Eaco Schedule of Rates

USER GUIDE

Eaco

INDEX

INTRODUCTION

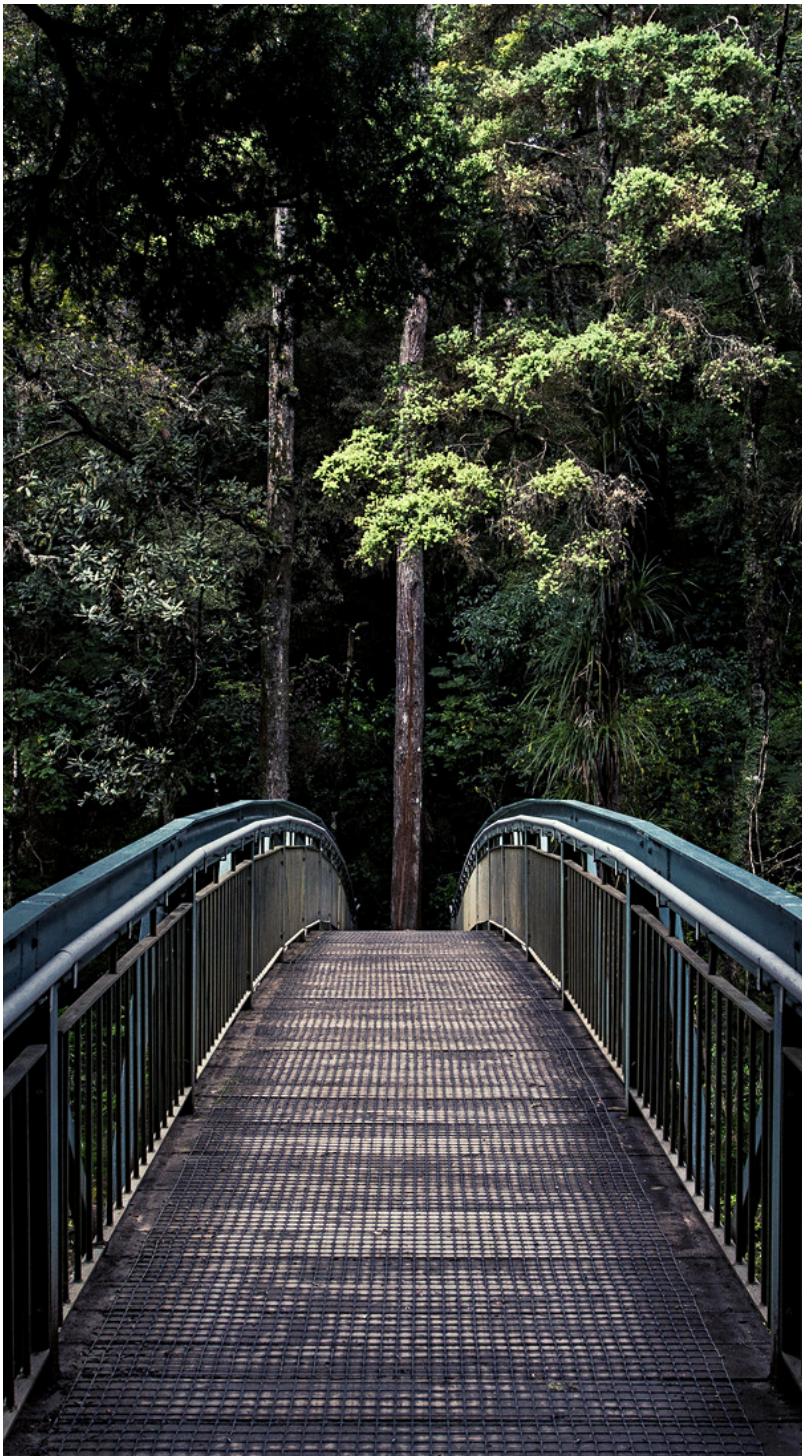*"What is a cynic? A man that knows the price of everything and the value of nothing" -* **Oscar Wilde**

Do you know that feeling of being overwhelmed? Until that point, you know you've done such a good job of juggling people, remembering things. Then there's that one little thing that slips your mind. That one piece that causes everything to start tumbling down like a house of cards.

This is where Eaco can step in - with solutions designed to keep your "house" secure - especially when it comes down to you getting paid. Eaco's Schedule of Rates functionality finally provides a bridge between all of that information in your head and the peace of mind that a critical cog in the wheel will never be left out again. Achieve this with the Schedule of Rates functionality that enables you to specify and lock down all of the buy and sell rates to automatically populate your quotes and invoices.

Using the "Buy Price" settings you can also configure the Eaco system to automatically create Supplier Invoices as well.
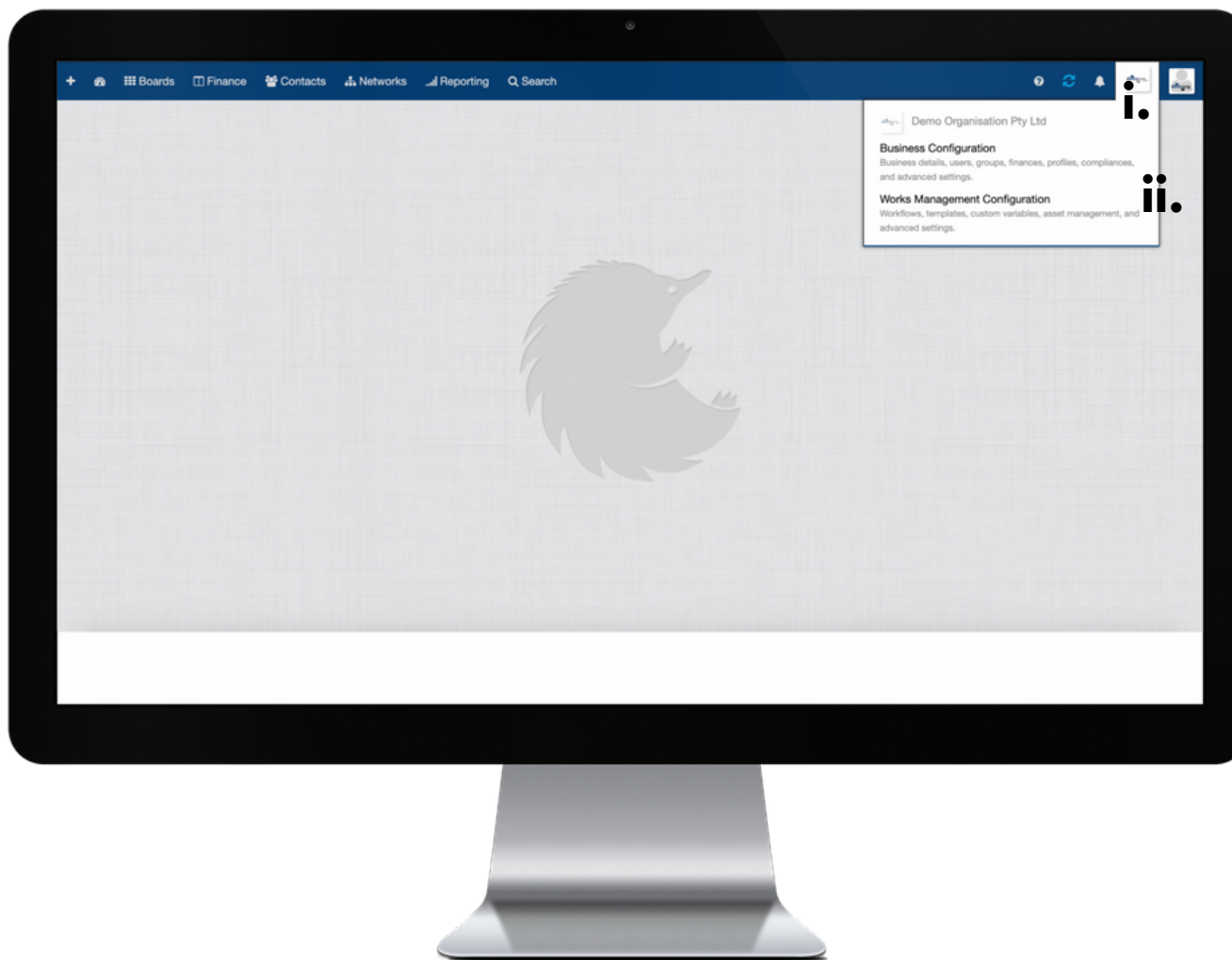
There can be no doubt that Eaco's Schedule of Rates functionality plays a core role in driving the efficiency and profitability of your business as it grows.
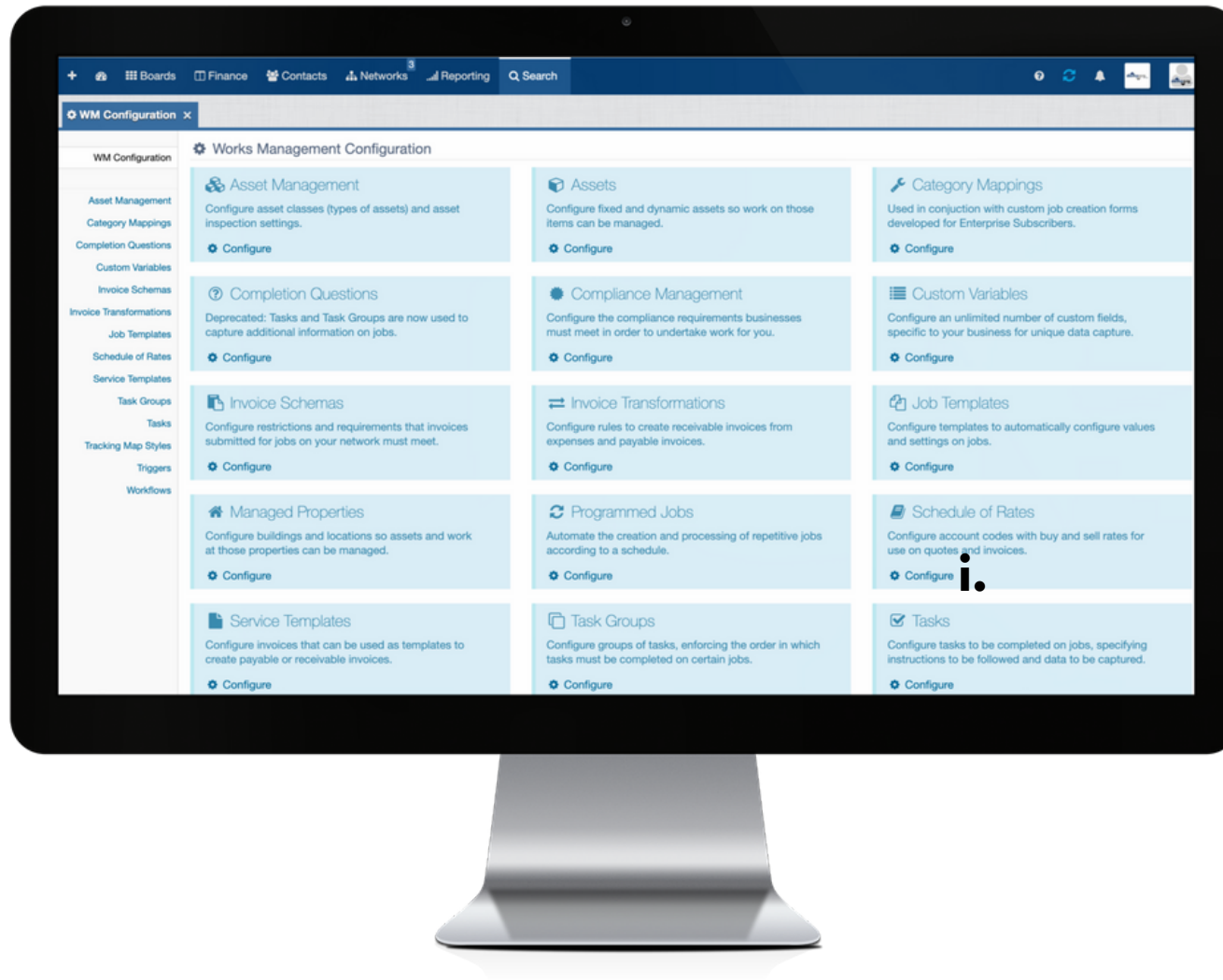
#ratesmadeeasy

Establish the settings for your Schedule of Rates feature via your organisation's Works Management Configuration (WM Configuration) section.

Your WM Configuration section can be found by clicking on the icon (i) for your Organisation's Profile and then selecting the Works Management Configuration from within the drop down menu (ii).
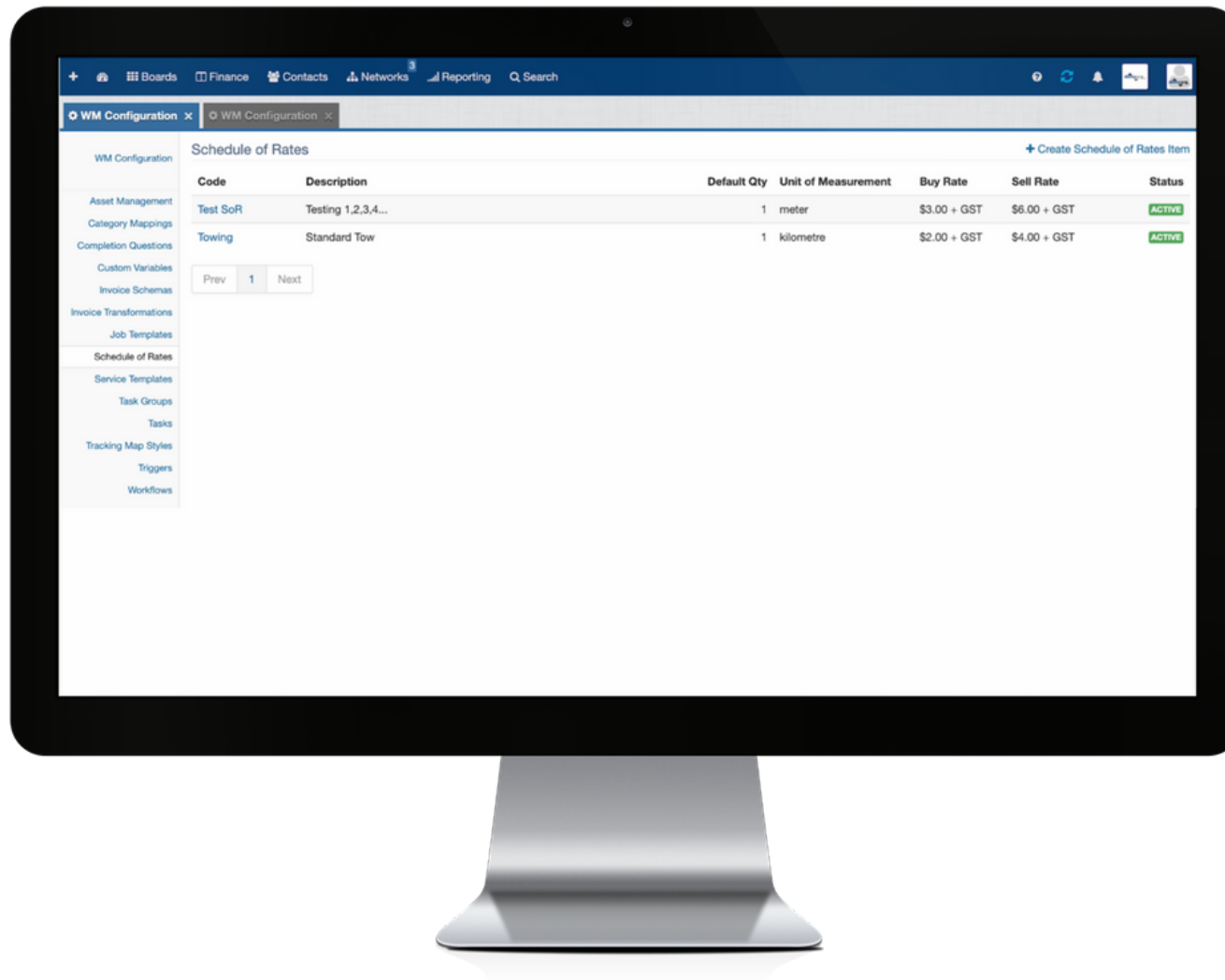
2. WM CONFIGURATION

i: To commence establishing the settings for your Schedule of Rates feature, click on Configure.

ESTABLISH, ACT, COMMUNICATE AND OPTIMISE

3. SETTINGS: MAIN VIEW

Configure settings to establish Buy and Sell rates for labour and material charges, which will provide consistency and easy use on quotes and invoices.

Legend: main view of Schedule of Rates settings page

Code: this is the Name of the Schedule of Rates Item.

Description: describes the labour or materials that the Schedule of Rates Item relates to.

Default Qty: represents the default quantity that will apply when the Schedule of Rate Item is applied on a quote and/or invoice.

Unit of Measurement: represents the unit of measurement that will apply when the Schedule of Rate Item is applied on a quote and/or invoice.

Buy Rate: represents the Buy Rate that will apply when the Schedule of Rate Item is applied on a quote and/or invoice.

Sell Rate: represents the Sell Rate that will apply when the Schedule of Rate Item is applied on a quote and/or invoice.
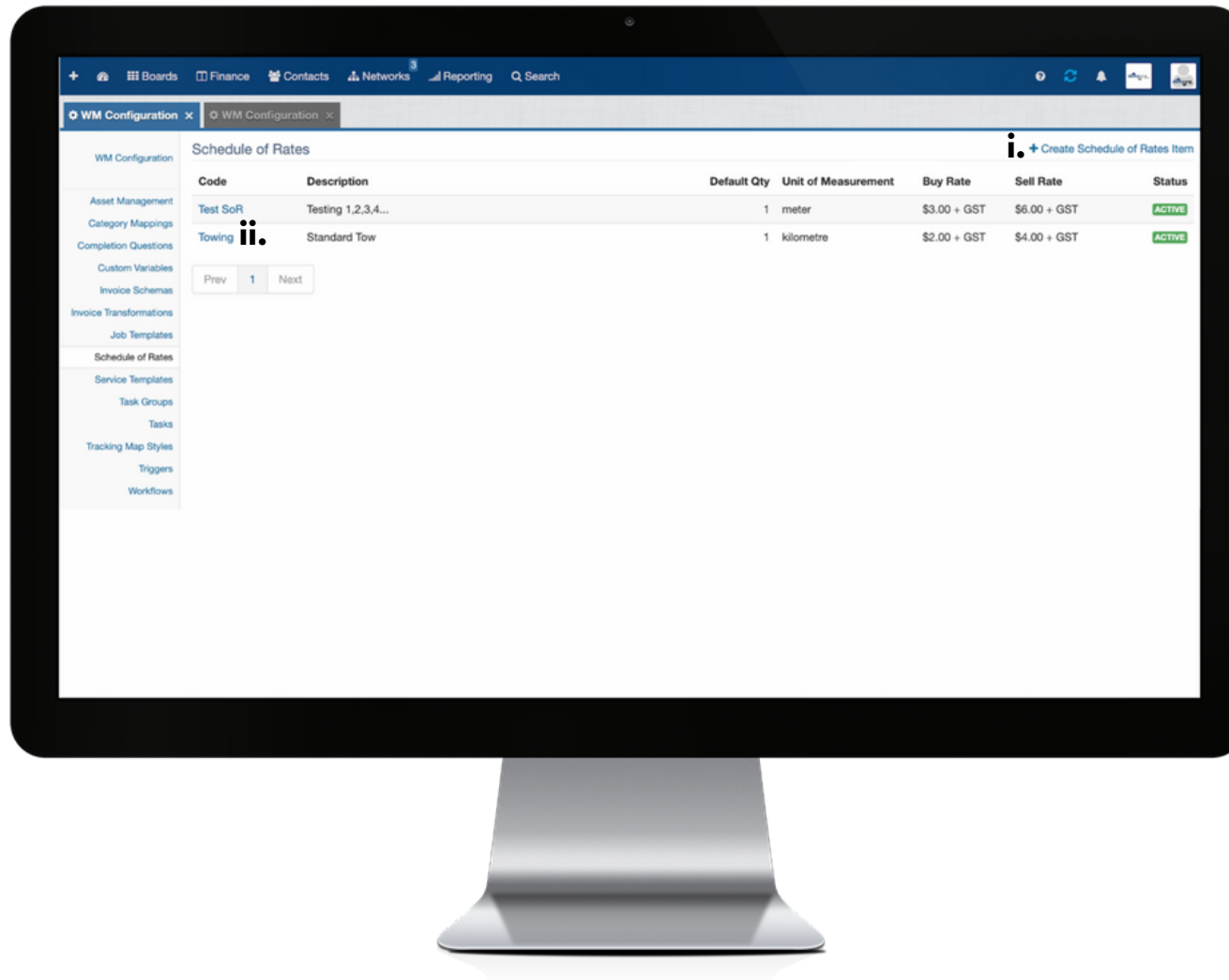
Status: If Active, this indicates that the Schedule of Rate Item is in use on quotes and/or invoices. If Inactive, this indicates that the Schedule of Rate Item is not in use on quotes and/or invoices.

4. CREATE A NEW/EDIT A SCHEDULE OF RATES ITEM

i: click + Create Schedule of Rates Item to open the Create a Schedule of Rates Item dialog box; or

ii: to edit the details of an existing Schedule of Rates Item, click the Code name to open the Create a Schedule of Rates Item dialog box.

Create a Schedule of Rates Item ✕

Account Code

i. [   ]

Line Item Description

ii. [   ]

Default Quantity

iii. [1]

Unit of Measurement (optional)

iv. [e.g. per metre]

Buy Rate (ex. tax)

v. [$] [0.00]

Sell Rate (ex. tax)

vi. [$] [0.00]

Settings

vii. ☑ GST applies to this item
Buy Rate and Sell Rate are to be entered as ex. GST regardless of this selection

viii. ☑ Providers can use this item to submit quotes/invoices to me
The Buy Rate will be used; providers will never see the Sell Rate

ix. ☑ Active
Inactive items cannot be added to quotes/invoices

[Cancel] [Create] **x.**

i: complete this field to apply an Account Code for the Schedule of Rates Item.

ii: complete this field to apply a Description.

iii: complete this field to register a Default Quantity.

iv: complete this field to apply (optional) a Unit of Measurement.

v: complete this field to set the Buy Rate.

vi: complete this filed to set the Sell Rate.

vii: check this box if GST is to be applied to this Item.

viii: check this box to enable Providers to use this Item to submit quotes/invoices to you (the Buy Rate will be used; Providers will never see the Sell Rate).

ix: check this box to enable or disable the use of this Item on quotes and/or invoices.

x: click Create to save all applied settings.