Example of a Company Rate Change Excluding Accounts

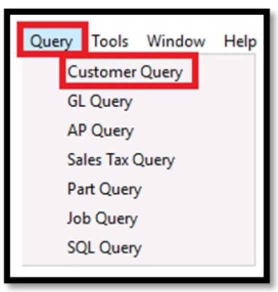
09/13/2024 4:55 pm EDT

Below are the steps to output the accounts that are to be excluded in a Company Rate Change.

- ***Always backup data before running any rate increases and it is a best practice to do testing of any rate change in the Sandbox first.***

Steps:

1. Customer QueryBuilder List
2. Click on Query – Customer QueryBuilder



3. When the window opens – double-click to select the fields from the left side list to be displayed in Frame 1 – then Left click on each field to be Dragged and Dropped into Frame 2 and Frame 3 as shown below:

Fields Selected:

Customer – Customer_Number

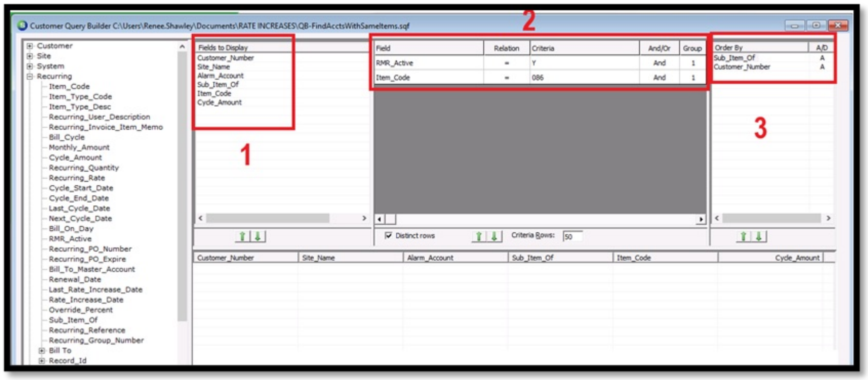
Site – Site_Name

System – Alarm_Account

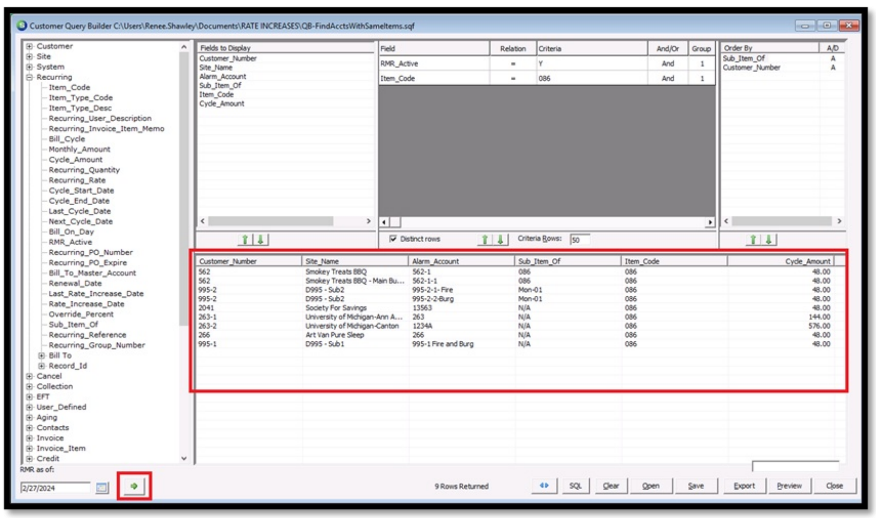
Recurring – Sub_Item_Of

Recurring – Item_Code

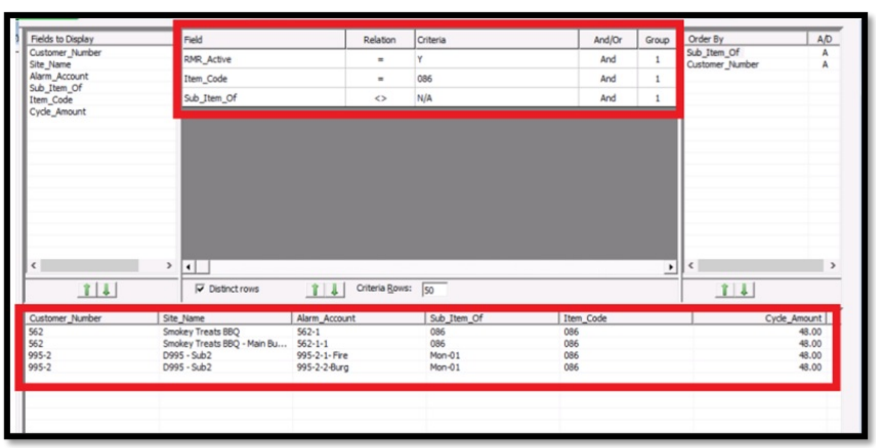
Recurring – Cycle_Amount



4. Click on the Green Arrow to display the rows after all fields are selected – this will show all of the Customer Accounts with the Item Code to be increased and will order the rows by Sub_Item_Of, then Customer as shown below:



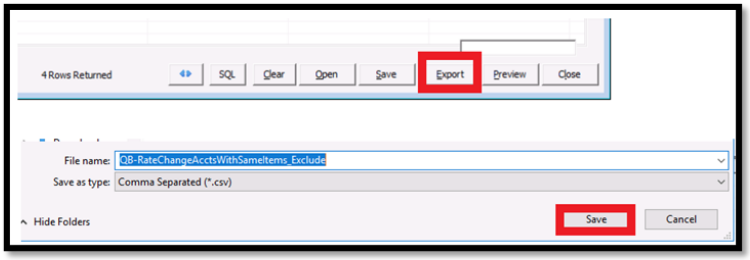
5. Notate each Sub_Item_Of that shows the item more than once per customer
6. Drag and Drop Sub_Item_Of from the list on the left and add to Frame 2 – Select Relation <> N/A as shown below:



- Then only the actual Sub_Item_Of that is listed for Item_Code needed will then display and not the N/A

7. Save the output by Clicking on Export Button at bottom of the window – Pick the path and folder where to save

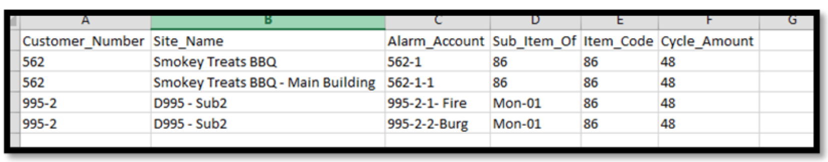
data – Save as a .csv file



8. Click OK after confirmation Export Complete

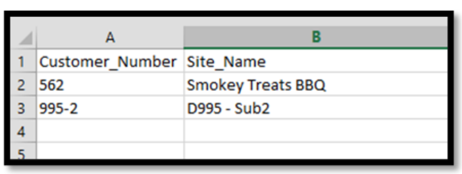
9. Managing CSV file for Import

10. Open the CSV file that was exported into Excel



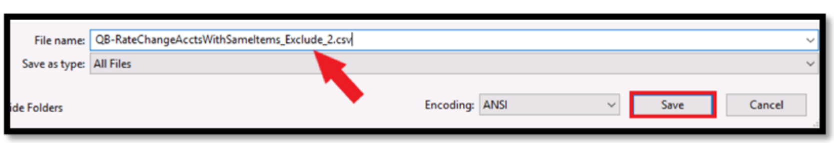
Customer_Number	Site_Name	Alarm_Account	Sub_Item_Of	Item_Code	Cycle_Amount
562	Smokey Treats BBQ	562-1	86	86	48
562	Smokey Treats BBQ - Main Building	562-1-1	86	86	48
995-2	D995 - Sub2	995-2-1- Fire	Mon-01	86	48
995-2	D995 - Sub2	995-2-2-Burg	Mon-01	86	48

11. Will need to condense the file to only 1 (one) Customer_Number and Site_Name



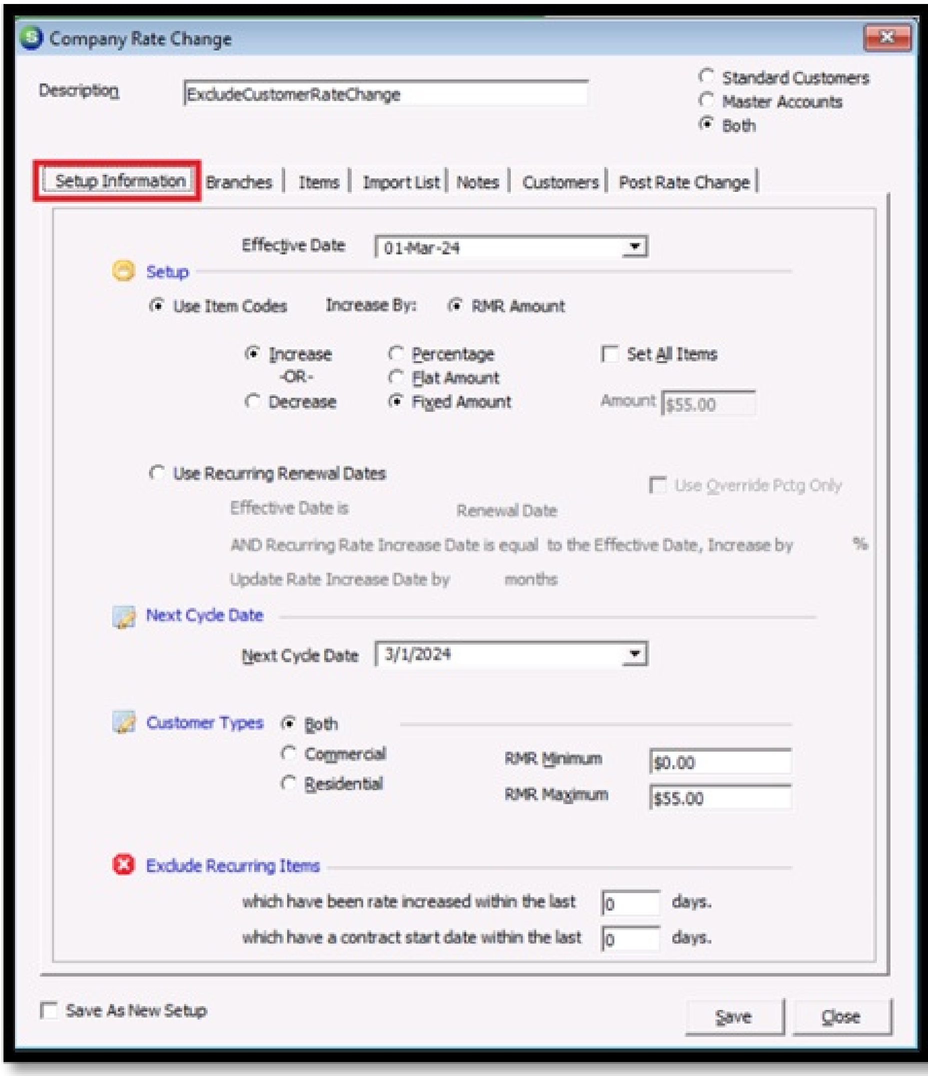
Customer_Number	Site_Name
562	Smokey Treats BBQ
995-2	D995 - Sub2

12. Once completed – save file as the updated CSV file

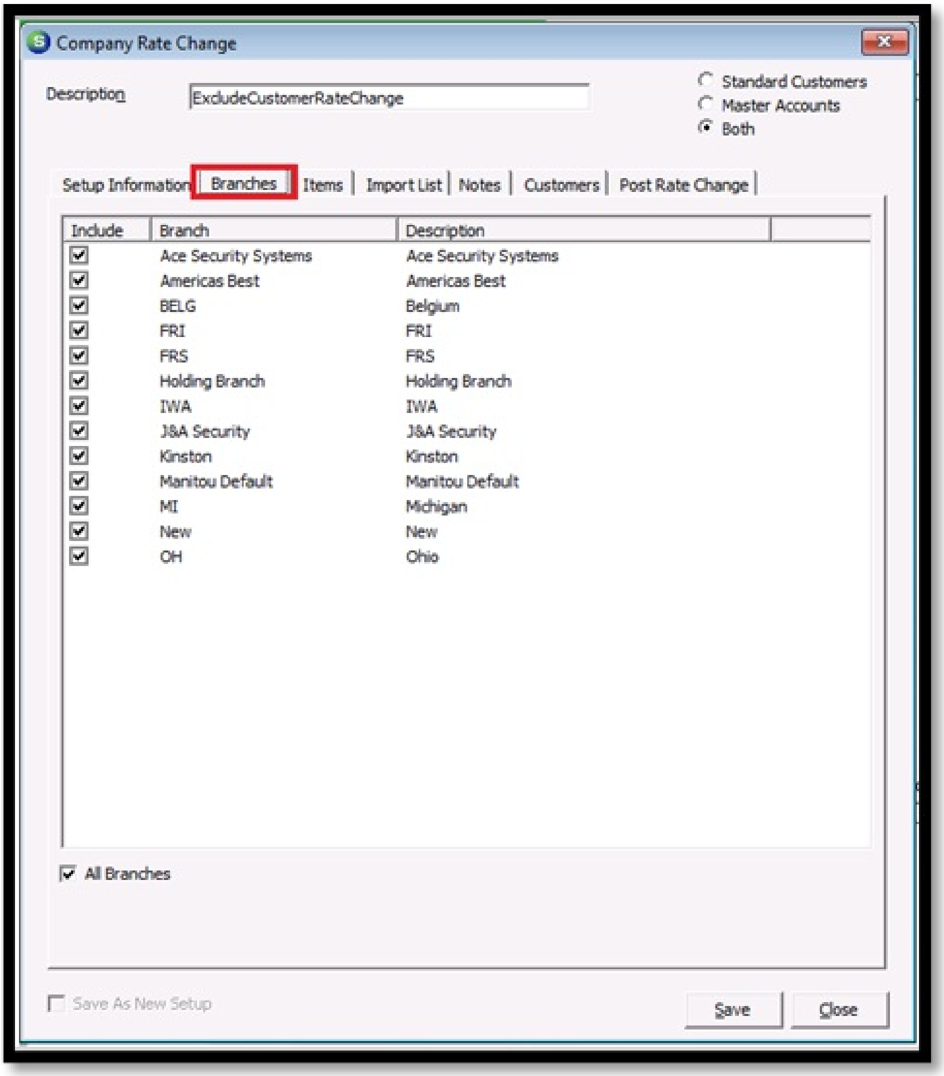


13. Importing List into Company Rate Increase

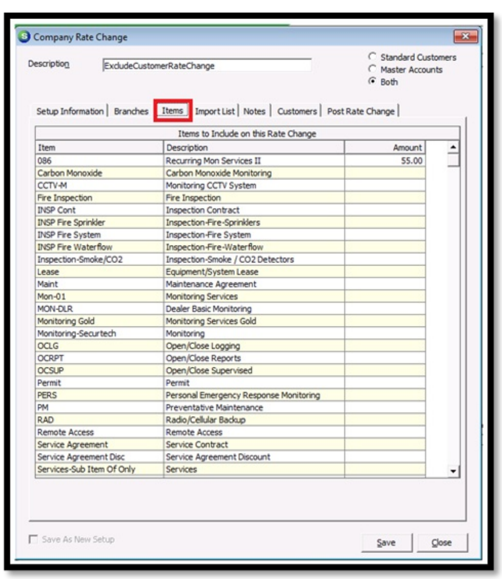
14. Open Company Rate Increase
15. Fill in the Setup Information Tab



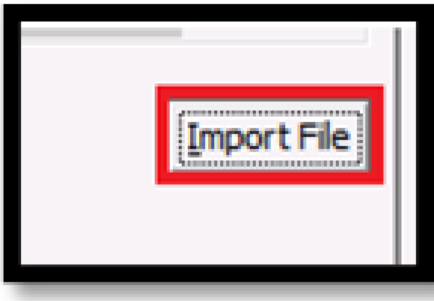
16. Fill in the Branches Tab

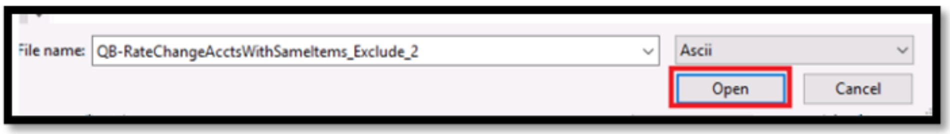


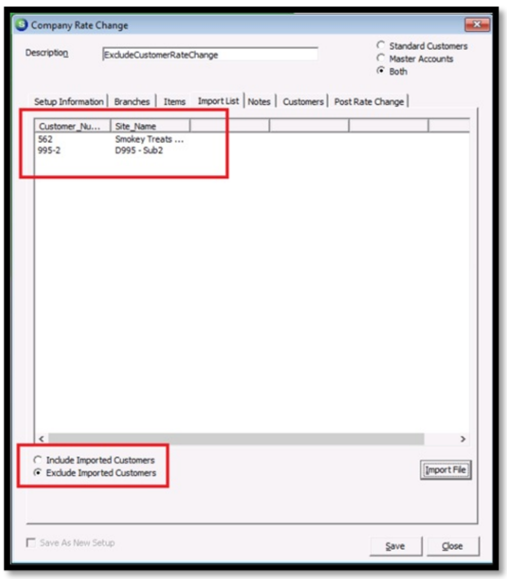
17. Set the Items Amount(s) in the Items Tab



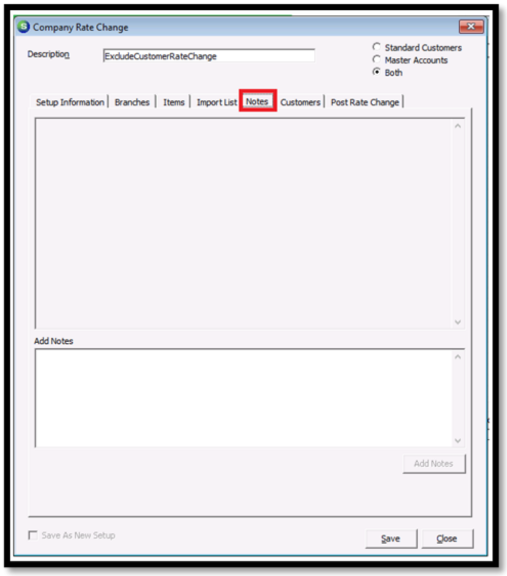
18. In the Import List Tab – Click on Import File – Open the saved condensed file – Click on Exclude Imported Customers after file loads



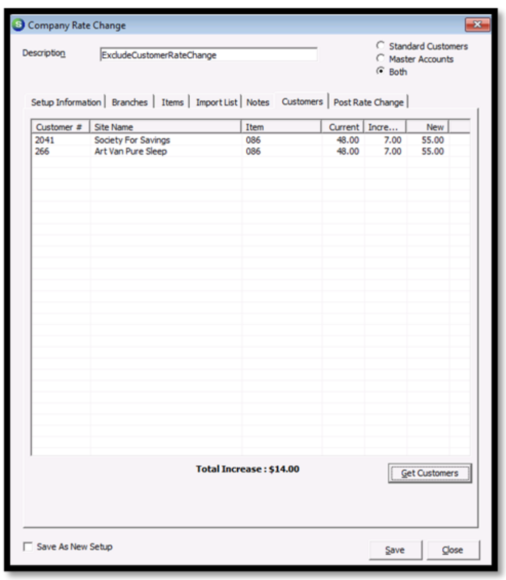




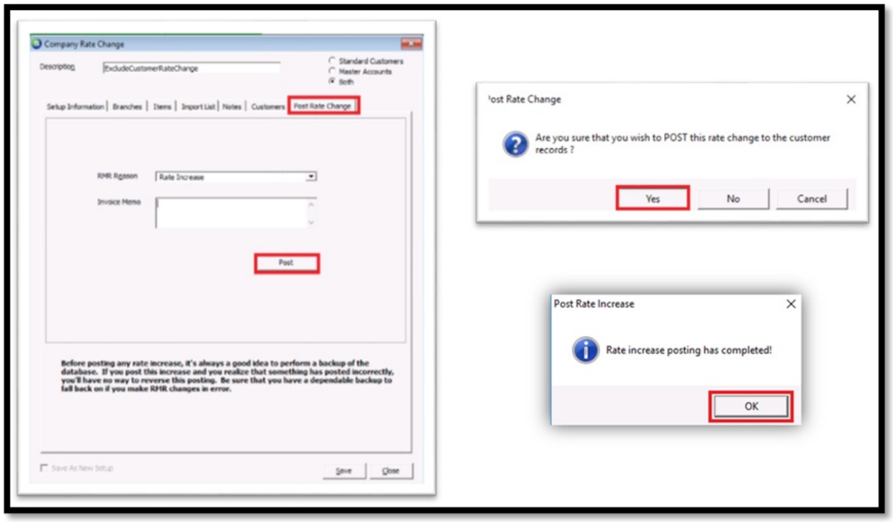
19. Add any notes in the Notes Tab



20. In the Customers Tab – Click on Get Customers – this list should not show any of the customers that are listed in the Import List Tab



Post Rate Change Tab – Fill in RMR Reason – Invoice Memo - Click on Post - Click on Yes to Post - Click on OK Once Complete


Company Rate Change
Description
ExcludeCustomerRateChange
Standard Customers
Master Accounts
Both
Setup Information
Branches
Items
Import List
Notes
Customers
Post Rate Change
RMR Reason
Rate Increase
Invoice Memo
Post
Before posting any rate increase, it's always a good idea to perform a backup of the database. If you post this increase and you realize that something has posted incorrectly, you'll have no way to reverse this posting. Be sure that you have a dependable backup to fall back on if you make RMR changes in error.
Save As New Setup
Save
Close
'ost Rate Change
Are you sure that you wish to POST this rate change to the customer records ?
Yes
No
Cancel
Post Rate Increase
Rate increase posting has completed!
OK