

# 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.

Reception [ User - jupiter : Site - Esher : Profile - Back Reception1 ]

Clear Save Modify Deactivate New Document Accounts Payments

Client Details **Additional Info** Notes Documents Communication Data Consent

**Details**

Last Visit 30/09/2024 Date Of Birth

☐ Deactivated ☐ Disallow Online Bookings ☐ Allow Sell at Cost

**Account Additional Info**

☐ No Statements ☐ Print Summary With Invoice

☐ Charity (No Tax)

☐ Charity (No Tax on Stock Items)

**Surcharge/Discount**

Treat Discount % 0.00

**Monthly Surcharge %** 10 Monthly Discount % 10.00

Early Settlement Discount % 0.00 Discount Category VIP Discount

## Applying Surcharges to client Accounts

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

**Debtors [ User - jupiter : Site - Esher : Profile - Back Reception1 ]**

Reset 
 Run 
 Run for clients with outstanding insurance 
 Print Debtors List 
 Print Labels 
 Statements and Invoicing Options 
 Chase up Letters 
 Export to CSV

**Debtors**

From: 0 To: zzz Category: All Debt Level: Less than

Client Site: Esher

Last Receipt Date:

Client Type: All Account Categories: All

Run ID: 34079

☐ Ignore All/None 
 ☐ Exclude Bad Debtors

Current Period: Run Date: From 14/10/2024 To 15/09/2024  
 Period 1: 30 Days From 14/09/2024 To 16/08/2024  
 Period 2: 60 Days From 15/08/2024 To 17/07/2024  
 Period 3: 90 Days From 16/07/2024 To

☐ Add Surcharge 
 ☐ Add Surcharge 
 ☐ Add Surcharge 
 ☐ Add Surcharge

☐ Calculate ESD

☒ Include Credit Accounts

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

		Bowman, E	2 Waterside Rd
		Brown, John	52 Lower Farm
		Brown, L	Bay Court

Total Debtors: 20

Date: 05/07/202

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