Apply Surcharges from Debtors

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Summary

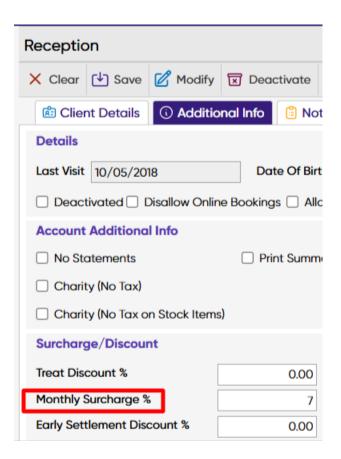
The Debtors Screen can be used to calculate and attribute monthly Surcharges and Early Settlement Discounts.

Details

Surcharge levels (the actual percentages to be assigned to each client) must be specified for each client before they can be run via the Debtors screen.

Assigning a Surcharge level to a client

- 1. Navigate to the Reception Screen (Reception button from main menu).
- 2. Search for and select a client, then navigate to the Client's Additional Information screen.
- 3. Enter a percentage figure into the 'Monthly Surcharge' field.
- 4. Repeat steps 1 to 3 for all required clients.



Applying Surcharges to client Accounts

1. When running debtors (See: Run Debtors) tick the 'Add Surcharges' checkbox/s.



- 2. The Surcharge figures will be displayed in the 'Surcharge Total' column for each client.
- 3. To apply the surcharges, select the highlighted 'Commit Surcharges' button.



4. The surcharges will be added to each client's balance and it will also be added to each client's account screen.