



Notice Processing

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Notice Processing



Notice Processing

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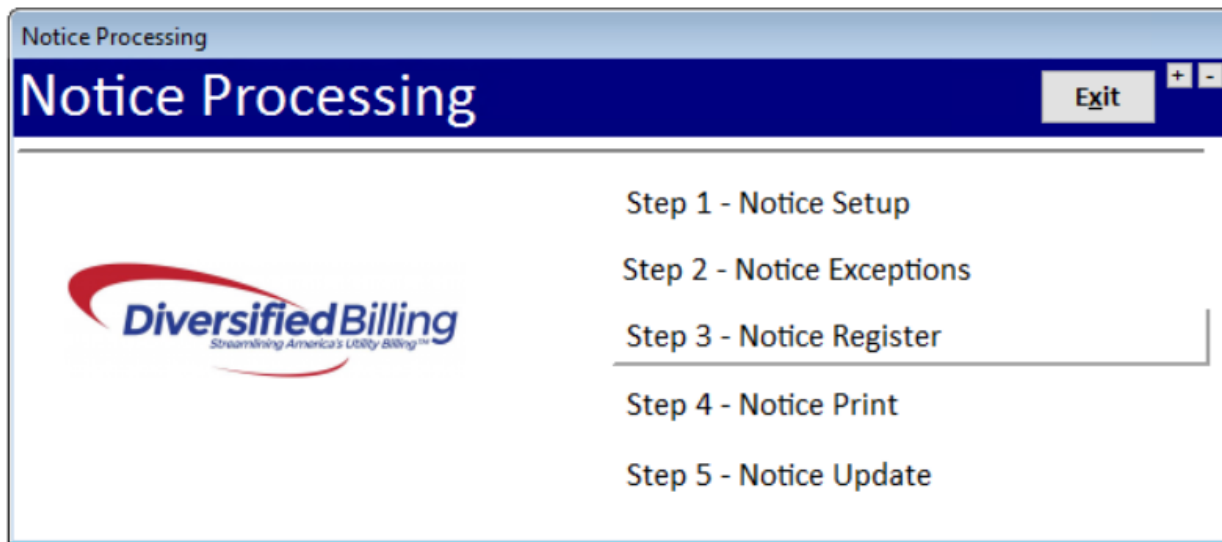
Notice Processing

The **Notice Processing** option will allow you to establish the criteria for sending notices to customers with past due amounts, as well as identifying customers who will be exempted from this process. You will be able to filter the customers by billing due dates.

To access this option, you can do the following:

1. Select the Notices icon from the landing page or the option from the Processing Menu Toolbar

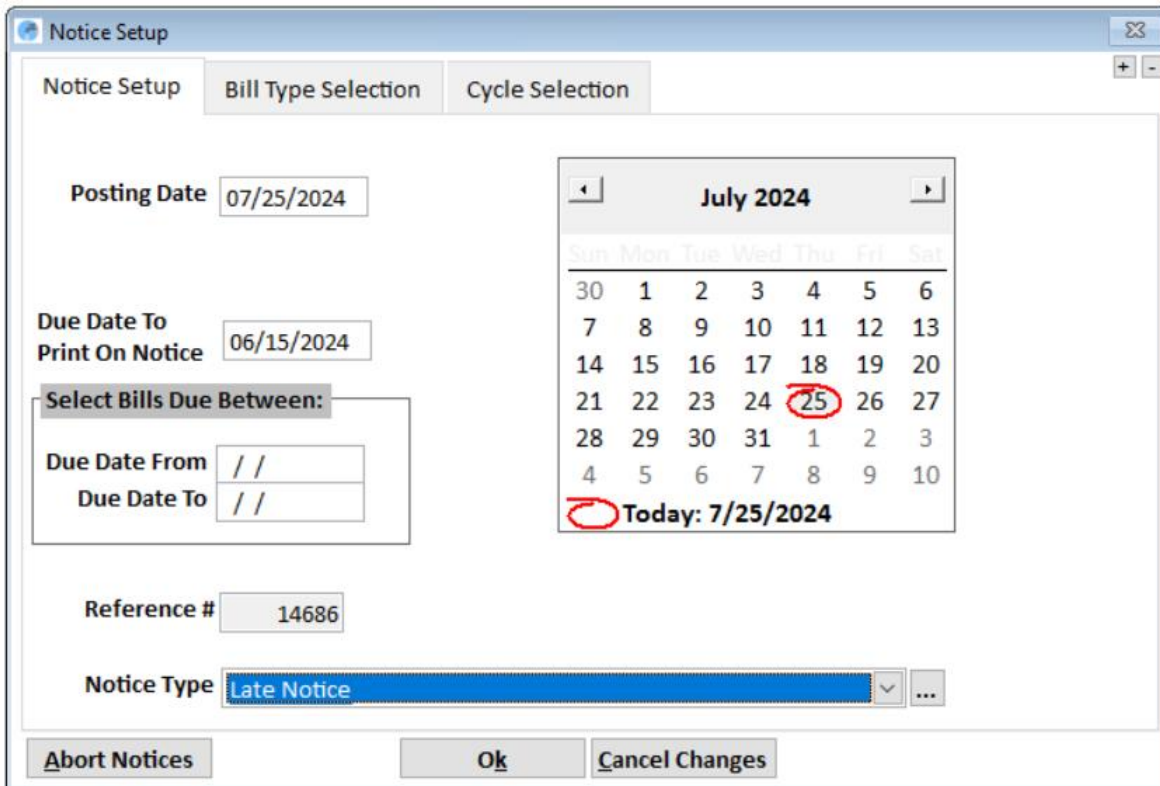
The **Notice Processing** will have the step feature to help you walk through the creation of a notice process. As each step is completed, a checkmark will appear in front of the option indicating that you have accessed this option, or it is completed.



Step 1 – Job Setup

In the **Notice Setup**, you will be able to establish the year and period in which the customer will be selected for sending a notice.

Notice Setup Tab



The screenshot shows the 'Notice Setup' window with the following fields and controls:

- Posting Date:** 07/25/2024
- Due Date To Print On Notice:** 06/15/2024
- Select Bills Due Between:**
 - Due Date From:** / /
 - Due Date To:** / /
- Calendar:** A calendar for July 2024. The date 25 is circled in red. Below the calendar, it says 'Today: 7/25/2024' with a red circle around the word 'Today'.
- Reference #:** 14686
- Notice Type:** Late Notice (selected from a dropdown menu)
- Buttons:** Abort Notices, Ok, Cancel Changes

The available fields on this screen are:

- **Posting Date** – the date the notice is posted to the accounts.
- **Due Date To Print On Notice**– the date when the payment is due is then printed on the notice when applicable.
- **Select Bills Due Between** – record selection method using various Due Dates
 - **Due Date From** – the beginning billing due date that will be used for selecting customers
 - **Due Date To** – the ending billing due date that will be used for selecting customers. This date field **must be completed** in order to select customers. This date is the due date for your last billing to which you want to send notices to customers who have not paid yet.

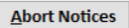
Notice Processing

- **Reference Number** – a system generated number that can be used for tracking the billing adjustment batch process
- **Notice Type** – a drop down is available to identify type of notice that will be sent to the customer

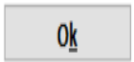
The available buttons on this screen are:



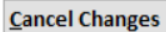
Ellipse Button – will allow you to modify or create a Notice Type that will be sent to the customers



Abort Notices – will allow you cancel the setup for this notice batch process



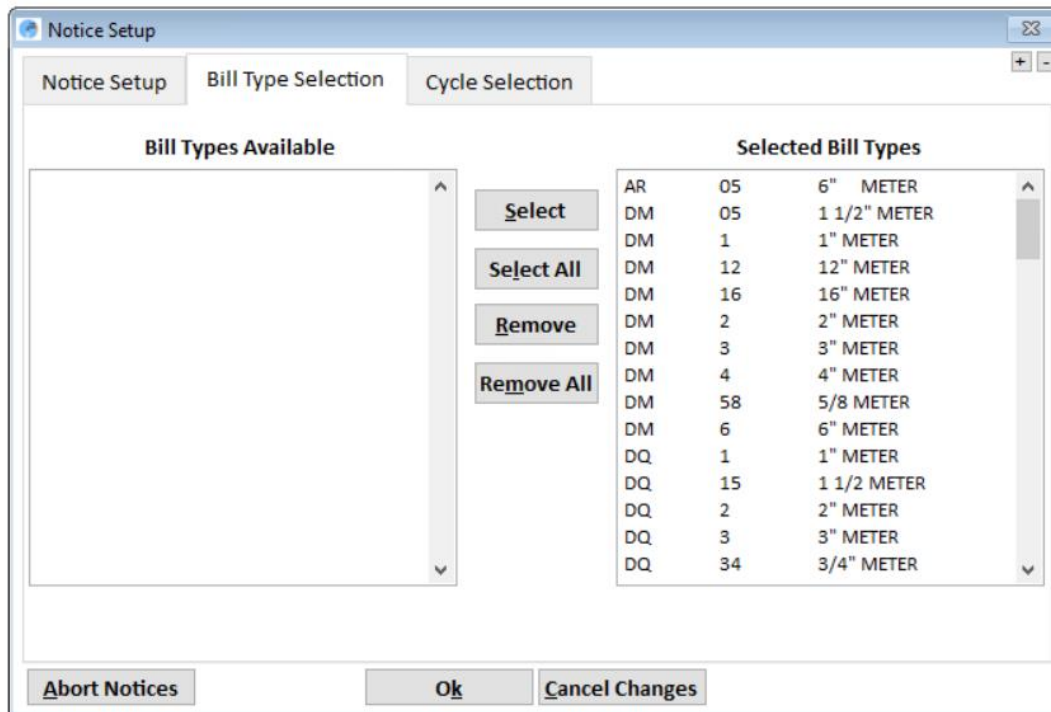
OK – will save the **Notice Processing** setup information



Cancel Changes – will cancel the changes and send you back to step 1.

Bill Type Selection Tab

The **Billing Type Selection** tab will allow you to define which services will be used to generate the notices.



Notice Setup | **Bill Type Selection** | Cycle Selection

Bill Types Available

Selected Bill Types

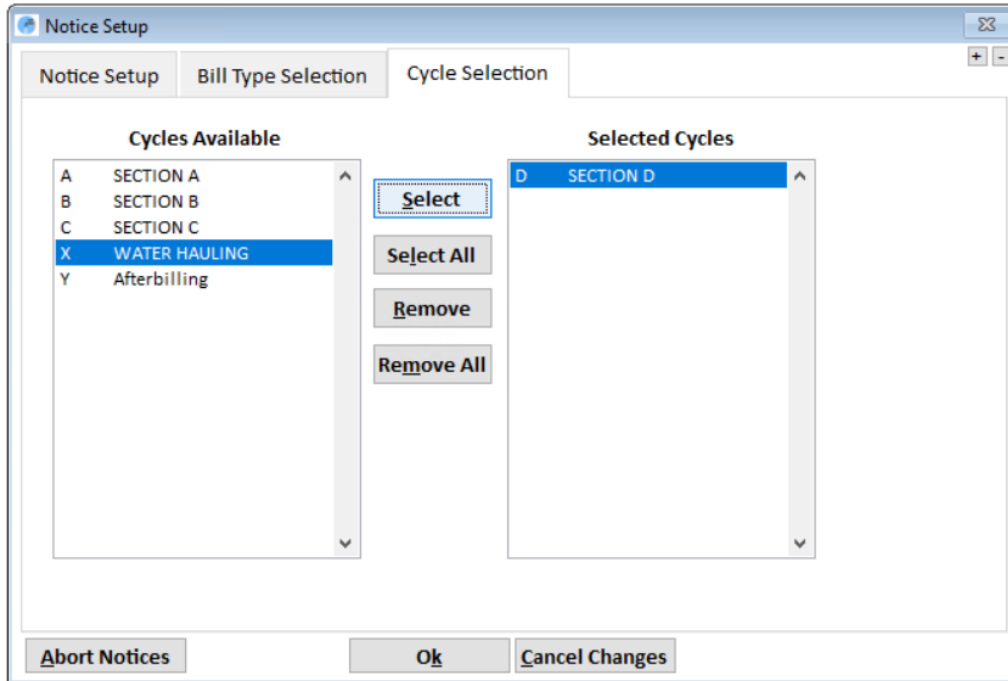
AR	05	6" METER
DM	05	1 1/2" METER
DM	1	1" METER
DM	12	12" METER
DM	16	16" METER
DM	2	2" METER
DM	3	3" METER
DM	4	4" METER
DM	58	5/8 METER
DM	6	6" METER
DQ	1	1" METER
DQ	15	1 1/2 METER
DQ	2	2" METER
DQ	3	3" METER
DQ	34	3/4" METER

Buttons: Select, Select All, Remove, Remove All

Bottom Buttons: Abort Notices, Ok, Cancel Changes

Cycle Selection Tab

With the **Cycle Selection** tab, you will be able to select the specific billing cycle to include in this notice process. If you only have one billing cycle, this tab information does not need to be completed.



The image shows a software window titled "Notice Setup" with three tabs: "Notice 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. In the "Cycles Available" list, "X WATER HAULING" is selected. In the "Selected Cycles" list, "D SECTION D" is selected. Between the lists are four buttons: "Select", "Select All", "Remove", and "Remove All". At the bottom of the window are three buttons: "Abort Notices", "Ok", and "Cancel Changes".

Cycles Available	
A	SECTION A
B	SECTION B
C	SECTION C
X	WATER HAULING
Y	Afterbilling

Buttons: **Select**, **Select All**, **Remove**, **Remove All**

Selected Cycles	
D	SECTION D

Buttons: **Abort Notices**, **Ok**, **Cancel Changes**



Notice Processing

Notice Type

If you need to define or maintain a **Notice Type**, you can click on the **Ellipse** button which is located to the right of the **Notice Type** field. The **Notice Type** will be used to establish the information that will appear in your late notices. Additional tabs are Custom Fields and Messages.

Notice Forms Setup

Setup Custom Fields Message

Description: Late Notice

Register Program: midland_noticecalc20 Print Program: midland_noticeprn20 Ver. 2

Update Program: Report Name: midland_latenotice

Notice Fee: 0.00 Transaction Code:

Notice Income GL# FTP Prefix:

Minimum Amount: 100.00

Calculation Method: 2 1 = Compare the Minimum Amount to the Total Balance on the Account.
2 = Compare the Minimum Amount to the Balance from the Job Setup Screen.
Method 2 will use the From/To Due Dates, and the Bill Type/Cycle Selections.

Update Notes: ☒

Export to File:

Notice Form Printer: ...

Version 2 Notice Calc: ☒

Exclude Non Billable Customers: ☒

Exclude Payplan Customers: ☐

Exclude ACH Customers: ☒

Include Unposted C.C. Payments: ☐

Exclude Services With A Credit: ☒ These two options will exclude a service with a credit, or an entire customer with a credit, due to unapplied credits.

Exclude Customers With A Credit: ☒

Print Notice For: CustAddr(Owner/Tenant Screen)

Notice Fee Posting Order:

(Bill Types separated by a comma. (Example: WT,SW))

Must Have Received a:

In The Last: 0 Days

Email Subject:

New Notice Save Cancel Exit Delete Notice



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Notice Forms Setup Tab

The **Notice Type** setup is a set of three tabs which will contain various fields and information that can be placed on the notices.

The available fields in the **Notice Setup Tab** are:

- **Description** – a description that will be used to identify a notice type
- **Register Program** – the program that is used to generate the register report for the notices
- **Print Program** – the program that is used for updating the customer's account information when a notice is sent
- **Report Program** – the program that will be used for printing the notices. An Ellipse button is available for modifying the form program as needed.
- **Notice Fee** – a field to contain an amount that can be attached to the notice process
- **Transaction Type** – a code that identifies the transaction that will be used in the notice calculation
- **Notice Income GL Number** – a general ledger accounting code that identifies the account that will track the income from the notice fee
- **FTP Prefix** – this applies to print and mail customers for sending the notice print file to the ftp site for processing.
- **Minimum Amount** – a dollar amount that will be the base amount for determining which customers will receive a notice. Any customer with a balance below this amount will be excluded from the process.
- **Calculation Method** – an indicator that will determine how the notices will be calculated. A drop down is available for making a selection. The available options are:
 - **1 – Total Balance**
 - **2 – Amount Selected in Setup**
- **Update Notes** – a checkbox that indicates that the customer's notes will be updated during this process with a note to indicate a notice was sent
- **Export File** – the name and location if the notices are to be exported to another program
- **Notice Form Printer** – the name of the printer that will print the notices. An Ellipse button is available for selecting the printer
- **Version 2 Notice Calc:** this must be checked for all new notice setup
- **Exclude Non Billable Customers:** exclude any non billable customer
- **Exclude Payplan Customers:** exclude customers who are current on a payment plan.
- **Exclude ACH Customers:** exclude customers who have applied for payments to be processed via ACH.
- **Include Unposted C.C. Payments:** include credit card payments that have not been posted to the customers' accounts.
- **Exclude Services With A Credit:** exclude services with a credit balance
- **Exclude Customers With A Credit:** exclude customers with a credit balance
- **Print Notice For:** in this drop-down, you can be specific on
- **Notice Fee Posting Order:** this looks for the services that you want to apply the fee to

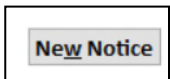


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- **Must Have Received a:** in this drop-down, you can select if a previous notice needs to be sent before this notice.
- **In The Last:** must have received a notice in the last number of days required.
- **Email Subject:** if the notice is being sent via email the subject for the email is placed here.

You will be able to complete the above fields as needed for making modifications to an existing notice or for creating a new notice.

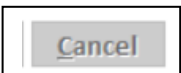
The available buttons on this screen are:



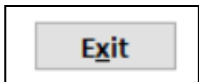
New Notice – will refresh the **Notices Form Setup** window to allow for entry of a new delinquent notice



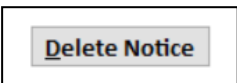
Save – will save any new or modified information for a notice type



Cancel – will cancel any new or modified information on the notice type



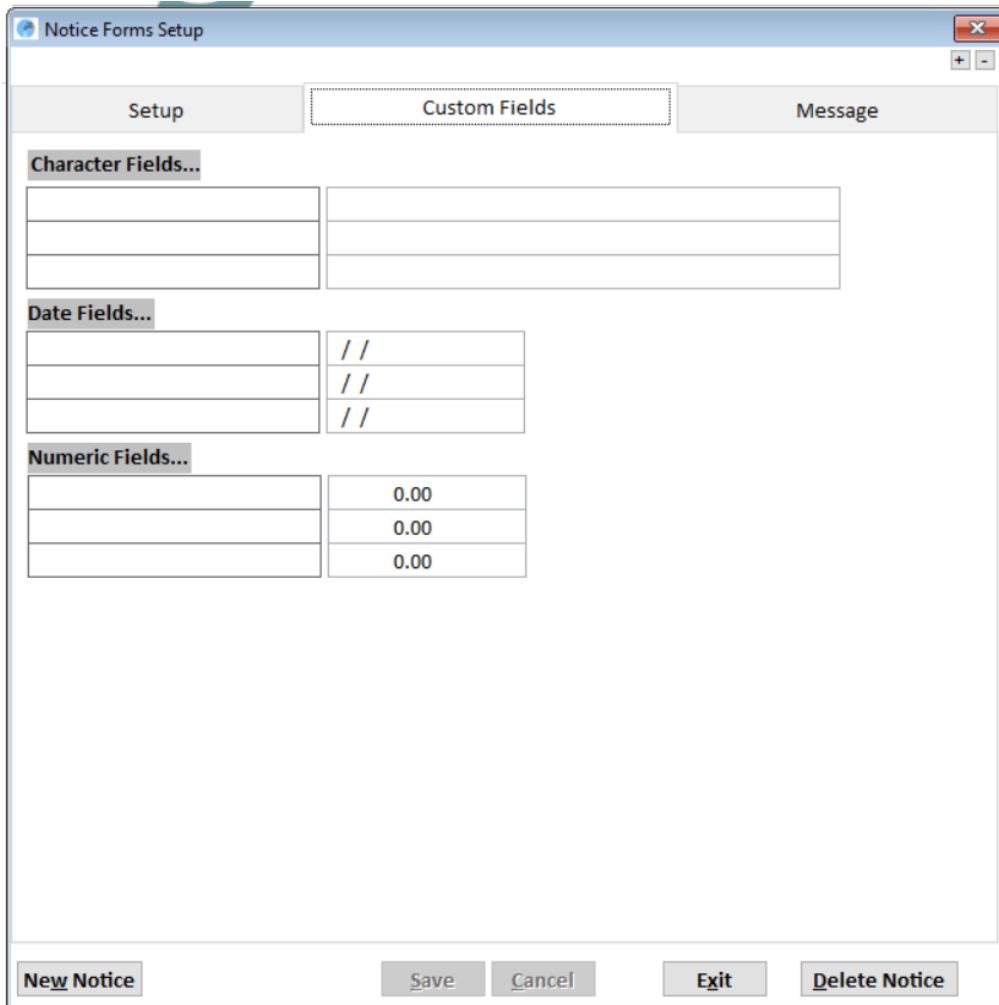
Exit – will return you to the **Notice Setup** window



Delete Notice – will delete the selected notice type

Custom Fields

In the **Custom Fields** tab, you will be able to determine custom fields that can be used in the notice itself. These Custom Fields will allow you to create any character, date or numeric field that will give the customer more information on the notice.



The screenshot shows the 'Notice Forms Setup' window with the 'Custom Fields' tab selected. The window has three tabs: 'Setup', 'Custom Fields', and 'Message'. The 'Custom Fields' tab contains three sections: 'Character Fields...', 'Date Fields...', and 'Numeric Fields...'. Each section has a table with two columns for defining custom fields.

Character Fields...	

Date Fields...	
	//
	//
	//

Numeric Fields...	
	0.00
	0.00
	0.00

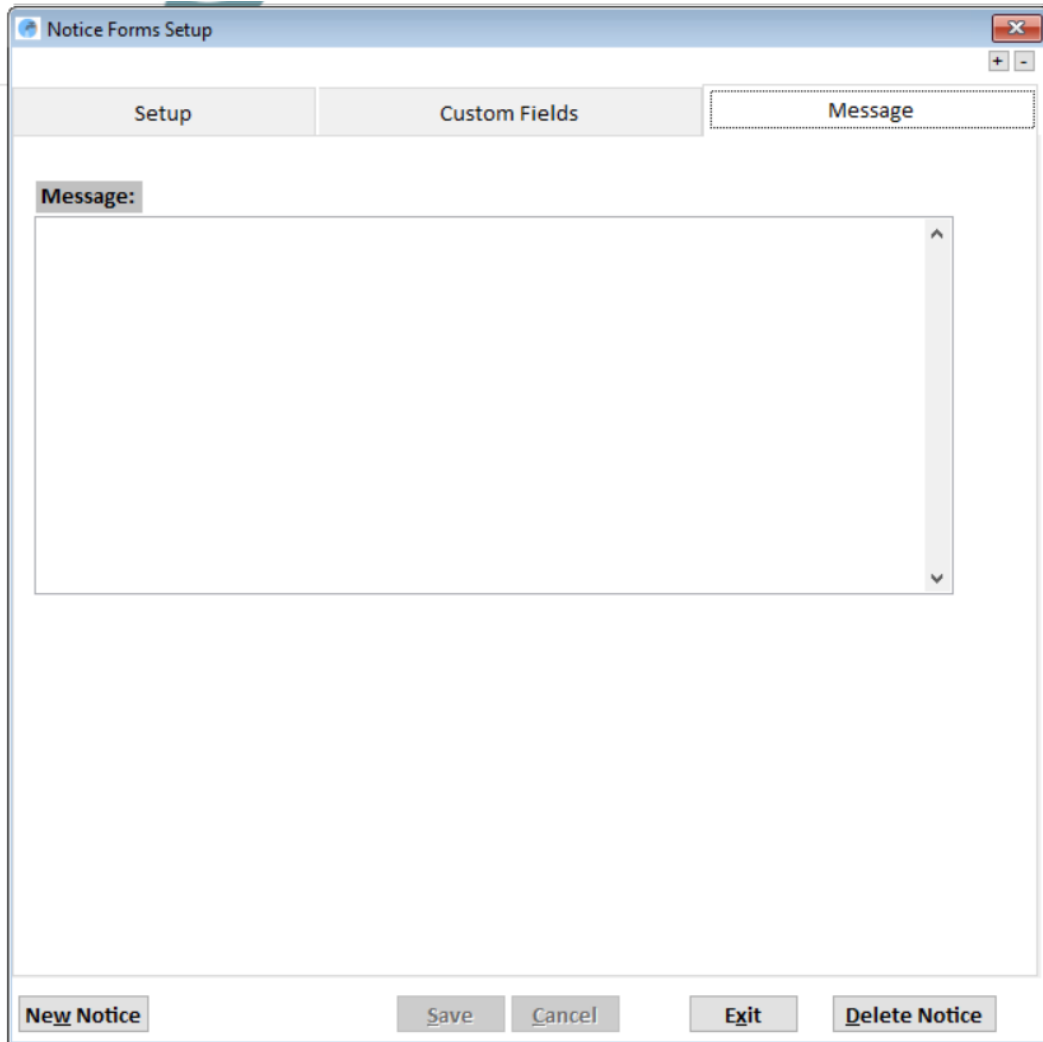
At the bottom of the window, there are five buttons: 'New Notice', 'Save', 'Cancel', 'Exit', and 'Delete Notice'.

The available fields on this tab are:

- **Character Fields** – three sets of two fields each to contain the label and the information that can appear on the customer's delinquent notices
- **Date Fields** – three sets of two fields each to contain the label and date information that can appear on the customer's delinquent notices
- **Numeric Fields** – three sets of two fields each to contain the label and a numeric value that can appear on the customer's delinquent notices

Message Tab

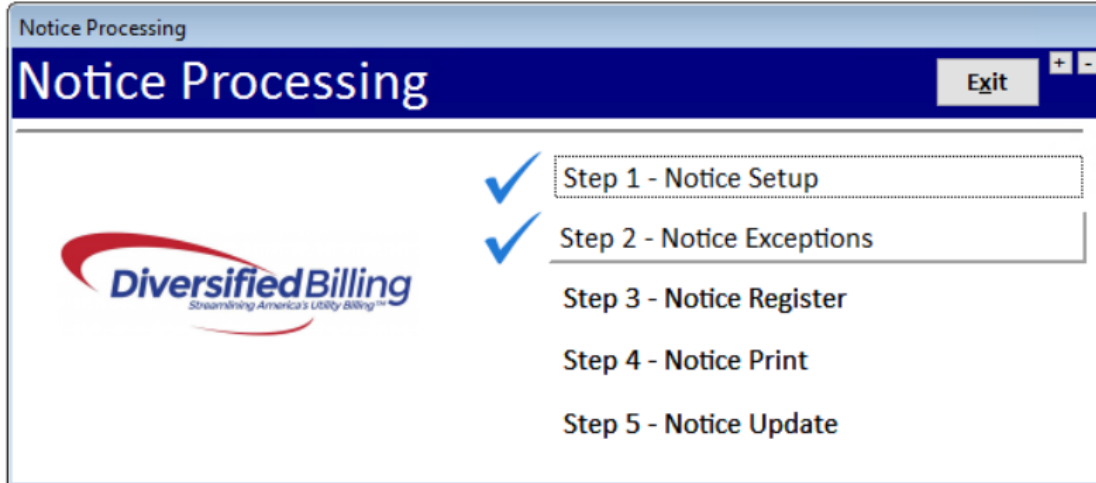
The **Message Tab** is a freeform area for typing a delinquent notice that will appear on the notices to the customers. The delinquent message length will be determined by the amount of space that is available on the notice.

A screenshot of the 'Notice Forms Setup' dialog box. The dialog has a title bar with a close button and a maximize button. It contains three tabs: 'Setup', 'Custom Fields', and 'Message'. The 'Message' tab is selected. Inside the 'Message' tab, there is a label 'Message:' followed by a large, empty text area with a vertical scrollbar. At the bottom of the dialog, there are five buttons: 'New Notice', 'Save', 'Cancel', 'Exit', and 'Delete Notice'.

To save the **Notice Type**, you can click on the **Save** button. To return to the **Notice Setup**, you can click on the **Exit** button.

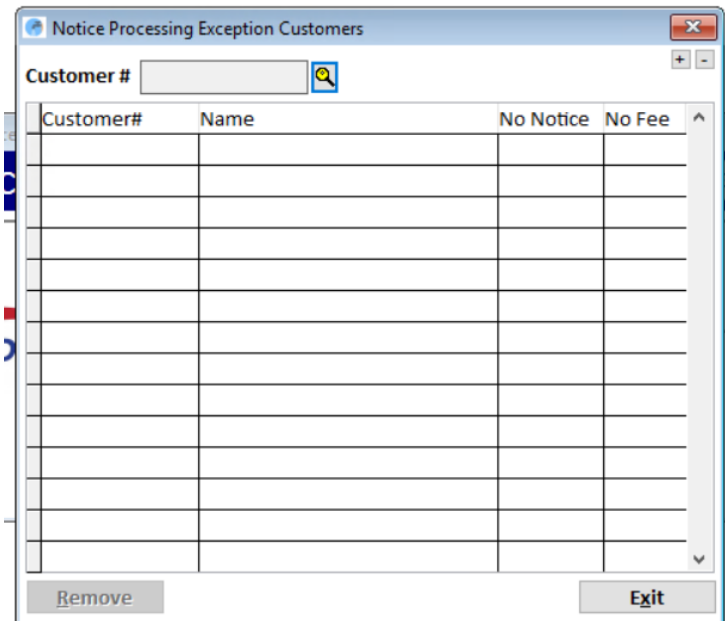
Step 2 – Notice Exceptions

With **Step 2- Notice Exceptions**, you will be able to select the customer(s) that will be exempt from receiving a delinquent notice. This is an optional step. You may want to review the Notice Register in Step 3, before entering exemption in this step.



The **Notice Processing Exception Customers** dialog box will be displayed when step 2 is selected.

In this screen, you can locate and add a customer who will not receive the delinquent notice.





Notice Processing

Customer Search

The **Notice Exceptions Customer Search** window will be displayed when you click on the **Magnifying Glass** icon.

The screenshot shows the 'Notice Exceptions Customer Search' window. It has a search bar at the top with a magnifying glass icon and a 'Reference/Check # Search:' field. Below the search bar is a table with columns: Customer #, Name, Service Address, Balance Due, Tax Map #, and Address 1. The table contains several rows of customer data. At the bottom of the window are buttons for 'Print', 'Preview', 'Save', 'Email', 'Export', and 'Select'.

Customer #	Name	Service Address	Balance Due	Tax Map #	Address 1
1000-01	MIDLAND SEWAGE PLANT	WEST END	330.00		946 RAILROAD AVE
1001-01	CONSOLIDATED RAIL CORP	WEST END	41.51		P.O. BOX 8499
1001-01	NORFOLK SOUTHERN, MAIL STOP	WEST END	41.51		P.O. BOX 5651
1002-01	ELITE GASFIELD SERVICES, LLC	180 W. MIDLAND AVENUE	0.00		180 W. MIDLAND AVE
1003-01	ELITE GASFIELD SERVICES, LLC	180 W. MIDLAND AVENUE	0.00	33-001-0117	1000 3RD STREET
1004-01	JOHN SAMBOL, JR.	156 W. MIDLAND AVENUE	0.00		142 UNION LANE
1004-01	DIANA QUINTANA	156 W. MIDLAND AVENUE	0.00		156 W. MIDLAND AVE
1004-02	THOMAS QUINTANA, SR	156 W. MIDLAND AVENUE	0.00	33-002-0167	156 W. MIDLAND AVE
1005-01	JOHN SAMBOL, JR.	154 W. MIDLAND AVENUE	1240.50		142 UNION LANE
1005-01	JOHN SAMBOL, JR. TENANT	154 W. MIDLAND AVENUE	1240.50		154 W. MIDLAND AVE
1005-02	THOMASJOSEPHINE QUINTANA	154 W. MIDLAND AVENUE	0.00	33-002-0167	156 W. MIDLAND AVE
1005-02	MICHAEL QUINTANA	154 W. MIDLAND AVENUE	0.00	33-002-0167	154 W. MIDLAND AVE
1005-03	GARY M. KIRKPATRICK	154 W. MIDLAND AVENUE	0.00	33-002-0167	154 W. MIDLAND AVE
1005-03	JOHN SAMBOL, JR.	154 W. MIDLAND AVENUE	0.00	33-002-0167	142 UNION LANE
1006-01	SLEEPY HOLLOW REAL ESTATE	150 W. MIDLAND AVENUE	0.00		11811 GASTON ROA
1006-01	SLEEPY HOLLOW REAL ESTATE	150 W. MIDLAND AVENUE	0.00		11811 GASTON ROA
1006-02	PROPERTY MANAGER MASTERS	150 W. MIDLAND AVENUE	0.00		PO BOX 11033

When the customer is located, you can click on the **Enter** key on your keyboard or click on the **Select** button to access the **Notice Processing Exceptions Customers** window.

The screenshot shows the 'Notice Processing Exception Customers' window. It has a 'Customer #' field with the value '1000-01' and a magnifying glass icon. Below the field is a table with columns: Customer#, Name, No Notice, and No Fee. The table contains one row of data for customer 1000-01. At the bottom of the window are buttons for 'Remove' and 'Exit'.

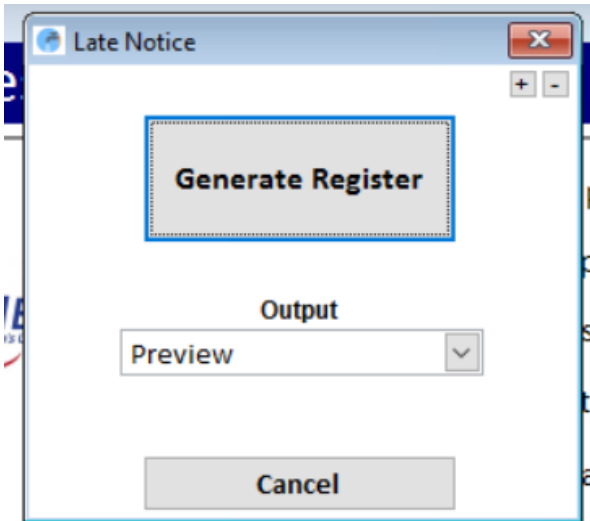
Customer#	Name	No Notice	No Fee
1000-01	MIDLAND SEWAGE PLANT	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

To return to the **Notice Processing** screen, click on the **Exit** button.

Step 3 – Notice Register

The **Notice Register** step will allow you to view and print the Notice Register report that will list the customer(s) to receive a delinquent notice.

When the **Generate Register** button is clicked, the System will generate the **Past Due Register** which will list all the customers who will receive a delinquent notice.



Past Due Register

The **Past Due Register** report will detail the customer information that will receive a delinquent notice. The available information on this report is:

- **Customer Number** – the customer's account number
- **Name** – the customer's name if an individual customer or a company's name if a commercial account
- **Service Address** – the address to which services are provided
- **Balance Due** – the amount that is currently delinquent
- **Notice Fee** – the fee amount for sending the notice
- **Total Due** – the balance due plus the notice fee total



Notice Processing

Posting Date 07/25/2024
Ref # 14686

Diversified Technology - Midland Late Notice Register

Run Date 07/25/2024 Page 1
Run Time 08:01:55

Customer #	Name/Service Address	Selected Balance	Current Balance	Past Due Balance	Total Balance	Last Paid Date	Last Paid Amount	Notice Fee
7000-02	MIDLAND HEIGHTS CIRCLE MIDLAND HEIGHTS	15,524.65	14,221.09	15,524.65	29,745.74	06/18/2024	13,986.18	
7001-01	MIDCREST HOMES MIDLAND HEIGHTS	1,855.18	4,800.59	1,855.18	6,655.77	06/11/2024	3,914.43	
7008-01	CORAK TOWERS 500 BEAVER AVENUE	4,260.70	3,632.17	4,260.70	7,892.87	06/11/2024	1,572.92	
7012-01	LINCOLN PARK PERFORMING ONE LINCOLN PARK	1,954.62	1,689.89	1,954.62	3,644.51	06/11/2024	1,689.89	
7020-02	MIDLAND APARTMENTS 1033 - 1043 MIDLAND	11,364.57	1,102.88	11,364.57	12,467.45	05/21/2024	7,943.67	
7021-02	MIDLAND APARTMENTS 1059 - 1069 MIDLAND	3,259.37	1,020.58	3,259.37	4,279.95	05/21/2024	1,600.00	
7022-02	SNOWY WHITE 1100 MIDLAND AVENUE	827.94	839.46	827.94	1,667.40	06/19/2024	1,235.41	
7023-02	LINCOLN LEARNING 13TH STREET	371.61	430.70	371.61	802.31	06/07/2024	495.65	
7024-01	WATCO TRANSLOADING 18 - 12th STREET	152.27	362.18	152.27	514.45	06/11/2024	137.17	
7025-01	MPLX TERMINALS LLC MIDLAND AVENUE	724.24	724.24	724.24	1,448.48	06/16/2024	724.24	

Notice Exception Register

The **Notice Exception Register** report will detail the customer information that is excluded from receiving the notice.

Posting Date 07/25/2024
Ref # 14686

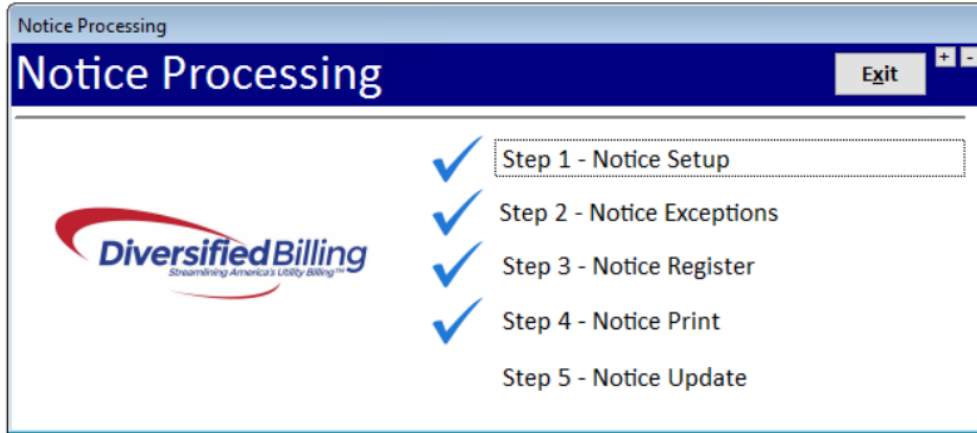
Diversified Technology - Midland Notice Exception Register

Run Date 07/25/2024 Page 1
Run Time 08:13:22

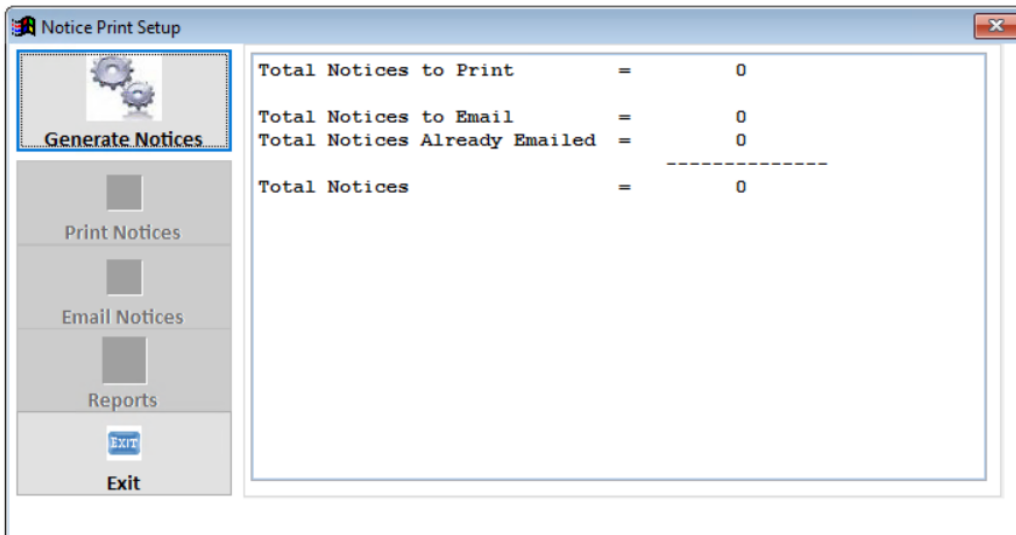
Customer #	Name
1000-01	MIDLAND SEWAGE PLANT

Step 4 – Notice Print

The **Step 4 – Notice Print** will print the delinquent notices as determine in the previous steps.

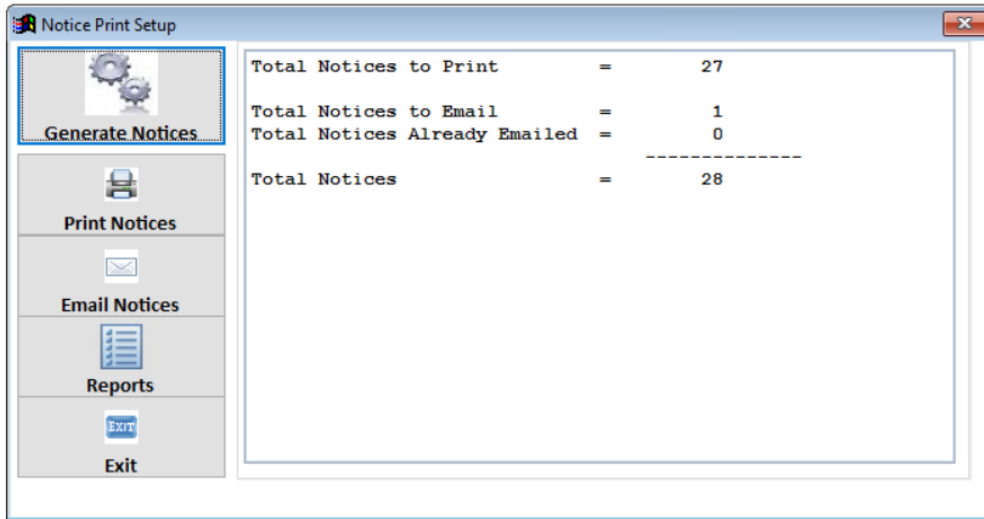


The **Notice Print Setup** dialog box will be displayed. From this, you will be able to view and/or print the delinquent notices.



Notice Processing

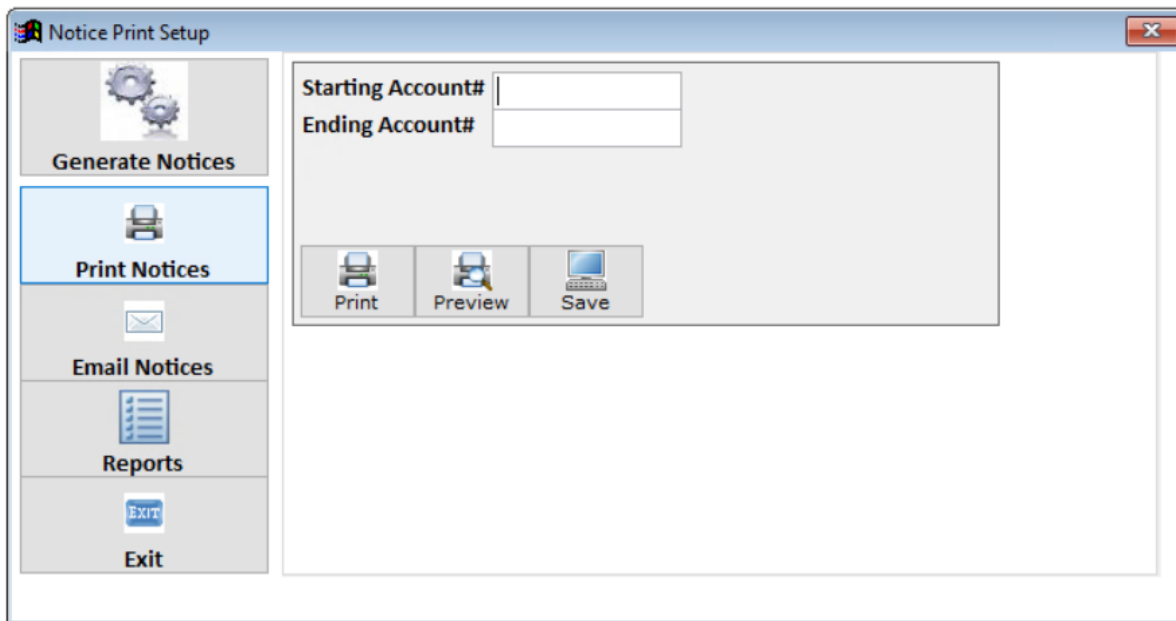
Generate Notices - Next you will select the generate notices button. This will create the notices and will tell you how many notices you have to print or email.



The 'Notice Print Setup' window displays a summary of notices. On the left is a sidebar with buttons: 'Generate Notices' (selected), 'Print Notices', 'Email Notices', 'Reports', and 'Exit'. The main area shows the following statistics:

Total Notices to Print	=	27
Total Notices to Email	=	1
Total Notices Already Emailed	=	0
<hr/>		
Total Notices	=	28

Print Notices – When selecting the print notices button the notices to be printed will be displayed. This will not show you the notices to be emailed.



The 'Notice Print Setup' window displays options for printing notices. The sidebar on the left has 'Print Notices' selected. The main area contains two input fields: 'Starting Account#' and 'Ending Account#'. Below these fields are three buttons: 'Print', 'Preview', and 'Save'.

The available fields on this screen are:

- **Print** – this button will bring up the Windows printer box to choose what printer to send the notices to.
- **Preview** – will display the notices for review.



Notice Processing

- **Save** – this will save the notices creating a PDF of them.
- **Starting Acct#** - the starting account number when you would like to print just a range of notices
- **Ending Acct#** - the ending account number in the range of accounts for printing notices

Municipal Authority - Borough of Midland
PO Box 919
Bloomsburg, PA 17815

JULY 25, 2024



MIDLAND HEIGHTS CIRCLE
100 MIDLAND HEIGHTS
MIDLAND, PA 15059

RE: Account #:
7000-02

Service Address:
MIDLAND HEIGHTS

Amount Overdue: **\$15,524.65**

Pay by Automated Phone at (866) 656-0677

Phone Payment ID **3085**

Phone Payment Pin **3381**

Pay online at: paymidlandutility.com

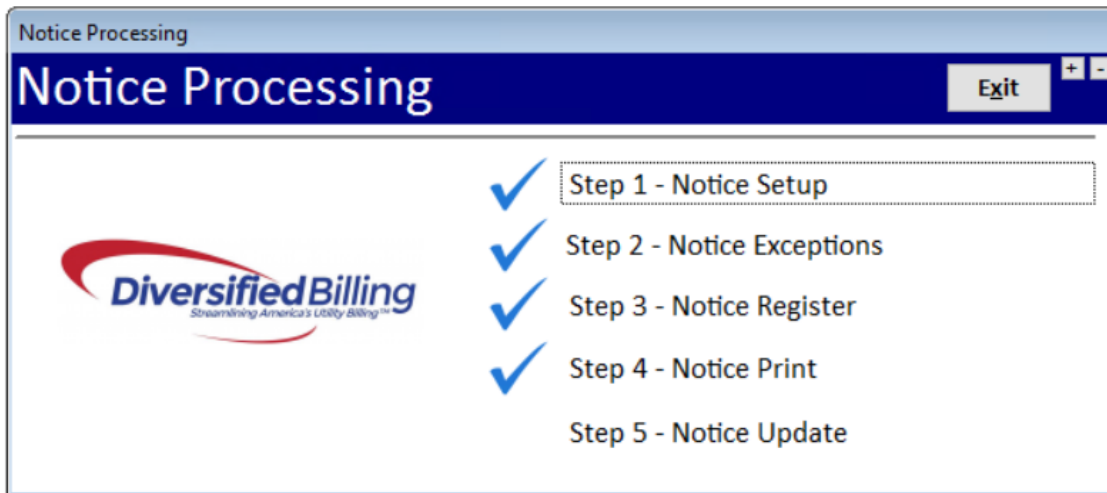


Dear Customer:

It is urgent that you contact us immediately concerning the overdue amount on your account of **\$15524.65**.

Step 5 –Notice Update

With **Step 5 –Notice Update** option, you will be able to update the customer's balances and transactions with the notice fees. You should only run this step when you have validated the notice fee amounts to ensure that they are correct. The notice transactions will not be posted to the accounts until this step has been completed.



When the **Notice Update** option is selected, the **Notice Update** dialog box will be displayed. The prompt will display a message about updating the files with the notice information from the Notice Register.

After you have validated the information, you can click on the **Update** button. The System will update the customers' account information; post the notice transactions, etc.

The **Cancel** will return you to the **Notice Processing** menu without posting the transactions.

When the update has been completed, you will receive another prompt indicating that the update has been completed. You can click on the **OK** to return to the **Notice Processing Menu**.

