

How to View Service Charge Recap

The **Service Charge Recap** screen is used to view the lists of service charge amount per invoice per customer. Below are the steps to view the recap screen.

1. Open the **Calculate Service Charges** screen from **Sales | Calculate Service Charges** menu.
2. Fill out the details on the screen.
 - a. **Customer.** Select the Customers you want the run the service charge. If left blank, this will calculate the service charge for all customers.
 - b. **Status Code.** Select the customer's status code. If left blank, this will calculate the service charge for all status codes.
 - c. **As Of Date.** Enter the date in this field. This will analyze and assess service charge fees as of this date. It will re-analyze service charges from the date the last time the process was ran until the as of date defined.
 - d. **Include Budget Customers.** Check this option if service charge for overdue customer budget will be calculated too.
3. Click the **Recap** button.

Calculate Service Charges

Calculate **Recap** Close

Details

Customer: 0001005095

Status Code: A

As of Date: 2/29/2016

Include Budget Customers: ☒

Ready

This will open the Service Charge Recap screen. Use the navigate buttons to navigate to the next record.

Service Charge Recap

Process Close

Details

Customer: ABC Reseller Service Charge Date: 2/29/2016

Service Charge Account: 40510-0001-000 Service Charge Amount: 14.30

Invoice Number	Budget Description	Amount
SI-118		4.00
SI-443		0.43
	Customer Budget For: 01/10/2016	9.86
		0.00
		14.30

Records Created = 1 Total Amount = 14.30

Ready

You can use the **Process** button on this screen to calculate the service charges.

The **Service Charge Recap** screen is used to view the lists of service charge amount per invoice per customer. Below are the steps to view the recap screen.

1. Perform step 1 and step 2 of [How to Calculate Service Charge](#).

2. Click the **Recap** button.

Calculate Service Charges

Calculate Recap Close

Customer:

As of Date: 12/31/2015

Include Budget Customers: ☒

Ready

This will open the Service Charge Recap screen. Use the navigate buttons to navigate to the next record.

Service Charge Recap

Process Close

Customer: ABC Reseller Service Charge Date: 12/31/2015

Service Charge Account: 40000-0001-007 Service Charge Amount: 7.39

Invoice Number	Amount
SI-29	7.39
	0.00

Records Created = 2 Total Amount = 1,466.00

Page 1 of 2

You can use the **Process** button on this screen to calculate the service charges.