

Rate Update Batch

Last Modified on 01/12/2024 3:01 pm EST

Pathway: Sales > Rate Update Batch

The *Rate Update Batch* 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: *Site Service Batch* or *Site Service Charge Batch*. **Site Service Batch** is used for sites receiving recurring services. **Site Service Charge Batch** is used for sites receiving one-time charges. After a batch is created it will display on the Rate Update Batch screen. Color coding is used to identify batch status using the following colors:

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

RATE UPDATE BATCH										SALES > RATE UPDATE BATCHES	
ID	DIVISION	SERVICE REGION	LINE OF BUSINESS	TYPE	CREATED DATE	EFFECTIVE DATE ↑	STATUS	POSTED DATE/ POSTED USER	INC. / EXC.	NOTE	
1002	HOUSTON	PEARLAND MUNICIPAL	Commercial	Service	10/27/21 10:40 am	10/01/21	Posted	10/27/21 10:44 am Jon Smith	1567 / 0	All City of Pearland services are no charge	
1013	HOUSTON	PEARLAND MUNICIPAL		Service	10/03/22 3:37 pm	10/01/22	Posted	10/03/22 3:55 pm Jon Smith	1803 / 943	Pearland Contract PI	
1014	HOUSTON	PEARLAND MUNICIPAL		Svc. Charge	10/03/22 3:39 pm	10/01/22	Posted	10/03/22 3:42 pm Jon Smith	2 / 510	Pearland Contract PI	
1025	HOUSTON			Service	08/16/23 10:49 am	09/02/23	Voided		3 / 0	test status	
1028	HOUSTON	ATASCA OAKS, ATASCA WOODS, ATASCOCITA NORTH, CORPUS OPEN	Commercial, Document Destruction, Hazardous Material, Landfill,	Service	09/15/23 5:33 pm	09/15/23	Open		1 / 0		

Permissions

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

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

Filter Fields

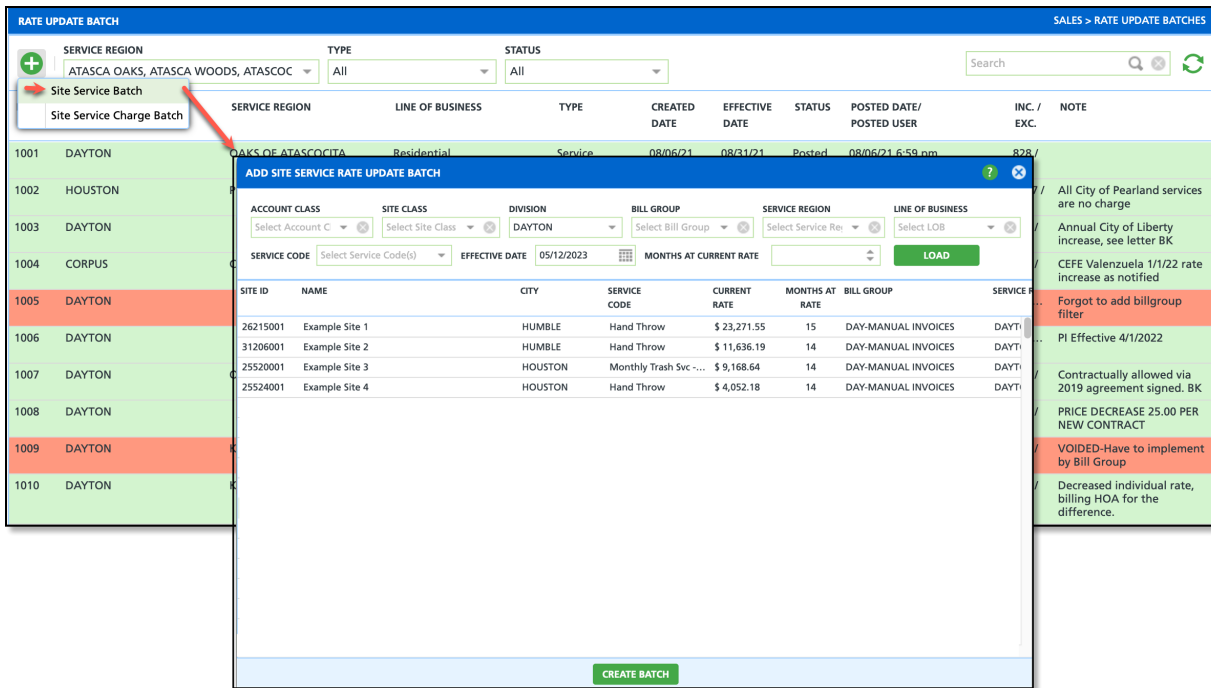
Filter options are available and limit what displays on the screen.

Filter Types	Description
Service Region	Limits the search by Service Region.
Type	Filters to the types of batches previously created. Options include: Site Service Batch or Site Service Charge Batch.
Status	Filters to Open, In Progress, Error, Posted or Voided batches.

Create a Site Service Batch

Site Service Batch is used to create a batch of sites receiving recurring services. After a batch is created, rates can be updated by either a percentage or an entered value amount.

1. Click on the + icon in the upper left corner of the screen.
2. Select Site Service Batch to open the 'Add Site Service Rate Update Batch' screen.



Field Descriptions: Site Service Batch

Filter fields in Site Service Batch are used to locate and include only sites matching the selected filter parameters in the batch.

Filter Type	Description
Account Class	Filters to only include sites belonging to the selected Account Class.
Site Class	Filters to only include sites belonging to the selected Site Class.
Division	Filters to only include sites belonging to the selected Division.
Bill Group	Filters to only include sites belonging to the selected Bill Group.
Service Region	Filters to only include sites belonging to the selected Service Region.
Line Of Business	Filters to only include sites belonging to the selected Line of Business.
Service Code	Filters to only include sites that have the selected Service Code applied.
Effective Date	Looks at the effective date of the Service Code to determine batch eligibility for a site.

Filter Type	Description
Months At Current Rate	Looks at the length of time the service code has had the current rate to determine batch eligibility for a site.

Create a Site Service Charge Batch

Site Service Charge Batch is used to create a batch of sites receiving one time charges; this includes on call orders and manual charges. After a batch is created, rates are updated by either a percentage or an entered value amount.

1. Click on the + icon in the upper left corner.
2. Select **Site Service Charge Batch** to open the 'Add Site Service Charge Rate Update Batch' screen.

Field Descriptions: Site Service Charge Batch

Filter fields in Site Service Charge Batch are used to locate and include only the sites matching the selected filter parameters in the batch.

Filter Fields	Descriptions
Account Class	Filters to only include sites belonging to the selected Account Class.
Site Class	Filters to only include sites belonging to the selected Site Class.
Division	Filters to only include sites belonging to the selected Division.
Bill Group	Filters to only include sites belonging to the selected Bill Group.
Service Region	Filters to only include sites belonging to the selected Service Region.
Line Of Business	Filters to only include sites belonging to the selected Line of Business.
Charge Code	Filters to only include sites that have the selected Charge Code applied.

Filter Fields	Descriptions
Effective Date	Looks at the effective date of the Charge Code to determine batch eligibility for a site.
Months At Current Rate	Looks at the length of time the charge code has had the current rate to determine batch eligibility for a site.

Related Articles:

[Rate Update Batch - Apply A New Rate](#)
