Cet article n'est pas encore disponible dans votre langue. Vous lisez la version anglaise.

Charge Templates - Introduction

This article gives an overview of Charge Templates in Rates; what are they and how to configure them.

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What is a Charge Template?

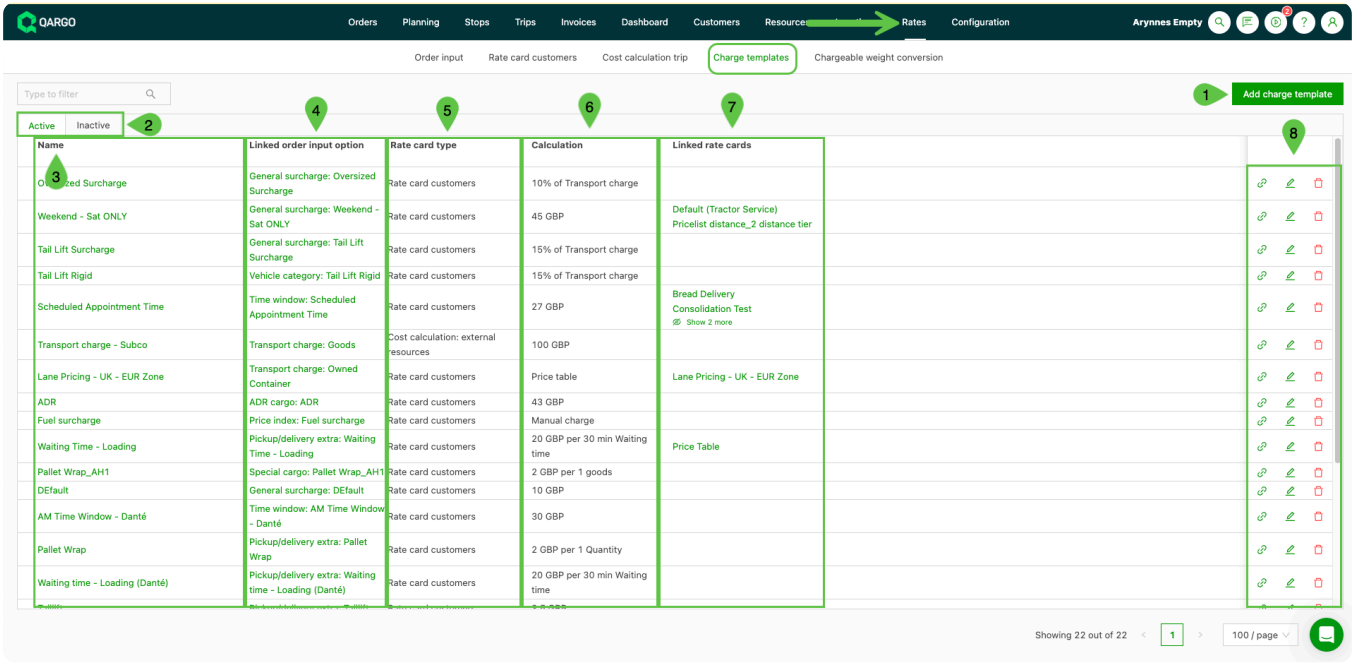
A Charge Template is a standard price template, aimed at streamlining the process of configuring price calculations across multiple price lists. Templates can be created for both Transport Charges, Surcharges and Costs. Charge templates offer a significant improvement to Rate Cards by offering more flexibility and easier updates to customer rate cards when:

- there is a set of base price calculations, where each customer may need slight adjustments to specific calculations.
- creating a template, you can define base price calculations that can be used as a starting point, making it easier to compare between template prices and customer-specific prices.

Charge Template screen.

Navigate to **RATES.** There is a new submenu ***'Charge Template'***. The screen will populate with any existing charges and will show these as Templates.

NOTE: There is no change to how the charge has been configured.



The screen will display the following:

1. **Add charge template.** Click here to setup a **NEW** charge template
2. **Status tabs.** The default view is for Active templates. To view historical templates click Inactive.
3. **Name.** This the Name of the specific charge; this is added when the charge is first setup. Clicking the name will open the **Charge details** page. It is possible to edit the charge details from this page.

4. **Linked order input option.** This shows how the charge was originally configured, ie: under Rates>Order Input: General Surcharge, etc. Clicking the name, will open the Charge details page. It is possible to edit the charge details from this page.

    1. **The Linked order input option cannot be changed after the template is created, and it is not possible to copy a charge template to a different order input option.** If you need a similar template for a different order input option, you will need to create a new charge template from scratch.

5. **Rate card type.** This shows the type of price list (Sales / Cost) that the charge is associated to. 'Rate Card Customers' = Sales / Cost Calculations = Cost.

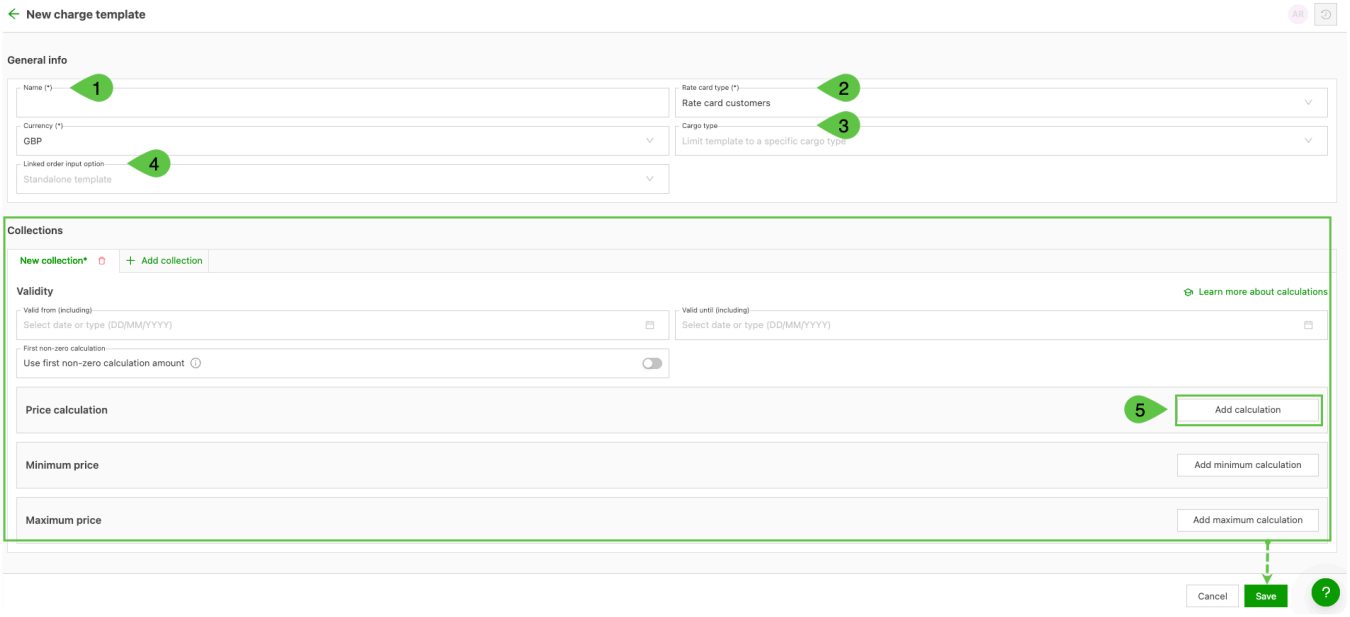
6. **Calculation.** Shows a summary of the how the charge is calculated.

7. **Linked rate cards.** If the charge template has been linked to a specific rate card this will show. When assigned to multiple rate cards, the 'eye' icon will open the charge details to show the full list of linked rate cards.

8. **Functions.** 'Chain' = opens up a list (if available) of linked rate cards to enable quick updates. 'Pencil icon' = Opens charge template to allow editing. 'Trash' = delete to remove the charge template entirely.

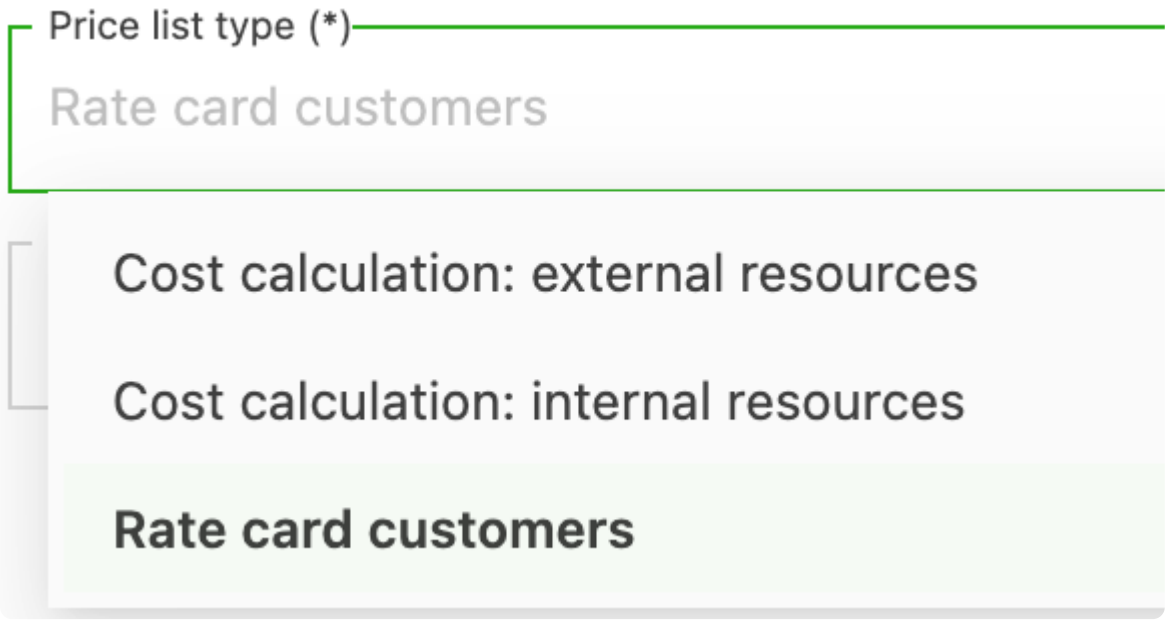
Setup a New Charge Template.

- Navigate to Rates>Charge Templates
- Click ***'Add charge template'.*** The New charge template screen will open.



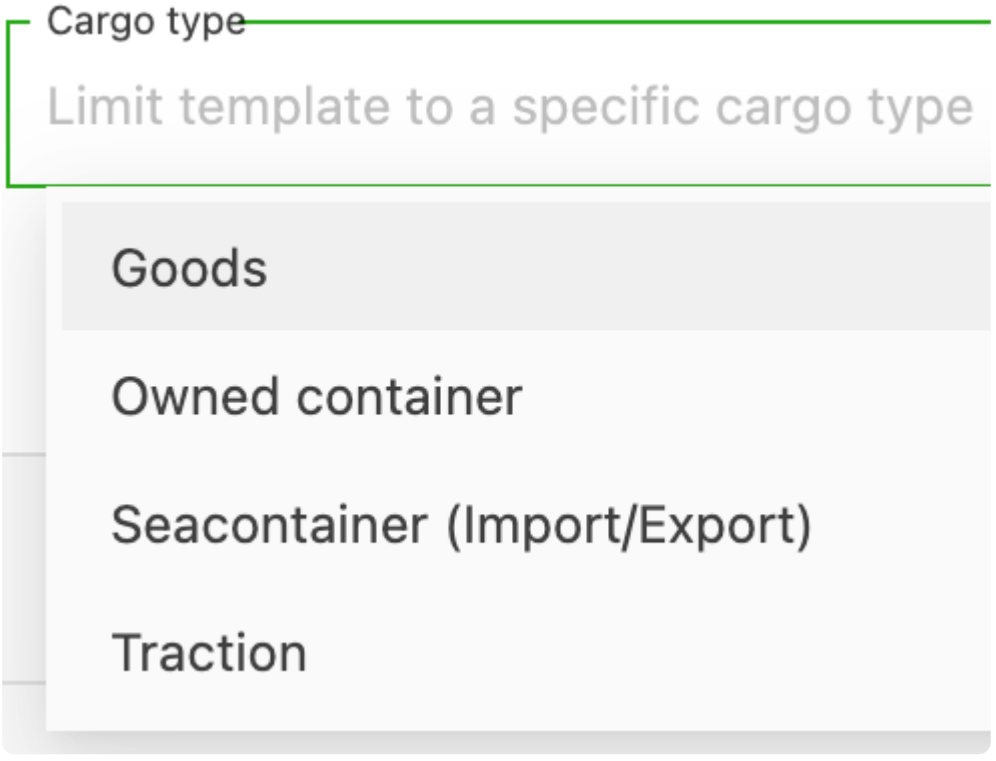
1. **Name.** Give the new charge template a Name. Use something that will easily identify the charge type and if assigned to a specific customer, this could be added to the name.

2. **Rate card type.** There are 3 options to select:

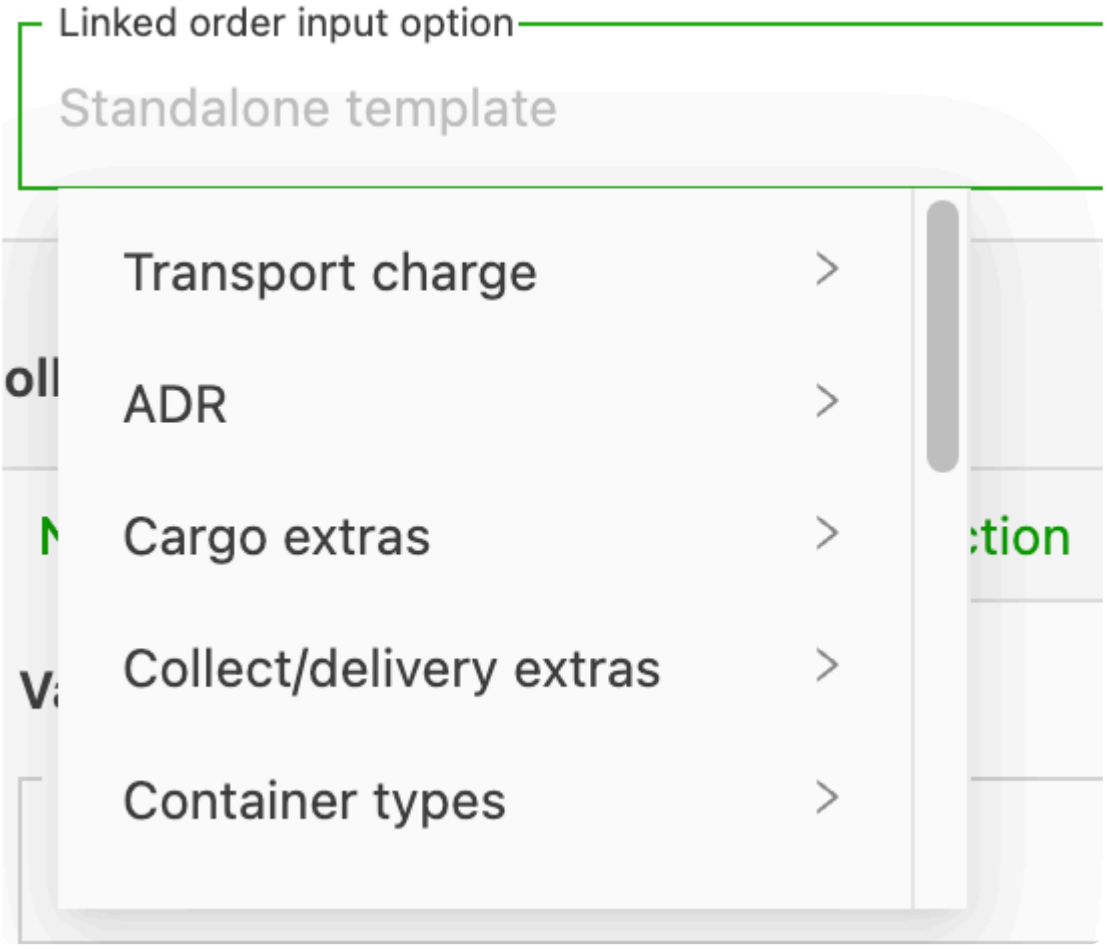


1. ***Cost calculation:*** external resource. Use this if setting up a template for a COST associated to an external resource (ie: subcontractor, etc)
2. ***Cost calculation:*** internal resource. Use this if setting up a template for a COST associated to an internal resource (ie: driver, etc)
3. ***Rate card customers.*** Use this if setting up a template for a SALES item that will be charged to a customer, generating revenue.

3. **Cargo type.** Charges must be associated to a cargo type movement.

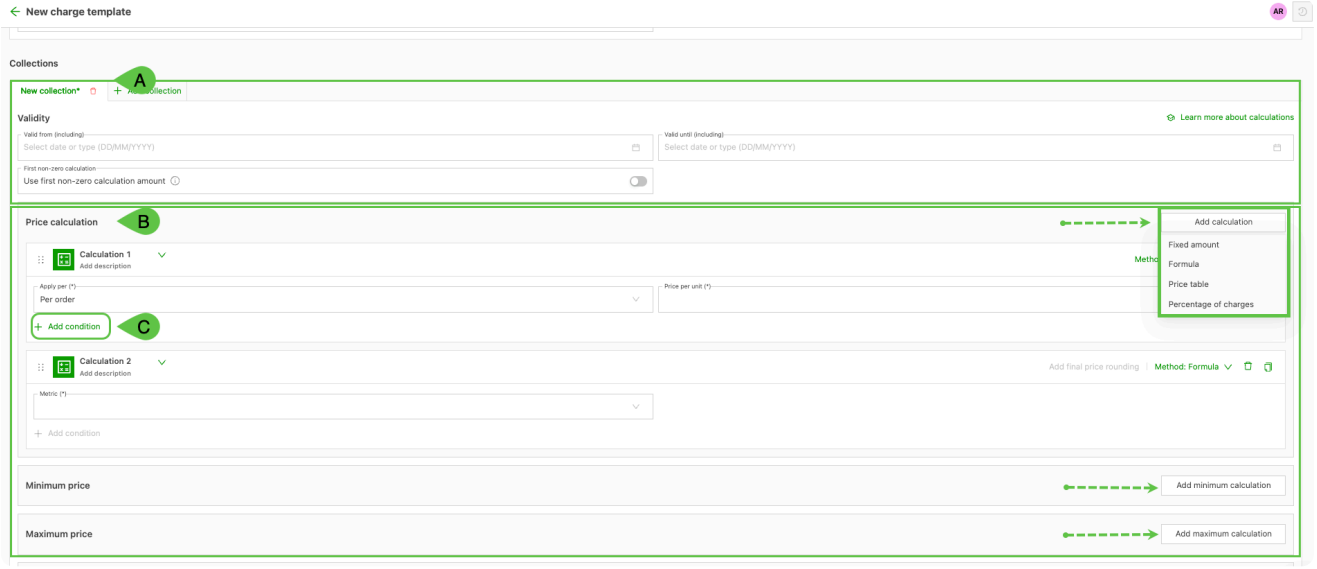


4. **Linked order input option(MANDATORY).** In order to configure the template, the charge must first be created in the general configuration / order input fields. Once the charge is added to the configuration, active options will show in the drop down and are associated to the template. ***Please note this is a MANDATORY field.***



If a charge isn't showing in the dropdown when adding charges to an order, it means the surcharge hasn't been added to the customer's pricelist yet. Charges only appear as options on an order if they already exist on the relevant rate card. Add the surcharge to the customer's rate card first under **Rates > Rate Card Customers**, then it will appear in the order dropdown.

5. **Collections:** Define the Template collection and add the calculation.



1. ***Define collection & set validity.*** Click the **'New Collection'** title. Give the collection a name that is recognisable to the charge/customer, etc. If no name is given the title will automatically change when the **'Valid from'** date is entered. If no dates are entered, the collection is set to ***'Valid on any date'***.
    1. It is possible to create multiple collections – click ***'+Add Collection'.***

2. **Collection Valid From / To dates CANNOT overlap.**
3. It is possible to create multiple calculations, with conditions within each Collection.

2. ***Add Price Calculation.*** Select the specific calculation metrics for the charge template from the drop down menu.
3. ***Add conditions (where applicable).*** Click '+Add condition' on the specific price calculation, to add any CONDITIONS that will apply to the calculation on the charge template.

Click for details how to configure the charge.

Troubleshooting

Q. Why is there a discrepancy in my charges by 0.01?
A. Qargo applies **banker's rounding** (round half to even), for instance, if a charge line has an amount of 275.006, it will be rounded to 275.00. ***This rounding method can lead to minor variances to the total amount, especially when multiple charge lines are involved.***

Q. Why doesn't the charge show in the dropdown so I can add it to the order?
A. If a charge isn't showing in the dropdown when adding charges to an order, it means the surcharge hasn't been added to the customer's price list yet. Charges only appear as options on an order if they already exist on the relevant rate card. Add the surcharge to the customer's rate card first under **Rates > Rate Card Customers**, then it will appear in the order dropdown.