

Reference Document Company Rate Change Fixed Rate Method

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.

 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 with 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.

S Company Rate Change
Description UL Fees May 2014 C Standard Customers C Master Accounts C Both
Setup Information Branches Items Import List Notes Customers Post Rate Change
Effective Date
(• Use Item Codes Increase By: (• RMR Amount
C Decrease Fixed Amount Amount
C Use Recurring Renewal Dates
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 01-May-14
Customer Types 🙃 Both
C Commercial RMR Minimum
C <u>R</u> esidential RMR Ma <u>x</u> imum
Exclude Recurring Items
which have been rate increased within the last 365 days.
which have a contract start date within the last 365 days.
Save As New Setup



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.

🗿 Company Rate Change	2	
Descriptio <u>n</u> UL Fe	es May 2014	C Standard Customers C Master Accounts C Both
Setup Information Bra	anches] Items Import List Notes Ci	ustomers Post Rate Change
Include Branch ♥ 3rd Party ♥ CA ♥ MI ♥ OH ♥ All Branches	Description 3rd Party Billing De CA Michigan Ohio	valers
Save As New Setup		<u>S</u> ave <u>C</u> lose



4. 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 UL Fees Ma	C Standard Customers C Master Accounts C Both	
	Items to Include on this Pate Change	
Th	Description	
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	
OCLG	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	
		v
🗖 Save As New Setup		Save Close



5. 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.

scription	UL Fees May 2014			O Master Acc	ounts
Customer #	tation Branches Items Impor	Item	Current	Increase	New
10113	Alexanders Jewelery 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
	Tota	al Increase : \$8.30		<u>Get Cus</u>	tomers



6. 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.

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Sedona Security	🎒 Company Rate	2 Change				— ×
🗆 🕖 Client Management					C Stand	ard Customers
🛛 🔀 Cancellations	Description_	UL Fees May 2014			C Maste	r Accounts
Collections					Both Both Contemporate Second Cont	
📲 Company Rat Change						
Customer Exp rer	Cohin Informat		Netes Customore	Deat De	to Change	
Print Preview er	Setup Informat	ion Branches Items Import List	I Notes Customers	Post Ra	ite Change	1
button	Costomer #	Site Name	Item	Current	Incre	New
ts	1011	Alexanders Jewelery Co.	UL Fees	5.42	1.66	7.08
Master Account Mgmt	10201	Mark Robbins Jewelers	UL Fees	5.42	1.66	7.08
New Customer	11132	Pires Jewelers	UL Fees	5.42	1.66	7.08
Accounts Receivable	12677	Rubys Jewelers Llc	UL Fees	5.42	1.66	7.08
General Ledger	12677	Rubys Jewelers Llc	UL Fees	5.42	1.66	7.08
Accounts Payable						
Inventory						
Job Management						
Payroll Interface						
🗄 🚰 Sales Management						
E Zervice						
General Documents						
ốl SQL Query Window						
🔤 Lock Table Maintenance						
Management Summary						

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.

ew - Kate Increase Customer List - UL	Fees May 2014		6				
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Rat	e Increase Custo	mer List - l	JL Fees	(Export	File Type Options	Sedona Security
Custo	ner# Site Name	Item	Current	Increase	New		
10113	Alexanders Jewelery 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 Lic	UL Fees	5.42	1.66	7.08		



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 and end date and a new recurring line will be created with the new rate with the new effective date.

Ompany Rate Change	×
Description UL Fees May 2014	 C Standard Customers C Master Accounts ● Both
Setup Information Branches Items Import List Notes Customer Post Rate Import Register Import List Notes Customer Post Rate Import List Import List Notes Customer Post Import List Import List Notes Customer Post Import List Import List Notes Post Import List Import List Post Post Before posting any rate increase, it's always a good idea to perform a b database. If you post this increase and you realize that something has you'll have no way to reverse this posting. Be sure that you have a dep fall back on if you make RMR changes in error.	ackup of the posted incorrectly, endable backup to
Save As New Setup	Save Close