



Synergist Spotlight on...

Client Specific Rates

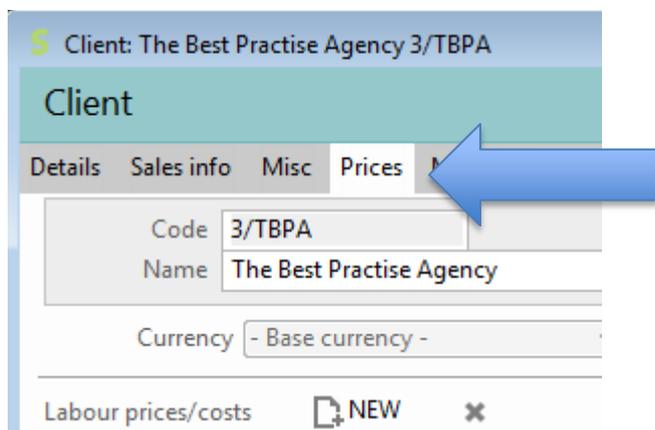
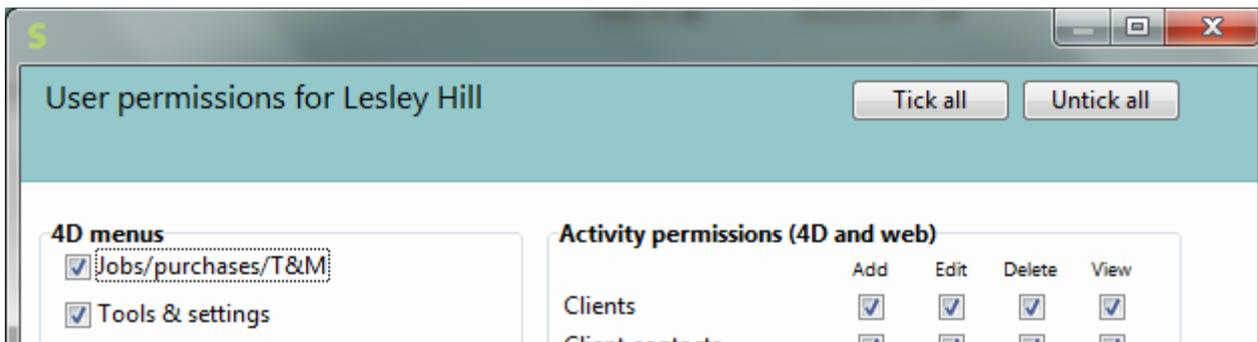
All time, estimated or actual, recorded within Synergist is based on your Organisations 'standard rate card'. However, there may be the occasion whereby preferential rates have been agreed for a particular Client. Rather than remembering to update this on every job, or creating multiple charge codes 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 permissions need to be set to allow the user to **"edit a Client"**.

[Edit user permissions...](#)

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

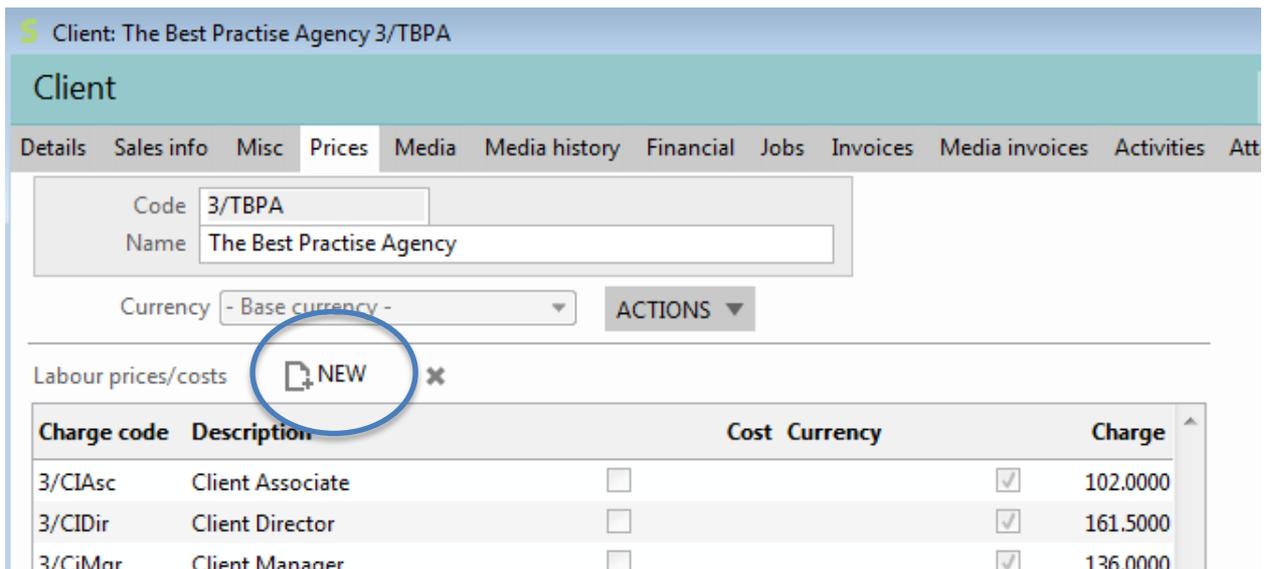
Update a selection of codes manually

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

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



2. Within the Client Record, go to the **Prices** Tab.



1. Click on the NEW icon and select the option 'add multiple Charge code Prices'.



Client: The Best Practise Agency 3/TBPA

Client prices - labour

Client The Best Practise Agency
Currency - Base currency -

Charge codes	Description	Std. rate	Charge rate		Std cost	Cost
3/3D Des	3D Designer (Higher Rate)	200.0000	200.0000		150.00	150.00
3/3DDESHR	3 D Designer (hourly rate)	1125.0000	1125.0000		562.00	562.00
3/3DGr	3D Designer (Std Rate)	160.0000	160.0000		80.00	80.00
3/ADSD	Art Direction/Senior Designer	125.0000	125.0000		95.00	95.00
3/AM	Account Management	100.0000	100.0000		75.00	75.00
3/AMENDS	Amends	75.0000	75.0000		50.00	50.00
3/ART	Artwork	80.0000	80.0000		60.00	60.00
3/BndStg	Brand Strategist	200.0000	200.0000		100.00	100.00
3/CADDES	Cad Designer	120.0000	120.0000		75.00	75.00
3/CIAsc	Client Associate	120.0000	102.0000		60.00	60.00
3/CIDir	Client Director	190.0000	161.5000		95.00	95.00
3/CiMgr	Client Manager	160.0000	136.0000		80.00	80.00
3/CON	Concept Development	100.0000	85.0000		80.00	80.00
3/COPY	Copywriting	105.0000	89.2500		85.00	85.00
3/CRDire	Creative Director	240.0000	240.0000		120.00	120.00

Charge
Discount by %
Charge rate

Cost
Uplift by %
Cost rate

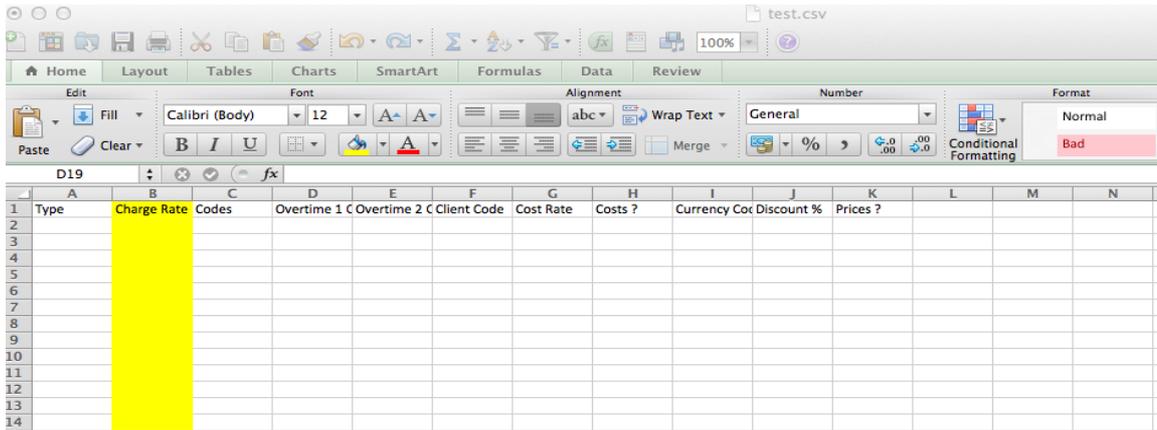
Done

2. Highlight a single charge code or choose a selection of charge codes to which wish to apply the same % discount
 - Apply a percentage discount/uplift to a group of charge codes by entering the % in the discount by box as shown above
 - Or, enter a new charge rate amount in the Charge Rate Box to apply a new revised rate to all the selected codes
3. Click **Apply**.
4. Repeat process for each charge code and click **done**.

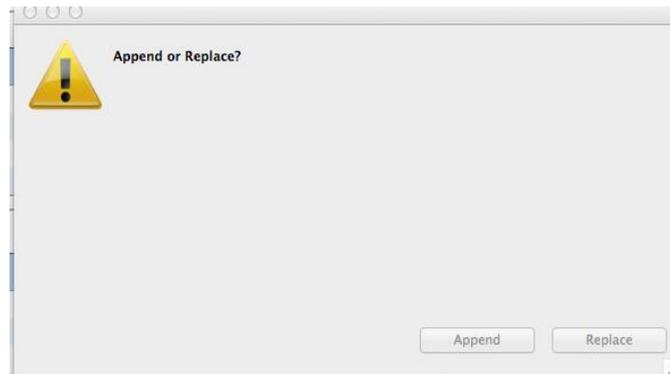
Method 2

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, 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).



3. Create the new charge rates in column B. Save the csv file.
4. Go back to the Client record and the Prices tab, click on the **'actions'** button then select **'Import'**.
5. You will be prompted to choose **Append** or **Replace**. Click **'Replace'** to import rates and replace any existing rates. Click **'Yes'** to agree.



6. A box will appear to detail the list of revised rates it is importing. Click **'Proceed with Import'**.



Client: The Best Practise Agency 3/TBPA

Import client prices

The following codes will be imported

Charge codes

3/CIAsc Client Associate
3/CIDir Client Director
3/CiMgr Client Manager
3/CON Concept Development
3/COPY Copywriting
3/ENGDES Engineering Designer
3/FREE Freelancer
3/CAR Case Review

Print **Proceed with Import** Cancel

Currency

New rates have now been imported.

NOTE

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 on 01455 553246

If you wish to further discuss Client Rates within Synergist