

Apply Surcharges from Debtors

24/07/2025 10:36 am BST

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.

Reception

✕ Clear

↓ Save

✎ Modify

✖ Deactivate

📋 Client Details

ⓘ Additional Info

📄 Not

Details

Last Visit10/05/2018Date Of Birth

☐ Deactivated☐ Disallow Online Bookings☐ Allc

Account Additional Info

☐ No Statements☐ Print Summ

☐ Charity (No Tax)

☐ Charity (No Tax on Stock Items)

Surcharge/Discount






Treat Discount %0.00

Monthly Surcharge %7






Early Settlement Discount %0.00

Applying Surcharges to client Accounts

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

Current Period	Period 1	Period 2	Period 3
 Run Date	30 Days	60 Days	90 Days
From 24/07/2025 	From 24/06/2025 	From 25/05/2025 	From 25/04/2025 
To 25/06/2025	To 26/05/2025	To 26/04/2025	
<input type="checkbox"/> Add Surcharge	<input type="checkbox"/> Add Surcharge	<input type="checkbox"/> Add Surcharge	<input checked="" type="checkbox"/> Add Surcharge
<input type="checkbox"/> Calculate ESD			

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.

	<input type="checkbox"/>	Ambery, A	2 Gravel Cottages
	<input type="checkbox"/>	Archive, Test	1
	<input type="checkbox"/>	Baker, L	10 The Cottage
			
Total Debtors: 20		Commit Surcharges	Date: 24/07/2025 

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