

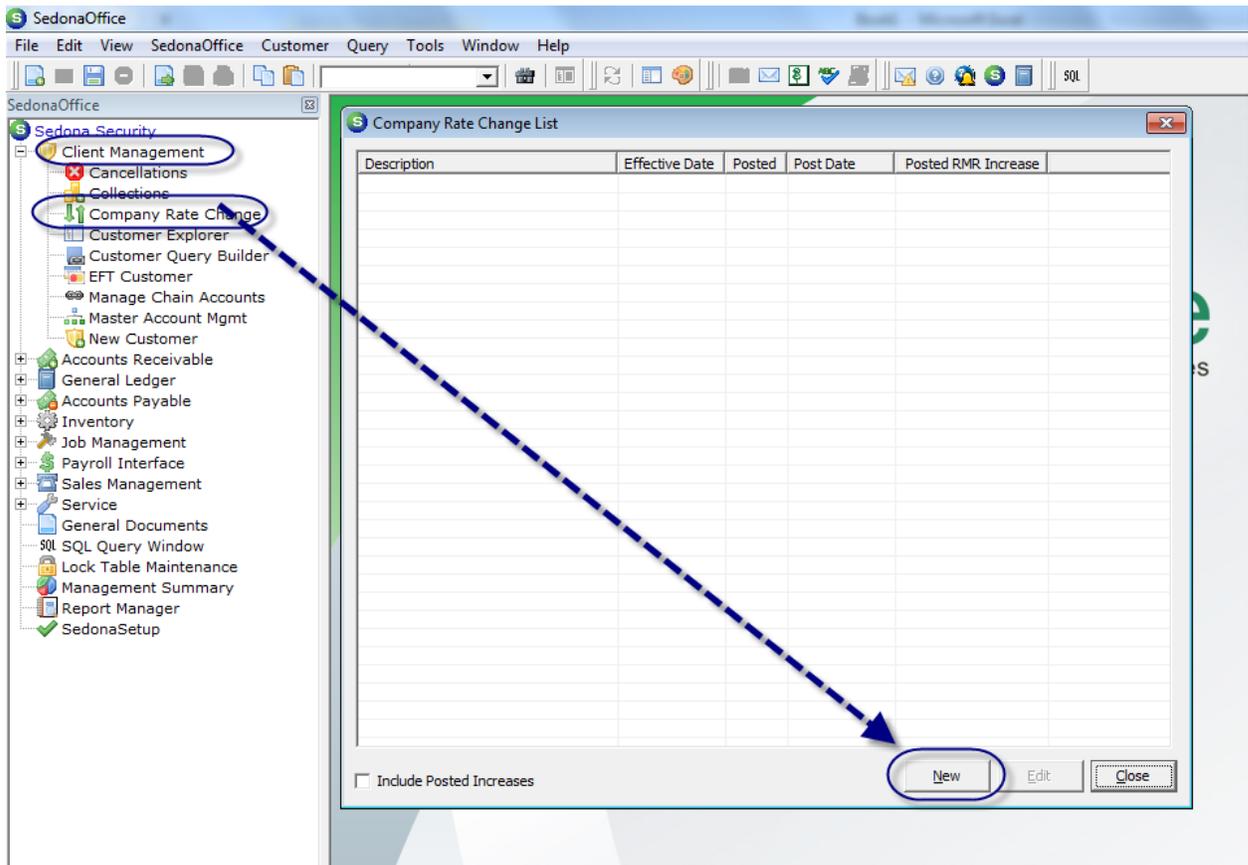
To perform a rate increase on one or more Item Codes for a particular amount, please follow the directions on the following pages.

In the example provided in this document, we will be increase one item code "UL Fees". Customers are currently billed annually \$65.00 for this service. We want to increase this rate to \$85.00 annually.

When using the Company Rate Change option, all increases using the fixed rate increase method consider monthly amounts. In this example, the current monthly rate is \$5.42 ( $\$65.00 / 12$ ). To increase the UL Fee to 85.00 annually, we will increase the monthly amount to \$7.08 ( $\$85.00 / 12$ ).

**Important Note:** Prior to posting and rate change, perform a database backup in the event you made an error and need to roll back your data. It is highly recommended to practice the rate change in your Sandbox Company prior to performing on your live database.

1. From the Client Management Module, select the Company Rate Change option. The Company Rate Change List will be displayed. Click on the *New* button at the lower right to setup the Rate Change Batch.



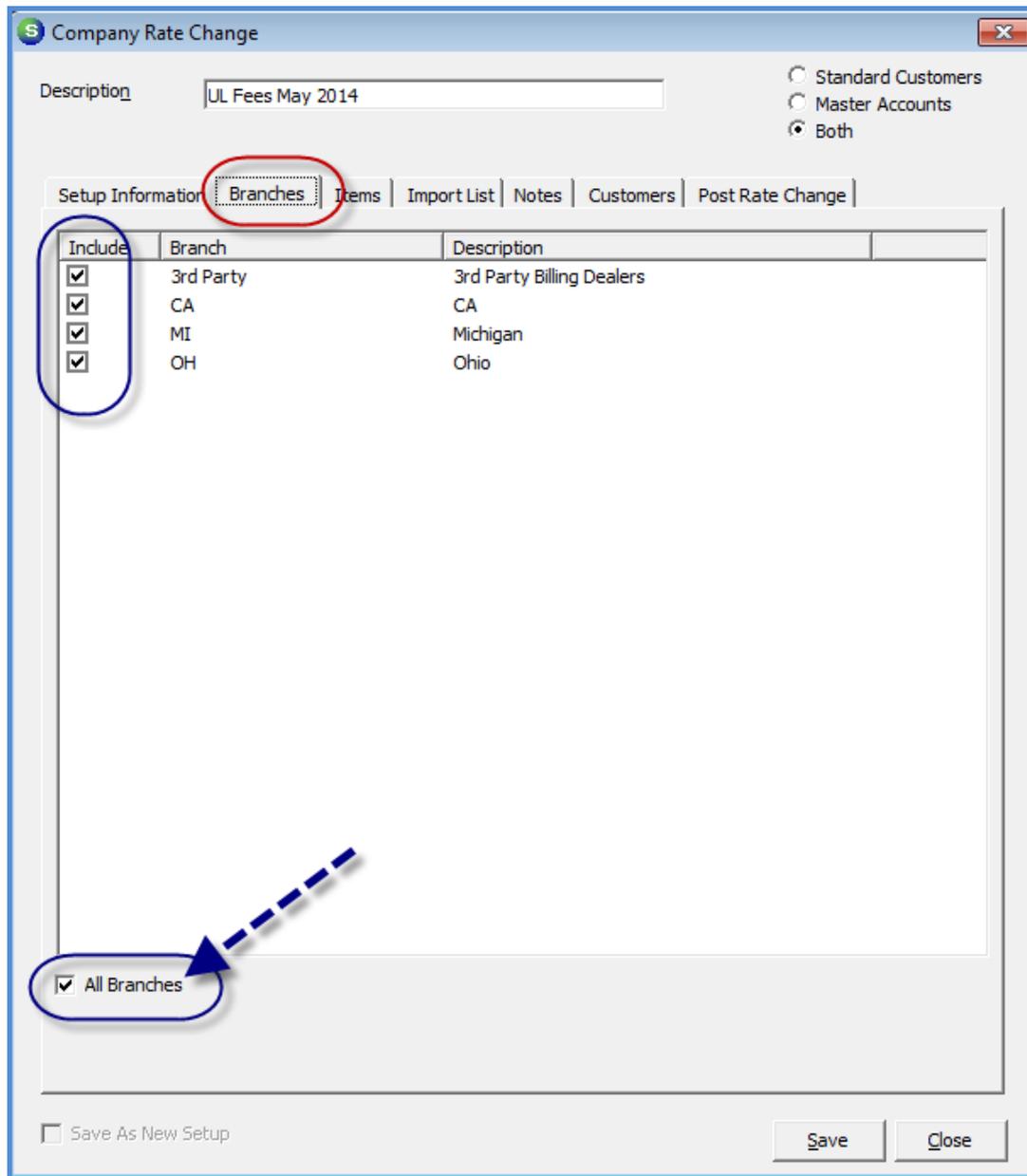
2. On the **Setup Information** Tab, fill in the necessary fields:
  - a. Enter a description for the Rate Increase Batch
  - b. Select the Effective Date – this is when the Rate Increase will go into effect.
  - c. Select the Fixed Amount radio button.
  - d. This field is optional; if a Next Cycle Date is selected, the rate increase will only affect customers recurring lines where the next cycle date is equal to this selection.

When finished, click on the **Branches** Tab.

The screenshot shows the 'Company Rate Change' dialog box with the 'Setup Information' tab selected. The 'Description' field is 'UL Fees May 2014'. The 'Effective Date' is '01-May-14'. Under 'Increase By', 'Fixed Amount' is selected. The 'Next Cycle Date' is '01-May-14'. The 'Customer Types' section has 'Both' selected. The 'Exclude Recurring Items' section has '365' days entered for both criteria.

3. On the **Branches** tab, either check the *All Branches* checkbox or check the box to the left of each Branch to be considered in this Rate Increase Batch.

When finished, click on the **Items** tab.



- On the **Items** tab, we will locate the Item Code we want to increase and enter the amount of \$7.08 in the *Amount* column, which is the new monthly rate.

When finished, click on the **Customers** tab.

Company Rate Change

Description:

Standard Customers  
 Master Accounts  
 Both

Items to Include on this Rate Change		
Item	Description	Amount
3rd Party Digital Monitor	Digital Monitoring	
INSP Cont	Inspection Contract	
INSP Fire Sprinkler	Inspection-Fire-Sprinklers	
INSP Fire System	Inspection-Fire System	
INSP Fire Waterflow	Inspection-Fire-Waterflow	
Installment R	Installment billing	
Lease	Equipment/System Lease	
Maint Agr	Maintenance Agreement	
MON	Monitoring	
Mon-Fire	Monitoring - Fire	
Monitoring	Monitoring Services	
OC LG	Open/Close Logging	
OCRPT	Open/Close Reports	
OCSUP	Open/Close Supervised	
Permit	Permit	
RAD	Radio/Cellular Backup	
SVC CONT	Service Contract	
TSTD	Daily Test	
TSTW	Weekly Test	
UL Fees	UL Fees	7.08
WEB	Web Access	
Wholesale Digital MON	Wholesale Digital Monitoring	

Save As New Setup

- From the **Customers** tab, click on the *Get Customer* button located at the lower right. The grid will fill in with all customers' recurring lines that qualify for the rate increase. If there is a very long list of records displayed, you may want to print this list to review prior to posting the batch. See step 6 on the next page for instructions on how to print/export the list of qualified customer recurring lines.

If it will take some time to review the list, you may click on the *Save* button at the lower right of the Rate Change form and return later to finish with the posting.

Company Rate Change

Description: UL Fees May 2014

Standard Customers  
Master Accounts  
Both

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

Customer #	Site Name	Item	Current	Increase	New
10113	Alexanders Jewellery Co.	UL Fees	5.42	1.66	7.08
10201	Mark Robbins Jewelers	UL Fees	5.42	1.66	7.08
11132	Pires Jewelers	UL Fees	5.42	1.66	7.08
12677	Rubys Jewelers Llc	UL Fees	5.42	1.66	7.08
12677	Rubys Jewelers Llc	UL Fees	5.42	1.66	7.08

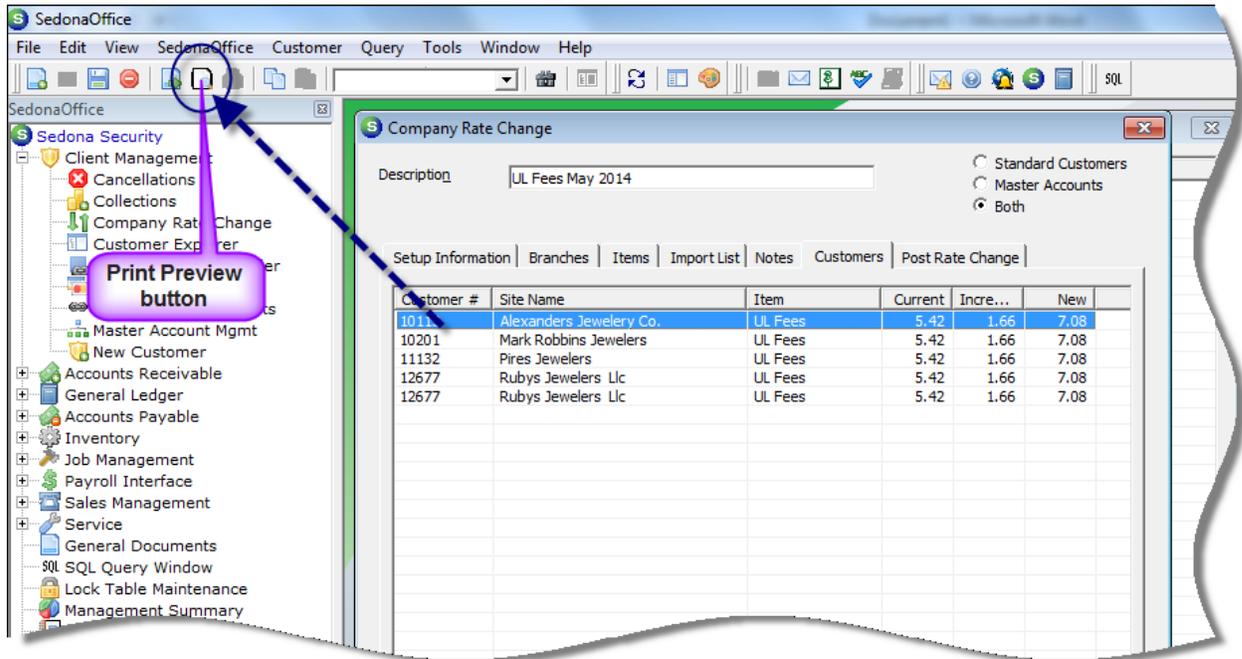
Total Increase : \$8.30

Get Customers

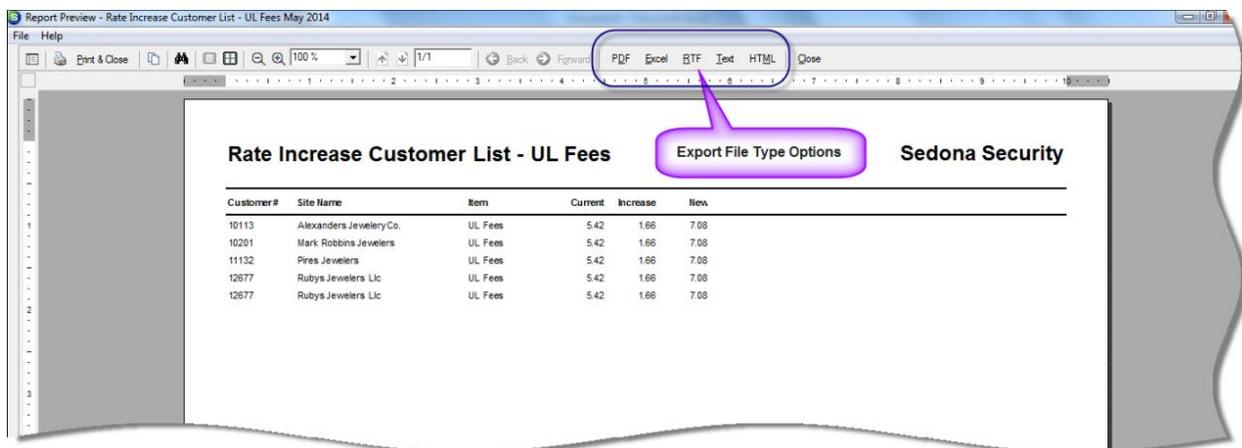
Save As New Setup

Save Close

- To print the list of qualified customer recurring lines for the rate increase, while on the *Customers* tab, click on any recurring line in the list displayed, then click on the Print Preview button on the main application button toolbar.



The report will appear in preview mode. You may print the report to a printer or select one of the export buttons on the Print Preview toolbar.



7. When ready to post the Rate Increase Batch, click on the **Post Rate Change** tab. Select a RMR Reason code from the drop-down list. The Invoice Memo field is optional. Whatever information is entered into this field will print on the customer's next cycle invoice.

Finally, click on the **Post** button. You will receive a warning message making certain you are ready to post the rate change. If you accept, the recurring lines being increased will be marked with an end date and a new recurring line will be created with the new rate with the new effective date.