COS (Change of Supply) Bill creation and checks

1. Go into "**Customer**" then "**Contacts**" to check the notes regarding the account so you're up to date with the account status

2. Go into "**Contracts**" then "**Invoices**" to see what bills have been released or are on hold

   Stat 8 – On hold ready to be checked and released
   RA or blank – The bill has already been released

   If a bill has been released and it's **not a final bill** but a final bill needs to be released then delete all the invoices by **right clicking** on them then selecting **cancel invoice** then create a new bill using the **jigsaw icon**.
   Now you should have a Final Bill (stat 8)

3. Check the invoice dates match those on account plus in the top right corner labelled Supply period

   E.g. Supply Period: 20/09/2014 – 27/11/2015

   If this isn't there then that potentially means a final bill isn't due and you can move on (however if unsure check with SA or a Team Manager

4. Check the tariff matches to what we have on accounts plus which can be found in "**Accounts**" then "**Tariff**"

5. Check the meter readings match which are under "**Accounts**" then "**Meter Readings**" you'll be looking to see if the dates of the meter reads along with the figures closely match what's on the bill. The closing read should be either the D86 or CREGI but if it these are not validated it could cause an error on the bill however if the reads match this shouldn't be an issue.

6. Check the MSN (Meter Serial Number) matches what we have on the system which are found under meter readings. You can find the MSN on the bill underneath the Elec/Gas Usage and Charges. If you can't find the MSN in the meter section then this can also be found in "**Accounts**" then "**Master Data**"

7. Finally just make sure the payments match by going into "**Contract**" then "**Payment Status**"

   Now just go back to invoices and if you're happy with the result right click the final bill and select lock/unlock ☺