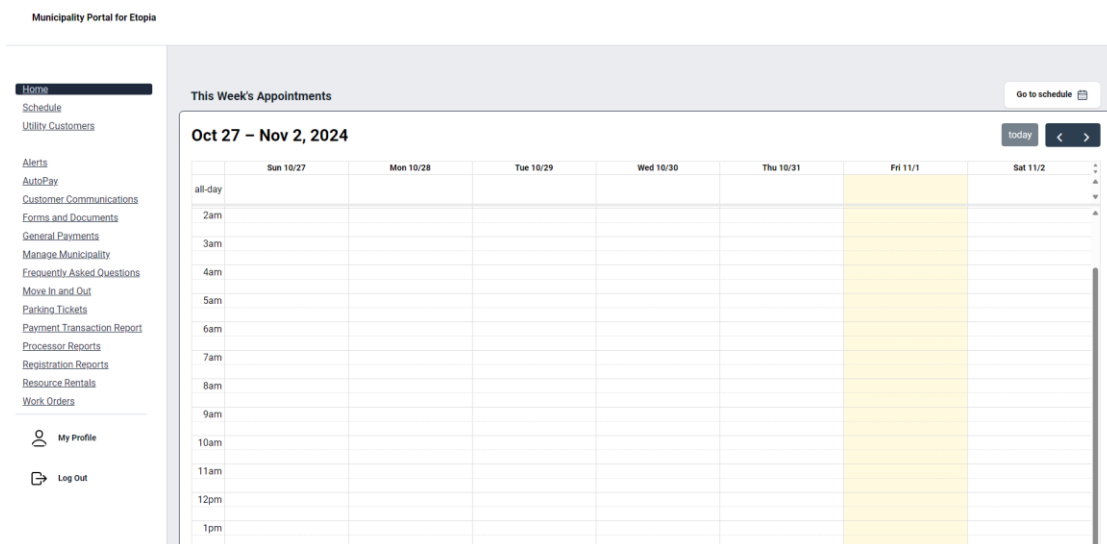


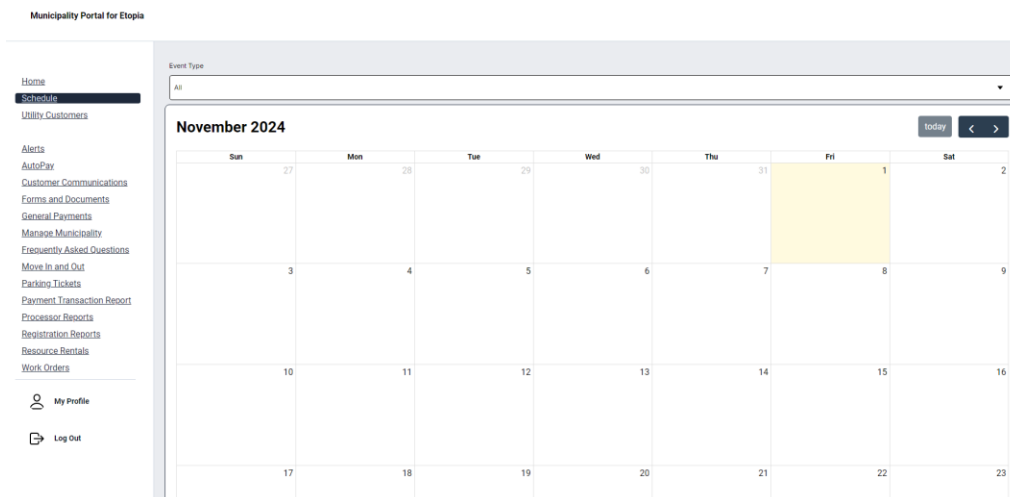
Overview of the Municipality Portal in the Citizen Action Center

The Municipality Portal options are available on the left side menu of the screen to give you quick access to the functions and reports you might need daily.

1. When you login, it will default to the **Home** menu option with a page showing weekly calendar information about important dates related to your portal.



2. The **Schedule** menu option shows a monthly formatted calendar which might include Diversified Billing System master calendar information or scheduled events like a park pavilion reservation to help you see these events or tasks in one place.



3. **Utility Customers** menu gives you access to a list of these customers. You can enter information into the search criteria like Email, Name, Customer/Account Number, etc. and it will automatically query up to a maximum of 500 accounts matching what is entered. If no customer accounts are shown, change your search fields and try to search again.

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My Profile
 Log Out

Email

Name

Service Address

Phone

Customer Number

Customers

| Customer Number | Name | Address | Phone Number | Email | Payment |
|-----------------|------------------|------------------|--------------|----------------------------------|---------------------|
| 0109700 | Tom Tobin | 95 E 10th Street | 5702450050 | ttobin@diversifiedtechnology.com | Pay |
| 0109710 | John Smith | 95 E 10th St | 5702450050 | sales@diversifiedtechnology.com | Pay |
| 0109800 | Tom Tobin | 95 E 10th Street | 5702450050 | ttobin@diversifiedtechnology.com | Pay |
| 0109900 | JOSEPH GALICITO | | | No Profile Created | Pay |
| 0110000 | LARRY DURAY | | | No Profile Created | Pay |
| 0110100 | SHANNA MILLER | | | No Profile Created | Pay |
| 0110300 | DINO SCARTON | | | No Profile Created | Pay |
| 0110400 | MARY ANN POLLOCK | | | No Profile Created | Pay |
| 0110500 | DINO SCARTON | | | No Profile Created | Pay |
| 0110600 | DAVID KIEL | | | No Profile Created | Pay |

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Accounts are shown with and without profiles that are attached to the account. If there are multiple profiles attached to an account, the account might show multiple times in the list.

The green “Pay” button is available next to each account so you can take a credit card via a swipe or enter credit card information. If an account shows multiple times with different profile and emails and the same customer number, it does matter which Pay button you click since it is applied to the respective customer number of that Pay button.

Please note that the Pay button only allows payments for credit cards.

- Alerts:** This page shows Alerts sent out by the municipality to citizens with Profiles, who have chosen the categories to receive emails, SMS text messages, and/or automated voice calls. Under each category are priority levels designated as High, Standard, or Low. Alerts are sent based on the category and priority the citizen chooses in their Profile settings. Once an Alert is added and saved, the system will send these out in the background automatically.

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Manage Alerts

[Alerts Report](#)

Alerts

Alerts Sent
0
Past 30 days

Total Alerts Sent
1

Date

Start 10/02/2024 End 11/01/2024

Alerts

| ID | Severity | Title | Details | Send On | Created On | Created By |
|-------------------|----------|-------|---------|---------|------------|------------|
| No data for table | | | | | | |

Rows per page: 10

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- Auto Pay:** This page shows a report of utility customers who have opted to use a stored card so that their bill will automatically be charged for the balance due on the bill due date. There is CSV export button available on the right-hand side of the Auto Pay windows to download a spreadsheet copy of all the data.

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Auto Pay

Total Customers
11
Using Auto Pay

Customers

| Account Number | Name | Email | Payment Method | Billing System ACH Enabled | Total Due | Due Date | Created On |
|----------------|-------------------------|----------------------------------|----------------|----------------------------|-----------|--------------|------------|
| 0113900 | JORDON R FORST | sales@diversifiedtechnology.com | Credit Card | Yes | 225.42 | 11/01/2024 | 05/01/2024 |
| 0120000 | VACANT | sales@diversifiedtechnology.com | Credit Card | No | | Invalid date | 05/20/2024 |
| 0111100 | VACANT | sales@diversifiedtechnology.com | E-Check | No | | Invalid date | 05/20/2024 |
| 0105100 | MRS DOMINIC SCARMIZZINO | sales@diversifiedtechnology.com | Credit Card | No | 79.64 | 11/01/2024 | 05/20/2024 |
| 0101800 | SAMANTHA MOYER | sales@diversifiedtechnology.com | Credit Card | No | 161.40 | 11/01/2024 | 05/20/2024 |
| 0302600 | BRUCE GOSSARD | sales@diversifiedtechnology.com | E-Check | No | 231.42 | 11/01/2024 | 05/20/2024 |
| 0111600 | FRANK OSHABEN | sales@diversifiedtechnology.com | Credit Card | Yes | 120.88 | | 05/20/2024 |
| 0109700 | JOSEPH BLAZAUSKI | ttobin@diversifiedtechnology.com | E-Check | No | 159.28 | 11/01/2024 | 10/21/2024 |
| 0109710 | MARTIN CHAPPELL | sales@diversifiedtechnology.com | Credit Card | No | 105.54 | | 06/20/2024 |
| 0709000A | JOEL BOBOLSKY | ttobin@diversifiedtechnology.com | Credit Card | No | | Invalid date | 08/14/2024 |

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6. **Customer Communications:** this module shows a list of citizens who have submitted communication requests in categories and departments set up. Typically, municipalities will set up categories to allow people to report potholes, down signs or light posts, and any other things they need to communicate to the municipality.

A date range and status designations can be chosen for the search criteria of communication to view.

To organize communications entered by citizens or customers, each one will initially be set to New. As communications are addressed, the status can be changed to In Progress, Complete, or Reopen. Click the “View” button next to each communication to see more detail and to be able to change the communication status for each one.

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Customer Communications

Customer Communication Report

Customer Communication Maintenance

Customers

27

Open Conversations

Customers

13

In progress Conversations

All Communications

Date

Start 10/02/2024

End 11/01/2024

Communication Status

All

Communications

| Action | Communication | Date | Customer Name | Customer Email | Title | Description | Status |
|----------------------|--------------------------|------------------|---------------|----------------------------------|--|--|--------|
| View | Report To Public Service | 11/01/2024 10:30 | Tom Tobin | ttobin@diversifiedtechnology.com | Pot Holes on Main Street | Could you please send a repairman out to look at main street there are a lot of potholes between the 100 and 200 block | New |
| View | Report To Police | 11/01/2024 10:30 | Tom Tobin | ttobin@diversifiedtechnology.com | There has been some kids in the park after dusk climbing on the pavilion roofs | There have been some kids in the park after closing. They are climbing on the pavilion roofs and I am concerned they will get hurt | New |

There is a button under the Customer Communications title called “Customer Communication Maintenance.” This tab allows the municipality to add, edit, and delete types of communications and assign departments to route communications to the right department or staff member in the municipality for attention.

Customer Communications

Customer Communication Report

Customer Communication Maintenance

Customer Communication Maintenance

Create Communication

Communications

| Actions | Status | Title | Description | Top Communication | Department | Primary Email | Secondary Email | Date |
|-----------------------------------|--------|------------------|-------------|-------------------|-------------------------|---------------------------------|---------------------------------|------------|
| <div>Edit</div> <div>Remove</div> | Active | Test Service 006 | | No | bill.stage department 1 | billh@diversifiedtechnology.com | billh@diversifiedtechnology.com | 01-12-2023 |

7. **Forms and Documents:** this module is where a municipality can monitor and view submissions that come from citizens and work with Diversified Technology support to configure custom forms and options to streamline important data flows.

To see the submissions of forms, the selection criteria allow a date range and status to be chosen to view the submissions.

Next to each submitted form, click the “View” button to be able to change the status of the form and view a quick list of information in the fields of the form.

Municipality Portal for Etopia

Manage Forms And Documents

Submissions Report | Document Maintenance

Forms and Documents

Date: Start 10/02/2024 End 11/01/2024 Status: All

Responses

| Actions | Document | Submitted By | Status | Requires Payment | Is Paid | Payment Amount | Submitted Date |
|-------------------|----------|--------------|--------|------------------|---------|----------------|----------------|
| No data for table | | | | | | | |

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There is a button under the Manage Forms and Documents title called “Document Maintenance.” This tab allows the municipality to add, edit, and delete types of forms and documents. Diversified Technology support will be able to assist you in configuring custom forms and settings to meet your records and workflow needs.

Municipality Portal for Etopia

Manage Forms And Documents

Submissions Report | Document Maintenance

Form and Document Maintenance

Create a Form and Document

Customers Payments

| Actions | Title | Department | Log In Required | Primary Email | Secondary Email | Status | Date |
|---|-------------------------|-------------------------|-----------------|---------------------------------|---------------------------------|--------|------------|
| Edit Remove | Final Read Request | bill.stage department 7 | No | billh@diversifiedtechnology.com | billh@diversifiedtechnology.com | Active | 04-03-2024 |
| Edit Remove | Move In/Out | bill.stage department 7 | No | billh@diversifiedtechnology.com | billh@diversifiedtechnology.com | Active | 04-03-2024 |
| Edit Remove | Move In/Out | bill.stage department 7 | No | billh@diversifiedtechnology.com | billh@diversifiedtechnology.com | Active | 04-03-2024 |
| Edit Remove | Rental Inspection | bill.stage department 7 | No | billh@diversifiedtechnology.com | billh@diversifiedtechnology.com | Active | 04-03-2024 |
| Edit Remove | Service Registration | bill.stage department 7 | No | billh@diversifiedtechnology.com | billh@diversifiedtechnology.com | Active | 04-03-2024 |
| Edit Remove | Vendor Reservation Form | bill.stage department 7 | No | billh@diversifiedtechnology.com | billh@diversifiedtechnology.com | Active | 04-03-2024 |
| Edit Remove | Zoning Application | bill.stage department 7 | No | billh@diversifiedtechnology.com | billh@diversifiedtechnology.com | Active | 04-03-2024 |

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8. **General Payments:** This page allows you to see non-utility bill payments made by citizens. These can be configured based on the municipality needs to accept payments. For example, Rental, Court Fines, or Parking Tickets.

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Manage General Payments

General Payments Report General Payments Maintenance

General Payments

All Payments

Date: Start 10/02/2024 End 11/01/2024

Payment Amount: Transaction Id: Transaction Reference: Payment Type: All

Payment Status: All

Customers Payments

| Date | Transaction ID | Reference | Name | Amount | Payment Method | Payment Status |
|-------------------|----------------|-----------|------|--------|----------------|----------------|
| No data for table | | | | | | |

Rows per page: 10 0 - 0 of 0 Previous Next

There is a button under the Manage General Payments title called “General Payment Maintenance.” This tab allows the municipality to add, edit, and delete types of payments not related to utility bills that can be paid by citizens.

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Manage General Payments

General Payments Report General Payments Maintenance

General Payment Maintenance

Create Payment Type

General Payments

| Actions | Title | Description | Department | Amount | Primary Email | Secondary Email | Status | Date |
|---|---------------------------|-------------|-------------------------|--------|---------------------------------|---------------------------------|--------|------------|
| Edit Remove | Additional Refuse Pick Up | 2 | bill.stage.department 2 | 15.00 | billh@diversifiedtechnology.com | billh@diversifiedtechnology.com | Active | 08-29-2023 |
| Edit Remove | Court Fines | 2 | bill.stage.department 2 | 25.00 | billh@diversifiedtechnology.com | billh@diversifiedtechnology.com | Active | 08-29-2023 |
| Edit Remove | Parking Tickets | 2 | bill.stage.department 2 | 25.00 | billh@diversifiedtechnology.com | billh@diversifiedtechnology.com | Active | 08-29-2023 |

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9. **Manage Municipality:** This area allows municipalities to manage municipality users, departments, and the main citizen dashboard of available and activates modules in the Citizen Action Center. It is recommended that you consult with Diversified Technology support to assist you to configure the Manage Dashboard Icons area to avoid any misconfigurations.

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Manage

Manage Staff Manage Departments Manage Dashboard Icons

Manage Staff

Add Staff

Name Email

Staff

| Actions | Full Name | Role | Email |
|---|-----------|---------------------------------------|---------------------------------------|
| Edit Remove | Tyler | Municipality Admin with Propay Portal | tylerk@diversifiedtechnology.com |
| Edit Remove | Bill | Municipality Admin with Propay Portal | billh@diversifiedtechnology.com |
| Edit Remove | NICKC | Municipality Admin with Propay Portal | nickc@diversifiedtechnology.com |
| Edit Remove | KEVIN | Municipality Admin with Propay Portal | billh@diversifiedtechnology.com |
| Edit Remove | Testing | Municipality Admin with Propay Portal | programming@diversifiedtechnology.com |
| Edit Remove | Tom | Municipality Admin with Propay Portal | ttobin@citizenactioncenter.com |

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10. **Frequently Asked Questions:** as the needs and questions are asked that are specific to your municipality, these questions and answers can be set up to assist your utility customers and citizens. A standard list of basic questions and answers are pre-loaded for your municipality and can be changed and new items added easily.

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Manage Frequently Asked Questions

Create FAQ

Frequently Asked Questions

| Actions | Title | Summary | Created On |
|---|--|--------------------------|---------------------|
| Edit Remove | How do I pay my bill? | You can pay your bill... | |
| Edit Remove | why is my bill so high? | An unusually high wa... | |
| Edit Remove | How do I create an account? | To Create an account... | |
| Edit Remove | How do I sign up for automatic payments? | You can sign up for ... | |
| Edit Remove | How do I store a payment Method? | To store a payment m... | |
| Edit Remove | How do I add my Utility account? | To add your utility ... | |
| Edit Remove | Why should I create a Profile instead of doing a Guest Payment? | When a customer crea... | 2024-09-10 15:35:49 |
| Edit Remove | Where can I find my account number, billing name, and zip code? | Customers can find t... | 2024-09-10 15:35:49 |
| Edit Remove | What do I do if I forget my password or am locked out of my account? | If customers forget ... | 2024-09-10 15:35:49 |
| Edit Remove | My autopay did not draft, what now? | Customers might need... | 2024-09-10 15:35:49 |

Rows per page: 10 ▾ 1 - 10 of 12 ◀ Previous Next ▶

11. **Move In Move Out:** Here municipalities can see information on citizens moving in and out of the community as well as export a list of people who are moving out given a chosen time frame. Please consult with Diversified Technology support to configure a form and document to gather the important information you want when citizens move in and out of your service area.

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Into the Community
8

Out Of the Community
15

Within The Community
4

Move In Out

Move Effective Date

Start 10/02/2024 End 11/01/2024

Search Table

| Actions | Customer Name | Contact Phone Number | Contact Email | Account Number | move Effective Date | Move Type | Moving From | Moving To | forwarding Address |
|-------------------|---------------|----------------------|---------------|----------------|---------------------|-----------|-------------|-----------|--------------------|
| No data for table | | | | | | | | | |

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12. **Parking Tickets:** This page allows municipalities to see and manage types of parking tickets as well as search for tickets that have been issued/paid.

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Manage Parking Tickets

Parking Ticket Report Parking Ticket Maintenance

Parking Ticket Report

Parking Tickets

Date Start 10/02/2024 End 11/01/2024

Name Location License Plate Number Penalty Amount

| Actions | Date | Ticket Number | Violation | Issuing Officer | Vehicle | License Plate | Location | Penalty Amount |
|-------------------|------|---------------|-----------|-----------------|---------|---------------|----------|----------------|
| No data for table | | | | | | | | |

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- 13. Payment Transaction Report:** This page shows a report of payment transactions that have been made in the Citizen Action Center. These transactions include all forms of payment made by utility customers and citizens.

unicipality Portal for Bill's Company for Testing 2024-01-30 NEW GUIDE AVAILABLE! → [Help Guide](#)

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All Payments

Date: Payment Amount: Customer Number: Transaction Id: Reference:

Payment Type: Payment Status:

Customers Payments

| Actions | Date | Transaction ID | Reference | Customer Number | Customer Name | Amount | Payment Method | Payment Status | Processor Response |
|-------------------------------|--------------------|----------------|--|-----------------|---------------------|-----------|----------------|----------------|--------------------|
| Print Receipt | 12/10/2024 4:53 PM | 1535 | Online Utility Portal/0935 | 0935 | CLIFFORD BURKEY | \$287.44 | Credit Card | Successful | SUCCESS |
| Print Receipt | 12/10/2024 4:52 PM | 1533 | Online Utility Portal/0896 | 0896 | JAMES DOUGLAS JR | \$293.14 | Credit Card | Successful | SUCCESS |
| Print Receipt | 12/10/2024 4:48 PM | 1525 | Online Multi Payment/0140/0154/0590/0667/0877/0901/0918/0959/1007/1009 | 1007 | MICHAEL BELLIGIA JR | \$75.50 | Credit Card | Successful | SUCCESS |
| Print Receipt | 12/10/2024 4:48 PM | 1525 | Online Multi Payment/0140/0154/0590/0667/0877/0901/0918/0959/1007/1009 | 1009 | CURT THOMAS | \$1892.30 | Credit Card | Successful | SUCCESS |
| Print Receipt | 12/10/2024 4:48 PM | 1525 | Online Multi Payment/0140/0154/0590/0667/0877/0901/0918/0959/1007/1009 | 0918 | JAMES GREGORY | \$388.36 | Credit Card | Successful | SUCCESS |
| Print Receipt | 12/10/2024 4:48 PM | 1525 | Online Multi Payment/0140/0154/0590/0667/0877/0901/0918/0959/1007/1009 | 0959 | BARRY SCHEPS | \$190.08 | Credit Card | Successful | SUCCESS |

- 14. Processor Reports:** This is what used to be the Propay Single Sign On, this allows you to search for transactions on Propay as well as void/refund payments as needed without needing to log into a different site.

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Processor Reports

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Propay Single Sign On

Account Selection:

Report Selection:

- 15. Registration Reports:** Here you can see people who have registered their household, business, and/or rentals on the Citizen Action Center. Below the counts, there is a drop-down selection to choose which area is to be shown in the listing. A CSV button on the right side to download the records shown in the listing.

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Registration

Total Households
9
(Total Household Members: 10)

Total Businesses
6

Total Rentals
6

Registration Type
Household

Registrations

| Name | Service Address | City | State | Zip |
|----------------------|------------------|----------|-------|-------|
| Gavin Heintzelman | 95 E 10th | Utopia | PA | 17815 |
| Gideon Heintzelman | 95 E 10th | Utopia | PA | 17815 |
| Kristina Heintzelman | 95 E 10th | Utopia | PA | 17815 |
| Maralyn Monroe | 95 E 10th Street | Milville | PA | 17815 |
| Tom Tobin | 95 E 10th Street | Milville | PA | 17815 |

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16. Resource Rental Report: in addition to showing on the Schedule menu, this module allows you to see citizens who are reserving and/or renting resources.

The selection criteria has a date range and selection of one or all resources in addition to a CSV button on the right side to download the selected records.

There is a button called “Calendar View” which is directly under the Manage Resources title to allow a view of the calendar. There is also a button for “Resource Rental Maintenance” to allow each rental, resource, location to be established for citizens. The resource can be configured to require payment or allow a free reservation as needed.

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Manage Resources

Resource Rental Report
Calendar View
Resource Rental Maintenance

Resource Rental Report

Date
Start 10/02/2024
End 11/01/2024

Resource Selection
All

Create Reservation

Resource Rentals

| Actions | Resource | Renter Name | Renter Email | Renter Phone | Rental Begin Date | Rental End Date |
|-------------|----------------------|-------------|----------------------------------|----------------|--------------------|--------------------|
| Edit Remove | Lake Drive Pavilion | Tobin | ttobin@diversifiedtechnology.com | (570) 245-0050 | 10/8/2024 8:00 AM | 10/9/2024 5:00 PM |
| Edit Remove | City Conference Room | Tom Tobin | ttobin@diversifiedtechnology.com | (570) 245-0050 | 10/8/2024 8:00 AM | 10/9/2024 12:00 PM |
| Edit Remove | Sunset Pavilion | Tom Tobin | ttobin@diversifiedtechnology.com | (570) 245-0050 | 10/11/2024 8:00 AM | 10/11/2024 5:00 PM |

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17. Work Orders: This module shows Work Orders, as well as Permits and Inspections which can be selected with custom forms included in the Forms and Document module as well.

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Work Orders

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To Do

Done

Sort by: Priority ▾

Status

Open

Completed

Appointment Date

Priority

ID Number

Assigned to

Ⓢ

Description

Completed By

Completed Notes

Customer

Address

Phone Number

18. My Profile: This option allows the currently logged in municipality user to update their Profile information when needed.

X

Edit Profile

First Name

Testing

Last Name

Business Address

City

STATE

Zip

Business Email

programming@diversifiedtechnology.com

Business Cell Phone

9193355929

Save

11