



# REVENUE – MISCELLANEOUS BILLING

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## MB-410 CUSTOMER MAINTENANCE

This document describes the Customer Maintenance functions of the **Miscellaneous Billing Module**. To access these functions, go to **Misc. Billing ▶ Maintenance ▶ Customer Maintenance**.

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# 1. CUSTOMER

Maintain all aspects of customer information (name, address, etc.) on the [1 Customer] tab of the **Customer Maintenance** screen.

**Customer Maintenance**

Goto...

Actions

X Add Cust

Y Delete Cust

Z Add Invoice

L Search

9 Reports

Transfer

**Cust No** 30000010

**Parcel#**

**Primary**

**Secondary**

**Location**

**City**  **St**  **Zip** 00000-0000

**Service Address**

**Name 1**

**Name 2**

**Location#**  **Street#**

**Street**  **Unit#**

**Line 2**

**City**  **St**  **Zip**

1 Customer

2 PRG Invoices

3 Attachments

4 Bill History

5 Trx History

6 Notes

7 Custom Fields

8 Field Logs (7)

**Mailing Address**  **Same as Service Address**

**Name 1**

**Name 2**

**Line 1**

**Line 2**

**Line 3**

**Line 4**

**Line 5**

**City**  **St**  **Zip**

**Country**

**Phone 1**  **Ext**  **Typ**

**Phone 2**  **Ext**  **Typ**

**Phone 3**  **Ext**  **Typ**

**E-mail Bill**

**E-mail Addr**

**Program Enrollment**  **Enrollment only available for Subscription Bill Types 90/91**

Program	Service	Description	Qty	Enrolled	Start Date	End Date	Stop Date	Last Billed
CURBSIDE	RT7	Trash & Recycling 7		15-Dec-2020				

## 1.1. Search for a Customer

If the customer number is known, type in the number and press <enter>. If the customer number is not known, but the name or address is known, search for the customer number. To find a customer, click the  or button. This will present a numbered list of different search options:

- 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                      To search by the House# AND Street Name of the service address, use option # **1: By Service Location**.

Click **[Find]** to initiate a search.  
e.g., 108 BARRE yields this:

Service Address	Cust#	Na
1079 MAIN ST	00002298	107
108 BARRETT'S MILL RD	00000657	CR
108 BLUEBERRY LN	00005297	LE
108 COMMONWEALTH AV	00000552	BE
108 CRESCENT RD	00006367	FO
108 CRESCENT RD	00002681	ED

The data is organized by HOUSE# and then Street. This means that all the "100" house numbers across all streets are listed before the "101" house numbers across all streets.

By Street and Number                      To search by the STREET NAME of the Service Address and then the HOUSE#, use option # **2: By Street and Number**.

Click **[Find]** to initiate a search.  
e.g., BARRE yields this:

Street	Street#	Service Address	Cust#	Name
BARNES HILL RD	84	84 BARNES HILL RD	00001011	BRATZ
BARRETT'S MILL RD	100	100 BARRETT'S MILL RD	00000655	JEZK
BARRETT'S MILL RD	108	108 BARRETT'S MILL RD	00000657	CROZI
BARRETT'S MILL RD	111	111 BARRETT'S MILL RD	00000667	DEACH

and the data will be organized by street name and then House # within the street name.

By Customer Name                      To search by the NAME of the customer located at the Service Address, use option # **[3: By Customer 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 '00000657'. The 'Service Address' field is highlighted with a blue box and contains 'Name 1: WATKINSON, JOHN' and 'Name 2: CONNEELY, KATHERINE A'. A 'Lookup Find' dialog box is open, with 'Find Name 1 beginning with:' set to 'HOWE'. The main window displays a list of customers with columns for City, Name, Cust#, Service Address, Status, and Tol. The list includes entries for '1079 REALTY TRUST', '117 SEYMOUR STREET REALTY LLC', '152 COMMONWEALTH INC', '1586 MAIN STREET 2004 LLC', '1641 MAIN STREET LLC', '1641 MAIN STREET LLC', '204 VIRGINIA ROAD REALTY', '27 HEMLOCK, LLC', '28 JUNCTION SQUARE LLC', '315 MUSHETAQUOUD ROAD LLC', '35 LLC', and '40 BEHARRELL STREET LLC'. The 'Status' column for all entries is 'Active'. The 'Tol' column contains values like '107', 'CR', 'LE', 'BE', 'FO', 'ED', 'JEZK', 'CROZI', 'DEACH', '107', '108', '111', '107', '108', '111', '107', '108', '111', '107', '108', '111', '107', '108', '111'.



**Option**      **Description**

By Mailing Address Name      To search by the NAME of the customer based on the Mailing Address, use option # 4: **By Mailing Name**.

Click **[Find]** to initiate a search.  
e.g., HOWE yields this

Name	Cust#	Service Address
1079 REALTY TRUST	00010923	
117 SEYMOUR STREET REALTY LLC	00010924	
152 COMMONWEALTH INC	00010925	
1585 MAIN STREET 2004 LLC	00002298	1079 MAIN ST
1641 MAIN STREET LLC	00005651	117 SEYMOUR ST
1641 MAIN STREET LLC	00006375	152 COMMONWEALTH AV
1641 MAIN STREET LLC	00003499	1586 MAIN ST
204 VIRGINIA ROAD REAL	00003538	1641 MAIN ST
27 JUNILOCK LLC	00010923	1641 MAIN ST
315 JUNCTION SQUARE LES		
35 LLC		
40 BEHARRELL STREET LL		

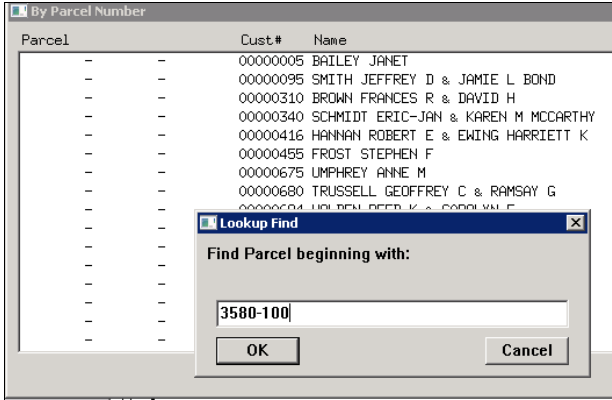
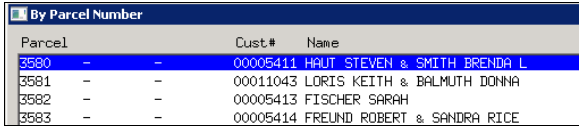
By Parcel Location      To search by the House# AND Street Name of the Parcel address, #, use option # 5: **By Parcel Location**.

Click **[Find]** to initiate a search.  
e.g., 108 BARRE yields this:

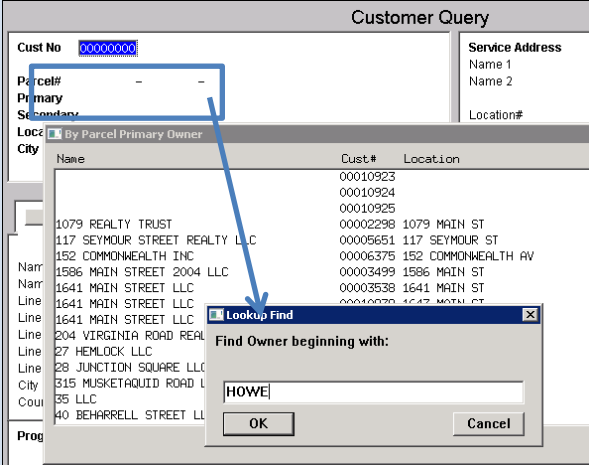
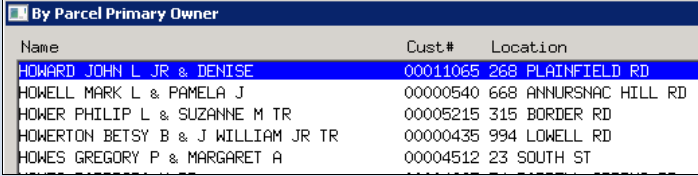
Location	Cust#	Name
ELM ST	00010923	
1 AUTUMN LN A	00010924	
1 BLUE JAY DR	00010925	
1 BLUE JAY LN	00010966	MATHES EVELYN J & ANTHONY ARTH
1 CHESTNUT ST	00004894	BOINAR KEITH E & KIMBERLY ANN
1 CHURCH GREEN	00002091	PEREIRA-DURKES CANDIDO &
1 EDMONDS RD	00010733	PEREIRA-DURKES CANDIDO &
1 EDMONDS RD	00003006	GILBERT BRIAN J & MARY P
1 FAIRHAVEN GARDENS UP	00000000	STOSHER C & DENISE
1 GREENFIELD LN		
1 LEXINGTON RD		
1 NORTH BRANCH RD		
1 PHERSANT LN A		

The data is organized by House# and then Street. This means that all the “100” house numbers across all streets are listed before the “101” house numbers across all streets.



Option	Description
By Parcel Number	<p>To search by the Map-Block-Lot of the Parcel id#, use option # <b>“6: By Parcel Number”</b>. Enter the full parcel id# or the beginning set of characters representing the desired parcel id. Be sure to enter the “-“ or “/” separators in the parcel number, as needed.</p> <p>Click <b>[Find]</b> to initiate a search. e.g., 3580-100 yields this:</p>  



Option	Description
By Parcel Primary Owner	<p>To search by the NAME of the Current Owner of the Parcel, use option # 7: <b>By Parcel Primary Owner</b>. The format of the name being searched is exactly how it is entered in the Assessor’s office. In other words, if the assessing records maintain names by LAST, FIRST or LAST FIRST or FIRST LAST, then this is how to search for the name.</p> <p>Click <b>[Find]</b> to initiate a search. e.g., HOWE yields this</p>  



Option	Description
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 option # 8: <b>By Enrolled Service</b> .

**Customer Maintenance**

Cust No: 00000007

Parcel#: 0003 -0001 -0004

Primary: This is the CURRENT Owner name

Secondary:

Location: 236 FARM ST  
City: BELLINGHAM St MA Zip: 02019-0000

Service Address:

Name 1: FEIGH LESLIE A S  
Name 2:

Location#: 236 Street#: FARM ST  
Street: FARM ST  
Line 2:  
City: BELLINGHAM

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

Mailing Address  Same as Service Address

Name 1: FEIGH LESLIE A S  
Name 2:  
Line 1: 149 SPENCER BROOK RD  
Line 2:  
Line 3:  
Line 4:  
Line 5:  
City: CONCORD St MA Zip: 01742-6226  
Country:

Phone 1: (000) 000-0000 E  
Phone 2: (000) 000-0000 E  
Phone 3: (000) 000-0000 E

E-mail Bill   
E-mail Addr:

Program Enrollment  Enroll in Service Enrollment only available for Bill Types 90/91

Program	Service	Description	Qty	Enrolled	Start Date	End Date
CURBSIDE	RT5	Trash & Recycle Thursda		01-Apr-1996	01-May-2015	31-Oct-2015

Click **[Find]** to initiate a search.  
e.g., R2 yields this

**By Enrolled Service**

Service	Program	Customer Name	Status
R1	CURBSIDE	00000396 HEDSTROM GILBERT S & MARGARET H	Activ
R1	CURBSIDE	00000500 ZENOZI MANSOUR & FRANCA MORELLI	Activ
R1	CURBSIDE	00000512 DORSEY MOIRA G & LARRY HERNANDEZ	Activ
R1	CURBSIDE	00000542 LEBLING PETER D & ROTHROCK JANET K	Activ
R1	CURBSIDE	00000578 NOVICK KIM & ELLIOTT SUSANNAH	Activ
R1	CURBSIDE	00000581 FORBES JUSTINA B & TALBOT D LOVERING	Activ
R1	CURBSIDE	00000582 FATKIN HARRY W JR & BETTY E	Activ
R1	CURBSIDE	00000611 LAMBERT BARRON P & SANDRA L	Activ
R1	CURBSIDE	00000644 FULTON DENISE M & DORRIS L	Activ
R1	CURBSIDE		Activ
R1	CURBSIDE		Activ
R1	CURBSIDE		Activ
R1	CURBSIDE		Activ
R1	CURBSIDE		Activ
R1	CURBSIDE		Activ
R1	CURBSIDE		Activ
R1	CURBSIDE		Activ

**Lookup Find**

Find Service Type beginning with:

R2

OK Cancel

**By Enrolled Service**

Service	Program	Customer Name
R1	CURBSIDE	00011208 DINAPOLI MICHAEL J & MICHAEL
R2	CURBSIDE	00000887 CUTTONO VINCENT & SANDRA
R2	CURBSIDE	00001422 ANDERSON KENNETH D & LYNN
R2	CURBSIDE	00001435 VIERSTRA BRUCE C & CATHY
R2	CURBSIDE	00001464 KILMARTIN MATTHEW & ASHLEY

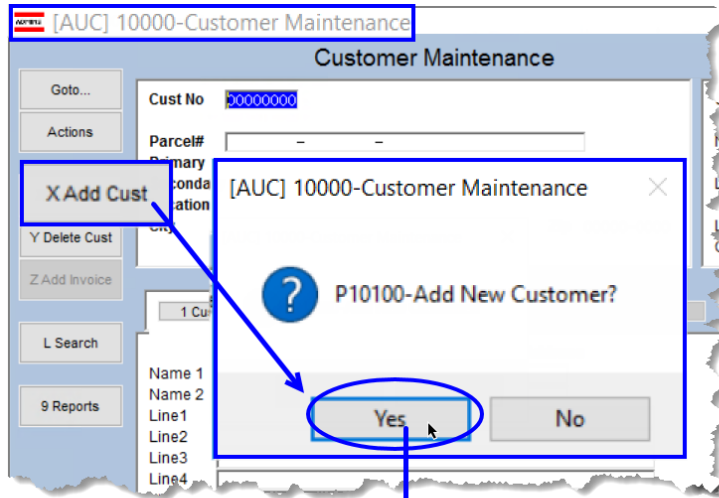


## 1.2. Add Customer



### SEARCH FOR CUSTOMER

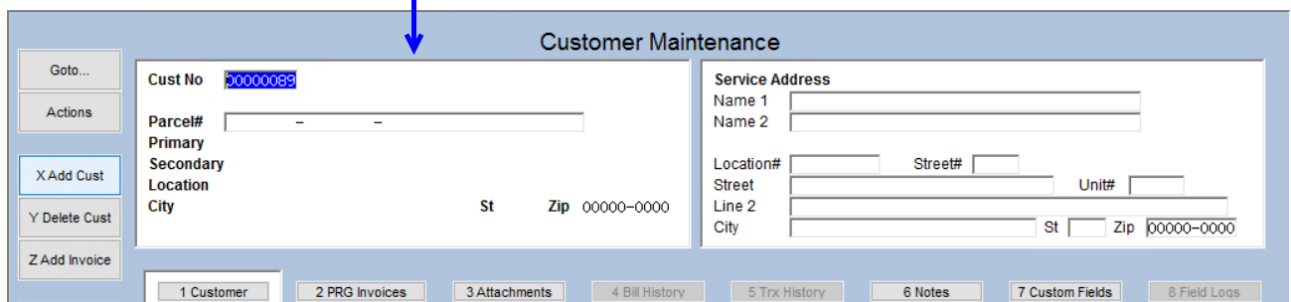
Prior to adding a new customer, to prevent duplicate Customers, search for that customer in the Customer database. See Section 1.1 for how to search for a customer.



To add new customers to the **Miscellaneous**

**Billing Module**, click the **X Add Cust** button located on the left-hand side of the screen, or click on the **[Actions]** button and choose **[Add New]**.

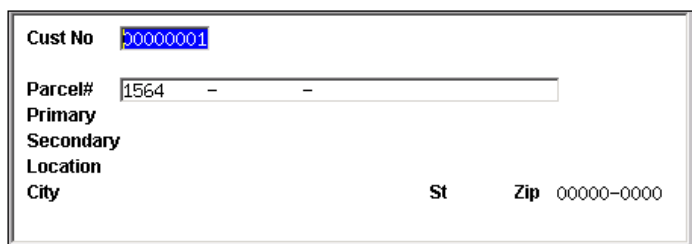
A prompt to continue will be displayed and then a blank customer screen is presented with the next sequential customer number assigned.



## 1.3. Parcel Information (optional)

To associate this service location with a parcel in the Real estate module enter the Parcel#. Once the Parcel# has been entered on a customer it will display the Current Owner of the Parcel on the screen.

Enter the parcel associated with the customer being added. This is optional and is only needed for informational purposes.







Field Label	How Used
<b>Parcel#</b>	Optionally enter a parcel# to be associated with this Service Address
<b>Primary</b>	The following fields will only display a value if the Parcel# has been entered. CURRENT OWNERS Primary name from the Real Estate Module.
<b>Secondary</b>	CURRENT OWNERS Secondary name from the Real Estate Module.
<b>Location</b>	Location address of the Parcel from the Real Estate Module

## 1.4. Service Address

Enter the Name of the customer as well as the service location including street, city, state, and zip code. For Special Invoice Customers where the Service location is not required, enter the Customers Billing address as the Service Address.

**Service Address**

Name 1

Name 2

Location#  Street#

Street  Unit#

Line 2

City  St  Zip

Field Name	How Used
<b>Name 1</b>	<b>Required:</b> Name of the Customer at this location
Name 2	Optional: 2 <sup>nd</sup> Name field
<b>Location#</b>	<b>Required:</b> House# of the Service Address. It will also set the Street# field
<b>Street</b>	<b>Required:</b> Street Name
Unit	Optional: If this is a Condo or Apartment – Enter the Unit#
Line 2	Optional: Additional address information if needed
<b>City</b>	<b>Required:</b> City
<b>State</b>	<b>Required:</b> State
<b>Zip</b>	<b>Required:</b> Zip Code



## 1.5. Mailing Address and Contact Information

Enter the mailing address and contact information for this customer. The mailing address is the address to which the invoice will be mailed.

<b>Mailing Address</b> <input checked="" type="checkbox"/> <b>Same as Service Address</b>		<b>Phone 1</b>	{000} 000-0000	Ext	0000	Typ	<input type="checkbox"/>
Name 1	WILLIAMS KEVIN A	<b>Phone 2</b>	{000} 000-0000	Ext	0000	Typ	<input type="checkbox"/>
Name 2	WATERMAN-WILLIAMS JACQUELINE	<b>Phone 3</b>	{000} 000-0000	Ext	0000	Typ	<input type="checkbox"/>
Line1	394 POPE RD	<b>E-mail Bill</b> <input checked="" type="checkbox"/>					
Line2		<b>E-mail Addr</b> anthea@admins.com					
Line3							
Line4							
Line5							
City	CONCORD	St	MA	Zip	01742-5228		
Country							

If the mailing address is the same as the service address, check the **Same as Service Address** checkbox and the service address will be brought in.

If the customer chooses, the invoices may be emailed during billing and not printed. Click the **E-mail Bill** checkbox to indicate that the invoice will be emailed and enter a valid **E-mail address**.

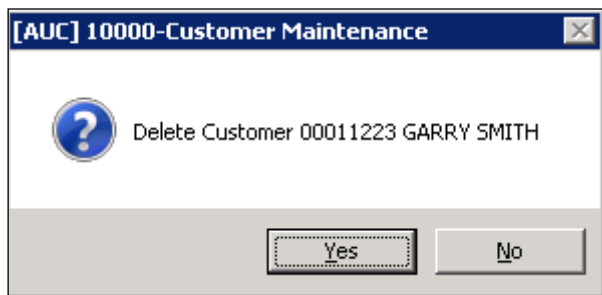
At any time, the mailing address of the Customer can be updated. If the **Same as Service Address**  checkbox is checked and the service address and mailing addresses are now different, uncheck the checkbox and enter the new mailing address.

Any further issued Bills, Bill Reprints and the Bill Inquiry screens will display the new Mailing address.

## 1.1. Delete Customer

Delete a customer from the Customer database only if that customer has not had any Bills issued against them. If any bills are associated with that Customer, then the **[Delete Cust]** button will not be available.

The Delete Customer button will display this prompt to confirm the deletion:



**Yes** Will delete the customer from the customer database.

**No** Will cancel the delete customer process

## 1.6. Add Invoice

Add special invoices to a customer from this screen. For further information about Special Invoice billing see the **MB-320 Special Invoice Billing** document in the Help Reference Library.



## 2. SUBSCRIPTION PROGRAM ENROLLMENT

This portion of the screen is used to enroll the customer in a subscription service. Program enrollment is used for Curbside and Toters services.

Program Enrollment		M Enroll in Service						
Program	Service	Description	Qty	Enrolled	Start Date	End Date	Stop Date	Last Billed
CURBSIDE	RT5	Trash & Recycle Thursda		04-May-1993	01-May-2015	31-Oct-2015		01-Apr-2015 Stop Service

Field Name	How Used
Program	Enrolled program name
Service	Which Service Type is the Customer enrolled in
Description	Service Type Description
Qty	Quantity. This is used for Toters Subscriptions to indicate the # Carts to be collected
Enrolled	Date of Enrollment
Start Date	Start Date of the Last Billed Subscription Period
End Date	End Date of the Last Billed Subscription Period
Stop Date	The Date the Service was or is to be Stopped. Service can be stopped manually via the <b>Stop Service</b> button or will be automatically stopped if the issued bill has an outstanding balance after the due date of the bill has been reached.
Last Billed	Date of the last issued bill

### 2.1. Enroll in Service

To enroll a customer in a Service Click the **Enroll in Service** button and fill in the prompts presented.



Field Name	How used
Program Type	Enter the Program Type code in which the customer wishes to enroll. For a list of all program codes click the <b>Lookup</b> button. Selected the desired program and click [OK].
Service Type	Enter the Service Type. For a list of all available service types click the <b>Lookup</b> button. This will list all Service Types available for the above entered program. Select the desired service type and click OK.
Qty	Optional: This is used for Toters programs and is the number of Carts to be collected. This quantity is used to calculate the subscription amount during the billing.
Enrollment Date	Date the Customer wishes to start the subscription service.

## 2.2. Print Bill

When a new subscriber enrolls in a service, to produce the bill on demand, click the **[Print Bill]** button corresponding to the service.

Program Enrollment									
Program	Service	Description	Qty	Enrolled	Start Date	End Date	Stop Date	Last Billed	
CURBSIDE	RT5	Trash & Recycle Thursda		02-Feb-2015				<input type="button" value="Print Bill"/>	<input type="button" value="Delete Service"/>

The following prompt will appear:

[AUC] 10000-Customer Maintenance [dimond]

**Start Enrolled Service**

Required: Enter Bill Year

Required: Enter Bill Type  Curbside

Required: Enter Billing Cycle  Curbside B Nov-Apr

Required: Enter Start Date for the Subscription Service (MMDDYYYY)

Required: Enter Due Date (mmddyyyy)

Create Next Cycle Bill in addition to this Bill  Yes  No

Field	How Used
Bill Year	Bill Year of the Billing Cycle to be billed. It will default to the Current active Bill Year.



Field	How Used
Bill Type	Bill Type. It will default to the type associated with the enrolled program.  90 – Curbside 91 - Toters
Billing Cycle	Bill Run Cycle. It will default to the Current active Billing Cycle.
Start Date of Subscription Service	Date the subscription service is to start. This date is used in the calculation of the charge for this bill.  If the subscription start date is after the start date of the subscription period set on the billing cycle table, the charge will be prorated, if the Service Type the customer is subscribed to is setup to be prorated in the Service Type Table. If the Service Type is not setup to prorate then the full subscription period charge will be billed.  The proration will use the start date entered and the end date set on the bBilling cycle table to calculate the prorated dollar amount.
Due Date of Bill	Due date of the Bill

Create Next Cycle Bill in addition to this Bill

Create a next cycle bill for this customer

Yes – This will create the next cycle bill.

If at the end of the current billing cycle, issue both a current cycle bill (2016-1) and a next cycle bill (2016-2) at the same time. Both these bills will be available to collect on at the end of this process.

No – Will only issue the bill for the entered Bill Year and Cycle.

Click **[OK]**.

Prior to printing, confirm that the correct printer is set as the default printer. The bills will display on the screen using AdmCrv.

The image shows two screenshots. The left screenshot is a window titled 'MBSI - AdmCrv' with a menu bar (File, Help) and a toolbar. A blue circle highlights a printer icon in the toolbar, and a blue arrow points from it to the right screenshot. The right screenshot is a 'Print' dialog box with a 'General' tab. It shows a list of printers: 'OneNote for Windows 10 (redirected 7)', 'SHARP Copier - MX-B401 on ADHV1', 'SHARP MX-B401 PCL6', 'SHARP MX', and 'Snagit 2021'. The 'SHARP MX-B401 PCL6' printer is selected and circled in blue. Below the printer list, there are fields for 'Status: Ready', 'Location:', and 'Comment:'. There are also options for 'Page Range' (All, Selection, Pages) and 'Number of copies: 1'. A 'Print' button is circled in blue at the bottom of the dialog.



Select the desired printer and click the **[Print]** button to render the print job. When all bills are printed and in hand, close the **AdmCrV** Viewer window by clicking **File ▶ Exit**.

### 2.3. Delete Service

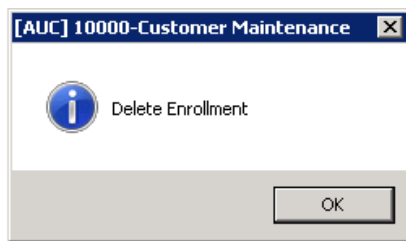
A service that was inadvertently added to a subscriber will be available for deletion only until a bill has been issued against this subscription. Once a bill has been issued against this subscription, only the STOP Service function will be available.

Click the **Delete Service** button associated with the service.

Program	Service	Description	Qty	Enrolled	Start Date	End Date	Stop Date	Last Billed
CURBSIDE	RT5	Trash & Recycle Thursda		02-Feb-2015				

Print Bill Delete Service

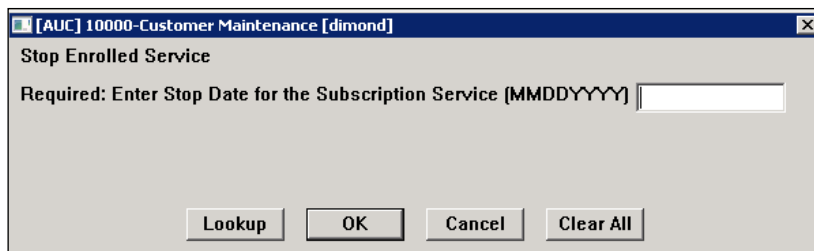
The following prompt will display.



### 2.4. Stop Service

If the customer has an active current subscription but wants to stop their service, click the **Stop Service** button.

The following dialogue box will be displayed:



Enter the date the customer wishes to stop their service. It can be today or a future date. If a future date is entered then the service will continue to be active until that date is reached.

Once the stop date is reached the stop date will automatically be set on the subscription and the customer will appear on the DROP subscription report to not receive further service.



## 2.5. Start Service

If the enrolled program has been stopped but the customer comes in and wants the service to start again there are a couple of options.

- If the customer has a Bill in the **current bill cycle** and the billed amount should be **PAID in full**, then go to the Bill Payment screen and pay the bill in Full. Once the bill payment has been posted – it will automatically remove the stop date.
- If the customer has a Bill in the **current bill cycle** and a prorated bill needs to be issued for a different amount than what is billed, then the START SERVICE process below must be run.
- If the customer does not have a bill in the current bill cycle then the START SERVICE process needs to be run.

Program Enrollment		M Enroll in Service		Enrollment only available for Bill Types 90/91					
Program	Service	Description	Qty	Enrolled	Start Date	End Date	Stop Date	Last Billed	Start Service
CURBSIDE	RT5	Trash & Recycle Thursda		04-May-1993	01-Nov-2015	30-Apr-2015	26-Apr-2015	01-Nov-2015	Start Service

If a customer has had the stop date set on their subscription, service can be started again by clicking the **Start Service** button next to the subscription.

The following dialogue box will appear:

[AUC] 10000-Customer Maintenance [dimond]

Start Enrolled Service

Required: Enter Bill Year

Required: Enter Bill Type  Curbside

Required: Enter Billing Cycle  Curbside B Nov-Apr

Required: Enter Start Date for the Subscription Service (MMDDYYYY)

Required: Enter Due Date (mmdyyyyy)

Create Next Cycle Bill in addition to this Bill  Yes  No

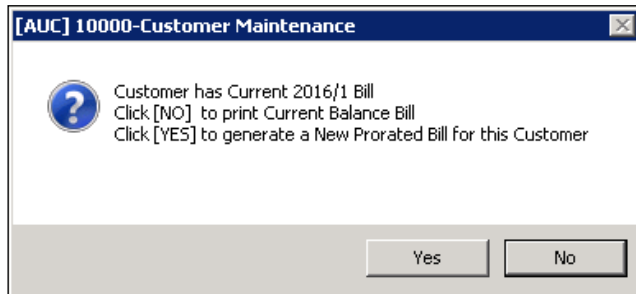
Field Name	How Used
Bill Year	Bill Year of the Billing Cycle to be billed. It will default to the Current active Bill Year.
Bill Type	Bill Type. It will default to the type associated with the enrolled program.  90 – Curbside 91 - Toters
Billing Cycle	Bill Run Cycle. It will default to the Current active Billing Cycle.



Field Name	How Used
Start Date of Subscription Service	<p>Date the subscription service is to start. This date is used in the calculation of the charge for this bill.</p> <p>If the subscription start date is after the start date of the subscription period set on the billing cycle table, the charge will be prorated if the Service Type to which the customer is subscribed is setup to prorate. If the Service Type is not setup to prorate, then the full subscription period charge will be billed.</p>
Due Date of Bill	Due date of the Bill
Create Next Cycle Bill in addition to this Bill	<p>Create a next cycle bill for this customer</p> <p>Yes – This will create the next cycle bill.</p> <p>At the end of the current billing cycle issue both a current cycle bill (2016-1) and in addition a next cycle bill (2016-2). Both these bills will be available to collect on at the end of this process.</p> <p>No – Will only issue the bill for which the Bill Year and Cycle were entered.</p>

Click **OK**

If the Customer already has a bill for the cycle entered in the above dialogue box, the following message will appear



- No** Will create a bill print of the Current Bill issued to this customer showing unpaid balances
- Yes** Will cancel the current bill issued to this customer and issue a NEW bill with new calculated charge amount based on the Start date entered and the end of the subscription period.

A Billing Register report will be displayed on the screen







## 2.6. Transfer Service

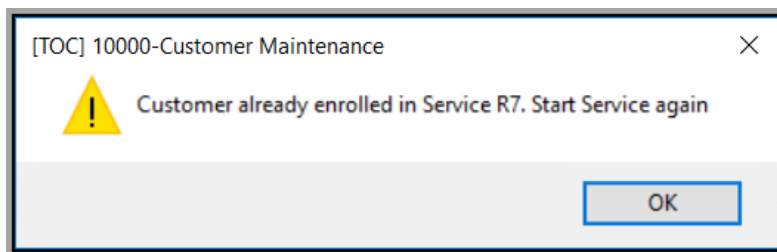
There are conditions which require a change in service type. Truck routes can change over the course of time. Participants may have originally enrolled in the wrong service, requiring a correction.

### 2.6.1. 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
RT10	Trash & Recycle Monday	22,6667	<input checked="" type="radio"/> Monthly <input type="radio"/> Flat Rate <input type="radio"/> Per Unit
RT1	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

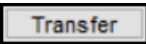
- The transfer must be within the same service type. “Trash & Recycling” can go to another “Trash & Recycling” service type but cannot go to a “Recycling” service type – nor can a “Recycling” service type be transferred to a “Trash & Recycling” service type.
- The old and new service types must have 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.

### 2.6.2. Transfer the Service

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



Program Enrollment		M Enroll in Service		Enrollment only available for Bill Types 90/91			
Program	Service	Description	Qty	Enrolled	Start Date	End Date	Stop Date
CURBSIDE	R8	Recycle Thursday		04-May-1993	01-Oct-2019	31-Mar-2020	27-Aug-2019
							Stop Service

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

[TOC] 10000-Customer Maintenance [theresa]

**Transfer Enrolled Service**

Required: Enter New Service Type

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

**Customer Maintenance**

Goto... Cust No **00000041**

Parcel# **1553 /54 /**

Primary

Service Address  
Name 1  
Name 2

[TOC] 10000-Customer Maintenance [theresa]

**Transfer Enrolled Service**

Required: Enter New Service Type

Line1 162 WESTFORD RD

Line2

Line3

Line4

Line5

City CONCORD St MA Zip 01742-5209

Country

Program Enrollment  M Enroll in Service Enrollment only availa

Program	Service	Description	Qty	Enrolled	Start Date	End Date	Stop Date
CURBSIDE	R7	Recycle Thursday					

**Transfer**

**Services**

Service	Description	Ch	Tot
R0	Recycle	M	
R1	Recycle Monday	M	
R10	Recycle Friday	M	
R2	Recycle Monday	M	
R3	Recycle Tuesday	M	
R4	Recycle Tuesday	M	
R5	Recycle Wednesday	M	
R6	Recycle Wednesday	M	
R7	Recycle Thursday	M	
R8	Recycle Thursday	M	
R9	Recycle Friday	M	



### 3. RECURRING PROGRAM INVOICES [PRG INVOICE]

Sometimes special invoices recur on a regular basis. This screen gives the ability to assign a **Program Type** to a customer and specify the frequency of the recurring invoice. A customer can have multiple Programs assigned.



**NOTE** only programs setup as Special Invoices type 95 will be available to be added

**Customer Maintenance - Program Invoices**

Goto...  
Actions

T Add Program  
Q Program List

Cust No: 00000005

Parcel#: - -

Primary  
Secondary  
Location  
City

St      Zip 00000-0000

Current Balance: 4,800.08

Service Address

Name 1  
Name 2

Location# 60      Street# 60      Unit#

Street  
Line 2  
City

St MA      Zip -0000

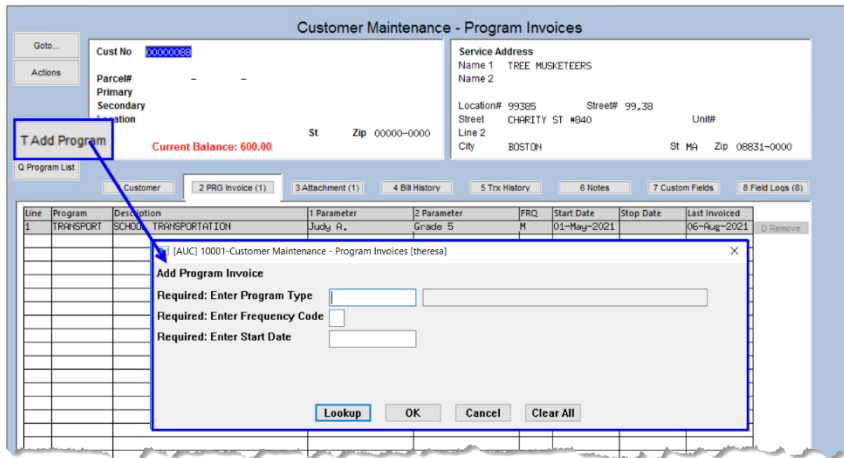
1 Customer
2 PRG Invoice (2)
3 Attachment (19)
4 Bill History
5 Trx History
6 Notes
7 Custom Fields
8 Field Loqs (28)

Line	Program	Description	1 Parameter	2 Parameter	FRQ	Start Date	Stop Date	Last Invoiced	
1	SCHTUITKMA	KMA TUITIONS	Peter J	10	M	01-Jul-2020		06-Aug-2021	D Remove
2	SCHTUITKMA	KMA TUITIONS	John S	6	M	01-Jul-2020		06-Aug-2021	

Column Label	How Used
Line	Sequential number for added Programs
Program	Program Type
Description	Description of Program Type
1 Parameter	Enter up to 40 characters
2 Parameter	Enter up to 40 characters
FRQ	Frequency of recurring Invoice. This can be changed anytime. Use Lookup to see available frequencies.
Start Date	Start Date of recurring invoice. No invoice will be issued for this customer prior to this date
Stop Date	Stop Date. No Invoices will be issued to the Customer after this date.
Last Invoiced	Date the invoice was last issued



### 3.1. Add Program

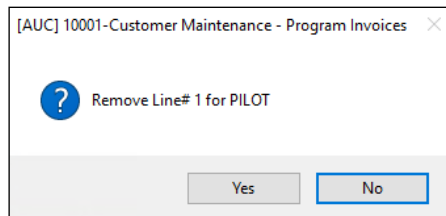


To add a program to a customer, click the **[Add Program]** button:

Field Name	How Used
Program Type	Enter the <b>Program Type</b> to add to Customer. Use the Lookup button to see a list of all program types
Frequency Code	Enter the frequency of occurrence.
Start Date	Start Date of this Program for the Customer

### 3.2. Remove Program

If a Program was added to a customer by mistake or the Customer should not receive this invoice anymore, then click the **[Remove]** button. However, once a customer has been issued an invoice, the remove button will no longer be available. Set the Stop Date instead to prevent any further invoices from being issued to the customer



- Yes** Remove Program from Customer
- No** Cancel Remove



### 3.3. Program List

Task 10113: Customer Assigned Programs for Invoicing

**Customers Assigned Programs for Invoicing**

Optional: Enter Customer Number

Optional: Enter Department Group

Optional: Enter Program Type

Run as  Preview  Print  PDF  Excel

If Printing use Duplex  Yes  No

10113-MBCUSPRGLST.REP Printed 05-Aug-2021 at 12:53:33 by ANTHEA City of ADMINS Page 1  
Customer Assigned Programs for Invoicing

---

Customer# : 00000005  
Name 1 : FRAMINGHAM PUBLIC SCHOOLS  
Address : 73 MT WAYTE AVENUE, STE. 2

---

Line	Program	Description	1-Parameter	2-Parameter	Frequency	Start Date	End Date	Last-Invoiced	Next-Invoice
1	SCHTUITKMA	KMA TUITIONS	Peter J	10	Quarterly	01-Jul-2020		24-Jun-2021	24-Sep-2021
2	SCHTUITKMA	KMA TUITIONS	John S	6	Quarterly	01-Jul-2020		24-Jun-2021	24-Sep-2021



**NOTE – the next invoice date is an approximate date calculated using the last invoice date and the frequency of the program assigned to the customer; if the last invoice date has not been set it will use the start date and calculate forward from there**

### 4. ATTACHMENTS

When a bill is created an attachment can be created of that bill. This option is controlled by the setting in:

**Miscellaneous Billing ▶ Module Maintenance ▶ Miscellaneous Billing Module Control**

Set sequence #11006 to “Y” to attach original bill (PDF® images) to the customer record.

Misc Billing Module Control

Seq#	Description	Answer	Buttons
4006	Allow Duplicate Batch codes for Different Users (Y/N)	N	1 Edit
4007	Add a Seq# to Duplicate Batches to make them unique (Y/N)	N	
4009	Billing Year (RE/PP/MW)	2022	
4011	Assign Batch# by Computer or Both Manual and Computer (C/B)	B	
4031	Date Used For Posting to Ledger – Transaction Date or Deposit	F	
4032	Set Flag For Users Batches on Posting Selection Screen.	Y	
4040	Transfer Batch to Supervisor during Submit Batch process	N	
4041	Batch Supervisor to receive batch		
4070	[Refunds] Generate [V]ouchers in RP or [E]xternal Download Fl	V	
4105	RE/PP/MB Escrow/Print/Online Service File Location	d:\auc_development\ad\home\transfer	
8001	Municipal Code (MV/RE/PP/MB) [e.g., 123]	123	
11001	MB Bill Year	2022	
11002	Default Bank Code	ERST	
11003	Default directory for CRSS Import Files	d:\auc_development\ad\home\transfer	
11004	Ignore Subscription Balances below this amount for Drops	1.00	
11006	Attach Original Bills (Y/N)	Y	
11007	Attach Bill Reprints	N	
11009	On-demand bill date days prior to today (eg: 0-10)	1	
11010	CRSS processing for MB billing (Y/N)	N	
11011	Days passed due before DROPPING subscription	30	
11020	Reset Billing Print Sequence Number (Y/N)	Y	
11025	MB Billing Intermediate File	doc_agt\mbod\mbbill_odbc_<l_usrnam>.pdf	
11026	MB Special Invoices Intermediate File	doc_agt\mbod\mbspc_odbc_<l_usrnam>.pdf	
11030	Bill Reprint Intermediate File Location	doc_agt\mbod\l_<l_bt>_<l_bn>_<l_dt>.pdf	
11031	Batch Reprint Intermediate File Location	doc_agt\mbod\bstreprint_<l_usrnam>.pdf	

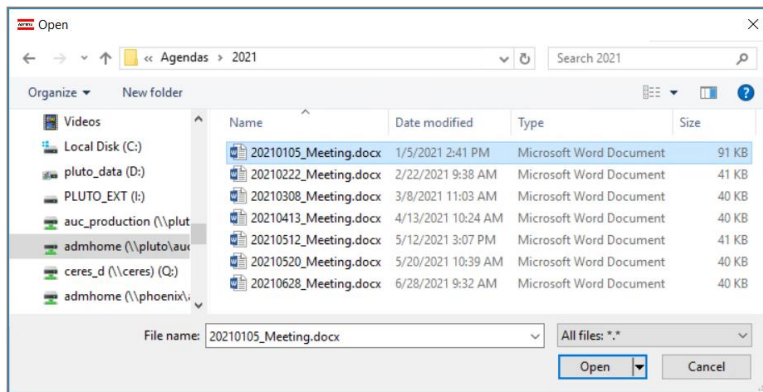
Status: Active



If any attachments are present the number of attachments is shown in parenthesis (in a “badge”) on the tab. In the example shown above, a (3) appears on the tab indicating there are three attachments on this customer record. An attachment placed on a record by the system cannot be deleted. Supporting documents manually attached by a user may be deleted.

## 4.1. Add Attachment

As desired, attach other documents to the customer record such as correspondence. 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; find and choose the document to be attached.



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



**To ensure that attachments remain available, use only network drives specified by the local IT department. If in doubt, ask ADMINS, Inc. for assistance.**



**Customer Maintenance**

<p>Cust No <input type="text" value="00000005"/></p> <p>Parcel# - -</p> <p>Primary</p> <p>Secondary</p> <p>Location</p> <p>City <input type="text"/> St <input type="text"/> Zip 00000-0000</p> <p style="color: red; font-weight: bold;">Current Balance: 4,800.08</p>	<p><b>Service Address</b></p> <p>Name 1 <input type="text"/></p> <p>Name 2 <input type="text"/></p> <p>Location# 60 Street# 60 Unit#</p> <p>Street <input type="text"/></p> <p>Line 2 <input type="text"/></p> <p>City <input type="text"/> St MA Zip <input type="text"/></p>
---	--

1 Customer    2 PRG Invoice (2)    **3 Attachment (4)**    4 Bill History    5 Trx History    6 Notes    7 Custom Fields    8 Field Logs (28)

Seq#	Description	Filename	Buttons
1	Original SCHATUITKMA Special Invoice Prin	MBSI_2021SCHTUITKMA00010300.PDF	
2	Original SCHATUITKMA Special Invoice Prin	MBSI_2022SCHTUITKMA00013500.PDF	
3	Original SCHATUITKMA Special Invoice Prin	MBSI_2022SCHTUITKMA00013600.PDF	
4	User Supplied Attachment on shared drive	20210105_Meeting.docx	V View    Z Email    D Remove

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 **[V View]** button on the right side of the screen. The document will be displayed.

1 Customer    2 PRG Invoice (2)    **3 Attachment (4)**    4 Bill History    5 Trx History    6 Notes    7 Custom Fields    8 Field Logs (28)

Seq#	Description	Filename	Buttons
1	Original SCHATUITKMA Special Invoice Prin	MBSI_2021SCHTUITKMA00010300.PDF	
2	Original SCHATUITKMA Special Invoice Prin	MBSI_2022SCHTUITKMA00013500.PDF	
3	Original SCHATUITKMA Special Invoice Prin	MBSI_2022SCHTUITKMA00013600.PDF	
4	User Supplied Attachment on shared drive	20210105_Meeting.docx	V View    Z Email    D Remove

## 4.3. Email Attachment

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





Seq#	Description	Filename	Buttons
1	Original SCHTUITKMA Special Invoice Prin	MBSI_2021SCHTUITKMA00010300.PDF	
2	Original SCHTUITKMA Special Invoice Prin	MBSI_2022SCHTUITKMA00013500.PDF	
3	Original SCHTUITKMA Special Invoice Prin	MBSI_2022SCHTUITKMA00013600.PDF	
4	User Supplied Attachment on shared drive	20210105_Meeting.docx	V View Z Email D Remove

[AUC] 10000-Customer Maintenance [theresa]

**Sending Attachment via Email**

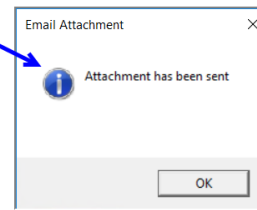
Optional: Enter Contact Name:

Optional: Enter Note:

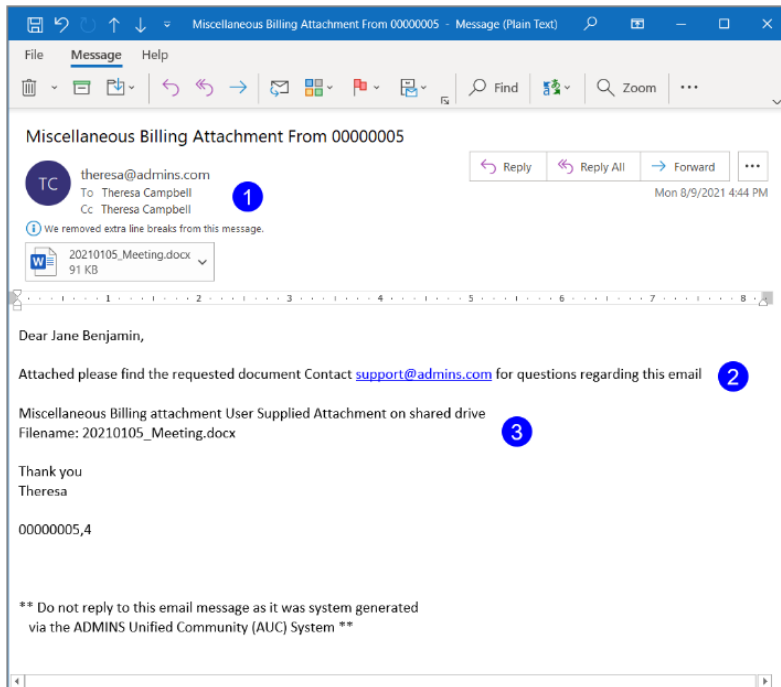
Optional: Enter Note:

Required: Enter Email Address:

Buttons: Lookup, OK, Cancel, Clear All



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 email body is 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 Complimentary Close/Signature is the name in the sending user's 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.



1 Customer		2 PRG Invoice (2)		3 Attachment (4)		4 Bill History		5 Trx History		6 Notes		7 Custom Fields		8 Field Logs (28)	
Seq#	Description	Filename	Buttons												
1	Original SCHTUITKMA Special Invoice Prin	MBSI_2021SCHTUITKMA00010300.PDF													
2	Original SCHTUITKMA Special Invoice Prin	MBSI_2022SCHTUITKMA00013500.PDF													
3	Original SCHTUITKMA Special Invoice Prin	MBSI_2022SCHTUITKMA00013600.PDF													
4	User Supplied Attachment on shared drive	20210105_Meeting.docx	V View	Z Email	D Remove										

This button will only appear on attachments that were not added by the system. For example, in the screen capture shown in Figure 1, 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	Buttons										
1	Original FY 2016 Run 1 Bill Print	MBBILL_2016CURBSIDE00488101.PDF	V View Z Email										
2	Letter to Customer 0000001 2/2/15	Cust00000001_02-02-15_Letter.docx											

Figure 1 System-supplied attachments cannot be removed by the user

## 5. BILL HISTORY

**Customer Maintenance - Bill History**

**Cust No** 00000003

**Parcel#** 1

**Primary** 0

**Secondary**

**Location** 3

**City** 0

**Service Address**

Name 1

Name 2

Location#

Street

Line 2

City

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

Year	Program	Bill#	Charged	Paid	Refund	Adjust	Balance	Bill Date	Due Date	Type	Go To
2022	CURBSIDE	001605-01	161.00	161.00				25-Feb-2021	31-Mar-2021	R17	V Go To Bill
2021	CURBSIDE	001605-02	141.00	141.00				25-Aug-2020	25-Sep-2020	R17	
2021	CURBSIDE	001605-01	141.00	141.00				01-Mar-2020	30-Mar-2020	R17	
2020	CURBSIDE	001605-02	136.00	136.00				27-Aug-2019	27-Sep-2019	R17	
2020	CURBSIDE	001605-01	136.00	136.00				25-Feb-2019	27-Mar-2019	R17	
2019	CURBSIDE	001605-02	131.00	131.00				27-Aug-2018	28-Sep-2018	R17	
2019	CURBSIDE	001605-01	131.00	131.00				26-Feb-2018	27-Mar-2018	R17	
2018	CURBSIDE	001605-02	125.00	125.00				28-Aug-2017	29-Sep-2017	R17	
2018	CURBSIDE	001605-01	125.00	125.00				28-Feb-2017	27-Mar-2017	R17	
2017	CURBSIDE	001605-02	121.00	121.00				29-Aug-2016	30-Sep-2016	R17	
2017	CURBSIDE	001605-01	121.00	121.00				29-Feb-2016	25-Mar-2016	R17	
2016	CURBSIDE	001605-02	115.00	115.00				18-Aug-2015	01-Oct-2015	R17	
2016	CURBSIDE	001605-01	95.83	95.83				23-Mar-2015	24-Apr-2015	R17	
2015	CURBSIDE	001605-02	110.00	110.00				01-Nov-2014	01-Dec-2014	R17	
2015	CURBSIDE	001605-01	110.00	110.00				01-May-2014	31-May-2014	R17	
2014	CURBSIDE	001607-01	105.00	105.00				01-May-2013	31-May-2013	R17	
2014	CURBSIDE	001605-02	105.00	105.00				01-Nov-2013	01-Dec-2013	R17	
2013	CURBSIDE	001608-02	100.00	100.00				01-Nov-2012	01-Dec-2012	R17	
2013	CURBSIDE	001604-01	100.00	100.00				01-May-2012	31-May-2012	R17	
2012	CURBSIDE	001617-02	95.00	95.00				01-Nov-2011	01-Dec-2011	R17	
2012	CURBSIDE	001606-01	95.00	95.00				01-May-2011	31-May-2011	R17	

More
⏪ ⏩

This screen will display all the bills that have been generated for this customer. To access this screen, click on the **Bill History** button.

If there are more pages of bills, "More" will display in the lower left hand corner of the screen. Use the black arrow keys or **[Page Up]** and **[Page Down]** to display the bills.



Year	Program	Bill#	Charged	Paid	Refund	Adjust	Balance	Bill Date	Due Date	Type	Go To
2022	SCHULTKRM	000136-00	483.34				483.34	06-Aug-2021	15-Aug-2021		
2022	SCHULTKRM	000135-00	483.34				483.34	06-Aug-2021	15-Aug-2021		
2021	SCHULTKRM	000103-00	2,416.70				2,416.70	24-Jun-2021			
2021	SCHULTKRM	000102-00	2,416.70	1,000.00			1,416.70	24-Jun-2021			V Go To Bill

2021 Misc Billing Bill Payment Inquiry

2 Bill# 000102-00 Year 2021 X Search...

3 Owner FRAMINGHAM PUBLIC SCHOOLS

4 Srv Adr 60 HARPIN STREET

5 Cust# 00000005

6 Parcel

Tendered Cash Back Applied Total

Cash-Coin

Cash-Paper

Check

Other

Bill Payment Detail Payment Transactions Q Trx Summary 0 Attachment (1) Soc Inv Text

Run	Charges	Net Bill	Paid	Refund	Adjustments	Balance	B Aply	Pending
KRM TUITIONS	2416,70	2416,70	1000,00			1416,70		500,00
<b>Bill Totals</b>	2416,70	2416,70	1000,00			1416,70		916,70 Bal

Service Address Current Mailing Address

Payment Date 09-Aug-2021 Amount Due \$ 1,416.70

Allow Overpayment

Payment Pending by ANTHEA

“Drill down” to the Bill Payment screen for a particular bill by selecting the desired bill and clicking the [Y Go to Bill] button located on the right.

### 5.1. History List

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

The following prompt will appear:

**Customer Bill History Summary**

Optional: Enter Bill Year Range First Year:  Last Year:

Optional: Enter Program Type

Run as  Preview  Print  PDF  Excel

If Printing use Duplex  Yes  No



**Customer Maintenance - Bill History**

**Cust No** 00000003

**Parcel#** 1  
**Primary** 0  
**Secondary**  
**Location** 3  
**City** 0

**Service Address**

Name 1  
Name 2  
Location#  
Street  
Line 2  
City

9 History List

0 Email History

Q Statement

More

Year	Program	Bill#	Charged	Paid	Refund	Adjust	Balance	Bill Date	Due Date	Type	Go To
2022	CURBSIDE	001605-01	161.00	161.00				25-Feb-2021	31-Mar-2021	RT7	Go To Bill
2021	CURBSIDE	001605-02	141.00	141.00				25-Aug-2020	25-Sep-2020	RT7	
2021	CURBSIDE	001605-01	141.00	141.00				01-Mar-2020	30-Mar-2020	RT7	
2020	CURBSIDE	001605-02	136.00	136.00				27-Aug-2019	27-Sep-2019	RT7	
2020	CURBSIDE	001605-01	136.00	136.00				25-Feb-2019	27-Mar-2019	RT7	

Printed 09-Aug-2021 at 17:17:54 by MUPDEV5 Page 1

**Customer Bill History Summary**

Customer#: 00000003  
Owner: CURBSIDE SUBSCRIBER  
Service Address:   
as of 17:17:54 on 09-Aug-2021

Year	Bill#	Program	Charges	Adjustments	Refunds	Payments	Balance
2022	001605-01	Curbside	161.00	.00	.00	161.00	.00
2021	001605-02	Curbside	141.00	.00	.00	141.00	.00
2021	001605-01	Curbside	141.00	.00	.00	141.00	.00
2020	001605-02	Curbside	136.00	.00	.00	136.00	.00
2020	001605-01	Curbside	136.00	.00	.00	136.00	.00
2019	001605-02	Curbside	131.00	.00	.00	131.00	.00
2019	001605-01	Curbside	131.00	.00	.00	131.00	.00
2018	001605-02	Curbside	125.00	.00	.00	125.00	.00
2018	001605-01	Curbside	125.00	.00	.00	125.00	.00
2017	001605-02	Curbside	121.00	.00	.00	121.00	.00
2017	001605-01	Curbside	121.00	.00	.00	121.00	.00
2016	001605-02	Curbside	115.00	.00	.00	115.00	.00
2016	001605-01	Curbside	95.83	.00	.00	95.83	.00
2015	001605-02	Curbside	110.00	.00	.00	110.00	.00
2015	001605-01	Curbside	110.00	.00	.00	110.00	.00
2014	001607-01	Curbside	105.00	.00	.00	105.00	.00
2014	001605-02	Curbside	105.00	.00	.00	105.00	.00
2013	001608-02	Curbside	100.00	.00	.00	100.00	.00
2013	001604-01	Curbside	100.00	.00	.00	100.00	.00
2012	001617-02	Curbside	95.00	.00	.00	95.00	.00
2012	001606-01	Curbside	95.00	.00	.00	95.00	.00
2011	001601-02	Curbside	92.00	.00	.00	92.00	.00
2011	001599-01	Curbside	92.00	.00	.00	92.00	.00
2010	001615-01	Curbside	85.00	.00	.00	85.00	.00
2010	001613-02	Curbside	87.00	.00	.00	87.00	.00
2009	001623-02	Curbside	72.00	.00	.00	72.00	.00
2009	001623-01	Curbside	220.00	(148.00)	.00	72.00	.00

## 6. TRANSACTION HISTORY

The transaction history screen displays all the transactions that have taken place with the customer. This screen is presented in **Year** order, with the most recent transactions at the top.



Goto...

Actions

**Cust No** 30000001

**Parcel#** 1564 - -

**Primary 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)

History List

Summary List

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
2015	000000-00	2015-91-TOTERS-RT5	02-Feb-2015				DELETE SUBSCRIPTION SERVICE
2015	000000-00	2015-95-BARRELTAGS-RT	02-Feb-2015				DELETE SUBSCRIPTION SERVICE
2014	004872-02	2-Trash & Recycle	Thu 25-Mar-2013	105.00			Billing
2014	004882-01	1-Trash & Recycle	Thu 26-Sep-2013	105.00			Billing
2013	004872-02	2-Trash & Recycle	Thu 23-Mar-2012	100.00			Billing
2013	004878-01	1-Trash & Recycle	Thu 20-Sep-2012	100.00			Billing
2012	004852-02	2-Trash & Recycle	Thu 25-Mar-2011	95.00			Billing
2012	004889-01	1-Trash & Recycle	Thu 23-Sep-2011	95.00			Billing
2011	004828-02	2-Trash & Recycle	Thu 26-Mar-2010	92.00			Billing
2011	004854-01	1-Trash & Recycle	Thu 24-Sep-2010	92.00			Billing
2010	001030-02	2-Trash & Recycle	Thu 19-Mar-2009	87.00			Billing
2010	004850-01	1-Trash & Recycle	Thu 24-Sep-2009	87.00			Billing
2009	001034-01	1-Trash & Recycle	Thu 28-Aug-2008	79.00			Billing
2009	001038-02	2-Trash & Recycle	Thu 07-Mar-2008	74.00			Billing
2009	001038-02	2-Trash & Recycle	Thu 07-Mar-2008	74.00			Billing
2009	001038-02	2-Trash & Recycle	Thu 07-Mar-2008	74.00			Billing
2009	001038-02	2-Trash & Recycle	Thu 07-Mar-2008	74.00		5.00	Abatement
2008	001037-01	1-Trash & Recycle	Thu 10-Sep-2007	74.00			Billing

More

If more than one page of transactions is available, "More" will be displayed in the bottom left hand corner of the screen. Use the black arrow keys or [Page Up] and [Page Down] to move between pages.

### 6.1. Additional Display Options

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

Year	Bill#	Description	Trx Date	Charges	Payments	Other	Display - Tran Code Desc.
2022	001605-01	1-Trash & Recycle	Thu 17-Mar-2021		161.00		MB - UNIBANK
2022	001605-01	1-Trash & Recycle	Thu 25-Feb-2021	161.00			BILL
2021	001605-02	2-Trash & Recycle	Thu 04-Sep-2020		141.00		MB - UNIBANK
2021	001605-02	2-Trash & Recycle	Thu 25-Aug-2020	141.00			BILL

The Display button over the last column on the screen is used to display additional options on the screen. Click the button to select from the available options for display on the screen.

Year	Bill#	Description	Trx Date	Charges	Payments	Other	Display - Deposit Date
2022	001605-01	1-Trash & Recycle	Thu 17-Mar-2021		161.00		18-Mar-2021
2022	001605-01	1-Trash & Recycle	Thu 25-Feb-2021	161.00			25-Feb-2021
2021	001605-02	2-Trash & Recycle	Thu 04-Sep-2020		141.00		08-Sep-2020
2021	001605-02	2-Trash & Recycle	Thu 25-Aug-2020	141.00			25-Aug-2020

- Display - Transaction #
- Display - Tran Code Desc.
- Display - Receipt #
- Display - Check #
- Display - Check Name
- Display - Check Amount
- Display - Cash Amount
- Display - Other Amount
- Display - Check Date
- Display - Batch #
- Display - Revenue Date
- Display - Deposit Date
- Display - User
- Display - GL Batch
- Display - GL Code
- Display - GL Ref#/Vou#
- Display - Vendor
- Display - Voucher Date
- Display - Transaction Desc
- Display - Entry Date
- Display - Post Date
- Display - Voucher



## 6.2. History List

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

Optionally select a Bill Year Range and/or a Program Type to drill down on the content or leave the prompts blank and display all.

```

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

Year: 2016
Customer#: 00000001           Transactions posted on this account
Owner: CURBSIDE SUBSCRIBER   as of 08:15:28 on 03-Feb-2015
Subscription: 01-May-2015 to 31-Oct-2015
Service Address: 394 POPE RD
Parcel: 1564--
=====
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           Transactions posted on this account
Owner: WILLIAMS KEVIN A     as of 08:15:28 on 03-Feb-2015
Subscription: 01-May-2014 to
Service Address: 394 POPE RD
Parcel: 1564--
=====
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
=====

```

## 6.3. Summary List

The Summary List displays the bill history transactions for the customer 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

Optionally select a Bill Year Range and/or a Program Type to drill down on the content or leave the prompts blank and display all.

10671-MBTRNHISUM.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	



## 7. NOTES

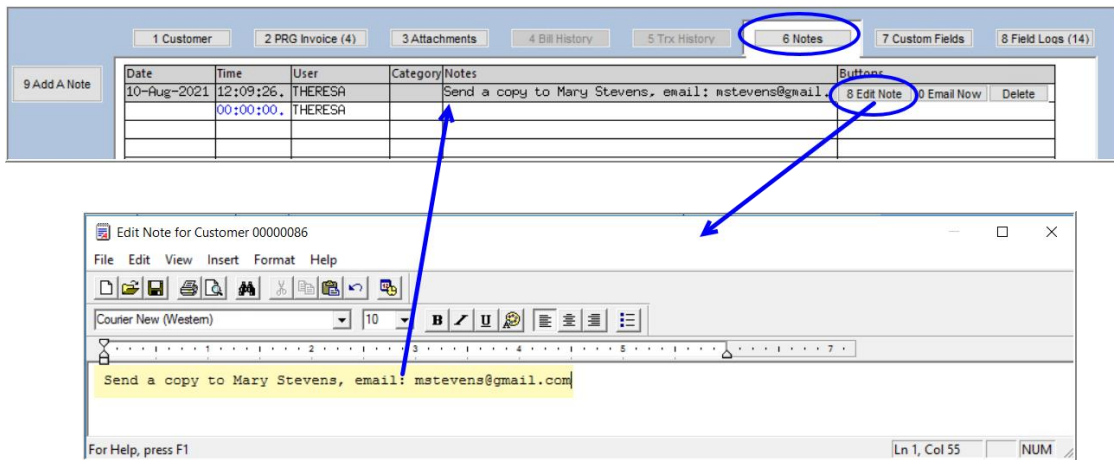
Use the Notes screen to store notes about the customer. Add, delete, or email notes from this screen.

### 7.1. 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. Use the **Edit Note** button to open a text editor; type the note information for this record; when prompted, save the note.

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

Fill in or select from the lookup the category associated with this note. For instance, INVSTK for an invalid sticker. Click the **Edit Note** button to add and/or edit a note to the line. The category may be left blank.



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

### 7.2. Email Note Now

Email any note “now” 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 to whom the note will be sent.



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

This works the same way that emailing an attachment works, as shown [above](#).





1 Customer 2 PRG Invoice (4) 3 Attachments 4 Bill History 5 Trx History 6 Notes 7 Custom Fields 8 Field Logs (14)

9 Add A Note

Date	Time	User	Category	Notes	Buttons
10-Aug-2021	12:09:26.	THERESA		Send a copy to Mary Stevens, email: mstevens@gmail.	8 Edit Note 0 Email Now Delete
	00:00:00.	THERESA			

[AUC] 10000-Customer Maintenance [theresa]

**Sending Attachment via Email**

Optional: Enter Contact Name

Optional: Enter Note

Optional: Enter Note

Required: Enter Email Address

Lookup OK Cancel Clear All

### 7.3. Delete a Line

If a Line Note was added in error and should be deleted, click the **[Delete]** button on the highlighted line.

1 Customer 2 PRG Invoice (4) 3 Attachments 4 Bill History 5 Trx History 6 Notes 7 Custom Fields 8 Field Logs (14)

9 Add A Note

Date	Time	User	Category	Notes	Buttons
10-Aug-2021	12:09:26.	THERESA		Send a copy to Mary Stevens, email: mstevens@gmail.	8 Edit Note 0 Email Now Delete
	00:00:00.	THERESA			

## 8. CUSTOM FIELDS

These fields are used for any type of information. There are 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 numeric values with 2 decimal places
- 5 fields available for numeric values with no decimal places



**Customer Maintenance**

**Cust No**

**Parcel#**

**Primary**

**Secondary**

**Location**

**City**  **St**  **Zip**

**Service Address**

Name 1

Name 2

Location#  Street#  Unit#

Street

Line 2

City  St  Zip

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

**User Defined 30 Characters**

User Defined #1

User Defined #2

User Defined #3

User Defined #4

User Defined #5

User Defined #6

User Defined #7

User Defined #8

User Defined #9

**User Defined 80 Characters**

User Defined #1

User Defined #2

User Defined #3

User Defined #4

User Defined #5

**User Defined Dates**

User Defined #1

User Defined #2

User Defined #3

User Defined #4

User Defined #5

**User Defined Decimal 2 Places**

User Defined #1

User Defined #2

User Defined #3

User Defined #4

User Defined #5

**User Defined Decimal 0 Places**

User Defined #1

User Defined #2

User Defined #3

User Defined #4

User Defined #5

The description of these fields can be changed by using the User Defined Labels screen. This screen can be found in **Misc. Billing** ▶ **Module Maintenance** ▶ **User Defined Labels**.

**User Defined Labels**

**Customer Custom Field Labels**

**User Defined 30 Characters**

User Defined #1

User Defined #2

User Defined #3

User Defined #4

User Defined #5

User Defined #6

User Defined #7

User Defined #8

User Defined #9

**User Defined 80 Characters**

User Defined #1

User Defined #2

User Defined #3

User Defined #4

User Defined #5

**User Defined Dates**

User Defined #1

User Defined #2

User Defined #3

User Defined #4

User Defined #5

**User Defined Decimal 2 places**

User Defined #1

User Defined #2

User Defined #3

User Defined #4

User Defined #5

**User Defined Decimal 0 places**

User Defined #1

User Defined #2

User Defined #3

User Defined #4

User Defined #5



## 9. FIELD LOGS

This screen displays changes that have been made to the customer record in change date order.

**Customer Maintenance - Field Logging**

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 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@adwins.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. FREQUENTLY ASKED QUESTIONS

### 10.1. How Do I Change an Enrolled Program From One Service Type to Another?

If the customer is currently enrolled in RT8 (Trash and Recycling Friday) and wants to change to just R8 (Recycling Friday) do this: *(To transfer services, see section 2.6 to see if this enrolled service can be transferred.)*

1. Stop the current subscription. Click the **STOP SERVICE** button and enter the current date.

**Program Enrollment**  Enrollment only available for Bill Types 90/91

Program	Service	Description	Qty	Enrolled	Start Date	End Date	Stop Date	Last Billed	
CURBSIDE	RT8	Trash & Recycle Friday		01-May-2014	01-Nov-2015	30-Apr-2016		01-Nov-2015	<input type="button" value="Stop Service"/>

Figure 2 Before

**Program Enrollment**  Enrollment only available for Bill Types 90/91

Program	Service	Description	Qty	Enrolled	Start Date	End Date	Stop Date	Last Billed	
CURBSIDE	RT8	Trash & Recycle Friday		01-May-2014	01-Nov-2015	30-Apr-2016	28-May-2015	01-Nov-2015	<input type="button" value="Start Service"/>

Figure 3 After – the stop date is shown in red in the Stop Date field

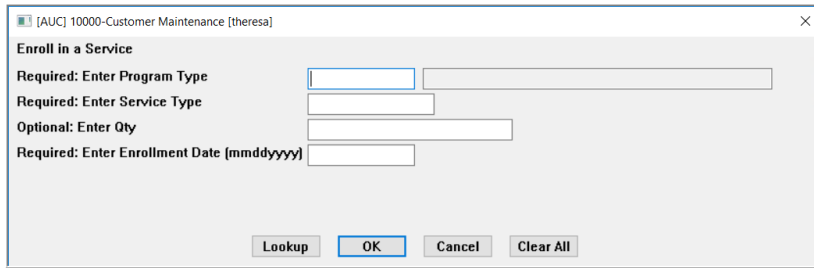


2. Enroll in the new Service. Click the **ENROLL IN SERVICE** button



Figure 4 Enrolling in a different service

Fill in the required fields; click on [OK] when finished.



3. Create and print the bill for the new service. Click the **[Print Bill]** button next to the new service.

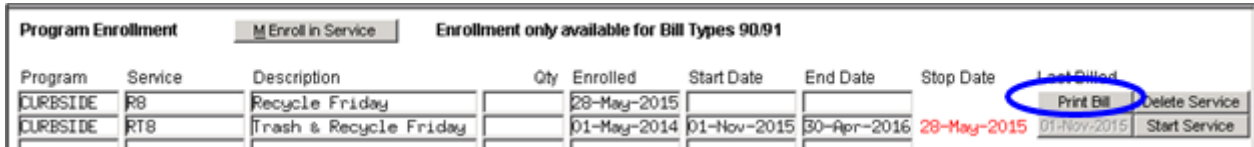


Figure 5 Print the bill for the new service

## 10.2. How Do I Start A Subscription After The Stop Date Is Set?

If the enrolled program has been stopped and the customer wants the service to start again there are a couple of options.

- If the customer has a Bill in the **current bill cycle** and the billed amount should be **PAID IN FULL**, then go to the Bill Payment screen and pay the bill in full. Once the bill payment has been posted – it will automatically remove the stop date and the customer will be added to the next **Current Subscribers Report** issued.
- If the customer has a Bill in the **current bill cycle** and a prorated bill needs to be issued for a different amount than what was billed, then run the **START SERVICE** process described in section 2.5.
- If the customer **does not** have a bill in the **current bill cycle**, run the **START SERVICE** process described in Section 2.5.

## 10.3. How Do I Start A Recurring Program After The Stop Date Is Set?

If a recurring program (PRG Inv) has had the stop date set, go to the customer program invoice tab, and remove the stop date by pressing [SPACEBAR + ENTER]; the next time the program is invoiced it will be included.