

Fact Sheet – Move In or Move Out functionality

One of the most labor-intensive actions is Moving a customer in or out, or sometimes between two properties within the area served by the one city or utility. The process should be highly configurable and should also allow for common events such as a change in date or a cancellation. With a cancellation the Move In or Out may have already been carried out in the billing system and have to be “undone”; a good billing system should support these actions as automatically as possible. Where a customer is transferring between properties, all of their banking and security deposit data should follow them to the new address.

During any customer call, but especially at Move In, the Customer Service Officer should have ready access to a knowledge base of relevant information. Typically this information is stored on an Intranet and available to a wider audience than just the users of the billing application. It should be accessible via a hyperlink, rather than being maintained on the intranet and with the billing system.

One of the important features of a Move In is generating a Welcome Pack. This usually includes a welcome letter setting out the “rules of engagement” - what the customer has signed up for, their obligations and rights, and the service they can expect. It may include a customer contract the customer is expected to sign and return.

Equally a Move Out may generate a Final Bill (if a consumption-based account) or the transfer of unpaid charges from the outgoing to the incoming customer. It may also include a letter of creditworthiness, so that when the customer moves to a new utility their deposit may be waived.