



Customer Reports

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# Customer Reports



## Customer Reports

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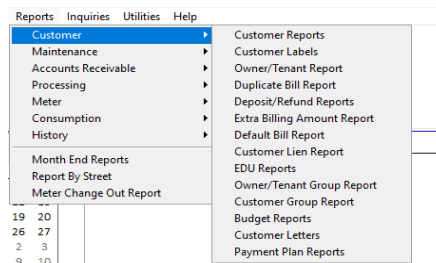
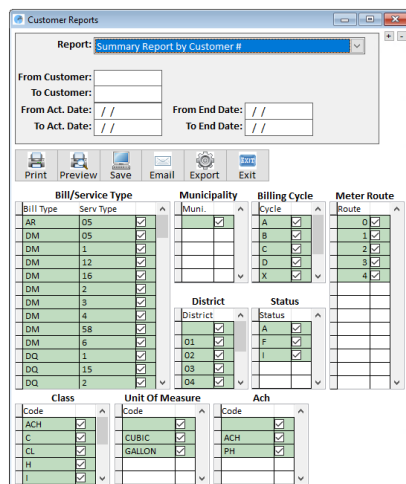
## Customer Reports Tab

The **Customer Reports Tab** will allow you to view reports based on customers and customer-related data.

To access this list of reports, click on the **Reports** tab at the top of the ribbon or through the icon on the landing page.

The available options include

- **Customer Reports**
- **Customer Labels**
- **Owner/Tenant Report**
- **Duplicate Bill Report**
- **Deposit/Refund Report**
- **Extra Billing Amount Report**
- **Default Bill Amount**
- **Customer Lien Report**
- **Edu Report**
- **Budget Reports**
- **Customer Letters**
- **Payment Plan Reports**

The screenshot shows the 'Customer Reports' window with the 'Summary Report by Customer #' selected. It includes fields for 'From Customer:', 'To Customer:', 'From Act. Date:', and 'To Act. Date:'. Below these are buttons for 'Print', 'Preview', 'Save', 'Email', 'Export', and 'Exit'. The main area contains several filter sections: 'Bill/Service Type' (with columns for Bill Type, Serv Type, and checkboxes), 'Municipality' (with a dropdown and checkboxes), 'Billing Cycle' (with a dropdown and checkboxes), 'Meter Route' (with a dropdown and checkboxes), 'District' (with a dropdown and checkboxes), 'Status' (with a dropdown and checkboxes), 'Class' (with a dropdown and checkboxes), 'Unit Of Measure' (with a dropdown and checkboxes), and 'Ach' (with a dropdown and checkboxes).

## Customer Reports

The **Customer Reports** option allows you to view reports based on the customer and customer number. In the customer reports menu, you can filter the reports in a variety of ways.

The **Customer Reports** Screen allows you to filter by **Bill/Service Type**, **Customer Type**, **Meter Type**, **Municipality**, **District**, **Billing Cycle**, **Status**, and **Meter Route**. You can toggle these on or off using the check boxes. Additional filters are available on a per client basis.



## Customer Reports

- **Bill Type\Service Type** – Filters the customers with only that Bill/Service Type.
- **Customer Type** – Filters customers with only that customer type in customer maintenance.
- **Meter Type** – Filters customers with only that meter type in customer maintenance.
- **Municipality** – Filters customers with only that municipality code selected.
- **District** – Filters customers with only that district code selected in customer maintenance.
- **Billing Cycle** – Filters customers with only that billing cycle.
- **Status** – Filters customers with only that status selected.
- **Meter Route** – Filters customers with only that route selected.
- You can choose your reports in detail and summary (see below)

### Customer Report (Summary)

Run Date 09/16/2024 Run Time 07:21:08		<b>Diversified Technology - Midland</b> <b>Customer Summary Report by Customer#</b>		Page 1
Customer #	Name/ Address	City/St/Zip/ Service Address	Phone #	
7000-01	MIDLAND HEIGHTS HOMES MIDLAND HEIGHTS	MIDLAND HEIGHTS BLOOMSBURG PA, 17815	(724)-643-1980	
7000-02	MIDLAND HEIGHTS CIRCLE MIDLAND HEIGHTS	100 MIDLAND HEIGHTS BLOOMSBURG PA, 17815	(724)-624-1706	
7001-01	MIDCREST HOMES MIDLAND HEIGHTS	300 STATE STREET BLOOMSBURG PA, 17815	(724)-630-2026	
7002-01	OHIOVILLE MUNICIPAL AUTHORITY MIDLAND HEIGHTS	6268 TUSCARAWAS ROAD BLOOMSBURG PA, 17815	(724)-643-0312	
7003-01	HARSCO METALS AMERICAS WEST END APT 300	300 SEVEN FIELDS BLVD BLOOMSBURG PA, 17815	(724)-643-1600	
7004-01	CHESAPEAKE RANGE RESOURCES/PAT WEST END 40111BFRRTY AVENUE/ SUITE 2354	THREE GATEWAY CENTER BLOOMSBURG PA, 17815	(412)-560-4449	

### Customer Report (Detail)

Run Date 09/16/2024 Run Time 07:22:11		<b>Diversified Technology - Midland</b> <b>Customer Detail Report by Number</b>		Page 1
Customer #	Name/ Address	City/St/Zip/ Service Address	Phone #	
7000-01	MIDLAND HEIGHTS HOMES MIDLAND HEIGHTS	BLOOMSBURG PA, 17815 MIDLAND HEIGHTS	7246431980	
District:		Tax Map #:		
Municipality:				
Bill/Serv Type: SH / 6 6" METER		Meter ID: 1631249-02H71832	Billing Units: 1.0000	
Account Status: I INACTIVE		Billing Cycle:D SECTION D	Charge Type: Metered	
Bill/Serv Type: WH / 6 6" METER		Meter ID: 1631249-02H71832	Billing Units: 1.0000	
Account Status: I INACTIVE		Billing Cycle:D SECTION D	Charge Type: Metered	



## Customer Reports

### Customer Labels

**Customer Labels** allows you to print labels for your customers. These labels can be used to mail bills or letters to customers.

The filter fields for Customer Labels are the same as in the Customer Reports screen. You can filter customers on the list with the same options.

In the Customer Labels screen, you can adjust the type of labels you are using, and you may also adjust the order in which the labels print out. This is done by choosing a different option in the **Label Field** and choosing a different option in the **Sort By Field**.

### Customer Label Report with Filter

MIDLAND HEIGHTS HOMES  
MIDLAND HEIGHTS  
BLOOMSBURG PA 17815

MIDLAND HEIGHTS CIRCLE  
100 MIDLAND HEIGHTS  
BLOOMSBURG PA 17815

MIDCREST HOMES  
300 STATE STREET  
BLOOMSBURG PA 17815

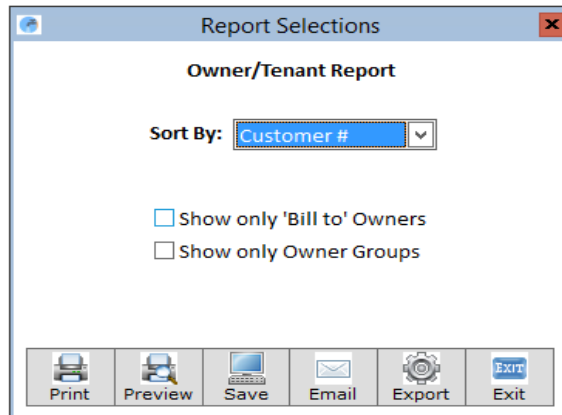
OHIOVILLE MUNICIPAL AUTHORITY  
6268 TUSCARAWAS ROAD  
BLOOMSBURG PA 17815

### Owner/Tenant Report

The **Owner/Tenant Report** allows you to view a report of all the customers you have under the owner/tenant description in customer maintenance.

The **Sort By** field allows you to sort it by **Customer #**, **Customer Name**, **Service Address**, or **Owner group**.

The check boxes allow you to filter the data to Show only 'Bill to' Owners or 'Show only Owner Groups.'



**Report Selections**

**Owner/Tenant Report**

Sort By: Customer #

☐ Show only 'Bill to' Owners

☐ Show only Owner Groups

Print Preview Save Email Export Exit

### Owner/Tenant Report

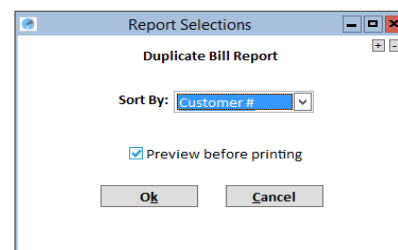
Diversified Technology - Midland				
Owner/Tenant Report				
Run Date: 09/16/2024				Page: 1
Run Time: 11:08:40				
			Sorted by Customer #	
Customer#	Tenant Name	Service Address	Owner Name	Group Code
1001-01	NORFOLK SOUTHERN, MAIL	WEST END	CONSOLIDATED RAIL CORP	
1004-01	JOHN SAMBOL, JR.	156 W. MIDLAND AVENUE	DIANA QUINTANA	
1005-01	JOHN SAMBOL, JR. TENANT	154 W. MIDLAND AVENUE	JOHN SAMBOL, JR.	
1005-02	MICHAEL QUINTANA	154 W. MIDLAND AVENUE	THOMAS/JOSEPHINE	
1005-03	GARY M. KIRKPATRICK	154 W. MIDLAND AVENUE	JOHN SAMBOL, JR.	
1006-01	SLEEPY HOLLOW REAL	150 W. MIDLAND AVENUE	SLEEPY HOLLOW REAL	

### Duplicate Bill Report

The **Duplicate Bill Report** allows you to view all customers that are set up to receive a duplicate bill. The report also shows you the service address and the duplicate bill address.

Duplicate bills are set up so that two people receive the same bill, in an owner/tenant situation.

The report allows you to sort by **Customer #**, **Customer Name**, or **Service Address**. You can preview this report before printing by checking the "Preview before printing" box.



**Report Selections**

**Duplicate Bill Report**

Sort By: Customer #

☒ Preview before printing

Ok Cancel

### Duplicate Bill Report

Run Date: 09/16/2024

Run Time: 11:10:28

Diversified Technology - Midland

Duplicate Bill Report

Sorted by Customer #

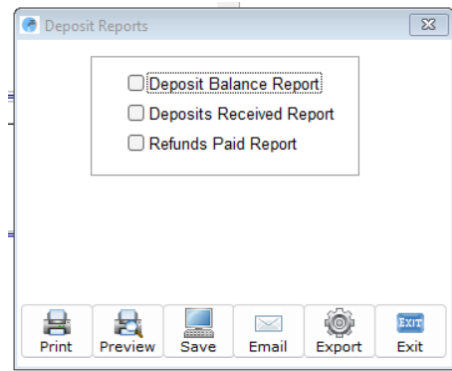
Page: 1

Customer#	Customer Name	Service Address	Duplicate Account
1004-01	JOHN SAMBOL, JR	156 W. MIDLAND AVENUE	DIANA QUINTANA 156 W. MIDLAND AVE BLOOMSBURG, PA 17815
1005-01	JOHN SAMBOL, JR	154 W. MIDLAND AVENUE	JOHN SAMBOL, JR. TENANT 154 W. MIDLAND AVENUE BLOOMSBURG, PA 17815
1008-03	HEATHER ADAMS	146 W. MIDLAND AVENUE	HEATHER ADAMS TENANT 146 W MIDLAND AVENUE BLOOMSBURG, PA 17815

### Deposit/Refund Report

The **Deposit/Refund Report** allows you to see a report that will show you a **Deposit Balance Report**, **Deposits Received Report** or **Refund Paid Report**.

You can select the report you wish to view by clicking on the appropriate check box:



### Extra Billing Amount Report

The **Extra Billing Amount Report** shows you when an extra amount of money was billed to a customer, as indicated in the 'Extra Bill \$' field of the Service Information screen in Customer Maintenance.

### Extra Billing Amount Report

Run Date 09/16/2024 Run Time 11:12:01		Diversified Technology - Midland Extra Billing Amount Report	
Customer #	Name	Bill Type	Extra Amount
1505-01	JOHANNA PERKINS	DQ	\$ 104.20
1505-01	JOHANNA PERKINS	SQ	\$ 67.62

## Default Bill Report

The default bill report shows the customers that have a default bill set up in the Customer Maintenance screen.

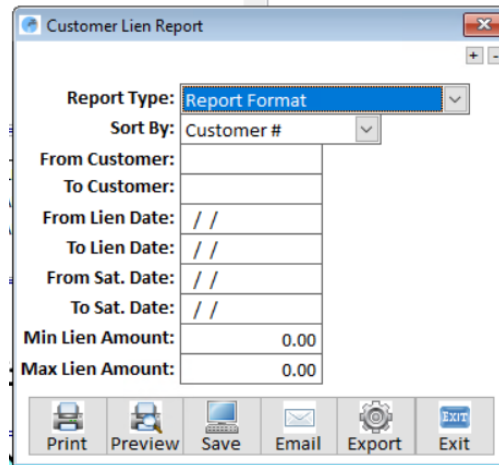
'Default Bill \$' can be entered per customer in the Service Maintenance screen in Customer Maintenance.

### Default Bill Report

Run Date 09/16/2024 Run Time 12:09:21		Diversified Technology - Midland Default Bill Report		Page 1
Customer #	Name	Bill Type	Default Amount	
1265-01	STEPHANIE LIPOMI	GA	\$ 25.00	
1265-01	STEPHANIE LIPOMI	SG	\$ 29.87	
7033-01	ALLEGHENY LUDLUM	SI	\$ 9,262.58	

## Customer Lien Report

The **Customer Lien Report** lists the customers who currently have a lien on their property.



The screenshot shows a window titled "Customer Lien Report". It contains the following fields and controls:

- Report Type:** A dropdown menu currently set to "Report Format".
- Sort By:** A dropdown menu currently set to "Customer #".
- From Customer:** A text input field.
- To Customer:** A text input field.
- From Lien Date:** A date input field with slashes (//).
- To Lien Date:** A date input field with slashes (//).
- From Sat. Date:** A date input field with slashes (//).
- To Sat. Date:** A date input field with slashes (//).
- Min Lien Amount:** A text input field with the value "0.00".
- Max Lien Amount:** A text input field with the value "0.00".
- Buttons:** A row of icons for "Print", "Preview", "Save", "Email", "Export", and "Exit".

The report shows

- Customer #
- Customer Name
- Lien #
- Lien Date
- Lien Amount
- Date lien was satisfied (if applicable)







## Customer Reports

### EDU Report with No Filters

Run Date 09/16/2024		Diversified Technology - Midland			Page 1
Run Time 12:11:49		EDU Report by Customer Detail			
Customer #	Bill/Serv Type	Name	Service Address	Edu's	
1000-01	DQ	MIDLAND SEWAGE PLANT	WEST END	1.0000	
1001-01	DQ	NORFOLK SOUTHERN, MAIL STOP #8	WEST END	1.0000	
1001-01	SQ	NORFOLK SOUTHERN, MAIL STOP #8	WEST END	1.0000	
1002-01	DQ	ELITE GASFIELD SERVICES, LLC	180 W. MIDLAND AVENUE	1.0000	
1002-01	GA	ELITE GASFIELD SERVICES, LLC	180 W. MIDLAND AVENUE	1.0000	
1002-01	SG	ELITE GASFIELD SERVICES, LLC	180 W. MIDLAND AVENUE	1.0000	
1002-01	SQ	ELITE GASFIELD SERVICES, LLC	180 W. MIDLAND AVENUE	1.0000	

### Owner/Tenant Group Reports

**Owner/Tenant Group Reports** allow you to view a report of customers currently set up in an owner/tenant group. This report can be run for all customers in this area as well as if they are on a consolidated bill.

### Owner/Tenant Group Report

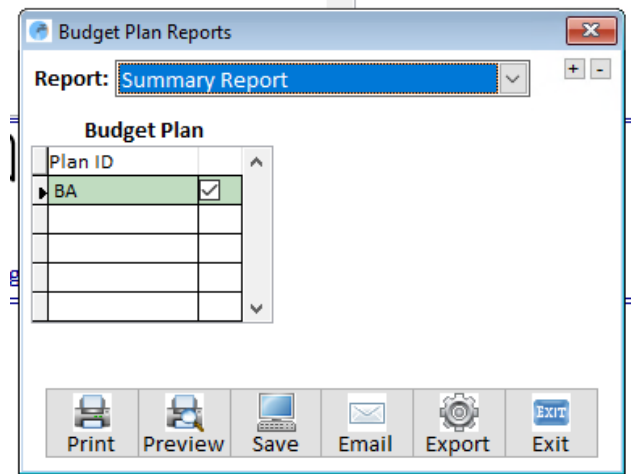
Run Date 09/16/2024		Diversified Technology - Midland			Page 1
Run Time 12:26:40		Owner/Tenant Group Report			
Group:		No Group			
Customer #	Name	Address	Consolidated Bill ?		
1005-01	JOHN SAMBOL, JR	154 W. MIDLAND AVENUE	No		
1006-01	SLEEPY HOLLOW REAL ESTATE	150 W. MIDLAND AVENUE	No		
1006-05	BETJ PROPERTIES	150 W. MIDLAND AVENUE	No		
1007-01	SLEEPY HOLLOW REAL ESTATE	148 W. MIDLAND AVENUE	No		
1007-02	PROPERTY MANAGER MASTERS	148 W. MIDLAND AVENUE	No		
1007-04	ADRIELLE MCGURDER	148 W. MIDLAND AVENUE	No		
1008-03	HEATHER ADAMS	146 W. MIDLAND AVENUE	No		
1011-01	ANNA HUBKA	138 W. MIDLAND AVENUE	No		
1022-02	SLEEPY HOLLOW REAL ESTATE	112 W. MIDLAND AVENUE	No		

## Budget Reports

**Budget Reports** allow you to view a report on customers currently on a budget plan.

The report types available are:

- **Summary Report** – The Summary Report will show you the customers that are currently on budget plans.
- **Reconciliation Report** – You must enter the month and the year.
- **Reconciliation Letter** – You must enter the month and the year (this letter must be created to use this feature)
- **Past Due Report** – You must enter the number of days past due.
- **Past Due Letter** – You must enter the number of days past due (this letter must be created to use this feature)



### Budget Summary Report

Customer #	Name	Budget Year - Month	Budget Amount	Balance Due	Total Cons.	Avg. Cons.	Billing Count	Pay Count	Last Payment
T0059	ADAM & TERESE DELAPLAINE	2018 7	\$87.00	\$504.80	0	0	5	7	09/30/2019
T0060	ADAM & TERESE DELAPLAINE	2018 7	\$87.00	\$894.08	0	0	5	7	09/30/2019
T0079	KIMBERLY & SHAWN BAKER	2019 10	\$50.00	\$669.50	0	0	0	0	/ /
T0118	DANIEL VINSKO	2019 5	\$50.00	\$1,206.83	0	0	2	5	10/02/2019
T0128	JOHN BENEDICT	2018 6	\$87.00	\$1,106.05	0	0	2	1	08/05/2018

### Reconciliation Report Past Due Budget Report

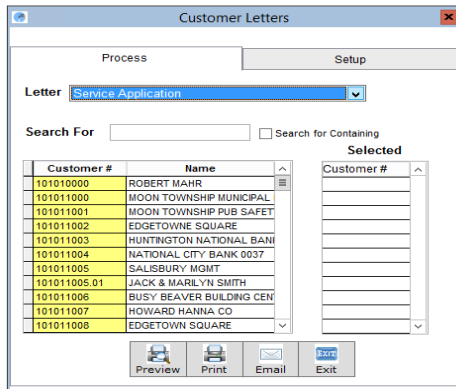
Customer #	Name	Total Budget Amount	Balance Due	Last Payment Date	Last Payment Amount	# of Days
T0079	KIMBERLY & SHAWN BAKER	\$50.00	\$669.50	08/29/2018	368.85	412
T0128	JOHN BENEDICT	\$87.00	\$1,196.05	08/05/2019	130.00	71
T0144	DIANE IRWIN	\$87.00	\$884.75	07/09/2018	50.00	463

## Customer Letters

**Customer Letters** allows you to print and send letters to the selected customers. This process will be run from the landing page. If you are using VUB you will select this process by Reports – Customer – Customer Letters.



In the letter drop-down you can choose the appropriate letter that you would like to send. You can then choose the customer and preview, print, and email the letter if you choose.



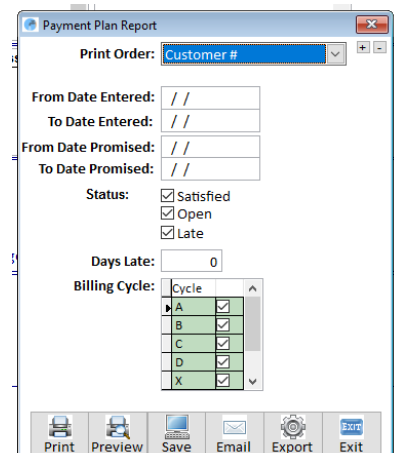
To add a letter to the drop down, you will need to do so in the set-up tab. To add a new letter, it will need to be created in a program in the proper format (contact Diversified Technology for assistance).

## Payment Plan Report

The **Payment Plan Report** option allows you to view and print reports that show the customers currently on a payment plan, based on filters you provide.

Select the order in which you would like the report to print by using the drop down under print order. You may also filter the report using the dates and the status of the payment plan.

This will allow you to view only the data that you select.



## Payment Plan Report

Run Date 09/16/2024  
Run Time 12:32:37

Diversified Technology - Midland  
Pay Plan Report

Page 1

Customer #	Name	Date Entered	Date Promised	Amount Promised	Last Payment	Days Late	Status
1008-03	HEATHER ADAMS	11/17/2022	12/15/2022	120.00	11/18/2022 120.00		Satisfied
1008-03	HEATHER ADAMS	11/17/2022	01/15/2023	150.00	02/23/2023 150.00		Satisfied
1008-03	HEATHER ADAMS	11/17/2022	02/15/2023	150.00	06/22/2022 150.00		Satisfied
1008-03	HEATHER ADAMS	11/17/2022	03/15/2023	150.00	11/06/2022 150.00		Satisfied
1008-03	HEATHER ADAMS	11/17/2022	04/15/2023	150.00	12/21/2022 150.00		Satisfied
1008-03	HEATHER ADAMS	11/17/2022	05/15/2023	150.00	12/21/2022 150.00		Satisfied
1008-03	HEATHER ADAMS	11/17/2022	06/15/2023	150.00	02/12/2022 60.00	459	Late
1008-03	HEATHER ADAMS	11/17/2022	07/15/2023	150.00		429	Late
1008-03	HEATHER ADAMS	11/17/2022	08/15/2023	150.00		398	Late
1008-03	HEATHER ADAMS	11/17/2022	09/15/2023	150.00		367	Late
1008-03	HEATHER ADAMS	11/17/2022	10/15/2023	150.00		337	Late
1008-03	HEATHER ADAMS	11/17/2022	11/15/2023	150.00		306	Late
1008-03	HEATHER ADAMS	11/17/2022	12/15/2023	150.00		276	Late