

# Create a Rate Change by Percentage

Last Modified on 05/05/2022 5:15 pm EDT

Companies are able to perform rate changes to active RMR. RMR may be increase by a dollar amount or by a percentage. Using the Rate Change program provides the ability to perform what-if scenarios before making any final changes to the current RMR rate.

To perform or test an RMR Rate Change, from the main menu, arrive at the Rate Change page with this path: Accounts Receivable> RMR.

The RMR page will be displayed. Click on the New Rate Change button at the upper right of the page.

The screenshot shows the RMR page interface. At the top right, there is a green button labeled '+ New Rate Change' with a plus sign icon, which is highlighted by a green circle and an arrow. Below this, there are several tabs: 'RMR 114', 'RMR Rate Change History 10', 'RMR Invoice Generation History 127', and 'Recurring Royalties/Commissions 0'. The main area contains a grid of RMR records. The grid has columns for RMR #, Customer, Item Code, Cycle, Next Inv., Last Inv., Monthly Amt., and Cycle Amt. The total amount shown is \$3,625.20. At the bottom right, it indicates '1 - 100 of 114 items' and a 'Refresh' button.

RMR #	Customer	Item Code	Cycle	Next Inv.	Last Inv.	Monthly Amt.	Cycle Amt.
2	Papay, Travis - 1028	Monitoring	Semi-Annual	Feb 1, 2022	Aug 1, 2021	\$38.00	\$228.00
3	Papay, Travis - 1028	Radio Backup	Monthly	Apr 1, 2022	Mar 1, 2022	\$21.00	\$21.00
4	Donoson, Bill - 1029	Monitoring	Monthly	Mar 1, 2022	Oct 1, 2017	\$33.25	\$33.25
5	Jones, Drew - 1030	Monitoring	Monthly	Jul 1, 2015	Jan 1, 2022	\$33.31	\$33.31
6	Parsons, Alan - 1033	Monitoring	Monthly	Jan 1, 2022	Dec 1, 2021	\$32.50	\$32.50
7	Papay, Travis - 1028	Monitoring	Monthly	Apr 1, 2022	Mar 1, 2022	\$12.81	\$12.81
8	Cocker, Alta - 1034	Monitoring	Monthly	Jan 1, 2022	Dec 1, 2021	\$37.50	\$37.50
9	Waters, Roger - 1035	Monitoring	Monthly	Nov 1, 2015	Dec 1, 2021	\$99.00	\$99.00
10	All Electronics - 1038	Maint Agreement	Quarterly	Nov 1, 2015	Dec 1, 2021	\$10.00	\$30.00
11	Crossman, Matt - 1039	Monitoring	Monthly	Jan 1, 2022	Dec 1, 2021	\$22.50	\$22.50
12	Crossman, Matt - 1039	Monitoring	Monthly	Jan 1, 2022	Dec 1, 2021	\$32.50	\$32.50
13	Papay, Travis - 1028	Monitoring	Monthly	Apr 1, 2022	Mar 1, 2022	\$72.00	\$72.00
10015	Patterson, Josh - 1052	Monitoring	Monthly	Jan 1, 2022	Dec 1, 2021	\$135.00	\$135.00
11016	All Electronics - 1038	Maint Agreement	Quarterly	Jan 1, 2022	Oct 1, 2021	\$9.33	\$28.00
11018	All Electronics - 1038	Monitoring	Monthly	Jan 1, 2022	Dec 1, 2021	\$160.00	\$160.00

The New RMR Rate Change page will be displayed. The items listed in the grid are all active RMR records. On this page you will select which RMR records you want to rate increase. Using the column filters will help narrow down the list of which RMR's you want to rate change.

In our example below, we filtered on the Item Code column and selected just the Monitoring item. We also filtered on the Monthly column and selected where the amount equals \$30.00. At the bottom of the page will be a count of RMR's which met the filter criteria. You may filter on multiple columns to arrive at the desired list of potential RMR's to increase.

If you want to rate increase all records in the grid, check the Select All checkbox at the upper left of the page. If only certain records are to be increased, check the box to the left of each RMR to be included, and then click the Next Step: Set Rate Change button at the bottom of the page.

### New RMR Rate Change

Cancel

Select RMRs
Set Rate Change

Select RMRs for Rate Change
Show All
Quantity Based
Cycle Amount

Select All
Selected: 3
Export to Excel
Custom Grid Layout

<input type="checkbox"/>	RMR #	Customer	Item Code	Description	Last Rate Change	Cycle	Next Inv	\$ Monthly	\$ Cycle
<input type="checkbox"/>	11118	Customer_Test - 3694	Monitoring	Monitoring Services	Feb 10, 2022	Annual	Feb 10, 2023	\$30.00	\$360.00
<input type="checkbox"/>	11022	Coetjens, Jeff - 1064	Monitoring	Monitoring Services	Oct 1, 2021	Semi-Annual	Apr 1, 2022	\$30.00	\$180.00
<input type="checkbox"/>	11024	Pagay, Travis - 1028	Monitoring	Monitoring Services	Mar 1, 2022	Monthly	Apr 1, 2022	\$30.00	\$30.00
<input type="checkbox"/>	11082	Pagay, Travis - 1028	Monitoring	Monitoring Services	Mar 1, 2022	Monthly	Apr 1, 2022	\$30.00	\$30.00
<input checked="" type="checkbox"/>	11126	Jo Smith Residence, page - 1501	Monitoring	Monitoring Services	Dec 31, 1969	Monthly	Mar 3, 2022	\$30.00	\$30.00
<input checked="" type="checkbox"/>	11117	Aacott, Alice - 3438	Monitoring	Monitoring Services	Dec 31, 1969	Annual	Mar 1, 2022	\$30.00	\$360.00
<input checked="" type="checkbox"/>	11109	AB Customer 1 - 3452	Monitoring	Monitoring Services	Feb 1, 2022	Monthly	Mar 1, 2022	\$30.00	\$30.00
<input type="checkbox"/>	11122	Waters, Roger - 1035	Monitoring	Monitoring Services	Dec 31, 1969	Monthly	Feb 25, 2022	\$30.00	\$30.00
<input type="checkbox"/>	11120	abc, abc - 3698	Monitoring	Monitoring Services	Dec 31, 1969	Annual	Feb 17, 2022	\$30.00	\$360.00
<input type="checkbox"/>	11119	Customer_Test - 3696	Monitoring	Monitoring Services	Dec 31, 1969	Annual	Feb 17, 2022	\$30.00	\$360.00
<input type="checkbox"/>	11106	A Business Company - 3501	Monitoring	Monitoring Services	Dec 1, 2021	Monthly	Jan 1, 2022	\$30.00	\$30.00
<input type="checkbox"/>	11097	Aacott, Alice - 3438	Monitoring	Monitoring Services	Dec 1, 2021	Monthly	Jan 1, 2022	\$30.00	\$30.00

1 - 54 of 54 items
Refresh

Next Step: Set Rate Change

The Set Rate Change page will be displayed. At the upper left of the page are three fields that require user input.

- **Amount or Percent?** – Select the Percent method. Percent means you are increasing the RMR by a percentage rate.
- **Rate Change** – Enter the percentage for the rate change.
- **Reason** – Select the appropriate Recurring Reason code for the rate change.

Once the information is filled in, the grid will populate with the Old amount, the New amount, and the Change amount.

If there is a very long list of RMRs eligible for the rate change and you want to review this prior to applying the new rates, click on the Export to Excel button. If you find that there are some RMRs on the list you want to exclude from the rate change, click on the Previous Step button, and deselect the checkbox of the RMRs to remove from the list. After changes have been made, click on the Next Step: Set Rate Change button at the bottom of the page.

You will need to once again fill in the Set Rate Change fields. If you are satisfied with the RMRs to rate change, click the Apply Rate Change button at the bottom of the page. When the process finishes, the RMRs selected will display the new rate.

# New RMR Rate Change

Select RMRs

Set Rate Change

## Set Rate Change

Quantity or Percent?

Rate Change

Reason

Old Total \$90 → New Total \$92.7

Selected: 3

Export to Excel

RMR #	Customer	Item Code	Cycle	Next Inv	Old \$	New \$	Change \$
11109	AB Customer 1 - 3452	Monitoring	Monthly	03/01/2022 12:00:00 AM	30	30.9	0.9
11117	Aacott, Alice - 3438	Monitoring	Annual	03/01/2022 5:00:00 AM	30	30.9	0.9
11126	Jo Smith Residence, pope - 1501	Monitoring	Monthly	03/03/2022 8:28:19 PM	30	30.9	0.9

1

1 - 3 of 3 items

Refresh

Previous Step

Apply Rate Change