

Organic New Hire

Peace - Navigating and Searching

Simple. Friendly. Direct.

Student Guide

**Version 1.0
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Introduction

OVERVIEW



Peace is the system that you will use during virtually every customer call. *Peace* is a customer information and billing system that contains each customer's personal information and billing history. You will access *Peace* to research customer's accounts and assist them with requests.

Objectives

By the end of this module, you will be able to:

- Launch the Peace System
- Search for account information in Peace
- Recite the major components of each Peace window
- Use the Customer Enquiry menu to view a customer's account
- Perform updates using the Customer Maintenance menu
- Review information about the property in the Premise Enquiry menu
- Complete the setup of credit arrangements for a customer

TERMS



Here is a list of terms introduced in this module.

New Term	Definition
EPP	Equal Payment Plan
PTJ	Process Tracking Job
Wildcard	A wildcard is a symbol that instructs <i>Peace</i> to display names that are similar in spelling to the one you are searching for. In <i>Peace</i> the asterisk (*) is a wildcard symbol.



Here is a list of the lessons in this module.

Lesson #	Lesson Title
1	Accessing <i>Peace</i>
2	Searching <i>Peace</i>
3	The Components of the <i>Peace</i> Window
4	Customer Enquiry Menu Button
5	Customer Maintenance Menu Button
6	Premise Enquiry Menu Button
7	Other Menu Buttons

Lesson 1

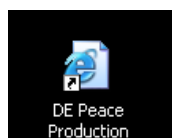
Accessing *Peace*



Peace is a web-based application – as opposed to software that is installed on your computer. Web-based applications are stored on a server and allow users to access and view the same data, such as our customer information.

To launch *Peace*, perform the following steps:

1. Double click the ***Peace*** Icon on your desktop (your computer screen).



2. Enter your unique user ID and password.

NOTE: Your user ID and password are case sensitive. You must enter the information exactly as it was given to you.



3. Enter your user ID and password.

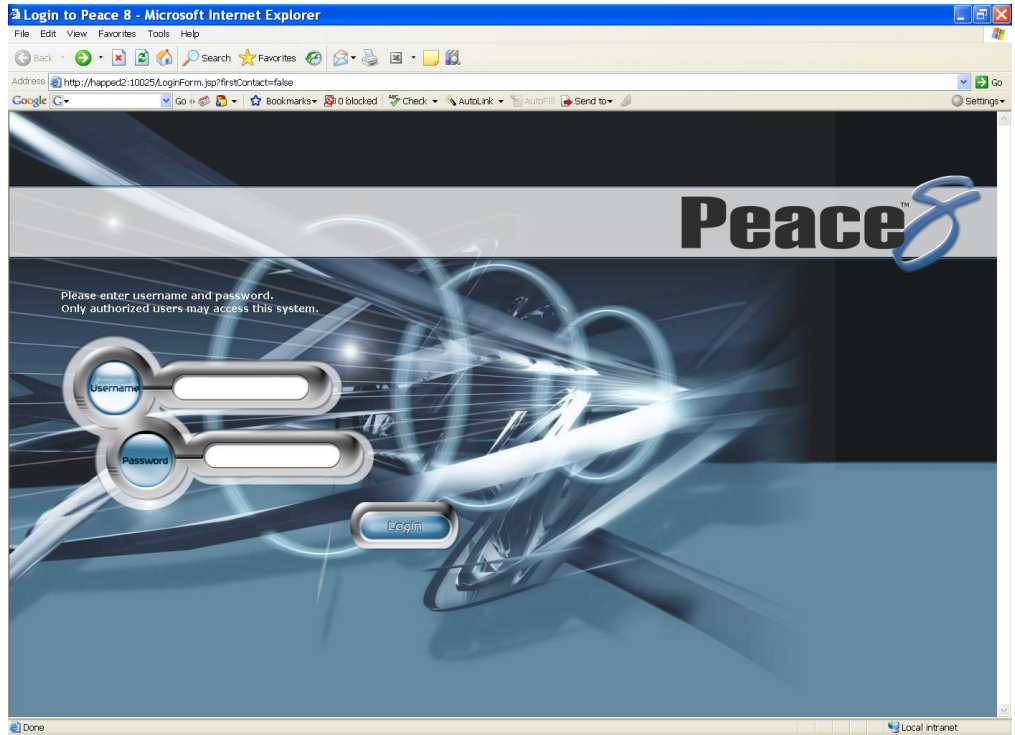


Figure 1: Peace Login Window



Peace opens to the main menu. From there you can search for information about a specific account by clicking **Customer Care**.

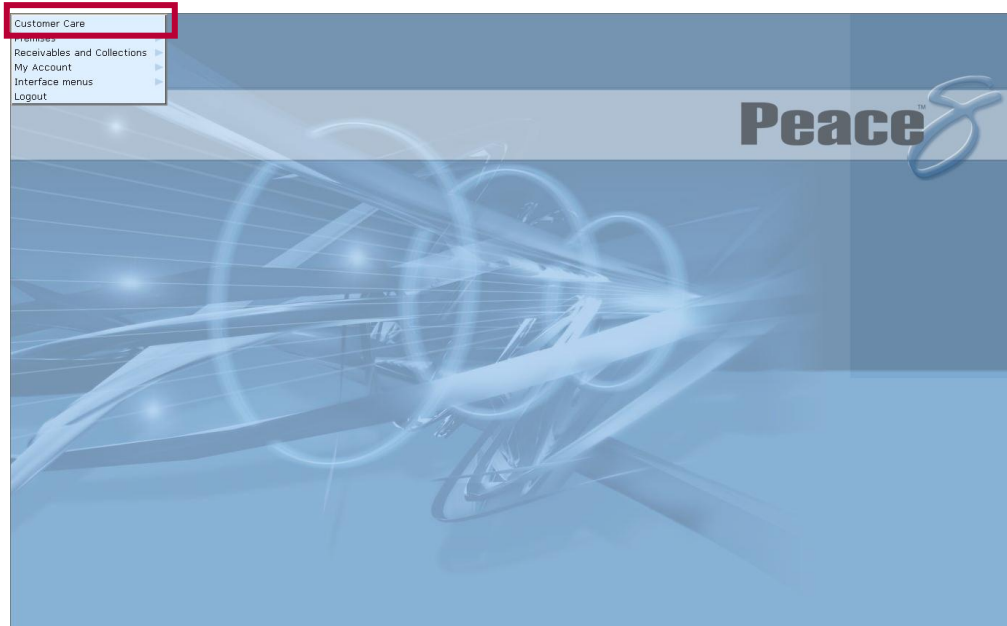


Figure 2: Main Menu

Below is the Customer Care menu.

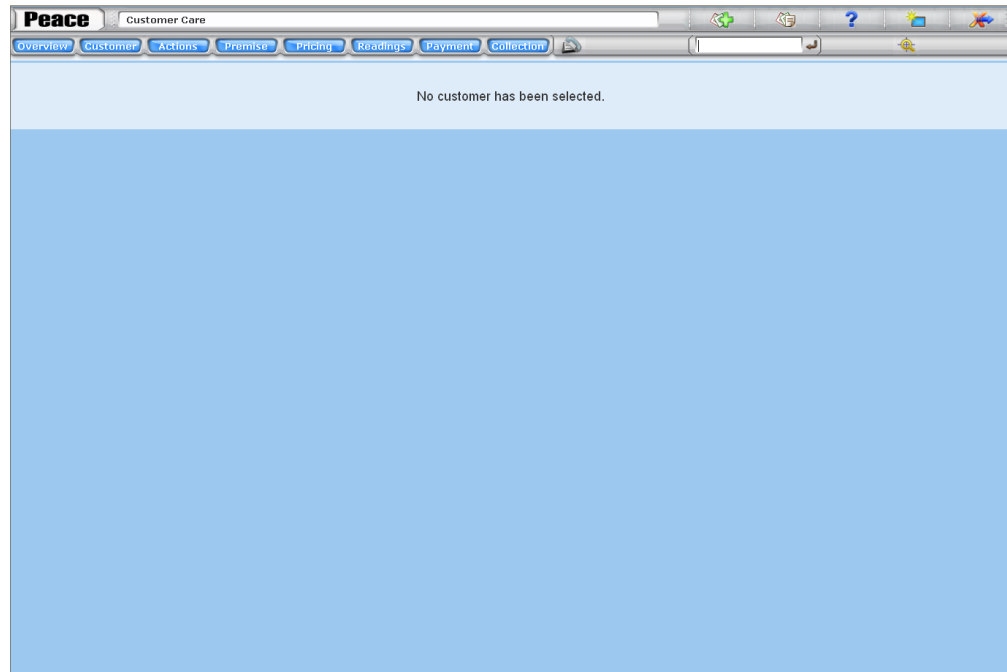


Figure 3: Customer Care Menu

Exercise: Logging into Peace



Directions: Log into the training system using the generic user ID and password that your instructor gave you. Review the different options available to you when accessing *Peace*.

Below write in the account number that your instructor has given you for your records.

Citrix Training ID Login: ad_train_ _ _

Citrix Password: password _ _ _

Peace Training Login: train_ _

Peace Password: train_ _

Account Number: _____

What would you like to remember about logging in to the *Peace* system?

Lesson 2

Searching *Peace*



Prior to selecting an account, there are only a few options available to you in the Customer Care menu. These are highlighted numbered below.

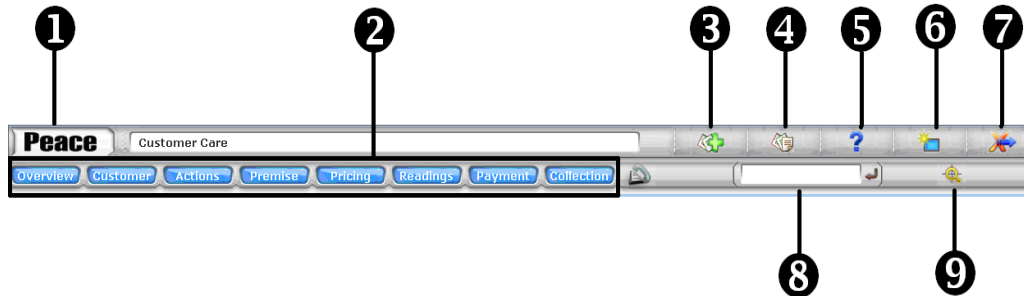


Figure 4: Customer Care Menu Button

- 1. Peace Button**
- 2. Customer Care Menu Buttons**
- 3. Log a Process**
- 4. To Do List**
- 5. Help**
- 6. Reset**
- 7. Exit**
- 8. Quick Search**
- 9. Advanced Search**




When performing a Customer Search you can use a variety of criteria to access an account. The easiest way is to type the account number into the text field and then click the  button or press the enter key. Since this number is unique to an account, you will normally only see the desired customer account; however, other accounts that use the same numbers could also appear.



Figure 5: Text Search Field

Because many customers do not have their account number available, you can also perform a Customer Search by typing in the customer's last name.

You can search for a customer by typing the entire last name (for example, 'Johnson') or by typing the first few letters of the last name ('Johns').

Typing the last name in the Customer Search field will bring up all customers with that last name (which could literally be hundreds). If your search causes more than 100 records to be returned, *Peace* will display the following error message:



Figure 6: Records Error Message

NOTE: Although the results window lists the names in alphabetical order, the system randomly selects 100 records from the total number. When you get a message like this, it is best to narrow your search by providing more detail and trying again. Next, you will learn how to do an advanced search.

NOTE: *Peace* has a wildcard character that you can use if you are not sure how to spell the name or premise. The wildcard in *Peace* is the * (**SHIFT+8**). Typing an asterisk at the end of your 'best guess' at spelling will bring up all similar spellings of the name or premise you are searching for.

Exercise: Searching for Accounts



Directions: Use *Peace* to locate two account numbers that you can use for this exercise.

1. Write the first account number here: _____

What information do you see?

2. Write the second account number here: _____

Write down any differences that you see between the two accounts?


3. Search for a customer by using the last name of 'Smith'. Notice the number of accounts that are returned.

4. Search again using the last name of 'Lull'. Notice the difference in the information that is returned.



Refining Your Search

Searching by the account number is the easiest and most accurate way to search in *Peace*. There are times, however, when you will need to search for the account using information other than the account number. In situations like that, you can use *Peace's* Advanced Search to help you refine your search.

Once you click on the Advanced Search button , the following screen will appear:

A screenshot of a web browser window titled 'Advanced Search - Microsoft Internet Explorer'. The browser's address bar shows 'Advanced Search'. The page has four tabs: 'General', 'Reference Nos', 'Options', and 'Results', with 'General' selected. The form is organized into several sections: 1. Personal Information: 'Last Name' and 'First Names' (text boxes), 'Phone' (text box), and checkboxes for 'Use Soundex Search?' and 'Is this a Company Name?'. 2. Address: '#', 'Street #', 'Street', 'City', and 'Zipcode' (text boxes), and 'Premise Contact' (text box). 3. External Reference: 'Participant' (dropdown menu with 'All Market Participants' selected), 'Role' (dropdown menu with 'All Participant Roles' selected), 'External Code' (text box), and a checkbox for 'Display current External References only?'. At the bottom right, there are three buttons: 'Search', 'Clear', and 'Stop'.

Figure 7: Advanced Search Window



With Advanced Search you can perform searches using criteria such as:

- First and last name
- Premise address
- Premise number
- Postal address
- Social security number
- Phone number
- External code (ESI ID – identifies the location)
- PTJ number
- Statement Number
- Meter Number

NOTE: Because the Advanced Search feature opens in a separate window, it uses two user licenses. Since we have a limited number of user licenses, make sure to close the Advanced Search window when you are done to allow other users access.

NOTE: *Peace* has a wildcard character that you can use if you are not sure how to spell the name or premise. The wildcard in *Peace* is the * (**SHIFT+8**). Typing an asterisk at the end of your 'best guess' at spelling will bring up all similar spellings of the name or premise you are searching for.



Enter your criteria and click the **Search** button, then wait a second or two and scroll to the bottom of the window. Your search results will appear there. You will see a list of all of the records that match your search or you will get a message stating no records were found using that search criteria.

General Reference Nos Options Results				
Identifier	Premise	Name	Address	Status
1108451		SMITH, BYFORD		No Premise
1019153	1012280	SMITH, MS BECKY	4200 W.34TH 210 HOU...	Current from 10/25/2002
963023	955199	SMITH, BYRON	3708 LASKER AVE WA...	Current from 08/15/2002
955367	947667	SMITH, BOBBIE	3216 KESSLER AVE MI...	Current from 07/29/2002
893434	885031	SMITH, B.D.	5116 AUDREY ST DALL...	Current from 05/20/2002
10899	1899	SMITH, BARRY	625 WILLOW ST HURS...	Current from 04/29/2002

Figure 8: Advanced Search Results

Remember to use the **Clear** button between searches so that you clear the information from the previous search.

The instructor will now lead you into a simulation that will step you through launching *Peace*, logging on and then searching by account number, phone number, name and social security number.

Exercise: Advanced Searches



Directions: Using Advanced Search, search for information by inputting one of the search criteria in the lesson.

Ask your instructor the following questions.

1. Why would a customer have his ESI ID but not his account number?

2. Why would you need to search using the PTJ?

Remember This

What would you like to remember about searching within *Peace*?



Understanding the Search Results

When you search for a record in the *Peace* system, one of four conditions will exist:

- No records match your search criteria
- One record matches your search criteria
- Multiple records (less than 100) match your search criteria
- More than 100 records match your search criteria

If **no** records match your search criteria, you will receive a message stating there are no Search Results.

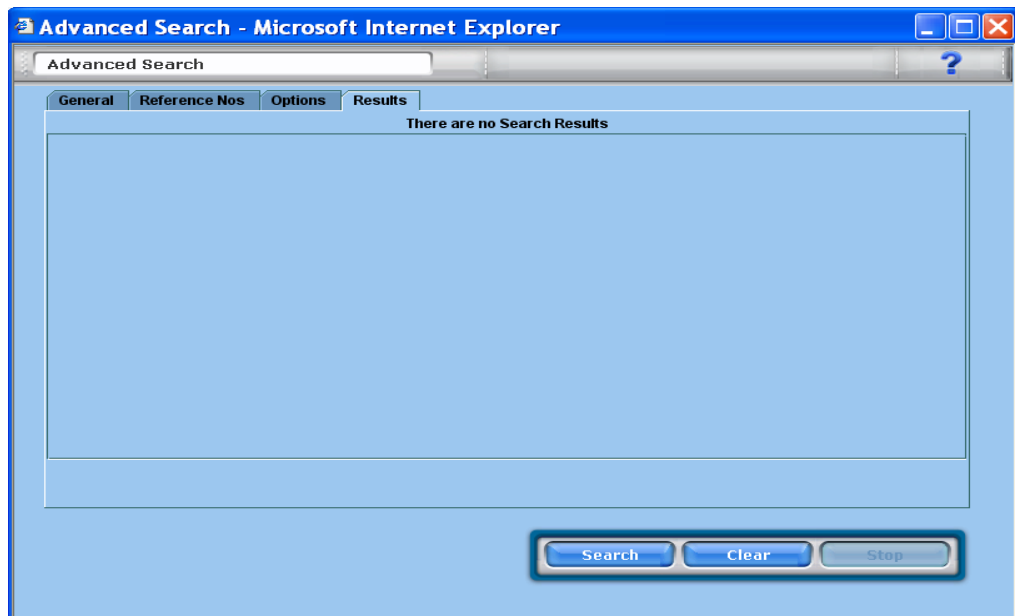


Figure 9: Advanced Search Return No Results

If **only one** record matches your search criteria, click on the customer name and you will be taken to the Customer Overview Window.

When **multiple** records (less than 100) are returned, you will see all of the records that match your search. If your search returned **more than 100** records, you will get the message **Only 100 matching customer names shown (See Figure 6)**. If that occurs, it is best to refine your search and try again.

There will be times when, after entering an account number, you will receive multiple matches. This is because the customer has different premises listed with the same account. Let us explore this scenario.



Multiple Premises for the Same Customer

A single customer may have multiple premises or, more likely, the customer has one premise and an extra service, such as a guard light, at the same address. In that situation, you will see what looks like two identical records. There will be a drop down menu available for all multi-premise customers. Single premise customers will not have a drop down menu.

Peace Premise Details

Consumer: BLAIR'S TRANSMISSION Premise: (1142178) 405 W TEXAS ST, MESQUITE, TX Status: Current from 06/13/2003

Credit Rating : 0 Total bal: 0.29 Days old:\$1752.46 60 or more Days Old:\$0.00

Premise	1142178	(1142178) 405 W TEXAS ST, MESQUITE, TX	Z1142178
Address	405 W TEXAS ST, MESQUITE, TX 75149-4243		
County	DALLAS, TX		
Access			
Description		Company	Direct Energy Texas
Occupancy	Owner	Division	EAT
Connect Date	02/28/2003	Branch	TXU
Disconnection Date		Network Charge Per	
Round	832	Sequence	271
Secondary Round		Secondary Sequence	
Lot #			
Job #	9409	Work Day	1
GIS Reference		Sales Territory	
Key			
Meter Location Info		Safety Switch Status	
Rural Fire #		Substation	0000
Network	ZY - Default Network Code	Deposited Plan #	
Reticulation		Depot	0 - Default Depot
Main		Comm. Lights Total	0
Facilities Ref.		Comm. Lights Active	0
Altitude	0 ft		

Figure 10: Multi-Premise Account



If it is the main home account, the description field is blank.

Peace Premise Details

Overview Customer Actions Premise Pricing Readings Payment Collection

(1069265) JUAN C PONCE
 Consumer: JUAN C PONCE
 Credit Rating : 0
 Premise: (1064695) 1515 HILLCREST DR, ARLINGTON, TX 76010-4709
 Status: Current from 01/20/2003
 Total balance : \$88.00
 0.29 Days old:\$88.00 60 or more Days Old:\$0.00

Premise	1064695	Old Premise #	Z1064695
Address	1515 HILLCREST DR, ARLINGTON, TX 76010-4709		
County	TARRANT, TX		
Access			
Description		Company	Direct Energy Texas
Occupancy	Owner	Division	EAT
Connect Date	12/05/2002	Branch	TXU
Disconnection Date		Network Charge Per	
Round	799	Sequence	378
Secondary Round		Secondary Sequence	
Lot #			
Job #	9349	Work Day	1
GIS Reference		Sales Territory	
Key			
Meter Location Info		Safety Switch Status	
Rural Fire #		Substation	0000
Network	ZY - Default Network Code	Deposited Plan #	
Reticulation		Depot	0 - Default Depot
Main		Comm. Lights Total	0
Facilities Ref.		Comm. Lights Active	0
Altitude	0 ft		

Market/Model

Market	Utility	Model	Start Date	End Date
Tx Elec	Electricity	Retail Consolidated Bill Ready	01/20/2003	

Display all Billing Market Models

External References

Utility	Role	Market Participant	Start Date	End Date	External Code
Electricity	Texas Utility Account Number	Null	12/05/2002		4223068980
Electricity	Cleaning House	CH - ERCOT (63529049)	12/05/2002		
Electricity	Sign Date	CUSTOMER SIGN	12/05/2002		2002-11-26
Electricity	Direct Energy Payroll System	AGENT IDENTIFER	12/05/2002		194499
Electricity	Electric Service Identifier	ESID - Permanent ESI ID	12/05/2002		10443720004229068
Electricity	Retail Electric Provider	REP - Direct (039713354)	12/05/2002		

Figure 11: Premise Details Window

You can see the difference between the records by choosing each account in the drop down menu and you will be automatically taken to the Premise Details Window.

Peace Premise Details

Overview Customer Actions Premise Pricing Readings Payment Collection

(1136350) BLAIR'S TRANSMISSION
 Consumer: BLAIR'S TRANSMISSION
 Credit Rating : 0
 Premise: (1142178) 405 W TEXAS ST, MESQUITE, TX 75148-243
 Status: Current from 06/13/2003
 Total balance : \$1752.46 60 or more Days Old:\$0.00

Premise	1142178	Old Premise #	Z1142178
Address	405 W TEXAS ST, MESQUITE, TX 75148-243		
County	DALLAS, TX		
Access			
Description		Company	Direct Energy Texas
Occupancy	Owner	Division	EAT
Connect Date	02/28/2003	Branch	TXU
Disconnection Date		Network Charge Per	
Round	832	Sequence	271
Secondary Round		Secondary Sequence	
Lot #			
Job #	9409	Work Day	1
GIS Reference		Sales Territory	
Key			
Meter Location Info		Safety Switch Status	
Rural Fire #		Substation	0000
Network	ZY - Default Network Code	Deposited Plan #	
Reticulation		Depot	0 - Default Depot
Main		Comm. Lights Total	0
Facilities Ref.		Comm. Lights Active	0
Altitude	0 ft		

Figure 12: Multi-Premise Account

Exercise: Understanding Search Results



Directions: Using the account numbers that you located, perform a search.

What do you know about this account from your search?

Search now using the next account number.

Write the account number here _____

What do you know about this account from your search?

Remember This

What do you want to remember about this search?



Search Components

Now that you have searched for and accessed an account, you need to understand what you are seeing.

Identifier	Premise	Name	Address	Status
3054372	3084184	SMITH, MR ROBERT D	834 W 24TH ST HOUS...	Current from 05/26/2006
3054372	3084185	SMITH, MR ROBERT D	834 1/2 W 24TH ST H...	Current from 05/26/2006
3026847	3055988	SMITH, JAMES DAVID	1 RR 1BOX 76 H BARN...	Current from 06/19/2006

Figure 13: Search Results Components

The search results pane contains the following columns:

Identifier - this field lists the customer account number

NOTE: The Customer, Name and Address fields are links that, when clicked, will take you into other windows of *Peace*.

Premise – Service Location Number

Name – this field gives you the name of the customer

Address – this field lists the service address of the property – the address where the electricity is delivered

Status – this field tells you what the account status is:

Current from - means that the customer has been at the premise since the date listed.

Future from - means that the customer is going to move into the premise as of the future date listed. At that time, the status will change to 'Current from'.

Vacant – means the customer no longer has service with us at this location.

Lesson 3

The Components of the *Peace* Window



Peace is relatively easy to navigate because there are certain items you will find in every window.



Figure 14: Peace Customer Care Menu Buttons

Main Menu - No matter which area of *Peace* you are viewing, you can see the main menu on the top of the window (see figure 12). You can access any of the menu options by moving your cursor over the menu name and clicking once with the left mouse button.

NOTE: These menu options are also called buttons.

The name of the menu that you are currently accessing will appear at the top of the window, and it will be highlighted on the main menu. Notice that 'Customer Care' is the selected menu item in this example.

Common Area - This area at the top of the window shows account information and the particular customer that you are reviewing. No matter where you are in *Peace*, you will see this common thread in every menu option.

(10899) BARRY SMITH Consumer: BARRY SMITH Credit Rating : 1	Premise: (1899) 625 WILLOW ST, HURST, Total balance : \$334.00	Status: Current from 04/29/2002 0-29 Days old:\$334.00 60 or more Days Old:\$0.00
---	---	---

Figure 15: Common Area

Static Area – This area is located in the center of the window and contains detailed account information that changes with each tab.

Phone No	817-265-7826
Password	0430
Postal address	625 WILLOW ST, HURST TX 76053-5535
Birthday	04/30/1969
Latest account due date	02/25/2008
Customer Groups	Agent Door to Door Marketing
Premise	1899, 625 WILLOW ST, HURST, TX 76053-5535
Equal Payment Plan Customer	Utility Charges \$1369.37 Installments \$1108.00 Diff \$261.37 Other \$803.59cr EPP Amt \$334.00
Service Delivery Point 893359	MET-MTRD reference 036678597GE

[Previous Premises](#)

Figure 16: Static Area



Transactions Area – This is the area at the bottom of the window and it lists every transaction that has occurred with an account both pending and completed. You will usually have to scroll down to see every transaction.

Transactions include financial transactions, notes, payment arrangements, payment plans, statements, payments, credits, PTJs, deposits, deposit interest, etc. This is a great place to begin scanning the account!

NOTE: Because *Peace* is web-based, it acts the same as any website. Throughout the system, you will see links that allow you to jump to another area. Usually, the link that you select will open additional information about that specific item. Links are the **blue** colored text.

Date	Ref	Description	Amount	Statement#	Status
06/05/2008	sato resea				
06/05/2008		204343123 Letter Writing: TX Res Pay Arrgmt			Logged
06/05/2008		204343117 EDI B14 Otbnd Drop: MYOUT Standard: E 1 (Premise 1899)		Normal	Queued to Transmit
06/05/2008		204343108 Letter Writing: TX Res Pay Arrgmt			Logged
06/05/2008		204343104 Account Maintenance: Pay Arrangmnt Added: Arrangement Expiring 09/13/2008			Completed
06/05/2008		204343096 Account Maintenance: Pay Arrangmnt Delete: Payment Arrangement Deleted			Completed
06/05/2008		204343095 Drop: Gen Drop Move Out (Premise 1899)			Logged
06/05/2008		204343091 Account Maintenance: Pay Arrangmnt Added: Arrangement Expiring 04/04/2008			Completed
04/07/2008		Normal Renewals process will NOT apply to this customers			
04/07/2008		Normal Renewals process reinstated for customers premise.			
04/07/2008		Normal Renewals process will NOT apply to this customers			
04/07/2008		Normal Renewals process reinstated for customers premise.			
04/07/2008		Normal Renewals process will NOT apply to this customers			
04/07/2008		Choicepay payments received on Monday, 12-31-07 were			
04/07/2008		HELP DESK: *agent ci to see if cust was still on app advised			
04/07/2008		RELATIONSHIP - Spouse			
04/07/2008		MEDIA			
03/02/2008		32785946 5 Days Past Due Statement # 32785946			Normal
02/01/2008		32826408 Electricity Invoice Unpaid due 02/25/2008 (Premise 1899) (PDF)	Tax	\$81.44	32785946
02/01/2008		6223906 SM Journal - EPP Smoothing Journal		\$252.56	32785946
01/31/2008		305888610 Cash Receipt - CQ		\$258.00	32785946

Figure 17: Transaction Area

Customer Menu



When you click either the Customer account number or the Name from the Search Results pane, it defaults to the Customer Overview window. Let us look at what is contained in each tab in the Customer Overview window.

Customer Overview

The screenshot shows the 'Peace' Customer Overview window for customer (10899) BARRY SMITH. The interface includes a navigation bar with tabs for Overview, Customer, Actions, Pricing, Readings, Payment, and Collection. Key account information is displayed, including the consumer name, credit rating, phone number, and total balance of \$334.00. A table below lists various transactions with columns for Date, Ref, Description, Amount, and Statement/Status.

Date	Ref	Description	Amount	Statement/Status
06/05/2008		204343123 Letter Writing TX Res Pay Argmt		Normal Queued to Transmit
06/05/2008		204343117 EDI 914 Otrnd Drop: MvOUT Standard: E 1 (Premise 1899)		Normal Queued to Transmit
06/05/2008		204343100 Letter Writing TX Res Pay Argmt		Normal Queued to Transmit
06/05/2008		204343104 Account Maintenance: Pay Arrangmnt Added: Arrangement Expiring 09/13/2008		Completed
06/05/2008		204343096 Account Maintenance: Pay Arrangmnt Deleted: Payment Arrangement Deleted		Completed
06/05/2008		204343096 Drop: Gen Drop Move Out (Premise 1899)		Normal Queued to Transmit
06/05/2008		204343091 Account Maintenance: Pay Arrangmnt Added: Arrangement Expiring 04/04/2008		Completed
04/07/2008		Normal Renewals process will NOT apply to this customers		
04/07/2008		Normal Renewals process reinstated for customers premise.		
04/07/2008		Normal Renewals process will NOT apply to this customers		
04/07/2008		Normal Renewals process reinstated for customers premise.		
04/07/2008		Normal Renewals process will NOT apply to this customers		
04/07/2008		Choicepay payments received on Monday ,12-31-07 were		
04/07/2008		HELP DESK **agent ct to see if cust was still on app advised		
04/07/2008		RELATIONSHIP - Spouse		
04/07/2008		MEDIA		
03/02/2008		32785946 5 Days Past Due Statement # 32785946		Normal
02/01/2008		32926408 Electricity Invoice Unpaid due 02/25/2008 (Premise 1899) (PDF)	Tax	\$81.44 32785946
02/01/2008		6223906 SM Journal - EPP Smoothing Journal		\$252.56 32785946
01/31/2008		305888610 Cash Receipt - CQ		\$258.00 32785946
01/04/2008		32616753 Electricity Invoice due 01/29/2008 (Premise 1899) (PDF)	Tax	\$171.50 32478122

Customer Overview is one of the main windows in *Peace*. It provides an overview of the account.

As you can see, this window contains all of the components mentioned earlier in this lesson – the main menu, common area, static area, transactions area and tabs.



Customer Overview Financial Window

Just as you would imagine, the Financial window shows you specific financial information for the account. Anything that refers to money will show here.

This window is laid out very similar to the Overview window. There is a static area at the top and a transaction area at the bottom that you can scroll.

The screenshot displays the 'Peace Financial History' window for customer BARRY SMITH. The interface includes a navigation bar with tabs for Overview, Customer, Actions, Premise, Pricing, Readings, Payment, and Collection. Account details include the consumer name, premise address (1899 625 WILLOW ST, HURST), and a total balance of \$334.00. A summary table on the right shows the Statement Balance, Statement Date (02/01/2008), and Total Balance (\$334.00), along with a breakdown of days old and EPP amounts.

Below the summary is a filter section with 'From Date' (06/07/2007) and 'To Date' (06/06/2008) dropdowns, and buttons for Filter, Clear Filter, and Advanced Filter. The main area is a ledger table with columns for Date, Ref, Description, Stmt, Unalloc, Amount, and Balance. The transactions are listed in chronological order from oldest at the bottom to newest at the top.

Date	Ref	Description	Stmt	Unalloc	Amount	Balance
02/01/2008	32926408	Electricity Invoice (Premise 1899) (PDF) (XML)	32785946	81.44	81.44	334.00
02/01/2008	6223906	SM EPP Smoothing Journal	32785946	252.56	252.56	252.56
01/31/2008	305888610	Cash Receipt - CO	32785946		258.00	0.00
01/04/2008	32616753	Electricity Invoice (Premise 1899) (PDF) (XML)	32478122		171.50	258.00
01/04/2008	6103523	SM EPP Smoothing Journal	32478122		86.50	86.50
01/02/2008	303220100	Cash Receipt - CP	32478122		216.00	0.00
11/30/2007	32309841	Electricity Invoice (Premise 1899) (PDF) (XML)	32173176		145.22	216.00
11/30/2007	5962024	SM EPP Smoothing Journal	32173176		112.78	70.78
10/30/2007	32001659	Electricity Invoice (Premise 1899) (PDF) (XML)	31866827		167.62	42.00
10/30/2007	5860362	SM EPP Smoothing Journal	31866827		90.38	209.62
10/22/2007	296619940	Cash Receipt - CP	31866827		300.00	300.00
10/09/2007	5595357	SM Smooth Current Balance	31866827		803.59	0.00
10/01/2007	31892367	Electricity Invoice (Premise 1899) (PDF) (XML)	31559506		287.35	803.59
10/01/2007	5679799	U Interest charged on overdue amount	31559506		23.71	516.24
09/25/2007	294029730	Cash Receipt - CP	31559506		300.00	492.53
08/30/2007	291340480	Cash Receipt - CO	31219172		193.00	792.63
08/30/2007	31350192	Electricity Invoice (Premise 1899) (PDF) (XML)	31219172		338.48	975.53
08/30/2007	5484524	U Interest charged on overdue amount	31219172		18.30	637.05
08/30/2007	5484523	WS EPP Wash up charge	31219172		236.75	618.75
07/31/2007	30892957	Electricity Invoice (Premise 1899) (PDF) (XML)	30863984		301.01	382.00
07/31/2007	5177199	SM EPP Smoothing Journal	30863984		118.01	80.99

Figure 18: Financial History Window

The transaction area on the Financial window is a ledger card. It shows all of the debits and credits for the account. The easiest way to read this is from bottom to top so you see the oldest transactions first.



Customer Overview Collections Window

As you see from the example below, the Collections window is broken into two major components - current credit and collections information and Credit Control Events.

Peace Collection History

Overview Customer Actions Premise Pricing Readings Payment **Collections**

(10899) BARRY SMITH
 Consumer: BARRY SMITH
 Credit Rating : 1
 Premise: (1899) 625 WILLOW ST, HURST,
 Total balance : \$334.00
 Status: Current from 04/29/2002
 0-29 Days old:\$334.00 60 or more Days Old:\$0.00

Account Status	Normal Account	Credit Action	Special Arrangements
Total Balance	\$334.00	Oldest Debt Due Date	02/25/2008
0 - 29 Days Old	\$334.00	Credit Rating	1 out of 4
30 - 59 Days Old	\$0.00		
60 or more Days Old	\$0.00		
Current Payment Arrangement exists		Uninvoiced Charges	\$0.00
Unprocessed Cash	\$0.00		

Collections Action Timeline

February

Credit Events
 Payment Plans
 Payment Arrangements

Next Anticipated Event: Special Arrangements in place of next anticipated credit event
 Current Cycle: Standard Residential Cycle Type: Ayears
 Current Deferred Plan Payment Arrangement from 01/02/2008 to Sep 13, 2008

Credit Control Events

Date	Event	Notes	Amount	Status
03/02/2008	5 Days Past Due	LATE PAYMENT		334.00 Normal
12/30/2007	5 Days Past Due	LATE PAYMENT		216.00 Normal
10/03/2007	Pending Disconnection	FTC Pending Drop		492.53 Normal
09/24/2007	DNP Notice(Standard)	FTC Drop Warning		792.53 Normal
08/31/2007	5 Days Past Due	LATE PAYMENT		199.00 Normal
08/30/2007	Reminder Notice	REMINDER		199.00 Normal
07/31/2007	5 Days Past Due	LATE PAYMENT		199.00 Normal
07/04/2007	Reminder Notice	REMINDER		193.00 Normal
07/01/2007	5 Days Past Due	LATE PAYMENT		193.00 Normal
06/03/2007	5 Days Past Due	LATE PAYMENT		196.94 Normal
12/23/2002	DNP Notice(Standard)	CUT OFF		321.23 Normal

Figure 19: Collections History Window

Listed within the Credit tab is all collection activity that has occurred on the account. If a customer is behind in payments, the actions that have been taken will be listed in the Credit Control Events area.

An account that has a **good** payment history does **not** have a Credit Control Events section. Accounts like the one above, who made a number of late payments and received some disconnect notices; do have a Credit Control Events section.

NOTE: As you will see when we get to the Credit and Collections portion of training, Direct Energy, like most energy providers, disconnects customers who fail to pay their bills.



Customer Overview: Usage History

The Usage window displays electricity usage per month. The pathway to view Usage: **Customer Overview/Overview/Usage**

Figure 22: Usage Path

Date	Days	Consumption	Daily Avg	Reading	Read Type	Read Method	Reversed	Invoice
01/30/2008	30	507.0		16.90	507	Actual		32826408
12/31/2007	33	1106.0		33.52	1106	Actual		32616753
11/08/2007	33	931.0		28.21	931	Actual		32309941
10/26/2007	28	1080.0		38.57	1080	Actual		32001659
09/28/2007	31	1876.0		60.52	1876	Actual		31692367
08/28/2007	29	2216.0		76.41	2216	Actual		31360192
07/30/2007	31	1967.0		63.45	1967	Actual		30992957
06/29/2007	30	1785.0		59.50	1785	Actual		30669925
05/30/2007	32	1364.0		42.63	1364	Actual		30284587
04/28/2007	30	781.0		26.03	781	Actual		29923807
03/29/2007	29	882.0		30.42	882	Actual		29546653
02/28/2007	29	649.0		22.38	649	Actual		29154660
01/30/2007	28	561.0		20.04	561	Actual		28772254
01/02/2007	32	666.0		20.81	666	Actual		28396769
12/01/2006	31	738.0		23.81	738	Actual		27903540
10/31/2006	29	909.0		31.34	909	Actual		27174399
10/02/2006	32	1448.0		45.25	1448	Actual		26487003
08/31/2006	30	2021.0		67.37	2021	Actual		25721073
08/01/2006	32	2180.0		68.13	2180	Actual		24962522
06/30/2006	29	1481.0		51.07	1481	Actual		24266023
06/01/2006	30	1306.0		43.53	1306	Actual		23604767
05/02/2006	32	1059.0		33.09	1059	Actual		22988840
03/31/2006	30	659.0		21.93	659	Actual		22386191
03/01/2006	29	562.0		20.07	562	Actual		21789678
01/31/2006	28	578.0		20.64	578	Actual		21170088
01/03/2006	32	1040.0		32.50	1040	Actual		20623950
12/02/2005	31	752.0		24.26	752	Actual		20030703
11/01/2005	29	844.0		29.10	844	Actual		19363204
10/03/2005	32	1792.0		56.00	1792	Actual		18657508
09/01/2005	30	1886.0		62.87	1886	Actual		18194858
08/02/2005	32	1979.0		61.84	1979	Actual		17572502
07/01/2005	29	1674.0		57.72	1674	Actual		17024758
06/02/2005	31	1244.0		40.13	1244	Actual		16479652

Figure 23: Usage History Window

NOTE: This tab comes in handy when researching a complaint about a high bill.

In the Usage window you can view the reading date, the amount of electricity used (consumption), the number of days that are in each service period, the average amount of electricity used each day of the service period and the invoice number on which the consumption information appears.

Lesson 5

Customer Menu



The Customer Details menu allows you to perform updates or maintenance on an account. You may have to update a phone number, postal address or some other piece of information. Let us take a look at each tab in the Customer Details menu option.

Customer Menu: Customer Tab

The Customer tab displays general information about the customer. When you verify account information with the customer, you will use this window.

Peace Customer Details

Overview Customer **Actions** Premise Pricing Readings Payment Collection

(10899) BARRY SMITH
 Consumer: BARRY SMITH
 Credit Rating : 1

Premise: (10899) 625 WILLOW ST, HURST,
 Total balance : \$334.00

Status: Current from 04/29/2002
 0.29 Days old:\$334.00 60 or more Days Old:\$0.00

Customer Consumer

Customer Type	DOMESTIC	Company	Direct Energy Texas
Customer Tax Type		Branch	TXU
Consumer Type	DOMESTIC		
Name	BARRY SMITH		
Addressee			
Home Phone	817-265-7826	Work Phone	
Mobile Phone		Fax	
Email			
Preferred Language	English	Customer Groups	Agent Door to Door Marketing
Date of Birth	04/30/1969	Password	0430
Drivers Licence		Occupation	TXU30-005401
Tax ID - SSN	***-**-4214	Employer	
Dog Owner	No	Life Support	No
Phone Day Before	No	Summarize Invoice Items	No
Aggregation Level	Premise	Use Aggregated Rates	Yes
Account Status	Normal Account	Credit Action	Special Arrangements
Rating	ZERO	Cycle Group	Default
Statement Cycle	Generated with Energy invoices	Statement Synch	12/31/2007
Special Discount	Default Special Discount	Prompt Payment Discount	
Payment Period		Payment Method	Cash
Apply Service Fee to Credit Card Payment			Yes
Account Manager		Sales Team	
Bank Account		Summarize on Overview	No
Last Statement	02/01/2008	First Residence Date	
Overview Display Profile		Standing Charge	

[Add an Online Self Service Account](#)

Statements are sent via Post to Premise

[Update](#)

Supply Details				
Premise	Supply Request Date	Status	Utility	Application #
10899	04/29/2002	Current	Electricity	

Figure 24: Customer Details

You can change information in this tab.

NOTE: You will learn how to do that later in the training.



Customer Menu: Consumer Tab

If the account is set up as a Commercial or Industrial customer, you may find additional information in this tab about the company and the service class; however, it is often left blank.

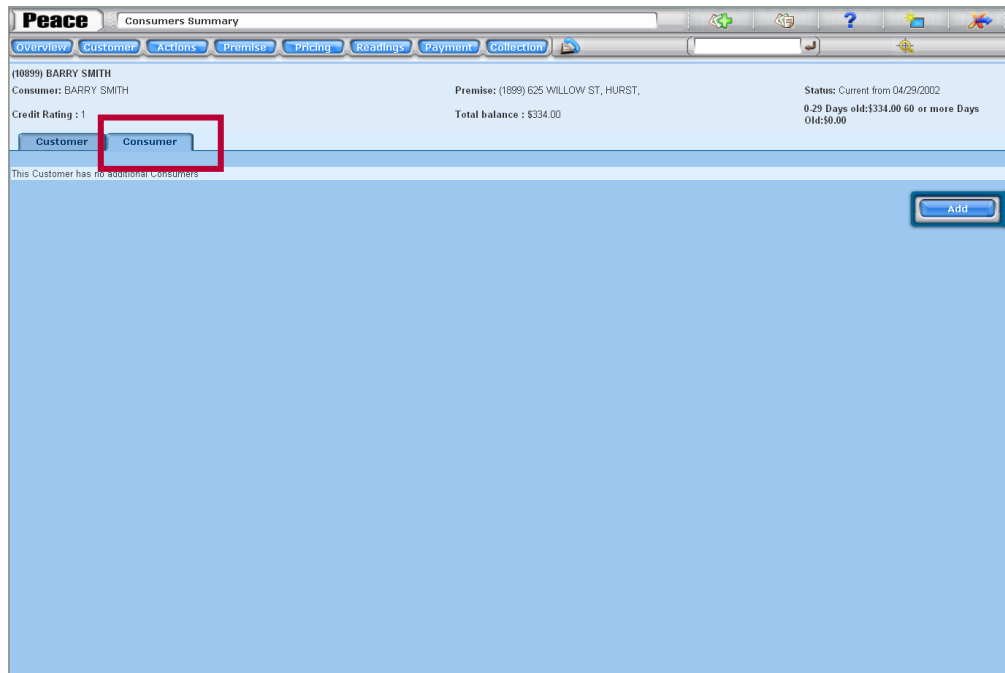


Figure 25: Consumer Tab



Customer Menu: Notes Option

The Notes option displays a history of notes made by Back Office agents, CSO or escalations while updating a customer account. During each telephone call with the customer, you will use the Log a Process menu option to log notes. We will review the Log A Process menu later.

The pathway to view Notes: **Customer Overview/ Customer/Notes**

The screenshot shows the 'Peace' application interface. The top navigation bar includes 'Overview', 'Customer', 'Actions', 'Promise', 'Pricing', 'Readings', 'Payment', and 'Collection'. The 'Customer' menu is expanded, and 'Notes' is selected. The main content area displays customer information for (1181534) CAS, including a list of addresses, phone numbers, and service details. A 'Filter' button is visible at the bottom right.

Figure 26: Notes Path

The screenshot shows the 'Peace' application interface for the 'Notes' window. The top navigation bar is the same as in Figure 26. The main content area displays customer information for (10899) BARRY SMITH. Below this, there is a table titled 'Customer Notes' with the following data:

Number	Type	Date Created	Created By	Last Changed Date	Last changed by	Note
26550818	General Note	06/06/2008 12:42:43	train01	06/06/2008 12:42:43	train01	sata reaaa
25791121	General Note	01/03/2008 00:00:00	system	04/07/2008 15:26:56	CONVERSION	Choicepay payments received on Monday, 12-31-07 were not processed and applied to customer accounts until Wednesday, 01-02-08
25789244	General Note	10/08/2007 00:00:00	kthomas2	04/07/2008 15:26:56	CONVERSION	HELP DESK: **agent ci to see if cust was still on epp advised agent that it was canceled on 05/07 because of over due bal advised agent that cust needs to pay the disconnect amount of 492.53 to keep from being disconnected and once the pymt of 492.53 post to the acct cust can be put back on epp. kthomas/enn hd/10/08/07 ra
25747346	General Note	02/01/2002 22:28:26	system	04/07/2008 15:26:56	CONVERSION	RELATIONSHIP - Spouse
25745810	General Note	01/18/2002 13:15:51	system	04/07/2008 15:26:56	CONVERSION	MEDIA

Below the table, there is an 'Update' button and a section for 'System Generated Customer Notes' which states: 'There are no System Generated Customer Notes for this Customer'.

Figure 27: Notes Window



Customer Menu: Address Option

Often customers prefer to have their bills and other correspondence sent to an address other than the premise address. This alternate address is called a *postal address* or *billing address*. To add a postal or billing address, click the Add button.

The path to Addresses: **Customer Overview/Customer/Addresses**

Figure 28: Address Path

To change the billing address, click the Add button to input the new information.

Figure 29: Address Change/Add



Customer Menu: Contacts Option

Contacts are the authorized users on the account other than the primary account holder. When you are verifying whether the person on the phone is an authorized user, refer to the Contacts window. Only the primary account holder can ask you to add a contact to the account. The contacts window will often contain no information.

The pathway to Contacts: **Customer Overview/Customer/Contacts**

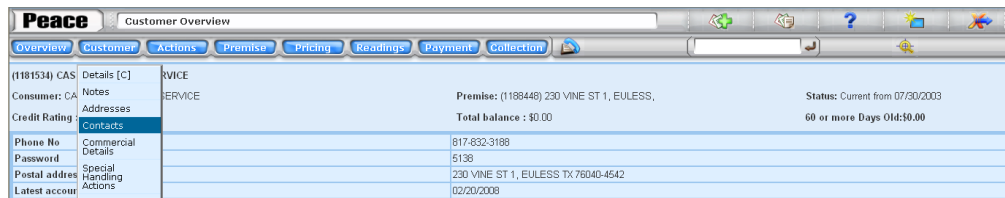


Figure 31: Contacts Path

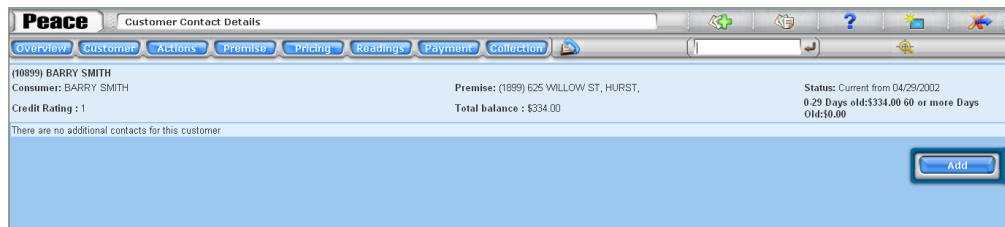


Figure 32: Customer Contacts Window

NOTE: You will learn how to add contacts in the Customer Maintenance module.

Lesson 6

Premise Menu



This menu button presents information about a specific premise. If you select the address link from the Search window, this view will open.

Premise Menu: Details Window

The Details window lists the premise information, including Market Participants and if a premise is metered or unmetered (such as with a guard light).

MarketModel						
Market	Utility	Model	Start Date	End Date		
TX Elec	Electricity	Retail Consolidated Bill Ready	05/19/2003			

External References						
Utility	Role	Market Participant	Start Date	End Date	External Code	
Electricity	Texas Utility Account Number	rel	02/27/2003		8065094641177	
Electricity	Cleaning House	CH - ERCOT (183629049)	02/27/2003			
Electricity	Sign Date	CUSTOMER SIGN	02/27/2003		2003-02-18	
Electricity	Direct Energy Payroll System	AGENT IDENTIFIER	02/27/2003		172179	
Electricity	Electric Service Identifier	ESID - Permanent ESID	02/27/2003		104437.0002270513	

Figure 33: Premise Details Window

You will also find information in the Roles column that is further defined in the External Code column. The external codes will tell you:

- ✓ ESI IDs and Program codes
- ✓ Sign date – when the customer started
- ✓ Service metered basis
- ✓ Electric 1/1 – for standard meters
- ✓ Electric 1/2 – for demand meters



Premise Menu: Notes Option

The pathway to view Premise Notes: **Premise Details/Premise/Notes**



Figure 34: Premise Notes Path

The Notes window displays all notes related to the premise. You will **never** create notes in this window.

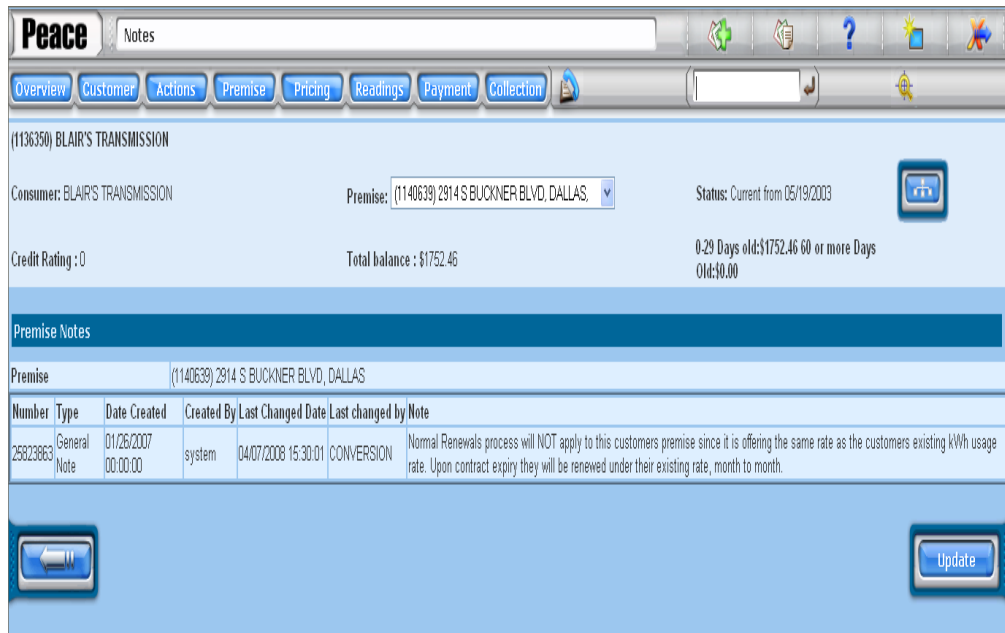


Figure 35: Premise Notes Window



Premise Menu: Tax Jurisdiction Option

The Tax Jurisdiction option displays the same tax information as the Tax Jurisdiction in the Customer Details window. The types of taxes that can be viewed are:

- City
- County
- State
- Public Utility Commission (PUC)
- Special taxes

Peace Tax Jurisdiction Details

Overview Customer Actions **Premise** Pricing Readings Payment Collection

(1136350) BLAIR'S TRANSMISSION
 Consumer: BLAIR'S TRANSMISSION Premise: (1140639) 2914 S BUCKNER BLVD, DALLAS, TX Status: Current from 05/19/2003
 Credit Rating : 0 Total balance : \$1752.46 0.29 Days old:\$1752.46 60 or more Days Old:\$0.00

Current Tax Jurisdiction Details for Premise Related Charges

Jurisdiction Type	Jurisdiction	Date Effective From	Date Effective To	Exempt	Defined at
City	DALLAS	01/01/1997		N	City
Gross Receipts Tax	GRT > 9,999	01/01/2002		N	City
County	Dallas, TX	02/27/2003		N	Premise
PUC Tax	PUC TAX	01/01/2002		N	State
State	TEXAS STATE TAX	01/01/1999		N	State
Transit Tax	DALLAS MTA	01/01/2002		N	City

Add

Figure 36: Tax Jurisdiction Window



Premise Menu: Process History Option

The Process History window displays only the PTJs for a specific premise. If the customer has multiple premises, you will want to view all of the PTJs from the Customer Overview section.

Peace Process History						
Overview Customer Actions Premise Pricing Readings Payment Collection						
(10899) BARRY SMITH		Premise: (1899) 625 WILLOW ST, HURST,		Status: Current from 04/29/2002		
Consumer: BARRY SMITH		Total balance : \$334.00		0.29 Days old:\$334.00 60 or more Days Old:\$0.00		
Credit Rating : 1						
Process Tracking Jobs						
Type/Class	Notes	Status	Assigned To	Logged Date	Date Required	
EDI 814 Otbnd Drop : MVOUT Standard : (Premise 1899)		Queued to Transmit		06/05/2008	06/11/2008	
Drop : Gen Drop Move Out : (Premise 1899)		Logged		06/05/2008	06/06/2008	
Credit & Collections : Collections Contact : (Premise 1899)	Left Message	Completed		10/09/2007		
Elec Complaint : Elec Complaint : (Premise 1899)	[10/9/2007 [ECHOUSER] ECHO Com...	In Progress	Customer Solutions	10/09/2007		
Customer Inquiry : Billing Inquiry : (Premise 1899)	BARRY SMITH CI ABOUT HIS ACCT...	Completed		10/09/2007		
Credit & Collections : No Contact : (Premise 1899)	No Answer	Completed		10/08/2007		
Credit & Collections : No Contact : (Premise 1899)	No Answer	Completed		10/06/2007		
Credit & Collections : No Contact : (Premise 1899)	Busy	Completed		10/05/2007		
Credit & Collections : No Contact : (Premise 1899)	No Answer	Completed		10/04/2007		
EDI 650 Otbnd SO : Disconn - Non Pay : (Premise 1899)		Cancelled		10/03/2007	10/03/2007	
Credit & Collections : No Contact : (Premise 1899)	No Answer	Completed		10/03/2007		
Credit & Collections : No Contact : (Premise 1899)	No Answer	Completed		10/01/2007		
Credit & Collections : No Contact : (Premise 1899)	No Answer	Completed		09/29/2007		
Credit & Collections : Collections Contact : (Premise 1899)	Left Message	Completed		09/25/2007		
Credit & Collections : No Contact : (Premise 1899)	No Answer	Completed		09/24/2007		
Credit & Collections : TX Fast Track Credit : (Premise 1899)		Completed		09/23/2007		
Credit & Collections : No Contact : (Premise 1899)	No Answer	Completed		09/22/2007		
Credit & Collections : No Contact : (Premise 1899)	No Answer	Completed		09/21/2007		
Credit & Collections : No Contact : (Premise 1899)	No Answer	Completed		09/20/2007		
Credit & Collections : No Contact : (Premise 1899)	No Answer	Completed		09/19/2007		
Credit & Collections : No Contact : (Premise 1899)	No Answer	Completed		09/18/2007		
Credit & Collections : Collections Contact : (Premise 1899)	Left Message	Completed		09/14/2007		
Credit & Collections : Collections Contact : (Premise 1899)	Left Message	Completed		09/10/2007		
Elec Complaint : Elec Complaint : (Premise 1899)	[9/8/2007 [ECHOUSER] ECHO Comp...	Completed	Customer Solutions	09/08/2007		
Account Maintenance : EPP Set Up : (Premise 1899)	Customer not eligible for EPP...	Completed	BILLING TEXAS	09/08/2007		
Credit & Collections : Collections Contact : (Premise 1899)	Left Message	Completed		09/05/2007		
Credit & Collections : Collections Contact : (Premise 1899)	Left Message	Completed		09/01/2007		
Account Maintenance : EPP Cancel : (Premise 1899)	Non Payment cancel EPP...	Completed	Credit and Collections	08/30/2007		

Figure 37: Process History Window

Lesson 7

Other Menu Options



Readings: Reading Entry Option

Within the Readings menu option, the only option you will use is the Reading Entry. The Reading Entry window displays readings that have been received from the Transmission and Distribution Service Provider (TDSP).

The pathway to Reading Entry: **Customer Overview/Readings/Reading Entry**

The screenshot shows the 'Peace' Customer Overview page for customer (1181534) CASEYS WRECKER SERVICE. The 'Readings' menu is expanded, highlighting 'Reading Entry (R)'. Other menu items include Reversal Entry, Multiple Reversals, Multiple Rebill, Special Charges, Amendments, Preview Invoice, and Reading Review. The main content area displays customer details such as phone number, password, address, and account information. At the bottom, there are date filters and buttons for 'Filter', 'Clear Filter', and 'Advanced Filter'.

Figure 38: Readings Path

The screenshot displays the 'Peace' Reading Entry window for customer (10899) BARRY SMITH. It features a 'Reading History' section with a table of readings. The table includes columns for Date, Days, Consumption, Average Consumption, Reading, Read Type, Read Method, Status, and Invoice. The data shows a series of readings from 01/30/2006 to 04/28/2007.

Date	Days	Consumption	Average Consumption	Reading	Read Type	Read Method	Status	Invoice
01/30/2006	30	507.0	16.90	507		Actual		32926408
12/31/2007	33	1106.0	33.52	1106		Actual		32616753
11/28/2007	33	931.0	28.21	931		Actual		32309941
10/26/2007	28	1080.0	38.57	1080		Actual		32001659
09/28/2007	31	1876.0	60.52	1876		Actual		31692367
08/28/2007	29	2216.0	76.41	2216		Actual		31350192
07/30/2007	31	1967.0	63.45	1967		Actual		30992957
06/29/2007	30	1785.0	59.50	1785		Actual		30659925
05/30/2007	32	1364.0	42.63	1364		Actual		30284587
04/28/2007	30	781.0	26.03	781		Actual		29823807

Figure 39: Readings Window

NOTE: Back Office personnel use the other tabs in this menu option to enter readings and correct existing readings.



Payment Plans

The Payment Plans menu option is currently used to enter Equal Payment Plans (EPPs). The pathway to Payment Plans: **Customer Overview/Payment/Payment Plans**

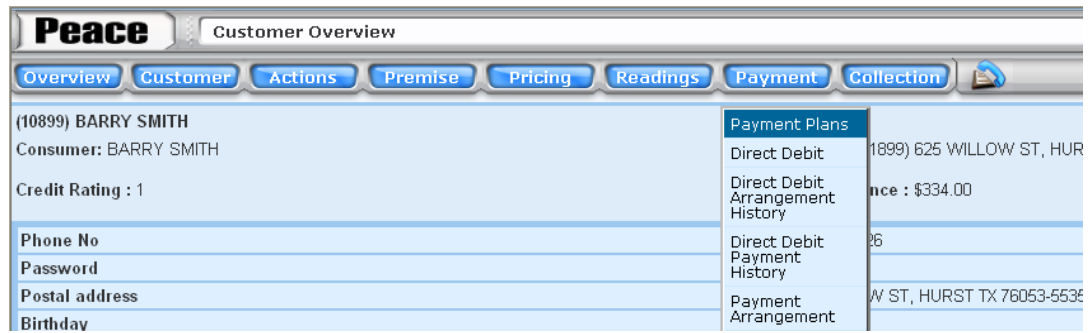


Figure 40: Payment Plans Path

Typically, you will see a blank screen, as seen in the example below, because the customer is not enrolled in an EPP.

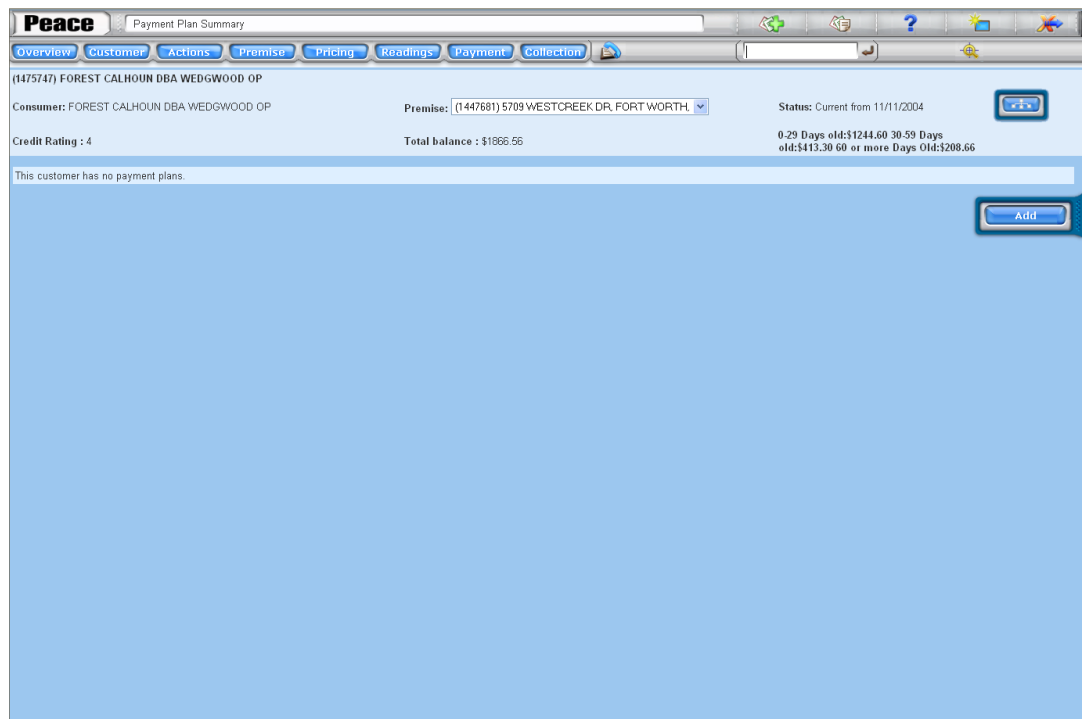


Figure 41: Payment Plan Summary without EPP



You will see a EPP window with completed information if:

- Customer had an EPP in the past
- Customer is currently on an EPP
- Customer has multiple EPPs because in prior years they changed plans

Peace Payment Plan Summary										
Overview Customer Actions Premise Pricing Readings Payment Collection										
(10899) BARRY SMITH Consumer: BARRY SMITH Credit Rating : 1			Premise: (1899) 625 WILLOW ST, HURST, Total balance : \$334.00				Status: Current from 04/29/2002 0.29 Days old:\$334.00 60 or more Days Old:\$0.00			
Current Plans										
No.	Type	Status	Premise	Date Effective	Installation Amount	Utility Charges	Installments Paid/Billed	Difference		
165277	Equal Payment Plan	Current	1899 625 WILLOW ST HURST	10/08/2007	\$334.00	\$1,369.37	4	\$1,108.00	\$261.37	
<input type="button" value="Add"/>										
Previous Plans										
No.	Type	Status	Premise	Date Effective	End Date	Installation Amount				
156153	Equal Payment Plan	Cancel	1899 625 WILLOW ST HURST	05/07/2007	08/30/2007	\$183.00				
117733	Equal Payment Plan	Washed up 05/06/2007	1899 625 WILLOW ST HURST	05/06/2006	05/06/2007	\$171.00				
52593	Equal Payment Plan	Washed up 05/05/2006	1899 625 WILLOW ST HURST	05/07/2005	05/05/2006	\$96.00				
15233	Equal Payment Plan	Washed up 05/06/2005	1899 625 WILLOW ST HURST	05/07/2004	05/06/2005	\$105.00				
2684	Equal Payment Plan	Washed up 05/06/2004	1899 625 WILLOW ST HURST	05/21/2003	05/06/2004	\$155.00				

Figure 42: Payment Plan Summary with EPP

The Payment Plan window will give you information when talking with the customer about stopping a payment plan. It will give you an idea whether the customer will owe money or if Direct Energy will owe the customer money.



Payment Arrangements

The Payment Arrangements menu option allows you to create payment arrangements for customers who have fallen behind on their payments or express an inability to pay.

The pathway to Payment Arrangements: **Customer Overview/Payment/Payment Arrangements**

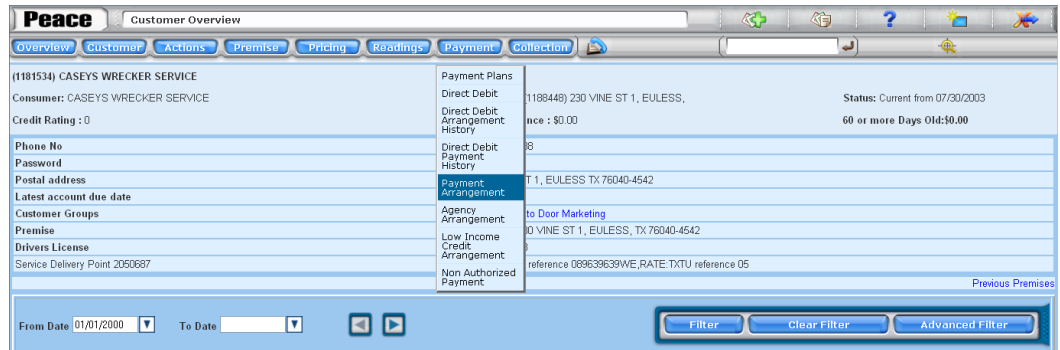


Figure 43: Payment Arrangements Path

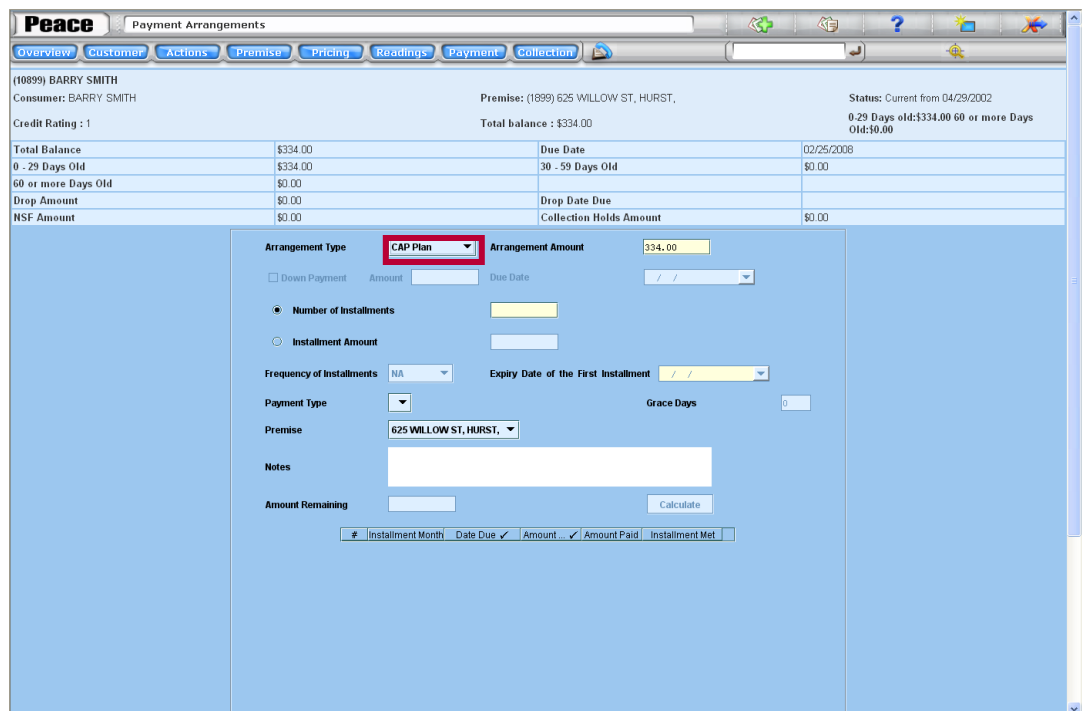


Figure 44: Payment Arrangements Window

Options in the arrangement type field are:

Deferred Payment Plan (DPP) - a formal arrangement

Extended Payment Plan (EXPP) - an informal arrangement

Exercise: Exploring Tabs



Directions: Using an account number that you previously looked up; take about 10 minutes to explore the various tabs in each of the menu options in lessons 4 through 7. Now answer the following questions:

In what Radio button and tab would you find:

1. The customer's credit rating?
2. Credit control events?
3. Postal address information?
4. Whether or not a property has a guard light?
5. Premise-related PTJs?
6. The blank PTJ form?

Module Summary



This module was designed to familiarize you with the *Peace* system.

Peace is the tool that stores the information you will need to successfully help any customer.

Now, you should be able to:

- Launch the *Peace* System
- Search for account information in *Peace*
- Recite the major components of each *Peace* window
- Use the Customer Enquiry menu to view a customer's account
- Perform updates using the Customer Maintenance menu
- Review information about the property in the Premise Enquiry menu
- Complete the setup of credit arrangements for a customer

In the days to come, you will be using *Peace* to handle specific customer requests and specific tasks.