City of Wurtland Training Session Agenda

Objectives: To provide our clients with the knowledge, skills & ability to be able to be able to function within Account Central, Processing, and beyond.

Outcomes: By the end of this training you will be able to:

- Sign-in & know how to update/add user ID's and passwords

- Navigate to Account Central via Search Tool or direct lookup by Account Number

- Understand all sections in Account Central

- Understand common processing such as billing, payments, penalties, and notices

- Know how to set up items from a Maintenance level which can be added to further the use of the system

Who should attend? All staff that will be utilizing the software
How long will training last? TBD
How is training conducted? Video: WebEx / Audio: Conference Call
Prerequisites: None

Account Central Overview and General System Processing

- **Logging In/Setting up Users (EST: 20 Min)**
    - Explanation of dashboard/modules
    - How to edit user ID's or passwords and add a new user
    - Security

- **Searching for Account(s) (EST: 10 Min)**
    - Access Account Search Tool
    - Access Account Lookup Tool

- **Account Central Overview (EST: 1 Hour)**
    - Colored Status Flags
    - Billing Groups
    - General Information
    - Transactions
    - Balances/Credit History
    - Account Log
    - Services/Meters
    - Usage
    - Charges

- Payment Method/Portal Payments
- Payment Plans
- Customers/Alternative Address
- Customer Notes
- Attachments/Reports
- Details
- Alerts
- Account Update Wizard
- Google Map
- Security Question
- Quick Calc
- Settings tab
- Audit Log

- **Functions within Account Central (EST: 1 Hour)**
  - Finalization
  - Meter Exchange (Only if work orders are not being utilized, otherwise complete with work order)

- **Create a new account (EST: 15 Min)**
  - Add a meter

- **Creating items to be used while performing working tasks (EST: 15 Min)**
  - Maneuvering to Maintenance
  - Set up the following items prior to training to use as examples and then briefly explain where to find them and how to set them up.
    - Customer Service Log Types
    - Alert Types
    - Security Questions
    - Action Codes/Suspend Action Codes
    - Misc Charges

Billing (EST: 2 Hours)

- **Creating, calculating and posting**
  - Regular Billing
  - Corrected Billing
  - Final Billing (If Done in Batches)

Payments and Adjustments (EST: 1- 1 ½ Hours)

- **Processing and posting**
  - Payments
  - Reverse Payments

- Adding Deposits
- Adjustments

Penalties and Delinquent Notices (EST: 1-1 ½ Hours)

- **Processing Penalties**
  - Penalty Batch Process

- **Delinquency Batches**
  - Processing a Delinquent Letter Batch
  - Processing other forms such as Refunds or Collections

Service Order Module (EST: 1 Hour)

- **Navigating the Service Order Module**
  - Review of Module
  - Creating Service Orders
  - Maintenance
    - Staff Setup
  - Reporting

Customer Notification Module (EST: 30 Min)

- ***Tentative upon notifications agreement approval**
  - Set up of customer(s) method of notifications
  - Creating Templates
  - Creating Campaigns
    - Through Delinquent letters process

Customer Portal Module and Demo (EST: 45 Min)

- **Customer Portal Module**
  - Understanding the Module
  - Processing Payments
  - Features and Misc Options

- **Customer Portal Demo**
  - Accessing the Customer Portal Site
  - Demo of Features and Functionality

Reports (EST: 30 Min)

- **General Report Overview**
  - Report Navigation and Features
  - Commonly Used Reports
  - Special Tips