

Rate Update Batch (Sales) - Enhancements and Additions to Screen and Batch Creation (18480)

Last Modified on 06/02/2025 10:39 am PDT

The following enhancements have been made to the Rate Update batch screen:

Rate Update Batch (Main Screen)

- 1. Removal of Columns:
 - Division
 - Service Region
 - Line of Business
- 2. Addition of Columns:
 - Filter
 - Net Variance
- 3. Updated Columns
 - Created Date / Created User

RATE UPDATE BATCH										SALES - RATE UPDATE BATCHES	
TYPE		STATUS		DIVISION							
All		All		QAWASTE, CORPUS, DAYTON, HOUSTON,							
ID	FILTER	TYPE	CREATED DATE/ CREATED USER	EFFECTIVE DATE	STATUS	POSTED DATE/ POSTED USER	INC / EXC.	NOTE		NET VARIANCE	
1001	1. Site Division in (DAYTON) 2. Service Region in (OAKS OF ATASCOCITA) 3. Line of Business in (Residential)	Service	08/06/21 6:57 pm John Smith - IT & Reporti...	09/01/21	Posted	08/06/21 6:59 pm John Smith - IT & Reporti...	0 / 821				
1002	1. Site Division in (HOUSTON) 2. Service Region in (PEARLAND MUNICIPAL) 3. Line of Business in (Commercial)	Service	10/27/21 10:40 am John Smith - IT & Reporti...	10/01/21	Posted	10/27/21 10:44 am John Smith - IT & Reporti...	0 / 0	All City of Pearland services are no charge			
1003	1. Site Division in (DAYTON) 2. Line of Business in (Commercial)	Service	12/31/21 9:34 am Bill Jones - VP (Operations)	01/01/22	Posted	12/31/21 9:52 am Bill Jones - VP (Operations)	0 / 0	Annual City of Liberty increase, see letter BK			
1004	1. Site Division in (CORPUS) 2. Service Region in (CORPUS OPEN MARKET) 3. Line of Business in (Roll OHT)	Svc. Charge	01/02/22 10:29 am Bill Jones - VP (Operations)	01/01/22	Posted	01/02/22 10:36 am Bill Jones - VP (Operations)	0 / 0	CEFE Valenzuela 1/1/22 rate increase as notified			
1005	1. Site Division in (DAYTON)	Service	02/28/22 2:58 pm Bill Jones - VP (Operations)	04/01/22	Voided		13460 / 0	Forgot to add billgroup filter			
1006	1. Site Division in (DAYTON)	Service	02/28/22 3:01 pm Bill Jones - VP (Operations)	04/01/22	Posted	03/07/22 11:37 am John Smith - IT & Reporti...	0 / 0	PI Effective 4/1/2022			
1007	1. Site Division in (DAYTON) 2. Service Region in (OAKS OF ATASCOCITA)	Service	05/06/22 12:15 pm Bill Jones - VP (Operations)	06/01/22	Posted	05/06/22 12:31 pm Bill Jones - VP (Operations)	0 / 0	Contractually allowed via 2019 agreement signed. BK			
1008	1. Site Division in (DAYTON)	Service	06/29/22 5:03 pm Barbara Jones - Office Ma...	07/01/22	Posted	07/05/22 5:43 pm David Navarro - Admin-N...	0 / 0	PRICE DECREASE 25.00 PER NEW CONTRACT			
1009	1. Site Division in (DAYTON) 2. Service Region in (KINGWOOD GREENS)	Service	07/27/22 9:25 am John Smith - IT & Reporti...	07/01/22	Voided		400 / 0	VOIDED-Have to implement by Bill Group			
1010	1. Site Division in (DAYTON) 2. Service Region in (KINGWOOD GREENS)	Service	07/27/22 1:31 pm John Smith - IT & Reporti...	07/01/22	Posted	07/27/22 1:37 pm John Smith - IT & Reporti...	0 / 0	Decreased individual rate, billing HOA for the difference.			
1011	1. Site Division in (DAYTON)	Service	08/13/22 9:40 am John Smith - IT & Reporti...	07/01/22	Voided		0 / 663	Failed to Exclude Other Cities			
1012	1. Site Division in (DAYTON)	Service	08/13/22 11:58 am John Smith - IT & Reporti...	07/01/22	Posted	08/13/22 12:07 pm John Smith - IT & Reporti...	0 / 0	Dayton PI-10%-Effective 7/1/22			

ADD SITE SERVICE RATE UPDATE BATCH

ADD FILTER

EFFECTIVE DATE

LOAD

SITE ID	NAME	CITY	SERVICE CODE	CURRENT RATE	MONTHS AT RATE	BILL GROUP	NEXT INVOICE DATE
<div><div>ADD NEW FILTER</div><div><div>FILTER</div><div>Account Class</div><div>in</div><div>COMMERCIAL</div></div><div>SAVE</div></div>							

CREATE BATCH

Create a New Batch

Both batch creation options require using the "Add Filter" feature to narrow the batch to a specific set of sites. While this filter functions similarly to the Database Query filter, it does not support grouping conditions with AND/OR logic.

Reverse a Batch

An option to reverse a batch has been added, along with the following logic to prevent a reversal in certain cases:

- The service change has a work order marked as "Completed" or "Posted."
- The service has already been billed.
- The service has been edited since the batch was created.
- The service has a future-dated change.

The Reverse button is only displayed when the batch is in a **Posted** status.

SITE SERVICE RATE UPDATE BATCH: 1002

Total Count: 1,567 (1,567 Visible) / Reversed: 1,567 (-7,393.32 Net Variance)

GRID VIEW

EFFECTIVE DATE

Standard

10/01/2021

Search

SITE ID	SITE NAME	CITY	SERVICE ID	SERVICE CODE	CURRENT RATE	NEW RATE	VARIANCE	CURRENT WO MINIMUM
<input type="checkbox"/>	43178052 H&R BLOCK	PEARLAND	21142	2 Yard Trash Service	\$ 68.12			
Rate update was reversed								
<input type="checkbox"/>	43178057 BURLINGTON COAT FACTORY	PEARLAND	21147	8 Yard Trash Service	\$ 331.25			
Rate update was reversed								
<input type="checkbox"/>	43178023 KRISPY KREME	PEARLAND	26991	Enclosure	\$ 38.97			
Rate update was reversed								
<input type="checkbox"/>	43178060 JIFFY LUBE 2781 PEARLAND	PEARLAND	21150	6 Yard Trash Service	\$ 196.23			
Rate update was reversed								
<input type="checkbox"/>	43178042 JIFFY LUBE 899 PEARLAND	PEARLAND	21133	6 Yard Trash Service	\$ 119.08			
Rate update was reversed								
EXPORT REVERSE								

EXPORT

REVERSE

Total Count Updates

The total count has been moved to display at the top of the grid, whereas it was previously shown below it.

SITE SERVICE CHARGE RATE UPDATE BATCH: 1020					
Total Count: 951 (951 Visible) / Included: 4 (-185.00 Net Variance) / Unchanged: 1					
GRID VIEW		CHANGE TYPE		AMOUNT	
Standard		%		3.5000	
		APPLY		EFFECTIVE DATE	
				02/02/2024	
<input type="checkbox"/>	SITE ID	SITE NAME	CITY	SERVICE ID	CHARGE CODE
<input checked="" type="checkbox"/>	32875007	TX DOT - GOLIAD	Goliad	33650	Roll Off Haul
<input checked="" type="checkbox"/>	32875010	TX DOT - REFUGIO	REFUGIO	33656	Roll Off Haul

Pathway: Sales > Rate Update Batches