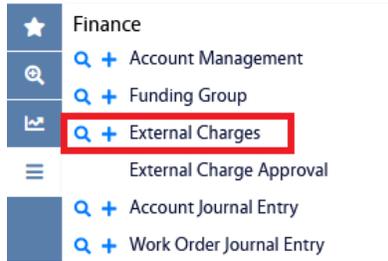


Create an External Charge

An External Charge is a generic way to create a charge on a Work Order Phase. The charge can be applied to any of the Subledgers and is just a flat amount. There are fields on the screen to allow the entry of other information that can be used to document the charge.

- From the menu, under **Finance**, select **External Charge**



- Click the External Charge hyperlink and then click:



- Alternatively, you can click **+** to go right to the External Charge entry screen.

A screenshot of the 'AiM External Charges' entry screen. The interface includes a top bar with 'Save' and 'Cancel' buttons. A left sidebar contains 'View', 'Notes Log', 'User Defined Fields', and 'Related Documents'. The main area is divided into several sections:

- Header:** '1012' (highlighted in yellow), 'Last Edited by DALLACE UNGER On 7/1/22 3:28 PM', and tabs for 'Posted' and 'Not Posted'.
- Form Fields:**
 - Work Order:** A search field (highlighted in red).
 - Phase:** A search field (highlighted in red).
 - Work Code:** A search field (highlighted in red).
 - Contractor:** A search field.
 - Address Code:** A search field.
 - Terms:** A search field.
 - Part:** A search field.
 - UOM:** A search field.
 - Quantity:** A numeric input field.
 - Shop:** A search field.
 - Shop Person:** A search field.
 - Employee:** A search field.
 - Subledger:** A dropdown menu with 'Material' selected (highlighted in red).
 - Total Amount:** A numeric input field (highlighted in red).
 - Currency:** A dropdown menu with 'USD' selected (highlighted in red).
 - Invoice Number:** A search field.
 - Invoice Date:** A date picker.
 - Subtotal:** A numeric input field (highlighted in red).
 - Discount:** A numeric input field.
 - Tax 1:** A numeric input field.
 - Tax 2:** A numeric input field.
 - Tax Rebate:** A numeric input field.
 - Markup:** A numeric input field.
 - Requisition:** A search field.
 - Cash Transaction:** A search field.
 - Batch:** A search field.
 - PO Code:** A search field.
 - Payment Date:** A date picker.

- Add the following required fields:

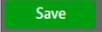
- Work Order**
- Phase**
- Work Code**
- Select the **Subledger** from the dropdown
- Subtotal**

4. Add the other fields as needed by your institutions guidelines.

The screenshot shows the 'AIM External Charges' form. At the top, there are 'Save' and 'Cancel' buttons. The form is divided into several sections:

- Header:** '1008' and 'Last Edited by MICHAEL KEELIN On 10/3/22 9:08 AM'. Status: 'Not Posted'.
- Left Sidebar:** 'View', 'Notes Log', 'User Defined Fields', 'Related Documents'.
- Main Form:**
 - Work Order:** W2000074 (highlighted in red)
 - Phase:** 001 (highlighted in red)
 - Work Code:** POWER OUTAGE (highlighted in red)
 - Contractor:** 000000137
 - Shop:** ELECTRICAL
 - Shop Person:** CENTRAL ELECTRICAL
 - Address Code:** NA
 - Terms:** MU
- Right Panel:**
 - Subledger:** Contract (highlighted in red)
 - Total Amount:** \$100.00
 - Totals:**
 - Subtotal: \$100.00 (highlighted in red)
 - Discount: \$0.00
 - Tax 1: \$0.00
 - Tax 2: \$0.00
 - Tax Rebate: \$0.00
 - Markup: \$0.00

5. Use the  to have the system recalculate the **Total Amount** field.

6. Click: 

Note: On initial entry the External Charge will be saved as Not Posted.
You cannot approve the External Charge from here.