

Rate Change Processing

This document describes the processing necessary to accomplish changing rates in SMS. Portions of the processing are automated but it is not totally set-it-and-forget-it. Careful data entry allows customers to pay at new rates while still being mailed prior subscriptions at old rates.

1. Enter new rate records.
2. Enter new class records.
3. Edit the old class records' Rate change information to show the correct New class and Effective date.
4. Change the rate data on the renewal forms prior to the first renewal printing that needs to reflect the new rate. SMS System Setup has renewal rate fields for 1, 2, and 3-year rates. Update those fields to change the rate data on standard SMS renewal forms.
5. Group invoices will automatically use the new rate.
 - a. Only prepaid Groups will use the new rate.
 - b. The prepaid beginning date must be greater than or equal to the new rate effective date.
 - c. The old class/rate will be used for entries prior to the prepaid beginning date. The new class/rate will be used for entries after the prepaid beginning date.
6. The Receipt screen asks for a class that corresponds to the receipt. Always enter the class that applies to the payment being entered. The Group's class and the class of the individual subscriptions it pays for can optionally be changed when the payment is processed. For Individuals, create a new Subscription record when the payment is processed so that any existing subscriptions will continue at the old rate.
7. Run the Change Rates utility prior to each new mail processing for issues dated on or after the rate change effective date. Enter the Cycles that relate to the date of the issue to be processed according to your billing Cycle system. This utility will update classes to the new rates' classes according to the entered data. Continue running the Change Rates utility before each mail processing until all Groups have been changed to the new classes. This may take at least one year.

Note: Mail processing always uses the Class on the Subscription record to calculate the rate.