

## Step-by-Step Procedure

### FINAL THE ACCOUNT

In **Account Gateway**, locate the customer account that will be moving out.

Click on the **Calls** menu.

Create the **Move Out Service Order** following normal utility procedure.

Click **OK** to save.

*Account Gateway > Calls Menu > Utility Defined Move Out Service Order*

The screenshot shows a software window titled "Move Out" with a standard Windows interface (minimize, maximize, close buttons). The window contains several sections for data entry:

- Call Information:** Call: MOVOUT, MOVOUT, MOVE OUT; Order: MOVOUT; Account: 102173 37 BRADLEY COOPER; Date: 2019-10-25 11:28:42; Service: 721, CATCHFLY LN, BROWN; Call number: 0.
- Caller Information:** Requested: 2019-10-25; Scheduled: 2019-10-25; Caller name: BRADLEY COOPER; Phone: 920-468-9187; Note: (empty).
- Completion / Status:** Status: S (dropdown), SCHEDULED; Priority: (dropdown); Assigned to: (dropdown); Print: (checkbox); Launch Move In: (checkbox).
- Moving To:** Account no: (empty); Serv Addr: (empty); Scheduled in: 2019-10-25.
- Forwarding Address:** Address 1: (empty); Address 2: 337 EASY WAY RD; City: SLACKER TOWN; State: WI; Zip: 56545; Mode: (empty).
- Schedule Notes:** MOVE OUT; FINAL ALL SERVICES

At the bottom left of the window, there is a status indicator: a green dot followed by the text "Ready".

After obtaining the final reads for the meter(s), transfer the account to the Billing Journal.

From the **Billing Entry** tab, click on the **Services** tab.

Change the **Bill Type** flag to '5' to create a Final Bill.

*Journals > Billing and Adjustments > Billing Journal > Billing Entry > Services*

The screenshot shows a software interface for 'Billing Journal (BROWSE) NEW'. At the top, there are navigation icons and a '1 of 1' indicator. Below this, there are tabs for 'Main' and 'More'. A header section contains fields for 'Batch number: 514', 'Created by: aenfelt', 'Cycle:', 'Route:', and 'Consumption month: 2019-10'. A row of tabs includes 'Billing Entry' (highlighted with a red box), 'Error Log', 'Reading Verification', 'Date Correction', 'Calculation', 'Verification Listing', 'Bill Print', 'Journal Print', 'Journal Statistics', and 'Post'. Below the tabs is a sub-header 'Billing Information (BROWSE)' with its own navigation icons and '1 of 5' indicator. Underneath, there are more tabs: 'Services' (highlighted with a red box), 'Meters', 'Statistic', and 'Final New Orders'. The main content area is divided into two sections: 'Account Information' and 'Billing Information'. The 'Account Information' section includes fields for 'Account: 102173', '37', and 'BRADLEY COOPER', 'Service: E', 'ELECTRIC', '721', 'CATCHFLY LN', 'SLACKER TOWN', and 'BROWN'. The 'Billing Information' section includes 'Bill type: 5' (with 'Final' in a dropdown menu, highlighted with a red box), 'Delayed: ', 'Occupancy: N', 'Bill from: 2019-10-05', and 'To: 2019-10-25'. The status bar at the bottom left shows 'Ready'.

Navigate to the **Final New Orders** tab.

Enter the applicable Service Orders from the dropdown menus for the following fields:

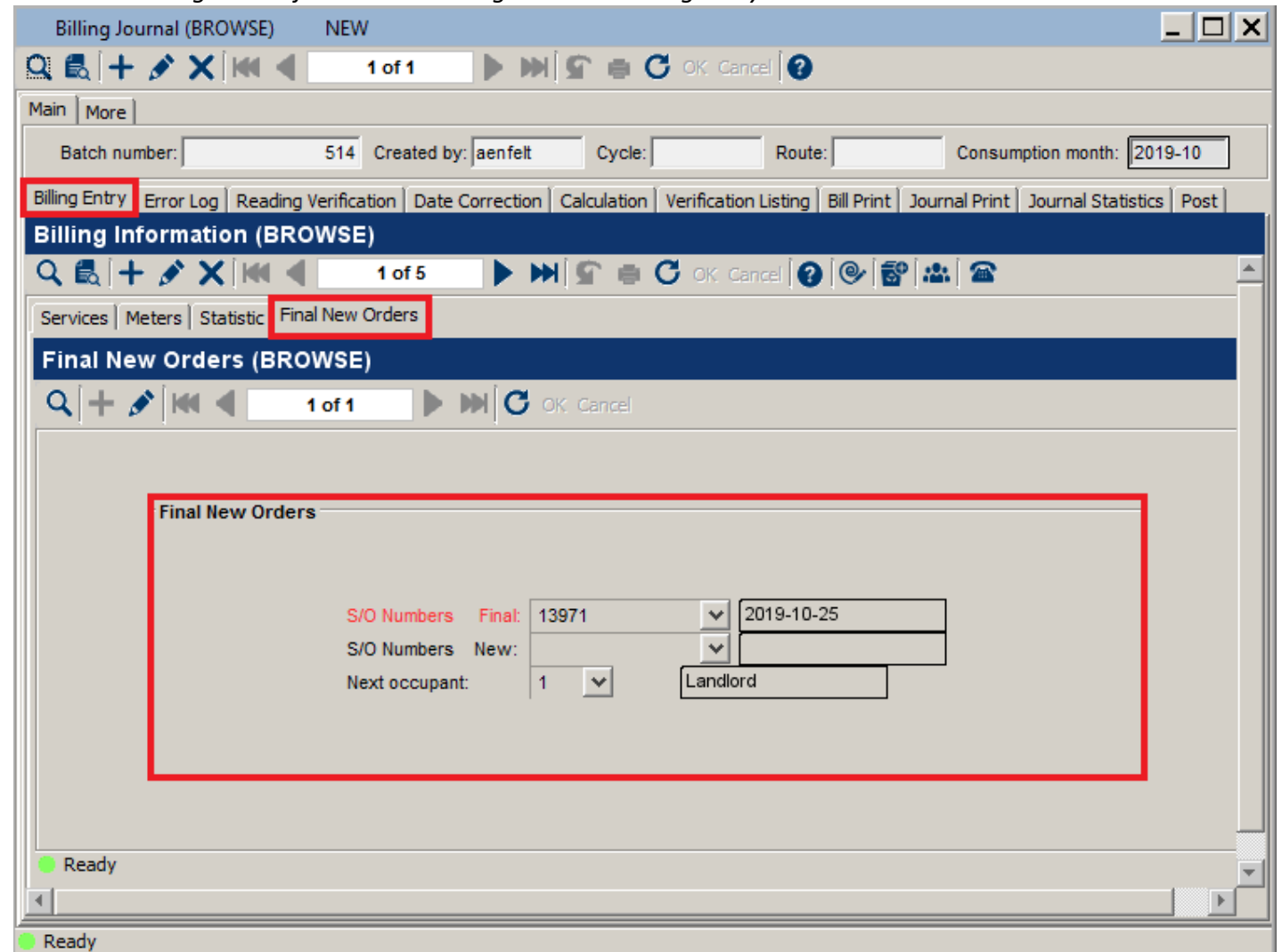
- **S/O Numbers Final**
- **S/O Numbers New**

No Move In Service Order?

Set the **Next Occupant** field per utility procedure.

- 0 = None
- 1 = Landlord
- 2 = Vacant

*Journals > Billing and Adjustments > Billing Journal > Billing Entry > Final New Orders*



Complete the remainder of the Billing Journal process per utility procedure.

Verify the Due Date on the Calculations tab and during the Journal Print process.

The Due Date entered in the Billing Journal will be the date that appends to the Service Details table.

The dates for the current levels will each be 1 day later than the due date.

*Journals > Billing and Adjustments > Billing Journal > Billing Entry > Calculations*

Billing Journal (BROWSE) CALCULATED

Batch number: 514 Created by: aenfelt Cycle: Route: Consumption month: 2019-10

Billing Entry Error Log Reading Verification Date Correction **Calculation** Verification Listing Bill Print Journal Print Journal Statistics Post

**Billing Calculation (BROWSE)**

Selection Criteria

Bill date: 2019-10-25

Due date: 2019-11-16

Recalculate all entries:

Reconcile month:

Consumption month: 2019-10

Check if recalculating all entries

OK Cancel

Ready

Post the Billing Journal after verifying the Due Date is accurate and all remaining processes complete.

Journals > Billing and Adjustments > Billing Journal > Billing Entry > Journal Print

ALWAYS ON UTILITIES      CYCLE: 1    ROUTE: 1    BILLING JOURNAL    00000000587    aenfelt    10/25/2019 15:40    Page: 1  
 BATCH: 514    CONSUMPTION YEAR-MONTH: 2019-10

SERVICE	BILL TYPE	BILL CODE	CAT	LAST READ	READ DATE	BILL DATE	<b>DUE DATE</b>	BILL ELAP DAYS	ELAP DAYS	BALANCE FORWARD	CURRENT	LATE CHARGE	NET
METER	POS.	PREV READ	CURR READ	TYPE	UNITS	DAYS	MULT	USAGE	USAGE BILLED	DEMAND BILLED	POWER FACTOR		
102173-37	BRADLEY COOPER	1	1	185	721	CATCHFLY LN							
ELECTRIC	5 FINAL RG-1	11	10/05/2019	10/25/2019	10/25/2019	<b>11/16/2019</b>	20	20	82.27	BROWN	Cust :	253	
RECYCL	5 FINAL RECYC	10	10/05/2019	10/25/2019	10/25/2019	11/16/2019	20	20	12.34			142.72	
SEWER	5 FINAL S.625	10	10/05/2019	10/25/2019	10/25/2019	11/16/2019	20	20	12.80			20.95	
STORMWTR	5 FINAL SWC1	10	10/05/2019	10/25/2019	10/25/2019	11/16/2019	20	20	3.36			20.91	
WATER	5 FINAL W.625	10	10/05/2019	10/25/2019	10/25/2019	11/16/2019	20	20	39.09			5.69	
1220180002	1 RG-1		010875		011028	MR 1 kWh	20	1.0	153.00	468.00			
1220180002	2 RG-10F		037104		037419	MR 1 kWh	20	1.0	315.00				
1200000354	1 W.625		027372		027486	CE H High F	20	1.0	114.00	114.00F		114.00	
E-CTC EC :	0.33	E-CTC LI :	0.33	E-CNTY TAX :	0.28	E-KWH :	49.24	NET :	255.19				
E-MIN :	8.00	E-PCAC :	-0.56	E-ST TAX :	2.83	ESALES :	0.00	LATE CHRGE:	2.35				
R-CHRG :	8.61	S-MIN :	4.51	S-USAGE :	3.60	U-CHRG :	2.33	GROSS :	257.54				
W-BLOCK1 :	6.09	W-MIN :	9.21	W-PUB FIRE:	10.53								

The Move Out Service Order status changes to Complete upon posting the Billing Journal.

Account Gateway > CARE > Call Maintenance

Created On	By	Order Number	Call Type	Status	Scheduled	Completed	Note
2019-10-25 10:55	aenfelt	13971	MOVOUT	C	2019-10-25 00...	2019-10-25	

The Billing Due Date and the Current Level 1, 2, & 3 dates update upon posting the Billing Journal.

Account Gateway > Main Selections > Service Details > Main tab > Additional tab

**Billing Information**

	Total	Current	Overdue	Interest	Late Charge
ELECTRIC	142.72	60.45	82.27	0.00	0.00
	255.19	105.33	149.86	0.00	0.00

**Additional**

	Due Date	Level 1	Level 2	Level 3
Current:	2019-11-16	2019-11-17	2019-11-17	2019-11-17
Last:	2019-10-17	2019-10-18	2019-10-27	2019-10-27

**Notice Details**

Last sent:	3	Late charge:	0.81
Last notice date:	2019-08-29	Overdue interest:	1.14
Exempt:	N		

In the example, the Current Due Date is 11/16/2019. Each of the Levels (1, 2, & 3) updated to 11/17/2019 because the Control Table was set to 1 day after the bill due date for final accounts.

The earliest this final account would pull into a Credit Control batch is the day after the Due Date (11/17/2019).