

Customer Inquiry

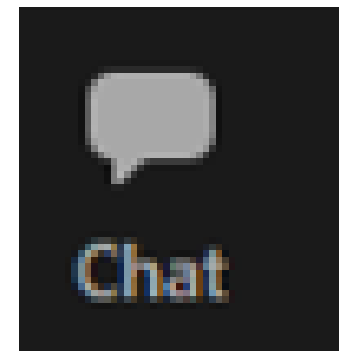
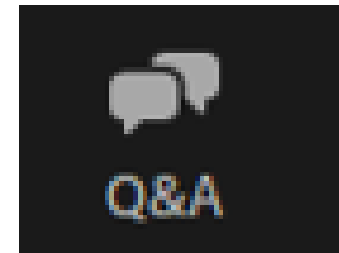
Friday: 8:30 – 9:30

Presenter: **Therese Powers**

Monitor: **Mark Meyer**

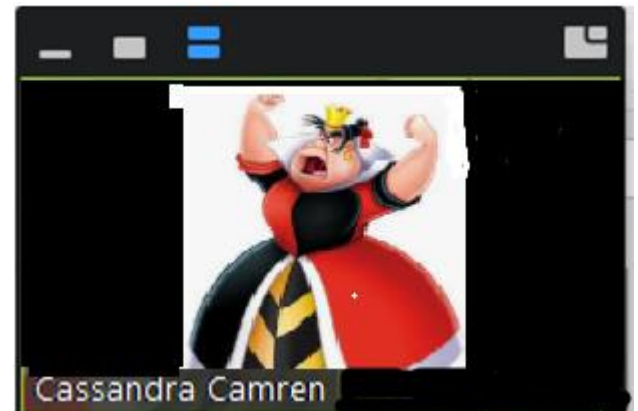
Communicating

- 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.



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.



Housekeeping

Door Prize Winner

Nancy Kolberg
Shorewood Hills

Documents:

<https://www.civicsystems.com/documents>

Customer Inquiry

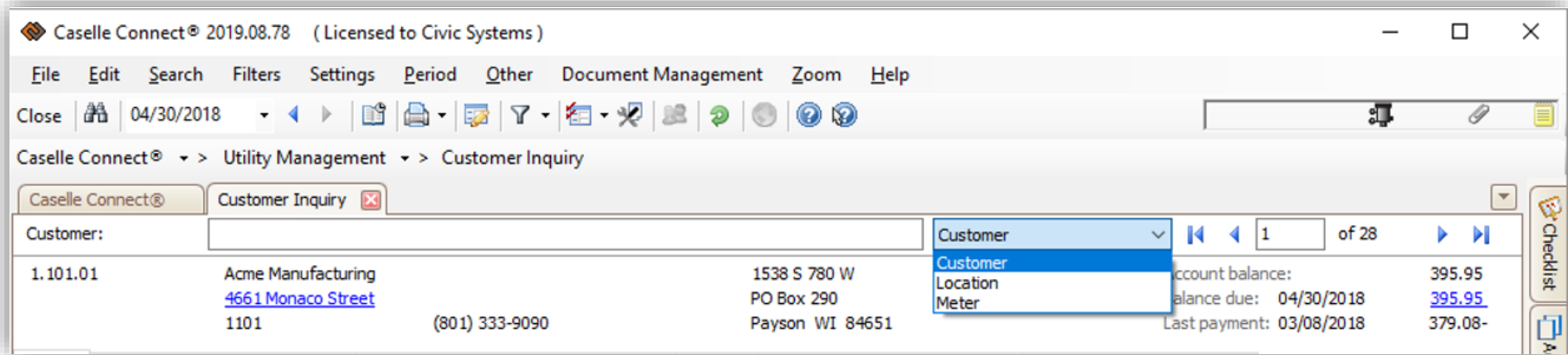
Presenter: Therese Powers
Monitor: Mark Meyer

Friday: 8:30 – 9:30

- Finding Accounts
 - Quick Search
 - Advance Search
- Customer Summary
 - Related Accounts
- Tabs
 - Display
 - Compare
 - History
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 - Customer
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- Status Tray

CUSTOMER INQUIRY

Finding an Account



Caselle Connect® 2019.08.78 (Licensed to Civic Systems)

File Edit Search Filters Settings Period Other Document Management Zoom Help

Close 04/30/2018

Caselle Connect® > Utility Management > Customer Inquiry

Caselle Connect® Customer Inquiry

Customer: 1.101.01

Acme Manufacturing
[4661 Monaco Street](#)
 1101 (801) 333-9090

1538 S 780 W
 PO Box 290
 Payson WI 84651

Customer
 Customer
 Location
 Meter

1 of 28

Account balance: 395.95
 Balance due: 04/30/2018 [395.95](#)
 Last payment: 03/08/2018 379.08-


Checklist

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


Advanced Search (F9)

Different based on the quick search option selected.

 Search


Enter a search phrase or select from the list.

Name	Customer Number	Service Address	Final Bill Date	Street
Acme Manufacturing	110101	4661 Monaco Street		Monaco Street
Norma's Hair Salon	110201	10 Terrace Court		Terrace Court
Joe's Drive-In	110301	4601 American Parkway		American Parkway
Smith, Dr. Ronald T.				
Jones, Dr. Harvey D.				
Simpson Reception Center				
Crystal's Restaurant				

 Search

Enter a search phrase or select from the list.

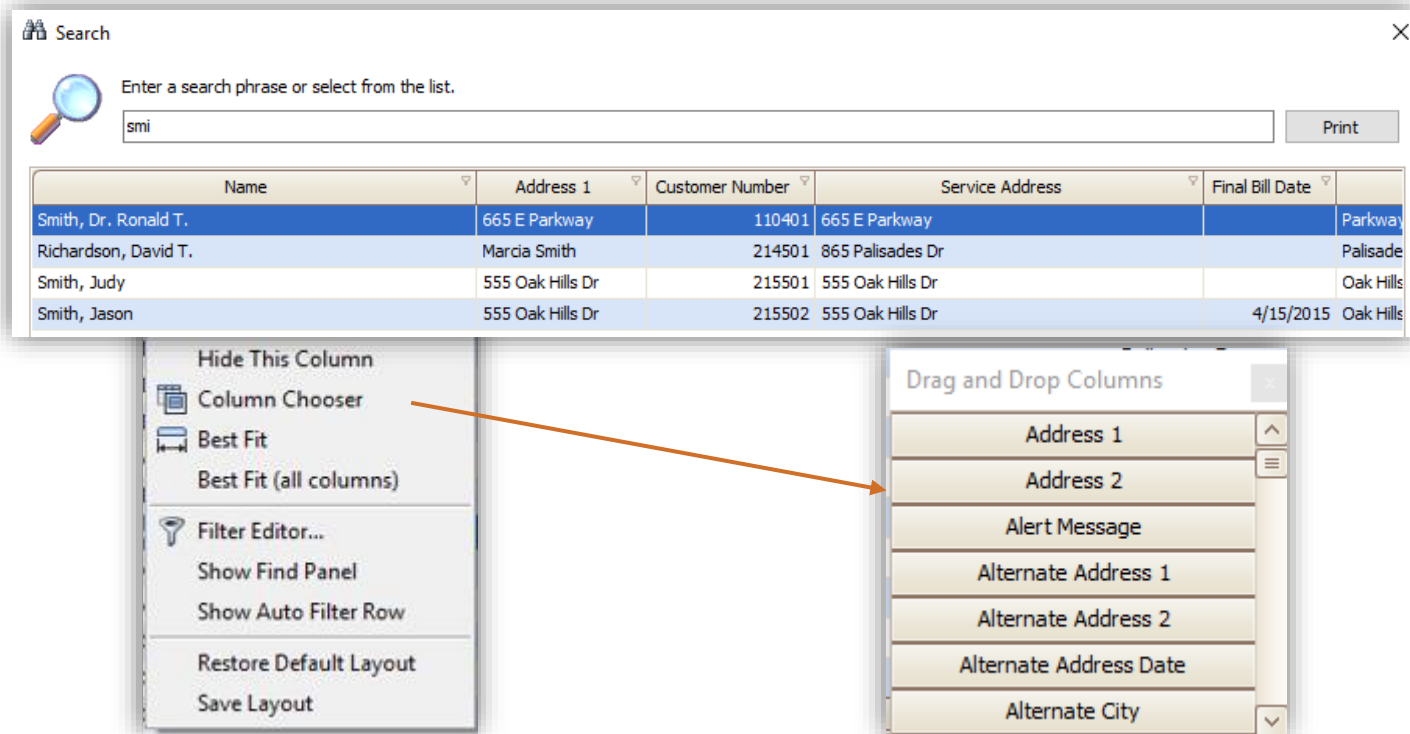
Service Address	Location Number	Customer Number	Street	Parcel ID
10 Terrace Court	1102	110201	Terrace Court	632-1268-740-0
1228 Woodbridge Trl	1108	110801	Woodbridge Trl	623-1501-575-0
1501 Village Road	3102	310201	Village Road	
1502 Village Road	3103	310301	Village Road	
1503 Village Road				
1550 Village Road				

 Search

Enter a search phrase or select from the list.

Meter ID	Service	Service Address	Customer ...	Name	Locati...	EMR ID	MXU ID
30015688	Water	540 Oak Hills Dr	215401	Brown, Jack	2154	123456	
6002	Water	4601 American Parkway	110301	Joe's Drive-In	1103		
5887	Garbage	791 Palisades Dr	214702	Welling, Martin E.	2147		
5887	Garbage	791 Palisades Dr	214701	Carter, Clayton	2147		
579843KS	Electric	540 Oak Hills Dr	215401	Brown, Jack	2154		
5739	Garbage	555 Oak Hills Dr	215501	Smith, Judy	2155		

- 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.



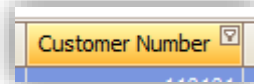
The screenshot shows a 'Search' window with a search bar containing 'smi' and a 'Print' button. Below the search bar is a table with the following data:

Name	Address 1	Customer Number	Service Address	Final Bill Date	
Smith, Dr. Ronald T.	665 E Parkway	110401	665 E Parkway		Parkway
Richardson, David T.	Marcia Smith	214501	865 Palisades Dr		Palisade
Smith, Judy	555 Oak Hills Dr	215501	555 Oak Hills Dr		Oak Hills
Smith, Jason	555 Oak Hills Dr	215502	555 Oak Hills Dr	4/15/2015	Oak Hills

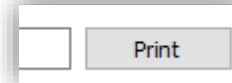
A right-click context menu is open over the table header, showing options: 'Hide This Column', 'Column Chooser', 'Best Fit', 'Best Fit (all columns)', 'Filter Editor...', 'Show Find Panel', 'Show Auto Filter Row', 'Restore Default Layout', and 'Save Layout'. An orange arrow points from 'Column Chooser' to a 'Drag and Drop Columns' panel on the right, which lists available columns: 'Address 1', 'Address 2', 'Alert Message', 'Alternate Address 1', 'Alternate Address 2', 'Alternate Address Date', and 'Alternate City'.

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.



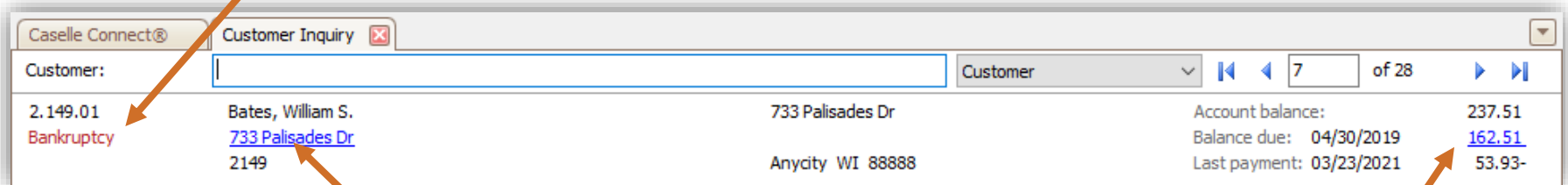
Once the search criteria gives the results needed, the results can be printed by clicking the Print button next to the search field.



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.



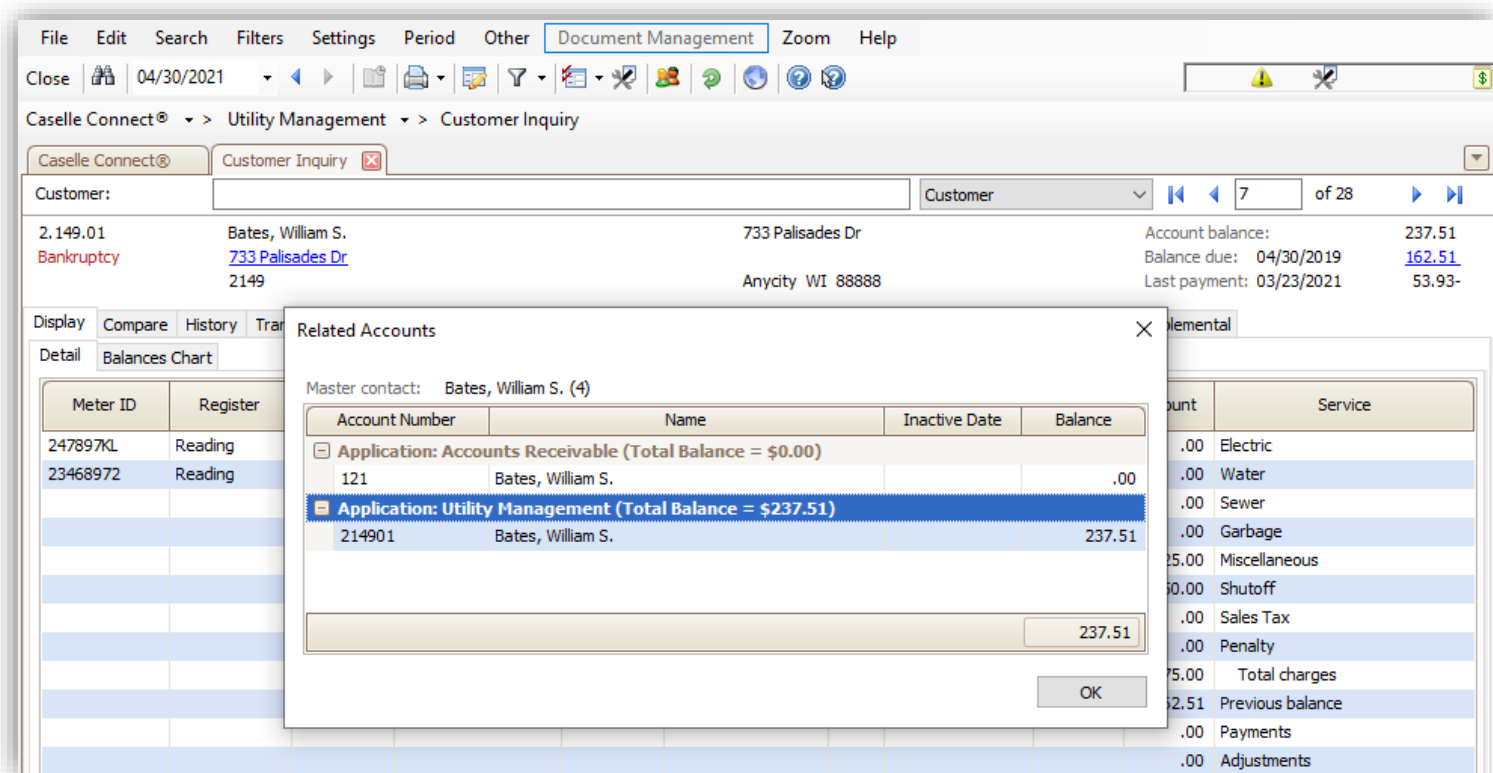
Customer Inquiry		Customer		7 of 28	
2.149.01 Bankruptcy	Bates, William S. 733 Palisades Dr 2149	733 Palisades Dr Anycity WI 88888	Account balance:	237.51	
			Balance due: 04/30/2019	162.51	
			Last payment: 03/23/2021	53.93-	

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.

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



The screenshot shows the 'Caselle Connect' software interface. The main window displays a 'Customer Inquiry' for 'Bates, William S.' at '733 Palisades Dr, Anycity WI 88888'. The account balance is \$237.51. A 'Related Accounts' dialog box is open, showing a list of accounts for the master contact 'Bates, William S. (4)'. The dialog box has columns for 'Account Number', 'Name', 'Inactive Date', and 'Balance'.

Account Number	Name	Inactive Date	Balance
Application: Accounts Receivable (Total Balance = \$0.00)			
121	Bates, William S.		.00
Application: Utility Management (Total Balance = \$237.51)			
214901	Bates, William S.		237.51
			237.51

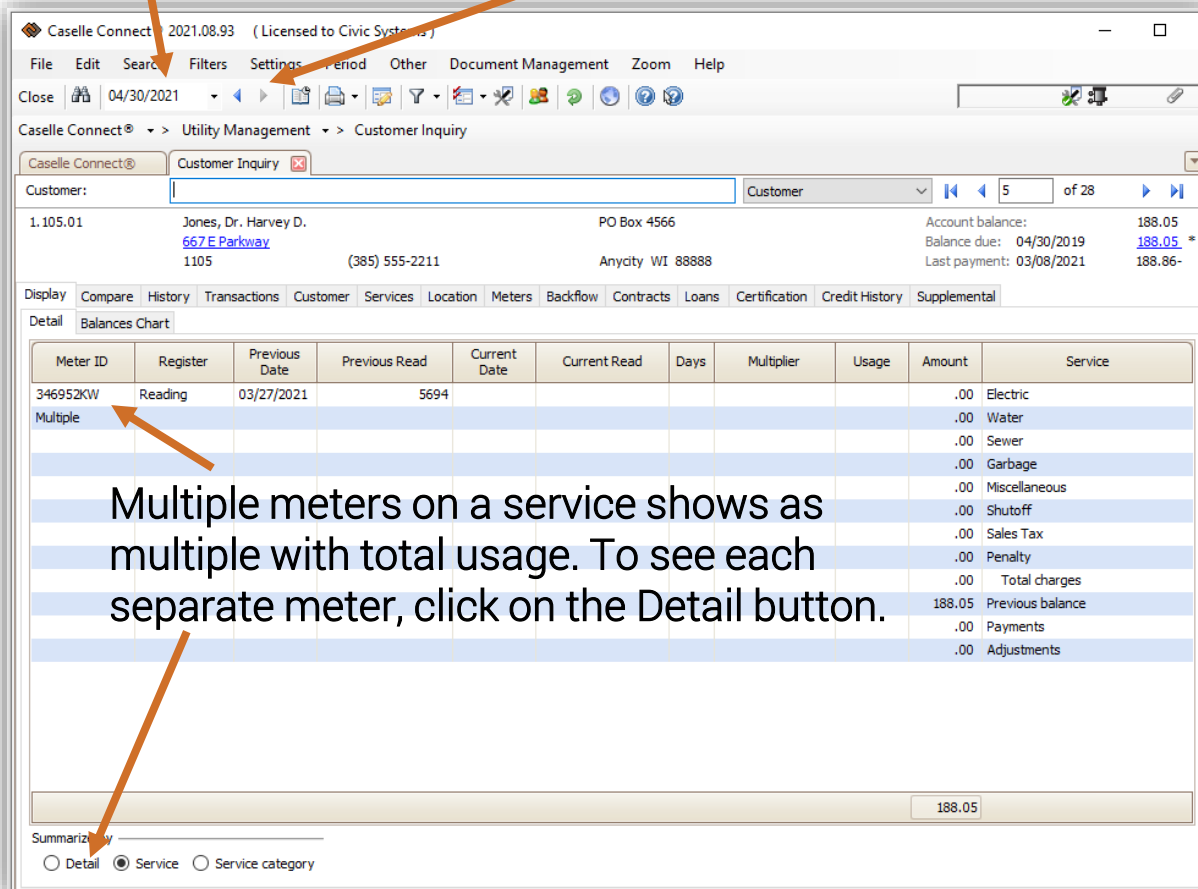
The dialog box also includes an 'OK' button. In the background, a table of services is visible:

Amount	Service
.00	Electric
.00	Water
.00	Sewer
.00	Garbage
25.00	Miscellaneous
50.00	Shutoff
.00	Sales Tax
.00	Penalty
75.00	Total charges
2.51	Previous balance
.00	Payments
.00	Adjustments

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.



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

Customer Inquiry

Customer: [Search Box] Customer 5 of 28

1.105.01 Jones, Dr. Harvey D. PO Box 4566 Account balance: 188.05
 667 E Parkway Balance due: 04/30/2019 188.05 *
 1105 (385) 555-2211 Anycity WI 88888 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
Multiple									.00	Water
									.00	Sewer
									.00	Garbage
									.00	Miscellaneous
									.00	Shutoff
									.00	Sales Tax
									.00	Penalty
									.00	Total charges
									188.05	Previous balance
									.00	Payments
									.00	Adjustments

Summary 188.05

Detail Service Service category

Multiple meters on a service shows as multiple with total usage. To see each separate meter, click on the Detail button.

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: [Field] Customer 5 of 28

1.105.01 Jones, Dr. Harvey D. PO Box 4566 Account balance: 188.05
 667 E Parkway Balance due: 04/30/2019 188.05 *
 1105 (385) 555-2211 Any city WI 88888 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

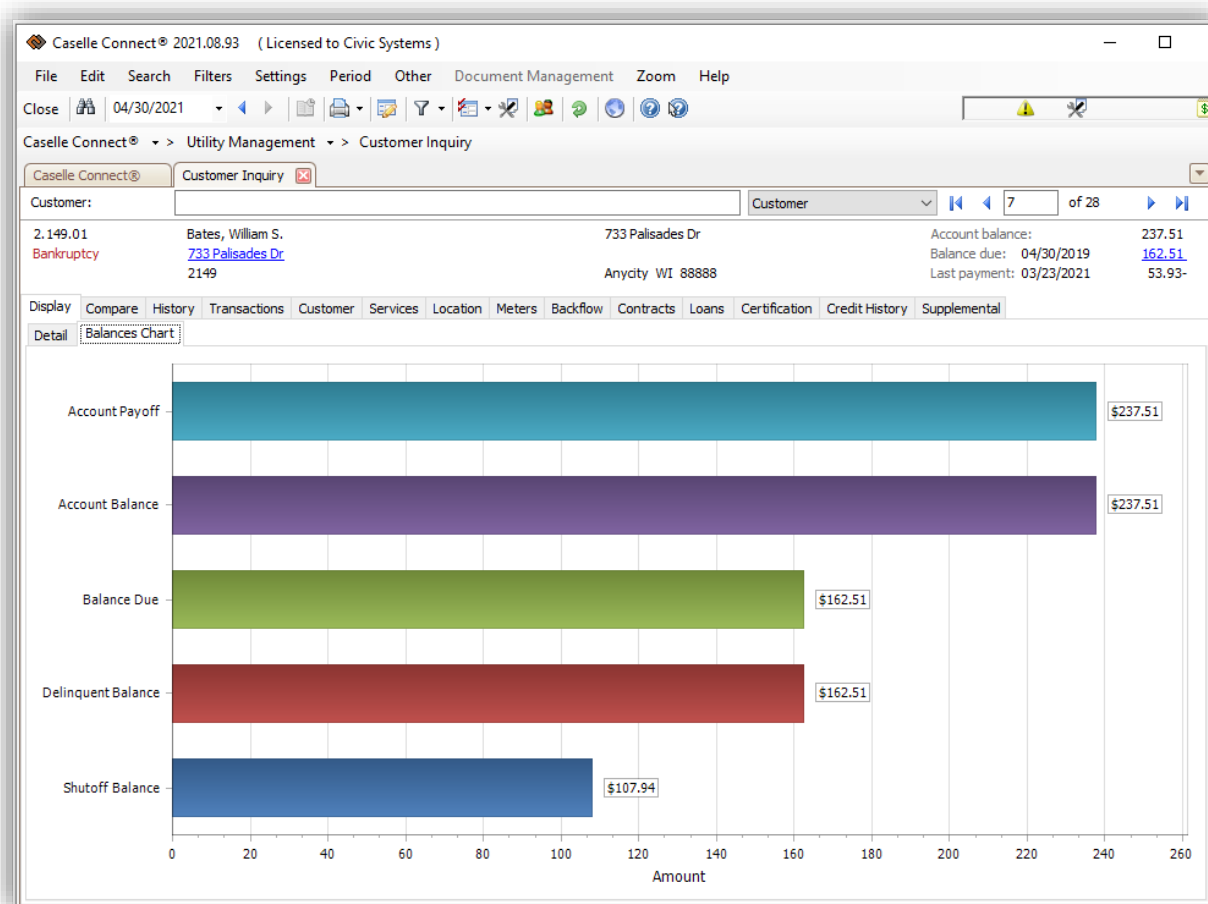
Summarize by: ☒ Detail ☐ Service ☐ Service category

188.05

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.

Display	Compare	History	Transactions	Customer	Services	Location	Meters	Backflow	Contracts	Loans	Certification	Credit History	Supplemental
Detail	Billed Usage Chart	Billed Amount Chart	Billing Chart										
	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

Display ☐ Amounts
☒ Usages
☐ Payment detail
☐ Adjustment detail
 Summarize by ☐ Detail
☒ Service
☐ Service category

Can show Amounts Only, Usages Only or both by checking the display box.

Compare

Display	Compare	History	Transactions	Customer	Services	Location	Meters	Backflow	Contracts	Loans	Certification	Credit History	Supplemental
Detail	Billed Usage Chart	Billed Amount Chart	Billing Chart										
	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.

Display	Compare	History	Transactions	Customer	Services	Location	Meters	Backflow	Contracts	Loans	Certification	Credit History	Supplemental
Detail	Billed Usage Chart	Billed Amount Chart	Billing Chart										
	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

Display
☒ Amounts
☒ Usages
☐ Payment detail
☐ Adjustment detail
 Summarize by
☒ Detail
☐ Service
☐ Service category

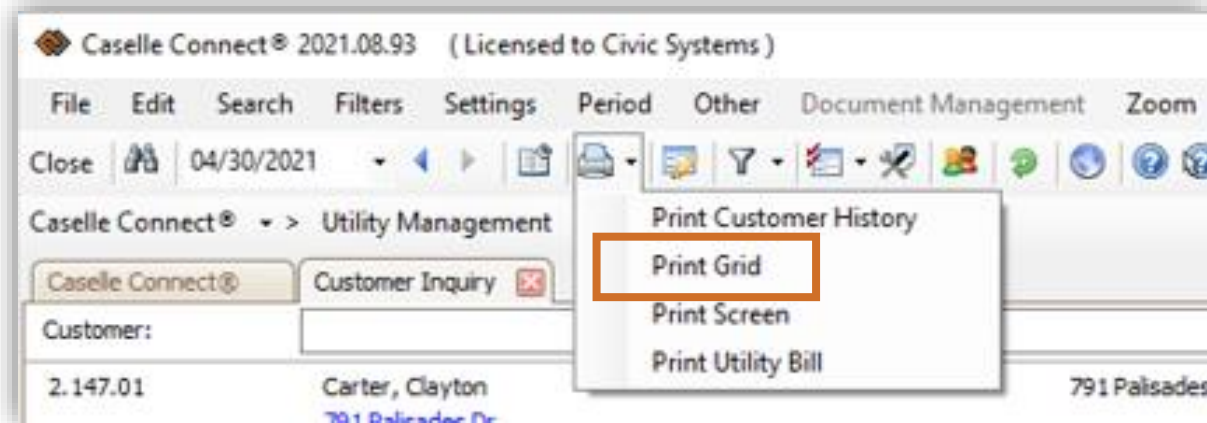
Service category totals by service category

Display	Compare	History	Transactions	Customer	Services	Location	Meters	Backflow	Contracts	Loans	Certification	Credit History	Supplemental
Detail	Billed Usage Chart	Billed Amount Chart	Billing Chart										
	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

Display
☒ Amounts
☒ Usages
☐ Payment detail
☐ Adjustment detail
 Summarize by
☐ Detail
☐ Service
☒ Service category

Compare

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



Anycity Corporation

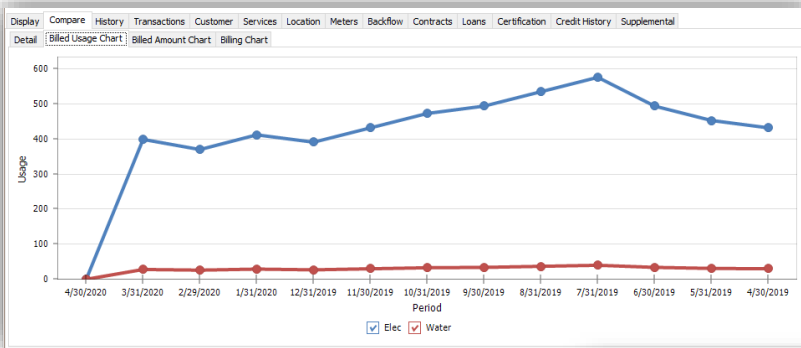
Customer Inquiry - Compare
2.147.01, Clayton Carter, 791 Palisades Dr

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

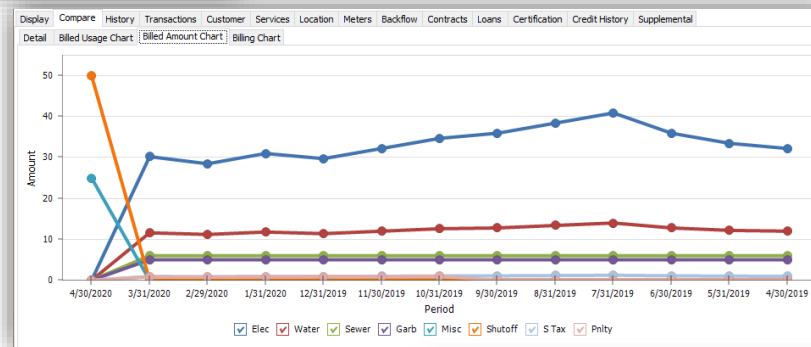
Compare Charts

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

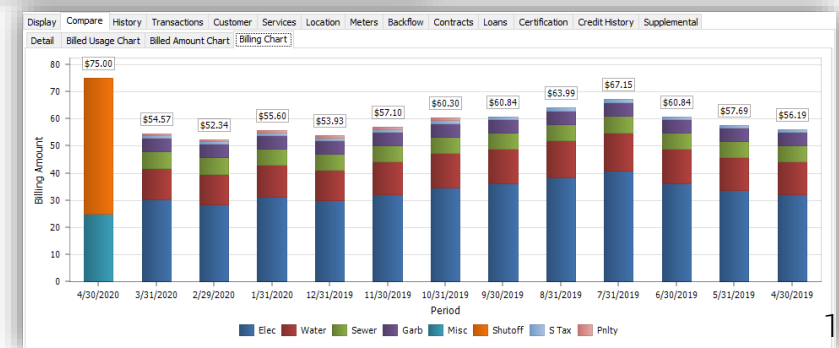


The Billing Usage Chart graphs the usage for the metered services. The services to display can be selected at the bottom.

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.

Display Compare History Transactions Customer Services Location Meters Backflow Contracts Loans Certification Credit History Supplemental

Detail Balance by Service Chart

Date	Description	Amount	Balance	Service	Amount
07/31/2020	Payments	77.30-	.00	Electric	63.31
07/31/2020	Billings	86.31	86.31	Water	32.21
08/31/2020	Payments	86.31-	.00	Sewer	20.60
08/31/2020	Billings	81.67	81.67	Garbage	12.49
09/30/2020	Payments	81.67-	.00	Miscellaneous	.00
09/30/2020	Billings	77.30	77.30	Shutoff	.00
10/31/2020	Payments	.00	77.30	Sales Tax	3.27
10/31/2020	Billings	74.99	152.29	Penalty	3.06
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		
					134.94

Billings & Payments by period

A/R by Service

Aged Receivables

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

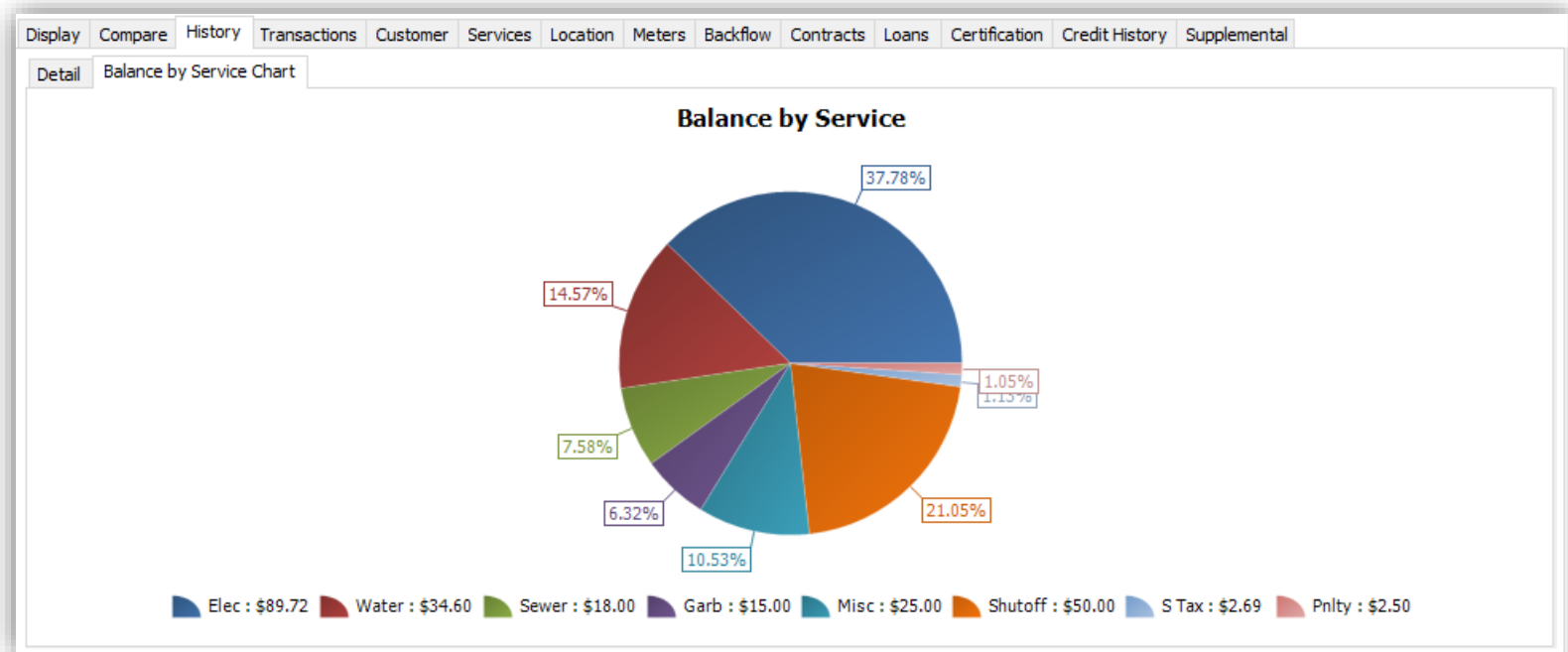
Billings & Payments by period

A/R by Service

Aged Receivables

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.



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

Display	Compare	History	Transactions	Customer	Services	Location	Meters	Backflow	Contracts	Loans	Certification	Credit History	Supplemental
		Date	Type	Reference Number	Service	Quantity Billed	Description	Amount					
		12/31/2020	Billing	49	Garb	0	Automatic Billing	6.00					
		12/31/2020	Billing	49	S Tax	0	Automatic Billing	5.16					
		01/13/2021	Pmt	29	*	0	Utility Payment	144.71-					
		01/31/2021	Billing	7	Elec	896	Metered Entry	89.64					
		01/31/2021	Billing	8	Water	20	Metered Entry	21.00					
		01/31/2021	Billing	43	Sewer	20	Automatic Billing	28.00					
		01/31/2021	Billing	43	Garb	0	Automatic Billing	6.00					
		01/31/2021	Billing	43	S Tax	0	Automatic Billing	5.38					
		02/05/2021	Pmt	15	*	0	Utility Payment	150.02-					
		02/28/2021	Billing	7	Elec	806	Metered Entry	82.25					
		02/28/2021	Billing	8	Water	18	Metered Entry	19.80					
		02/28/2021	Billing	43	Sewer	18	Automatic Billing	26.40					
		02/28/2021	Billing	43	Garb	0	Automatic Billing	6.00					
		02/28/2021	Billing	43	S Tax	0	Automatic Billing	4.94					
		03/08/2021	Pmt	6	*	0	Utility Payment	139.39-					
		03/31/2021	Billing	7	Elec	869	Metered Entry	87.42					
		03/31/2021	Billing	8	Water	19	Metered Entry	20.40					
		03/31/2021	Billing	68	Sewer	19	Automatic Billing	27.20					
		03/31/2021	Billing	68	Garb	0	Automatic Billing	6.00					
		03/31/2021	Billing	68	S Tax	0	Automatic Billing	5.25					


Display


- ☒ Assistance applied
- ☒ Balance transfers
- ☒ Billing adjustments
- ☒ Billings
- ☒ Contract adjustments
- ☒ Contract billings
- ☒ Deposits applied
- ☒ Interest
- ☒ Payment adjustments
- ☒ Payments
- ☒ Reallocations
- ☒ Write-offs

Summarize

- ☒ Adjustments
- ☒ Billings
- ☒ Interest
- ☒ Payments

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

Customer number: 1.104.01
 Name: Smith, Dr. Ronald T.
 Date: 03/31/2021 Rotation/Period: 202103
 Type: Billing
 Adjustment type:
 Description: Metered Entry
 Reference number: 7 Sequence number: 1
 Service: Electric
 Quantity: 869
 Quantity billed: 869
 Amount: 87.42
 Rate: 103 (Electric - Commercial - City)
 Check number:
 Source ID:
 Final bill: No
 Manual: No
 Created by: Date: 03/31/2015 12:00 AM
 Last modified by: Date: 03/31/2015 12:00 AM

Refund check status:
 General Ledger accounts
 Debit account number: 5311520
 Credit account number: 5337100
 Updated: Yes
 NSF General Ledger accounts
 Debit account number:
 Credit account number:
 Updated: No
 Statement description:

 Comments:
 Usage calculation:
 Level 1: 500 @ 0.114211 = 57.1055
 Level 2: 369 @ 0.082165 = 30.31889
 Usage calculation total: 87.42

Close

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



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

Display	Compare	History	Transactions	Customer	Services	Location	Meters	Backflow	Contracts	Loans	Certification	Credit History	Supplemental
Customer 1	Customer 2	Equal Pay	Alternate Mailing	Additional Fields	Deposits	Assistance	Direct Pay	Attachments	Collection Comments	Notes			
<div> <div> Customer number: 1.104.01 Name: Smith, Dr. Ronald T. Secondary name: Smith, Donna Address line 1: 665 E Parkway Address line 2: City: Anycity State/Province: WI Zip/Postal code: 88888 Country/Region: Mail route: Attention: Telephone 1: Telephone 2: Fax: Email: RonaldT@deancare.com DL number: Secondary DL number: SSN: Secondary SSN: </div> <div> Delivery point: </div> <div> Master contact: Smith, Dr. Ronald T. <input type="button" value="v"/> Cosigner: None <input type="button" value="+"/> Landlord: None Cycle: 1 Customer type: Agricultural Group: None Collection code: None Connect date: 06/25/2010 Final bill date: Final bill reason: Alert message: <div></div> </div> </div>													

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.

2.154.01
Equal Pay

Brown, Jack
[540 Oak Hills Dr](#)
2154

540 Oak Hills Dr
Any city WI 88888

Account balance: 79.36
Balance due: 04/30/2018 [79.36](#) *
Last payment: 03/15/2018 66.00-

Display Compare History Transactions Customer Services Location Meters Backflow Contracts Loans Certification Credit History Supplemental

Customer 1 Customer 2 Equal Pay Alternate Mailing Additional Fields Deposits Assistance Direct Pay Attachments Collection Comments Notes

Active equal pay: Yes
Amount: 81.00
Calculation date: 05/22/2015

Equal pay A/R by service:

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

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.

Display	Compare	History	Transactions	Customer	Services
Customer 1	Customer 2	Equal Pay	Alternate Mailing	Additional	
Active: Yes Use until: 05/01/2022 Address line 1: PO Box 59990 Address line 2: City: Phoenix State/Province: AZ Zip/Postal code: 78788 Country/Region: Mail route: Telephone 1: Telephone 2: Delivery point:					

Customer User Defined Field values are displayed in Additional Fields.

Display	Compare	History	Transactions	Customer	Services	Location	Meters	Ba
Customer 1	Customer 2	Equal Pay	Alternate Mailing	Additional Fields	Deposits	A		
Field								
User-defined : Contact name							Nancy Drew - Office	
User-defined : Employer							State	
User-defined : Paperless Bill?							False	
User-defined : Renter							False	
User-defined : Senior Citizen							False	
User-defined : Veteran							True	
User-defined : Work phone							(385) 555-1212	

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.

Display	Compare	History	Transactions	Customer	Services	Location	Meters	Backflow	Contracts	Loans	Certification	Credit History	Supplemental
Customer 1	Customer 2	Equal Pay	Alternate Mailing	Additional Fields	Deposits	Assistance	Direct Pay	Attachments	Collection Comments	Notes			

Deposit activity:

	Date	Type	Service	Description	Amount
...	08/01/2019	Deposit	Elec	Deposit	100.00
...	03/31/2021	Deposit A...	Elec	Final Bill Deposit Applied	100.00-

Interest on deposits:

	Date	Service	Description	Amount
...	03/31/2021	Elec	Deposit Interest Accrued	8.33
...	03/31/2021	Elec	Final Bill Interest Applied	8.33-

Deposit summary by service:

Service	Amount
Electric	.00

0.00

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.

Display	Compare	History	Transactions	Customer	Services	Location	Meters	Backflow	Contracts	Loans	Certification	Credit History	Supplemental	
Customer 1	Customer 2	Equal Pay	Alternate Mailing	Additional Fields	Deposits	Assistance	Direct Pay	Attachments	Collection Comments	Notes				

Assistance activity:

Date	Type	Source ID	Reference Number	Sequence Number	Description	Amount
04/01/2016	Assistance payment		1	1	Assistance Payment	100.00

Approve assistance: Yes
 Balance: 100.00
 Summarize _____
☒ Assistance applied
☒ Assistance payments
☒ Assistance refunded

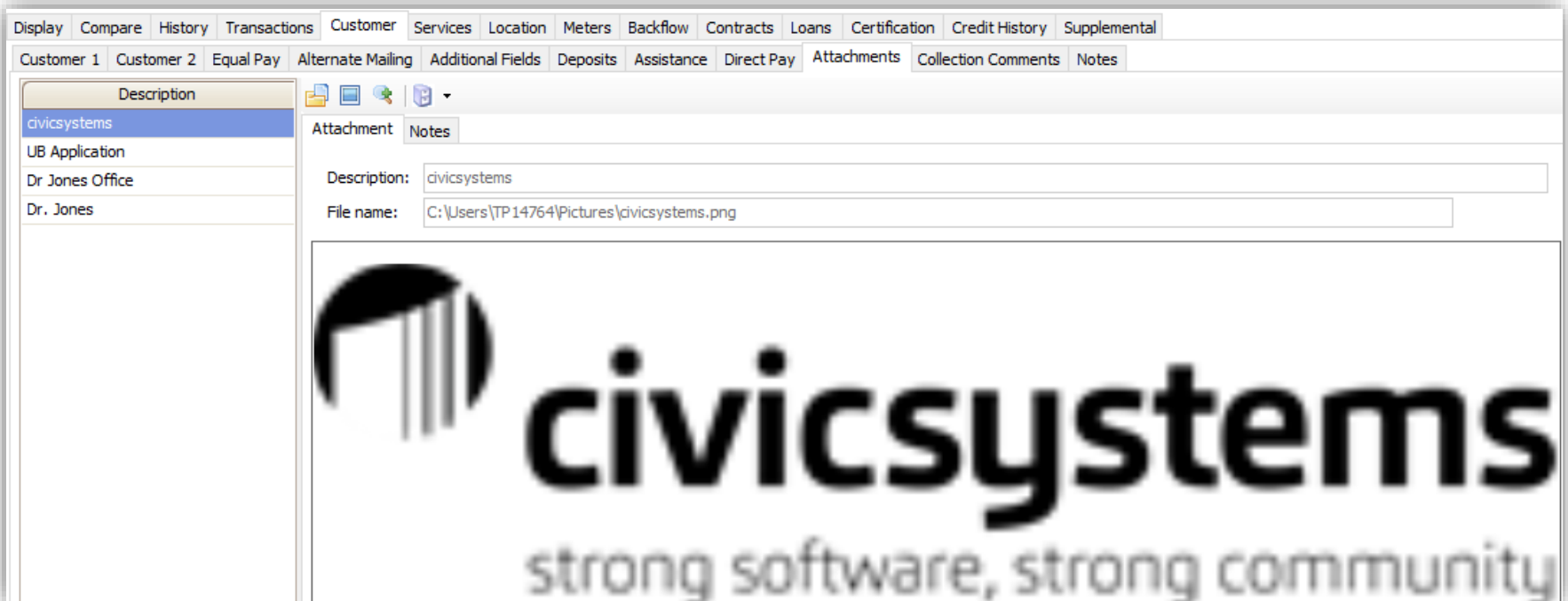
Direct Pay shows the bank and direct pay status for ACH Customers.

Display	Compare	History	Transactions	Customer	Services	Location	Meters	Backflow	Contracts	Loans	Certification	Credit History	Supplemental
Customer 1	Customer 2	Equal Pay	Alternate Mailing	Additional Fields	Deposits	Assistance	Direct Pay	Attachments	Collection Comments	Notes			

Bank	Transaction Type	Status	Type	Amount/Percent
CHECKING - 1ST STATE BANK (101202303) (1)	Checking Payment	Prenotification	Amount	.00

Customer

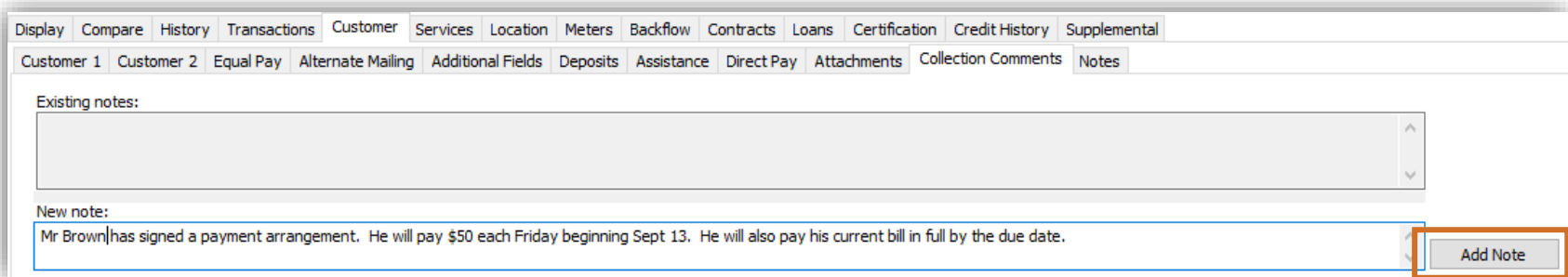
Attachments – any files can be attached to the customers accounts, applications, budget letters, utility bills, notices or pictures. Note: when using attachments make sure they are saved in a place on the server that will not change. Example Clarity\Attachments. The attachments are links like Microsoft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



The screenshot displays the Civicsystems software interface. At the top, a menu bar includes options like Display, Compare, History, Transactions, Customer, Services, Location, Meters, Backflow, Contracts, Loans, Certification, Credit History, and Supplemental. Below this, a sub-menu bar shows Customer 1, Customer 2, Equal Pay, Alternate Mailing, Additional Fields, Deposits, Assistance, Direct Pay, Attachments (which is currently selected), Collection Comments, and Notes. On the left side, there is a list box titled 'Description' containing the following items: civicsystems (highlighted), UB Application, Dr. Jones Office, and Dr. Jones. The main area of the window is divided into two tabs: 'Attachment' and 'Notes'. The 'Attachment' tab is active, showing a 'Description:' field with the value 'civicsystems' and a 'File name:' field with the value 'C:\Users\TP14764\Pictures\civicsystems.png'. Below these fields is a large preview area displaying the Civicsystems logo and the text 'civicsystems strong software, strong community'.

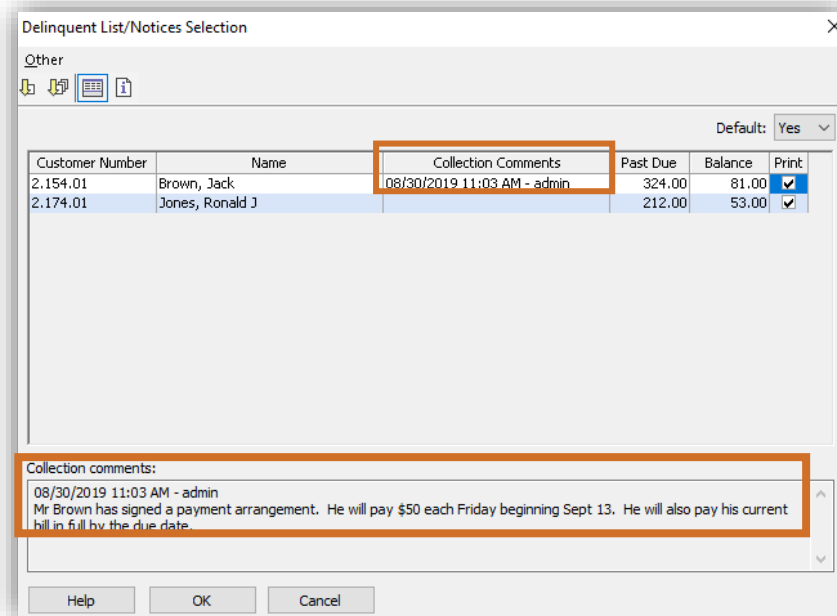
Customer

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.



The screenshot shows the 'Customer Inquiry' window with the 'Collection Comments' tab selected. The 'Existing notes' section is empty. The 'New note' section contains the text: 'Mr Brown has signed a payment arrangement. He will pay \$50 each Friday beginning Sept 13. He will also pay his current bill in full by the due date.' An 'Add Note' button is highlighted with an orange box.

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



The screenshot shows the 'Delinquent List/Notices Selection' dialog box. It contains a table with columns: Customer Number, Name, Collection Comments, Past Due, Balance, and Print. The 'Collection Comments' column for the first row is highlighted with an orange box. Below the table, the 'Collection comments:' section shows the note: '08/30/2019 11:03 AM - admin Mr Brown has signed a payment arrangement. He will pay \$50 each Friday beginning Sept 13. He will also pay his current bill in full by the due date.' This section is also highlighted with an orange box.

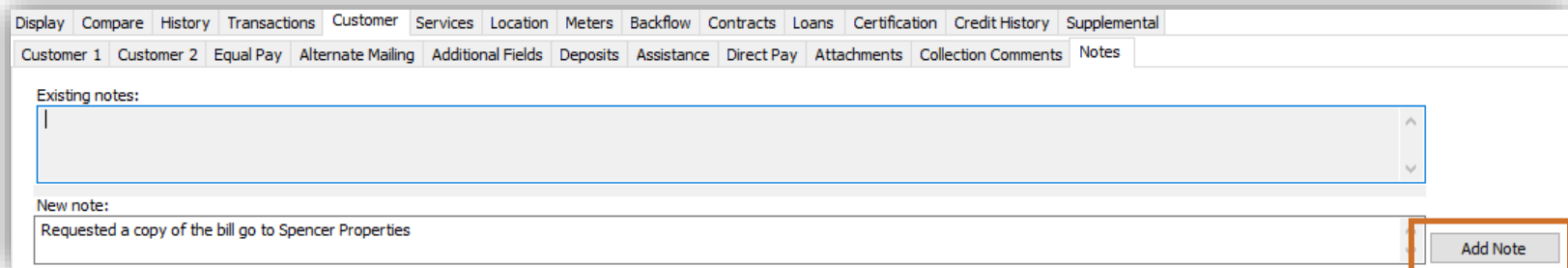
Customer Number	Name	Collection Comments	Past Due	Balance	Print
2.154.01	Brown, Jack	08/30/2019 11:03 AM - admin	324.00	81.00	<input checked="" type="checkbox"/>
2.174.01	Jones, Ronald J		212.00	53.00	<input checked="" type="checkbox"/>

Collection comments:
 08/30/2019 11:03 AM - admin
 Mr Brown has signed a payment arrangement. He will pay \$50 each Friday beginning Sept 13. He will also pay his current bill in full by the due date.

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.



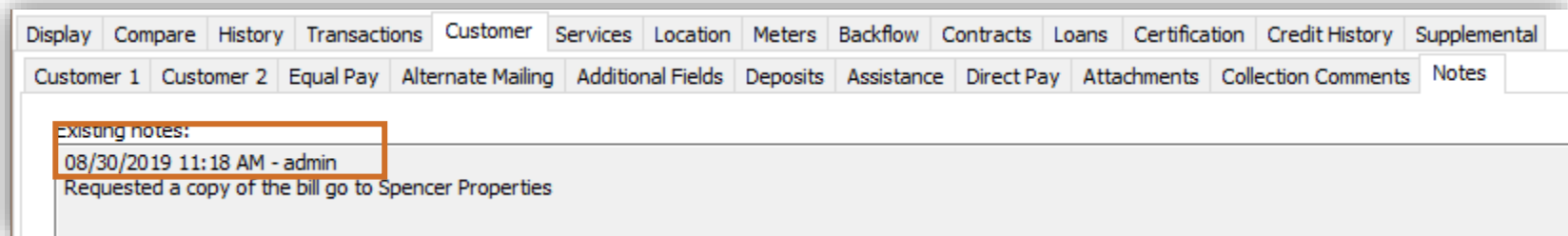
Display Compare History Transactions **Customer** Services Location Meters Backflow Contracts Loans Certification Credit History Supplemental

Customer 1 Customer 2 Equal Pay Alternate Mailing Additional Fields Deposits Assistance Direct Pay Attachments Collection Comments **Notes**

Existing notes:

New note:
 Requested a copy of the bill go to Spencer Properties

Add Note



Display Compare History Transactions **Customer** Services Location Meters Backflow Contracts Loans Certification Credit History Supplemental

Customer 1 Customer 2 Equal Pay Alternate Mailing Additional Fields Deposits Assistance Direct Pay Attachments Collection Comments **Notes**

Existing notes:

08/30/2019 11:18 AM - admin
 Requested a copy of the bill go to Spencer Properties

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.

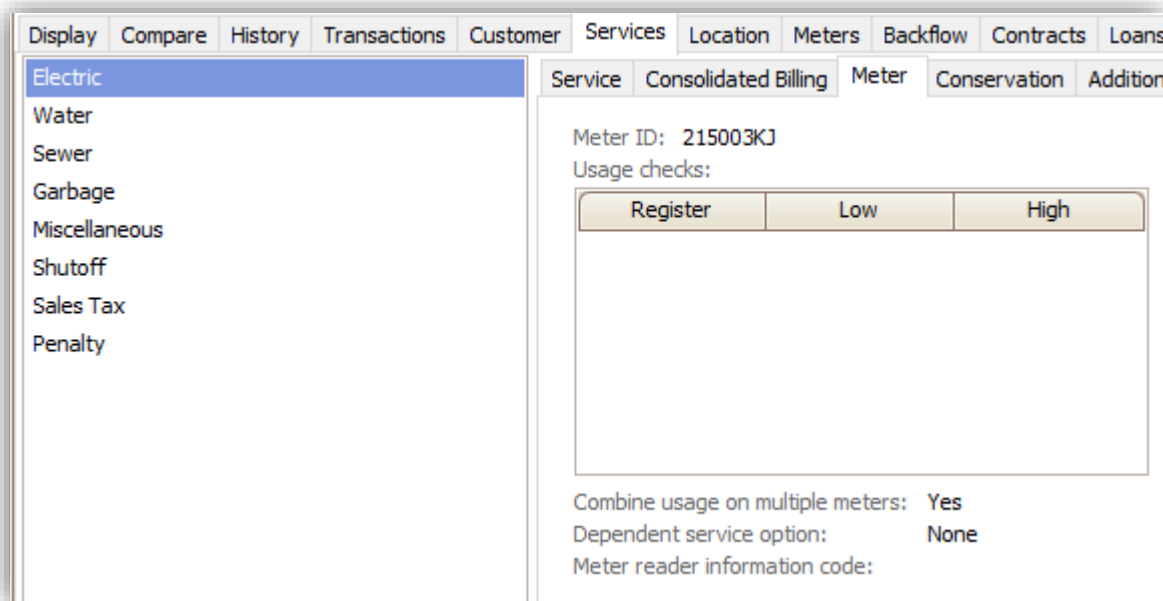
Display	Compare	History	Transactions	Customer	Services	Location	Meters	Backflow	Contracts	Loans	Certification
<div> <div> Electric Water Sewer Garbage Miscellaneous Shutoff Sales Tax Penalty </div> <div> <div>Service</div> <div>Consolidated Billing</div> <div>Meter</div> <div>Conservation</div> <div>Additional Fields</div> <div>Notes</div> </div> <div> <div>Rate:</div> <div>Frequency:</div> <div>Units/Shares:</div> <div>Quantity:</div> <div>Use other service:</div> <div>Quantity based on:</div> <div>Credit calculation average:</div> <div>Use credit calculation:</div> <div>Minimum amount:</div> <div>Connect date:</div> <div>Temporary disconnect date:</div> <div>Final disconnect date:</div> <div>Abbreviation 1:</div> <div>Abbreviation 2:</div> <div>Discount:</div> <div>Tax exempt:</div> <div>Deposit interest rate:</div> <div>Equal pay</div> <div>Amount:</div> <div>Calculation date:</div> </div> <div> <div>103 (Electric - Commercial - City)</div> <div>Monthly</div> <div>0</div> <div>0</div> <div>No</div> <div></div> <div>0</div> <div>No</div> <div>.00</div> <div></div> <div></div> <div></div> <div>Elec</div> <div>EL</div> <div>.00%</div> <div>.00%</div> <div>0</div> <div></div> <div>.00</div> <div></div> </div> </div>											

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.



The screenshot shows the 'Services' tab in the Civicsystems software. On the left, a list of services is displayed: Electric (selected), Water, Sewer, Garbage, Miscellaneous, Shutoff, Sales Tax, and Penalty. On the right, the 'Meter' sub-tab is active, showing the 'Meter ID: 215003KJ' and 'Usage checks:' section. The 'Usage checks' section contains three buttons: 'Register', 'Low', and 'High'. Below this, the 'Combine usage on multiple meters:' is set to 'Yes', the 'Dependent service option:' is set to 'None', and the 'Meter reader information code:' is empty.

Service	Consolidated Billing	Meter	Conservation	Addition
Electric				
Water				
Sewer				
Garbage				
Miscellaneous				
Shutoff				
Sales Tax				
Penalty				

Meter ID: 215003KJ
Usage checks:

Register	Low	High

Combine usage on multiple meters: Yes
Dependent service option: None
Meter reader information code:

Location

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

Display		Compare	History	Transactions	Customer	Services	Location	Meters	Backflow
<div>Location</div> <div>Additional Fields</div> <div>Service Orders</div> <div>Stock Certificates</div> <div>Attachments</div> <div>Notes</div>									
Parcel ID:	632-1268-850-0								
Service address:	4601 American Parkway Madison WI 53718								
Delivery point:									
Country/Region:									
Mail route:									
House number:	4601								
House number suffix:									
Street direction:									
Street:	American Parkway								
Apartment/Unit:									
Latitude:									
Longitude:									
Number of units:	0								
Block:									
Lot:									
Unit number:									
PIN:									
Subdivision:									
Landlord:	Spencer Properties <input type="button" value="v"/>								
Inside city limits:	Yes								

Display		Compare	History	Transactions	Customer	Services	Location	Meters	Backflow				
<div>Location</div> <div>Additional Fields</div> <div>Service Orders</div> <div>Stock Certificates</div> <div>Attachments</div> <div>Notes</div>													
<table border="1"> <thead> <tr> <th>Field</th> <th></th> </tr> </thead> <tbody> <tr> <td>User-defined : Property tax ID</td> <td></td> </tr> </tbody> </table>										Field		User-defined : Property tax ID	
Field													
User-defined : Property tax ID													

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

Display	Compare	History	Transactions	Customer	Services	Location	Meters	Backflow	Contracts	Loans	Certification	Credit History	Supplemental
<div>Location</div> <div>Additional Fields</div> <div>Service Orders</div> <div>Stock Certificates</div> <div>Attachments</div> <div>Notes</div>													
	Completed Date	Created Date	Status	Service Order Number	Description	Completed Comment							
<input type="button" value="v"/>		04/21/2021	Pending	623	Water Meter Check for Leaks								
<input type="button" value="v"/>	09/18/2019	09/18/2019	Completed	620	Water Meter Testing								
<input type="button" value="v"/>		03/31/2015	Pending	614	Water Meter Replacement Reading								
<input type="button" value="v"/>		02/26/2015	Cancelled	600	Water Meter Check for Leaks								

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.

Display	Compare	History	Transactions	Customer	Services	Location	Meters	Backflow	Contracts	Loans	Certification	Credit History	Supplemental								
<table border="1"><thead><tr><th>Meter ID</th><th>Service</th></tr></thead><tbody><tr><td>215003KJ</td><td>Electric</td></tr><tr><td>6002</td><td>Water</td></tr><tr><td>1776</td><td>Garbage - Non-Metered</td></tr></tbody></table>														Meter ID	Service	215003KJ	Electric	6002	Water	1776	Garbage - Non-Metered
Meter ID	Service																				
215003KJ	Electric																				
6002	Water																				
1776	Garbage - Non-Metered																				
<div>Meter: 215003KJ</div> <div>Route-Sequence: 1-180 Multiplier: 1.0000 Sequence number: 1 Size: 150</div> <div>EMR code: EMR ID: MXU ID: MXU type:</div>																					

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.

Display	Compare	History	Transactions	Customer	Services	Location	Meters	Backflow	Contracts	Loans	Certification	Credit History	Supplemental
---------	---------	---------	--------------	----------	----------	----------	--------	----------	-----------	-------	---------------	----------------	--------------

Meter ID	Service
215003KJ	Electric
6002	Water
1776	Garbage - Non-Metered

Meter: [215003KJ](#)

Route-Sequence: 1-180 EMR code:

Multiplier: 1.0000 EMR ID:

Sequence number: 1 MXU ID:

Size: 150 MXU type:

Activity	Meter	Credit Usage	Additional Fields	Attachments	Notes
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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

Activity		Meter	Credit Usage	Additional Fields	Attachments	Notes
Meter location:		<div>Pole NW corner</div>				
Status:	Active					
Manufacturer:	Zeus					
Other ID:	67581V					
Original installation date:	01/22/2015					
Retired date:						
MXU port ID:						
MXU port position:						
Latitude:						
Longitude:						
MTU callback time:						

Type	Title	Dials	Code
Register 1: Reading	Reading	5	
Register 2: None		0	
Register 3: None		0	
Register 4: None		0	
Register 5: None		0	
Register 6: None		0	

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

Activity		Meter	Credit Usage	Additional Fields	Attachments	Notes
Field		Data				
User-defined : Buffalo Box						

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.

Display	Compare	History	Transactions	Customer	Services	Location	Meters	Backflow	Contracts	Loans	Certification	Credit History	Supplemental
Period	Charges	Due Date	Balance	Delinquent	Shutoff	Collection Code		Periods:					
04/30/2017	56.19	05/31/2017	56.19					Active since:					
05/31/2017	57.69	06/30/2017	57.69					Last shutoff:					
06/30/2017	60.84	07/31/2017	60.84					Equal pay —					
07/31/2017	67.15	08/31/2017	67.15					Amount:					
08/31/2017	63.99	09/30/2017	63.99					Calculated					
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.

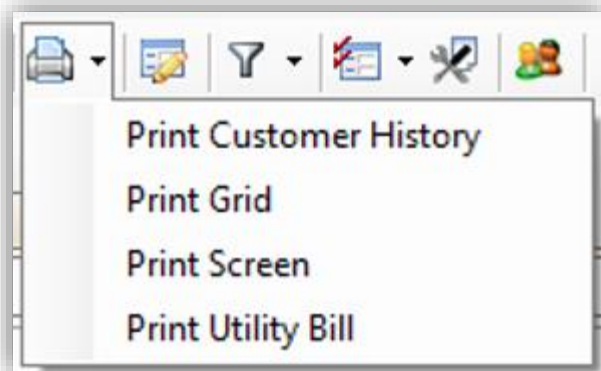
 History Tracking will display any changes made to fields that have tracking turned on.

History Tracking			
Date	By	From	To
Table: Customer			
History Record: 3			
Column: Name			
8/9/2016 9:47 PM	admin	Welling, Martin E.	Carter, Clayton

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 2.147.01, Clayton Carter, 791 Palisades Dr					9/15/2021 Page: 1
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	

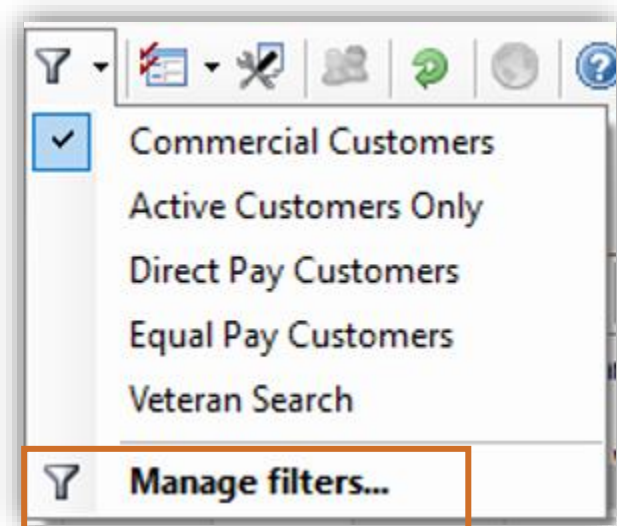
Icon Ribbon



 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.

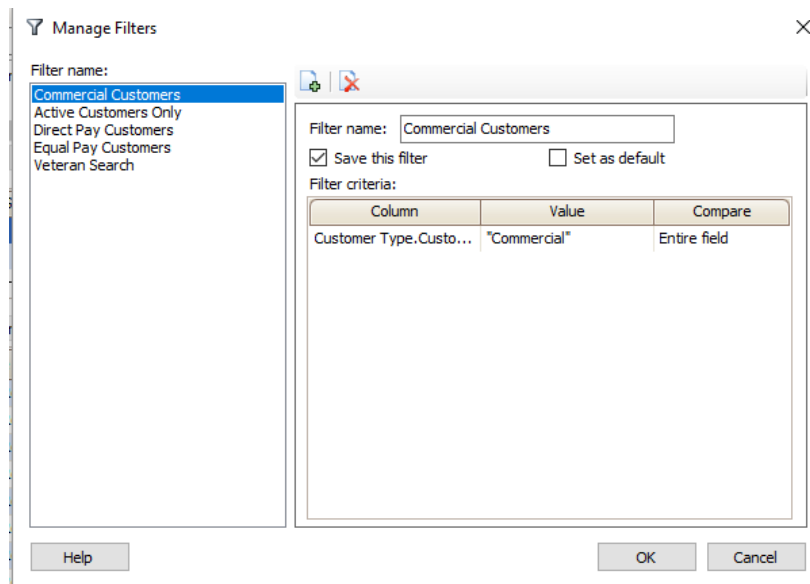
To create a filter, click on Manage filters



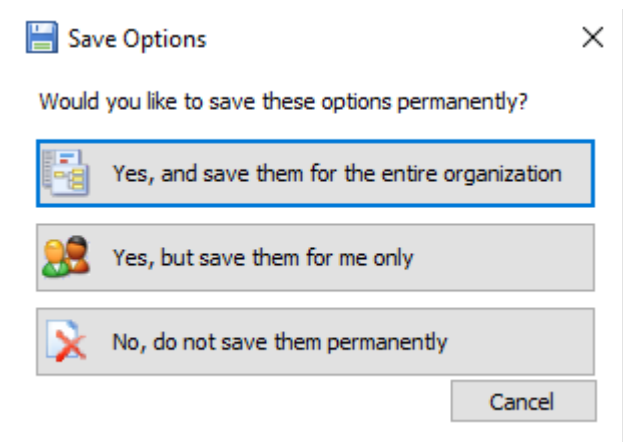
Icon Ribbon



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



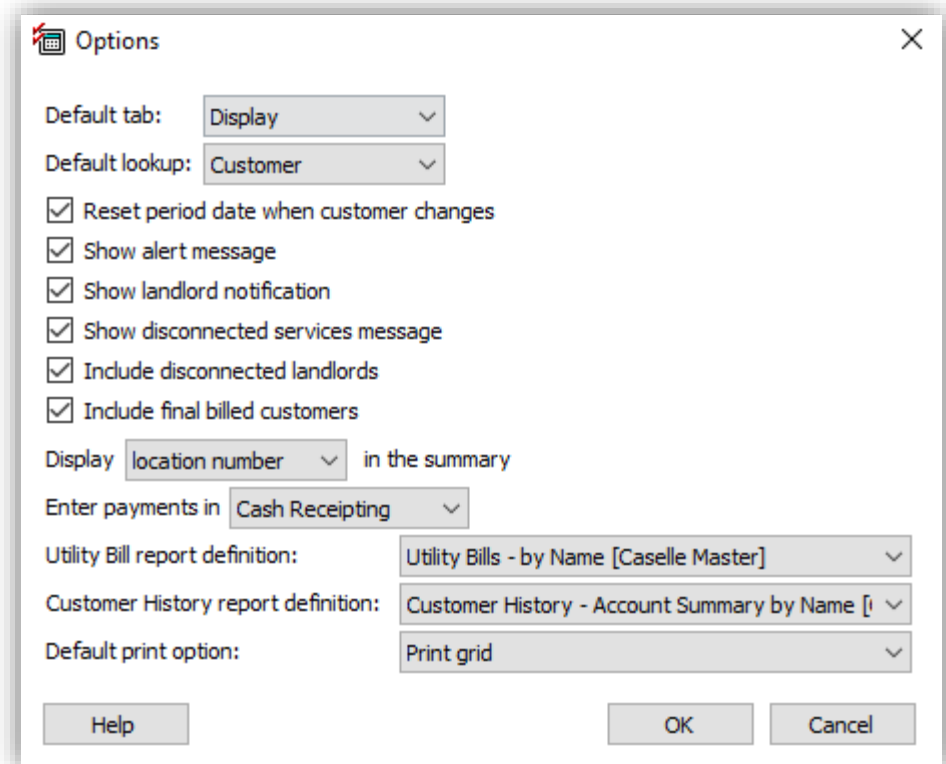
 Options allows some customization in Customer Inquiry.

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.



Options

Default tab:

Default lookup:

☒ Reset period date when customer changes

☒ Show alert message

☒ Show landlord notification

☒ Show disconnected services message

☒ Include disconnected landlords

☒ Include final billed customers

Display in the summary

Enter payments in

Utility Bill report definition:

Customer History report definition:

Default print option:

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.

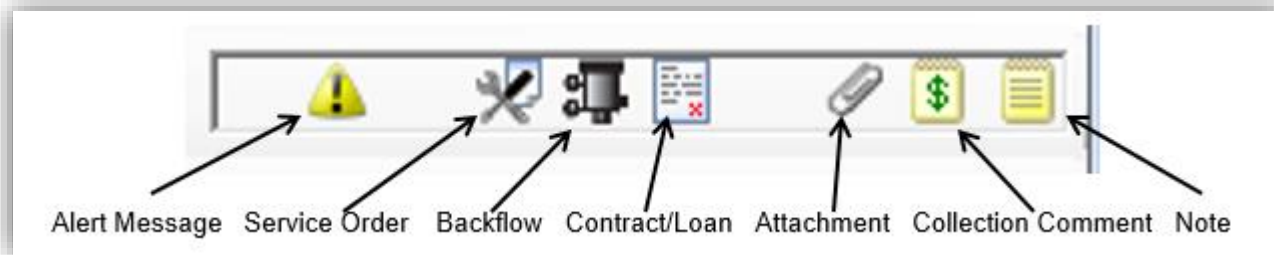


Links to the online help screens.



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.





QUESTIONS?