

Creating a Flat-Rate List

As described in the SD-Mobile Handbook, there are strong reasons for setting up a flat-rate system — designed, specifically, to automatically integrate as you or your techs are creating mobile tickets.

There are two broadly-different paths you may take, in this regard.

One of these options (at least assuming your trade is in appliance repair, as opposed to some other industry) is to integrate with the [BlueBook](#). This is a very sophisticated flat-rate system that, for many years, has been an appliance-industry standard. There is a significant subscription cost, but the system will likely persuade you to charge so much more for your work that you will earn back the BlueBook's subscription cost, and a great deal more. It also gives you "cover" for charging more, because it allows your techs to explain and show that pricing comes from a nationally-recognized guide.

If use of the BlueBook is your preference, use the above-provided hyperlink to connect with the good folks at Service Company Solutions. They'll guide you in setup, options, and so on.

The other option is to use your own, internally-managed flat-rate system. The remainder of this manual is designed to guide you in that direction, if it is indeed your preference.

Assuming yes (i.e., you *do* wish to create and manage your own flat-rate system), the first thing to understand is that any such system must be based on a flat-rate list (which is, essentially, a listing/catalog of labor-item descriptions, with a specified price for each). There are many methods by which such a list may be created. We'll here suggest a few possibilities, but please nevertheless understand you may use any method you wish, so long as you end up with a structure that fits a quite simple mold. Details of that mold are as follows:

Your list should be a simple text document that contains four columns, each separated by a tab. The first column is for each line-item's "Code," a short alpha-numeric reference to the item involved (up to five digits). The second column is for a verbal description (up to 65 characters) of the actual work item. The third column is for price as applicable if it's the first labor item on the ticket (in other words, this price includes an implicit base fee to cover trip charge and diagnosis). The fourth column is for price if it's other than the first labor item (in other words, prices in this column do not include that implicit base fee).

Your list must also be given the name and placed in the location where SD-MobileLink knows to look for it. Specifically, the file must be named *'RateSheet.txt,'* and be located in the `'\sd\netdata'` folder on your server.

Once you have your list saved to that location and under that name, SD-MobileLink will see it, and upload to the remote server. Each tech's SD-Mobile program will then see the data, and download for his use.

Now we'll describe a few different ways to approach creation of this file. We'll begin with the easiest.

A. Copy Glade's Setup

To make getting into it maximally easy, I have created a ready-to-use *RateSheet.txt* file. It's adapted from a flat-rate system I had in my service business years back. Because it's from years back, many of the items are dated, but for lack of anything better to start with, you might try it.

To do so, all that's needed is to open the following folder (it's on the internet, clicking on it should connect you there):

<http://rossware.net/downloads/SDM/FlatRateFiles.zip>

Inside, you'll see two files. One is called *RateSheet.txt*. Copy that file and paste it to the `\sd\netdata` folder on your server. That's it.

You may not like my particular flat-rate scheme, but at least, by adopting it even temporarily, you'll have an operational Flat-Rate list, and with almost zero effort.*

B. Use Glade's Excel/Creator Tool (it's free)

In the same folder where you found the *RateSheet.txt* file, you'll see another called *FlatRateCreator.xls*. Given the extension, you'll likely recognize it's an Excel file.

Copy then paste this file to a convenient location, then open it in Excel. Upon doing so, you'll see that columns F and G contain text in red. The text is red to signify these are base values, which you can change, and have actual rates (in the direct line-items) change in consequence.

* Upon examining it, you'll see my flat-rate setup has an extra column, beyond what I described as the basic four. It's titled NoteField. This is a field I used to denote the *make* of product each line-item applied to (as in WP for Whirlpool, MA for Maytag, etc.). In a number of cases, you'll notice the two letter abbreviation is AL. This means the line-item is not specific to any make; it refers, essentially, to all.

You'll also notice each of the job Codes begin with a two-letter sequence. This denotes the kind of machine the item applies to. Thus, DI is disposal, DW dishwasher, and so on. You'll see some entries for MS, and may wonder what kind of machine that is. It stands for miscellaneous. These line items are sort of generic in that they describe work items that might be done on most any kind of machine.

To be more specific, each line-item has a **red** column that represent the number of minutes I've figured as an average (a generous average, to be honest) for the work-item described. In the next column, you'll see there's a figure for your base hourly rate, and another for the foundation charge on top of which others begin. The idea is that each line-item's actual charge is calculated on the basis of values you are permitted to change in these locations.

Thus (and as an example), if you changed the base hourly rate to \$120, and a particular line-item had average minutes set at 30, the system would auto-calculate the second-column charge for that item at \$60. If your foundation charge (kind of like a service call) was set at, say, \$75, it would auto-calculate the first-column charge (for same item as just described) at \$135.

Anyhow, the idea is you can vary those two simple numbers to suit preference, and all the actual rates change immediately. You can also do any other editing you wish (remove line-items, add new ones, change estimated minutes, etc.)

Bear in mind that what you're dealing with here is a tool to create, change or otherwise customize rates. It is not the actual file that SD-Mobile needs. Once you've used the tool to makes the line-items and rates just as wanted, the next step is *pull out* the operational data, and place it in a file (and in the particular format) SD-Mobile needs.

As a first step in making this transition, you need to pull the operative text, and place it in a new spreadsheet.

To do this, use your mouse to select all the cells that contain black text (those are the actual line-items that will go into the final file, sans the **red** column that contains estimated average minutes). With that text selected, hit *Ctrl-C* on your keyboard to copy to the Windows Clipboard (or *right-click* with your mouse and in the popup select *Copy*). Then, open a new Excel sheet, *right-click* in the top-left cell, and in the popup pick the sequence: *Paste Special>>>Values*.

The above action will insert the particular text, as previously copied, into the new sheet (please note that a simple *Paste* would have copied the underlying *formulas*, rather than resultant values, and that's not what you want here).

Now you'll want to save that new Excel sheet with the name (and in the location) where SD-Mobile can use it (as described earlier). To do this, choose the sequence: *File>>>Save As>>>Save as Type = Text (tab delimited)*, then pick the correct path and filename.

Voila! You should now have your customized file.

C. Buy an Excel/Creator Tool

There's a guy name Mark Fearnough who's put together a much more sophisticated Excel/Creator tool than mine (it's underlying, textual line-items are likely more up-to-date, as well). To a significant extent, his works on the same principle, where you can change a variable and have all actual rates adjust, but a whole lot more time and effort has gone into his. Mark sells his *sophisticated* tool for \$100.

If you use it, you'll need to do the same extraction/save-as process as described in conjunction with my tool (in other words, to go from the spreadsheet/calculator mode to actual file as used by SD-Mobile).

If interested, contact Mark at flatrate@appliancesvc.com, or call 831-426-8299 (ext 105).

D. Create Your Own List from Scratch

If you examine the *RateSheet.txt* file I've created, you'll see the structure that's required. It truly is simple. It's just lines of text, each describing a work item, and each containing (within the line) four (or, optionally, five) items of text, each separated by a tab.

When you load this kind of structure into Excel, that program will line up the fields in nice columns. If you open it in Word or similar, those programs will typically not line up the columns so nicely, though in fact the content is the same.

Regardless, this content/structure is the simple end result you're seeking. To produce it, you can use Excel or whatever else seems most convenient. For most people, Excel (or similar) is likely best.

The basic thing to remember, to get from Excel to the simple, text-only, tab-delimited format, you must *save in that format*. It's an option in the "Save As" dialog box when you go save.

E. My Heart Felt Apology

In regard to creating your flat-rate list, most of the above discussion assumes you're an *appliance* servicer. Neither my list nor Mark's will apply if you're in another trade (though, at minimum, you *could* use either as kind of a model to create your own).

Regardless, if you're in another trade, it's obvious the pre-made options (above-described) will not in the end work for you. You'll have to begin at a more basic, "from-scratch" stage. We're sorry.

On the other hand, if you do create your own Flat-Rate list and are proud of it, we'd be happy to advertise it here. Indeed, if it's really good, you may even want to offer it for sale, just as Mark Fearnough has his. We'll be happy to help.