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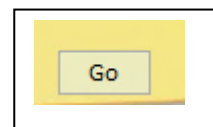
Customer Maintenance

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Customer Maintenance

Customer Maintenance is where all your customer's information such as name, service address, billing address, phone number, history, and what services they have.
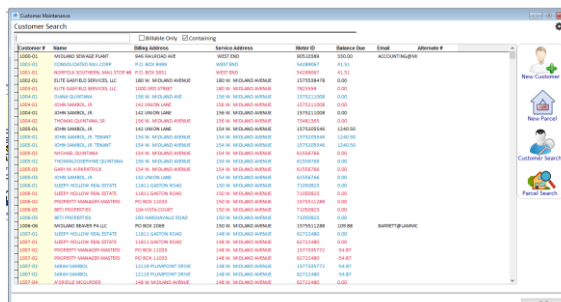
Customer Maintenance can be accessed from the landing page of Diversified Billing using the search area. You can search by customer #, Name, Billing Address, and Service Address. etc. You will need to click on the column you want to search for, and it will change to yellow. You can then search in those areas. There are two checkboxes to enhance the search; Billable Only will only show those customers who are active and the Containing box – when checked will allow you to search for part of a name or address. You must highlight the column you wish to search in.

- When using the search area on the landing page after you find the customer if click once a yellow note will appear with general information related to the customer selected. This will allow you to see basic information about the customers.
- You can access the whole customer account by clicking the go button.
- If you double-click on the customer, it will take you directly to the customer's account.

- It can also be accessed by clicking on **Maintenance** at the top of the home screen of the billing system, then clicking on the first option, **Customer Maintenance**.
- This takes you to the following screen:

- This is where you search for your customer. To search – click to highlight the column you would like to search by, then start typing the customer's information. If you only know part of the customer's information – you can click the search for containing the option as well.
- For example: If you knew the customer lived on Main Street, you could click 'search for containing' and just type in main. This would bring up all customers on Main Street or anything containing Main.
- The Billable Customers Only checkbox should be checked if you are only interested in seeing actively billed customers. This can help you to leave out old accounts that may not be as relevant.
- To create a new customer from this screen, simply click the New Customer button in the right corner. Please remember when you create a new customer, you will need to assign a parcel to the account.
- You can select a customer from this screen by double-clicking on any of the customer's information within the search box.
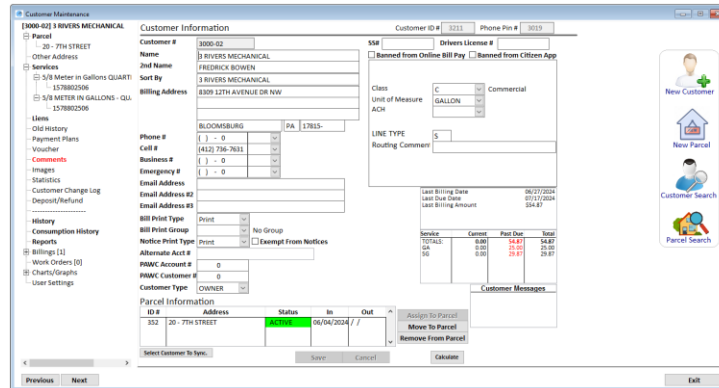
Customer Search Setup

- You can customize your customer search fields by clicking on the gear in the upper right-hand corner of the search screen.
- This brings up the following:
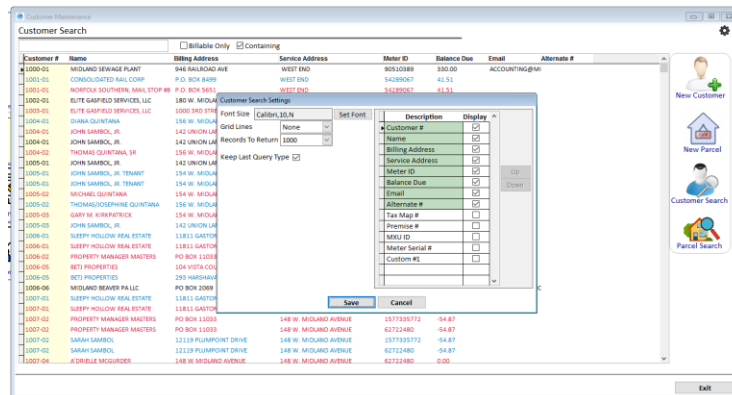
- All fields on the right are available to pull into the customer search.
- If you would like to remove a column, you can simply uncheck the display box. You will then not see this column in the customer search area.
- This search setup is customizable on every pc.
- The items on the left of the Customer Search Settings can be changed; Font Size, Gridlines, Records To Return (this field sets how many customers you see on the search screen at a time), and Keep Last Query Type.
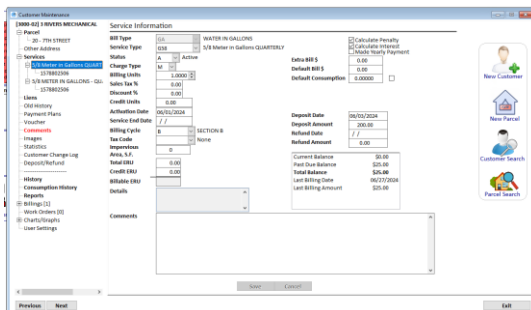- Save will keep your settings.

Customer Maintenance Home Screen

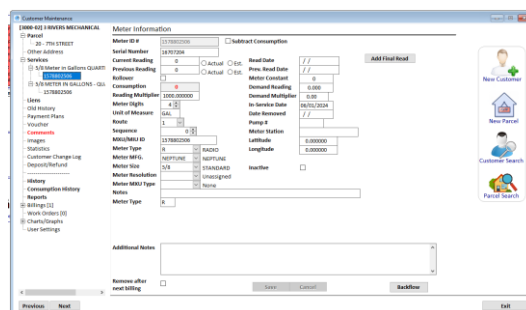- Once you have selected a customer you will come to this screen.

- The left-hand side of the screen lists the parcel for the property, the customer's services, Liens, Payment Plans, Vouchers, Comments, Images, and Statistics. Customer Change Log, and Deposit/Refund (where applicable).
- **Parcel** – The customer's address that the service is associated with.
- **Services** - Below these are the services associated with the customer. This customer has Sewer 5/8 Meter in Gallons and Water 5/8 in Gallons.
  - Clicking on the service will give you more information about the service.
- **Meter Information** - Under each service meter information will show. Refer to the Meter Maintenance documentation for information on meters in customer accounts.

Liens

- The left-hand side gives you the option to store lien information. If you right-click on Liens, it will allow you to add a lien to the customer's account.
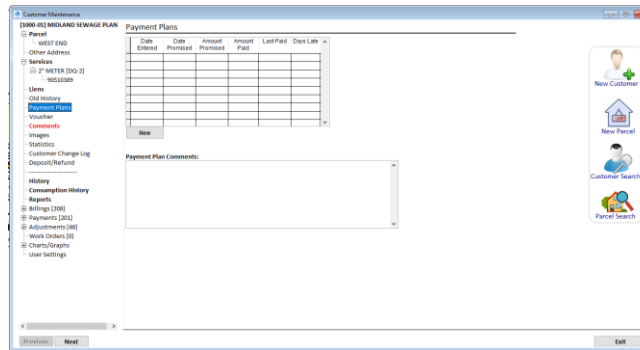
- You can click on liens to see existing information or right-click to add a new lien
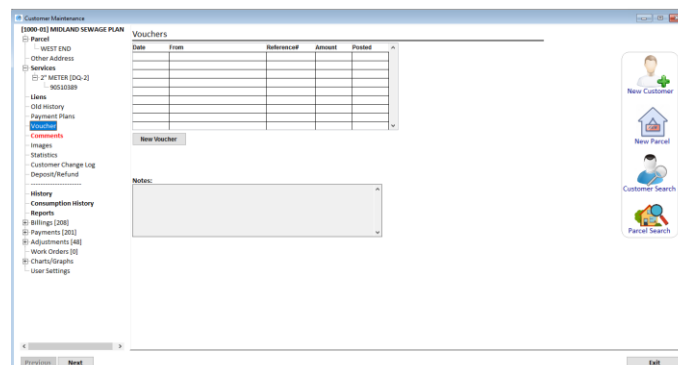- Enter the lien information and click save

Payment Plans

- You can see what payment plans are in the system by clicking payment plans.
- This gives you the day you entered the payment plan, the day they promised to pay, and the amount they promised to pay.
- The last three fields, Amount Paid,' Last Paid,' and 'Days Late' are auto populated as receipts are processed for the customer.
- Payment Plan Comments can be added in this area.
- You can add new payment plan information by right-clicking on the Payment Plan and the 'New' button. Add the information needed for the payment plan and click save.


Voucher

- You can see what Vouchers have been entered into the system by clicking Voucher.
- This gives you the date of the voucher, where the voucher is from, referenced #, amount, and posted.
- Voucher Notes can be added in this area.
- You can add new voucher information by right-clicking on the Voucher button and then the 'New' button. Click save when finished.

Comments

- You can add and always should add comments to the customer's account. This will allow anyone who accesses the account to see what calls have been received and what has been done to the customer's account. Enter the comment and click save.
- The word 'Comments' will be red if you have comments entered for this customer.
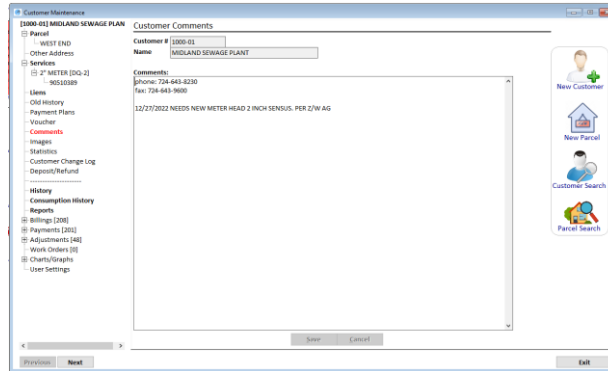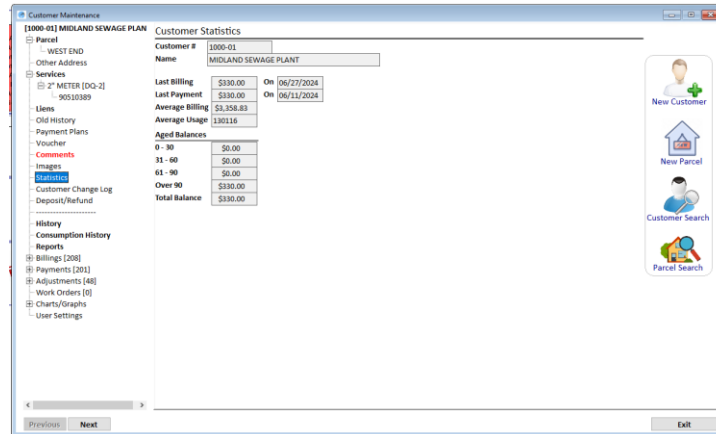
Images

- Clicking on Images will show any images that have been attached for that customer
- There is detailed Image setup documentation in the LMS. Image Types must be set up in Image Maintenance prior to adding an image.
- To add an image to a customer account, right-click on Images and select Add Image - select Image Type, Add Description, Date-Today's date will always be populated, Image File-use the three eclipse buttons to locate your image and add in, and you can add any notes related to the document/image.
- Once you are finished select Save.
- The image will now be on the customer's account. You will be able to view, print, and email this image.
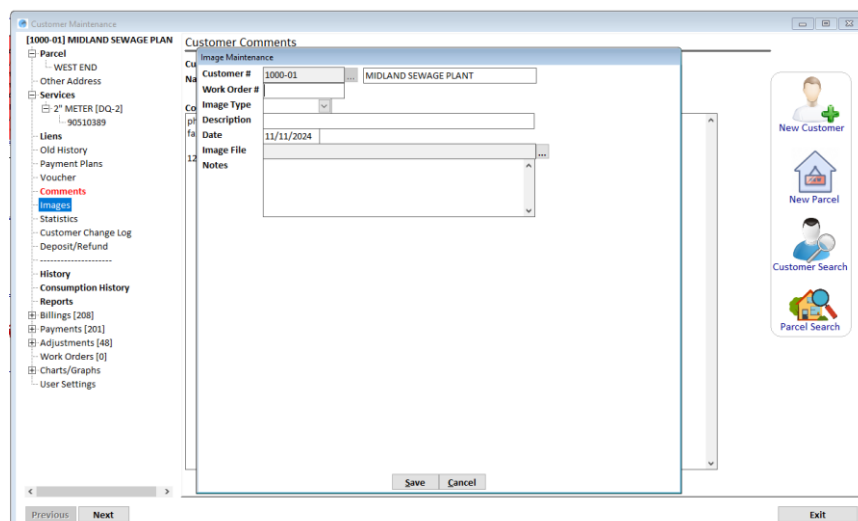
Statistics

- Clicking on Statistics will show general information on the customer account. Information included in Customer Statistics includes Last Billing, Last Payment, Average Billing, Average Usage, and Aged Balances.

Customer Change Log

- Clicking on Customer Change Log will give you an audit of what has been done on the customer's account. It will show you the table that was affected, Field Name, Action, Date, Time, User, Old Value, and New Value.
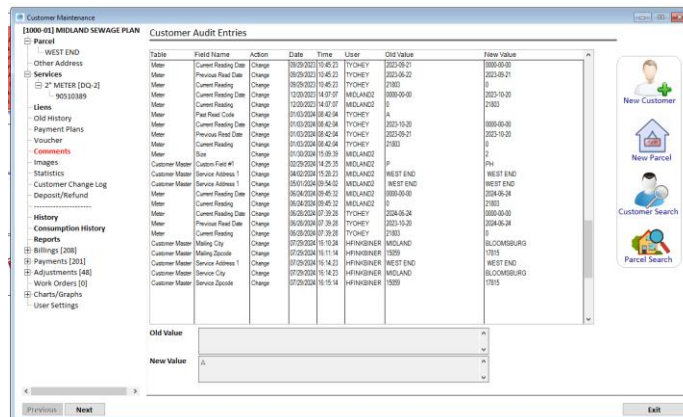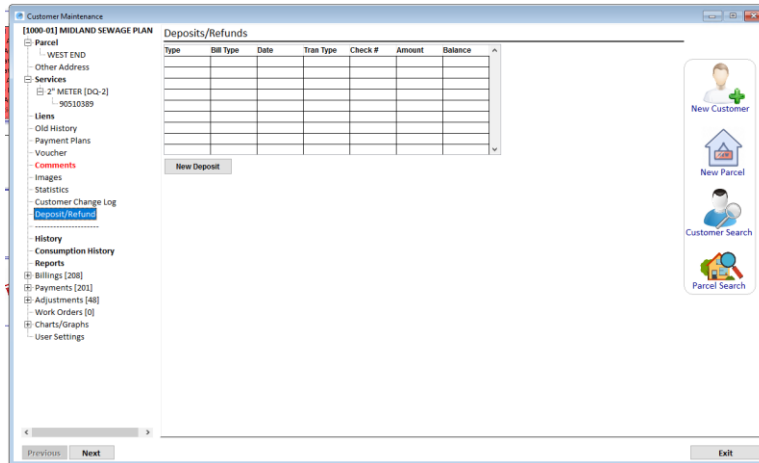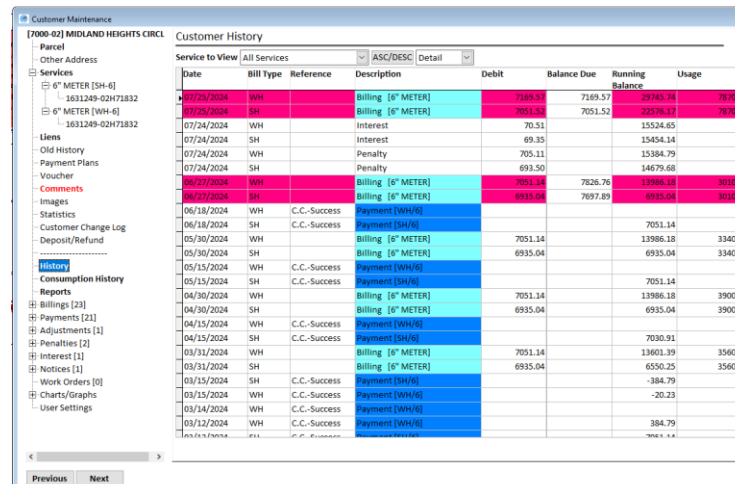
Deposit/Refund

- The Deposit/Refund option allows you to enter customer deposits per bill type.
- These deposits can then be applied for and refunded during the final billing process. To enter a new deposit, click on Deposit/Refund and press 'New Deposit'
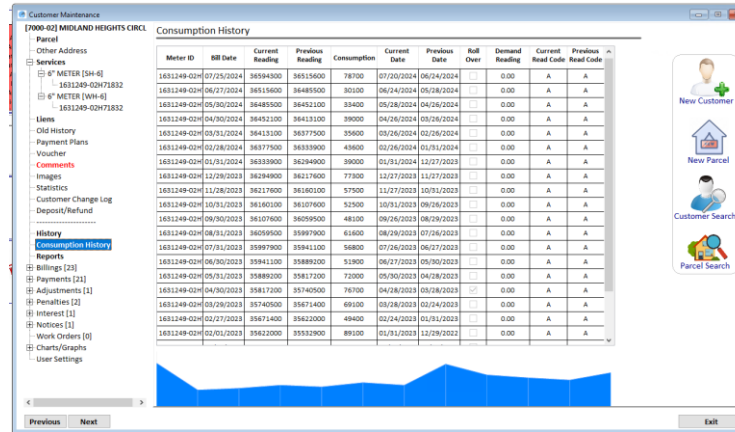

Customer History

- Clicking on History on the left-hand side will give you the customer history screen.

- The fields on this screen are Transaction Date, Type, Bill Type, Reference, Description, Debit Credit, Usage,

- Balance Due – The amount that is left due out of a specific balance

- Running Balance – The current amount due

- The drop-down box in the right corner allows you to see the history screen by detail, debit credit, and summary
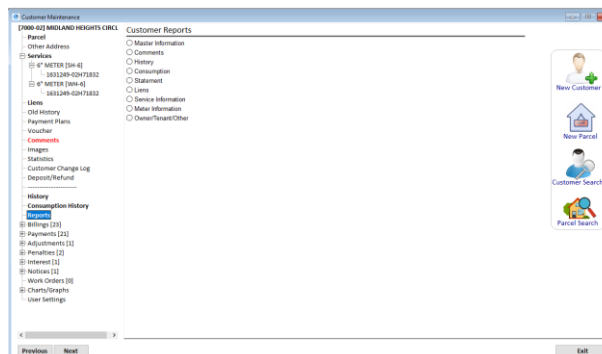

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Consumption History

- Consumption history shows you the meter ID and previous Meter IDs associated with the account, current and previous reads, and consumption


Customer Reports

- These reports are specific to the customer. When selecting any of the reports you will be able to print, preview, save, email, or export
- Master information – Gives you specific customer information such as name, billing address, etc.
- Comments – a report of customer comments
- History – a printout of customer history
- Consumption – Customer consumption history
- Statement – Customer information with current due to send to customer. A snapshot of their account balance
- Liens – any lien information
- Service Information – Current Service information
- Meter Information – Meter Detail
- Owner/Tenant/Other
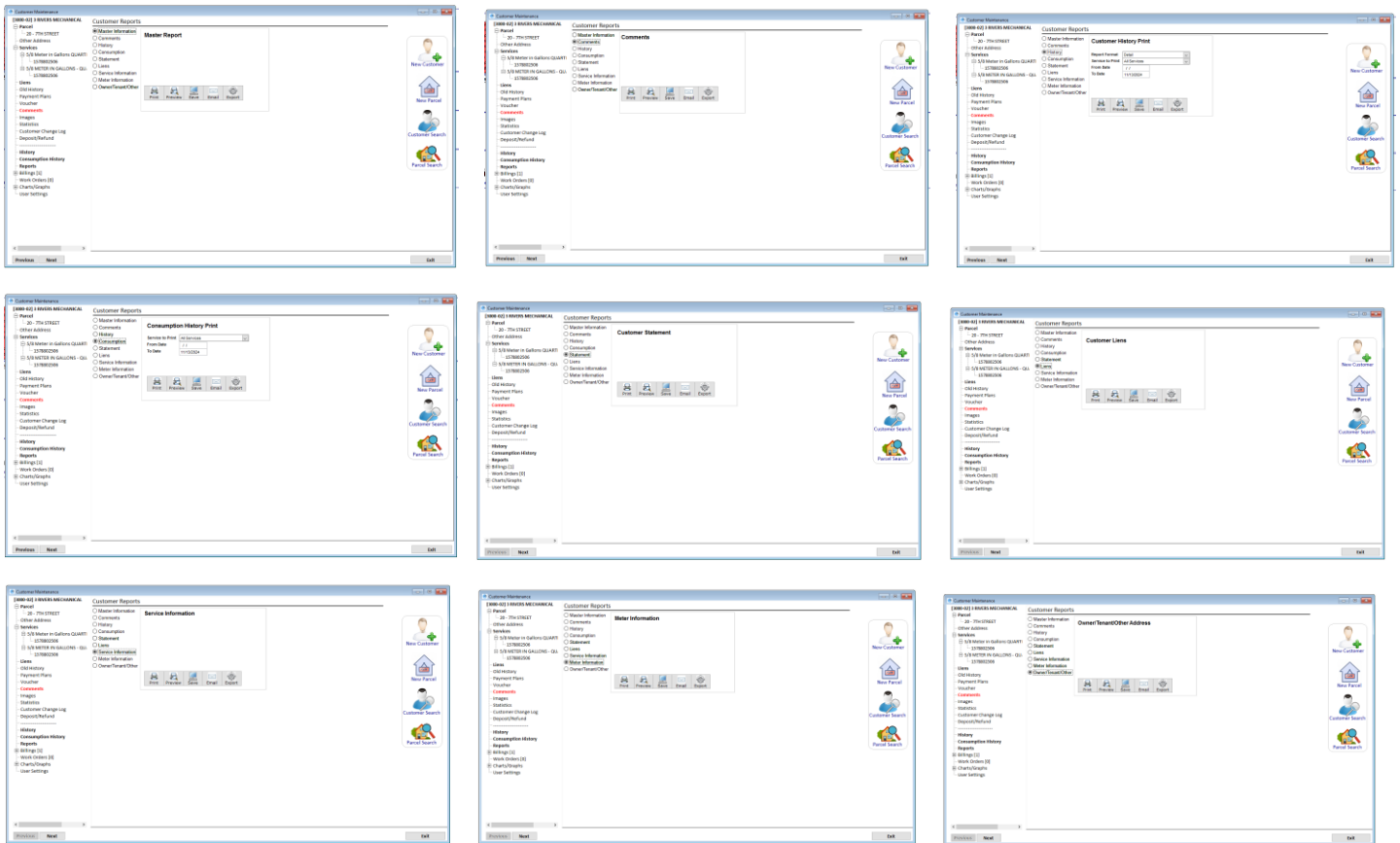
Billings

- Expanding the plus sign next to billings will give you all bills specific to that customer
- Clicking on the bill will give you detailed billing information
- On the right side you can print, preview, save or email the bill to the customer
- Anything in Red has not been paid for.

Payments

- Expanding the plus sign next to payment will give you all payments specific to that customer
- Clicking on a specific payment will give you details associated with that transaction

Adjustments

- Expanding the plus sign next to adjustments will give you all adjustments specific to that customer
- Clicking on a specific payment will give you details associated with that transaction

Penalties

- Expanding the plus sign next to penalties will give you all penalties specific to that customer
- Clicking on a specific penalty will give you details associated with that transaction
- You can also remove the penalty (if applicable) by selecting remove. This will create an adjustment and remove the penalty from the account. It is always best to comment on the account of the reason the penalty has been removed.
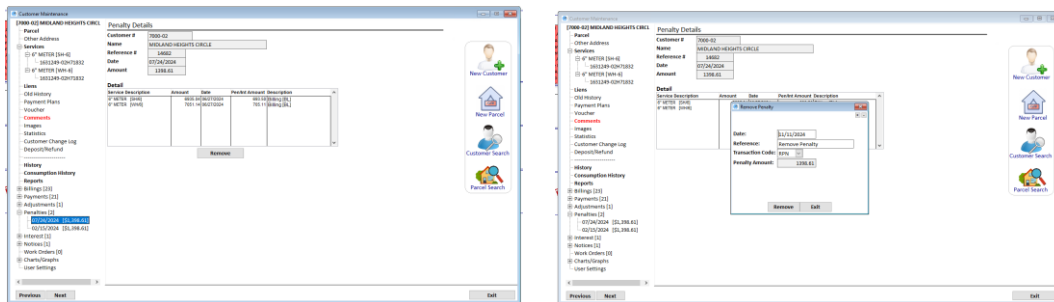
Interest

- Expanding the plus sign next to interest will give you all interest specific to that customer
- Clicking on a specific interest item will give you details associated with that transaction
- You can also remove the interest (if applicable) by selecting remove. This will create an adjustment and remove the interest from the account. It is always best to comment on the account of the reason the interest has been removed.
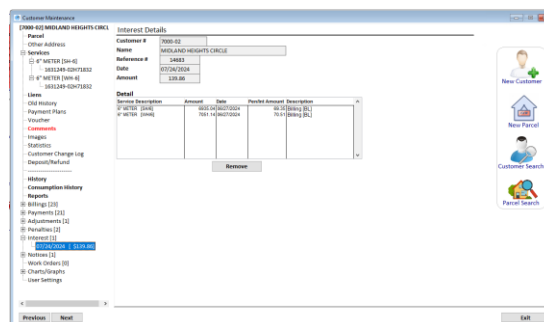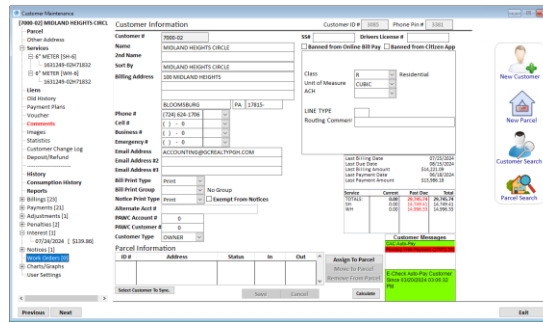
Notices

- Any late notices that are produced in the billing system will be shown here. In the notice processing area, there is a check box that will need to be checked to allow this information to be pushed into the customers' accounts.
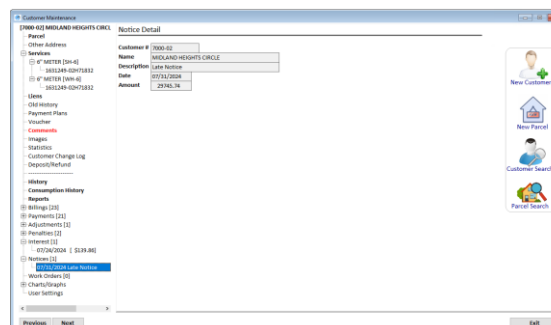
Work Orders

- Click the plus sign to expand all work orders
- Click the work order to see specific work order information

Chart/Graphs

- There are three available graphs, Consumption, Billing, and Aged balance
- These are based on customer history
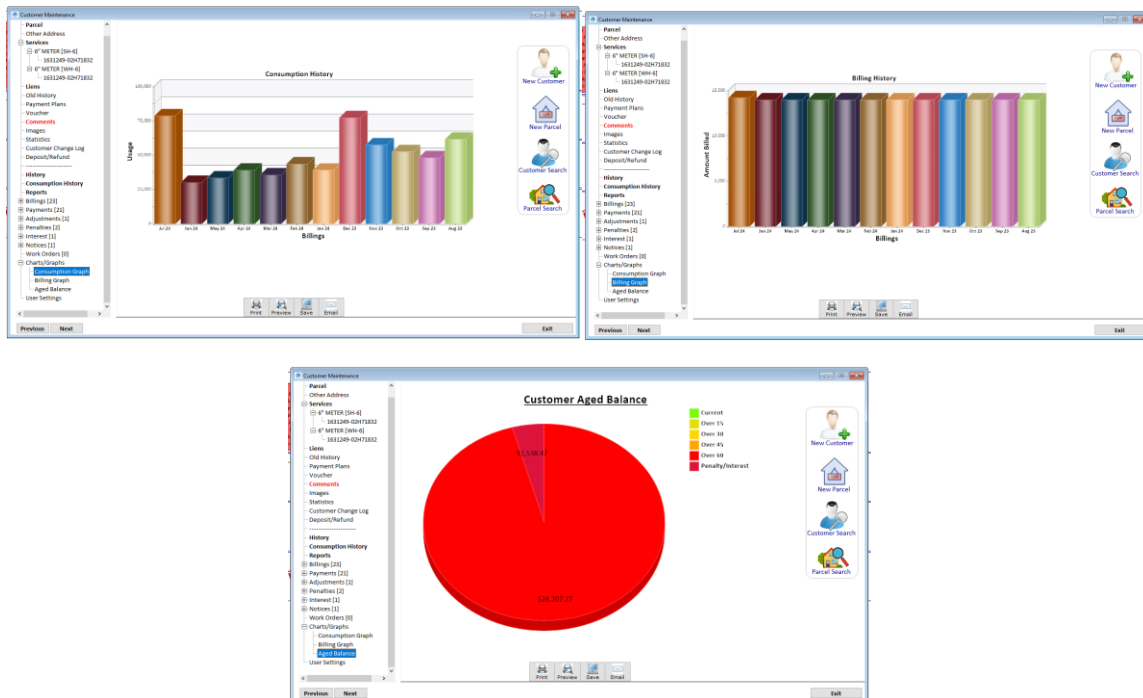
User Settings

- These are set during setup.
    - This allows you to pick your font size, colors, and view of your history.
    - You can select what fields you would like to see in the history by checking the checkbox under 'selected'
    - You can order them by using the move up and down options
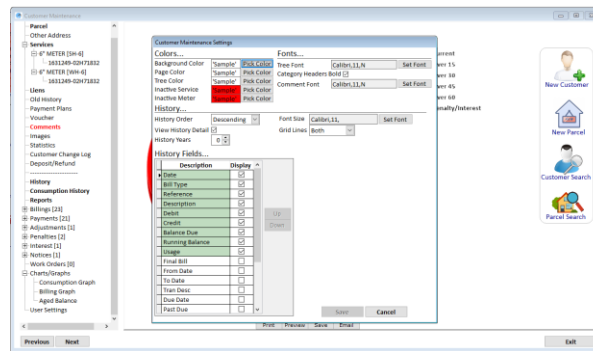
Customer Information

- In the large area shows the following information:
    - Customer Number – The customer's accounts number.
    - Name – Customer Name on the account
    - 2nd Name – Second Name on account (if applicable)
    - Sort By – This is a required field that allows to search for the customer's account
    - Billing Address – The customer's billing address where their bill would be mailed.
    - Phone numbers – Phone, Cell, Business, and Emergency
    - Email Address Fields – A customer email address will allow bills and notices to be sent via email
    - Bill Print Type – This allows for the way the customer wants to receive their bill (print, email, or both)
    - Bill Print Group – Selecting the bill print group will send bill to owner if you would like the bill to go to the owner group
    - Notice Print Type – This allows for the way the customer wants to receive their notices
    - Alternate Acct # - This field is for clients who may like to keep track of more than one account number
    - PAWC Account # and Customer # - This field is for those clients who bring in their meters reads through PA American
    - Customer Type – This dropdown area is to select if the account is an owner or tenant
    - SSN and Driver's License – These fields are used for tracking SSN and Driver's License numbers
    - Banned from Online Bill Pay & Banned from Citizen App – Checking either of these boxes will not allow the customer to be able to submit payments in either of these website-based payment options
    - Custom Fields - These can be set up for the clients to track specific information for that customer.
    - Last Billing Date – The date when the last bill was posted to the customer accounts
    - Last Due Date – Due date of the most recent bill
    - Last Billing Amount – Amount of the most recent bill
    - Current Balance – The current Due

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- Past Due Balance – Late Due
- Grid Box – Shows Service, Current Balance related to that service, Past Due Balance related to that service, and Total Balance related to that service – Current and Past due
- Customer Message – Flags for the account such as Invalid Service end date, and missing service type. ACH customer, etc.
- Parcel Information – Shows ID# related to the parcel; Address of the parcel, Status shows the status of the account (active or inactive), and In and Out of when the parcel was put into service or taken out of service. If there are multiple IDs listed, you can click on it, and it will take you to the customer account. There should always be just one active customer per parcel.