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Billing rates history

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The billing rates history feature will allow you to use different rates (for a specific project or user) in a different timeframe. The billable reports will also show time tracked according to old and new billing rates.

If the history is turned off every change in the billing rates will be applied to all previous and future time entries.

But if the history is turned on changes will be applied only to future time entries and the already tracked time will be counted according to old billing rates.

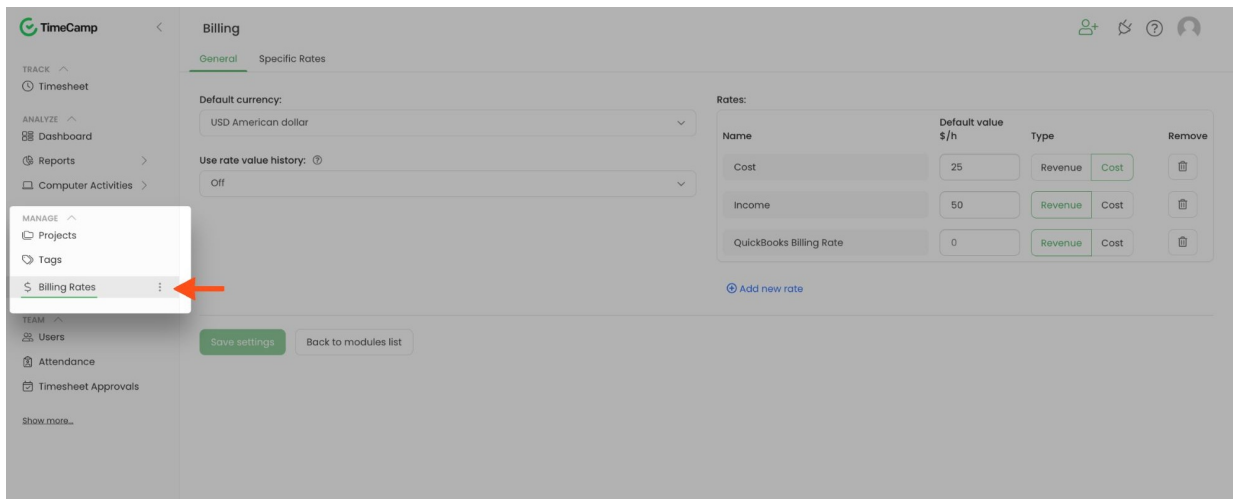
Rates history is available only in Premium and Ultimate plans.

Here is a small example of how the reporting looks when the rates history is enabled and a new billing rate was applied:

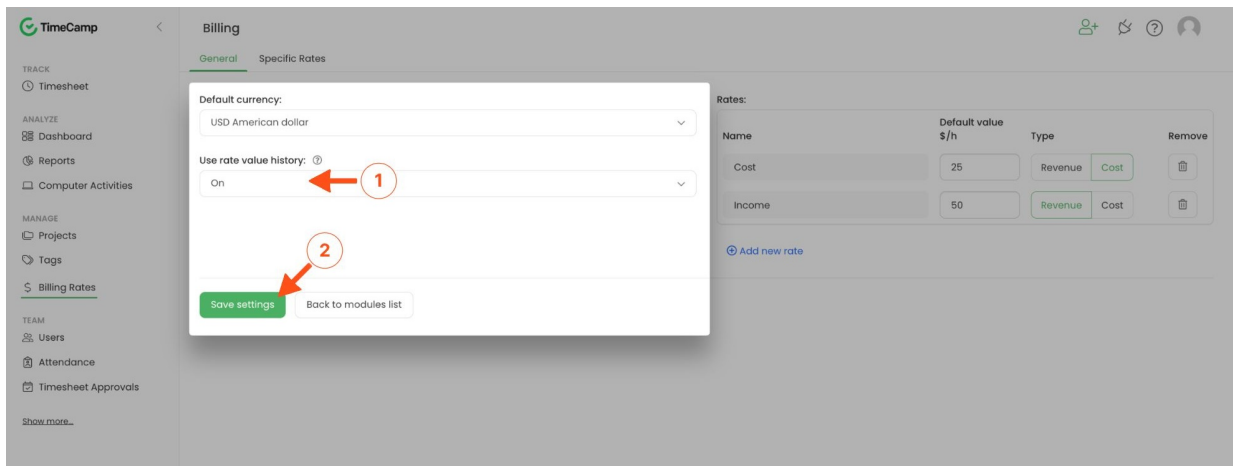
Employee	Month	Date	Path	Task	Time	Income/h	Amount	QuickBooks Billing Rate	Amount	Total amount
Iris	01/2023	2023-01-02	Marketing	Brief	06: 00: 00	\$69.00	\$414.00	\$56.00	\$336.00	\$750.00
Iris	12/2022	2022-12-28	Marketing	Brief	04: 00: 00	\$49.00	\$196.00	\$56.00	\$224.00	\$420.00
Total					10: 00: 00		\$610.00		\$560.00	\$1,170.00

How to enable the billing rates history?

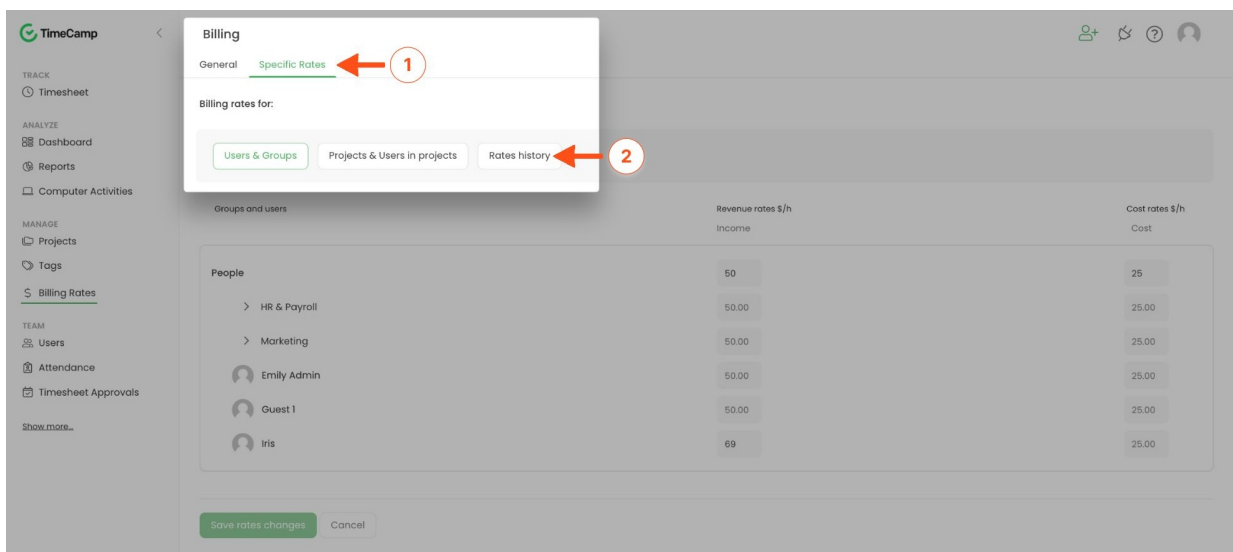
To enable this feature, open the **Billing Rates** module on the left side menu.



You'll find the option **Use rate value history** on the left-hand side. Turn it **ON** and click on the green **Save settings** button.



From now on you can find the additional tab under the Specific Rates section named **Rates history**.



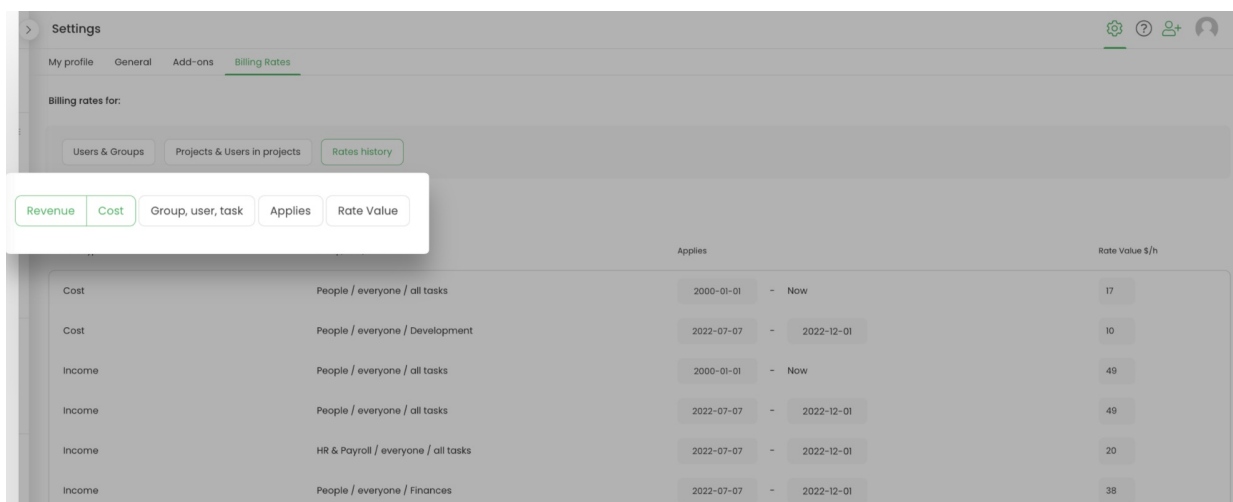
How to edit the history of billing rates?

The Rates history tab allows checking when and what rate was applied. If you need to edit some of your rates from the past, here you can change the **start date** of that rate and its **value**.

For example, if you changed the rate to one of your projects and the history feature is enabled, the new rate would be applied to all your time entries since the day you edited it. For all previous time entries, the old billing rate would be counted. If you need to change the old rate for previous time entries or change the timeframes of this rate, you can go to the Rates history tab and change its values.

First, you can use some of the filters we prepared to find the specific row you're looking for. You can filter rates by:

- **type** of rate (revenue/cost);
- **group, user, or task** the rate is assigned to;
- **date** when the rate applies;
- **value** of the rate;



The screenshot shows the 'Billing Rates' settings page. At the top, there are tabs for 'Users & Groups', 'Projects & Users in projects', and 'Rates history'. Below these, there are filter buttons for 'Revenue', 'Cost', 'Group, user, task', 'Applies', and 'Rate Value'. The main table displays a list of rates with columns for 'Type', 'Applies to', 'Start Date', 'End Date', and 'Rate Value \$/h'.

Type	Applies to	Start Date	End Date	Rate Value \$/h
Cost	People / everyone / all tasks	2000-01-01	Now	17
Cost	People / everyone / Development	2022-07-07	2022-12-01	10
Income	People / everyone / all tasks	2000-01-01	Now	49
Income	People / everyone / all tasks	2022-07-07	2022-12-01	49
Income	HR & Payroll / everyone / all tasks	2022-07-07	2022-12-01	20
Income	People / everyone / Finances	2022-07-07	2022-12-01	38

Next, to edit the **Start date** simply click on the timeframes filed and select the new date from the Calendar.

Income	HR & Payroll / everyone / all tasks	2022-07-07	-	2022-12-01	20
Income	People / everyone / Finances	2022-07-07	-	2022-12-01	38
Income	People / everyone / Analysis	2022-07-07	-	2022-12-01	42
Income	People / everyone / Development	2022-07-07	-	2022-12-01	100
Income	People / Emily Admin / all tasks	2022-07-07	-	2022-12-01	20
Income	People / James Stone / all tasks	2022-07-07	-	2022-12-01	20
Income	People / Mark Ed / all tasks	2022-07-07	-	2022-12-01	20
Income	People / Chrystal / all tasks	2022-07-07	-	2022-12-01	56
Income	People / Iris / all tasks	2022-07-07	-	2022-12-01	20
Income	People / Steve Smith / all tasks				20
QuickBooks Billing Rate	People / everyone / all tasks				56
QuickBooks Billing Rate	People / everyone / Finances				58
QuickBooks Billing Rate	People / everyone / Administration				58
QuickBooks Billing Rate	People / Emily Admin / all tasks	2022-08-11	-	2022-12-01	0
QuickBooks Billing Rate	People / James Stone / all tasks	2022-08-11	-	2022-12-01	0

To change the rate value click on the appropriate field and input a new value.

Income	HR & Payroll / everyone / all tasks	2022-07-07	-	2022-12-01	20
Income	People / everyone / Finances	2022-07-07	-	2022-12-01	38
Income	People / everyone / Analysis	2022-07-07	-	2022-12-01	42
Income	People / everyone / Development	2022-07-07	-	2022-12-01	100
Income	People / Emily Admin / all tasks	2022-07-07	-	2022-12-01	20
Income	People / James Stone / all tasks	2022-07-07	-	2022-12-01	20
Income	People / Mark Ed / all tasks	2022-07-07	-	2022-12-01	20
Income	People / Chrystal / all tasks	2022-07-07	-	2022-12-01	56
Income	People / Iris / all tasks	2022-07-08	-	2022-12-01	20
Income	People / Steve Smith / all tasks	2022-07-07	-	2022-12-01	20
QuickBooks Billing Rate	People / everyone / Finances	2022-07-07	-	2022-12-01	58
QuickBooks Billing Rate	People / everyone / Administration	2022-07-07	-	2022-12-01	58
QuickBooks Billing Rate	People / Emily Admin / all tasks	2022-08-11	-	2022-12-01	0
QuickBooks Billing Rate	People / James Stone / all tasks	2022-08-11	-	2022-12-01	0

Please don't forget to click on the green button **Save rates changes** at the bottom of the page.

Income	People / Mark Ed / all tasks	2022-07-07	-	2022-12-01
Income	People / Chrystal / all tasks	2022-07-07	-	2022-12-01
Income	People / Iris / all tasks	2022-07-08	-	2022-12-01
Income	People / Steve Smith / all tasks	2022-07-07	-	2022-12-01
QuickBooks Billing Rate	People / everyone / all tasks	2000-01-01	-	Now
QuickBooks Billing Rate	People / everyone / Finances	2022-07-07	-	2022-12-01
QuickBooks Billing Rate	People / everyone / Administration	2022-07-07	-	2022-12-01
QuickBooks Billing Rate	People / Emily Admin / all tasks	2022-08-11	-	2022-12-01
QuickBooks Billing Rate	People / James Stone / all tasks	2022-08-11	-	2022-12-01
QuickBooks Billing Rate	People / Mark Ed / all tasks	2022-08-11	-	2022-12-01
QuickBooks Billing Rate	People / Steve Smith / all tasks	2022-08-11	-	2022-12-01

