

4 Setting Up Accounts and Meter Orders for Customers

After you enter customer information, you must add an account for the customer and create a Meter Order. Most of the information is on the customer application.

Adding New Accounts and Creating Meter Orders


You usually add a new account immediately after entering the customer's information, but you can also come back later to add the account. A customer can have more than one account as well. Whether the customer already has an account or not, you begin by displaying the customer's record.

As part of the process of adding the new account, you create and print a Meter Order.

Type	House or Plot #	Street or Locality	Additional address inform
Home Address	33	Rue Saint-Jean, Garcin, Trou Du Nord, Nord Est	Vers de Lombardo



To add a new account and create a Meter Order

1. Display the customer's record, and then click **Add Accounts**.
 - If you just finished entering the customer's information in the "Customer Information, Edit record" window, click **Save** and then click **Add Accounts**.
 - If you want to add a new account to a customer that was added previously, display the customer record in Edit mode (click the Edit icon  to open the "Customer Information, Edit record" window), and then click **Add Accounts**.

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Customer Account Information, Add new record

Customer No Angrand, Jacquelin

Tariff *

Route *

Address

Billing Address

2. Fill in the information in these fields. Fields with a red asterisk (*) are mandatory.

In this field	Select this
Tariff *	The type of electric service: <ul style="list-style-type: none"> ■ R - Residential ■ C - Commercial ■ I - Institutions ■ G - Street Lighting ■ N - NGO
Route *	The route number for the customer's electric service.
Address	Customer's address where the meter is located.
Billing Address	Customer's billing address. (Usually the same address as above.)

3. Click **Save**.

EUBS creates the customer account, and displays a message at the top that the record was added. A new set of fields becomes available for creating a Meter Order (MO).

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MO, Add new record

<<< Record was added >>>
[Edit](#) [View](#)

Customer Account	100118001089 Angrand, Jacquelin(R)		
Meter Order Number		Issue Date	4/21/2016
Size (Amps)	Please select ▼	Configuration	Please select ▼
Service Drop	<input type="text"/> Add new		
Meter	<input type="text"/>	Meter Multiplying Factor	1 ▼
Seal	<input type="text"/>	Seal Tampered	<input type="checkbox"/>
Status	Please select ▼	Status Date	<input type="text"/> ▼ <input type="text"/> ▼ <input type="text"/> ▼ *
Assigned To	Please select ▼ *		
Remarks	<input type="text"/>		

Save Back to list

4. Fill in the information in these fields. Fields with a red asterisk (*) are mandatory.

In this field	Select this
Size (Amps)	Number of amps for the electric service: <ul style="list-style-type: none"> ■ 50 Amps – this is the most common ■ 100 Amps ■ 200 Amps ■ 201-400 Amps ■ 400-1000 Amps
Configuration	Number of volts and phases for the electric service: <ul style="list-style-type: none"> ■ 120 Volts Single Phase ■ 120-208 Volts Three Phase ■ 120-240 Volts Single Phase ■ 277-480 Volts Three Phase
Status	issued_for_design
Status Date *	Current date or next day's date from the calendar.
Assigned To *	Meter Order Manager
Remarks	Enter any remarks about assigning the Meter Order.

5. Click **Save**.

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6. Click **Print Meter Order**.
EUBS displays a PDF of the Meter Order.

7. Print the Meter Order. For details, see [Printing Reports](#).

8. Click **Back to list**.

The row with the orange header shows master details for the new account. The rows below the green header show details about the Meter Orders for the account.

Customer	Account	Meter	Route	Tariff	Meter Order (MO)	Meter Status	Status	Billing Address							
Angrand, Jacquelin	100118001089		540	R- Residential	issued_for_design	not_available	new	33 Rue Saint-Jean, Garcin, Trou Du Nord, Nord Est, Vers de Lombardo							
Back to Customer Account Information															
Details found: 1											Page 1 of 1		Records Per Page: 20		
	Customer Account	Issue Date	Size (Amps)	Configuration	Service Drop	Meter	Meter Multiplier Factor	Seal	Seal Tampered	Status	Status Date	Assigned To	Remarks	Locked	Meter Order Number
	100118001089 Angrand, Jacquelin(R)	4/21/2016	30 Amps	120 Volts Single Phase			1.00		<input type="checkbox"/>	issued_for_design	4/21/2016	1 Isaac Line Crew	Go on Friday	<input type="checkbox"/>	849,237.00