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Interest Processing



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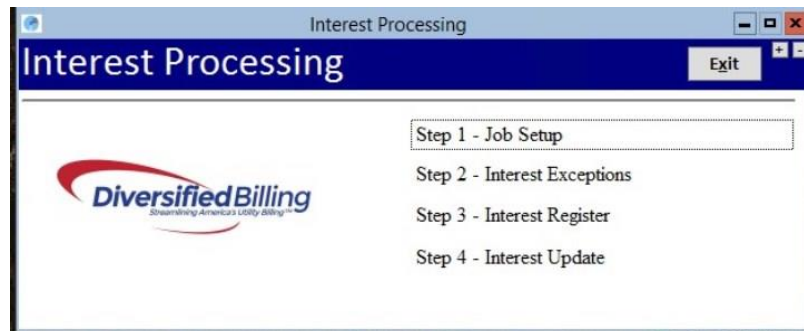
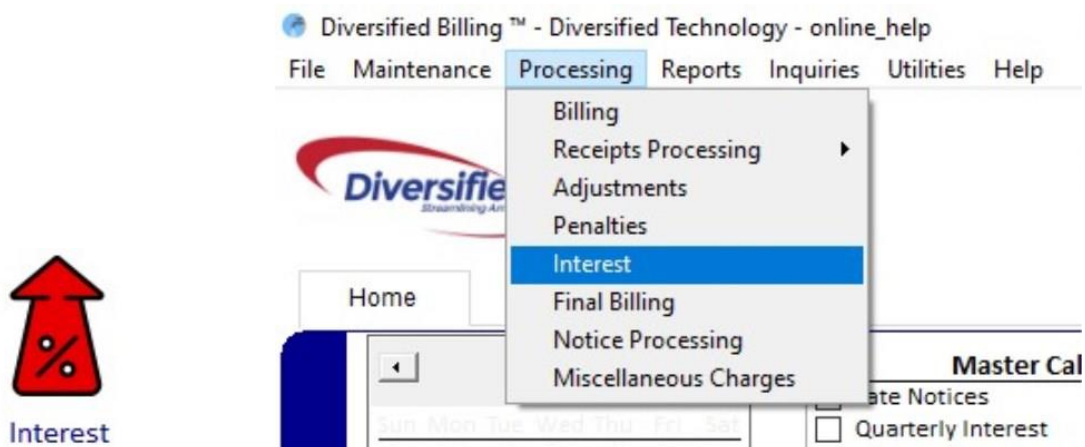
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Interest

This process will post interest to delinquent customers based upon the billing due date and services. Interest can be posted every month if needed. The interest percentage is located on the Billing Rates.

Interest can be accessed from the Landing Page with the Interest icon, or by navigating to the following location.

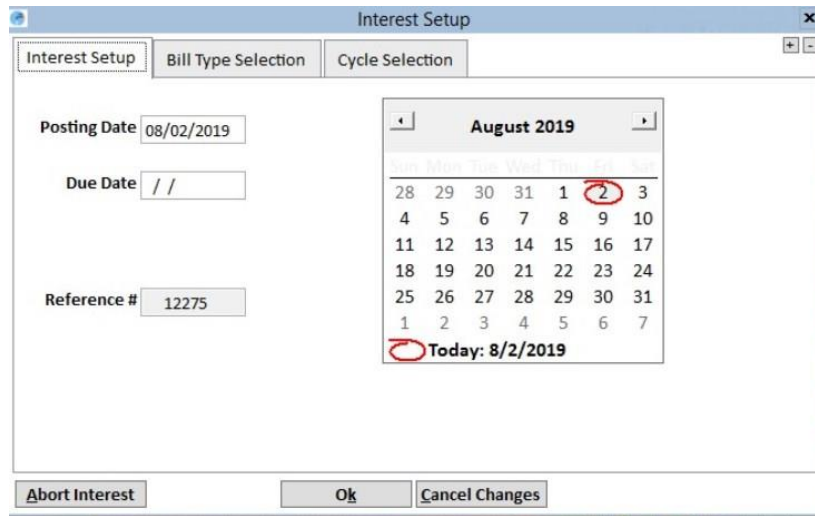
- ☐ First navigate to the Processing option from the menu toolbar
- ☐ Select the Interest dropdown option



Step 1: Job Setup Tab

Interest Setup Tab

- ☐ Posting Date – This is the day interest will show in the customer history.
- ☐ Due Date – the due date of the billing to which you want to post the interest

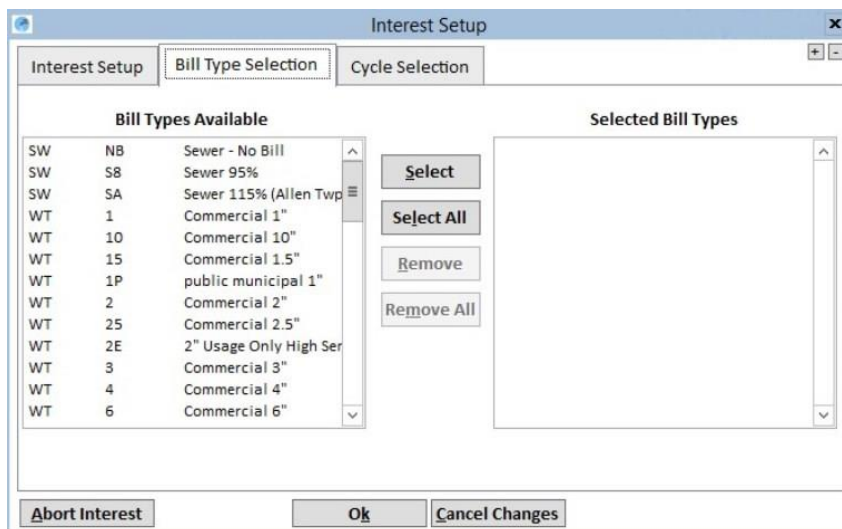


The Interest Setup dialog box has three tabs: Interest Setup, Bill Type Selection, and Cycle Selection. The Interest Setup tab is active. It contains the following fields:

- Posting Date: 08/02/2019
- Due Date: / /
- Reference #: 12275

To the right of these fields is a calendar for August 2019. The date 8/2/2019 is highlighted with a red circle and labeled "Today: 8/2/2019". At the bottom of the dialog are three buttons: Abort Interest, Ok, and Cancel Changes.

Bill Type Selection Tab – select the services to which the interest will be applied.

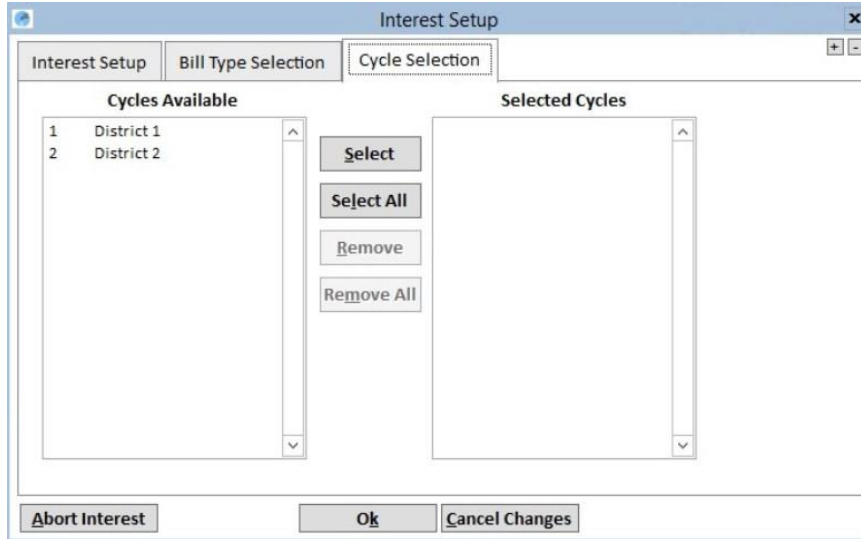


The Interest Setup dialog box is shown with the Bill Type Selection tab active. It displays a list of available bill types on the left and a list of selected bill types on the right. The available bill types are:

Code	Description
SW NB	Sewer - No Bill
SW S8	Sewer 95%
SW SA	Sewer 115% (Allen Twp)
WT 1	Commercial 1"
WT 10	Commercial 10"
WT 15	Commercial 1.5"
WT 1P	public municipal 1"
WT 2	Commercial 2"
WT 25	Commercial 2.5"
WT 2E	2" Usage Only High Ser
WT 3	Commercial 3"
WT 4	Commercial 4"
WT 6	Commercial 6"

Buttons for selection are: Select, Select All, Remove, and Remove All. The Selected Bill Types list is currently empty. At the bottom are three buttons: Abort Interest, Ok, and Cancel Changes.

Cycle Selection Tab – select the billing cycles to which the interest will be applied. (This may be optional if no billing cycles are established.)

The "Interest Setup" dialog box has three tabs: "Interest Setup", "Bill Type Selection", and "Cycle Selection". The "Cycle Selection" tab is active. It contains two list boxes: "Cycles Available" on the left and "Selected Cycles" on the right. The "Cycles Available" list box contains two items: "1 District 1" and "2 District 2". Between the two list boxes are four buttons: "Select", "Select All", "Remove", and "Remove All". At the bottom of the dialog box are three buttons: "Abort Interest", "Ok", and "Cancel Changes".

Cycles Available	
1	District 1
2	District 2

Selected Cycles	
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Step 2: Interest Exceptions

- ☐ Interest Exceptions will allow you to enter in customers that you do not want to penalize. Otherwise, this option can be skipped.
- ☐ You can add the customer by selecting the magnifying glass, then selecting the customer you want to add, and hitting 'add' at the bottom of the screen shown below.

Interest Exception Customers

Customer #

Interest Exceptions Customer Search

☐ Billable Customers Only

☐ Search for Containing

Reference/Check # Search:

☐ Exact

Customer #	Name	Service Address	Alternate #	Tax Map #	Address 1
00001	DAVID ABEL	1000 N MARKET ST			1000 N MARKET ST
00002	TIMBERVILLA RETIREMENT COND	TIMBERVILLA RETIR CONDOS			C/O DEPT 588 - BOY
00003	MELVIN T HOAK OR CURRENT RES	100 MOUNTAINSTONE DR			212 COLONIAL CRE
00005	DAS REAL PROPERTIES LLC	842 N MARKET ST			724 LAWN RD
00006	DOUG ABERNETHY	11 WOODVIEW DR			11 WOODVIEW DR
00007	KIM HAYFORD	144 HEISEY AVE			144 HEISEY AVE
00008	ALAN ACR	451 HESS RD			451 HESS RD
00009	DUANE & LISA REED	463 W RIDGE RD			463 W RIDGE RD
00010	GERALD G JR & EMILY J HUESKEN	133 HILLCREST			133 HILLCREST LN
00011	NICOLE CRAVER & KEVIN NEWCO	783 NEWVILLE RD			323 EAST MAIN ST
00012	ROBYN E & CHRISTINE B JOHNS	101 MOUNTAINSTONE DR			101 MOUNTAINSTO
00013	KIRK D EVANS	102 MOUNTAINSTONE DR			102 MOUNTAINSTO
00014	BOBBI BARTCH	103 MOUNTAIN STONE DR			103 MOUNTAIN STO
00015	CALEB & KAYLA EBERSOLE	289 BUTTWOOD DR			289 BUTTWOOD
00016	DEBORAH MURRAY	104 MOUNTAINSTONE DR			104 MOUNTAINSTO
00017	HERVEY D & NORMA B AHLBORN	228 HILLCREST LN			228 HILLCREST LN
00018	JEFFREY & HEIDI KOZLOWSKI	120 POPLAR LN			120 POPLAR LN
00019	LINDA J TERRY	100 MOUNTAINSTONE DR			100 MOUNTAINSTO

[illegible]

Step 3: Interest Register

- ☐ Generate the Interest Register
- ☐ Print and review for any customers that may need to be listed in the exception's options.
- ☐ If a customer should be exempted, go back to Step 2. If you go back to Step 2, you will need to re-generate the penalty register.

Step 4: Interest Update

Post the transactions to the customers accounts. This step should **ONLY** be selected, when all the interest amounts have been reviewed on the interest register.

Step 5 – Interest Adjustment

Interest adjustments can be made directly from the customer maintenance screen. Select the interest that you want to remove and select the remove button. If everything looks okay, then select remove. This will remove the penalty and it can then be seen in the adjustment area.

