# **Apply Surcharges from Debtors**

01/07/2025 10:48 am BST

## **Summary**

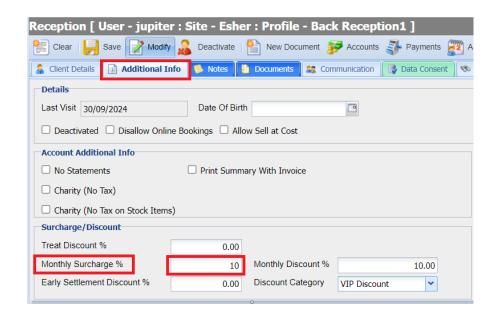
The Debtors Screen can be used to calculate and attribute monthly Surcharges and Early Settlement Discounts.

#### **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.

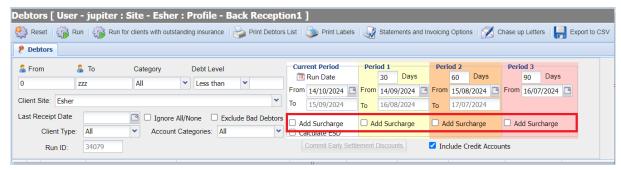
## Assigning a Surcharge level to a client

- 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.

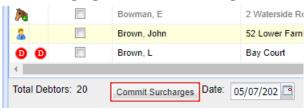


# **Applying Surcharges to client Accounts**

1. When running debtors (See: Run Debtors) tick the 'Add Surcharge' 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.