

SedonaOffice

The #1 Financial Software for Security Companies

Company Rate Change Version 5.1 Reference Guide

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About this Guide

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Document Overview

This document is being provided to explain the Company Rate Change function of SedonaOffice Version 5.1. Contained within this document is the designed functionality, examples of how to use the function, a list of the SedonaSetup tables and/or options, and a list of built-in reports that apply to the Company Rate Change.

Company Rate Change Overview

The Company Rate Change function is used to setup changes to the recurring monthly revenue for your customer accounts. If your company has a provision in its contracts which allows for periodic price increases, this function will provide you with various options of increasing your recurring revenue prices.

The Company Rate Change setup form provides criteria fields from which to select that will determine which customers are eligible for a rate change. You also have the option of importing a list of customer numbers for which you want to apply a rate increase. Rate changes are created and posted in batches and posted to the various customer accounts at one time. The rate change process allows you to experiment with “what if” scenarios to see what the effect of a particular change will have to your revenue without making any changes to the existing recurring lines. Once you have determined when and how you want to post a price change, you have the control of posting the batch at your discretion.

Once a Company Rate Change batch has been posted, the recurring line with the old rate will be cancelled and a new recurring line is created with the new rate and start date. The rate change will be displayed as a new row in the Recurring History list.

Related Setup Tables and Key Data Fields

Below is a list of the setup tables and key data fields impacting this function of the SedonaOffice application.

Setup Tables

- Invoice Items
- Branch
- RMR Reason Codes

Key Data Fields

- Recurring Line – Renewal Date
- Recurring Line – Rate Increase Date
- Recurring Line – Override %

Rate Change Methods

Two basic methods are available for processing rate changes; *Use the Recurring line Renewal Dates* or *Use Item Codes* option from the Company Rate Change form options. Each method looks at various data within your customer records to determine which recurring lines are eligible for a rate change. Each method will be discussed below.

Recurring Renewal Dates Method

The Recurring Renewal Dates method is available in version 5.1 and greater of the SedonaOffice application. When using this method, the Company Rate Change program selects recurring lines based on the information that is saved in fields on the recurring line.

- Renewal (date) – The date the recurring line is eligible for renewal.
- Rate Increase (date) – The date the recurring line is eligible for a rate increase.
- Override % - (optional) – The percentage rate by which the recurring line will be increased. If this value is left at zero, then the percentage entered on the Company Rate Change form will be used to calculate the new recurring rate.

You also have the option of selecting Residential, Commercial or both types of customers. Once a Rate Change batch has posted, the recurring line Renewal date and Rate Increase date will be advanced by the number of months selected in the Company Rate Change form.

When a new Company Rate Change batch is created, you will enter the effective date of when you want the rate change to go into effect. The program has two options based upon the effective date selected in the Company Rate Change form.

1. *Rate Change Effective date is greater than or equal to the Recurring Line Renewal date* and the Recurring Line Rate Increase date is equal to the Rate Change Effective date.

Example: The Rate Change effective date is 09/01/2008. A customer has a recurring line with a renewal date of 07/22/2008 and a Rate Increase date of 09/01/2008. This customer would be included in this rate change batch since the Rate Change Effective date is greater than the recurring line Renewal date and the Rate Increase date is equal to the Rate Change Effective date.

The screenshot shows a software window titled "Recurring Edit 547110". It contains the following information:

- Site and System:** Charlie Hunt, Charlie Lane, Plymouth, MI 48170. System: 547110, Burglar Alarm.
- Panel Type:** (Empty field)
- Recurring Setup | Royalties / Commissions:** (Selected)
- Recurring Information:**
 - Recurring Item: Monitoring
 - Description: (Empty)
 - Sub Item Of: (Empty)
 - Bill Cycle: Monthly
 - Renewal: 7/22/2008
 - Rate Increase: 9/1/2008
 - Override %: 5
 - PO Number: (Empty)

2. *Rate Change Effective date is less than or equal to the Recurring Line Renewal date and the Recurring Line Rate Increase date is equal to the Rate Change Effective date.*

Example: The Rate Change effective date is 10/01/2008. A customer has a recurring line with a renewal date of 11/01/2008 and a Rate Increase date of 10/01/2008. This customer would be included in this rate change batch since the Rate Change Effective date is less than the recurring line Renewal date and the Rate Increase date is equal to the Effective date.

The screenshot shows the 'Recurring Edit 10003' window. The 'Site and System' section lists the customer as Lisa Loeb at 5613 W. Grand River, East Lansing, MI 48824, with system ID 10003 and type 'Burglar Alarm'. The 'Recurring Information' section includes:

- Recurring Item: Monitoring
- Renewal: 11/1/2008
- Description: (empty)
- Rate Increase: 10/1/2008
- Sub Item Of: (empty)
- Override %: 0
- Bill Cycle: Quarterly
- PO Number: (empty)

The screenshot shows the 'Company Rate Change' window with the following configuration:

- Description: Oct 2008- Recurring Renewal Dates
- Effective Date: 01-Oct-08
- Setup options:
 - Use Item Codes:
 - Increase -OR- Decrease
 - Percentage -OR- Flat Amount
 - Set All Items: (unchecked)
 - Amount: (empty)
 - Use Recurring Renewal Dates:
 - Effective Date is: <
 - Renewal Date
 - AND Recurring Rate Increase Date is equal to the Effective Date, Increase by: 5 %
 - Update Rate Increase Date by: 12 months
 - Customer Types:
 - Commercial: (unchecked)
 - Residential: (unchecked)
 - Both: (checked)
 - RMR Minimum: (empty)
 - RMR Maximum: (empty)
 - Exclude Recurring Items:
 - which have been rate increased within the last: 365 days.
 - which have a contract start date within the last: 365 days.
- Buttons: Save As New Setup (unchecked), Save, Close

Item Codes Method

Using the Item Codes method on the Company Rate Change form provides several options of selecting which customer recurring lines to include in the rate change batch. You may select to perform either a rate increase or a rate decrease. You may select to increase (or decrease) recurring rates by a flat dollar amount or by percentage rate. Other options are to include recurring lines with a minimum monthly amount and/or a maximum monthly amount. You may select customer types of Residential or Commercial or both customer types.

Another new option is to import a list of customer numbers from a .csv file. This imported customer list may be used as the basis of customers to be included or excluded from the Company Rate Change batch. If using an imported customer list as the basis for including customers, only the customers on the list with eligible recurring lines will be included in the Company Rate Change batch. If selecting the option of excluding customers which are on the imported list, any recurring lines associated with a customer on the list will be excluded from the Company Rate Change batch.

With the Item Codes method, the program selects recurring lines based on certain data stored at the customer and system and recurring line levels.

- Customer – OK To Increase date
- System – OK To Rate Increase After date
- System – Contract Date
- Recurring Line – Renewal (date)
- Recurring Line – Rate Increase (date)
- Recurring Line – Invoice Item

Once the Invoice Items to be increased have been selected from the Items form of the Company Rate Change form, you will proceed to the Customers form and press the Get Customers button. Pressing Get Customers button triggers the Company Rate Change program runs through a series of date checks to determine which recurring lines are eligible for a rate change. Only recurring lines with an Invoice Item selected for an increase that meet the date rules below will be displayed on the Customer List and are eligible for a rate change.

1. **Prior Rate Increases:** Determine which recurring line to exclude based on the values entered in the *Exclude Recurring Items* section of the Company Rate Change form – Exclude recurring lines based on prior rate increases. Recurring lines that have been increased using the Company Rate Change program within the number of days specified will be excluded.
2. **Contract Start Date:** Determine which recurring line to exclude based on the values entered in the *Exclude Recurring Items* section of the Company Rate Change form – Exclude recurring lines based the contract start date. The contract start date exclusion formula subtracts the number of days from the Company Rate Change Effective; if the contract start (System record) date is greater than this calculated date, the recurring line will be excluded.

3. **Customer OK To Increase Date:** If the customer OK To Increase date is blank, less than or equal to the Company Rate Change Effective date, the customer meets this check and proceeds to the next check to determine eligibility for a rate increase. If the customer has no active recurring lines, it will be excluded from the eligible list.
4. **System OK To Increase After Date:** If the System OK To Increase After Date is blank, less than or equal to the Company Rate Change Effective date, the system meets this check and proceeds to the next check to determine eligibility for a rate increase.
5. **Recurring Line Rate Increase Date:** If the recurring line Rate Increase date is blank, less than or equal to the Company Rate Change Effective date, and the recurring line Invoice Item code is on the list of Items to rate change, the recurring line will be included in the Customer list of eligible recurring to rate change.
6. **Recurring Line Renewal Date:** If the recurring line Renewal date is blank, less than or equal to the Company Rate Change Effective date, and the recurring line Invoice Item code is on the list of Items to rate change, the recurring line will be included in the Customer list of eligible recurring to rate change.

Once the list is compiled of customer recurring lines which are eligible for a rate change, you may review the list to make any further exclusion determinations. If recurring lines are on the list and you do not want to rate change them, you would need to enter a date in one of the evaluation date fields that would eliminate the customer recurring line(s) from the batch. After making changes to any customer, system or recurring dates, you would then return to the Company Rate Change batch and refresh the customer list.

How to Perform a Rate Change – Recurring Renewal Method

Once you create a new Company Rate Change batch, you may save it and continue working with the batch making changes up until the point the batch has been posted. Once a batch has been posted, no further changes can be made to the batch, however you may view posted batches by selecting the checkbox at the bottom of the Company Rate Change List 'Include Posted Increases'.

Navigate to the Client Management menu and select the Company Rate Change menu option. The Company Rate Change List will be displayed. Press the New button located at the bottom of the form to start a new batch. Once the Company Rate Change Form opens, enter a Description for the batch at the top of the form. Proceed on to the next section, Setup Information.

Setup Information

1. Effective Date – select from the drop-down list the month and year the rate change will become effective.
2. Use Recurring Renewal Dates – select this option button.
 - a. Effective Date is – select from the greater than or less than value.
 - b. Percentage Rate – enter the default percentage rate that will be used to increase recurring lines. If the recurring line has an override percentage, the override percentage rate on the recurring line will be used; otherwise the default rate will be used.
 - c. Update Rate Increase Date months – enter the number of months that will be used to update the Rate Increase date and the Renewal date once the rate change batch is posted.
3. Customer Types – select Commercial, Residential or Both. Only customers with the type selected will be eligible for a rate change.
4. Save As New Setup – If this checkbox is selected, the selections made on the Setup Information will be saved and a new Company Rate Change batch is automatically created with the same setup parameters for use as the basis for future rate changes.

The screenshot shows the 'Company Rate Change' window with the following details:

- Description:** Sept 2008 Recurring Renewal Dates
- Navigation:** Setup Information | Branches | Items | Import List | Notes | Customers | Post Rate Change
- Effective Date:** 01-Sep-08
- Setup:**
 - Use Item Codes
 - Increase -OR- Percentage Set All Items
 - Decrease -OR- Flat Amount
 - 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 and Renewal Date by months
- Customer Types:**
 - Commercial RMR Minimum
 - Residential RMR Maximum
 - Both
- Exclude Recurring Items:**
 - Exclude Recurring Items
 - which have been rate increased within the last days.
 - which have a contract start date within the last days.

At the bottom, there is a checked checkbox for 'Save As New Setup', and 'Save' and 'Close' buttons.

Branches

Select which branches to include in the batch. You may check the box All Branches located at the bottom of the form if you evaluate all customer recurring in all branches. You must select at least one branch.

Company Rate Change

Description: Sept 2008 Recurring Renewal Dates

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

Include	Branch	Description
<input checked="" type="checkbox"/>	CA	California
<input checked="" type="checkbox"/>	Charlotte	Charlotte
<input checked="" type="checkbox"/>	Chicago	Chicago
<input checked="" type="checkbox"/>	FL	Florida
<input checked="" type="checkbox"/>	MI	Michigan
<input checked="" type="checkbox"/>	Texas	Texas

All Branches

Save As New Setup

Save Close

Notes

The Notes form is provided to track information regarding this rate change batch. Notes are permanent and may not be modified or deleted once saved. To enter a new note, type the note into the lower tier of the Notes form. Each note may be up to 256 characters long. When finished, press the Add Notes button located at the bottom of the form to save. Notes can be added at any time up until the time the batch is posted.

The screenshot shows a software window titled "Company Rate Change". At the top, there is a "Description" field containing the text "Sept 2008- Recurring Renewal Dates". Below this is a tabbed interface with the following tabs: "Setup Information", "Branches", "Items", "Import List", "Notes", "Customers", and "Post Rate Change". The "Notes" tab is currently selected. It contains a large text area with the text: "All branches for Sept annual increase. Price Increase letters to be mailed out on 07/25/2008." Below this text area is another section labeled "Add Notes" with a smaller text area containing the text: "Rate increase list approved by president on 7/17/2008." At the bottom right of the "Add Notes" section is a button labeled "Add Notes". At the bottom left of the window is a checkbox labeled "Save As New Setup". At the bottom right are two buttons labeled "Save" and "Close".

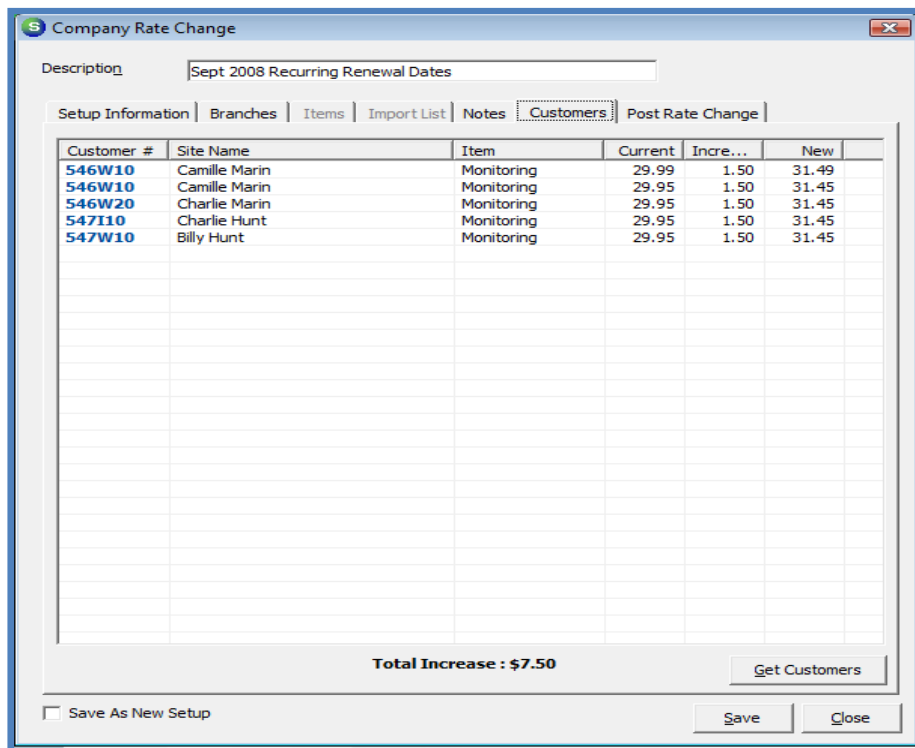
Customers

Once all selections have been made on the Setup Information form and branch selections have been made on the Branches form, navigate to the Customers form and press the Get Customers located at the bottom right.

The Customers form displays the customer number, site name, the Invoice Item code, the current monthly rate, the amount the recurring will be increased and a column displaying the new monthly rate that will go into effect if the batch is posted. A total of all proposed rate increases is displayed at the bottom of the form.

A list of all recurring lines will be listed that are eligible for a rate increase according to your selection criteria from Setup Information and branch selections. You may review the list to make any further exclusion determinations. If recurring lines are on the list and you do not want to rate change them, you would need to enter a date in one of the evaluation date fields that would eliminate the customer recurring line(s) from the batch. After making changes to any customer, system or recurring dates, you would then return to this customer form and press the Get Customers button to refresh the list. You may do this as many times as you desire until you have the desired list of customer recurring lines to rate increase.

Once you are satisfied with the results and are ready to post the rate increases, proceed to the *Post Rate Change* form.



Post Rate Change

Important Note

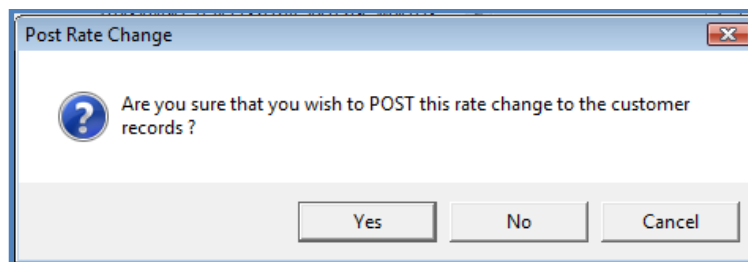
You must first perform a backup of your database BEFORE posting the Rate Increase batch. Once a Rate Increase batch has been posted, it cannot be reversed. If you post a batch and immediately find you have made an error, you will be able to restore your database to the original condition with your database backup.

Once a Rate Change Batch has been posted, it Cannot be reversed.

Company Rate Change batches should be posted *after* the cycle invoicing has been posted for the month prior to the Effective of the rate change. For example, if the Rate Change Effective date is 09/01/2008, do not post the batch until the August 2008 cycle invoicing batch(s) have been posted.

After making a backup copy of your database, you will be ready to post the batch. Posting the batch will mark the end date each recurring line being increased to one day prior to the Effective date of the Rate Change. The program then creates a new recurring line with the new rates that were posted.

1. RMR Reason – You must select a RMR Reason code from the drop-down list. Typically the Rate Increase reason code is selected.
2. Invoice Memo (optional) – You have the option of creating an invoice memo that will print on the next cycle invoice for all of the customers in the Company Rate Change batch being posted.
3. Post – Once an RMR reason code has been selected and the invoice memo has been entered (optional), press the Post button located in the center of the form. After pressing the post button, a message will be displayed confirming you are ready to post; press the Yes button to proceed with the posting process.



Company Rate Change

Description: Sept 2008- Recurring Renewal Dates

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

RMR Reason: Rate Increase

Invoice Memo: This invoice reflects a rate increase which is allowable according to the terms of your contract.

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

How to Perform a Rate Change – Item Codes Method with Percentage Increase

This method describes how to setup and post a Company Rate Change batch using either one specific percentage rate or various rates for different Invoice Item codes.

Once you create a new Company Rate Change batch, you may save it and continue working with the batch making changes up until the point the batch has been posted. Once a batch has been posted, no further changes can be made to the batch, however you may view posted batches by selecting the checkbox at the bottom of the Company Rate Change List 'Include Posted Increases'.

Navigate to the Client Management menu and select the Company Rate Change menu option. The Company Rate Change List will be displayed. Press the New button located at the bottom of the form to start a new batch. Once the Company Rate Change Form opens, enter a Description for the batch at the top of the form. Proceed on to the next section, Setup Information.

Setup Information

1. Effective Date – select from the drop-down list the month and year the rate change will become effective.
2. Use Item Codes – select this option button.
 - a. Increase or Decrease – Most typically you will select the Increase button.
 - b. Percentage or Flat Amount – Select the Percentage button.
 - c. Set All Items / Amount – Select the checkbox, select all items, then enter the default percentage rate that will be used to increase recurring lines. If the recurring line has an override percentage, that percentage is ignored when using this method.
3. Customer Types – select Commercial, Residential or Both. Only customers with the type selected will be eligible for a rate change.
4. RMR Minimum – If you only want to include customers with a particular minimum monthly rate, then enter that amount in this field. Example: if you may have some customers for which you charge a very low rate, such as \$1.00 per month and do not want to increase those recurring lines. If you enter \$1.01 as the RMR minimum, those recurring lines less than \$1.01 will be excluded from the batch. You can also use this field in combination with the RMR Maximum amount to include a limited monthly rate range of customer recurring.
5. RMR Maximum – If you only want to include customers with a monthly rate up to a certain amount, then enter that amount in this field. Example: If most of your customers have a monthly rate of 29.95 but a few that are above that amount and you do not want to increase those that are currently above 29.95 per month, then you would enter 29.95 in this field. You can use this field in combination with the RMR Minimum amount to include a limited monthly rate range of customer recurring.
6. Save As New Setup (optional) – If this checkbox is selected, the selections made on the Setup Information will be saved and a new Company Rate Change batch is automatically created with the same setup parameters for use as the basis for future rate changes.

- Exclude Recurring Items - The two fields in this area allow you to exclude customers that have received a rate change or have a contract start date which is within a specified number of days. This allows you to exclude customers that have recently received a rate change or may be a new customer.

The rate increase date exclusion formula subtracts the number of days from the Company Rate Change Effective; if the last increase date is greater than this calculated date, the recurring line will be excluded. When Company Rate Change batches are posted, the recurring line that is being ended by the rate increase program is marked with a last increase date equal to the effective date for the batch. The typical setting for this field is 365 days.

The contract start date exclusion formula subtracts the number of days from the Company Rate Change Effective; if the contract start (System record) date is greater than this calculated date, the recurring line will be excluded. The typical setting for this field is 365 days.

Once all information is filled in, proceed to the Branches setup form.

Company Rate Change

Description: Oct 2008 - Item Code Increases

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

Effective Date: 01-Oct-08

Setup

Use Item Codes

Increase -OR- Percentage Set All Items
 Decrease -OR- Flat Amount Amount: 5.00%

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

Customer Types

Commercial RMR Minimum: \$0.00
 Residential RMR Maximum:
 Both

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 Save Close

Branches

Select which branches to include in the batch. You may check the box All Branches located at the bottom of the form if you evaluate all customer recurring in all branches. You must select at least one branch.

Once the branch selections have been made, proceed to the Items setup form.

Include	Branch	Description
<input checked="" type="checkbox"/>	CA	California
<input checked="" type="checkbox"/>	Charlotte	Charlotte
<input checked="" type="checkbox"/>	Chicago	Chicago
<input checked="" type="checkbox"/>	FL	Florida
<input checked="" type="checkbox"/>	MI	Michigan
<input checked="" type="checkbox"/>	Texas	Texas

All Branches

Save As New Setup

Save Close

Items

The Items form will display a list of all the recurring type Invoice Item codes, their description and an amount column that will automatically be populated with the default percentage rate that was entered on the Setup Information form. If there are Invoice Item codes that you do not want to rate increase, type in the rate of zero for these Items. You may also change the rate on any Item code to any percentage rate less than the default percentage rate. Press the Save button located at the bottom right of the Items form and re-open the batch to continue on to the Customers form.

Default Item Percentage Values

The screenshot shows the 'Company Rate Change' window with the 'Items' tab selected. The 'Description' field contains 'Oct 2008- Item Code Increases'. The table below lists items with their descriptions and default 5% rates.

Item	Description	Amount
BA Lease	Burglar Alarm Lease	5%
CCTV Lease	CCTV Lease	5%
FA Lease	Fire Alarm Lease	5%
Inspection	Inspection	5%
Monitoring	Monitoring	5%
Open Close	Open/Close Reports	5%
Rental	Rental	5%
Reports	Reports	5%
Service Contract	Service Contract	5%

Modified Item Percentage Values

The screenshot shows the 'Company Rate Change' window with the 'Items' tab selected. The 'Description' field contains 'Oct 2008- Item Code Increases'. The table below lists items with their descriptions and modified 5.00% rates.

Item	Description	Amount
BA Lease	Burglar Alarm Lease	5.00%
CCTV Lease	CCTV Lease	5.00%
FA Lease	Fire Alarm Lease	5.00%
Inspection	Inspection	
Monitoring	Monitoring	5.00%
Open Close	Open/Close Reports	5.00%
Rental	Rental	
Reports	Reports	5.00%
Service Contract	Service Contract	

Notes

The Notes form is provided to track information regarding this rate change batch. Notes are permanent and may not be modified or deleted once saved. To enter a new note, type the note into the lower tier of the Notes form. Each note may be up to 256 characters long. When finished, press the Add Notes button located at the bottom of the form to save. Notes can be added at any time up until the time the batch is posted.

The screenshot shows a software window titled "Company Rate Change". At the top, there is a "Description" field containing the text "Oct 2008- Item Code Increases". Below this is a navigation bar with tabs for "Setup Information", "Branches", "Items", "Import List", "Notes", "Customers", and "Post Rate Change". The "Notes" tab is currently selected. The main area of the window is divided into two sections. The upper section is a large text area containing the text "Rate increase letters scheduled to be mailed out on August 15, 2008." The lower section is labeled "Add Notes" and contains a text area with the text "Rate increase approved by Jack Jones 7/21/2008." Below the "Add Notes" section is a button labeled "Add Notes". At the bottom left of the window, there is a checkbox labeled "Save As New Setup". At the bottom right, there are two buttons labeled "Save" and "Close".

Customers

Once all selections have been made on the Setup Information form, branch selections have been made on the Branches form, and you have made any desired changes to the Items form, navigate to the Customers form and press the Get Customers located at the bottom right.

The Customers form displays the customer number, site name, the Invoice Item code, the current monthly rate, the amount the recurring will be increased and a column displaying the new monthly rate that will go into effect if the batch is posted. A total of all proposed rate increases is displayed at the bottom of the form.

A list of all recurring lines will be listed that are eligible for a rate increase according to your selection criteria from Setup Information, branch selections and Item code selections. You may review the list to make any further exclusion determinations. If recurring lines are on the list and you do not want to rate change them, you would need to enter a date in one of the evaluation date fields that would eliminate the customer recurring line(s) from the batch. After making changes to any customer, system or recurring dates, you would then return to this Customer form and press the Get Customers button to refresh the list. You may do this as many times as you desire until you have the desired list of customer recurring lines to rate increase.

Once you are satisfied with the results and are ready to post the rate increases, proceed to the *Post Rate Change* form.

The screenshot shows the 'Company Rate Change' window with the following data:

Customer #	Site Name	Item	Current	Incre...	New
546I10	Amparo Marin	Monitoring	29.95	1.50	31.45
546I10	Ruth Marin	Monitoring	29.95	1.50	31.45
546I10	Amparo Marin	Monitoring	33.00	1.65	34.65
546I10	Amparo Marin	Open Close	15.00	0.75	15.75
546I30	Tony Marin	Monitoring	29.95	1.50	31.45
546S201	Bill Marin	Monitoring	29.95	1.50	31.45
546S201	Bill Marin	Monitoring	29.95	1.50	31.45
546S30	Wanda Marin	Monitoring	29.95	1.50	31.45
546S30	Wanda Marin	Monitoring	29.00	1.45	30.45
547S10	Yvonne Marin	Monitoring	29.95	1.50	31.45
547S20	Joshua Hunt	Monitoring	29.95	1.50	31.45
548I10	Carrie Hunt	Monitoring	29.95	1.50	31.45
548I20	Nicholas Arruda	Monitoring	29.95	1.50	31.45
548S10	Christopher Hunt	Monitoring	29.95	1.50	31.45
548W10	Don Williams	Monitoring	29.95	1.50	31.45
548W20	Michael Marin	Monitoring	29.95	1.50	31.45

Total Increase : \$23.35

Buttons: Save As New Setup, Save, Close, Get Customers

Post Rate Change

Important Note

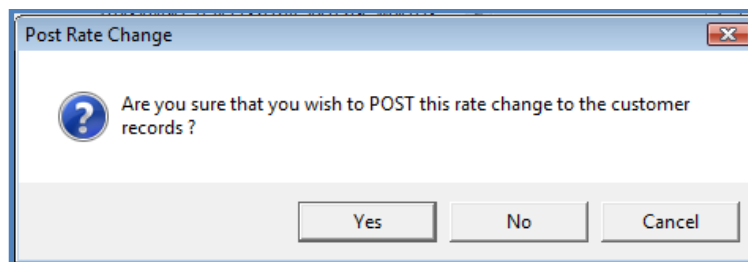
You must first perform a backup of your database BEFORE posting the Rate Increase batch. Once a Rate Increase batch has been posted, it cannot be reversed. If you post a batch and immediately find you have made an error, you will be able to restore your database to the original condition with your database backup.

Once a Rate Change Batch has been posted, it Cannot be reversed.

Company Rate Change batches should be posted *after* the cycle invoicing has been posted for the month prior to the Effective of the rate change. For example, if the Rate Change Effective date is 10/01/2008, do not post the batch until the September 2008 cycle invoicing batch(s) have been posted.

After making a backup copy of your database, you will be ready to post the batch. Posting the batch will mark the end date each recurring line being increased to one day prior to the Effective date of the Rate Change. The program then creates a new recurring line with the new rates that were posted.

1. RMR Reason – You must select a RMR Reason code from the drop-down list. Typically the Rate Increase reason code is selected.
2. Invoice Memo (optional) – You have the option of creating an invoice memo that will print on the next cycle invoice for all of the customers in the Company Rate Change batch being posted.
3. Post – Once an RMR reason code has been selected and the invoice memo has been entered (optional), press the Post button located in the center of the form. After pressing the post button, a message will be displayed confirming you are ready to post; press the Yes button to proceed with the posting process.



Company Rate Change

Description: Oct 2008- Item Code Increases

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

RMR Reason: Rate Increase

Invoice Memo: This invoice reflects a rate increase which is allowable according to the terms of your contract.

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

How to Perform a Rate Change – Item Codes Method with Flat Amount

This method describes how to setup and post a Company Rate Change batch using one specific amount for different Invoice Item codes. For example you may want to increase all recurring lines with the Item code of Monitoring by \$1.50 per month. Further you may only want to increase customer with this item code that currently have a monthly rate of at least \$24.95 per month and up to \$29.95 per month. Or you may only want to increase monthly rates that are currently at \$24.95 per month by \$1.50 per month. Using this method you can accomplish any of these scenarios plus much more by setting the rate change options in the correct manner to accomplish your desired rate increase.

Once you create a new Company Rate Change batch, you may save it and continue working with the batch making changes up until the point the batch has been posted. Once a batch has been posted, no further changes can be made to the batch, however you may view posted batches by selecting the checkbox at the bottom of the Company Rate Change List 'Include Posted Increases'.

To begin the process, navigate to the Client Management menu and select the Company Rate Change menu option. The Company Rate Change List will be displayed. Press the New button located at the bottom of the form to start a new batch. Once the Company Rate Change Form opens, enter a Description for the batch at the top of the form. Proceed on to the next section, Setup Information.

Setup Information

1. Effective Date – select from the drop-down list the month and year the rate change will become effective.
2. Use Item Codes – select this option button.
 - a. Increase or Decrease – Most typically you will select the Increase button.
 - b. Percentage or Flat Amount – Select the Flat Amount button.
 - c. Set All Items / Amount – Select the checkbox, select all items, then enter the default amount that will be used to increase recurring lines.
3. Customer Types – select Commercial, Residential or Both. Only customers with the type selected will be eligible for a rate change.
4. RMR Minimum – If you only want to include customers with a particular minimum monthly rate, then enter that amount in this field. Example: if you may have some customers for which you charge a very low rate, such as \$1.00 per month and do not want to increase those recurring lines. If you enter \$1.01 as the RMR minimum, those recurring lines less than \$1.01 will be excluded from the batch. You can also use this field in combination with the RMR Maximum amount to include a limited monthly rate range of customer recurring.
5. RMR Maximum – If you only want to include customers with a monthly rate up to a certain amount, then enter that amount in this field. Example: If most of your customers have a monthly rate of 29.95 but a few that are above that amount and you do not want to increase those that are currently above 29.95 per month, then you would enter 29.95 in this field. You

can use this field in combination with the RMR Minimum amount to include a limited monthly rate range of customer recurring.

6. Save As New Setup (optional) – If this checkbox is selected, the selections made on the Setup Information will be saved and a new Company Rate Change batch is automatically created with the same setup parameters for use as the basis for future rate changes.
7. Exclude Recurring Items - The two fields in this area allow you to exclude customers that have received a rate change or have a contract start date which is within a specified number of days. This allows you to exclude customers that have recently received a rate change or may be a new customer.

The rate increase date exclusion formula subtracts the number of days from the Company Rate Change Effective; if the last increase date is greater than this calculated date, the recurring line will be excluded. When Company Rate Change batches are posted, the recurring line that is being ended by the rate increase program is marked with a last increase date equal to the effective date for the batch. The typical setting for this field is 365 days.

The contract start date exclusion formula subtracts the number of days from the Company Rate Change Effective; if the contract start (System record) date is greater than this calculated date, the recurring line will be excluded. The typical setting for this field is 365 days.

Once all information is filled in, proceed to the Branches setup form.

Company Rate Change

Description: Oct 2008- Item Code Increases-Flat Amount

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

Effective Date: 01-Oct-08

Setup

Use Item Codes

Increase -OR- Percentage -OR- Flat Amount

Set All Items

Amount: \$1.50

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

Customer Types

Commercial RMR Minimum: \$0.00

Residential RMR Maximum: _____

Both

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

Save Close

Branches

Select which branches to include in the batch. You may check the box All Branches located at the bottom of the form if you evaluate all customer recurring in all branches. You must select at least one branch.

Once the branch selections have been made, proceed to the Items setup form.

Include	Branch	Description
<input checked="" type="checkbox"/>	CA	California
<input checked="" type="checkbox"/>	Charlotte	Charlotte
<input checked="" type="checkbox"/>	Chicago	Chicago
<input checked="" type="checkbox"/>	FL	Florida
<input checked="" type="checkbox"/>	MI	Michigan
<input checked="" type="checkbox"/>	Texas	Texas

All Branches

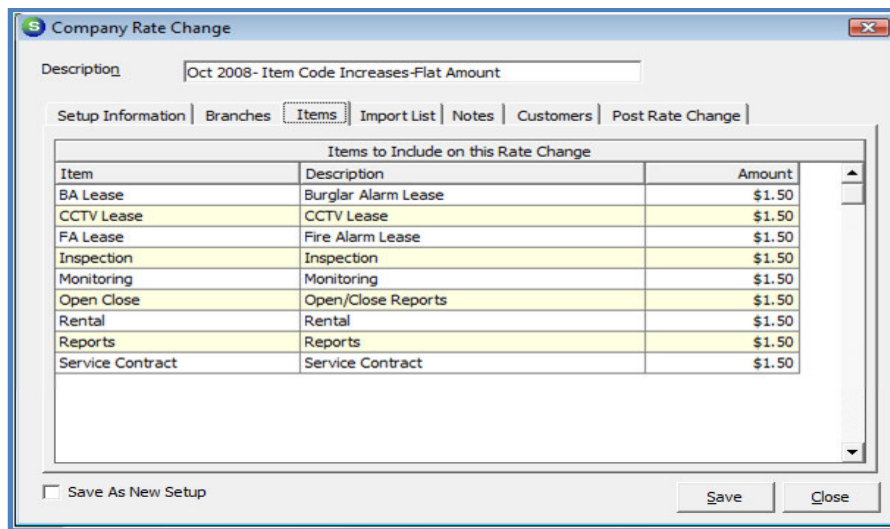
Save As New Setup

Save Close

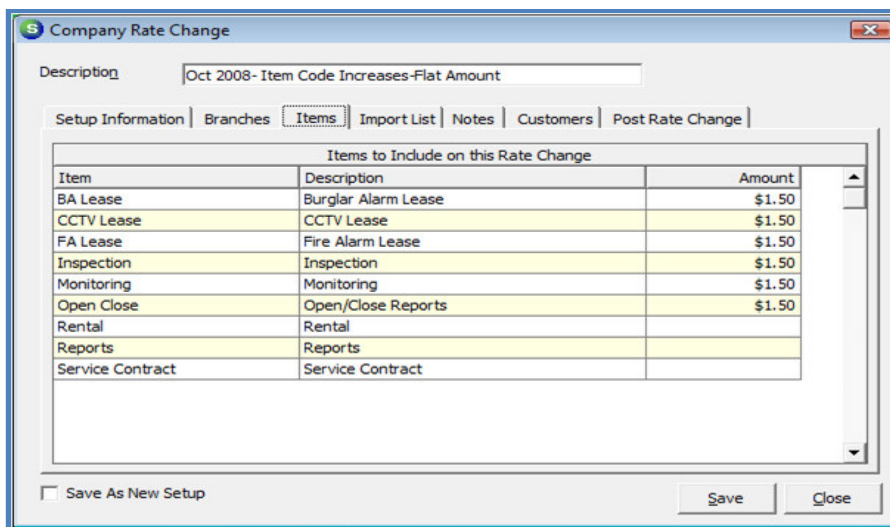
Items

The Items form will display a list of all the recurring type Invoice Item codes, their description and an amount column that will automatically be populated with the default percentage rate that was entered on the Setup Information form. If there are Invoice Item codes that you do not want to rate increase, type in the rate of zero for these Items. You may also change the rate on any Item code to any percentage rate less than the default percentage rate. Press the Save button located at the bottom right of the Items form and re-open the batch to continue on to the Customers form.

Default Item Amounts



Modified Item Amounts



Notes

The Notes form is provided to track information regarding this rate change batch. Notes are permanent and may not be modified or deleted once saved. To enter a new note, type the note into the lower tier of the Notes form. Each note may be up to 256 characters long. When finished, press the Add Notes button located at the bottom of the form to save. Notes can be added at any time up until the time the batch is posted.

The screenshot shows a software window titled "Company Rate Change". At the top, there is a "Description" field containing the text "Oct 2008- Item Code Increases-Flat Amount". Below this is a tabbed interface with the following tabs: "Setup Information", "Branches", "Items", "Import List", "Notes" (which is selected and highlighted), "Customers", and "Post Rate Change". The main content area of the "Notes" tab contains a text box with the text "Rate Increase letters scheduled to be mailed out on 8/25/2008." Below this text box is another empty text box labeled "Add Notes". At the bottom right of the window, there is a button labeled "Add Notes". At the bottom left, there is a checkbox labeled "Save As New Setup". At the bottom right, there are two buttons labeled "Save" and "Close".

Customers

Once all selections have been made on the Setup Information form, branch selections have been made on the Branches form, and you have made any desired changes to the Items form, navigate to the Customers form and press the Get Customers located at the bottom right.

The Customers form displays the customer number, site name, the Invoice Item code, the current monthly rate, the amount the recurring will be increased and a column displaying the new monthly rate that will go into effect if the batch is posted. A total of all proposed rate increases is displayed at the bottom of the form.

A list of all recurring lines will be listed that are eligible for a rate increase according to your selection criteria from Setup Information, branch selections and Item code selections. You may review the list to make any further exclusion determinations. If recurring lines are on the list and you do not want to rate change them, you would need to enter a date in one of the evaluation date fields that would eliminate the customer recurring line(s) from the batch. After making changes to any customer, system or recurring dates, you would then return to this Customer form and press the Get Customers button to refresh the list. You may do this as many times as you desire until you have the desired list of customer recurring lines to rate increase.

Once you are satisfied with the results and are ready to post the rate increases, proceed to the *Post Rate Change* form.

The screenshot shows the 'Company Rate Change' window with the following data table:

Customer #	Site Name	Item	Current	Incre...	New
546I10	Amparo Marin	Monitoring	29.95	1.50	31.45
546I10	Ruth Marin	Monitoring	29.95	1.50	31.45
546I10	Amparo Marin	Monitoring	33.00	1.50	34.50
546I10	Amparo Marin	Open Close	15.00	1.50	16.50
546I30	Tony Marin	Monitoring	29.95	1.50	31.45
546I30	Tony Marin	BA Lease	12.95	1.50	14.45
546S201	Bill Marin	BA Lease	12.95	1.50	14.45
546S201	Bill Marin's Barber Shoppe	FA Lease	68.00	1.50	69.50
546S201	Bill Marin	Monitoring	29.95	1.50	31.45
546S201	Bill Marin's Barber Shoppe	Monitoring	29.95	1.50	31.45
546S201	Bill Marin	Service Contract	5.95	1.50	7.45
546S201	Bill Marin's Barber Shoppe	Open Close	15.00	1.50	16.50
546S30	Wanda Marin	Monitoring	29.00	1.50	30.50
546S30	Wanda Marin	Monitoring	29.95	1.50	31.45
547S10	Yvonne Marin	Monitoring	29.95	1.50	31.45
547S20	Joshua Hunt	Monitoring	29.95	1.50	31.45
548I10	Carrie Hunt	Monitoring	29.95	1.50	31.45
548I20	Nicholas Arruda	Monitoring	29.95	1.50	31.45
548S10	Christopher Hunt	Monitoring	29.95	1.50	31.45
548W10	Don Williams	Monitoring	29.95	1.50	31.45
548W20	Michael Marin	Monitoring	29.95	1.50	31.45

Total Increase : \$31.50

Buttons: Save As New Setup, Save, Close, Get Customers

Post Rate Change

Important Note

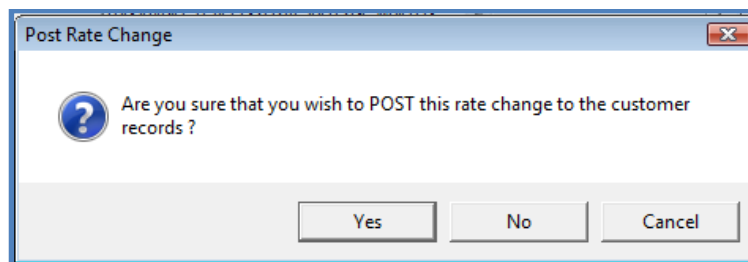
You must first perform a backup of your database BEFORE posting the Rate Increase batch. Once a Rate Increase batch has been posted, it cannot be reversed. If you post a batch and immediately find you have made an error, you will be able to restore your database to the original condition with your database backup.

Once a Rate Change Batch has been posted, it Cannot be reversed.

Company Rate Change batches should be posted *after* the cycle invoicing has been posted for the month prior to the Effective of the rate change. For example, if the Rate Change Effective date is 10/01/2008, do not post the batch until the September 2008 cycle invoicing batch(s) have been posted.

After making a backup copy of your database, you will be ready to post the batch. Posting the batch will mark the end date each recurring line being increased to one day prior to the Effective date of the Rate Change. The program then creates a new recurring line with the new rates that were posted.

4. RMR Reason – You must select a RMR Reason code from the drop-down list. Typically the Rate Increase reason code is selected.
5. Invoice Memo (optional) – You have the option of creating an invoice memo that will print on the next cycle invoice for all of the customers in the Company Rate Change batch being posted.
6. Post – Once an RMR reason code has been selected and the invoice memo has been entered (optional), press the Post button located in the center of the form. After pressing the post button, a message will be displayed confirming you are ready to post; press the Yes button to proceed with the posting process.



Company Rate Change

Description: Oct 2008- Item Code Increases-Flat Amount

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

RMR Reason: Rate Increase

Invoice Memo: This invoice reflects a rate increase which is allowable according to the terms of your contract.

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

How to Perform a Rate Change – Item Codes Method Using Imported Customer List

This method describes how to setup and post a Company Rate Change batch using an imported list of customer numbers. There are two options to choose from when using an imported customer list. You may choose to include only the customers in the list or exclude the customers in the list. The same rules would apply as to which customers are excluded using the exclusion rules for contract dates and recently increased customer selected on the Setup Information form and for any customer, or systems with OK to increase dates that are greater than the rate change effective date, or recurring lines that have a rate increase date beyond the selected effective date for the rate change batch.

You may use the Percentage or Flat Amount option when using this method. Please refer either the Flat Amount or Percentage sections above. The example provided in this section is using an imported customer list and the percentage increase method.

Once you create a new Company Rate Change batch, you may save it and continue working with the batch making changes up until the point the batch has been posted. Once a batch has been posted, no further changes can be made to the batch, however you may view posted batches by selecting the checkbox at the bottom of the Company Rate Change List 'Include Posted Increases'.

To begin the process, navigate to the Client Management menu and select the Company Rate Change menu option. The Company Rate Change List will be displayed. Press the New button located at the bottom of the form to start a new batch. Once the Company Rate Change Form opens, enter a Description for the batch at the top of the form. Proceed on to the next section, Setup Information.

Setup Information

8. Effective Date – select from the drop-down list the month and year the rate change will become effective.
9. Use Item Codes – select this option button.
 - a. Increase or Decrease – Most typically you will select the Increase button.
 - b. Percentage or Flat Amount – Select the Percentage button.
 - c. Set All Items / Amount – Select the checkbox, select all items, then enter the default percentage rate that will be used to increase recurring lines. If the recurring line has an override percentage, that percentage is ignored when using this method.
10. Customer Types – select Commercial, Residential or Both. Only customers with the type selected will be eligible for a rate change.
11. RMR Minimum – If you only want to include customers with a particular minimum monthly rate, then enter that amount in this field. Example: if you may have some customers for which you charge a very low rate, such as \$1.00 per month and do not want to increase those recurring lines. If you enter \$1.01 as the RMR minimum, those recurring lines less than \$1.01 will be excluded from the batch. You can also use this field in combination with the RMR Maximum amount to include a limited monthly rate range of customer recurring.

12. RMR Maximum – If you only want to include customers with a monthly rate up to a certain amount, then enter that amount in this field. Example: If most of your customers have a monthly rate of 29.95 but a few that are above that amount and you do not want to increase those that are currently above 29.95 per month, then you would enter 29.95 in this field. You can use this field in combination with the RMR Minimum amount to include a limited monthly rate range of customer recurring.
13. Save As New Setup (optional) – If this checkbox is selected, the selections made on the Setup Information will be saved and a new Company Rate Change batch is automatically created with the same setup parameters for use as the basis for future rate changes.
14. Exclude Recurring Items - The two fields in this area allow you to exclude customers that have received a rate change or have a contract start date which is within a specified number of days. This allows you to exclude customers that have recently received a rate change or may be a new customer.

The rate increase date exclusion formula subtracts the number of days from the Company Rate Change Effective; if the last increase date is greater than this calculated date, the recurring line will be excluded. When Company Rate Change batches are posted, the recurring line that is being ended by the rate increase program is marked with a last increase date equal to the effective date for the batch. The typical setting for this field is 365 days.

The contract start date exclusion formula subtracts the number of days from the Company Rate Change Effective; if the contract start (System record) date is greater than this calculated date, the recurring line will be excluded. The typical setting for this field is 365 days.

Once all information is filled in, proceed to the Branches setup form.

Company Rate Change

Description: Oct 2008- Item Code Increases

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

Effective Date: 01-Oct-08

Setup

Use Item Codes

Increase -OR- Percentage Set All Items

Decrease -OR- Flat Amount Amount: 5.00%

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

Customer Types

Commercial RMR Minimum: \$0.00

Residential RMR Maximum: _____

Both

Exclude Recurring Items

which have been rate increased within the last 365 days.

which have a contract start date within the last 365 days.

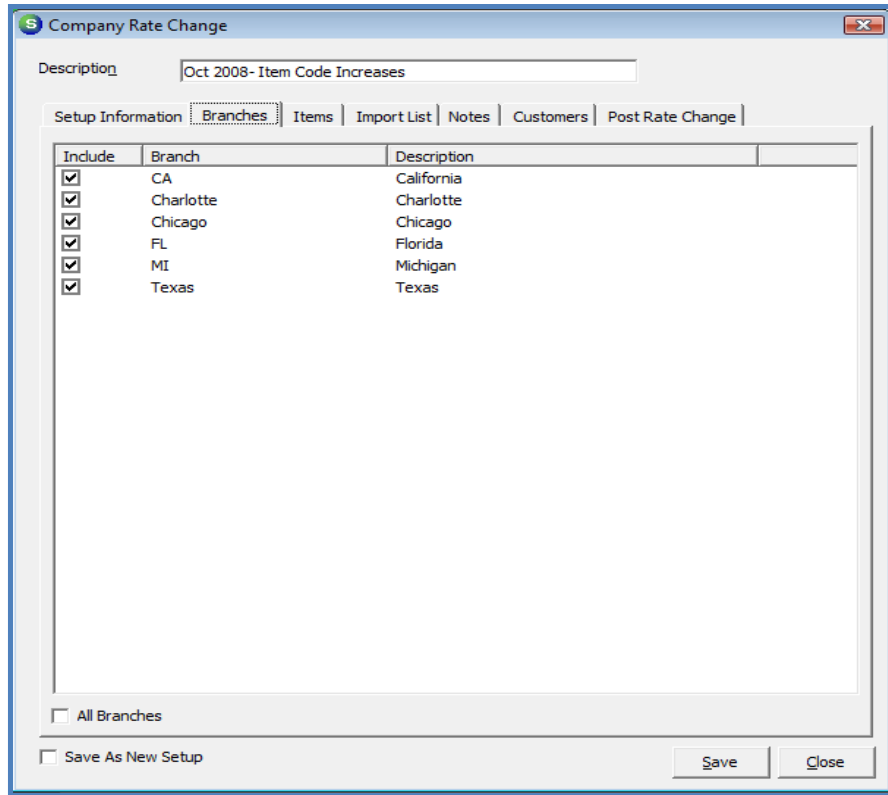
Save As New Setup

Save Close

Branches

Select which branches to include in the batch. You may check the box All Branches located at the bottom of the form if you evaluate all customer recurring in all branches. You must select at least one branch.

Once the branch selections have been made, proceed to the Items setup form.



Items

The Items form will display a list of all the recurring type Invoice Item codes, their description and an amount column that will automatically be populated with the default percentage rate that was entered on the Setup Information form. If there are Invoice Item codes that you do not want to rate increase, type in the rate of zero for these Items. You may also change the rate on any Item code to any percentage rate less than the default percentage rate. Press the Save button located at the bottom right of the Items form and re-open the batch to continue on to the Customers form.

Default Item Percentage Values

Company Rate Change

Description: Oct 2008- Item Code Increases

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

Items to Include on this Rate Change		
Item	Description	Amount
BA Lease	Burglar Alarm Lease	5%
CCTV Lease	CCTV Lease	5%
FA Lease	Fire Alarm Lease	5%
Inspection	Inspection	5%
Monitoring	Monitoring	5%
Open Close	Open/Close Reports	5%
Rental	Rental	5%
Reports	Reports	5%
Service Contract	Service Contract	5%

Save As New Setup

Buttons: Save, Close

Import List

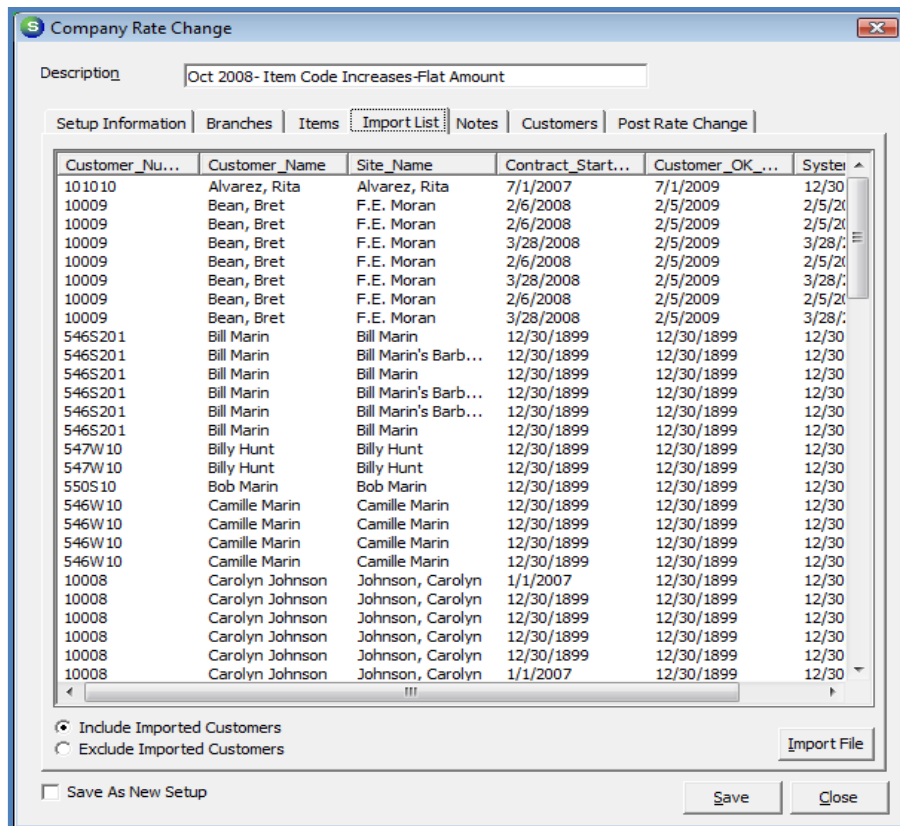
A new option available in SedonaOffice version 5.1 and higher is to import a list of customer numbers from a .csv (comma separated values) file. The import file may contain several columns of information, however the first column of this file must contain the customer number. This imported customer list may be used as the basis of customers to be included or excluded from the Company Rate Change batch. If using an imported customer list as the basis for including customers, only the customers on the list with eligible recurring lines will be included in the Company Rate Change batch. If selecting the option of excluding customers which are on the imported list, any recurring lines associated with a customer on the list will be excluded from the Company Rate Change batch.

From the Import List form press the *Import File* button located at the lower right of the form. Select the file from the directory and select open.

Include Imported Customers – By selecting this option, only the customers on the list with eligible recurring lines will be included in the Company Rate Change batch.

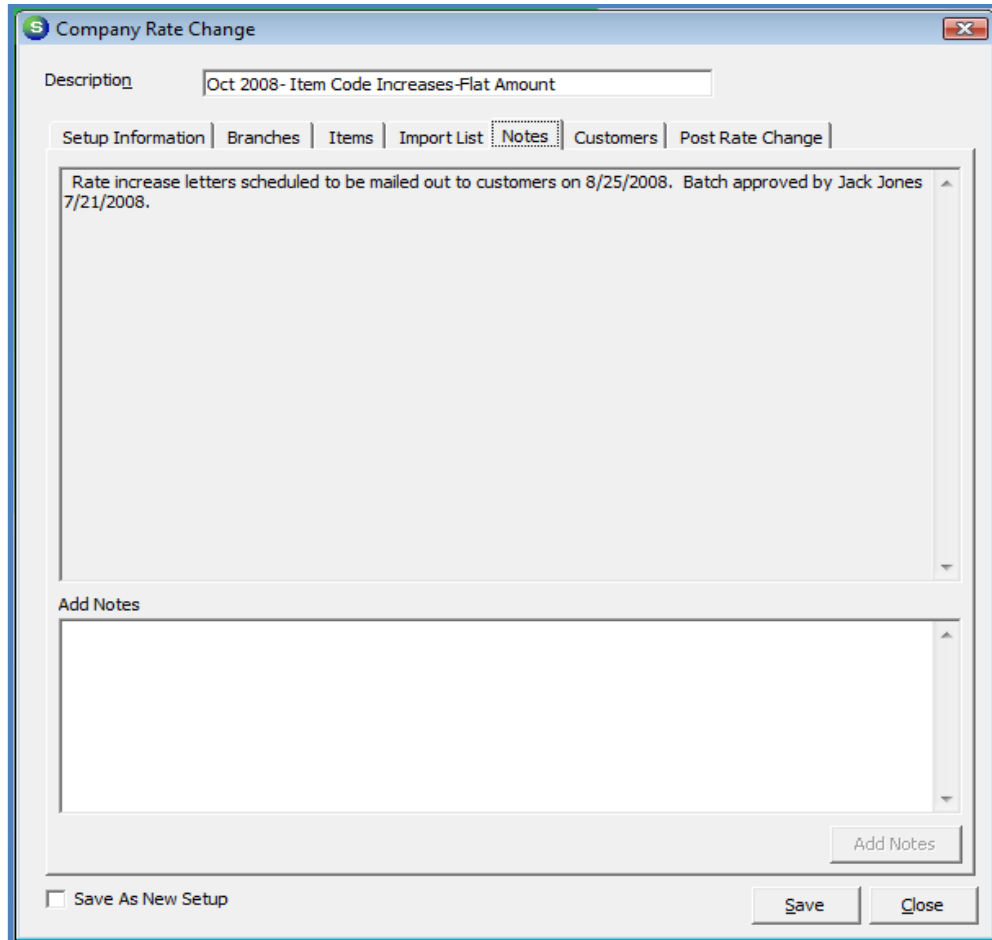
Exclude Imported Customers - If selecting is option, any recurring lines associated with a customer on the list will be excluded from the Company Rate Change batch.

Once the Customer List has been imported proceed to the *Customers* form.



Notes

The Notes form is provided to track information regarding this rate change batch. Notes are permanent and may not be modified or deleted once saved. To enter a new note, type the note into the lower tier of the Notes form. Each note may be up to 256 characters long. When finished, press the Add Notes button located at the bottom of the form to save. Notes can be added at any time up until the time the batch is posted.



The screenshot shows a software window titled "Company Rate Change". At the top, there is a "Description" field containing the text "Oct 2008- Item Code Increases-Flat Amount". Below this is a tabbed interface with the following tabs: "Setup Information", "Branches", "Items", "Import List", "Notes", "Customers", and "Post Rate Change". The "Notes" tab is currently selected and contains a text area with the following text: "Rate increase letters scheduled to be mailed out to customers on 8/25/2008. Batch approved by Jack Jones 7/21/2008." Below the text area is another empty text area labeled "Add Notes". At the bottom right of the window, there is an "Add Notes" button. At the bottom left, there is a checkbox labeled "Save As New Setup". At the bottom right, there are "Save" and "Close" buttons.

Customers

Once all selections have been made on the Setup Information form, branch selections have been made on the Branches form, you have made any desired changes to the Items form, and the Customer List has been imported, navigate to the Customers form and press the Get Customers located at the bottom right.

The Customers form displays the customer number, site name, the Invoice Item code, the current monthly rate, the amount the recurring will be increased and a column displaying the new monthly rate that will go into effect if the batch is posted. Only customers from the imported customer list that are eligible for a rate change will appear in the Customers List. A total of all proposed rate increases is displayed at the bottom of the form.

A list of all recurring lines will be listed that are eligible for a rate increase according to your selection criteria from Setup Information, branch selections and Item code selections. You may review the list to make any further exclusion determinations. If recurring lines are on the list and you do not want to rate change them, you would need to enter a date in one of the evaluation date fields that would eliminate the customer recurring line(s) from the batch. After making changes to any customer, system or recurring dates, you would then return to this Customer form and press the Get Customers button to refresh the list. You may do this as many times as you desire until you have the desired list of customer recurring lines to rate increase.

Once you are satisfied with the results and are ready to post the rate increases, proceed to the *Post Rate Change* form.

The screenshot shows the 'Company Rate Change' window with the following data table:

Customer #	Site Name	Item	Current	Incre...	New
546I10	Amparo Marin	Monitoring	29.95	1.50	31.45
546I10	Ruth Marin	Monitoring	29.95	1.50	31.45
546I10	Amparo Marin	Monitoring	33.00	1.65	34.65
546I10	Amparo Marin	Open Close	15.00	0.75	15.75
546I30	Tony Marin	Monitoring	29.95	1.50	31.45
546I30	Tony Marin	BA Lease	12.95	0.65	13.60
546S201	Bill Marin	BA Lease	12.95	0.65	13.60
546S201	Bill Marin's Barber Shoppe	FA Lease	68.00	3.40	71.40
546S201	Bill Marin	Monitoring	29.95	1.50	31.45
546S201	Bill Marin's Barber Shoppe	Monitoring	29.95	1.50	31.45
546S201	Bill Marin	Service Contract	5.95	0.30	6.25
546S201	Bill Marin's Barber Shoppe	Open Close	15.00	0.75	15.75
546S30	Wanda Marin	Monitoring	29.00	1.45	30.45
546S30	Wanda Marin	Monitoring	29.95	1.50	31.45
547S10	Yvonne Marin	Monitoring	29.95	1.50	31.45
547S20	Joshua Hunt	Monitoring	29.95	1.50	31.45
548I10	Carrie Hunt	Monitoring	29.95	1.50	31.45
548I20	Nicholas Arruda	Monitoring	29.95	1.50	31.45
548S10	Christopher Hunt	Monitoring	29.95	1.50	31.45
548W10	Don Williams	Monitoring	29.95	1.50	31.45
548W20	Michael Marin	Monitoring	29.95	1.50	31.45

Total Increase : \$29.10

Post Rate Change

Important Note

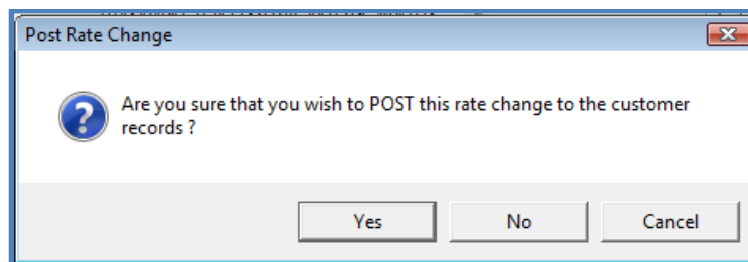
You must first perform a backup of your database BEFORE posting the Rate Increase batch. Once a Rate Increase batch has been posted, it cannot be reversed. If you post a batch and immediately find you have made an error, you will be able to restore your database to the original condition with your database backup.

Once a Rate Change Batch has been posted, it Cannot be reversed.

Company Rate Change batches should be posted *after* the cycle invoicing has been posted for the month prior to the Effective of the rate change. For example, if the Rate Change Effective date is 10/01/2008, do not post the batch until the September 2008 cycle invoicing batch(s) have been posted.

After making a backup copy of your database, you will be ready to post the batch. Posting the batch will mark the end date each recurring line being increased to one day prior to the Effective date of the Rate Change. The program then creates a new recurring line with the new rates that were posted.

7. RMR Reason – You must select a RMR Reason code from the drop-down list. Typically the Rate Increase reason code is selected.
8. Invoice Memo (optional) – You have the option of creating an invoice memo that will print on the next cycle invoice for all of the customers in the Company Rate Change batch being posted.
9. Post – Once an RMR reason code has been selected and the invoice memo has been entered (optional), press the Post button located in the center of the form. After pressing the post button, a message will be displayed confirming you are ready to post; press the Yes button to proceed with the posting process.



Company Rate Change

Description: Oct 2008- Item Code Increases

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

RMR Reason: Rate Increase

Invoice Memo: This invoice reflects a rate increase which is allowable according to the terms of your contract.

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

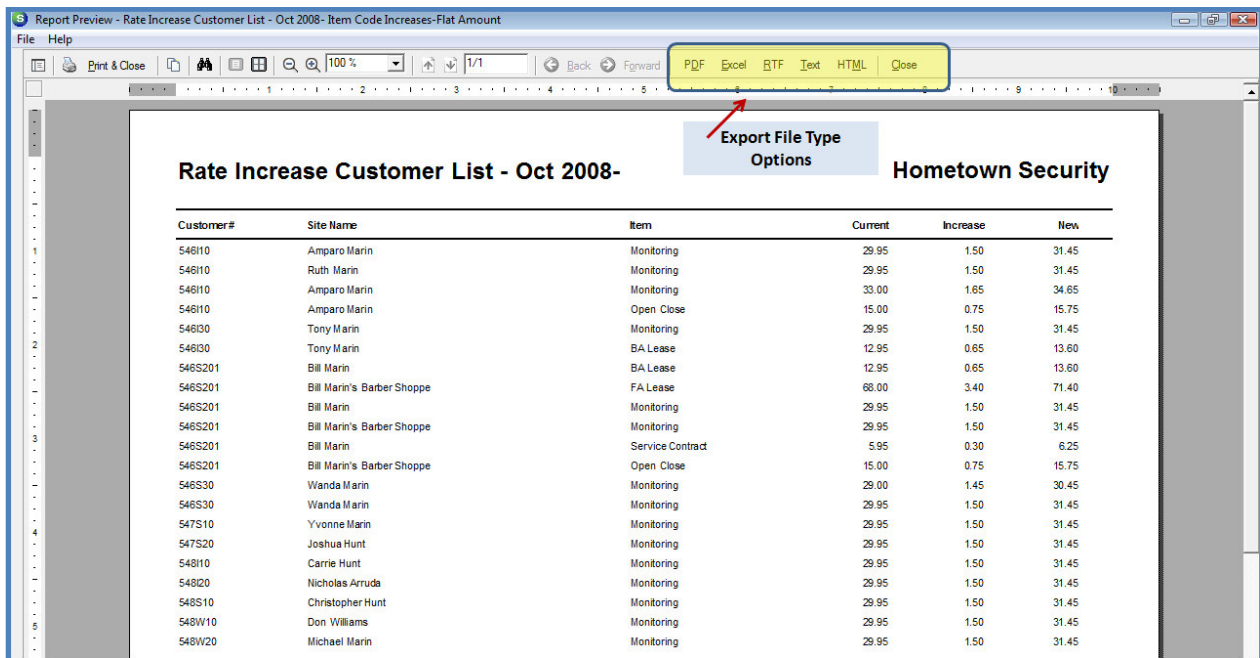
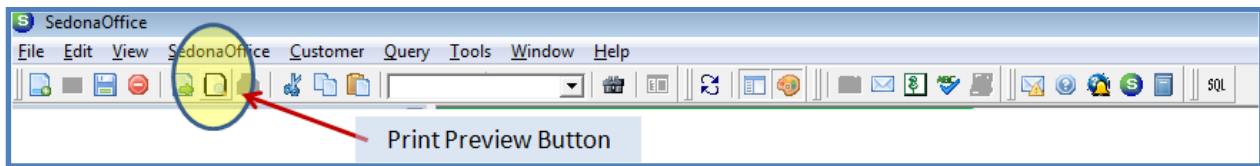
Save Close

Reports

Reports are available from the Company Rate Change batch and a report is also available from the Report Manager.

Rate Increase List from the Company Rate Change Batch

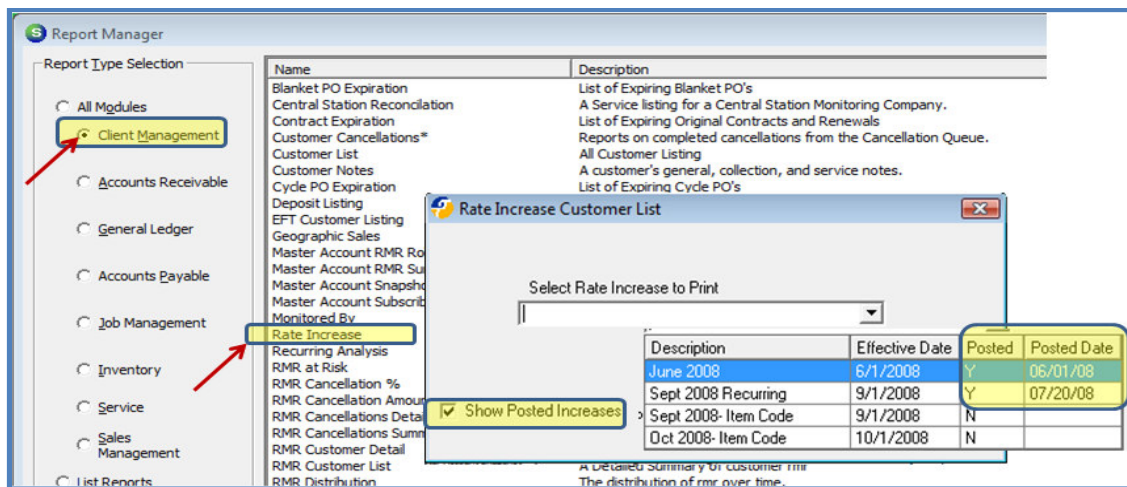
You may print a list of all the recurring lines eligible for a rate change while you have a Company Rate Change batch open. Press the Print Preview button located on the main application toolbar to open the report in preview mode. You may then print the report to a printer or export to a file by selecting one of the export option buttons on the upper right section of the print preview toolbar.



Rate Increase List from the Report Manager

A report is available from the Report Manager titled Rate Increase, which is found in the Client Management group of reports. You may print a list of any posted and un-posted Rate Change batches. To select a posted batch, you must select the checkbox labeled *Show Posted Increases*, located on the lower left of the Report form for posted batches to be included in the drop-down list.

This report is grouped by Customer and sites within the customer. Detailed information is displayed for each recurring line eligible for a rate change. You may print the report to a printer or export to a file by selecting one of the export option buttons on the upper right section of the print preview toolbar.



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Customer	Site Name	Item	Current	Increase	New
546110	Amparo Marin	Monitoring	29.95	1.50	31.45
		Site Total	29.95	1.50	31.45
	Ruth Marin	Monitoring	29.95	1.50	31.45
	Site Total	29.95	1.50	31.45	
	Amparo Marin	Monitoring	33.00	1.65	34.65
		Open Close	15.00	0.75	15.75
Site Total		48.00	2.40	50.40	
Customer Total		107.90	5.40	113.30	
546130	Tony Marin	Monitoring	29.95	1.50	31.45
		BA Lease	12.95	0.65	13.60
	Site Total	42.90	2.15	45.05	
Customer Total		42.90	2.15	45.05	

