

# How to change charge rates in TaBS

1.) In order to change charge rates, go to System Settings first.



1.) From there, Open Department settings and edit selected department to modify rates.

Name	Active Users	Legal Entity	Code	Abbr	Options
Accounting	0	BCOR	ACC	ACC	
Team A	10	CCOR	A	Team A	
Team B	10	ACOR	B	Team B	
Team C	11	BCOR	C	Team C	
Team D	11	BCOR	D	Team D	
Team E	1	CCOR	E	Team E	

3. Depending on how your system was set up, you might have only **standard rate** or **multiple rates**.

- + Users
- Organization
  - Departments
  - Legal Entities
  - Offices
  - Target
    - Valid Entry Date
- + Data Definition
- + Activities
- + Translations
- + Other
- + Processes
- + Business Job Process
- + People Assessment
- + Opportunities

## Team A

10 user(s) assigned to this department.

Abbr: Team A Timesheet required entry: 1 day(s)  
 Code: A  
 Legal Entity: CCOR  
 Office: Singapore

Level	Activity	Job Type	Manage Currency SGD		
Staff Level	Utilization	Expected Profit	standard	Active Users	
Assistant Manager	0	100	300.00	10	
Associate	0	100	100.00	0	
Director	0	100	700.00	0	
Executive Assistant	0	0	0.00	0	
Manager	0	100	400.00	0	
Senior Associate	0	100	180.00	0	
Senior Manager	0	100	500.00	0	
Senior Partner	0	100	900.00	0	

### 4. Make sure to adjust rates in all billing currencies.

- + Users
- Organization
  - Departments
  - Legal Entities
  - Offices
  - Target
    - Valid Entry Date
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Associate	0	100	100.00	0	
Director	0	100	700.00	0	
Executive Assistant	0	0	0.00	0	
Manager	0	100	400.00	0	
Senior Associate	0	100	180.00	0	
Senior Manager	0	100	500.00	0	
Senior Partner	0	100	900.00	0	

### Extra Tips

- 1.) This adjust does not affect previously added WIP.
- 2.) In terms of recalculate value of WIP.
- 2.1 Go to **Jobs** bookmark and under **Charge Rates** tab.

Dashboard Clients NonClients Opportunities **Jobs** Timesheets Expenses Employees myPerformance Billings Receipts Reports myPlanner Newsletter

> add job

**open** TES0027.01 Normal Job

TES0027 John & Catherine Limited

Recovery 0% Discount 0%

Partner: Site Administration Start Date: 2023-01-01  
 Manager: John Jones (M) Billing Frequency: Monthly  
 Job Type: Project/Installation Payment Terms: 0  
 Legal Entity: TES0027 Default VAT Rate: 0%  
 Department: IT/IT Support Invoice Delivery Method: email and print  
 Billable: yes Opened By: John Jones (M)  
 Suspend Time Entry: no  
 Fixed Fees: no  
 Currency: SGD  
 Discount: 0%  
 Job year: 2023  
 Office: Singapore

Summary Activities Timesheets Expenses Billings Receipts Documents Costs Analysis Budget **Charge Rate** myPlanner

+ add custom charge rate by Fee Earner

People	Charge Rate
<input type="text"/>	0.00 SGD

apply new charge rate to unbilled wip **save**

+ add custom charge rate by Staff Level

Level	Charge Rate
<input type="text"/>	0.00 SGD

apply new charge rate to unbilled wip **save**

2.2 Check tick box to apply new charge rate to unbilled wip. Then save.

**Tips:** The system needs to provide this permission to user account first to get this view.

+ add custom charge rate by Fee Earner

People	Charge Rate
<input type="text"/>	0.00 SGD

apply new charge rate to unbilled wip **save**