

## The Financial role and tasks (internal users only)

Modified on: Wed, 28 Nov, 2018 at 12:55 PM

The screenshot shows the 'User Details' form in the iCOSLIVE system. The form is divided into several sections: User Information, Roles, Tasks, and a right-hand sidebar. The 'User Information' section contains fields for User Name (TCDispatch), Full Name (Danny Dispatcher), e-mail (danny@testcompany.com), Position (Dispatcher), Company (ICOS FREIGHT TEST ACC), Phone (091231234), Mobile (0211231234), and Depots (No Selection). The 'Roles' section has checkboxes for Super User, Financials (checked), Vehicle Kms, Dispatch, and Reporting. The 'Tasks' section has a dropdown menu set to 'Financials', which is highlighted with a red box. This dropdown lists several tasks: Invoicing - Allow Invoicing, Invoicing - Allow Rerating, Invoicing - Allow Unverifying, Invoicing - Allow Verifying, Show Charge, Show Costs, Invoice Screen, and Rates Allow Editing. The right-hand sidebar contains a dropdown for '--- ALL ---' with options for STORAGE - HAMILTON and STORAGE - WELLINGTON, and buttons for Update, New User, and Modify User. There are also 'Update' buttons at the bottom of the Roles and Tasks sections.

**User Details**

User Name: TCDispatch Full Name: Danny Dispatcher e-mail: danny@testcompany.com Position: Dispatcher

Company: ICOS FREIGHT TEST ACC Phone: 091231234 Mobile: 0211231234 Depots: -- No Selection --

**Roles**

- ☐ Super User
- ☒ Financials
- ☐ Vehicle Kms
- ☐ Dispatch
- ☐ Reporting

**Tasks**

Financials

- ☐ Invoicing - Allow Invoicing
- ☐ Invoicing - Allow Rerating
- ☐ Invoicing - Allow Unverifying
- ☐ Invoicing - Allow Verifying
- ☐ Show Charge
- ☐ Show Costs
- ☐ Invoice Screen
- ☐ Rates Allow Editing

**Update**

**Update**

**Update**

**New User**

**Modify User**

### Invoicing - Allow Invoicing

The user can invoice jobs from **Financials > Invoice Screen / Invoiceable**

**iCOSLIVE** Super User | Financials | Vehicle Kms | Dispatch

Filter by Client: --- ALL --- Filter by Branch: --- ALL ---

Invoice Status: **Invoiceable** OrderRef: --- ALL ---

**Job Invoicing** Invoice Unverify

Select	Flags	Chg	Ovride	Verified	Status	Last Vehicle	Customer	Pickup
<input type="checkbox"/>								

## Invoicing - Allow Rerating

The user can retate jobs from **Financials > Invoice Screen / Unverified**

**iCOSLIVE** Super User | Financials | Vehicle Kms | Dispatch

Filter by Client: --- ALL --- Filter by Branch: --- ALL ---

Invoice Status: **Unverified** OrderRef: --- ALL ---

**Job Invoicing** Verify **Re-Rate**

Select	Flags	Chg	Ovride	Verified	Status	Last Vehicle	Customer	Pickup
<input type="checkbox"/>								

## Invoicing - Allow Unverifying

The user can unverify jobs from **Financials > Invoice Screen / Invoicable**

**iCOSLIVE** Super User | Financials | Vehicle Kms | Dispatch

Filter by Client: --- ALL --- Filter by Branch: --- ALL ---

Invoice Status: **Invoiceable** OrderRef: --- ALL ---

**Job Invoicing** Invoice **Unverify**

Select	Flags	Chg	Ovride	Verified	Status	Last Vehicle	Customer	Pickup
<input type="checkbox"/>								

## Invoicing - Allow Verifying

The user can verify jobs for invoicing from **Financials > Invoice Screen / Unverified**

The screenshot shows the iCOSLIVE Super User interface. The top navigation bar includes 'Financials', 'Vehicle Kms', and 'Dispatch'. Below this, there are filter options: 'Filter by Client' (set to '--- ALL ---'), 'Filter by Branch' (set to '--- ALL ---'), 'Invoice Status' (set to 'Unverified' and highlighted with a red box), and 'OrderRef' (set to '--- ALL ---'). The main section is titled 'Job Invoicing' and contains two buttons: 'Verify' (highlighted with a red box) and 'Re-Rate'. Below these buttons is a table with columns: 'Select', 'Flags', 'Chg', 'Ovride', 'Verified', 'Status', 'Last Vehicle', 'Customer', and 'Pickup'. The table is currently empty.

## Show Charge

The user can see booking charges.

## Show Costs

The user can see booking costs.

## Invoice Screen


The user can access the **Financials > Invoicing Screen**

The screenshot shows the iCOSLIVE Super User interface. The top navigation bar includes 'Financials', 'Vehicle Kms', and 'Dispatch'. Below this, there are two buttons: 'Invoice Screen' (highlighted with a red box) and 'Utilisation Screen'.

## Rates Allow Editing

User can edit rates in the **Super User > Rates** screen

**⚠ A user cannot access the rates screen without the *Super User* task *Edit Rates Screen***


Rates
✕

freightsuper
ICOS FREIGHT TEST ACCOUNT

Type: -- CHARGE -- Customer: BULK CUSTOMER 2 ++ 36857

From:  To:

Service: Standard Minimum \$:  RD:  Start On:

Unit Type: Weight Maximum \$:  Ton/m3:  Expire On:

Commodity:  Detail:

Rate From	Rate To	Minimum	Rate	Unit	Service	Commodity	Rate ID
TAURANGA	TAURANGA	0.00	-	Weight	Bulk	SUPER 10K	205273
TAURANGA	TAURANGA	0.00	-	Weight	Bulk	LIME FINES	205274
TAURANGA	TAURANGA	0.00	-	Weight	Bulk	TAPIOCA	205275
TAURANGA	TAURANGA	0.00	-	Weight	Bulk	PARM KERNAL	205276
TE PUKE	TAURANGA	0.00	-	Weight	Bulk	SUPER 10K	205265
TE PUKE	TAURANGA	0.00	-	Weight	Bulk	LIME FINES	205266
TE PUKE	TAURANGA	0.00	-	Weight	Bulk	TAPIOCA	205267
TE PUKE	TAURANGA	0.00	-	Weight	Bulk	PARM KERNAL	205268

Weight (kg)  Rate:  Rate Type: Stepped Extra Rate:  Extra Type: Stepped

ADD INSERT UPDATE DELETE

PDF XLS MSWord PRINT DELETE SAVE RATING

# Utilisation Screen

User can access the **Financials > Utilisation Screen**



Preview