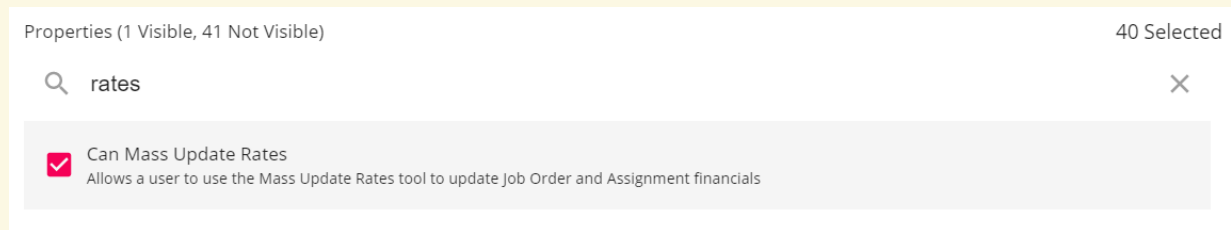


# Beyond - How to Mass Update Rates

Last Modified on 08/10/2020 2:49 pm CDT

In certain scenarios, it is beneficial to update rates for multiple assignments and orders. This across-the-board update is especially helpful when new rates are negotiated, rates need to be corrected, or all employees assigned to a specific role have received a raise. A mass update within Beyond can be done from either the assignment search or order search.

**\*Note\*** In order to access this functionality within Beyond, you will need to be a member of a Permission Security Group that contains the **'Can Mass Update Rates'** permission.



For more information about security permissions see [Beyond - Managing Security Groups](#).

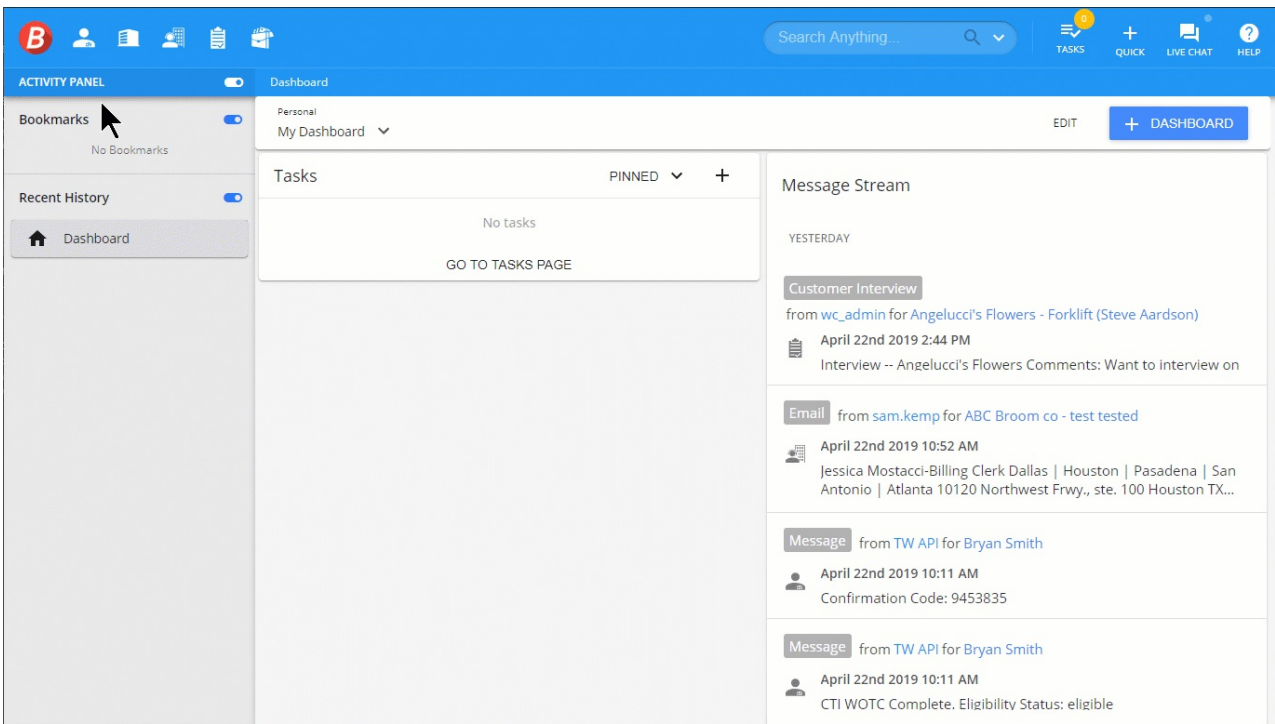
## This article reviews:

1. [Mass Update Rates - Assignments](#)
  - [Change the Pay/Bill Rates](#)
  - [Change the Multiplier Code Being Used](#)
2. [Mass Update Rates - Orders](#)
  - [Change the Pay/Bill Rates](#)
  - [Change the Multiplier Code Being Used](#)
  - [Update Rates on Assignments Within Orders](#)

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## Mass Update Rates - Assignments

1. Navigate to the assignment search option and search for the assignments you wish to updates
  - Check out [Beyond - Advanced Searching](#) for more information
2. Select the assignments you want to include in your update
3. Choose the Mass Update Rates option from the search actions menu



## Change the Pay/Bill Rates

Within the Mass Update Rates - Select Rates window, click on the drop-down titled Update Method. You will see three different methods in which the pay/bill rates can be updated:

### 1. Increase Rates By Value

### Mass Update Rates - Select Rates

1 Select Rates ————— 2 Preview Changes

Choose an update method and rate changes to apply to the selected records. If you just want to change the multiplier code and update rates accordingly, select a new multiplier code and leave the other fields blank. You will be able to review the updates on the next page before committing them.

Update Method  
Increase Rates By Value

Pay Rate  
0.25

Bill Rate  
0.50

Change Multiplier Code To  
Do not change Multiplier Code

CANCEL NEXT >

## 2. Increase Rates By Percentage

### Mass Update Rates - Select Rates

1 Select Rates ————— 2 Preview Changes

Choose an update method and rate changes to apply to the selected records. If you just want to change the multiplier code and update rates accordingly, select a new multiplier code and leave the other fields blank. You will be able to review the updates on the next page before committing them.

Update Method  
Increase Rates By Percentage

Pay Rate  
5.50

Bill Rate  
7.50

Change Multiplier Code To  
Do not change Multiplier Code

CANCEL NEXT >

## 3. Change Rates To Value

### Mass Update Rates - Select Rates

1 Select Rates ————— 2 Preview Changes

Choose an update method and rate changes to apply to the selected records. If you just want to change the multiplier code and update rates accordingly, select a new multiplier code and leave the other fields blank. You will be able to review the updates on the next page before committing them.

Update Method  
Change Rates To Value

Pay Rate  
10.10

Bill Rate  
13.50

Change Multiplier Code To  
Do not change Multiplier Code

CANCEL NEXT >

**\*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.

If you choose to only include a new Pay Rate, a new option will appear to 'Maintain the current markup percentage when changing pay rate':

Mass Update Rates - Select Rates

1 Select Rates ————— 2 Preview Changes

Choose an update method and rate changes to apply to the selected records. If you just want to change the multiplier code and update rates accordingly, select a new multiplier code and leave the other fields blank. You will be able to review the updates on the next page before committing them.

Update Method  
Increase Rates By Value

Pay Rate  
0.25

Bill Rate

Change Multiplier Code To  
Do not change Multiplier Code

Maintain the current markup percentage when changing pay rate  
 Update Assignments

CANCEL    NEXT >

By leaving that option unchecked, the Bill Rate will remain unchanged when submitting the rate changes. By checking that option, the Bill Rate will be updated according to the markup percentage between the Pay and Bill Rates.

Once the changes are entered, click NEXT and you will be able to preview the changes before saving:

Mass Update Rates - Preview Changes

Select Rates
  Preview Changes

2 Records

The changes you see below have not been applied yet. Any records marked with a warning (orange) should be reviewed carefully. Any records marked with an error (red) will not be updated. If you are happy with these changes, press submit to apply them.

There are 0 records with errors.

Job Order Id	Assignment Id	Pay Rate	Bill Rate	Overtime Pay Rate	Overtime Bill Rate	Doubletime Pay Rate	Doubletime Bill Rate	Mu
4295089846	4301406074	25.50 ▶ 26.90	50.00 ▶ 53.75	38.25 ▶ 40.35	75.00 ▶ 80.63	51.00 ▶ 53.80	100.00 ▶ 107.50	No
4295090167	4301405905	25.50 ▶ 26.90	50.00 ▶ 53.75	38.25 ▶ 40.35	75.00 ▶ 80.63	51.00 ▶ 53.80	100.00 ▶ 107.50	No

Rows per page: 20 1-2 of 2 < 1 >

[CANCEL](#)
[< PREVIOUS](#)
[SUBMIT](#)

**\*Note\*** Within the Mass Update Rates - Preview Changes window, there are two flags that can appear that will need to be reviewed before submitting changes:

- For records marked with a warning (orange), these will need to be reviewed carefully. Once these are reviewed and determined to not be an issue, the rate changes can be submitted.
- For records marked with an error (red), these will not be able to be submitted with the rate changes until resolved.

Once all warnings and errors have been resolved, and all records have been inspected for accuracy, click on **SUBMIT** to complete the rate changes.

**\*Note\*** The new rates are able to be seen within the Financials card of the Details tab of the assignment. By only updating assignments, the new rates are not applied to the order(s) that house the updated assignment(s).

### Change the Multiplier Code Being Used

Within the Mass Update Rates - Select Rates window, while keeping the Pay Rate and Bill Rate fields blank, click on the drop-down titled Change Multiplier Code To and select the correct Multiplier Code you would like the assignment(s) rates updated to:

### Mass Update Rates - Select Rates

1 Select Rates ————— 2 Preview Changes

Choose an update method and rate changes to apply to the selected records. If you just want to change the multiplier code and update rates accordingly, select a new multiplier code and leave the other fields blank. You will be able to review the updates on the next page before committing them.

Update Method  
Increase Rates By Value ▾

Pay Rate  
\_\_\_\_\_

Bill Rate  
\_\_\_\_\_


Change Multiplier Code To  
1.25 ✕ ▾

CANCEL NEXT >

Once the changes are entered, click NEXT and you will be able to preview the changes before saving:

### Mass Update Rates - Preview Changes

✓ Select Rates ————— 2 Preview Changes

2 Records  
The changes you see below have not been applied yet. Any records marked with a warning (orange) should be reviewed carefully. Any records marked with an error (red) will not be updated. If you are happy with these changes, press submit to apply them.   
There are 0 records with errors.

Job Order Id	Assignment Id	Pay Rate	Bill Rate	Overtime Pay Rate	Overtime Bill Rate	Doubletime Pay Rate	Doubletime Bill Rate	Mu
4295089846	4301406074	26.90 ▶ 26.90	53.75 ▶ 36.32	40.35 ▶ 40.35	80.63 ▶ 54.47	53.80 ▶ 53.80	107.50 ▶ 72.63	No
4295090167	4301405905	26.90 ▶ 26.90	53.75 ▶ 36.32	40.35 ▶ 40.35	80.63 ▶ 54.47	53.80 ▶ 53.80	107.50 ▶ 72.63	No

Rows per page: 20 ▾ 1-2 of 2 < 1 >

CANCEL < PREVIOUS SUBMIT

**\*Note\*** Within the Mass Update Rates - Preview Changes window, there are two flags that can appear that will need to be reviewed before submitting changes:

- For records marked with a warning (orange), these will need to be reviewed carefully. Once these are reviewed and determined to not be an issue, the rate changes can be submitted.
- For records marked with an error (red), these will not be able to be submitted with the rate changes until resolved.

Once all warnings and errors have been resolved, and all records have been inspected for accuracy, click on SUBMIT to complete the rate changes.

**\*Note\*** The new multiplier code is able to be seen within the Financials card of the Details tab of the assignment. By only updating assignments, the new multiplier code is not applied to the order(s) that house the updated assignment(s).

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

- For more information on adding customer defaults, instructions are within the [Beyond - Customer Defaults](#) article.
- Need to set up new Multiplier Codes? The [Creating Multiplier Codes](#) article has everything you need.

## Mass Update Rates - Orders

The process to mass update rates on orders is nearly identical to that of assignments, although with one major addition.

1. Navigate to the order search and search for the orders that you need to update rates en mass for
2. Select the orders you want to include in your update
3. Select 'Mass Update Rates' option from the search actions menu

The screenshot displays a software dashboard with a blue header. On the left is an 'ACTIVITY PANEL' with sections for 'Bookmarks' (No Bookmarks), 'Recent History' (Dashboard), and a 'Dashboard' button. The main area is titled 'Dashboard' and includes a search bar 'Search Anything...', a 'Personal My Dashboard' dropdown, and a 'DASHBOARD' button. Below this is a 'Tasks' section showing 'No tasks' and a 'GO TO TASKS PAGE' link. On the right is a 'Message Stream' with a 'YESTERDAY' header and three messages: a 'Customer Interview' from 'wc\_admin for Angelucci's Flowers - Forklift (Steve Aardson)' at 2:44 PM, an 'Email' from 'sam.kemp for ABC Broom co - test tested' at 10:52 AM, and two 'Message' entries from 'TW API for Bryan Smith' at 10:11 AM.

## Change the Pay/Bill Rates

Within the Mass Update Rates - Select Rates window, click on the drop-down titled Update Method. You will see three different methods in which the pay/bill rates can be updated:

### 1. Increase Rates By Value

### Mass Update Rates - Select Rates

**1** Select Rates ————— **2** Preview Changes

Choose an update method and rate changes to apply to the selected records. If you just want to change the multiplier code and update rates accordingly, select a new multiplier code and leave the other fields blank. You will be able to review the updates on the next page before committing them.

Update Method  
Increase Rates By Value ▼

---

Pay Rate  
0.25

---

Bill Rate  
0.50

---

Change Multiplier Code To  
Do not change Multiplier Code ▼

---

Update Assignments

CANCEL    [NEXT >](#)

### 2. Increase Rates by Percentage



## Mass Update Rates - Select Rates

1 Select Rates ————— 2 Preview Changes

Choose an update method and rate changes to apply to the selected records. If you just want to change the multiplier code and update rates accordingly, select a new multiplier code and leave the other fields blank. You will be able to review the updates on the next page before committing them.

Update Method

Increase Rates By Percentage ▼

Pay Rate

5.50

Bill Rate

7.50

Change Multiplier Code To

Do not change Multiplier Code ▼

Update Assignments

CANCEL

[NEXT >](#)

### 3. Change Rates To Value

## Mass Update Rates - Select Rates

1 Select Rates ————— 2 Preview Changes

Choose an update method and rate changes to apply to the selected records. If you just want to change the multiplier code and update rates accordingly, select a new multiplier code and leave the other fields blank. You will be able to review the updates on the next page before committing them.

Update Method

Change Rates To Value ▼

Pay Rate

10.10

Bill Rate

13.50

Change Multiplier Code To

Do not change Multiplier Code ▼

Update Assignments

CANCEL

NEXT >

**\*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.

If you choose to only include a new Pay Rate, a new option will appear to 'Maintain the current markup percentage when changing pay rate':

### Mass Update Rates - Select Rates

1 Select Rates ————— 2 Preview Changes

Choose an update method and rate changes to apply to the selected records. If you just want to change the multiplier code and update rates accordingly, select a new multiplier code and leave the other fields blank. You will be able to review the updates on the next page before committing them.

Update Method  
Increase Rates By Value

Pay Rate  
0.25

Bill Rate

Change Multiplier Code To  
Do not change Multiplier Code

Maintain the current markup percentage when changing pay rate  
 Update Assignments

CANCEL NEXT >

By leaving that option unchecked, the Bill Rate will remain unchanged when submitting the rate changes. By checking that option, the Bill Rate will be updated according to the markup percentage between the Pay and Bill Rates.

Once the changes are entered click NEXT and you will be able to preview the changes before saving:

### Mass Update Rates - Preview Changes

1 Select Rates ————— 2 Preview Changes

2 Records  
The changes you see below have not been applied yet. Any records marked with a warning (orange) should be reviewed carefully. Any records marked with an error (red) will not be updated. If you are happy with these changes, press submit to apply them.

There are 0 records with errors.

Job Order Id	Assignment Id	Pay Rate	Bill Rate	Overtime Pay Rate	Overtime Bill Rate	Doubletime Pay Rate	Doubletime Bill Rate	Mu
4295067026		75.00 ▶ 75.25	125.00 ▶ 125.50	112.50 ▶ 112.88	187.50 ▶ 188.25	150.00 ▶ 150.50	250.00 ▶ 251.00	No
4295088748		0.00 ▶ 0.25	0.00 ▶ 0.50	0.00 ▶ 0.38	0.00 ▶ 0.75	0.00 ▶ 0.50	0.00 ▶ 1.00	No

Rows per page: 20 1-2 of 2 < 1 >

CANCEL < PREVIOUS SUBMIT

**\*Note\*** Within the Mass Update Rates - Preview Changes window, there are two flags that can appear that will need to be reviewed before submitting changes:

- For records marked with a warning (orange), these will need to be reviewed carefully. Once these are reviewed and determined to not be an issue, the rate changes can be submitted.
- For records marked with an error (red), these will not be able to be submitted with the rate changes until resolved.

Once all warnings and errors have been resolved, and all records have been inspected for accuracy, click on SUBMIT to complete the rate changes.

**\*Note\*** The new rates are able to be seen within the Financials card of the Details tab of the order. By only updating orders, the new rates are not applied to the assignment(s) that belong to the updated order(s). If you would like for assignments to be updated along with the order(s), this process is explained within the section of this article titled [Update Rates on Assignments Within Orders](#).

## Change the Multiplier Code Being Used

Within the Mass Update Rates - Select Rates window, while keeping the Pay Rate and Bill Rate fields blank, click on the drop-down titled Change Multiplier Code To and select the correct Multiplier Code you would like the order(s) rates updated to:

Mass Update Rates - Select Rates

1 Select Rates ————— 2 Preview Changes

Choose an update method and rate changes to apply to the selected records. If you just want to change the multiplier code and update rates accordingly, select a new multiplier code and leave the other fields blank. You will be able to review the updates on the next page before committing them.

Update Method  
Increase Rates By Value

Pay Rate

Bill Rate

Change Multiplier Code To  
1.47

Update Assignments

CANCEL NEXT >

Once the changes are entered click NEXT and you will be able to preview the changes before saving:

Mass Update Rates - Preview Changes

Select Rates
  Preview Changes

2 Records

The changes you see below have not been applied yet. Any records marked with a warning (orange) should be reviewed carefully. Any records marked with an error (red) will not be updated. If you are happy with these changes, press submit to apply them.

There are 0 records with errors.

Job Order Id	Assignment Id	Pay Rate	Bill Rate	Overtime Pay Rate	Overtime Bill Rate	Doubletime Pay Rate	Doubletime Bill Rate	Mu
4295067026		75.00 ▶ 75.00	125.00 ▶ 110.25	112.50 ▶ 112.50	187.50 ▶ 143.33	150.00 ▶ 150.00	250.00 ▶ 220.50	No
4295088748		0.00 ▶ 0.00	0.00 ▶ 0.00	0.00 ▶ 0.00	0.00 ▶ 0.00	0.00 ▶ 0.00	0.00 ▶ 0.00	No

Rows per page: 20 1-2 of 2 < 1 >

CANCEL < PREVIOUS SUBMIT

**\*Note\*** Within the Mass Update Rates - Preview Changes window, there are two flags that can appear that will need to be reviewed before submitting changes:

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- For records marked with an error (red), these will not be able to be submitted with the rate changes until resolved.

Once all warnings and errors have been resolved, and all records have been inspected for accuracy, click on SUBMIT to complete the rate changes.

**\*Note\*** The new multiplier code is able to be seen within the Financials card of the Details tab of the order. By only updating orders, the new multiplier code is not applied to the assignment(s) that belong to the updated order(s). If you would like for assignments to be updated along with the order(s), this process is explained within the section of this article titled [Update Rates on Assignments Within Orders](#).

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

- For more information on adding customer defaults, instructions are within the [Beyond - Customer Defaults](#) article.
- Need to set up new Multiplier Codes? The [Creating Multiplier Codes](#) article has everything you need.

## Update Rates on Assignments Within Orders

When updating rates/multiplier codes on orders, you will have an additional option to update the same rates/multiplier codes for assignments that are contained within the orders.

1. To update the rates/multiplier codes on the assignments contained within the orders, simply select the check box for Update Assignments

2. You will then have the option to select Only Active Assignments:

- If this option is checked, you will be able to choose the date the assignments were last active. If you would like to update the date being used, click on the Active As Of field and choose the intended date.
- If this option is left unchecked, all assignments within the orders will have their rates/multiplier codes updated, regardless of status:

Search Anything...

### Mass Update Rates - Select Rates

1 Select Rates ————— 2 Preview Changes

Choose an update method and rate changes to apply to the selected records. If you just want to change the multiplier code and update rates accordingly, select a new multiplier code and leave the other fields blank. You will be able to review the updates on the next page before committing them.

Update Method  
Increase Rates By Value

Pay Rate  
0.25

Bill Rate  
0.50

Change Multiplier Code To  
Do not change Multiplier Code

Update Assignments

CANCEL    [NEXT >](#)

7026    Access Operator    ABC Construction    Human Resource    TE

Once the changes are entered click NEXT and you will be able to preview the changes before saving:

## Mass Update Rates - Preview Changes



Select Rates



Preview Changes

### 2 Records

The changes you see below have not been applied yet. Any records marked with a warning (orange) should be reviewed carefully. Any records marked with an error (red) will not be updated. If you are happy with these changes, press submit to apply them.

There are 0 records with errors.



Job Order Id	Assignment Id	Pay Rate	Bill Rate	Overtime Pay Rate	Overtime Bill Rate	Doubletime Pay Rate	Doubletime Bill Rate
4295067026		75.25 ▶ 75.50	110.62 ▶ 111.12	112.88 ▶ 113.25	143.80 ▶ 144.46	150.50 ▶ 151.00	221.24 ▶ 222.24
4295088748		0.25 ▶ 0.50	0.37 ▶ 0.87	0.38 ▶ 0.75	0.48 ▶ 1.13	0.50 ▶ 1.00	0.74 ▶ 1.74

Rows per page: 20 ▼

1-2 of 2



1



CANCEL

< PREVIOUS

SUBMIT

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- For records marked with a warning (orange), these will need to be reviewed carefully. Once these are reviewed and determined to not be an issue, the rate changes can be submitted.
- For records marked with an error (red), these will not be able to be submitted with the rate changes until resolved.

Once all warnings and errors have been resolved, and all records have been inspected for accuracy, click on SUBMIT to complete the rate changes.

**\*Note\*** The new rates/multiplier codes are able to be seen within the Financials card of the Details tab of the order along with the assignment in the event that assignments were updated as well.

## Related Articles