

Beyond - Mass Update Rates

Last Modified on 06/23/2022 12:39 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.

Properties (1 Visible, 41 Not Visible) 40 Selected

Q rates X

Can Mass Update Rates
Allows a user to use the Mass Update Rates tool to update job Order and Assignment financials

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](#)

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:

Search / Assignments

BASIC ADVANCED

Last Name First Name Customer Name Assignment Id

Employee Id Status Active Branch All Service Representative All

RESET SEARCH

Search returned 2706 results

3 selected items Clear Selection

Assignment Id	Last Name	First Name	Customer	Department	Job Title	Bill Rate	Pay Rate	Start Date	End Date	Supervisor
<input checked="" type="checkbox"/>	4301420103	Lee	Faye	Cotton Candy	Smore	Forklift	25.00	25.00	4/13/2020	Staples, M
<input checked="" type="checkbox"/>	4301421177	Stevens	Kendra	Cotton Candy	Smore	Assembler	25.00	20.00	2/14/2022	Staples, M
<input checked="" type="checkbox"/>	4301421365	Smith	Joe	Cotton Candy	Smore	Baker	19.50	15.00	4/4/2022	Staples, M

3. Choose the Mass Update Rates option from the search actions menu:

Search / Assignments

BASIC ADVANCED

Last Name First Name Customer Name Assignment Id

Employee Id Status Active Branch All Service Representative All

RESET SEARCH

Search returned 2706 results

3 selected items Clear Selection

- Email 2 Recipients
- Mass Update Rates**
- Mass Update Assignments
- Assign a New Workflow...
Assign a pre-configured workflow and optionally set the starting step or additional pages.

Assignment Id	Last Name	First Name	Customer	Department	Job Title	Bill Rate	Pay Rate	Start Date	End Date	Supervisor
			Cotton Candy	Smore	Forklift	25.00	25.00	4/13/2020		Staples, M
			Cotton Candy	Smore	Assembler	25.00	20.00	2/14/2022		Staples, M
			Cotton Candy	Smore	Baker	19.50	15.00	4/4/2022		Staples, M

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

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.

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



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 >

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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 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:

Search Job Orders

BASIC ADVANCED

Customer Name Job Order Id Status Active

Filled Either Branch All Service Representative All

RESET SEARCH

Search returned 3749 results

3 selected items Clear Selection

<input type="checkbox"/>	Job Order Id	Job Title	Customer ↑	Department	Job Order Type	Pay Rate	Bill Rate	Start Date	Job Order Status	Positions Required	Positions F
<input checked="" type="checkbox"/>	4295067690	Unit Clerk	Cotton Candy	Strawberry	TE	15.00	22.00	9/4/2017	Active	2	0
<input checked="" type="checkbox"/>	4295067706	Unit Clerk	Cotton Candy	Strawberry	TE	15.00	22.00	9/4/2017	Master	1	0
<input checked="" type="checkbox"/>	4295089217	Cocktail Bartender	Cotton Candy	Strawberry	TE	15.00	0.00	6/4/2018	Unfilled	1	0
<input type="checkbox"/>	4295088778	Data Entry Clerk	Cotton Candy	Strawberry	TE	15.00	0.00		Unfilled	1	0
<input type="checkbox"/>	4295123741	Assembler	Cotton Candy	Strawberry	TE	0.00	0.00	5/13/2021	Filled	1	1

3. Select 'Mass Update Rates' option from the search actions menu:

Search Job Orders

BASIC ADVANCED

Customer Name Job Order Id Status Active

Filled Either Branch All Service Representative All

RESET SEARCH

Search returned 3749 results

3 selected items Clear Selection

Mass Update Rates

<input checked="" type="checkbox"/>	Job Title	Customer ↑	Department	Job Order Type	Pay Rate	Bill Rate	Start Date	Job Order Status	Positions Required	Positions F	
<input checked="" type="checkbox"/>	4295067690	Unit Clerk	Cotton Candy	Strawberry	TE	15.00	22.00	9/4/2017	Active	2	0
<input checked="" type="checkbox"/>	4295067706	Unit Clerk	Cotton Candy	Strawberry	TE	15.00	22.00	9/4/2017	Master	1	0
<input checked="" type="checkbox"/>	4295089217	Cocktail Bartender	Cotton Candy	Strawberry	TE	15.00	0.00	6/4/2018	Unfilled	1	0

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

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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 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
 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 ▶ 75.00	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

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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

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/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