

# Beyond - How to Create and Utilize Rate Sheets

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A rate sheet is a tool that can be used to set up permanent pay and/or bill rates for orders/assignments created for a specific employee, customer, job title, shift, worksite, or branch.

## This Article Covers:

- [When to Use Rate Sheets](#)
- [Setting Up Permissions](#)
- [How to Create Rate Sheets](#)
- [Using Rate Sheets on Orders](#)
- [Deactivating Rate Sheets](#)

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## When to Use Rate Sheets

The rate sheet is a great option for users that *sign agreements with customers which have an agreed upon pay rate and bill rate*. For example, perhaps we agree that any time we place 12 Hour Nurse temps at 123 Nursing, the bill rate is \$45.00/hr and the pay rate is \$25.00/hr. I can assure that *every service rep will always respect that agreement by establishing a rate sheet*.

With a rate sheet saved to the customer record, whenever an order is created for a 12 Hour Nurse temp at 123 Nursing, *viola!* our rate sheet is triggered, and the financial details automatically post fill into the order like magic!

**\*Note\*** Rate Sheets will not be applied to job orders with the type of Direct Hire.

**\*Note\*** If your agreements with customers stipulate a *markup and not a dollar amount*, consider setting up multiplier codes. Please see the following article titled [Beyond - Managing Customer Defaults](#) for more information on the use of multiplier codes in Beyond.

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## Setting Up Permissions

If you utilize Standard Security Groups, you will need to have the following permissions added to your Security Groups:

- Can administrate rate sheets

- Can modify rates that were set by a rate sheet

Permissions (2 Visible, 54 Not Visible)

55 Selected

rate sheet

- Can administrate rate sheets  
Allows a user to create, edit, and delete rate sheets.
- Can modify rates that were set by a rate sheet  
Allows a user to modify rates on a job order or assignment which were set by a rate sheet.

**\*Note\*** If you utilize custom Security Groups with Advanced Permissions, you will need to add the Read/Write access to the "Rate Sheet" fields within Employee/Customer/Job Order/Assignment, along with Access to the "Rate Sheet" page to the Security Groups that require the functionality.

The required fields/forms/pages can be found by searching "Rate Sheet" when creating/editing a Security Group with Advanced Permissions:

The screenshot shows a search interface for 'rate sheet' with two tabs: 'BY PAGE' (selected) and 'BY FIELD'. A search bar contains 'rate sheet' and a close button. A toggle switch for 'Selecting a parent selects children' is checked. The results are organized into expandable sections for 'Employee', 'Pay Setup', 'Customer', 'Defaults', 'Job Order', 'Visifile', and 'Financials'. Each section contains a 'Rate Sheets (1)' entry with a 'Page' label and a checked 'Access' checkbox.

For more information on created custom Security Groups with Advanced Permissions, please see the following article titled "[Beyond - Creating Security Groups with Advanced Permissions](#)".

## How to Create a Rate Sheet

Begin by navigating to B Menu > Records > Rate Sheets:

**\*Note\*** Rate Sheets can also be created directly from the customer/department and employee record:

- Rate Sheets can be applied to a customer/department record by navigating to Customer > Defaults > Rate Sheets:

[VISIFILE](#) [DETAILS](#) [DEFAULTS](#) [DOCUMENTS](#) [INVOICE HISTORY](#) [INVOICE SETUP](#) [MESSAGES](#) [CUSTOM DATA](#)

[Worksite](#) [Employee](#) [Job Title](#) [Branch](#) [Shift](#)

Search returned 2 results + ADD RATE SHEET

	Customer Name	Department Name	Worksite	Job Title	Employee Name	Branch	Shift Name	Worker Comp Co...	Multiplier Co...	Apply rate sheet t...
▼	123 Nursing	Primary		12 hour Nurse			Evening		None	✓
▼	123 Nursing	Primary		12 hour Nurse			Morning		None	✓

Rows per page: 20 1 of 2 < 1 >

- Rate Sheets can be applied to an employee record by navigating to Employee > Pay Setup > Rate Sheets:

[VISIFILE](#) [DETAILS](#) [DOCUMENTS](#) [MESSAGES](#) [JOB MATCHING](#) [ASSIGNMENTS](#) [STORY](#) [REFERENCES](#) [PAY SETUP](#) [ONBOARDING](#) [PAY HISTORY](#) [CUSTOM DATA](#)

[Customer](#) [Worksite](#) [Job Title](#) [Branch](#) [Shift](#)

Search returned 0 results + ADD RATE SHEET

No rate sheets

[Dashboard](#) [Records](#) [Reports](#) [Resume Management](#) [Time Entry](#) [User Settings](#) [System Settings](#) [Help](#) [Log Out](#)

- Employees
- Customers
- Contacts
- Assignments
- Job Orders
- Prospects
- Vendors
- Interviews
- Required Documents
- Onboarding
- Web Users
- Rate Sheets**
- Background Checks
- E-Verify Cases
- Near Me

[Worksite](#) [Employee](#) [Job Title](#) [Branch](#) [Shift](#)

Search returned 0 results + ADD RATE SHEET

	Customer Name	Department Name	Worksite	Job Title	Employee Name	Branch	Shift Name	Worker Comp Co...	Multiplier Co...	Apply rate sheet t...
		Primary						8810	None	✓
								0000 (MN)	None	✓
								Code	None	✓
			72 Accounting Building						1.25	✓
		Primary		Agent			Morning	Q41	None	✓

**\*Note\*** All "Active" Rate Sheets will appear within this window. Deactivated Rate Sheets will not appear.

You will need to re-create any previously deactivated Rate Sheets.

To create a new rate sheet, select the "+ Add Rate Sheet" option in the upper right-hand corner of the screen. This will open the "Add Rate Sheet" window:

### Add Rate Sheet

At least one of the following fields is required: Employee, Customer, Job Title, Shift, Branch

**Criteria**

Employee	Job Title
Any	Any
Customer	Shift
Any	Any
Worksite	Branch
Any	Any

Apply rate sheet to departments

**Rates**

Rates will populate Financials on newly created matching Job Orders and Assignments.

* Multiplier Code	* Overtime Factor
None	1.5
Pay Rate	Bill Rate
0.00	0.00
Overtime Pay Rate	Overtime Bill Rate
0.00	0.00
Doubletime Pay Rate	Doubletime Bill Rate
0.00	0.00
Unit Pay Rate	Unit Bill Rate

SAVE AS DRAFT CANCEL SUBMIT

The criteria established here determines when a rate sheet should be triggered to display on an order. So, ask yourself "What needs to happen before this rate sheet should display on an order?" Your rate sheet criteria can be as broad or as specific as you would like.

Following our example, let's say our customer 123 Nursing has agreed to a shift differential for "12 Hour Nurse" temps.

- 1st shift (morning) employees will be paid \$25.00/hr and billed \$45.00/hr
- 2nd shift (evening) employees will be paid \$28.00/hr and billed \$48.00/hr


## Add Rate Sheet

### Criteria

Employee	Job Title
Any	12 hour Nurse
Customer	Shift
123 Nursing - Primary	Morning
Worksite	Branch
Any	Any

Apply rate sheet to departments

### Rates

 Rates will populate Financials on newly created matching Job Orders and Assignments.

* Multiplier Code	* Overtime Factor
None	1.5
Pay Rate	Bill Rate
25.00	45.00
Overtime Pay Rate	Overtime Bill Rate
37.50	67.50
Doubletime Pay Rate	Doubletime Bill Rate
50.00	90.00
Unit Pay Rate	Unit Bill Rate
0.00	0.00
Other Agency Pay	Worker Comp Code
0.00	
	Estimated Margin
	11 11%

SAVE AS DRAFT

CANCEL [SUBMIT](#)

The criteria to establish would be the customer (123 Nursing), the job title (12 Hour Nurse) and the shift. However, because there are *two different shifts with two different rates*, we need to *create two individual rate sheets*:

### Add Rate Sheet

Criteria

Employee: Any | Job Title: 12 hour Nurse

Customer: 123 Nursing - Primary | Shift: Evening

Worksite: Any | Branch: Any

Apply rate sheet to departments

Rates

*i* Rates will populate Financials on newly created matching Job Orders and Assignments.

\* Multiplier Code: None | \* Overtime Factor: 1.5

Pay Rate: 28.00 | Bill Rate: 48.00

Overtime Pay Rate: 42.00 | Overtime Bill Rate: 72.00

Doubletime Pay Rate: 56.00 | Doubletime Bill Rate: 96.00

Unit Pay Rate: 0.00 | Unit Bill Rate: 0.00

Other Agency Pay: 0.00 | Worker Comp Code: [dropdown]

Estimated Margin: **41 67%**

SAVE AS DRAFT | CANCEL | **SUBMIT**

Once the information has been entered into the required fields, select "Submit" for the Rate Sheet to be saved and able to be applied to newly created job order and assignment records associated with the selected customer/departments.

Search / Rate Sheets

Customer [dropdown] Worksite [dropdown] Employee [dropdown] Job Title [dropdown] Branch [dropdown] Shift [dropdown]

Search returned 102 results + ADD RATE SHEET

Customer Name	Department Name	Worksite	Job Title	Employee Name	Branch	Shift Name	Worker Comp Co...	Multiplier Co...	Apply rate sheet...
123 Nursing	Primary		12 hour Nurse			Evening		None	✓
123 Nursing	Primary		12 hour Nurse			Morning		None	✓

Selecting the drop down to the left of the Rate Sheet will also expand it's details:

Search Rate Sheets

Customer Worksite Employee Job Title Branch Shift

Search returned 103 results + ADD RATE SHEET

Customer Name	Department Name	Worksite	Job Title	Employee Name	Branch	Shift Name	Worker Comp Co...	Multiplier Co...	Apply rate sheet to de...
123 Nursing	Primary		12 hour Nurse					None	

**Rate Sheet Detail**

Pay Rate 25.00	Overtime Pay Rate 37.50
Doubletime Pay Rate 50.00	Unit Pay Rate 0.00
Other Agency Pay 0.00	Bill Rate 45.00
Overtime Bill Rate 67.50	Doubletime Bill Rate 90.00
Unit Bill Rate 0.00	Overtime Factor 1.5
Doubletime Factor 2	Gross profit percent 44.44%

## Using Rate Sheets on Orders

When an order is created for a customer that has rate sheets established, the process of inputting information in your order will automatically trigger the rate sheet.

**\*Note\*** In the event a single Rate Sheet is found that matches the necessary criteria for the job order, you will not be prompted to select the Rate Sheet when creating the job order record. The Rate Sheet will automatically apply.

Following our example, when we input the job title "12 Hour Nurse", and specify that it is a morning shift opening, the financial details alert us that a rate sheet match was found and offers to apply the rates:

Job Information - Apply Rate Sheet

1 Job Information 2 Apply Rate Sheet

**i** The following Rate Sheets match your new selections, **12 hour Nurse** and **Morning**. Select a Rate Sheet to be applied.

This change may cause an update to the Financials.

Weight	Bill	45.00	Pay	25.00
21	OT Bill	67.50	OT Pay	37.50
Multiple	DT Bill	90.00	DT Pay	50.00

SAVE AS DRAFT CANCEL < PREVIOUS SUBMIT

It is possible that *more than one rate sheet can be triggered on an order*. For example, let's say 123 Nursing has two rate sheets:

- Rate Sheet 1 Criteria: Job Title - "12 Hour Nurse"

- Rate Sheet 2 Criteria: Job Title - "12 Hour Nurse" and Shift - "Morning"

When an order is created for a Morning shift 12 Hour Nurse temp, two rate sheets will be triggered! So how do you know which one to use? The weight. The weight is the result of a scoring process to see how well a rate sheet matches your order. The higher the weight, the better the match.

By default, Beyond will always recommend the higher scoring Rate Sheet:

Job Information - Apply Rate Sheet

✓ Job Information
2 Apply Rate Sheet

**i** The following Rate Sheets match your new selections, **12 hour Nurse** and **Morning**. Select a Rate Sheet to be applied.

This change may cause an update to the Financials.

Weight	Bill	45.00	Pay	25.00
21	OT Bill	67.50	OT Pay	37.50
Multiple	DT Bill	90.00	DT Pay	50.00

Weight	Bill	45.00	Pay	25.00
20	OT Bill	67.50	OT Pay	37.50
Multiple	DT Bill	90.00	DT Pay	50.00

SAVE AS DRAFT
CANCEL < PREVIOUS SUBMIT

**How weight is determined:**

Criteria	Weight Value
Employee	64
Customer	16
Worksite	8
Job Title	4
Branch	2
Shift	1

Once the appropriate Rate Sheet has been chosen, select "Submit" to apply the Rate Sheet to the job order.

Once a Rate Sheet has been selected for a job order, it can be updated by navigating to Job Order > Details > Financials Card > Change Rate Sheet:



Job Board Options			
Time Clock			
Financials			
Multiplier Code None	Pay Periods 52		
Bill Rate 45.00	Pay Rate 25.00		
Unit Bill Rate 0.00	Unit Pay Rate 0.00		
Overtime Factor 1.5000	Overtime Plan 4/10		
Overtime Bill Rate 67.50	Overtime Pay Rate 37.50		
Doubletime Bill Rate 90.00	Doubletime Pay Rate 50.00		
GP Percent 38.594444%	Desired GM % --		
GP Estimate 2,778.80	<a href="#">Change Rate Sheet &gt;</a>		

## Using Rate Sheets on Assignments

When creating an assignment for a job order that has Rate Sheets applied, you will be prompted to select the appropriate Rate Sheet just like when setting up the job order record:

Apply Rate Sheet

Apply a Rate Sheet to your new Assignment. Click "cancel" to skip this step.

Weight	Bill	45.00	Pay	25.00
21	OT Bill	67.50	OT Pay	37.50
Multiple	DT Bill	90.00	DT Pay	50.00

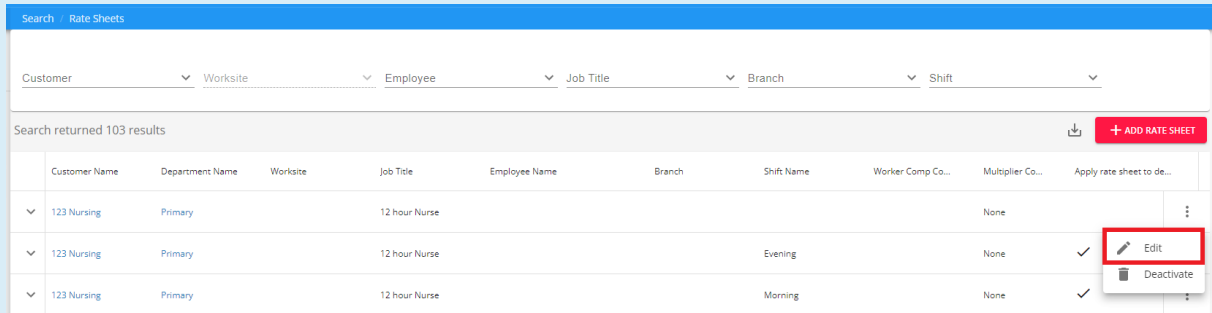
Weight	Bill	45.00	Pay	25.00
20	OT Bill	67.50	OT Pay	37.50
Multiple	DT Bill	90.00	DT Pay	50.00

SAVE AS DRAFT CANCEL [SUBMIT](#)

Once a Rate Sheet has been selected for an assignment, it can be updated by navigating to Assignment > Details > Financials Card > Change Rate Sheet:

VISIFILE DETAILS ▼ MESSAGES CUSTOM DATA	
Employee Contact Methods	
Other Contact Methods	
Financials	
Multiplier Code None	Overtime Factor 1.5000
Bill Rate 45.00	Pay Rate 25.00
Salary Bill Rate 0.00	Salary Pay Rate 0.00
Unit Bill Rate 0.0000	Unit Pay Rate 0.0000
Overtime Bill Rate 67.50	Overtime Pay Rate 37.50
Doubletime Bill Rate 90.00	Doubletime Pay Rate 50.00
Worker Comp Code Tx8742	W-2 Yes
Employer High Tech & Staffing Services, Inc	Vendor High Tech & Staffing Services, Inc
Burden --	PO Number 12983
Payroll Note --	<a href="#">Change Rate Sheet &gt;</a>

**\*Note\*** Rate Sheets can be edited from B Menu > Records > Rate Sheets, selecting the  icon to the right of the Rate Sheet, and selecting "Edit":



Search / Rate Sheets

Customer Worksite Employee Job Title Branch Shift

Search returned 103 results + ADD RATE SHEET

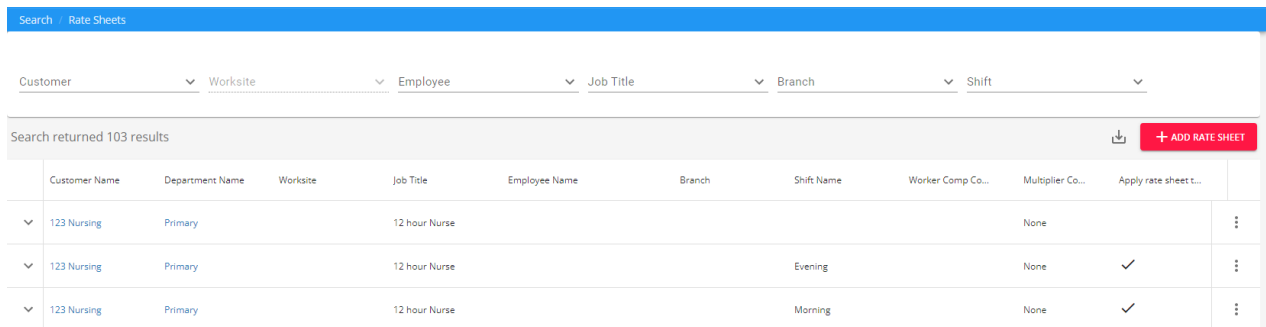
	Customer Name	Department Name	Worksite	Job Title	Employee Name	Branch	Shift Name	Worker Comp Co...	Multiplier Co...	Apply rate sheet to de...
▼	123 Nursing	Primary		12 hour Nurse					None	⋮
▼	123 Nursing	Primary		12 hour Nurse			Evening		None	✓ <span>Edit</span>
▼	123 Nursing	Primary		12 hour Nurse			Morning		None	✓ <span>Deactivate</span>

**\*Note\*** In the event rates were updated on a Rate Sheet after it has been applied to job orders and assignments, the updated rates will not retroactively apply to the existing job orders and assignments.

## Deactivating Rate Sheets

Rate Sheets can be deactivated when they are no longer going to be used.

Navigate to B Menu > Records > Rate Sheets:




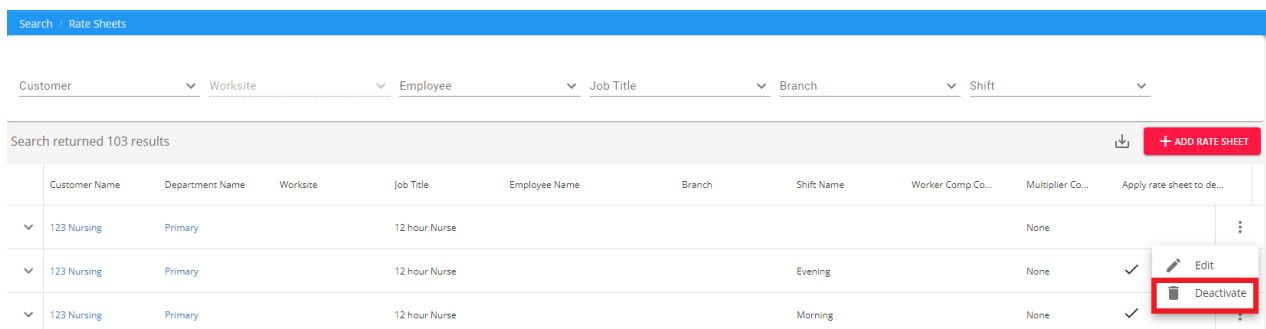
Search / Rate Sheets

Customer Worksite Employee Job Title Branch Shift

Search returned 103 results + ADD RATE SHEET

	Customer Name	Department Name	Worksite	Job Title	Employee Name	Branch	Shift Name	Worker Comp Co...	Multiplier Co...	Apply rate sheet t...
▼	123 Nursing	Primary		12 hour Nurse					None	⋮
▼	123 Nursing	Primary		12 hour Nurse			Evening		None	✓
▼	123 Nursing	Primary		12 hour Nurse			Morning		None	✓

Select the  icon to the right of the Rate Sheet you would like to deactivate and select "Deactivate":



Search / Rate Sheets

Customer Worksite Employee Job Title Branch Shift

Search returned 103 results + ADD RATE SHEET

	Customer Name	Department Name	Worksite	Job Title	Employee Name	Branch	Shift Name	Worker Comp Co...	Multiplier Co...	Apply rate sheet to de...
▼	123 Nursing	Primary		12 hour Nurse					None	⋮
▼	123 Nursing	Primary		12 hour Nurse			Evening		None	✓ <span>Deactivate</span>
▼	123 Nursing	Primary		12 hour Nurse			Morning		None	✓

Select "Confirm" within the prompt to deactivate the Rate Sheet:

### Confirm Rate Sheet Deactivation

Deactivated Rate Sheet will no longer be available to select on matching Job Orders or Assignments.

**This action cannot be undone.**

Are you sure you want to continue?

CANCEL **CONFIRM**

**\*Note\*** Deactivated Rate Sheets that were previously applied to job order and assignment records will have their rate information remain on those job order and assignment records. A deactivated Rate Sheet will simply not be able to be selected for use any longer.

**\*Note\*** Once a Rate Sheet has been deactivated, it cannot be reactivated through Beyond.

If you need a Rate Sheet reactivated, please re-create the Rate Sheet within Beyond.

## Related Articles