

Company Rate Change Overview and Topics

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The Company Rate Change function is used to set up and post price changes to the recurring lines for your customers. If your company has a provision in its contracts that allows for periodic rate increases, this function will provide you with various options for 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. Depending on which fields are populated in your data will determine which customers/recurring lines will be affected by a rate change.

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 on your recurring revenue without making any changes to the existing recurring lines. Once you have determined when and how you want to post a rate 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 canceled 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.

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 evaluates data within your customer records to determine which recurring lines are eligible for a rate change. Follow the links below for information on each Rate Change Method.

Rate Change Topics

[User Group Security](#)

[Renewal Date Method - Overview](#)

[Item Codes Method - Overview](#)

[How To - Rate Change with the Renewal Date Method](#)

[How To - Rate Change with the Item Code Method using a Flat Rate](#)

[How To - Rate Change with the Item Code Method using a Fixed Rate](#)

[How To - Rate Change with the Item Code Method using a Percentage](#)

[How To - Rate Change using the Item Code using an Imported Customer List](#)