

CC&B Premise Manual Sample

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Acronyms/Terms

The following table defines terms and acronyms found in this module.

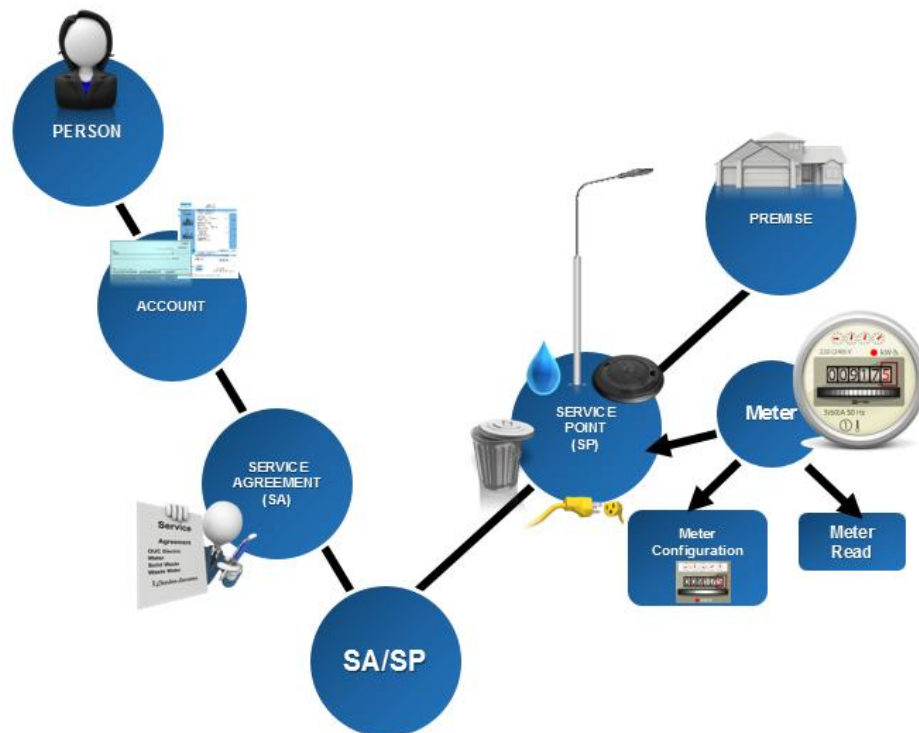
Term	Description
Meter	Meters are devices that measure consumption. The meter record includes manufacturer, model, and serial number.
Meter Configuration	Meter Configurations define the number of registers, dial information, and other attributes. Each registers' consumption is used to calculate usage for the customer and ultimately billing. A register typically captures unit of measure, time of use, number of digits left and right of a decimal point. The initial Meter Configuration is created at the same time the Meter record is created in CC&B. If the register(s) change over time, the changes are captured in a new dated Meter Configuration.
Item	Items are devices that do not measure consumption but may impact billing in some way. Items are further classified as either non-equipment items or equipment items.
Item Type	The Item Type defines the type of service and common characteristics shared by its items. The Item Type also controls the characteristics that may be specified on items of a given type. Item Types are defined on the Service Point so only valid items are installed at valid Service Point Types.
Premise	The geographic information for a service location used to store and maintain information about the address or place where service is being provided.
Premise Note	<p>Premise Notes in CC&B make use of Case Functionality. Premise Notes are used for deposit quotes, tampering, inspections, and red flag alerts for example. When the user creates the Premise Note a Case is automatically created in CC&B.</p> <p>Note and Note Subtype selections will be available along with applicable comments. Note and Note Subtype are used to include specific information for the Premise Note.</p>
Service Point (SP)	The delivery connection point for a given utility type and detailed information for a meter or non-metered items. The Service Point is used to store and maintain information about where a specific service enters the Premise – i.e. the electric meter location.
Sync Adjustment	Communication between CC&B and external systems (MDM) to synchronize Master Data. There are outbound messages to send CC&B information such as new Premise and Service Point information or updates for these objects.
MDM	Meter Data Management – An interfaced system that provides CC&B with the Meter Reads and Service Quantities needed to calculate bill charges.

1 Premise

Utility services are created at the Premise, where the Service Points, and associated Meters and/or Items are located. In this chapter we will look at a Premise in detail, its Service Points with the services it provides, and its corresponding Meters and or Items. Within each section we will discuss the physical location and hardware used, how to locate and read them, as well as, the CC&B object workbooks and information found on those pages. The user will learn what information to look for at each of these pages and how they relate to the account for analysis purposes.

The Premise and Service Point have a direct relationship, although the Premise may be created with or without a Service Point. The Service Point requires a Premise record and Service Points are needed for Service Point related Service Agreements and Fieldwork creation.

In order to begin utility service from "YOUR UTILITY", a Premise and Service Point are required in addition to Person/Account. The Premise/Service Point relationship is best illustrated with the "V" ERD. While most often created together, we will start with Premise object maintenance first and then Service Point. The Premise is highlighted in the "V" illustration below.



1.1 Premise

The Premise record is considered the "Service Address: and contains general and geographic information about the service location. Other attributes include characteristics, geographic data, meter-reader instructions, life-support/sensitive load information, taxation jurisdiction, and landlord information.

Additionally, the Premise record is used to associate or link a Landlord to a Premise. A Landlord Agreement is a record of the contract between "YOUR UTILITY" and the Landlord individual or organization acting as the Landlord. It does not include all contract details. CC&B defines the landlord's preferences for what should happen to the services once the tenant vacates the property.

While mailing addresses may exist at Person and Account, the Premise address serves as the default mailing address for all bills and correspondence generated through CC&B. The Premise address is entered in a "parsed" format and displayed in a string format on the Premise Main page.

1.1.1 The Premise Object

The Premise Object captures general information about the service location such as address, geographic location, life support, landlord ID and meter read instructions.

1.1.1.1 Navigating the Premise Object

This section details the various ways to search for and navigate the Premise object.

With the account in context at the Control Central, the Premise can then be easily accessed from any Premise context menu or hyperlink found at Control Central Account Information portal, Dashboard, Trees or other objects throughout CC&B. The images below illustrate the Control Central, Dashboard, and Premise Tree paths.

The screenshot displays the Control Central interface with the 'Premise Tree' tab selected. The 'Current Context' section shows the account information for Mears, James L. The 'Premise' field is highlighted with a red box, showing the address: 822 WALNUT ST, ORLANDO, FL, 32806-1363. Below this, the 'Customer Information (Map Zone)' section is visible, followed by a 'Bill Graph' showing ending balances and current charges over time. At the bottom, the 'SA Premise List' table is shown with three entries, each with a red box around the address field.

Premise	Current Balance	Payoff Balance	SA Information
822 WALNUT ST, ORLANDO, FL, 32806-1363	\$0.00	\$0.00	Residential Water, Active, 08-21-2013 - \$0.00, 9223625002
822 WALNUT ST, ORLANDO, FL, 32806-1363	\$0.00	\$0.00	Residential Solid Waste, Active, 08-21-2013 - \$0.00, 9223625030
822 WALNUT ST, ORLANDO, FL, 32806-1363	\$0.00	\$0.00	Residential Water-Irrigation, Active, 01-09-2014 - \$0.00, 9223625227

The following instruction will illustrate several methods of navigating from Control Central to the Premise object.

The Current Context Method

1. Search for and select the Premise at Control Central. Once the Premise is in context at Control Central Account Information portal, click the **Premise context menu** in the Current Context zone and select **Go To Premise**.

The screenshot shows the Control Central interface with the 'Premise Tree' tab selected. The 'Current Context' section shows the account information for Mears, James L. The 'Premise' field is highlighted with a red box, showing the address: 822 WALNUT ST, ORLANDO, FL, 32806-1363. A dropdown menu is open below the 'Premise' field, with 'Go To Premise' selected and highlighted with a red box. The 'Bill Graph' and 'SA Premise List' table are also visible.

2. The Premise Main page will display.

Premise

Bookmark Delete Clear Save Refresh

Main | Characteristics | Misc | Geographic Data | Alternate Address | Premise Portal

Premise 822 WALNUT ST, ORLANDO, FL, 32806-1363 Premise ID 4029610001

Premise Type Single Family Home

Premise Address

Country United States of America

Postal 32806-1363 CIS Division OUC Add/Update Premise

Address 1 822 WALNUT ST

Address 2

Address 3

City ORLANDO

County

State FL Florida 32806-1363

Mailing Address

Landlord Agreement

Parent Premise ID

- Premise - 822 WALNUT ST, ORLANDO, FL, 32806-1363
 - SP - Electric - Residential/822 WALNUT ST, ORLANDO, FL, 32806-1363
 - SP - Electric - Residential/Service Cycle 3/MicroNetwork for Cycle 0003/822 WALNUT ST, ORLANDO, FL, 32806-1363
 - SP - Electric Meter - Temporary/822 WALNUT ST, ORLANDO, FL, 32806-1363
 - SP - Solid Waste Residential/822 WALNUT ST, ORLANDO, FL, 32806-1363
 - SP - Water - Irrigation Mtr - Res/Service Cycle 17/MICRONET Cycle 17 W/822 WALNUT ST, ORLANDO, FL, 32806-1363
 - SP - Water - Residential - City Swr/Service Cycle 17/MICRONET Cycle 17 W/822 WALNUT ST, ORLANDO, FL, 32806-1363
 - SP - Water - Special Irrig - Res/822 WALNUT ST, ORLANDO, FL, 32806-1363
 - Account - 9223625784 Mears,James L, Residential, \$307.75, 9223625784
 - Historical service agreement(s) exist.

The Premise Hyperlink Method

At the Account Information portal, click the Dashboard **Premise hyperlink**. The Premise Main page will display.

Control Central

Bookmark Clear Save Refresh

Main | Account Information | Customer Information | Account Tree | Premise Tree | Bill/Payment Tree | Pay Plan Tree

Current Context

Person Mears,James L

Account ID 9223625784 3 Mears,James L, Residential, \$0.00, 9223625784

Current Balance \$0.00

Premise 822 WALNUT ST, ORLANDO, FL, 32806-1363

Customer Information (Map Zone) Bill Graph

Current Context

- Mears,James L
- 9223625784 3
- Mears,James L, Residential, \$0.00, 9223625784
- 822 WALNUT ST, ORLANDO, FL, 32806-1363

The Premise Tree Method

This path provides the added benefit of viewing the Service Points and other Premise related information before actually navigating to the Premise object.

At the Account Information page, click the Premise Tree tab. The Premise Tree will display.

Control Central

Bookmark Clear Save Refresh

Main | Account Information | Customer Information | Account Tree | Premise Tree | Bill/Payment Tree | Pay Plan Tree

Premise Tree

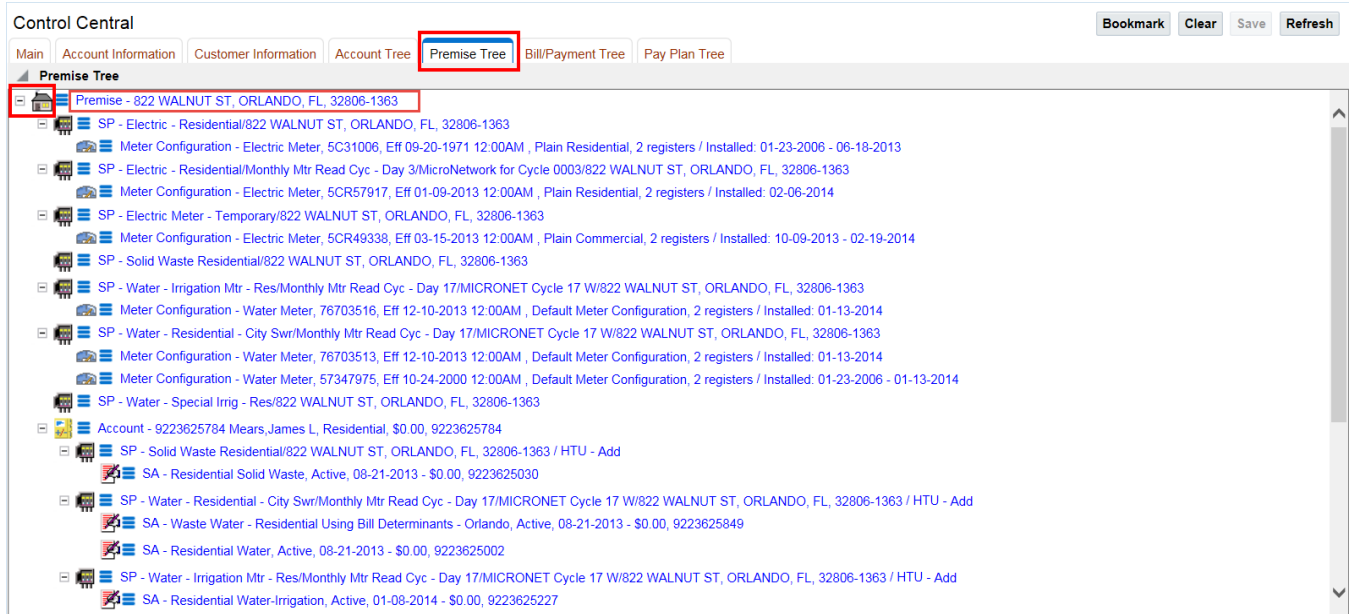
Premise - 822 WALNUT ST, ORLANDO, FL, 32806-1363

Note: Click the Expand Branch icon  of the Premise Tree to view additional Premise Information.

You may also expand all nodes of the Tree at once by pressing the Ctrl key and left clicking your mouse on the Premise icon as shown below.

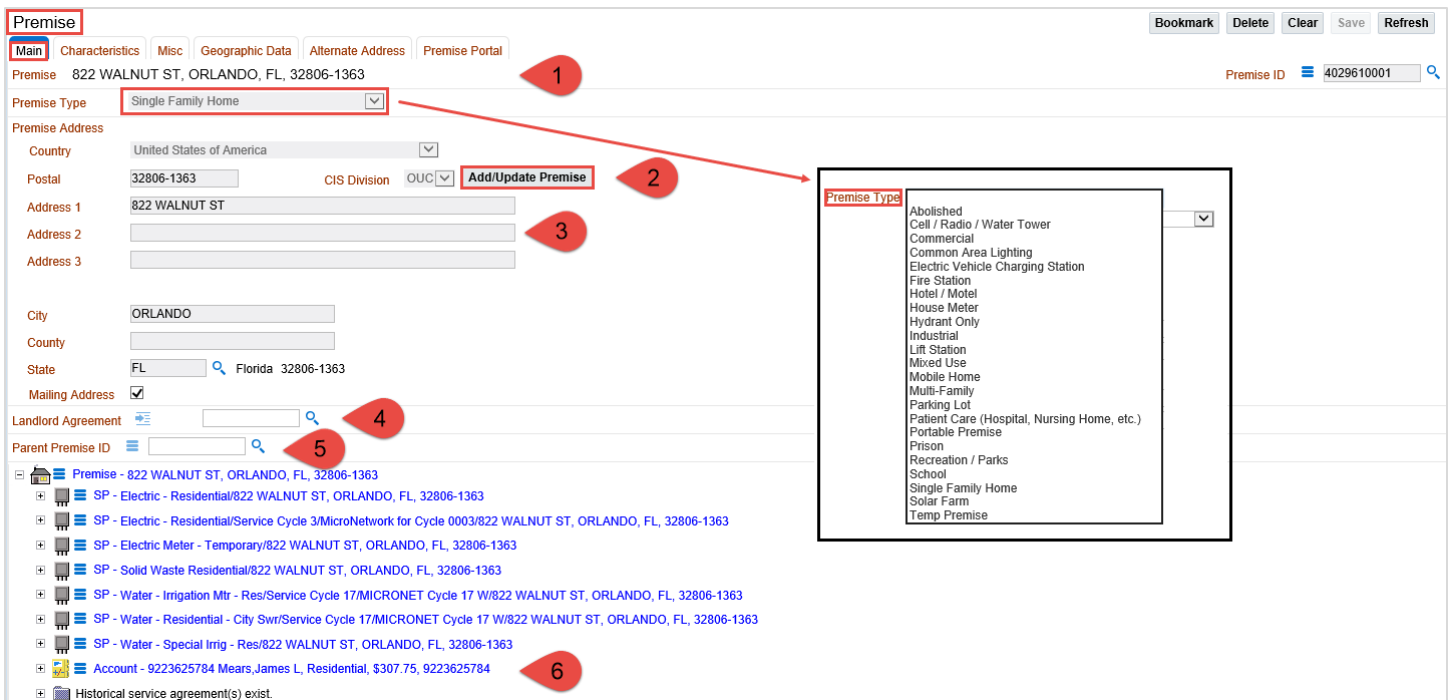
At the Premise Tree:

- View the branches of the Premise Tree.
- Click the Premise hyperlink to go to the Premise Main page.
- Review the Premise pages below.



1.1.1.2 The Premise Main Page

The Premise Main page defines the Premise Type, contains Primary Address details and an Add/Update Premise button.



Number	Description
1	Premise Info Section – Defines the Premise Address and system assigned ID number in context.
2	Premise Type – Identifies the type of Premise (Note the Premise Type valid Values list)
3	Premise Address – Defines the physical address of the Premise including County, Postal Code, CIS Division, Update Premise button, Street Number and Name, City, State, Mailing Address checkbox.
4	Landlord Agreement – Identifies the related Land Lord Agreement if applicable.
5	Parent Premise – Identifies the Parent Premise to the Premise in context – used in conjunction with CC&B's Premise Management Functionality. Please note that the Parent Premise functionality will not be used at "YOUR UTILITY" – only the Landlord search function of Premise Management have been authorized at this time.
6	Premise Tree – Provides a hierarchical view and hyperlinks to other Premise related information.

1.1.1.3 The Premise Characteristic Page

Click the Characteristic tab to view "YOUR UTILITY" defined attributes for the Premise object.

Premise 822 WALNUT ST, ORLANDO, FL, 32806-1363 Premise ID 4029610001

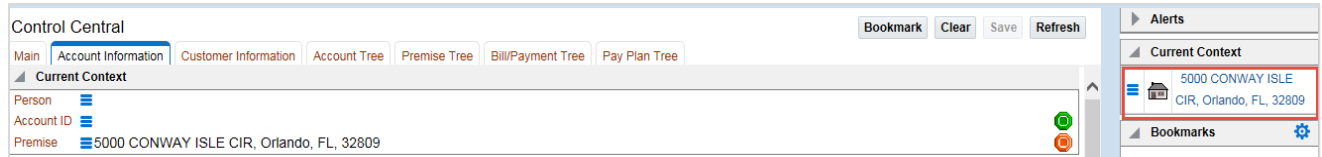
	Effective Date	Characteristic Type	Characteristic Value
+ [trash]	01-01-2002	Taxing City	ORLANDO City of Orlando
+ [trash]	01-01-2002	Taxing County	ORANGE Orange County
+ [trash]	01-01-2002	Taxing State	FLORIDA Florida

Number	Description
1	Premise Info Section - defines the Premise Address and system assigned ID number in context.
2	Premise Characteristics Type – one row for each date effective Characteristic and Value.

1.1.1.3.1 Viewing a Premise Characteristic with an Attachment

"YOUR UTILITY" uses this functionality to store documents for audit reports upon completion of an energy audit. After uploading the attachment to a shared drive, the user copies the link of the file location and adds this file location as a new characteristic. The document can be accessed through the dashboard Premise hyperlink, Premise context menu, and Premise Information zone.

- With the Premise in context at Control Central, click the Dashboard **Premise hyperlink**. The Premise Main page will display.



Note: May also be accessed via the Premise context menu.

- Click **Premise Characteristics tab**. At the Premise Characteristic page, click the **Launch File icon** to view the attachment.

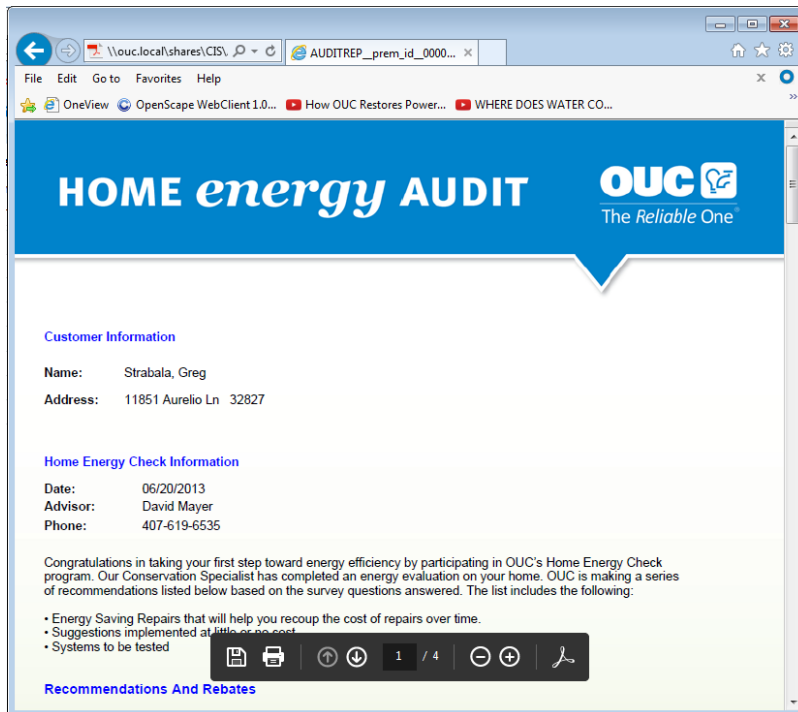
Premise

Main Characteristics Misc Geographic Data Alternate Address Premise Portal

Premise 11851 AURELIO LN, ORLANDO, FL, 32827

		Effective Date		Characteristic Type	Characteristic Value
+	🗑️	06-20-2013	📄	Audit Report	\\ouc.local\shares\CIS\Attachments\AUDITREP__prem_🔗📄
+	🗑️	12-06-2012	📄	ES Clothes Washer	ENGSCWSH 🔍 ES Clothes Washer
+	🗑️	08-24-2013	📄	ENG STAR Wtr Htr	ENGSWTRH 🔍 ENG STAR Wtr Htr
+	🗑️	01-01-2002	📄	Subdivision	VAL2 🔍 Village Walk at Lake Nona 2A&B
+	🗑️	01-01-2002	📄	Taxing City	ORLANDO 🔍 City of Orlando
+	🗑️	01-01-2002	📄	Taxing County	ORANGE 🔍 Orange County
+	🗑️	01-01-2002	📄	Taxing State	FLORIDA 🔍 Florida

- The Audit Report attachment will open in a new window.



- Return to Control Central Account Information page.



- From the Control Central Account Information page scroll down to the Premise Information zone. Click on the **Go** button next to Audit Report.

Control Central [Bookmark] [Previous Item] [Next Item] [Clear] [Save] [Refresh]

Main **Account Information** Customer Information Account Tree Premise Tree Bill/Payment Tree Pay Plan Tree

Current Context

Person: Strabala, Greg
 Account ID: 6712177353 4 Strabala, Greg, Residential, \$0.00, 6712177353
 Current Balance: \$0.00
 Premise: 11851 AURELIO LN, ORLANDO, FL, 32827

Customer Information (Map Zone) [Settings] **Bill Graph** [Settings]

Main [Info]

Account ID: 6712177353
 Main Customer: Strabala, Greg
 Set Up Date: 09-27-2012
 CIS Division: OUC
 Customer Class: Residential
 Bill Route Type: Route via email
 Bill Cycle: Bill Cycle 1
 Current Credit Rating: 100
 Next Credit Review Date: 11-05-2019
 Spouse: Budhar, Ambica
 Birthdate: 11-07-1966
 Primary Phone: (407) 555-5555
 Home Phone: (407) 555-5555
 Social Security: ***-**-9449
 Email Address: gstrabala@gmail.com

SA Premise List

Premise	Current Balance	Payoff Balance	SA Information
11851 AURELIO LN, ORLANDO, FL, 32827	\$0.00	\$0.00	Waste Water - Residential - City of Orlando, Active, 10-01-2012 - \$0.00, 6712151937
11851 AURELIO LN, ORLANDO, FL, 32827	\$0.00	\$0.00	Residential Solid Waste, Active, 10-01-2012 - \$0.00, 6712177057
11851 AURELIO LN, ORLANDO, FL, 32827	\$0.00	\$0.00	Residential Water, Active, 10-01-2012 - \$0.00, 6712177210
11851 AURELIO LN, ORLANDO, FL, 32827	\$0.00	\$0.00	Residential Electric, Active, 10-01-2012 - \$0.00, 6712177402

Account Financial History

Billed Consumption [Settings]

Premise Information

Premise Information: 11851 AURELIO LN, ORLANDO, FL, 32827
 CIS Division: OUC
 Audit Report: \\ouc.local\shares\CIS\Attachments\AUDITREP__prem_id__0000790653__MAYED1772013-06-20-11.07.39.000000\Strabala, Greg.pdf
 ES Clothes Washer: ES Clothes Washer
 ENG STAR Wtr Htr: ENG STAR Wtr Htr
 Subdivision: Village Walk at Lake Nona 2A&B
 Taxing City: City of Orlando
 Taxing County: Orange County
 Taxing State: Florida
 Service Point Information: Water - Residential - City Swr/Service Cycle 1/00000041/11851 AURELIO LN, ORLANDO, FL, 32827
 Meter Configuration: Water Meter, 74809334, Eff 08-20-2012 12:00AM, Water Default Meter, 2 registers
 Last Meter Read: 10-01-2012 10:00AM
 Next Meter Read: 12-02-2019 (Service Cycle 1)
 Service Point Information: Solid Waste Residential Badged/11851 AURELIO LN, ORLANDO, FL, 32827
 Item Information: 95 Gallon Cart Residential Use / 009112631 / 12 112631 - Active - Installed
 Service Point Information: Electric - Residential/Service Cycle 1/00000021/11851 AURELIO LN, ORLANDO, FL, 32827
 Meter Configuration: Electric Meter, 5CR46496, Eff 04-05-2012 12:00AM, KWH, 2 registers
 Last Meter Read: 06-03-2013 01:19AM
 Next Meter Read: 12-02-2019 (Service Cycle 1)

Field Activity Information

Account Activity History

Timeline zone for the call center

- The Premise Characteristics page displays. Click the Launch File icon to view the attachment.

Premise [Main] **Characteristics** [Misc] [Geographic Data] [Alternate Address] [Premise Portal]

Premise: 11851 AURELIO LN, ORLANDO, FL, 32827

	Effective Date	Characteristic Type	Characteristic Value
[+]	06-20-2013	Audit Report	\\ouc.local\shares\CIS\Attachments\AUDITREP__prem_id__0000790653__MAYED1772013-06-20-11.07.39.000000\Strabala, Greg.pdf
[+]	12-06-2012	ES Clothes Washer	ENGSCWSH [Go] ES Clothes Washer
[+]	08-24-2013	ENG STAR Wtr Htr	ENGSWTRH [Go] ENG STAR Wtr Htr
[+]	01-01-2002	Subdivision	VAL2 [Go] Village Walk at Lake Nona 2A&B
[+]	01-01-2002	Taxing City	ORLANDO [Go] City of Orlando
[+]	01-01-2002	Taxing County	ORANGE [Go] Orange County
[+]	01-01-2002	Taxing State	FLORIDA [Go] Florida

The Audit Report attachment will open in a new window.

1.1.2 Viewing Premise Types

Every Premise references a Premise Type. This configuration is used to categorize or describe the type of Premise. The following is an example listing of Premise Types and Premise Sub Types for "YOUR UTILITY".

Here is a list of all the different types that "YOUR UTILITY" services.

Abolished
Cell / Radio / Water Tower
Commercial
Common Area Lighting
Electric Vehicle Charging Station
Fire Station
Hotel / Motel
House Meter
Hydrant Only
Industrial
Lift Station
Mixed Use
Mobile Home
Multi-Family
Parking Lot
Patient Care (Hospital, Nursing Home, etc.)
Portable Premise
Prison
Recreation / Parks
School
Single Family Home
Solar Farm
Temp Premise

1.1.3 Premise Notes

Premise Notes in CC&B make use of a separate page. With the given Premise in context, the user will access a Premise Note to add or update. Note and Note Subtype selections are available along with applicable comments. Premise Notes are used for deposit quotes, tampering, inspections, Service Point Route/Sequence changes, and red flag alerts as examples. When the user creates the Premise Note a Case is automatically created in CC&B.

Cases are inquiries, problems, or issues that typically require follow-up to resolve and/or complete. Case Management allows you to perform one or more tasks related to the case while capturing relevant information. Information can be stored in documents and records that are linked to the case. Cases can go through stages or a lifecycle of events. When a Case is active and open, a dashboard alert displays. For "YOUR UTILITY" the Premise Note has one status, Open and considered Active.

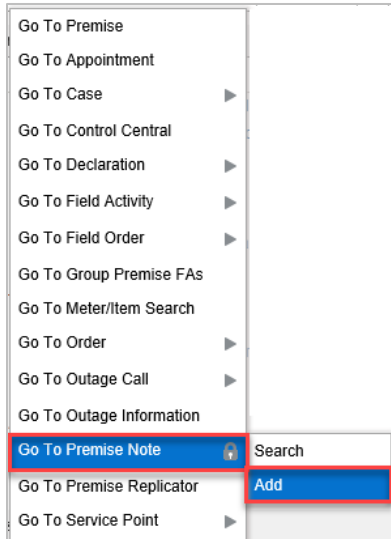
If the user clicks on the Premise Note alert in the Dashboard the Case workbook displays. Navigating from the Premise Context menu, Premise Note Search or Add directs the user to the Premise Note portal. The preferred method of navigation for the user is from the Premise context menu. This method transfers the user to the Premise Note workbook to add or update a Premise Note.

It is very important to understand the difference between the Case workbook and the Premise Note portal, or you will find yourself on an unexpected page. The Premise Context menu is available for navigation to Premise Note portal from the Case workbook.

1.1.3.1 Creating a Premise Note

There are many reasons Premise Notes are created. For example: deposit quotes, tampering, inspections, Service Point Route/Sequence changes, and red flag alerts. The steps outlined below are the same regardless the reason for the note being created. However, the selection of the Note Type and Note Subtype needs to be specific to the type of Premise Note you are creating.

1. With the Premise in context at Control Central, click the **Premise context menu** and select **Go To Premise Note** in the **Add** mode.



2. The Premise Note Add page displays.

A screenshot of a web form titled 'Premise Note'. The form is for a premise located at '536 S CONWAY RD APT B, ORLANDO, FL, 32807-1109'. The form fields are: Service Point (empty), Note Type (dropdown), Note Subtype (dropdown), Note Date/Time (11-18-2019, 11:37AM), and Long Comments (text area). There are 'Save' and 'Cancel' buttons at the bottom left.

3. From the Service Point dropdown, select the applicable Service Point. It is not mandatory to provide a Service Point.

A screenshot of the same web form as above, but with the 'Service Point' dropdown menu open. The dropdown list contains two options: 'Electric - Residential/Service Cycle 19/Cycle 0019 MicroNetwork Route/536 S CONWAY RD APT B, ORLANDO, FL, 32807-1109' and 'Solid Waste Paid by Others or No Bill/536 S CONWAY RD APT B, ORLANDO, FL, 32807-1109'. The first option is selected and highlighted in blue. The other fields and buttons remain the same.

4. From the Note Type dropdown, select the applicable Note Type.

Premise 536 S CONWAY RD APT B, ORLANDO, FL, 32807-1109

Service Point Electric - Residential/Service Cycle 19/Cycle 0019 MicroNetwork Route/536 S CONWAY RD APT B, ORLANDO, FL, 32807-1109

Note Type * **Customer Pending**

Note Subtype * **Deposit Quote**

Note Date/Time * 11-18-2019 11:37AM

Long Comments

- Black Seal
- City SW Miscellaneous Notes
- City WW - Misc Note
- Conservation Rebate
- Conservation Rebate/Loans
- Customer Pending
- Efficiency Delivered
- Energy Survey
- In Home Display
- Inspection Clearance
- Investigation - RPS
- Investigation - Rev Assurance
- Mandatory Power Pass Premise
- Meters Electric/Water
- No Bill Services
- Premise Note
- Premise Related
- Recommended Deposit Note Type
- Red Flag Alert
- Service Point
- Service Point - Electric
- Service Point - Water
- Streetlight

5. From the Sub Note Type dropdown, select the applicable Note Subtype. Use the scroll bar on the right to view the rest of the list. The options listed in the dropdown are specific to the Note Type selected above.

Premise 536 S CONWAY RD APT B, ORLANDO, FL, 32807-1109

Service Point Electric - Residential/Service Cycle 19/Cycle 0019 MicroNetwork Route/536 S CONWAY RD APT B, ORLANDO, FL, 32807-1109

Note Type * Customer Pending

Note Subtype * **AC Pipe Insulation**

Note Date/Time * 11-18-2019 11:37AM

Long Comments

- AC Pipe Insulation
- AC Proper Sizing
- AMI Opt Out
- ARS Completed
- ARS Researching
- Acreage for Water Consv Rate
- Active Investigation (ACTI)
- Active Investigation (ACTINV)
- Additional Info Needed
- Air Filters Installed
- Apt Financed Fix-Up Loan-15%
- Apt Fix-Up Loan-85%
- Backflow, Test, Comp, Req
- Bad Debt Owed
- Blower Door Test
- Broken Irrigation Lines
- Business Gate Locked
- ByPass Engaged
- CES-COMM Energy Survey
- CRES-DVD RESI English
- CRES-DVD RESI Spanish
- CT/Wire Tampering
- Caulking Tubes Used
- Ceiling Insulation Sq. Ft.
- Change of Service
- City Wastewater-New Service
- Commercial
- Converted CC-no Cust Code
- Converted Permit Info

6. The date defaults to current date and time. Date and time can be changed if required.

Premise 536 S CONWAY RD APT B, ORLANDO, FL, 32807-1109

Service Point Electric - Residential/Service Cycle 19/Cycle 0019 MicroNetwork Route/536 S CONWAY RD APT B, ORLANDO, FL, 32807-1109

Note Type * Customer Pending

Note Subtype * Deposit Quote

Note Date/Time * 11-18-2019 11:37AM

Long Comments

- Add comments to detail the reason for the Premise Note, such as inspection issues, tampering, deposit required, multiple customers attempting to start service, or red flag activities.

Premise Note

Premise 536 S CONWAY RD APT B, ORLANDO, FL, 32807-1109

Service Point Electric - Residential/Service Cycle 19/Cycle 0019 MicroNetwork Route/536 S CONWAY RD APT B, ORLANDO, FL, 32807-1109

Note Type * Customer Pending

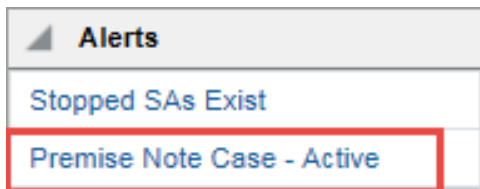
Note Subtype * Deposit Quote

Note Date/Time * 11-18-2019 11:37AM

Long Comments
Smith, John W called reg dep for this Premise. \$325 quoted 11/18/19 KRT x42867

Save Cancel

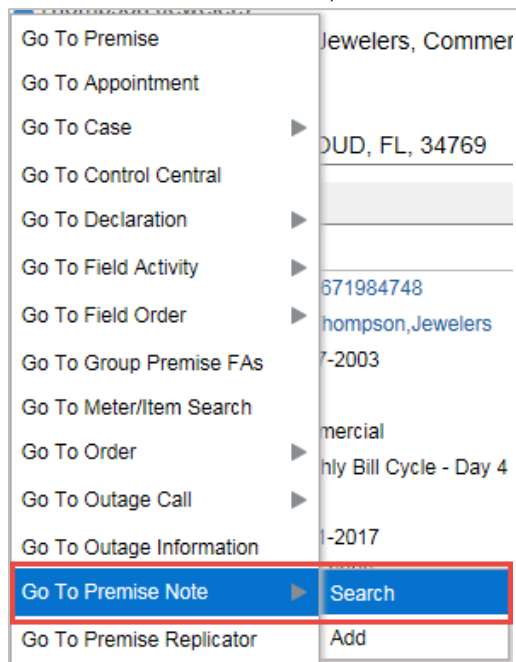
- Click **Save**.
- A Dashboard Alert for Premise Note displays. As mentioned at the beginning of this walk through, a Premise Note in CC&B is using Case functionality. When the user clicks on the Dashboard alert they are directed to the Case workbook.



1.1.3.2 Viewing Existing Premise Notes

The method described below is the preferred method for viewing premise notes. The Dashboard alert will direct you to the Case workbook and not the Premise Note portal. Information on finding the note from the case is described in a subsequent exercise.

- With the Premise in context, click **Premise context menu**, then select **Premise Note > Search**.



2. The Premise Note portal displays. Click the **Broadcast** button to display the existing Premise Note.

Premise	Note Date/Time	Note Type	Note Subtype	Service Point ID	SP Type
1 536 S CONWAY RD APT B, ORLANDO, FL, 32807-1109	07-07-2018 11:16AM	Customer Pending	Deposit Quote		
2 536 S CONWAY RD APT B, ORLANDO, FL, 32807-1109	07-07-2018 11:16AM	Recommended Deposit Note Type	Recommended Deposit Note Subtype		
3 536 S CONWAY RD APT B, ORLANDO, FL, 32807-1109	03-07-2012 12:00AM	Customer Pending	Deposit Quote		
4 536 S CONWAY RD APT B, ORLANDO, FL, 32807-1109	11-03-2010 12:00AM	Customer Pending	Deposit Quote		

3. Clicking Broadcast button displays the existing Premise Note with options to **Edit** or **Delete**.

Premise Note Details

Premise 536 S CONWAY RD APT B, ORLANDO, FL, 32807-1109

Note Type Customer Pending

Note Subtype Deposit Quote

Note Date/Time 07-07-2018 11:16AM

User PRODUCTION, CCB-ESB

Long Comments WEB Calculated Deposit Quote of \$120 On 07-07-2018 By Martinez,Michelle AND 3338

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1.1.3.2.1 Premise Note Case Dashboard Alert

When a new Premise Note is created a Dashboard alert is automatically added by the system.

Single Premise Note:

Alerts
Last Contact: 274 days ago - Do Not Use, Conversion Only
Charity
Account Has Multiple Premises
2 Persons On Account
Landlord Exists
Pending Order Exists
Quotable Proposal SA Exists
Pending Start
Premise Note Case - Active

Multiple Premise Notes:

Alerts
Last Contact: 479 days ago - Do Not Use, Conversion Only
Active Write Off Process
Premise Has Multiple Accounts
2 Persons On Account
Landlord Exists
Collection Referral Active
Stopped SAs Exist
4 Premise Note Cases