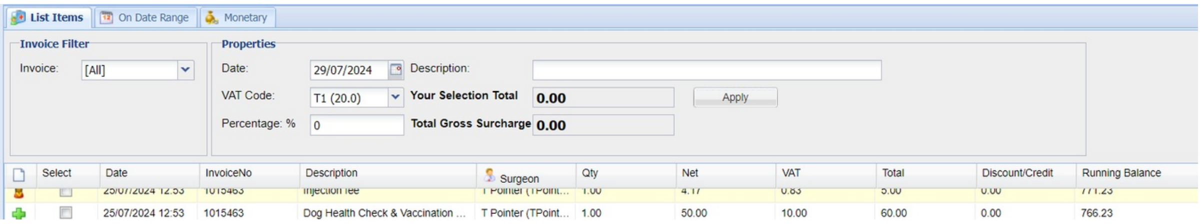
Surcharges

23/10/2024 9:55 am BST

The Surcharges screen is used to apply surcharges to a client's account.

Details

The 'Surcharges' screen can be accessed via the Accounts Screen. This screen consists of three tabs which facilitate the surcharging of Clients: 'List Items', 'On Date Range' and 'Monetary'.

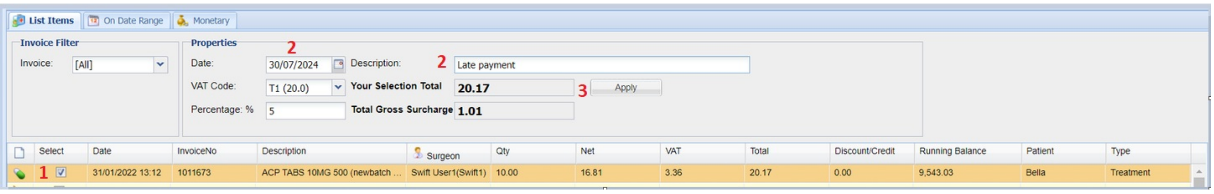


List Items tab

This tab is used to surcharge particular items from an invoice number by a percentage.

Surcharging an item

1. Select the item/s you wish to surcharge by placing a tick in the 'Select' column/s.
2. Enter a **Date**, **VAT Code**, **Percentage figure** and a **Description** for the Surcharge.
3. Select the '**Apply**' button to submit the Surcharge.
4. The surcharge transaction will be added to the Client's Account.



On Date Range tab

This tab is used to surcharge particular items between a specified date range.

Surcharging an item (between specified dates)

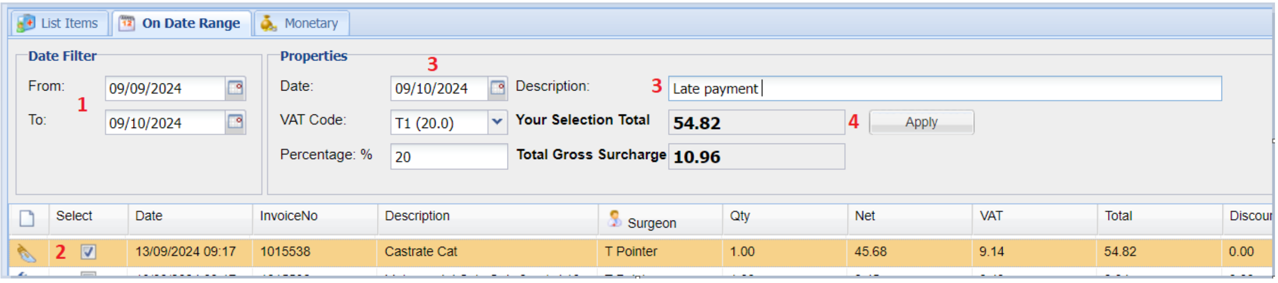
1. Specify your date range using the Dates from and to fields.

2. **Select the item/s you wish to surcharge** by placing a tick in the 'Select' column/s.

3. Enter a **Date**, **VAT Code**, **Percentage figure** and a **Description** for the Surcharge.

4. Select the **'Apply'** button to submit the Surcharge.

5. The surcharge transaction will be added to the Client's Account.



Monetary tab

This tab allows you to surcharge a Client's Account by a monetary value.

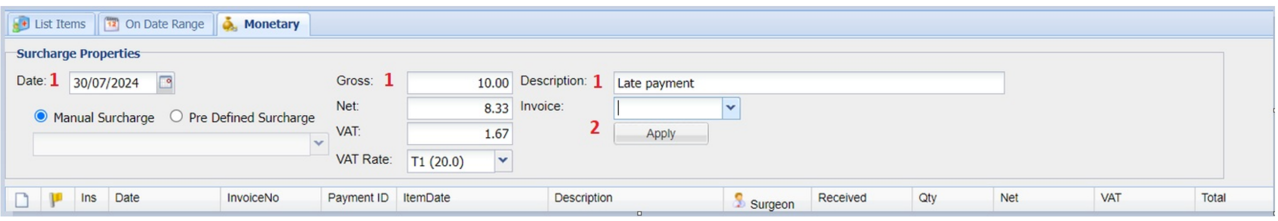
Surcharges can be applied by a manual value entered by the user or by a pre-defined value. Pre-defined surcharges can be configured by system administrators. Adding pre-defined surcharges is detailed in 'Accounts Libraries

Manual Surcharges

1. Enter a **Date**, **Description** and **Surcharge Amount**.

2. Select the **'Apply'** button.

3. The surcharge transaction will be added to the Clients Account.



Pre-defined Surcharges

1. Select the **'Pre-Defined Surcharge' option**.

2. **Select a pre-defined surcharge** from the drop-down list.

3. Enter a **Description** for the Surcharge and submit the Surcharge to the Clients account by selecting the **'Apply'** button.

4. The Surcharge transaction will be added to the Clients Account.