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Customer Inquiry

Friday: 8:30 – 9:30

Presenter: **Therese Powers**

Monitor: **Mark Meyer**

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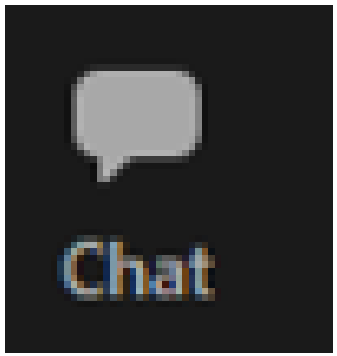
Communicating

- Q&A button found at bottom of screen. Use to ask questions of Presenter/Monitor. Everyone will see.
- Chat button found at bottom of screen. Use to communicate issues with Monitor. Only seen by yourself, monitor and presenter
- Scroll over the video image if you don’t see and it will appear at bottom of screen.



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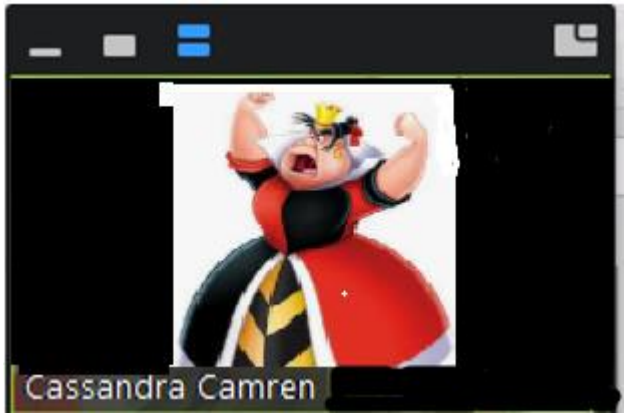
Presenter & Monitor Image

- The Presenter and Monitor images may block part of your screen.
- You can click on the bar above the pictures and drag it to another monitor or you can click on the single narrow line to hide their images.



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Housekeeping

Door Prize Winner

Nancy Kolberg

Shorewood Hills

Documents:

https://www.civicsystems.com/documents

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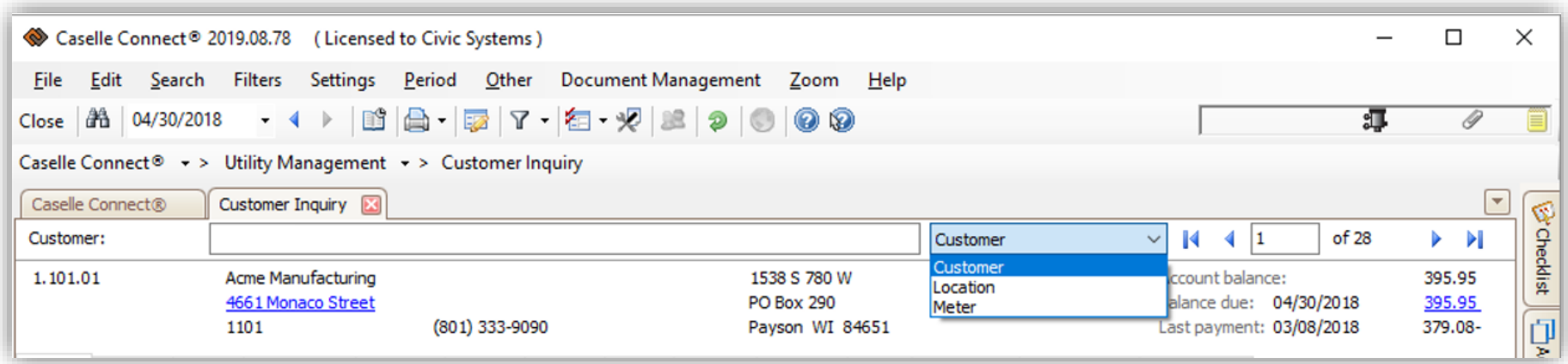
Customer Inquiry

Presenter: Therese Powers **Friday: 8:30 – 9:30**
Monitor: Mark Meyer

- Finding Accounts
  - Quick Search
  - Advance Search
- Customer Summary
  - Related Accounts
- Tabs
  - Display
  - Compare
  - History
  - Transactions
  - Customer
  - Services
  - Location
  - Meters
  - Credit History
- Icons
  - History Tracking
  - Print Options
  - Link to Modify Existing Customer
  - Filters
  - Options
  - Service Orders
  - Refresh
  - Help
  - What's this Help
- Status Tray

CUSTOMER INQUIRY
Finding an Account



Quick Search

- Customer – search by Name or Customer Number
- Location – search by Service Address, Location Number or Customer Number
- Meter – search by Meter Number or Service Address

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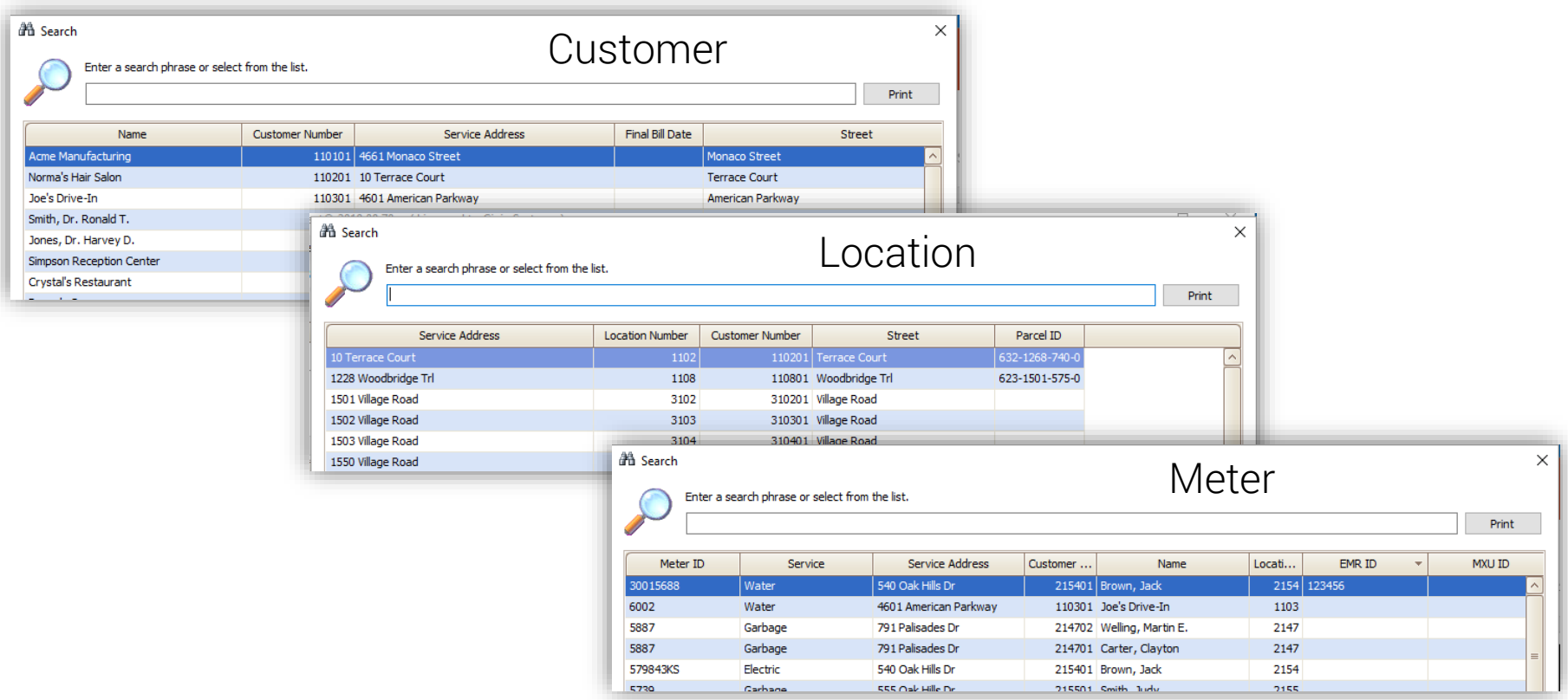
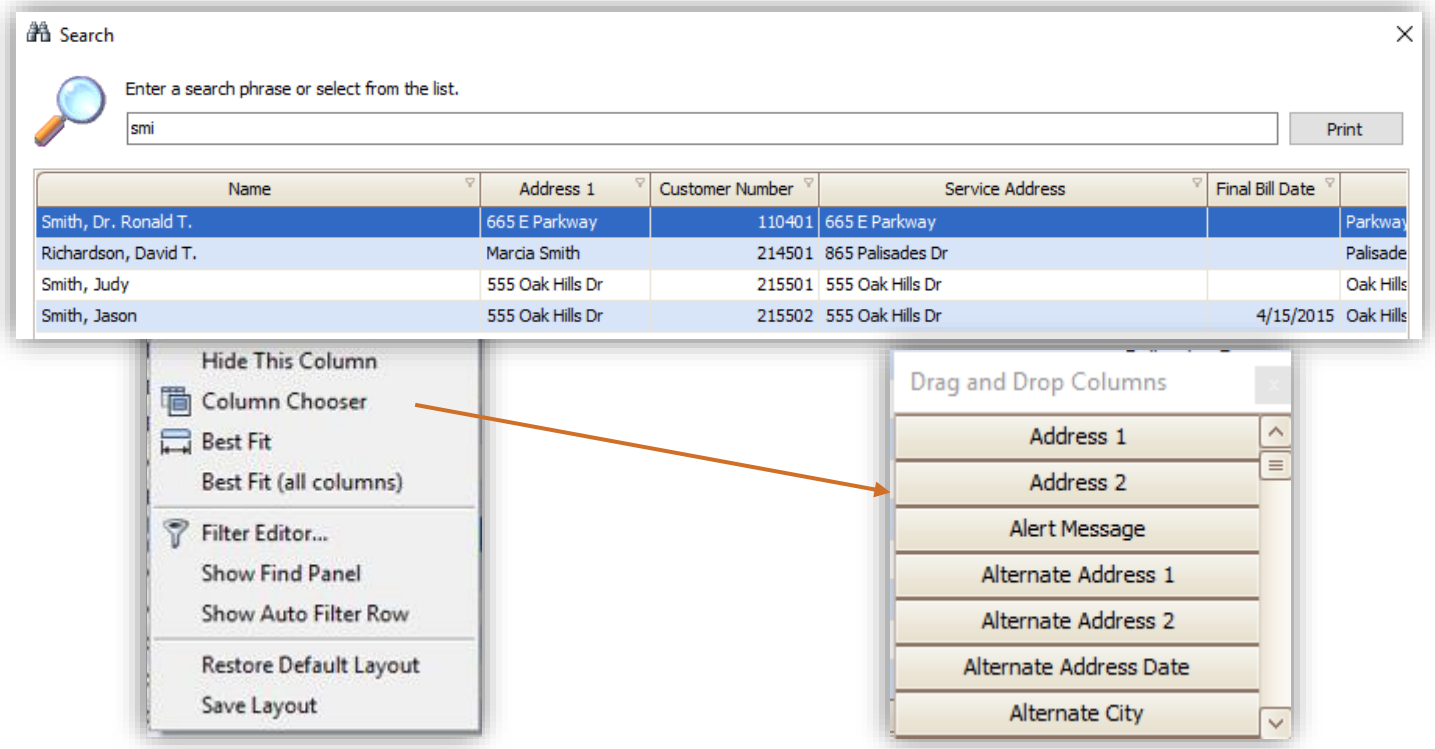
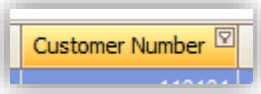
Advanced Search (F9)
Different based on the quick search option selected.



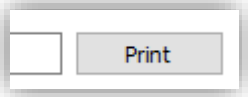
- Type in search, it searches on all fields displayed
  - Just start typing the wild card is assumed
- Add additional fields
  - Right click on the header > Select Column Chooser from the menu
    - Available fields depend on the quick search that was selected.
  - Example, select Address 1 from the Column Chooser. If the utility uses the Address 1 for additional names, they can now search for the additional names.



Filters can be used to refine your search as well.
Hover over the column header and click the filter icon that appears in the upper right corner.



Once the search criteria gives the results needed, the results can be printed by clicking the Print button next to the search field.

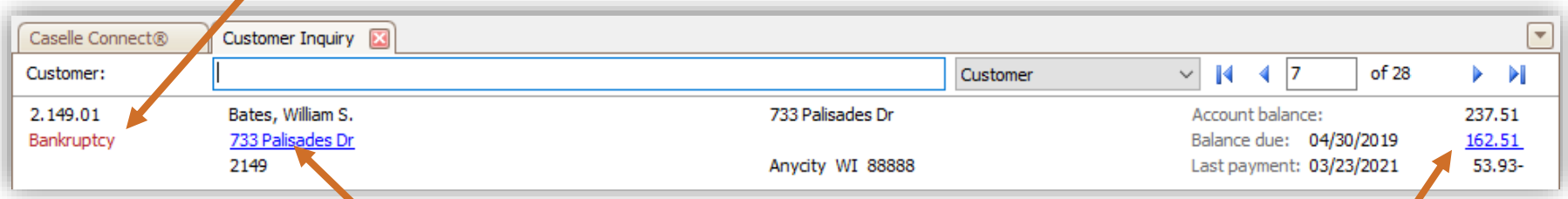


9/15/2021 Search: Page: 1

Name	Cosigner	Customer Number	Service Address	Final Bill Date	Street
Anycity School District - High School	ABC Managem	217101	1617 S Lake Rd		Lake Rd
Anycity School District - Middle School	ABC Managem	217201	1837 S Lake Rd		Lake Rd
Anycity School District - Elementary	ABC Managem	217301	1875 S Lake Rd		Lake Rd

Customer Summary

Collection Codes and Final or Disconnected statuses will appear in red under the customer number.



The service address links to Modify Location. (Can restrict access to Modify Location)

The Balance Due will link to payment entry.

The * next to Balance due means there are associated accounts with balances.

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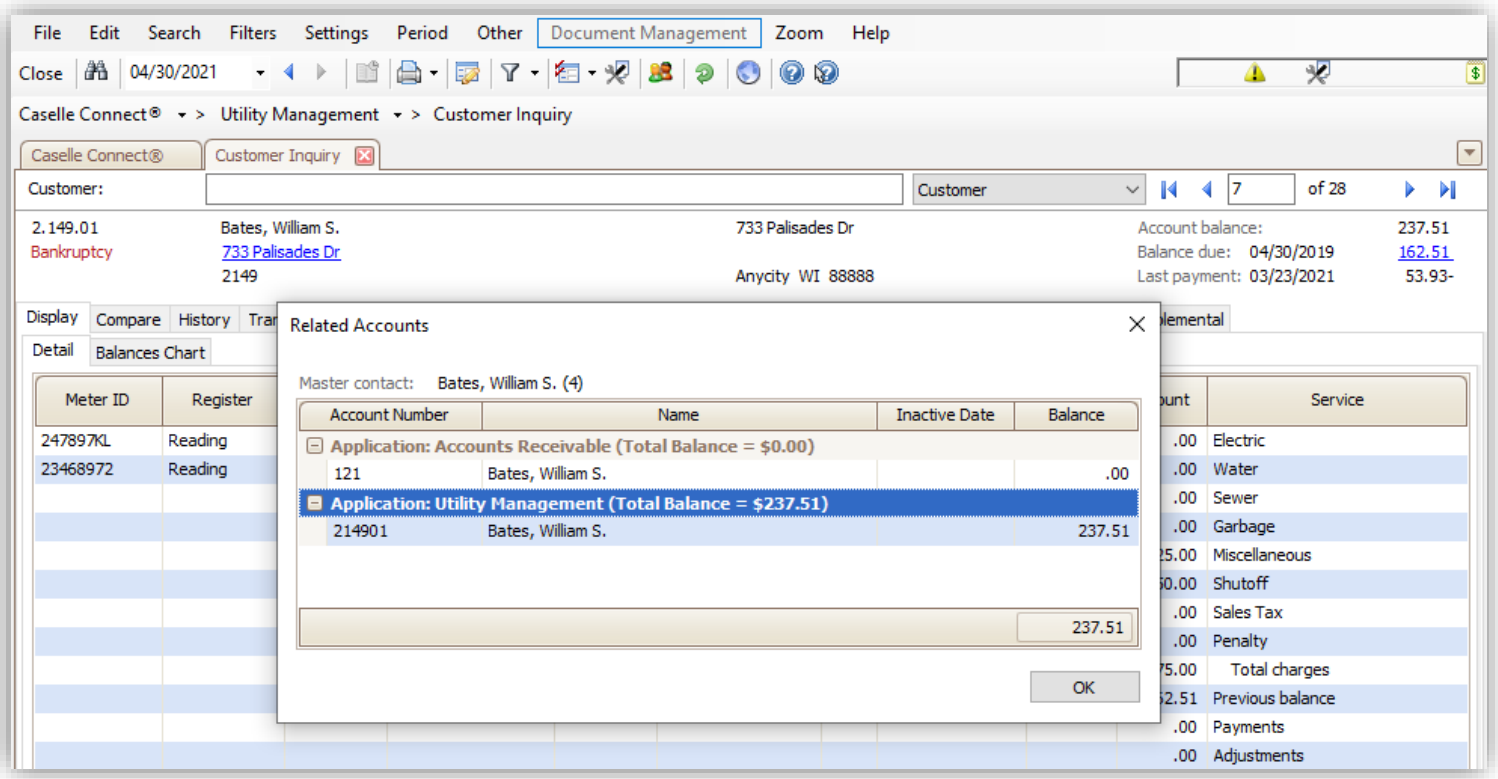
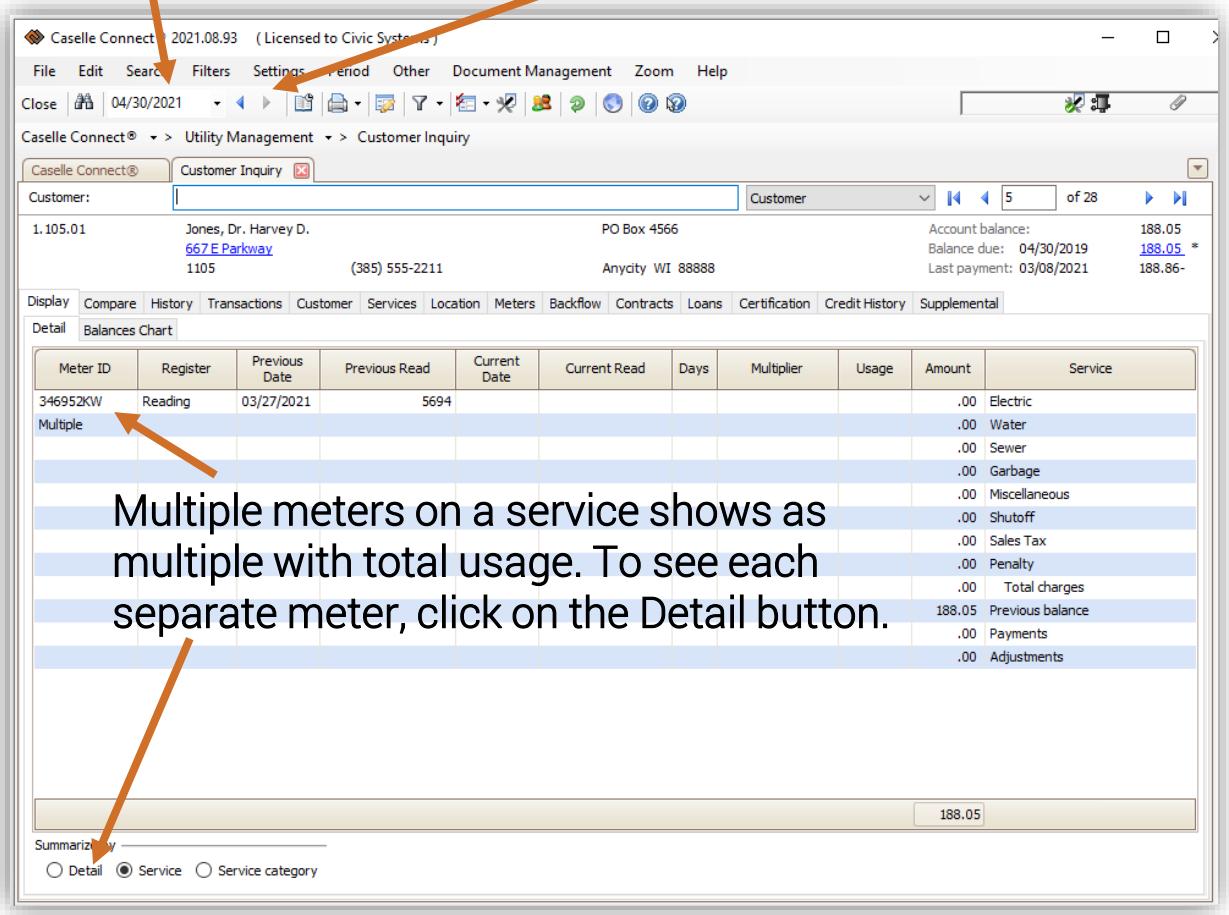
Click on the Show related accounts icon to see the associated accounts.



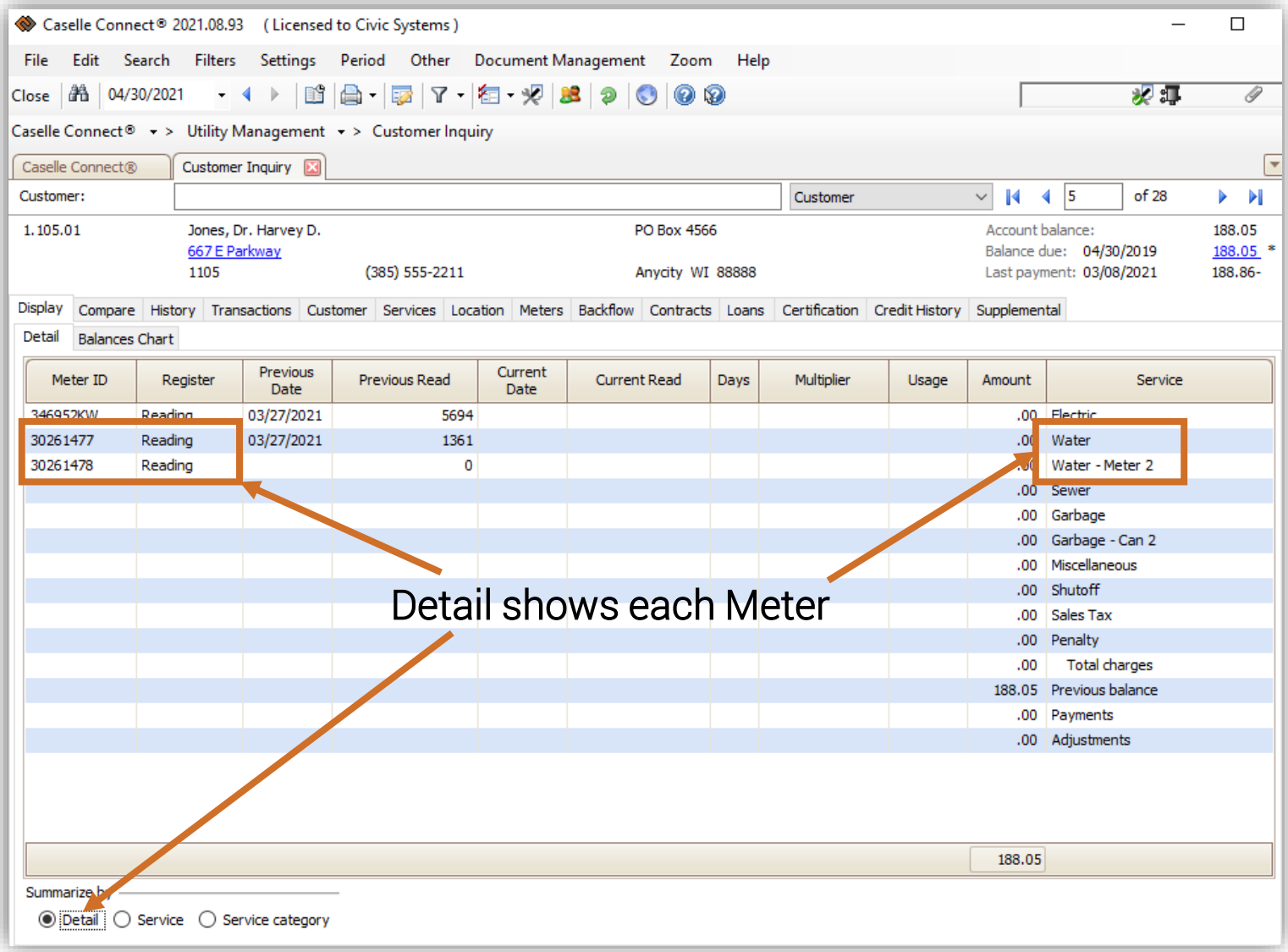
Display

The Display tab shows the billing detail for the current period ending date.

Use the arrow keys to navigate to different period for the displayed customer.

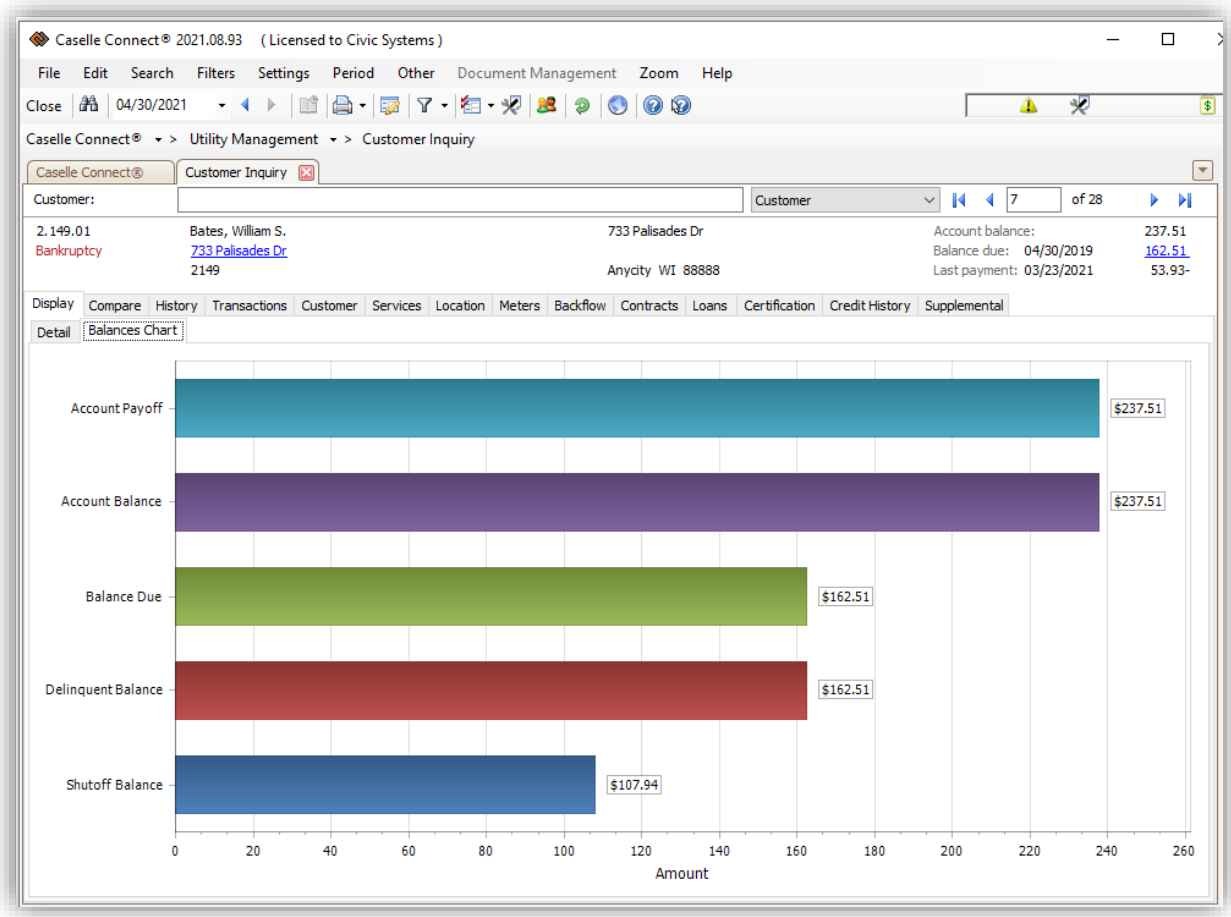


Display


Caselle Connect® 2021.08.93 (Licensed to Civic Systems)
File Edit Search Filters Settings Period Other Document Management Zoom Help
Close 04/30/2021
Caselle Connect® > Utility Management > Customer Inquiry
Caselle Connect® Customer Inquiry
Customer:
Customer 5 of 28
1.105.01 Jones, Dr. Harvey D. 667 E Parkway 1105 (385) 555-2211
PO Box 4566 Anycity WI 88888
Account balance: 188.05
Balance due: 04/30/2019 188.05
Last payment: 03/08/2021 188.86-
Display Compare History Transactions Customer Services Location Meters Backflow Contracts Loans Certification Credit History Supplemental
Detail Balances Chart
Meter ID | Register | Previous Date | Previous Read | Current Date | Current Read | Days | Multiplier | Usage | Amount | Service
346952KW Reading 03/27/2021 5694 .00 Electric
30261477 Reading 03/27/2021 1361 .00 Water
30261478 Reading 0 .00 Water - Meter 2
.00 Sewer
.00 Garbage
.00 Garbage - Can 2
.00 Miscellaneous
.00 Shutoff
.00 Sales Tax
.00 Penalty
.00 Total charges
188.05 Previous balance
.00 Payments
.00 Adjustments
188.05
Summarize by
Detail Service Service category
Detail shows each Meter

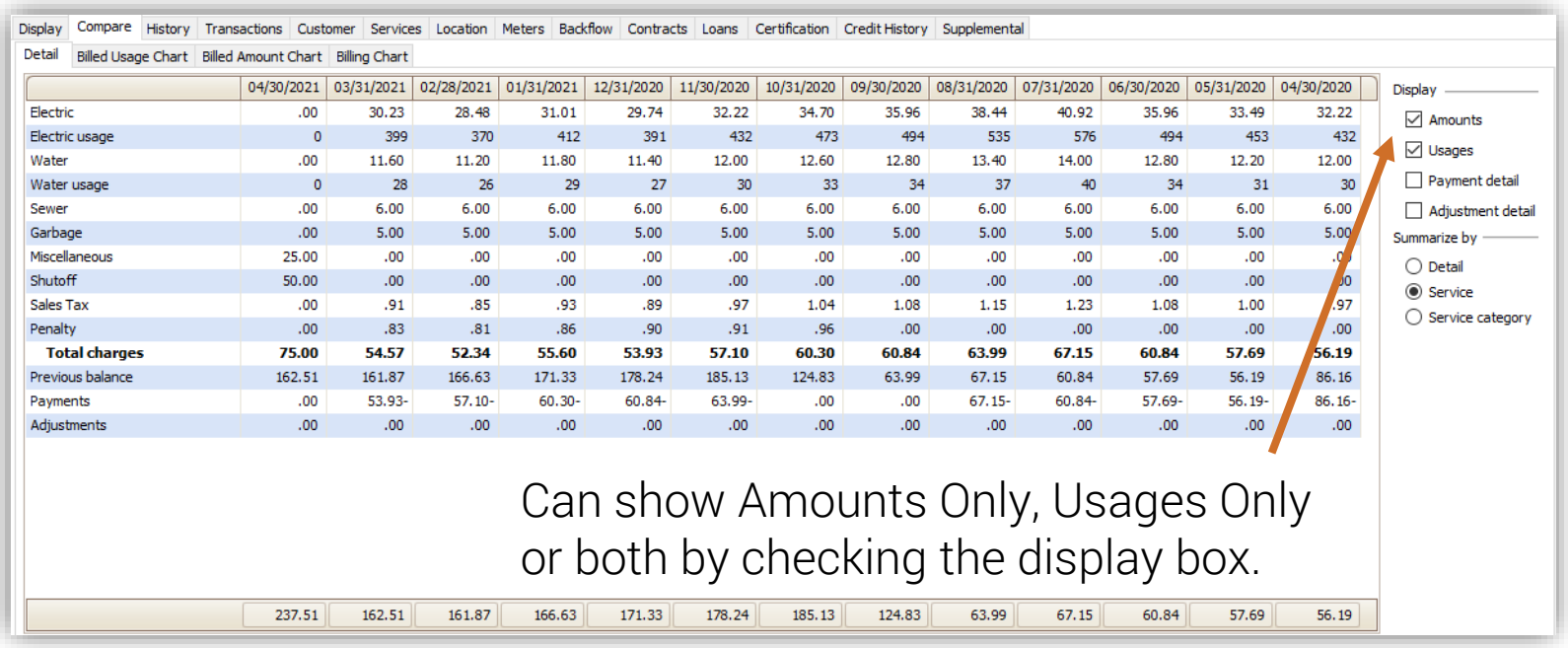
Display Balances Chart

This will display the different balances on the account graphically. The Account Payoff includes remaining balances from contracts and loans. The other balances displayed are Account Balance, Balance Due, Delinquent Balance and Shutoff Balance.



Compare

The compare tab shows up to 13 periods of billing history depending on the size of the window. No matter how many periods display the right-hand column is the same period last year.



	04/30/2021	03/31/2021	02/28/2021	01/31/2021	12/31/2020	11/30/2020	10/31/2020	09/30/2020	08/31/2020	07/31/2020	06/30/2020	05/31/2020	04/30/2020
Electric	.00	30.23	28.48	31.01	29.74	32.22	34.70	35.96	38.44	40.92	35.96	33.49	32.22
Electric usage	0	399	370	412	391	432	473	494	535	576	494	453	432
Water	.00	11.60	11.20	11.80	11.40	12.00	12.60	12.80	13.40	14.00	12.80	12.20	12.00
Water usage	0	28	26	29	27	30	33	34	37	40	34	31	30
Sewer	.00	6.00	6.00	6.00	6.00	6.00	6.00	6.00	6.00	6.00	6.00	6.00	6.00
Garbage	.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00
Miscellaneous	25.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00
Shutoff	50.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00
Sales Tax	.00	.91	.85	.93	.89	.97	1.04	1.08	1.15	1.23	1.08	1.00	.97
Penalty	.00	.83	.81	.86	.90	.91	.96	.00	.00	.00	.00	.00	.00
Total charges	**75.00**	**54.57**	**52.34**	**55.60**	**53.93**	**57.10**	**60.30**	**60.84**	**63.99**	**67.15**	**60.84**	**57.69**	**56.19**
Previous balance	162.51	161.87	166.63	171.33	178.24	185.13	124.83	63.99	67.15	60.84	57.69	56.19	86.16
Payments	.00	53.93-	57.10-	60.30-	60.84-	63.99-	.00	.00	67.15-	60.84-	57.69-	56.19-	86.16-
Adjustments	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00
	237.51	162.51	161.87	166.63	171.33	178.24	185.13	124.83	63.99	67.15	60.84	57.69	56.19

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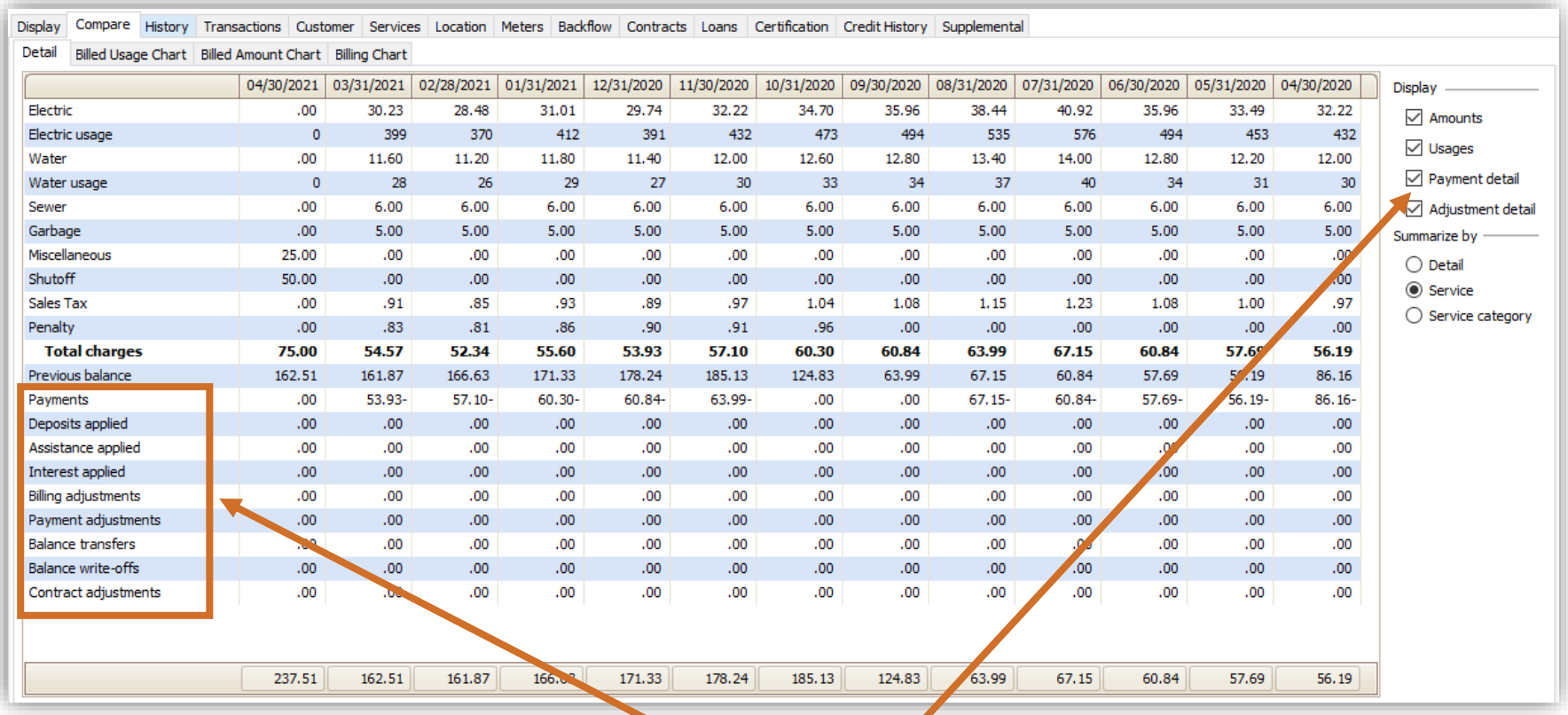
Compare

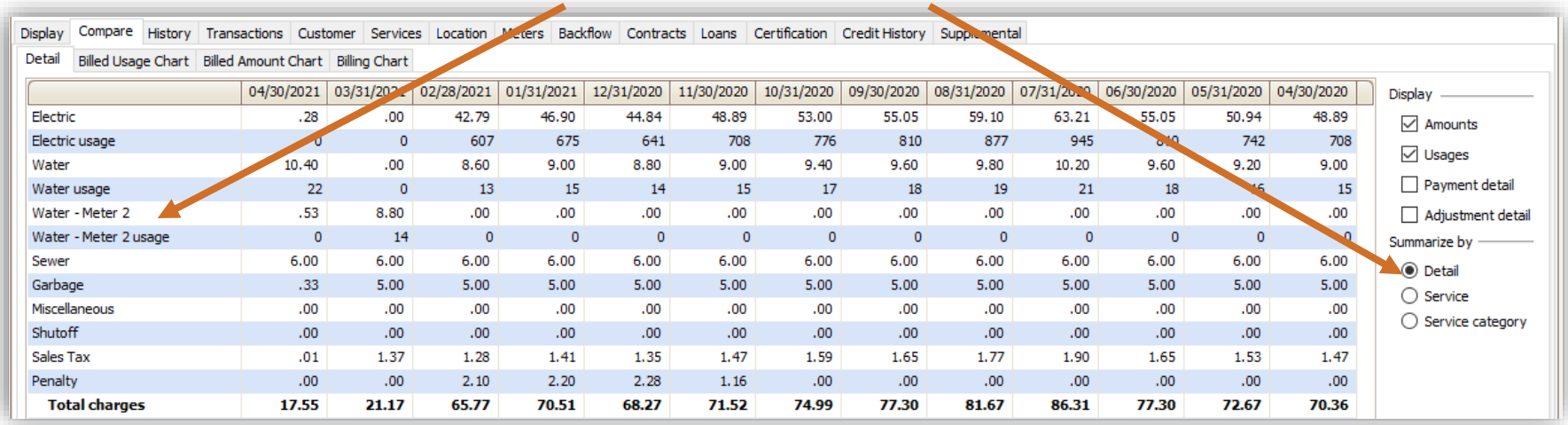


	04/30/2021	03/31/2021	02/28/2021	01/31/2021	12/31/2020	11/30/2020	10/31/2020	09/30/2020	08/31/2020	07/31/2020	06/30/2020	05/31/2020	04/30/2020
Electric	.00	30.23	28.48	31.01	29.74	32.22	34.70	35.96	38.44	40.92	35.96	33.49	32.22
Electric usage	0	399	370	412	391	432	473	494	535	576	494	453	432
Water	.00	11.60	11.20	11.80	11.40	12.00	12.60	12.80	13.40	14.00	12.80	12.20	12.00
Water usage	0	28	26	29	27	30	33	34	37	40	34	31	30
Sewer	.00	6.00	6.00	6.00	6.00	6.00	6.00	6.00	6.00	6.00	6.00	6.00	6.00
Garbage	.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00
Miscellaneous	25.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00
Shutoff	50.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00
Sales Tax	.00	.91	.85	.93	.89	.97	1.04	1.08	1.15	1.23	1.08	1.00	.97
Penalty	.00	.83	.81	.86	.90	.91	.96	.00	.00	.00	.00	.00	.00
Total charges	**75.00**	**54.57**	**52.34**	**55.60**	**53.93**	**57.10**	**60.30**	**60.84**	**63.99**	**67.15**	**60.84**	**57.69**	**56.19**
Previous balance	162.51	161.87	166.63	171.33	178.24	185.13	124.83	63.99	67.15	60.84	57.69	56.19	86.16
Payments	.00	53.93-	57.10-	60.30-	60.84-	63.99-	.00	.00	67.15-	60.84-	57.69-	56.19-	86.16-
Deposits applied	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00
Assistance applied	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00
Interest applied	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00
Billing adjustments	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00
Payment adjustments	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00
Balance transfers	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00
Balance write-offs	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00
Contract adjustments	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00
	237.51	162.51	161.87	166.63	171.33	178.24	185.13	124.83	63.99	67.15	60.84	57.69	56.19

Can show detail for payments and adjustments by checking the display boxes.

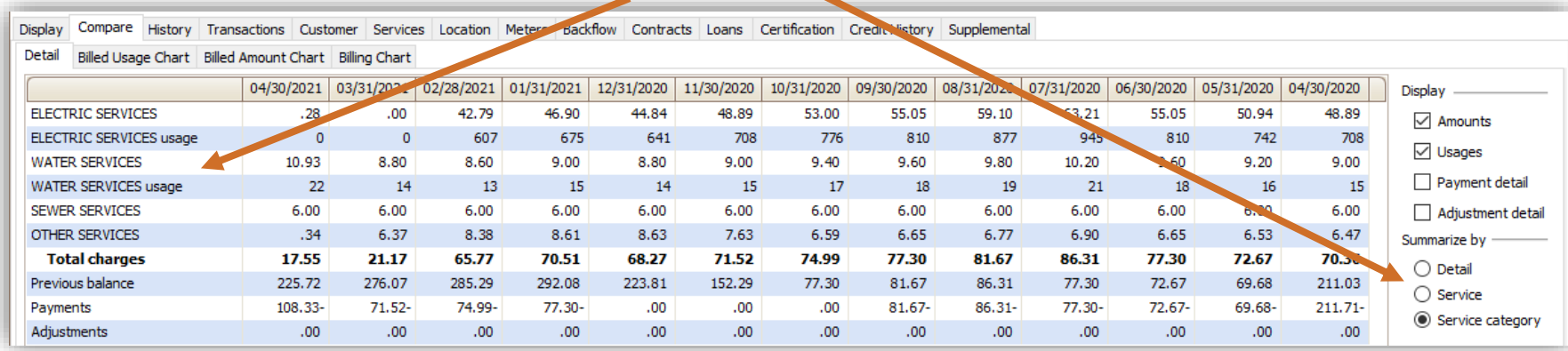
Compare

The data on the compare screen can be viewed 3 ways. By service is the default. Detail shows each meter when there are multiple meters.



	04/30/2021	03/31/2021	02/28/2021	01/31/2021	12/31/2020	11/30/2020	10/31/2020	09/30/2020	08/31/2020	07/31/2020	06/30/2020	05/31/2020	04/30/2020
Electric	.28	.00	42.79	46.90	44.84	48.89	53.00	55.05	59.10	63.21	55.05	50.94	48.89
Electric usage	0	0	607	675	641	708	776	810	877	945	810	742	708
Water	10.40	.00	8.60	9.00	8.80	9.00	9.40	9.60	9.80	10.20	9.60	9.20	9.00
Water usage	22	0	13	15	14	15	17	18	19	21	18	16	15
Water - Meter 2	.53	8.80	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00
Water - Meter 2 usage	0	14	0	0	0	0	0	0	0	0	0	0	0
Sewer	6.00	6.00	6.00	6.00	6.00	6.00	6.00	6.00	6.00	6.00	6.00	6.00	6.00
Garbage	.33	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00
Miscellaneous	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00
Shutoff	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00
Sales Tax	.01	1.37	1.28	1.41	1.35	1.47	1.59	1.65	1.77	1.90	1.65	1.53	1.47
Penalty	.00	.00	2.10	2.20	2.28	1.16	.00	.00	.00	.00	.00	.00	.00
Total charges	**17.55**	**21.17**	**65.77**	**70.51**	**68.27**	**71.52**	**74.99**	**77.30**	**81.67**	**86.31**	**77.30**	**72.67**	**70.36**

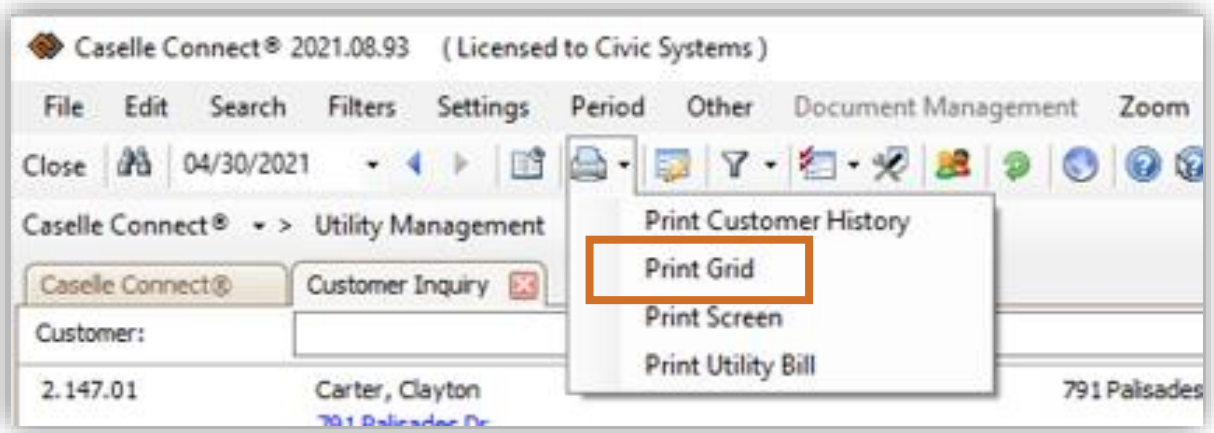
Service category totals by service category



	04/30/2021	03/31/2021	02/28/2021	01/31/2021	12/31/2020	11/30/2020	10/31/2020	09/30/2020	08/31/2020	07/31/2020	06/30/2020	05/31/2020	04/30/2020
ELECTRIC SERVICES	.28	.00	42.79	46.90	44.84	48.89	53.00	55.05	59.10	63.21	55.05	50.94	48.89
ELECTRIC SERVICES usage	0	0	607	675	641	708	776	810	877	945	810	742	708
WATER SERVICES	10.93	8.80	8.60	9.00	8.80	9.00	9.40	9.60	9.80	10.20	9.60	9.20	9.00
WATER SERVICES usage	22	14	13	15	14	15	17	18	19	21	18	16	15
SEWER SERVICES	6.00	6.00	6.00	6.00	6.00	6.00	6.00	6.00	6.00	6.00	6.00	6.00	6.00
OTHER SERVICES	.34	6.37	8.38	8.61	8.63	7.63	6.59	6.65	6.77	6.90	6.65	6.53	6.47
Total charges	**17.55**	**21.17**	**65.77**	**70.51**	**68.27**	**71.52**	**74.99**	**77.30**	**81.67**	**86.31**	**77.30**	**72.67**	**70.36**
Previous balance	225.72	276.07	285.29	292.08	223.81	152.29	77.30	81.67	86.31	77.30	72.67	69.68	211.03
Payments	108.33-	71.52-	74.99-	77.30-	.00	.00	.00	81.67-	86.31-	77.30-	72.67-	69.68-	211.71-
Adjustments	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00

Compare

The compare tab is a great one to use Connect's Print Grid option to print history.



Anycity Corporation

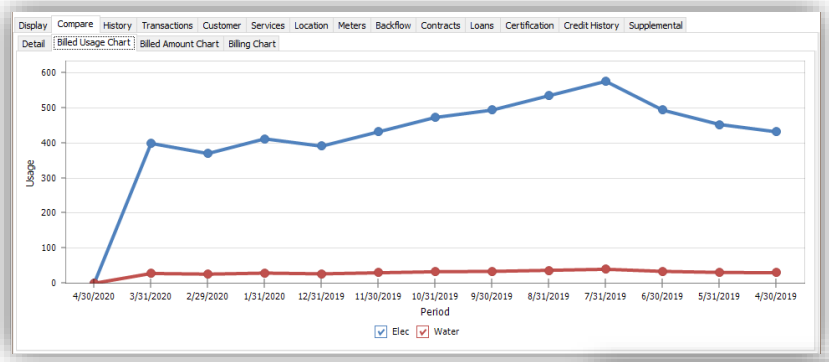
Customer Inquiry - Compare
2.147.01, Clayton Carter, 791 Palisades Dr

9/15/2021
Page: 1

	04/30/2021	03/31/2021	02/28/2021	01/31/2021	12/31/2020	11/30/2020	10/31/2020	09/30/2020	08/31/2020	07/31/2020	06/30/2020	05/31/2020	04/30/2020
Electric	.28	.00	42.79	46.90	44.84	48.89	53.00	55.05	59.10	63.21	55.05	50.94	48.89
Electric usage	0	0	607	675	641	708	776	810	877	945	810	742	708
Water	10.93	8.80	8.60	9.00	8.80	9.00	9.40	9.60	9.80	10.20	9.60	9.20	9.00
Water usage	22	14	13	15	14	15	17	18	19	21	18	16	15
Sewer	6.00	6.00	6.00	6.00	6.00	6.00	6.00	6.00	6.00	6.00	6.00	6.00	6.00
Garbage	.33	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00
Miscellaneous	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00
Shutoff	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00
Sales Tax	.01	1.37	1.28	1.41	1.35	1.47	1.59	1.65	1.77	1.90	1.65	1.53	1.47
Penalty	.00	.00	2.10	2.20	2.28	1.16	.00	.00	.00	.00	.00	.00	.00
Total charges	**17.55**	**21.17**	**65.77**	**70.51**	**68.27**	**71.52**	**74.99**	**77.30**	**81.67**	**86.31**	**77.30**	**72.67**	**70.36**
Previous balance	225.72	276.07	285.29	292.08	223.81	152.29	77.30	81.67	86.31	77.30	72.67	69.68	211.03
Payments	108.33-	71.52-	74.99-	77.30-	.00	.00	.00	81.67-	86.31-	77.30-	72.67-	69.68-	211.71-
Adjustments	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00
	134.94	225.72	276.07	285.29	292.08	223.81	152.29	77.30	81.67	86.31	77.30	72.67	69.68

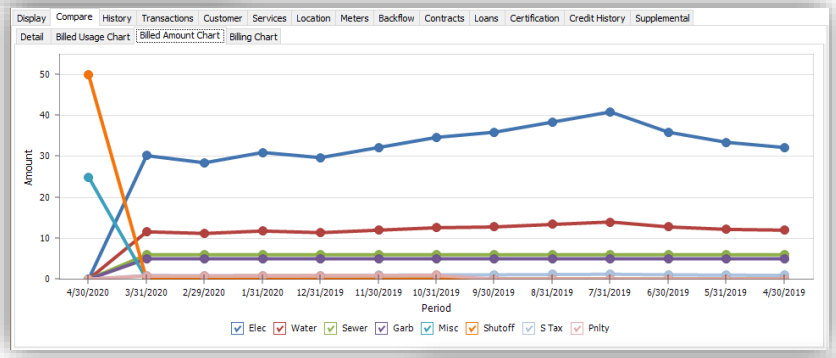
Compare Charts

Compare has 3 chart options that can also be printed with Print Grid.

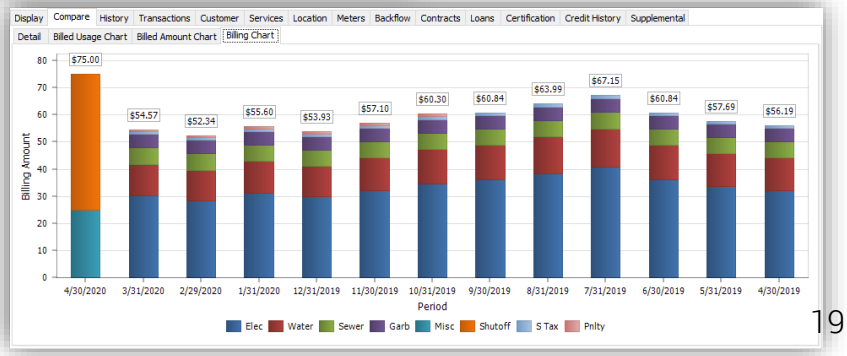


The Billing Usage Chart graphs the usage for the metered services. The services to display can be selected at the bottom.

The Billed Amount Chart graphs the dollar amounts billed for each service. The service to display can be selected at the bottom.

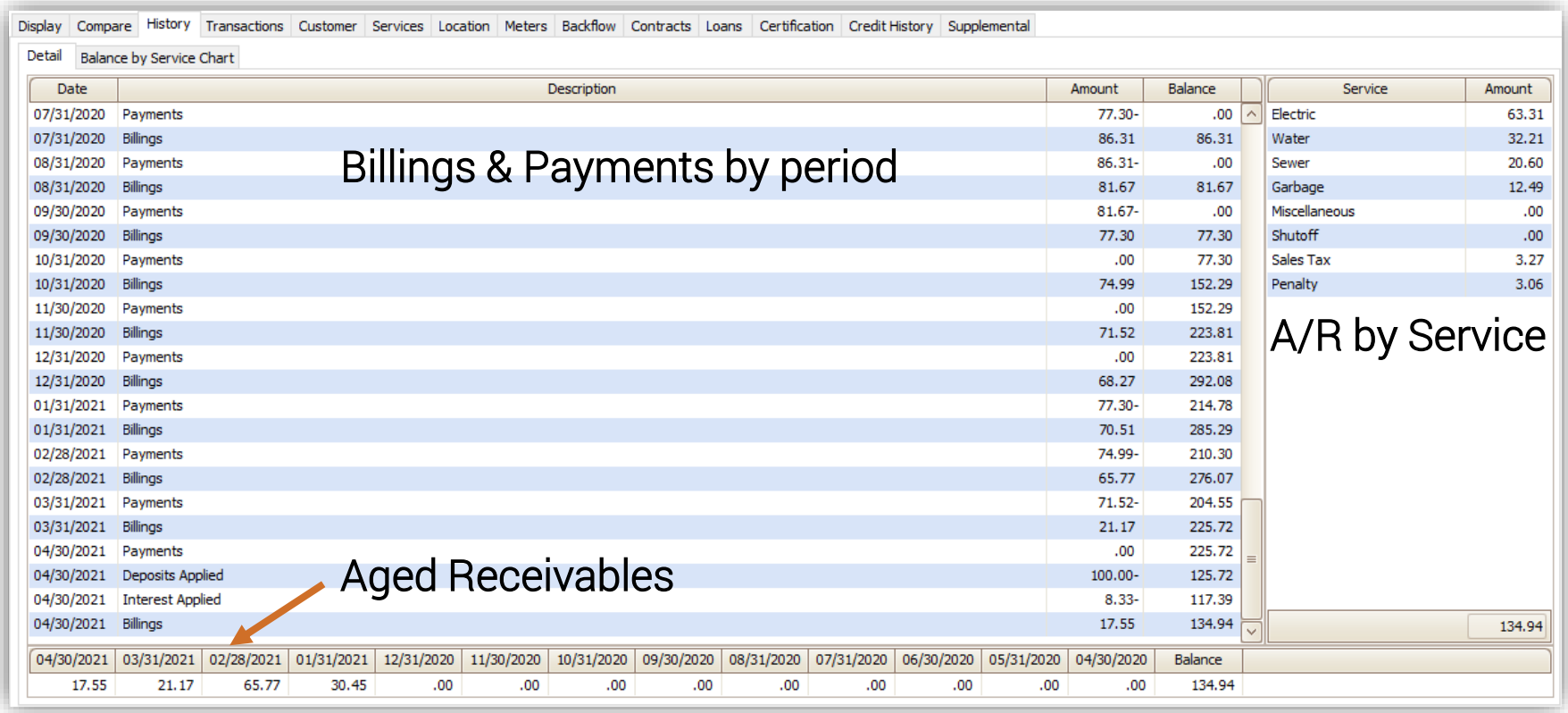


The Billing Chart is another graphical representation of the amounts billed for each service.



History

The history screen has 3 separate sections:
The main section is a recap of Billings and Payments by period with a running AR balance.
A/R by Service shows the current balance in each service. Previous period balances can be displayed by changing the period date in the icon bar.
The bottom section is the aged receivables.



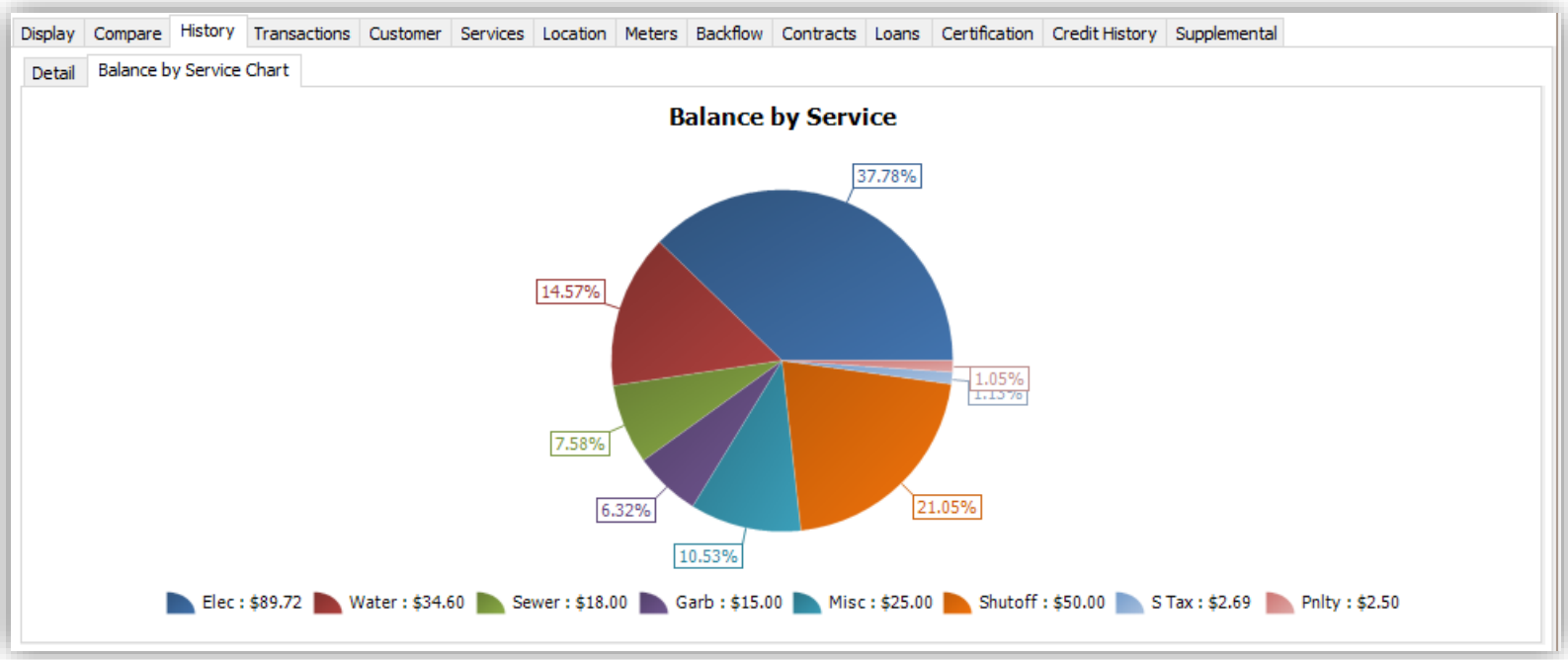
Date	Description	Amount	Balance
07/31/2020	Payments	77.30-	.00
07/31/2020	Billings	86.31	86.31
08/31/2020	Payments	86.31-	.00
08/31/2020	Billings	81.67	81.67
09/30/2020	Payments	81.67-	.00
09/30/2020	Billings	77.30	77.30
10/31/2020	Payments	.00	77.30
10/31/2020	Billings	74.99	152.29
11/30/2020	Payments	.00	152.29
11/30/2020	Billings	71.52	223.81
12/31/2020	Payments	.00	223.81
12/31/2020	Billings	68.27	292.08
01/31/2021	Payments	77.30-	214.78
01/31/2021	Billings	70.51	285.29
02/28/2021	Payments	74.99-	210.30
02/28/2021	Billings	65.77	276.07
03/31/2021	Payments	71.52-	204.55
03/31/2021	Billings	21.17	225.72
04/30/2021	Payments	.00	225.72
04/30/2021	Deposits Applied	100.00-	125.72
04/30/2021	Interest Applied	8.33-	117.39
04/30/2021	Billings	17.55	134.94

Service	Amount
Electric	63.31
Water	32.21
Sewer	20.60
Garbage	12.49
Miscellaneous	.00
Shutoff	.00
Sales Tax	3.27
Penalty	3.06
	134.94

04/30/2021	03/31/2021	02/28/2021	01/31/2021	12/31/2020	11/30/2020	10/31/2020	09/30/2020	08/31/2020	07/31/2020	06/30/2020	05/31/2020	04/30/2020	Balance
17.55	21.17	65.77	30.45	.00	.00	.00	.00	.00	.00	.00	.00	.00	134.94

History Balance by Service Chart

The Balance by Service Chart displays the service balances as a Pie Chart. It shows each service as a percentage of the account balance. This chart can also be printed with Print Grid.



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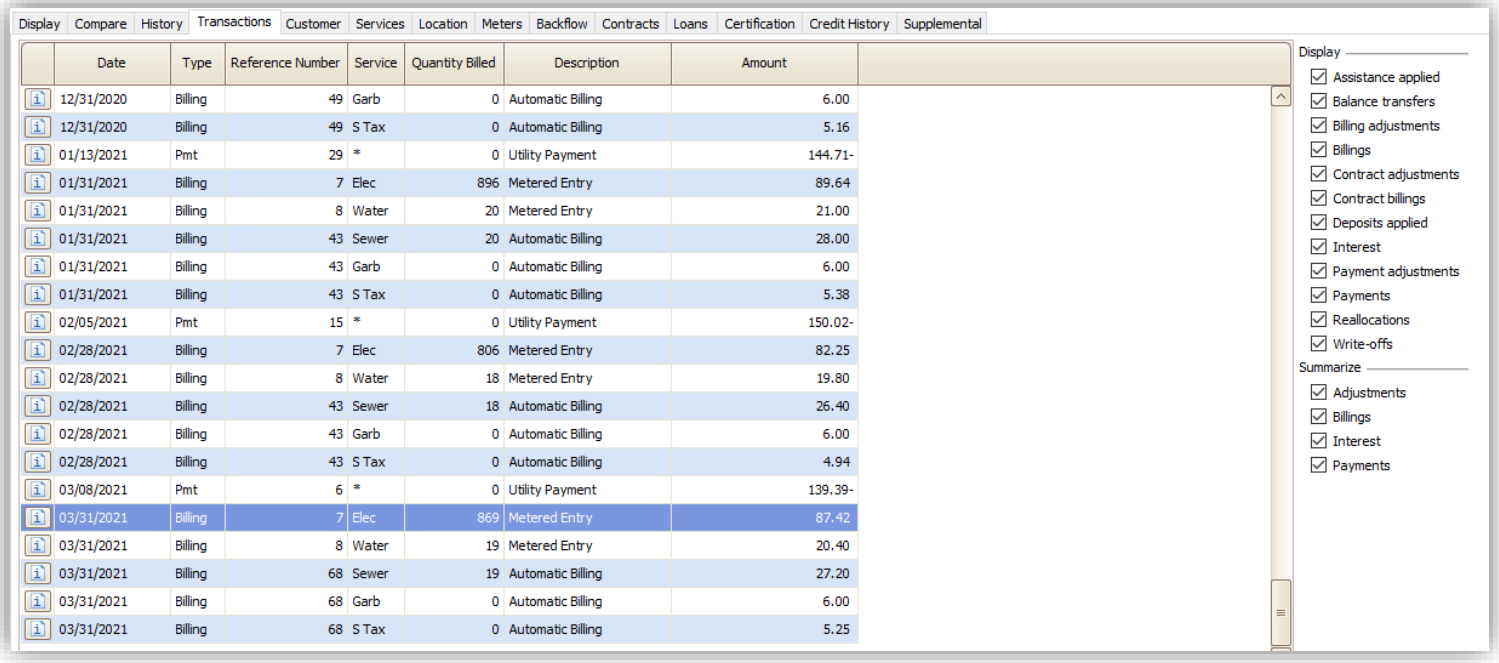
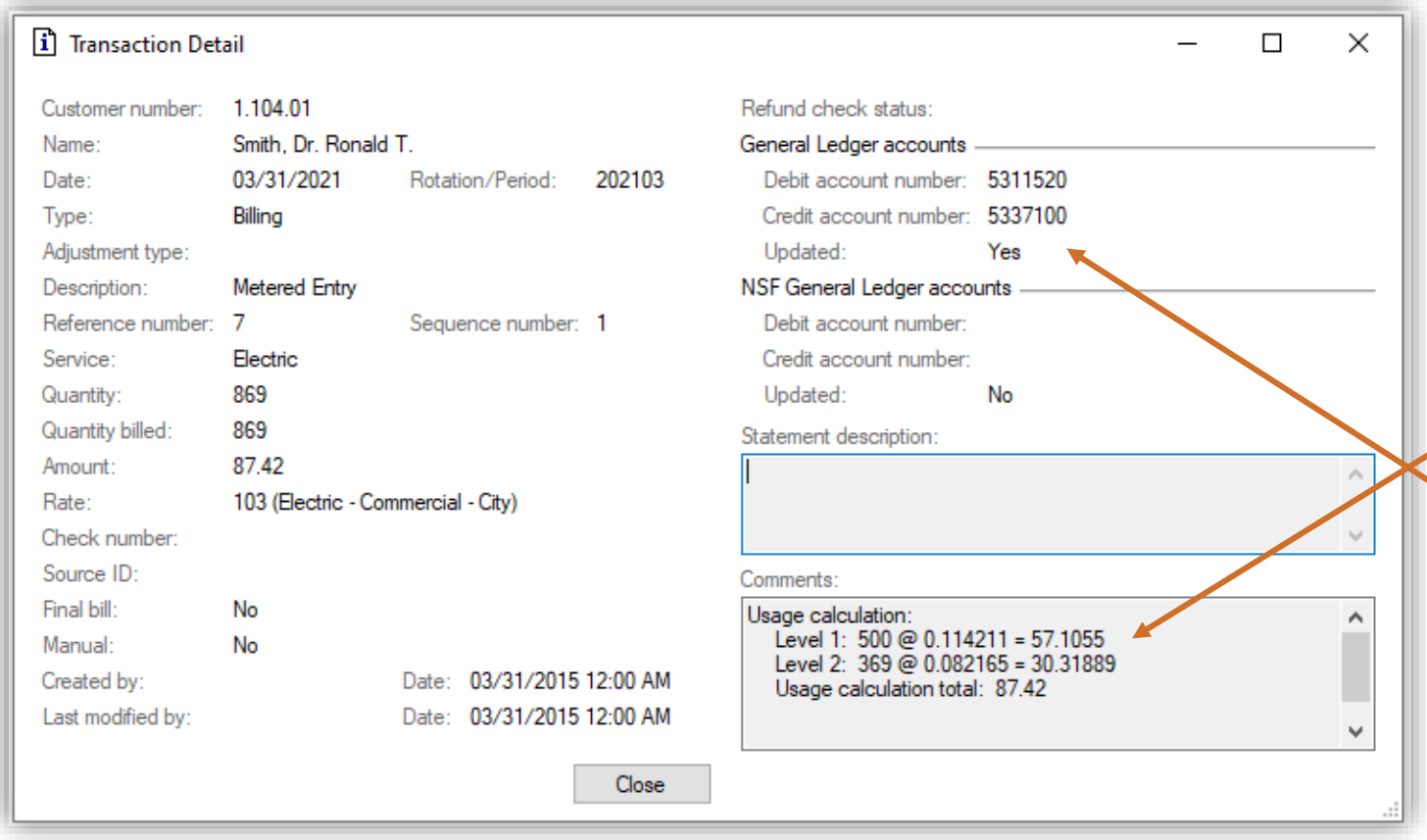
Transactions

The transactions screen shows each financial transaction on the customer..
The column on the right shows all the transaction types that are being displayed.
To remove certain types of transactions from the display, uncheck the box.
An * means the transaction is a summarized total. To see the detail, uncheck the box for that transaction type under summarize on the bottom right side



Transaction Detail

To see more detail for a specific transaction either double click on it or click the on the right side of the transaction (in Connect).



Transaction Detail is available showing more information about the transaction, including how it was calculated and which GL Accounts were used for the transaction..

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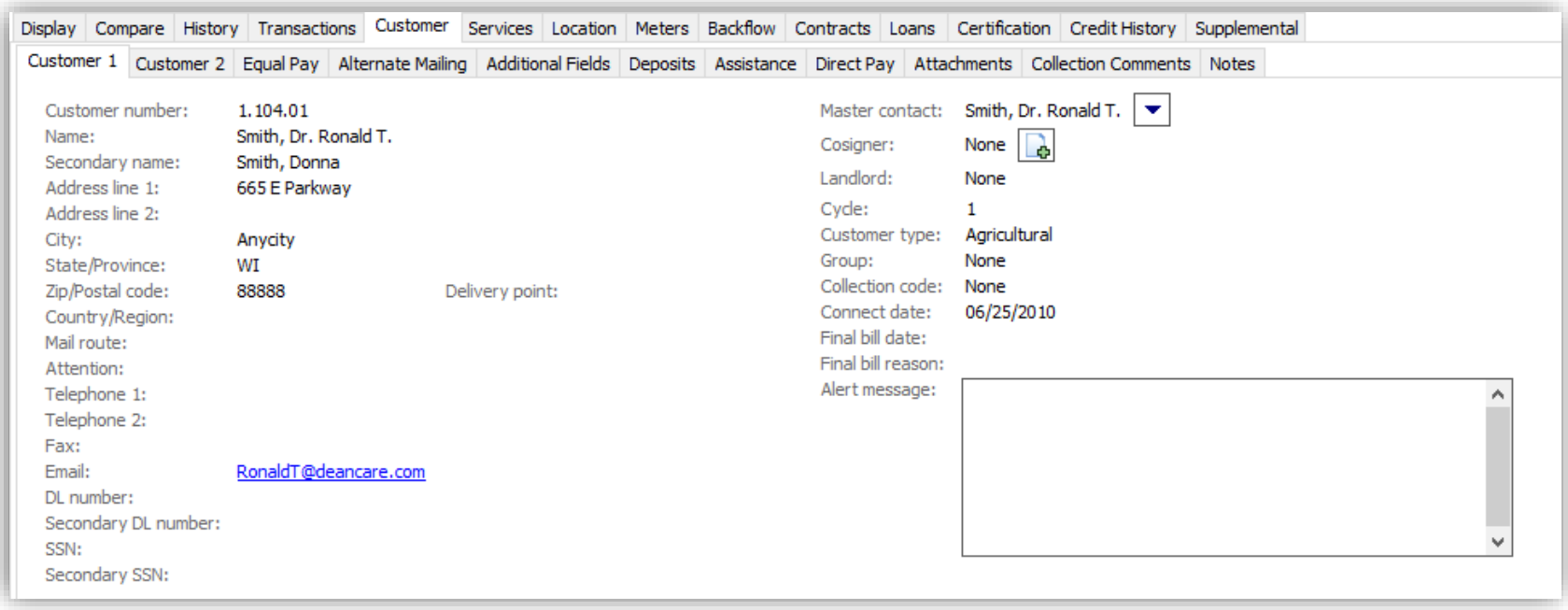
Questions?

Customer

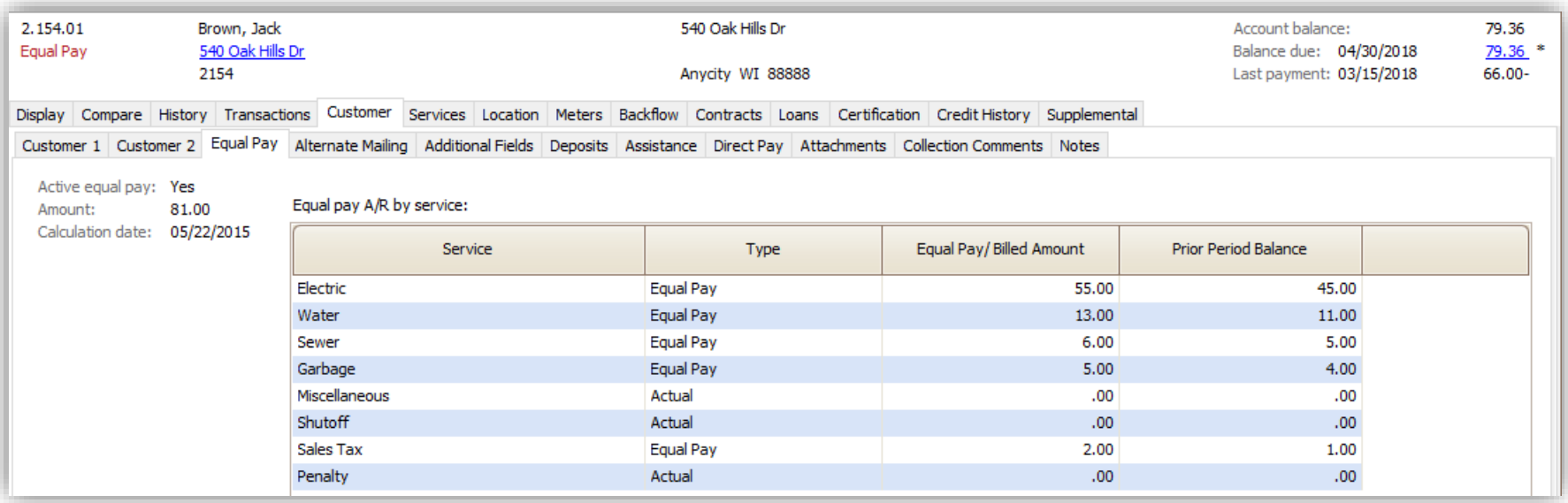
The Customer screen is comprised of several screens with customer specific information.
Customer 1 includes contact information, Cosigner/landlord and master contact and general customer account information



Customer 2 is rarely used unless you have Xpress Bill Pay or use Landlords

Customer

The Equal Pay screen shows the budget amount and when the budget was last calculated. If a customer has Equal Pay it will display under their customer number. The Account Balance and Balance Due are the actual balances on the account, not the Equal Pay balance.



Service	Type	Equal Pay/ Billed Amount	Prior Period Balance
Electric	Equal Pay	55.00	45.00
Water	Equal Pay	13.00	11.00
Sewer	Equal Pay	6.00	5.00
Garbage	Equal Pay	5.00	4.00
Miscellaneous	Actual	.00	.00
Shutoff	Actual	.00	.00
Sales Tax	Equal Pay	2.00	1.00
Penalty	Actual	.00	.00

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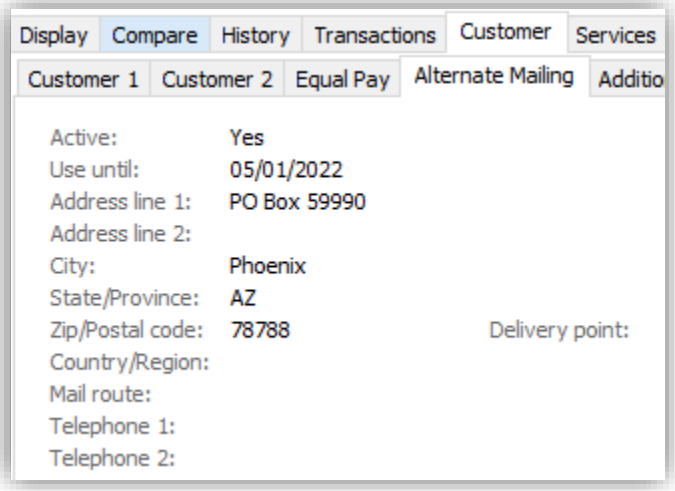
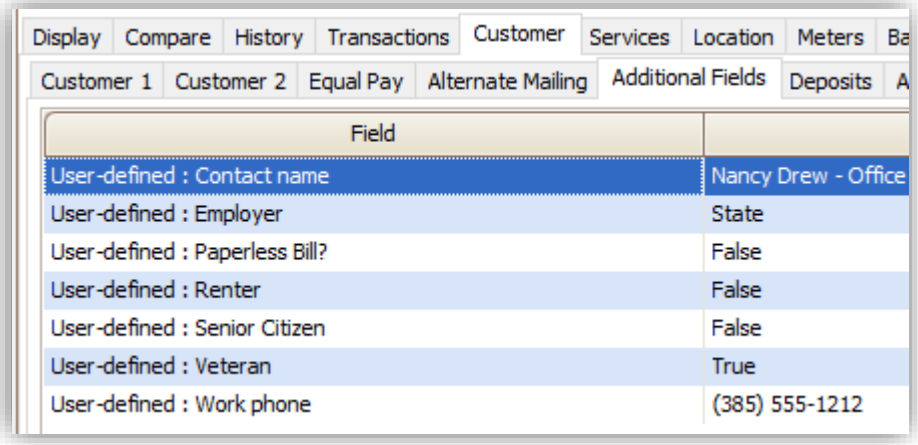
Customer

The Alternate Mailing Address is used to send mailings to a different address for a limited period of time. For example, snowbirds may want to receive their bills at their southern address for the winter. You can activate and deactivate the address by date or by checking the active box.

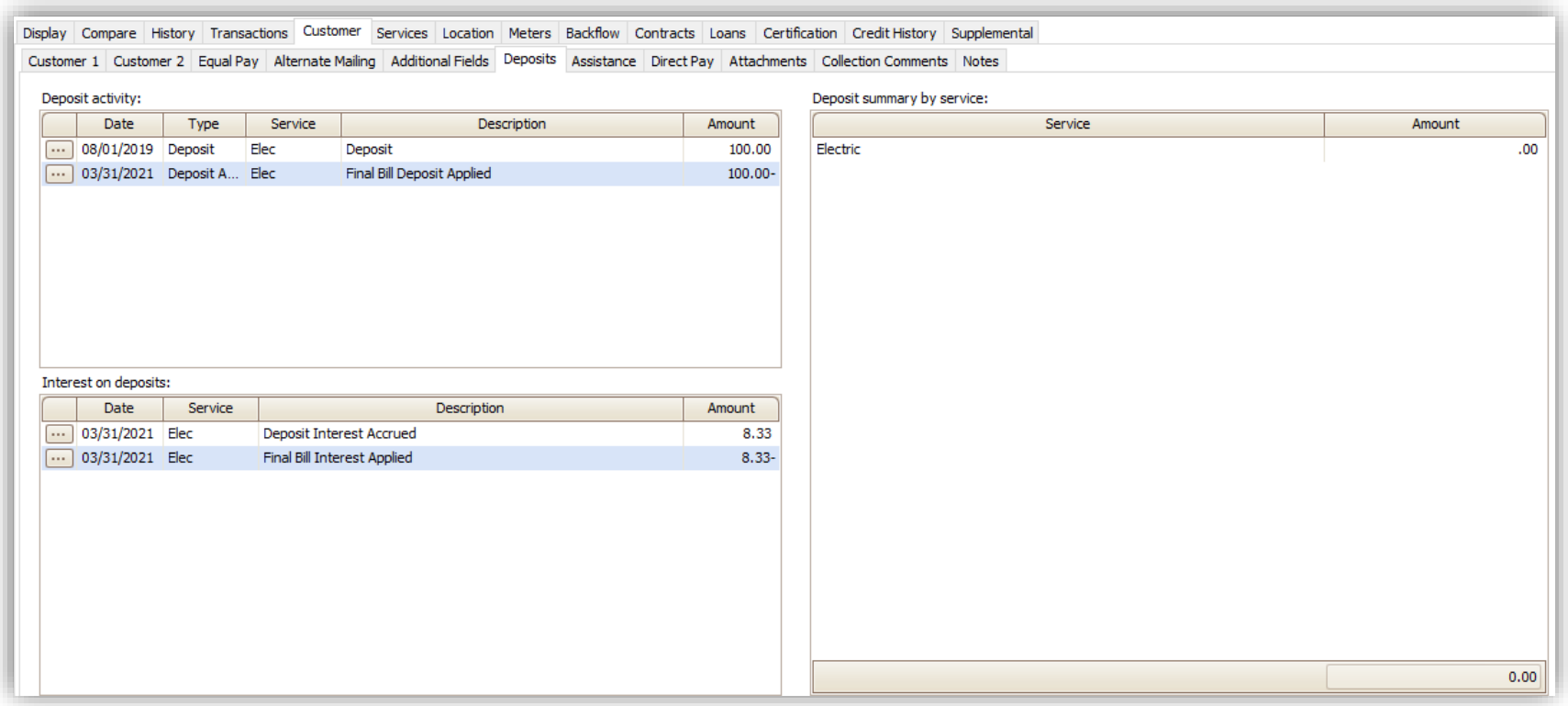


Customer User Defined Field values are displayed in Additional Fields.



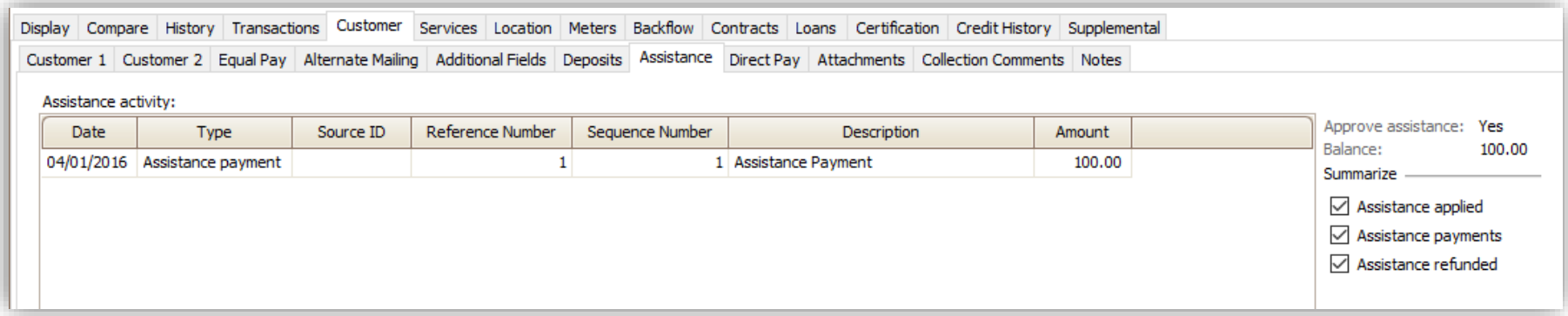
Customer

Deposit information is available on the deposit screen. It will show deposit activity such as deposits received applied or refunded and, interest accrued, applied or refunded and a summary of the deposit activity.

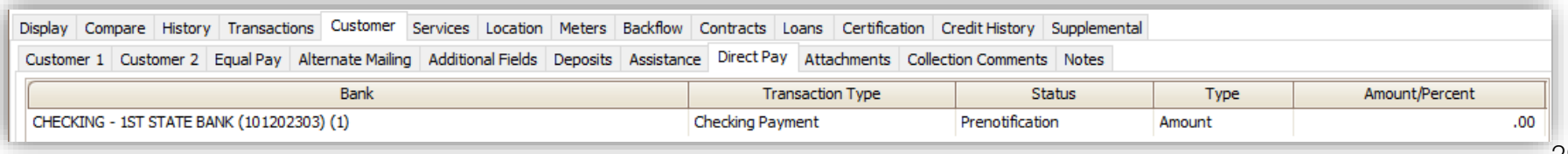


Customer

Energy Assistance is used when a large payment is received that is intended to be applied to energy services throughout the heating season. If the payment is applied directly to the customer's account, it will most likely create a credit balance and then the customer won't pay the balance of their other services with each billing. The payment is entered into Energy Assistance and the applied to the energy services prior to printing the bill, so the bill will go out for the balance of the other services and show that the energy services have been paid. This screen will track how much of the Energy Assistance Payment has been applied and how much is remaining.

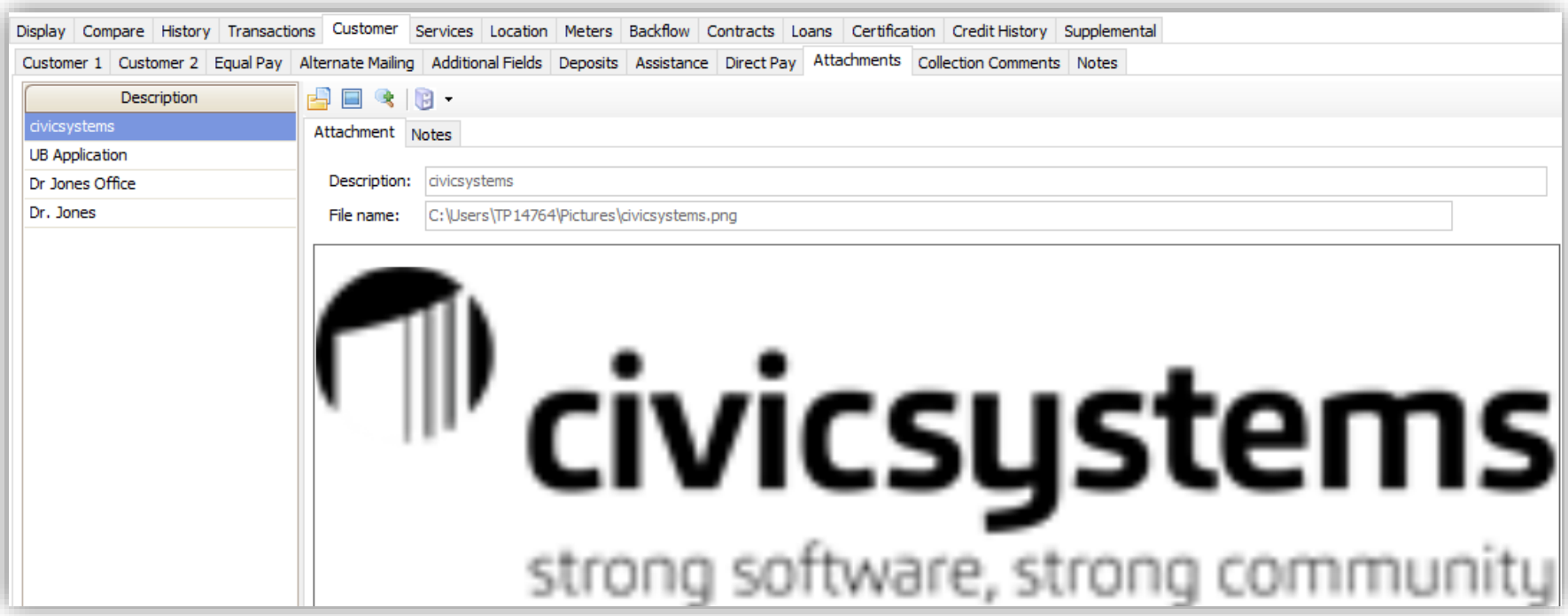


Direct Pay shows the bank and direct pay status for ACH Customers.



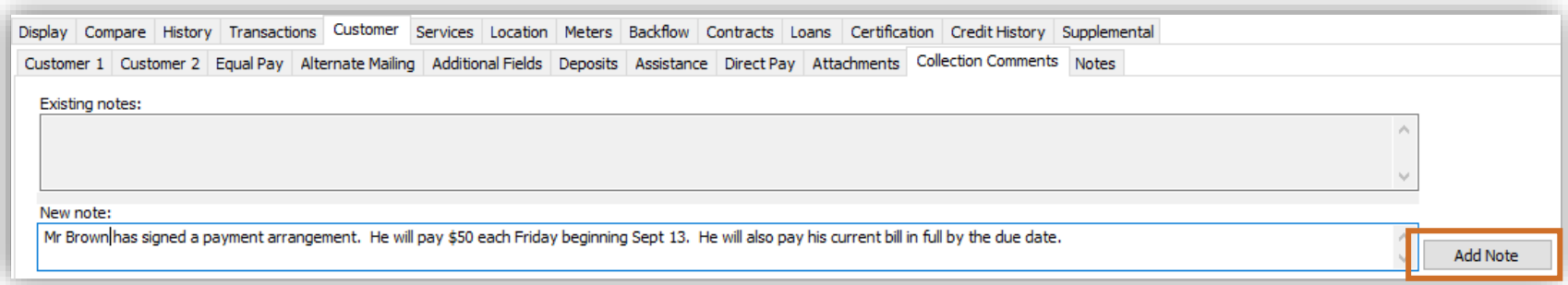
Customer

Attachments – any files can be attached to the customers accounts, applications, budget letters, utility bills, notices or pictures. Note: when using attachments make sure they are saved in a place on the server that will not change. Example Clarity\Attachments. The attachments are links like Microsoft shortcuts that can be broken if the files are moved.

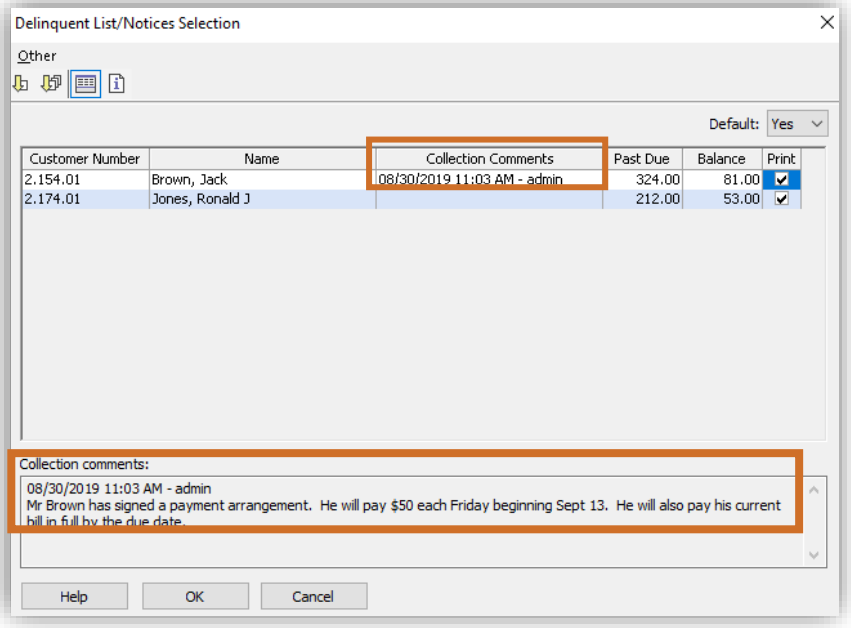


Customer

Collection Comments is one of two places data can be entered in Customer Inquiry. Any notes regarding the collection of the account should be entered here. Type in the comment and click Add Note. This will date and timestamp the note.

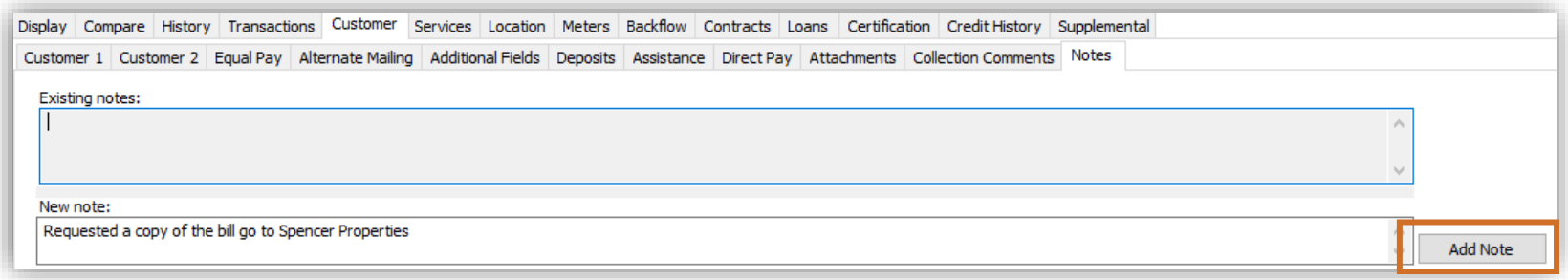


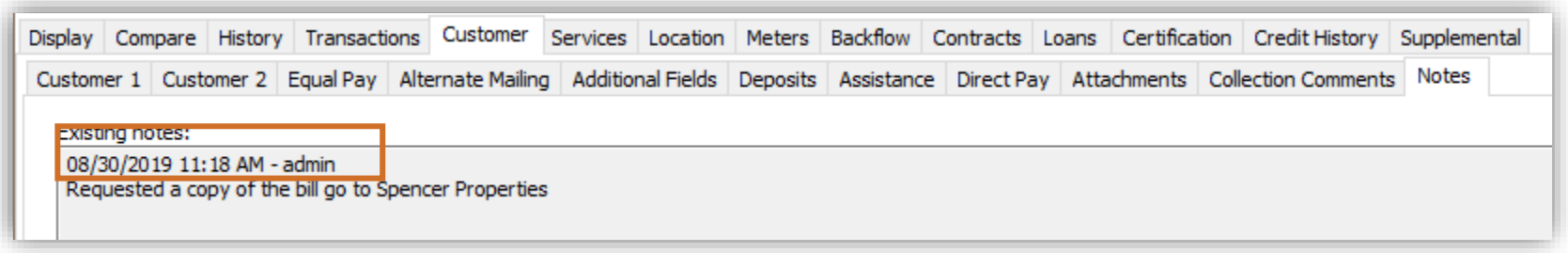
Notes entered in Collection Comments are available when selecting customers for Delinquent or Shutoff Notices.



Customer

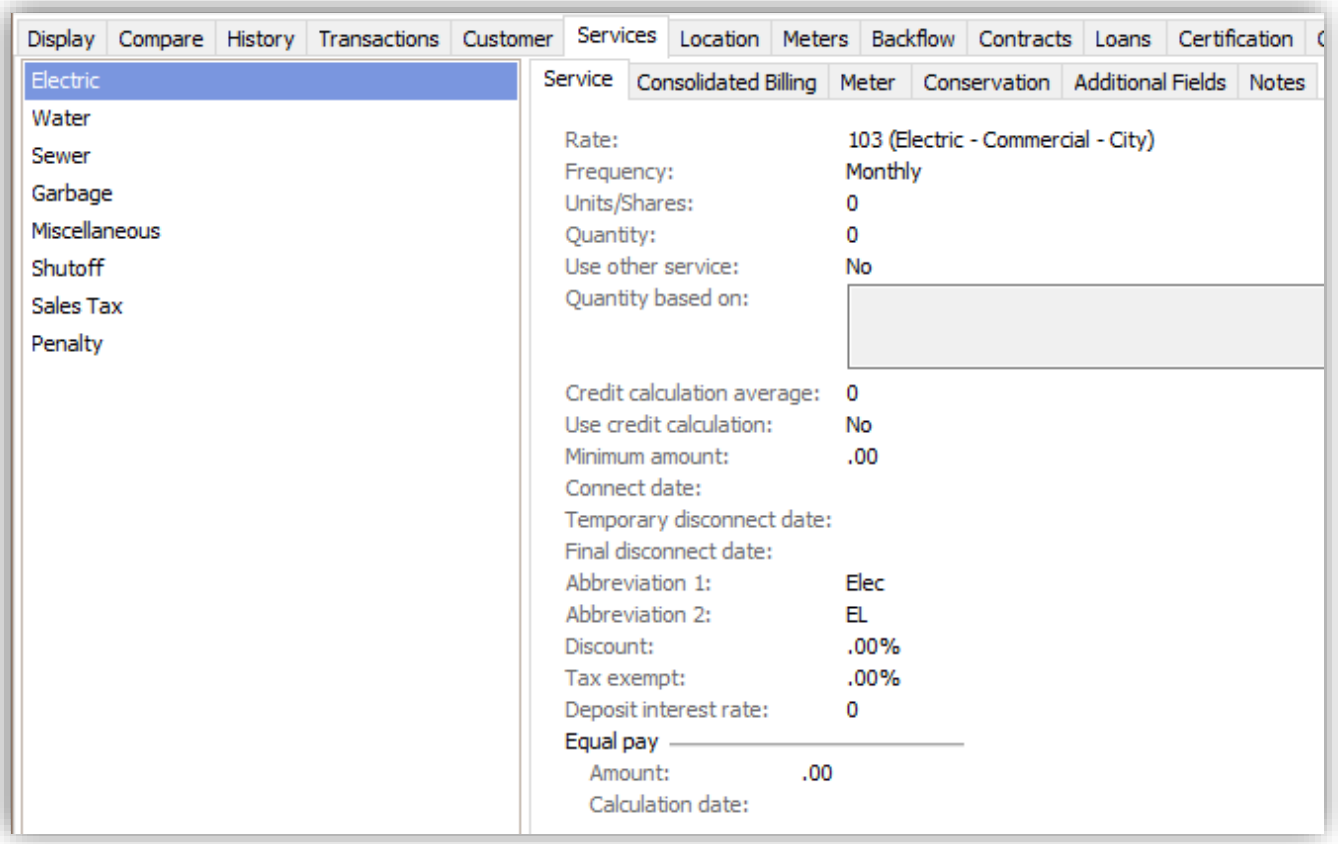
Notes is the other place data can be entered in Customer Inquiry.
Any notes about the account other than those regarding the collection of the account should be entered here. Type in the comment and click Add Note. This will date and timestamp the note.





Services

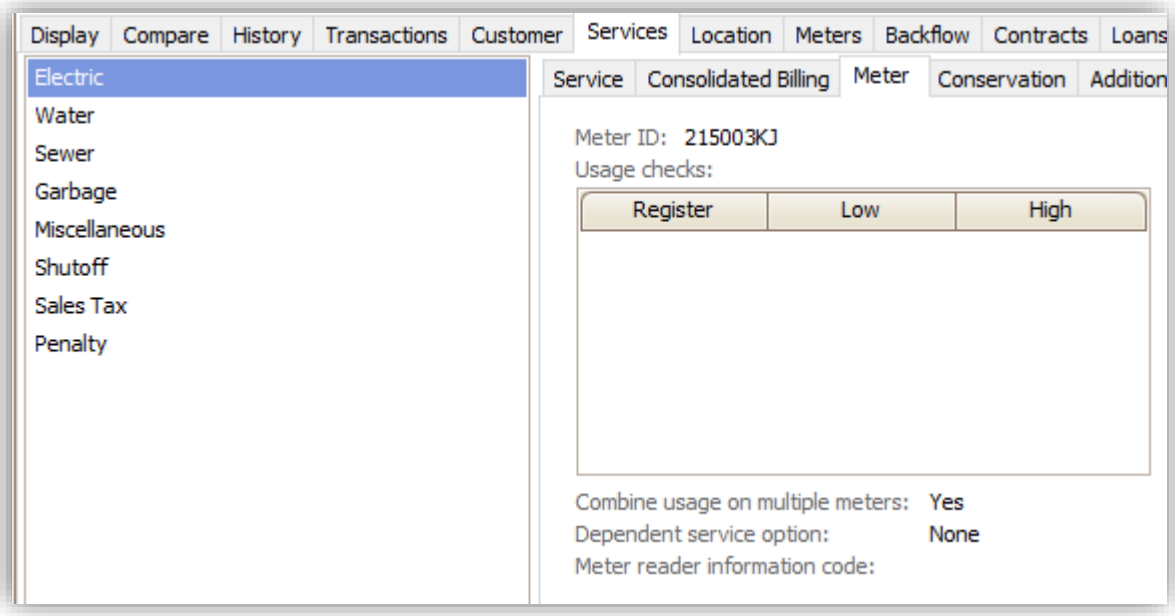
Services is the billing control screen. This shows all the services being billed along with the rate, frequency and connect/disconnect dates. This is where Equal Pay amounts and Tax-Exempt percentages are stored.



Note: If a service is no longer being billed for an account and it should not be billed on subsequent customers, make sure to put in a Final Disconnect Date. If the Temporary disconnect date is used instead, the service will bill on the next customer.

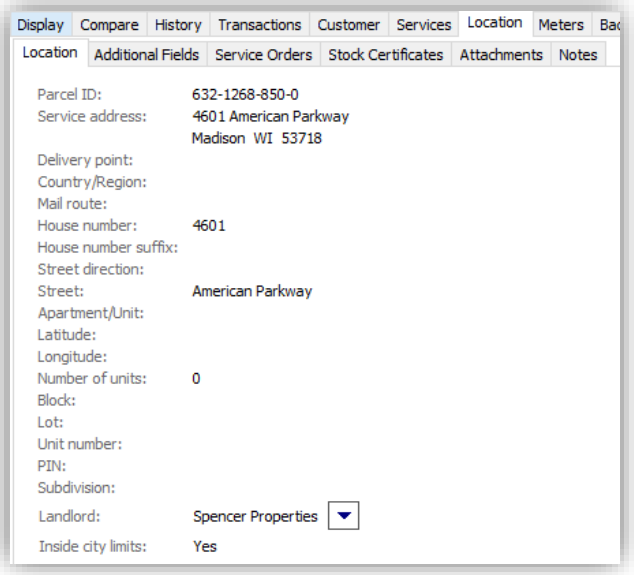
Services

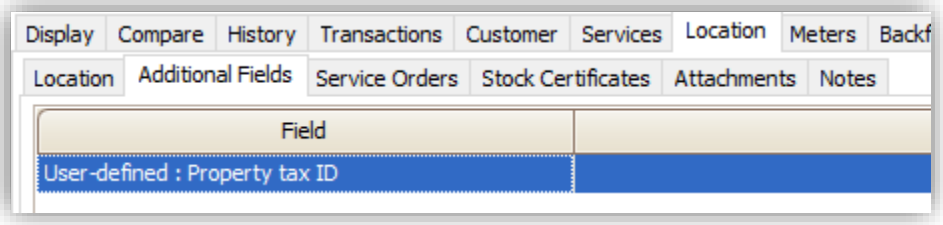
For metered Services, the associated meter number will display on the Meter tab. If there are multiple meters on an account that need to have the usage combined for billing, that flag is set here.
Deduct meters are also defined in the Dependent Service Option.



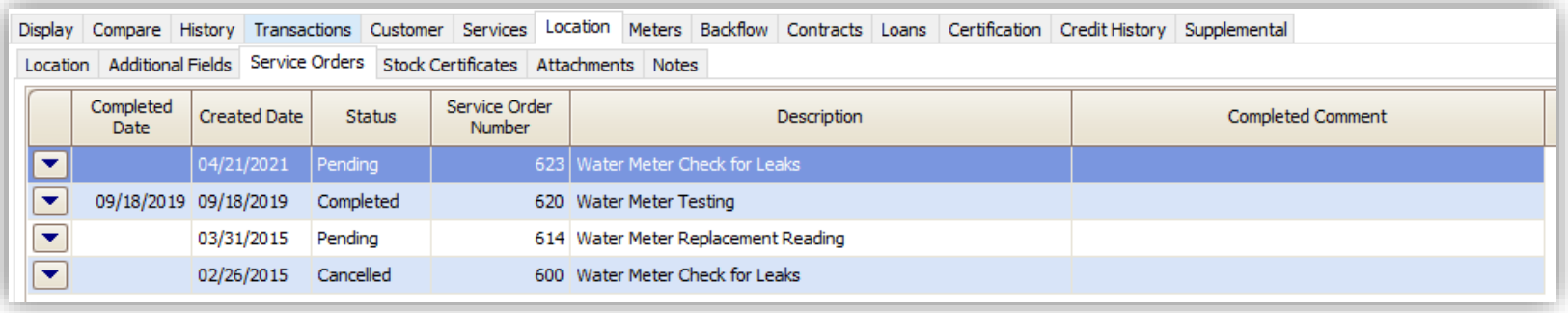
Location

The Location screen gives basic information about the location including service address, parcel id, location user defined fields and attachments.





All service order history about a location is available on the location screen.

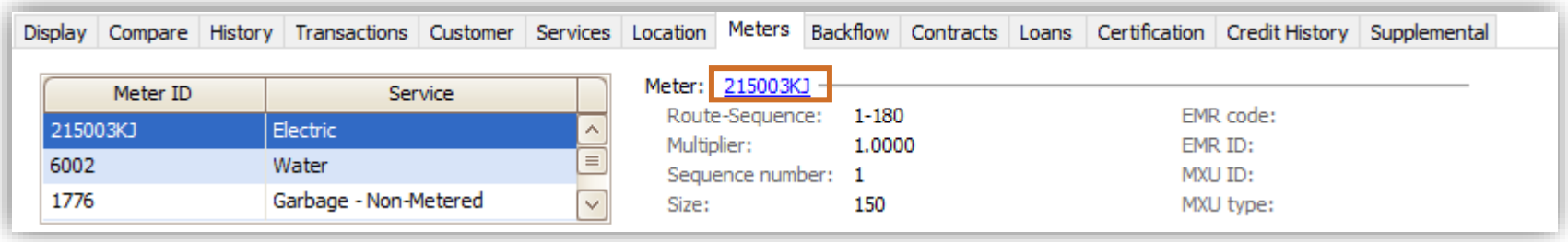


Meters

The Meters screen lists all of the meters associated with a location.

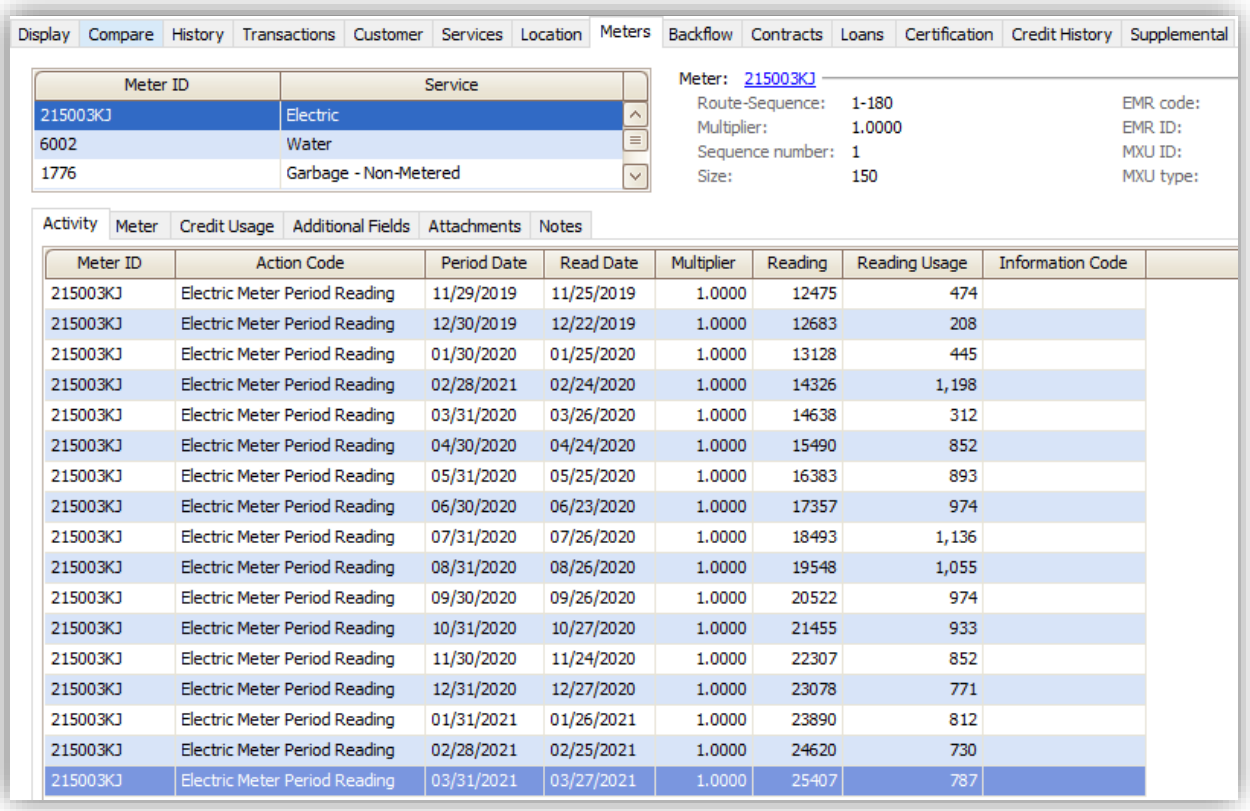
The top part of this screen shows basic information about the highlighted meter: route/sequence, multiplier, size and communication numbers.

The hyperlink meter number (in blue) will take you directly to that meter in Modify Existing Meters if changes to the meter information need to be made.



Meters

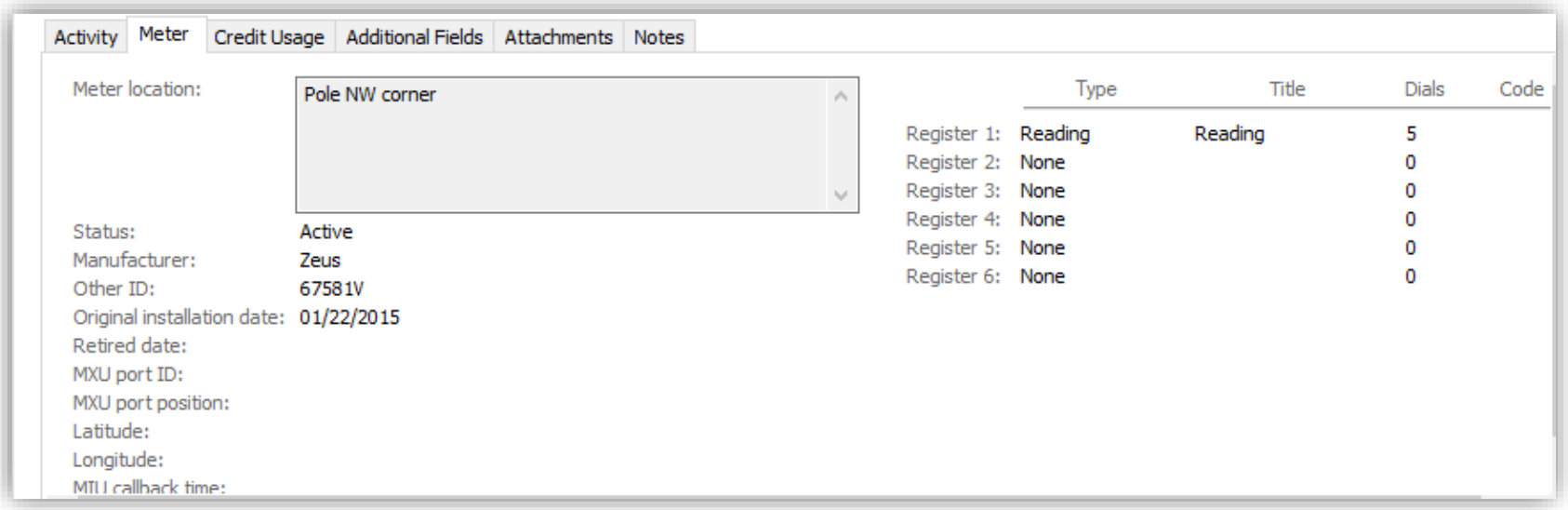
The Activity tab shows the reading history, including period meter readings, meter installs, removals, new connect reads and when using service orders any reading associated with Action codes that have been flagged to be included in Meter Activity.



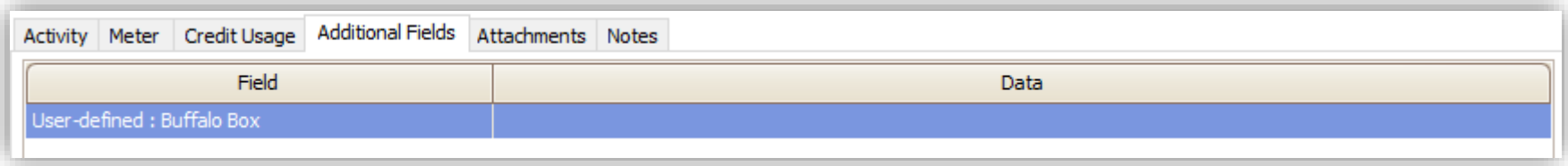
Meter ID	Action Code	Period Date	Read Date	Multiplier	Reading	Reading Usage	Information Code
215003KJ	Electric Meter Period Reading	11/29/2019	11/25/2019	1.0000	12475	474	
215003KJ	Electric Meter Period Reading	12/30/2019	12/22/2019	1.0000	12683	208	
215003KJ	Electric Meter Period Reading	01/30/2020	01/25/2020	1.0000	13128	445	
215003KJ	Electric Meter Period Reading	02/28/2021	02/24/2020	1.0000	14326	1,198	
215003KJ	Electric Meter Period Reading	03/31/2020	03/26/2020	1.0000	14638	312	
215003KJ	Electric Meter Period Reading	04/30/2020	04/24/2020	1.0000	15490	852	
215003KJ	Electric Meter Period Reading	05/31/2020	05/25/2020	1.0000	16383	893	
215003KJ	Electric Meter Period Reading	06/30/2020	06/23/2020	1.0000	17357	974	
215003KJ	Electric Meter Period Reading	07/31/2020	07/26/2020	1.0000	18493	1,136	
215003KJ	Electric Meter Period Reading	08/31/2020	08/26/2020	1.0000	19548	1,055	
215003KJ	Electric Meter Period Reading	09/30/2020	09/26/2020	1.0000	20522	974	
215003KJ	Electric Meter Period Reading	10/31/2020	10/27/2020	1.0000	21455	933	
215003KJ	Electric Meter Period Reading	11/30/2020	11/24/2020	1.0000	22307	852	
215003KJ	Electric Meter Period Reading	12/31/2020	12/27/2020	1.0000	23078	771	
215003KJ	Electric Meter Period Reading	01/31/2021	01/26/2021	1.0000	23890	812	
215003KJ	Electric Meter Period Reading	02/28/2021	02/25/2021	1.0000	24620	730	
215003KJ	Electric Meter Period Reading	03/31/2021	03/27/2021	1.0000	25407	787	

Meters

The Meter tab shows all information associated with the meter



User Defined Fields, Attachments and Notes associated with the meter are also displayed in Meters.



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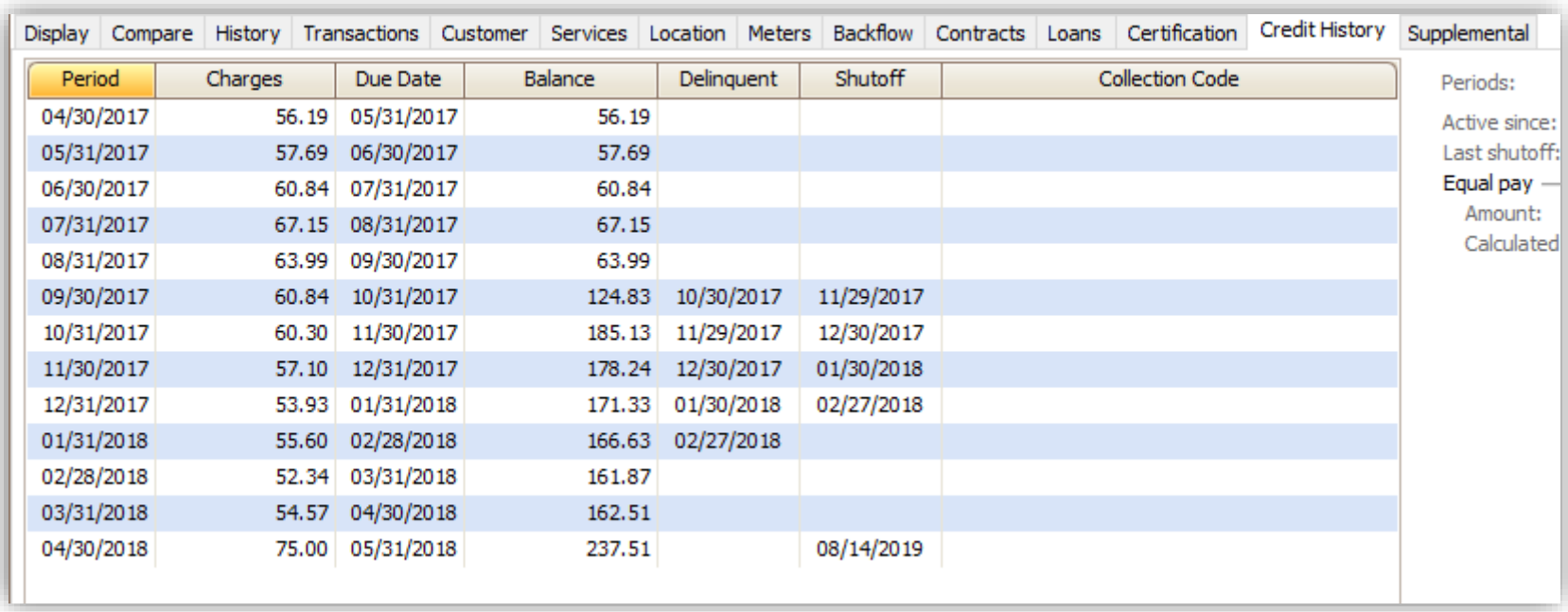
Credit History

Credit History will show when Delinquent and Shutoff notices were sent to a customer. These dates are populated when Delinquent or Shutoff Notices are processed with the Update Credit Rating flag checked. If more than one notice was sent for a particular period, the word multiple will display. If you hover over it, it will list the notices that were sent. For example, Delinquent Notice & Cosigner Delinquent Notice. Automatically Apply Deposits/Interest can now use Credit History to determine if the customer is eligible for a refund.

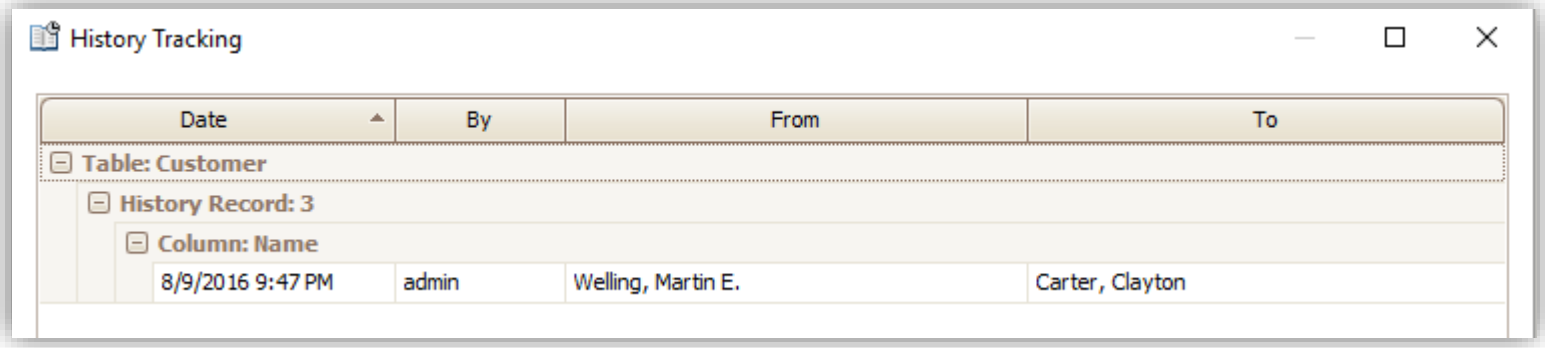


Period	Charges	Due Date	Balance	Delinquent	Shutoff	Collection Code
04/30/2017	56.19	05/31/2017	56.19			
05/31/2017	57.69	06/30/2017	57.69			
06/30/2017	60.84	07/31/2017	60.84			
07/31/2017	67.15	08/31/2017	67.15			
08/31/2017	63.99	09/30/2017	63.99			
09/30/2017	60.84	10/31/2017	124.83	10/30/2017	11/29/2017	
10/31/2017	60.30	11/30/2017	185.13	11/29/2017	12/30/2017	
11/30/2017	57.10	12/31/2017	178.24	12/30/2017	01/30/2018	
12/31/2017	53.93	01/31/2018	171.33	01/30/2018	02/27/2018	
01/31/2018	55.60	02/28/2018	166.63	02/27/2018		
02/28/2018	52.34	03/31/2018	161.87			
03/31/2018	54.57	04/30/2018	162.51			
04/30/2018	75.00	05/31/2018	237.51		08/14/2019	

Icon Ribbon

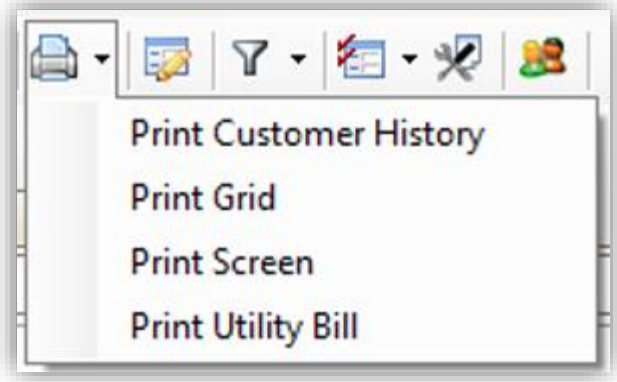
In addition to all the information available in the tabs of Customer Inquiry, there are also links to additional information or processes from the icon ribbon.

History Tracking will display any changes made to fields that have tracking turned on.



Icon Ribbon

Print has several different options available.



Print Customer History can link to your favorite Customer History report usually a 12-month history

Print Utility Bill can link to the Utility Bill reprint report.

Print Grid can be used to print any Customer Inquiry screen that looks like a grid or a chart. Those screens include Display, Compare, History, Transaction, Service Order History, Meter Activity and Credit History,

Anycity Corporation — Customer Inquiry - Meter Activity — 9/15/2021 Page: 1
2.147.01, Clayton Carter, 791 Palisades Dr

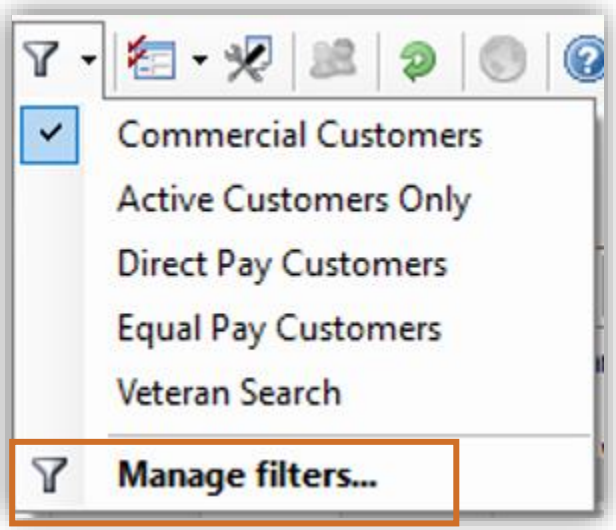
Meter ID	Action Code	Period Date	Read Date	Multiplier	Reading	Reading Usage	Information Code
511148KW	Electric Meter Period Reading	04/29/2019	04/23/2019	1.0000	25584	490	
511148KW	Electric Meter Period Reading	05/30/2019	05/22/2019	1.0000	26105	521	
511148KW	Electric Meter Period Reading	06/29/2019	06/22/2019	1.0000	26745	640	
511148KW	Electric Meter Period Reading	07/30/2019	07/23/2019	1.0000	27410	665	
511148KW	Electric Meter Period Reading	08/30/2019	08/24/2019	1.0000	28103	693	

Icon Ribbon

Links to Modify Existing Customer for the customer displaying in inquiry.

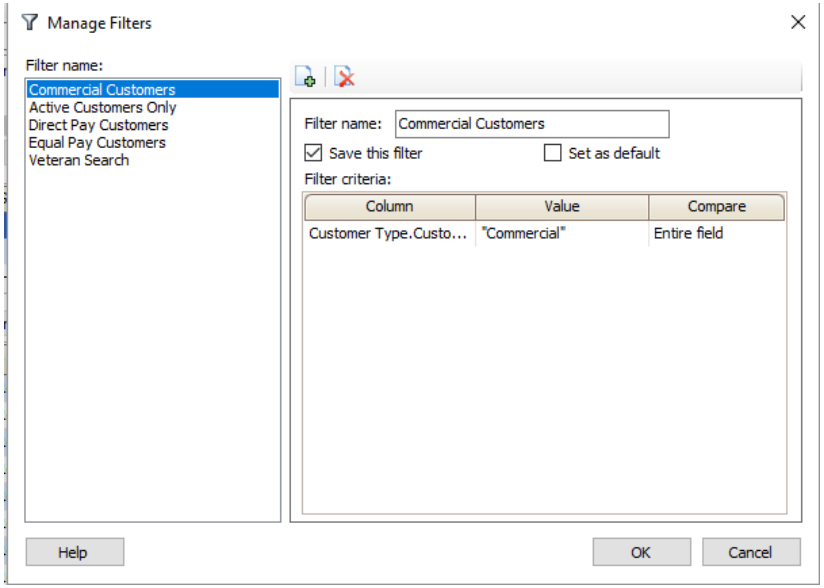
Filters can be created to bring up only customers that meet the criteria entered in the filter. Multiple filters can be created and stored. The most popular filter is Active Customers.

To create a filter, click on Manage filters

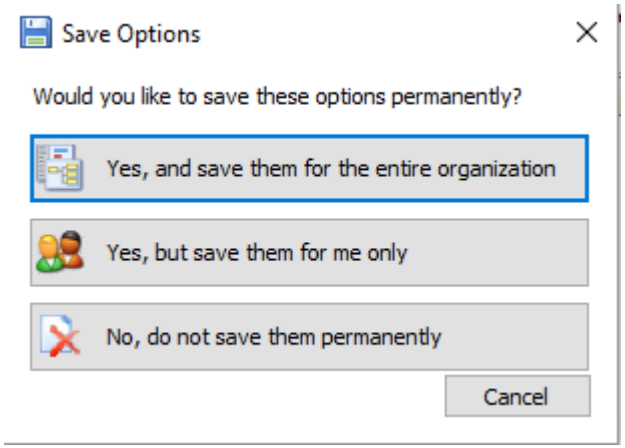


Icon Ribbon

1. Click Add
2. Enter the name of the filter
3. Enter the criteria for the accounts needed
4. Click OK



5. When the Save Options come up Click Yes and save for the entire organization.



Icon Ribbon

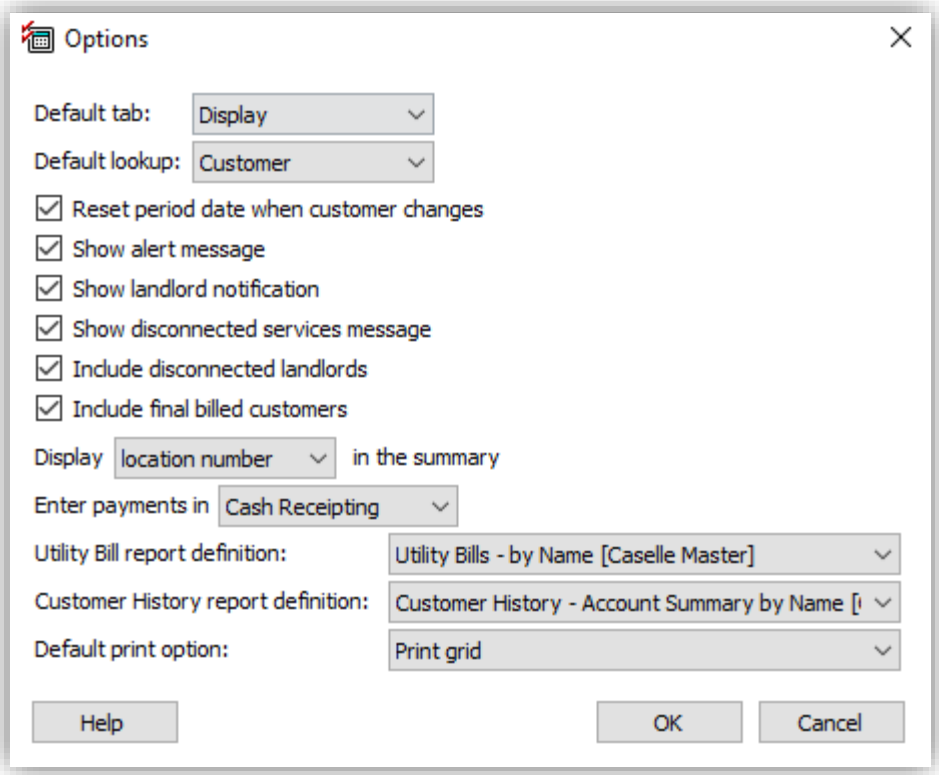
Options allows some customization in Customer Inquiry.

Typical option changes:

- Default tab that opens when first going into Customer Inquiry.
- Default lookup if you use location instead of Customer

New Options in Connect

- Show Disconnected Services message
- Display Location number or city in the summary
- Enter Payments links to Cash Receipting or UM Enter Payments.



Icon Ribbon

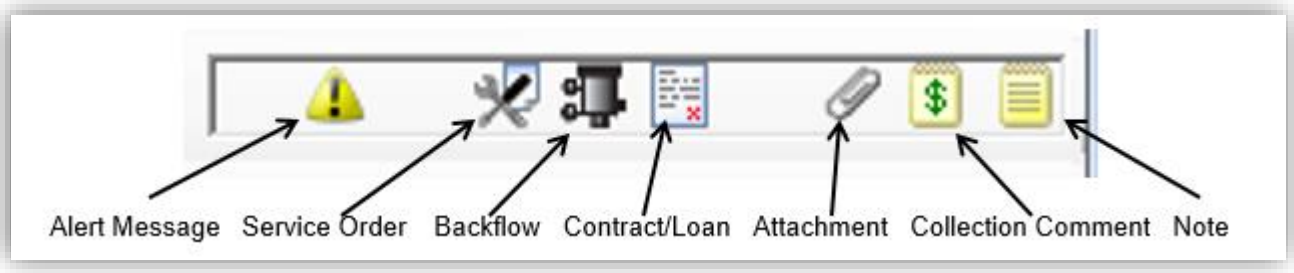
Links to Create Service Orders for the customer displaying in inquiry.

Refreshes the information in Customer Inquiry. If the customer inquiry tab has been open and new customers have been setup or existing customers have been modified, clicking on this will show all the new information.

Links to the online help screens.

Is “What’s this Help.” When it is turned on, it will explain what a data entry field is when the mouse hovers over it.

Status Tray



The Status Tray in the upper right corner gives some quick information about the customer being displayed. Any of these icons will link to the information stored on the account. The user can see at a glance if the customer has information in the following areas:

- Alert Message
- Service Orders – if a green check mark is on the icon, the orders are completed
- Backflow Device tracking
- Contract or Loan
- Attachments
- Collection Comments
- Notes
- If Landlords are used a house will be displayed, if it has green checkmark, it is the landlord account.

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QUESTIONS?