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## Customer Information Maintenance

The objective of this function is to allow customer service to update customer information. The message will prompt to operation immediately when operations encounter the customer. The customer code is created by corporate code controller. For how to create customer code, please refer to a separate file.

The screenshot shows the 'Outbound Quick Entry and Analysis' form. The 'Salesman and Customer Code' dropdown menu is open, and 'Customer/Vendor Subgroup Maintenance' is highlighted with a red circle. Other visible fields include Flight Date, Booking, Invoice, Action, Division, To, HAWB, MAWB, Job, POL, POD, Dest., User, Port/Country/Region Master, Salesman Master, Air Freight Master, Department Master, Miscellaneous, Nature Master, Dummy Code Replacement, and Operational Team.

## Customer / Vendor Subgroup

User can click to the record and find the basic customer information in the first screen. The screen is self explanatory, however, there are several points need to pay special attention.

The screenshot shows the 'Customer/Vendor Subgroup' form. The form displays various fields for customer information, including Group Name, Sub.Group, Name, Short Name, Country, Contact, Email, Fax 1, IATA Code, CASS, Air Import Contact, Air Export Contact, Sea Import Contact, and Sea Export Contact. The 'KC Code' field is highlighted in yellow. Other visible fields include Shipper, Liner Agent, Warehouse, Consignee, Agent, Other, Forwarder, Salesman, Zip, Web Site, Nature, Check Country, Air Export Contact, Contact, Title, Phone, Email, and Remark.

The only mandatory field are the highlighted in \*. Other fields are for reference.

In HKG, it is important to input **KC Code** in order to meet with the customs requirement.

Zip code is not a mandatory field but please be informed that under AMS and ENS requirement, the Zip Code are mandatory for the consignee address.

For MAWB printing, IATA Code and RA code are important too.

For China or other countries that they will use local accounting system for local tax purpose, the code UF Code will be for the accounting interface.

For Singapore, Thailand, Taiwan or other countries that they need to prepare GST Tax Invoice, the Tax Code of the customer is required.

Air Import, Air Export, Sea Import and Sea Export can have different contact point in the same customer.

Should there be documents you will send to the customer directly from FM3K, please input [+] and add the department and attention, email address.

The system will automatically call up this address book of the customer.

Customer/Vendor Subgroup				Division: SE				User: HKG LEO
Group Name				Shipper			Consignee	Agent
Sub.Group	B0043			Liner Agent			Other	Forwarder
Name	BK TEST 123			Warehouse			Salesman	CORP
Short Name	BKTEST	Old Code		State			Zip	
Country	PA	Port	PABLB	Web Site			Tax Code	
Contact		Phone		Nature			KC/AC Code	SCAC
Email				Check Country			UF Code	
Fax 1		Fax 2		Air Export Contact				
IATA Code		RA Code		Contact			Title	
CASS				Phone			Email	
Air Import Contact				Sea Export Contact				
Contact		Title		Contact			Title	
Phone		Email		Phone			Email	
Sea Import Contact				Remark				
Contact		Title						
Phone		Email						
CHG								
+ Dept * Attention Title Remark Telephone Fax Email Web Site								
1 Outbound OP001 操作部文件录入 2111 2111 gigiyueung@paradigm2000.com								

Send Email				User: LEO ACCOUNTS
Send				
From	calvinwong@paradigm2000.com			
To	gigiyueung@paradigm2000.com			
CC	Select Email - Google Chrome			
Subject	aswfm3k.paradigm2000.com/doc400b.asp?code=B0043&fld=emailto			
Attachment				
Body				
Select Email				
Division: SE User: HKG LEO				
Browse				
Recipient	B0043	Name	BK TEST 123	
Add				
Department	Attention	Email		
1 Outbound	OP001	gigiyueung@paradigm2000.com		

## Address

Address tag is where we store the address of a customer. You can see that the same address will be default for Company Name, Document Name, and Manifest Name.

English Company Name/Address		Local Mailing Name/Address	
Name	BK TEST 123	Local Name	
English Document Name/Address		Local Document Name/Address	
Name	BK TEST 123	Local Name	
English Manifest Name/Address		Local Manifest Name/Address	
Name	BK TEST 123	Local Name	
Notify Party Name/Address			
Name			

Company Name / Address is the name of the company and we store the official address.

Document Name / Address is the name we use in House Bill

Manifest Name / Address is the name we use in Manifest Printing

Notify Party Name / Address is reserve for other documents that customer need to display different Name / Address.

Please note that there are areas for Chinese Mailing Name / Address for local Chinese document printing.

## Background Info

This is where the customer service officer input the special instruction for operation so that they can serve the customer better. The Invoice Handling is reserved for Invoice printing if there is any special information user may want to print on the invoice.

Background Information						
Company Type	S C A L Sales Rep XX Bill Type					
(S-Shipper/C-Consignee/A-Agent/L-Liner Agent/O-Others/W-Warehouse/C-Coloader)						
Special Instructions						
Invoice Handling	(Y-Send Immediately N-Hold) Vol. Discount Code					
Special Instructions						
Air Export						
Air Import						
Sea Export						
Sea Import						
Remark						
<b>CHG</b>						
Type	File Name	Remark	Create Date	Fax	Email	Action

Special Instructions are divided by Department. If user press [CHG] – Change to input the information, when operation encounter this customer, there will be a special sign.

The following is the example. Customer service officer type in the instruction.

Customer/Vendor Subgroup ? [ ] [ X ]		Division: SE [ ] [ ] [ ] [ ]	
[ ] Browse [ ] Customer General [ ] Addresses [ ] Background Info [ ] Party and Ex.Rate [ ] Sales Rate [ ] Cost Rate [ ] P/O Caption [ ] Sale			
Group	A0177	Sub.Group	AO
Name	ABC TESTING COMPANY	Phone	
<b>Background Information</b>			
Company Type	Sales Rep*	CORP	Bill Type
(S-Shipper/C-Consignee/A-Agent/L-Liner Agent/O-Others/W-Warehouse/C-Coloader)			
<b>China VAT</b>			
AR VAT Type			
AP VAT Type			
<b>Special Instructions</b>			
Invoice Handling	Y	(Y-Send Immediately N-Hold)	Vol. Discount Code 888
<b>Special Instructions</b>			
Air Export	Please do not send email to XXX.		
Air Import			
Sea Export	Please send email to shipper among arrival.		
Sea Import			
Remark			
Confirm Cancel <small>Hint Key: ESC-Cancel</small>			

When operation create the HAWB for this customer, the instruction will be highlighted and seen.

Air Freight	Inbound	Outbound	Miscellaneous	Report	Invoice	Tariff	Master	Sea-Air	Utility
<b>HAWB Preparation ? [ ] [ X ]</b>									
[ ] Browse [ ] HAWB [ ] Charge [ ] P/O [ ] Manifest [ ] File [ ] Truck [ ] Event Log									
HAWB#*	ABC123456	MAWB							
Shipper*	A0177	Coloader							
ABC TESTING COMPANY		Customer							
		<b>Operation Remark</b>							
		Please do not send email to XXX.							
Consignee	R0001	Shipper							
RIM LOGISTICS, LTD.		Salesman*	CORP						
200 GARY AVENUE, SUITE B,		Quotation (Shipper)							
ROSELLE, IL 60172		Special Instruction	Please do not send email						
Notify#1		Contact Information	Name						
SAME AS CONSIGNEE		Consignee							
		Salesman*	CORP						
		Quotation (Consignee)							

Same alert will be shown in Shipping Order entry for the sea freight.

<b>Shipping Order Entry ? [ ] [ X ]</b>		Division	
[ ] Browse [ ] S/O [ ] Marks and Container [ ] Charge [ ] P/O [ ] Manifest [ ] File [ ] Warehouse			
S/O#	HKGSBLB500097	B/L	ASHKG500097
Shipper*	A0177	Coloader	Name
ABC TESTING COMPANY		Customer	Name
		<b>Operation Remark</b>	Network
		Please send email to shipper among arrival.	
		Receipt	

## Party and Ex Rate

This function shall not be used for the initial set up. In fact, this function is reserved for accounting function.

If you have special fixed exchange rate and other customer, then you are able to input the information and so the system will be able to calculate the invoice as according to this profile.

Air Freight		Inbound		Outbound		Miscellaneous		Report		Invoice		Tariff		Master		Sea-Air		Utility					
Customer/Vendor Subgroup ? X															Division: AE					User: HKG			
Browse		Customer General		Addresses		Background Info		Party and Ex.Rate		Sales Rate		Cost Rate		P/O Caption		Sales Log		SOP File		SOP Rule		Credit Control	
Group		A0177										Sub.Group		A0177									
Name: ABC TESTING COMPANY																							
Party																							
+ Sub.Code		Name						Short Name						Type									
1 B0043		BK TEST 123						BKTEST						Bill To									
Exchange Rate																							
+ Currency												Rate											
1 USD												7.00											
Hot Key : F2-Add F2-Add																							

## P/O Caption

This is where it will integrate with the iPOM and the information can be shown on the manifest.

Air Freight		Inbound		Outbound		Miscellaneous		Report		Invoice		Tariff		Master		Sea-Air		Utility				
Customer/Vendor Subgroup ? X															Division: AE					User: HKG		
Browse		Customer General		Addresses		Background Info		Party and Ex.Rate		Sales Rate		Cost Rate		P/O Caption		Sales Log		SOP File				
Sub.Group*		A0177										Name		ABC TESTING COMPANY								
Phone																						
P/O Caption																						
Column 1		SKU#																				
Column 2		COLOR CODE																				
Column 3																						
Column 4																						
Column 5																						
Column 6																						
Column 7																						
Column 8																						
Column 9																						
Column 10																						
Confirm		Cancel																				
Hot Key : ESC-Cancel																						

Since different customer will have different products, the P/O caption is an area where user can type in the caption. For example, garment customer may type in PO No. / Style No. / Season Code as caption. Electronic customer may type in PO / Item No. and etc

The configuration can be done by IT after confirmation of the process.

## Credit Control

This is the function that is used by the accounts department where it will show the Credit Limit, the Usage, the sub ledger code. Shall there be special warning accounts want to alert Operation and Customer Service. They will type in the information.

Air Freight	Inbound	Outbound	Miscellaneous	Report	Invoice	Tariff	Master	Sea-Air	Utility
<b>Customer/Vendor Subgroup</b> ? [ ] [X]									
[Browse] [Customer General] [Addresses] [Background Info] [Party and Ex.Rate] [Sales Rate] [Cost Rate]									
Group	A0177								
Sub.Group	A0177								
Name	ABC TESTING COMPANY								
Phone									
Country	HK								
Port	HKHKG								
Credit Limit					Usage				
Payment Term	▼								
Accounts Receivable									
Accounts Payable									
Warning Operation	<input checked="" type="checkbox"/>								
Description	COD CUSTOMER. NO CASH NO BILL								
[Confirm] [Cancel] Hot Key: ESC-Cancel									

Operation can see the remark from Accounts too.

Air Freight	Inbound	Outbound	Miscellaneous	Report	Invoice	Tariff	Master	Sea
<b>HAWB Preparation</b> ? [ ] [X]								
[Browse] [HAWB] [Charge] [P/O] [Manifest] [File] [Truck] [Event Log]								
HAWB#*	ABC123456				MAWB			
Shipper*	A0177				Coloader			
ABC TESTING COMPANY				<b>Accounting Remark</b> COD CUSTOMER. NO CASH NO BILL.				
				<b>Operation Remark</b> Please do not send email to XXX.				
				Customer				
				Name				
				Shipper				
				Salesman*	COR			

## Air Marketing - Tariff

This shall be maintained by the Rate Department or Marketing Department for the Salesman.

## Sales Rate Master

This is where user can maintain the standard rate for ALL general customers.

The standard rate can be differentiated by routing, service, charge code, currency, coload or direct shipment and etc.

Only highlight \* are the mandatory field. Other fields are for differentiation.

The function consists of three tags. Local rate, Freight and Fuel & Security & Surcharge.

Please note that the information will be generated to Sales for Customer Invoice Processing.

Air Freight	Inbound	Outbound	Miscellaneous	Report	Invoice	Tariff	Master	Sea-Air	Utility
<b>Sales Rate Master</b> ? [ ] [X]									User: HKG LEO
Carrier	From Port		To Port		To Region	Charge			
FRT.Term	FOB.Term		Transaction		Record				
[Local Rate] [Freight] [Fuel & Security & Surcharge]									
<b>Criteria</b>									
	Carrier	From Port	To Port	FRT.Term	FOB.Term	Commodity	ULD	Coload	Direct
				▼	▼		▼		<input type="checkbox"/>
<b>Charge*</b>	Base	Cur	Min/Flat	N	Q	Effective	Expiry	Control	Default
						31/12/2015		<input checked="" type="checkbox"/>	<input type="checkbox"/>
	KGS	HKD							
[Checkmark] [Refresh]									

## Local Rate

Local rate is where it maintains all local charges. If the charge is applied in all case, user can leave every filtering field blank and just select the charge and input the rate.

All other fields are for filtering and differentiation purpose.

Sales Rate Master														Division: AE		User: HKG LEO			
Carrier	From Port	To Port	FRT.Term	FOB.Term	Commodity	ULD	Coload	Direct	Charge	Base	Cur	Min/Flat	N	Q	Effective	Expiry	Control	Default	Show
1	HKG							<input type="checkbox"/>	ADC	KGS	HKD	15.000	0.000	0.000	01/01/2015		O	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2								<input type="checkbox"/>	TC	KGS	HKD	60.000	1.720	0.000	01/01/2015		O	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3	HKG							<input type="checkbox"/>	CTG	KGS	HKD	400.000	1.000	0.000	01/01/2015		O	<input checked="" type="checkbox"/>	<input type="checkbox"/>
4	HKG							<input type="checkbox"/>	AMS	JOB	HKD	100.000	0.000	0.000	17/12/2015		O	<input checked="" type="checkbox"/>	<input type="checkbox"/>
5	CX							<input type="checkbox"/>	TC	KGS	HKD	45.000	0.000	1.680	16/12/2015		O	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Press [+] and user can see the input fields.

Sales Rate Master														Division: AE		User: HKG LEO			
Carrier	From Port	To Port	FRT.Term	FOB.Term	Commodity	ULD	Coload	Direct	Charge	Base	Cur	Min/Flat	N	Q	Effective	Expiry	Control	Default	Show
								<input type="checkbox"/>	Charge*										
								<input type="checkbox"/>	Base										
								<input type="checkbox"/>	Cur										
								<input type="checkbox"/>	Min/Flat										
								<input type="checkbox"/>	N										
								<input type="checkbox"/>	Q										
								<input type="checkbox"/>	Effective										
								<input type="checkbox"/>	Expiry										
								<input type="checkbox"/>	Control										
								<input type="checkbox"/>	Default										
								<input type="checkbox"/>	Show										

The caption highlight in red shall pay special attention.

Charge – need to select the charge code

Min/ Flat – referring to the Minimum amount or Flat Rate.

N – Is normal which is 45kgs >

Q – Is 45 kgs <

(However if you have other weight break, you can input it later)

Then in the front of each row, there is a [+] and you can input the [+] and input the weight break you want and the rate you want.

Sales Rate Master														Division: AE		User: HKG LEO			
Carrier	From Port	To Port	FRT.Term	FOB.Term	Commodity	ULD	Coload	Direct	Charge	Base	Cur	Min/Flat	N	Q	Effective	Expiry	Control	Default	Show
3	HKG							<input type="checkbox"/>	CTG	KGS	HKD	400.000	1.000	0.000	01/01/2015		O	<input checked="" type="checkbox"/>	<input type="checkbox"/>
								<input type="checkbox"/>	Weight Break										
								<input type="checkbox"/>	Rate										
								<input type="checkbox"/>	UOM										

Effective and Expiry are the dates and it can be emptied.

Control – is the invoice control. If it is O – Online Invoice. (Each House with one invoice, B – Batch invoice, invoice by Job. M – Is Monthly invoice)

Default is the charge is default to be selected or not.

Show – means show on the house bill.

## Freight

This is referring to the standard charge for air freight rate. The input is the same as Local. Please note the currency have to be matched with the HAWB in order to generate the freight out.

The screenshot shows the 'Sales Rate Master' interface with the 'Criteria' tab selected. The 'Cur' field is highlighted with a red circle, and a dropdown menu is open showing various currencies: EUR, GBP, HKD, JPY, MYR, NTD, RMB, SGD, THB, and USD. The 'FRT' field is also highlighted with a red circle. The 'Effective' date is set to 31/12/2015.

## Fuel & Security Surcharge

This is referring to the fuel and security charge. Please note that the input screen is a little bit different. User can use the Region code to differentiate the rate.

The screenshot shows the 'Sales Rate Master' interface with the 'Criteria' tab selected. The 'Cur' field is set to HKD. A dropdown menu is open showing a list of regions: AF (AFRICA), AS (ASIA), AU (AUSTRALIA), CA (CANADA), EU (EUROPE), JP (JAPAN), NZ (NEW ZEALAND), PC (PACIFIC ISLANDS), SA (SOUTH & CENTRAL AMER), SEA (SOUTH EAST ASIA), and US (U.S.A.).

## Cost Rate Master

Cost Rate Master consists of three tags. The Local Rate, IATA and Fuel & Security.

Please note that the information will be generating to the Purchase for Vendor Invoice.

The screenshot shows the 'Cost Rate Master' interface with a list of cost rate entries. The table has the following columns: Carrier, Agent, From Port, To Port, FRT Term, FOB Term, Commodity, ULD, Coload, Direct, Cur, Base, WT, Charge, Min/Flat, N, Q, Effective, Expiry, Control, Default, Show, IATA, and C. The data rows are as follows:

Carrier	Agent	From Port	To Port	FRT Term	FOB Term	Commodity	ULD	Coload	Direct	Cur	Base	WT	Charge	Min/Flat	N	Q	Effective	Expiry	Control	Default	Show	IATA	C
1	HKG			PP						HKD	SET	ADC	13.000	0.000	0.000	01/01/2015						I	C
2	HKG			PP		BULK				HKD	KGS	G TC	40.000	1.477	0.000	01/01/2015						I	C
3	HKG			PP						HKD	SHF	HC	283.000	0.000	0.000	21/12/2015						I	C
4	HKG			PP						HKD	KGS	CFS	0.700	0.000	0.000	21/12/2015						I	C
5	CX	HKG		PP						HKD	KGS	TC	60.000	1.680	0.000	22/12/2015						I	C
6	KA	HKG		PP						HKD	KGS	TC	60.000	1.680	0.000	22/12/2015						I	C
7	HKG					PPK				HKD	KGS	G TC	40.000	1.311	0.000	23/11/2015						I	C



Hot Key : F7-Add Header F8-Change Header F2-Add

## Input Quotation

Please press [+] to input the quotation.

User can input the quotation number manually or leave it blank for auto generate the quotation number.

User can press F8 to select the customer. The system will bring along its Salesman.

User can then select the service type.

Hot Key : ESC-Cancel

Apply Standard Rate is a flag so that it will show the message apply standard rate in the quotation print out.

Freight / Local / Destination can leave blank or user can input the defined payer.

Effective From is default from the creation date.

Default Quotation is tick if it should be default when OP create the booking.

After press [Confirm] you can see the screen as below.

If the quotation number is blank previously, it will have a number assigned.

Hot Key : F7-Add Header F8-Change Header F2-Add

Please note that you can press [+] to input the information. The field with \* is mandatory. The system will default the customer as the payer and user can select the charge. If it is a freight charge, please input POL and POD.

**Sales Quotation** ? ☰ ✕ Division: **AE**

Quotation#	QHKGA00002	Freight	
Customer*	A0010 A. HARTRODT (GMBH & CO) KG FRANKFURT/M.	Local	
Attention		Destination	
Salesman*	CORP CORP	Effective From	16/12/2015
Service Type		Default Quotation	
Apply Standard Rate	<input checked="" type="checkbox"/>	Remark	

Criteria											
Carrier	From Port	To Port	Term	Commodity	Coload	Direct	Payor	Charge *	Base *	WT	Cur *
<b>Payor</b>	<b>Charge*</b>	<b>Base*</b>	<b>WT</b>   <b>G - Gross Weight</b> <b>C - Chargeable Weight</b> <b>Blank - Default</b>	<b>Cur*</b>	<b>Min/Flat</b>	<b>N</b>	<b>Q</b>	<b>Control</b>	<b>Default</b>	<b>Show</b>	
A0010				HKD				0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
<b>Code</b>	<b>Description</b>		<b>Base</b>								
ADC	AIRLINE DOCUMENTATION FEE		SET								
AGE	COLLECT A.D. AMOUNT		JOB								
AMF	AMENDMENT FEE		SET								
AMS	AMS FEE		SET								
AWB	AIR WAYBILL CHARGE		SET								
BBC	BREAK BULK CHARGE		SET								

Press tick after finish input and you can continue to add other charges for other traffic or charge items.

Quotation#	QHKGA00002	Freight	
Customer*	A0010 A. HARTRODT (GMBH & CO) KG FRANKFURT/M.	Local	
Attention		Destination	
Salesman*	CORP CORP	Effective From	16/12/2015 <b>To</b>
Service Type		Default Quotation	<input type="checkbox"/>
Apply Standard Rate	<input checked="" type="checkbox"/>	Remark	

Criteria												
Carrier	From Port	To Port	Term	Commodity	Coload	Direct	Payor	Charge *	Base *	WT	Cur *	Min/Flat
<b>Payor</b>	<b>Charge*</b>	<b>Base*</b>	<b>WT</b>   <b>G - Gross Weight</b> <b>C - Chargeable Weight</b> <b>Blank - Default</b>	<b>Cur*</b>	<b>Min/Flat</b>	<b>N</b>	<b>Q</b>	<b>Control</b>	<b>Default</b>	<b>Show</b>		
A0010	HC	SET		HKD	150			0	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
1								A0010	AWB	SET	HKD	150.000

If it is needed, you can print the quotation once finished.

Air Freight Inbound Outbound Miscellaneous Report Invoice Tariff Master Sea-Air Utility

**Sales Quotation** ? ☰ ✕ Division: **AE**

Quotation#	QHKGA00002	Freight		<b>Payor</b>	
Customer*	A0010 A. HARTRODT (GMBH & CO) KG FRANKFURT/M.	Local			
Attention		Destination			
Salesman*	CORP CORP	Effective From	16/12/2015	<b>To</b>	
Service Type		Default Quotation	<input type="checkbox"/>		
Apply Standard Rate	<input checked="" type="checkbox"/>	Remark			

Criteria															
Carrier	From Port	To Port	Term	Commodity	Coload	Direct	Payor	Charge *	Base *	WT	Cur *	Min/Flat	N	Q	Contr
<b>Local Charge</b>															
1							A0010	AWB	SET	HKD	150.000	0.000	0.000	0	
2							A0010	CIF	PCS	HKD	4.000	0.000	0.000	0	
3							A0010	HC	SET	HKD	150.000	0.000	0.000	0	

## Freight Cost Quotation

The function is where you need to input the contract with your vendor, the airliner or the coloader.

The process is the same as Sales Quotation. However, this is for reference search only.

At the moment, the system will not use this cost quotation.

Air Freight	Inbound	Outbound	Miscellaneous	Report	Invoice	Tariff	Master	Sea-Air	Utility							
<b>Freight Cost Quotation</b> <span>?</span> <span>☰</span> <span>✕</span>																
Division: <b>AE</b>								User: <b>HKG LEO</b>								
Browse   Detail																
							<b>Payor</b>		<b>Term</b>							
Quotation#	C15120001			Freight												
Vendor*	E0029 EMIRATES AIRLINE			Local												
Service Type	AE			Destination												
Apply Standard Rate	<input checked="" type="checkbox"/>			Effective From		01/01/2015		To								
Less %	0.00			Default Quotation		<input type="checkbox"/>										
					Remark											
ADD   CHG   DEL   Upload																
<b>Criteria</b>																
+	Carrier	From Port	To Port	Term	Commodity	Coload	Direct	Cur *	Base *	WT	Payor *	Charge *	Min/Flat	N	Q	ULD
■	1 EK	HKG	MAN	PP			<input type="checkbox"/>	HKD	KGS		E0029	FRT	0.000	10.000	0.000	0.000

Hot Key : F7-Add Header F8-Change Header F2-Add

## Sea Marketing - Tariff

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### Sales Rate Master

---

This is where user can maintain the standard rate for ALL general customers.

The standard rate can be differentiated by liner, routing, freight terms, charge code, or service and etc.

Only highlight \* are the mandatory field. Other fields are for differentiation.

The function consists of four tags. Local rate, Freight, Surcharge and Others.

The charges will be generated to Sales for Customer Invoice Processing.

### Local rate

---

Charge is the mandatory field, if the rate is 0 in the setting, the charges could not be generated out.

Criteria in purple columns are the criteria of specific HBL to get the charges.

Min/ Flat refer to min charge for CFS shipment; and also for those charges charged per SET/JOB/ SHP, please input in Min/ Flat column.

Sales Rate Master (This is UAT environment)

Freight Term: Charge

From Country / POL: Liner

To Country / POD: Region

Local Rate: Freight Surcharge Others

Outdate rate

Liner	From Port	To Port	To Region	FRT-Term	FOB-Term	Commodity	Charge	Base	Cur	CFS			CY			Eff
										Min/Flat	CBM	Type	20'	40'	40'HQ	
1						CC	BLF	SET	HKD	500.00	0.00		0.00	0.00	0.00	0.0001
2						PP	HC	JOB	HKD	400.00	0.00		0.00	0.00	0.00	0.0001
3			ASIA			PP	CFS	W/M	HKD	165.00	165.00		0.00	0.00	0.00	0.0001
4							CFS	W/M	HKD	198.00	198.00		0.00	0.00	0.00	0.0001
5						CC	TRU	W/M	USD	85.00	11.00		0.00	0.00	0.00	0.0001
6							DOC	SET	HKD	500.00	0.00		0.00	0.00	0.00	0.0001
7	APL	HKHKG	MXCJS				HC	JOB	HKD	250.00	0.00		0.00	0.00	0.00	0.0018
8		CNYTN	LATIN			PP	OTC	JOB	RMB	0.00	0.00		1,000.00	1,250.00	1,250.00	0.0001
9		HKHKG	LATIN			PP	SEL	CNTR	HKD	0.00	0.00		50.00	50.00	50.00	0.0020
10		CNYTN	LATIN			PP	SEL	CNTR	RMB	0.00	0.00		50.00	50.00	50.00	0.0001
11							SEL	CNTR	HKD	60.00	0.00		0.00	0.00	0.00	0.0001
12							AMS	SET	HKD	250.00	0.00		0.00	0.00	0.00	0.0001
13	APL	CNYTN					OTC	JOB	RMB	0.00	0.00		1,000.00	2,000.00	2,000.00	0.0001

Min/Flat: 50    CBM: 0    Type:    20': 0    40': 0    40'HQ: 0    45': 0    Effective: 1/1/2016    Expiry:    Control: 0

## Freight

Freight should be generated from sales quotation, instead of standard rate table, users are advised to set the freight from customer's sales quotation. Quotation input is in next session.

## Surcharge

This is referring to the charge codes mark with surcharge in charge code master. Please note that the input screen is a little bit different. User can use the Region code to differentiate the rate.

Sea Freight Inbound Outbound Miscellaneous Report Invoice Tariff Master Utility

Sales Rate Master (This is UAT environment)

Freight Term: Charge

From Country / POL: Liner

To Country / POD: Region

Local Rate: Freight Surcharge Others

Liner	Port	Region	Term	Charge	In %	Min/Flat	CBM	20'	40'	40'HQ	45'	Effective	Expiry	Control	
															1

Effective: 24/04/2017    Expiry:    Control: 0

Code Description

- BAF BUNKER ADJUSTMENT FACTOR
- CAF CAF CHARGE
- DCS DC SURCHARGE
- ERS EMERGENCY RISK SURCHARGE
- GRI GENERAL RATE INCREASE
- ISPS ISPS
- MYC FUEL SURCHARGE
- PSC PORT SECURITY CHARGE
- PSS PEAK SEASON SURCHARGE
- SUE SUEZ CANAL T/S SURCHARGE
- YAS YAS

## Others

Charge code marked as 'Late come' in charge code master are grouped to Others Charges in standard rate table.

Analysis Corporate Functions General Ledger Master Synchronization Utility

Charge Code Master (This is UAT environment)

Code: PFF

Charge Type: S

Charge Base: W/M

Documentation: PFF

Short Description:

Refer to:

Remark:

Simplified Chinese Description: 配货费

Traditional Chinese Description: 配货费

Tax Type: (V - VAT or GST / E - Exemption)

Report Group:

ADD    CNG

Sea Freight Inbound Outbound Miscellaneous Report Invoice Tariff Master Utility

Sales Rate Master (This is UAT environment)

Freight Term Charge Liner  
 From Country / POL Region Type  
 To Country / POD

Local Rate Freight Surcharge Others

Criteria CFS CY

Line	From Port	To Port	To Region	FRI.Term	FOB.Term	Commodity	Charge	Base	Cur	Min/Flat	CBM	Type	20'	40'	40'HQ	45'	Effective	
Min/Flat	CBM	Type	20'	40'	40'HQ	45'	Code	Description	Base									
							PFF		W/M									

## Cost Rate Master

Cost Rate Master consists of three tags. The Local Rate, Freight and Surcharge. Please note that the information will be generating to the Purchase for Vendor Invoice.

## Local Rate

The local rate is referring to the local cost.

Basically, the input method is the same as the Sales Local Rate. Purple column refer to criteria, charges could be differentiated by liner, liner agent, port, region and service.

Sea Freight Inbound Outbound Miscellaneous Report Invoice Tariff Master Utility

Cost Rate Master (This is UAT environment)

From Country / POL Commodity Liner Line Agent  
 To Country / POD Region Charge Type

Local Rate Freight Surcharge

Outdate rate

Criteria CFS CY

Line	L.Agent	From Port	To Port	To Region	Term	Charge	Base	Cur	Min/Flat	CBM	Type	20'	40'	40'HQ	45'	Effective	Expiry	Control
Min/Flat	CBM	Type	20'	40'	40'HQ	45'	Effective	Expiry	Control									
400	0						1/1/2015		B									

## Freight

This is referring to freight cost generate in Sub job -> Sample Ocean B/L -> Charge

Sea Freight Inbound Outbound Miscellaneous Report Invoice Tariff Master Utility

Cost Rate Master (This is UAT environment)

From Country / POL Commodity Liner Line Agent  
 To Country / POD Region Charge Type

Local Rate Freight Surcharge

Outdate rate

Criteria CFS CY

From	To	Liner	L.Agent	Commodity	Charge	Inv.Group	Cur	BAF	CAF	Min/Flat	CBM	Type	20'	40'	40'HQ	45'	Effective	Expiry	Control
1	HKHKG	DOSDQ	HLL	M0041	OFRF	HC	USD			0.00	0.00		500.00	600.00	600.00	600.00	01/01/2015		0
2	HKHKG	ATAHZ	ANL	H0023	OFRF		USD			0.00	111.00		600.00	800.00	850.00	900.00	01/01/2016		0
	HKHKG	SGSIN	MSK	M0041	OFRL		USD												
Min/Flat	CBM	Type	20'	40'	40'HQ	45'	Effective	Expiry	Control										
0	100		1000	2000	2000		1/1/2016		0										0

## Surcharge

This the table to maintain surcharge marked in Charge code master. Normally the surcharge could be set by liner, 'From' and 'To Port and region as well.

Code	Documentation	Type	Simplified Chinese Desc.	Traditional Chinese Desc.	Tax Type	Report Group	Base
1BAF	BUNKER ADJUSTMENT FACTOR	6	燃油附加費	燃油附加費			TEU
2CAF	CAF CHARGE	6	市價附加費	貨幣調整附加費			TEU
3DGS	DG SURCHARGE	6	危險品附加費	危險品附加費			TEU
4ERS	EMERGENCY RISK SURCHARGE	6	應急風險附加費	緊急風險附加費			SET
5GRI	GENERAL RATE INCREASE	6	GRI	GRI			TEU
6ISPS	ISPS	6	港口保安費	港口保安費			CNTR
7MYC	FUEL SURCHARGE	6	燃油附加費	燃油附加費			KG
8PSC	PORT SECURITY CHARGE	6	安保費	商港安全費			JOB
9PSS	PEAK SEASON SURCHARGE	6	旺季附加費	旺季附加費			TEU
10SUE	SUEZ CANAL T/S SURCHARGE	6	蘇黎世運河轉運費	蘇黎世運河轉運費			TEU
11YAS	YAS	6	日幣升值附加費	日幣升值附加費			CNTR

Liner	Port	Region	Term	Cur	Charge	In %	Min/Flat	CBM	20'	40'	40'HQ	45'	Effective	Expiry	Control
1APL	HKHKG	CNTAO		HKD											

## Sales Quotation

Please press [+] to input the quotation.

User may type the customer name and filtering in auto complete list. The system will bring along its Salesman.

Apply Standard Rate is a flag so that it will show the message apply standard rate in the quotation print out.

Freight / Local / Destination can leave blank or user can input the defined payer.

Effective From is default from the creation date.

Default Quotation is tick if it should be default when OP create the booking.

Quotation#	Customer	Salesman	Apply Standard Rate	Freight	Local	Destination	Effective From	Default Quotation
	JANIC	JANICE TESTING COMPANY 2016					24/04/2017	

Quotation#	Customer	Salesman	Apply Standard Rate	Freight	Local	Destination	Effective From	Default Quotation
	J0013	JANICE TESTING COMPANY 2016	<input checked="" type="checkbox"/>				24/04/2017	<input checked="" type="checkbox"/>

After press [Confirm] you can see the screen as below.

Criteria		CFS										CY				
Local Charge	Payor	Charge *	Base *	Cur *	BAF	CAF	Min/Flat	CBM	20'	40'	40'HQ	45'	Control	P/S		
1	HKHKG	J0013	BOF	TEU	USD		100.00	0.00	150.00	200.00	250.00	250.00	0			
2		J0013	SEC	KG	USD		100.00	0.00	0.00	0.00	0.00	0.00	0			
3		J0013	COV	CNTR	USD		0.00	0.00	15.00	20.00	25.00	0.00	0			
4		J0013	ASWHF	CNTR	HKD		0.00	0.00	999.00	999.00	999.00	999.00	0			

Please note that you can press [+] to input the information. The field with \* is mandatory.

Press tick after finish input and you can continue to add other charges for other traffic or charge items.

Criteria		CFS										CY				
Local Charge	Payor	Charge *	Base *	Cur *	BAF	CAF	Min/Flat	CBM	20'	40'	40'HQ	45'	Control	P/S		
1	HKHKG	J0013	BOF	TEU	USD		100.00	0.00	150.00	200.00	250.00	250.00	0			
2		J0013	SEC	KG	USD		100.00	0.00	0.00	0.00	0.00	0.00	0			
3		J0013	COV	CNTR	USD		0.00	0.00	15.00	20.00	25.00	0.00	0			
4		J0013	ASWHF	CNTR	HKD		0.00	0.00	999.00	999.00	999.00	999.00	0			
5		A0177	CLF	JOB	HKD		111.00	0.00	0.00	0.00	0.00	0.00	0			
6		A0177	DDC	SET	HKD		121.00	0.00	0.00	0.00	0.00	0.00	0			
7		A0177	DOF	SET	HKD		131.00	0.00	0.00	0.00	0.00	0.00	0			

The system will default the customer as the payer and user can select the charge. If it is a freight charge, please input POL and POD.

Criteria		CFS										CY				
Local Charge	Payor	Charge *	Base *	Cur *	BAF	CAF	Min/Flat	CBM	20'	40'	40'HQ	45'	Control	P/S		
1	HKHKG	J0013	BOF	TEU	USD		100.00	0.00	150.00	200.00	250.00	250.00	0			
2		J0013	SEC	KG	USD		100.00	0.00	0.00	0.00	0.00	0.00	0			
3		J0013	COV	CNTR	USD		0.00	0.00	15.00	20.00	25.00	0.00	0			
4		J0013	ASWHF	CNTR	HKD		0.00	0.00	999.00	999.00	999.00	999.00	0			
5		A0177	CLF	JOB	HKD		111.00	0.00	0.00	0.00	0.00	0.00	0			
6		A0177	DDC	SET	HKD		121.00	0.00	0.00	0.00	0.00	0.00	0			
7		A0177	DOF	SET	HKD		131.00	0.00	0.00	0.00	0.00	0.00	0			
8		A0177	IDF	SET	HKD		50.00	0.00	50.00	70.00	90.00	100.00	0			