

Change Rate Values

When users want to change rate values, can use “Change” functionality

- Step 1: When users need to change rate values, export the required table, and make changes to values
- Step 2: In system generated column “Change Version” provide value as “Change” against the row in which changes are made and save the file.
- Step 3: Select and “Import” required rate table to override.
- Step 4: In “Rate Table List” screen select the required rate table by clicking “Rate Table Display Name”, updated values with rate table structures will be displayed in Solartis Builder.

Delete Rate Values

When users want to delete rate values, can use “Delete” functionality

- Step 1: When users need to delete rate values, export the required table, and make changes to values
- Step 2: In system generated column “Change Version” provide value as “Delete” against the row in which rate values should be deleted and save the file.
- Step 3: Select and “Import” required rate table to override.
- Step 4: In “Rate Table List” screen select the required rate table by clicking “Rate Table Display Name”, updated values with rate table structures will be displayed in Solartis Builder.

Demote Rate Table

When users want to make changes in “Live” rate values (or) change the status of rate values can use “Demote” functionality

- Step 1: When users need to demote rate values, export the required table.
- Step 2: In system generated column “Change Version” provide value as “Demote” against the row in which rate values are present and save the file.
- Step 3: Select and “Import” required rate table to override.
- Step 4: In “Rate Table List” screen select the required rate table by clicking “Rate Table Display Name”, updated values with rate table structures will be displayed in Solartis Builder.

Here is example to manage rate tables and values

Construction Type	Factor
Frame	1.00
Masonry	0.90
Reinforced Concrete	0.80
Superior	0.80
Steel	0.90

As Prerequisite, defined the schema for the rate table which contains factors for construction factor. Now we need to create a rate table and import the rate values into Solartis Builder. Follow the mentioned steps to create rate table

Create a Rate Table

- **Step 1:** Login to Solartis Builder > Manage Product > Select a Product > Hamburger Menu > Rate Table > Create a Rate Table.
- **Step 2:** Rate Table Information

Rate Table Name: ConstructionType

Rate Table Display Name: Construction Type

Purpose: Table which contains Construction Type and factors

Is this a table with bulk records: No (Since it contains only 5 rate values)

- **Step 3:** Add Column - add two columns since schema have one column for rate values (input) and another one for rate factors (output)

Column - 1

Is this column referring to a lookup table? No (Since lookup table is not created for the rate values if created choose "Yes")

Reference Table: Disable

Column Name: Construction_Type

Description: Contains values for construction type

Column Category: select "Input" (in our example the column contains the required values to fetch the rate factor)

Select operator: Select "Exact Match" (in our example if the values match the construction type corresponding rate factor should be fetched)

Data Type: Select "Char" (in our example construction type values contains alphabets only)

Length: 20

Sequence: 1

Select Key Field: Select the attributes from the picker, where the values should be stored

Click on “Save” to add column to rate table successfully

Column - 2

Is this column referring to a lookup table? No (Since lookup table is not created for the rate values if created choose “Yes”)

Reference Table: Disable

Column Name: Construction_Type_Factor

Description: Contains rate factor for construction type

Column Category: select “Output” (in our example the column contains the rate factor for construction type)

Select operator: For “Output” column the Select operator is not required so it will be hidden

Data Type: Select “Decimal” (in our example construction type factor contains decimal values only)

Length: 4

Number of Decimal: 2

Sequence: 2

Select Key Field: Select the attributes from the picker, where the values should be stored

Click on “Save” to add column to rate table successfully

- **Step 4:** Once columns are added, click on “Create Rate Table”, to save the info and system will take few minutes to create the rate table. The rate table will be displayed on the “Rate Table List” screen.

Add Rate Value

- Select the created rate table “Construction Type” by using checkbox and click on “Actions” drop-down, select “Export” the rate table will be downloaded to local system.
- Open the rate table file and provide the required data as per schema. As mentioned in “[Add Rate Value](#)” provide “Add” in the “Change Type” column to add the rate values. Attached is the image for reference.

- “Import” the rate table and once saved successfully, click on “Construction Type” link under “Rate Table Display Name” column to view the rate values of the table. Attached is the image for reference.

Construction Type								Find Rate/Factor applied as of: <input type="text" value="MM/DD/YYYY"/>   Action > <input type="button" value="Select"/>
CONSTRUCTION_TYPE ◆	CONSTRUCTION_TYPE_FACTOR ◆	APPLICABLE_FROM_DATE ◆	EFFECTIVE_DATE ◆	EXPIRATION_DATE ◆	CHANGE_VERSION ◆	PRIORITY ◆	STATUS ◆	
Frame	1.00	01/31/2024	01/31/2024	01/31/2024	CV_15843_02_02192024_V3001	100	DEV	
Masonry	0.90	01/31/2024	01/31/2024	01/31/2024	CV_15843_02_02192024_V3001	100	DEV	
Reinforced Concrete	0.80	01/31/2024	01/31/2024	01/31/2024	CV_15843_02_02192024_V3001	100	DEV	
Superior	0.80	01/31/2024	01/31/2024	01/31/2024	CV_15843_02_02192024_V3001	100	DEV	
Steel	0.90	01/31/2024	01/31/2024	01/31/2024	CV_15843_02_02192024_V3001	100	DEV	

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Change Rate Value

- Select the created rate table “Construction Type” by using checkbox and click on “Actions” drop-down, select “Export” the rate table will be downloaded to local system.
- Open the rate table file and provide the value as “0.95” against the row “Masonry” in the “CONSTRUCTION_TYPE_FACTOR”. As mentioned in “[Change Rate Value](#)” provide “Change” in the “Change Type” column. Attached is the image for reference.

- “Import” the rate table and once saved successfully, click on “Construction Type” link under “Rate Table Display Name” column to view the rate values of the table. The row which provided with “Change” in “Change Version” column will be removed from the table. Attached is the image for reference.

Delete Rate Value

- Select the created rate table “Construction Type” by using checkbox and click on “Actions” drop-down, select “Export” the rate table will be downloaded to local system.
- Open the rate table file and provide “Delete” against the row “Masonry” in the “Change Type” to delete the rate value as mentioned in “[Delete Rate Value](#)”. Attached is the image for reference.

- “Import” the rate table and once saved successfully, click on “Construction Type” link under “Rate Table Display Name” column to view the rate values of the table. The row which provided with “Delete” in “Change Version” column will be removed from the table. Attached is the image for reference.

Construction Type							
Find Rate/Factor applied as of : <input type="text" value="MM/DD/YYYY"/> <input type="button" value="clear"/> Action > <input type="button" value="Select"/>							
CONSTRUCTION_TYPE ◆	CONSTRUCTION_TYPE_FACTOR ◆	APPLICABLE_FROM_DATE ◆	EFFECTIVE_DATE ◆	EXPIRATION_DATE ◆	CHANGE_VERSION ◆	PRIORITY ◆	STATUS ◆
Frame	1.00	01/31/2024	01/31/2024	01/31/2024	CV_15843_02_02192024_V3001	100	DEV
Reinforced Concrete	0.80	01/31/2024	01/31/2024	01/31/2024	CV_15843_02_02192024_V3001	100	DEV
Superior	0.80	01/31/2024	01/31/2024	01/31/2024	CV_15843_02_02192024_V3001	100	DEV
Steel	0.90	01/31/2024	01/31/2024	01/31/2024	CV_15843_02_02192024_V3001	100	DEV

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Demote Rate Value

- Select the created rate table “Construction Type” by using checkbox and click on “Actions” drop-down, select “Export” the rate table will be downloaded to local system.
- Open the rate table file and provide “Demote” against the row “Reinforced Concrete” in the “Change Type” to demote the rate value from “Live” to “Dev” as mentioned in “[Demote Rate Value](#)”. Attached is the image for reference.
- “Import” the rate table and once saved successfully, click on “Construction Type” link under “Rate Table Display Name” column to view the rate values of the table. The row which provided with “Demote” in “Change Version” column, the status has been changed from “Live” to “Dev” in the table. Attached is the image for reference.