

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](#)

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.

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.

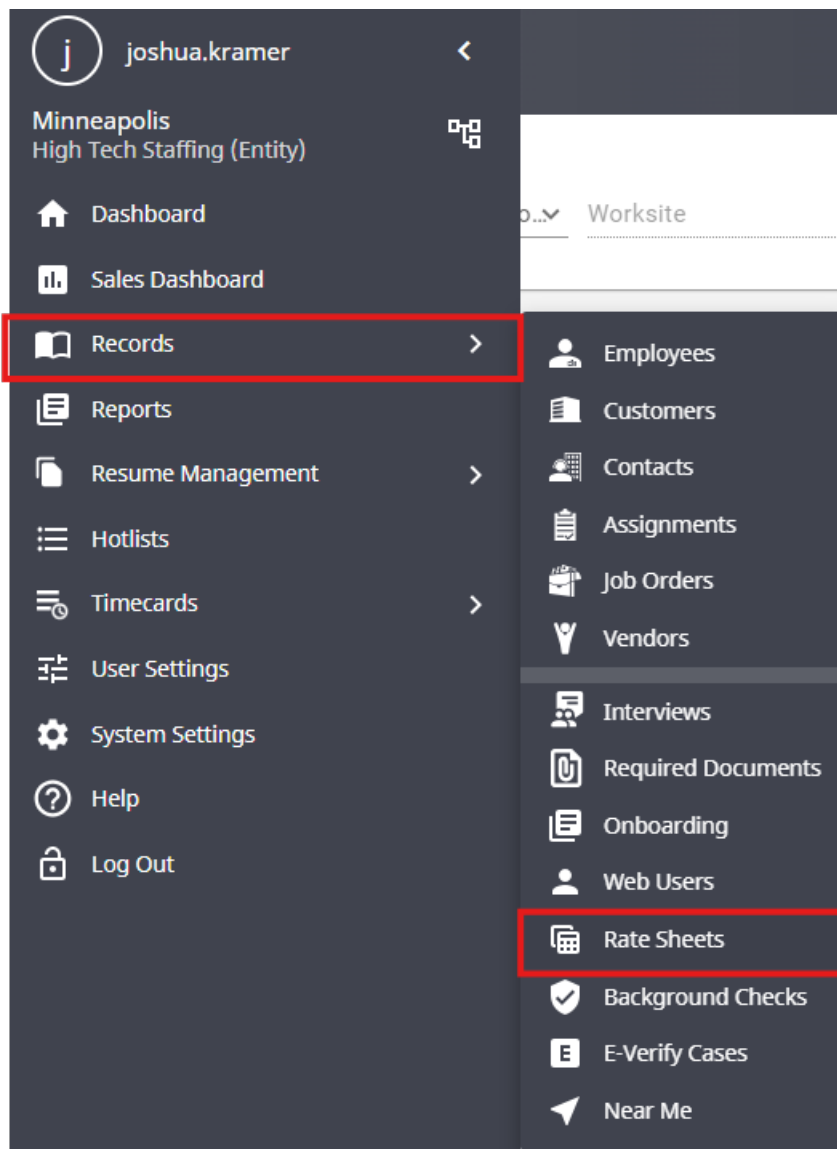
The required fields/forms/pages can be found by searching "Rate Sheet" when creating/editing a Security Group with Advanced Permissions:

BY PAGE	BY FIELD	Selecting a parent selects children <input checked="" type="checkbox"/>
🔍 rate sheet	✕	
^ Employee		<input checked="" type="checkbox"/> Access
^ Pay Setup		
▼ Rate Sheets (1) Page		<input checked="" type="checkbox"/> Access
^ Customer		<input checked="" type="checkbox"/> Access
^ Defaults		
▼ Rate Sheets (1) Page		<input checked="" type="checkbox"/> Access
^ Job Order		<input checked="" type="checkbox"/> Access
^ Visifile Page		<input checked="" type="checkbox"/> Access
^ Expense Form		<input checked="" type="checkbox"/> Access

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:

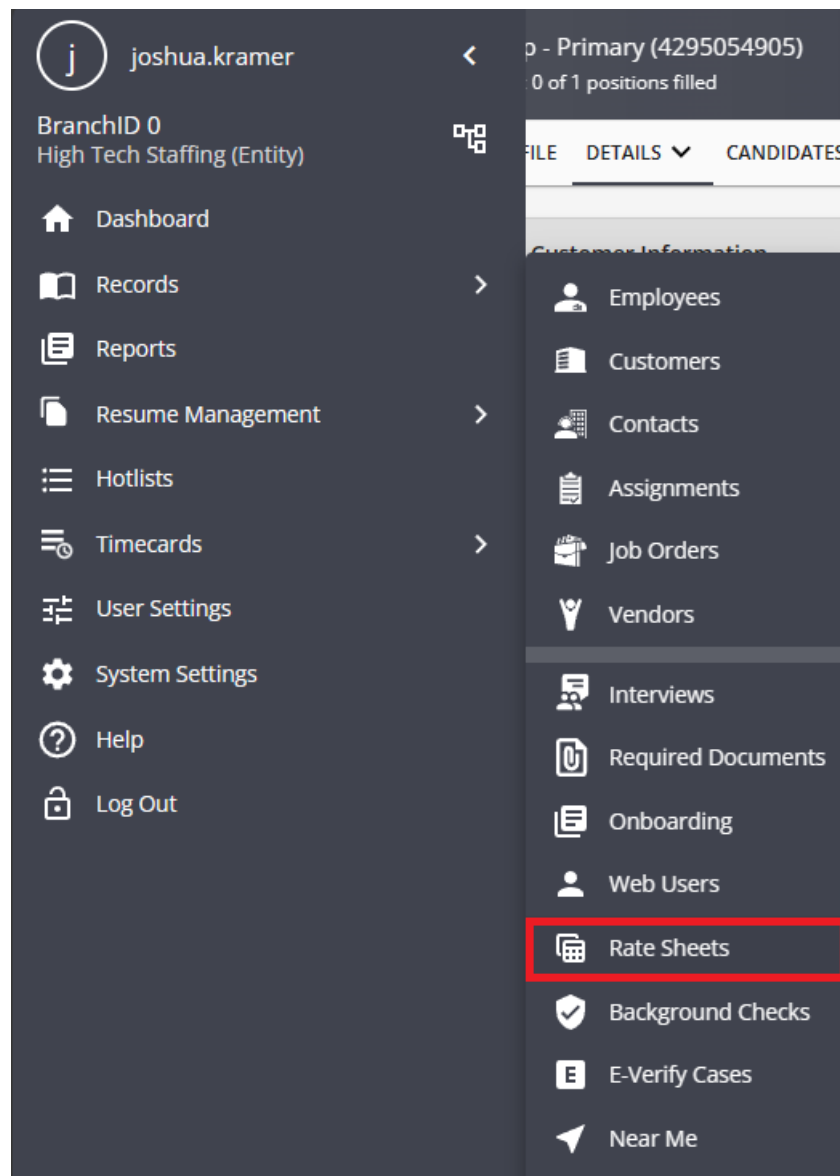
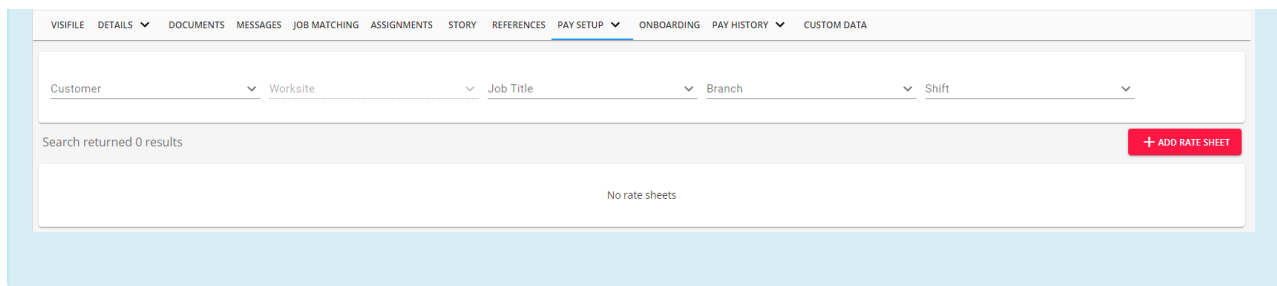


Note Rate Sheets can also be created directly from the customer/department and employee record:

- 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 ▾							
										+ ADD RATE SHEET
2 results										
	Customer Name	Department Name	Worksite	Job Title	Employee Name	Branch	Shift Name	Worker Comp Code	Multiplier Code	Apply rate s...
+	Floyd's Farming	Primary		General Laborer	Sterling Archer				1.4	
+	Floyd's Farming	Primary		Welder				None		

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



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

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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

Any



Job Title

12 hour Nurse



Customer

123 Nursing - Primary



Shift

Morning



Worksite

Any



Branch

Any



☒ Apply rate sheet to departments

Rates



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

* Multiplier Code

None



* Overtime Factor

1.5



Pay Rate

25.00

Bill Rate

45.00

Overtime Pay Rate

37.50

Overtime Bill Rate

67.50

Doubletime Pay Rate

50.00

Doubletime Bill Rate

90.00

Unit Pay Rate

0.00

Unit Bill Rate

0.00

Other Agency Pay

0.00

Worker Comp Code



Estimated Margin

11 11%

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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

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

Estimated Margin

11.67%

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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.

VISIFILE DETAILS SYSTEMIQ DEFAULTS DOCUMENTS INVOICE HISTORY INVOICE SETUP MESSAGES CUSTOM DATA										
Worksite			<div>Employee Job Title Branch Shift</div>							
										<div>+ ADD RATE SHEET</div>
										<div>3 results</div>
	Customer Name	Department Name	Worksite	Job Title	Employee Name	Branch	Shift Name	Worker Comp Code	Multiplier Code	Apply rate s...
+	123 Nursing	Primary		12 hour Nurse			Morning		None	<div></div>
+	123 Nursing	Primary		12 hour Nurse			Evening		None	<div></div>
+	123 Nursing	Primary		12 hour Nurse					None	<div></div>

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

										3 results	
	Customer Name	Department Name	Worksite	Job Title	Employee Name	Branch	Shift Name	Worker Comp Code	Multiplier Code	Apply rate s...	
—	123 Nursing	Primary		12 hour Nurse			Morning		None	✓	⋮
Rate Sheet Detail											
Pay Rate				Overtime Pay Rate							
25.00				37.50							
Doubletime Pay Rate				Unit Pay Rate							
50.00				0.00							
Other Agency Pay				Bill Rate							
0.00				45.00							
Overtime Bill Rate				Doubletime Bill Rate							
67.50				90.00							
Unit Bill Rate				Overtime Factor							
0.00				1.5							
Doubletime Factor				Gross profit percent							
2				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

✓ Job Information

2 Apply Rate Sheet

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

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< 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

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

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< 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	Change Rate Sheet >	

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

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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 --	Change Rate Sheet >

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":












VISIFILE DETAILS ▾ DEFAULTS ▾ DOCUMENTS INVOICE HISTORY INVOICE SETUP ▾ MESSAGES CUSTOM DATA										
Worksite						Employe...	Job Title	Branch	Shift	▾
										+ ADD RATE SHEET
										2 results 
	Customer Name	Department Name	Worksite	Job Title	Employee Name	Branch	Shift Name	Worker Comp Code	Multiplier Code	Apply rate s...
+	Floyd's Farming	Primary		General Laborer	Sterling Archer				1.4	 
+	Floyd's Farming	Primary		Welder					None	 
										 Edit  Deactivate  Gross Profit Calculator


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:

Custo... Worksite										
						Employe...	Job Title	Branch	Shift	▾
										+ ADD RATE SHEET
										864 results 
	Customer Name	Department Name	Worksite	Job Title	Employee Name	Branch	Shift Name	Worker Comp Code	Multiplier Code	Apply rate s...
+	Skynet	Primary	Primary		Todd Packer				1.85/1.80 OT	 
+	Floyd's Farming	Primary		General Laborer	Sterling Archer				1.4	 
+				Maintenance Repair	SOFTWARE STAFFING	Memphis CA		9803	None	 
+				Maintenance Manager	SOFTWARE STAFFING				None	 
+				Accountant	sandy cheeks		12 hrs day	MN 8810	None	 

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

+	Floyd's Farming	Primary		General Laborer	Sterling Archer				1.4	 
+				Maintenance Repair	SOFTWARE STAFFING	Memphis CA		9803	None	 
+				Maintenance Manager	SOFTWARE STAFFING				None	 
+				Accountant	sandy cheeks		12 hrs day	MN 8810	None	 
										 Edit  Deactivate  Gross Profit Calculator

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