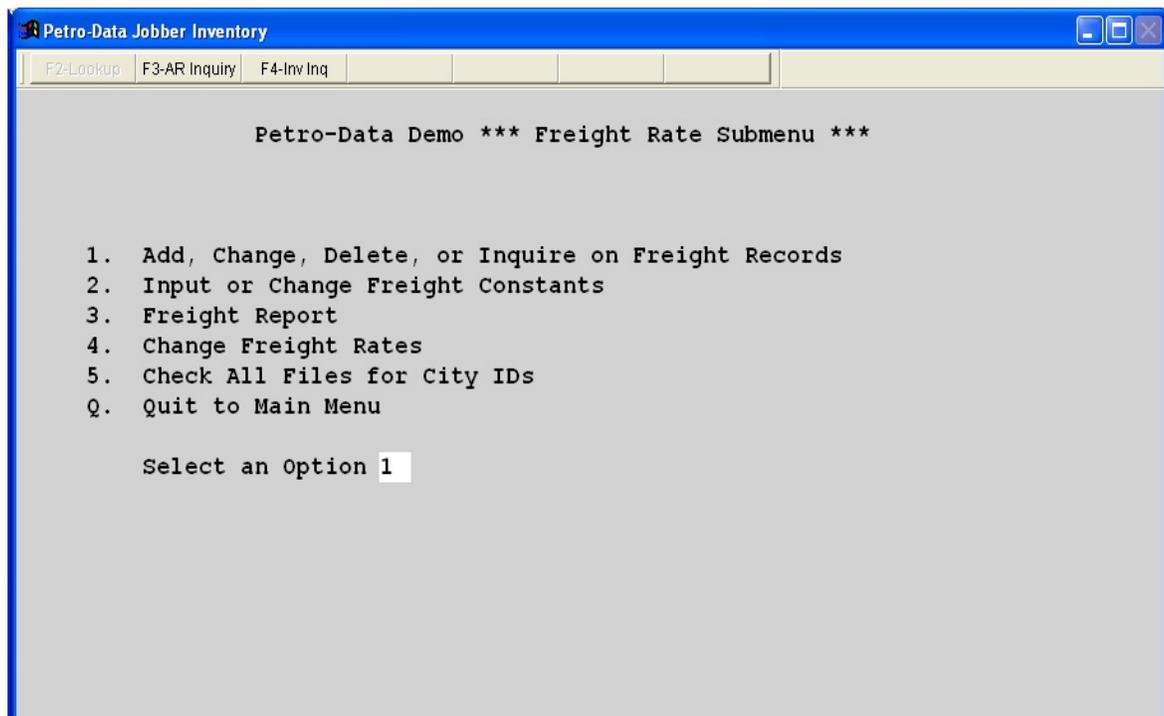


## FREIGHT RATE FILE MAINTENANCE

After the City Codes are entered, the freight rate records must be created for each origin to destination. You may enter freight rates for gasoline, diesel, kerosene and propane. For each fuel type, there is space for a different freight rate for transportation by Common Carrier, Transport or Bobtail. Freight Adjustment charges are not used in this record. The current percentage is entered in BOL or Sales Invoice entry.

### Master File Maintenance Menu Select:

From the Master File Maintenance Submenu, select *18 - Freight Rate File Maintenance*.



## 1 - ADD, CHANGE, DELETE, OR INQUIRE ON FREIGHT RECORDS

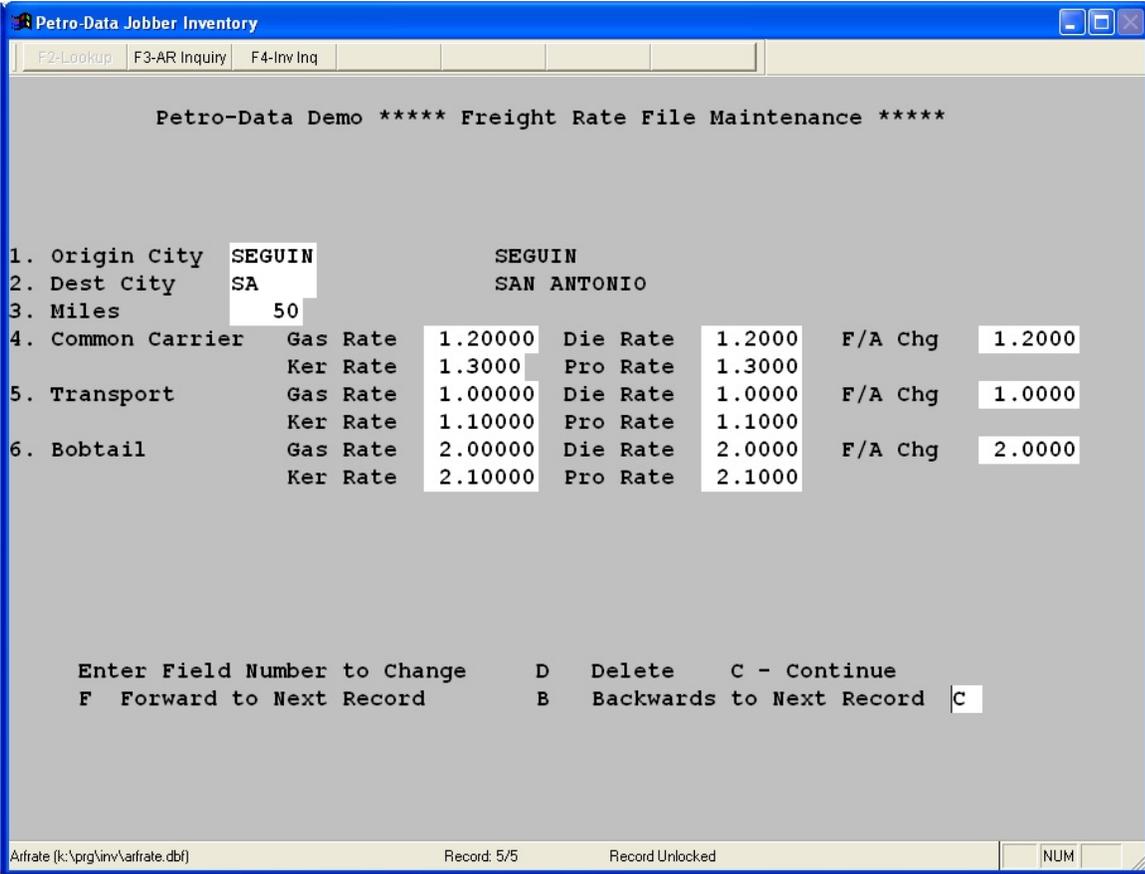
### Menu Select

From the *Freight Rate File Maintenance Submenu*, select *1 - Add, Change, Delete, Or Inquire On Freight Records*.

### 1. Origin City

Enter a City ID Code for the Original point of the freight rate calculation. ID

codes must be set up in City Code File Maintenance. If valid, the city description displays.



**2. Destination City**

Enter a City ID Code for the Destination point of the freight rate calculation. ID Codes must be set up in City Code File Maintenance to be valid in this record. If valid, the city description displays.

**3. Miles**

Enter the miles between origin and destination cities. This field is used if you are calculating freight by Miles Only. (Install switch in BOL Install.) Otherwise, this is reference information only.

**4. Common Carrier**

Rate and freight adjustment if applicable for Gas, Diesel, Kerosene and Propane. Enter as Cents per gallon (Example: one cent is entered 1.00 NOT .01).

**5. Transport**

Rate and freight adjustment if applicable for Gas, Diesel, Kerosene and Propane. Enter as Cents per gallon (Example: one cent is entered 1.00 NOT .01).

## 6. Bobtail deliveries.

Rate and freight adjustment if applicable for Gas, Diesel, Kerosene and Propane. Enter as Cents per gallon (Example: one cent is entered 1.00 NOT .01).

It is NOT necessary to enter rates for transport or bobtail deliveries if the company does not have any transport or bobtail trucks.

**Enter Rate/Gal & Fuel Adj. Charge For Common Carrier (EX: 1.2 is 1.2 Cents)**

*Note 1: Truck designation is stored in Truck File Maintenance. Code 'C' for Common Carriers, Code 'T' for Transports and Code 'B' for Bobtails. The truck entered on the BOL determines what freight rate is used.*

## ACD Prompts.

Enter Field # To Change - Enter the field number of the incorrect data and enter the correction. Field numbers 1 and 2 may not be changed.

Delete - Enter D to delete the Freight record.

*Are You Sure You Want to Delete this Record (Y/N).* Enter Y to delete the record or N to quit without deleting.

Continue. Enter C to quit this record and add or display another record.

Forward to Next Record. Enter F to page forward to the next record.

Backwards to Next Record. Enter B to page backward to the previous record.

Quit. Enter Q to quit this Freight Rate record.

## 2 - INPUT OR CHANGE FREIGHT CONSTANTS

Freight Constants play a role in several reports as well as some input programs. This information will be included in the definition of each field in the record.

*Note 2: If you are not calculating freight, the only fields that must be complete are the 4 tax types for diesel (Reports). And if you are in Texas, the tax types for diesel quotas (signed statement customers) and monthly gallons allowed.*

### Master File Maintenance Menu Select

From the *Freight Rate File Maintenance Submenu*, select 2 - *Input or Change Freight Constants*.

```
Petro-Data Demo ***** Input Freight Constants *****

Minimum gallons for gasoline 7500
Minimum gallons for diesel 7500
Input 4 taxtypes for diesel HSD LS2 LSD KER
Taxtypes for HSD quotas HSD Monthly Gallons Allowed 10000
Enter tax types for: Kerosene KER Propane PRO
Input insurance factor for common carrier (ex: .0407) 0.045500
Input freight surcharge (ex: .020 is 2 percent ) 0.020000
Input insurance factor for your transport 0.045500
Input insurance factor for bobtail deliveries 0.045500
Are city IDs used for customers actual city? (Y/N) N
Is everything OK? (Y/N/Q) N
```

### Minimum gallons for gasoline

The number of gallons (both gasoline and diesel - if a split load) required on a single purchase for the freight to be calculated by the gallon. In some versions, you may have a flat charge automatically added to an invoice with less than this number of gallons. In other versions, no freight is calculated.

### Minimum gallons for diesel

Same as gasoline.

*Note 3: Split loads create a problem with the minimum gallons if the flat rate for diesel and gasoline are different. In the standard program, the diesel gallons are prorated using the diesel flat rate and the gasoline rate is used for the balance.*

#### **Input 4 tax types for diesel**

TAX types are in Tax Code File Maintenance (field 4) and in field 23 of the inventory record for diesel fuel items (this includes clear and dyed). This feature is used in several reports to separate the diesel products from the gasoline.

#### **Tax types for HSD quotas**

TEXAS requirements for state tax on signed statement customers - Dyed diesel and sometimes clear diesel. Enter the Tax Types for the diesel products that are limited by the state of Texas. This field along with the 'Registered' switch in the customer file set to Y will trigger a message in Invoice entry when a customer goes over the monthly gallons allowed as defined in the next field. The gallons purchased are stored in a field in the customer file and is cleared during month end processing. According to the State of Texas, you may sell the gallons tax exempt on the invoice that puts them over the allowed gallons, but next invoice will have to be taxed.

#### **Monthly Gallons Allowed**

TEXAS requirements for state tax - Enter the maximum number of gallons allowed to be sold tax exempt per month to signed statement customers.

\*\*\* If your business is not in the state of Texas or if you do not sell to signed statement customers, you may leave the previous two fields blank.\*\*\*

#### **Input insurance factor for common carrier**

If you are calculating freight and an insurance factor is included on freight invoices, enter the per gallon rate. Example: .0407 would be 4+ cents per gallon.

#### **Input freight surcharge**

If you are calculating freight and a surcharge is included on freight invoices, enter the per gallon rate. Example: .020 would be 2 cents per gallon.

#### **Input insurance factor for your transport**

If you are calculating freight and want to include an insurance factor for your transport deliveries, enter the per gallon rate in the same format as the previous two fields.

#### **Input insurance factor for bobtail deliveries**

If you are calculating freight and want to include an insurance factor for bobtail deliveries, enter the per gallon rate in the same format as the previous fields.

#### **Are city IDs used for customers actual city? (Y/N)**

If you are calculating freight by origin to destination cities or miles, you may use one city ID to include several cities. In this case, this field needs to be N. This will allow you to type the actual city name in the customer file. If Y - the city description in the City Code record will display in the customer record.

*Note 4: This is a highly specialized feature and should be tested to make sure customer file maintenance is acknowledging it. Enter a customer with the city code. Exit the record and call it back up. Edit the record, make sure you edit through the city field.*

*The city description should not CHANGE.*

**Is everything OK?**

Enter N to make corrections, Y to accept changes and Quit, or Q to quit without accepting any changes (any changes you made will be discarded).

### 3 - FREIGHT REPORT

This report lists all of the freight records.

Menu Select:

From the Master File Maintenance Submenu, select *18 - Freight Rate File Maintenance*.

From the Freight Rate File Maintenance submenu, select *3 - Freight Report*.

#### **BEGIN INPUT - Freight Report Options**

Printer.

Enter S to print the report on the screen.

Enter P to print to the printer and select the desired printer.

Enter F to print to a Text File and enter the full path and desired file name.

Enter Q to return to the menu without printing.

Enter the Date.

The current system date displays. Press *enter* to accept the default or enter a date for the report. This date has no effect on the report.

Input selection criteria?

To narrow the report down, choose from a number of possible criteria. For example, origin city = CAS would list all records with origin city = CAS.

Is Everything Ok? (Y/N/P=Printer/Q=Quit).

To print the report using the selected printer or screen, press Y. To change to a different printer or print option, press P. To quit without printing enter N or Q.

*Sample Fright Rate Report*

## 4 - CHANGE FREIGHT RATES

Make sweeping Freight Rates changes based on certain criteria. Prepost and update them when you are ready to make the changes.

Master File Maintenance Menu Select

From the *Freight Rate File Maintenance Submenu*, select 4 - *Change Freight Rates*. The following menu displays:

```
Demo Company *** Freight Rate Change Submenu ***

1.  Input Freight Changes
2.  Print Freight Changes
3.  Post Freight Changes
4.  Clear all Rate Changes and Start Over
Q.  Quit to Main Menu

Select an Option |Q
```

- 1 - INPUT FREIGHT CHANGES
- 2 - PRINT FREIGHT CHANGES
- 3 - POST FREIGHT CHANGES
- 4 - CLEAR ALL RATE CHANGES AND START OVER

## 5 - CHECK ALL FILES FOR CITY IDs

**These are your options:**

Y=Start phase I - begin looking for blank city ids and assigning codes.

Q=Quit - quit without checking or changing anything.

S=Skip phase I and go to phase II - this option allows you to enter the ids when a blank one is found.

When Phase I is complete '*Ready to begin Phase II*' displays.

As the program finds a record with a blank city id, it displays the customer number and the city description. You have the following options:

Enter a city ID - enter a valid city id from City File.

F2=Lookup - Press <F2> to display valid city id codes from City File.

A=Add a city - Enter A if the city code has not been set up, you may enter it here. The new record will be added to the City File.

Blank to skip - you may leave the city code blank for the displayed customer and move on to the next record.

Q=Quit - Enter Q to quit phase II at this point and return to the menu. Any city id codes entered to this point will remain.

```

                                Demo Company ***** Check City IDs *****

This program has two phases:

First, we look for all blank cityids and try to assign a cityid.

Then, we look again and let you input the cityids that are still missing.

Ready to begin phase I? 

Y=Start phase I   Q=Quit   S=Skip phase I and to to phase II
```