

How to Calculate Service Charge

Calculating service charges will create unposted, but saved invoices for customers that owe service charges. Below are the steps to calculate a service charge. Before you proceed with the following steps, make sure your system has complete [service charge setup](#).

1. Open the **Calculate Service Charges** screen from **Sales | Calculate Service Charges** menu.
2. Fill out the details on the screen.
 - a. **Customer.** Select the Customers you want the run the service charge. If left blank, this will calculate the service charge for all customers.
 - b. **Status Code.** Select the customer's status code. If left blank, this will calculate the service charge for all status codes.
 - c. **As Of Date.** Enter the date in this field. This will analyze and assess service charge fees as of this date. It will re-analyze service charges from the date the last time the process was ran until the as of date defined.
 - d. **Include Budget Customers.** Check this option if service charge for overdue customer budget will be calculated too.
 - e. **Include Paid Invoices:** When activated, this will include invoices that have already been paid before the Service Charge is processed. This is only applicable if calculation is By Invoice

Calculate Service Charges

PreviewProcessClose

Details

Customer

Status Code

As of Date

4/19/2024

Service Charge Date

4/19/2024

Service Charge Post Date

4/19/2024

Include Budget Customers

☒

Include Paid Invoices

☒

(Unavailable if calculation is By Customer Balance)

?🌐💡

Ready

Refresh

3. Click the **Process** button.

If you want to first view the list of Service Charge calculation per customer, click the **Preview** button. This will open the Service Charge Preview screen.

4. Click **Yes** on the confirmation message.

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Are you sure you want to Calculate Service Charge?

Yes

No

5. Once the calculation is completed, the system will show the **Service Charge Invoice** screen. This screen lists down all the generated service charge invoices.

Service Charge Invoice

New Forgive Refresh Close

Details

☒ Select All ☐ Clear All View Invoice Layout Filter Records (F3)

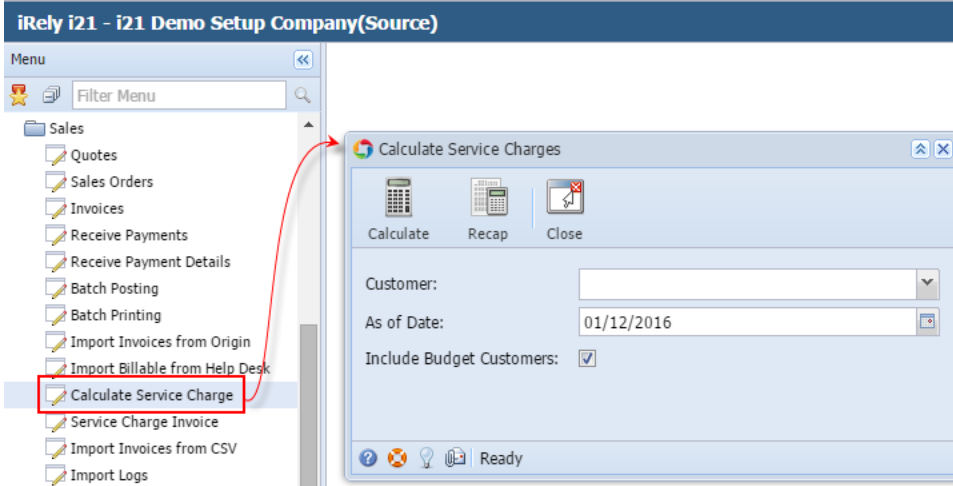
Service Charge Invoice Number	Date	Customer Name	Amount	Posted
<input type="checkbox"/> SC-1	3/18/2016	All U Need Kwik-Stop	4,128.22	<input checked="" type="checkbox"/>
<input type="checkbox"/> SC-3	5/16/2016	Brown Brother Farms	9.00	<input type="checkbox"/>
<input type="checkbox"/> SC-4	3/1/2016	BGD	83.89	<input type="checkbox"/>
<input type="checkbox"/> SC-10	2/28/2016	BGD	2.91	<input type="checkbox"/>
<input checked="" type="checkbox"/> SC-11	2/29/2016	ABC Reseller	14.29	<input type="checkbox"/>

Ready

To view the record, select the record and click the **View Invoice** button (see [How to View and Post Service Charge Invoice](#)).

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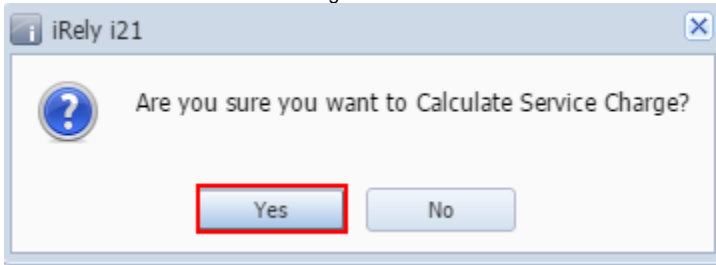
2. Fill out the details on the screen.
 - a. **Customer.** Select the Customers you want the run the service charge. If left blank, this will calculate the service charge for all customers.
 - b. **As Of Date.** Enter the date in this field. This will analyze and assess service charge fees as of this date. It will re-analyze service charges from the date the last time the process was ran until the as of date defined.
 - c. **Include Budget Customers.** *Not yet implemented.*

The screenshot shows the 'Calculate Service Charges' window with the following details filled in: 'Customer:' is set to '0001005066', 'As of Date:' is set to '12/31/2015', and 'Include Budget Customers:' is checked. The status bar at the bottom says 'Ready'.

3. Click the **Calculate** button.

 If you want to first view the list of Service Charge calculation per customer, click the **Recap** button. This will open the Service Charge Recap screen.

- Click **Yes** on the confirmation message.



- Once the calculation is complete, the system will show the **Service Charge Recap** screen. This screen lists down all the generated service charge invoices.

