## Example of a Company Rate Change Excluding Accounts

Last Modified on 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

ley\Documents\RATE INCREA	SES\QB-FindAcctsWithSam	elterns.sqf		2				- 0 -
Fields to Display Customer_Number Site_Name Alarm_Account Sub_Item_Of		RMR_Active	Relation = =	Criteria Y 086	And/Or And And	Group 1	Order By Sub_Item_Of Customer_Number	A/D A A
Item, Code Cyde, Amount	]					<u>,</u>		3
14		Distinct rows	1 L Criter	ria Bows: 50			14	
Customer_Jhumber	Site_Name	Alerm_Account	Sub	Jtem_Of	Item_Code		Cyde	Amount
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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:

Customer	<ul> <li>Fields to Display</li> </ul>	Fel	4	Relation	Criteria	And/Or	Group	Order By	AS
Site	Customer_Number				v			Sub Item Of	A
System	Site_Name		R_Active	-		And	1	Customer_Number	A
Recurring	Alarm_Account	Iter	_Code	-	086	And	1		
- Item_Code	Sub_Item_Of Item_Code								
- Item_Type_Code	Cycle_Amount								
- Item_Type_Desc	Cyde_Amount								
- Recurring_User_Description									
<ul> <li>Recurring_Invoice_Item_Memo</li> </ul>									
- Bill_Cycle									
- Monthly_Amount									
- Cycle_Amount									
- Recurring_Quantity									
<ul> <li>Recurring_Rate</li> </ul>									
- Cycle_Start_Date									
- Cycle_End_Date									
-Last_Cycle_Date									
-Next_Cycle_Date	<	> 4					•	<	
- Bill_On_Day					-				
- RMR_Active	11	1	Distinct rows	4 Crite	ria Bows: 50			11	
- Recurring PO Number	-			_			_		_
- Recurring_PO_Expire	Customer_Number	Site_Name	Alarm_Account		Item_Of	Item_Code		Cyc	le_Amount
- Bill_To_Master_Account	562	Smokey Treats 88Q	562-1	086		086			48.00
- Renewal_Date	562	Smokey Treats BBQ - Main B		086		086			48.00
-Last_Rate_Increase_Date	995-2	D995 - Sub2	995-2-1-Fire	Mon		086			48.00
Rate_Increase_Date	995-2 2041	D995 - Sub2 Society For Savings	995-2-2-Burg 13563	Mor N/A	-01	086			48.00
- Override Percent	263-1	University of Michigan-Ann		N/A		086			48.00
				N/A		086			\$76.00
- Sub Item Of									48.00
- Sub_Item_Of	263-2 266	University of Michigan-Cant Art Van Pure Sleep	on 1234A 266			086			
- Sub_Item_Of - Recurring_Reference	263-2 266 995-1	University of Michigan-Cant Art Van Pure Sleep D995 - Sub1	266 995-1 Fire and Burg	N/A N/A		086			48.00
- Sub_Item_Of	266	Art Van Pure Sleep	266	N/A					
- Sub_Item_Of - Recurring_Reference - Recurring_Group_Number @ Bill To	266	Art Van Pure Sleep	266	N/A					
- Sub_Item_Of - Recurring_Reference - Recurring_Group_Number 9: Bill To 9: Record_Id	266	Art Van Pure Sleep	266	N/A					
- Sub_Item_Of - Recurring_Reference - Recurring_Group_Number (B) Bill To (B) Record_Id - Cancel	266	Art Van Pure Sleep	266	N/A					
- Sub_Item_Of - Recurring_Reference - Recurring_Group_Number 9: Bill To 9: Record_Id	266	Art Van Pure Sleep	266	N/A					
- Sub_Item_Of - Recurring_Reference - Recurring_Group_Number (): Reit To (): Record_Id Cancel - Collection EFT	266	Art Van Pure Sleep	266	N/A					
- Sub_Item_Of - Recurring_Reference - Recurring_Number (2) Bill To (2) Record_Id - Cancel - Collection	266	Art Van Pure Sleep	266	N/A					
- Sub_Item_Of - Recurring_Reference - Recurring_Group_Number (B) Reil To (B) Record_Id Cancel Collection EFT User_Defined	266	Art Van Pure Sleep	266	N/A					
- Sub_Item_Of - Recurring_Reference - Recurring_Group_Number (e): Record_Id Collection E8T User_Defined Jaing	266	Art Van Pure Sleep	266	N/A					
- Sub_Item_Of - Recurring_Reference - Recourring_Croup_Number (0) Bit TO (0) Recond_Id Collection EFT User_Defined Aging Contacts Invacie	266	Art Van Pure Sleep	266	N/A					
Sub_Item_Of Recurring_Reference - Recourring_Group_Number (0): Bill To (0): Bill T	266	Art Van Pure Sleep	266	N/A					
Sub_Item_Of Recurring_Reference - Recourring_Group_Number (0): Bill To (0): Bill T	266 995-1	Art Van Pure Sleep	266	N/A			_		

- 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

4 Rows Returned	49 SQL Gear Open Save Export Breview Close	]
File name:	QB-RateChangeAcctsWithSameItems_Exclude	~
Save as type:	Comma Separated (*.csv)	~
∧ Hide Folders	Save	

8. Click OK after confirmation Export Complete



- 9. Managing CSV file for Import
- 10. Open the CSV file that was exported into Excel

A	В	С	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	В
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

File name:	QB-RateChangeAcctsWithSameItems_Exclude_2.csv					~
Save as type:	All Files					$\sim$
ide Folders	×	Encoding:	ANSI	Save	Cancel	

- 13. Importing List into Company Rate Increase
- 14. Open Company Rate Increase
- 15. Fill in the Setup Information Tab

iptio <u>n</u> up Information	ExcludeCustomerRateChang		C Standard Custome C Master Accounts © Both mers Post Rate Change
😁 Setu	Effective Date 0	1-Mar-24	<u> </u>
€L	-OR-	By:   RMR Amount  Percentage  Elat Amount  Fixed Amount	F Set <u>All Items</u>
	Ise Recurring Renewal Dates Effective Date is AND Recurring Rate In Update Rate Increase Cycle Date		Use Qverride Pctg Only the Effective Date, Increase by
484	Next Cyde Date 3	/1/2024	<b>*</b>
🥃 Cust	omer Types (* Both Commercial C Besidential	RMR Min RMR Ma	140100

16. Fill in the Branches Tab

scription	ExcludeCustomerRateC		C Standard Customers C Master Accounts C Both
Setup Infor	mation Branches Items	Import List   Notes   Customers	Post Rate Change
	Ace Security Systems	Ace Security Systems	I
×	Americas Best	Americas Best	
~	BELG	Belgium	
<b>v</b>	FRI	FRI	
~	FRS	FRS	
	Holding Branch	Holding Branch	
¥	IWA	IWA	
~	J&A Security	J&A Security	
~	Kinston	Kinston	
<b>V</b>	Manitou Default	Manitou Default	
<b>~</b>	MI	Michigan	
<b>~</b>	New	New	
✓	OH	Ohio	
All Branc	hes		
Save As N	lew Setup		Save Close

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

	scription [ExcludeCustomerRateChange Setup Information   Branches   Items   Import List   Notes   Customers   Pr		
	Items to Include on this Rate Change		
Item	Description	Amount	
086	Recurring Mon Services II	55.00	-
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 Waterflow	Inspection-Fire-Waterflow		
Inspection-Smoke/CO2	Inspection-Smoke / CO2 Detectors		
Pase	Equipment/System Lease		
Maint	Maintenance Agreement		
Mon-01	Monitoring Services		
MON-DLR	Dealer Basic Monitoring		
Monitoring Gold	Monitoring Services Gold	S	
Monitoring-Securtech	Monitoring		
OCLG	Open/Close Logging	2	
OCRPT	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		

18. In the Import List Tab – Click on Import File – Open the saved condensed file – Click on Exclude Imported Customers after file loads



File name:	QB-RateChangeAcctsWithSameItems_Exclude_2 ~	Ascii	~
		Open	Cancel

Company Rate Change	×
Description ExcludeCustomerRateChange	C Standard Customers C Master Accounts C Both
Setup Information   Branches   Items Import List   Notes   Customers   P	lost Rate Change
Outcomer_Nu         Stel Name           552         Sondery Trees           995-2         D996 - 5ub2	
C Include Imported Customers P Exclude Imported Customers	) [inputting]
Save As New Setup	Save Gose

19. Add any notes in the Notes Tab

Company Rate Change		
Description ExcludeCusto	merRateChange	C Standard Customers C Master Accounts Both
Setup Information Branches	Items   Import List Notes   Customers   Po	ust Rate Change
		Â
Add Notes		~
		^
		~
		Add Notes
Save As New Setup		Save Glose

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

scription	ExcludeCustomerRateChange		C Standard Customers Master Accounts Both		
Setup Informa	tion Branches I Items Imp	ort List Notes Custom		te Change	New
2041	Society For Savings	086	48.00	7.00	55.00
266	Art Van Pure Sleep	086	48.00	7.00	55.00
	То	tal Increase : \$14.00			t Customers
Save As New					

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

escripting ExcludeCustomerRateChange C Standard Customers	
P Beb Sekpinformation   Branches   Seens   SeportLink   Notes   Customers   Part Nate Charge	lost Rate Change X
NHR Rigmon Falls Invesse	Ves No Cancel
Post	Post Rate Increase X
Refere sporting are rate increases. A's always a good does to perform a backwar of the detabations. If you would have increase only we ranked that summaring have parted incremently, you'll have no way to reverse this position. Be sure that you have a dependable backup to full back on if you make DHG changes in error.	
Save An New Setup Save	