



# MISCELLANEOUS BILLING

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## RELEASE NOTES – DECEMBER 2019

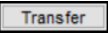
This document explains new product enhancements added to the **ADMINS** Unified Community for Windows **MISCELLANEOUS BILLING** system.

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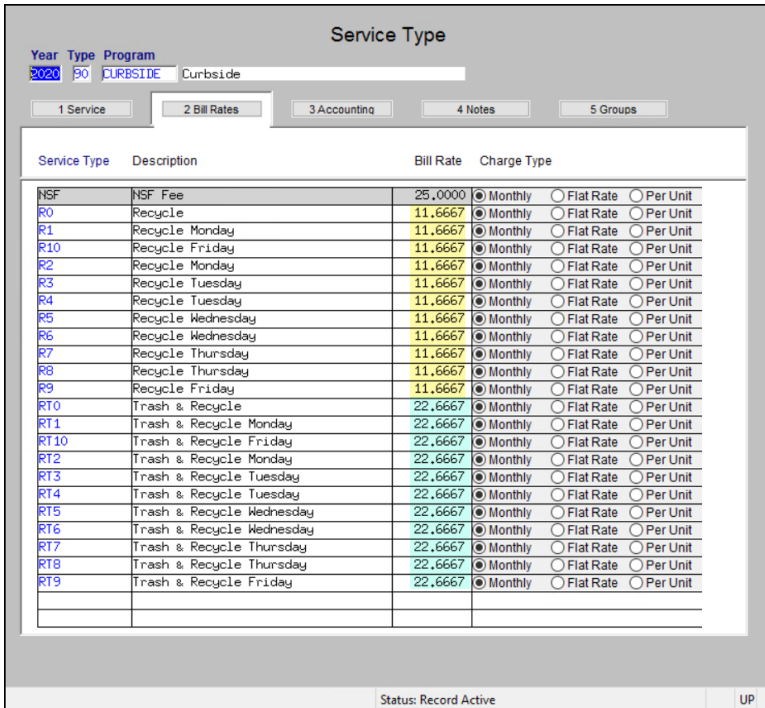


# 1 TRANSFER SERVICE TYPE [Enhancement]

There are conditions which require a change in service type. Truck routes can change over the course of time. Participants may have originally enrolled in the wrong service, requiring a correction. **ADMINS** added a  button to the **Customer Maintenance** screen to allow transferring an enrolled participant from one service type to another service type.

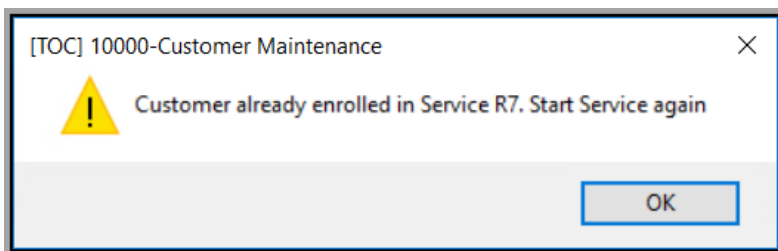
## 1.1 Rules for Transferring a Service

In the image, there are **23 Service Types** shown for the **Curbside** program. Each has a unique code, and shows a description, bill rate and charge type.



Service Type	Description	Bill Rate	Charge Type
NSF	NSF Fee	25,0000	<input checked="" type="radio"/> Monthly <input type="radio"/> Flat Rate <input type="radio"/> Per Unit
R0	Recycle	11,6667	<input checked="" type="radio"/> Monthly <input type="radio"/> Flat Rate <input type="radio"/> Per Unit
R1	Recycle Monday	11,6667	<input checked="" type="radio"/> Monthly <input type="radio"/> Flat Rate <input type="radio"/> Per Unit
R10	Recycle Friday	11,6667	<input checked="" type="radio"/> Monthly <input type="radio"/> Flat Rate <input type="radio"/> Per Unit
R2	Recycle Monday	11,6667	<input checked="" type="radio"/> Monthly <input type="radio"/> Flat Rate <input type="radio"/> Per Unit
R3	Recycle Tuesday	11,6667	<input checked="" type="radio"/> Monthly <input type="radio"/> Flat Rate <input type="radio"/> Per Unit
R4	Recycle Tuesday	11,6667	<input checked="" type="radio"/> Monthly <input type="radio"/> Flat Rate <input type="radio"/> Per Unit
R5	Recycle Wednesday	11,6667	<input checked="" type="radio"/> Monthly <input type="radio"/> Flat Rate <input type="radio"/> Per Unit
R6	Recycle Wednesday	11,6667	<input checked="" type="radio"/> Monthly <input type="radio"/> Flat Rate <input type="radio"/> Per Unit
R7	Recycle Thursday	11,6667	<input checked="" type="radio"/> Monthly <input type="radio"/> Flat Rate <input type="radio"/> Per Unit
R8	Recycle Thursday	11,6667	<input checked="" type="radio"/> Monthly <input type="radio"/> Flat Rate <input type="radio"/> Per Unit
R9	Recycle Friday	11,6667	<input checked="" type="radio"/> Monthly <input type="radio"/> Flat Rate <input type="radio"/> Per Unit
RT0	Trash & Recycle	22,6667	<input checked="" type="radio"/> Monthly <input type="radio"/> Flat Rate <input type="radio"/> Per Unit
RT1	Trash & Recycle Monday	22,6667	<input checked="" type="radio"/> Monthly <input type="radio"/> Flat Rate <input type="radio"/> Per Unit
RT10	Trash & Recycle Friday	22,6667	<input checked="" type="radio"/> Monthly <input type="radio"/> Flat Rate <input type="radio"/> Per Unit
RT2	Trash & Recycle Monday	22,6667	<input checked="" type="radio"/> Monthly <input type="radio"/> Flat Rate <input type="radio"/> Per Unit
RT3	Trash & Recycle Tuesday	22,6667	<input checked="" type="radio"/> Monthly <input type="radio"/> Flat Rate <input type="radio"/> Per Unit
RT4	Trash & Recycle Tuesday	22,6667	<input checked="" type="radio"/> Monthly <input type="radio"/> Flat Rate <input type="radio"/> Per Unit
RT5	Trash & Recycle Wednesday	22,6667	<input checked="" type="radio"/> Monthly <input type="radio"/> Flat Rate <input type="radio"/> Per Unit
RT6	Trash & Recycle Wednesday	22,6667	<input checked="" type="radio"/> Monthly <input type="radio"/> Flat Rate <input type="radio"/> Per Unit
RT7	Trash & Recycle Thursday	22,6667	<input checked="" type="radio"/> Monthly <input type="radio"/> Flat Rate <input type="radio"/> Per Unit
RT8	Trash & Recycle Thursday	22,6667	<input checked="" type="radio"/> Monthly <input type="radio"/> Flat Rate <input type="radio"/> Per Unit
RT9	Trash & Recycle Friday	22,6667	<input checked="" type="radio"/> Monthly <input type="radio"/> Flat Rate <input type="radio"/> Per Unit

- The transfer must be within the same service type. **“Trash & Recycling”** can go to another **“Trash & Recycling”** service type but cannot go to a **“Recycling”** service type – nor can a **“Recycling”** service type be transferred to a **“Trash & Recycling”** service type.
- The old and new service types must have the **same bill rate** on the service type table. In the Service Type table, there are three bill rates shown - \$25.00, \$11.6667, and 22.6667.
- **Neither** the old **nor** the new service type can **post to Accounts Receivable**. (see the **[3 Accounting]** tab of the Service Type table).
- The system will not allow a transfer to same service code. For example, RT7 may not be selected as the new service if the existing service is RT7. If the same service type code is entered, the system will display a message that the “Customer is already enrolled in Service type RT7. Start Service again”.



If any of these conditions exist, stop the old service and enroll in the new service.



## 1.2 Customer Maintenance [1 Customer] Tab

For the active subscription (that is, without a stop date), a **Transfer** button will display on the left side of the screen.

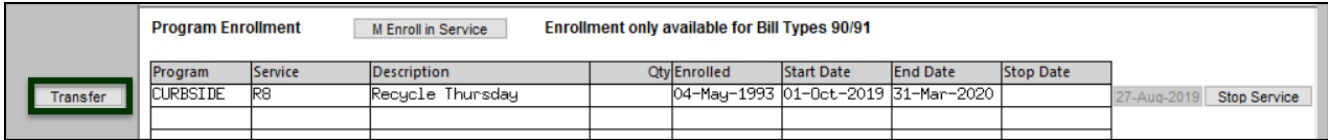


Figure 1 Transfer button on the Customer Maintenance screen

Click on the **Transfer** button to initiate a transfer.

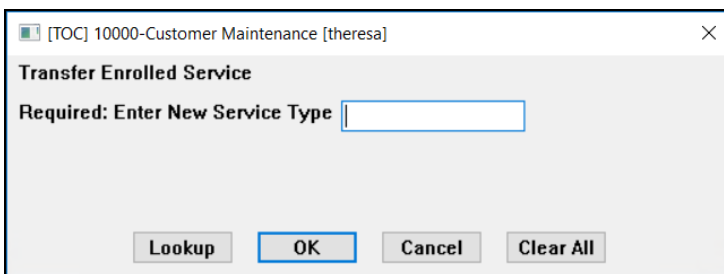


Figure 2 Prompt for the new service type

Enter the new service type; using the lookup helps to ensure that only a valid service type is selected.

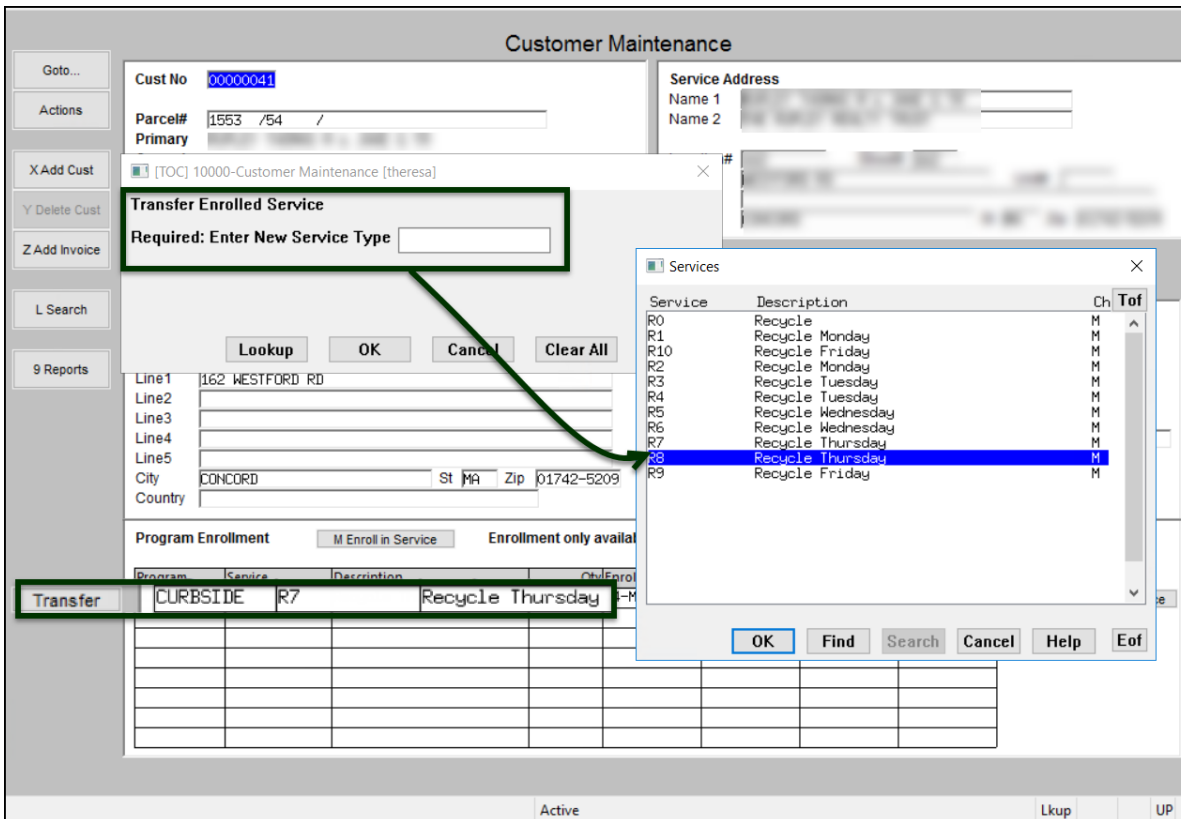


Figure 3 Customer Maintenance [Customer] tab showing the transfer button in action



### 1.3 Customer Maintenance [4 Field Logging] Tab

The system will log the change to the service type, with the most recent change listed at the top of the screen. The change date, time, user, field, values, and the source of the change are shown. Changes made via the **Transfer** button will show “CUSTUPD” for the where changed value

Change Date	Time	User	Field	From/To	Where Changed
25-Nov-2019	16:45	THERESA	Service Type	Transfer From R7 Transfer To R8	CUSTUPD
08-Nov-2018	09:32		Stop Date	Stop Date 01-Oct-2018	RECPST
01-Oct-2018	04:11		Stop Date	Stop Date cleared during Receipt Posting	
17-Oct-2017	08:46		Stop Date	Auto set Stop Service on 01-Oct-2018 Stop Date 02-Oct-2017	DLYCHK RECPST

Figure 4 The [7 Field Logging] screen shows the activity

[ADM-AUC-MB-66]

### 1.4 Customer Maintenance [3 Bill History] tab

The **3 Bill History** tab will show the new type.

Year	Program	Bill#	Charged	Paid	Refund	Adjust	Balance	Bill Date	Due Date	Type	Go To
2020	CURBSIDE	003932-01	70,00	70,00			70,00	27-Aug-2019	27-Sep-2019	R8	V Go To Bill
2019	CURBSIDE	003932-02	66,50	66,50				25-Feb-2019	27-Mar-2019	R7	
								27-Aug-2018	28-Sep-2018	R7	

Figure 5 The [3 Bill History] tab of the Customer Maintenance screen showing the Type equal to R8

Click the **V Go To Bill** button to display the **Bill Payment** screen.

#### 1.4.1 Detail Payment Inquiry

Click on the **Detail Payment** button to see the result of the transfer. The new service type will be shown in the description.

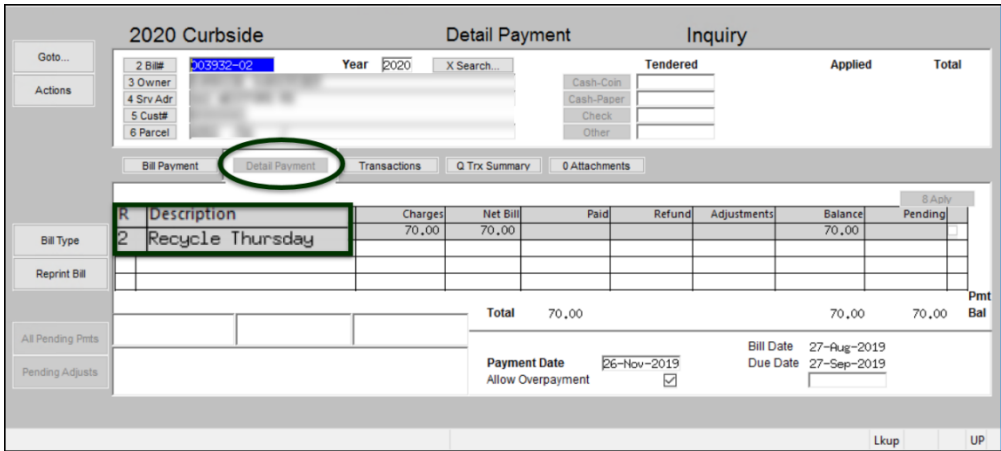


Figure 6 The Detail Payment Inquiry screen shows the new type in the description field

[ADM-AUC-MB-66]

## 2 SPECIAL INVOICE [Bug]

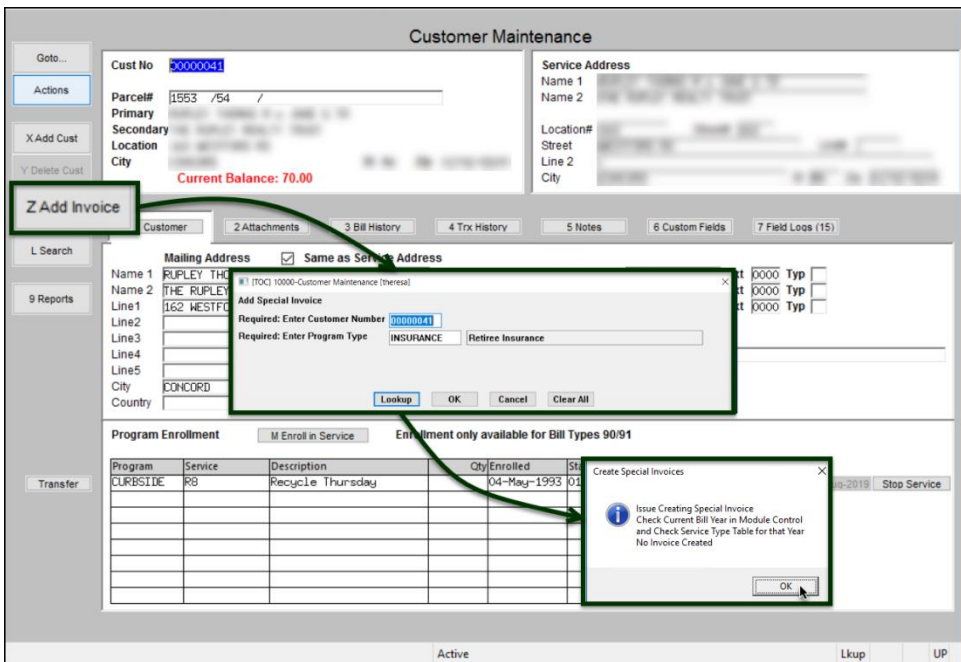


Figure 7 Special Invoice Error Popup

Z Add Invoice

A bug was fixed when creating a special invoice from the customer maintenance screen [Z Add Invoice] button.

If there is an issue creating a special invoice, a message similar to the one in **Figure 7** will be displayed. Correct the error condition (either bill year or service type table) and try again.

[ADM-AUC-MB-67]



### 3 EXCEL® REPORTS [Enhancement]

Users frequently ask for assistance to re-run an Excel® report – and provide an image or photocopy sample that was produced around the same time last year. To help [support@admins.com](mailto:support@admins.com) staff provide quicker answers, many AUC Excel® reports will now include the **report number and name** in the upper left corner of the report, similar to what is shown on reports run as **Print/Preview/PDF®**. ADMINS also now includes the **username** at the bottom right of the reports. An example is below; this information will be available on the **preview or printed report**.

13601-FADET.SUMLST.REP

Town of Admins  
Asset Summary List

Asset	Seq#	Description	Class	SubCls	Location
4	1	Level Funding July 2018	2G		TOWN
		<b>Total Asset 4</b>			
5	1	Level Funding July 2018	7G		TOWN
		<b>Total Asset 5</b>			
123	1	Vin # 1fm5k8ar2jgb58677	5G	2	TOWN
		<b>Total Asset 123</b>			
128	1	((BELLINGHAM EASEMENTS) MECHANIC, MAPLE AND SO. MAPLE ST	1G	5	TOWN

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By THERESA

[ADM-AUC-SY-8133]

### 4 HELP REFERENCE LIBRARY

The following new or updated documents were added to the Help Reference Library.

#### 4.1 New or Updated Documents

- SYSTEM MB-610 System Administration Kit [Updated]