

# Step-by-Step Procedure

## Part 1: Service Order Creation

Navigate to the **Account Gateway** module.

Locate the account, based on the service address, where the new applicant will take occupancy.

The account displayed is for the current occupant.

Account Gateway > Search > New Service Address of Applicant

Account Management View (BROWSE) **ACTIVE**

Quick Info Account Details

**Account Info**

Account: 8151912 3 Active:

Name: JULIA CHILD

Customer: 4016

**Service Address**

House #: 3742 Mod: Street: SOUFFLE BLVD Apt:

Region: City: WHITEHALL State: WI

Home: 715-645-8819 Bus: Zip: 54773

Ready

Service Summary (BROWSE)

| Name       | Balance | Due Date   | Deposit | Dep Req'd | Last Read  | Last Billed | Amount |
|------------|---------|------------|---------|-----------|------------|-------------|--------|
| ELECTRIC   | 21.21   | 2020-12-24 | 0.00    | 0.00      | 2020-12-01 | 2020-12-05  | 21.21  |
| PUBLIC BEN | 0.64    | 2020-12-24 | 0.00    | 0.00      | 2020-12-01 | 2020-12-05  | 0.64   |

Totals: Balance: 21.85 Deposit: 0.00 Dep Req'd: 0.00 Amount: 21.85

Move to the **Calls** tab.

Select the **Move In** Service Order.

Enter the required information based on utility practices.

Click **OK** to create the service order.

*Note: This will move the new occupant into the selected service address and create a Move Out service order for the current occupant.*

Account Gateway > Calls Menu > Move In Service Order

The screenshot shows a web application window titled "Move In". At the top, there are navigation tabs: Sewage, Commercial Info, Additional Info, Contacts, Web Access Information, Print Order, Move-in Web Access Information, and Attach Letter. Below these are sub-tabs: Main, More, Activity, Move In Info, Move In Services, Deposits, Payment Plan, Grid Rate, Payment Arrangement, Factored Rates, and Customer Setup. The main form area is divided into several sections:

- Call Information:** Call: MOVEIN, Account: 8151912, Service: 3742, Order: MOVEIN, Date: 2021-04-06 14:49:03, Call number: 0.
- Move Dates:** Requested: 2021-04-06, Scheduled: 2021-04-06.
- Completion / Status:** Status: S (SCHEDULED), Priority, Assigned to, Print: .
- Caller Information:** Customer: 4377, Name: GORDON RAMSEY, Phone: 715-892-4377, SSN, Driver's license, Note.
- Address:** Address 1, Address 2: 9322 WELLINGTON WAY, City: WHITEHALL, State: WI, Zip: 54773, Mode.
- Schedule Notes:** REMOTE ACTIONS: MOVE ORDERS TEST.

Open the **Call Maintenance** table.

Two new service orders should be present:

- 1 – Move In
- 1 – Move Out (Auto Out/Final)

Highlight the **Move Out (Auto Out)** service order.

Click the **Call Details** tab.

Account Gateway > CARE > Call Maintenance

The screenshot displays the 'Account Management View (BROWSE) ACTIVE' interface. At the top, there is a navigation bar with search and navigation icons. Below this, the 'Quick Info' section is divided into 'Account Info' and 'Service Address'. The 'Account Info' section includes fields for Account (8151912), Name (JULIA CHILD), and Customer (4016). The 'Service Address' section includes House # (3742), Street (SOUFFLE BLVD), City (WHITEHALL), and Zip (54773). Below the account information, there is a 'Service Summary (BROWSE) Call Maintenance (BROWSE)' section. This section contains a table with the following data:

| Created On       | By       | Order Number | Call Type | Status | Scheduled        | Completed  | Note             |
|------------------|----------|--------------|-----------|--------|------------------|------------|------------------|
| 2021-04-06 14:49 | agiessen | 15489        | AUTOOUT   | S      | 2021-04-06 00:00 |            |                  |
| 2021-04-06 14:49 | agiessen | 15488        | MOVEIN    | S      | 2021-04-06 00:00 |            |                  |
| 2020-07-09 15:29 | System   | 15039        | OUTAGE    | C      | 2020-07-09 00:00 | 2020-07-09 | 2020-07-09 15:29 |
| 2020-01-05 09:41 | System   | 14567        | OUTAGE    | C      | 2020-01-05 00:00 | 2020-01-05 | 2020-01-05 09:41 |
| 2019-09-09 20:11 | System   | 13351        | OUTAGE    | C      | 2019-09-09 00:00 | 2019-09-09 | 2019-09-09 20:11 |
| 2019-06-21 07:39 | System   | 11661        | OUTAGE    | C      | 2019-06-21 00:00 | 2019-06-21 | 2019-06-21 07:39 |

Navigate to the **Status Change** tab.

Click the **Edit** icon.

Update the status from 'S' (Scheduled) to 'R' (Remote Scheduled).

This change allows the system to recognize the remote action.

Click **OK** to save the change.

Account Gateway > CARE > Call Maintenance > Auto Out (Move Out) Service Order > Status Change

**Account Management View (BROWSE) ACTIVE**

Quick Info Account Details

**Account Info**

Account: 8151912 3 Active:

Name: JULIA CHILD

Customer: 4016

**Service Address**

House #: 3742 Mod: Street: SOUFFLE BLVD Apt:

Region: City: WHITEHALL State: WI

Home: 715-645-8819 Bus: Zip: 54773

Ready

Service Summary (BROWSE) Call Maintenance (BROWSE)

Browse Call Details

Main Standard Charges Status Change Schedule Notes Completion Notes Transaction Log Print Order Field Internal Notes Attach Letter

**Status Change (EDIT)**

Creation Information

Created on: 2021-04-06 14:49 Created by: agiessen

Required: 2021-04-06 Scheduled: 2021-04-06

Assigned to:

Status Information

Status: R Scheduled AMI Remote Action

Note:

Completed:

| St... | Short desc | Long desc                   |
|-------|------------|-----------------------------|
| A     | AMI CREATE | AMI CREATED                 |
| F     | AMI FAILED | AMI FAILED                  |
| I     | NOT USED   | NOT USED DUE TO CONVERSION  |
| L     | LOGGED CAL | LOGGED CALL                 |
| P     | AMI PEND   | AMI PENDING                 |
| R     | SCHEDULED  | Scheduled AMI Remote Action |
| S     | SCHEDULED  | SCHEDULED                   |
| V     | VOIDED     | VOIDED                      |

Printed: 0 Released: 0

System:

Please select the new status

Ready

List contents editable Power Link