

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.

The screenshot shows the 'Departments' settings page. On the left is a sidebar with a tree view under 'Organization'. The 'Departments' item is selected and highlighted with a red box and a red circle with the number '1'. The main area displays a table of departments. The 'Accounting' department is highlighted with a red box and a red circle with the number '2'. The table has columns for Name, Active Users, Legal Entity, Code, Abbr, and Options.

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**.

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+ Users

Organization
Departments
Legal Entities
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Valid Entry Date

+ Data Definition
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+ Other
+ Processes
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+ People Assessment
+ Opportunities

Team A

10 user(s) assigned to this department.

Abbr: Team A
Code: A
Legal Entity: CCOR
Office: Singapore

Timesheet required entry: 1 day(s)

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**.

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Team A

10 user(s) assigned to this department.

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Timesheet required entry: 1 day(s)

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

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

Recovery 0% Discount 0%

Partner: [Name] Start Date: [Date]
 Manager: [Name] Billing Frequency: [Frequency]
 Job Type: [Type] Payment Terms: [Terms]
 Legal Entity: [Entity] Default VAT Rate: [Rate]
 Department: [Department] Invoice Delivery Method: [Method]
 Billable: [Yes/No] Opened By: [User]
 Suspend Time Entry: [Yes/No]
 Fixed Fees: [Amount]
 Currency: [Currency]
 Discount: [Percentage]
 Job year: [Year]
 Office: [Office]

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

+ add custom charge rate by Fee Earning

People	Charge Rate
[Dropdown]	0.00 SGD

☐ apply new charge rate to unbilled wip save

+ add custom charge rate by Staff Level

Level	Charge Rate
[Dropdown]	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 Earning

People	Charge Rate
[Dropdown]	0.00 SGD

☒ apply new charge rate to unbilled wip save