

Billing Back Office Induction

Trainer:

Name:

DOCUMENT CONTROL

i. Version History

This table records the status and version history of this deliverable.

Version	Date	Author	Version History
V0.1	22 September 2015	Sarah Lewis	Creation of Document
V0.2	2 October 2015	Sarah Lewis	Amendments
V			

ii. Reviewers

This table records the reviewers responsible for recommending authorisation of this deliverable.

Version	Name	Role	Response
V1	Sarah Rock	Operations Manager	
V1	Gill Gittins	Operations Manager	
V1	Dawn Hyde	Senior Back Office Manager	

iii. Consultees

This table records subject matter experts consulted about this deliverable.

Version	Name	Role	Response
V0.1	Sarah Rock	Operations Manager	
V0.1	Gill Gittins	Operations Manager	
V0.1	Dawn Hyde	Senior Back Office Manager	

iv. Informed

This table records the distribution list for the completed deliverable.

Version	Name	Name	Name



INTRODUCTION

This Induction course has been designed to ensure you have a smooth transition into your new role with Extra Energy.

OBJECTIVES

The overall aim of the course is for all learners to:

“To gain knowledge of Extra Energy’s expectations and Customer Service Standards. To also learn Industry partners, terminology and common customer queries to enable each person to complete their job effectively.”

PERSONAL OBJECTIVE

- ❖
- ❖
- ❖



OUR VISION

*"To be the envy of every energy retailer in the way we
Manage our customers, employees and business"*

OUR MISSION

*"To create the "Big 7" in five years whilst leading with
exceptional value and customer service"*

OUR VALUES

- ❖ Love your customers
- ❖ Value each other
- ❖ Do the right thing
- ❖ Think differently
- ❖ Be excellent

EXTRAENERGIE – GERMANY

Extraenergie started in Germany and is very successful. It is one of the top 5 suppliers out of 1100. Extraenergie is a lean company with around 500 staff mainly in customer care and sales support. Extraenergie also has the lowest customer churn rate in the market of 14.1% while the market average is above 28 %

2008

2009

2010 Quarter 1

2010 Q2

2010 Q3

2010 Q4

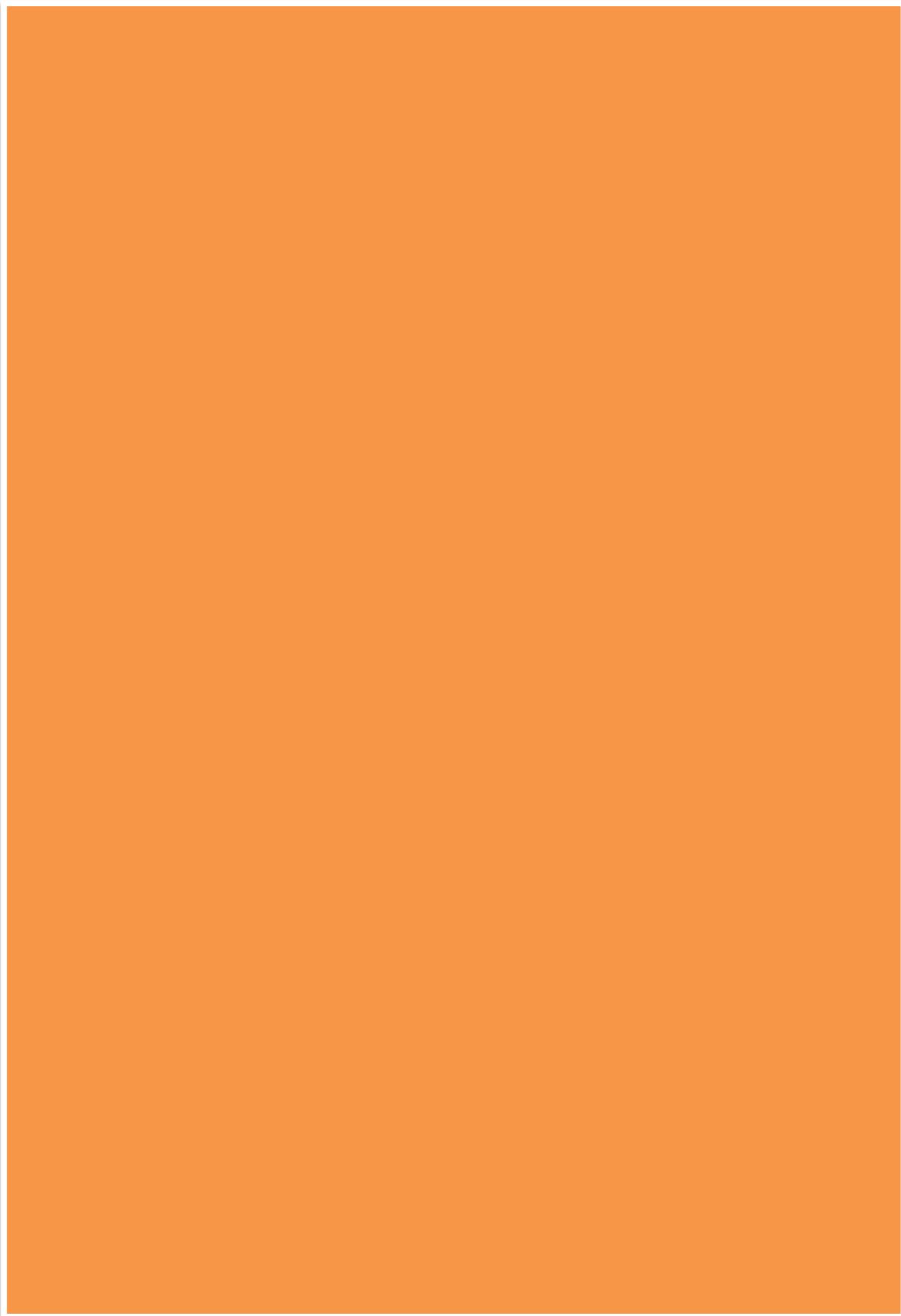
2011

2012

2013



NOTES





HEALTH AND SAFETY

Activity



EQUALITY AND DIVERSITY

Activity

PREJUDICE AND DISCRIMINATION

Prejudice -

Discrimination –

HARASSMENT AND VICTIMISATION

Harassment

Harassment means offensive or intimidating behaviour - sexist language or racial abuse, which aims to humiliate, undermine or injure its target or has that effect

Victimisation

Victimisation means treating somebody less favourably than others because they tried to make, or made, a complaint about discrimination.



STANDARDS OF CONDUCT

How can we ensure we treat our customers “Fair, honest, transparent, appropriate and professional”?

INDUSTRY OVERVIEW

Activity

What do you already know? Think about what is in the media, personal experience etc.

Notes



INDUSTRY OVERVIEW

Activity –Distribution

HISTORY OF THE INDUSTRY

Up until 1990s people were supplied for their gas by British Gas and for their electricity they were supplied by their public electricity supplier (PES), in the West Midlands this was MEB.

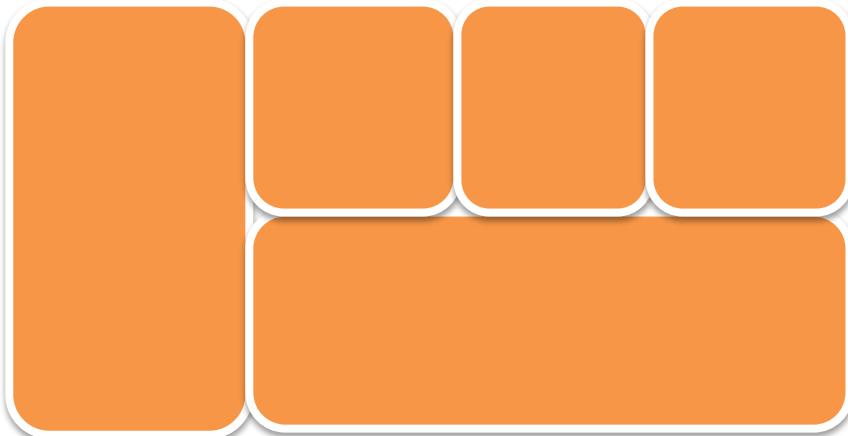
In the late 1990's it was decided to introduce competition in the electricity market to help give customers choice in who supplied their electricity it also meant that prices were driven down. All the local electricity suppliers could now provide power out their "home" area.

To support this change in how customers are supplied the country's 14 public electricity supply areas where changed to distribution areas and referred to by a two digit code called a PES or distributor ID. All customers in that supply area would have this two digit number associated with their property. All homes in the West Midlands are under code 14. This would then help with pricing and power outages.

Because of the industry changing, new processes had to be put in place to support and protect customers when switching supplier. Each property was then allocated with a Meter Point Administration Number, this would be the address of the Supply Point and be a unique 13 digit number, and the first two digits would be the PES ID.

Each distributor had the responsibility of keeping an up to date record of which supplier supplied which property in their area, and also to keep information on what metering equipment is kept on site. This department of the distributor for each area is called MPAS (meter point administration service), all distributors then feed this information into a central database called ECOES).

Activity - Supply Number





INDUSTRY PARTIES

CUSTOMER JOURNEY

Activity – The switching process

How long does switching take?

OBJECTIONS

Objections occur between 2 – 10 days into the registration process.

Objections occur when there is a problem with the previous supplier letting the supply transfer to another supplier.

- ❖ Debt on a customer's account.
- ❖ When the customer has asked their supplier to object on their behalf.
- ❖ When the customer is contracted with the current supplier. (This is usually for SME).

“Why has my old supplier stopped me from transferring to you?” – You will need to contact your old supplier to find out the exact reasons behind the objection, we are aware of the objection however the information is not shared for the reason why.

“Why can't you sort it out?” – We cannot speak to your old supplier on your behalf as this would be a breach of your rights (data protection)

“Why don't you deal directly with my old supplier?” – The objection is between you and your supplier, we cannot resolve anything outstanding between yourself and them.

“The old supplier has no right to stop the transfer, can I make a complaint?” – Yes, you can make a complaint to the old supplier about the situation if you feel that is necessary following your interactions with them. You cannot log the complaint with us.

“I can't resolve the objection with my old supplier, what will happen now?” – The transfer of your supply will stop and you will remain with your old supplier. Once you have resolved the problem with your old supplier you can apply to transfer your supply over to extraenergy again and we can re-start the process.

GAINS DATAFLOWS ELECTRICITY

Day 15 - contact MPAS /XOSERVE asking to take the customers gas / electricity supply, also appoint agents Meter Reading, Meter Operator

AREGI – Request for registration – outgoing flow

We receive a response saying yes to us taking supply we may also receive details with any problem we need to fix before taking supply

S0004 – Response flow will hold details of any problems such as rejections or objections

Day 28 – 30 - The supply starts

S0015 – Meter Technical Information

D0012 – Walk Order

S0003 – Customer Own Reading

D10 – Validated Meter reading

D86 – Change of supplier reading

CREGI - Confirmation of Registration

D19 – Details of Estimated Annual Consumption

S0004 – RESPONSE FLOW

Activity

Rejection Statuses

Status 2: Registration rejected by MPAS: MPAS will not allow the switch of the supply to progress any further. (D0057 is the native flow for MPAS rejection – seen in PFV)

Status 3: Old supplier rejects the change of supplier: There has been an objection by the old supplier – the customer would have 5 days to resolve from this point. - NEED status 10 to be on account after this for the application to proceed. (D0067 is the native flow for an objection)

Status 4: Change of supplier ended by MPAS: The objection was not resolved within 5 days of it being made (D0093 is the native flow for supply switch being ended by MPAS)

Status 10: Objection Removed: The objection was removed by the old supplier – account should now continue on the normal pathway

Status 12: Agent rejects appointment: Lowri beck (Or other agent) have refused to accept the meter point

GAINS DATAFLOWS GAS

Day 15 - contact MPAS /XOSERVE asking to take the customers gas / electricity supply, also appoint agents Meter Reading, Meter Asset Manager

AREGI – Request for registration – outgoing flow

We receive a response saying yes to us taking supply we may also receive details with any problem we need to fix before taking supply

UT004 – Response flow will hold details of any problems such as rejections or objections
MRI – Meter Technical Information

Day 28 – 30 - The supply starts

UT003 – Customer Own Reading
MBR / URN – Change of supplier reading
CREGI - Confirmation of Registration, Details of Annual Quantity



ADVANCED GAINS PROCESS

Application incomplete – This exception is created as the customer has selected an incorrect meter type when on the switching site for example E7. To allow us to take the supply we would need the customer to go back and reapply through the switching site and select the correct meter type.

Credit Check failed – Account plus will trigger a letter to the customer to inform them and advise that we need a security deposit to progress. This is done via bank transfer.

Error in order creation – Domestic: Change the details in the application form and change the status drop down to “ready for import” and save the changes. This may cause the gas and electricity to come out on separate Direct Debits.

Application marked for deletion – NO further action required. These will stay on the system – but the application will not be taken further. Customer would have to reapply through the switching site for the supply if they wish to move to extraenergy in the future.

BACK OFFICE GAINS PROCESS

These are the status' of the registration process – S0004

This is the correct order that status' should be received in account plus. The exceptions can happen at any time during this process. If the exceptions are resolved the account status' should revert back to the original pathway.

There are no exact timelines of when these happen – but they should happen in this order- provided that there are no further issues.

Status 9: Registration Requested: An application for the customers supply has now been sent to MPAS to start the gaining process.

Status 1: Registration Accepted: MPAS have accepted the registration and the process is continuing as it should, with the request being passed to the previous supplier.

Status 11: Agent appointment requested: agent (Lowri Beck) are asked to be the MOP/DC/DA for the meter

Status 13: Awaiting meter details: We are waiting for all the technical meter details to be passed through to us.

Status 14: Awaiting final Flow: This means that the agents are appointed & we have meter details – we are awaiting on final flows such as meter readings.

Status 5: Opening read received – we have all of the information required to start fully supplying the customer

Also receive a CREGI at this point.

BACK OFFICE GAINS PROCESS

These are the ‘drop-out’ status’ that will appear with Account plus. These are all linked to the DTC flows as displayed (D00xx)

Explain what each of the drop out status’ mean:

Status 2: Registration rejected by MPAS: MPAS will not allow the switch of the supply to progress any further. (D0057 is the native flow for MPAS rejection – seen in PFV)

Status 3: Old supplier rejects the change of supplier: There has been an objection by the old supplier – the customer would have 5 days to resolve from this point. - NEED status 10 to be on account after this for the application to proceed. (D0067 is the native flow for an objection)

Status 4: Change of supplier ended by MPAS: The objection was not resolved within 5 days of it being made (D0093 is the native flow for supply switch being ended by MPAS)

Status 10: Objection Removed: The objection was removed by the old supplier – account should now continue on the normal pathway

Status 12: Agent rejects appointment: Lowri beck (Or other agent) have refused to accept the meter point

Now that we know what each status means we will need to look into them further in order to resolve the errors.

Status 2: Open the S0004 to find the reason code for the rejection. This can then be placed into the DTC to find the reason.

Status 3: If the old supplier has objected we will need to inform the customer that there is an objection from their old supplier – they will need to contact their old supplier to get this resolved. It will need to be resolved within 5 days of the objection (5 days from the date of the S0004 being received into account plus.) We can check on ECOES to see the objection – but no further information can be seen. PFV simply explains that there is a rejection but no field for reasons why the objection occurred.

REJECTION CODES FOR REGISTRATIONS

1 Instruction Type Invalid 2 MPAN Core Already Exists 3 MPAN Core Unknown 4 Registration Already Exists 5 Data Aggregator Unknown/No Longer Active 6 Invalid Data Aggregator Appointment Dates 7 Data Collector Unknown/No Longer Active 8 Invalid Data Collector Appointment Dates 9 Meter Operator Unknown/No Longer Active 10 Invalid Meter Operator Appointment Dates 11 Meter Timeswitch Code Unknown 12 Invalid Meter Timeswitch Effective From Dates 13 Meter Measurement Class Unknown 14 Invalid Meter Measurement Class Effective From Dates 15 Meter SSC/Profile Class Unknown 16 Invalid SSC/Profile Class Effective From Dates 17 Energisation Status Unknown 18 Invalid Energisation Status Effective From Dates 19 Invalid Supplier Registration Effective From Dates 20 Supplier Not Registered At Metering Point 21 Supplier Registration is Currently Objected 22 No Registration Exists For Metering Point 23 MPAN is Disconnected 24 Registration After Disconnection Date 25 Only "Old" Supplier Allowed to Raise Objection on This Metering Point 26 Metering Point Has No Objection Currently Held Against It	27 No Change of Supplier Request Has Been Received For This Metering Point 28 Registration Too Soon After Previous 29 Registration Pre-Dates Previous 30 Objection Received After Objection Period Has Expired 31 Profile Class/Standard Settlement Configuration Cannot Exist for HH Meter 32 Future Registration Already Exists 33 Attempted to Energise Metering Point With Incomplete Set of Data 34 Distribution Data Not Supplied 35 Transaction Registration Number and Registration EFD's Are Incorrect 36 Profile Class Unknown 37 Standard Settlement Configuration Unknown 38 Incomplete Instruction 39 Inconsistency Between Measurement Class and DA/DC Type 40 Data Aggregator Type Unknown 41 Data Collector Type Unknown 42 Initial Registration - Not All Required Data Provided 43 Metering Point is Not 1998 Traded 44 Objection Outstanding 45 Supplier Already Registered at Metering Point 46 Invalid Change of Tenancy Indicator 47 Value Provided is the Same as Current 48 Pending Change Already Exists 49 Supplier not a Green Deal Licensee 50 Invalid SMSO Id 51 Effective From Date {SMSO} invalid 52 Invalid IHD Status	53 Effective From Date {IHD} invalid 54 Invalid SMETS Version 55 Invalid DCC Service Flag 56 Effective From Date {DCCF} invalid 57 Invalid UPRN Common reason codes include: 19; 28; 32 Usually this will require some investigation into the application to resolve – ensuring that we have all of the information required to do the gain. 19 – this is caused by us putting in dates that are too early. This would then need to be escalated. To resolve this we will need to XXXXXXXX 28 – to resolve this we will reapply for the supply at a later date (potentially they have just changed supplier – check ecoes to confirm when they recently changed supplier) The customer cannot switch supplier too often. The customer cannot change more often than 28 days after joining a supplier. 32 – There is a registration currently in progress for this meter – this could either be us or it could be another supplier – check ecoes for details of another supplier. This usually happens when the customer attempts to switch to two different companies at the same time e.g. using switching sites. We would need to have a conversation with the customer over who exactly they want to be their supplier – if this is us we would need to reapply for the supply.
---	---	---

REJECTION CODES FOR APPOINTING AGENTS

A	Address appears to be incorrect for Metering Point
B	Address appears to be inconsistent with the Post Code
C	Incorrect Contract Reference - Agent doesn't recognise Contract Number
D	EFD{MOA} / EFD {DCA} / EFSD {DAA} is earlier than EFSD {REGI}
E	Incorrect EFSD {REGI} where the D0155 is an appointment amendment from the existing supplier.
I	Incompatible Measurement Class with class quoted in Agent Supplier Contract
L	Incorrect Service Level Reference
M	Retrieval Method inconsistent with metering installed
N	No Contract
O	Out of Contractual Area
R	Regular Reading Cycle inconsistent with UoS Tariff / metering system installed
S	Incorrect Service Reference
Z	Other Reason(s) for Rejection (see notes)

CHANGE OF TENANCY – MOVING IN

Gas and _____ within the UK are supplied to a _____ rather than to the customer although the customer is able to choose their preferred _____ at any stage. This means when a _____ moves home, we need to _____ a final bill for energy used and obtain _____ of the new _____ for the property.

The information that we will need to capture includes:

Name & _____ details

Opening _____ readings obtained on move in date

The date the customer took _____ for their new property

Payment details i.e. direct debit details

We will need to _____ these details even if the customer is going to change supplier as we will need to send them a _____ for any energy that they use during the _____ period.

customer, produce, information, Electricity, property, supplier, occupant, contact, capture, bill, transition, meter, responsibility,

ERRONEOUS TRANSFER

Why do Erroneous Transfers occur?

- ❖
- ❖
- ❖

What do we need to rectify the situation for the customer?

- ❖
- ❖
- ❖
- ❖

METERING



Fuel:

Type of Meter

Serial Number:

Reading:



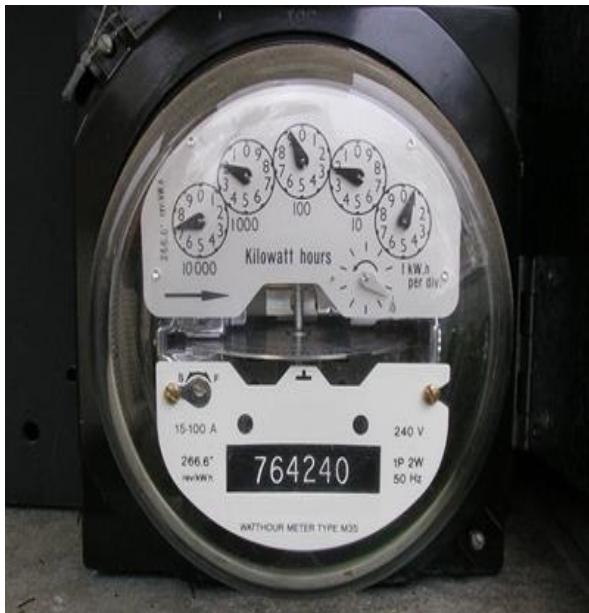
Fuel:

Type of Meter

Serial Number:

Reading:

METERING



Fuel:

Type of Meter

Serial Number:

Reading:



Fuel:

Type of Meter

Serial Number:

Reading:

METERING



Fuel:

Type of Meter

Serial Number:

Reading:



Fuel:

Type of Meter

Serial Number:

Reading:

METERING



Fuel:

Type of Meter

Serial Number:

Reading:



Fuel:

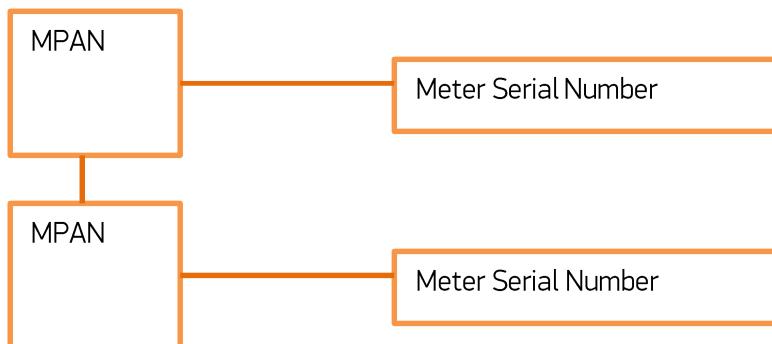
Type of Meter

Serial Number:

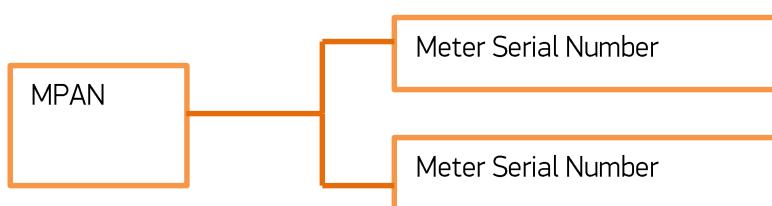
Reading:

METERING

Related meters - 500 – 799 (Top Line)



Associated meters



Smart Meters

- ❖ Smart meters are the most up to date meters available and are in the process of being installed into homes across the UK. For most companies these are still being rolled out on a trial basis, or in small regional areas.
- ❖ The government's aim is that all homes and small businesses will have a smart meter by 2020.
- ❖ Smart meters have the capability to send your meter reading electronically directly to your supplier, removing the requirement for estimated bills.
- ❖ We currently do not support smart meters – although customers that have the meters can move to Extra Energy, they will lose the functionality until we can support this.

BILLS / STATEMENTS

SME Electricity Bill - Page 1

Page no. 1 U

 extraenergy

**Spark Enterprises
Electricity House
Sparkville**

Your electricity bill for 01/08/2014 - 04/09/2014

Account activity

Balance carried forward from previous bill	£0.00
Payments received since your previous bill	£0.00
Credits since your previous bill	£0.00
Debits since your previous bill	£0.00
Balance before charges this period	£0.00

This is a VAT invoice.
VAT registration number: 175662959

Charges for this period

Electricity used	£100.74
Standing charges	£14.19
Non energy charges	£0.00
Climate Change Levy (CCL)	£0.00
Total excluding VAT	£114.93
VAT	£5.75
Total charges this period	£120.68
Total outstanding balance	£120.68

This will be taken from your account on 19/09/2014

Could we also save you money on your home energy bills?

Join thousands of customers already enjoying fantastic savings on their gas and electricity.

Email us at:
switch@extraenergy.com
or call:
0800 953 4774

Could you save more?

Remember - if you have additional gas or electricity meters that we don't currently supply, let us know your renewal dates and we'll call you nearer the time with our best price.

We aim to beat every competitor renewal price by 10%!

Contact us on 08451 400 252.




IE-S46-Cat-004-1

BILLS / STATEMENTS

Activity

SME Electricity Bill - Page 2

Page no. 2		S	06	807	751		
		16	78943623	125			
Supply address: Spark Enterprises, Electric House							
Electricity usage							
Meter serial number	Reading	Previous date	Previous read	Present date	Present read		
A112.000010	Day	01/06/2014	706275	06/06/2014	706354		
A112.000010	Night	01/06/2014	70670	06/06/2014	7250A		
Electricity charges							
Meter serial number	Reading	Charge type	From	To	Units	Price	Total charge
A112.000010	n/a	Standing Charge	01/06/2014	06/06/2014	75 days	40.5p per day	£16.35
A112.000010	Day	Unit Rate	01/06/2014	06/06/2014	325.3 kWh	10.71p per kWh	£34.29
A112.000010	Night	Unit Rate	01/06/2014	06/06/2014	213.3 kWh	5.00p per kWh	£11.65
Climate Change Levy (CCL)							
From	To	Units	Price per unit	Total charge			
VAT							
Rate	Date	Total	Percentage of usage				
1%	06/06/2014	0.75	100%				
Electricity meter readings received							
Meter serial number	Meter register ID	Date	Read	Read type			
A112.000010	01	01/06/2014	70627	E			
A112.000010	01	01/06/2014	70627	E			
A112.000010	02	06/06/2014	7250A	A			
A112.000010	02	06/06/2014	70682	A			

A = Actual read C = Customer read E = Estimated read PC = Price change

Ways to pay

When making a payment, please use your **extraenergy** account number as a reference. Please allow up to five working days for your payment to clear.



DIRECT DEBIT
It's easy, convenient and saves you money. Call us on 08451 400 253 to find out more.



YOUR BANK OR BUILDING SOCIETY
Pay via internet or phone banking, or visit a branch. Simply quote our sort code 30-00-03 and bank account number 1535 and use your **extraenergy** account number as reference.



CALL US
Call us on 08451 400 253 and make a payment using your debit or credit card.

EE-SME-Elec-03-01



BILLS / STATEMENTS

SME Electricity Bill - Page 3

Page no: 3

Supply address: Spark Enterprises, Electricity House

S	06	807	751
	16	5289635	125

Account activity

Payments

Date	Description	Value
------	-------------	-------

Account credits

Date	Description	Value
------	-------------	-------

Account debits

Date	Description	Value
------	-------------	-------

Your next contract

Look out for a renewal contract offer from us at least 90 days before your current contract end date. Remember, if you are a micro-business you have the option to give notice in writing before your last termination notice date. Both of these dates are shown on page one of this invoice.

Extra Energy Supply Ltd. Reg No. 8053154 England
Registered Office: Colmore Place, 20 Colmore Circus, Queen'sway, Birmingham, B16 5AD

EE-SME-Doc-00-01

BILLS / STATEMENTS

SME Electricity Bill - Page 4

How to make energy savings at work



Activate power saving settings on computers



Switch off devices at the end of the day, e.g printers, etc.



Use low energy light bulbs



Switch appliances, from 'standby' to 'off'



Insulate office windows and doors



Install motion sensors to switch off banks of lights

Here to help...

We understand that at times keeping up with your payments can be difficult.

If you find yourself in financial difficulty please contact us free on 0800 953 4777 or 0330 303 4777 and talk to one of our specialist advisors who will work with you to find a solution.

You can also contact the Business Debtline on 0800 197 6026 who provide free, confidential debt advice for people who are self-employed, as well as owners of small businesses.

Please note, we share our payment information with a credit reference agency. Late or missed payments may affect your credit score and your ability to obtain credit in the future.

kWh explained

Your meter readings are converted into kilowatt hours (kWh) and this is what is shown on your bill. A kWh is 1 kilowatt of power used in one hour.

What do you get for a kWh?

(1 kilowatt of power used in one hour)



200 mobile phone charges



4 hours on a computer



10 boiled kettles



8 hours laser printer use



11 coffees from a coffee machine



1 full dishwasher cycle

Contact details

Please write to:

Extra Energy Supply Limited, PO Box 10243, Unit 16
Coalfield Way, Ashby de la Zouch, LE65 9ED

Customer Services:

08451 400 253

Mon-Fri 08:00-20:00, Sat 09:00-17:00

Online:

www.extraenergy.com

Electricity emergency?

Call **0800 195 4141**

Advice?

The Citizens Advice consumer service provides free, confidential and impartial advice on consumer issues. Visit www.adviceguide.org.uk or call the Citizens Advice consumer helpline on **08454 04 05 06**.

Dispute settlement:

If you receive our final response to a complaint and are still unhappy, or eight weeks pass and a complaint is unresolved, you are eligible to contact the Ombudsman Services: Energy. Their contact information can be found at www.ombudsman-services.org

BILLS / STATEMENTS

SME Gas Bill - Page 1

Page no. 1

extraenergy

Spark Enterprises
Electricity House
Sparkville

Your gas bill for 12/08/2014 – 02/09/2014

Account activity

Balance carried forward from previous bill	£0.00
Payments received since your previous bill	£0.00
Credits since your previous bill	£0.00
Debits since your previous bill	£0.00
Balance before charges this period	£0.00

This is a VAT invoice
VAT registration number: 175692959

Charges for this period

Gas used	£12.32
Standing charges	£5.29
Non energy charges	£0.00
Climate Change Levy (CCL)	£0.00
Total excluding VAT	£17.61
VAT	£0.88
Total charges this period	£18.49

Total outstanding balance £18.49

Could we also save you money on your home energy bills?

Join thousands of customers already enjoying fantastic savings on their gas and electricity.

Email us at: switch@extraenergy.com or call: 0800 953 4774

This will be taken from your account on 18/09/2014

Could you save more?

Remember - if you have additional gas or electricity meters that we don't currently supply, let us know your renewal dates and we'll call you nearer the time with our best price.

We aim to beat every competitor renewal price by 10%!

Contact us on 08451 400 252.

EE-SME-Gas-00-01

BILLS / STATEMENTS

SME Gas Bill - Page 2

Page no: 2		MPRN: 1234567890					
Supply address: Lewis Enterprises, Electric House, Sparkville							
Gas usage							
Meter serial number	Previous date	Previous read	Present date	Present read	Units	Rate	
GAS012345678901	02/09/2014	30000.0 C	02/09/2014	30040.0 C	30.00	40.1	
Gas charges							
Meter serial number	Charge type	From	To	Units	Price	Total charge	
GAS012345678901	Standing Charge	02/09/2014	02/09/2014	27 days	26.00 p per day	£5.79	
GAS012345678901	Unit Rate	02/09/2014	02/09/2014	403.1 kWh	2.70 p per kWh	£12.32	
						£17.41	
Climate Change Levy (CCL)							
From	To	Units	Price per unit	Total charge			
VAT							
Rate	Date	Total	Percentage of usage				
5%	08/09/2014	£5.00	100%				
Gas meter readings received							
Meter serial number	Date	Read	Read type				
GAS012345678901	02/09/2014	30000.0	E				
GAS012345678901	02/09/2014	30040.0	C				

A = Actual read C = Customer read E = Estimated read PC = Price change

How to convert the volume of gas registered by your meter into kWh:

1. Subtract the previous meter reading from the current meter reading
2. Multiply the volume of gas used by 2.8077 to convert to cubic metres (m³) required if your meter is metric
3. Multiply this number by the calorific value which is 40.00
4. Multiply this result by the meter correction factor, which is 1.02264
5. Divide the result by 3.6 to convert to the number of kilowatt hours (kWh) used

Ways to pay

When making a payment, please use your **extraenergy** account number as a reference. Please allow up to five working days for your payment to clear.

DIRECT DEBIT
It's easy, convenient and saves you money. Call us on 08451 400 253 to find out more.

YOUR BANK OR BUILDING SOCIETY
Pay via internet or phone banking, or visit a branch. Simply quote our sort code 30-00-03 and bank account number 00120535 and use your **extraenergy** account number as reference.

CALL US
Call us on 08451 400 253 and make a payment using your debit or credit card.

EE-SME-Gas-00-01

BILLS / STATEMENTS

SME Gas Bill - Page 3

Page no: 3
Supply address: Spark Enterprises, Electric House, Sparkville

MPRN: 1234567890

Account activity

Payments

Date	Description	Total

Account credits

Date	Description	Total

Account debits

Date	Description	Total

—

—

—

Your next contract

Look out for a renewal contract offer from us at least 90 days before your current contract end date. Remember, if you are a micro-business you have the option to give notice in writing before your last termination notice date. Both of these dates are shown on page one of this invoice.

Extra Energy Supply Ltd Reg No. 8053154 England
Registered Office: Colmore Plaza, 20 Colmore Circus, Queen's Way, Birmingham, B16 8AT

EE-SME-Gas-03-01

BILLS / STATEMENTS

SME Gas Bill - Page 4

How to make energy savings at work

-  Activate power saving settings on computers
-  Switch off devices at the end of the day, e.g printers, etc.
-  Use low energy light bulbs
-  Switch appliances, from 'standby' to 'off'
-  Insulate office windows and doors
-  Install motion sensors to switch off banks of lights

Here to help...

We understand that at times keeping up with your payments can be difficult.

If you find yourself in financial difficulty please contact us free on 0800 953 4777 or 0330 303 4777 and talk to one of our specialist advisors who will work with you to find a solution.

You can also contact the Business Debtline on 0800 197 6026 who provide free, confidential debt advice for people who are self-employed, as well as owners of small businesses.

Please note, we share our payment information with a credit reference agency. Late or missed payments may affect your credit score and your ability to obtain credit in the future.

kWh explained

Your meter readings are converted into kilowatt hours (kWh) and this is what is shown on your bill. A kWh is 1 kilowatt of power used in one hour.

What do you get for a kWh?

(1 kilowatt of power used in one hour)

-  200 mobile phone charges
-  4 hours on a computer
-  10 boiled kettles
-  8 hours laser printer use
-  11 coffees from a coffee machine
-  1 full dishwasher cycle

Contact details

Please write to:
Extra Energy Supply Limited, PO Box 10243, Unit 16
Coalfield Way, Ashby de la Zouch, LE65 9ED

Customer Services:
08451 400 253
Mon-Fri 08:00-20:00, Sat 09:00-17:00

Online:
www.extraenergy.com

Gas emergency?
Call **0800 111 999**

Advice?

The Citizens Advice consumer service provides free, confidential and impartial advice on consumer issues. Visit www.adviceguide.org.uk or call the Citizens Advice consumer helpline on **08454 04 05 06**.

Dispute settlement:

If you receive our final response to a complaint and are still unhappy, or eight weeks pass and a complaint is unresolved, you are eligible to contact the Ombudsman Services: Energy. Their contact information can be found at www.ombudsman-services.org

© Extra Energy Supply Ltd. Dan No. 08053154. Extra Energy



BILLING INFORMATION

Reading Types

Deemed

Initial

Estimated

Actual

Customer

Final



BILLING FORMULA



PAYMENTS

Reassessment of Direct Debit

What if a DD is returned?

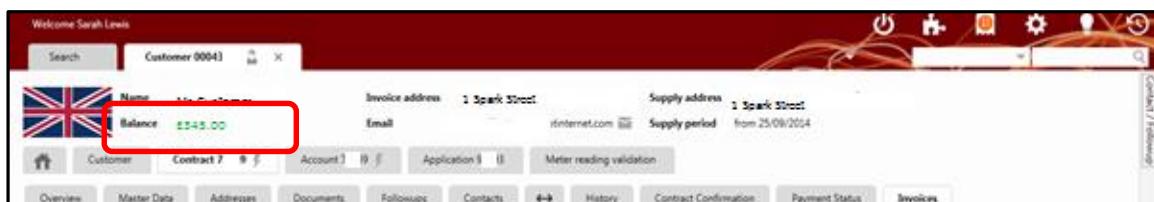
Unpaid, incorrect bank details, stopped at customers request , letter will be sent to the customer advising of ROB pricing and that they will be moved due to DD failure. 1st time fails we do not charge the customer £12.00. 2nd failure incurs a charge of £17.00 and finally £20.00

How is the DD calculated? Estimated Annual Consumption.

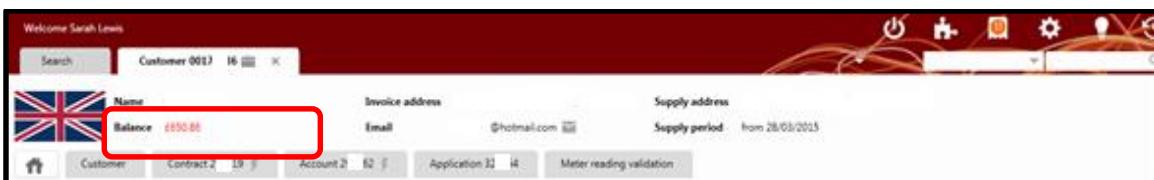
Whenever an adhoc bill is produced the direct debit will be reassessed using the most recent D19 for electricity, or based on the most recent use for the gas. If an adhoc bill is produced the Direct Debit must be checked to ensure that this amount will cover future predicted use as not to put the customer into debt or unnecessary credit.

The payments tab on Account Plus will show the payments as a credit until the account is billed

The screen below shows an account with credit amount showing. This credit is most likely to be an accumulation of direct debit details. This amount will also show on the Online Portal, some customers believe this is money owed back to them. The customer will pay the same amount each month on a domestic tariff that evens out through summer and winter use. Therefore it will show as credit until the customer has been billed for the full 12 month term when it will show either a genuine credit or outstanding amount. Because we base the Direct Debit on the Estimated Annual Consumption as long as the customer is providing readings regularly this amount should be accurate.



Where a debit is showing this could be that where the account has gone through the winter months where usage is higher. Once the account has gone through the full 12 month period this should reduce down to a nominal amount, if any, as long as the customer has been providing regular readings to help us calculate the Direct Debit and their use.



DD REASSESSMENT

When an account has come onto supply with Extra Energy, the Direct Debit is set based on the EAC / AQ that the customer provided at the point of sale. Once the customer has come onto supply we received information from the industry in the form of a CREGI that gives us their “official EAC / AQ” the direct debit then can be amended by us to reflect their predicted use.

Once the customer has been on supply for 6 months then a “mid-term” direct debit reassessment should take place. This is to ensure that the customer isn’t paying either too much or too little each month. At this point the Direct Debit may be increased or decreased dependent on usage. No refunds should take place at this point.

When the customers initial contract comes to an end there will be an “annual reassessment” completed. Any amount in credit at this point can be refunded to the customer.

When and why would a customer prompt for a reassessment of the Direct Debit?

- ❖ They think the Direct Debit is too high/low
- ❖ Customer circumstances have changed.
- ❖ They are managing their finances and want to increase/decrease or reconfirm their payment to EE as being as accurate as possible
- ❖ Customer is in financial hardship and is indicating this over the phone – consider talking about debt processes.
- ❖ Customer thinks that they are due a refund of funds and is prompted into a Direct Debit reassessment
- ❖ Customer preference to have their Direct Debit reassessed more regularly than the standard EE process
- ❖ A high bill (possible accurate meter read) has prompted the customer to have their Direct Debit reassessed as they are not paying enough on a monthly basis to cover

REFUNDS

At the annual reassessment of a Direct Debit we may find that the customer is in credit to us.

If this is the case there are two possible options for us to take:

1. Less than £70 credit – no refund will be provided, but the Direct Debit will take the credit into consideration when the reassessment of the amount takes place
2. More than £70 credit – refund will be provided to the customer and the account balance is brought back to £0. The reassessment doesn’t take any credit into account.

For any refund a request form has to be completed.

Any Change of Supply final bill validated and released will require a refund request to be completed to ensure the customer doesn’t have to call in to request the refund.

Any Change of Tenancy final bill with no forwarding address, do not automatically request refund.

ANY BILL WHICH CREATES A CREDIT TO AN ESTIMATED READING DOES NOT GET A REFUND.



INDEMNITY CLAIMS

Under the Direct Debit Scheme Rules paying banks are required to refund the payer in the event of an error. If the error is made by a service user, paying banks will use the **indemnity claim** process to reclaim the refund from that service user.

When a customer has gone through an indemnity claim this will show on their next invoice. There will be two entries one for the original direct debit and one for the credit from the indemnity claim.



CALL STRUCTURE

As part of your role within billing you will be expected to mitigate with the customer where they have received a high bill, or there has been an increase / decrease in the customer's direct debit.

When contacting a customer the preferred method is always a telephone call this is because this is the quickest way to ensure the customer has received the information.

Intro

Data Protection

Subject

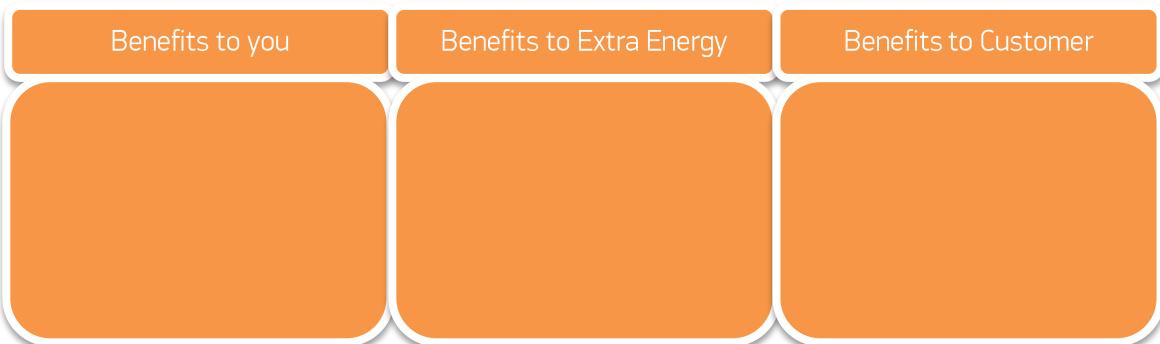
Rectify

Professionally close the call. "*Is there anything else I can help you with today, thank you for calling extraenergy*".

TELEPHONE COMMUNICATIONS

We all create an image of ourselves by choice or ignorance. As a company we have an image to portray. Image, behaviour and an excellent standard of performance should create an impression that will tell people that they are dealing with a professional company.

Building Rapport – People buy people first



How do we develop customer relationships?

What tools do we have available?

THE POWER OF COMMUNICATION

Listening Skills – Activity



We hear all the time. Our ears are constantly battered from noises from air-conditioning to the background buzz of a call centre. However we don't always react to these sounds.

It is important to remember that hearing is not listening. Hearing is one of the five basic senses and only part of listening.

- ❖ **Listening** is a complex procedure that involves concentration, interpretation, and understanding. Listening can be broken down into:
- ❖ **Hearing** In itself does not require a high amount of effort. However situations can arise when there is a lot of background noise or if we are speaking with a softly spoken customer on the telephone.
- ❖ **Attention** - we have to learn to give our undivided attention to someone if we really want to get to grips with what is being said. Paying attention can be challenging, especially if we are dealing with familiar situations. Attention requires concentration and effort; it means picking up on everything that is being said to us.
- ❖ **Understanding** - finally we have to understand what we hear and that means analysing and thinking. We have to think about what and how it is being said in order to decide how to use the information to build our response.

AGGRESSIVE / ASSERTIVE / PASSIVE

What is your natural style?

How can I be more assertive?

THE POWER OF COMMUNICATION

Excellent Customer Service

Bad Customer Service

Use Open questions to open a conversation to gain more information and closed questions when you need to direct a conversation.

*I keep six honest serving men
(They taught me all I knew);
Their names are What and Why and When
And How and Where and Who.*

Rudyard Kipling

SME CUSTOMERS

Scenario One

You call through to the customer as you need to speak to them to help clarify some points on the account. Because you are calling through to a business you can only get through to the person who has answered the phone, the only person you can speak to is he decision maker who is unavailable, what are you going to do?



Scenario Two

You call through to the customer as you need to speak to them to help clarify some points on the account. You get through to the decision maker however they are unable to answer your queries as they don't have any information with them to hand and cannot provide a meter reading, and have stated they pay us we can send a reader out. What are you going to do?



Scenario Three

You call through to the customer they are not available but they give a time for you to call back. You call back at the time requested and get through to the decision maker, however when discussing the account it becomes apparent that the customer cannot really give you the information over the phone as they sound distracted. What action would you take next?



DEALING WITH CHALLENGING CUSTOMERS

Notes:



Don't promise what you can't deliver. Be honest and realistic when telling the customer what you will do.

DEALING WITH CHALLENGING CUSTOMERS

Assertive Communication Techniques

There are a variety of ways to communicate assertively. By understanding how to be assertive, you can quickly adapt these techniques to any situation you are facing.

I Statements

Use “I want,” “I need”, or “I feel” to convey basic assertions.

e.g. I feel strongly that we need to bring in a third party to mediate this disagreement

Empathic Assertion

First, recognize how the other person views the situation:

I understand you are having trouble working with Arlene.

Then express what you need:

...however, this project needs to be completed by Friday. Lets all sit down and come up with a plan to get it done.

Escalating Assertion

This type of assertiveness is necessary when your first attempts are not successful in getting your needs met.

The technique involves getting more and more firm as time goes on. It may end in you telling the person what you will do next if you do not receive satisfaction. Remember though, regardless of the consequences you give, you may not get what you want in the end.

John, this is the third time this week I've had to speak to you about arriving late. If you are late one more time this month, I will activate the disciplinary process.

Ask for More Time

Sometimes, you just need to put off saying anything. You might be too emotional or you might really not know what you want. Be honest and tell the person you need a few minutes to compose your thoughts.

Dave, your request has caught me off guard. I'll get back to you within the half hour.

Change your Verbs

Use “wont” instead of “cant”

Use “want” instead of “need”

Use “choose to” instead of “have to”

Use “could” instead of “should”

DEALING WITH CHALLENGING CUSTOMERS

Customers can be challenging in different ways, some may want you to give them a specific answer which you cannot give, some may not accept what you are telling them. Others may be upset or angry. Below are some tips for dealing with customers who are challenging.

Broken Record

Prepare ahead of time the message you want to convey:

I cannot take on any more projects right now.

During the conversation, keep restarting your message using the same language over and over again. Don't relent. Eventually the person is likely to realize that you really mean what you are saying.

I would like you to work on the Clancy project

I cannot take on any more projects right now.

I'll pay extra for you accommodating me.

I cannot take on any more projects right now.

Seriously, this is really important, my boss insists this gets done.

I cannot take on any more projects right now.

Will you do it as a personal favor?

I'm sorry, I value our past relationship but I simply cannot take on any more projects right now.

Tip:

Be careful with the broken record technique. If you use it to protect yourself from exploitation, that's good. However if you use it to bully someone into taking actions that's against their interests, its manipulative, dishonest and bad.



COMPLAINTS

Notes:

VULNERABLE CUSTOMERS

As part of our license agreement, we have to identify and record if a customer has a vulnerability.

Ofgem's definition of Vulnerable

"Significantly less able than a typical consumer to protect or represent his or her interests in the energy market; and/or

"Significantly more likely than a typical consumer to suffer detriment, or that detriment is likely to be more substantial"

Who is entitled to be on the priority services register.

- ❖ Are of pensionable age
- ❖ Are disabled
- ❖ Are chronically sick

How would you recognize a vulnerable customer?

❖ Clues

- ❖ Children/baby in background
- ❖ Mention of financial difficulty
- ❖ Mention of becoming parents
- ❖ Customer struggling to hear you difficultly with speech
- ❖ You have to repeat the same thing several times/not being understood
- ❖ Language barrier
- ❖ Requests that you speak to 3rd party e.g. please talk to my son
- ❖ Constantly agreeing with you
- ❖ Long silences
- ❖ Customer asking un-related questions
- ❖ Customer requires you to slow down your communication
- ❖ Customer sounds flustered/out of breath – mobility problems
- ❖ Customer tells you that they don't understand



PRIORITY SERVICES REGISTER

Can you record on the system that a customer is vulnerable without their permission?

No, this requires their express permission

What do we offer

- ❖ Braille
- ❖ Audio
- ❖ Large Print
- ❖ Moving your meter free of charge to make it easier for you to access
- ❖ Free quarterly meter readings if you tell your supplier you can't read it yourself
- ❖ Priority reconnection if your supply is interrupted and advance notice if they have to stop your supply
- ❖ Additional protection from bogus callers with a password protection scheme
- ❖ Arranging for your bills to be sent or copied to someone else such as a carer who can help you read and check them
- ❖ Having controls or adaptors provided to make your meter or appliances easier to use

We have to inform the distributor of anyone who needs advanced warning of interruption to their supply, and also if there is a password for entry to their property.

CHANGE OF SUPPLIER, DISPUTED READINGS, READING TOLERANCES

When a customer changes supplier the reading that the old supplier closes the account on must match the reading that the new supplier uses to open the account. To ensure this happens an industry 3rd party will forward these readings onto both parties once it has been validated to be in line with previous consumption. This reading is normally sent from the customer via the new supplier.

Sometimes this reading that has been used is disputed by either the customer or one of the suppliers as it doesn't fall in with readings that they have. The process is managed by back office and is called Disputed Readings.

When we have a disputed reading raised on an account a new reading has to be agreed. However there are certain tolerances that the whole industry has to adhere to.

If the read that we have is within tolerance then it will be accepted by all parties and we cannot dispute.

It is important to reassure the customer that this will be both the starting and finishing reads for both suppliers and that they will not be overcharged for any units that they have used.

- ❖ 250 units of electricity either way
- ❖ 109 units for metric gas
- ❖ 39 units for imperial gas

If over these tolerances we can initiate a disputed reads process.

CHANGE OF TENANCY TOLERANCES

When processing a change of tenancy the reading that the moving out tenant has can differ from the reading the moving in tenant has, this is due to there can be gaps between tenants of rented properties. If this is the case our system will create an occupier account for the gap in readings.

There are no tolerances for change of tenancy readings.

LOSS PROCESS ELECTRICITY AND GAS

Request comes from MPAS (Electricity) or XOSERVE for Gas to Extra Energy

Extra Energy either accept or object to the loss of the supply.

If we accept the loss it will then proceed through the various steps – meaning that we will lose the customer in 28 days for electricity / 30 days for gas from the initial request submission.

Once the customer has moved to their new supplier we need to gain a final meter reading – which we will get from the new supplier. Once this reading has been agreed we can send the customer their final bill and the final DD will be amended to collect all outstanding money.

3. If we decide to object we will need to send the objection to MPAS within 1 day, XOSERVE within 1 day.
4. MPAS/XOSERVE also have to accept the objection.
6. Customers can contact us to pay any outstanding fees or to discuss the reasons behind the objection. Once we are satisfied that the customer has met all the terms, we will then need to remove the objection.

If the 1 day target is not met – the loss will not be processed and customer will remain with Extra Energy.

7. MPAS/XOSERVE also need to confirm that the objection has been removed or the loss process is stopped.
8. The loss now processes through the system and the customer will move to their new supplier in 28 days for elec 30 days for gas from the initial request submission.
9. Once the customer has moved to their new supplier we need to gain a final meter reading – which we will get from the new supplier. Once this reading has been agreed we can send the customer their final bill and the final DD will be amended to collect all outstanding money.
10. We can object to the loss of an account, however XOSERVE can reject our objection.
11. If this happens, we can choose to object a further 2 times either with the same reason or with a different one. The same motions need to be followed with XOSERVE accepting and rejecting the objection.
12. On each occasion the 1 day timer for the objection starts once XOSERVE have accepted.

LOSS PROCESS ELECTRICITY AND GAS

When a customer chooses to leave us, once the gains process is initialized with the new supplier we will be notified via MPAS / Xoserve we will receive this via an S0004, with a status numbered as below. This status will tell you at what stage of the loss journey.

Status 6	Status 7	Status 8
•Loss Notification Received	•Objection against loss raised	•Loss Objection upheld – registration retained
Status 15	Status 16	Status 17
•Objection to loss accepted	•Objection to loss rejected	•Request removal of objection
Status 18	Status 19	Status 20
•Objection removal rejected	•Objection removal accepted	•Loss confirmed

EAC / AQ

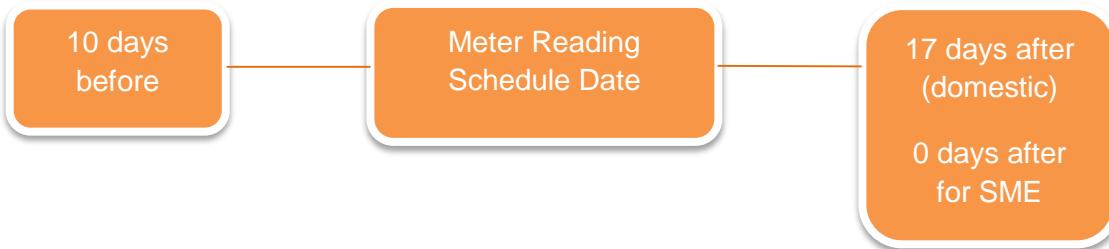
The EAC is calculated on our behalf by the Data Aggregator (Lowri Beck), this is sent to us on a D19 flow after every meter reading is submitted by us from the customer or from the meter reader, therefore the most recent D19 in Account Plus. The gas is only updated once a year by XOSERVE, you will find this in the CREGI.

PURCHASING

Purchasing in Extra Energy is completed by our Purchasing Team, within that team they will use the EAC / AQ for all of our customers. For electricity we buy in half hourly periods for gas we can purchase and store well in advance. However we need to estimate the best we can to ensure that we don't lose money, as gas and electricity is volatile the price goes up and down. We would not want to buy at a peak price and then be unable to sell it on. Later in the journey our Settlements Team would analyse what we contracted to generate or buy based on our EAC's / AQ's and based on meter readings what we sold on. Here is where there can be gaps of difference, they are known in the industry as settlement gaps. The bottom-line is if there are gaps we lose money. If there are gaps all the time this then flags exceptions to Elexon who will investigate.

So to link it to your role on a day to day basis, if the customer's bill is incorrect it will affect our bottom line.

BILLING WINDOW



Practise 1a

SME Customer contract QVDD

SSD 04/01/2014

MRSD 02/02/2014

Ask: When should this customer have received their first bill?

Answer:

Practise 1b

SME Customer contract QVDD

SSD 06/03/2015

MRSD 12/06/2015

Ask: When should this customer have received their first bill?

Answer:

BILLING WINDOW

Practise 2

SME Customer contract MDD

SSD 04/01/2014

MRSD 28/04/2014

Ask: When should this customer have received their first bill?

Answer:

Practise 3a

Domestic Customer MDD

SSD 04/01/2014

MRSD 13/02/2014

Ask: When should this customer have received their first bill?

Answer:

Practise 3b

Domestic Customer MDD

SSD 07/02/2015

MRSD 03/04/2015

Ask: When should this customer have received their first bill?

Answer:

EXCEPTIONS

Activity - In pairs from your experience can you name some of the reasons an account may be recognised as an account that needs to be checked

ACCOUNT FIX

An account fix is where we cannot resolve the account issue with the normal process and we have to get a specialist team involved to fix the account. A typical account fix looks like the below:

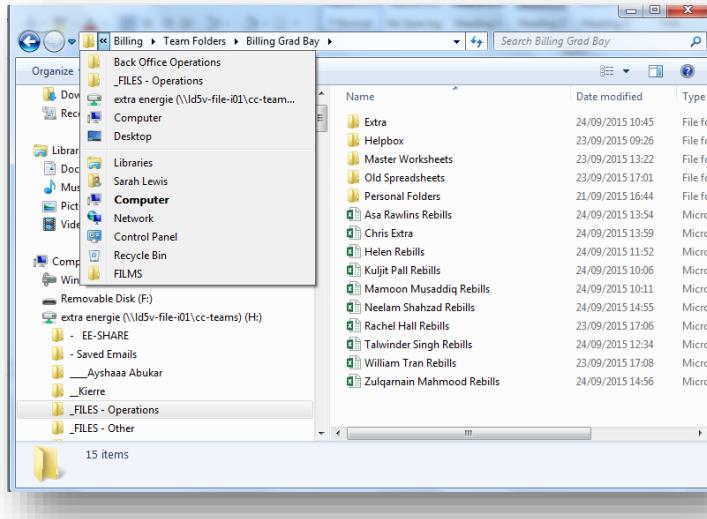
Account Fix Form			
Raised By:	Agent Name	Date Raised:	29/10/2015
Checked By:	SA / QA /TM	Customer Type	SME
Customer Number:		Contract Number	
MPRN/MPAN:	MPAN -	Defect Number(if Known)	n/a
Description:			
EXAMPLE Incorrect COT We need to undo the COT from account no. <u> </u> to account no. <u> </u> . Customer COT was done from business to business account when it should've been done business to domestic account. Reason why COT was done initially: Customer had ceased all responsibility as a commercial site and is now fully operational purely a domestic site. – Evidence to approve this change are logged on account plus.			

DEFECTS

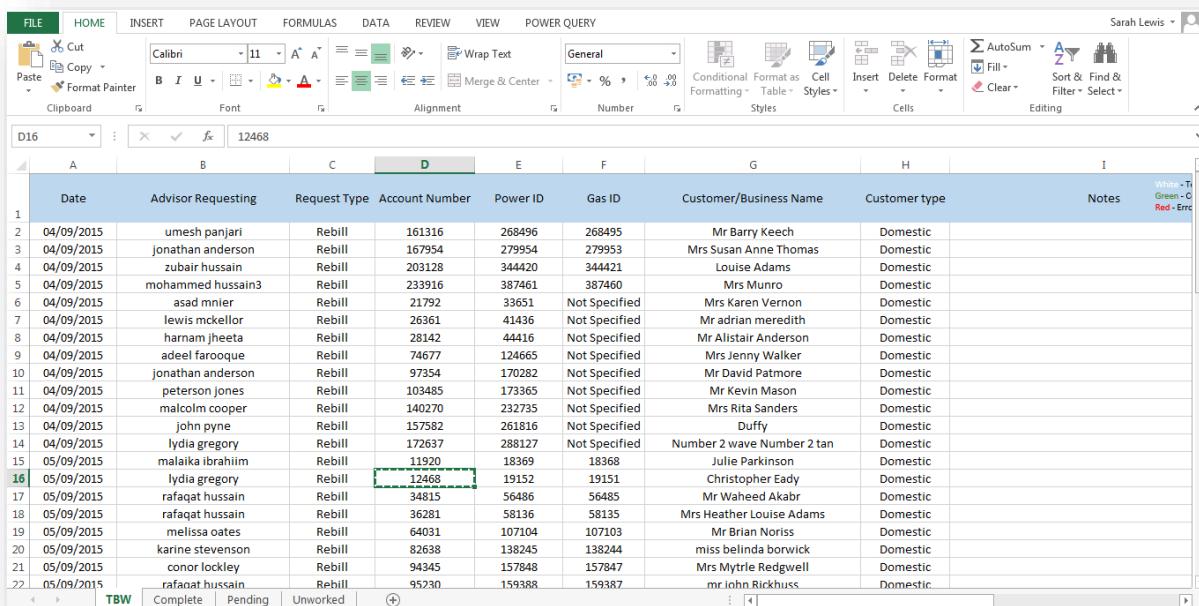
A defect is something that occurs in the system that shouldn't i.e. an exit fee appears on a bill even though the customer is out of a fixed term contract. Another example would be where all of the relevant dataflows are showing on the customers account, however when we are trying to bill we get an error code stating that there is no start reading, this is a problem with the system where it doesn't recognise

HOW TO REBILL

There is a spreadsheet with work on for each person within _FILES_Operations > Back Office Operations > Billing > Team Folders > then you would select your team name and then your name



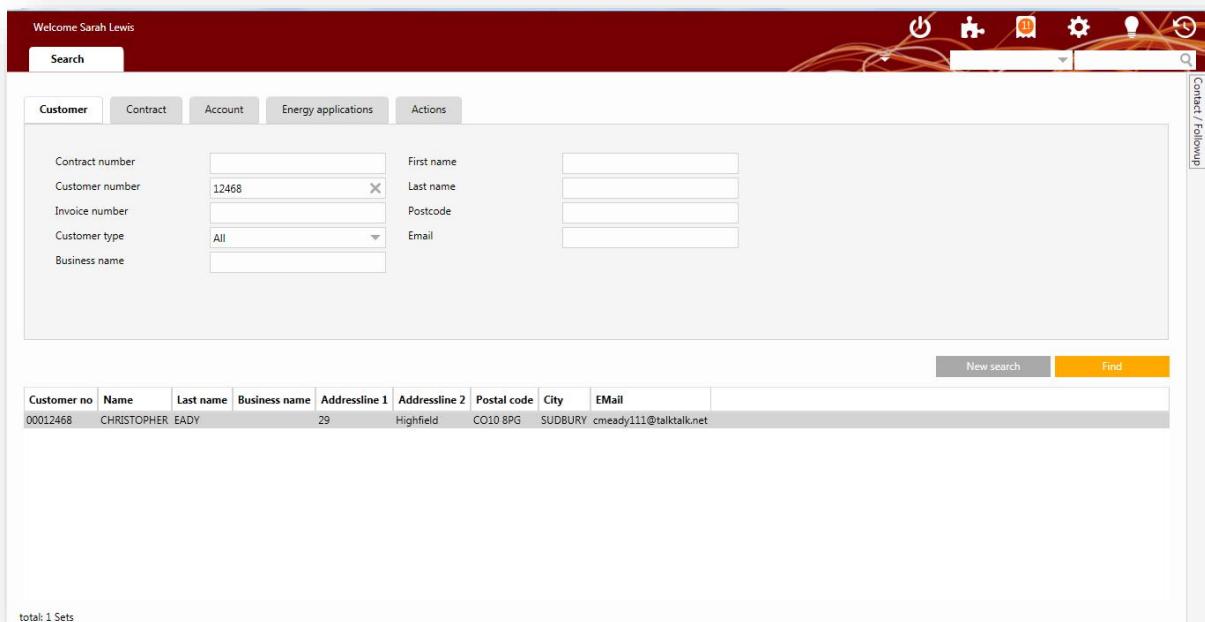
Double click on your spreadsheet to open your work.



	Date	Advisor Requesting	Request Type	Account Number	Power ID	Gas ID	Customer/Business Name	Customer type	Notes
1									
2	04/09/2015	umesh panjari	Rebill	161316	268496	268495	Mr Barry Keech	Domestic	
3	04/09/2015	jonathan anderson	Rebill	167954	279954	279953	Mrs Susan Anne Thomas	Domestic	
4	04/09/2015	zubair hussain	Rebill	203128	344420	344421	Louise Adams	Domestic	
5	04/09/2015	mohammed hussain3	Rebill	233916	387461	387460	Mrs Munro	Domestic	
6	04/09/2015	asad mnier	Rebill	21792	33651	Not Specified	Mrs Karen Vernon	Domestic	
7	04/09/2015	lewis mckellar	Rebill	26361	41436	Not Specified	Mr adrian meredith	Domestic	
8	04/09/2015	harnam jheeta	Rebill	28142	44416	Not Specified	Mr Alistair Anderson	Domestic	
9	04/09/2015	adeel faroque	Rebill	74677	124665	Not Specified	Mrs Jenny Walker	Domestic	
10	04/09/2015	jonathan anderson	Rebill	97354	170282	Not Specified	Mr David Patmore	Domestic	
11	04/09/2015	peterson jones	Rebill	103485	173365	Not Specified	Mr Kevin Mason	Domestic	
12	04/09/2015	malcolm cooper	Rebill	140270	232735	Not Specified	Mrs Rita Sanders	Domestic	
13	04/09/2015	john pyne	Rebill	157582	261816	Not Specified	Duffy	Domestic	
14	04/09/2015	lydia gregory	Rebill	172637	288127	Not Specified	Number 2 wave Number 2 tan	Domestic	
15	05/09/2015	malaika ibrahim	Rebill	11920	18369	18368	Julie Parkinson	Domestic	
16	05/09/2015	lydia gregory	Rebill	12468	19152	19151	Christopher Eady	Domestic	
17	05/09/2015	rafagat hussain	Rebill	34815	56486	56485	Mr Waheed Akabr	Domestic	
18	05/09/2015	rafagat hussain	Rebill	36281	58136	58135	Mrs Heather Louise Adams	Domestic	
19	05/09/2015	melissa oates	Rebill	64031	107104	107103	Mr Brian Noriss	Domestic	
20	05/09/2015	karine stevenson	Rebill	82638	138245	138244	miss belinda borwick	Domestic	
21	05/09/2015	conor lockley	Rebill	94345	157848	157847	Mrs Myrtle Redgwell	Domestic	
22	05/09/2015	rafaat hussain	Rebill	95230	159388	159387	mr John Rickhuss	Domestic	

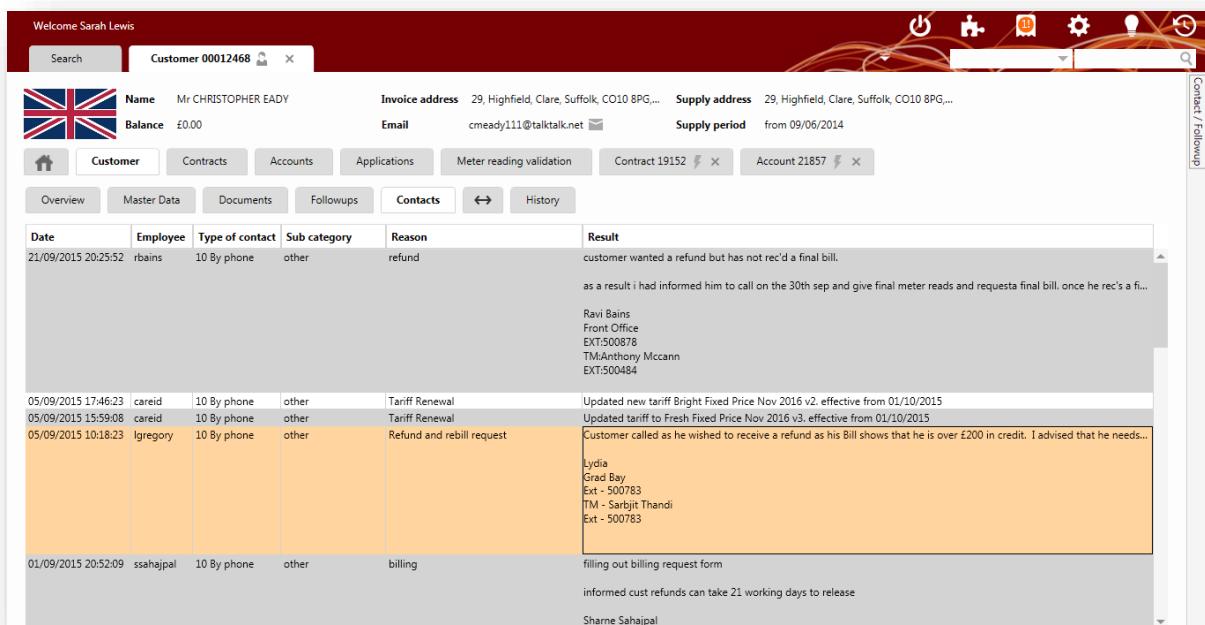
HOW TO REBILL

Copy the customer number into Account plus to search for the customer



The screenshot shows the 'Customer' search interface. The search bar contains '12468'. The results table shows one row for customer '00012468' with details: Name - Mr CHRISTOPHER EADY, Addressline 1 - 29 Highfield, City - SUDBURY, Email - cmeady111@talktalk.net. A note at the bottom left says 'total: 1 Sets'.

As soon as you are in the customer's account in Account Plus, the first check you should make is in the notes, there should be a note for the date of the rebill request on your spreadsheet. This should detail why the customer is requesting a rebill, also you should check the notes to see if there have been any tariff changes, meter changes, change of tenancy or disputed readings raised.

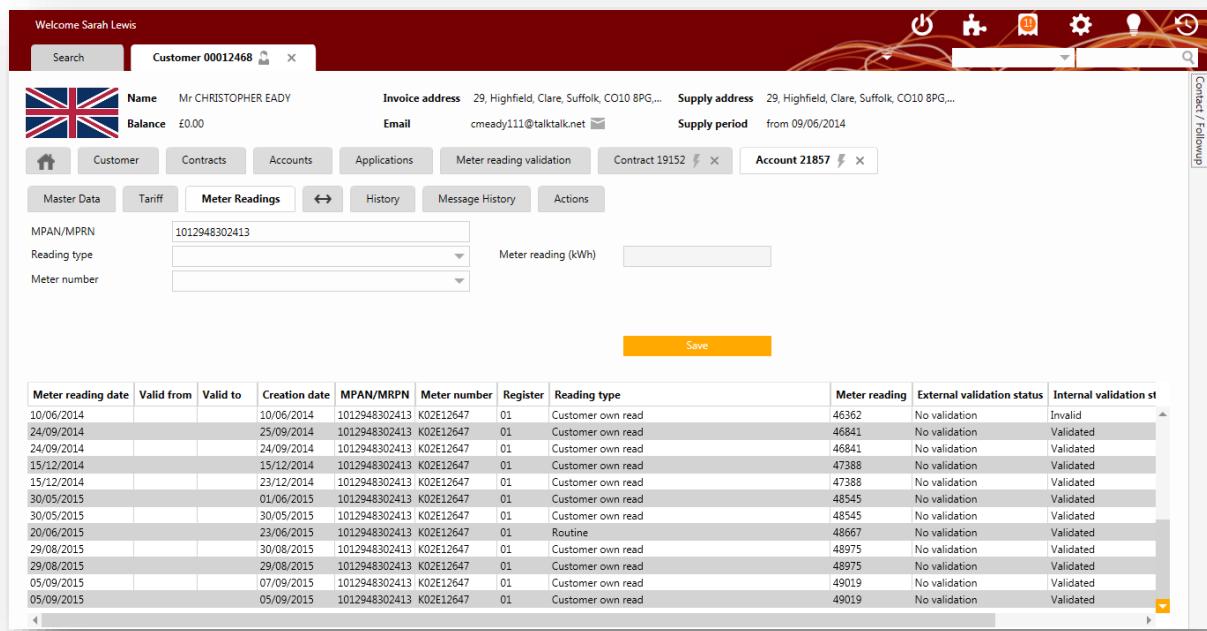


The screenshot shows the customer profile for '00012468'. The 'Notes' section contains several entries:

- 21/09/2015 20:25:52: Ravi Bains, 10 By phone, other, refund: customer wanted a refund but has not rec'd a final bill.
Ravi Bains
Front Office
EXT:500878
TM:Anthony Mccann
EXT:500484
- 05/09/2015 17:46:23: careid, 10 By phone, other, Tariff Renewal: Updated new tariff Bright Fixed Price Nov 2016 v2. effective from 01/10/2015
- 05/09/2015 15:59:08: careid, 10 By phone, other, Tariff Renewal: Updated tariff to Fresh Fixed Price Nov 2016 v3. effective from 01/10/2015
- 05/09/2015 10:18:23: Igregory, 10 By phone, other, Refund and rebill request: Customer called as he wished to receive a refund as his Bill shows that he is over £200 in credit. I advised that he needs...
Lydia
Grad Bay
Ext - 500783
TM - Sarbjit Thandi
Ext - 500783
- 01/09/2015 20:52:09: ssahajpal, 10 By phone, other, billing: filling out billing request form
informed cust refunds can take 21 working days to release
Sharme Sahajpal

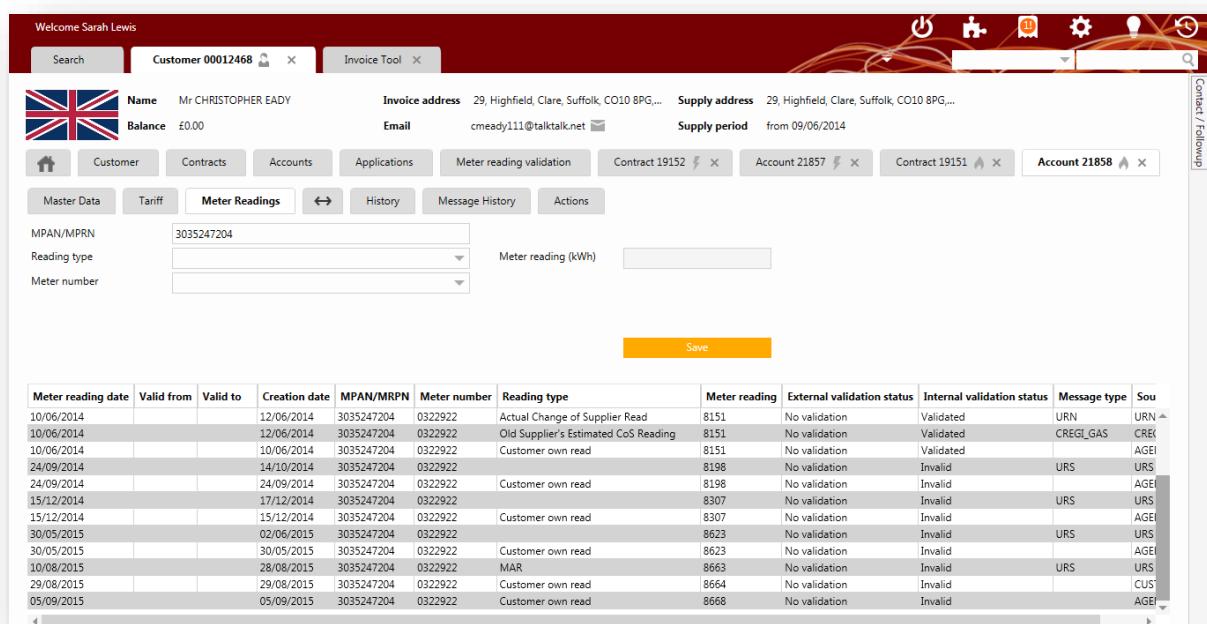
HOW TO REBILL

The next check is to check the meter readings screen, we are checking to ensure we have an up-to-date meter readings so that the rebill is as accurate as possible. Checks should also be made at this point for sporadic readings that do not fall in line with the history of the account, if there are any these will need to be overridden or deleted to ensure the account bills accurately.



Meter reading date	Valid from	Valid to	Creation date	MPAN/MPRN	Meter number	Register	Reading type	Meter reading	External validation status	Internal validation st
10/06/2014			10/06/2014	1012948302413	K02E12647	01	Customer own read	46362	No validation	Invalid
24/09/2014			25/09/2014	1012948302413	K02E12647	01	Customer own read	46841	No validation	Validated
24/09/2014			24/09/2014	1012948302413	K02E12647	01	Customer own read	46841	No validation	Validated
15/12/2014			15/12/2014	1012948302413	K02E12647	01	Customer own read	47388	No validation	Validated
15/12/2014			23/12/2014	1012948302413	K02E12647	01	Customer own read	47388	No validation	Validated
30/05/2015			01/06/2015	1012948302413	K02E12647	01	Customer own read	48545	No validation	Validated
30/05/2015			30/05/2015	1012948302413	K02E12647	01	Customer own read	48545	No validation	Validated
20/06/2015			23/06/2015	1012948302413	K02E12647	01	Routine	48667	No validation	Validated
29/08/2015			30/08/2015	1012948302413	K02E12647	01	Customer own read	48975	No validation	Validated
29/08/2015			29/08/2015	1012948302413	K02E12647	01	Customer own read	48975	No validation	Validated
05/09/2015			07/09/2015	1012948302413	K02E12647	01	Customer own read	49019	No validation	Validated
05/09/2015			05/09/2015	1012948302413	K02E12647	01	Customer own read	49019	No validation	Validated

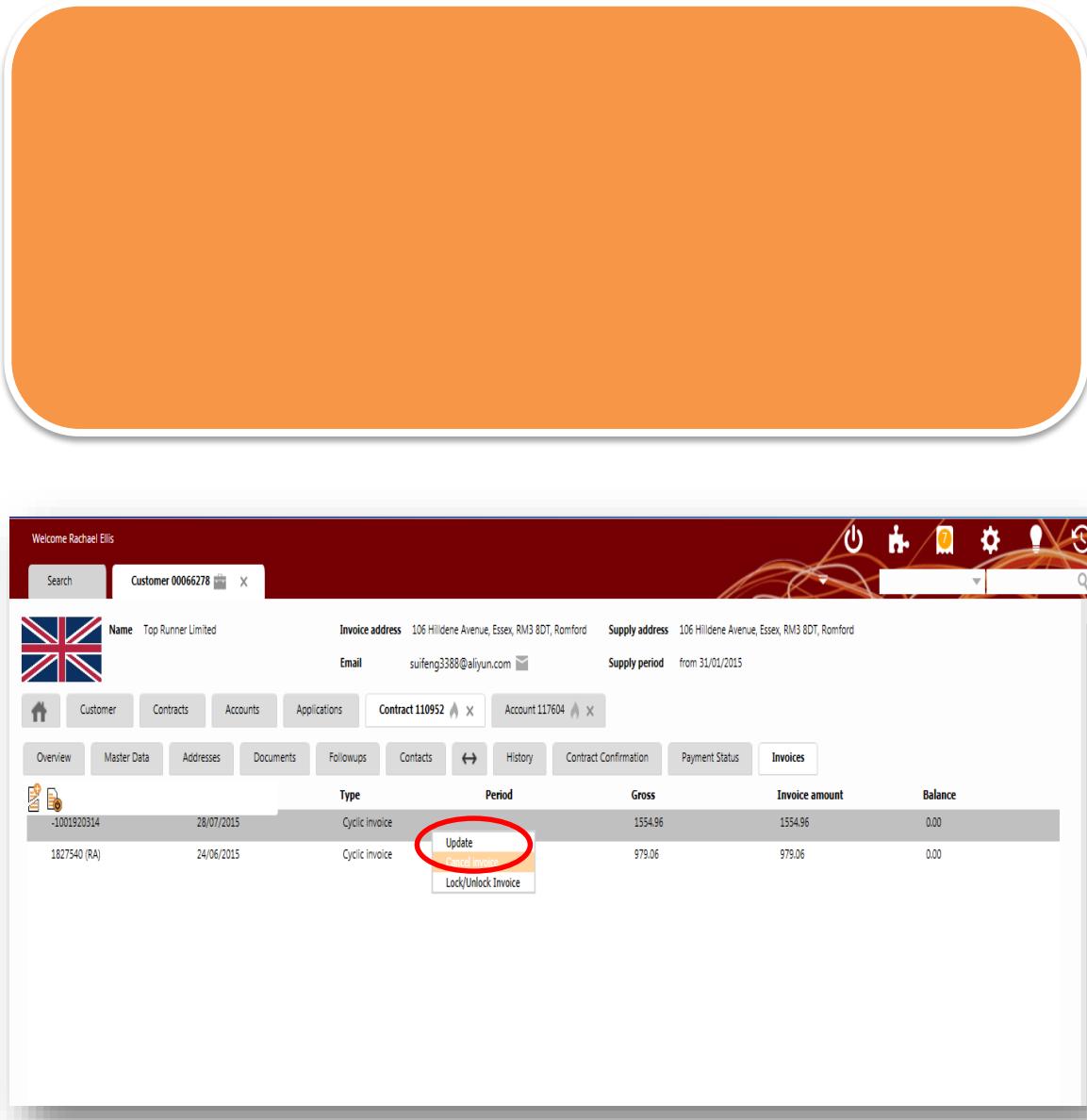
It's also a good check to ensure that the account has the correct opening reading dataflows.



Meter reading date	Valid from	Valid to	Creation date	MPAN/MPRN	Meter number	Reading type	Meter reading	External validation status	Internal validation status	Message type	Sou
10/06/2014			12/06/2014	3035247204	0322922	Actual Change of Supplier Read	8151	No validation	Validated	URN	URN
10/06/2014			12/06/2014	3035247204	0322922	Old Supplier's Estimated CoS Reading	8151	No validation	Validated	CREGI_GAS	CRE
10/06/2014			10/06/2014	3035247204	0322922	Customer own read	8151	No validation	Validated	AGEI	AGE
24/09/2014			14/10/2014	3035247204	0322922		8198	No validation	Invalid	URS	URS
24/09/2014			24/09/2014	3035247204	0322922	Customer own read	8198	No validation	Invalid	AGEI	AGE
15/12/2014			17/12/2014	3035247204	0322922		8307	No validation	Invalid	URS	URS
15/12/2014			15/12/2014	3035247204	0322922	Customer own read	8307	No validation	Invalid	AGEI	AGE
30/05/2015			30/05/2015	3035247204	0322922	Customer own read	8623	No validation	Invalid	URS	URS
10/08/2015			28/08/2015	3035247204	0322922	MAR	8663	No validation	Invalid	URS	URS
29/08/2015			29/08/2015	3035247204	0322922	Customer own read	8664	No validation	Invalid	CUST	CUS
05/09/2015			05/09/2015	3035247204	0322922	Customer own read	8668	No validation	Invalid	AGEI	AGE

ISSUE / DELETE

You may find that you need to cancel a bill so that you can replace it with a new bill. To cancel you click on the invoice and right click then you select delete. YOU MUST ONLY CANCEL / DELETE an invoice as a last resort or if it is incorrect.



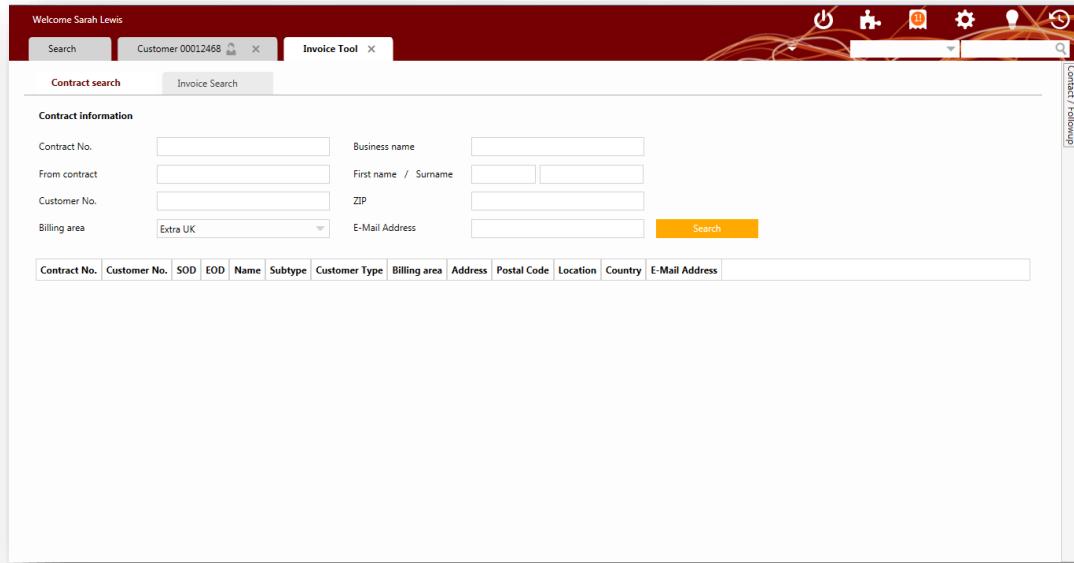
The screenshot shows the extraenergy software interface. At the top, there is a search bar with 'Customer 00066278' and a navigation bar with various icons. Below this, customer details are displayed: Name (Top Runner Limited), Invoice address (106 Hildene Avenue, Essex, RM3 8DT, Romford), Supply address (106 Hildene Avenue, Essex, RM3 8DT, Romford), Email (suifeng3388@aliyun.com), and Supply period (from 31/01/2015). The main navigation tabs include Home, Customer, Contracts, Accounts, Applications, Contract 110952, Account 117604, Overview, Master Data, Addresses, Documents, Followups, Contacts, History, Contract Confirmation, Payment Status, and Invoices. The Invoices tab is selected. A table lists invoices with columns for Type, Period, Gross, Invoice amount, and Balance. The first invoice (ID 1001920314, Type Cyclic invoice, Period 28/07/2015) has a context menu open over it, with the 'Cancel invoice' option highlighted and circled in red. The second invoice (ID 1827540 (RA), Type Cyclic invoice, Period 24/06/2015) is also visible in the table.

Type	Period	Gross	Invoice amount	Balance
Cyclic invoice	28/07/2015	1554.96	1554.96	0.00
Cyclic invoice	24/06/2015	979.06	979.06	0.00

HOW TO REBILL

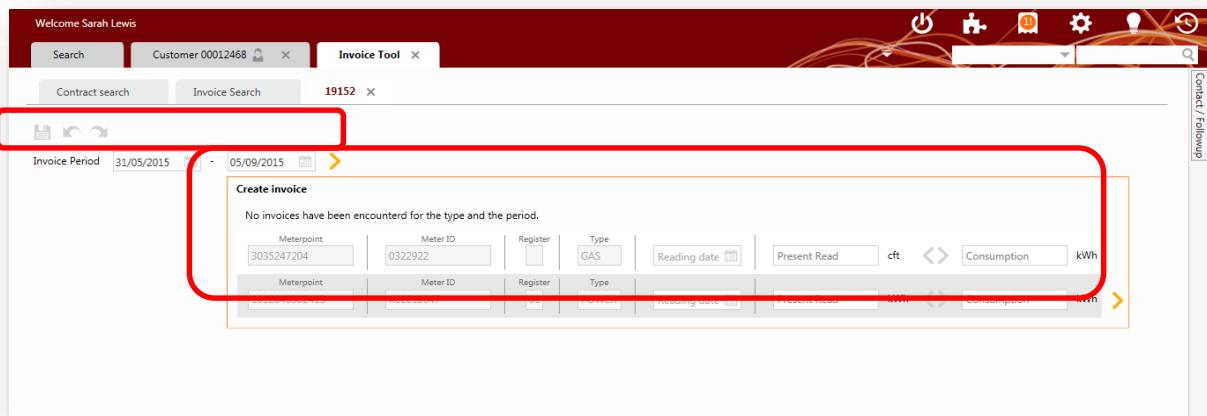
Once you have established that the account should be rebilled, then you need to open the invoice tool. You would do this by selecting the jigsaw piece in the top right hand section of the screen.

The tab below would then show. To continue to produce the bill you would enter the customer number and press enter. You would then select the customer from the returned results towards the middle of the screen.



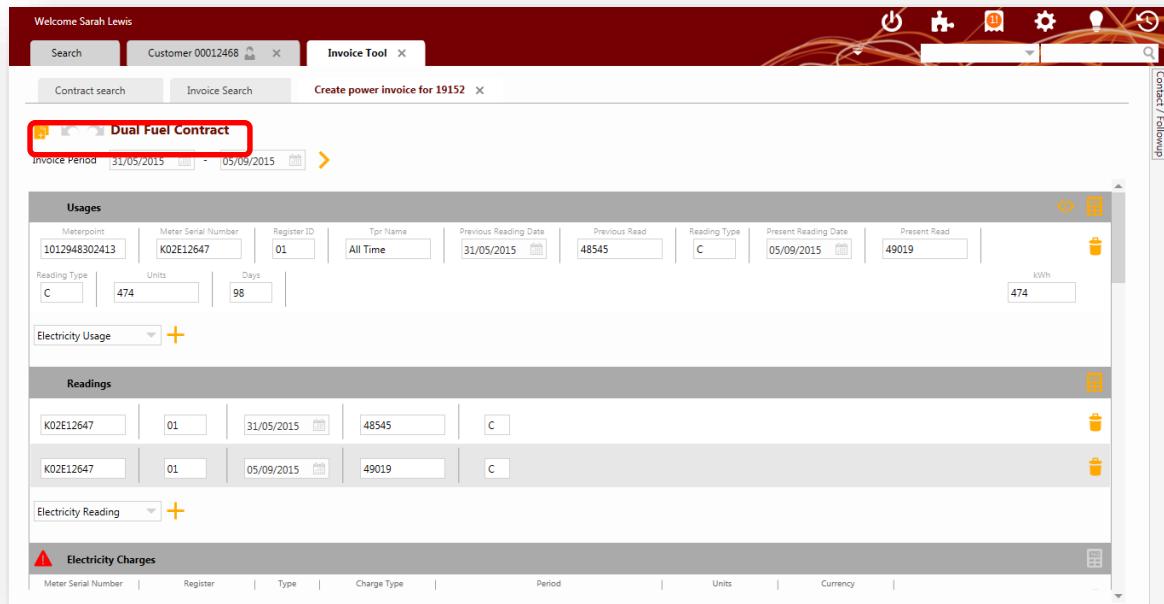
A

subtab will now appear in the date period the start date should be populated automatically. It will either be the start date or it will be the date following the last produced invoice. The to reading date is the date of the reading you wish to use out of Account Plus. If you use a date which doesn't correlate with a reading within Account Plus then the system will bill to an estimated reading using the EAC to produce the estimate. Once the dates are correct you select the yellow arrow to continue, then you get a box which shows no previous invoices have been created or are live for this period that you are trying to bill, you can then select the yellow arrow on the right hand side to continue.

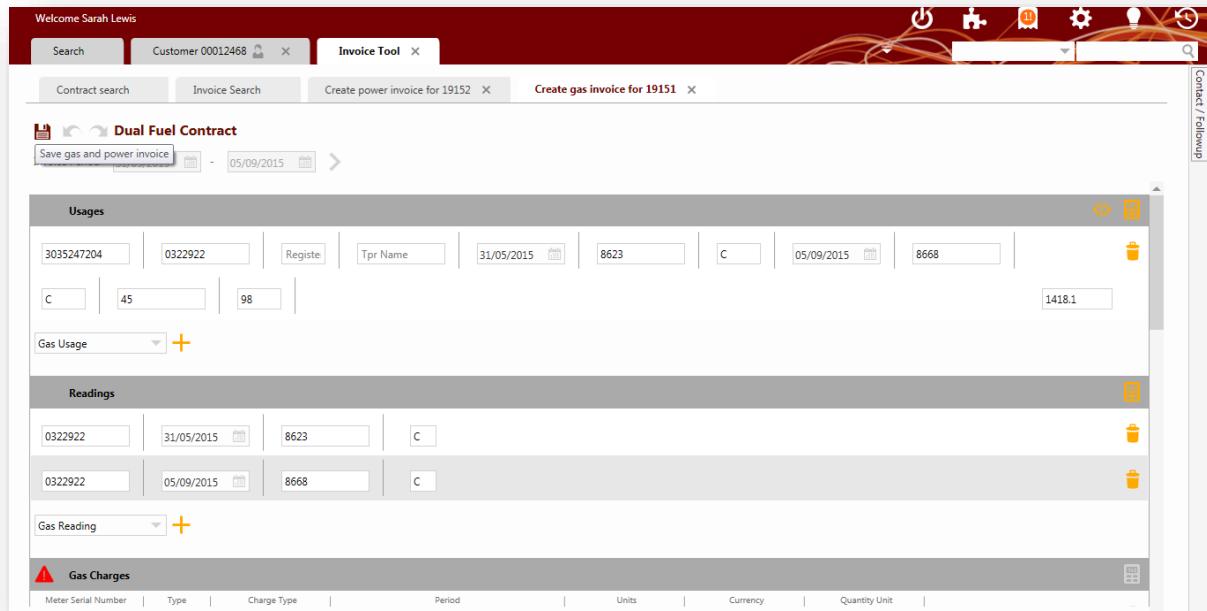


HOW TO REBILL

The page that has been brought up is the electricity information that the system will bill too. Here you need to double check that the information is correct that you wish to bill to. Once you have decided that this is correct, you need to select the yellow button on the left hand side of the screen.

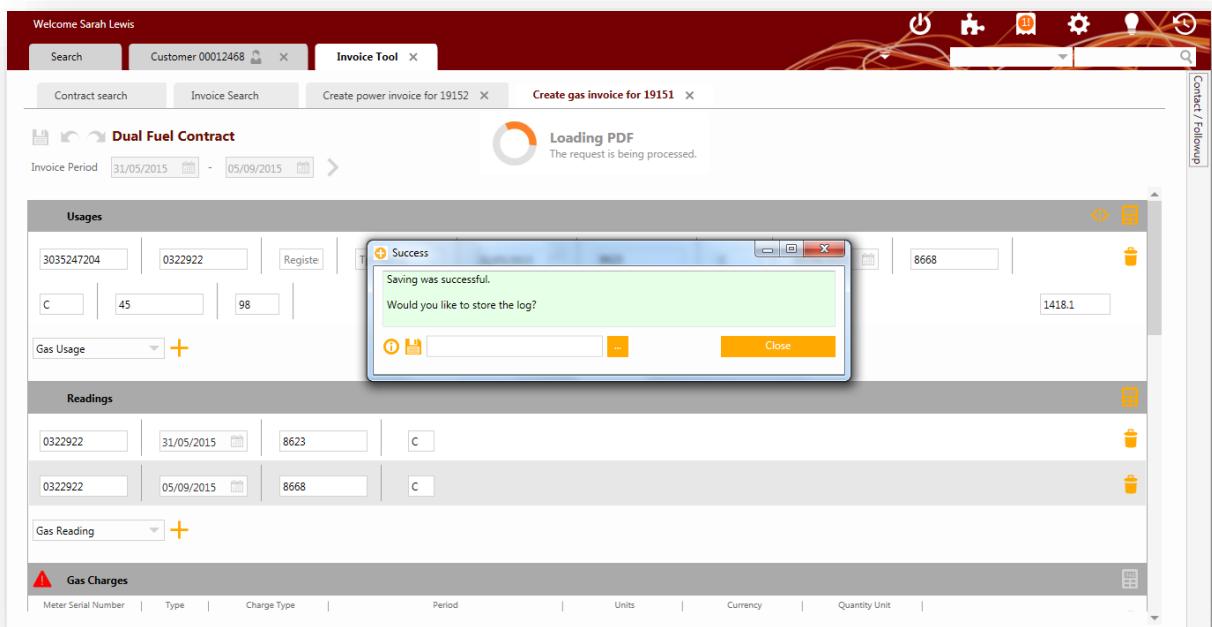


The next screen will be for gas if the account is dual fuel, you will again need to check that what you are billing from and to is correct. Once have determined that the information is correct. Select the save icon on the left hand side of the screen.

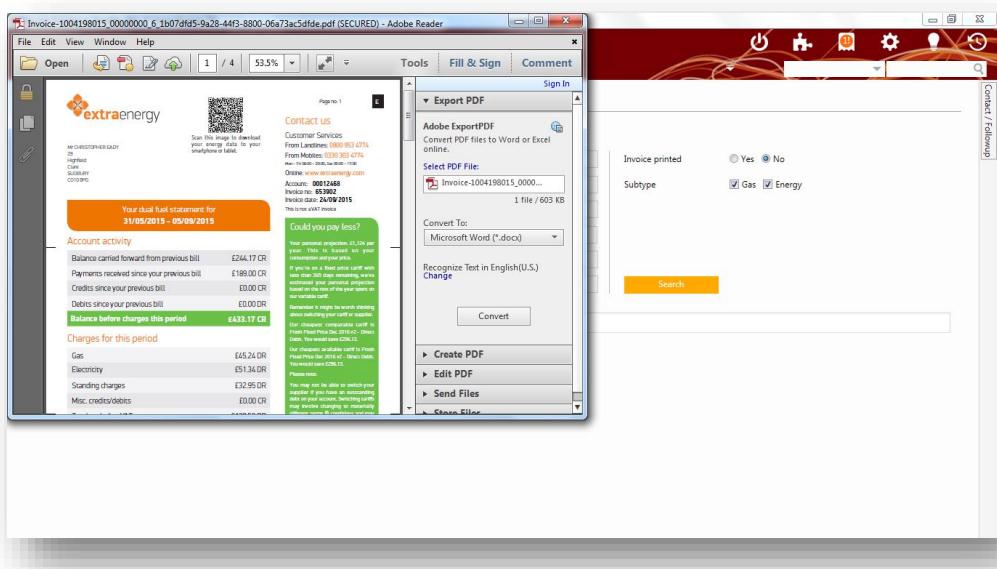


HOW TO REBILL

As long as there are no issues with producing the bill you will see the success box, with a light green box appear. Should this box contain an error initially speak to your Senior Advisor or Team Manager. Then the invoice in PDF format should come up in a separate window.

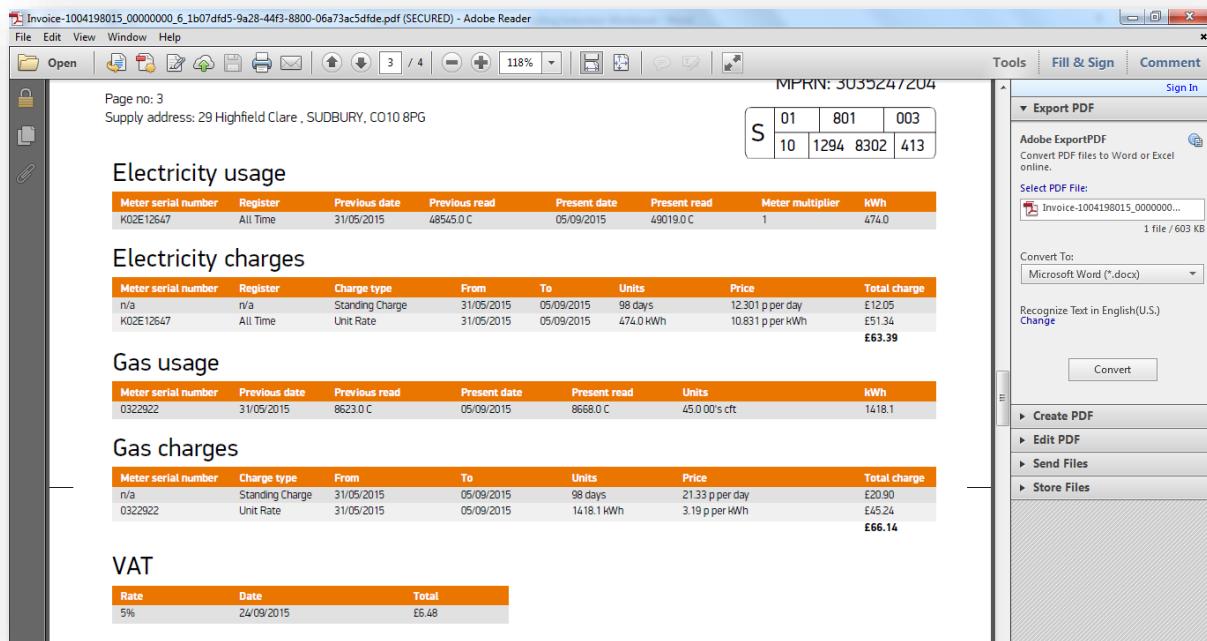


See the screen shot below there is the invoice that you have produced. You will now need to check this bill to ensure the information is correct.



HOW TO REBILL

Check the meter readings are what you had checked in account plus, check the tariff is accurate, check it's the correct customer. You will also need to check the Direct Debit if this is a domestic customer to ensure that there is not a huge increase or decrease which isn't justified.



Electricity usage

Meter serial number	Register	Previous date	Previous read	Present date	Present read	Meter multiplier	kWh
K02E12647	All Time	31/05/2015	48545.0 C	05/09/2015	49019.0 C	1	474.0

Electricity charges

Meter serial number	Register	Charge type	From	To	Units	Price	Total charge
n/a	n/a	Standing Charge	31/05/2015	05/09/2015	98 days	12.301 p per day	£12.05
K02E12647	All Time	Unit Rate	31/05/2015	05/09/2015	474.0 kWh	10.831 p per kWh	£51.34
							£63.39

Gas usage

Meter serial number	Previous date	Previous read	Present date	Present read	Units	kWh
0322922	31/05/2015	8623.0 C	05/09/2015	8668.0 C	45.000's cft	1418.1

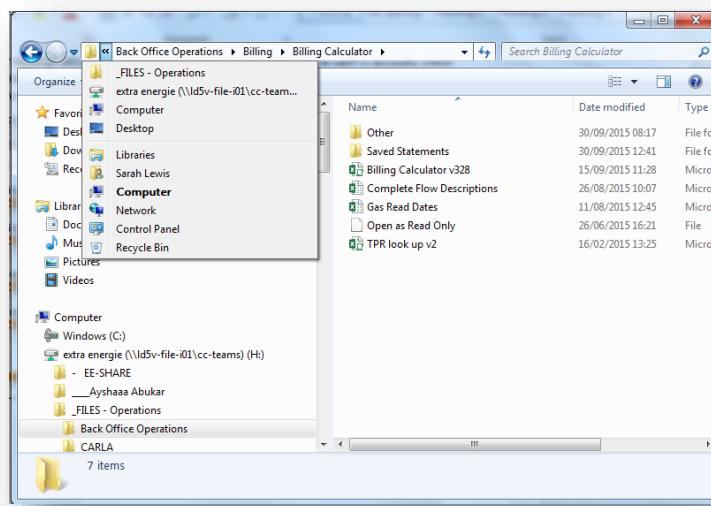
Gas charges

Meter serial number	Charge type	From	To	Units	Price	Total charge	
n/a	Standing Charge	31/05/2015	05/09/2015	98 days	21.33 p per day	£20.90	
0322922	Unit Rate	31/05/2015	05/09/2015	1418.1 kWh	3.19 p per kWh	£45.24	
							£66.14

VAT

Rate	Date	Total
5%	24/09/2015	£6.48

Check this invoice by inputting the same information into the billing calculator. This can be found
 _FILES_Operations > Back Office Operations > Billing > Billing Calculator > Billing Calculator v 328



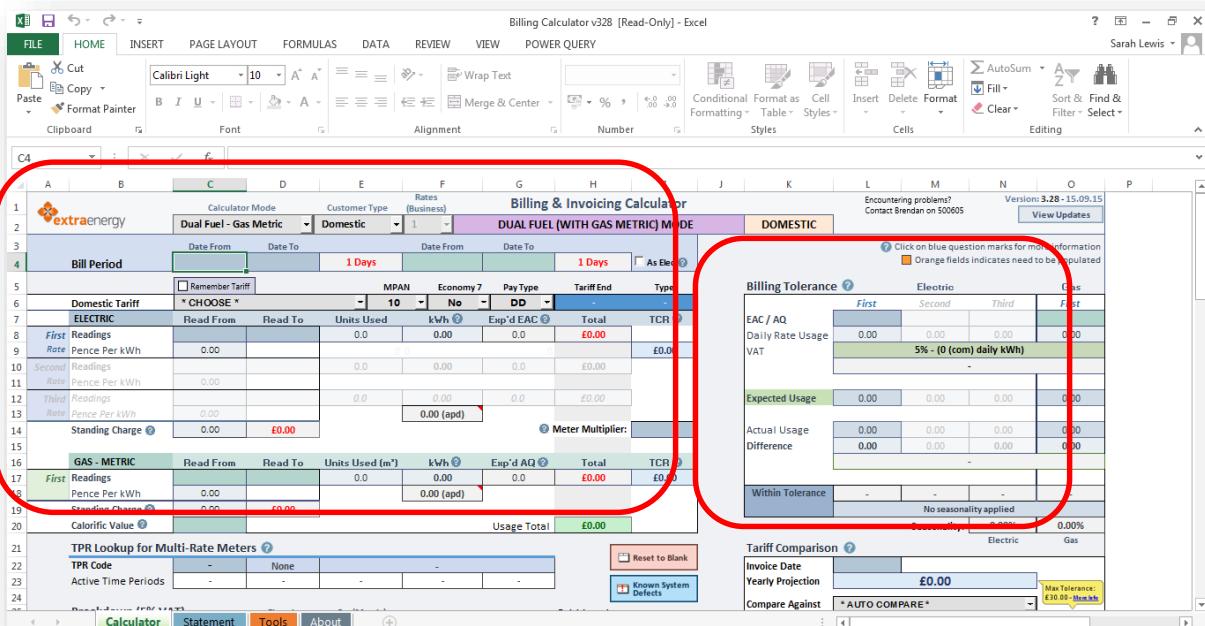
THE BILLING CALCULATOR

The billing calculator needs to be populated with the information out of Account Plus, if you input this with the information out of the bill it will give you exactly the same.

In the left hand side input the following:

- ❖ Calculator Mode
- ❖ Customer Type
- ❖ Bill period
- ❖ Tariff
- ❖ Readings from and to for both fuels.

On the right hand side you need to populate the EAC and AQ so that the calculator can check whether the usage is as expected.



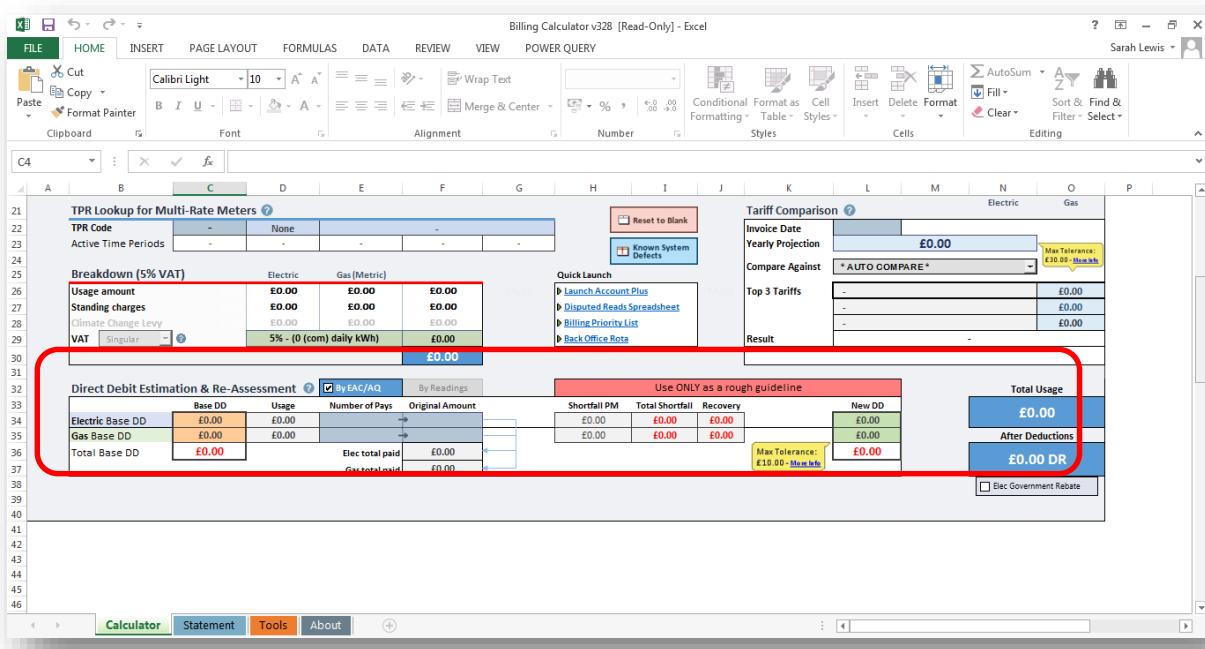
THE BILLING CALCULATOR

The billing calculator will also work out what the Direct Debit should be set at, even taking into account any shortfall in payments.

To complete this part enter how many payments have been made and the amount that has been paid.

e.g. customer has paid 8 payments of £50.00, in Number of Pays = 8 and in Original Amount = £50.00.

Sometimes within payment status you will see that the customers payment amount has changed in that period. If this is the case you will need to add all payments together and divide the amount by the number of payments for ease of adding into the calculator.

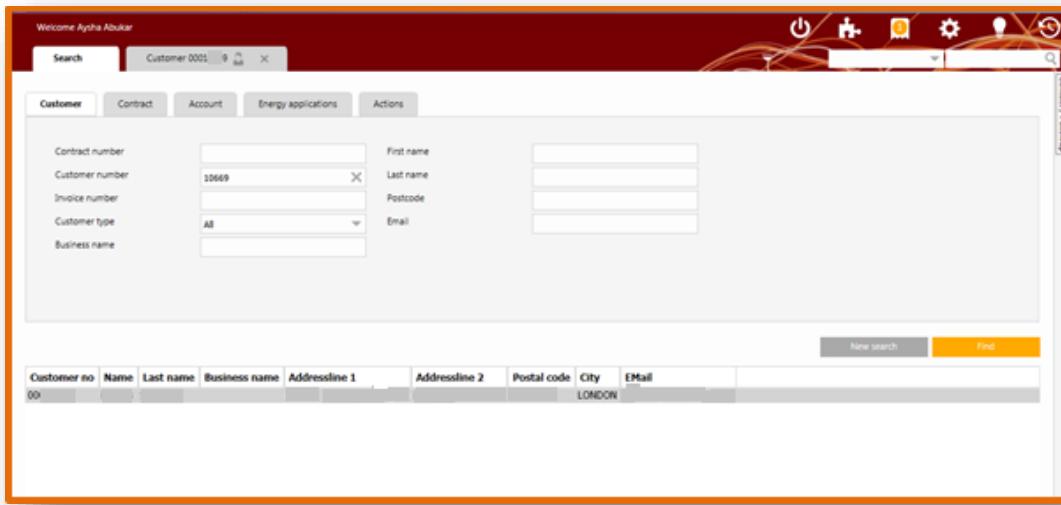


Base DD	Usage	Number of Pays	Original Amount	Shortfall PM	Total Shortfall	Recovery	New DD	Total Usage
Electric Base DD £0.00	£0.00	8	£50.00	£0.00	£0.00	£0.00	£0.00	£0.00
Gas Base DD £0.00	£0.00			£0.00	£0.00	£0.00	£0.00	£0.00
Total Base DD £0.00				£0.00	£0.00	£0.00	£0.00	£0.00 DR

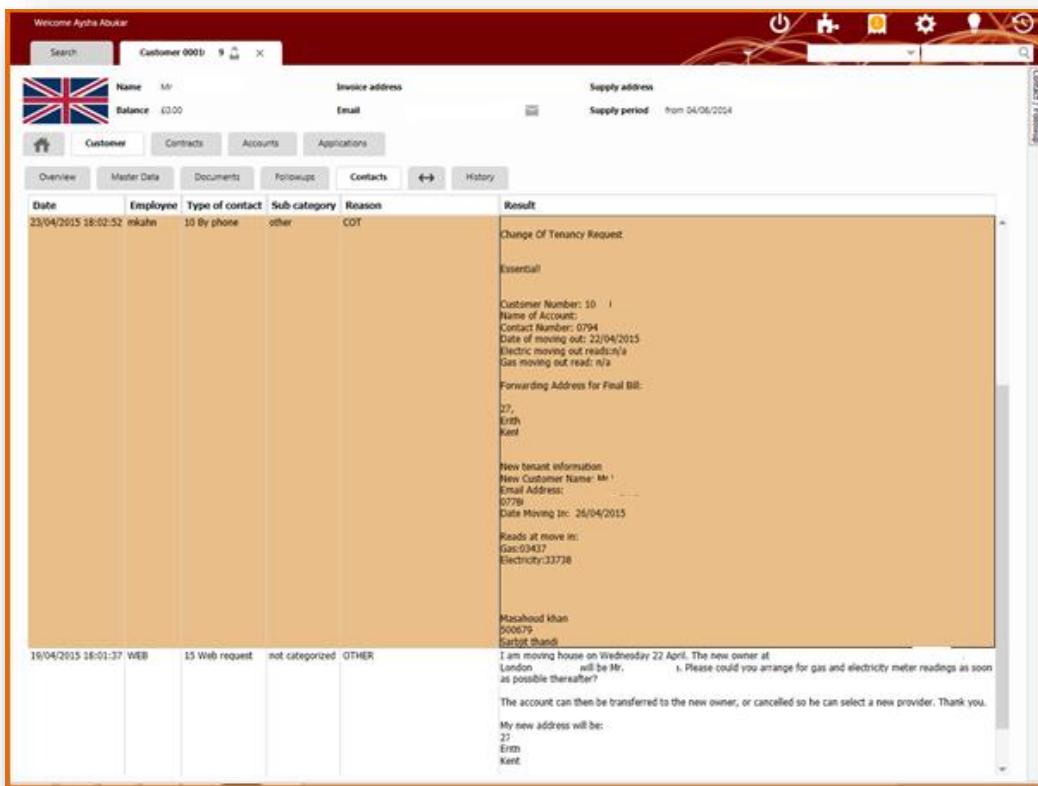
Max Tolerance: £10.00 [Show Info](#)

PROCESSING A CHANGE OF TENANCY

To process a change of tenancy you first need to ensure that it is the correct account that you are processing this on, as it cannot be reversed once completed.

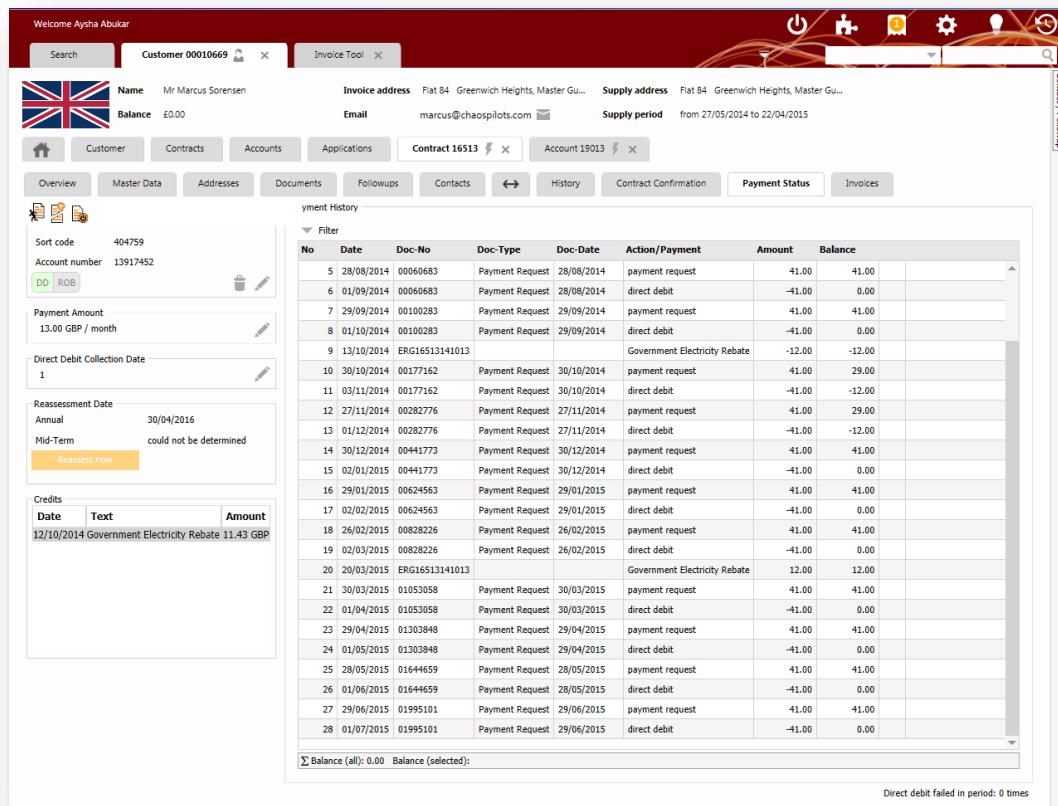


AS YOU CAN SEE FROM THE SCREEN BELOW, YOU NEED TO CHECK THE NOTES TO ENSURE THAT A CHANGE OF TENANCY HAS BEEN REQUESTED.



PROCESSING A CHANGE OF TENANCY

You will also need to check the payment status tab to ensure that there is no outstanding debt, from returned Direct Debits.

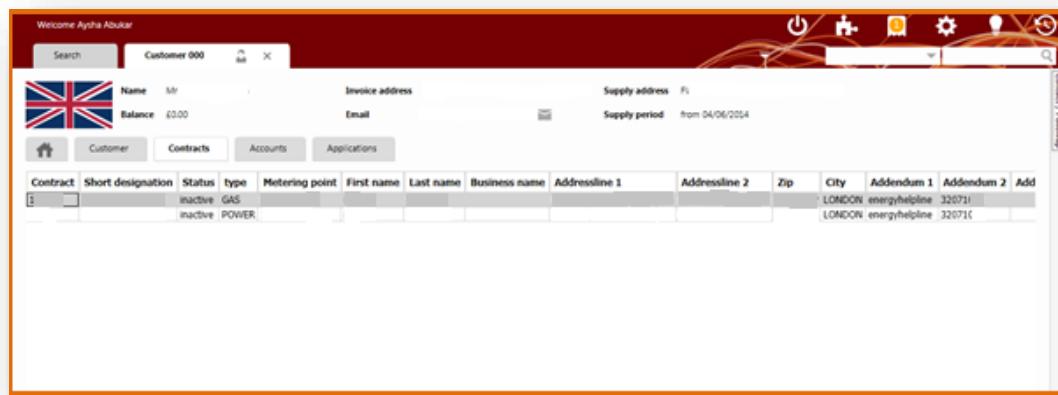


No	Date	Doc-No	Doc-Type	Doc-Date	Action/Payment	Amount	Balance
5	28/08/2014	00060683	Payment Request	28/08/2014	payment request	41.00	41.00
6	01/09/2014	00060683	Payment Request	28/08/2014	direct debit	-41.00	0.00
7	29/09/2014	00100283	Payment Request	29/09/2014	payment request	41.00	41.00
8	01/10/2014	00100283	Payment Request	29/09/2014	direct debit	-41.00	0.00
9	13/10/2014	ERG161513141013			Government Electricity Rebate	-12.00	-12.00
10	30/10/2014	00177162	Payment Request	30/10/2014	payment request	41.00	29.00
11	03/11/2014	00177162	Payment Request	30/10/2014	direct debit	-41.00	-12.00
12	27/11/2014	00282776	Payment Request	27/11/2014	payment request	41.00	29.00
13	01/12/2014	00282776	Payment Request	27/11/2014	direct debit	-41.00	-12.00
14	30/12/2014	00441773	Payment Request	30/12/2014	payment request	41.00	41.00
15	02/01/2015	00441773	Payment Request	30/12/2014	direct debit	-41.00	0.00
16	29/01/2015	00624563	Payment Request	29/01/2015	payment request	41.00	41.00
17	02/02/2015	00624563	Payment Request	29/01/2015	direct debit	-41.00	0.00
18	26/02/2015	00828226	Payment Request	26/02/2015	payment request	41.00	41.00
19	02/03/2015	00828226	Payment Request	26/02/2015	direct debit	-41.00	0.00
20	20/03/2015	ERG161513141013			Government Electricity Rebate	12.00	12.00
21	30/03/2015	01053058	Payment Request	30/03/2015	payment request	41.00	41.00
22	01/04/2015	01053058	Payment Request	30/03/2015	direct debit	-41.00	0.00
23	29/04/2015	01303948	Payment Request	29/04/2015	payment request	41.00	41.00
24	01/05/2015	01303948	Payment Request	29/04/2015	direct debit	-41.00	0.00
25	28/05/2015	01644659	Payment Request	28/05/2015	payment request	41.00	41.00
26	01/06/2015	01644659	Payment Request	28/05/2015	direct debit	-41.00	0.00
27	29/06/2015	01995101	Payment Request	29/06/2015	payment request	41.00	41.00
28	01/07/2015	01995101	Payment Request	29/06/2015	direct debit	-41.00	0.00

Σ Balance (all): 0.00 Balance (selected):

Direct debit failed in period: 0 times

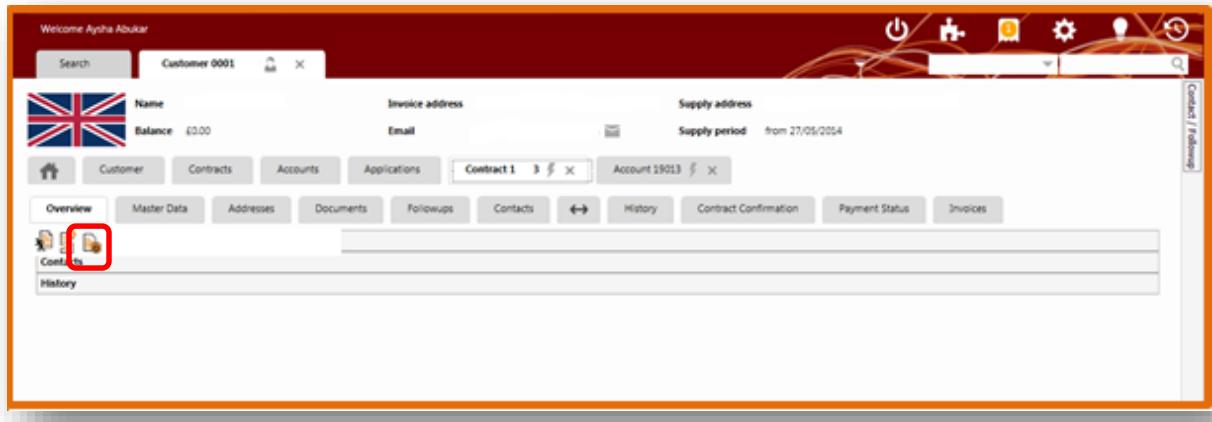
Always select the electricity first as this will complete the COT on both fuels



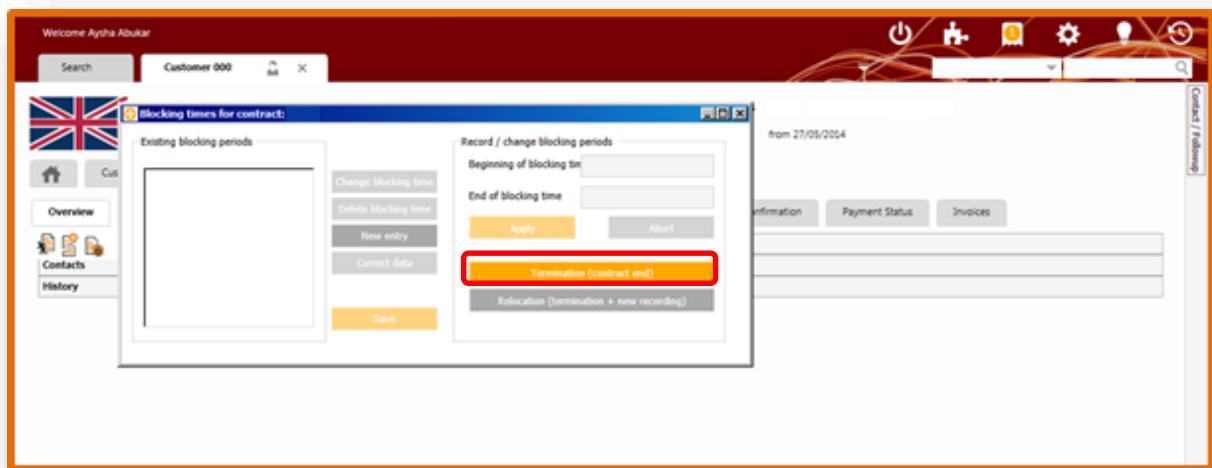
Contract	Short designation	Status	Type	Metering point	First name	Last name	Business name	Addressline 1	Addressline 2	Zip	City	Addendum 1	Addendum 2	Add
1		inactive	GAS								LONDON	energyhelpline	32071I	
		inactive	POWER								LONDON	energyhelpline	32071C	

PROCESSING A CHANGE OF TENANCY

To process the change of tenancy select the contract tab, then the running man icon, highlighted below on the left



Once the running man has been selected the pop up box below will come up. Select the grey relocation button.



PROCESSING A CHANGE OF TENANCY

Once the Change of Tenancy process has been started it cannot be stopped, it is therefore advisable to copy the notes and paste them outside of Account Plus.

The move out date will default to today. You need to ensure you change this to actual COT date.

Reading: if this box is ticked the reading will be used from the meter readings tab.

Contracts: the contracts that you wish to COT need to be selected.

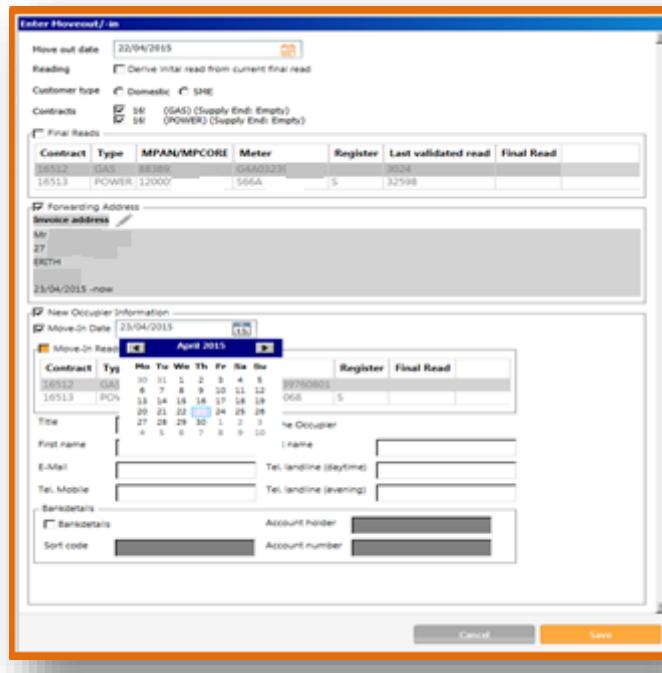
If no readings boxes are ticked then you can enter the reading manually.

If you have a forwarding address tick the box and highlight the pencil

Complete the new details in the pop up box.

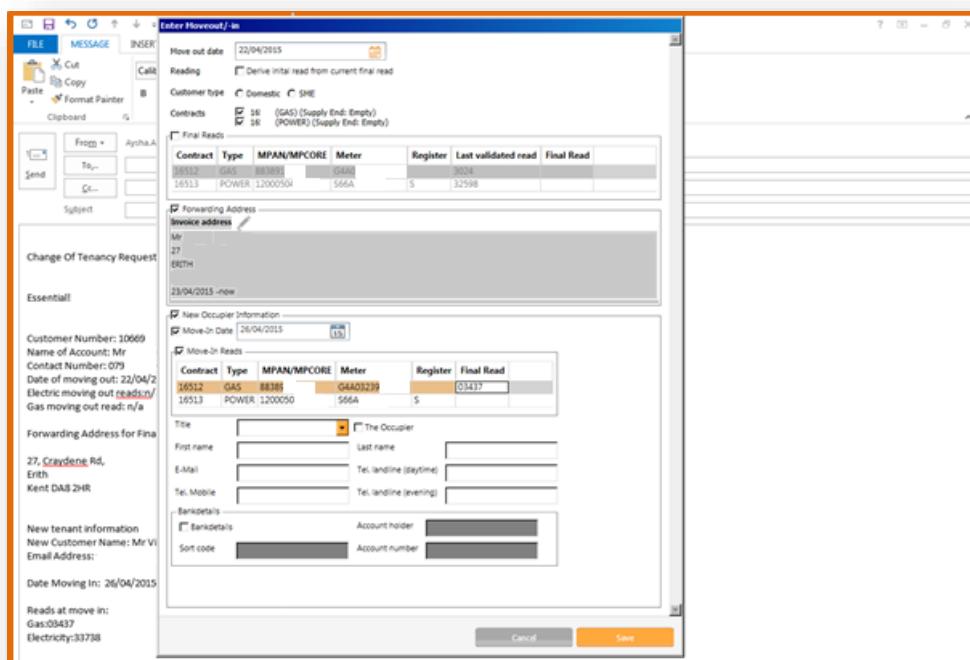
PROCESSING A CHANGE OF TENANCY

Select the new occupier information box, and select the Move in Date, do not assume that this will be the same as the move out date.



The screenshot shows the 'Enter Moveout/in' window. In the 'Move-in Read' section, the 'Move-in Date' is set to '23/04/2015'. The 'Move-in Read' table shows two contracts: 16512 (GAS) and 16513 (POWER). The meter for 16512 is 883891 and for 16513 is 566A. The register for 16512 is 3024 and for 16513 is 32598. The final read for both is also 32598. The 'Save' button is visible at the bottom right.

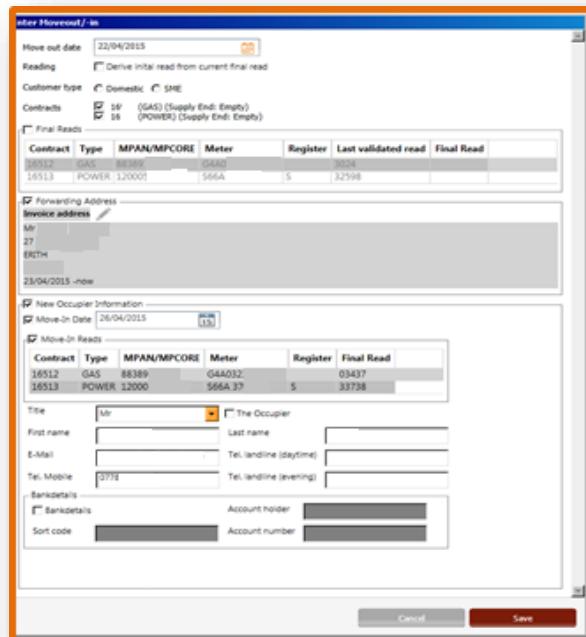
Now enter the readings, this will usually be the same as the move out, unless there is a large amount of time that has elapsed in between.



This screenshot shows the 'Enter Moveout/in' window with the 'Move-in Read' section highlighted. The 'Move-in Date' is now set to '26/04/2015'. The 'Move-in Read' table shows the same two contracts (16512 GAS and 16513 POWER) with their respective meter numbers, registers, and final reads. The 'Save' button is visible at the bottom right.

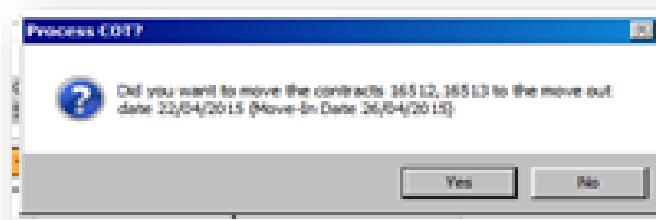
PROCESSING A CHANGE OF TENANCY

Now enter the new customer information of who is moving in. Once completed press save.



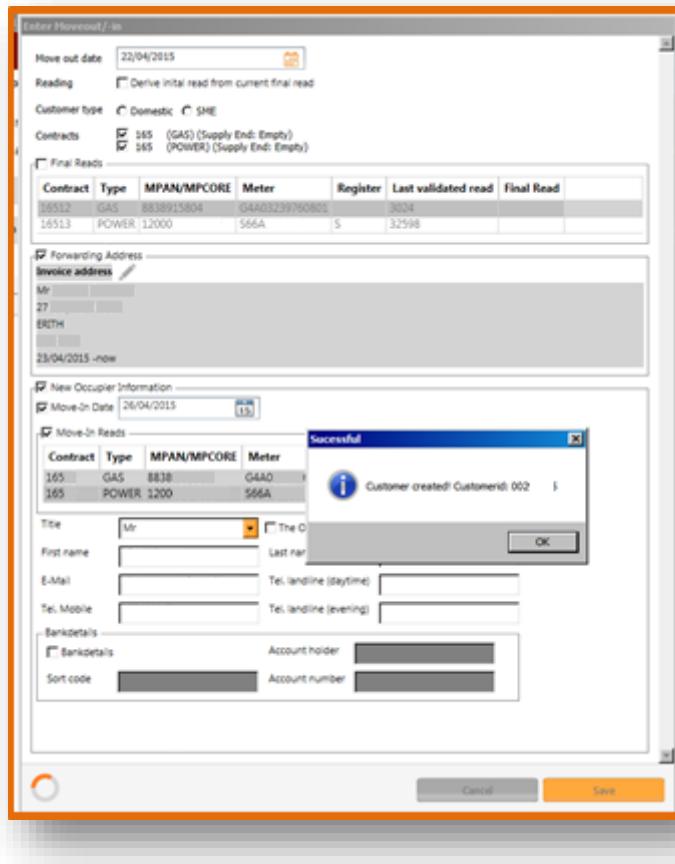
The screenshot shows the 'Move Movement / In' window. It includes fields for 'Move out date' (22/04/2015), 'Customer type' (Domestic), 'Contracts' (16 (GAS) (Supply End: Empty) and 16 (POWER) (Supply End: Empty)), and 'Final Reads'. Below these are sections for 'Forwarding Address' (Invoice address: Mr, 27, ERTH) and 'New Occupier Information' (Move-in Date: 26/04/2015). The 'Move-in Reads' section contains meter data for contracts 16512 and 16513. At the bottom are 'Cancel' and 'Save' buttons.

Once completed the message will ask that you are sure you wish to complete the COT.

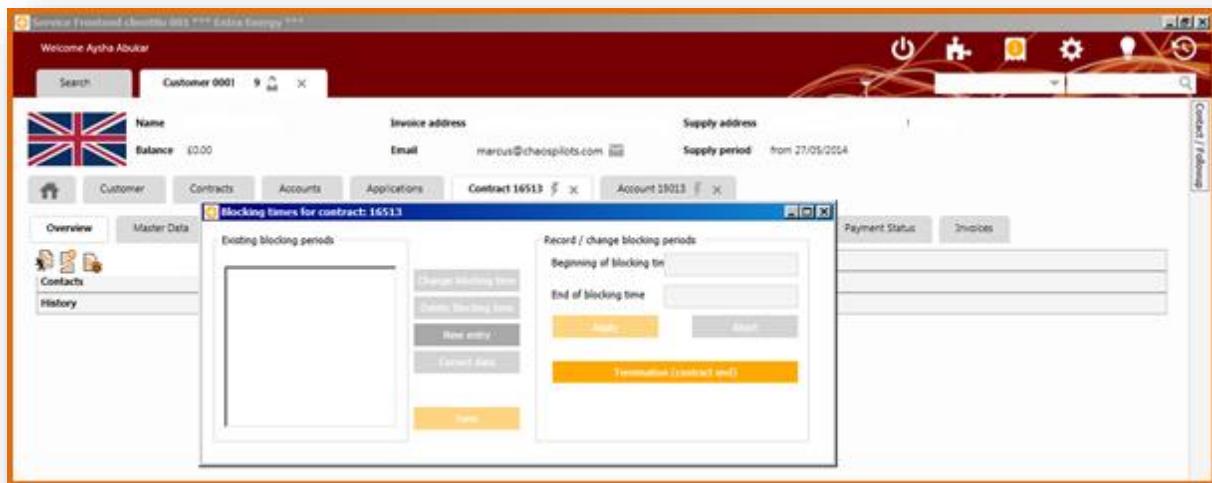


PROCESSING A CHANGE OF TENANCY

Now you will get a message letting you know this was successful and giving the new account number.
Keep a note of this.



This below screen will come up but without the relocation option. You can now close this.

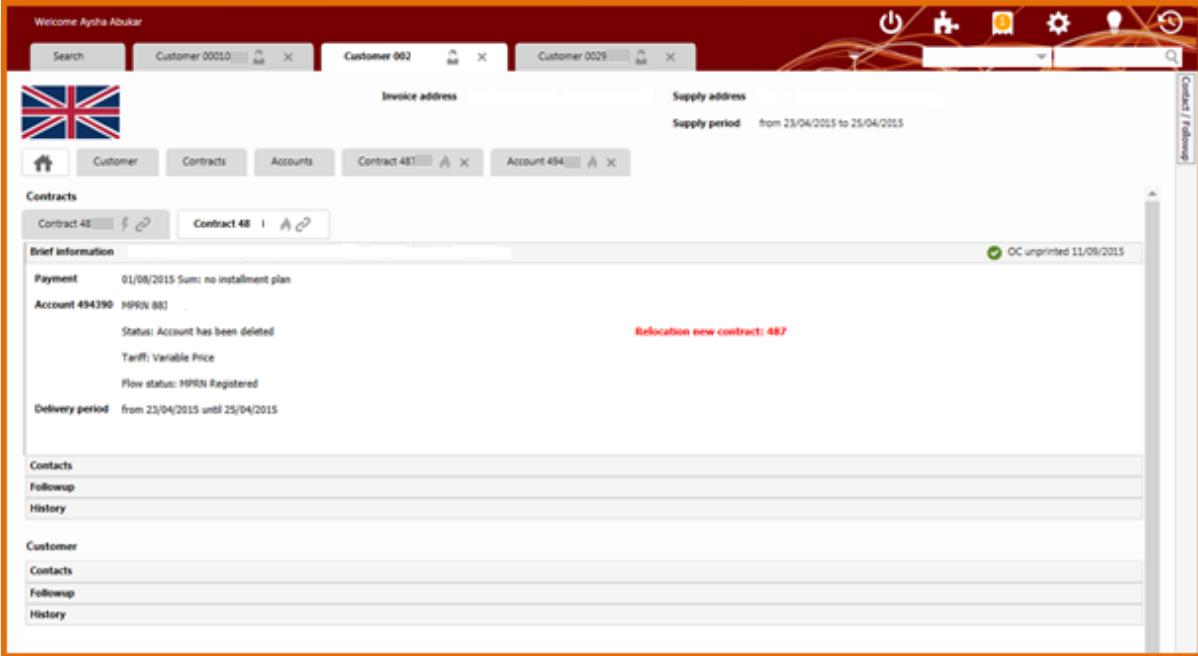


PROCESSING A CHANGE OF TENANCY

With this customer there was a period of two days between the new customer and the customer who has moved out. So for this address there are now 3 records:

- ❖ Moved out customer who we will final bill
- ❖ The Occupier for two days
- ❖ New customer who has moved in

This screen is the Occupier account, at this stage we won't do anything with this account.



The screenshot shows the extraenergy software interface. At the top, there are three tabs: 'Customer 00010' (active), 'Customer 002', and 'Customer 0029'. Below the tabs, there's a section for 'Invoice address' and 'Supply address' with a 'Supply period' from 23/04/2015 to 25/04/2015. The main content area displays 'Brief information' for Contract 48, which includes:

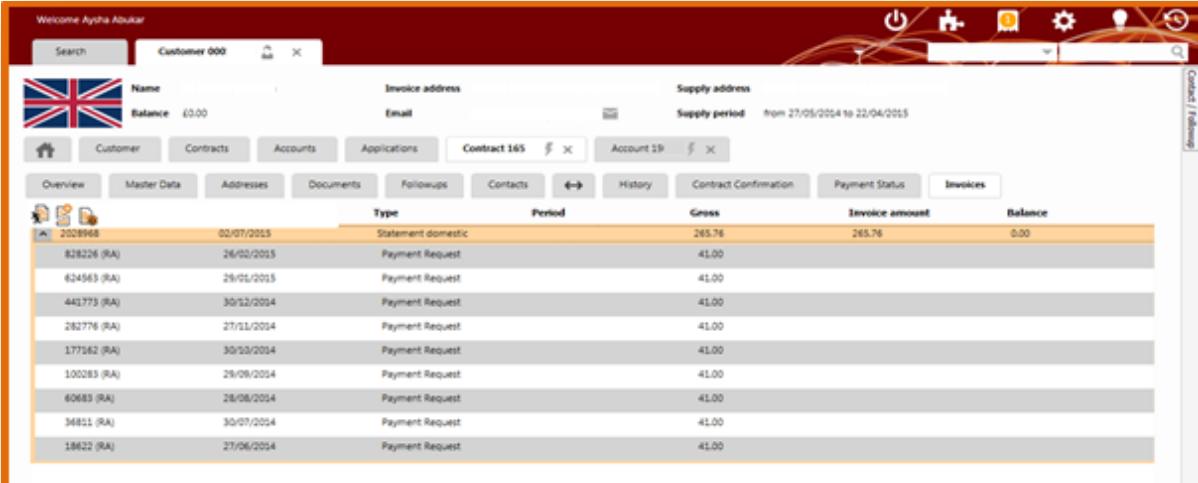
- Payment: 01/06/2015 Sum: no installment plan
- Account 494390 MPRN 883
- Status: Account has been deleted
- Tariff: Variable Price
- Flow status: MPRN Registered
- Delivery period: from 23/04/2015 until 25/04/2015

Below this, there are sections for 'Contracts' (Contract 48 selected), 'Contacts', 'Followup', and 'History'. On the right side, there are buttons for 'Customer / Followup' and other system icons.

PRODUCING THE FINAL BILL

First you need to go back into the correct customer check the last invoice on the account to ensure we haven't already billed past the COT date. If we had you would simply right click and cancel the invoice.

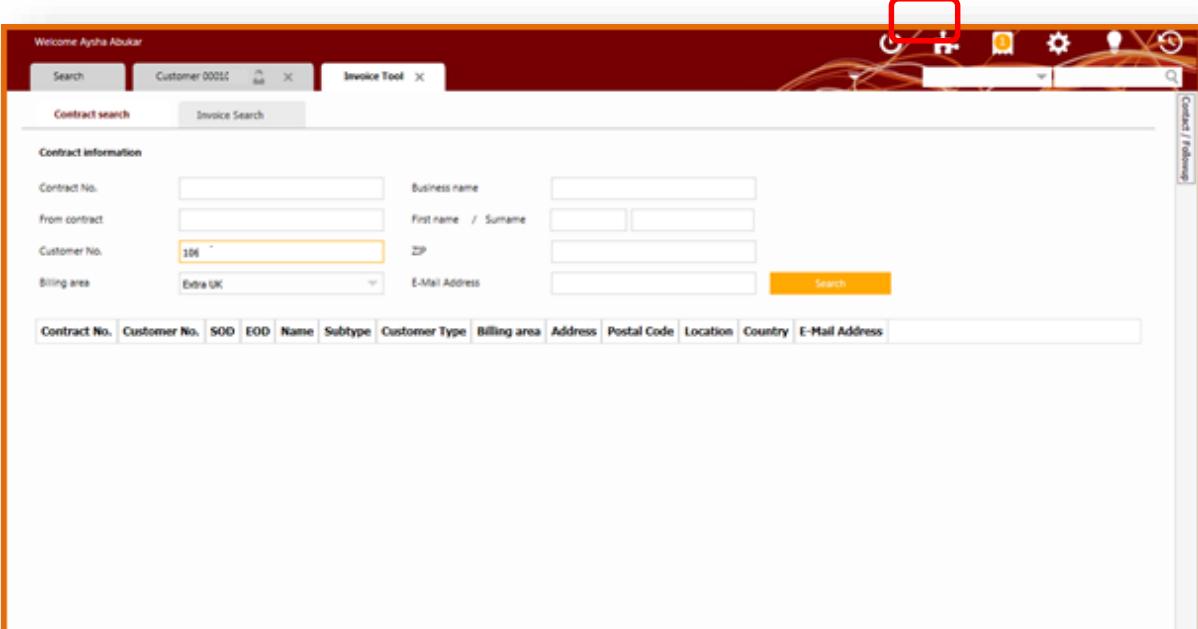
However the following screens will show you how to complete the final bill.



The screenshot shows the 'Customer' tab selected in the top navigation bar. Below it, there's a grid of invoices. The columns include:

	Type	Period	Gross	Invoice amount	Balance
2029968	Statement domestic	02/07/2015	265.76	265.76	0.00
828226 (RA)	Payment Request	26/02/2015	41.00		
624563 (RA)	Payment Request	29/01/2015	41.00		
441773 (RA)	Payment Request	30/12/2014	41.00		
282776 (RA)	Payment Request	27/11/2014	41.00		
177162 (RA)	Payment Request	30/10/2014	41.00		
100283 (RA)	Payment Request	29/09/2014	41.00		
60683 (RA)	Payment Request	28/08/2014	41.00		
36811 (RA)	Payment Request	30/07/2014	41.00		
18622 (RA)	Payment Request	27/06/2014	41.00		

To create the final invoice manually you do this via the billing tool, this is the jigsaw piece icon in the top right hand corner.



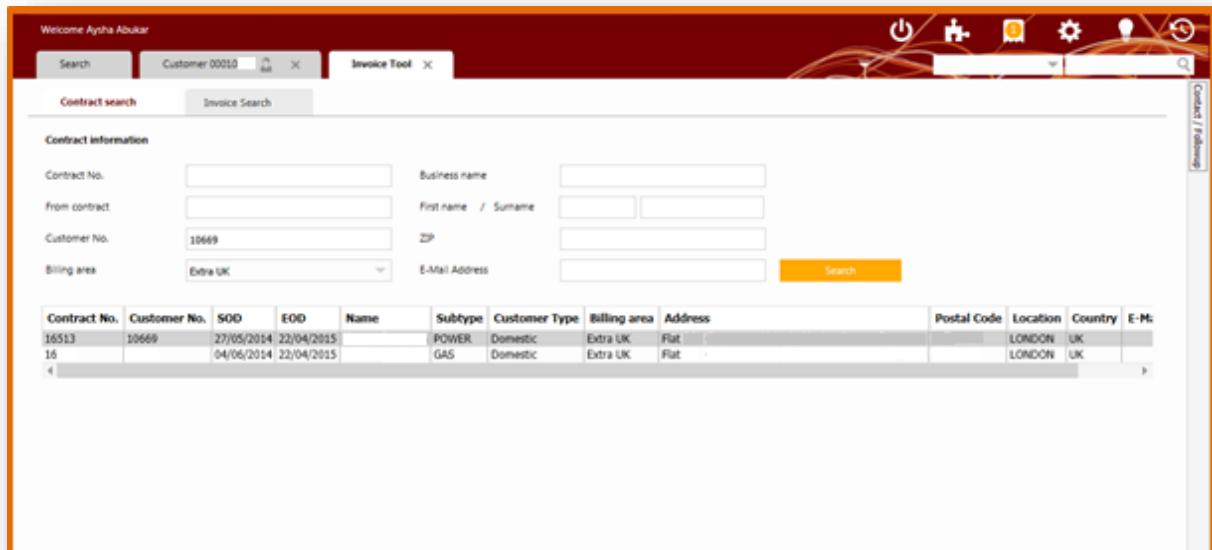
The screenshot shows the 'Invoice Tool' tab selected in the top navigation bar. The interface includes fields for 'Contract search' and 'Invoice Search'. The 'Contract information' section contains fields for:

- Contract No.:
- From contract:
- Customer No.:
- Billing area:
- Business name:
- First name / Surname:
- ZIP:
- E-Mail Address:

A 'Search' button is located at the bottom right of the search area. Below the search area is a table with columns: Contract No., Customer No., SOD, EOD, Name, Subtype, Customer Type, Billing area, Address, Postal Code, Location, Country, and E-Mail Address.

BILLING PERIOD

Once in the Invoice tool you search for the customer, you can use the customer number or the contract number, it may be easier to the contract number for SME accounts. You can select either fuel to progress the invoice as the tool will dual fuel the bill.



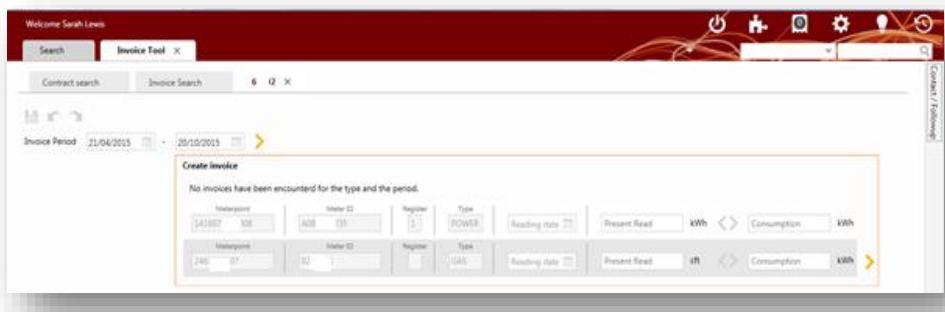
Contract No.	Customer No.	SOD	EOD	Name	Subtype	Customer Type	Billing area	Address	Postal Code	Location	Country	E-Mail
16513	10669	27/05/2014	22/04/2015		POWER	Domestic	Extra UK	Flat		LONDON	UK	
16		04/06/2014	22/04/2015		GAS	Domestic	Extra UK	Flat		LONDON	UK	
4												

In the screen shot below you check the date you are billing for are accurate. The start read should be the day following the bill to date on the last invoice. The end date should be the day after the Change of Tenancy date, this is so that the system picks this up as a final invoice. To continue select the arrow on the right of the dates.

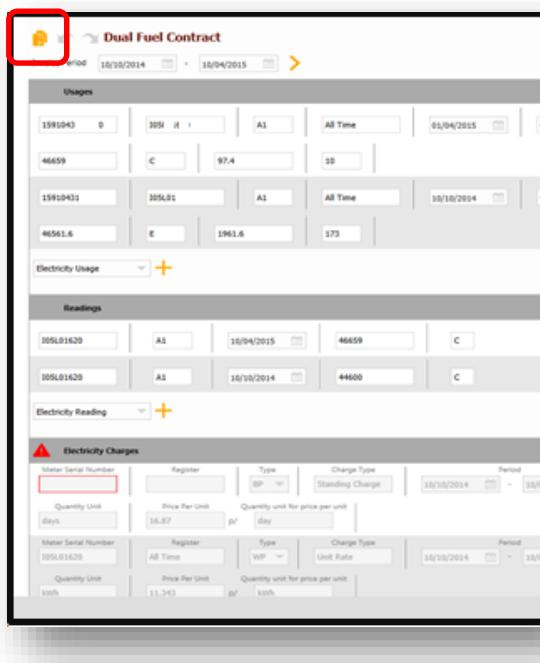


BILLING TO THE CORRECT READINGS

The screen below is checking that no invoices have already been created for that period. There again is an arrow on the right of the screen to allow you to continue.



The screen below shows this customer is a dual fuel customer and shows the dates and readings they are being billed for. You should ensure these match what is in Account Plus the select the continue button highlighted below. You may get another similar screen come up for the other fuel, check that and press the same button to continue. This process would be the same for E7, or E10.



At this point the box shown below will either be Red to show an error or why the bill cannot be produced or more commonly green to show it has been saved. It does contain text to give an indication of what has happened. If the message was green the bill will be placed on hold to be checked.





SOME COMMON ERRORS, HOW TO WORK THEM

The bill to date on the previous invoice are not the same for each fuel, so I am getting an error message.

What do we do in this scenario?

Answer: This is a known error, however to work around it you can cancel the previous invoices and rebill.

What if there is a billing block on the account?

Answer: Only SA's and Team Managers can remove a billing block other than disputed readings so this would need to be escalated.

I tried to create an invoice following the COT.

Went through the process of producing the final bill, but when creating the invoice it did not pull forward the final reads to close the account, it pulled across some previous estimated reads.

This meant that the final invoice was estimated and not to the customer reads that they had provided. How can I ensure it uses the customer readings?

Answer:

The system needs a few minutes to refresh after the COT before the billing function will pick up the COT reads. The suggestion is to allow 5 minutes (maybe a period to update notes) between the COT and producing the bill that this should remedy the problem you saw in this scenario.

- ❖ DC – Data Collector
- ❖ DA – Data Aggregator
- ❖ MOP – Meter Operator
- ❖ MPAS – Meter Point Administration Service
- ❖ MPAN – Meter Point Administration Number
- ❖ DNO – Distribution Network Operator
- ❖ ECOES – Electricity Central Online Enquiry Service
- ❖ EAC – Estimated Annual Consumption
- ❖ S Number – Supply Number
- ❖ PC – Profile Class
- ❖ MTC – Meter Timeswitch Code
- ❖ LLF – Line Loss Factor
- ❖ MSN – Meter Serial Number
- ❖ PES ID – Public Electricity Supplier ID
- ❖ IGT – Independent Gas Transporter
- ❖ MPRN – Meter Point Reference Number
- ❖ AQ – Annual Quantity
- ❖ MAM – Meter Asset Manager
- ❖ MRA – Meter Reading Agent
- ❖ MAP – Meter Asset Provider
- ❖ XOSERVE – Gas distributor / System