



REVENUE – MISCELLANEOUS BILLING

CUSTOMER INQUIRY

This document will explore the various ways to review and research Customer data. This document does not cover how to create or edit customers.

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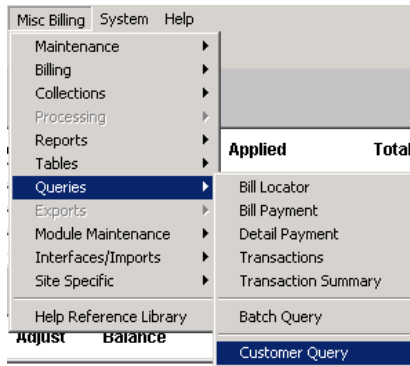


1. ABOUT THE CUSTOMER QUERY SCREEN

The Customer Query screen is a read-only tool designed to allow users to see a complete history of activity for a single customer at a time. The system provides information such as:

- Service address
- Mailing address
- Current and prior subscriptions
- Bill History for this customer
- Notes
- Reports

Using the pull down menus at the top of your screen, select **Misc Billing**►**Queries**►**Customer Query** to access the screen.



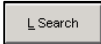

This screen will display:



1.1. To Search for a Customer

If you know the customer number you are looking for then just type in the number and press <enter>. If you do not know that customer number but do know the name or address, then you can easily search for the customer number.



To find a Customer, click the  or  (magnifying glass) button. This will present a list of different options to search:

- 1: By Service Location
- 2: By Street and Number
- 3: By Customer Name
- 4: By Mailing Address Name
- 5: By Parcel Location
- 6: By Parcel Number
- 7: By Parcel Primary Owner
- 8: By Enrolled Service

Option	Description																														
By Service Location	<p>To search by the House# AND Street Name of the service address, #, use the option called “1: By Service Location”.</p> <p>Click FIND to initiate a search. e.g., 108 BARRE yields this:</p> <table border="1"> <thead> <tr> <th colspan="3">By Service Location</th> </tr> <tr> <th>Service Address</th> <th>Cust#</th> <th>Na</th> </tr> </thead> <tbody> <tr> <td>1079 MAIN ST</td> <td>00002298</td> <td>10</td> </tr> <tr> <td>108 BARRETT'S MILL RD</td> <td>00000657</td> <td>CR</td> </tr> <tr> <td>108 BLUEBERRY LN</td> <td>00005297</td> <td>LE</td> </tr> <tr> <td>108 COMMERFORD RD</td> <td>00000552</td> <td>BE</td> </tr> <tr> <td>108 COMMONWEALTH AV</td> <td>00006367</td> <td>FO</td> </tr> <tr> <td>108 CRESCENT RD</td> <td>00002681</td> <td>FC</td> </tr> </tbody> </table> <p>The data is organized by HOUSE# and then Street. This means that you will see all of the “100” house numbers across all streets listed before the “101” house numbers across all streets.</p>	By Service Location			Service Address	Cust#	Na	1079 MAIN ST	00002298	10	108 BARRETT'S MILL RD	00000657	CR	108 BLUEBERRY LN	00005297	LE	108 COMMERFORD RD	00000552	BE	108 COMMONWEALTH AV	00006367	FO	108 CRESCENT RD	00002681	FC						
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108 BARRETT'S MILL RD	00000657	CR																													
108 BLUEBERRY LN	00005297	LE																													
108 COMMERFORD RD	00000552	BE																													
108 COMMONWEALTH AV	00006367	FO																													
108 CRESCENT RD	00002681	FC																													
By Street and Number	<p>To search by the STREET NAME of the Service Address and then the HOUSE#, use the option called “2: By Street and Number”.</p> <p>Click FIND to initiate a search. e.g., BARRE yields this</p> <table border="1"> <thead> <tr> <th colspan="5">By Street and Number</th> </tr> <tr> <th>Street</th> <th>Street#</th> <th>Service Address</th> <th>Cust#</th> <th>Name</th> </tr> </thead> <tbody> <tr> <td>BARNES HILL RD</td> <td>84</td> <td>84 BARNES HILL RD</td> <td>00001011</td> <td>BRATZI</td> </tr> <tr> <td>BARRETT'S MILL RD</td> <td>100</td> <td>100 BARRETT'S MILL RD</td> <td>00000655</td> <td>JEZAK</td> </tr> <tr> <td>BARRETT'S MILL RD</td> <td>108</td> <td>108 BARRETT'S MILL RD</td> <td>00000657</td> <td>CROZIER</td> </tr> <tr> <td>BARRETT'S MILL RD</td> <td>111</td> <td>111 BARRETT'S MILL RD</td> <td>00000967</td> <td>DRACH</td> </tr> </tbody> </table> <p>And the data will be organized by street name and then House # within the street name.</p>	By Street and Number					Street	Street#	Service Address	Cust#	Name	BARNES HILL RD	84	84 BARNES HILL RD	00001011	BRATZI	BARRETT'S MILL RD	100	100 BARRETT'S MILL RD	00000655	JEZAK	BARRETT'S MILL RD	108	108 BARRETT'S MILL RD	00000657	CROZIER	BARRETT'S MILL RD	111	111 BARRETT'S MILL RD	00000967	DRACH
By Street and Number																															
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BARRETT'S MILL RD	100	100 BARRETT'S MILL RD	00000655	JEZAK																											
BARRETT'S MILL RD	108	108 BARRETT'S MILL RD	00000657	CROZIER																											
BARRETT'S MILL RD	111	111 BARRETT'S MILL RD	00000967	DRACH																											
By Customer Name	<p>To search by the NAME of the customer located at the Service Address, use the option called “3: By Customer Name”.</p> <p>Click FIND to initiate a search.</p>																														



Option	Description
	e.g., HOWE yields this

By Mailing Address Name

To search by the NAME of the customer based on the Mailing Address, use the option called “4: By Mailing Name”.

Click **FIND** to initiate a search.

e.g., HOWE yields this

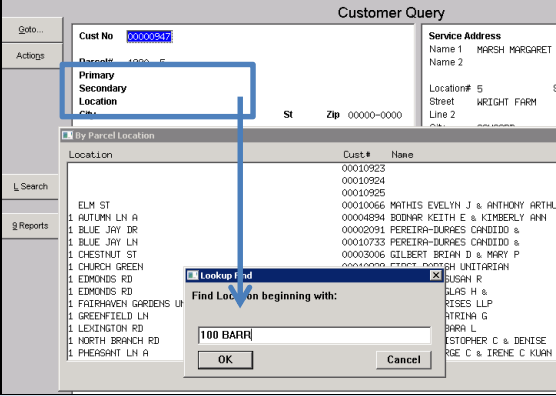
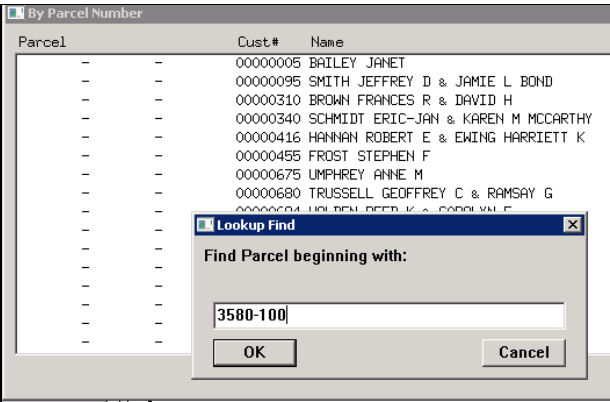
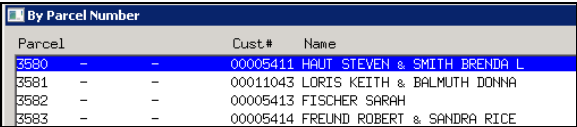
By Parcel Location

To search by the House# AND Street Name of the Parcel address, #, use the option called “5: By Parcel Location”.

Click **FIND** to initiate a search.

e.g., 108 BARRE yields this:



Option	Description
	 <p>The data is organized by House# and then Street. This means that you will see all of the “100” house numbers across all streets listed before the “101” house numbers across all streets.</p>
<p>By Parcel Number</p>	<p>To search by the Map-Block-Lot of the Parcel id#, use the option called “6: By Parcel Number”. Enter the full parcel id# or the beginning set of characters representing the desired parcel id. Be sure to enter the “-“ or “/” separators, as needed.</p> <p>Click FIND to initiate a search. e.g., 3580-100 yields this:</p>  
<p>By Parcel Primary Owner</p>	<p>To search by the NAME of the Current Owner of the Parcel, use the option called “7: By Parcel Primary Owner”. The format of the name being searched is exactly how it is entered from the Assessors office. In other words, if your assessing records maintain names by LAST, FIRST or LAST FIRST or FIRST LAST, then this is how you would need to search</p>



Option

Description

for the name.

Click **FIND** to initiate a search.
e.g., HOWE yields this

The screenshot shows the 'Customer Query' window. The 'Cust No' field is set to '00000000'. A search box is highlighted with a blue box, and a blue arrow points to it. Below the search box is a table of results. A 'Lookup Find' dialog box is open, showing 'Find Owner beginning with:' and the text 'HOWE' entered in the search field. The dialog has 'OK' and 'Cancel' buttons.

Name	Cust#	Location
1079 REALTY TRUST	00010923	
117 SEYMOUR STREET REALTY LLC	00010924	
152 COMMONWEALTH INC	00010925	
1586 MAIN STREET 2004 LLC	00002298	1079 MAIN ST
1641 MAIN STREET LLC	00005651	117 SEYMOUR ST
1641 MAIN STREET LLC	00006375	152 COMMONWEALTH AV
204 VIRGINIA ROAD REAL	00003499	1586 MAIN ST
27 HEMLOCK LLC	00003538	1641 MAIN ST
28 JUNCTION SQUARE LLC	00010920	1641 MAIN ST
315 MUSKETAQUID ROAD L		
35 LLC		
40 BEHARRELL STREET LL		

Name	Cust#	Location
HOWARD JOHN L JR & DENISE	00011065	268 PLAINFIELD RD
HOWELL MARK L & PAMELA J	00000540	668 ANNURSNAC HILL RD
HOWER PHILIP L & SUZANNE M TR	00005215	315 BORDER RD
HOWERTON BETSY B & J WILLIAM JR TR	00000435	994 LOWELL RD
HOWES GREGORY P & MARGARET A	00004512	23 SOUTH ST

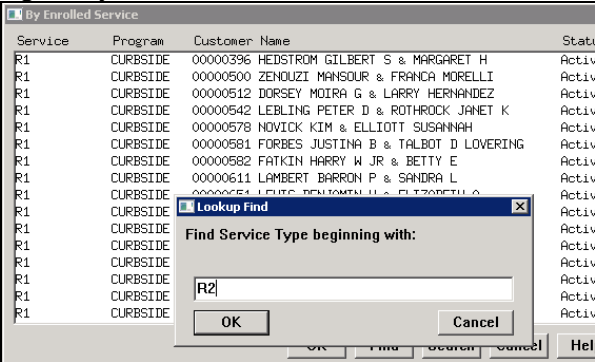
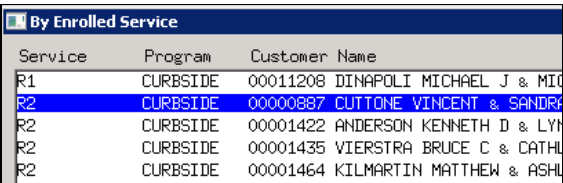
By Enrolled Service

Customers may be enrolled in a service for the variety of options available under curbside billing. To locate a customer enrolled in a service, use the option called “8: By Enrolled Service”.

The screenshot shows the 'Customer Maintenance' window. The 'Cust No' field is set to '00000007'. The 'Service Address' section shows 'Name 1: FEIGH LESLIE A S' and 'City: BELLINGHAM'. Below this is a 'Mailing Address' section with 'Name 1: FEIGH LESLIE A S' and 'City: CONCORD'. A blue arrow points to the 'Enroll in Service' button. Below the button is a table of service enrollment options.

Program	Service	Description	City	Enrolled	Start Date	End Date
CURBSIDE	RTS	Trash & Recycle Thursda			01-Apr-1996	01-May-2015



Option	Description
	<p>Click FIND to initiate a search. e.g., R2 yields this</p>  

2. ABOUT CUSTOMER ADDRESSES

2.1. About the Parcel Address

The parcel address is linked from the Assessing records to show the legal reference of the location. This is based on the town's Map-Block-Lot identification structure. The name of the CURRENT owner of the parcel is linked in and displayed on this screen.

Customer Query

<p>Cust No 30000007</p> <p>Parcel# 1565 /2 /</p> <p>Primary SMITH JOHN A</p> <p>Secondary SMITH JOHN A</p> <p>Location 149 SPENCER BROOK RD</p> <p>City CONCORD St MA Zip 01742-5226</p>	<p>Service Address</p> <p>Name 1 FEIGH LESLIE A S</p> <p>Name 2</p> <p>Location# 149 Street# 149</p> <p>Street SPENCER BROOK RD Unit#</p> <p>Line 2</p> <p>City CONCORD St MA Zip 01742-5226</p>
--	---

Real Estate Parcel Update Current Owner

<p>Parcel 1565 /2 /</p> <p>Account 1565 /2 /</p> <p>Location# 149 Street# 149</p> <p>Street SPENCER BROOK RD Unit</p> <p>City CONCORD State MA Zipcode 01742-5226</p>	<p>SMITH JOHN A</p> <p>SMITH JOHN A</p> <p>123 MAIN STREET</p> <p>CONCORD, MA 01742-5226</p> <p>TAATDDDAFTDFTTATAAFFFAAAAF</p>
--	--



2015 Real Estate		Bill Payment		Inc		
2 Bill#	501835-00	Year	2015	X Search...		
3 Owner	FEIGH LESLIE A S TR		Cash-Coin			
4 Location	149 SPENCER BROOK RD		Cash-Paper			
5 Account	1565 /2 /		Check			
6 Parcel	1565 /2 /		Other			
Bill Payment		Detail Payment		Transactions		
		Q Trx Summary		Q Attachments		
		Z MLCS				
Charge	Deduction	Abatement	Interest	Net Bill	Paid	Refu
Qtr 1	5639.27		542.91	6182.18		
Qtr 2	5639.27		339.58	5978.85		
Qtr 3	5712.96		142.44	5855.40		
Qtr 4	5712.96			5712.96		
Bill Totals	22704.46		1024.93	23729.39		
Owner of Record			Current Owner			
FEIGH LESLIE A S TR			SMITH JOHN A			
FEIGH BREHT T TR			SMITH JOHN A			
149 SPENCER BROOK RD			123 MAIN STREET			
CONCORD, MA 01742-0000			CONCORD, MA 01742-5226			
			TAATDDAFTDFTTATAGF ARAAFDITFTFTFTFTT			

2.2. About the Service Address

The service address is the physical address where the curbside collection activity is performed.

If a Parcel# is entered on the Customer record, then the Service Address is defaulted from the Parcel location on file

Customer Maintenance	
Cust No	00000003
Parcel#	1565 /7 /
Primary	BEAMER DAVID B
Secondary	BEAMER AMY M
Location	383 POPE RD
City	CONCORD St MA Zip 01742-0000
Service Address	
Name 1	BEAMER DAVID B
Name 2	BEAMER AMY M
Location#	383 Street# 383
Street	POPE RD Unit#
Line 2	
City	CONCORD St MA Zip 01742-5205

It may then be edited (to refine the address if needed), by simply typing over the data that is shown.

Customer Maintenance	
Cust No	00000003
Parcel#	1565 /7 /
Primary	BEAMER DAVID B
Secondary	BEAMER AMY M
Location	383 POPE RD
City	CONCORD St MA Zip 01742-0000
Service Address	
Name 1	BEAMER DAVID B
Name 2	BEAMER AMY M
Location#	383 Street# 383
Street	POPE RD Unit# 1234
Line 2	BACK OF HOUSE
City	CONCORD St MA Zip 01742-5205



2.3. About the Mailing Address

The mailing address is the physical location where the bills will be delivered. This can be different than the service address and/or the parcel address.

Customer Maintenance

Cust No 00011221 Parcel# 1565 /7 / Primary BEAMER DAVID B Secondary BEAMER AMY M Location 383 POPE RD City CONCORD St MA Zip 01742-0000	Service Address Name 1 BEAMER DAVID B Name 2 BEAMER AMY M Location# 383 Street# 383 Street POPE RD Unit# Line 2 City CONCORD St MA Zip 01742-5205
--	--

1 Customer 2 Attachments 3 Bill History 4 Trx History 5 Notes 6 Custom Fields 7 Field Logs

Mailing Address <input type="checkbox"/> Same as Service Address	
Name 1 Name 2 Line1 Line2 Line3 Line4 Line5 City St Zip 00000-0000 Country	Phone 1 (000) 000-0000 Ext 0000 Typ Phone 2 (000) 000-0000 Ext 0000 Typ Phone 3 (000) 000-0000 Ext 0000 Typ E-mail Bill <input type="checkbox"/> E-mail Addr

But, if you wish to set the mailing address to be the same as the service address, just click the checkbox. In doing so, the system will default the mailing address to the service address of the customer.

Customer Maintenance

Cust No 00011221 Parcel# 1565 /7 / Primary BEAMER DAVID B Secondary BEAMER AMY M Location 383 POPE RD City CONCORD St MA Zip 01742-0000	Service Address Name 1 BEAMER DAVID B Name 2 BEAMER AMY M Location# 383 Street# 383 Street POPE RD Unit# Line 2 City CONCORD St MA Zip 01742-5205
--	--

1 Customer 2 Attachments 3 Bill History 4 Trx History 5 Notes 6 Custom Fields 7 Field Logs

Mailing Address <input checked="" type="checkbox"/> Same as Service Address	
Name 1 BEAMER DAVID B Name 2 BEAMER AMY M Line1 383 POPE RD Line2 Line3 Line4 Line5 City CONCORD St MA Zip 01742-5205 Country	Phone 1 (000) 000-0000 Ext 0000 Typ Phone 2 (000) 000-0000 Ext 0000 Typ Phone 3 (000) 000-0000 Ext 0000 Typ E-mail Bill <input type="checkbox"/> E-mail Addr

Or, the mailing address may be completely different to the parcel address and/or the service address. In this case, manually type in the Mailing Address for the customer.



Customer Maintenance

Cust No 00011221

Parcel# 1565 /7 /

Primary BEAMER DAVID B
Secondary BEAMER AMY M

Location 383 POPE RD
City CONCORD **St** MA **Zip** 01742-0000

Service Address
Name 1 BEAMER DAVID B
Name 2 BEAMER AMY M

Location# 383 Street# 383
Street POPE RD
Line 2
City CONCORD

1 Customer 2 Attachments 3 Bill History 4 Trx History 5 Notes 6 Custom Fields 7

Mailing Address Same as Service Address

Name 1 JOHN SMITH
Name 2 C/O JS REALTY TRUST VENTURES
Line1 123 MAIN ST
Line2 SUITE 1234
Line3
Line4
Line5
City CONCORD St MA Zip 01742-0000

Phone 1 (000) 000-0000 Ext
Phone 2 (000) 000-0000
Phone 3 (000) 000-0000

E-mail Bill
E-mail Addr JSMITH@JSREALTYVENTURES.COM

The customer may also wish to receive the bills via e-mail by setting this checkbox and entering an email address.

3. ABOUT SUBSCRIPTIONS

If the customer is enrolled in any subscription programs then they will be displayed here showing the start and end date of the last bill sent to the customer.

Customer Query

Cust No 0000000

Parcel# 1565 /2 /

Primary SMITH JOHN A
Secondary SMITH JOHN A

Location 149 SPENCER BROOK RD
City CONCORD **St** MA **Zip** 01742-0000

Service Address
Name 1 FEIGH LESLIE A S
Name 2

1 Customer 2 Attachments 3 Bill History 4 Trx History

Mailing Address Same as Service Address

Name 1 FEIGH LESLIE A S
Name 2
Line1 149 SPENCER BROOK RD
Line2
Line3
Line4
Line5
City CONCORD
Country

Program Enrollment

Program	Service	Description	Qty	Enrolled	Start Date	End Date	Stop Date	Last Billed
CURBSIDE	RT7	Trash & Recycle Thursda		01-Sep-2013	01-Nov-2014	30-Apr-2015		01-Nov-2014

3.1. Current Subscriber

If the STOP DATE is null then this is a current subscriber.

Program	Service	Description	Qty	Enrolled	Start Date	End Date	Stop Date	Last Billed
CURBSIDE	RT7	Trash & Recycle Thursda		01-Sep-2013	01-Nov-2014	30-Apr-2015		01-Nov-2014



3.2. Former Subscriber

If the stop date is set, they are not a current subscriber or will stop being a current subscriber at the end of the current cycle.

Program Enrollment								
Program	Service	Description	Qty	Enrolled	Start Date	End Date	Stop Date	Last Billed
CURBSIDE	RT5	Trash & Recycle Wednesd		01-Jun-1993	01-Nov-2014	30-Apr-2015	20-Apr-2015	01-Nov-2014

4. ABOUT ATTACHMENTS

An unlimited set of documents may be associated with a customer including optionally attaching bills that are generated by the system.

Customer Query - Attachments

Goto...

Actions

Cust No 00004450

Parcel# 2326 /13 /

Primary THIBEAULT JOHN L & LINDA

Secondary

Location 87 NORTH BRANCH RD

City CONCORD **St MA** **Zip** 01742-3807

Service Address

Name 1 THIBEAULT JOHN L & LINDA

Name 2

Location# 87 Street# 87

Street NORTH BRANCH RD Unit#

Line 2

City CONCORD St MA Zip 01742-3807

1 Customer 2 Attachment (1) 3 Bill History 4 Trx History 5 Notes 6 Custom Fields 7 Field Logs (2)

Seq#	Description	Filename
1	Letter of address change sent in 4/1/15	Finnot_201250545800.pdf

View

Email

Remove

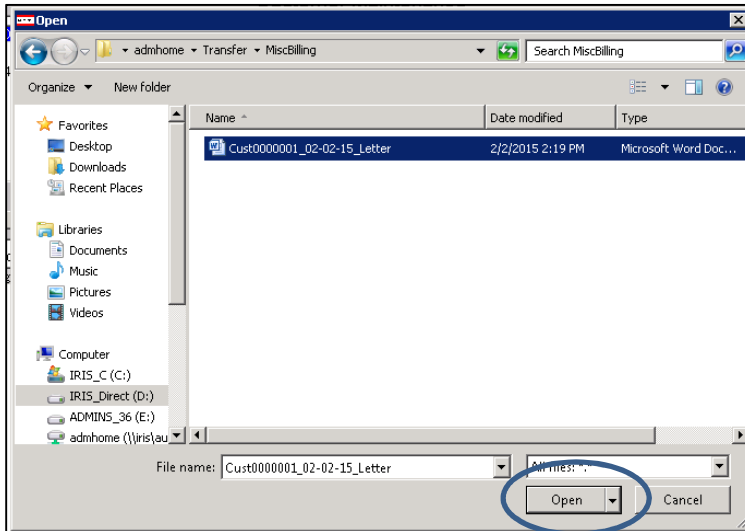
4.1. Add Attachment

You may attach documents to the customer record such as correspondence.

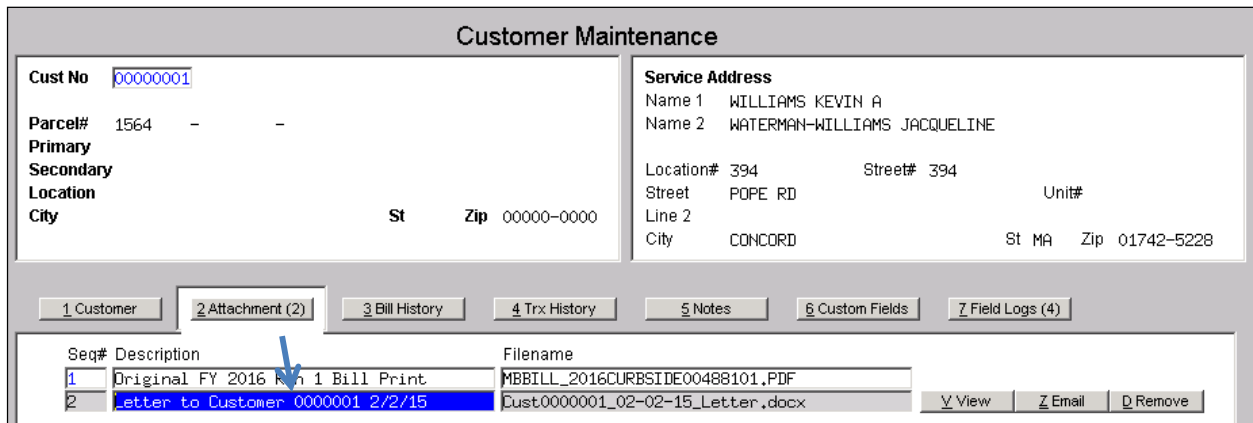
NOTE: You need to have previously scanned and saved the document – or saved it from some other source such as an email or a flash drive. The file may NOT be stored on your local hard drive. It must be stored in a folder that is accessible via the AUC server and available to other users of the AUC application. If you need assistance with this, please contact your System Administrator to determine where you should be saving these scanned files.



In order to attach, place a scanned copy of the document on the server and click the Add Attach button. The following windows dialog box will be displayed where you can find and choose the document to be attached.



Highlight the document and select **Open** to attach.



Optionally, enter a description of the document.

4.2. View Attachment

You may view the document that is attached. Highlight the desired document and select the View button on the right hand side of the screen. The document will be displayed.



1 Customer	2 Attachment (2)	3 Bill History	4 Trx History	5 Notes	6 Custom Fields	7 Field Logs (4)
Seq#	Description	Filename				
1	Original FY 2016 Run 1 Bill Print	MBBILL_2016CURBSIDE00488101.PDF				
2	Letter to Customer 0000001 2/2/15	Cust0000001_02-02-15_Letter.docx	<input type="button" value="View"/>	<input type="button" value="Email"/>	<input type="button" value="Remove"/>	

4.3. Email Attachment

You may email the document to any valid email address. To do so, highlight the desired document and select the Email button on the right hand side of the screen. The following prompt will be displayed.

1 Customer	2 Attachment (2)	3 Bill History	4 Trx History	5 Notes	6 Custom Fields	7 Field Logs (4)
Seq#	Description	Filename				
1	Original FY 2016 Run 1 Bill Print	MBBILL_2016CURBSIDE00488101.PDF				
2	Letter to Customer 0000001 2/2/15	Cust0000001_02-02-15_Letter.docx	<input type="button" value="View"/>	<input type="button" value="Email"/>	<input type="button" value="Remove"/>	

[AUC] 10000-Customer Maintenance [kathy]

Sending Attachment via Email

Optional: Enter Contact Name

Optional: Enter Note

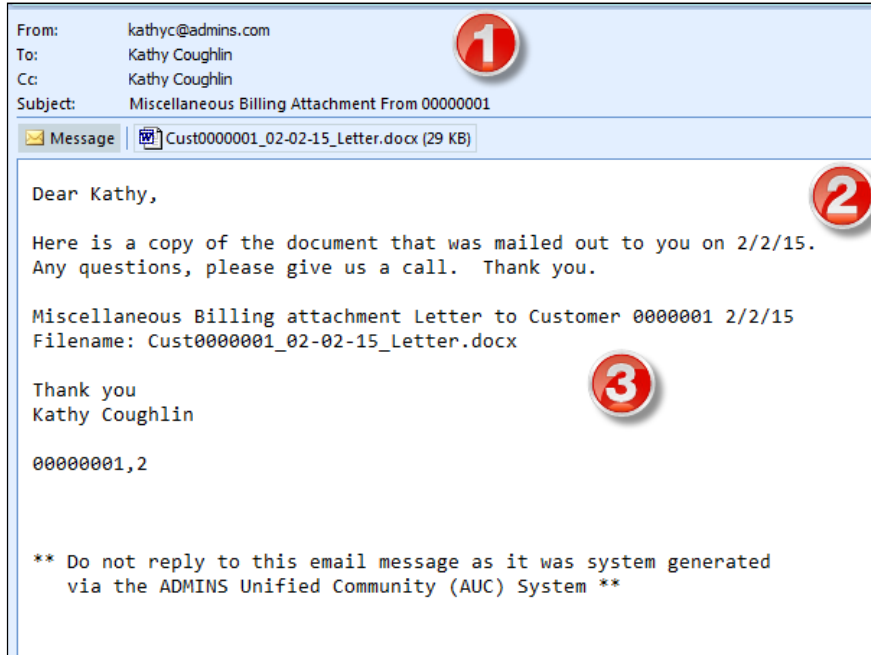
Optional: Enter Note

Required: Enter Email Address

Email Attachment

Attachment has been sent

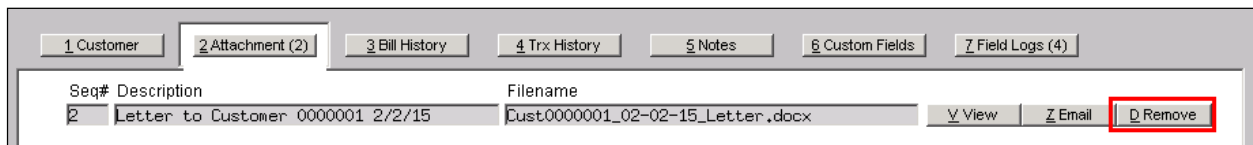
The email will look like this:



- 1 The FROM and CC addresses are from the user who initiated the email. The email address used is from their User Profile.
- 2 This information is from the contact name and note information entered on the prompt.
- 3 This is email body generated from the AUC system. It contains the customer number and the date of the email. It also contains the filename of the attachment. The salutation is the name in the users User Profile.

4.4. Remove Attachment

If the attachment was not added by the system it can be removed. To remove an attachment, select the attachment and click the **Remove** button.



This button will only appear on attachments that were not added by the system.

For example, in the screen capture shown below, the highlighted attachment does not have a Remove button.



1 Customer	2 Attachment (2)	3 Bill History	4 Trx History	5 Notes	6 Custom Fields	7 Field Logs (4)
Seq#	Description	Filename				
1	Original FY 2016 Run 1 Bill Print	MBBILL_2016CURBSIDE00488101.PDF				View Email
2	Letter to Customer 0000001 2/2/15	Cust0000001_02-02-15_Letter.docx				

5. ABOUT BILL HISTORY

As bills are issued for customers, they are permanently stored in the system. This screen will display all the bills that have been generated for this customer. To access this screen, click on the **Bill History** button.

Customer Maintenance - Bill History

Goto...	Cust No 0000001	Service Address	
Actions	Parcel# 1564 - -	Name 1 WILLIAMS KEVIN A	
	Primary	Name 2 WATERMAN-WILLIAMS JACQUELINE	
	Secondary	Location# 394 Street# 394 Unit#	
	Location	Street POPE RD	
	City	Line 2	
	St	City CONCORD	St MA Zip 01742-5228
	Zip 00000-0000		

1 Customer 2 Attachment (2) 3 Bill History 4 Trx History 5 Notes 6 Custom Fields 7 Field Logs (4)

Year	Program	Bill#	Charged	Paid	Refund	Adjust	Balance	Bill Date	Due Date	
2016	CURBSIDE	004881-01	105.00				105.00	01-Apr-2015	01-May-2015	Go To Bill
2015	CURBSIDE	004882-01	110.00				110.00	01-Nov-2014	01-Nov-2014	
2015	CURBSIDE	004881-02	110.00				110.00	01-May-2014	01-May-2014	
2014	CURBSIDE	004882-01	105.00				105.00	01-Nov-2013	01-Nov-2013	
2014	CURBSIDE	004872-02	105.00				105.00	01-May-2013	01-May-2013	
2013	CURBSIDE	004878-01	100.00				100.00	01-Nov-2012	01-Nov-2012	
2013	CURBSIDE	004872-02	100.00				100.00	01-May-2012	01-May-2012	
2012	CURBSIDE	004889-01	95.00				95.00	01-Nov-2011	01-Nov-2011	
2012	CURBSIDE	004852-02	95.00				95.00	01-May-2011	01-May-2011	
2011	CURBSIDE	004854-01	92.00				92.00	01-Nov-2010	01-Nov-2010	
2011	CURBSIDE	004828-02	92.00				92.00	01-May-2010	01-May-2010	
2010	CURBSIDE	004850-01	87.00				87.00	01-Nov-2009	01-Nov-2009	
2010	CURBSIDE	001030-02	87.00				87.00	01-May-2009	01-May-2009	
2009	CURBSIDE	001038-02	227.00			5.00	232.00	01-May-2008	01-May-2008	
2009	CURBSIDE	001034-01	79.00				79.00	01-Nov-2008	01-Nov-2008	
2008	CURBSIDE	004599-02	148.00				148.00	01-May-2007	01-May-2007	
2008	CURBSIDE	001037-01	74.00				74.00	01-Nov-2007	01-Nov-2007	
2007	CURBSIDE	004611-01	136.00				136.00	01-Nov-2006	01-Nov-2006	
2007	CURBSIDE	004593-02	68.00				68.00	01-May-2006	01-May-2006	
2006	CURBSIDE	004606-01	63.00				63.00	01-Nov-2005	01-Nov-2005	
2006	CURBSIDE	004595-02	63.00				63.00	01-May-2005	01-May-2005	

9 History List More

If there are more pages of bills, **More** will display in the lower left hand corner of the screen. Use your **Page Up** and **Page Down** keys to display the bills.

You can “drill down” to the Bill Payment screen for a particular bill by selecting the desired bill and clicking the **Go to Bill** button located on the right.



The screenshot shows a software interface with a top navigation bar containing buttons for '1 Customer', '2 Attachment (2)', '3 Bill History', '4 Trx History', '5 Notes', '6 Custom Fields', and '7 Field Logs (4)'. Below this is a table of bills:

Year	Program	Bill#	Charged	Paid	Refund	Adjust	Balance	Bill Date	Due Date
2016	CURBSIDE	004881-01	105.00				105.00	01-Apr-2015	01-May-2015
2015	CURBSIDE	004882-01	110.00				110.00	01-Nov-2014	01-Nov-2014
2015	CURBSIDE	004881-02	110.00				110.00	01-May-2014	01-May-2014

A red box highlights the 'Go To Bill' button in the top right of the table. A red arrow points from this button to the detailed bill payment summary below.

The detailed summary is titled '2016 Curbside Bill Payment Inquiry'. It includes fields for Bill# (004881-01), Year (2016), Owner (CURBSIDE SUBSCRIBER), Srv Adr (894 POPE RD), Cust# (00000001), and Parcel (1564). It also has sections for 'Tendered' (Cash-Coin, Cash-Paper, Check, Other) and 'Applied' (Total). Below this is a table of charges:

	Charge	Net Bill	Paid	Refund	Adjust	Balance
Run 1	105.00	105.00				
Bill Totals	105.00	105.00				Bal

5.1. Issue a List of Bills for this Customer

You can run a Customer Bill History Summary by clicking the History List button located on the left hand side of the screen. This report displays the bills within the criteria specified.

The screenshot shows the 'Customer Maintenance' dialog box. On the left side, there is a vertical menu with buttons for 'Goto...', 'Actions', and 'History List'. The 'History List' button is highlighted with a red box and a blue arrow points to it. The main area of the dialog shows customer information: Cust No (00000001), Parcel# (1564), Primary, Secondary, Location, City, St, and Zip (00000-0000). At the bottom, there are buttons for '1 Customer', '2 Attachment (2)', '3 Bill History', and '4 Trx History'. Below these buttons is a small table of bills:

Year	Program	Bill#	Charged	Paid	Refund
2016	CURBSIDE	004881-01	105.00		
2015	CURBSIDE	004882-01	110.00		

The output dialog box will display.

The screenshot shows a dialog box titled 'Task 10672: Customer Bill History Summary'. It has a title bar with a close button. The main area contains the following options:

- Run as: Preview Print PDF Excel
- If Printing use Duplex: Yes No

At the bottom, there are four buttons: 'Lookup', 'OK', 'Cancel', and 'Clear All'.

Upon completing your selections and clicking OK, the report will display or print:



10672-MBCUSBILHTSUM.REP Printed 02-Feb-2015 at 18:24:28 by KATHY Page 1
Town of ADMINS
Customer Bill History Summary

Customer#: 00000001
Owner: CURBSIDE SUBSCRIBER as of 18:24:28 on 02-Feb-2015
Service Address: 394 POPE RD

Year	Bill#	Program	Charges	Adjustments	Refunds	Payments	Balance
2016	004881-01	Curbside	105.00	.00	.00	.00	105.00
2015	004882-01	Curbside	110.00	.00	.00	.00	110.00
2015	004881-02	Curbside	110.00	.00	.00	.00	110.00
2014	004882-01	Curbside	105.00	.00	.00	.00	105.00
2014	004872-02	Curbside	105.00	.00	.00	.00	105.00
2013	004878-01	Curbside	100.00	.00	.00	.00	100.00
2013	004872-02	Curbside	100.00	.00	.00	.00	100.00
2012	004889-01	Curbside	95.00	.00	.00	.00	95.00
2012	004852-02	Curbside	95.00	.00	.00	.00	95.00
2011	004854-01	Curbside	92.00	.00	.00	.00	92.00
2011	004828-02	Curbside	92.00	.00	.00	.00	92.00
2010	004850-01	Curbside	87.00	.00	.00	.00	87.00
2010	001030-02	Curbside	87.00	.00	.00	.00	87.00
2009	001038-02	Curbside	227.00	5.00	.00	.00	232.00
2009	001034-01	Curbside	79.00	.00	.00	.00	79.00
2008	004599-02	Curbside	148.00	.00	.00	.00	148.00

6. ABOUT ALL TRANSACTIONS FOR A CUSTOMER

The transaction history screen displays all the transactions (bills, payments, refunds, adjustments, etc) that have taken place for a given customer. This screen is presented in Year order (highest to lowest).

The screenshot shows a web-based interface for viewing customer transactions. At the top, there are tabs for 'Customer', 'Attachment (2)', 'Bill History', 'Trx History', 'Notes', 'Custom Fields', and 'Field Logs (4)'. The 'Trx History' tab is selected, displaying a table of transactions. The table has columns for Year, Bill#, Description, Trx Date, Charges, Payments, Other, and Display - Tran Code Desc. The transactions are listed in descending order of year. A blue arrow points to a 'More' button in the bottom left corner of the table area.

If more than one page of transactions are available, **More** will be displayed in the bottom left hand corner of the screen. Use your **Page Up** and **Page Down** keys to move between pages.

7. ABOUT OTHER ADDITIONAL FIELDS TO DISPLAY

The **Display** button over the last column on the screen is used to display additional values on the screen. Click the button and additional options are presented to select and display on the screen.



The screenshot shows two views of the Customer Transaction History interface. The top view is titled 'Display - Tran Code Desc.' and shows a table with columns: Year, Bill#, Description, Trx Date, Charges, Payments, Other, and Display - Tran Code Desc. The bottom view is titled 'Display - Deposit Date' and shows a similar table with an additional 'Other' column containing dates. A red arrow points from the 'Display - Tran Code Desc.' view to the 'Display - Deposit Date' view, and another red arrow points from the 'Display - Tran Code Desc.' view to the 'Display - Deposit Date' option in the right-hand menu.

Year	Bill#	Description	Trx Date	Charges	Payments	Other	Display - Tran Code Desc.
2016	004881-01	1-Trash & Recycle Thu	01-Apr-2015	105,00			Billing
2015	004881-02	2-Trash & Recycle Thu	26-Mar-2014	110,00			Billing
2015	004882-01	1-Trash & Recycle Thu	26-Sep-2014	110,00			Billing

Year	Bill#	Description	Trx Date	Charges	Payments	Other	Display - Deposit Date
2016	004881-01	1-Trash & Recycle Thu	01-Apr-2015	105,00		01-Apr-2015	
2015	004881-02	2-Trash & Recycle Thu	26-Mar-2014	110,00		26-Mar-2014	
2015	004882-01	1-Trash & Recycle Thu	26-Sep-2014	110,00		26-Sep-2014	

7.1. Issue a History List

The History List display the history of bills for a customer based on the criteria entered.

The screenshot shows the 'Task 10670: Customer Transaction History Listing' dialog box. It has a title bar with a close button. The main area contains the following fields and options:

- Optional: Enter Bill Year Range: From Year: [] To Year: []
- Optional: Enter Program Type: []
- Run as: Preview Print PDF Excel
- If Printing use Duplex: Yes No
- Buttons: Lookup, OK, Cancel, Clear All

You can optionally select a Bill Year Range and/or a Program Type to drill down on the content you want to see or leave the prompts blank and display all.



10670-MBCUSTOMHIS.REP Printed 03-Feb-2015 at 08:15:28 by KATHY Town of ADMINS Page 1
Customer Transaction History Listing

Year: 2015
Customer#: 00000001
Owner: CURBSIDE SUBSCRIBER
Subscription: 01-May-2015 to 31-Oct-2015
Service Address: 394 POPE RD
Parcel: 1564--

Transactions posted on this account
as of 08:15:28 on 03-Feb-2015

Date Billed	Date Due	Bill#	Run#	Service	Transaction Description	Trx Date	Charges	Adjustments	Refunds	Payments	Transaction Balance
01-Apr-2015	01-May-2015	004881-01	1	Trash & Recycle Thursday	Billing	01-Apr-2015	105.00	.00	.00	.00	105.00
							105.00	.00	.00	.00	105.00
*** Bill Total ***							105.00	.00	.00	.00	105.00

Year: 2015
Customer#: 00000001
Owner: WILLIAMS KEVIN A
Subscription: 01-May-2014 to
Service Address: 394 POPE RD
Parcel: 1564--

Transactions posted on this account
as of 08:15:28 on 03-Feb-2015

Date Billed	Date Due	Bill#	Run#	Service	Transaction Description	Trx Date	Charges	Adjustments	Refunds	Payments	Transaction Balance
01-May-2014	01-May-2014	004881-02	2	Trash & Recycle Thursday	Billing	26-Mar-2014	110.00	.00	.00	.00	110.00
							110.00	.00	.00	.00	110.00
*** Bill Total ***							110.00	.00	.00	.00	110.00

7.2. Issue a Summary List

The Summary List displays the transactions for the customer for the history of the bills in summary format based on the criteria entered.

Task 10671: Transaction History Summary

Transaction History Summary

Optional: Enter Bill Year Range From Year: To Year:

Optional: Enter Program Type

Run as Preview Print PDF Excel

If Printing use Duplex Yes No

Lookup OK Cancel Clear All

You can optionally select a Bill Year Range and/or a Program Type to drill down on the content you want to see or leave the prompts blank and display all.



10671-METRNHISSUM.REP Printed 03-Feb-2015 at 08:22:47 by KATHY Page 1
Town of ADMINS
Transaction History Summary

Year: 2016
Customer#: 00000001
Owner: CURBSIDE SUBSCRIBER as of 08:22:47 on 03-Feb-2015
Service Address: 394 POPE RD
Bill#: 004881-01

Trx Date	Charges	Other Charges	Adjustments	Refunds	Payments	Description
01-Apr-2015	105.00	.00	.00	.00	.00	Billing
	105.00	.00	.00	.00	.00	

Year: 2015
Customer#: 00000001
Owner: WILLIAMS KEVIN A as of 08:22:47 on 03-Feb-2015
Service Address: 394 POPE RD
Bill#: 004881-02

Trx Date	Charges	Other Charges	Adjustments	Refunds	Payments	Description
26-Mar-2014	110.00	.00	.00	.00	.00	Billing
	110.00	.00	.00	.00	.00	

Year: 2015
Customer#: 00000001
Owner: WILLIAMS KEVIN A as of 08:22:47 on 03-Feb-2015
Service Address: 394 POPE RD
Bill#: 004882-01

Trx Date	Charges	Other Charges	Adjustments	Refunds	Payments	Description
26-Sep-2014	110.00	.00	.00	.00	.00	Billing
	110.00	.00	.00	.00	.00	

8. ABOUT CUSTOMER NOTES

The Notes screen is used to store notes about the customer. You can add, delete or email notes from this screen. These notes are for internal use and do not print on any Invoices or Receipts issued to a customer. However, please remember that all information stored in the AUC application should be considered available for public viewing and thus, private or sensitive information should not be managed here.

Customer Maintenance

Goto... Actions

Cust No: 00000001

Parcel# 1564 - -
Primary
Secondary
Location
City St Zip 00000-0000

Service Address
Name 1 WILLIAMS KEVIN A
Name 2 WATERMAN-WILLIAMS JACQUELINE
Location# 394 Street# 394 Unit#
Street POPE RD
Line 2
City CONCORD St MA Zip 01742-5228

1 Customer 2 Attachment (2) 3 Bill History 4 Trx History 5 Notes 6 Custom Fields 7 Field Logs (4)

Add A Note

Date	Time	User	Category	Notes	Edit Note	Email Now	Delete
03-Feb-2015	08:38:37	KATHY	INVSTK	2,2,15 An Invalid sticker was on the bin			

Entered: 03-Feb-2015
KATHY
Changed: 03-Feb-2015



8.1. Add a Note

To add a note, click the **Add A Note** button located on the left hand side of the screen. This will add a record for this customer with the current date and time and username. Using the **Edit Note** button you can then type your note information for this record.

The notes will appear in chronological order, with the most recent note appearing at the top of the screen

Date	Time	User	Category	Notes	
03-Feb-2015	08:43:48.	KATHY			8 Edit Note Delete
03-Feb-2015	08:38:37.	KATHY	INVSTK	2.2.15 An Invalid sticker was on the bin	
	00:00:00.				

Fill in or select from the lookup the category associated with this not. For instance, INVSTK for an invalid sticker.

Click the **Edit Note** button to add and/or edit a note to the line.

Edit Note for Customer 00000001

File Edit View Insert Format Help

Courier New (Western) 10 B U

2.2.15 An Invalid sticker was on the bin

Once note text has been added, the Email Note button will display.

8.2. Email Note Now

You may email any note “now” if you simply want to alert someone to this action as opposed to setting up a reminder for future reference. Click the **Email Now** button to access the prompts and indicate whom to email the note.



The Email Now button will not appear on the line until a note has been entered.



1 Customer		2 Attachment (2)		3 Bill History		4 Trx History		5 Notes		6 Custom Fields		7 Field Logs (4)		
9 Add A Note														
Date	Time	User	Category	Notes								8 Edit Note	9 Email Now	Delete
03-Feb-2015	08:38:37	KATHY	INWSTK	2.2.15 An Invalid sticker was on the bin										
	00:00:00													

[AUC] 10000-Customer Maintenance [kathy]

Sending Attachment via Email

Optional: Enter Contact Name: Kathy

Optional: Enter Note: Please contact us immediately at 555-555-5555.

Optional: Enter Note:

Required: Enter Email Address: kathy@admins.com

Buttons: Lookup, OK, Cancel, Clear All

Email Note

Note has been sent

OK

The email sent will look like this.

Miscellaneous Billig Note From 00000001

kathy@admins.com

Sent: Tue 2/3/2015 9:16 AM

To: Kathy Coughlin

Cc: Kathy Coughlin

Dear Kathy,

Please contact us immediately at 555-555-5555.

2.2.15 An Invalid sticker was on the bin

Refer to Miscellaneous Billig Customer 00000001

Thank you
Kathy Coughlin

00000001,03-Feb-2015,08:38:37.18

** Do not reply to this email message as it was system generated via the ADMINS Unified Community (AUC) System **



The FROM and CC addresses are from the user who initiated the email. The email address used is from their User Profile.



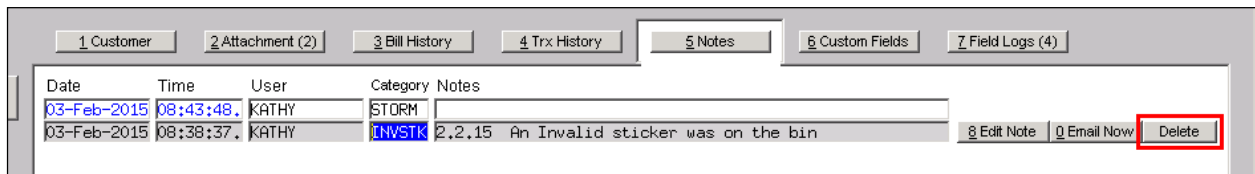
This information is from the contact name and note information entered on the prompt.



This is email body generated from the AUC system. The first line is the note entered on the screen. The second line contains the customer number. The salutation is the name in the users User Profile.

8.3. Delete a Note

If you inadvertently add a Note Line, you can delete the line. Click the **Delete** button on the highlighted line.



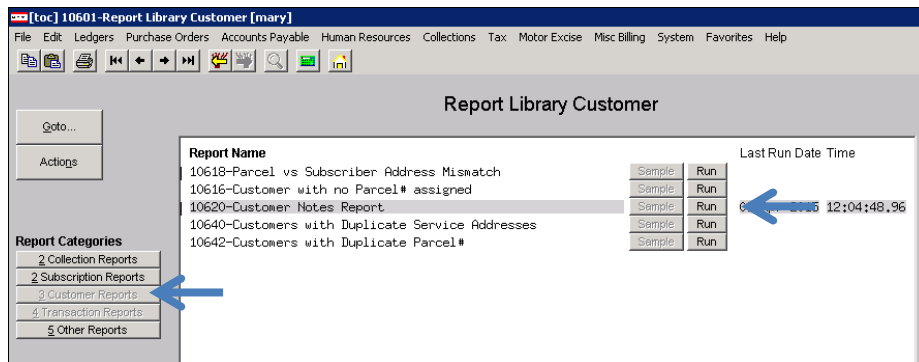
8.4. Report of Notes

The Report Library contains a report that may be printed showing all notes on file for a given customer. Or you may wish to issue a report of similar notes across all customers based on a desired Category.

Click **Misc Billing**►**Reports**►**Report Library**

Click the **CUSTOMER REPORTS** button located in the left hand navigation panel.

Click report # 16020 called **Customer Notes Report**



The output dialog box screen displays where you may limit your selections:



Task 10620: Customer Notes Report

Customer Notes Report

Optional: Enter Customer Number

Optional: Enter Note Category

Optional: Restrict to this User

Optional: Entry Date Range (mmddyyyy) From: To:

Optional: Enter Service Type

Run as Preview Print PDF Excel

If Printing use Duplex Yes No

And the report displays:

TedRE - Customer_Notes_10620_MARY(2).lis

File Edit Format Options

Courier New 9 B / U

10620-MBCUSNOTEDT.REP Printed 09-Apr-2015 at 12:34:36 by MARY Town of Concord
Customer Notes Report Page 1

Cust#	Service Address	Date	Time	User	Category	Note
00000003	383 POPE RD	09-Apr-2015	12:33:52	MARY	MISPIC	4/12/15 reported missed pickup
00000005	450 WESTFORD RD	09-Apr-2015	12:34:11	MARY	MISPIC	4/12/15 reported missed pickup

Grand Total # records : 2

Selection Legend:
Select Note Category: MISPIC

9. ABOUT CUSTOM FIELDS

These fields are used to any type of information you choose. There are several sections on this screen that allow for different types of information to be stored.

- 9 fields available for 30 Character data
- 5 fields available for 80 Character data
- 5 fields available for dates
- 5 fields available for values with 2 decimal places
- 5 fields available for values with no decimal places

Any data entered into these fields from the Customer Maintenance screen will be displayed here for reference purposes.



Customer Query

<p>Cust No 50000003</p> <p>Parcel# 1565 / 7 /</p> <p>Primary BEARER DAVID B</p> <p>Secondary BEARER AMY M</p> <p>Location 393 POPE RD</p> <p>City CONCORD St MA Zip 01742-0000</p>	<p>Service Address</p> <p>Name 1 BEARER DAVID B</p> <p>Name 2 BEARER AMY M</p> <p>Location# 393 Street# 393</p> <p>Street POPE RD Unit# </p> <p>Line 2 </p> <p>City CONCORD St MA Zip 01742-5205</p>
--	---

1 Customer
2 Attachments
3 Bill History
4 Trx History
5 Notes
6 Custom Fields
7 Field Logs (28)

<p>User Defined 30 Characters</p> <p>New Field Label multi family property</p> <p>User Defined #2 pays online</p> <p>User Defined #3</p> <p>User Defined #4</p> <p>User Defined #5</p> <p>User Defined #6</p> <p>User Defined #7</p> <p>User Defined #8</p> <p>User Defined #9</p> <p>User Defined 80 Characters</p> <p>User Defined #1</p> <p>User Defined #2</p> <p>User Defined #3</p> <p>User Defined #4</p> <p>User Defined #5</p>	<p>User Defined Dates</p> <p>User Defined #1</p> <p>User Defined #2</p> <p>User Defined #3</p> <p>User Defined #4</p> <p>User Defined #5</p> <p>User Defined Decimal 2 Places</p> <p>User Defined #1</p> <p>User Defined #2</p> <p>User Defined #3</p> <p>User Defined #4</p> <p>User Defined #5</p> <p>User Defined Decimal 0 Places</p> <p>User Defined #1</p> <p>User Defined #2</p> <p>User Defined #3</p> <p>User Defined #4</p> <p>User Defined #5</p>
---	---

10. ABOUT FIELD LOGS

This screen displays changes that have been made to the customer record in change date order. Not every field is logged but generalized changes made to a customer may be reviewed here.

Customer Maintenance - Field Logging

<p>Cust No 50000003</p> <p>Parcel# 1564 - -</p> <p>Primary</p> <p>Secondary</p> <p>Location</p> <p>City St Zip 00000-0000</p>	<p>Service Address</p> <p>Name 1 WILLIAMS KEVIN A</p> <p>Name 2 WATERMAN-WILLIAMS JACQUELINE</p> <p>Location# 394 Street# 394 Unit#</p> <p>Street POPE RD</p> <p>Line 2</p> <p>City CONCORD St MA Zip 01742-5228</p>
---	---

1 Customer
2 Attachments
3 Bill History
4 Trx History
5 Notes
6 Custom Fields
7 Field Logging

Change Date	Time	User	Field	From/To	Where Changed
18-Dec-2014	09:42	ANTHER	E-Mail Bill Chkbox		CUSTUPD
18-Dec-2014	09:42	ANTHER	Email	anthea@admins.com	CUSTUPD
02-Feb-2015	11:27	KATHY	Service Type	Enrolled in Program TOTERS Service RT5	CUSTUPD
02-Feb-2015	11:32	KATHY	Service Type	Enrolled in Program BARRELTAGS Service RT5	CUSTUPD

10.1. Edit List

While viewing the field logs for a customer, you may wish to print off a list of those changes. To do so, click the **EDIT LIST** button.



1 Customer 2 Attachments 3 Bill History 4 Trx History 5 Notes 6 Custom Fields 7 Field Logging						
8 Edit List	Change Date	Time	User	Field	From/To	Where Changed
	09-Apr-2015	11:30	MARY	Zip Code	01742-5205	CUSTUPD
	09-Apr-2015	11:30	MARY	Zip Code	01742-5205	CUSTUPD

The output dialog box screen displays where you may limit your selections:

Task 10901: Field Logging Report - Customer Maintenance

Field Logging - Customer Maintenance Edit List

Optional: Enter Customer Number

Optional: Enter Date Range From: To:

Optional: Restrict to this User

Sort: Customer# Change User Change Date

Run as Preview Print PDF Excel

If Printing use Duplex Yes No

And the report is displayed:

TedRE - MB_Customer_Changes_MARY11.xls

Printed 09-Apr-2015 at 12:28:42 by MARY

Tom of Concord

Field Logging Report - Customer Maintenance

Customer / Service Address	Change Date	Time	User	Field	Value	Where
00000003 BEAMER DAVID B 383 POPE RD	09-Apr-2015	11:30	MARY	Zip Code	Old: 01742-5205 New: 01742-5205	CUSTUPD
00000003 BEAMER DAVID B 383 POPE RD	09-Apr-2015	11:30	MARY	Zip Code	Old: 01742-5205 New: 01742-5205	CUSTUPD
00000003 BEAMER DAVID B 383 POPE RD	09-Apr-2015	11:30	MARY	Address 2	Old: . New:	CUSTUPD
00000003 BEAMER DAVID B 383 POPE RD	09-Apr-2015	11:30	MARY	Address 2	Old: BACK OF HOUSE New: .	CUSTUPD
00000003 BEAMER DAVID B 383 POPE RD	09-Apr-2015	11:30	MARY	Unit	Old: 1234 New:	CUSTUPD
00000003 BEAMER DAVID B	09-Apr-2015	11:29	MARY	Unit	Old:	CUSTUPD