# Super User Menu

Modified on: Tue, 1 Jun, 2021 at 1:14 PM
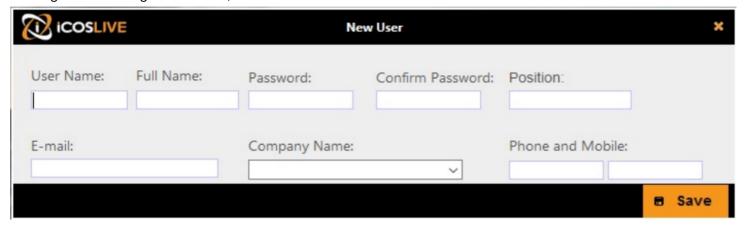
# Super User

The Super User screens allow you to manage users, companies, subcontractors, rates, places and areas
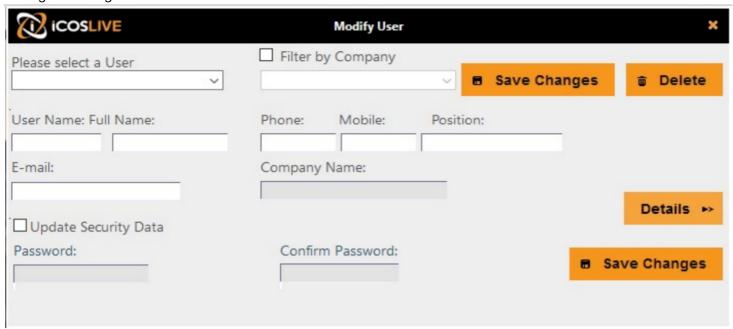


## Create User

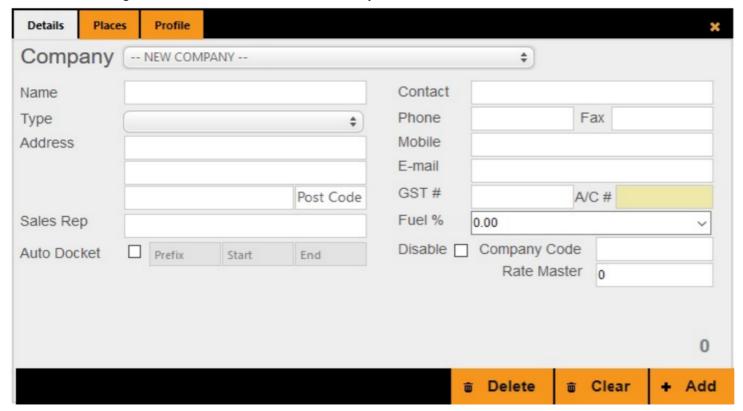A dialogue for creating new internal, client and subcontractor users



## Modify User Screen

Manages existing users



## Companies Screen

Creates and manages clients, subcontractors and Fuel Adjustment Factors



# Details Tab

The details tab contains information about a selected company and is also where you enter information for a new client

| Field | Description |
|---|---|
| Company | A drop down for selecting an existing client or can be used to create a new record by selecting the **--- NEW COMPANY ---** option. |
| Name | The client, subcontractor or FAF Group's name |
| Type | The record type (Client, Transport Contractor, FAF Group) |
| *Address | The mailing address for a client or subcontractor. |
| *Sales Rep | An optional field for recording your sales person for a client |
| Auto Docket | Autodocket settings |
| *Contact | Your main contact for a client or subcontractor |
| *Phone | The client or subcontractor's phone number |
| *Fax | The client or subcontractor's fax number |
| *Mobile | The client or subcontractor's mobile number |
| E-Mail | The client or subcontractor's email address |
| *GST# | The client of subcontractor's gst number |
| A/C# | Your financial system's code for a client or subcontractor (Required for accounts integration) |
| Fuel% | The FAF percentage or FAF Group for a client or subcontract |
| Disable | A check box for stopping a client from being able to have bookings created |
| *Company Code | *A free form field for recording your internal code or reference for a client |
| Rate Master | The company ID for another client from which a client will inherit rates from |
| Booking Memo | A text field for recording information about a client. This information is displayed on the Utilisation screen in the Booking Memo column |
| Stop Credit | A check box for identifying a client who has outstanding invoices and shouldn't have bookings made for them. Checking this check box will cause a red message to appear when ever any internal user creates a booking for them. |
| Booking Alert | A check box and free form text field for recording per client booking information. Checking this check box and entering text will cause a yellow message to appear when ever any internal user creates a booking for them. |
| | A * denotes that a field is for information purposes only and is not used anywhere else in the system. |
| | *Italicized* field names are optional |

| Button | Description |
|---|---|
| Delete | Deletes a company record and all of their bookings permanently |
| Clear | Clears any information entered into any of the details tab fields |
| Add | Adds a new company record |

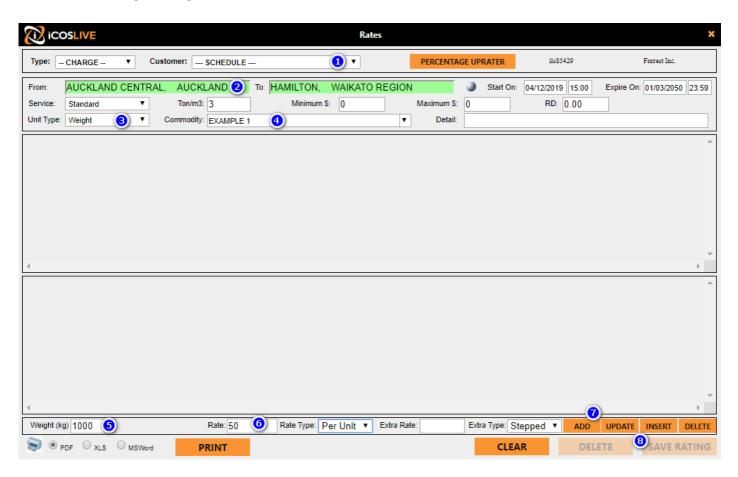| Save | Saves any updated information in a company record |
| --- | --- |

# Places Tab

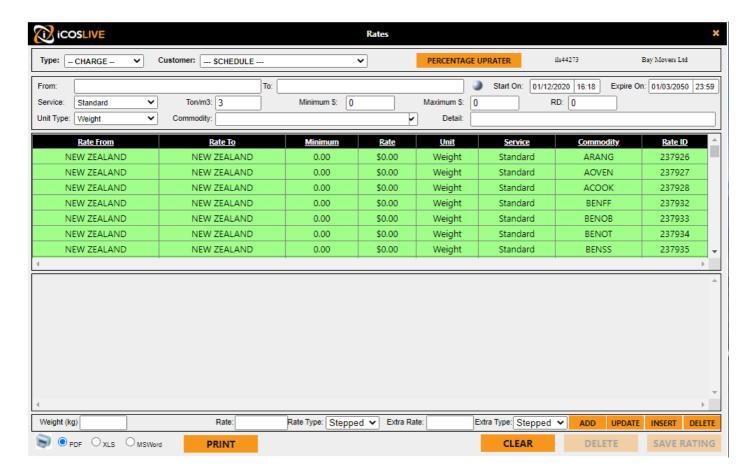to be completed

# Profile Tab

to be completed

# Rates Screen

Creates and manages charge and cost rates

# Adding a new rate (standard setup)

1. Select the Customer you want to add a rate to.
2. Set the **"From"** and **"To"** areas (As you start typing areas, preset options will populate for you to choose from).
3. Set **"Unit Type"** to the units you want to rate in e.g. Weight, Hour, Each etc.
4. Type in the **"Commodity"** , which helps identify the rate you wish to use when adding an item to a job.
5. Set the  Unit Type which is the **"Weight"** in this example, to specify the threshold of the break point.
6. Enter the **"Rate"** to set the charge figure for the rate.
7. Click the **"ADD"** button to add the new break point.
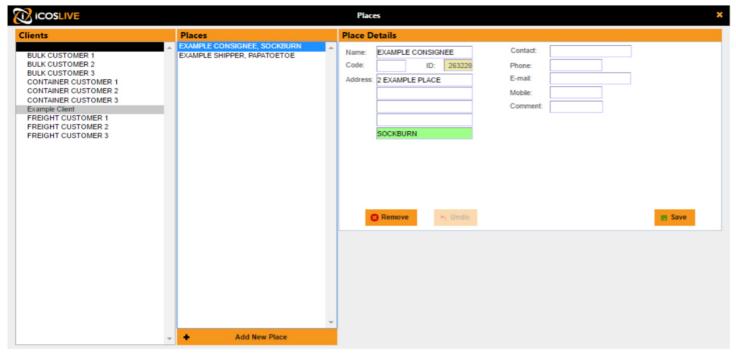8. Click the **"SAVE RATING"** button to save your Rate.

Printing Rate Schedules.



1. Select the rate schedule you wish to create a rate report on, by selecting a **Customer** from the rate schedule dropdown at the top.
2. Near the bottom left corner, select the type of file you wish to produce.
3. Click Print.

> ⚠ This menu contains financial information for your clients and your company. Access rights should be considered per internal user
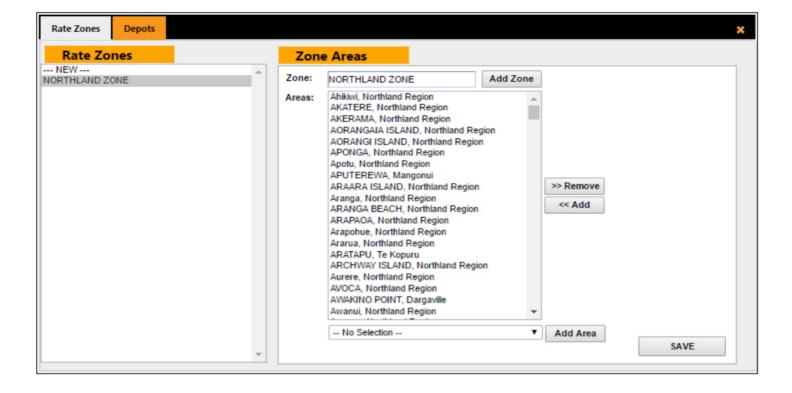
# Places

Creates and manages pickup and delivery sites



# Areas Screen

Creates and manages rate zones and depots, both of which can help to simplify rating and dispatching.

Preview