

Account Class (Setup) - Addition of Per Invoice Fees (17022) [New Feature]

Last Modified on 07/23/2024 4:18 pm EDT

A new default setting, 'Per Invoice Fee', is available in the Account Class setup screen that will be visible on the Customer Service screen and in Edit Account when configured.

Account Class Setup - Finance Charges and Other Fees

New Default Setting Fields:

- Per Invoice Fee 1 (and 2) Charge Code
- Per Invoice Fee 1 (and 2)

Logic:

- If the Per Invoice Fee Charge Code field is blank, the Per Invoice Fee field linked to it can not be edited.

UPDATE ACCOUNT CLASS				
Details	Customer Portal	Payment Processing	Status Management	Finance Charges and Other Fees
FINANCE CHARGE TYPE	During Billing			
ANNUAL RATE	0.00			
CHARGE CODE				
CHARGE MINIMUM	0.00			
PAST DUE MINIMUM	10.00			
INSUFFICIENT FUNDS FEE	0.00			
INSUFFICIENT FUNDS FEE CHARGE CODE				
CREDIT HOLD PLACEMENT FEE	0.00			
CREDIT HOLD PLACEMENT FEE CHARGE CODE				
PER INVOICE FEE 1 CHARGE CODE	Paper Bill Fee			
PER INVOICE FEE 1	10.00			
PER INVOICE FEE 2 CHARGE CODE				
PER INVOICE FEE 2				

Auto Save Suspended - Validation Error

Customer Service Screen & Edit Account

Customer Service Screen:

- Click within the Account Details section of the Customer Service screen to view the Paper Bill Fee
- If an override exists for the account, it will be displayed first, followed by the default setting configured in the Account Class.

Edit Account:

- In the Settings tab of Edit Account, the Paper Bill Fee displays as a link in the Billing section. Click on the link to open the Override Paper Bill Fee dialog, which allows the user to enter an account-level override. **Note:** If an override amount is entered, the user must select 'Done' for the dialog box and then 'Save' for the Edit Account screen.

49146 Example Account

3119 N San Gabriel Blvd
Rosemead, CA 91770-2545
US

Active

TERMS COD
INVOICE DELIVERY Printed

DIVISION QAWASTE
ACCOUNT MGR Paul Gonzalez
CLASS INVFEE
BILL GROUP QA Billing Cycle
ADVANCE - MONTHLY Billed Thru Date None
NEXT INVOICE DATE Jul 01, 2024 BATCH-25880 (not started)
SOURCE Call In
REPAYMENT ACH
PAPER BILL FEE \$ 8.00 (Default \$ 10.00)

EDIT ACCOUNT

Account Settings

Billing

BILL GROUP QA Billing Cycle

Advance - Monthly **Billed Thru Date None** **Next Invoice Date Jul 01, 2024**

INVOICE BY EMAIL No

TERM COD

CREDIT LIMIT

PAPER BILL FEE \$ 8.00 (Default \$ 10.00)

AP

DEFAULT WALLET ACH

INSTRUCTIONS

WARNING ON OPEN

SAVE

OVERRIDE PAPER BILL FEE

DEFAULT AMOUNT \$ 10.00

Override Amount 8.00

DONE