
8. Rating an order

Although charges for an order are not finalized until the order is invoiced, you can pre-rate an order during the order entry process. To rate an order, you can:

- Specify the line haul charge.
- Record accessorial charges.

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Understanding the rating process

Some companies base rating decisions entirely on pre-existing, negotiated contracts. Other companies negotiate rates with customers as orders are entered. Still other companies employ the first rating method with some customers and the second rating method with other customers.

To pre-rate an order, you must understand the rating options that TMWSuite offers:

- **Automatic calculation of line haul and/or accessorial charges**
When you use the **Compute** command to have the system calculate charges, it searches through billing rates you set up in the Rate Schedules application. If it finds appropriate match(es), it applies charges based on the rate(s) found.
- **Manual entry of line haul and/or accessorial charges**
You can record charges manually if:
 - You do not have a pre-existing, negotiated contract with a customer.
or
 - You have a pre-existing contract, but you choose to override it with rates negotiated *on the fly* for a specific order.

In some cases, an order entry representative will use both rating options for the same order. For example, he/she can use the **Compute** command to have the system automatically assign the line haul charge and some accessorial charges. In addition, he/she can manually add other accessories to the order.

Orders can be pre-rated in Order Entry and in Dispatch. The rates assigned in either of those applications can be retained or changed when invoices for orders are created in the Invoicing application.

What is a charge type?

Charge types must be defined before you can rate an order either manually or automatically. A charge type is an item for which a customer may be billed. It identifies the unit of measure used to calculate the charge. For example, if you charge by the mile, the rate is mileage-based. If you charge according to weight, the rate is weight-based.

Charge types are categorized as primary or secondary. A primary charge type is used for a line haul charge, i.e., the base amount the customer is to pay for the transportation of a load. A secondary charge type is used for any accessorial charge that is billed separately from the line haul cost.

Some charge types are a standard part of TMWSuite and come pre-loaded with the system. These are called system codes. Charge types that are system codes for line haul charges are listed here:

Charge Type	Use
Freight (Distance)	Line haul rates based on cents per mile for all miles traveled between billable stops.

Charge Type	Use
Freight (Dist O-D)	Line haul rates based on cents per mile for miles between origin and destination. Note: Miles traveled for interim stops are not considered.
Freight (Weight)	Line haul rates based on cents per hundred weight.
Freight (Flat)	Line haul rates based on flat dollar amounts.
Freight (Count)	Line haul rates based on cents per piece, i.e., boxes, bushels, etc.
Freight (Volume)	Line haul rates based on cents per gallon.
Freight (Time)	Line haul rates based on dollars per hour.
Freight (Default)	Not to be used on any rates; used as the system default for the line haul charge type on an order that has not yet been rated

Most accessorial charge types do not come preloaded in the system, i.e., few system codes exist for accessorial charge types. For the most part, your company must create its own accessorial charge types. Commonly used accessories are listed here:

- Stop Charge
- Cleaning
- Hand Loading
- Hand Unloading
- Fuel Surcharge

Note: Charge types are set up in the Enter/Edit Charge Types window. You can access this window in the Rate Schedules application or in the Invoicing application.

Types of billing rates

Before you can use the **Compute** command to have the system rate a load automatically, billing rates must be set up in the Rate Schedules application. There are four types of rates:

- **Primary rates**
Primary rates are used for line haul (freight) charges
- **Secondary rates**
Secondary rates are used for accessorial charges that can be predicted. Secondary rates must be linked to a primary rate. When a primary rate is applied to an order, the system checks to see whether any attached secondary rates match the order. If they do, the secondary rates are applied.

- **Line item rates**

Line item rates are used for accessorial charges that are applied on an *as needed* basis. In other words, line item rates represent accessorial charges that cannot be predicted in advance, such as detention time. Unlike secondary rates, line item rates are not linked to primary rates. Line item rates are applied only when an accessorial charge is manually added to an order.

- **Linked line item rates**

A linked line item rate can be thought of as a hybrid between secondary and line item rates because it has properties of both:

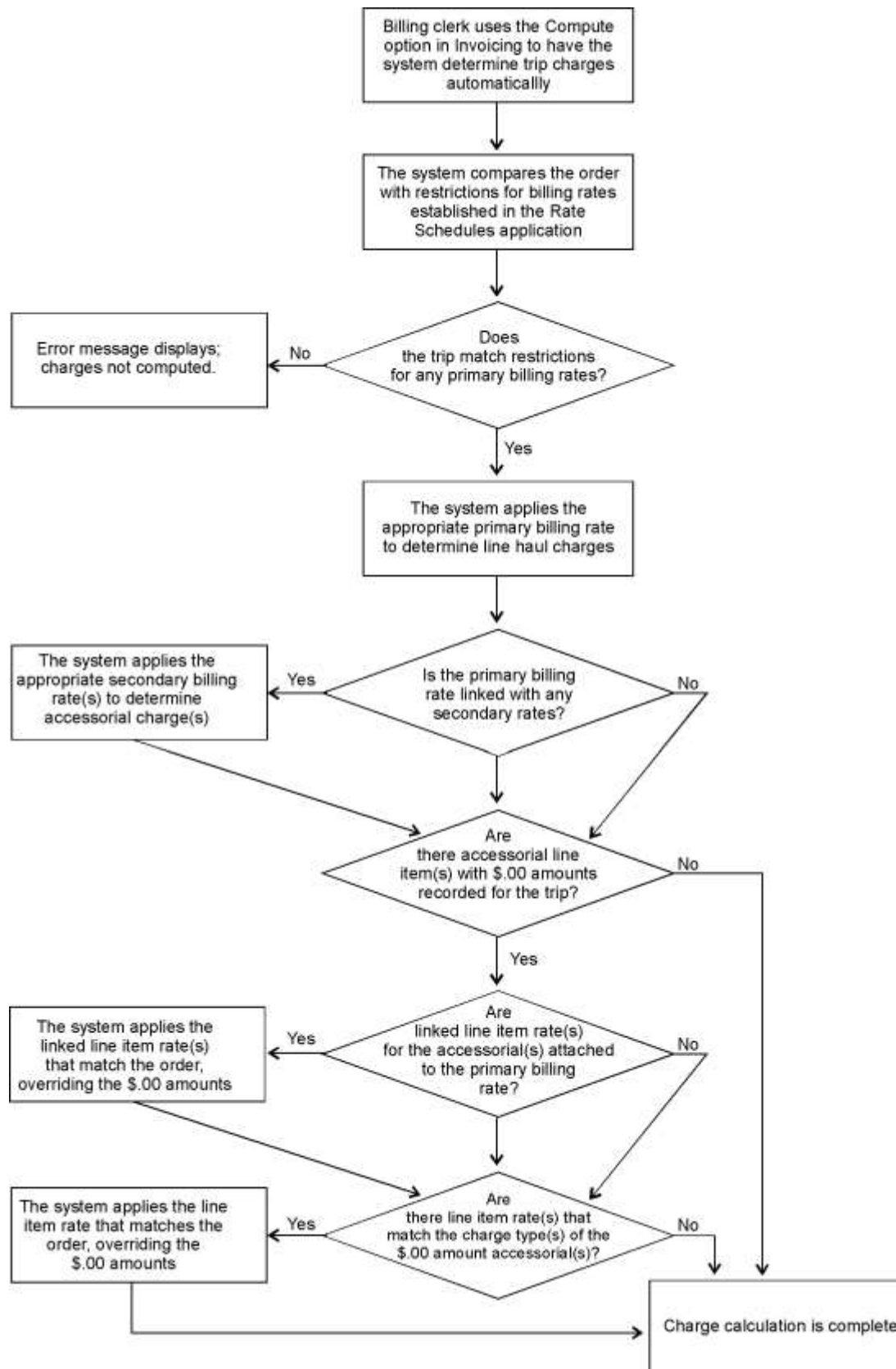
- Like a secondary rate, it must be linked to a primary rate.
- Like a line item rate, it is applied only when an invoice detail (line item) with a \$.00 amount is manually added to an order.

How billing rates are applied

Once rates are created in the Rate Schedules application, they can be applied using the **Compute** command in Order Entry, Dispatch, or Invoicing. The system follows this sequence of events when determining which rates to use when calculating the charges for an order:

1. It searches through the primary (line haul) rates you have recorded, checking the order against the conditions you have specified for each rate. These conditions are the restriction criteria the system uses to determine when the rate should be applied. When it finds a primary rate that matches the order, it assigns the applicable line haul charge based on that rate.
2. If secondary (accessorial) rates have been linked to the primary rate, the system compares each linked secondary rate to the order. If the order matches the restriction criteria set up for a secondary rate, the charge for that rate is applied.
3. There may be times when a particular accessorial (non-line haul) invoice detail must be added because an unforeseen situation warrants it. For example, detention time often cannot be predicted; therefore, detention charges are applied on an *as needed* basis. Such situational charges are manually added to an order in Order Entry, Dispatch, or Invoicing. If an accessorial line item is added manually and left with a zero dollar amount (\$.00), the system will do the following:
 - a. First it will check for any linked line item rates attached to the primary rate. If it finds one that has the same charge type as that used for the accessorial, it applies the linked line item rate, assuming the order matches the rate restrictions. The system replaces the zero dollar figure with the appropriate charge amount.
 - b. If no applicable linked line item rates are found, the system attempts to match the accessorial with standard line item rates, i.e., those that are not linked to primary rates. If it finds one that has the same charge type as that used for the accessorial, it applies the line item rate (assuming the order matches the rate restrictions). The system replaces the zero dollar figure with the appropriate charge amount.

The diagram below provides an overview of the how the system calculates charges for an order.



Determining an order's line haul charge

The rating method you use, i.e., Rate by Total or Rate by Detail, determines the steps you must follow to apply the line haul charge to an order.

Rating an order in Rate by Total mode

When you use Rate by Total mode, the rate is based on a sum total, such as weight or mileage, for all stops. Individual freight details cannot be rated separately, so the charge for an order is not determined by individual freight details.

Entering the line haul charge manually

When you use Rate by Total mode, you must record the appropriate rating-related entries in the order header. Applicable fields are shown here:

Commodity:	Actual Qty	Actual Unit	Charge Item	Chrg Qty	Fix	Rate Unit:	Rate	Linehaul Chrg	Fix	Fix Chrgs	Rate LH All	Pay Revenue	Fix \$
UNKNOWN/UNKNOWN	0	UNK	UNKNOWN	0	Not Fixed	UNKNOWN	0.00	\$0.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>

When you record a line haul amount manually, these fields are always used:

- **Charge Item** (Charge Type)
- **Chrg Qty**
- **Rate Unit** (display only)
- **Rate**
- **Linehaul Chrg** (display only)

These fields are used if the occasion warrants it:

- **Actual Qty** and **Actual Unit**
- **Fix** (located to the right of the **Chrg Qty** field)
- **Fix** check box
- **Fix Chrgs LH** and **All** check boxes

Basic steps

1. In the Order Entry Folder, create/look up the order to be rated.
2. If the order will be rated based on weight, volume, or count, enter the appropriate quantity in the **Actual Qty** and **Actual Unit** fields in the order header.

Notes:

1. The system automatically copies the entry recorded in the **Actual Qty** field to the **Chrg Qty** field.
2. If the order will be rated based on miles, there is no need to enter the mileage amount in the **Actual Qty** and **Actual Unit** fields. The system determines the mileage amount for you.

- Click in the **Charge Item** field. Select the desired charge type from the drop-down list. The system fills in the **Rate Unit** field based on the charge type you select.

Commodity:	Actual Qty	Actual Unit	Charge Item	Chrg Qty	Fix	Rate Unit:	Rate	Fix Rate	Linehaul Chrg	Fix Chrgs	LH All	Stm
UNKNOW	UNKNOW		Freight (Flat)	1	Not Fixed	Flat	\$50.0000		\$350.00			0

Charge Item selection determines the **Rate Unit**

- The **Chrg Qty** field identifies the number of units by which the rate is to be calculated. The entry in this field reflects the entry made in the **Actual Qty** field.

Leave the quantity as is.

Note: If you chose *Freight (Distance)* or *Freight (O-D)* in the **Charge Item** field, the system automatically fills in the **Chrg Qty** with the mileage amount.

- In the **Rate** field, enter the per unit dollar amount.

Note: As you tab from the **Rate** field, the system calculates the line haul charge and displays the total in the **Linehaul Chrg** field. The line haul charge is also shown in the top right corner of the order header.

LHaul \$350.00 + Acc \$0.00 = \$350.00	
Latest	Contact: Charlotte Webb
/19/ 08:00	Not Rated
/19/ 12:33	Rating Qty 1. FLT
Unit:	Rate
	350.0000
Fix Rate	Linehaul Chrg
	\$350.00
Fix Chrgs	LH All

Line haul charge

- Click the **Save**  icon in the sheet toolbar.

Locking in rating information entered for an order

You may occasionally want to protect rating information from being changed by other users who access the order in other applications. The following sections describe the various ways you can protect the rating information you entered from changes.

Fixing a charge quantity so that is not overwritten by the actual quantity

There may be times when you want to assign a charge quantity that is different than the quantity that the system determines is the correct amount. This need commonly occurs with orders that are rated based on miles. Additionally, you may need to do this with orders based on weight, volume, or count.

For example, the system determines actual miles based on the mileage amount returned by your mileage interface. However, for a specific order, you may want to rate an order based on a fixed mileage amount that you and your customer have negotiated. This fixed amount may affect billing and (if the driver is paid by the mile) settlement of the order.

The **Fix** field in the order header lets you specify that the charge quantity entered in Order Entry should not be automatically reset to the actual quantity in the Invoicing and (if applicable) Settlements applications.

This allows you to charge the customer, or pay the resource, for a quantity other than the actual amount.

Commodity	Actual Qty	Actual Unit	Charge Item	Chrg Qty	Fix	Rate Unit	Rate	Linehaul Chrg	Fix	Fix Chrgs	Rate LH All	Pay Revenue	Fix \$
UNKNOWN	UNKNOWN	0	UNK	UNKNOWN	0	UNKNOWN	0.00	\$0.00					

The **Fix** field provides these options:

- *Not Fixed*
The quantity is not fixed. As a result, the actual quantity recorded for the trip will be used (the default).
- *Inv Only*
The quantity is fixed and should be retained when the order is invoiced.
- *Inv & Stl*
The quantity is fixed and should be retained both when the order is invoiced and when the resource is paid for the trip.
Note: This option is applicable when both the billing rate and the pay rate have the same basis. For example, both rates are based on weight, or on volume, or on miles, and so on.

For instance, suppose the actual distance for an order is 61 miles, but you negotiate a billing rate based on a mileage amount of 75. To fix the billing quantity, you must do the following in the order header:

1. Select *Freight (Distance)* in the **Charge Item** field.
2. Enter **75** in the **Charge Qty** field.
3. Select *Inv Only* from the drop-down list in the **Fix** field.

This prevents the system from resetting the charge quantity to 61. The quantity of 75 is retained even if an applicable mileage-based rate has been set up in the Rate Schedules application and you use the **Compute** command to have the system apply the rate. If you leave the *Not Fixed* option selected, when the **Compute** command is used the quantity will be reset to the actual distance for the distance-based rate. The same would hold true for weight, volume, or count.

Note: If you use the *Inv & Stl* option to ensure that a fixed mileage will be used when the resource is paid, be aware of the following:

- The fixed quantity will be applied for loaded miles only.
- When mileage-based rates are applied, the system normally creates a pay detail for each individual leg; the pay detail indicates the miles traveled for the leg as well as the applicable per-mile amount. When the *Inv & Stl* option is used, individual loaded legs will not be listed. Instead, a single pay detail will be created for all loaded miles. The pay detail will list the fixed quantity you specified in the order header.
- If empty miles exist for the trip, the system will compute pay for empty legs as it always does. (For this reason, the *Inv & Stl* option works best for trips that do not involve empty legs.)

The `DefaultFixQty` setting in the `[Order]` section of the `TTS50.ini` file lets you specify the option that will serve as the default for the **Fix** field:

[Order]
DefaultFixedQty

Applies to	TMWSuite
Description	This setting specifies which option will be set as the default in the Fix Quantity field drop-down list in the order header.
Options	<ul style="list-style-type: none"> • 0 (default) Use <i>Not Fixed</i> as the default. Note: When this option is used, the text displayed in the Fix Quantity field in the Order Entry application is <i>Not Fixed</i>; the text displayed in the Fix Quantity field in the Dispatch Trip Folder is <i>None</i>. • 1 Use <i>Inv Only</i> as the default. • 2 Use <i>Inv & Stl</i> as the default.

Freezing the rate per unit

You can freeze the rate (the per unit dollar amount) when you pre-rate an order. You use the **Fix** check box to tell the system that the per unit dollar amount is to remain the same. You can freeze the rate on orders that are prerated manually, or on those that were pre-rated using the **Compute** command. When the order is invoiced, the rate remains the same.

Commodity:	Actual Qty	Actual Unit	Charge Item	Chrg Qty	Fix	Rate Unit:	Rate	Fix Rate	Linehaul Chrg	Fix Chrgs
UNKNOWN UNKNOWN			Freight (Distance)	251	Not Fixed	\$/Mile	1.7500	<input checked="" type="checkbox"/>	\$439.25	<input type="checkbox"/> <input type="checkbox"/>

In the Invoicing application, you can override the Fix Rate setting on a prerated order by clearing the check box.

Edit Invoice Folder (1)

Order # 2666 Invoice 1 of 1 Rate Mode: Rate by Total

Inv.# Linehaul Order: 2666 Status: On Hold Move#: 3284 Apply To:

Ship: CARCLE
CARRIE'S CURIOSITIES
21751 Fuller Ave.
CLEVELAND,OH/CUY 44123
Ship Date: 08/19/ 08:00

Cons: CYNCIN
CYNTHIA'S CUBBY HOLE
6644 Wheeler Ave.
CINCINNATI,OH/ 45205
Delivery Date: 08/19/ 12:33

Bill To: CARCLE 123456
CARRIE'S CURIOSITIES
21751 Fuller Ave.
CLEVELAND,OH/CUY 44123
Different Mail To address exists
Bill Date: 08/18/ 11:25

RevType1 Cincinnati Ref Reference # Wgt Tare: Gross: Ctag Charlotte Webb

Cur. \$ U.S. Ppd/Col Net 60 O/D Miles 251 Tractor UNKNOWN Trailer UNKNOWN

Remarks Rate: UNKNOWN

RevType2 Bakersfield RevType3 A RevType4 D Driver UNKNOWN StopOffs 0 Fixed Chrg

Charge / Commodity Code	Cmp ID	Count	Volume	Weight	Distance	Quantity	FixQty	Rate	Fix	Charge	Fix
Delivery	CYNCIN	CINCINNATI,OH/			251	251					
UNKNOW	UNKNOW				251	251					
Ref#: BL#		Pieces	Cubes	Pounds	Miles	Miles					
Freight (Distance)					251			1.75		\$439.25	
Freight Total					Miles			\$/Mile			

If you use the Orders Ready to Prepare queue to process prerated orders, the system will not re-rate an order with a fixed rate. For such an order, the Batch Error Log displays a "Charge fixed in OE" message for orders that have the **Fix** check box selected. The fixed rate is retained when the invoice is saved.

Batch/Error Log

I	Title	Message	Date
1	Order 2637, BillToCARCLE, BookdByC	Completed processing order: 2637. (1 of 3) at 09:54:51 Tariff 532. Total \$258.75	08/19/20
1	Order 2638, BillToCARCLE, BookdByC	Completed processing order: 2638. (2 of 3) at 09:54:52 Tariff 532. Total \$470.63	08/19/20
1	Order 2666, BillToCARCLE, BookdByC	Completed processing order: 2666. (3 of 3) at 09:54:52 Tariff 0. Total \$439.25 Charge fixed in OE	08/19/20
1	Process All	Process All function completed on 8/19/2003. 3 of 3 processed in 0 minutes. Created 3 invoices. Total billed \$1,168.63	08/19/20

Print Save As Delete Critical Only Close

Note: The Batch Error Log also shows this message for orders that have the **Fix Chrgs LH** or **ALL** check boxes selected

Freezing line haul only, or all charges, on prerated orders

The order header contains separate check boxes for freezing line haul and all charges.

Order Entry Folder (1)

Order #

Order ID: NEW LHaul \$0.00 + Acc \$0.00 = \$0.00

Order By: UNKNOC UNKNOWN Ref: Reference # Earliest Latest Contact:

Shipper: UNKNOWN UNKNOWN UNKNOWN Pickup: 08/06/ 08:00 08/07/ 08:00 Not Rated

Consignee: UNKNOWN UNKNOWN UNKNOWN Drop: 01/01/ 00:00 12/31/ 23:59 **Rating Qty 0 UNK**

Commodity:	Actual Qty	Actual Unit	Charge Item	Chrg Qty	Fix	Rate Unit:	Rate	Fix Rate Linehaul Chrg	Fix Chrgs LH All
UNKNOWN UNKNOWN		UNK	UNKNOWN	0	Not Fixed	UNKNOWN	0	\$0.00	<input type="checkbox"/> <input type="checkbox"/>

Fix Chrgs check boxes in Order Entry

Order Header Information

Order ID: NEW1 LH \$0.00 + Acc \$0.00 = \$0.00

Order By: UNKNOWN Placed: 08/07/2003 01: Order Available: 08/07/20 01:

Bill To: UNKNOWN Bk'd By: CFD Booked: 08/07/20 01:

Contact: Order Status: Available Invoice Status: Pending

Tariff: Rating Qty/Unit:

Commodity:	Rate By	Total	Charge Item	Charge Qty	Unit	Fix	Rate Unit	Rate	Rate Linehaul Charge	Fix Chrgs LH All	mnt Qty	Stmnt Unit	Fix
UNKNOWN UNKNOWN			Freight (Flat) (FLT)	0	FLT	None	Flat	0	\$0.00	<input type="checkbox"/> <input type="checkbox"/>	0		<input type="checkbox"/>

Fix Chrgs check boxes in Trip Folder

Freezing only the line haul charges

Selecting the **LH** check box forces the system to retain the line haul charges on a prerated order during the invoicing process. The order can be re-rated using the Invoices Ready to Prepare queue or the **Compute** command in the Edit Invoice Folder. However, only the accessorial charges will be re-rated.

This illustration shows how a prerated order that has its line haul charge fixed is displayed in the Edit Invoice Folder. The invoice header shows the **FixChrg LH** check box selected.

Edit Invoice Folder (1)

Order # 2387 Invoice 1 of 1 Rate Mode: Rate by Total

Inv. #: Linehaul Order: 2387 Status: On Hold Move#: 2942 Apply To:

Ship: BAKBAK Cons: CYN CIN Bill To: BAKBAK Bill To's: ALTID
 BAKER'S RARITIES CYNTHIA'S CUBBY HOLE BAKER'S RARITIES
 88 Relic Rd. 6644 Wheeler Ave. 88 Relic Rd.
 BAKERSFIELD, CA/ 99386 CINCINNATI, OH/ 45205 BAKERSFIELD, CA/ 99386

Ship Date: 08/08/20 08:00:0 Delivery Date: 08/11/20 08:03:0 Bill Date: 08/07/20 12:00

RevType1 UNKNOWN Ref Reference # Wgt Tare: Gross: Clac Jamie Baker

Curr. \$ U.S. Ppd/Col Net 30 O/D Miles 2203 Tractor UNKNOWN Trailer UNKNOWN

Remarks Rate: 530 DIST LOADED

RevType2 100 RevType3 UNKNOWN RevType4 UNKNOWN Driver UNKNOWN StopOffs 0 **FixChrg: LH All**

Charge / Commodity Code	Cmp ID	Count	Volume	Weight	Distance	Quantity	FixQty	Rate	Fix	Charge	Fix\$
Delivery	CYN CIN	CINCINNATI, OH/									
FURN	FURNITURE/ANTIQUES	10			2,203	2,203					
Ref#: BL#		Pieces	Cubes	Pounds	Miles	Miles					
Freight (Distance)											
Freight Total						2,203		1.85		\$4,075.55	<input checked="" type="checkbox"/>
						Miles		\$/Mile 530 / DIST LOADED			
FurnitureWrapping	UNKNOWN								<input checked="" type="checkbox"/>	PST <input checked="" type="checkbox"/> GST <input checked="" type="checkbox"/>	
UNKNOWN UNKNOWN						10		15.00		\$150.00	<input type="checkbox"/>
UNK						Pieces		\$/Piece 455			

Note the invoice detail line for the line haul charge. Its **Quantity** and **Rate** fields cannot be edited. Its **Fix\$** check box is selected.

Even if your TTS50 file contains the `OverridePreRatingInQueueProcessing=Yes` setting in the [Invoice] section, a check mark in the **Fix Chrgs LH** check box overrides the setting. The check mark prevents re-rating of the line haul in the Orders Ready to Prepare queue. If you need to rerate the line haul charges, you must clear the **LH** check boxes.

Note: Whether you clear the check box in the invoice header or the detail line, the system also clears the other check box.

Freezing all charges

Selecting the **All** check box forces the system to retain the line haul *and* accessorial charges on a prerated order during the invoicing process.

Notes:

1. When the **All** check box is selected, the system automatically selects the **LH** check box as well.



2. When the **All** check box is selected, the **Fix** check box for each accessorial in the Accessorials and Secondary Charges window is also selected.



3. The **Fix** check box in the Accessorial and Secondary Charges window will not override the selection of the **All** check box in the order header. Also, if the **All** check box is not selected, you cannot independently freeze an accessorial charge using its **Fix** check box.

The order cannot be re-rated using the Invoices Ready to Prepare queue or the **Compute** command in the Edit Invoice Folder.

Note: If you attempt to use the **Compute** command when the **Fix Chrgs All** check box has a check mark, the system displays a message indicating that you cannot compute charges on an order for which the charges are fixed. This means that no rates – including accessorial rates – will be applied.

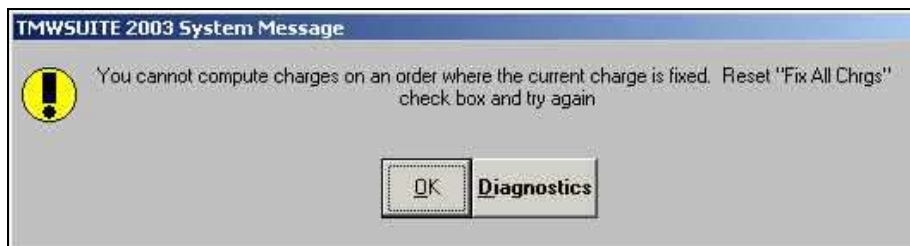
This illustration shows how a prerated order that has all charges fixed is displayed in the Edit Invoice Folder. The invoice header shows both the **FixChrg LH** and **All** check boxes selected.

The screenshot shows the 'Edit Invoice Folder (1)' window. At the top, the Order # is 2386. The invoice is 1 of 1, with a Rate Mode of 'Rate by Total'. The status is 'On Hold' and the Move # is 2941. The shipper is BAKBAK and the consignee is CYNTHIA'S CUBBY HOLE. The bill to is BAKBAK. The ship date is 08/08/20 and the delivery date is 08/11/20. The bill date is 08/07/20. The driver is Jamie Baker. The rate is 530. The 'FixChrg: LH' and 'All' checkboxes are selected and circled in the header area.

Charge / Commodity Code	Cmp ID	Count	Volume	Weight	Distance	Quantity	FixQty	Rate	Fix	Charge	Fix\$
Delivery	CYN CIN	CINCINNATI, OH/									
FURN	FURNITURE/ANTIQUES	10			2,203	2,203					
Ref#:	BL#	Pieces	Cubes	Pounds	Miles	Miles					
Freight (Distance)											
Freight Total						2,203		1.85		\$4,075.55	<input checked="" type="checkbox"/>
						Miles		\$/Mile 530 / DIST LOADED			
FurnitureWrapping	UNKNOWN								<input checked="" type="checkbox"/>	PST	<input checked="" type="checkbox"/>
UNKNOWN	UNKNOWN					10		15.00		\$150.00	<input checked="" type="checkbox"/>
UNK						Pieces		\$/Piece 455			

Note the detail lines for both the line haul charge and the accessorial charge. Each line has its **Quantity** and **Rate** fields as display only. Each line has its **Fix\$** check box selected.

When the **Compute** command is used to rerate the order, the system displays this message:




If you rate orders using the Orders Ready to Prepare queue, even if you have the `OverridePreRatingInQueueProcessing=Yes` setting in the [Invoice] section of your TTS50.ini file, a check mark in the **Fix All** check box overrides the setting.

If you need to re-rate the order after all, you must clear the check mark from the **Fix All** check box. Once the check mark is removed, the order can be re-rated using the **Compute** command or by processing in the order in the Orders Ready to Prepare queue in the Edit Invoice Folder.

Letting the system automatically rate an order

If your company has set up billing rates in the Rate Schedules application, you can have the system search through those rates to find one that applies for an order. There are three ways to initiate the automatic rating of an order:

- Click the **Compute**  icon in the sheet toolbar
- Select **Edit > Compute Charge**.
- Use the shortcut keys, CTRL+G.

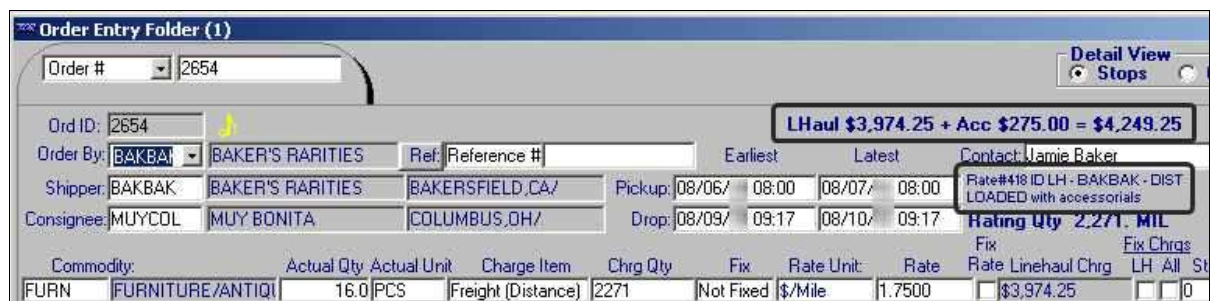
Note: When you compute the rate for an order, the system will update the **Charge Qty** with the actual quantity, if they are not the same. If you want the **Charge Qty** to be retained when the order is invoiced, select the *Inv only* option from the **Fix** drop-down list. If you want to retain the quantity when the order is invoiced and when it goes through the settlement process, select the *Inv & Stl* option from the **Fix** drop-down list. Leaving the **Fix** field as *Not Fixed* allows the system to override the **Charge Qty** in the Invoicing and Settlements applications.

How the system applies primary rates in Rate by Total mode

The system compares the conditions of the order with all billing rates on file. Three scenarios can result from this comparison.

1. An appropriate rate is found and applied.

If an applicable primary rate is found, it is used to calculate the line haul charge. If secondary rates are attached to the primary rate, those charges are included in the calculation. The line haul amount is shown in the **Linehaul Chrg** field. The notation at the top right of the order header shows the totals for line haul and accessorial charges.



The screenshot shows the 'Order Entry Folder (1)' window for Order # 2654. The order details include: Ord ID: 2654, Order By: BAKBAK (BAKER'S RARITIES), Shipper: BAKBAK (BAKER'S RARITIES), Consignee: MUYCOL (MUY BONITA), and pickup/drop dates from 08/06 to 08/10. A summary box at the top right displays 'LHaul \$3,974.25 + Acc \$275.00 = \$4,249.25'. A note indicates 'Rate#118 ID LH - BAKBAK - DIST LOADED with accessorials' and 'Rating Qty 2,271. MIL'. Below this is a table of charges:

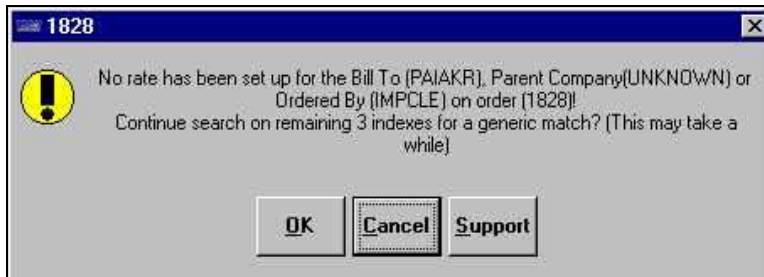
Commodity	Actual Qty	Actual Unit	Charge Item	Chrg Qty	Fix	Rate Unit	Rate	Fix	Rate	Linehaul Chrg	Fix Chrgs
FURN	16.0	PCS	Freight (Distance)	2271	Not Fixed	\$/Mile	1.7500			\$3,974.25	

The primary rate ID is displayed and a note indicates that the rate has accessorial charges linked to it

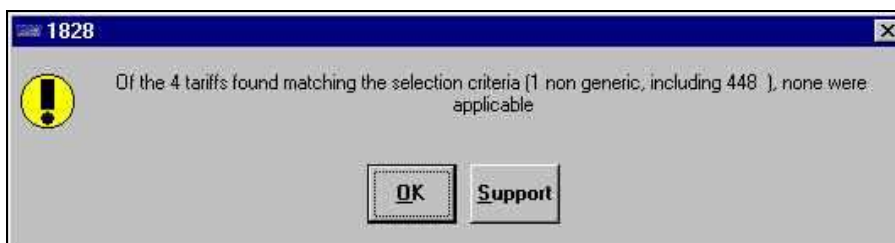
2. The order does not match any rates set up for specific Bill To, Parent, or Order By companies.

If the order does not match any of the line haul rates your company has set up for specific Bill To, Parent, or Order By companies, by default the system displays a message indicating this.

1. For example:

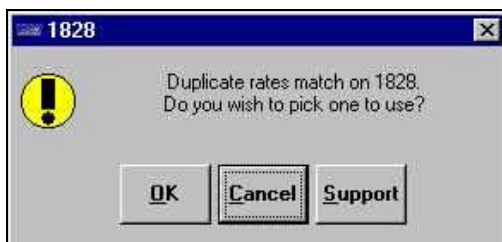


2. Click **OK** to compare the order with *generic* rates that do not specify a particular Bill To, Parent, or Order By company. If it finds one that matches the order, it applies that rate. If none of the generic rates applies, a message similar to the following is shown:



3. **The order matches more than one rate.**

If the order matches more than one rate, by default a message indicating this is displayed.



When you click **OK**, the system displays the Choose Rate window.

Rate #	Rate ID	Item	Rate Description	Index #	Index Description	Chg Item	Unit	Rateu
270	DISTANCE 1		generic - no restrictions	275		Freight (Distance)	Miles	\$/Mile
498	LBS/METR TONS			534		LBS/Metric tons	Pound:\$/MetricT	

Highlight the rate you want applied to the order and click **OK**.

Note: If desired, you can retain the rate applied by prerating to be retained when the order goes through the invoicing process. In the order header, select the **LH** check box, located next to the **Linehaul Charges** field. Then save the order.

How the system applies rating for accessorials in Rate by Total mode

The system applies rates for accessorial charges in the following order:

- **Secondary**
The customer is always billed for these accessorial charges when a specific primary rate is applied to the order.
Note: See Scenario 1 in the **How the system applies primary rates** section.
- **Linked line item**
The customer is billed for these accessorial charges when a \$0 accessorial has been added to the order in the Accessorial and Secondary Charges window *and* a specific primary rate is applied to the order.
Note: For more information on manually adding accessorial charges to an order, refer to the **Recording accessorial charges for an order** section.
- **Line item**
The customer is billed for these accessorial charges when a \$0 accessorial has been added to the order in the Accessorial and Secondary Charges window.
Note: For more information on manually adding accessorial charges to an order, refer to the **Recording accessorial charges for an order** section.

If the order contains \$0 accessorials, three scenarios can result.

1. An applicable linked line item rate is found

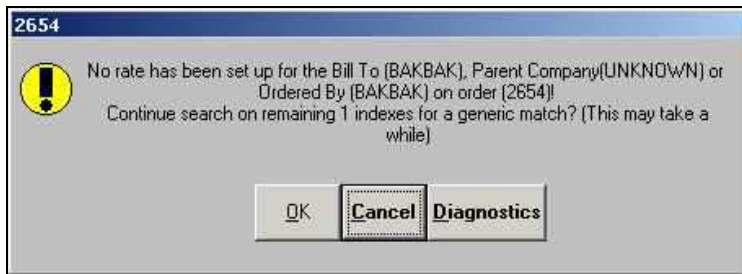
The applied rate is noted in the Accessorial and Secondary Charges window.

Accessorial and Secondary Charges						
Order #: 2654						
Charge Item	Charge Qty	Rate	Charge	Fix		
Detention for trailer load	1.00 @	\$35.0000 =	\$35.00		Commod: FURN	FURNITURE/ANTIQUES
					Loc: BAKBAK	BAKER'S RARITIES
					Tarif#: 587 DET FDR TRL LOA	BAKERSFIELD,CA/

Note: When accessorials are manually added in the Accessorial and Secondary Charges window, the system displays a notation to that effect. In the example shown here, note that the system has removed the "Manually added in Order Entry" notation from the \$0 accessorial.

2. No applicable linked line item rate is found.

If no linked line item rate is attached to the applied primary rate, the system will display a message similar to the following:



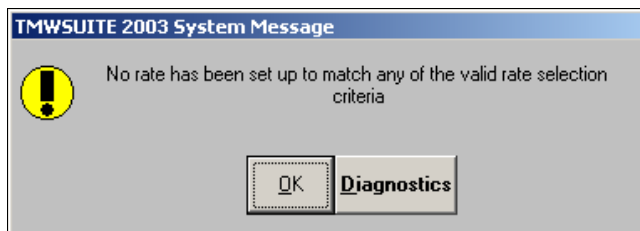
a. If you click on **OK**, the system will search for an applicable line item rate.

- If one is found, it will be applied.

In the example shown here, note that the system replaced the "Manually added in Order Entry" notation from the \$0 accessorial with "Pre-rated Line Item charge".

Accessorial and Secondary Charges						
Order #: 2654						
Charge Item	Charge Qty	Rate	Charge	Fix		
Detention for trailer load	1.00	\$45.0000	\$45.00		Commod: FURN	FURNITURE/ANTIQUES
Pre-rated Line Item charge					Tarif#: 435 DET FOR	
					Loc: BAKBAK	BAKER'S RARITIES BAKERSFIELD, CA/

- If no applicable line item rate is found, the system displays this message:

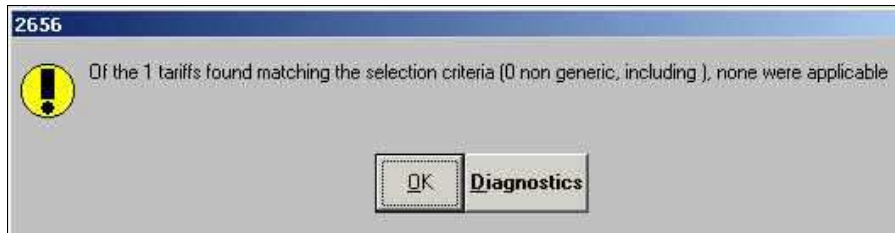


Click **OK** to close the message and complete the rating process.

When no line item rate is applied, the Accessorial and Secondary Charges window still shows the "Manually added in Order Entry" notation and the **Charge** field still shows \$0.00.

Accessorial and Secondary Charges						
Order #: 2664						
Charge Item	Charge Qty	Rate	Charge	Fix		
Minimum Acc Charge	1.00	\$0.0000	\$0.00		Commod: FURN	FURNITURE/ANTIQUES
Manually added in Order Entry					Loc: BAKBAK	BAKER'S RARITIES BAKER

- b. If you click on **Cancel**, the system will display a message similar to this:



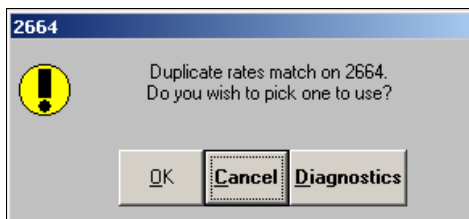
Click **OK** to close the message and let the system complete the rating process.

When you open the Accessorial and Secondary Charges window, you will see that no rate has been applied for the \$0 accessorial.



3. Duplicate line item rates are found.

If duplicate line item rates match the \$0 accessorial, a message similar to this is displayed:



If you click **OK**, the system displays the Choose Rate window

Rate #	Rate ID	Item	Rate Description	Index #	Index Description	Chg Item	Unit	Rateu
504	DET FOR	TRL LOAD	Inv'd detention for trl loading	522		Detention for trailer lo	Hours	\$/Hour
588	DET FOR	TRL LOAD	Inv'd detention for trl loading	608		Detention for trailer lo	Hours	\$/Hour
590	DET FOR	TRL LOAD	Inv'd detention for trl loading	610		Detention for trailer lo	Hours	\$/Hour

Highlight the rate you want applied to the order and click **OK**.

Note: If desired, you can retain both the line haul rate and the accessorial rate(s) when the order goes through the invoicing process. In the order header, select the **ALL** check box, located next to the **Linehaul Charges** field. Then save the order.

Rating an order in Rate by Detail mode

When you use the Rate by Detail mode, the charge for each freight detail on an order is determined separately. Each commodity on an order has its own unique billing rate. When an invoice is prepared for that order, the system applies a separate rate for each commodity. The total line haul charge is the sum of the freight detail charges.

Basic steps for manually rating an order

To manually rate an order, you must enter the freight charge for each commodity in the freight detail portion of the Order Entry Folder.

1. In the Order Entry Folder, look up the order to be rated.
2. In the **Detail View** section of the window, be sure that the **Commodities** radio button is selected.

Each stop for the trip is shown in the lower half of the window. Freight details and charges are recorded for stops.

Commodity	Description	Actual Qty / Unit	Charge Item	Charge Qty	Fix	Rate Unit	Rate	Fix	Charge	Fix\$	Reference#
Pickup at: IMPCLE - IMPERIAL MANUFACTURING - CLEVELAND, OH/CLY											
UNKNOWN/UNKNOWN		0	UNKNOWN (UNK)	0	No		\$0.0000		\$0.00		Ref: VIN
Wgt: 0 LBS	Count: 0 PCS	Vol: 0 CUB	L:	W:	H:	Stackable: <input type="checkbox"/>					
Drop at: REAREA - READING DISTRIBUTION - READING, PA/											
307	MISC PLASTIC PROE	43000 LBS	Freight (Weight) (L)	43000	No	\$/100 lbs	\$1.2500		\$537.50		Ref: VIN
Wgt: 43000 LBS	Count: 0 PCS	Vol: 0 CUB	L:	W:	H:	Stackable: <input type="checkbox"/>					RateQty/Unit

Note: Although freight detail entries can be made for pickups, these entries are informational only. The system does not use them when it totals quantities or freight charges.

In the drop line for the freight detail to be rated, make the appropriate entries in these fields:

3. **Charge Item** Select the appropriate charge type from the drop-down list.

Notes:

1. The **Charge Item** options are set up by your company in the Rate Schedules application.
2. Your selection determines the entry in the **Rate Unit** field, which is display only.

4. **Charge Qty** 5. Enter the number of units on which the rating is to be calculated.

Note: If you entered an amount in the **Actual Qty** field, the system copies that amount into the **Charge Qty** field. However, if the actual quantity transported differs from the charge quantity, make the appropriate entry in the **Charge Qty** field.

6. **Rate** 7. Enter the per unit dollar amount. As you tab from the **Rate** field, the system calculates the charge and displays it in the **Charge** field.

3. Repeat these steps for each freight detail recorded for the order.
4. Save you entries.

Locking in rating information entered for an order

You may occasionally want to protect rating information from being changed by other users who access the order in other applications. The following sections describe the various ways you can freeze rating information on an order.

Fixing a charge quantity so that is not overwritten by the actual quantity

There may be times when you want to assign a charge quantity that is different from the actual quantity that is transported. This fixed amount may affect billing and, if the driver is paid using the same rate unit as the billed charge, settlement of the order.

The **Fix** field in the order header lets you specify that the charge quantity entered in Order Entry should not be reset to the actual quantity in the Invoicing and (if applicable) Settlements applications. This allows you to charge the customer, or pay the resource, for a quantity other than the actual amount.

The screenshot shows a software interface for an order header. A dropdown menu is open for the 'Fix' field, showing three options: 'Not Fixed', 'Inv Only', and 'Inv & Stl'. The 'Not Fixed' option is currently selected. The interface includes various fields for commodity, quantity, unit, rate, and terms, all of which are currently set to 'UNKNOWN' or '0.00'. A 'Status' icon is visible on the left, and 'Total Weight: 0. LBS Pounds' is displayed at the bottom left.

The **Fix** field provides these options:

- *Not Fixed*
The quantity is not fixed; as a result, the actual quantity recorded for the trip will be used (the default)
- *Inv Only*
The quantity is fixed and should be retained when the order is invoiced.
- *Inv & Stl*
The quantity is fixed and should be retained, both when the order is invoiced and when the resource is paid for the trip.

Note: This option is applicable when both the billing rate and the pay rate have the same basis. For example, both rates are based on weight, or on volume, and so on.

For instance, suppose the actual weight for an order is 41,000 pounds, but you negotiate a billing rate based on a quantity of 42,000 pounds. To fix the billing quantity, you must do the following in the order header:

1. Select *Freight (Weight)* in the **Charge Item** field.
2. Enter **42,000** in the **Charge Qty** field.
3. Select *Inv Only* from the drop-down list in the **Fix** field.

This prevents someone from resetting the charge quantity to 41,000 pounds. The quantity of 42,000 is retained even if an applicable weight-based rate has been set up in the Rate Schedules application and you use the **Compute** command to have the system apply the rate. If you leave the *Not Fixed* option selected, when the **Compute** command is used the quantity will be reset to the actual weight for the weight-based rate. The same would hold true for volume- or count-based rates.

Note: When you are in Rate by Total only mode, the `DefaultFixedQty=` setting in the [Order] section of the TTS50.ini file lets you specify the option that will serve as the default for the **Fix** field. This INI setting is *not* operational when you are in Rate by Detail/Rate by Total mode.

Freezing the rate per unit

You can freeze the rate (per unit dollar amount) when you pre-rate an order. You use the **Fix** check box to tell the system that the per unit dollar amount is to remain the same. You can freeze the rate on orders that are pre-rated manually, or on those that were pre-rated using the **Compute** command. When the order is invoiced, the rate remains the same.

Commodity	Description	Actual Qty / Unit	Charge Item	Charge Qty	Fix	Rate Unit	Rate	Fix	Charge	Fix
Pickup at: IMPCLE - IMPERIAL MANUFACTURING - CLEVELAND,OH/CUY 44104										
UNKNOWN	UNKNOWN	0	UNK	UNKNOWN (UNK	0	No	UNKNOWN	\$0.0000		\$0.00
Wgt:	0 LBS	Count:	0 PCS	Vol:	0 CUB	L:	W:	H:	Stackable:	
Drop at: SELSAN - SELECT CHOICE MGF SANDUSKY,OH/										
307	MISC PLASTIC PROD	43000	LBS	Freight (Weight) (L	43000	No	\$/100 lbs	\$1.2000		\$516.00
Wgt:	43000 LBS	Count:	0 PCS	Vol:	0 CUB	L:	W:	H:	Stackable:	

Note: If you attempt to use the **Compute** command when a check mark exists in the **Fix** check box, a message indicates that you cannot compute charges on an order for which the charges are fixed. This means that no rates--including accessorial rates--will be applied.

In the Invoicing application, you can override the Fix Rate setting on a prerated order by clearing the check box.

Edit Invoice Folder (1)

Invoice # 1830A Invoice 1 of 1 Rate Mode: Rate by Detail
0 Trk/Wsh's

Inv. #: 1830A Linehaul Order: 1830 Status: On Hold Move#: 2310 Apply To: 1830A LH

Ship: IMPCLE
IMPERIAL MANUFACTURING
2725 Lander Rd.
CLEVELAND,OH/CUY 44104

Cons: SELSAN
SELECT CHOICE MGF
Street NOF
SANDUSKY,OH/ 44117

Bill To: IMPCLE IMPCL
IMPERIAL MANUFACTURING
2725 Lander Rd.
CLEVELAND,OH/CUY 44104

Ship Date: 06/11/ 18:00 Delivery Date: 06/11/ 09:21 Bill Date: 06/12/ 17:45

RevType1 UNKNOWN Ref Reference # Ctag Jim Sharpe

Curr. Ppd/Col Prepaid MileAdj 0 O/D Miles 61 Tractor UNKNOWN Trailer UNKNOWN

Remarks Rate: UNKNOWN

RevType2 UNKNOWN RevType3 UNKNOWN RevType4 UNKNOWN Driver UNKNOWN StopOfs 0

Charge / Commodity Code	Cmp ID	Count	Volume	Weight	Distance	Quantity	FixQty	Rate	Fix	Charge	Fix
Freight (Weight)	SELSAN		SANDUSKY,OH/								
307	MISC PLASTIC PRODUCT			43,000	61	43,000		1.20	<input checked="" type="checkbox"/>	\$516.00	
Ref#:	Bill of Lading	Pieces	Cubes	Pounds	Miles	Pounds		\$/100 lbs 0			

If you use the Orders Ready to Prepare queue to process prerated orders, the system will not re-rate an order with a fixed rate. For such an order, the Batch Error Log displays a "Charge fixed in OE" message for orders that have the **Fix** check box selected. The fixed rate is retained when the invoice is saved.

I	Title	Message	Date
i	Order 2181, BillToACMASH, BookdByCFRN	Completed processing order: 2181. (1 of 9) at 08:05:46 Tariff 544. Total \$2,287.50	05/30/00
i	Order 2191, BillToAJACAL, BookdByCFRN	Completed processing order: 2191. (2 of 9) at 08:05:47 Tariff 550. Total \$2,437.50	05/30/00
i	Order 2192, BillToAJACAL, BookdByCFRN	Completed processing order: 2192. (3 of 9) at 08:05:47 Tariff 550. Total \$2,437.50	05/30/00
i	Order 2202, BillToBAKBAK, BookdByCFRN	Completed processing order: 2202. (4 of 9) at 08:05:48 Tariff 0. Total \$550.00 Charge fixed in OE	05/30/00
i	Order 2207, BillToBAKBAK, BookdByCFRN	Completed processing order: 2207. (5 of 9) at 08:05:48 Tariff 418. Total \$1,515.50 Charge fixed in OE	05/30/00
i	Order 2208, BillToBAKBAK, BookdByCFRN	Completed processing order: 2208. (6 of 9) at 08:05:49 Tariff 0. Total \$645.75	05/30/00

Buttons: Print, Save As, Delete, Critical Only, Close

Note: The Batch Error Log also shows this message for orders that have the **Fix \$** check box selected.

Using the Fix\$ check box to freeze the charges on an order

There may be times when you want all charges for an order to stay exactly as they have been recorded in Order Entry. In other words, you do not want them to be re-rated later in the Invoicing application. The **Fix\$** check box in any freight detail line allows you to *freeze* all charges on the order.

A check mark in the **Fix\$** check box forces the system to retain the line haul and accessorial charges on a prerated order during the invoicing process. The order cannot be re-rated by means of either the Orders Ready to Prepare queue, or the **Compute** command in the Edit Invoice Folder.

Commodity	Description	Actual Qty / Unit	Charge Item	Charge Qty	Fix	Rate Unit	Rate	Fix	Charge	Fix\$
Pickup at: JMCPL - IMPERIAL MANUFACTURING	CLEVELAND, OH/CLY									
UNKNOWN	UNKNOWN	0	UNKNOWN (UNK)	0	No	UNKNOWN	\$0.0000		\$0.00	
Wgt: 0	LBS	Count: 0	PCS	Vol: 0	CUB	L:	W:	H:	Stackable: <input type="checkbox"/>	
Drop at: SELSAN - SELECT CHOICE MGF	SANDUSKY, OH/									
307	MISC PLASTIC PROI	43000	LBS	Freight (Weight) (L)	43000	No	\$/100 lbs		\$1,2000	\$516.00 <input checked="" type="checkbox"/>
Wgt: 43000	LBS	Count: 0	PCS	Vol: 0	CUB	L:	W:	H:	Stackable: <input type="checkbox"/>	

The Edit Invoice Folder also contains a **Fix\$** check box, which is related to the **Fix\$** check box in the Order Entry application. If a check mark is entered in the **Fix \$** check box on an invoice detail line, this forces the system to retain the charges on a pre-rated order.


The screenshot shows the 'Edit Invoice Folder (1)' window. At the top, it displays 'Order # 1830' and 'Invoice 1 of 1'. Below this, there are fields for 'Inv. # 1830', 'Linehaul Order: 1830', 'Status: On Hold', 'Move#: 2310', and 'Apply To: 1830A LH'. The 'Ship' and 'Cons' addresses are listed, along with 'Ship Date: 06/11/ 08:00' and 'Delivery Date: 06/11/ 09:21'. A 'Bill To' address is also shown. A red message states 'Different Mail To address exists'. Below these are fields for 'RevType1', 'Ref', 'Reference #', 'Ctac: Jim Sharpe', 'Curr: CAN\$', 'Ppd/Col', 'Prepaid', 'MileAdj: 0', 'O/D Miles: 61', 'Tractor: UNKNOWN', and 'Trailer: UNKNOWN'. A 'Remarks' field and 'Rate: UNKNOWN' are also present. At the bottom, there is a table of charges with columns: 'Charge / Commodity Code', 'Cmp ID', 'Count', 'Volume', 'Weight', 'Distance', 'Quantity', 'FixQty', 'Rate', 'Fix Charge', and 'Fix\$'. The first row is 'Freight (Weight)' with 'SELSAN' as the company and 'SANDUSKY, OH/' as the location. The 'Fix\$' column has a checkmark. Below the table, there are 'Ref#' fields for 'Bill of Lading' and 'Pieces', 'Cubes', 'Pounds', 'Miles', and 'Pounds'.

If you find you need to re-rate the order after all, you can clear the check mark from the **Fix\$** check box. Once the check mark is removed, the **Compute** command is enabled. The order then can be re-rated, either by clicking **Compute** in the Edit Invoice Folder, or by processing the order in the Orders Ready to Prepare queue.

Note: Even if the `OverridePreRatingInQueueProcessing=` setting in the [Invoice] section of the TTS50.ini file is set to `Yes`, a check mark in the **Fix\$** check box supersedes the setting. The check marks prevent re-rating of the order in the Orders Ready to Prepare queue.

Letting the system automatically rate an order

If your company has set up billing rates in the Rate Schedules application, you can have the system search through those rates to find one that applies for an order. There are three ways to initiate the automatic rating of an order:

- Click the **Compute**  icon in the sheet toolbar
- Select **Edit > Compute Charge**.
- Use the shortcut keys, CTRL+G.

How the system applies primary rates in Rate by Detail mode

When it attempts to determine the charge for a freight detail, the system compares the conditions of the order with all rates. Four scenarios can result from this comparison.

1. An appropriate rate is found and applied.

If an applicable rate is found, that rate is used to calculate the line haul charge. If secondary rates are attached to the primary rate, those charges are included in the calculation. The line haul amount is shown in the **Charge** field.

The **Charge** field shows the line haul amount for each freight detail

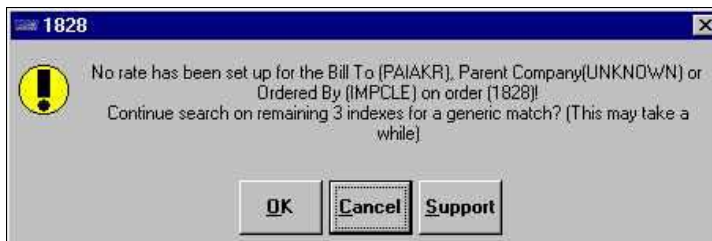
Commodity	Description	Actual Qty / Unit	Charge Item	Charge Qty	Fix	Rate Unit	Rate	Fix	Charge	Fix	Reference#
Pickup at: ROYCAN - ROYAL PACKAGING CO. CANTON OH/											
UNKNOWN	UNKNOWN	0	UNKNOWN	0	No	UNKNOWN	\$0.0000		\$0.00		Ref VIN
Wgt	0 LBS	Count: 0 PCS	Vol: 0 CUB								
Drop at: LOGPIT - LOGAN INDUSTRIES PITTSBURGH PA/											
307	MISC PLASTIC PRODUCT	23000 LBS	Freight (Flat) (FLT)	42000	No	Flat	\$450.0000		\$450.00		Ref VIN
Wgt	23000 LBS	Count: 0 PCS	Vol: 0 CUB								
2820	PIPE_PLASTIC	20000 LBS	Freight (Flat) (FLT)	42000	No	Flat	\$450.0000		\$450.00		Ref VIN
Wgt	20000 LBS	Count: 0 PCS	Vol: 0 CUB								
											Tariff: 143 FLAT RateQty/Unit: 42000
											Tariff: 502 FLAT RateQty/Unit: 42000

If a matching rate is found for a freight detail, the system displays the ID of the rate applied, as well as the rate quantity used to determine the charge. In this example, different rate schedules were found for the two freight details. However, in some cases, the same rate schedule may be applied for multiple freight details.

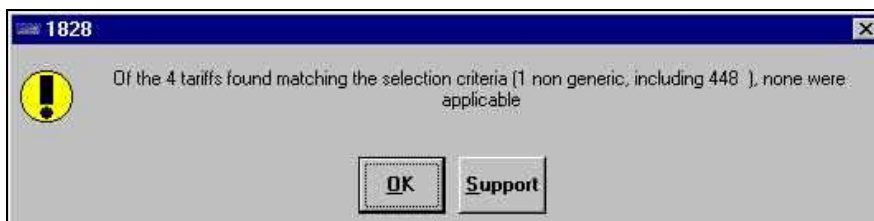
The total line haul amount for all freight details is shown at the top of the order header. The total for any secondary charges applied is shown there as well.

<input type="radio"/> Detail View <input type="radio"/> Stops <input checked="" type="radio"/> Commodities		<input type="radio"/> Rate Mode <input type="radio"/> Total <input checked="" type="radio"/> Detail	
LHaul \$900.00 + Acc \$150.00 = \$1,050.00			

- The order does not match any rates set up for specific Bill To, Parent, or Order By companies. If the order does not match any of the line haul rates your company has set up for specific Bill To, Parent, or Order By companies, a message indicates this. For example:

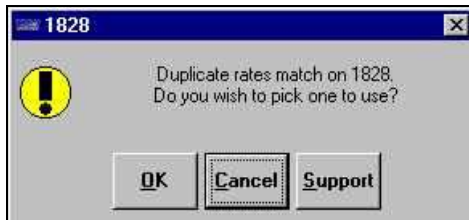


Click **OK** if you want the system to compare the order with *generic* rates, meaning those that do not specify a particular Bill To, Parent, or Order By company. If it finds one that matches the order, it applies that rate. If none of the generic rates applies, a message similar to the following is shown:

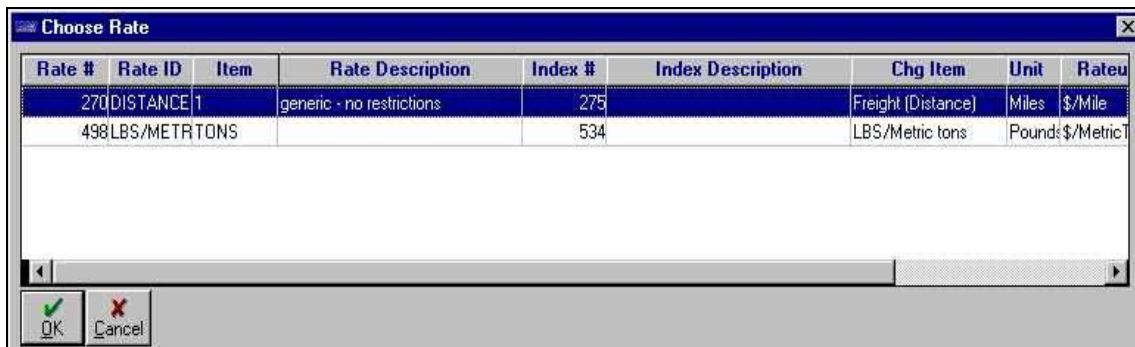


3. The order matches more than one rate.

If the order matches more than one rate, a message indicating this is displayed.



When you click **OK**, the system displays the Choose Rate window.



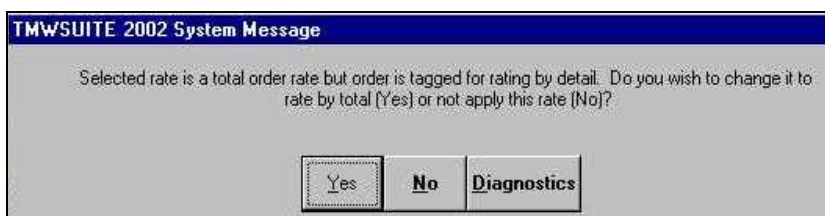
Highlight the rate you want applied to the order and click **OK**.

Note: If you want the rate you entered to be retained when the order goes through the invoicing process, in the order header select the **Fix \$** check box, located to the right of the **Charge** field for the freight detail. Then save the order.

Save the order after you apply the appropriate rate.

4. The applicable rate is based on miles.

In Rate by Detail mode, you cannot use distance-based rates. If a rate is based on miles, this message is shown:



Do one of the following:

- To apply the rate, click **Yes**. The order automatically switches to Rate by Total mode.



Commodities remains the **Detail View** type, but **Rate Mode** switches to Rate by Total.

- If you do not want to apply the rate after all, click **No**.

How the system applies rating for accessorials in Rate by Detail mode

The system applies rates for accessorial charges in the following order:

- Secondary**

The customer is always billed for these accessorial charges when a specific primary rate is applied to the order.

Note: For more information on how secondary rates are applied in Rate by Detail mode, refer to these sections of this chapter:

- Scenario 1 in, **How the system applies primary rates in Rate by Detail mode**.
- How secondary rates are applied in Rate by Detail mode**.
- Using the duplicate secondary rate function**.

- Linked line item**

The customer is billed for these accessorial charges when a \$0 accessorial has been added to the order in the Accessorial and Secondary Charges window *and* a specific primary rate is applied to the order.

Note: For more information on manually adding accessorial charges to an order, refer to the **Recording accessorial charges for an order** section.

- Line item**

The customer is billed for these accessorial charges when a \$0 accessorial has been added to the order in the Accessorial and Secondary Charges window.

Note: For more information about manually adding accessorial charges to an order, refer to the **Recording accessorial charges for an order** section.

If the order contains \$0 accessories, three scenarios can result.


1. An applicable linked line item rate is found.

The applied rate is noted in the Accessorial and Secondary Charges window. In the example shown here, note that the system has removed the "Manually added in Order Entry" notation from the \$0 accessorial.

Accessorial and Secondary Charges						
Order #: 2665						
Charge Item	Charge Qty	Rate	Charge	Fix	Commod	Tariff#
Detention for trailer loac	1.00 @	\$35.0000 =	\$35.00		UNKNOWN UNKNOWN	587 DET FOR TRL LOAI
					Loc:AJAWIL	AJAX BUILDERS SUPPLY WILLOUGHBY,OH /LAK

2. No applicable linked line item rate is found.

If no linked line item rate is attached to the applied primary rate, the system will display a message similar to the following:

2665	
	No rate has been set up for the Bill To (AJAWIL), Parent Company(UNKNOWN) or Ordered By (AJAWIL) on order (2665)! Continue search on remaining 3 indexes for a generic match? (This may take a while)
<input type="button" value="OK"/> <input type="button" value="Cancel"/> <input type="button" value="Diagnostics"/>	

a. If you click on **OK**, the system will search for an applicable line item rate.

- If one is found, it will be applied.

In the example shown here, note that the system replaced the "Manually added in Order Entry" notation from the \$0 accessorial with "Pre-rated Line Item charge".

Accessorial and Secondary Charges						
Order #: 2665						
Charge Item	Charge Qty	Rate	Charge	Fix	Commod	Tariff#
Detention for trailer loac	1.00 @	\$45.0000 =	\$45.00		UNKNOWN UNKNOWN	504 DE
Pre-rated Line Item charge					Loc:AJAWIL	AJAX BUILDERS SUPPLY WILLOUGHBY,OH /LAK

- If no applicable line item rate is found, the system displays this message:

TMWSUITE 2003 System Message	
	No rate has been set up to match any of the valid rate selection criteria
<input type="button" value="OK"/> <input type="button" value="Diagnostics"/>	

Click **OK** to close the message and complete the rating process.

When no line item rate is applied, the Accessorial and Secondary Charges window still shows the "Manually added in Order Entry" notation and the **Charge** field still shows \$0.00.

b. If you click on **Cancel**, the system will display a message similar to this:

Click **OK** to close the message and let the system complete the rating process.

When you open the Accessorial and Secondary Charges window, you will see that no rate has been applied for the \$0 accessorial.

3. Duplicate line item rates are found.

If duplicate line item rates match the \$0 accessorial, a message similar to this is displayed:

If you click **OK**, the system displays the Choose Rate window.

Rate #	Rate ID	Item	Rate Description	Index #	Index Description	Chg Item	Unit	Rateu
504	DET FOR	TRL LOAD	Inv'd detention for trl loading	522		Detention for trailer lo	Hours	\$/Hour
588	DET FOR	TRL LOAD	Inv'd detention for trl loading	608		Detention for trailer lo	Hours	\$/Hour
590	DET FOR	TRL LOAD	Inv'd detention for trl loading	610		Detention for trailer lo	Hours	\$/Hour

Highlight the rate you want applied to the order and click **OK**.

Switching the rating mode after pre-rating an order

If you switch from Rate by Detail to Rate by Total, the system warns that switching rating modes will delete the rate.

For example, you have an order that has been pre-rated in Rate by Detail mode. The line haul charges calculated for each commodity are added and shown in the order header:

Order Entry Folder (1)

Order # 2643

Detail View Stops Commodities Rate Mode Total Detail

Ord ID: 2643 **LHaul \$535.10 + Acc \$0.00 = \$535.10**

Order By: AJAWIL AJAX BUILDERS SUPPLY Willoughby, OH /LAK Earliest Latest Contact: J. Sand

Shipper: AJAWIL AJAX BUILDERS SUPPLY Willoughby, OH /LAK Pickup: 07/28/ 08:00 07/28/ 08:00

consignee: DREMEN DREAM HOME BUILDER Mentor, OH/ Drop: 07/28/ 08:05 07/28/ 08:05

Bill To: AJAWIL AJAX BUILDERS SUPPLY Willoughby, OH /LAK Rmk:

Status Total Weight: **290.0 LBS Pounds** Ord Available: 07/28/ 12:24 RevType1 Intrastate Terms: Net 15 Length: .00

Ord Available Volume: **6.68 CUB Cubes** Booked: 07/28/ 12:24 RevType2 UNKNOWN Priority: UNKNOWN Width: .00

Inv: Pending Count: 0.0 PCS Pieces Placed: 07/28/ 12:24 RevType3 UNKNOWN Currency: \$ U.S. Height: .00

St: UNKNOWN Miles: 5 Mil Table: 0 RevType4 UNKNOWN Company: UNKNOWN

O/D Miles: 5 Stops: 2 OrdMiscQty1 0.00

k: RevType1 UNKNOWN BK'd By: CFRN COD: 0.00 Fgt Val: 0.00 Temp Lo/Hi: 0 0 Fahrenheit Trailer 1 UNKNOWN

Commodity	Description	Actual Qty	/ Unit	Charge Item	Charge Qty	Fix	Rate Unit	Rate	Fix	Charge	Fix\$	Reference#
Pickup at: AJAWIL - AJAX BUILDERS SUPPLY	WILLOUGHBY, OH /LAK											
UNKNOWN	UNKNOWN	0		UNKNOWN (UNK)	0	No	UNKNOWN	\$0.0000		\$0.00		Ref: BL#
Drop at: DREMEN - DREAM HOME BUILDERS	MENTOR, OH/											
HNGL	FIBERGLASS SHING	200	LBS	Freight (Weight) (L)	200	No	\$/100 lbs	\$10.2500		\$20.50		Ref: BL#
RYMUD	DRYWALL JOINT CO	50	GAL	Freight (Volume) (G)	50	No	\$/Gallon	\$10.2500		\$512.50		Ref: BL#
RYSCRW	DRYWALL SCREWS	40	LBS	Freight (Weight) (L)	40	No	\$/100 lbs	\$5.2500		\$2.10		Ref: BL#

The line haul charge for each commodity is shown in the appropriate freight detail line.

When you select the **Total** radio button in the **Rate Mode** section of the window, the system displays the following warning:

Warning

 The rate entered will be deleted. Are you sure you want to change the rate mode?

If you click **Yes**, the order display is refreshed. No charges are shown for the order. The total line haul charges revert to \$0.

Order Entry Folder (1)

Order # 2643

Detail View
 Stops
 Commodities
 Rate Mode
 Total
 Detail

Ord ID: 2643

LHaul \$0.00 + Acc \$0.00 = \$0.00

Order By: AJAWIL AJAX BUILDERS SUPPLY WILLoughBY.OH /LAK Earliest Latest Contact: J. Sand

Shipper: AJAWIL AJAX BUILDERS SUPPLY WILLoughBY.OH /LAK Pickup: 07/28/ 08:00 07/28/ 08:00

onsignee: DREMEN DREAM HOME BUILDER MENTOR.OH/ Drop: 07/28/ 08:05 07/28/ 08:05 Rating Qty . LBS

Commodity	Actual Qty	Actual Unit	Charge Item	Chrg Qty	Fix	Rate Unit	Rate	Fix	Linehaul Chrg	Fix \$
HNGL FIBERGLASS SHING	290.0	LBS	UNKNOWN	250	Not Fixed		0		\$0.00	

Bill To: AJAWIL AJAX BUILDERS SUPPLY WILLoughBY.OH /LAK Rmrk:

Status: Total Weight: **290.0 LBS Pounds** Ord Available: 07/28/ 12:24 RevType1 Intrastate Terms: Net 15 Length: .00

Ord Available Volume: **6.68 CUB Cubes** Booked: 07/28/ 12:24 RevType2 UNKNOWN Priority: UNKNOWN Width: .00

Inv: Pending Count: 0.0 PCS Pieces Placed: 07/28/ 12:24 RevType3 UNKNOWN Currency: \$ U.S. Height: .00

Sit: UNKNOWN Miles: 5 Mil Table: 0 OrdMiscQty1 0.00 RevType4 UNKNOWN Company: UNKNOWN

k: RevType1 UNKNOWN Bk'd By: CFRN COD: 0.00 Fgt Val: 0.00 Temp Lo/Ht: 0 0 Fahrenheit Trailer 1 UNKNOWN

Commodity	Description	Actual Qty	Unit	Charge Item	Charge Qty	Fix	Rate Unit	Rate	Fix	Charge	Fix \$	Reference#
Pickup at: AJAWIL - AJAX BUILDERS SUPPLY	WILLoughBY.OH /LAK											
UNKNOWN	UNKNOWN	0		UNKNOWN (UNK	0	No	UNKNOWN	\$0.0000		\$0.00		Ref: BL#
Drop at: DREMEN - DREAM HOME BUILDERS	MENTOR.OH/											
HNGL	FIBERGLASS SHING	200	LBS	UNKNOWN (UNK	0	No	\$/100 lbs	\$0.0000		\$0.00		Ref: BL#
RYMUD	DRYWALL JOINT CO	50	GAL	UNKNOWN (UNK	0	No	\$/Gallon	\$0.0000		\$0.00		Ref: BL#
RYSCRW	DRYWALL SCREWS	40	LBS	UNKNOWN (UNK	0	No	\$/100 lbs	\$0.0000		\$0.00		Ref: BL#

If you select the **Detail** radio button to switch back to Rate by Detail mode, you must use the **Compute** command to rerate the order.

Note: If you pre-rate the order in Rate by Total mode and switch to Rate by Detail mode, the rate is not deleted. Therefore, the warning is not displayed.

Recording accessorial charges for an order

Accessorial labor charges are fees for labor, unrelated to driving, which is performed by a driver during the course of a trip. Examples of accessorial labor include:

- Loading/unloading detention
- Fuel surcharge
- Stop charges
- Special services performed by your company for its customers.

Accessorial charges can be added to an order in two ways:

- They can be assigned manually.
- They are applied automatically by the system when you use the **Compute** command. In this case, the accessorials are determined by secondary rates that are linked to the primary (line haul) rate.


In Order Entry, you use the Accessorial and Secondary Charges window to look up existing accessorials, or to specify that an accessorial charge be added to an order.

The Accessorial and Secondary Charges window is shown here with sample data.

Accessorial and Secondary Charges					
Order #: 2667					
Charge Item	Charge Qty	Rate	Charge	Fix	
UNKNOWN		\$0.0000 =	\$0.00		Commod: UNKNOWN UNKNOWN
		Manually added in Order Entry			Loc: UNKNOWN
Total Accessorial Charges:		\$0.00	Included in LH: \$0.00	1 accessorials	
Total Taxes:		\$0.00		0 tax item	
<input type="button" value="Add"/> <input type="button" value="Delete"/> <input type="button" value="Close"/>					

Adding an accessorial charge manually

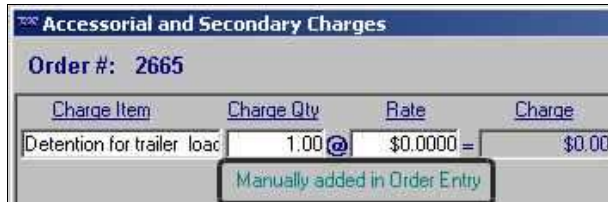
To manually add an accessorial charge to an order, follow these steps:

1. Do one of the following to open the window:
 - Click the **Accessorial**  icon in the sheet toolbar.
 - Select **Edit > Accessorial Charges**.
 - Press CTRL+SHIFT+G.
2. Do one of the following to record an accessorial charge:
 - Click **Add** to add an accessorial charge to the end of the list.
 - Click **Insert** to add a new accessorial charge before an existing charge.
3. Make entries in these fields:

Charge Item	Click in this field for the drop-down list of accessorial charge types that have been set up for your company. Select the one that applies.
Charge Qty	Enter the rating quantity that will be used to determine the charge. Note: By default, the system automatically displays a value of 1 (one) in this field.
Rate	Enter the per unit charge, which the system multiplies by the number in the Charge Qty field to determine the total charge for the accessorial labor. Note: If a default rate was entered for the charge type at the time it was defined, that rate is displayed automatically. Enter the desired rate if the default is not correct or is not shown.
Charge	This field shows the dollar figure that results when the system multiplies the rate by the quantity to determine the total charge for the accessorial labor.
Commod	Enter the unique code that identifies the goods associated with this charge. If the accessorial is not associated with a particular commodity, leave this field blank. Note: Your company defines commodity codes in the commodity master file within the File Maintenance application
Commodity Description	This field is untitled. It displays the commodity name associated with the code you entered in the Commod field.
Loc	Company ID for the location where the accessorial labor is to occur
Location Name	This field is read-only. If you entered a company ID in the Loc field, this field shows the name and location of that company.

Total Accessorial Charges This field, displayed in the lower middle portion of the window, shows the dollar figure that is the sum of all accessorial charges recorded for the order.

When you manually add accessorial charges in Order Entry, the Accessorial and Secondary Charges window shows a message to that effect.



Indicates that the charge was added manually in Order Entry

Applying accessorial charges during the automatic rating process

When you click the **Compute** icon to pre-rate an order, the system automatically attempts to match the order with the appropriate line haul and accessorial rates.

How secondary rates are applied in Rate by Total mode

After the system finds and applies a line haul rate for an order, it checks to see whether any secondary rates linked to that rate are applicable. If the order meets the restrictions recorded for a secondary rate, the rate is applied automatically. In the Accessorial and Secondary Charges window, a message is shown below the charge to indicate that it was added during the automatic rating process.



Indicates the charge was added due to application of a secondary rate

How secondary rates are applied in Rate by Detail mode

When you use Rate by Detail mode, the line haul charge for each freight detail on an order is determined separately. Depending on rate restrictions and order data, one or both of the following occurs when an order is rated:

- The same primary rate applies to multiple freight details. Therefore, it is pulled multiple times during the rating process.
- Different primary rates apply for different freight details on the order.

Each time a primary rate is applied, the system checks to see if any secondary rates attached to it match the order. If they do, they are applied automatically. However, sometimes the same secondary rate is attached to multiple primary rates. In other cases the same primary rate is applied to multiple freight details. In these situations, the system attempts to apply the same secondary rate multiple times.

Using the duplicate secondary charge function, you can configure the system to do one of the following:

- Display a message asking whether the first instance of the secondary charge should be replaced by the second one.
- Automatically replace the first secondary charge with the second one.
- Keep the first secondary charge *and* apply the additional one.

The system uses this feature when all the following circumstances apply:

- The order is being auto rated.
- Rate by Detail mode is being used.
- There are multiple commodities on the order.
- Multiple primary rates apply to the order, or the same primary rate is applied multiple times.
- The same secondary rate is attached to two or more primary rates, or the same primary rate is applied multiple times and it has secondary rate(s) attached.

Using the duplicate secondary charge function

To use the duplicate secondary charge function, you must use the `HandlingOfDuplicateSecondaryCharges=` setting in the `[Tariff]` section of the `TTS50.ini` file.

[Tariff] HandlingOfDuplicateSecondaryCharges


Applies to	TMWSuite
Description	Sometimes when you use the Rate by Detail rating mode, your rate setup may cause the system to attempt to apply the same accessorial charge more than once for an order. This setting determines how the system will handle duplicate secondary charges.
Options	<ul style="list-style-type: none"> • <i>Ask (default)</i> Displays a message asking whether the first secondary charge should be replaced by the second one. • <i>Replace</i> Automatically replaces the first secondary charge with the second one. Note: This works well if the secondary charge is based on revenue, because the revenue has changed since the last accessorial was created. • <i>AddAdditional</i> Keep the first secondary charge <i>and</i> apply the second one. Warning: When this option is used, the system will add new accessorial details <i>every</i> time the order is re-rated. For example, if the order originally had one accessorial and it has been re-rated twice, the order will have three accessorial details for the same charge type.

The following steps illustrate how this feature is used on a typical order in Order Entry.

1. Create an order in the Order Entry application using the Rate by Detail mode.

The screenshot shows the Order Entry application window for Order # 7774. The interface includes fields for Order ID, Order By (FDC/JOS), Shipper (FDC/JOS), Consignee (DANNEN), and various dates and times. A summary section shows L Haul \$0.00 and Acc \$0.00. Below this is a table of commodity details with columns for Commodity, Description, Actual Qty / Unit, Charge Item, Charge Qty, Rate Unit, Rate, and Reference #.

Commodity	Description	Actual Qty / Unit	Charge Item	Charge Qty	Rate Unit	Rate	Reference #	
PUL	PULP	0.05 Count	UNKNOWN [UNK]	5000 [GAL]	L	W	H	Stackable
DIESEL	DIESEL FUEL	3000 [GAL]	UNKNOWN [UNK]	0.00	UNKNOWN	\$0.0000	\$0.00	Ref Bill of Lading
PUL	PULP	0.05 Count	UNKNOWN [UNK]	3000 [GAL]	L	W	H	Stackable
DRP	DRP	0.05 Count	UNKNOWN [UNK]	5000 [GAL]	L	W	H	Stackable
DIESEL	DIESEL FUEL	3000 [GAL]	UNKNOWN [UNK]	0.00	UNKNOWN	\$0.0000	\$0.00	Ref Bill of Lading
DRP	DRP	0.05 Count	UNKNOWN [UNK]	3000 [GAL]	L	W	H	Stackable

2. Add commodities for which you have set up billing rates.
3. Click the **Compute**  icon in the sheet toolbar. After the system applies each primary rate, it then applies any matching secondary rates that are linked to that primary rate. If it finds duplicate secondary rates it will do one of the following, depending on how the HandlingOfDuplicateSecondaryCharges= setting is set:
 - a. Ask

The system displays a message like the following, asking whether the first secondary charge should be replaced by the second one.

The screenshot shows a dialog box titled "Compute Charge" with a question mark icon. The text inside reads: "A Hazardous Material charge of 1500.00 at 0.05 for 75.00 already exists. Replace with a Hazardous Material charge of 0.05 per at recomputed quantity?" Below the text are three buttons: "Yes", "No", and "Support".


- Click **Yes** to have the system replace the existing secondary charge.
Note: This works well if the secondary charge is based on total line haul revenue, because the revenue is more accurate now than it was when the last accessorial was created.
- Click **No** if you do not want the system to replace the existing secondary charge.




b. Replace

The system automatically replaces the first secondary charge with the second one. No message is shown.

c. AddAdditional

The system will keep the first secondary charge *and* apply the second one.

4. To view the secondary charges, click the **Accessorial Charges**  icon to open the Accessorial and Secondary Charges window.
 - With the `HandlingOfDuplicateSecondaryCharges=` setting set to either `Ask` or `Replace`, the system only adds one secondary charge for Hazardous Materials.


Accessorial and Secondary Charges						
Order #: 1774						
Charge Item	Charge Qty	Rate	Charge	Commod		Tariff#
Hazardous Material	2,550.00 @	0.0500 =	\$127.50	UNKNOWN	Haz/Mat Charge - Fuel	546 SECONDARY HAZ
Pre rated secondary charge						
				Loc: UNKNOWN		
Total Accessorial Charges:			\$127.50	Included in LH: \$0.00		1 accessorials
  						

- With the setting as `HandlingOfDuplicateSecondaryCharges=AddAdditional`, the system adds two secondary charges for Hazardous Materials.

Accessorial and Secondary Charges						
Order #: 1774						
Charge Item	Charge Qty	Rate	Charge	Commod		Tariff#
Hazardous Material	2,550.00 @	\$0.0500 =	\$127.50	UNKNOWN	Haz/Mat Charge - Fuel	546 SECONDARY HAZ
Pre rated secondary charge						
				Loc: UNKNOWN		
Hazardous Material	2,550.00 @	0.0500 =	\$127.50	UNKNOWN	Haz/Mat Charge - Fuel	546 SECONDARY HAZ
Pre rated secondary charge						
				Loc: UNKNOWN		

Deleting an accessorial charge from an order

Accessorial charges can be removed from an order using the Accessorial and Secondary Charges window

1. Do one of the following to open the window:
 - Click the **Accessorial**  icon in the sheet toolbar.
 - Select **Edit > Accessorial Charges**.
 - Press CTRL+SHIFT+G.
2. Position the cursor in any field in the charge line for the accessorial to be deleted.
3. Click **Delete**.
4. A confirmation dialog box displays.
 - Select **Yes** to delete the accessorial charge.
 - Select **No** to cancel the deletion.

Rating a list of orders

You can pre-rate orders on a one-by-one basis or you can retrieve a group of orders and pre-rate them using the **Edit > Compute by Queue** command. You can also use it to re-rate a group of orders that have already been pre-rated. Whether you are pre-rating the orders for the first time, or re-rating them, you can preview the charges before you apply them to the orders.

Retrieving orders for rating

The **Compute by Queue** command displays the Batch Rating window, which allows you to retrieve a queue, or list, of orders to be rated.

The screenshot shows the 'Batch Rating' window with the following fields and controls:

- Rated Status: Not rated Rated All
- Bill To:
- Booked Date: Tariff #:
- Ship Date: Tariff ID:
- Order Status: Tariff Item:
- RevType1: RevType2: RevType3: RevType4:

Order #	Ship Date	Bill To	City	Ord S	Total	Charg	Tariff #	Tariff ID	Tariff Item

Buttons at the bottom: Retrieve, Reset, Preview Only, Process and Update, Close

Note: If your system is configured to use the Rate by Detail rating method, the Batch Rating window includes the **Rate Mode** options. The **Detail** radio button is selected by default.

This close-up shows the 'Rate Mode' and 'Rated Status' options:

- Rate Mode: Total Detail
- Rated Status: Not rated Rated All

To limit the list of orders, enter the necessary restrictions in the selection criteria fields.

- Rate Mode** The Rate Mode options display only when your system is set up to use the Rate by Detail rating method.
- The system provides two ways to rate orders, Rate by Total and Rate by Detail. Rating by total means that the charge for an order is based on a total for all stops. The same rating method, such as weight or mileage, applies to all stops. Rating by detail means that the charge for each freight detail on an order is determined separately from the others, i.e., each commodity on an order has its own unique rate.
- Select the appropriate radio button, **Total** or **Detail**, for the rating method used for the orders you want to retrieve.
- Note:** If your system is configured for the Rate by Detail rating method, the **Detail** radio button is selected by default when you first open the Batch Rating window, or when you click the **Reset** button.
- Rate Status** An order is considered rated if it has a line haul charge that is greater than zero. That charge may be the result of auto-rating, i.e., the system has compared the order with established rates and selected one that is applicable. The line haul charge may also be the result of manual rating, i.e., a user has manually entered the charge, in which case, no rate is associated with the order.
- Select the appropriate radio button to specify the rating status of the orders you want to retrieve.
- **Not Rated**
Limit the retrieval to orders that match the rest of the criteria and for which no line haul charge exists
Note: If this option is selected, the tariff fields (Tariff #, Tariff ID, Tariff Item) are not available.
 - **Rated**
Limit the retrieval to orders that match the rest of the criteria and for which a line haul charge exists
Note: If this option is selected but you leave the tariff fields (Tariff #, Tariff ID, Tariff Item) blank, all rated orders matching the rest of the criteria will be retrieved, whether they were rated manually or using auto-rating.
 - **All**
Retrieve orders that match the rest of the selection criteria and ignore their rating status.
Notes:
 1. If this option is selected but you leave the tariff fields (Tariff #, Tariff ID, Tariff Item) blank, all orders, both rated and unrated, will be retrieved.
 2. By default, the **All** radio button is selected when you first open the Batch Rating window, or when you click the **Reset** button.

- Bill To** To retrieve orders for a specific customer, select the required company ID from the drop-down list.
- Booked Date** Two text boxes are provided for you to enter a date range for the booked date on the orders you want to retrieve. The booked date on an order may be helpful in selecting orders processed within a certain period. The booked date is the date the order was submitted by the customer.
- Booked Date:** **Thru**
- Enter the beginning date/time of the range in the first field; enter the ending date/time of the range in the second field.
- Ship Date** Two text boxes are provided for you to enter a date range for the ship date on the orders you want to retrieve. The ship date is the date the pickup was made at the shipper's location.
- Ship Date:** **Thru**
- Enter the beginning date/time of the range in the first field; enter the ending date/time of the range in the second field.
- Inv Effct Date** Not functional
- Order Status** Use the drop-down list to select the status of the orders for which you want to search. The options are:
- *Live orders, not invoiced*
Retrieve orders that match the rest of the selection criteria and have a status of *Available, Planned, Dispatched, Started, or Completed*.
 - *Master Orders*
Retrieve orders that match the rest of the selection criteria and have a status of *Master*.
Note: A master order is an order template from which future orders can be copied
 - *Quotes*
Retrieve orders that match the rest of the selection criteria and have a status of *Quote*.
 - *Pending or tendered*
Retrieve orders that match the rest of the selection criteria and have a status of *Pending* or *Tendered*.
- Order Number Range** Use the **Lowest** and **Highest** fields to set a range of order numbers.

Tariff # This field is available only when the **Rated** or the **All** radio button is selected. You can search for orders for which the system has used a specific *primary* rate to calculate charges.

Use the text box to enter the Rate # of the rate by which orders have been rated. For example, if you need to re-rate orders for which charges were calculated using a now expired rate, you would enter that rate's system-assigned numeric ID in the text box.

Rate # is assigned by the system

Note: If you specify the Tariff #, the Tariff ID and Item are not needed; the system makes their fields unavailable.

Tariff ID This field is available only when the **Rated** or the **All** radio button is selected. You can search for orders for which the system has used a specific *primary* rate to calculate charges.

Use the text box to enter the Rate ID of the rate by which orders have been rated. For example, if you need to re-rate orders for which charges were calculated using a now expired rate, you would enter that rate's user-assigned ID in the text box.

Rate ID is user-assigned

Note: If you specify the Tariff ID, be sure to enter it exactly as it was recorded in the Edit Billing Rate Folder. You may also enter the Tariff Item if desired. The Tariff # is not needed; the system makes its field unavailable.

Tariff Item This field is available only when the **Rated** or the **All** radio button is selected. You can search for orders for which the system has used a specific *primary* rate to calculate the line haul charge.

Use the text box to enter the Rate Item of the rate by which orders have been rated. For example, if you need to re-rate orders for which charges were calculated using a now expired rate, you would enter that rate's user-assigned description in the text box.

Rate Item is user-assigned

Note: If you specify the Tariff Item, be sure to enter it exactly as it was recorded in the Edit Billing Rate Folder. You may also enter the Tariff ID if desired. The Tariff # is not needed; the system makes its field unavailable.

Parent ID	<p><i>First available in 2021.1</i></p> <p>To retrieve orders for a specific Parent company, select the company ID from the drop-down list.</p> <p>Note: In the Company profile, you designate a company as a parent company. Then, you may link multiple subcompanies or divisions to that parent company. Setting up a parent and divisions is useful when billing rates for subcompanies are based on the parent.</p>
RevType1	<p>This restriction corresponds to the RevType1 field in the order header.</p> <p>Use the drop-down list to limit the retrieval to orders that match all other criteria and that have this value in the order header RevType1 field.</p> <p>Note: The name and options for this field are user-defined, using the RevType1 label in the System Administration application.</p>
RevType2	<p>This restriction corresponds to the RevType2 field in the order header.</p> <p>Use the drop-down list to limit the retrieval to orders that match all other criteria and that have this value in the order header RevType2 field.</p> <p>Note: The name and options for this field are user-defined, using the RevType2 label in the System Administration application.</p>
RevType3	<p>This restriction corresponds to the RevType3 field in the order header.</p> <p>Use the drop-down list to limit the retrieval to orders that match all other criteria and that have this value in the order header RevType3 field.</p> <p>Note: The name and options for this field are user-defined, using the RevType3 label in the System Administration application.</p>
RevType4	<p>This restriction corresponds to the RevType4 field in the order header.</p> <p>Use the drop-down list to limit the retrieval to orders that match all other criteria and that have this value in the order header RevType4 field.</p> <p>Note: The name and options for this field are user-defined, using the RevType4 label in the System Administration application.</p>

When all desired restrictions have been set, click the **Retrieve** button, located in the window's lower left corner. The bottom half of the window displays a list of all orders matching your restrictions.

The screenshot shows the 'Batch Rating' window with the following search criteria:

- Rated Status: Not rated Rated All
- Bill To: CARCLE CARRIE'S CURIOSITIES
- Booked Date: 02/25/ 00:00 Thru 02/28/ 23:59
- Ship Date: 01/01/ 00:00 Thru 12/31/ 23:59
- Order Status: Live orders, not invoiced
- RevType1: UNKNOWN
- RevType2: UNKNOWN
- RevType3: UNKNOWN
- RevType4: UNKNOWN

The table below shows the data for the orders:

Order #	Ship Date	Bill To	City	Ord S	Total Chrg	Tariff #	Tariff ID	Tariff Item	RevType1	RevType2	RevType3	RevTy
2047	02/25/	13:05 CARCLE	CARRIE'S CURIOSITIES	CLEVELAND,OH/CUY	AVL	\$0.000			LONG	UNK	UNK	UNK
2048	02/25/	13:05 CARCLE	CARRIE'S CURIOSITIES	CLEVELAND,OH/CUY	AVL	\$0.000			LONG	UNK	UNK	UNK
2049	02/25/	13:05 CARCLE	CARRIE'S CURIOSITIES	CLEVELAND,OH/CUY	AVL	\$0.000			LONG	UNK	UNK	UNK
2050	02/25/	13:05 CARCLE	CARRIE'S CURIOSITIES	CLEVELAND,OH/CUY	AVL	\$0.000			LONG	UNK	UNK	UNK
2067	02/28/	14:28 CARCLE	CARRIE'S CURIOSITIES	CLEVELAND,OH/CUY	AVL	\$0.000			UNK	UNK	UNK	UNK
2068	02/28/	14:28 CARCLE	CARRIE'S CURIOSITIES	CLEVELAND,OH/CUY	AVL	\$0.000			UNK	UNK	UNK	UNK
2069	02/28/	14:28 CARCLE	CARRIE'S CURIOSITIES	CLEVELAND,OH/CUY	AVL	\$0.000			UNK	UNK	UNK	UNK
2070	02/28/	14:28 CARCLE	CARRIE'S CURIOSITIES	CLEVELAND,OH/CUY	AVL	\$0.000			UNK	UNK	UNK	UNK
8 Orders						\$0.00						

Buttons at the bottom: Retrieve, Reset, Preview Only, Process and Update, Close.

Data for the orders is displayed in the following columns:

- Order #** The system-assigned ID given to the order the first time it was saved.
- Ship Date** The date the pickup was made at the shipper's location.
- Bill To** The ID and name of the company responsible for payment of the charges for the order.
- City** The city/state/county location of the company responsible for payment of the charges for the order.
- Ord Status** The status of the order.
- Total Charge** The total line haul and accessorial charges on the order.
- Tar Number** The system-assigned ID of the rate used to calculate the charges on the order.
Note: Only one rate is displayed for each order. Since the system could use multiple rates to calculate charges for an order rated by detail, this field displays a 0 (zero) as the rate number when you select **Detail** as the rate mode.
- Tariff ID** The user-assigned ID of the rate used to calculate the charges on the order.
Note: Only one rate is displayed for each order. Since the system could use multiple rates to calculate charges for an order rated by detail, this field is left blank when you select **Detail** as the rate mode.

Tariff Item	The user-assigned description of the rate used to calculate the charges on the order. Note: Only one rate is displayed for each order. Since the system could use multiple rates to calculate charges for an order rated by detail, this field is left blank when you select Detail as the rate mode.
RevType1	The value in the RevType1 field in the order header. Note: The name and options for this field are user-defined, using the RevType1 label in the System Administration application.
RevType2	The value in the RevType2 field in the order header. Note: The name and options for this field are user-defined, using the RevType2 label in the System Administration application.
RevType3	The value in the RevType3 field in the order header. Note: The name and options for this field are user-defined, using the RevType3 label in the System Administration application.
RevType4	The value in the RevType4 field in the order header. Note: The name and options for this field are user-defined, using the RevType4 label in the System Administration application.
Booked	The date the order was entered into the system.
Line Haul	The line haul charge on the order.
Accessorial Charges	The total accessorial charges on the order.

To change the selection criteria for a new search, click the **Reset** button. All the fields will return to their default settings.

Rating the list of orders

There are two options for processing orders in the Batch Rating window:

- **Preview Only**
Rates the orders and displays the changes in the Batch/Error Log. The orders are not actually changed. You can use this option to review the charges the rating process would compute before you decide to actually make them.
Note: If you are re-rating orders, the change in charges for each re-rated order is displayed in the Batch/Error Log.
- **Process and Update**
Rates the orders and updates them.

Either option will temporarily minimize the Order Entry Folder. The message area at the bottom of the window displays information about how the queue processing is progressing.




As with all other queue processing, a batch log listing errors and successes is generated.



Notes regarding each order are listed. These notes indicate whether the order was rated/re-rated successfully. They will show the revised charges resulting from a different rate being applied to an order.

The last entry in the log lists total charges, as well as the total dollar amount that makes up the difference between the original total and the revised total.

 OE Rate Q Preview FINAL	Total charges \$16,602.95 - Change in total billing as a result of rating = \$5,736.99 Elapsed time = 0.1 min	03/08/
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You can either print a hardcopy of the log or save it to a file. It is recommended that you do one of these things so that you have a list of the orders that were rated/re-rated. The list is useful to have when you audit the orders for accuracy and completeness.

Note: To view/record the batch ID the system has assigned to the log records of orders processed in this queue, use the horizontal scroll bar at the bottom of the window to display the **Batch#** column.

Reviewing updated orders

The rated/re-rated orders are placed in the queue. If you wish to review the orders individually, you can close the Batch Rating window and use the queue to retrieve the orders.

Note: The retrieved orders are placed in the queue, whether you rate/re-rate them or not. If you review the orders in the queue before rating/re-rating them, you will be displaying the original orders. If you decide to rate/re-rate them, you must retrieve them again.

- To display the queue in a minimized form, click the **Show Queue**  icon in the sheet toolbar or select the **View > Queue** command. With the queue displayed, you can display an order in the Order Entry Folder by clicking on it in the queue.
Notes:
 1. Both the icon and the command can be used to hide/show the queue.
 2. You can keep the queue window in view as you progress through the remaining orders, or you can resize it, if desired. You can also move it by clicking on the window's title bar and dragging it to a different spot.
- To display the orders one at a time, whether the queue is shown or hidden, use the **Next**  or **Previous**  icons in the sheet toolbar. You can also use the **Edit > Next in Queue** or **Edit > Previous in Queue** commands to display the orders.

Updating the start date for master orders

First available in 2021.1

Pre-rating a master order allows you to copy the prerated charges to orders created from the master order.

If you pre-rate your master orders, you should:

- Specify an *in effect* date range on the rate. For example, 1/01/2022 to 12/31/2022.

In Effect:	01/01/22 00:00
To:	12/31/22 23:59

- Update the *start date* on the order each time you negotiate new rates

Otherwise, the system may keep pulling the old rate, instead of the new one.

By default, updating an order's start date is a manual process. However, you can set up the system so that users can edit a master order's start date when they pre-rate it. You activate the feature using the `MasterOrderStartDateUpdate` General Info Table setting. Enter a value of `Y` in the **String1** field.

Note: When rating an order, the rating engine searches for rates that match the trip. The process includes a date verification. The system compares the order's start date to the *effective date range* specified on the rate. If the order's start date does not fall in the rate's effective date range, the system rejects the rate.

To update the start date for master orders:

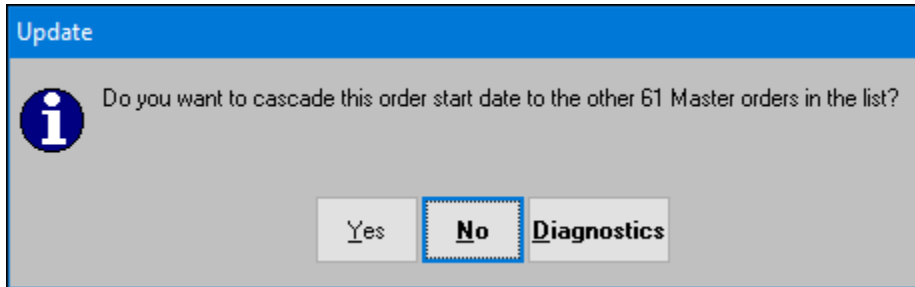
- Go to **Edit > Compute By Queue**.
The Batch Rating window opens.
- In the **Order Status** field, select *Master orders*.
- Set other restrictions as needed.
- Click **Retrieve**.

The queue lists the orders that match the restrictions set.

Order #	Ship Date	Bill To	City	Ord Status	Total Charges	Line Haul	Tariff #	Acc. Charges	RevTy
12227	01/01/	10:00 MEUTOL	TOLEDO,OH/	MST	\$588.00	\$488.00	2248	\$100.00	UNK
12228	01/01/	10:00 MEUTOL	TOLEDO,OH/	MST	\$330.00	\$230.00	2248	\$100.00	UNK
12229	01/01/	10:00 MEUTOL	TOLEDO,OH/	MST	\$552.00	\$452.00	2248	\$100.00	UNK
3 Orders					\$1,470.00				

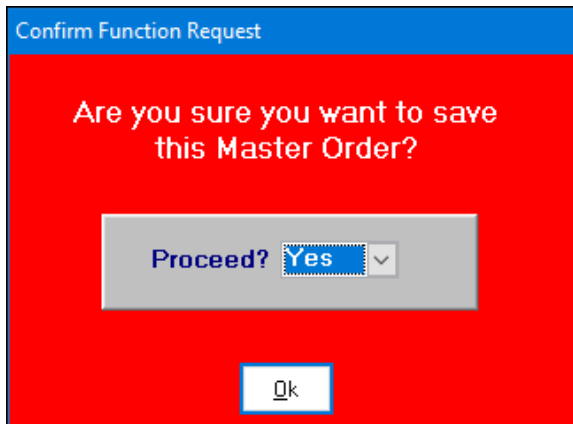
- In the **Ship Date** field, set the new start date.

If you are editing the date in the first row of the queue, an Update message appears when you tab out of the field. It asks, "Do you want to cascade this order start date to the other 00 Master orders in the list?"



Note: The **Ship Date** field is editable only when you have **Y** set in the **String1** field of the `MasterOrderStartDateUpdate` General Info Table setting.

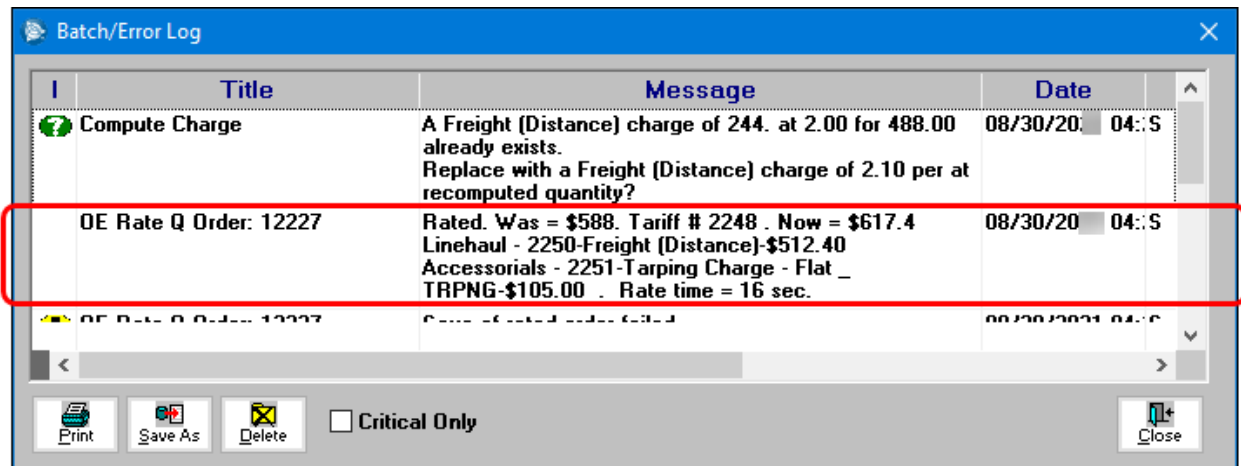
- Click **Yes** to cascade the date or **No** to update just the first order.
- Click **Process and Update**.
As the system processes the orders, one or more confirmation messages appear. They ask, "Are you sure you want to save this Master Order?"
- Select **Yes** in each message to continue with the update.



The system updates the dates on the master orders you edited, and rates or re-rates all the orders in the queue.

When the process is done, the Batch/Error Log is shown. The Message section shows this information for each line haul and accessorial charge:

- The previous total charge and the new total charge
- Rate ID
- Charge type ID



9. Click **Close** to close the Batch/Error Log window.
10. Click **Close** to close the queue.
11. When you close the displayed order, the system shows a message asking, "Do you wish to save your changes?" Click **Yes**.

