

## Pricing *Setup.*

How a price sheet becomes rates the platform can read on every Trip, Proposal, PO and invoice. Part A is the five decisions a department head makes before anyone types a number. Part B is the build: the master sheet, the overrides, the Vendor assignments, the upload, the Service defaults, and the test that proves a line prices itself.

### APPLIES TO

Operations leads, finance, administrators

## What a rate is.

### WHAT A RATE IS

**A rate is a price the platform can find on its own.**

At check-out, on a Proposal line, on a Payable, it looks for the row matching the Trade, Service, Site, Client and Vendor. Setup makes sure it always finds the right one.

### FIVE SHAPES OF A PRICE. ONE TAB EACH UNDER RATES & ASSIGNEES.

#### Per Hour

T&M, hourly, labor

Regular, Overtime, Double or Holiday, per labor type. Travel, flat or by distance. Minimum billable hours. Hours come from check-in to check-out.

#### Per Service

flat per visit

One price for the visit, whatever the Tasks. A PM price and an On Demand price. Quantity can be changed on the line.

#### Per Task

per application, per unit

One price per Task the Service Provider ticks. Tasks not ticked do not bill. A PM price and an On Demand price per Task.

#### Per Event

per storm, by inches

Accumulation bands with a price each, plus an excess rule past the last band. Reads the certified total after the storm.

#### Equipment Task T&M

rarely needed

Hourly by equipment Task. Most accounts never load one. Ask before you do.

Every shape carries a Client side and a Vendor side, and an item and account for each so the line can sync to accounting.

**The five tabs under Products and Services › Services & Rates › Rates & Assignees.** Per Hour, Per Service, Per Task, Per Event. Equipment Task T&M exists; ask before you load one.

WHERE A RATE LIVES. THE MOST SPECIFIC ROW WINS, ON EACH SIDE SEPARATELY.

#### Client side (the price)

|                                                                     |      |
|---------------------------------------------------------------------|------|
| <b>Site Assignee</b><br>this Site, this Vendor doing the work       | wins |
| <b>Site Default</b><br>this Site, any Vendor                        |      |
| <b>Client Assignee, Client Default</b><br>every Site of this Client |      |
| <b>Zone Generic</b><br>a state, county or zip, any Client           |      |
| <b>Generic</b><br>the master sheet every new Client inherits        |      |

Read top down. The first row that exists for the line is the price.

#### Vendor side (the cost)

|                                                                              |      |
|------------------------------------------------------------------------------|------|
| <b>Vendor Assignee</b><br>this Vendor at this Site                           | wins |
| <b>Vendor Default</b><br>this Vendor anywhere                                |      |
| <b>Site Default, Client Default</b><br>the Site or Client row, Vendor column |      |
| <b>Zone Generic</b><br>a state, county or zip                                |      |
| <b>Generic</b><br>the master sheet, Vendor column                            |      |

The Vendor-specific row is checked first on a PO, a Vendor Proposal and a Payable.

**Where a row lives, and which one wins.** Client and Vendor are looked up separately. A Site can take its Client price from the Site row and its Vendor cost from the Vendor's row.

#### ZONE AGAINST CLIENT

A Zone row is a geography, not a Client. Site is read first, then Client, so a Client row beats a Zone row for that Client's Sites and the Zone row prices everyone else there. Confirm with the step 7 test before relying on it.

# Five decisions before anyone types a number.

Every price-sheet failure traces to a decision that was never made, so each person loading rates made their own. Make these five once, in writing, and the build in Part B is mechanical.

| FIVE DECISIONS BEFORE ANYONE TYPES A NUMBER.    |                                                                                                               |                                                                                                                                       |
|-------------------------------------------------|---------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------|
| <b>1</b> When is the price known?               | <b>Before dispatch</b><br>Cut a PO from the Vendor rate and the asset history. Nobody ticks boxes on a phone. | <b>In the field</b><br>Per Task or Per Hour. The Service Provider's check-out writes the line.                                        |
| <b>2</b> One master sheet, or one per Client?   | <b>Master</b><br>A Generic sheet every new Client inherits. The person adding a Client types nothing.         | <b>Custom</b><br>A Client Default row per Client, loaded from the contract exhibit.                                                   |
| <b>3</b> Where does the Vendor live?            | <b>Client level</b><br>One Vendor, one price, every Site. A Client Assignee row.                              | <b>Site level</b><br>A priority Vendor per Site. Site Assignee, priority 1. Snow and multi-Vendor Clients.                            |
| <b>4</b> Can Vendors see their rate?            | <b>Yes</b><br>A Vendor Assignee row shows on the Vendor Portal. Fine when it is the agreed price.             | <b>No</b><br>Keep Vendor rates at Zone or Generic. The Portal shows the row, not a target.                                            |
| <b>5</b> Fixed monthly Client, per-Trip Vendor? | <b>No</b><br>Both sides on the Trip. The ordinary case.                                                       | <b>Yes</b><br>A Scheduled Service bills the Client. The Trips carry Non Billable on the Client side and the Vendor rate on the other. |

**The decisions.** Left or right, per Client. Most accounts land on the left for decisions 2 and 4 and on the right for 1, 3 and 5.

## 1 The price is known before dispatch, or captured in the field.

**WHERE** Decision 1. A Purchase Order cut from the Vendor rate and asset history, or a Per Task or Per Hour line written by the check-out.

**EXCEPTION** One account asked Vendors to tick Tasks on the phone for pricing it already knew. The Vendors did not tick, and the lines came back at zero.

**CORRECTION** The decision is written on the contracts matrix, per Client, and the Service defaults in step 6 match it.

## 2 One master sheet, or a sheet per Client.

**WHERE** Decision 2. A Generic row set every new Client inherits, with Client Default rows only where a contract differs.

**EXCEPTION** Rates loaded only as Vendor assignee rows, no Generic and no Site Default. When that Vendor backed out, every Proposal for the Client came up blank.

**CORRECTION** Rates & Assignees, filtered to Rate Level Generic, shows a Generic row for every Service you sell.

### 3 Vendors are assigned at the Client or at the Site.

**WHERE** Decision 3. Client Assignee for one Vendor everywhere; Site Assignee with a priority for a Vendor per Site.

**EXCEPTION** Vendors assigned on the agreement only, so bulk creation produced Work Orders with no Vendor.

**CORRECTION** Every awarded Site shows a priority 1 assignee on the Service, and the Bulk Schedule grid shows a Vendor on every row.

### 4 Vendors can see their rate on the Portal, or not.

**WHERE** Decision 4. A Vendor Assignee row is visible to that Vendor on the Vendor Portal.

**EXCEPTION** A target cost was loaded as the Vendor row and the Vendor read it as the agreed price. One account moved every Vendor rate to the state level to hide it.

**CORRECTION** The Vendor rows that exist are the agreed prices. Targets live in a spreadsheet, not in a Vendor Assignee row.

### 5 Fixed-monthly Clients bill from an agreement, not from the Trip.

**WHERE** Decision 5. A Scheduled Service carries the fixed amount and generates the Receivable. The Trips carry Non Billable on the Client side and the Vendor rate on the other.

**EXCEPTION** A \$575 monthly Client rate was loaded on the Service and hit every completed Trip. The Client was billed per visit for a flat contract.

**CORRECTION** The Client's Trips generate a Payable and no Receivable. The agreement generates the Receivable on its schedule.

**RESULT** Five answers, per Client, on the contracts matrix. Part B is built from that sheet and nothing else.

## PART B · FOR THE PERSON LOADING RATES

# The build, in seven steps.

Classify, build the master, layer the exceptions, assign the Vendors, upload, set the Service defaults, test. Each step ends with the proof that it is done.

## Step 1. Classify every line on the price sheet.

Before a number is typed, every line on the contract exhibit gets one of the five shapes, or a note that it is not a rate at all. This is the translation step, and it is where the worst failures started.

| THE PRICE SHEET SAYS                          | LOAD IT AS         | WHAT THAT MEANS                                                                          |
|-----------------------------------------------|--------------------|------------------------------------------------------------------------------------------|
| "Per trip", "per visit", "flat rate per call" | <b>Per Service</b> | One PM price and one On Demand price. Quantity on the line if the contract counts units. |

"Per application", "per unit", "per filter", a line per Task

**Per Task**

A price per Task the Service Provider ticks. Nothing ticked, nothing billed.

"Time and materials", "hourly", Reg / OT / DT, "two hour minimum"

**Per Hour**

Labor types with three rates each, travel, and Minimum Billable Hours.

"Snow range dependent", inch bands

**Per Event**

Accumulation bands and an excess rule. The certified total picks the band.

"Truck charge", "base rate", "first hour"

**Per Hour plus a material line**

The flat part is a material item; the hours are the labor rate.

"Not to exceed", "cap"

**Not a rate**

An NTE is a ceiling on the Trip, typed at dispatch. It sits over any of the five shapes.

"Fixed monthly", "seasonal", "retainer"

**Not a rate**

A Scheduled Service agreement bills it. The Trips carry Non Billable on the Client side.

### ONE SERVICE, NOT ONE PER PRICE

Two prices for the same work is two rate rows, not two Services. A Service per price variation ends in twenty thousand rows and an unusable dropdown. Name the row for the Client or the state: "Alarm - CA" reads; "Alarm" three times does not.

## Step 2. Build the master sheet: Generic rows, both sides.

The master is the Generic row set every new Client inherits: one row per Service per shape, Client price and Vendor cost together, each with its item and account. Dialog for a handful of Services; upload for more.

- 1 Service Name, the Task (blank means every Task on the Service), Rate Type Non Union or Union.
- 2 "This is a Generic Rate". The master row. Zone Specific and "specific to a company, client, vendor, site or assignee" are steps 3 and 4.
- 3 Preventive Maintenance Rate and On Demand Rate. Two prices for the same Service, one for scheduled work and one for reactive. Fill both, or the one you skip bills at zero.
- 4 Client Per Service and Vendor Per Service, each with Item Name, Income or Expense Account, Tax Code and Item Code.

**New Service Rate, generic.** Rates & Assignees > Per Service > + Rates. The same dialog shape on every tab; the price fields change.

Services

Rates & Assignees

1

Per Hour

Per Service

Per Task

Equipment Task T&M

Per Event

6

Rates

3 / 3

|                          | Client              |                                    |                                  |              |        |        |      |          |            |                  |        |      |                                | Vendor       |               |             |                          |                           |                         |              |               |             |                          |                           |                         |    |       |     |    |    |    |    |    |        |  |
|--------------------------|---------------------|------------------------------------|----------------------------------|--------------|--------|--------|------|----------|------------|------------------|--------|------|--------------------------------|--------------|---------------|-------------|--------------------------|---------------------------|-------------------------|--------------|---------------|-------------|--------------------------|---------------------------|-------------------------|----|-------|-----|----|----|----|----|----|--------|--|
| <input type="checkbox"/> | Trade               | Service                            | Labor Type                       | Union Status | Client | Vendor | Site | Assignee | Rate Level | Serviceable Area | 2      | 3    | 4                              | 5            | 6             | 7           | 8                        | 9                         | 10                      | 11           | 12            | 13          | 14                       | 15                        | 16                      | 17 | 18    | 19  | 20 | 21 | 22 | 23 | 24 | Action |  |
|                          |                     |                                    |                                  |              |        |        |      |          |            |                  | Region | Zone | Minimum Billable Hours (HH:MM) | Regular Rate | Overtime Rate | Double Rate | Travel Regular (Overage) | Travel Overtime (Overage) | Travel Double (Overage) | Regular Rate | Overtime Rate | Double Rate | Travel Regular (Overage) | Travel Overtime (Overage) | Travel Double (Overage) |    |       |     |    |    |    |    |    |        |  |
| <input type="checkbox"/> | Relocation Services | change-order services              | Standard T&M Rates               | NonUnion     | --     | --     | --   | --       | Generic    | --               | --     | --   | 0:0                            | \$275.000    | \$325.000     | \$425.000   | Not Set                  | Not Set                   | Not Set                 | \$125.000    | \$0.000       | \$450.000   | Not Set                  | Not Set                   | Not Set                 |    | 08:03 | EDT |    |    |    |    |    |        |  |
| <input type="checkbox"/> | Relocation Services | Final-Mile Delivery & Installation | Final Mile                       | NonUnion     | --     | --     | --   | --       | Generic    | --               | --     | --   | 0:0                            | \$0.000      | \$0.000       | \$0.000     | Not Set                  | Not Set                   | Not Set                 | \$0.000      | \$0.000       | \$0.000     | Not Set                  | Not Set                   | Not Set                 |    | 11:08 | EDT |    |    |    |    |    |        |  |
| <input type="checkbox"/> | Relocation Services | Receiving & Warehousing            | Relocation Receiving & Warehouse | NonUnion     | --     | --     | --   | --       | Generic    | --               | --     | --   | 0:0                            | \$0.000      | \$0.000       | \$0.000     | Not Set                  | Not Set                   | Not Set                 | \$0.000      | \$0.000       | \$0.000     | Not Set                  | Not Set                   | Not Set                 |    | 11:04 | EDT |    |    |    |    |    |        |  |

- 1 The five tabs. Each tab is its own table and its own upload template.
- 2 Rate Level. Generic here. The column to read when a line prices wrong.
- 3 Client Minimum Billable Hours (HH:MM), then Regular, Overtime, Double rates.
- 4 Travel Regular, Overtime, Double, each with an overage: flat, or by distance past a threshold.
- 5 The Vendor side: the same six columns, the cost.
- 6 + Rates opens the dialog for this tab.

**The Per Hour tab.** One row per Labor Type, with three Client rates, three Vendor rates, travel, and Minimum Billable Hours.

**RESULT** Rates & Assignees filtered to Rate Level Generic shows a row for every Service you sell, on both sides, with an item and an account on each.

### Step 3. Layer the exceptions: Zone, then Client, then Site.

Only where a contract differs from the master: a Zone row for a different labor market, a Client Default row for a Client with its own exhibit, a Site Default row for one Site with its own deal.

| RATE TYPE              | WHERE THE ROW APPLIES                                     | COLUMNS THAT MAKE IT THAT TYPE                                                                  |
|------------------------|-----------------------------------------------------------|-------------------------------------------------------------------------------------------------|
| <b>Generic</b>         | Every Client, every Site, every Vendor. The master sheet. | Trade, Service, Union. No Client, Site or Vendor columns.                                       |
| <b>Zone Generic</b>    | A geography: State, County or Zip Code lists.             | The zone columns filled; no Client or Site. Not on the Per Event template.                      |
| <b>Client Default</b>  | Every Site of one Client.                                 | Client Name or a Client ID.                                                                     |
| <b>Client Assignee</b> | One Vendor, every Site of one Client.                     | Client, Vendor Name, Assignee Priority.                                                         |
| <b>Site Default</b>    | One Site, any Vendor.                                     | Site Name or a Site ID.                                                                         |
| <b>Site Assignee</b>   | One Vendor at one Site, with a priority.                  | Site, Vendor Name, Assignee Priority 1 to 10. Loading one creates the Site Default row for you. |
| <b>Vendor Default</b>  | One Vendor, anywhere.                                     | Vendor Name or a Vendor ID.                                                                     |

|                 |                                      |                                  |
|-----------------|--------------------------------------|----------------------------------|
| <b>Vendor</b>   | One Vendor at one Site, Vendor side. | Site, Vendor, Assignee Priority. |
| <b>Assignee</b> |                                      |                                  |

#### SCREEN

New Service Rate with “This Rate applies to a specific company, client, vendor, site or assignee” selected.

### Step 4. Assign the Vendors, with a priority.

A Site Assignee row makes a Vendor the Site’s Vendor for that Service: dispatch offers them first and bulk creation pulls them without a search. Loading the row also creates the Site Default row, so the Site has a price the moment it has a Vendor.

- 1 Assignee Type: Vendor, or a team member for self-performed Sites.
- 2 Assignee. The Vendor must already be active and compliant. Check Network > Vendors Compliance first.
- 3 Priority. 1 is first. Ten slots.

+ **Assignee Rates on a Site’s Service row.** Site > View Service Rates > the Service > + Assignee Rates.

#### DO THIS BEFORE PER SERVICE RATES

Per Service rates do not populate on a Site until a Vendor is assigned to it with a priority. Assign first, price second. And do it on the Site, not on a Scheduled Service agreement, which bulk creation does not read.

**RESULT** Every awarded Site has a priority 1 assignee on every Service it buys. The Bulk Schedule grid shows a Vendor on every row.

### Step 5. Upload, and watch it land.

Past a few dozen rows, it is a spreadsheet. Each tab’s download panel has two files: the rows already loaded, and a blank template. Download fresh every time; the columns change. One file, one tab. Blank Core Rate ID creates; filled updates.

### Per Service Rate Download

To update multiple Per Service rates at once just download the spreadsheet from this page. Based on the filtered results the downloadable file will contain the Per Service rates for the client, the vendor or the site that can be adjusted and reuploaded.

1

Download 191 Rates

OR

2

Download Sample Excel Template

### Per Service Rate Upload

Once you're done filling it out you can upload it and it will create the necessary Per Service rates.

3

X

Drag an excel file here or browse for an excel to upload

- 1

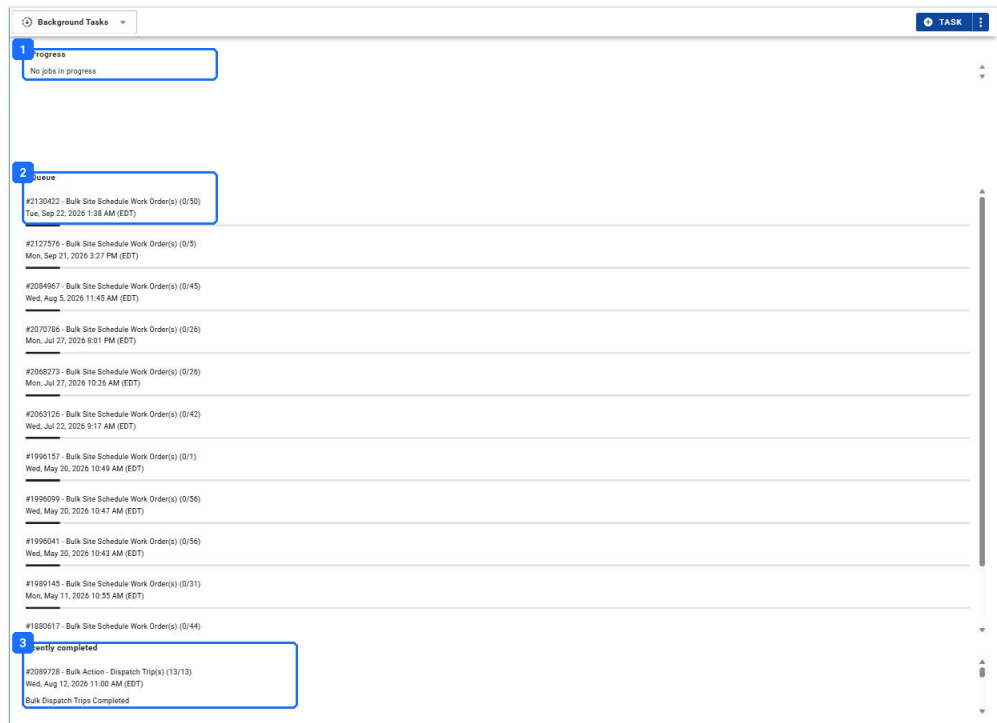
Download N Rates. Everything loaded that matches the current filter, in upload layout. This is also the rollback: the upload template is the download template.
- 2

Download Sample Excel Template. Blank, with every column the upload reads.
- 3

Drag or browse to upload. The platform creates or updates the rows as a background job.

**The download and upload panel.** The download icon beside + Rates opens it on every tab.

| COLUMN                                                                                            | WHAT TO PUT IN IT                                                                                                                   |
|---------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------|
| <b>Core Rate ID (keep blank to create new)</b>                                                    | Blank on a fresh load. Filled on a re-upload of the downloaded file, which updates the row in place. Not on the Per Event template. |
| <b>Rate Type</b>                                                                                  | One of the eight above. This column decides which of the identity columns the upload reads.                                         |
| <b>Client Name, Core Client ID, Custom Client ID; the same for Site and Vendor</b>                | Name the party the row belongs to. A name that does not match the record exactly fails the row; the IDs never fail.                 |
| <b>Team Members (email, comma separated), Assignee Region Team Member, Assignee Priority</b>      | For self-performed work. Priority 1 is first.                                                                                       |
| <b>Trade (Mandatory), Service (Mandatory), Union (Yes/No) (Mandatory)</b>                         | Every row. The upload is one file per tab; the Trade and Service inside it can vary.                                                |
| <b>State, County, Zip Code (comma separated)</b>                                                  | Zone rows only.                                                                                                                     |
| <b>The price columns, Client then Vendor</b>                                                      | Different per tab: Regular / Overtime / Double per labor type; PM and On Demand; per Task; per band.                                |
| <b>Item Type Name, Item Name, Income Account, Tax Code, Item Code, Expense Account, per price</b> | What the line becomes in accounting. Finance fills these. A blank account is a sync failure later.                                  |
| <b>Remove Assignee (Yes/No), Remove Rate (Yes/No)</b>                                             | Yes deletes on upload. Leave blank.                                                                                                 |



- 1 In Progress: the running job.
- 2 In Queue: jobs waiting. A job at 0 of N for more than an hour is not going to start on its own. Contact support with the job number; do not re-upload.

- 3 Recently completed: your job at N of N, and the error file if any rows failed. Fix the rows it names and upload only those.

**Background Tasks.** The clock icon at the foot of the left navigation. The upload is done when it reads N of N here, not when the browser says so.

**RESULT** Background Tasks shows the upload at N of N. The tab, filtered to the Client, shows every row the file carried, on both sides.

## Step 6. Set the Service defaults.

Rates say how much. The Service defaults say how the line is generated. Each side of every Service carries three defaults: the billing method every Trip inherits, the verification rule that gates the Payable, and when the Client is invoiced.

assigned then it will clear the defaults. If these are blank, please go to your company settings and add default income/expense accounts.

Default Call Type: P2

Default Problem Type: Select Problem Type

Default Priority: P-2 48 Hours

Department/Branch: Select Department/Branch

Generate Client Invoice: Any Open Work Order Billable Item

Generate Work Order Trip Report And Attach To Work Order: Select Report Template

Automatically Send Work Order Report To Client Upon Generation: ☐ Send via Email ☐ Send to CMMS

**Trip Level Default**

These defaults will only apply when you have one service selected at the trip level. If more than one service is assigned then it will clear the defaults. If there is client, site, vendor billing methods applied, the trip will take those default billing methods as priority.

Default Client Billing Method: Per Event

Verification Required For Client Billing: ☒ When selected, Trips will require Check-In/Out and Verification to invoice Client.

Default Vendor Billing Method: Per Event

Verification Required For Vendor Billing: ☒ When selected, Trips will require Check-In/Out and Verification to invoice Vendor.

- 1 Generate Client Invoice: On Work Order Completion, or Any Open Work Order Billable Item. Completion is right for one-visit reactive work. Per billable item is right for anything with several Trips, and for snow. Set wrong, a monthly Client rate hits every Trip.
- 2 Default Client Billing Method for Trips on this Service, and the Vendor side below it. One of the eight. Non Billable on the Client side is how a fixed-monthly Client's Trips stay off the Receivable.
- 3 Verification Required for Client Billing and for Vendor Billing. On. Without them an unverified Trip can generate.

**The Service dialog, Work Order Level Default and Trip Level Default.** Products and Services > Services & Rates > the Service > edit.

**RESULT** Every Service's two defaults match the contracts matrix, and Verification Required is on for both sides.

## Step 7. Test it on a line.

### THE TEST

## A rate is proven when a line prices itself.

Add a line to a Receivable, Proposal or PO on a Site of each Client type. The price you expect should be on top; if not, the Rate Level column shows which row won.

Task: Shovel Municipal Sidewalks

People on Site: 1 Qty: 1.000 Rate: \$ 250.000 Tax: 6.350 % Trip # 1 Subtotal: \$250.00

Description: Trip: 1, 01:28 PM EDT 09/01/2026, Snow Removal, Shovel Municipal Sidewalks

Aa

- 1 Type: Task, Service, Labor, Material. Which tab the platform is reading.
- 2 Name: the rate row it found. Best fit first; a state or Client label in the name tells you which.
- 3 Qty. On a Per Service line, the count of units when the contract counts them.
- 4 Rate. Filled from the row. Typed over, it is a one-off and nobody will know why. Markup amount and Work Order NTE sit at the foot of the invoice; the NTE check counts the markup.

**A line on a Receivable.** Type, Name, Qty, Rate. The rate came from the Site's Per Task row without anyone typing it.

**RESULT** A test line on a Generic Site, a Zone Site, a Client Site and a Site with its own row each returns the expected price on top without editing. A test Payable has no \$0 line.

## Where this usually goes wrong.

Ranked by cost on last year's calls. The first one is the one to check on every account.

| # | WHAT YOU SEE                                                  | WHAT HAPPENED                                                                                                                                    | THE FIX                                                                                                                     |
|---|---------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------|
| 1 | <b>Proposals and lines come up blank for a whole Client.</b>  | Every rate was a Vendor Assignee row for one Vendor and there was no Generic or Site Default behind it. The Vendor left; the price left with it. | Export the tab, sort by Assignee, copy the prices onto Site Default or Generic rows, re-upload. Decision 2.                 |
| 2 | <b>A Site in one state only offers another state's rates.</b> | The Zone lookup read the Client's headquarters state, not the Site's.                                                                            | A Site Default row for the affected Sites until the lookup is confirmed fixed. Report it.                                   |
| 3 | <b>A fixed-monthly Client is billed per visit.</b>            | The monthly amount was loaded as a Service rate and Generate Client Invoice was On Work Order Completion.                                        | A Scheduled Service for the Client, Non Billable on the Client side of the Trips, and the Vendor paid per Trip. Decision 5. |
| 4 | <b>The rate dropdown is unusable.</b>                         | Rows with no descriptive name, a labor item per rate type, a renamed Trade leaving its old name behind.                                          | Reset to zero and reload from one clean sheet. Name rows for the Client or the state.                                       |
| 5 | <b>A line at \$0 on the Payable.</b>                          | Only the PM price was filled and the work was On Demand, the Vendor column was empty, or the Vendor ticked a Task with no rate.                  | Fill both prices on every row. Load both sides. Site Specific Tasks so the phone only offers rated Tasks.                   |
| 6 | <b>The NTE did not stop a Trip that went over.</b>            | Markup was added after the check, or the NTE was never typed at dispatch. The NTE does not fill itself.                                          | Type the Vendor NTE on every Trip at dispatch and put the instruction in the Trip description.                              |
| 7 | <b>Labor rates missing on a Proposal.</b>                     | The Proposal was built on a Site with no Per Hour row at any level.                                                                              | A Generic Per Hour row for the Service. Step 2.                                                                             |
| 8 | <b>The upload "worked" and nothing changed.</b>               | The job sat in Background Tasks at 0 of N, or the error file was never opened.                                                                   | N of N, then the error file, then the rows it names.                                                                        |

## What good looks like.

| CHECKPOINT                         | EVIDENCE                                                    |
|------------------------------------|-------------------------------------------------------------|
| <b>Five decisions written down</b> | The contracts matrix carries an answer to each, per Client. |

| CHECKPOINT                               | EVIDENCE                                                                                            |
|------------------------------------------|-----------------------------------------------------------------------------------------------------|
| <b>A master exists</b>                   | Rate Level Generic shows a row for every Service sold, both sides, item and account on each.        |
| <b>Every awarded Site has its Vendor</b> | A priority 1 Site Assignee on each Service; the Bulk Schedule grid shows no blank Assignee.         |
| <b>The upload landed</b>                 | Background Tasks shows N of N and an empty error file.                                              |
| <b>Defaults match the matrix</b>         | Every Service's Client and Vendor default and its invoice trigger read what the contract says.      |
| <b>A line prices itself</b>              | A test line on each Site type returns the expected rate on top, and a test Payable has no \$0 line. |

#### QUESTIONS?

**Contact your Customer Success team.**

Or email [support@utilizecore.com](mailto:support@utilizecore.com) and a member of the team will get back to you.

**UtilizeCore**