

Service Price Increase Utility

The Service Price Increase Utility allows you to update the service price across multiple Service Setups, Renewals, Programs, and Service Orders at the same time. You can also use this utility to print or email Price Increase Letters and exempt certain Locations from Price Increases.

This document covers the following:

- [Configure Service Setups, Renewals, and Programs for Service Price Increase](#)
- [Running the Service Price Increase Utility](#)
- [Printing or Emailing Price Increase Letters](#)
- [Turning off Price Increases for Specific Accounts](#)

Configure Service Setups, Renewals, and Programs for Service Price Increase

Service Setups/Renewals

Go to the specific Service Setup / Renewal and check the *Increase Price* checkbox to enable a Service Setup or Renewal for Service Price Increase.

The screenshot shows a form with various fields for configuring a service setup. The 'Increase Date' field is highlighted with a red box. The form includes fields for Schedule, Active, Charge, PO#, PO Expiration, Division, Source, GL Code, Start Date, Route, Targets, Measurement, Duration, Sch. Color, Skip Months, Next Gen, Last Gen, Next Service, Increase Price, Expiration Date, Cancel Date, Cancel Reason, and Comm. Start.

Programs

Go to the specific Program and check the *Increase Price* checkbox to enable a Program Step for a Price Increase. Do this for every Program Step to increase the overall price of the Program.

Program

Location: **4013** Bill-To: **4013**
Richard Nelson **Richard Nelson**
 1901 Edwards Ln 1901 Edwards Ln
 Toms River, NJ 08753 Toms River, NJ 08753

918-888-8888 918-888-8888

	Current	30 Days	60 Days
S2 - On Alert Sent To Agency	0.00	0.00	0.00

Location Branch: Main Program Branch: Main

Program Type: **GOLD LAWN**

Range Type: Offset Days Start on: 01/01

Include	Service	Description
<input checked="" type="checkbox"/>	LCA 1	fertilization with crabgrass
<input checked="" type="checkbox"/>	LCA 2	fertilization with broadleaf
<input checked="" type="checkbox"/>	LCA 3	fertilization with turf
Select All		

Active: Start Date:
 Charge: Service Order Expiration Date:
 Cancel Date:

Program Step

Location: **4013** Bill-To: **4013**
Richard Nelson **Richard Nelson**
 1901 Edwards Ln 1901 Edwards Ln
 Toms River, NJ 08753 Toms River, NJ 08753

918-888-8888 918-888-8888
 [Change Bill-To]

Past Due	Current	30 Days	60 Days	90 Days
S2 - On Alert Sent To Agency	0.00	0.00	0.00	278.00

Location Branch: Main Setup Branch: Main Bill-To:

Service: LCA 1 Description: fertilization with crabgrass

Attributes: (None) [Select Areas](#)

Locked: Unscheduled: Charge: Service Order PO
 Time: AM Route: PO
 Time Range: Targets: (None) Div
 Duration: 03:00 Measurement: So
 Sch. Color: GL
 Skip Months: Jan Feb Mar Apr May Jun Jul Aug Sep
 Next Service: 01/01/2017 Increase Date: Co
 Last Service: 01/01/2016 Increase Price: Co

Running the Service Price Increase Utility

To run the Service Price Increase Utility, complete the following steps:

1. Go to *Menu > Tools > Service Price Increase* and click *Create a New Batch*.

Menu Advanced Search

- Sales & Marketing > Utilities
 - Service Price Increase**
 - Data Import Utility
 - Data Update Tools
 - Export Sentricon Data
 - DataLink
- Service & Scheduling >
- Field Ops >
- Billing > Miscellaneous
 - Email Queue
 - CallAhead Queue
 - Company Documents
 - Copesan Tools
 - Task Manager
 - Employee In/Out Board
 - Visual Navigator
- Tools** >
- Reports >
- Settings >

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Create New Batch...

Last Price Increase

Batch #: 1066
 Opened On: 9/14/2018 11:25:59 AM
 Started At: 9/14/2018 11:26:05 AM
 Completed At: 9/14/2018 11:26:08 AM
 Owner: ADMN
 Branch: t'3'a
 Count: 1

[View Report](#)



2. On the Price Increase Search screen, you have a variety of options:

The screenshot shows the 'Price Increase Search' interface. On the left, the 'Selection Criteria' section is highlighted with a red box and contains various search filters such as Location Code, Branch, Service, and dates. On the right, the 'Include' section is also highlighted with a red box and contains checkboxes for Service Order, Invoices, Productions, Pre-Bills, Splits, Payment Plans, Each, and Credit Cards. Below the 'Include' section, the 'Increase' section is highlighted with a red box and contains radio buttons for Service Amount, Billing Amount, and Both.

- *Selection Criteria*: find the services eligible for the Service Price Increase
- *Include* checkboxes: increase Service Setups with specific Charge Types

- *Increase* radio buttons: increase the Service Amount only, the Billing amount only, or both the Service Amount and the Billing Amount

Setup Type: Setups Renewals Programs

Include Open Orders

Starting Work Date:

Ending Work Date:

* One-time orders will not be updated.

Setup Status: Active Inactive Both

Total Billed Amount Criteria

Billing Start Date:

Billing End Date:

Starting Total Billed Amount:

Ending Total Billed Amount:

- *Include Open Orders*: add open Service Orders within a range of Work Dates to the Service Price Increase
- *Total Billed Amount criteria*: include the Billing Amount in your Service Price Increase

Note: You will only need this for Service Setups that have the Charge Types of Split, Each, Payment Plan, and Credit Card (where the Billing Amount is separated from the Service Amount).

Starting Last Increase Date:

Starting Last Increase Amount:

Ending Last Increase Date:

Ending Last Increase Amount:

Include accounts with no previous price increases

- *Last Increase criteria*: include Locations based on the last time they had a Service Price Increase as well as including accounts that have never had a Service Price Increase

Increase:

to \$

by %

by \$

Increase Additional Line Items

Round to the Nearest Dollars Cents

Round Prices Up

Update Price Increase Date

to

by months

Log to Price Increase History

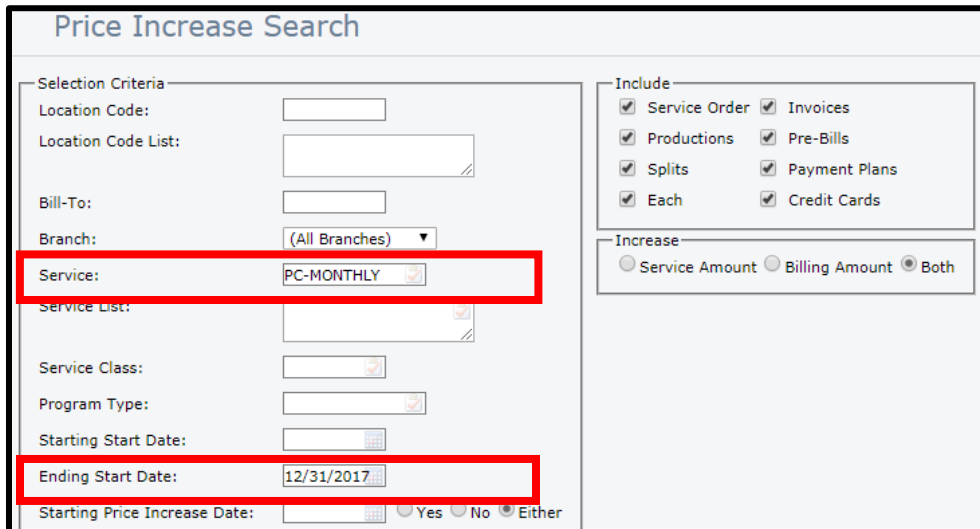
- Final section to determine the actual change to the Service Price
 - Increase: Increase the price
 - To a given dollar amount;
 - By a given percentage;
 - By a given dollar amount.
 - Increase Additional Line Items: adjusts the price of all service line items in a Service Setup, Renewal, or Program Step
 - Round to the Nearest: set the nearest dollar amount or cent amount if the Service Price Increase ends up being less than \$1 or \$0.01
 - Round Prices Up: increase the price to the highest dollar or cent if the final Service Price is slightly over the set rounding amount

Example: A Service Price Increase calculates at \$2.103. Normally, rounding to the nearest cent would result in a \$2.10 increase, while rounding to the nearest dollar would result in a \$2.00 increase. By checking Round Prices Up, the \$2.103 calculation would round up to \$2.11 or \$3.00.
 - Update Price Increase Date: adjust the Increase Date value on Service Setups, Renewals, and Program Steps
 - To a given date;
 - By a given number of months.
 - Log to Price Increase History: documents this Service Price Increase to the specific Service Price Increase History of the adjusted Service Setup, Renewal, or Program Step

Let's take a look at an actual example!

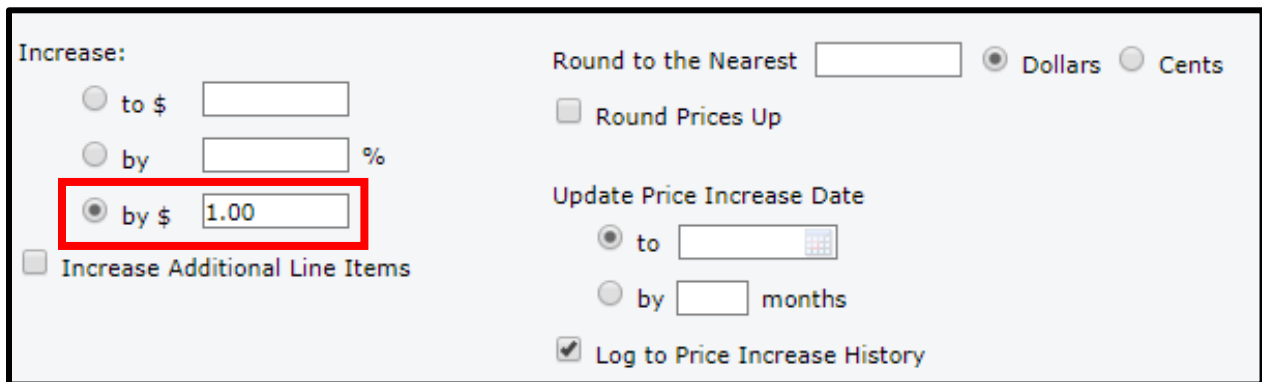
In the example below, we are increasing the price for any setups, renewals, or programs of PC-MONTHLY that have a start date before this year. The price will increase by \$1 to account for an increase in the company's material costs.

1. Select the Service Code of *PC-MONTHLY*, and enter the Ending Start Date of *12/31/2017*.



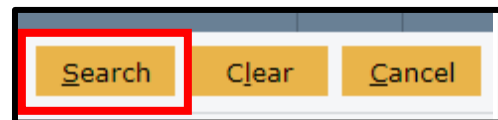
The screenshot shows the 'Price Increase Search' form. The 'Service' dropdown is set to 'PC-MONTHLY' and the 'Ending Start Date' is set to '12/31/2017'. Both fields are highlighted with red boxes. The 'Include' section has several checkboxes checked, and the 'Increase' section has 'Both' selected.

2. Enter *1.00* into the *Increase: by \$* field at the bottom.



The screenshot shows the 'Increase:' section of the form. The 'by \$' radio button is selected, and the value '1.00' is entered in the adjacent text box. This selection is highlighted with a red box. Other options include 'to \$', 'by %', and 'Increase Additional Line Items'.

3. Click the *Search* button at the top of the screen.



The screenshot shows three buttons: 'Search', 'Clear', and 'Cancel'. The 'Search' button is highlighted with a red box.

4. On the Search Results screen, click the *Add to Batch* button.

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Search Results (282 matches) **Add to Batch** Exit

Batch Number: (new)
 Increase Rules: Increase by \$1.00

282 matches (showing results 1 - 100): [Next 100 Results >>](#)

Acct	Company/Name	Service	Program	\$/Hour	Old Price	New Price
17	Purple flower/Purple	ANTS			150.00	151.00
22	Smith, David	ANTS			155.00	156.00
53	JANKE, BRUCE & SYLVI	ANTS			60.00	61.00

- These results have now been added to a Service Price Increase batch. You can print / email Price Increase Letters, edit the batch's current results, or release the batch to update your prices.

5. Click the *Release* link to release this batch.

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Service Price Increase **Report**

Batch #	Opened On	Owner	Branch	Count	[Add]	[Edit]	[Lock]	[Delete]	[Release]	[Make Public]	[Report]
1013	05/16/2010	ADMN	t'3'a	709	[Add]	[Edit]	[Lock]	[Delete]	[Release]	[Make Public]	[Report]
1016	07/26/2010	ADMN	t'3'a	158	[Add]	[Edit]	[Lock]	[Delete]	[Release]	[Make Public]	[Report]
1019	11/05/2010	ADMN	t'3'a	135	[Add]	[Edit]	[Lock]	[Delete]	[Release]	[Make Public]	[Report]

6. Click *OK* on the pop-up window to release the batch.

app.pestpac.com says

Release batch 1013?

OK Cancel

7. The *Last Price Increase* section will update, displaying information like Batch Number, Start and Completion Date, the user who released it, and the quantity of results.

Last Price Increase

Batch #: 1022
 Opened On: 2/23/2011 10:40:54 AM
 Started At: 9/26/2018 1:41:00 PM
 Completed At: 9/26/2018 1:41:09 PM
 Owner: ADMN
 Branch: t'3'a
 Count: 113

[View Report](#)

Printing or Emailing Price Increase Letters

To print or email price increase letters, complete the following steps:

1. On the *Service Price Increase* batch screen, click the *Report* button to navigate to the Price Increase Report.

Service Price Increase Report

Batch #	Opened On	Owner	Branch	Count	
1023	02/23/2011	ADMN	t'3'a	109	[Add] [Edit] [Lock] [Delete] [Release] [Make Public] [Report]

2. On the Report screen, do the following:

Price Increase Report
Display
Email
Print
Clear

Selection Criteria

Location Code:

Bill-To:

Starting Batch:

Ending Batch:

Starting Date:

Ending Date:

Branch:

Service:

Include Setup Types

Setups Renewals Programs

Include Records From

Current History

Format

Detail Letter

Letter:

Log Mailings

- Use the *Selection Criteria* to narrow down the results. Note the Batch number for the customers you are notifying with the Price Increase Letter.

- In the *Include Records From* section, select *Current* if the batch has not yet been released; select *History* if the batch has already been released.
- In the *Format* section, select *Letter*. Choose the Letter (from your Letters Lookup Table). Check *Log Mailings* to write this letter to the Location's Documents sections.
- Use the *Email* button to send the Price Increase Letter to the Bill-To email.
- Use the *Print* button to print physical Price Increase Letters.

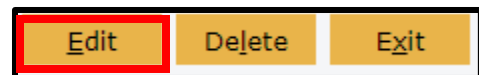
Turning off Price Increases for Specific Accounts

To turn off price increases for specific accounts, complete the following steps:

1. Go to the Location that you do not want to receive price increases and click the *Service Setup* that should never get a price increase.

Service	Schedule	Bill-To	Tech	Last Service	Next/Renewal	Cancel Date	Amount	
ANTS	M1MON	4013	LEAH		03/10/2016		120.00	Order

2. Click the *Edit* button.



3. Check the *Uncheck Increase Price Box* and click the *Save* button.

Schedule: M1MON	Active: <input checked="" type="checkbox"/>	PO#: <input type="text"/>
Locked: <input type="checkbox"/> Unscheduled: <input type="checkbox"/>	Charge: Service Order	PO Expiration: <input type="text"/>
Time: 06:00 PM	Start Date: <input type="text"/>	Division: 100
Time Range: <input type="text"/>	Route: <input type="text"/>	Source: <input type="text"/>
Duration: 00:40	Targets: ANTS ANT, CARPANTS	GL Code: DEFAULT
Sch. Color: <input type="text"/>	Measurement: <input type="text"/>	
Skip Months: <input type="checkbox"/> Jan <input type="checkbox"/> Feb <input type="checkbox"/> Mar <input type="checkbox"/> Apr <input type="checkbox"/> May <input type="checkbox"/> Jun <input type="checkbox"/> Jul <input type="checkbox"/> Aug <input type="checkbox"/> Sep <input type="checkbox"/> Oct <input type="checkbox"/> Nov <input type="checkbox"/> Dec		
Next Gen: 10/01/2018	Increase Date: <input type="text"/>	Cancel Date: <input type="text"/>
Last Gen: 09/03/2018	Increase Price: <input checked="" type="checkbox"/>	Cancel Reason: <input type="text"/>
Next Service: 03/10/2016	Expiration Date: <input type="text"/>	Comm. Start: <input type="text"/>

4. Repeat these steps for all Setups that should not be increased.

REMEMBER: For additional setup, training, and usage resources for FREE, including live webinars and a robust video library, please visit [PestPac University](#).

