

Enterprise - How to Mass Update Assignment Rates

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In certain scenarios, it is beneficial to update all assignment rates simultaneously. This is especially helpful when new rates are negotiated, rates need to be corrected, or all employees assigned to a specific role are given a raise. You can quickly and efficiently mass update assignment rates directly within Enterprise by following the steps outlined in this article.

Note Please consider the following when Mass Updating Rates within Enterprise:

1. When mass updating rates via the Customer record, all corresponding assignment record rates will NOT be updated with the new rates.
2. When mass updating rates via the Order record, all corresponding assignment record rates will be updated within that Order.

From the Order, go to the actions menu and select mass update rates. Note that the starting rates in our example are: Pay \$10.00/Bill \$13.10.

The screenshot displays the Enterprise software interface for 'Green Foods, Inc., Primary'. The top navigation bar includes 'tasks', 'appointments', 'social', and 'email'. The main content area shows the 'order status' for a specific order, with fields for 'Pay Rate' (\$10.00), 'Bill Rate' (\$13.10), 'Status' (Filled), 'Date Opened' (7/8/2015 12:12:00 PM), and 'Duration' (Indef). A left-hand menu lists various actions, with 'Mass Update Rates' highlighted in a red box. Below the menu, a table titled 'assignments' lists employees and their rates. The 'Pay' and 'Bill' columns are highlighted in a red box, showing a multiplier of 1.10 for all employees, indicated by a red asterisk in the 'Pay' column.

Employee	Perf Code Description	Orig. Start	Start	End	Pay	Bill
Greene, Alexandra N	Open	7/5/2015	7/5/2015		* \$10.00	\$13.10
Juniper, Bill	Open	7/5/2015	7/5/2015		\$10.00	\$13.10
King, Brandon	Open	7/5/2015	7/5/2015		\$10.00	\$13.10
Klassen, Sandra Lee	Open	7/5/2015	7/5/2015		\$10.00	\$13.10
Mhaske, Swapnil	Open	7/5/2015	7/5/2015		\$10.00	\$13.10

The Update Rates form gives several options for modifying Pay/Bill amounts. You may (1.) change bill/pay rates, or (2.) change the multiplier code being used.

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update rates

i This Utility will update pay and/or bill rates for all assignments on this order. For example, this may be used for changes in contract terms. If you only wish to change pay rates, you may leave bill rates blank. Likewise, if you only wish to change bill rates, you may leave pay rates blank. Multiplier codes, if configured, will be used to adjust bill rates.

1. Change pay/bill rates

Change all pay and/or bill rates to amount:
 1A. Pay rate: Bill rate:

Increase/decrease pay and/or bill by amount:
 1B. Pay rate: Bill rate:

Increase/decrease pay and/or bill by percent:
 1C. Pay rate: Bill rate:

2. Change the multiplier code being used

New multiplier code:

0 Save

Change the Pay/Bill Rates:

A. Change all pay and/or bill rates to amount allows new rates to be entered.

Change all pay and/or bill rates to amount:

Pay rate: Bill rate:

B. Increase/decrease pay and/or bill by amount allows an amount to be entered which will affect the pay and/or bill rates by. For instance: increase pay by 25 cents and the bill by 50 cents you would enter:

Increase/decrease pay and/or bill by amount:

Pay rate: Bill rate:

C. Increase/decrease pay and/or bill by percent allows a percentage to be entered with which the pay and/or bill

will be affected:

Increase/decrease pay and/or bill by percent:

Pay rate: Bill rate:

Note the percentage should be entered as a full number with no decimal. Upon saving, the rates of the

assignments will be updated to the amounts entered.

Note if you want to change the pay but not the bill, leave the Bill rate field blank. Or, if you want to change the bill but not the pay, leave the Pay rate field blank.

Once the changes are entered and saved the rates will be updated accordingly:

assignments

Employee	Perf Code Description	Orig. Start	Start	End	Pay	Bill
Greene, Alexandra N	Open	7/5/2015	7/5/2015		\$10.20	\$13.50
Juniper, Bill	Open	7/5/2015	7/5/2015		\$10.20	\$13.50
King, Brandon	Open	7/5/2015	7/5/2015		\$10.20	\$13.50
Klassen, Sandra Lee	Open	7/5/2015	7/5/2015		\$10.20	\$13.50
Mhaske, Swapnil	Open	7/5/2015	7/5/2015		\$10.20	\$13.50

Change the multiplier code being used

This option will allow the current multiplier code to be updated. For instance, we may initially be charging a 1.31 markup and increase or decrease the markup as the job continues.

Change the multiplier code being used

New multiplier code:

Once saved, the Multiplier Code on the Order will be changed.

financial details

Multiplier	<input type="text" value="1.47"/>	Pay Periods	<input type="text" value="52"/>
Bill Rate	<input type="text" value="\$14.70"/>	Pay Rate	<input type="text" value="\$10.00"/>

Note To be able to select the new multiplier code, it must already exist as a default on the customer record.

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