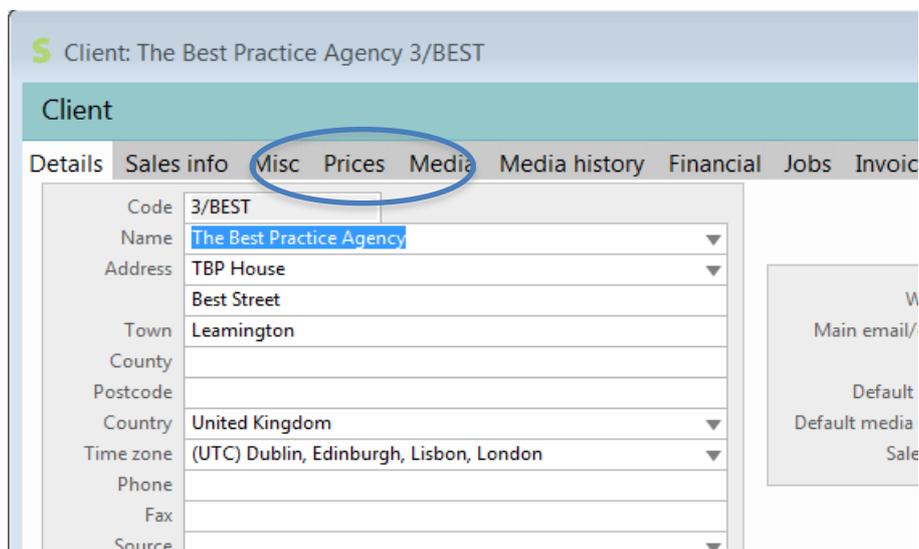# Synergist Spotlight on…

Client Specific Rates

All time, estimated or actual, recorded within Synergist is based on your Organisations 'standard rate card'. However, there may be the occasion whereby preferential rates have been agreed for a particular Client. Rather than remembering to update this on every job, or creating multiple charge codes for different clients, then why not try creating a Client Rate Card and let Synergist do the maths.

Standard charge rates are created within the file maintenance menu. The File Maintenance menu can be accessed via the Tools and Settings menu. If you cannot see Tools & Settings in your menu bar then access has been restricted to this area. See your Super User to discuss revising access

To allow users to create Client Prices user permisssions need to be set to allow the user to "**edit a Client".** This is set within the user records via the Edit User Permissions button.

Client Rate Cards are located within the client record, on the "**prices"** tab.

There are two methods that can be used in order to create Client rates:

1 – Update a selection of codes manually

2 – Update all or a selection of codes via an export/Import process

Method 1 – Update a selection of codes manually

This process is more suited to updating a small selection of rates.

1. Go to the **Clients and Jobs** menu in Synergist, choose the **client** menu, and then select the required client record from the list.

2. Within the Client Record, select the **Prices** Tab.
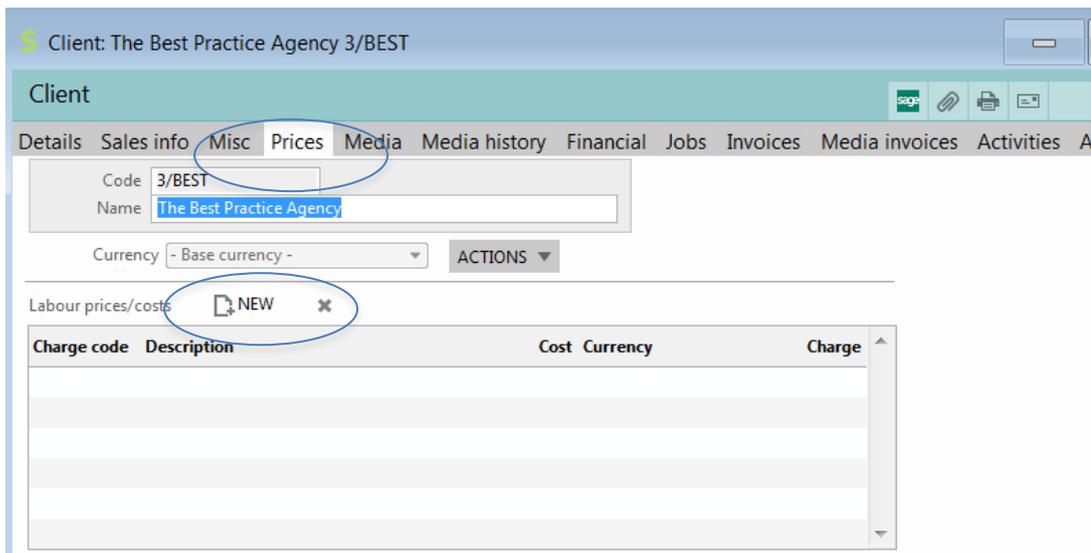
Click on the [NEW] symbol and select the option **add 'multiple Charge code Prices'.**

| Charge codes	Description	Std. rate	Charge rate			Std cost	Cost
3/AMENDS	Amends and copy changes	700.00	700.00			100.00	100.00
3/AWK	Artwork	100.00	100.00			50.00	50.00
3/CREDEV	Creative Development	125.00	125.00			75.00	75.00
3/CREDIR	Creative Director	300.00	300.00			150.00	150.00
3/CS	Client Services	100.00	100.00			50.00	50.00
3/DESIGN	Design	250.00	250.00			125.00	125.00
3/DIGDES	Digital Design	150.00	150.00			100.00	100.00
3/DIGDEV	Digital Development	150.00	150.00			100.00	100.00
3/JNCRE	Junior creative	100.00	100.00			75.00	75.00
3/PRJMAN	Project Management	175.00	175.00			125.00	125.00

3. Highlight a charge code (or a selection of charge codes)
   - Apply a percentage discount/uplift to a group of charge codes by entering the % in the discount by box as shown above
   - Multi select charge codes that are the same rate to apply the revised new rate to all the selected codes.
   - Enter new charge rate into the bottom left hand corner as displayed above.

4. Click **Apply.**

5. Repeat process for each charge code and click **done.**

Method 2 - Update all or a selection of codes via an export/Import process

1. Go to the **Clients and Jobs** menu in Synergist, choose the **client** menu, and then select the required client record from the list.

2. Within the Client Record, select the **Prices** Tab.
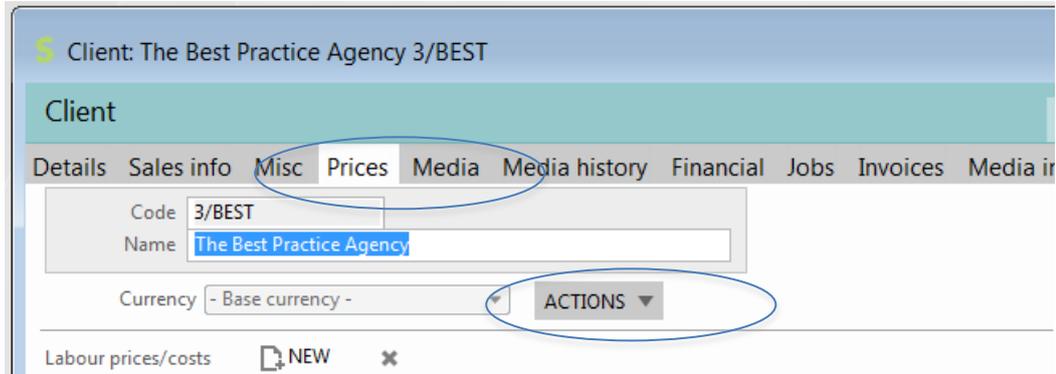
3. Click **'Actions'** button and select the **export** option, this will create a csv file for you to enter the revised charge rates, save the csv file (see visual below).
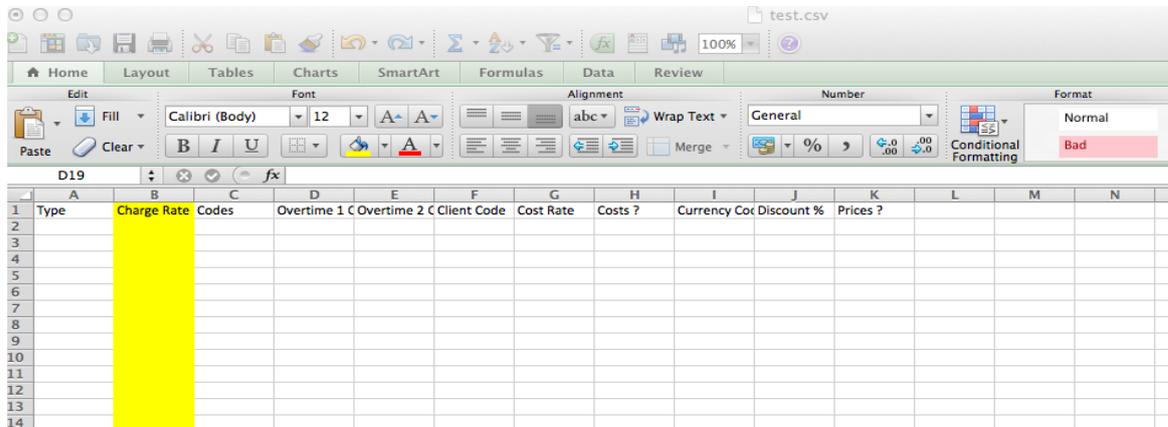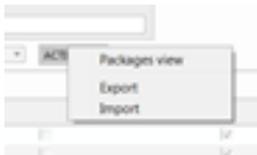

4. Create the new charge rates in column B. Save the csv file.

5. Go back to the Client record and the Prices tab, click on the **'actions'** button then select **'Import'**.
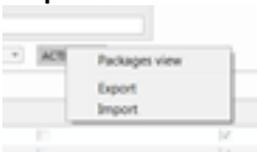
6. You will be prompted to choose **Append** or **Replace**. Click **'Replace'** to import rates and replace any existing rates. Click '**Yes'** to agree.

Append or Replace?

Append   Replace
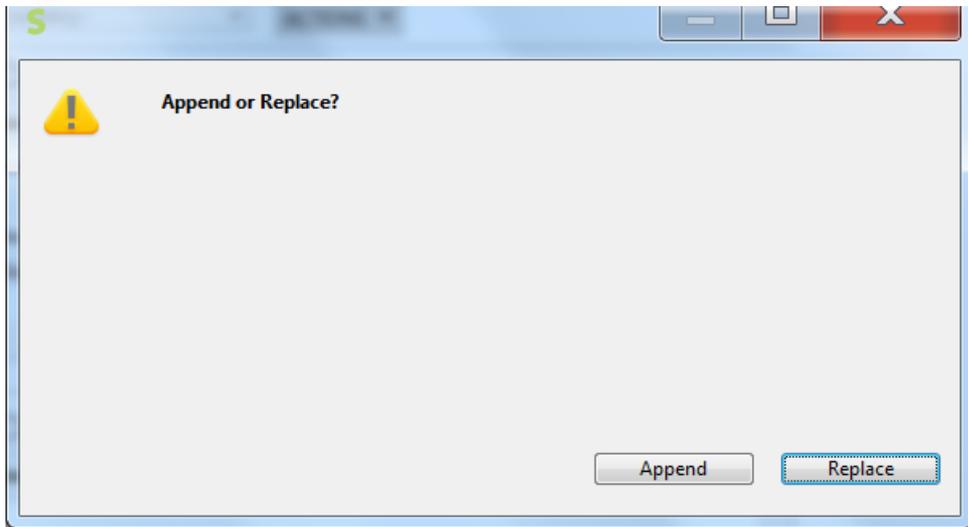
7. A dialogue box will appear to confirm that you are about to delete the existing client prices? Click "yes".

This will delete all client prices for The Best Practice Agency, continue?

No   Yes
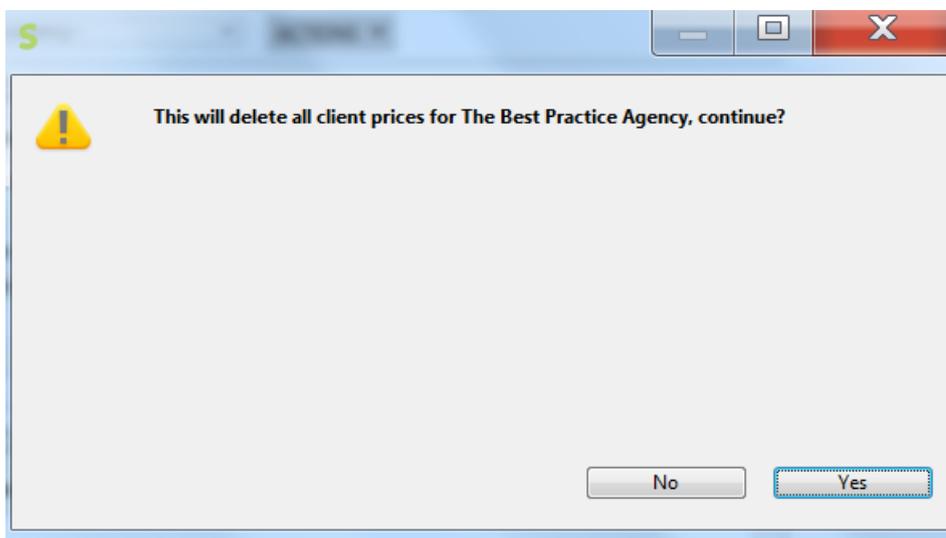
8. You will then need to locate the saved csv file with the new prices; once selected, the list of revised rates to be imported will be shown. Click **'Proceed with Import'.**

9. The new client charge rates will now be updated.

New rates will automatically apply to **new timesheets** and **new estimates** only. Existing estimates will remain at the previous rate.

Please contact The Agency Works at clientservices@taw.co.uk

Or call us on 01455 553246

If you wish to further discuss Client Rates within Synergist