Comprehensive Guide to Customer Management Features

This article provides an in-depth overview of the various features available for managing customer accounts, including navigation options, account alerts, and detailed tabs for customer information, utility accounts, communication logs, and billing.

Customer Hierarchy Trail

The customer hierarchy trail allows users to navigate through the different levels of customer accounts, providing a clear view of relationships and account structures.

Customer Overview Panel

The customer overview panel presents a summary of key customer information, enabling quick access to essential details.

Account Alerts

Account alerts notify users of important updates or actions required for customer accounts, ensuring timely responses to critical issues.

Recent Activity Section

This section displays the latest activities related to the customer account, helping users stay informed about recent interactions and transactions.

Common Tasks Bar

The common tasks bar provides quick links to frequently performed actions, streamlining the workflow for users managing customer accounts.

Customer Summary Tabs

Customer summary tabs organize information into distinct sections, allowing users to easily navigate through various aspects of the customer account.

Changing the Default Top Level Navigation Options

Users can customize the default top-level navigation options to better suit their workflow and preferences.

Changing the Default Tabs within the Customer Summary Screen

This feature allows users to modify which tabs are displayed by default in the customer summary screen, enhancing usability.

Showing and Hiding Tabs in the Customer Summary Screen

Users can choose to show or hide specific tabs in the customer summary screen, tailoring the interface to their needs.

Changing Communication Log Display Options

Adjusting the display options for the communication log helps users manage how communication history is presented.

Customer Information Tab

Viewing Customer Information:

This section details how to view comprehensive information about a customer.

Editing Customer Information:

Instructions for editing customer information are provided to ensure accuracy and up-to-date records.

Utility Accounts (ESI / LDC) Tab

Accessing the Utility Accounts Tab:

Guidelines for accessing the utility accounts tab are outlined for user convenience.

Utility Accounts Tab Overview:

This overview explains the purpose and functionality of the utility accounts tab.

Functionality Available within the Utility Accounts Tab:

Details on the various functions available within the utility accounts tab are discussed.

Transaction History Panel Layout:

The layout of the transaction history panel is described to assist users in navigating transaction records.

Viewing Transaction Details:

Instructions for viewing detailed transaction information are provided.

Create Market Transaction:

Steps for creating a market transaction are outlined for user reference.

View Consumption:

Users can learn how to view consumption data related to utility accounts.

Editing Premise Information:

Instructions for editing premise information are included to ensure accurate records.

Communication Log Tab

Accessing the Communication Log Tab:

Guidelines for accessing the communication log tab are provided.

Communication Log Tab Overview:

This overview explains the features and purpose of the communication log tab.

Communication Log Core Features:

Core features of the communication log are discussed to highlight its importance in customer management.

To add additional memos to existing communication log entries:

Instructions for adding memos to communication log entries are provided.

To send a letter to a customer:

Steps for sending letters to customers are outlined.

To resend a letter to a customer:

Instructions for resending letters to customers are included.

AR / Billing Tab

Accessing the AR / Billing Tab:

Guidelines for accessing the AR / billing tab are provided.

AR / Billing Tab Overview:

This overview explains the features and purpose of the AR / billing tab.

AR / Billing Core Features:

Core features of the AR / billing tab are discussed.

Invoice Management:

To view invoice summary and detail level information:

Instructions for viewing invoice summaries and details are provided.

To Email a Customer’s Invoice:

Steps for emailing invoices to customers are outlined.

To view a Customer’s Invoice:

Instructions for viewing customer invoices are included.

To reverse invoice charges:

Steps for reversing invoice charges are provided.

To create an invoice Special Charge via AR Summary History:

Instructions for creating special charges are included.

To Remove a pending Invoice Special Charge:

Steps for removing pending special charges are outlined.

Managing Adjustments

To create an adjustment on the customer’s account:

Instructions for creating account adjustments are provided.

Managing Payments

To view payment summary and detail level information:

Instructions for viewing payment summaries and details are included.

To post payments to the customer invoices using FIFO:

Steps for posting payments using FIFO are outlined.

To post payments to the customer invoices using SPEC:

Instructions for posting payments using SPEC are provided.

Viewing Accounts Receivable history

To Print or email the customer's AR History:

Instructions for printing or emailing AR history are included.

Organizational Master

Customer Hierarchy Management Core Features:

This section discusses the core features of customer hierarchy management.

To assign customers to a master customer:

Instructions for assigning customers to a master customer are provided.

To create a new master level customer:

Steps for creating a new master level customer are outlined.

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