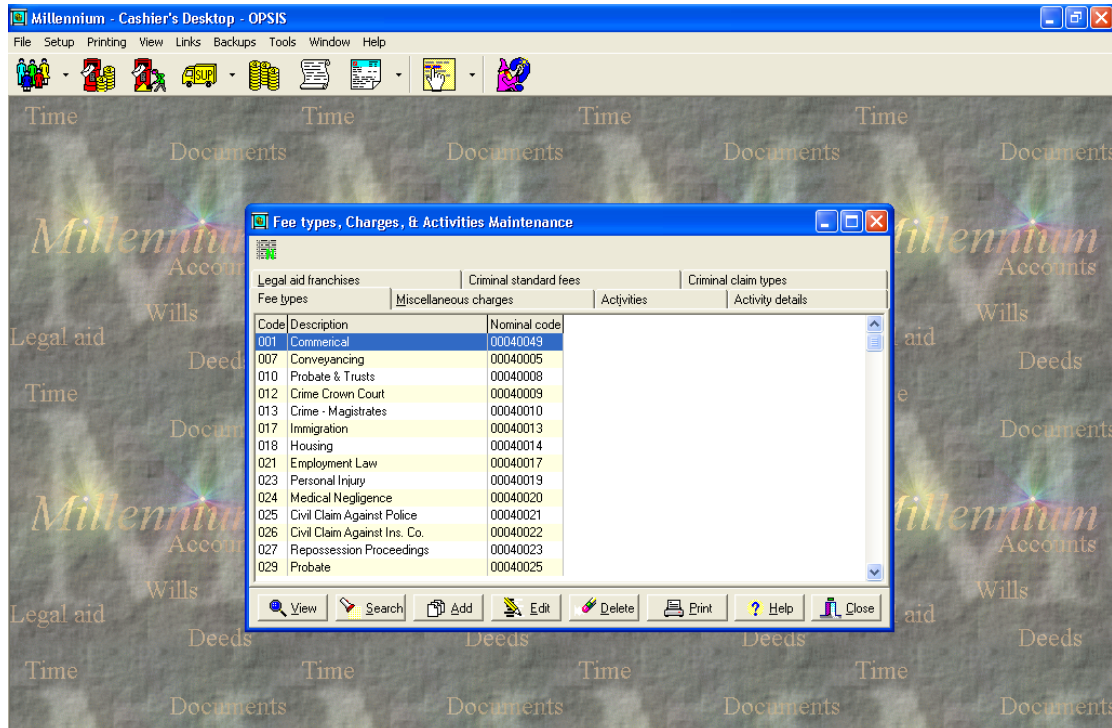


How to set up Fee Types

A fee type determines which nominal records the fees for a specified type of work.

Click on the **Setup** menu and select **Fee types, Charges, & Activities** to open the **Fee types, Charges, & Activities Maintenance** screen:



The **Fee types, Charges, & Activities Maintenance** screen contains a list of default Fee types.

Click on the **Add** button to add a fee type.

Click on the **Edit** button to change the details of an existing fee type. You will not be able to change the fee type code.

Click on the **Delete** button to remove a fee type record. If the fee type record is not used anywhere else on the system, it will be deleted from the list. If it is still stored but has no live matters, the status of the fee type will change to *Archived*. If the fee type has any live matters, deletion is not allowed.

To add a fee type record

To add a fee type record, click on the **Add** button:

Code is the unique 3 character code that identifies this fee type.

Status is the fee type's status. This is normally live but it will become *archived* if you try to delete a fee type that still has work in progress.

Nominal code is the nominal account that will be associated with this fee type. When creating a new fee type the associated nominal account will also be created. You can either type the reference number or use the **Chart of Accounts** button to select a chart of accounts item. If you select a chart of accounts item you will automatically be given the next available nominal account code in that chart of accounts item range.

Description is the description of this fee type.

A **Branch** should be selected if this account belongs to a branch.

A **Department** should be selected if this account belongs to a department.

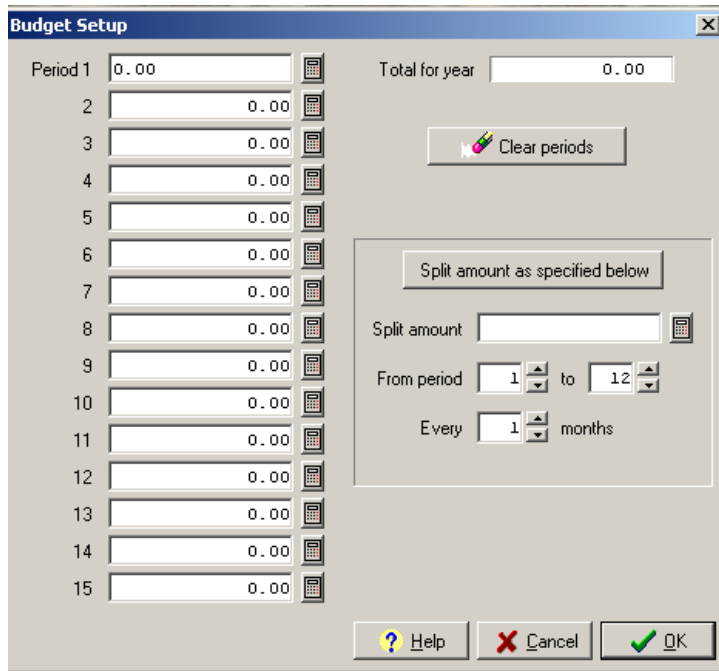
Access level is the security level of this account. Any user with a lower access level will not be able to access this account.

Clear down acc. is another nominal account that will be posted to when closing the financial year. When the year is closed the balance of this account will be transferred to the *clear down account* (such as Current profit).

Use the **Delivered budgets** and **Received budgets** buttons to set the budget figures for the amounts you expect to receive or pay out for this account in each financial period.

Setting fee type budgets

To set the budget figures for the fee type click on the **Delivered budget** or **Received budget** button.



The **Budget Setup** window allows you to view and set the budget figures for each of your financial periods. The budget amount for each of the 15 periods is shown together with a total for the year.

When editing the record the budgets can be set in each period by one of two ways:

1. Manually enter a budget amount in the box for each period.
2. Enter one amount and have it split automatically between the periods:
 - a. Enter a total in the **Split amount** box.
 - b. Set the **From period** and **to** period.
 - c. Set the frequency in the **Every x months** box.
 - d. Use the **Split amount as specified below** button to split the total and fill in the period amounts.

For example, to split an amount over 12 months use **From period 1 to 12** **Every 1 months**. To split an amount quarterly use **From period 1 to 12** **Every 3 months**.

- e. You can repeat this procedure again if you need to. For example, you might want to split an amount over the first 6 months and then a different amount over the last 6 months.

To clear all the period amounts click on the **Clear periods** button.