	Item Auto Charg...	2	20.00	TAXABLE	
Item	1896-S	ATHENS Desk	2	1,503.40	TAXABLE	

8. Before you can post the sales order or purchase order you need to assign the charges.
9. Scroll over on the **Charge (item)** line, under **Qty. to assign** click on the **0**.
10. The **Edit- Item Charge assignment** page will pop up.
11. Click on **Item Charge**



## 12. Click on **Suggest Item Charge Assignment**

Manage **1** Item Charge | More options

Get Receipt Lines **2** Suggest Item Charge Assignment...

APPLIES-TO DOC. TYPE	APPLIES-TO DOC. NO.	APPLIES-TO DOC. LINE NO.	ITEM NO.	DESCRIPTION	QTY. TO ASSIGN	QTY ASSIG	AMOUNT TO ASSIGN
Order	106010	10001	1900-S	PARIS Guest Chair, black	2		60.00

	ASSIGNABLE	TO ASSIGN	REM. TO ASSIGN
Total (Qty.)	2	2	0
Total (Amount)	60	60	0

Close

13. Click **Close**.
14. Click on **Posting** at the top of the sales order form
15. Click **Post...**
16. Choose **Ship, Invoice** or **Ship and Invoice**
17. Click **OK**