## Rate Update Batch - Apply a Rate Change

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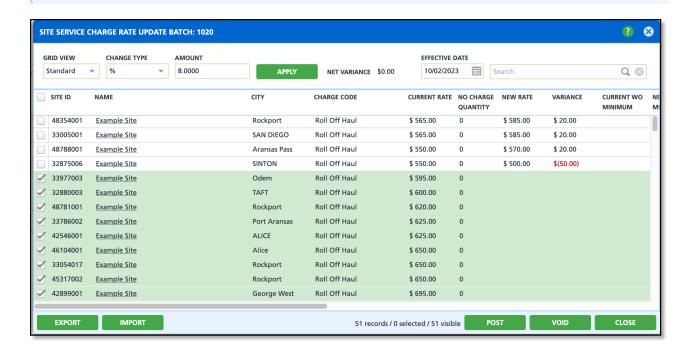
#### Pathway: Sales > Rate Update Batch

The Rate Update Batches tool is used to mass update rates for sites by either a percentage or an entered value amount. This tool offers two options to create a batch rates are updated in: Site Service Batch or Site Service Charge Batch. Site Service Batch is used to create a batch for sites receiving recurring services. Site Service Charge Batch is used to create a batch for sites receiving one-time charges. After a batch has been created it will display on the Rate Update Batches screen with an 'Open' status. Color coding is used to identify batch status using the following colors:

- Open = White
- Green = Posted
- Red = Voided



This article details the process of updating rates after a batch has been created. If a site included in the rate update batch has a future service change, an error will display for the site and it will not be included in the rate update. A tooltip will display upon hover to identify the reason for the error.



### **Permissions**

The following permissions are required to use the Rate Update Batch screen and its features:

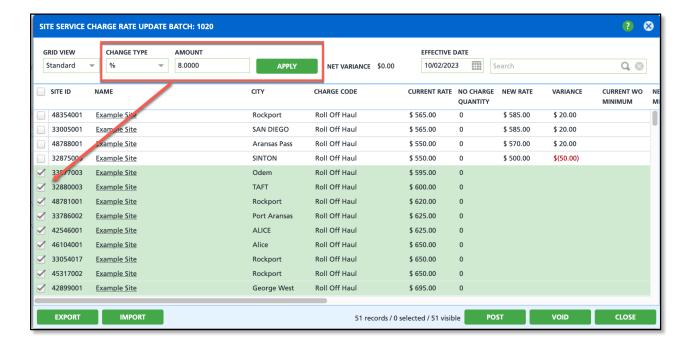
Permission ID	Permission Name
106	Rate Update Batches
107	Create Rate Update Batch
108	Post Rate Update Batch

# **Field Descriptions**

Modifications	Descriptions
Grid View	Defaults to Standard view. Other option included: Extended.
Change Type	Increase or decrease rates by percentage or amount when updating in bulk for selected sites.
Amount	Indicates the amount to adjust rates by. If rates are being decreased, place a minus sign in front of the numeric value.
Export	Option to export what is currently displayed to Excel in CSV format where rates can be externally updated and imported back in.
Import	Option to import a CSV document into the tool. After a batch has been exported and rates updated in Excel, use the Import option to import the rate changes back into Navusoft.
Post	Posts the new rates to the accounts and updates the batch status to Posted.   Once a batch is in a posted status it can not be updated.
Void	Select Void to void the batch. Rates will not be updated for voided batches.
Close	Select Close to close the Rate Update Batches tool.

## **Apply a Rate Change to Multiple Accounts**

The following process applies to both 'Site Service Charge Rate Update Batch' and 'Site Service Rate Update Batch' screens. Using the 'Change Type' and 'Amount' fields at the top of the screen, enter the amount for the new rate, and it will be applied to all the selected sites.



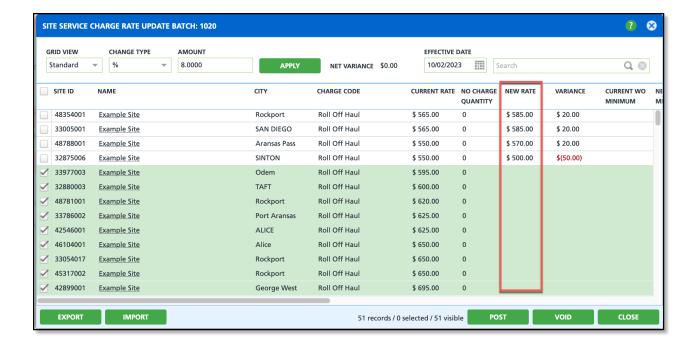


The process outlined below assumes the batch has already been created and is in an 'Open' status.

- 1. Double click on the open batch from the Rate Update Batch screen to open the editor.
- 2. Select the Change Type to indicate how you would like the system to update the rate. Options include:
  - Percentage: If selected, enter the percentage in the Amount field you would like the rate increased or decreased by.
  - Amount: If selected, enter the amount in the Amount field you would like increase rates by.
- 3. Enter the **Amount** of the change.
  - a. Increase Rate: Enter a positive value in the Amount field.
  - b. **Decrease Rate**: Enter a negative value in the Amount field.
- 4. Select the checkbox for each site the rate change applies to.
- 5. Select **Apply** when finished.
- 6. Select **Post** and the new rates will be posted to the sites they apply.

## **Apply a Rate Change to Individual Accounts**

The following process applies to both 'Site Service Charge Rate Update Batch' and 'Site Service Rate Update Batch' screens. Individually apply a rate change to accounts by selecting within the New Rate field for a site and entering a new rate.





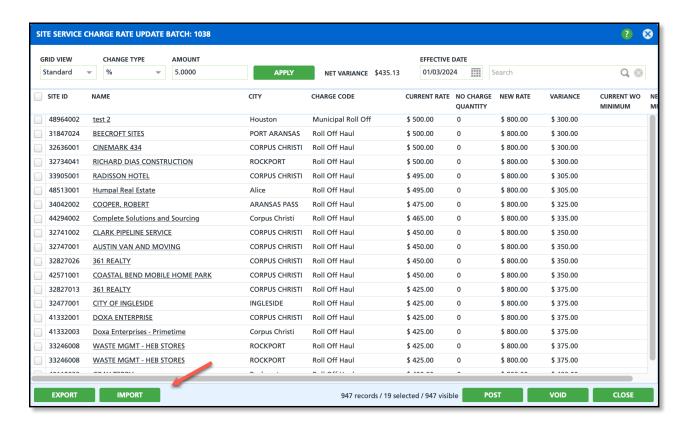
The process outlined below assumes the batch has already been created and is in an 'Open' status.

- 1. Double click on the open batch from the Rate Update Batch screen to open the editor.
- 2. Click within the 'New Rate' column for a site and enter the new rate. Click away when finished to apply the change. This will also trigger the calculation in the Variance column.
- 3. Continue until all new rates have been entered.
- 4. Select **Post** and the new rate(s) will be posted to the sites they apply.

## **Export to Excel & Import Changes**

Export a Rate Update Batch to Excel to externally apply rate changes. When finished, import the CSV file back into the Rate Update Batch for the corresponding batch. The system will then match the "New Rate" column in

Navusoft with the "New Rate" column in the CSV file.

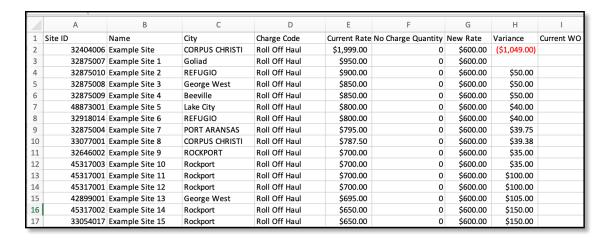


#### **Export**

Upon selecting Export, all sites listed on the screen will be exported in CSV format to Excel. In there, users can use the features of Excel to update rates before importing them back into Navusoft.

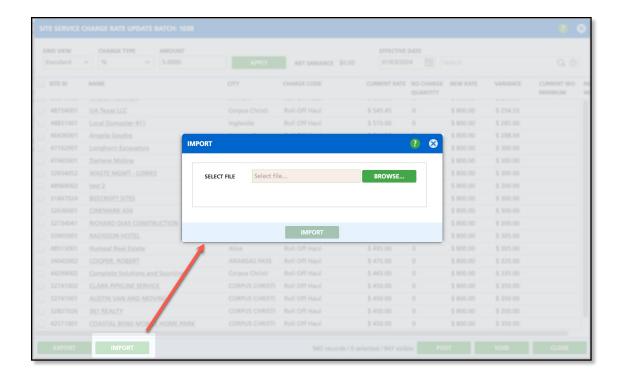


Values entered in the New Rate field will override a previously entered new rate for the open batch.



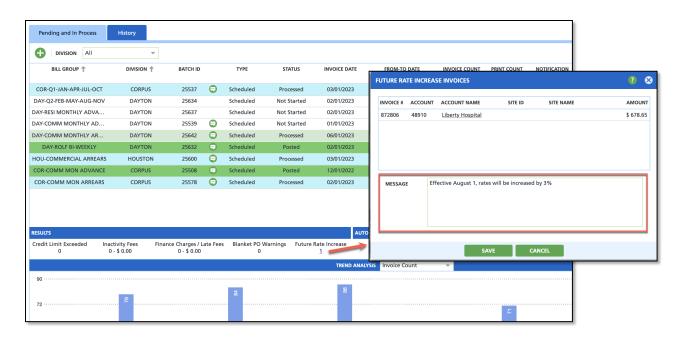
#### Import

After changes are complete, import the CSV file back into Navusoft to apply the new rates. **Do not alter the format** of the CSV document.



# **Notify Customers of Future Rate Increase**

In the Results section of the Billing screen, a 'Future Rate Increase' count is displayed. Select the numeric value to display a list of accounts the rate increase will be applied to for the selected batch. To communicate rate increases out to your customers, enter a message in the Message text box of the 'Future Rate Increase Invoices' popup window where it will be displayed on invoices.



#### **Related Articles:**

Rate Update Batch

