

Part 3: Transfer Reads to Billing Journal

To Release for Billing:

Place a **Checkmark** in the box next to specific move orders or use the **Select/Unselect** button at the bottom of the table to select all orders.

Click the **Release for Billing** button.

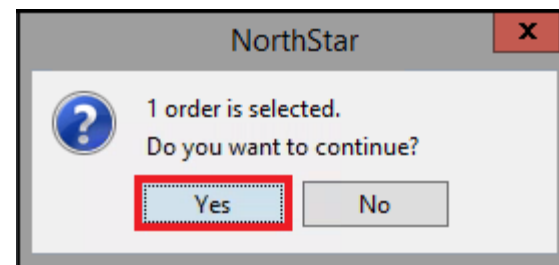
Upon release, the orders become available for billing using the Final Reading Load process located in the Journals module.

Credit Control > Remote Actions > Move Orders > Completed

The screenshot shows the 'Remote Moves (BROWSE)' application window. At the top, there are navigation icons and a status bar indicating '2 of 2' items. Below this, there are input fields for 'Batch I.D.: AMI MOVES TEST', 'Batch number: 24', 'Created by: agiessen', and 'Schedule time: 2021-04-06 15:09'. A tabbed interface at the top of the table area shows 'Load Move Orders', 'Scheduled', 'Sent', 'Failed', and 'Completed' (which is selected). The table below has columns: Order, House, Street, Unit, Select, E-Required, E-Collected, W-Requi..., W-Collec..., Scheduled, MoveIn ..., MoveIn ..., Disc Order, Send, and Respond. The first row contains the data: 15489, 3742, SOUFFLE BLV, [checked box], 1, 1, 0, 0, Apr 6, 2021, Apr 6, 2021, MOVEIN, and 2021-04-0... At the bottom of the window, there are two sections: 'Disconnects' with buttons 'Select/Unselect for Disconnects' and 'Generate Remote Disconnects'; and 'Billing' with buttons 'Select/Unselect' and 'Release for Billing'.

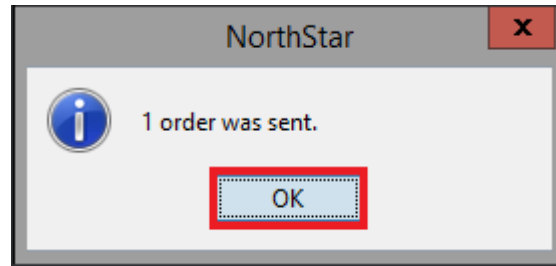
A pop-up window appears confirming the number of orders selected for release.

Click **Yes** to continue the release for billing process.



A secondary pop-up window appears confirming the number of orders sent.

Click **OK**.



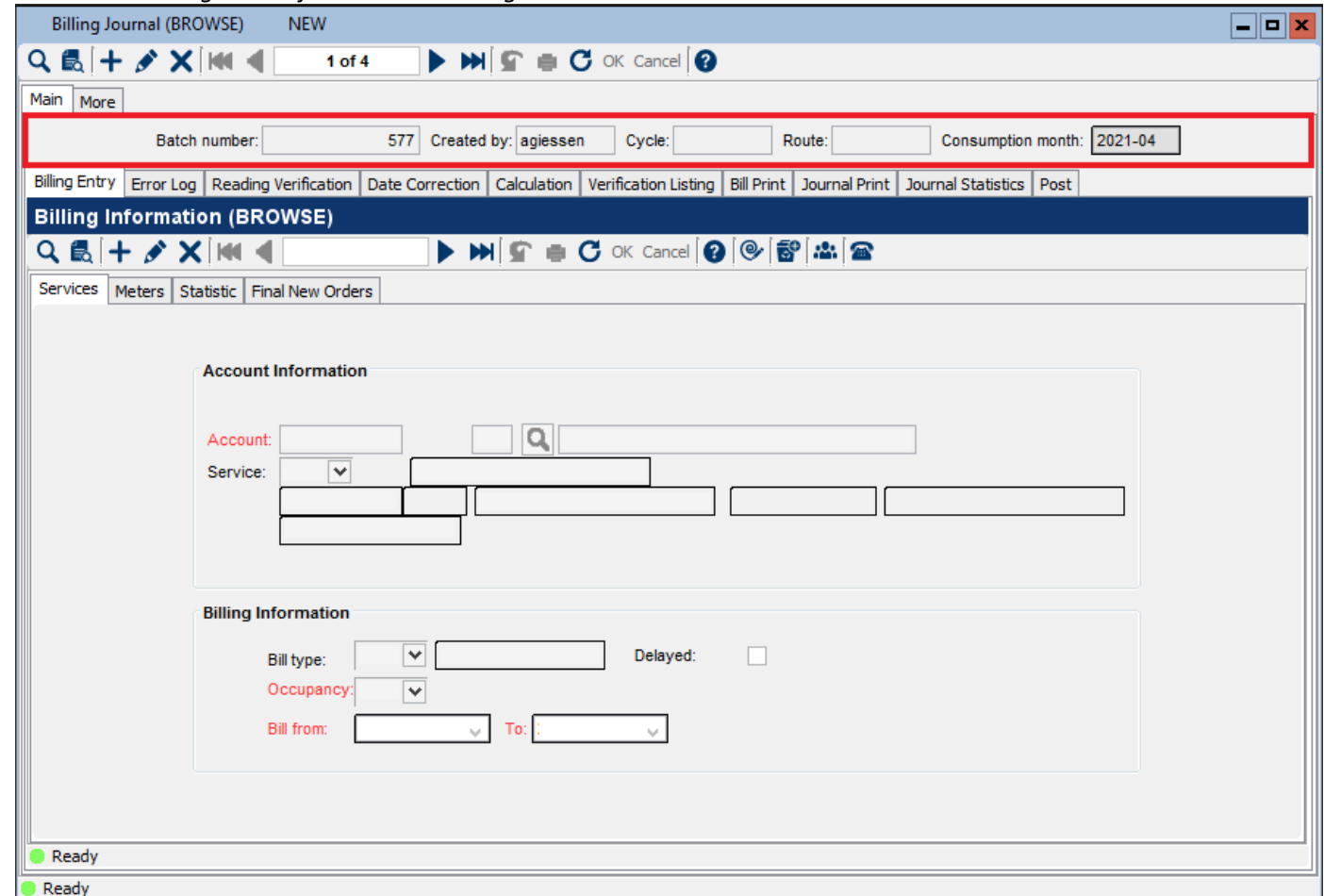
From the **Journals** module, open the **Billing Journal** table.

Locate the Billing Journal the Move Out service orders should transfer to, or create a new Billing Journal.

Note the **Batch Number** the Move Out orders are to transfer.

In the example, the completed Move Out order will transfer to Batch Number 577.

Journals > Billing and Adjustments > Billing Journal



Open the **Final Reading Load** table located in the Journals module.

Enter the load criteria:

- Account Number
- Cycle
- Completion Date

Note: If using Completion Date, use the Advanced Find to enter a date range.

At **Batch Number**, select the billing journal batch from the dropdown menu.

Click **OK** to initiate the final reading load transfer to billing.

Close the window when the transfer completes.

Journals > Final Reading Load

Final Reading Load (FIND)

Account No.:

Cycle:

Completion Date: 2021-04-07

Batch Number: 577

Please select Batch number...

OK Cancel

Return to the **Billing Journal** batch.

Review the transferred Move Out orders. Verify the following information populated correctly.

Services tab:

- **Bill Type** = 5 (Final)
- **Bill from / Bill to**

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 buttons and a status bar showing '1 of 4'. Below this, a header section contains fields for 'Batch number: 577', 'Created by: agiessen', 'Cycle:', 'Route:', and 'Consumption month: 2021-04'. A menu bar includes 'Billing Entry', 'Error Log', 'Reading Verification', 'Date Correction', 'Calculation', 'Verification Listing', 'Bill Print', 'Journal Print', 'Journal Statistics', and 'Post'. The main content area is titled 'Billing Information (BROWSE)' and has a sub-menu with 'Services', 'Meters', 'Statistic', and 'Final New Orders'. The 'Services' tab is active, displaying two sections: 'Account Information' and 'Billing Information'. The 'Account Information' section shows 'Account: 8151912', 'Service: E', and address details '3742 SOUFFLE BLVD WHITEHALL'. The 'Billing Information' section shows 'Bill type: 5 Final', 'Occupancy: N', and 'Bill from: 2021-02-28 To: 2021-04-06'. A red arrow points to the 'Bill type' dropdown. At the bottom, there are status indicators: 'Ready' and 'Use the navigation buttons to browse records'.

Meters tab:

- Reading Previous
- Reading Current
- Reading Usage
- Reading Type
- Read Dates

Journals > Billing and Adjustments > Billing Journal > Billing Entry > Meters

Billing Journal (BROWSE) JOURNAL PRINTED/POSTING IN PROGRESS

Batch number: 577 Created by: agiessen Cycle: Route: Consumption month: 2021-04

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

Billing Information (BROWSE)

Services Meters Statistic Final New Orders

Billing Entry Details (BROWSE)

Account Information

Account: 8151912 3 JULIA CHILD 3742 SOUFFLE BLVD WHITEHALL

Meter: 6020169752 Position: 1 Time Band: KWH DL Multiplier: 1.0 Dials: 6 Billable: 1 Bill code: RG-1 Cant read: Reader ID: Readings units: 1 kWh Readings previous: 21556 Readings current: 21707 Readings usage: 151.00 Readings type: MR METER READ Read date previous: 2021-02-28 Read date current: 2021-04-06 Days: 36 Phone read:

Ready Ready Ready

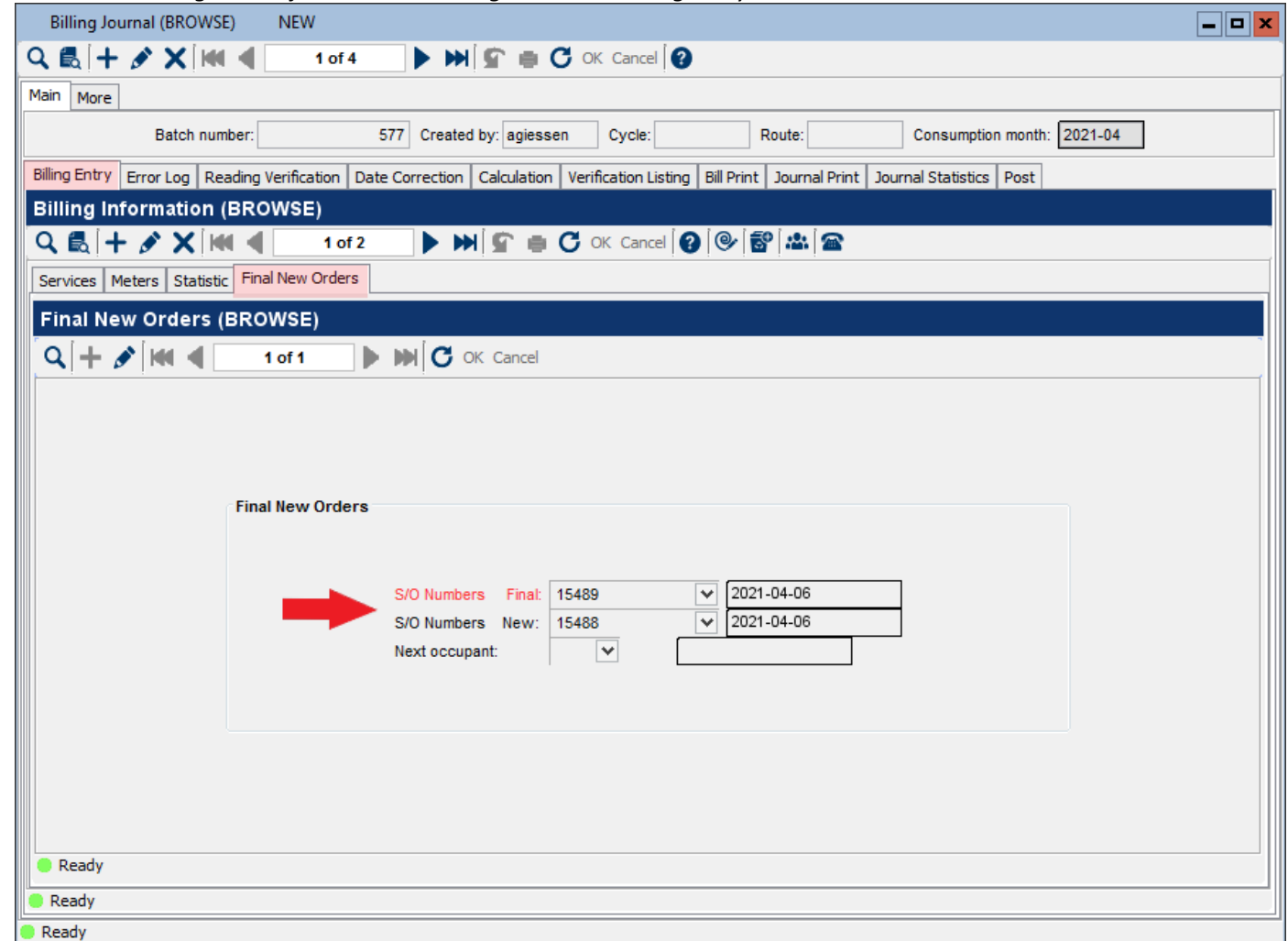
Final New Orders:

- **S/O Numbers Final** = Move Out service order
- **S/O Numbers New** = Move In service order

Proceed with billing following the utilities' normal procedure.

Once the Billing Journal posts, the Move Out and Move In orders complete in Account Gateway.

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



Return to **Account Gateway** to view the updated accounts.

The example shows the account is now Final after the Billing Journal posted.

Account Gateway

Account Management View (BROWSE) **FINAL**

2 of 3

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	0.00	2020-12-30	0.00	0.00	2020-12-10	2020-12-11	0.00
WATER	0.00	2020-12-30	0.00	0.00	2020-12-10	2020-12-11	0.00
SEWER	0.00	2020-12-30	0.00	0.00	2020-12-10	2020-12-11	0.00
PUBLIC BEN	0.00	2020-12-30	0.00	0.00	2020-12-10	2020-12-11	0.00

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

The example shows the same account with the new occupant moved in.

Account Gateway

Account Management View (BROWSE) **ACTIVE**

1 of 6

Quick Info Account Details

Account Info

Account: 8151912 4 Active:

Name: GORDON RAMSEY

Customer: 4377

Service Address

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

Region: City: WHITEHALL State: WI

Home: 715-892-4377 Bus: Zip: 54773

Ready

Service Summary (BROWSE)

Name	Balance	Due Date	Deposit	Dep Req'd	Last Read	Last Billed	Amount
ELECTRIC	0.00		0.00	0.00			0.00
WATER	0.00		0.00	0.00			0.00
SEWER	0.00		0.00	0.00			0.00
PUBLIC BEN	0.00		0.00	0.00			0.00

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