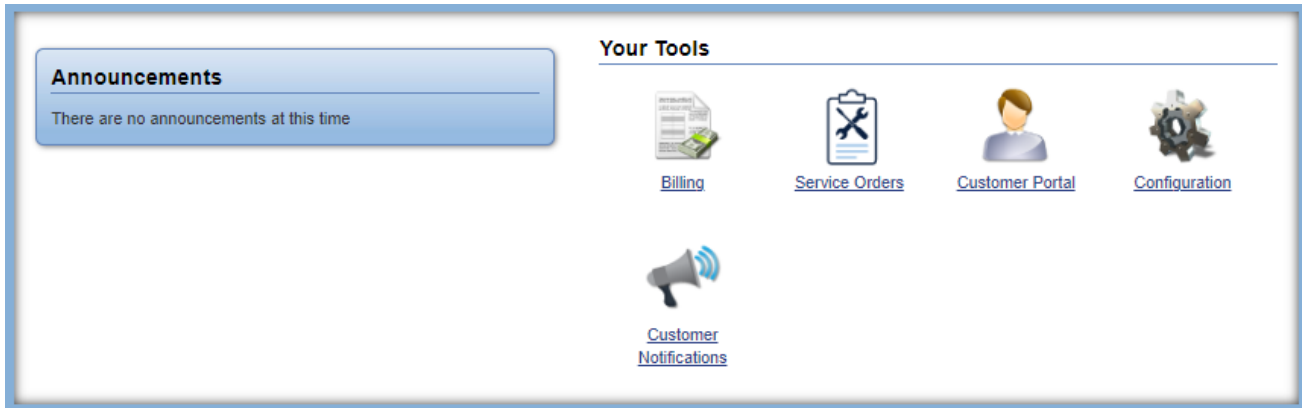


April 26, 2023 – 1PM-4:30PM (EST)

Dashboard Modules



- Announcements
- Configuration
 - Only Administrators have access to this module
- Customer Portal – *Will cover in more depth in separate session below*
- Service Orders – *Will cover in more depth in separate session below*
- Billing – *Will be covering in multiple sessions mentioned below*
- Customer Notifications – *Will cover in more depth in separate session below*



Billing Module [Billing](#)

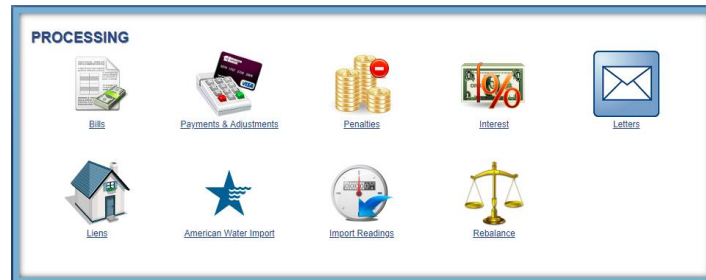
- Account search
 - Filters
 - Create new account (*only used for a brand-new service address*)
- Reviewing an account

<ul style="list-style-type: none"> ○ Account Details ○ General Information ○ Transactions ○ Balances ○ Account Log ○ Services ○ Charges ○ Portal Payments 	<ul style="list-style-type: none"> ○ Payment Method ○ Payment Plan ○ Bottom tabs <ul style="list-style-type: none"> ▪ Customers ▪ Attachments ▪ Categories ▪ Reports (<i>One-off Notices</i>) ▪ Custom Data
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- Adding an alert to an account
- Account update wizard
- Finalization (move in/move out)
- Map
- QuickCalc

- Reports (Muni-Link Commonly Suggested Reports document)

May 4, 2023 – 1PM-4:30PM (EST)

Processing



- Payments
 - Manually entering payments (single & bulk)
 - Entering Deposits
 - Lockbox Payment Import
- Adjustments
 - Entering and posting adjustments
- Bills
 - Generate bill cycles
 - Walk through entire billing process
 - Review Billing reports
- Corrected bill process
- Processing penalties
- Refunds process

May 9, 2023 – 1PM-2:30PM (EST)

Processes (Continued)

- Generating a shut off list

Service Orders

- Setting up service order task steps.
- Completing a service order

May 10, 2023 – 1PM-2:30PM (EST)

Customer Notifications

- Creating Templates and Campaigns



Customer Portal

- Customer Portal (Office View)
 - How to look up portal users
 - How to search for portal payments
- An overview of what your customers will be seeing on their side of the Muni-Link customer portal.