Company
How to Add a New Charge

Where is New Charge Located?

- **Company > Start a Task > New Charge**

Why & When to Use New Charge

Use new charge to add monetary fees to any of the processes and procedures within Envio. Add a new charge when adding a new process or fee to your cost of doing business.

How to Add a New Charge

1. **Company > Start a Task > New Charge**
2. Click in the required yellow **Name** field to type the name of the charge. Be as descriptive as possible.
3. Click in the required Occurence Type field to select an area to assign the charge to.
4. Review the Checkbox selections for the criteria to assign to the charge. See Anatomy of a Charge for detailed information.
5. **Save** before moving to other tabs.
6. Choose either the **Rate** tab or **Step Rate** tab to create calculation logic for your fee.
   - See Understanding Step Rate Charges for a detailed explanation of Step Rates. If you are not using a Step Rate, select Rate.
7. On the selected Rate tab, click **New.**
8. In the new window, select a rate by clicking on a radio button.
9. Depending on your selection, an input field will display in the white area beside the radio buttons.
   - Refer to Anatomy of a Charge for reference
10. If using **Simple Amount** or **Rate X Basis**, continue on. If you are using a formula see the document **Charge Formulas** for further help.
11. For the **Simple Amount** type in a dollar value. Alternatively, for **Rate X Basis** select a **Rate** (dollar amount) and a **Basis** (what the dollar amount will apply to) and a **UOM** (Unit of Measure).
    - Example: A charge of $1.00 will apply to the Quantity Each.
12. Fill in the details that specify who and what the charge will pertain to. If left blank, it will pertain to every transaction of the chosen occurence type. Each available field is an opportunity to restrict what the charge affects.
13. **Save and Close** to save your work.
14. If you wish to have multiple options under one charge, continue to make new configurations. Each configuration will appear in the list.
15. Move the priority of the charges using the red arrows. Click to highlight a line, then click the directional arrow to change its priority in the list. Charges are allocated from the top of the list downward: the software looks for a match to its criteria starting with the top line and works its way down until it finds a match.
16. **Save and Close.**

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Note: There are 19* different processes where charges can be added.

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