



## Provider Name and Billing Account Number Alignment

**Update: July 2022 cycle**  
**RPM Helpful Tips**

### Supplier (Provider) Name RPM Updating

- If you are using Multi Import for our statements into your system you can add our new supplier name via the Alias option

The screenshot shows the 'Commissions' section of the AppSmart interface. The main heading is 'Multi-Supplier Example 2'. Below this, there are three tabs: 'Imports & transfers', 'Account groups', and 'Addendums'. The 'Imports & transfers' tab is selected. On the left, there is a section for 'Commission variables'. On the right, there is a section for 'Multi-supplier import aliases'. This section includes a '+ Add an alias' button and a 'Setup' button. Below these buttons is a table with two columns: 'Alias' and 'Import'. The table contains one row with the alias 'Example 2' and the import name 'Multi Supplier Example'.

| Alias     | Import                 |
|-----------|------------------------|
| Example 2 | Multi Supplier Example |

- If you wanted to update your name in RPM to match ours, updating Supplier process

A supplier name change can be used to update a supplier name to a new one, this change is a display only change and will not affect anything other than the name of the supplier.

### **Top menu >> Suppliers**

Click on the **Supplier** name

| RPM TELCO                    |                 |                |
|------------------------------|-----------------|----------------|
| Commissions                  |                 |                |
| Suppliers                    |                 |                |
| + Add a supplier   Search    |                 |                |
| View All                     | 21              |                |
| Supplier                     | Primary contact | Account groups |
| <a href="#">ACC Business</a> |                 | 2              |
| <a href="#">Acme Hosting</a> |                 | 1              |
| <a href="#">AireSpring</a>   |                 | 2              |
| <a href="#">AT&amp;T</a>     |                 | 8              |
| <a href="#">Broadsmart</a>   |                 | 0              |
| <a href="#">Call One</a>     |                 | 0              |
| <a href="#">CenturyLink</a>  |                 | 6              |
| <a href="#">Comcast</a>      |                 | 0              |

Click **Name & logo**.

Supplier

Schedules

More

Info

Edit

Name & logo

RPM Software

Name

n/a

Enter the new name, click **OK** when done.

+ Upload logo

Logo

**RPM** Software

Supplier ☒

Test Supplier

OK Cancel

- **Quick Tip: Supplier name updates in RPM if done as name change or alias will keep “account number” aligned. IF done as a NEW supplier all together this will be seen as a new “account number” in RPM.**

### Billing Account Number (BAN aka Account Number) RPM Updating

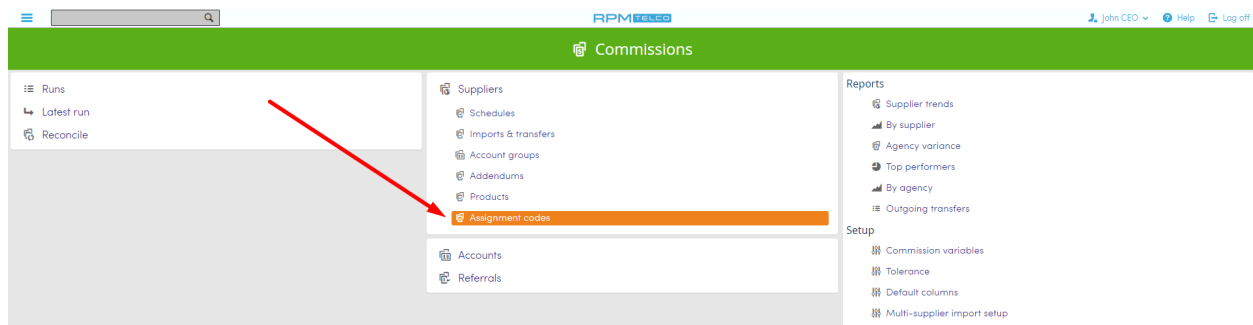
- Account Numbers in RPM can be included in account groups, assignments and referral groups in RPM to accommodate for various commission calculation processes so as “account numbers” these areas should be reviewed.
- **If you are using Account Number assignment via mass import of “Assignment Codes”**

## Import / Mass (re) Assign Assignment Codes [Print](#)

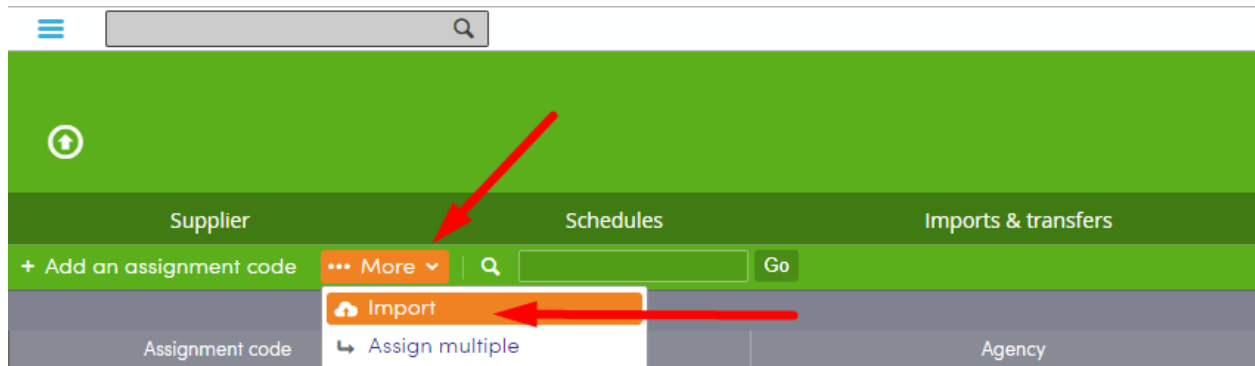
Modified on: Mon, 18 Oct, 2021 at 10:11 AM

Top menu >> Commissions >> Assignment Codes

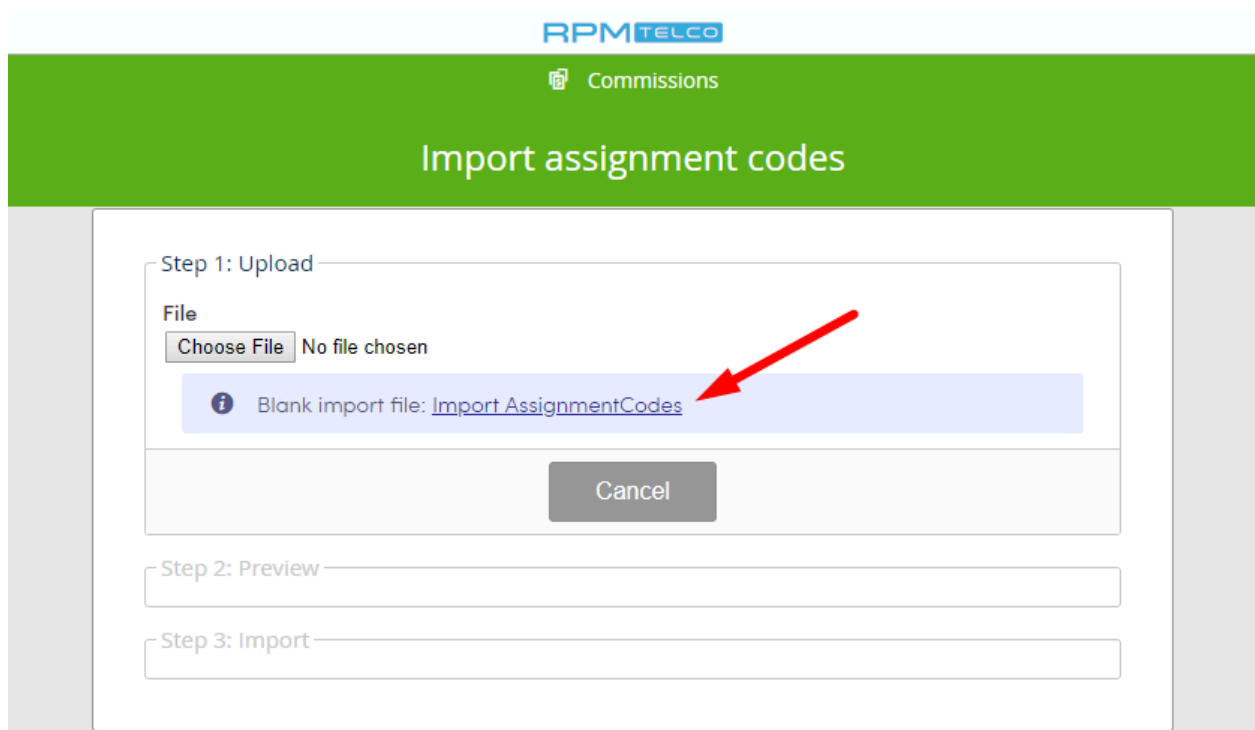
You can create or mass (re)assign Assignment Codes using the Assignment Code import template. If you click on the **Import** button the Excel template is available when you click the blue **Import Assignment Codes** link.



Click **More >> Import**.



Click **Import Assignment Codes**



To import and assign the new Assignment Codes or reassign existing ones use the same **Import** button and import the Assignment Codes template following the import wizard.

Click **Choose File**.

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Commissions

Import assignment codes

Step 1: Upload

File

Choose File No file chosen

Blank import file: [Import AssignmentCodes](#)

Cancel

Step 2: Preview

Step 3: Import

Either double click the Import file or select the file and click **Open**.

Click Upload to continue with the import.

RPMTELCO

Commissions

Import assignment codes

Step 1: Upload

File

Choose File Import\_Assig...des (4).xlsx

Blank import file: [Import AssignmentCodes](#)

Upload Cancel

Step 2: Preview

Step 3: Import

The preview after the import will help you review what the import will do. For Example, If you're looking to only re-assign Assignment Codes there should be a 0 under new.

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Commissions

## Import assignment codes

Step 1: Upload

✓ Import\_AssignmentCodes (4).xlsx (14.4 KB)

History

Step 2: Preview

|     |        |           |
|-----|--------|-----------|
| 0   | 0      | 0         |
| New | Update | Duplicate |

Import Discard

Step 3: Import

Finish the Import by pressing Import.

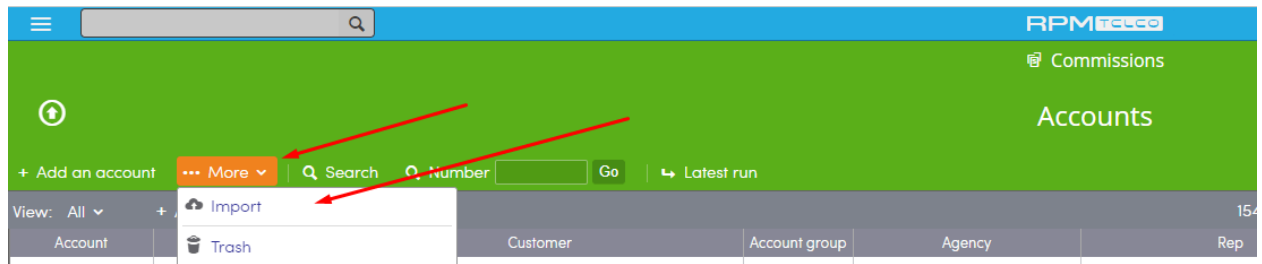
- **If you are using Assigned Reps method of assigning accounts you can update via mass Account Import method**

### Top menu >> Accounts

Accounts are typically created by the commission import however there can be a need to mass import your accounts for certain occasions. If you are using the "Assigned Reps" method of assigning accounts, you can use an Account import to mass update Rep assignments.

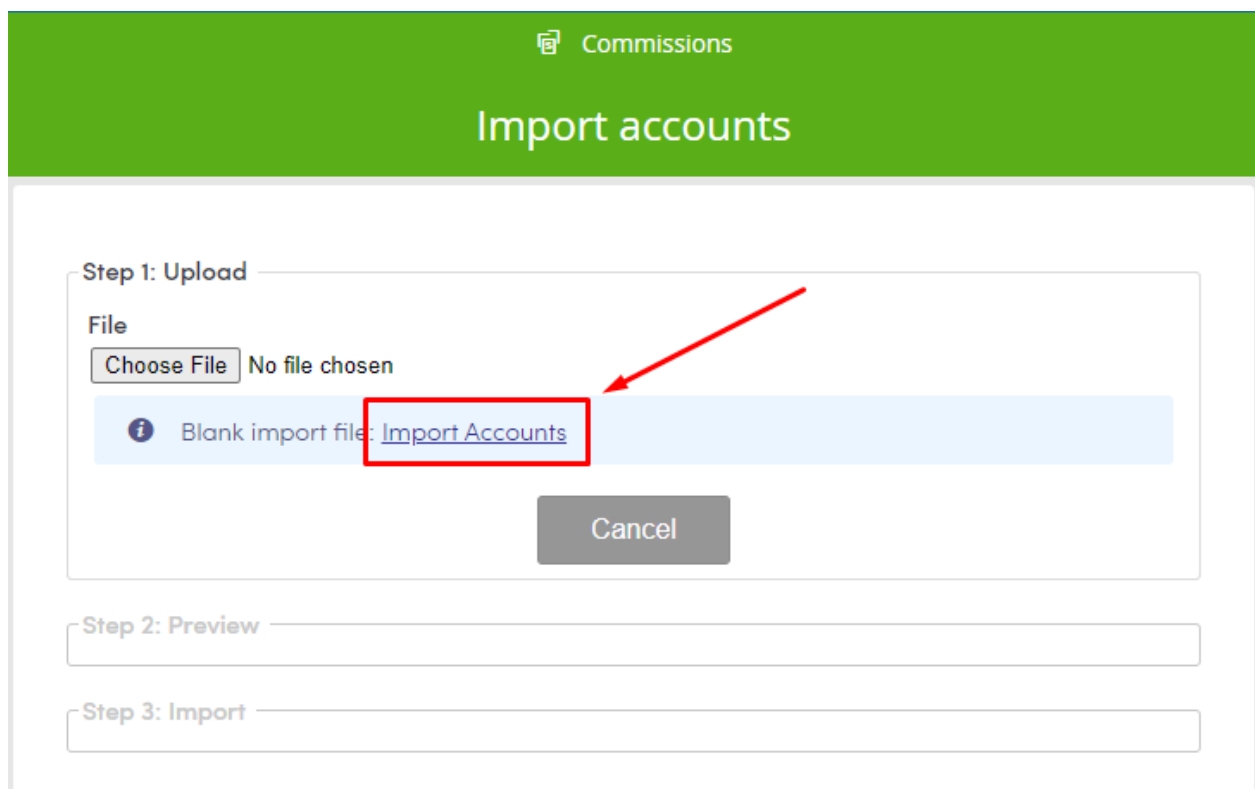
The account import requires a template which is attached to this article and also available from within your RPM subscription.

From the accounts page click More >> **Import**.



Click the blue link **Import accounts** which will open the excel template needed to import your accounts.

**\*\*Do not move the column headers in different positions as the import will fail. You can add any account basic fields to the end of the account import excel to import into basic fields.**



When you are ready and have saved the import file you can use the **Import** button on the accounts page and then select the file you want to upload.

## Import accounts

## Step 1: Upload

File

Choose File

No file chosen

Blank import file: [Import Accounts](#)

Cancel

## Step 2: Preview

## Step 3: Import

Click **Upload**.



## Import accounts

## Step 1: Upload

## File

Choose File

Import\_Accounts.xlsx

Blank import file: [Import Accounts](#)

Upload

Cancel

## Step 2: Preview

## Step 3: Import

If the accounts already exist, you will have to option to "Leave intact" or "Overwrite" existing data. If there is data in a field, "Leave intact" will not change any information and will only fill in blank fields. "Overwrite" would allow you to change existing data which would be used if you are trying to mass update information (ie. Agency/Rep assignments).

Select one of the options and then click **Import**.

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Commissions

Import accounts

Step 1: Upload

✓ Import\_Accounts (5).xlsx (47.5 KB)

History

Step 2: Preview

1,532  
Accounts

0  
New

1,532  
Update

0  
Duplicate

Existing data

☒ Leave intact ☐ Overwrite

Import

Discard

Step 3: Import

- **Quick Tip: If you are using “account groups” or “referrals” in RPM pull report of accounts to be able to update those impacted as needed by adding into specified account group or including/excluding in associated referrals set up.**

- **Account Group Report:**

- Click on Accounts
    - Click Add a View
    - Add Columns: Account, Supplier, Agency, Rep, Account group
    - Click Ok, Download

- **Referral Report:**

- Click on Commissions
    - Click on Referrals
    - Download on Right