

Rate Update Batch - Apply a Rate Change

Last Modified on 01/15/2024 12:39 pm EST

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.

SITE SERVICE CHARGE RATE UPDATE BATCH: 1020													
GRID VIEW	CHANGE TYPE	AMOUNT			EFFECTIVE DATE								
Standard	%	8.0000	APPLY	NET VARIANCE	\$0.00	10/02/2023	Search						
<input type="checkbox"/>	SITE ID	NAME	CITY	CHARGE CODE	CURRENT RATE	NO CHARGE QUANTITY	NEW RATE	VARIANCE	CURRENT WO MINIMUM	NE MI			
<input type="checkbox"/>	48354001	Example Site	Rockport	Roll Off Haul	\$ 565.00	0	\$ 585.00	\$ 20.00					
<input type="checkbox"/>	33005001	Example Site	SAN DIEGO	Roll Off Haul	\$ 565.00	0	\$ 585.00	\$ 20.00					
<input type="checkbox"/>	48788001	Example Site	Aransas Pass	Roll Off Haul	\$ 550.00	0	\$ 570.00	\$ 20.00					
<input type="checkbox"/>	32875006	Example Site	SINTON	Roll Off Haul	\$ 550.00	0	\$ 500.00	\$(50.00)					
<input checked="" type="checkbox"/>	33977003	Example Site	Odem	Roll Off Haul	\$ 595.00	0							
<input checked="" type="checkbox"/>	32880003	Example Site	TAFT	Roll Off Haul	\$ 600.00	0							
<input checked="" type="checkbox"/>	48781001	Example Site	Rockport	Roll Off Haul	\$ 620.00	0							
<input checked="" type="checkbox"/>	33786002	Example Site	Port Aransas	Roll Off Haul	\$ 625.00	0							
<input checked="" type="checkbox"/>	42546001	Example Site	ALICE	Roll Off Haul	\$ 625.00	0							
<input checked="" type="checkbox"/>	46104001	Example Site	Alice	Roll Off Haul	\$ 650.00	0							
<input checked="" type="checkbox"/>	33054017	Example Site	Rockport	Roll Off Haul	\$ 650.00	0							
<input checked="" type="checkbox"/>	45317002	Example Site	Rockport	Roll Off Haul	\$ 650.00	0							
<input checked="" type="checkbox"/>	42899001	Example Site	George West	Roll Off Haul	\$ 695.00	0							
EXPORT			IMPORT			51 records / 0 selected / 51 visible		POST		VOID		CLOSE	

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.

SITE SERVICE CHARGE RATE UPDATE BATCH: 1020

GRID VIEW Standard	CHANGE TYPE %	AMOUNT 8.0000	APPLY	NET VARIANCE \$0.00	EFFECTIVE DATE 10/02/2023
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	SITE ID	NAME	CITY	CHARGE CODE	CURRENT RATE	NO CHARGE QUANTITY	NEW RATE	VARIANCE	CURRENT WO MINIMUM
<input type="checkbox"/>	48354001	Example Site	Rockport	Roll Off Haul	\$ 565.00	0	\$ 585.00	\$ 20.00	
<input type="checkbox"/>	33005001	Example Site	SAN DIEGO	Roll Off Haul	\$ 565.00	0	\$ 585.00	\$ 20.00	
<input type="checkbox"/>	48788001	Example Site	Aransas Pass	Roll Off Haul	\$ 550.00	0	\$ 570.00	\$ 20.00	
<input type="checkbox"/>	32875001	Example Site	SINTON	Roll Off Haul	\$ 550.00	0	\$ 500.00	\$(50.00)	
<input checked="" type="checkbox"/>	33077003	Example Site	Odem	Roll Off Haul	\$ 595.00	0			
<input checked="" type="checkbox"/>	32880003	Example Site	TAFT	Roll Off Haul	\$ 600.00	0			
<input checked="" type="checkbox"/>	48781001	Example Site	Rockport	Roll Off Haul	\$ 620.00	0			
<input checked="" type="checkbox"/>	33786002	Example Site	Port Aransas	Roll Off Haul	\$ 625.00	0			
<input checked="" type="checkbox"/>	42546001	Example Site	ALICE	Roll Off Haul	\$ 625.00	0			
<input checked="" type="checkbox"/>	46104001	Example Site	Alice	Roll Off Haul	\$ 650.00	0			
<input checked="" type="checkbox"/>	33054017	Example Site	Rockport	Roll Off Haul	\$ 650.00	0			
<input checked="" type="checkbox"/>	45317002	Example Site	Rockport	Roll Off Haul	\$ 650.00	0			
<input checked="" type="checkbox"/>	42899001	Example Site	George West	Roll Off Haul	\$ 695.00	0			

EXPORT IMPORT 51 records / 0 selected / 51 visible POST VOID CLOSE



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.

SITE SERVICE CHARGE RATE UPDATE BATCH: 1020										
GRID VIEW	CHANGE TYPE	AMOUNT			EFFECTIVE DATE					
Standard	%	8.0000	APPLY	NET VARIANCE \$0.00	10/02/2023	Search				
<input type="checkbox"/>	SITE ID	NAME	CITY	CHARGE CODE	CURRENT RATE	NO CHARGE QUANTITY	NEW RATE	VARIANCE	CURRENT WO MINIMUM	NE MI
<input type="checkbox"/>	48354001	Example Site	Rockport	Roll Off Haul	\$ 565.00	0	\$ 585.00	\$ 20.00		
<input type="checkbox"/>	33005001	Example Site	SAN DIEGO	Roll Off Haul	\$ 565.00	0	\$ 585.00	\$ 20.00		
<input type="checkbox"/>	48788001	Example Site	Aransas Pass	Roll Off Haul	\$ 550.00	0	\$ 570.00	\$ 20.00		
<input type="checkbox"/>	32875006	Example Site	SINTON	Roll Off Haul	\$ 550.00	0	\$ 500.00	\$(50.00)		
<input checked="" type="checkbox"/>	33977003	Example Site	Odem	Roll Off Haul	\$ 595.00	0				
<input checked="" type="checkbox"/>	32880003	Example Site	TAFT	Roll Off Haul	\$ 600.00	0				
<input checked="" type="checkbox"/>	48781001	Example Site	Rockport	Roll Off Haul	\$ 620.00	0				
<input checked="" type="checkbox"/>	33786002	Example Site	Port Aransas	Roll Off Haul	\$ 625.00	0				
<input checked="" type="checkbox"/>	42546001	Example Site	ALICE	Roll Off Haul	\$ 625.00	0				
<input checked="" type="checkbox"/>	46104001	Example Site	Alice	Roll Off Haul	\$ 650.00	0				
<input checked="" type="checkbox"/>	33054017	Example Site	Rockport	Roll Off Haul	\$ 650.00	0				
<input checked="" type="checkbox"/>	45317002	Example Site	Rockport	Roll Off Haul	\$ 650.00	0				
<input checked="" type="checkbox"/>	42899001	Example Site	George West	Roll Off Haul	\$ 695.00	0				

EXPORT IMPORT 51 records / 0 selected / 51 visible POST VOID CLOSE



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.

SITE SERVICE CHARGE RATE UPDATE BATCH: 1038

NET VARIANCE \$435.13

SITE ID	NAME	CITY	CHARGE CODE	CURRENT RATE	NO CHARGE QUANTITY	NEW RATE	VARIANCE	CURRENT WO MINIMUM	NE MI
<input type="checkbox"/>	48964002	test_2	Houston	Municipal Roll Off	\$ 500.00	0	\$ 800.00	\$ 300.00	
<input type="checkbox"/>	31847024	BEECROFT SITES	PORT ARANSAS	Roll Off Haul	\$ 500.00	0	\$ 800.00	\$ 300.00	
<input type="checkbox"/>	32636001	CINEMARK 434	CORPUS CHRISTI	Roll Off Haul	\$ 500.00	0	\$ 800.00	\$ 300.00	
<input type="checkbox"/>	32734041	RICHARD DIAS CONSTRUCTION	ROCKPORT	Roll Off Haul	\$ 500.00	0	\$ 800.00	\$ 300.00	
<input type="checkbox"/>	33905001	RADISSON HOTEL	CORPUS CHRISTI	Roll Off Haul	\$ 495.00	0	\$ 800.00	\$ 305.00	
<input type="checkbox"/>	48513001	Humpal Real Estate	Alice	Roll Off Haul	\$ 495.00	0	\$ 800.00	\$ 305.00	
<input type="checkbox"/>	34042002	COOPER, ROBERT	ARANSAS PASS	Roll Off Haul	\$ 475.00	0	\$ 800.00	\$ 325.00	
<input type="checkbox"/>	44294002	Complete Solutions and Sourcing	Corpus Christi	Roll Off Haul	\$ 465.00	0	\$ 800.00	\$ 335.00	
<input type="checkbox"/>	32741002	CLARK PIPELINE SERVICE	CORPUS CHRISTI	Roll Off Haul	\$ 450.00	0	\$ 800.00	\$ 350.00	
<input type="checkbox"/>	32747001	AUSTIN VAN AND MOVING	CORPUS CHRISTI	Roll Off Haul	\$ 450.00	0	\$ 800.00	\$ 350.00	
<input type="checkbox"/>	32827026	361 REALTY	CORPUS CHRISTI	Roll Off Haul	\$ 450.00	0	\$ 800.00	\$ 350.00	
<input type="checkbox"/>	42571001	COASTAL BEND MOBILE HOME PARK	CORPUS CHRISTI	Roll Off Haul	\$ 450.00	0	\$ 800.00	\$ 350.00	
<input type="checkbox"/>	32827013	361 REALTY	CORPUS CHRISTI	Roll Off Haul	\$ 425.00	0	\$ 800.00	\$ 375.00	
<input type="checkbox"/>	32477001	CITY OF INGLESIDE	INGLESIDE	Roll Off Haul	\$ 425.00	0	\$ 800.00	\$ 375.00	
<input type="checkbox"/>	41332001	DOXA ENTERPRISE	CORPUS CHRISTI	Roll Off Haul	\$ 425.00	0	\$ 800.00	\$ 375.00	
<input type="checkbox"/>	41332003	Doxa Enterprises - Primetime	Corpus Christi	Roll Off Haul	\$ 425.00	0	\$ 800.00	\$ 375.00	
<input type="checkbox"/>	33246008	WASTE MGMT - HEB STORES	ROCKPORT	Roll Off Haul	\$ 425.00	0	\$ 800.00	\$ 375.00	
<input type="checkbox"/>	33246008	WASTE MGMT - HEB STORES	ROCKPORT	Roll Off Haul	\$ 425.00	0	\$ 800.00	\$ 375.00	

947 records / 19 selected / 947 visible

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.

	A	B	C	D	E	F	G	H	I
1	Site ID	Name	City	Charge Code	Current Rate	No Charge Quantity	New Rate	Variance	Current WO
2	32404006	Example Site	CORPUS CHRISTI	Roll Off Haul	\$1,999.00	0	\$600.00	(\$1,049.00)	
3	32875007	Example Site 1	Goliad	Roll Off Haul	\$950.00	0	\$600.00		
4	32875010	Example Site 2	REFUGIO	Roll Off Haul	\$900.00	0	\$600.00	\$50.00	
5	32875008	Example Site 3	George West	Roll Off Haul	\$850.00	0	\$600.00	\$50.00	
6	32875009	Example Site 4	Beeville	Roll Off Haul	\$850.00	0	\$600.00	\$50.00	
7	48873001	Example Site 5	Lake City	Roll Off Haul	\$800.00	0	\$600.00	\$40.00	
8	32918014	Example Site 6	REFUGIO	Roll Off Haul	\$800.00	0	\$600.00	\$40.00	
9	32875004	Example Site 7	PORT ARANSAS	Roll Off Haul	\$795.00	0	\$600.00	\$39.75	
10	33077001	Example Site 8	CORPUS CHRISTI	Roll Off Haul	\$787.50	0	\$600.00	\$39.38	
11	32646002	Example Site 9	ROCKPORT	Roll Off Haul	\$700.00	0	\$600.00	\$35.00	
12	45317003	Example Site 10	Rockport	Roll Off Haul	\$700.00	0	\$600.00	\$35.00	
13	45317001	Example Site 11	Rockport	Roll Off Haul	\$700.00	0	\$600.00	\$100.00	
14	45317001	Example Site 12	Rockport	Roll Off Haul	\$700.00	0	\$600.00	\$100.00	
15	42899001	Example Site 13	George West	Roll Off Haul	\$695.00	0	\$600.00	\$105.00	
16	45317002	Example Site 14	Rockport	Roll Off Haul	\$650.00	0	\$600.00	\$150.00	
17	33054017	Example Site 15	Rockport	Roll Off Haul	\$650.00	0	\$600.00	\$150.00	

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.**

SITE SERVICE CHARGE RATE UPDATE BATCH: 1038

GRID VIEW CHANGE TYPE AMOUNT EFFECTIVE DATE
Standard % 5,000 APPLY NET VARIANCE \$0.00 01/03/2024

SITE ID	NAME	CITY	CHARGE CODE	CURRENT RATE	NO CHARGE QUANTITY	NEW RATE	VARIANCE	CURRENT W/ MINIMUM
48754001	UA, Texas LLC	Corpus Christi	Roll Off Haul	\$ 545.45	0	\$ 800.00	\$ 254.55	
48831001	Local Dumpster #11	Ingleside	Roll Off Haul	\$ 515.00	0	\$ 800.00	\$ 285.00	
48436001	Angela Gaydos					\$ 800.00	\$ 288.04	
47162001	Longhorn Excavators					\$ 800.00	\$ 300.00	
47485001	Darlene Molina					\$ 800.00	\$ 300.00	
32654052	WASTE MGMT...LOWES					\$ 800.00	\$ 300.00	
48964002	test 2					\$ 800.00	\$ 300.00	
31847024	BEECROFT SITES					\$ 800.00	\$ 300.00	
32636001	CINEMARK 434					\$ 800.00	\$ 300.00	
32734041	RICHARD DIAS CONSTRUCTION					\$ 800.00	\$ 300.00	
33905001	RADISSON HOTEL					\$ 800.00	\$ 305.00	
48513001	Humal Real Estate	Alice	Roll Off Haul	\$ 495.00	0	\$ 800.00	\$ 305.00	
34042002	COOPER, ROBERT	ARANSAS PASS	Roll Off Haul	\$ 475.00	0	\$ 800.00	\$ 325.00	
44294002	Complete Solutions and Sourcing	Corpus Christi	Roll Off Haul	\$ 465.00	0	\$ 800.00	\$ 335.00	
32741002	CLARK PIPELINE SERVICE	CORPUS CHRISTI	Roll Off Haul	\$ 450.00	0	\$ 800.00	\$ 350.00	
32747001	AUSTIN VAN AND MOVING	CORPUS CHRISTI	Roll Off Haul	\$ 450.00	0	\$ 800.00	\$ 350.00	
32827026	361 REALTY	CORPUS CHRISTI	Roll Off Haul	\$ 450.00	0	\$ 800.00	\$ 350.00	
42571001	COASTAL BEND MO...HOME PARK	CORPUS CHRISTI	Roll Off Haul	\$ 450.00	0	\$ 800.00	\$ 350.00	

EXPORT IMPORT 947 records / 0 selected / 947 visible POST VOID CLOSE

IMPORT dialog box: SELECT FILE [Select file...] BROWSE... IMPORT

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.

Pending and In Process History

+ DIVISION All

BILL GROUP ↑	DIVISION ↑	BATCH ID	TYPE	STATUS	INVOICE DATE	FROM TO DATE	INVOICE COUNT	PRINT COUNT	NOTIFICATION
COR-Q1-JAN-APR-JUL-OCT	CORPUS	25537	Scheduled	Processed	03/01/2023				
DAY-Q2-FEB-MAY-AUG-NOV	DAYTON	25634	Scheduled	Not Started	02/01/2023				
DAY-RESI MONTHLY ADVA...	DAYTON	25637	Scheduled	Not Started	02/01/2023				
DAY-COMM MONTHLY AD...	DAYTON	25539	Scheduled	Not Started	01/01/2023				
DAY-COMM MONTHLY AR...	DAYTON	25642	Scheduled	Processed	06/01/2023				
DAY-ROLF BI-WEEKLY	DAYTON	25632	Scheduled	Posted	02/01/2023				
HOU-COMMERCIAL ARREARS	HOUSTON	25600	Scheduled	Processed	03/01/2023				
COR-COMM MON ADVANCE	CORPUS	25508	Scheduled	Posted	12/01/2022				
COR-COMM MON ARREARS	CORPUS	25578	Scheduled	Processed	02/01/2023				

RESULTS

Credit Limit Exceeded	Inactivity Fees	Finance Charges / Late Fees	Blanket PO Warnings	Future Rate Increase
0	0 - \$ 0.00	0 - \$ 0.00	0	1

FUTURE RATE INCREASE INVOICES

INVOICE #	ACCOUNT	ACCOUNT NAME	SITE ID	SITE NAME	AMOUNT
872806	48910	Liberty Hospital			\$ 678.65

MESSAGE: Effective August 1, rates will be increased by 3%

SAVE CANCEL

TREND ANALYSIS Invoice Count

90
72

78 84 88 71

Related Articles:

[Rate Update Batch](#)

