

Raw Material Surcharges

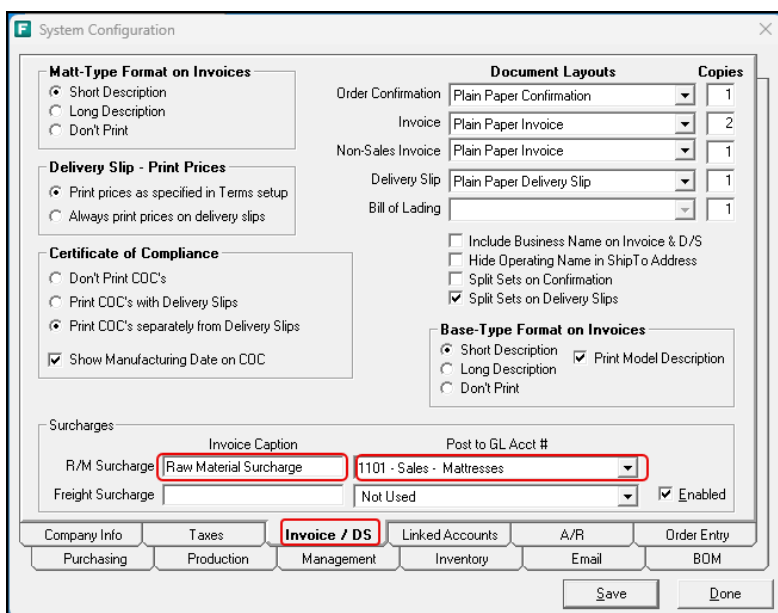
Introduction

Freedom's Raw Material Surcharges provide a way to add an automatic surcharge to invoices to compensate for temporary input cost increases. The surcharge is added automatically as an extra Line Item. The amount is calculated as a percentage of the price.

The percentage rate is set per Matt Type and Base Type, so you can tailor the surcharge rate/amount based on the specifics of each type of construction. Surcharges can be enabled or disabled per Customer in case you have VIP customers you want to exclude.

General Configuration

1. Go to **File->Configuration**, the **Invoice / DS** tab.
2. Enter a **GL Account** you want the RM Surcharges to post to, and what it should be called on the Invoice (**Invoice Caption**).
3. Click **Save** and **Done**.



System Configuration

Matt-Type Format on Invoices

- Short Description
- Long Description
- Don't Print

Delivery Slip - Print Prices

- Print prices as specified in Terms setup
- Always print prices on delivery slips

Certificate of Compliance

- Don't Print COC's
- Print COC's with Delivery Slips
- Print COC's separately from Delivery Slips
- Show Manufacturing Date on COC

Document Layouts

Document	Layout	Copies
Order Confirmation	Plain Paper Confirmation	1
Invoice	Plain Paper Invoice	2
Non-Sales Invoice	Plain Paper Invoice	1
Delivery Slip	Plain Paper Delivery Slip	1
Bill of Lading		1

Include Business Name on Invoice & D/S
 Hide Operating Name in ShipTo Address
 Split Sets on Confirmation
 Split Sets on Delivery Slips

Base-Type Format on Invoices

- Short Description
- Long Description
- Don't Print
- Print Model Description

Surcharges

Surcharge	Invoice Caption	Post to GL Acct #	Enabled
R/M Surcharge	Raw Material Surcharge	1101 - Sales - Mattresses	<input type="checkbox"/>
Freight Surcharge		Not Used	<input checked="" type="checkbox"/>

Company Info | Taxes | **Invoice / DS** | Linked Accounts | A/R | Order Entry
Purchasing | Production | Management | Inventory | Email | BOM

Save Done

Enter the RM Surcharge rate for each Matt and Base Type

1. Go to **Administrator->Product Development Setup->Mattress Types**.
2. Select an applicable Mattress Type and click the **Edit** button, (or just double-click the line) to open the Edit panel.
3. Enter the desired RM **Surcharge %** and click **Save**.
4. Repeat steps 2 and 3 for each applicable Mattress Type

The screenshot shows a software window titled "Types" containing a table of mattress types and an edit form. The table has columns for Short Name, Description, Invoice Desc, Surcharge %, SubType, Show on Report, Order Line Editor, and UOM. The "TPT" row is highlighted in orange. The edit form for "TPT" is open, showing fields for Short Name, Invoice Description, Description, SubType, Order Line Editor ID, and UOM. The "Surcharge (%)" field is highlighted with a red box.

Short Name	Description	Invoice Desc	Surcharge %	SubType	Show on Report	Order Line Editor	UOM
BBT	Border Box Top	Matt	10.0	TightTop	False	Default	Each
BET	Border Euro Top	Matt		TightTop	False	Default	Each
BPT	Border Pillow Top	Matt		TightTop	False	Default	Each
FET	Faux Euro Top	Matt		TightTop	False	Default	Each
FPT	Faux Pillow Top	Matt		Faux Pillow Top	True	Default	Each
TTM	Tight Top Mattress	Matt		TightTop	False	Default	Each
TBT	Traditional Box Top	Matt		PillowTop W/Inn	True	Default	Each
TET	Traditional Euro Top	Matt		PillowTop W/Inn	True	Default	Each
TPT	Traditional Pillow Top	Matt		PillowTop W/Inn	True	Default	Each

Short Name: TPT Invoice Description: Matt
Description: Traditional Pillow Top
SubType: PillowTop W/Inner Surcharge (%):
Order Line Editor ID: Default UOM: Each
 Include in Production Report
 Don't include in Production Report
Save Close

Print Print Surcharge List Default Sizes Add Edit Delete Done

Follow the same procedure for Bases via **Administrator->Product Development Setup->Base Types** menu item.

Enable RM Surcharges for Applicable Customers

While the RM Surcharge rates are defined for each Matt and Base type, you can also control which Customers are charged.

1. Go to **Accounts Receivable->Customers** and select a Customer.
2. Go to the **Account Info** tab.
3. Put a check in the **Allow Surcharges** check-box.
4. Click **Save**.
5. Repeat for each applicable Customer.

Albert's Fine Furniture - Albe-01

Acct No: Albe-01 Business Name: Albert's Fine Furniture

Terms: Net 30 Days Country: Country Document Group: Use Default

Disc %: 0 Credit Limit: \$6,000.00 - None -

Disable Finance Charges
 Disable Early-Payment discount message
 Hide Prices on Order Confirmation
 Don't print Statements for this Customer

Grace Amount / Days
Amt: \$2,000.00
Days: 5

Account Status
Active
 Confirm Each Order
 Don't Allow Orders to be Entered
 Never Hold Orders

Default Deposit Acct: 0101 - Cash in Bank
Default Price List: Standard-21
GS1 Company Prefix:
Accepts Backorders: Yes

T1 NY State: T2 County:
Tax Number: 451256-125 N/A
 Normally Pays Normally Pays

Effective Date: 08/23/2013
Coop Advertising: Eligible Allow Surcharge
Spiffs / PM's: Eligible Print Vouchers

Account Notes: Must always call for payment.
Dec 13, 2007: Payment In Mail

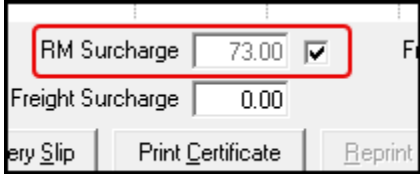
Bill To: **Account Info** Auto-Email Reference Info Ship To Locations

Delete Customer Authorized Products Customer SKU's & Info Save Done

Ongoing Usage

When you enter Orders for a Customer with RM Surges enabled:

- The Surcharge amount will be automatically calculated and shown in the RM Surcharge box (at the bottom of the screen).
- The check-box will be automatically checked. Un-checking it will override the Surcharges, setting them to zero.



A screenshot of a software interface showing two input fields. The first field is labeled 'RM Surcharge' and contains the value '73.00' followed by a checked checkbox. The second field is labeled 'Freight Surcharge' and contains the value '0.00'. Below these fields are three buttons: 'ery Slip', 'Print Certificate', and 'Reprint'.

- When the Order is Invoiced, an RM Surcharge line item will be automatically added to the Invoice. The Description will be the **Surcharge Caption** text entered in File->Configuration.

DESCRIPTION	PRICE	EXT
Matt Diamond - Grp A	730.00	730.00
Ecu White		
Raw Material Surcharge		73.00

- The RM Surcharge amount will post to the **GL Account** selected in File->Configuration.