**Kandy MC – Rate Management**

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# **SYSTEM FEATURES**

## **RATE MANAGEMENT**

* The system facilitates user Rate management functionality. That each feature has described as follows.
* New assessment feature
* View Premises feature
* Edit the Assessment feature
* Balance before the feature
* Property Master Data
* Quarter calculation feature
* Discount calculation feature
* Other special feature
* Rates Payment feature
* Rate Validation
* Rates Report

### **PROPERTY MASTER DATA**

#### Property type management

* The system provides a facility of the text field for the user to add Property Name and Property penalty in the Type of property section.
* Property name cannot be duplicate and required.
* Then, after adding the details user can click the “>>ADD’ Button.
* When the user doubles click the name of a property in the list, the system provides a view to updating the Name and Property penalty, and the user has to click the “Update” button.

#### Divisions Management

* System provides facilitate text field to use to add division Name.
* Division Name cannot duplicate.
* User can save the updated details.

#### Streets Management

* User has to enter Street Name, Street ID, and Division selects from the dropdown menu (St ID + Division Id unique).
* User can update the details of the street by double-clicking by the St ID in the list.

#### Manage Warrant Percentage

* + User can edit or delete the percentage.
  + User has to enter the Property Name and Property planet.
  + Then click the update button.

### **NEW ASSESSMENT FEATURE**

* The new assessment feature facilitates to add new property.
* Add for the current quarter – System facilitates to billing the current quarter.
* Add for a future quarter- System facilitate to add the property details for the future quarter and no billing will be done.
* For each quarter, users have to input property and owner details.

#### Add for the current quarter.

* When user enter the Division code, Street Code, and Assessment Number, the system automatically generate the unique customer number.
* The quarter amount calculate automatically as debit for the new property and it can be view on the payment history.
* If a user wants clear entered data, there is an option for click the “Clear” button.
* Else user wants to add entered data user clicks the “Add new property “option.” Also, if there is any error system will validate and display the error message.

##### Property details

* The system facilitates adding each required detail. The following information is needed to add to property details
* **Division:** The user can select each division code related to the property using the drop-down menu.
* **Side:** For selecting the side, there is two option as” left “and “right,” and using the drop-down menu.
* **Street name:** Text field, Drop down menu.
* **Add assessment number:** Text field for adding assessment number.
* **Add annual value:** Numeric.
* **Add year rate percentage:** Users must select rate pay year using drop drown box. It has included data as a percentage
* **Add property type:** There are options to select property type using the drop-down box. (Domestic, Commercial, Industrial, Government, Education, Religious, Marshland Paddy field, Other)
* **Add property description:** The system facilitates entry of the property description and previous dates are automated loaded.

##### Owner details

* Each owner has to add the following details in the owner details section.
* **Owner Name:** In this option user has to select the owner title using the drop-down menu. And this system gives the facility to enter the owner’s name. Also, this is a required field.
* The following details are not required.
* NIC/Ref No, Address, Mobile, Home.

#### Add for a future quarter

* Add for future quarter function features are the same as the current quarter.
* But not calculate the quarter amount.

### **VIEW PREMISES FEATURE**

* View details of property and owner details.
* The system facilitates the view premises scenario following features.

#### Payment history

* + User clicks the payment history option. The system displays the payment history list and clicks the search icon related to each invoice ID. Also, the users can view the daily rate tax receipt overview.
  + Cancelled bills are shown in red color.
  + System facilitates the export list of payment history reports to the PC.
  + Using the print button and print icon user can print the list of payment history reports.
  + User can recopy and print each invoice details by clicking the payment history print icon.

#### Inquiry Report

* + System facilitates viewing property inquiry reports.
  + User can get a list of details by selecting the particular date (System shows the calendar) duration and searching.
  + System facilitates the saving list of the inquiry report to the PC.
  + Using the print button and print icon user can print the list of inquiry reports.

#### . Change History

* + System facilitates change property payment details.
  + Using the export button user can export property change details.
  + Using the print button user can print the list of changed property details (Include Description, Changed date, and user name).

#### Disable or Enable Property.

* There is option for the hold billing process of the property for temporary by clicking the temporary disable button.
* If user need to add the description for the temporary disable process system displays the dialog box.
* After saved the disable, user can view the details in property change history. (1.2.3.)
  + Also there is an option for enable the disabled property (Same as the enable process).

#### Remove Property

* The system facilitates the removal of the property details using the remove button, and then, before the execution, remove the system and display the confirmation box.
* User cannot activated removed property.
* Also system will not process the bill of removed property.

#### Print notice of assessment (KFORM)

* Users can print notice of assessment using the “Print notice of assessment (KFORM)” icon.

#### Add Notes

* Users can add a note for a selected property using the “Add to note” option.
* After clicking the options system displays the Box to add to the red note.
* Users can describe red notes and have options of saving and clearing the note.

#### View Notes

* After the user add the note click the property overview and then open the details of the customer property.
* After clicking the” Attention Red Note,” the user can edit and delete the description of the red note.
* Red note description includes details of User name and Date.

#### Created User Details

* + - * User can view the details of the created user, click the property overview, and select the add user details.
      * System displays add user details as User name and User Time.

#### Previous Approval Details

* System facilitates to view the list of previous approvals for the select property.
* System facilitates the get soft copy and hard copy of the “A sheet”

### **EDIT ASSESSMENT FEATURE**

#### Change all property details

* If the user wants to change the property details system facilitates to “edit property option.”
* User can save the edited details.
* User cannot add the duplicate property number.
* User can view the changed property details through property changes history.
* System automatically gather the information for “A sheet” and generate that sheet.
* User can get the soft copy or hard copy from the system.

#### Change owner details

* System facilitates to edit the owner details.
* User can save the edited details.

#### Setup for edit option for the approval status

* + - System facilitates to approve the user edited details.
    - User clicks the Rate approval and opens the “Rate approval Manager window.”
    - There is four approval.
* Checking officer approval
* CC Approval
* AO Approval
* Account Department Approval.
* To complete the approval process above four people must have to approve.

#### Pending list for approvals

* According to the approval, system adjust the amount of debit and credit related property number.
* Also user can view the details of approval through the payment history.

##### Checking Office Approval

* When the user edits the property details, those details are moved into a pending approval for the Checking Office Approval
* Then Checking Office can view the pending approval list.
* User can approve or reject the approval request.
* If the user clicks the approve user has to add a comment for approval.

##### CC Approval

* After Checking Office Approved the property details that details are moved in to as pending approval for the CC Approval
* Then, CC can view the pending approval list.
* There is an options for approve or reject the approval request.
* If the user clicks the approve user has to add a comment for approval.

##### AO Approval

* After CC approves the property details, details are moved in as pending approval for the AO Approval.
* Then, AO can view the pending approval list.
* After selecting an approval request can make Approve or Reject.
* If the user clicks the approve user has to add a comment for approval.

##### Account Department Approval.

* After AO approves the property details, details are moved in as pending approval for the Account Department Approval**.**
* Then Account Department can view the pending approval list.
* After selecting an approval request can make Approve or Reject.
* If the user clicks the approve user has to add a comment for approval.
* After Account Department approves the edited property details approval process is completed.
* Following details are displayed in the pending list.
* Premise ID
* Property Number
* Owner ID
* Full Name
* Address
* Division
* Street
* Property

### **BALANCE BEFORE FEATURE**

* Users can add an opening balance for the startup state.
* Users can find customers using Customer ID.
* The system displays the details of the related customer.
* Users can add Arrears, Current year Rates, warrants, Future payments, and discounts.
* And also user can select B/F Date by using the calendar.
* The system gives the option to save the details.
* This option doesn’t need to continue in the access time.
* Admin should have disabled this option.

### **QUARTER CALCULATION FEATURE**

* User can calculate quarter for the start of the new quarter.
* User cannot reverse after done that process and all other account reports of quarter update when quarter calculation.

### **OTHER SPECIAL FEATURE**

#### Mange fields officers

* Admin can add new officer by entering the details.
* User has to enter the following details.
* Officer ID-Required
* Full Name
* Address
* Contact Number and click add New.
* User can edit the details of field officer.
* User can save or close the edited details.

#### Bill issue for the Field officers

* System facilitates the user to issue a bill for the field officer.
* User searches field office details by searching the field Officer ID.
* Then the system displays the Field officer details, and the user has to select the Payment Type, Payment amount, and Description of the payment.
* User can save the details.

#### Update Credits for property

* System facilitates the user to update the credit amount of the property.
* User clicks the payment.
* Then open the Rates Payment overview.
* User can select the payment type as credits.
* Also can add the Description and Payment amount.
* Then clicks the “Pay button.”

#### Update Debit for property

* System facilitates the user to update the debit amount of the property.
* User clicks the payment.
* Then open the Rates Payment overview.
* User can select the payment type as debits.
* Also can add the Description and Payment amount.
* Then clicks the “Pay button.”

#### Cancel receipt

* + System facilitates the user to get the cancel receipt summary report.
  + User can search the cancel recipe by selecting the Location, Date Duration, Account Year, user, Receipt Order (Ascending, Descending), and category.
  + User can Save, Print, and view the Cancel Receipt report.

#### Property Search

##### Division, street, property no

* User can search the property details list using division (a dropdown box within the option of division number), street name, and property Number.

##### Customer number.

* User can search property details using Customer Number.
* Then system displays the property details regarding the customer.

##### Owner Name / NIC

* Using the customer name and NIC number user can search the property.
* Also, users can search property details click by the standard search option.

##### Description

* System facilitates the user to get the result of property details searching by the Description.

##### Property Type

* System facilitates the user to get the result of property details searching by the Property Type.
* Property Types are included in the drop-down menu.

##### Property Status

#### Add Manual Warrant for Properties

* To manually warrant Calculation user has to enter the division number and street name and search.
* Then the system displays the list of property details (Premises ID, Property No, Property description, Full Name, Annual value.
* After selecting a particular property Number and click the “Add Warrant” icon.

#### Manage Bill Printer Settings

* System has allowed the user to manage the bill printer settings. There are options to print bills.
  + - * + Rates bill printing
        + Do Bill printing
        + Other income bill printing
        + After setting the bill printing option user has to save settings using the “Save” button.

#### Manage K Form Printer Settings

* System facilitates to manage Office copy and Customer copy of K form printer settings.
* User has to mark the available details.
* After setting the details user can save, and if not needed to save user can click the “Clear “Button.

#### Manage Red Notice Printer Settings

* User can manage the Red notice printer settings; in this functionality, the user has to mark each related detail as available.
* Also user has to settings each property. (Left, Top, Width, Alignment (Dropdown box), and Description).
* Then, the user can save or clear the setting data using the Clear and hold buttons.

#### Rate validation

* User can get the rate validation by selecting the drop to drown menu of Division, Street, Year, and Quarter, by searching.
* Following details are displayed in the details of the Rate validation process.
* Customer Number
* Customer
* Property
* Balance
* Warranties

### **RATES PAYMENT FEATURE**

* User can view the payment window by searching the Customer Id.
* If user enter invade customer number, system displays the error message.
* When user enter valid customer ID user can view the basic details of the rate payments.
* Following details are displayed by the system.
* Customer Number
* Division
* Street name
* Property Number
* Address
* NIC Number
* Description
* Annual Value
* Annual Rates
* Property Type
* Quarter Rates
* User can view the last payment information.
* There is an option for the view payment history details.
* As well as system calculate the discount amount automatically considering the current rate.
* Following arrears details are displays by the system.
* Arrears payable
* Warrant cost
* Year Rates
* Total Due Amount
* Over payment
* Receive discount.
* System facilitates following payment types for the payment.
  + - Payment by cash
    - Payment by cheque
    - Payment by credit card
* User has to enter the payment amount to the system.
* After save, payment is successful system generate the invoice and send SMS to the customer.

#### Auto discount calculation.

#### Ability to pay any amount

* In the rate payment section, the user can search customer details by searching Customer ID.
* The system displays the customer details and Balance details.
* Also, the system facilitates paying payment amounts by cash, cheque, or credit card.

#### Payment between Branches

* System facilitates to user to payment between two branches.
* System update report daily in related branches.

#### Check Online Receive Payment

* System facilitates the user to check the details of online received payment.

#### Multiple Property Payment

* User searches property details of the customer.
* System displays the multiple payments overview.
* User selects the Payment Type.
* User clicks the ‘Go to multiple payments “.
* User can select the confirm process.

#### Payment for Upcoming year tax

* System facilitates users to pay for the upcoming years.
* User can see the Customer Details, Balance Details, and Discount amount for each quarter.
* User can view the payment history and Past Balance.
* User has to select the Payment Type, Description, and Payment amount for the pay.

#### Re-copy function

* If user cannot to do bill some reason, user can print again that bill without change the details.

### **SMS FOR RATE**

* System sends Discount details to the Owner
  + - * System sends Arrears details to the Owner
      * System sends SMS API based.
      * User can view sent SMS using SMS portal.

### **RATES REPORT**

#### Daily Receipts

##### Daily Paid Receipts

* System allows the user to select the receipt date by using the calendar and selecting the user name.
* When the user searches the daily paid receipt, system display the Receipt Number, Payment Type, Billed Issued, Bill owner, and Paid Amount.
* Also, users can search, view, print, and export reports.

##### Daily Cancel Receipts

* User can select the receipt date and search the details of the canceled receipt on the particular date.
* There is a facility to get receipt details in ascending or descending order.
* User can print the cancel report, export the cancel report, and view the cancel report.

##### Daily Receipt Summary Report

* In this section, the user can gets a summary of all types of payment summary details on a particular date.
* System facilitates print, search, export, and view the summary report.

#### Rate Tax Daily Credit Report

* User has to select the payment type (Multiple select) using the drop-down menu, date duration, and division.
* Then, the user has to select the type of category.
* System fetches the search result and displays it as a list.
* User can search, view, export, and print the daily credit summary report according to the particular time. Also, the system has facilitated changes in the payment type.
* System facilitates to search, view, and print, export, save the Rate Tax Daily credit report.

#### Credit Summary Report

* User can view all credit summary report details.
* User can get the details by searching the following options.
* Time duration
* Change Property Type
* Receipt issue category
* The Following section is included in the Credit summary report.
* **Credit Details**

Date, Arrears Payment, Warrant Payment**,** Rate payment, Overpayment, Bank Fee, Discount, Paid Amount, Credit, and Details are included in the credit details report.

* **Summary Details**

Total Arrears, Total warrant, Total Yearly Rate, Future Payment, Total Bank fee, Total Discount, Total Credit, and Total Debit details are included in the summary details report.

* System facilitates the user to Export, Print, and View the Credit details and Summary details report.

#### Get Credit Summary Report Division wise

* User can get the credit summary report Division wise.
* Also, users can search the details in a particular time period and division.
* There is an option for export, print, and view the search summary report.

#### View Current Arrears Report

* System has given the option to search using division, street, side, owner name, and property type.
* User can get details less than, more than, or between wise arrears details.
* Also, users can Save, Print, and view the report.

#### Current Arrears Summary Report

* + - * System has given the option to search using division, side, and property type.
    - User can get details less than, more than, between wise arrear reports.
    - Also there is option for get the last year’s arrears report.
    - System has given the option to export, print, and view the summary report.

#### Past Arrears Report Management

* + User can search using division, street, side, owner name, and property type.
  + Apply less than, more than, between arrears
  + After getting the report user can View, print, Export, or Export to the excel sheet.

#### Rate Tax Current Balance Report Management

* + User can get the Rate Tax Current Balance Report by searching the division, Street Name, and Side.
  + Also, the system has facilitated the printing, saving, and viewing of the report using each icon.

#### Rate Tax Current Balance Division Summary Report

* + System facilitates giving current balance summary division-wise.
  + System displays the total Arrears, Warrant, Rate, Future amount, and Total.
  + User can Print, Export, and View the balance summary.

#### Rate Tax Current Balance Summary Report

* User can search the details of Rate Tax current Balance summary report by searching the Division, Street name, and Side.
* Then, the system displays the list of details for each Customer.
* Also system facilitates the print, save, and View the Current balance Summary.

#### Current Arrears Summary Report (Streetwise) Management

* + User can search the current balance streetwise using Division ID.
  + User can print, export, and view the streetwise current balance report using Print, Export, and View icons.

#### Get Past Arrears Street-wise Summary Report

* Following options have to select by the customer.
* Only plus Balance
* Only Minus Balance
* Both plus and Minus Balance.
* User can search amount all, less than, greater than, or between.
* User can change the property type.
* System facilitates user to Search, Export, and Print the past Arrears summary report by search division and Date.

#### Search/Print/Save Rate forecast report

* User can search the forecast rate using the Division, Street Name, and side.
* Also, after the search system fetched and displayed the result.
* User can export the report to the excel sheet.

#### Search/Print/Save Arrears Division-wise Summary Report

* System displays the Total arrears according to each Division ID.
* User can Save and print the report using the Save and Print icons.

#### Search/Print/Save Warrant division-wise Summary Report

* + System displays the current and past total warrant after the calculation.
  + Use can select the options current or past warrant.
  + System facilitates the user to search current warrant and save or print option.

#### Search/Print/Save current Billing Rate division-wise Report

* System displays the rate for the current billed report details.
* For quarter open bill.
* User can search current arrears, save the report, and print the report.

#### Get Print Current future payment report

* + System facilitates user to get details reports of current future payments.
  + User must select Division number, Side, Street Name, and Property Type.
  + System fetches the result from the database and displays it for the user.
  + User can save or print the report.

#### Search/Print/Save Rate Accounting Listing Report

* + - * System facilitates the user to list the rate account selected by the year.
      * System displays the total amount of the follows in each quarter.
* Forward Balance
* Warrant
* Rate Billing
* Debit
* Future payment
* Payments
* Discount
* Credit
  + - * User can search, export, and print the rate Account List.

#### Get Discount Summary Report

* User can get the Discount Summary Report by searching the Start Date, End Date, and Discount Limit.
* Also system displays the Number of Discount Invoices and Total Discounts.
* System facilitates the user to print or save the summary report.

#### Get the Property Book Report

* User can search the Property Book by searching the Division, Side, and Street Name.
* System filters the result and displays it to the user
* User can Export, Print, and View the report.

#### View Property Summary Report division wise

* + - * System facilitates the user to get the Property Summary Report division-wise by searching the Division.
      * Following details are consistent in the summary report for each Division.
      * Division
      * Street Code
      * Street Name
      * Number of Property
      * Total Annual Value
      * System facilitates the user to Export, Print, and View the report.

#### View Property Annual Value Report

* User can search details report of the Property Annual Value Report using division, street, side, type of property
* Annual value can filter less than, greater than, and between.
* Following details are consistent in the Property Annual Value Report.
* Customer Number
* Property Number
* Owner Name
* Address
* Property Type.
* Value.
* Rate
* Street Name
* Division
* Also, user can save, print, and view the report

#### View Temporarily Disabled Property Value Report

* User can get the Temporary Disable Property Value Report by searching using division, street, side, type of property
* User can get the report result less than, greater than, between wise the Annual report.
* Following details are displayed as a result.
* Customer Number
* Property Number
* Owner Name
* Address
* Property Type
* Value
* Rate
* Also user can save, Print, and View the Temporarily Disable Property Value Report.

#### View Remove Property in duration Report

* User can search the report of Remove property in time duration.
* Also system facilitates the user to select a particular date duration using the calendar.
* If there is no result system displays the message “No records were found.”
* Also user can save or print the Remove Property in the duration Report.

#### Get Disable Property in duration Report

* User can get the Disable property report in time duration by searching the Type (Enable or Disable), From Date to date.
* System facilitates the user to select date duration using the calendar.
* Also, Users can search, Save and print the report.

#### View Property Book Report

* User can get the Property Book report by searching the Division, Street Name, and Side.
* Following details are included in the Property Book Report.
* Oid Number
* Premisses Number
* Owner Name
* Property Type
* Property Value
* Entered By
* Ented date.

#### View Property Registration Report

* User can get the Property Registration Report by searching the Division and time duration.
* Following details are displayed in the report.
* Premises ID,
* Registered Date
* Rate.
* Also system gives the option to the user to Search, Print, and Save the report.

#### View Register of rate Tax

* + User can get the report of Register of Rate Tax.
  + Following details are required to search the report details.
  + Year
  + Quarter
  + Division
  + Rate
  + Also user can get the details by searching by the Owner’s Name.
  + User can Export, print, and Export to an excel sheet of the report.

#### Register of rate Tax Street summary

* System facilitates to user to get details of Rate Tax Street summary report by searching division, year, and quarter
* Also user can export or print the report.

#### Property Change Report

* User can search the Property change report by searching the date duration and Division; also, the user can select the change types.
* Change type listed as follows.
* Owner name change
* Property Description change
* Property Type change
* Annual value change
* Year Rate change
* Property Number change
* Following details are displayed in the Property change Report.
* Property Number
* Description
* Previous Value
* New Value
* Date
* User
* User can View, Export, and Print the Property change Report.

#### Make payment

* User can get the list of paid property searches by the Field office ID.

#### Make payments for the duration

* User can get the Do payments report by searching the Field office ID and selecting the time duration.

#### Do Summary report

* System facilitates the user to get payment details summary report by searching the Field office ID and selecting the time duration.

#### Do analyze the report

* System facilitates user to analyze report by searching the Field office ID and selecting the time duration.

#### Notice of assessment

* User can search the notice of Assessment by Division, Street name, Side, Year, and Property Type.
* Then, the system displays the following details.
* Id
* Premises Id
* Division Street Name
* Full Name
* Address
* Annual value
* Notice Assessment
* Year
* User can Export and Print the Notice Assessment

#### Get Daily Receipt Summary report

* User can get the summary report of Daily receipts by selecting the Search by Date or Receipt Number option.
* Then, the system displays the details of the Daily Receipt summary.
* Also system facilitates the user to View, Export, and Print the report.

#### Receipt details overview

* System facilitates users to get paid Receipts, Cancel Receipts, and Receipt summary reports.
* User has to select the time duration, Account Year, User, and Recipe Order (Ascending, Descending).
* User can Save, Print, and View the Summary Report.

#### Daily receipt overview summary

* User can get the daily Receipt summary report by searching the date or Receipt number.
* After getting the Daily receipt list user clicks raw of details.
* Then, the system displays the Daily Rate Tax summary overview.

#### Search/Print Red note

* User can search the Red Notice by selecting the following details.
* Division
* Street Name,
* Year
* Quarter
* Due Date
* Notice Date
* Amount (Has given the option select to All, Less than, Greater than, between)
* Also user can change the property type.
* User can direct into print setting by clicking the “Red Notice Printer Settings.”
* User can print the Red Notice report.
* Following details are displayed in the red notice details
* ID
* Full Name
* Address
* Division
* Property Number
* Street Name
* Arrears

#### Get Credit/Debit details

* System facilitates to user get details of credit and debit.
* User has to select the time duration.
* Following details include in the credit and debit details report.
* Premises ID
* Type
* Pay Date
* Description
* Amount.
* Also, the user can search, export, and print the details report of credit and Debit.