

NorthStar Module

CARE

1. New Service Order Setup
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NEW SERVICE ORDER SETUP

What is a Service Order?

A service order is a request for the Utility to perform a specific task. A service order may include equipment replacement, disconnection or reconnection of a service, or re-reading a meter. Every service order request must have a corresponding service order code.

Benefit of Using NorthStar

NorthStar allows the Utility to track every service order at the account level providing a 'trail' of all account events.

Setup Requirements

To create a service order, each of the four (4) tables must be setup.

- Service Order Code Maintenance
- Call Codes / Types
- Service Order Formatting Setup
- CSR Call Menu Maintenance



Service Order Code Maintenance

Care > Service Order Codes

Open the **Service Order Codes** table from the *CARE* module.

Click **OK** to view a listing of all current service orders.

Review the current list of Service Order Code.

If the Service Code does not exist, one will need to be created.

Order code	Description
DEFER	DEFERRED PAYMENT ARRANGEMENT
DISC-E	DISCONNECT ELECTRIC
ENDRNW	END RENEWABLE ENERGY
HIGHBL	HIGH BILL COMPLAINT
MOVEIN	MOVE IN
MOVOUT	MOVE OUT
REC-E	RECONNECT ELECTRIC- NO CHARGE
RENEW	START RENEWABLE ENERGY
SDIS-E	SEASONAL DISCT-ELEC
SREC-E	SEASONAL RECONNECT-ELECTRIC
STLITE	STREET LIGHT OUT
TREE	TREE TRIMMING
WTRLK	WATER LEAK
YRHIST	1 YEAR OF HISTORY
AUTOUT	AUTOMATIC MOVE OUT
CSA_IN	AUTO LANDLORD
DISC-C	DISCONNECT CABLE
DISC-W	DISCONNECT WATER
REC-WC	RECONNECT WATER- W/\$25 CHARGE
REC-W	RECONNECT WATER- NO CHARGE
SDIS-W	SEASONAL DISCT-WATER/SEWER
DISCON	DISCONNECTION
SREC-W	SEASONAL RECONNECT-WATER/SEWER

Click the **Add** icon.

Enter the **Order Code** with a maximum of 6 characters.

Enter the **Description** for the new Order Code.

Leave the **Exclude if Type** field blank.

At **Post to**, select where the Order Code will post.

- 1 = PUB (account)
- 2 = A/R
- 3 = G/L

The **Pseudo** field will only be available if the order code is posting to a G/L.

At **Order Type**, select what type of order this will be.

- 1 = Out
- 2 = In
- 3 = Disc
- 4 = Recon
- 5 = Generic
- 6 = Inact
- 7 = Active
- 8 = Restrictions

The **Start Alert** and **End Alert** sections default to 'S' (scheduled) and 'C' (completed).

Click **OK** to save the new Service Order Code.

Service Order Code Maintenance (ADD)

None Selected

OK Cancel

Service Order Code

General Information

Order code: WINTNP

Description: WINTER MORATORIUM NON-PAY

Exclude if Type: [dropdown]

Post to: 1 [dropdown]

Pseudo: [dropdown]

Order type: 5 [dropdown]

Show as alert:

Container Pickup:

Start Alert Selection

Start alert: S

Select: [dropdown]

End Alert Selection

End alert: C

Select: [dropdown]

Department Selection

Departments: [text box]

Select: [dropdown]

Valid Services (BROWSE)

0 of 0

OK Cancel

Browse Record Details

Process order	Service	Description	Stat. code	Description	Standard charge
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Ready

In the **Valid Services** section of the table, enter all the services that apply to the new Order Code.

Click the **Add** icon to add each service that applies to the new Order Code (i.e. Electric, Water, Sewer, Fire Protection, Public Benefits).

Click **OK** to save each entered service.

Note: If a charge applies to a Service Order (i.e. Reconnection Fees), set the Stat Code and Standard Charge amount on the Record Details tab.

Service Order Code Maintenance (BROWSE)

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Service Order Code

General Information

Order code: DISCON
 Description: DISCONNECTION
 Exclude if Type: [v]
 Post to: 1 [v]
 Pseudo: [v]
 Order type: 3 [v]

Show as alert:
 Container Pickup:

Start Alert Selection

Start alert: S
 Select: [v]

End Alert Selection

End alert: C
 Select: [v]

Department Selection

Departments: E
 Select: [v]

Valid Services (BROWSE)

1 of 5

Browse | Record Details

Process order	Service	Description	Stat. code	Description	Standard charge
	E	ELECTRIC			
	F	PUBLIC FP			
	P	PUBLIC BEN			
	S	SEWER			
	W	WATER			

Use the navigation buttons to browse records

Call Codes / Types

Open the **Call Codes / Types** table from the *CARE* module to associate the new Service Order Code to the proper call type.

Click the **Add** icon to setup a new Call Code.

At **Call Code**, enter the Service Order Code created in the Service Order Code Maintenance table.

At **Description**, use the same description used in the service order code maintenance table.

Enter the **Short Description** as the call code.

Click **OK** to save the new Call Code.

Care > *Call Codes / Types*

Call Codes / Types (ADD)

Call Type Maintenance

Call code: WINTNP Description: WINTER MORATORIUM NON-PAY Short description: WINTNP

Call Types / Codes Details Setup (BROWSE)

Call type	Description	Short desc	Order code	Service	Checklist	Enable in GIS
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Ready

In the **Call Types / Codes Detail Setup** section, add the record details.

The **Call Type**, **Description**, and **Short Description** should be the same as was entered above.

Under **Call Type Details**, select the **Order Code** from the dropdown menu.

Leave all other fields blank.

Click **OK** to save the Call Types/Codes details.

The screenshot displays a software interface for managing call codes. The main window is titled "Call Codes / Types (BROWSE)" and shows a list of 15 records. The selected record is "1 of 1". Below this, there is a "Call Type Maintenance" section with fields for "Call code: WINTNP", "Description: WINTER MORATORIUM NON-PAY", and "Short description: WINTNP".

The "Call Types / Codes Details Setup (BROWSE)" section is highlighted with a red border. It contains two tabs: "Browse" and "Record Details". The "Record Details" tab is active, showing the following fields:

- Call Type Description:**
 - Call type: WINTNP
 - Description: WINTER MORATORIUM NON-PAY
 - GIS Enabled:
 - Short description: WINTNP
- Call Type Details:**
 - Order code: WINTNP (dropdown menu) | WINTER MORATORIUM NON-PAY (text field)
 - Utility: (dropdown menu) | (text field)
 - Checklist: (dropdown menu) | (text field)

At the bottom of the window, there is a green dot and the text: "Use the navigation buttons to browse records".

Service Order Format Codes Setup

CARE > Service Order Foramt Codes Setup

Open the **Service Order Format Codes Setup** table.

Click **Add**.

Enter an **Item No** (number) that is currently not in use by another service order.

Enter a **Description** for the Item No. The description should match the one used in the Service Order Code Maintenance table.

Click **OK** to save the Service Order Format Code.

If there are additional service order code details, add them in the lower portion of the table.

Note: Not all Service Order Format Codes require additional details setup.

The screenshot shows two overlapping windows. The top window, titled "Service Order Format Codes Setup (BROWSE)", has a toolbar with search, add, edit, delete, and navigation icons, and a status bar showing "64 of 64" records. The main content area is titled "Service Order Format Codes" and contains two input fields: "Item no:" with the value "75" and "Description:" with the value "WINTER MORATORIUM NON-PAY". The bottom window, titled "Service Order Codes Details Setup (BROWSE)", has a toolbar with search, add, edit, delete, and navigation icons, and a status bar showing "0 of 0" records. It has two tabs: "Browse" (selected) and "Record Details". The main content area is titled "Service Order Codes Details" and contains two input fields: "Line no:" and "Include:". The status bar at the bottom of the second window shows "Ready".

Service Order Formatting Setup

CARE > Service Order Formatting

Open the **Service Order Formatting** table.

Click **OK** to bring up all service order codes.

Select the newly created Order Code from the list by double clicking the Order Code.

The screenshot shows a software window titled "Service Order Formatting Setup (BROWSE)". The window contains a table with two columns: "Order code" and "Description". The table lists various service order codes and their corresponding descriptions. The row for "WINTNP" (WINTER MORATORIUM NON-PAY) is highlighted in blue. The window also features a search bar, navigation buttons, and a status bar at the bottom.

Order code	Description
NEW-C	CABLE INSTALL
NEW-C1	CABLE INSTALL TIER 1
NEW-CD	CABLE INSTALL DIGITAL
OUTAGE	AMI OUTAGE
REC-E	RECONNECT ELECTRIC- NO CHARGE
REC-EC	RECONNECT ELECTRIC- W/\$20 CHRG
REC-EX	RECONNECT ELECTRIC- W/\$60 CHRG
REC-W	RECONNECT WATER- NO CHARGE
REC-WC	RECONNECT WATER- W/\$25 CHARGE
REC-WX	RECONNECT WATER- W/\$40 CHARGE
RECONN	RECONNECTION
REMPRM	C-REMOVE PREMIUM CHANNELS
RENEW	START RENEWABLE ENERGY
SDIS-E	SEASONAL DISC'T-ELEC
SDIS-W	SEASONAL DISC'T-WATER/SEWER
SREC-E	SEASONAL RECONNECT-ELECTRIC
SREC-W	SEASONAL RECONNECT-WATER/SEWER
STLITE	STREET LIGHT OUT
TERM-C	TERMINATE CABLE SERVICE
TREE	TREE TRIMMING
WINTNP	WINTER MORATORIUM NON-PAY
WTRLK	WATER LEAK
YRHIST	1 YEAR OF HISTORY

In the lower portion of the table, enter the record details.

At **Order**, enter 1. Each subsequent Order will increase sequentially.

At **Selection**, choose from the dropdown menu the Item No (number) created in the Service Order Format Codes Setup on the previous table.

If the Item No (number) does not exist, use the **Power Link** button to create the Item No. The **Power Link** button opens the Service Order Format Codes Setup table.

Click **OK** to save the changes.

The screenshot shows two overlapping windows. The top window is titled "Service Order Formatting Setup (BROWSE)" and displays "Order code: WINTNP" and "Description: WINTER MORATORIUM NON-PAY". The bottom window is titled "Service Order Formatting Details Setup (EDIT)" and shows "Order: 1" and "Selection: 75" with a dropdown arrow. Below this is a table with the following data:

Item No	Description
60	COMPLETION INFORMATION/SIGN-OFFS
63	serviceman remarks
64	MISC/SEASONAL CABLE
65	STREET/YARD LIGHT OUT
66	TREE TRIMMING
67	DISCONNECT/RECONNECT CABLE (NON-...
68	ADD PREMIUM CABLE CHANNELS
69	REMOVE PREMIUM CABLE CHANNELS
70	EXISTING CABLE SERVICES
71	RENEWABLE ENERGY PROGRAM
72	TERMINATE CABLE SERVICE
73	INTERNET CUSTOMER:
74	MISC
75	WINTER MORATORIUM NON-PAY

At the bottom of the table, there is a "List contents editable" button with a lightbulb icon and a "Power Link" button with a magnifying glass icon. A blue arrow points from the "List contents editable" button to the "Power Link" button. A red box highlights the table and the "Power Link" button.

CSR Call Menu Maintenance

CARE > CSR Call Menu Maintenance

Open the **CSR Call Menu Maintenance** table to add the new Call Code.

Click **OK** to load all current call codes.

Click the **Add** icon.

Enter a **Menu Order** number not previously used by another order code.

Leave **Service Type** blank, unless the Call Code pertains to only one service (i.e. Electric).

At **Call Code**, select the new call code from the dropdown menu.

The **Call Type** is the same code selected as the Call Code.

The **Description** field auto-populates when the Call Code field is entered.

Click **OK** to save the changes.

CSR Call Menu Maintenance (BROWSE)

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OK Cancel

CSR Call Menu

Menu order: 40

Service type: [dropdown] [text input]

Call code: WINTNP [dropdown] WINTER MORATORIUM NON-PAY

Call type: WINTNP [dropdown]

Description: WINTNP

Use the navigation buttons to browse records