ACCOUNT MGMT & SERVICE APPLICATION

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BRIEF **INTRODUCTION**

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TODAY'S **AGENDA**

1

Account Console
Asset Information

2

Account Console
Billing
Information /
Advanced Search

3

Service Application
Bad Debt

4

Service Application
Service Orders

5

Common Issues

6

Q&A
Session

Account Console

How To View Asset (Meter) Information

- Step 1 - Account Console View Mode

- Step 2 – Select A Service From Batch Grid

- Step 3 – Right Click; Choose Maintain Assets

Account Console

How To View Billing Information

- Step 1 – Account History Search for Billing Record

- Step 2 – Double Click on a Single Billing History Record

- Step 3 – Works in View Mode and Edit Mode

Service Application

How To Check For Potential Outstanding Debt

- Matching Records With Key Items:

    - Name

    - Social Security Number

    - Drivers License

    - Birth Date

- System Will Show Account Balances With Matching Key Items in **Red** Text

Service Application

What Kind of Service Orders Can Be Added

- Service Orders With Function Type
  - Miscellaneous
  - Work Orders

Common Issues

Getting Access to Meter Information Faster In Logics

Reviewing Balances on Multiple Account Owned By the Same Customer

Q&A

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