Rate Schedule Quick Reference

Document Version VB1

A Rate Schedule is a pricing schedule agreed upon by your company and Husky Energy Inc. Rate Schedules are sent to you by Husky and will appear in your Cortex **Inbox**. When Husky sends you a Purchase Order that references a specific Rate Schedule, you should use that Rate Schedule to easily add Line Items to your Service Receipt.

NOTE	For any discrepancies with the content of a Rate Schedule, please contact your Husky representative.

Receiving Rate Schedules

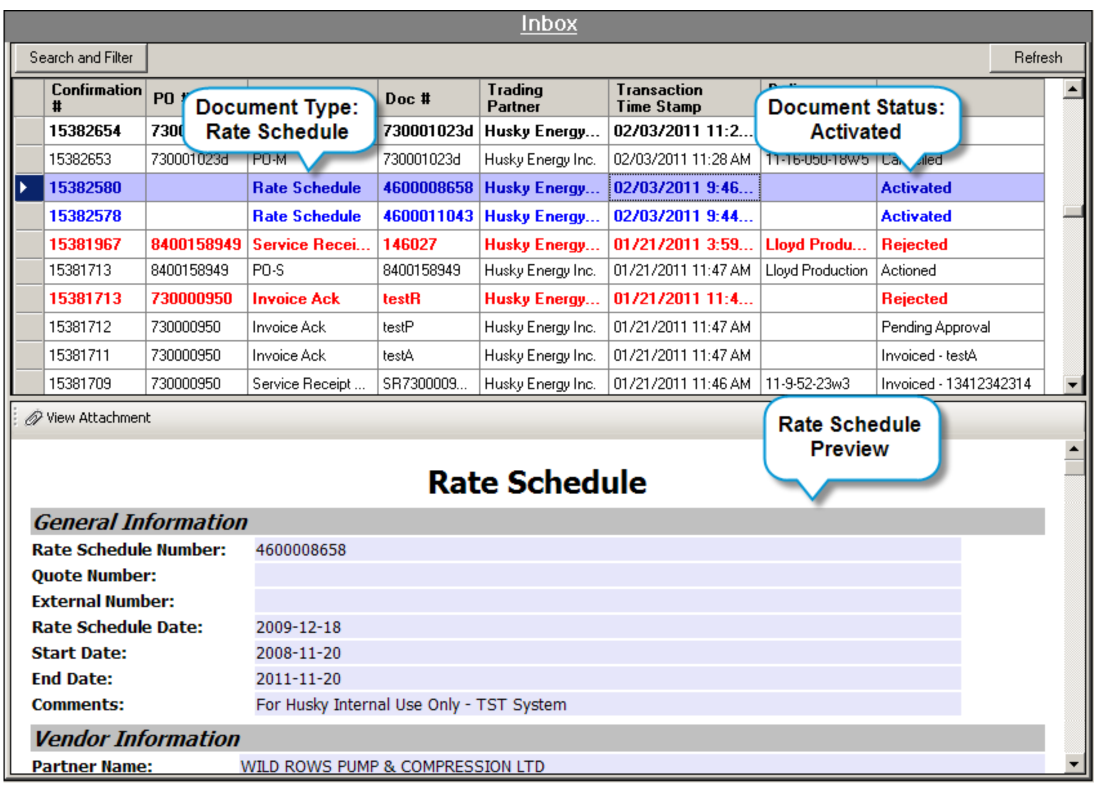
All new Rate Schedules sent by Husky Energy Inc. arrive in your Cortex **Inbox**.

TIP	Remember that to view the latest documents in your Inbox, you need to click the **Refresh** button.

You can easily distinguish a new Rate Schedule among the other documents in your **Inbox** by its appearance:

- A new Rate Schedule appears in **blue bold font**.
- The document type, displayed in the **Doc Type** column, is **Rate Schedule**.
- The document status, displayed in the **Status** column to the right, is **Activated**.

You can single-click a Rate Schedule in your **Inbox** to preview it in the Preview pane. The following is an example of a Rate Schedule in your **Inbox**:



NOTE	When a new Rate Schedule arrives in your **Inbox**, it will replace any previous version, and the older version will be automatically archived. You are able to manually archive a Rate Schedule in your **Inbox**. This is **NOT** recommended as until Husky sends you an updated schedule, the current one in your **Inbox** may be needed to create future Service Receipts. Any Service Receipts referencing that Rate Schedule may be rejected if the referenced schedule is not used. For details on how to unarchive accidentally archived Rate Schedule, refer to *Retrieving Accidentally Archived Rate Schedules* on page 9.

Upon receiving a new Rate Schedule in Cortex Desktop, you can review the details in the electronic version of the form, as well as print the original Rate Schedule.

For more details, refer to *Viewing and Printing Original Husky Rate Schedules* on page 2, or *Viewing Rate Schedules* on page 4.

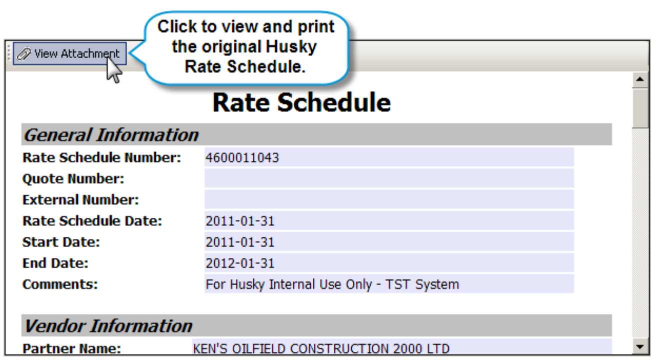
Viewing and Printing Original Husky Rate Schedules

You are able to preview and print the original Rate Schedule sent to you by Husky if desired.

NOTE	Keep in mind that the original Rate Schedule sent to you from Husky could be a very large file and may take longer than normal to view and print.

To display the Husky original Rate Schedule, do any of the following:

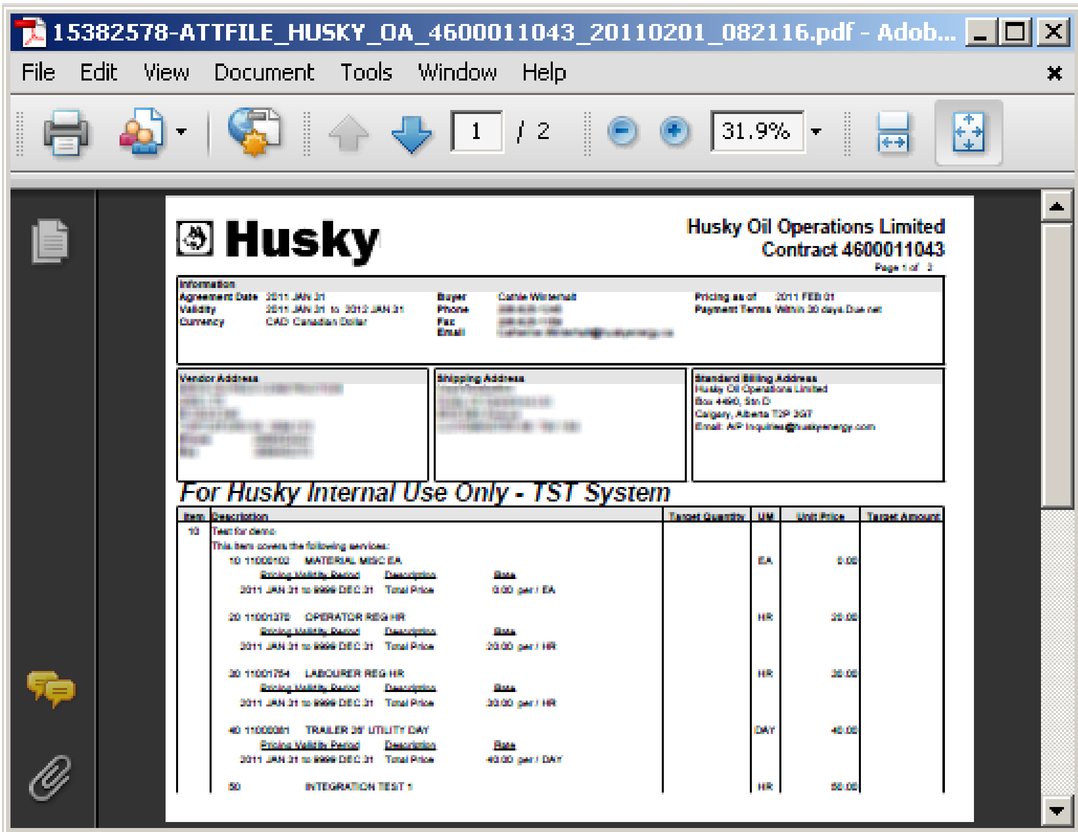
- If you are viewing the Rate Schedule in a Preview pane, click the **View Attachment** button at the top of the Rate Schedule header.



- If you are displaying the Rate Schedule in a full-sized window, click the **View Attachment** button at the bottom of that window.

NOTE	For details on viewing your Rate Schedule in a full-sized window, refer to *Viewing Rate Schedules* on page 4.

The original Husky Rate Schedule is opened in a separate window for a full screen view.



To print the original Husky Rate Schedule:

1 Click the **Print** icon  in the top left corner of the window.
A standard **Print** window is displayed.

2 Change any print settings, if desired, and then click **OK** to print the Rate Schedule.

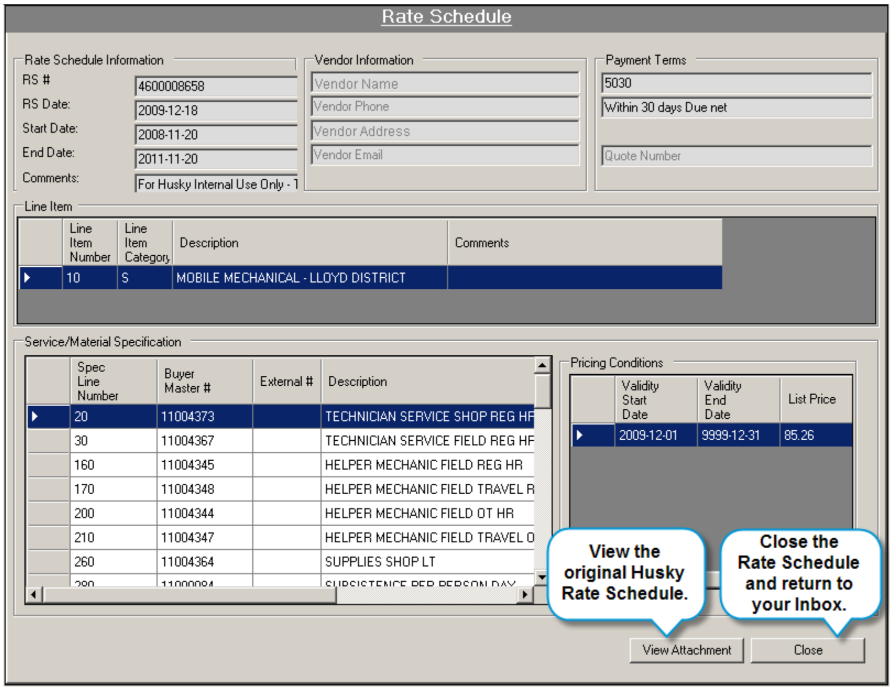
3 Click the **Close** button  in the top right corner of that window to close the original Husky Rate Schedule.

Viewing Rate Schedules

The easiest way to review all of the details of a Rate Schedule is to display it in a full-sized window.

To view a Rate Schedule:

1 In the **Inbox**, double-click on the row of the desired Rate Schedule.
The Rate Schedule is displayed in a full-sized window in the Desktop.



NOTE	The Rate Schedule window is for viewing purposes only. You are not able to edit any of the fields on this form.

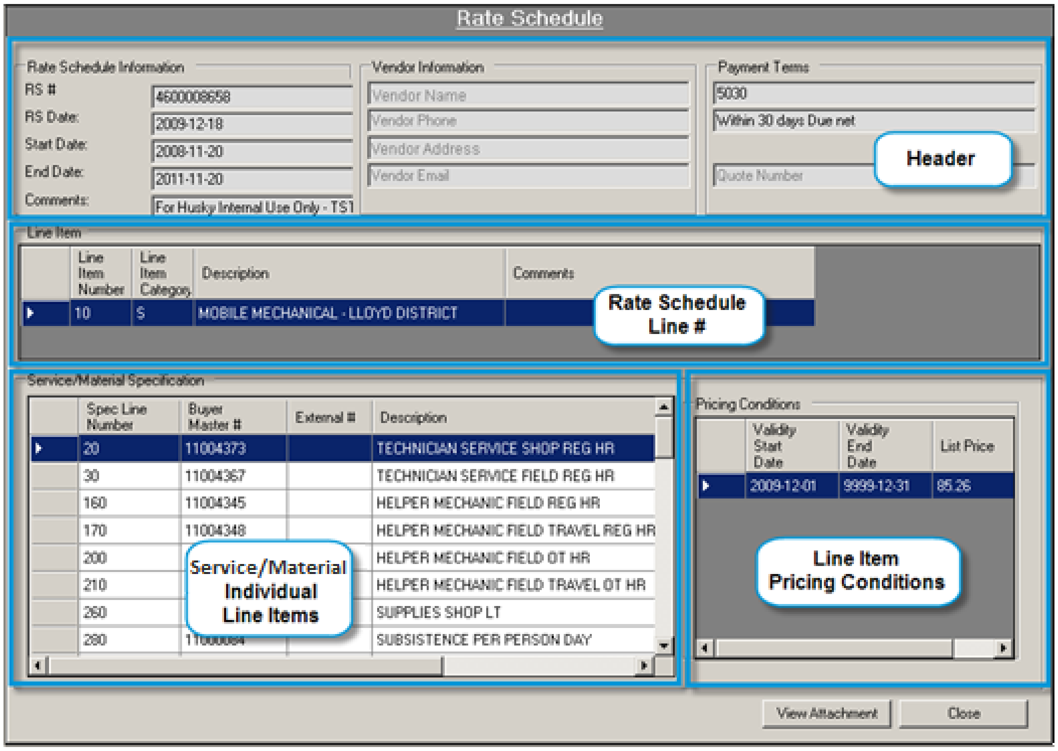
For a detailed description of the Rate Schedule form, refer to *Understanding Rate Schedule Forms* on page 4.

2 Click the **Close** button to return to your **Inbox**.

Understanding Rate Schedule Forms

When viewing a Rate Schedule in a full-sized window, the main areas of the Rate Schedule form are:

- **Header**: displays the general Rate Schedule information.
- **Line Item**: shows the line numbers contained on that Rate Schedule.
- **Service/Material Specification**: contains all of the individual products and services that can be entered as Line Items for the line number of the Rate Schedule selected in the **Line Item** area.
- **Pricing Conditions**: displays the pricing conditions applicable to the product or service selected in the **Service/Material Specification** area.



Rate Schedule Header

The Rate Schedule header displays details pertaining to the entire Rate Schedule.

The fields displayed on the Rate Schedule header are:

- **Rate Schedule #** – the identification number of the Rate Schedule. This number also displays as the **Doc #** in your **Inbox**.
- **Rate Schedule Date** – the date the Rate Schedule was created.
- **Start Date** – the start date of the Rate Schedule validity.
- **End Date** – the end date of the Rate Schedule validity.
- **Comments** – additional comments Husky has added pertaining to this specific Rate Schedule.
- **Vendor Information** – your company's details.
- **Payment Terms –** the terms of payment according to your agreement with Husky Energy Inc.
- **Quote Number** – an external number that allows for unique document tracking.

Rate Schedule Line Item Area

The Rate Schedule **Line Item** area lists the line numbers contained within that Rate Schedule. Your **Line #** selection will determine which items are listed in the **Service/Material Specification**.

The fields displayed in the **Line Item** area are:

- **Line Item Number** – the Line Item number for that line of the Rate Schedule.

- **Line Item Category** – indicates the category for that Rate Schedule line: **M** for Materials or **S** for Services.
- **Description** – the description of that Rate Schedule line.
- **Comments** – details and comments for that Rate Schedule line.

Rate Schedule Service/Material Specification Area

The Rate Schedule **Service/Material Specification** area displays the products and services contained in the Rate Schedule line selected in the **Line Item** area above. These are the actual items that you will be adding to your Service receipt as Line Items.

The fields displayed in the **Service/Material Specification** area are:

- **Spec Line Number** – the specification line number.
- **Buyer Master #** – Husky's master number for this item.
- **External #** – the external identification number for the item, if Husky has this information.
- **Description** – the item description.
- **UOM** – the unit of measure for that item.

Rate Schedule Pricing Conditions Area

The Rate Schedule **Pricing Conditions** area displays any pricing conditions applicable for the product or service selected in the **Service/Material Specification** area.

The fields displayed in the **Service/Material Specification** area are:

- **Validity Start Date** and **Validity End Date** – any specific date validity requirements for that item in addition to the overall Rate Schedule start and end dates.
- **List Price** – the unit price for that item during the specified validity dates. This amount will populate the **List Price** column for your Service Receipt Line Items.

NOTE	If your service dates extend beyond the validity date range of the Rate Schedule, you must create another Service Receipt to cover services from outside these date ranges.

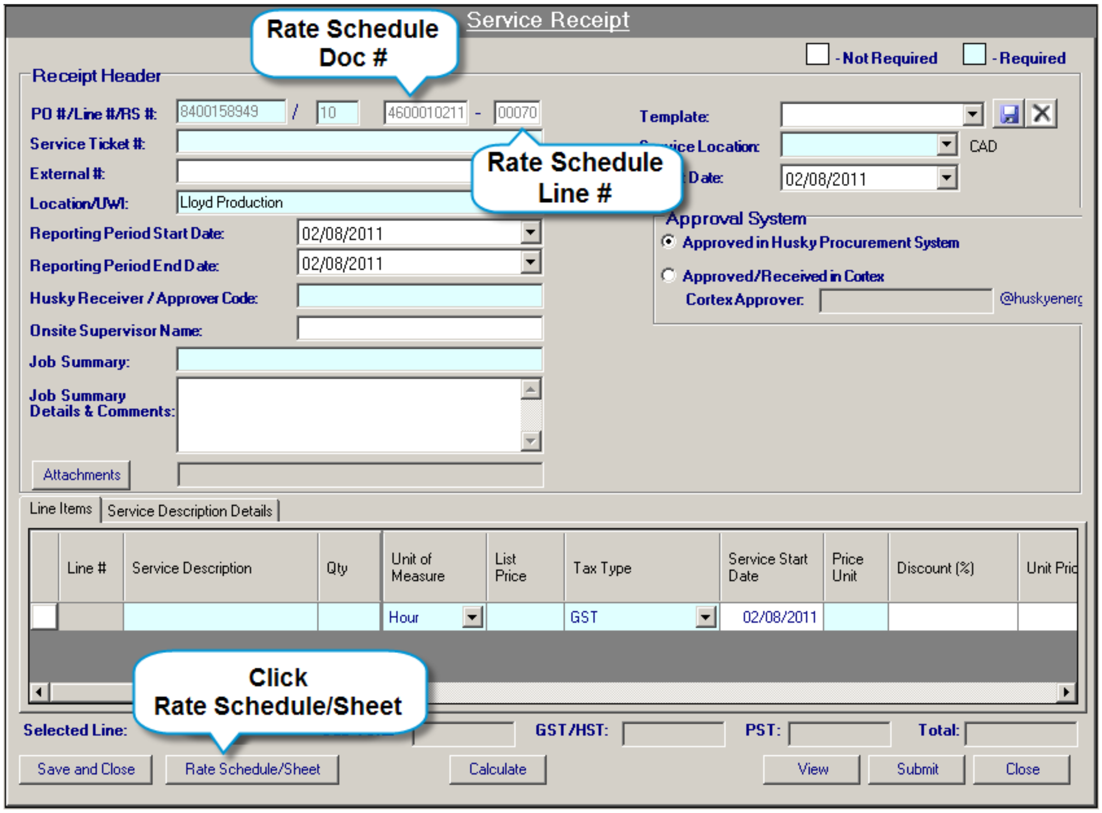
Using Rate Schedules

The products and services contained in your Rate Schedule can be quickly added as Line Items on your Service Receipts. By using the appropriate Rate Schedule for each Service Receipt, you reduce your chances of receiving rejections from Husky Energy Inc.

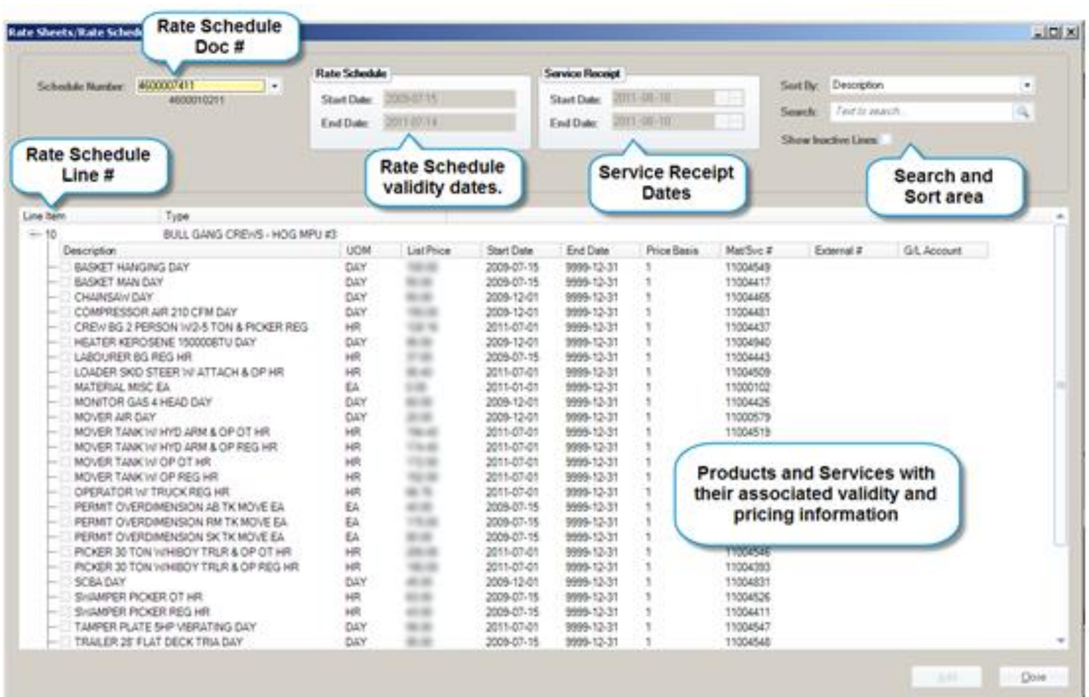
NOTE	If Husky has sent you a Purchase Order referencing a Rate Schedule, you must use this Rate Schedule to create your Service Receipt or it may be rejected. When a Service Receipt references a specific Rate Schedule, the Rate Schedule **Doc #** and the **Line #** will display on your Service Receipt form. You will not be able use any other Rate Schedule when creating that Service Receipt; however you are able to add items from other line numbers contained on that Rate Schedule.

To use Rate Schedules when creating your Service Receipts:

1 While creating a Service Receipt, click the **Rate Schedule/Sheet** button at the bottom of the form.



The **Rate Sheets/Rate Schedules** window is displayed.



2 Select the correct Rate Schedule from the **Schedule Number** drop down list. Only valid Rate Schedules will be available.
The associated Rate Schedule **Line #** will be displayed.

NOTE The Rate Schedule validity dates will be applicable to the Rate Schedule selected in the **Schedule Number** field.

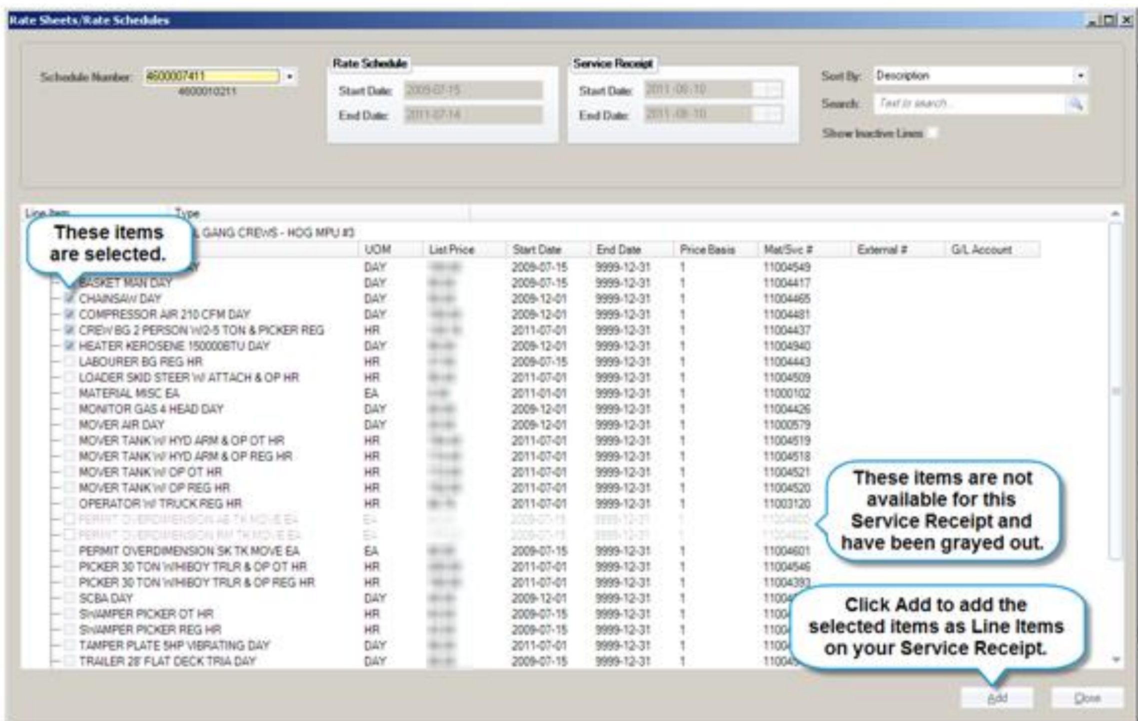
You will only be able to select the products and services listed that have pricing conditions applicable to the Service Receipt dates.

3 Check the boxes beside the appropriate products and services.

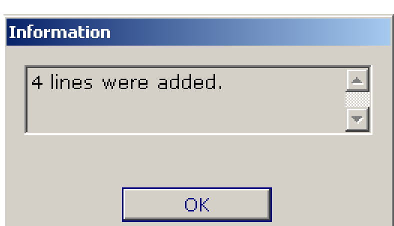
TIP To easily navigate and find items in your Rate Schedule, use one of the following:

- Use the **Sort By** field to sort the columns in ascending or descending order.
- Use the **Search** field to perform a text search for specific items.

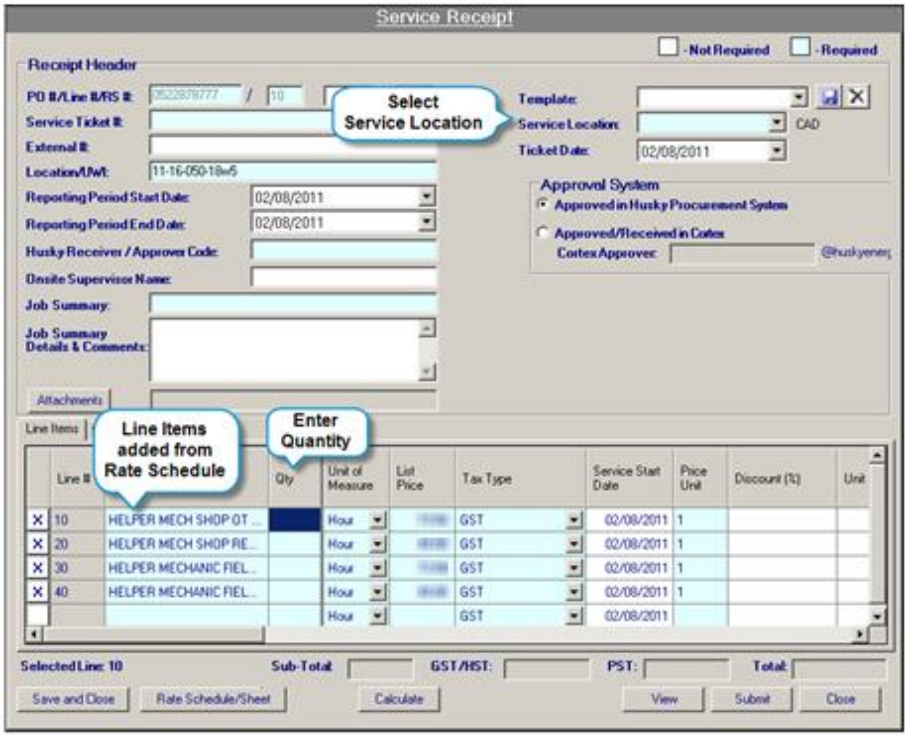
4 Click the **Add** button.



The **Information** window is displayed, showing how many items were added to the Service Receipt.



5 Click **OK**.
You will be returned to your Service Receipt. The products and services selected on the Rate Schedule will be listed in your Line Items.



6 Enter the quantity in the **Qty** column.

7 Ensure a **Service Location** is selected.

8 Review and complete the rest of the details for your Service Receipt and Line Items. For details, refer to the **Husky Energy Inc. Services Guide**.

9 Submit the Service Receipt to Husky.

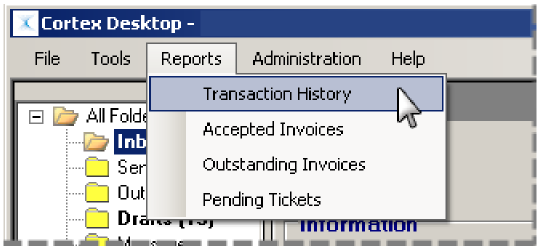
Retrieving Accidentally Archived Rate Schedules

When a new Rate Schedule arrives in your **Inbox**, it will replace the current **Activated** Rate Schedule with that **Doc #** and the older version will be automatically archived. The status of this automatically archived Rate Schedule will change to **Cancelled**.

You are able to manually archive a Rate Schedule in your **Inbox**. This is **NOT** recommended as until Husky sends you an updated schedule, the current one in your **Inbox** may be needed to create future Service Receipts. Any Service Receipts referencing that Rate Schedule may be rejected if the referenced schedule is not used. Manually archived Rate Schedules will keep the **Activated** status.

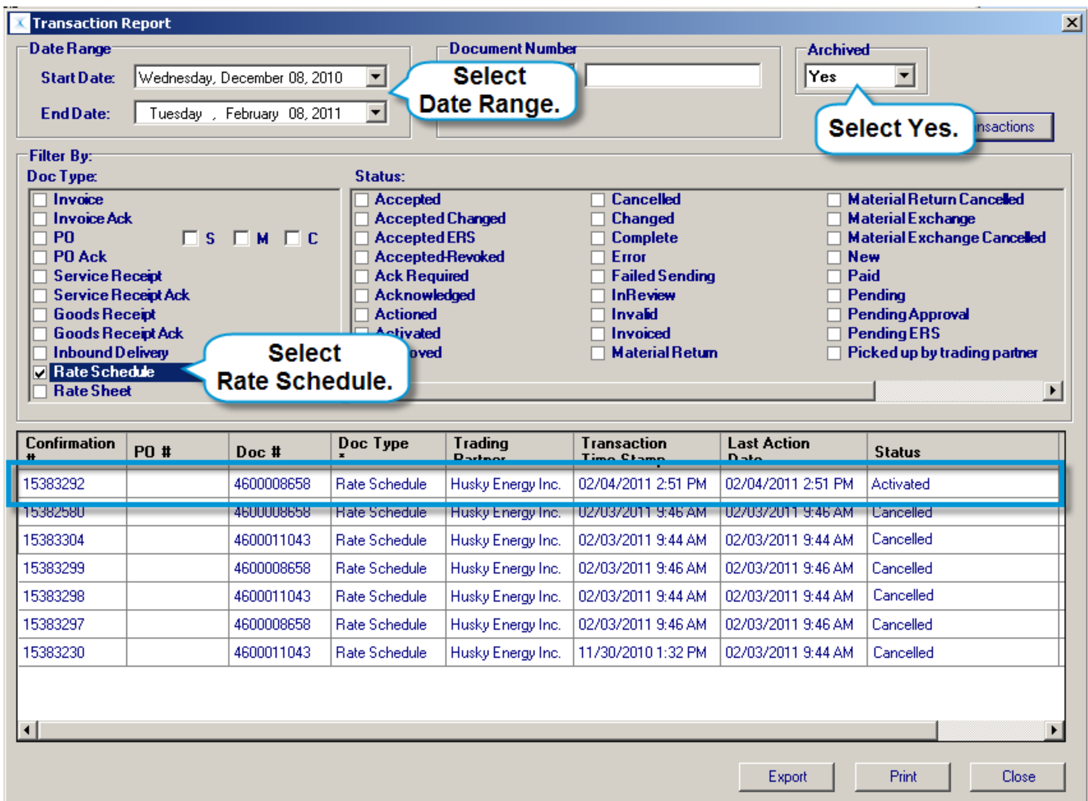
To retrieve accidentally archived Rate Schedules:

1 Open the **Transaction Report** window by selecting **Transaction History** from the **Reports** menu.



2 Run a **Transaction Report** with the following settings:

- **Date Range**: enter the applicable date range.
- **Archived**: select **Yes**.
- **Doc Type**: select **Rate Schedule**.

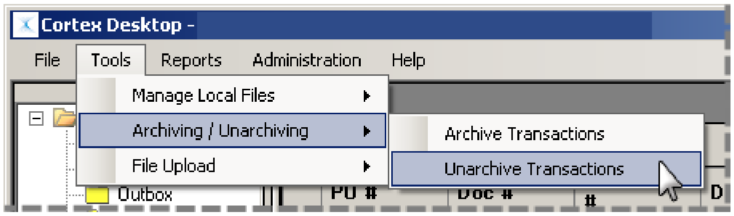


3 Click **Get Transactions**.

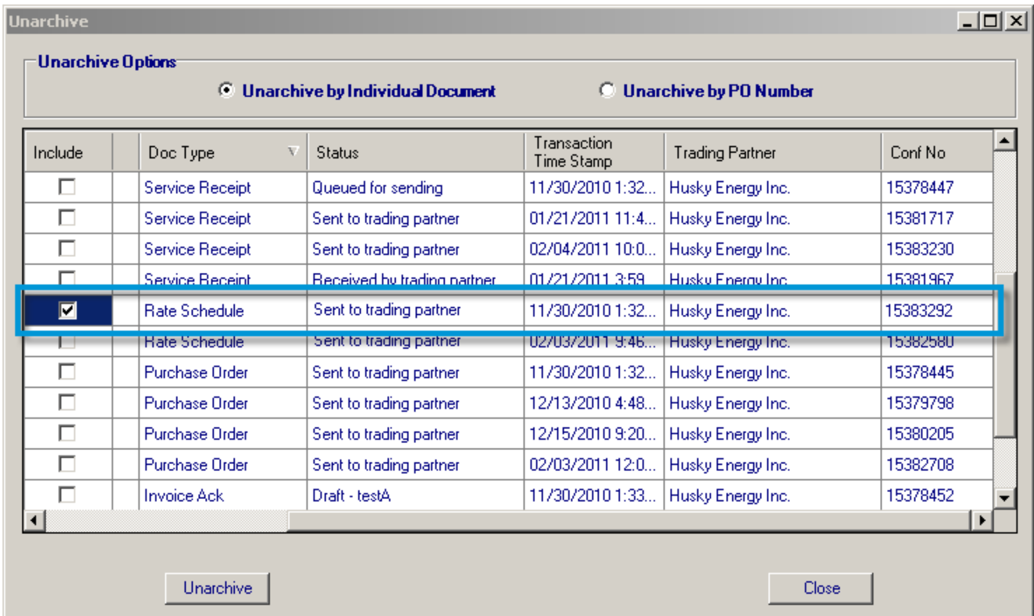
4 Record the **Confirmation #** of the archived Rate Schedule with the status of **Activated**.

5 Click the **Close** button to close the **Transaction Report** window.

6 Open the **Unarchive** window by selecting **Archiving/Unarchiving** > **Unarchive Transactions** from the **Tools** menu.



7 Locate the Rate Schedule with the **Conf No** that you recorded in step 4.



TIP To easily find the correct Rate Schedule, sort the columns by clicking on the column header.

8 Check the box for the correct Rate Schedule in the **Include** column.

9 Click the **Unarchive** button.