

Example of a Company Rate Change Excluding Accounts

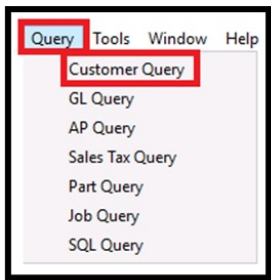
09/13/2024 4:55 pm EDT

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

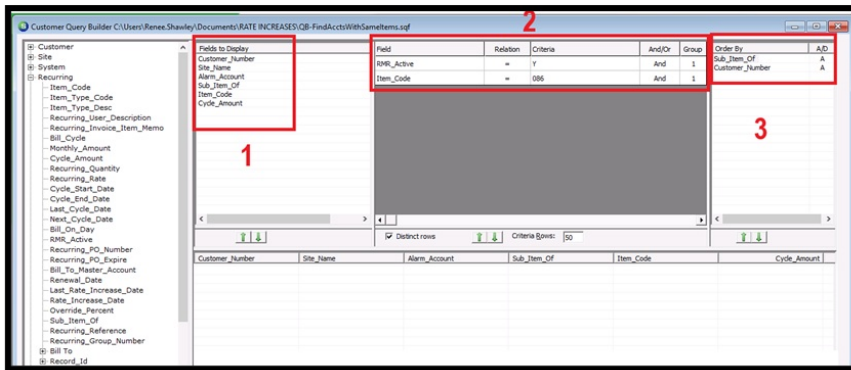
Site – Site_Name

System – Alarm_Account

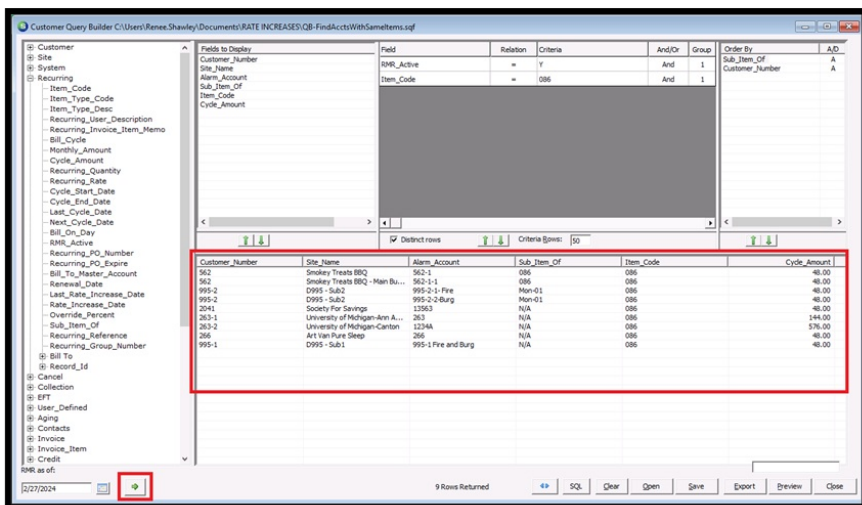
Recurring – Sub_Item_Of

Recurring – Item_Code

Recurring – Cycle_Amount

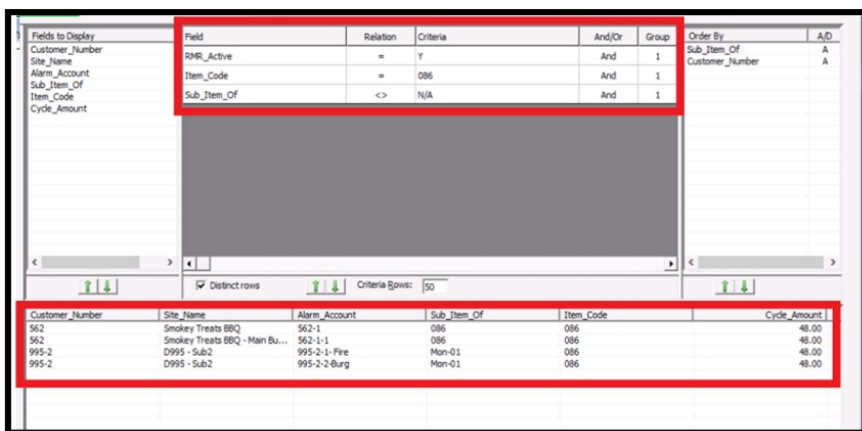


4. Click on the Green Arrow to display the rows after all fields are selected – this will show all of the Customer Accounts with the Item Code to be increased and will order the rows by Sub_Item_Of, then Customer as shown below:



5. Notate each Sub_Item_Of that shows the item more than once per customer

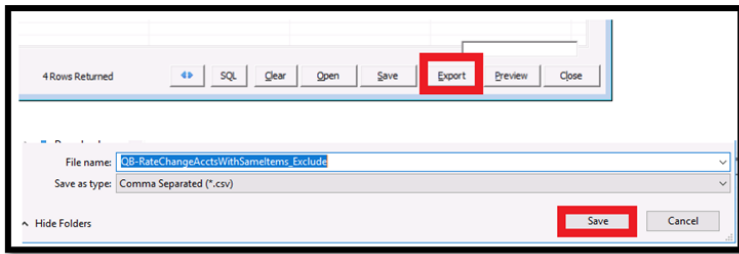
6. Drag and Drop Sub_Item_Of from the list on the left and add to Frame 2 – Select Relation <> N/A as shown below:



- 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

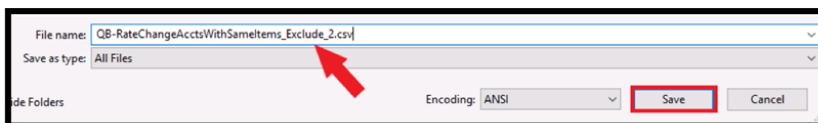
10. Open the CSV file that was exported into Excel

A	B	C	D	E	F	G
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

	A	B
1	Customer_Number	Site_Name
2	562	Smokey Treats BBQ
3	995-2	D995 - Sub2
4		
5		

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

Company Rate Change

Description

ExcludeCustomerRateChange

☐ Standard Customers
☐ Master Accounts
☒ Both

Setup Information

Branches

Items

Import List

Notes

Customers

Post Rate Change

Effective Date

01-Mar-24

Setup

☒ Use Item Codes
 Increase By:
 ☒ RMR Amount

☒ Increase
 -OR-
☐ Decrease

☐ Percentage
☐ Flat Amount
☒ Fixed Amount

☐ Set All Items
 Amount \$55.00

☐ Use Recurring Renewal Dates

☐ Use Override Pctg Only

Effective Date is

Renewal Date

AND Recurring Rate Increase Date is equal to the Effective Date, Increase by

%

Update Rate Increase Date by

months

Next Cycle Date

Next Cycle Date

3/1/2024

Customer Types

☒ Both
☐ Commercial
☐ Residential

RMR Minimum

\$0.00

RMR Maximum

\$55.00

Exclude Recurring Items

which have been rate increased within the last

0

days.

which have a contract start date within the last

0

days.

☐ Save As New Setup

Save

Close

16. Fill in the Branches Tab

Company Rate Change

Description:

☐ Standard Customers
☐ Master Accounts
☒ Both

Setup Information | **Branches** | Items | Import List | Notes | Customers | Post Rate Change

Include	Branch	Description
☒	Ace Security Systems	Ace Security Systems
☒	Americas Best	Americas Best
☒	BELG	Belgium
☒	FRI	FRI
☒	FRS	FRS
☒	Holding Branch	Holding Branch
☒	IWA	IWA
☒	J&A Security	J&A Security
☒	Kinston	Kinston
☒	Manitou Default	Manitou Default
☒	MI	Michigan
☒	New	New
☒	OH	Ohio

☒ All Branches

☐ Save As New Setup

Save Close

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

Company Rate Change

Description:

☐ Standard Customers
☐ Master Accounts
☒ Both

Setup Information | Branches | **Items** | Import List | Notes | Customers | Post Rate Change

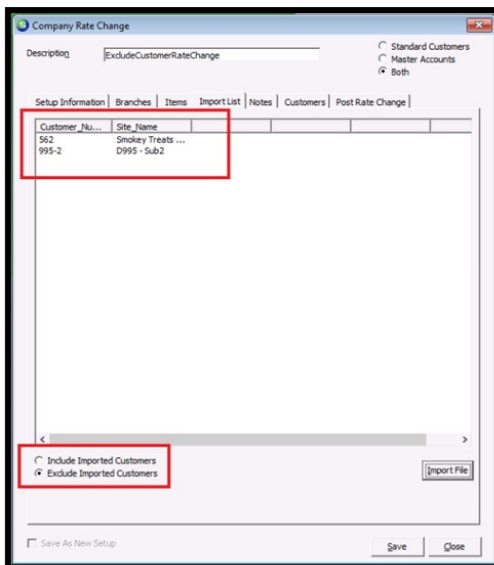
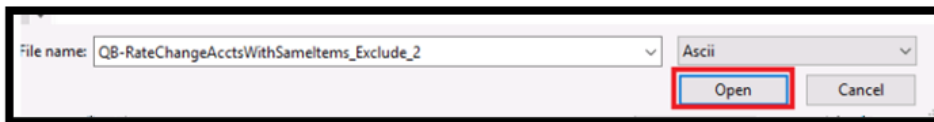
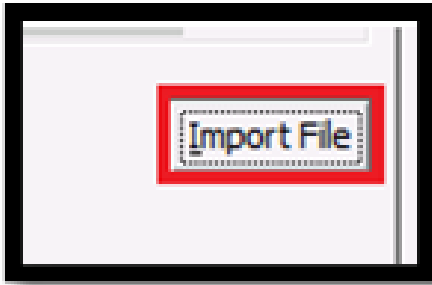
Items to Include on this Rate Change

Item	Description	Amount
086	Recurring Mon Services II	\$5.00
Carbon Monoxide	Carbon Monoxide Monitoring	
CCTV-M	Monitoring CCTV System	
Fire Inspection	Fire Inspection	
INSP Cont	Inspection Contract	
INSP Fire Sprinkler	Inspection-Fire-Sprinklers	
INSP Fire System	Inspection-Fire System	
INSP Fire Water-flow	Inspection-Fire-Waterflow	
Inspection-Smoke/CO2	Inspection-Smoke / CO2 Detectors	
Lease	Equipment/System Lease	
Maint	Maintenance Agreement	
Mon-01	Monitoring Services	
MON-CLR	Dealer Basic Monitoring	
Monitoring Gold	Monitoring Services Gold	
Monitoring-Securtech	Monitoring	
OCLG	Open/Close Logging	
OCSPT	Open/Close Reports	
OCSUP	Open/Close Supervised	
Permit	Permit	
PERS	Personal Emergency Response Monitoring	
PM	Preventative Maintenance	
RAD	Radio/Cellular Backup	
Remote Access	Remote Access	
Service Agreement	Service Contract	
Service Agreement Disc	Service Agreement Discount	
Services-Sub Item Of Only	Services	

☐ Save As New Setup

Save Close

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

Company Rate Change

Description:

☐ Standard Customers
☐ Master Accounts
☒ Both

Setup Information | Branches | Items | Import List | **Notes** | Customers | Post Rate Change

Add Notes

☐ Save As New Setup

Save Close

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

[illegible]

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

