

Creating Rate Cards

Last Modified on 03/02/2020 1:54 pm EST

1. Navigate to **Menu > Order Setup > Rate Cards**.
2. Click **New**, then enter the basic information for the rate card.

Note: Highlighted fields are required. For more details, read the [overview of rate cards](#).

The screenshot shows the 'Rate Cards' application window. The title bar reads 'Rate Cards' and the record number is 'Record: 3 of 3'. The main header displays 'Rate Card: Spring Tablet Sale' and 'WTS2020' with an 'ACTIVE' status indicator. Below the header is a 'Rate Card Details' section with tabs for 'General Info' and 'Description'. The 'General Info' section contains fields for 'Rate Type' (Discount %), 'Rate Value' (20.00%), 'VDS' (checked), 'Comm Type' (% of Act Margin), 'Comm Value' (3.00%), 'VCS' (checked), 'Start Date' (03/01/20), and 'End Date' (05/31/20). The 'Description' field contains the text 'March through May only, get 20% off of our student tablets!'. Below this is a 'Rate Card Items' table with columns for Line Item Code, Description, Customer Billing Code, Customer Item Desc, Default, Rate Type, Rate Value, VDS, Default, Comm Type, Comm Value, and VCS. Three items are listed: 'Tbtl-1 Student tablet, 7"', 'Tbtl-2 Student Tablet, 8"', and 'Tbtl-3 Student Tablet, 9"'. The 'Default' and 'VCS' columns for the first two items are circled in green. At the bottom of the form are 'Cancel' and 'Save' buttons.

3. Enter the rate card items by entering LICs one at a time or by clicking the **Search** icon () to add multiple.
Note: To customize the rate or commission details for an item, clear the **Default** flag and update the value.
4. Click **Save** and **Activate**.