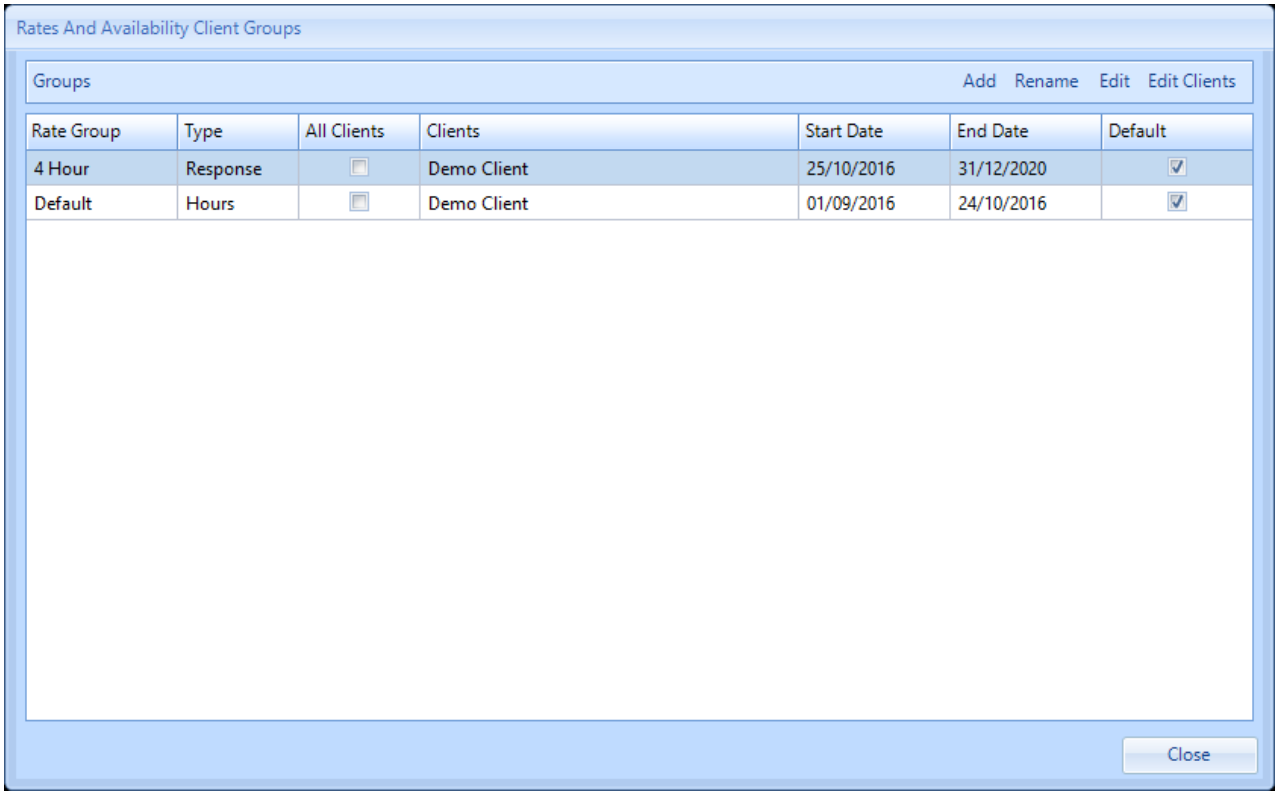
Adding Rate Groups

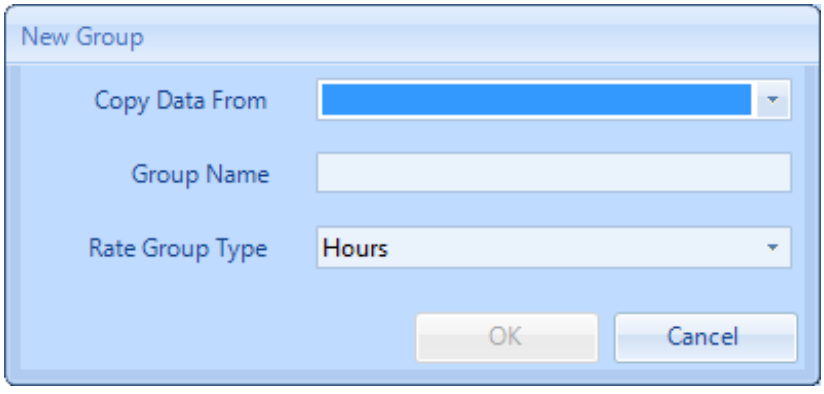
Wed, Jan 17, 2024 Resource Sub Menus

To apply Rates and Availability, Client Rates Groups are required. To Add a new Client Rates Group to a Resource, perform the following:

1. Select a Resource from the Resource List and click the "Rates and Availability" button in the Ribbon Menu. This displays the Rates and Availability Client Groups screen. Here, it is possible to add, edit and rename Client Rates Groups that have been created for the selected Resource. To create a new Client Rates Group, click the "Add" button.



2. The New Group screen will have two fields: Copy Data From and Group Name. The Copy Data From field is a drop down that displays the Client Rates Groups that have already been created for the Resource and by selecting one from the drop down, the new group will copy the data from the selected group once it's created. Leave this blank to not copy any data from any group. The Group Name field is just where the name of the new group is entered. Click "OK" once the name has been entered to create the group.



3. The new group will be displayed in the Client Groups list. From here, by selecting the Group, Clients can be added to the group by clicking the Edit Clients button. A selection of

Clients can be made using the pop up box or all the Clients can be selected using the "Select All" option. Click the "OK" button to update the group with the newly selected Clients. Groups here can also be renamed using the "Rename" button and edited using the "Edit" button or by double-clicking the group. Click "Close" once all the necessary tasks have been done.

4. There must be a Client Group ticked as the Default for any one date range - otherwise, the system will not know which rate group to select. The Default tick box can only be ticked once a date range is present against the Client Group.