

Docket No: A.13-12-012 / I.14-06-016

Exhibit: _____

Date: August 11, 2014

Witness: Anthony Cusati, III

**TESTIMONY OF ANTHONY CUSATI, III ON BEHALF OF THE CORE TRANSPORT
AGENT CONSORTIUM IN PACIFIC GAS & ELECTRIC'S GAS TRANSMISSION
AND STORAGE RATE CASE AND CONSOLIDATED ORDER INSTITUTING
INVESTIGATION**

Testimony of Anthony Cusati, III

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Q: Please state your name, title and business address.

A: My name is Anthony Cusati, III. I am the Director of Regulatory Affairs for Interstate Gas Supply, Inc. dba IGS Energy (“IGS”). My business address is 1379 Butter Churn Drive, Herndon, Virginia 20170. My professional and educational qualifications are provided in Attachment 1.

Q: Please describe IGS

A: IGS serves over 1 million customers nationwide and sells natural gas and electricity to customers in 11 states and in over 40 utility service territories. The IGS family of companies (which include IGS Generation, IGS Home Services and IGS CNG Services) also provides customers focused energy solutions that complement IGS Energy’s core commodity business including distributed generation, CNG refueling, and utility line protection. .Currently our operations in California are focused on supplying natural gas to the residential consumer.

Q: Have you previously testified before the California Public Utilities Commission?

A: No I have not previously testified before the California Public Utilities Commission, however, I have provided testimony in regulatory proceedings in New York, Pennsylvania, Maryland, Texas and Illinois.

Q: On whose behalf are you testifying?

A: I am testifying on behalf of the Core Transport Agent Consortium (“CTAC”). CTAC is an ad-hoc coalition representing a significant portion of core transport agent (“CTA”) service in northern California. IGS is as member of CTAC.

Q: What is the purpose of your testimony?

1 A: This testimony presents information as to issues that IGS currently experiences with
2 PG&E's consolidated billing practices and protocols.

3 **Q: What is consolidated billing?**

4 A: Consolidated Billing is an optional service provided by PG&E whereby a CTA provides
5 PG&E either the amount to charge the CTA customers or a rate on a per therm basis, for
6 natural gas service that PG&E uses to calculate the CTA charges. PG&E then bills the
7 CTA's customer on behalf of the CTA, collects charges for the CTA-provided gas on
8 behalf of the CTA, and electronically transmits that payment to the CTA.

9 **Q: Does IGS utilize PG&E consolidated billing.**

10 A: Yes. IGS utilizes consolidated billing for its residential customers in PG&E's service
11 territory.

12 **Q. Does IGS pay PGE for the utility consolidated billing service?**

13 A. Yes. IGS pays PGE for the utility consolidated billing service of 70 cents per invoice.
14 Further, in order to initiate utility consolidated billing IGS was required to pay PGE
15 substantial set-up fees and we are required to pay on-going maintenance fees. Thus the
16 payments that IGS makes to PGE for the utility consolidated billing service are
17 significant.

18 **Q. Do CTA customers pay for utility billing services?**

19 A. Yes. CTA customers pay distribution rates and the cost of utility billing is recovered
20 through distribution rates. Bundled customers cost of billing for the natural gas
21 commodity are recovered through distribution rates as well so it would be reasonable to
22 expect that CTA customers would get the same level of service for billing that is afforded
23 to bundled customers.

1 **Q. Why is utility consolidated billing important?**

2 A. Utility consolidated billing is important in order for residential customers to have a
3 positive customer experience when receiving natural gas service from a CTA.
4 Residential gas customers generally prefer to receive one bill from the utility for
5 distribution and commodity service. When the customer leaves PGE in order to receive
6 commodity gas service from a CTA the CTA could either bill the customer separately for
7 commodity, but that would mean the customer would receive two bills for their natural
8 gas service. The other option is for the CTA to utilize utility consolidated billing which
9 enables the customer to continue to receive one bill for distribution and commodity
10 service. Currently under the California regulatory structure CTAs do not have the ability
11 to bill for the utility distribution charges, so CTA's cannot maintain that one bill
12 experience for the customer without utilizing utility consolidated billing.

13 **Q: Has IGS experienced any issues with the timely remittance of payments from**
14 **PG&E?**

15 A: Yes. It is has been IGS' experience that PG&E does not consistently release customer
16 payments to IGS in a timely manner.

17 **Q: Do you know of circumstances that might lead PG&E not to make timely payments**
18 **to IGS?**

19 A: Yes. It is my understanding that if there is a credit or refund provided on a customer bill,
20 which has no relationship with the commodity charge of IGS, a portion of such credit is
21 applied to the IGS commodity charge, thus reducing the amount remitted and owed to
22 IGS in this circumstance. Moreover, if an IGS customer is under-billed, PG&E may take
23 funds paid by the customer for IGS' balance and apply such funds to other PG&E

1 charges on the bill such as transmission and distribution charges. Also, if a customer is
2 put on a negotiated payment plan it is my understanding that PG&E will apply all funds
3 paid by the customer on such payment plan to PG&E charges first before remitting any
4 payment to IGS.

5 **Q: Does PG&E inform IGS of the reasons why PG&E has not remitted payments made**
6 **by IGS' customers?**

7 A: No. PG&E does not inform IGS of the fact that it has received payment from an IGS
8 customer but has not remitted such payment to IGS, nor does PG&E provide IGS with
9 any reasons why such payment has not been remitted to IGS. PGE also does not provide
10 any accounting as to how much the customer owes IGS or where IGS' payments stand in
11 line with the other customer payments that are past due.

12 **Q: How does IGS learn of the fact that its customers have paid PG&E for IGS charges**
13 **but PG&E has failed to remit such payment to IGS?**

14 A: Often times, IGS learns of the fact that its customers have already paid an outstanding bill
15 only after it has taken action against the customer based upon non-payment. Where the
16 customer has actually paid PG&E for the IGS portion of the bill, but PG&E has failed to
17 remit such payment, the customer will often contact IGS and inform IGS that the
18 customer has already made the subject payment to PG&E.

19 **Q: What are the consequences of PG&E's practices you have described.**

20 A: PG&E's failure to consistently remit timely customer payments to IGS results in
21 uncertainty as whether there is an error in PG&E's or IGS' billing system, or whether
22 IGS' customer has simply failed to make a payment. If IGS has not been paid, and
23 PG&E will not inform IGS as to the reasons why it has not been paid, IGS is often left

1 with no choice but to inform the customer that no payment has been received, and if such
2 non-payment continues to return the customer to PG&E commodity service and seek to
3 collect the outstanding debt owed to IGS independently of PGE's billing and credit and
4 collection process. In circumstances where the IGS customer has paid, but PG&E has not
5 timely remitted such payment to IGS, or informed IGS as to why it has not remitted such
6 payment, the result is customer frustration. This process makes for an unpleasant
7 customer experience, creates an adversarial relationship with the customer, adds
8 additional resource time which drives up costs, which are passed onto the consumer in
9 the form of higher prices.

10 **Q: Can you provide any examples of some of the circumstances you have described.**

11 A: Yes. Attachments 2 and 3 contain screen shots of customer account information from
12 IGS' accounting and billing system that are representative examples of the problems I
13 have described above regarding PG&E's failure to timely remit payment to IGS. The
14 screen shots in Attachment 2 show examples of accounts for which charges were billed
15 but IGS did not receive timely payment from PG&E. Call notes for these accounts
16 indicate that IGS was provided notice from the customer that payment had been made to
17 PG&E. The screen shots in Attachment 3 show examples of customer accounts for
18 which PG&E and the customer had negotiated a payment plan, but IGS was not informed
19 of such payment plan.

20 **Q. Has IGS attempted to get more information from PGE regarding the customer
21 payment issues?**

22 A. Yes. IGS representatives have had informal conversations with PGE representatives
23 regarding the difficulty we are having from PGE regarding receiving customer payment

1 information. PGE generally cites customer privacy issues regarding why they provide
2 virtually zero information to IGS about the payments made by customers. However, the
3 customer has affirmatively agreed to enroll in commodity service from IGS, and has
4 agreed to terms and conditions of service that authorize IGS to act as their agent and
5 work with PG&E in procuring natural gas supply. Therefore, PGE should provide IGS
6 with the basic customer payment information IGS needs to effectuate the service upon
7 which the customer has enrolled. Generally, this is not controversial. In other
8 jurisdictions with natural gas Choice programs I am unaware of any market where the
9 utility will not provide basic payment information to the Choice supplier such as the
10 amount of money the customer owes to the Choice supplier. IGS participates in dozens
11 of natural gas Choice markets throughout the country.

12 **Q. Do you have any recommendation as to how PGE should correct the problems you**
13 **detail in your testimony?**

14 A. I am in agreement with the recommendations regarding these issues set forth in CTAC
15 Witness Mark Fulmer's prepared testimony in this proceeding.

16 **Q. Will adopting the recommendations listed above significantly improve the**
17 **experience for a customer when the customer is past due on the utility bill?**

18 A. Being past due on a utility bill is likely already a stressful experience for the customer.
19 Thus anything that can be done to ensure that the collections process can go as smoothly
20 and accurately as possible will significantly improve the experience for the customer that
21 is already likely experiencing difficulty. Conversely, when the correct billing data is not
22 provided to CTA, creating uncertainty in the amount that the customer owes, it can
23 significantly exacerbate the customer's difficulties.

1 **Q: Does this conclude your testimony?**

2 A. Yes.

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ATTACHMENT 1

Qualifications of Anthony Cusati, III

I attended Roger Williams College in Bristol, Rhode Island and studied Business Administration with a major in Accounting. I have been employed by Interstate Gas Supply, Inc. since January, 2008 as the Director of Regulatory Affairs, and in that capacity I am responsible for regulatory affairs matters in markets that IGS Energy operates, which includes existing markets as well as new market development. Prior to this, I was employed by two competitive energy supply companies, Commerce Energy, Inc. and ACN Energy, Inc. in similar capacities from 2000 through the end of 2007. Prior to my employment in the competitive energy supply arena, I was employed in the for-profit sector of healthcare, holding various financial management positions ranging from Controller to Chief Financial Officer. In summary, I have considerable experience in many states covering customer CHOICE issues.

Attachment 2

REDACTED

Print AR History

[Close](#)

Account #: [REDACTED]

Date From: **March 31 2013**

Date To: **July 31 2014**

View Results

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AR Summary for: 3/31/2013 - 7/31/2014

Invoice #	Type	Invoice Date	Due Date	Service Period	Prev. Balance	Payments + Adjustments	Invoice Amount	Amount Due
[REDACTED]		3/24/2014	4/23/2014	2/21/2014 - 3/22/2014	\$494.95	\$366.18	\$62.27	\$191.04
	Payment			3/6/2014		\$366.18		\$128.77
		2/21/2014	3/13/2014	1/22/2014 - 2/21/2014	\$366.18	\$0.00	\$128.77	\$494.95
	Late Fee	2/7/2014	1/13/2014	11/20/2013 - 12/20/2013	\$369.79	\$0.00	(\$3.61)	\$366.18
		1/22/2014	2/21/2014	12/20/2013 - 1/22/2014	\$184.11	\$0.00	\$185.68	\$369.79
	Late Fee	1/13/2014	1/13/2014	11/20/2013 - 12/20/2013	\$180.50	\$0.00	\$3.61	\$184.11
		12/20/2013	1/9/2014	11/20/2013 - 12/20/2013	\$0.00	\$0.00	\$180.50	\$180.50

REDACTED

Search: Account No: [Redacted] Customers: [Redacted]

Workspace Administration Menu Activity Report Menu Customer Search

Logout

Residential) Residential)

Gas Service (Inactive)

Account #: [Redacted]

Current Bill Due: 4/23/2014

Current Balance: \$191.04

Common Tasks: New Call Post Payment Special Charge Letters

How do I... ?

Balance	Current	1-30	31-60	61-90	91-120	121+	AR Terms (Days)
\$191.04	\$0.00	\$0.00	\$0.00	\$0.00	\$62.27	\$128.77	30

Customer Info Utility Accounts (ESI / LDC) Communication Log AR / Billing

Additional Info User Prefs

Search Call Notes: [Redacted] Search

ID	Date	Department	Type	Detail	Priority	Status	Opened By	Date Opened	Closed By	Date Closed	Service	Modified By	Note
[Redacted]	2/26/2014 12:14 PM	Havenlink	Inbound Cancel	Pricing	Low	Open	[Redacted]	2/26/2014 12:14 PM			Gas	[Redacted]	OB Call. Spoke to [Redacted]. Informed her that this account has a past due balance of \$180.50, due for disconnect on 02/27/2014. Customer said that she wants the account cancelled. Stated that there has been a drastic increase on their bills since they switched over to [Redacted]. Informed her that I would process her cancellation request and provided her a confirmation number [Redacted]. Advised her that it takes 1-2 billing cycles before PG&E can take over the account, based upon where the meter is at in the read cycle. Informed her of PG&E's 1-year stay policy. Customer OK'd.
<p>Created by: [Redacted] Date Added: 2/26/2014 3:24 PM</p> <p>OB Call. Spoke to [Redacted]. Customer mentioned that they always pay the full balance on their PG&E bill and is not sure if there is a line item for our charges on the invoice. She said that she doesn't have the bill at the time being and would still need to check. She also mentioned that payment has been made during the first week of this month.</p>													
[Redacted]	10/30/2013 1:51 PM	None	Correspondence	Document Added to Account	Low	Closed	System User	10/30/2013 1:51 PM			Gas		Contract Letter mailed on Tuesday, October 29, 2013. View
[Redacted]	10/30/2013 1:51 PM	None	Correspondence	Document Added to Account	Low	Closed	System User	10/30/2013 1:51 PM			Gas		Contract Letter mailed on Tuesday, October 29, 2013. View
[Redacted]	10/28/2013 8:07 PM	Enrollment	Payment	B2B Payment	Low	Closed	System User	10/28/2013 8:07 PM	System User		Gas		Enrollment: TPV # [Redacted]

Expand all Memos.

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REDACTED

Print AR History

Close

Account #: [REDACTED]

Date From: **AUG 31 2013**

Date To: **July 31 2014**

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AR Summary for **7/31/2013 - 7/31/2014**

Invoice #	Type	Invoice Date	Due Date	Service Period	Prev. Balance	Payments + Adjustments	Invoice Amount	Amount Due
[REDACTED]	Payment	6/30/2014	7/30/2014	7/7/2014		\$23.59		\$38.50
[REDACTED]				5/22/2014 - 6/21/2014	\$75.55	\$29.77	\$16.31	\$62.09
[REDACTED]	Payment			6/4/2014		\$29.77		\$45.78
[REDACTED]		5/30/2014	6/29/2014	4/23/2014 - 5/22/2014	\$104.01	\$46.20	\$17.74	\$75.55
[REDACTED]	Payment			5/5/2014		\$46.20		\$57.81
[REDACTED]		4/30/2014	5/30/2014	3/22/2014 - 4/23/2014	\$106.24	\$27.68	\$23.45	\$104.01
[REDACTED]	Payment			4/3/2014		\$27.68		\$80.56
[REDACTED]		3/31/2014	4/30/2014	2/21/2014 - 3/22/2014	\$99.85	\$20.19	\$28.58	\$108.24
[REDACTED]	Payment			3/5/2014		\$20.19		\$79.66
[REDACTED]		2/27/2014	3/19/2014	1/22/2014 - 2/21/2014	\$52.78	\$0.00	\$47.07	\$99.85
[REDACTED]		1/29/2014	2/28/2014	12/20/2013 - 1/22/2014	\$0.00	\$0.00	\$52.78	\$52.78

REDACTED

Search: Account No: [REDACTED] Customers: [REDACTED] ED Logout

Workspace Administration Menu Activity Report Menu Customer Search

[REDACTED] (Residential) [REDACTED] (Residential) >>

[REDACTED] ED
 Account #: [REDACTED]
ACT
 Gas Service (Inactive)
 Current Bill Due: 7/30/2014
 Current Balance: \$38.50

Common Tasks: [REDACTED] New Call [REDACTED] Post Payment [REDACTED] Special Charge [REDACTED] Letters How do I... ?

Balance Current	1-30	31-60	61-90	91-120	121+	AR Terms (Days)
\$38.50	\$0.00	\$16.31	\$17.74	\$4.45	\$0.00	30

[Customer Info] [Utility Accounts (ESI / LDC)] [Communication Log] [AR / Billing] [Additional Info] [User Prefs]

Search Call Notes: [REDACTED] Search ?

ID	Date	Department	Type	Detail	Priority	Status	Opened By	Date Opened	Closed By	Date Closed	Service	Modified By	Note
[REDACTED]	4/15/2014 12:57 PM	ista	ista Operations	Acct Maint	Low	Closed		4/15/2014 12:57 PM			Gas		Bulk Note 04/15/2014 - Customer is part of System Duns Split Deployment. Old Duns: [REDACTED]
[REDACTED]	5/20/2014 10:26 AM	Havenlink	Bill Inquiries	Balance Due	Low	Open	[REDACTED]	5/20/2014 10:26 AM			Gas	[REDACTED]	[REDACTED] called in annoyed in regard to the DNP notice he received. He said that he [REDACTED] payment arrangement with the utility and has paid the full amount on his bill. [REDACTED] he called PG&E and was told that he is current on his account only to [REDACTED] that he owed us money. Customer said that this is making him upset because after he paid his bill, he assumed that everything has already been taken care of. Explained that PG&E has not remitted his full payment yet as we only received \$45.20 last 5/5/2014. Advised him to call PG&E first and verify with them why they have not remitted the full payment yet. Customer OK'd.
[REDACTED]	5/30/2014 5:26 PM	Havenlink	Bill Inquiries	Balance Due	Low	Open	[REDACTED]	5/30/2014 5:26 PM			Gas	[REDACTED]	[REDACTED] called in to know why he received final notice from [REDACTED] I explained to him the reason why he received the notice. Customer said that he already paid PG&E for months in March and April. Customer was very upset for receiving the notice because it will effect his credit. Informed customer that we are not adding late fees on customer's account. Customer still not happy of what happened. I advised him to call PG&E to verify what happened to the payment he sent to PG&E.
[REDACTED]	6/23/2014 6:36 PM	Havenlink	Bill Inquiries	Balance Due	Low	Open	[REDACTED]	6/23/2014 6:36 PM			Gas	[REDACTED]	[REDACTED] called in and just expressed his sentiments regarding the final notices he received from [REDACTED]. He doesn't appreciate something we are sending that he can't have any control of. It is the second time that he received a final notice for late payment and it's irritating because he already paid his bill. According to [REDACTED] the final notice is vague, threatening and demanding. It's just a final notice with no official invoices so it's not fair. It's not a good business practice according to him. He's aware that if PG&E will not remit a payment on the 28th, the service with [REDACTED] will be disconnected and if that happens, he will take legal actions to both companies. He has a terminal case so he can't pay more than what PG&E is asking him to pay.
[REDACTED]	1/2/2014 10:23 AM	None	Correspondence	Document Added to Account	Low	Closed	[REDACTED]	1/2/2014 10:23 AM			Gas	[REDACTED]	Contract Letter mailed on Thursday, January 02, 2014. [View]

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REDACTED

REDACTED

Print AR History

Close

Account #: [REDACTED]

Date From: **March 31 2013**

Date To: **July 31 2014**

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AR Summary for: 3/31/2013 - 7/31/2014

Invoice #	Type	Invoice Date	Due Date	Service Period	Prev. Balance	Payments + Adjustments	Invoice Amount	Amount Due
	Payment			4/30/2014		\$69.95		\$0.00
	Payment			3/27/2014		\$45.30		\$69.95
[REDACTED]		1/27/2014	2/26/2014	12/25/2013 - 1/25/2014	\$60.47	\$0.00	\$54.78	\$115.25
[REDACTED]		12/26/2013	1/15/2014	11/23/2013 - 12/25/2013	\$0.00	\$0.00	\$60.47	\$60.47

REDACTED

Search: Account No: Customers:

Workspace Administration Menu Activity Report Menu Customer Search
Logout

(Residential) (Residential)

Account #: [REDACTED]

Gas Service (Inactive)
 Current Bill Due: 2/26/2014
 Current Balance: \$0.00

Common Tasks:

How do I... ?

Balance	Current	1-30	31-60	61-90	91-120	121+	AR Terms (Days)
\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	30

Customer Info Utility Accounts (ESI / LDC) **Communication Log** AR / Billing
[Additional Info](#) [User Prefs](#)

Search ?

ID	Date	Department	Type	Detail	Priority	Status	Opened By	Date Opened	Closed By	Date Closed	Service	Modified By	Note
	[REDACTED] 3/12/2014 1:47 PM	Havenlink	Receivables Mgmt	3rd Party Collection Info	Low	Open	[REDACTED]	3/12/2014 1:47 PM			Gas	[REDACTED]	<p>called in because his account was referred to a 3rd party collection. Customer got upset since he has been paying his PG&E in full along with [REDACTED]. Advised customer that we haven't received any payments yet, thats the reason why he was referred to the 3rd party collection. I referred customer to [REDACTED] to further discuss his concern but he was asked to contact us Customer asked to speak with a supervisor. Call escalated to a supervisor. -CS.</p>
<p>Created by: [REDACTED] Date Added: 3/12/2014 1:48 PM</p> <p>***Escalated call*** Spoke with [REDACTED] customer is upset that we referred them to collections without even notifying him when he already paid his balance with PG&E in full because it will not be good for his credit. Apologized for the inconvenience, advised customer to contact PG&E to verify if they already remit his payment to us. Also advised the customer that we can request to recall the account from collections if account is already paid in full.</p>													
	[REDACTED] 3/7/2014 10:52 AM	Collections	Receivables Mgmt	3rd Party Collection Info	Low	Open	[REDACTED]	3/7/2014 10:52 AM			Gas	[REDACTED]	<p>This account has been referred to [REDACTED] for collections as of March 7, 2014. Customers with questions should be referred to [REDACTED]</p>
	[REDACTED] 1/2/2014 10:41 AM	Havenlink	Inbound Cancel	Pricing	Low	Open	[REDACTED]	1/2/2014 10:41 AM			Gas	[REDACTED]	<p>called to asks why hes getting 2 bills for his gas service. Explained to him that [REDACTED] is charging him for the gas supply, and PG&E is for the delivery. He said that he wasnt told about getting 2 bills, instead he was told that he will receive only 1 bill. Asks about the name of the rep he have spoken, but he dont have it. Have asks to cancel the account, as he dont want to pay twice for his gas. Advised him that will send the account to be cancelled, and that it will take 30-45 days, as this will depend with the utility. Customer said that he dont want to pay any more from us.</p>
	[REDACTED] 10/14/2013 6:06 AM	None	Correspondence	Document Added to Account	Low	Closed	System User	10/14/2013 6:06 AM			Gas		<p>Contract Letter mailed on Monday, October 14, 2013. View</p>
	[REDACTED] 10/14/2013 6:06 AM	None	Correspondence	Document Added to Account	Low	Closed	System User	10/14/2013 6:06 AM			Gas		<p>Contract Letter mailed on Monday, October 14, 2013. View</p>

REDACTED

Print AR History

Close

Account #: [REDACTED]

Date From: **March 31 2013**



Date To: **July 31 2014**



View Results



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AR Summary for: 3/31/2013 - 7/31/2014

Invoice #	Type	Invoice Date	Due Date	Service Period	Prev. Balance	Payments + Adjustments	Invoice Amount	Amount Due
[REDACTED]		4/18/2014	5/18/2014	3/19/2014 - 4/18/2014	\$513.07	\$0.00	\$71.30	\$584.37
[REDACTED]		3/19/2014	4/18/2014	2/15/2014 - 3/19/2014	\$420.82	\$0.00	\$92.25	\$513.07
[REDACTED]		2/16/2014	3/8/2014	1/16/2014 - 2/15/2014	\$296.92	\$0.00	\$123.90	\$420.82
[REDACTED]	Late Fee	2/7/2014	1/10/2014	11/15/2013 - 12/17/2013	\$299.98	\$0.00	(\$3.06)	\$296.92
[REDACTED]		1/16/2014	2/5/2014	12/17/2013 - 1/16/2014	\$156.07	\$0.00	\$143.91	\$299.98
[REDACTED]	Late Fee	1/10/2014	1/10/2014	11/15/2013 - 12/17/2013	\$153.01	\$0.00	\$3.06	\$156.07
[REDACTED]		12/17/2013	1/6/2014	11/15/2013 - 12/17/2013	\$0.00	\$0.00	\$153.01	\$153.01

REDACTED

Search: Account No: [Redacted] Customers: [Redacted] Logout

Workspace Administration Menu Activity Report Menu Customer Search

[Redacted] (Residential) [Redacted] (Residential)

Gas Service (Inactive)
 Account #: [Redacted]
 Current Bill Due: 5/18/2014
 Current Balance: \$584.37

Common Tasks: [New Call](#) [Post Payment](#) [Special Charge](#) [Letters](#) How do I...?

Balance	Current	1-30	31-60	61-90	91-120	121+	AR Terms (Days)
\$584.37	\$0.00	\$0.00	\$0.00	\$71.30	\$92.25	\$420.82	30

Customer Info Utility Accounts (ESI / LDC) **Communication Log** AR / Billing Additional Info User Pref

Search Call Notes: [Redacted] Search

ID	Date	Department	Type	Detail	Priority	Status	Opened By	Date Opened	Closed By	Date Closed	Service	Modified By	Note
[Redacted]	2/26/2014 12:21 PM	Havenlink	Receivables Mgmt	1st Call Attempt	Low	Open	[Redacted]	2/26/2014 12:21 PM			Gas	[Redacted]	OB Call. Spoke to [Redacted] Informed him that this account has a past due of \$296.92 due for disconnection on 02/27/2014. Customer said that they already paid the PG&E bill.
Created by: [Redacted] Date Added: 2/26/2014 3:31 PM OB Call. Spoke to [Redacted] He said that he has paid the full balance on his PG&E bill and confirmed that the bill shows a line item for our charges. He said that payment has been made 2/9/2014.													
[Redacted]	10/4/2013 9:05 PM	None	Correspondence	Document Added to Account	Low	Closed	System User	10/4/2013 9:05 PM			Gas		Contract Letter mailed on Friday, October 04, 2013. [View]
[Redacted]	10/4/2013 9:05 PM	None	Correspondence	Document Added to Account	Low	Closed	System User	10/4/2013 9:05 PM			Gas		Contract Letter mailed on Friday, October 04, 2013. [View]
[Redacted]	10/3/2013 4:51 PM	Enrollment	Payment	B2B Payment	Low	Closed	System User	10/3/2013 4:51 PM	System User		Gas		Enrollment: TPV # [Redacted]

Expand all Memos.

SB_GT&S_0346134

REDACTED

Print AR History

Close

Account #: [REDACTED]

Date From: **March 31 2013**

Date To: **July 31 2014**

View Results

Download CSV

AR Summary for: 3/31/2013 - 7/31/2014

Invoice #	Type	Invoice Date	Due Date	Service Period	Prev. Balance	Payments + Adjustments	Invoice Amount	Amount Due
[REDACTED]		4/1/2014	5/1/2014	3/1/2014 - 4/1/2014	\$275.57	\$0.00	\$50.58	\$326.15
[REDACTED]		3/2/2014	3/22/2014	1/30/2014 - 3/1/2014	\$216.00	\$0.00	\$59.57	\$275.57
[REDACTED]	Late Fee	2/7/2014	1/22/2014	11/27/2013 - 12/29/2013	\$218.31	\$0.00	(\$2.31)	\$216.00
[REDACTED]		1/30/2014	3/1/2014	12/29/2013 - 1/30/2014	\$118.00	\$0.00	\$100.31	\$218.31
[REDACTED]	Late Fee	1/22/2014	1/22/2014	11/27/2013 - 12/29/2013	\$115.69	\$0.00	\$2.31	\$118.00
[REDACTED]		12/29/2013	1/18/2014	11/27/2013 - 12/29/2013	\$0.00	\$0.00	\$115.69	\$115.69

REDACTED

Workspace Administration Menu Activity Report Menu Customer Search

Search: Account No: [Redacted] Customers: [Redacted] Logout

Account #: [Redacted] Residential) > [Redacted] Residential) >

Gas Service (Inactive)
Current Bill Due: 5/1/2014
Current Balance: \$326.15

Common Tasks: New Call Post Payment Special Charge Letters

Balance Current 1-30 31-60 61-90 91-120 121+ AR Terms (Days)
\$326.15 \$0.00 \$0.00 \$0.00 \$50.58 \$275.57 30

Customer Info Utility Accounts (ESI / LDC) Communication Log AR / Billing

Search Call Notes: [Redacted]

ID	Date	Department	Type	Detail	Priority	Status	Opened By	Date Opened	Closed By	Date Closed	Service Modified	Note
[Redacted]	3/12/2014 10:14 AM	Havenlink	Payment	TX/CA- Missing Payment	Low	Open	[Redacted]	3/12/2014 10:14 AM				[Redacted] called in and said she received a call yesterday regarding the disconnection fee she needs to pay. Customer said she already made the payment with PG&E in full. Verify if she have any proof of payment but she refused. Customer was upset and said we should be the one checking it with PG&E.
Created by: [Redacted] Date Added: 3/13/2014 10:14 AM												OB call. Dialed: [Redacted] No answer. Left a message to inform that they need to send a proof of payment that it was cleared. Informed that PGE has informed us they will not investigate any missing payments unless we have proof they cashed the check. Provided fax number to send it in and advised to call us back for any questions.
Created by: [Redacted] Date Added: 3/12/2014 3:07 PM												OB call. Dialed: [Redacted] No answer. Left a message to inform that they need to send a proof of payment that it was cleared. Informed that PGE has informed us they will not investigate any missing payments unless we have proof they cashed the check. Provided fax number to send it in and advised to call us back for any questions.
Created by: [Redacted] Date Added: 3/12/2014 2:29 PM												please ask the customer to send proof the payment cleared. PGE has informed us they will not investigate any missing payments unless we have proof they cashed the check.
[Redacted]	2/26/2014 1:49 PM	Havenlink	Receivables Mgmt	1st Call Attempt	Low	Open	[Redacted]	2/26/2014 1:49 PM				OB Call. YN. Left a message to inform customer of their past due balance of \$115.69, scheduled for disconnection on 02/27/2014. Advised to settle their DNP balance ASAP to avoid interruption of services.
[Redacted]	2/24/2014 7:21 AM	Havenlink	Inbound Cancel	Pricing	Low	Open	[Redacted]	2/24/2014 7:21 AM				[Redacted] called in wanted to cancel the account as per customer she discover that she is paying more money with us than with PG&E. Informed customer that i will process the cancellation of the Enrollment/account with us. advised once the cancellation request has been sent, it would already depend on PG&E on when they will schedule the effective cancellation date and take over the account. But usually it would take 30-45days for the cancellation to take effect. Customer okayed.
[Redacted]	10/30/2013 1:49 PM	None	Correspondence	Document Added to Account	Low	Closed	System User	10/30/2013 1:49 PM				Contract letter mailed on Saturday, October 26, 2013. [View]





Attachment 3



REDACTED

Print AR History

Close

Account #: [REDACTED]

Date From: **March 31 2013**  Date To: **July 31 2014**   [View Results](#)  [Download CSV](#)

AR Summary for: 3/31/2013 - 7/31/2014  

Invoice #	Type	Invoice Date	Due Date	Service Period	Prev. Balance	Payments + Adjustments	Invoice Amount	Amount Due
[REDACTED]		7/28/2014	8/27/2014	6/26/2014 - 7/26/2014	\$117.52	\$0.00	\$24.32	\$141.84
[REDACTED]		6/26/2014	7/26/2014	5/28/2014 - 6/26/2014	\$77.26	\$0.00	\$40.26	\$117.52
[REDACTED]		5/28/2014	6/27/2014	4/26/2014 - 5/28/2014	\$39.90	\$0.00	\$37.36	\$77.26
[REDACTED]		4/27/2014	5/27/2014	3/27/2014 - 4/26/2014	\$0.00	\$0.00	\$39.90	\$39.90

REDACTED

Search: Account No: [Redacted] Customers: [Redacted] Logout

Workspace Administration Menu Activity Report Menu Customer Search

[Redacted] (Residential) [Redacted] (Residential)

Gas Service (Inactive)
 Account #: [Redacted]
 Current Bill Due: 8/27/2014
 Current Balance: \$141.84

Account Alerts X Close
 The following alert(s) exist for the current account:
 Disconnect Amount: \$39.90
 Letter Date: 06/11/2014
 Disconnect Date: 06/21/2014

Common Tasks: [New Call](#) [Post Payment](#) [Special Charge](#) [Letters](#) How do I... ?

Balance	Current	1-30	31-60	61-90	91-120	121+	AR Terms (Days)
\$141.84	\$24.32	\$40.26	\$37.36	\$39.90	\$0.00	\$0.00	30

Customer Info | Utility Accounts (ESI / LDC) | **Communication Log** | AR / Billing | Additional Info | User Pref

Search Call Notes: [Redacted]

ID	Date	Department	Type	Detail	Priority	Status	Opened By	Date Opened	Closed By	Date Closed	Service	Modified By	Note
[Redacted]	6/16/2014 4:01 PM	Havenlink	Customer Inquiry	Pricing/Product Inquiry/Switch	Low	Open	[Redacted]	6/16/2014 4:01 PM			Gas	[Redacted]	[Redacted] called in regarding the final notice for late payment. Informed customer that it is a system generated letter that we are sending customers if we haven't received a payment yet from them for the supply charges through PG&E. Customer insisted that it is not just a reminder because her service is in danger of disconnection. She doesn't want to lose gas supply. [Redacted] stated that she has a payment arrangement already with PG&E and we should be communicating with them if they're not remitting our portion on the bill. Explained to [Redacted] that we are coordinating with PG&E to update their standard in remitting the payment to us. Customer asked to speak with a Sup to have an assurance that her gas supply will not be interrupted. [Redacted]

Created by: [Redacted] Date Added: 6/17/2014 6:08 PM
 OS call to inform [Redacted] that the best option we have for her is to contact PG&E and ask them how much she should settle with them to remit the payment to [Redacted]. No answer/left a message. [Redacted]

Created by: [Redacted] Date Added: 6/16/2014 6:57 PM
 OS call to inform [Redacted] that we are still waiting for Corp's reply until now but will get back to her again tomorrow. Customer okay'd. [Redacted]

Created by: [Redacted] Date Added: 6/16/2014 4:22 PM
 Escalated Call: Customer was a little frustrated because of the disconnection notice she received. She explained that she's happy and satisfied with the rate plan that she signed up with [Redacted]. She mentioned that she applied for a payment arrangement with PG&E which will end in a few months. Informed her that the disconnect amount may have been part of the [Redacted]

SB_GT&S_0346139

REDACTED

Print AR History

Close

Account #: [REDACTED]

Date From: **March 31 2013**

Date To: **July 31 2014**



AR Summary for: 3/31/2013 - 7/31/2014

Invoice #	Type	Invoice Date	Due Date	Service Period	Prev. Balance	Payments + Adjustments	Invoice Amount	Amount Due
	Payment			6/12/2014		\$24.51		\$302.13
		3/6/2014	4/5/2014	2/4/2014 - 3/6/2014	\$265.56	\$0.00	\$61.08	\$326.64
		4/4/2014	5/4/2014	3/6/2014 - 4/4/2014	\$223.66	\$0.00	\$41.90	\$265.56
	Late Fee	2/7/2014	1/27/2014	12/4/2013 - 1/3/2014	\$226.23	\$0.00	(\$2.57)	\$223.66
		2/4/2014	3/6/2014	1/3/2014 - 2/4/2014	\$131.17	\$0.00	\$95.06	\$226.23
	Late Fee	1/27/2014	1/27/2014	12/4/2013 - 1/3/2014	\$128.60	\$0.00	\$2.57	\$131.17
		1/3/2014	1/23/2014	12/4/2013 - 1/3/2014	\$0.00	\$0.00	\$128.60	\$128.60

REDACTED

Search: Account No: [Redacted] Customers: [Redacted] Logout

Workspace Administration Menu Activity Report Menu Customer Search

[Redacted] (Residential) [Redacted] (Residential)

Gas Service (Inactive)
 Current Bill Due: 4/5/2014
 Current Balance: \$302.13

Account #: [Redacted]

Common Tasks: [New Call](#) [Post Payment](#) [Special Charge](#) [Letters](#) How do I... ?

Balance	Current	1-30	31-60	61-90	91-120	121+	AR Terms (Days)
\$302.13	\$0.00	\$0.00	\$0.00	\$41.90	\$61.08	\$199.15	30

Customer Info Utility Accounts (ESI / LDC) **Communication Log** AR / Billing Additional Info User Prefs

Search Call Notes: [Redacted] Search

ID	Date	Department	Type	Detail	Priority	Status	Opened By	Date Opened	Closed By	Date Closed	Service	Modified By	Note
[Redacted]	2/26/2014 12:46 PM	Havenlink	Receivables Mgmt	1st Call Attempt	Low	Open	[Redacted]	2/26/2014 12:46 PM			Gas	[Redacted]	OB Call. Spoke to [Redacted] Informed her that they have a past due of \$128.60, due for disconnection on 02/27/2014. Customer asked to be transferred to a [Redacted] agent. Forwarded to [Redacted]
Created by: [Redacted] Spoke with [Redacted] informed her of the past due balance of \$128.60. Customer stated that she already spoke with PG&E and already set up a payment arrangement. Date Added: 2/26/2014 12:49 PM													
[Redacted]	11/2/2013 7:03 AM	None	Correspondence	Document Added to Account	Low	Closed	System User	11/2/2013 7:03 AM			Gas		Contract Letter mailed on Saturday, November 02, 2013. [View]
[Redacted]	11/2/2013 7:03 AM	None	Correspondence	Document Added to Account	Low	Closed	System User	11/2/2013 7:03 AM			Gas		Contract Letter mailed on Saturday, November 02, 2013. [View]
[Redacted]	11/1/2013 9:19 PM	Enrollment	Payment	B2B Payment	Low	Closed	System User	11/1/2013 9:19 PM	System User		Gas		Enrollment: TPV # [Redacted]

Expand all Memos.

SB_GT&S_0346141

REDACTED

Print AR History

Close

Account #:

Date From: **March 31 2013**

Date To: **July 31 2014**

View Results

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AR Summary for: 3/31/2013 - 7/31/2014

Invoice #	Type	Invoice Date	Due Date	Service Period	Prev. Balance	Payments + Adjustments	Invoice Amount	Amount Due
	Payment			6/23/2014		\$78.44		\$149.17
	Payment			5/27/2014		\$100.00		\$227.61
	Payment			5/12/2014		\$19.54		\$327.61
		5/6/2014	6/5/2014	4/4/2014 - 5/6/2014	\$316.04	\$0.00	\$31.11	\$347.15
		4/4/2014	5/4/2014	3/6/2014 - 4/4/2014	\$279.77	\$0.00	\$36.27	\$316.04
		3/6/2014	4/5/2014	2/3/2014 - 3/6/2014	\$236.91	\$11.51	\$54.37	\$279.77
	Payment			4/28/2014		\$11.51		\$225.40
	Late Fee	2/7/2014	1/27/2014	12/4/2013 - 1/3/2014	\$239.45	\$0.00	(\$2.54)	\$236.91
		2/4/2014	3/6/2014	1/3/2014 - 2/3/2014	\$129.47	\$0.00	\$109.98	\$239.45
	Late Fee	1/27/2014	1/27/2014	12/4/2013 - 1/3/2014	\$146.69	\$19.76	\$2.54	\$129.47
	Payment			1/10/2014		\$19.76		\$126.93
		1/3/2014	1/23/2014	12/4/2013 - 1/3/2014	\$0.00	\$0.00	\$146.69	\$146.69

REDACTED

Search: Account No: [Redacted] Customers: [Redacted] Logout

Workspace Administration Menu Activity Report Menu Customer Search

[Redacted] (Residential) [Redacted] (Residential)

Gas Service (Inactive)
 Account #: [Redacted]
 Current Bill Due: 6/5/2014
 Current Balance: \$149.17

Common Tasks: New Call Post Payment Special Charge Letters How do I...?

Balance	Current	1-30	31-60	61-90	91-120	121+	AR Terms (Days)
\$149.17	\$0.00	\$0.00	\$31.11	\$36.27	\$54.37	\$27.42	30

Customer Info Utility Accounts (ESI / LDC) Communication Log AR / Billing Additional Info User Prefs

Search Call Notes: [Redacted] Search

ID	Date	Department	Type	Detail	Priority	Status	Opened By	Date Opened	Closed By	Date Closed	Service	Modified By	Note
[Redacted]	2/19/2014 9:28 AM	Havenlink	Bill Inquiries	Balance Due	Low	Open	[Redacted]	2/19/2014 9:28 AM			Gas	[Redacted]	[Redacted] called inquiring regarding the notification for late payment she received, customer stated that she already made payment arrangement with PG&E, requesting for an extension until 03/06/2014. Informed customer that her account for [Redacted] will be noted regarding the extension granted to her by PG&E. Customer okay d.
[Redacted]	11/12/2013 3:11 PM	None	Correspondence	Document Added to Account	Low	Closed	System User	11/12/2013 3:11 PM			Gas		Contract Letter mailed on Friday, November 08, 2013. [View]
[Redacted]	11/12/2013 3:11 PM	None	Correspondence	Document Added to Account	Low	Closed	System User	11/12/2013 3:11 PM			Gas		Contract Letter mailed on Friday, November 08, 2013. [View]
[Redacted]	11/7/2013 7:45 PM	Enrollment	Payment	B2B Payment	Low	Closed	System User	11/7/2013 7:45 PM	System User		Gas		Enrollment: TPV # [Redacted]

Expand all Memos.

SB_GT&S_0346143

REDACTED

Print AR History

Close

Account #: [REDACTED]

Date From: **March 31 2013** Date To: **July 31 2014**

AR Summary for: 3/31/2013 - 7/31/2014

Invoice #	Type	Invoice Date	Due Date	Service Period	Prev. Balance	Payments + Adjustments	Invoice Amount	Amount Due
	Payment			7/7/2014		\$249.42		\$57.59
	Payment			6/24/2014		\$43.63		\$307.01
		3/31/2014	4/30/2014	2/28/2014 - 3/29/2014	\$292.84	\$0.00	\$58.00	\$350.84
		2/28/2014	3/20/2014	1/29/2014 - 2/28/2014	\$209.69	\$0.00	\$83.15	\$292.84
	Late Fee	2/7/2014	1/21/2014	11/26/2013 - 12/28/2013	\$212.07	\$0.00	(\$2.38)	\$209.69
		1/29/2014	2/28/2014	12/28/2013 - 1/29/2014	\$121.30	\$0.00	\$90.77	\$212.07
	Late Fee	1/21/2014	1/21/2014	11/26/2013 - 12/28/2013	\$118.92	\$0.00	\$2.38	\$121.30
		12/29/2013	1/17/2014	11/26/2013 - 12/28/2013	\$0.00	\$0.00	\$118.92	\$118.92

REDACTED

Search: Account No: [Redacted] Customers: [Redacted] Logout

Workspace Administration Menu Activity Report Menu Customer Search

[Redacted] (Residential) [Redacted] (Residential)

Account #: [Redacted]

Gas Service (Inactive)
 Current Bill Due: 4/30/2014
 Current Balance: \$57.59

Common Tasks: [New Call](#) [Post Payment](#) [Special Charge](#) [Letters](#) How do I...?

Balance	Current	1-30	31-60	61-90	91-120	121+	AR Terms (Days)
\$57.59	\$0.00	\$0.00	\$0.00	\$0.00	\$57.59	\$0.00	30

Customer Info Utility Accounts (ESI / LDC) Communication Log AR / Billing Additional Info User Prefs

Search Call Notes: [Redacted] Search

ID	Date	Department	Type	Detail	Priority	Status	Opened By	Date Opened	Closed By	Date Closed	Service	Modified	Note
[Redacted]	2/26/2014 1:37 PM	Havenlink	Receivables Mgmt	1st Call Attmp	Low	Open	[Redacted]	2/26/2014 1:37 PM			Gas	[Redacted]	OB Call. Spoke to [Redacted] Informed him of their past due balance of \$113.92. Customer said that he is on a payment plan with PG&E.
[Redacted]	2/19/2014 2:55 PM	IGS	Inbound Cancel	Pricing	Low	Open	[Redacted]	2/19/2014 2:55 PM			Gas	[Redacted]	CD IN TO CANCEL OFFERED 599TH CUST DECLINED RATE 699THM 11/16 BC ADV CUST 1-2 B/C BEFORE IGS IS REMOVED FROM THE BILL HE FELT HIS BILL WENT HIGHER
[Redacted]	10/30/2013 1:47 PM	None	Correspondence	Document Added to Account	Low	Closed	System User	10/30/2013 1:47 PM			Gas		Contract Letter mailed on Thursday, October 24, 2013. [View]
[Redacted]	10/30/2013 1:47 PM	None	Correspondence	Document Added to Account	Low	Closed	System User	10/30/2013 1:47 PM			Gas		Contract Letter mailed on Thursday, October 24, 2013. [View]
[Redacted]	10/23/2013 7:04 PM	Enrollment	Payment	B2B Payment	Low	Closed	System User	10/23/2013 7:04 PM	System User		Gas		Enrollment: TPV # [Redacted]

Expand all Memos.

SB_GT&S_0346145

REDACTED

Print AR History

Close

Account #: [REDACTED]

Date From: **March 31 2013**

Date To: **July 31 2014**

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AR Summary for: 3/31/2013 - 7/31/2014

Invoice #	Type	Invoice Date	Due Date	Service Period	Prev. Balance	Payments + Adjustments	Invoice Amount	Amount Due
	Payment			7/24/2014		\$65.19		\$0.00
	Payment			6/12/2014		\$57.71		\$65.19
	Payment			5/28/2014		\$170.00		\$122.90
	Payment			5/2/2014		\$44.68		\$292.90
	Payment			5/2/2014		\$14.32		\$337.58
	Payment			5/2/2014		\$3.12		\$351.90
	Payment			5/2/2014		\$45.00		\$355.02
	Payment			5/2/2014		\$45.00		\$400.02
		4/3/2014	5/3/2014	3/5/2014 - 4/3/2014	\$433.13	\$24.48	\$36.37	\$445.02
	Payment			4/1/2014		\$24.48		\$408.65
		3/5/2014	3/25/2014	2/1/2014 - 3/5/2014	\$352.73	\$0.00	\$80.40	\$433.13
	Late Fee	2/7/2014	1/26/2014	12/3/2013 - 1/1/2014	\$355.71	\$0.00	(\$2.98)	\$352.73
		2/2/2014	3/4/2014	1/1/2014 - 2/1/2014	\$233.93	\$0.00	\$121.78	\$355.71
	Late Fee	1/26/2014	1/26/2014	12/3/2013 - 1/1/2014	\$230.95	\$0.00	\$2.98	\$233.93
	Late Fee	1/9/2014	12/27/2013	10/31/2013 - 12/3/2013	\$232.59	\$0.00	(\$1.64)	\$230.95
		1/2/2014	1/22/2014	12/3/2013 - 1/1/2014	\$83.61	\$0.00	\$148.98	\$232.59
	Late Fee	12/27/2013	12/27/2013	10/31/2013 - 12/3/2013	\$81.97	\$0.00	\$1.64	\$83.61
		12/3/2013	12/23/2013	10/31/2013 - 12/3/2013	\$0.00	\$0.00	\$81.97	\$81.97

REDACTED

Search: Account No: [Redacted] Customers: [Redacted] Logout

Workspace Administration Menu Activity Report Menu Customer Search

[Redacted] (Residential) [Redacted] (Residential)

Gas Service (Inactive)
 Account #: [Redacted]
 Current Bill Due: 5/3/2014
 Current Balance: \$0.00

Common Tasks: [New Call](#) [Post Payment](#) [Special Charge](#) [Letters](#) How do I... ?

Balance	Current	1-30	31-60	61-90	91-120	121+	AR Terms (Days)
\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	30

Customer Info Utility Accounts (ESI / LDC) **Communication Log** AR / Billing Additional Info User Pref

Search Call Notes: [Redacted] Search ?

ID	Date	Department	Type	Detail	Priority	Status	Opened By	Date Opened	Closed By	Date Closed	Service	Modified By	Note
[Redacted]	3/10/2014 2:16 PM	IGS	Correspondence	Document Added to Account	Low	Open	[Redacted]	3/10/2014 2:16 PM			Gas	[Redacted]	linked contract
[Redacted]	2/26/2014 12:26 PM	Havenlink	Inbound Cancel	Pricing	Low	Open	[Redacted]	2/26/2014 12:26 PM			Gas	[Redacted]	OB Call. Spoke to [Redacted] Informed her that this account has a past due of \$230.95. Customer wants this account cancelled. Stated that there is an increase on her bill since she switched over to [Redacted] Informed her that I would process her cancellation request and provided her a confirmation number [Redacted] Advised her that it takes 1-2 billing cycles before PG&E can take over the account, based upon where the meter is at in the read cycle. Informed her of PG&E's 1-year stay policy. Customer OK'd.
Created by: [Redacted] Date Added: 2/26/2014 3:39 PM OB Call. Spoke [Redacted] She said that she is not paying the full balance on her PG&E bill because she is on a payment arrangement with them. Stated that there is a line item for our charges on the PG&E bill. She also said that she will be making a payment tomorrow.													
[Redacted]	10/10/2013 9:23 AM	None	Correspondence	Document Added to Account	Low	Closed	System User	10/10/2013 9:23 AM			Gas		Contract Letter mailed on Thursday, October 10, 2013. View
[Redacted]	10/10/2013 9:23 AM	None	Correspondence	Document Added to Account	Low	Closed	System User	10/10/2013 9:23 AM			Gas		Contract Letter mailed on Thursday, October 10, 2013. View
[Redacted]	10/9/2013 7:39 PM	Enrollment	Payment	B2B Payment	Low	Closed	System User	10/9/2013 7:39 PM	System User		Gas		Enrollment: TPV # [Redacted]

Expand all Memos.





SB GT&S_0346147



REDACTED

Print AR History

Close

Account #: [REDACTED]

Date From: **March 31 2013**  Date To: **July 31 2014**   View Results  Download CSV

AR Summary for: 3/31/2013 - 7/31/2014  

Invoice #	Type	Invoice Date	Due Date	Service Period	Prev. Balance	Payments + Adjustments	Invoice Amount	Amount Due
[REDACTED]		4/15/2014	5/15/2014	3/5/2014 - 4/3/2014	\$300.54	\$0.00	\$60.92	\$361.46
[REDACTED]		3/5/2014	3/25/2014	2/1/2014 - 3/5/2014	\$211.49	\$0.00	\$89.05	\$300.54
[REDACTED]	Late Fee	2/7/2014	1/26/2014	12/3/2013 - 1/1/2014	\$213.79	\$0.00	(\$2.30)	\$211.49
[REDACTED]		2/2/2014	3/4/2014	1/1/2014 - 2/1/2014	\$117.33	\$0.00	\$96.46	\$213.79
[REDACTED]	Late Fee	1/26/2014	1/26/2014	12/3/2013 - 1/1/2014	\$115.03	\$0.00	\$2.30	\$117.33
[REDACTED]		1/2/2014	1/22/2014	12/3/2013 - 1/1/2014	\$0.00	\$0.00	\$115.03	\$115.03

REDACTED

Search: Account No: [Redacted] Customers: [Redacted] Logout

Workspace Administration Menu Activity Report Menu Customer Search

[Redacted] Residential) [Redacted] Residential) >>

Gas Service (Inactive)
 Account #: [Redacted]
 Current Bill Due: 5/15/2014
 Current Balance: \$361.46

Common Tasks: [New Call](#) [Post Payment](#) [Special Charge](#) [Letters](#) How do I... ?

Balance	Current	1-30	31-60	61-90	91-120	121+	AR Terms (Days)
\$361.46	\$0.00	\$0.00	\$0.00	\$60.92	\$0.00	\$300.54	30

Customer Info Utility Accounts (ESI / LDC) **Communication Log** AR / Billing Additional Info User Prefs

Search Call Notes: [Redacted] Search

ID	Date	Department	Type	Detail	Priority	Status	Opened By	Date Opened	Closed By	Date Closed	Service	Modified By	Note
[Redacted]	2/26/2014 1:52 PM	Havenlink	Receivables Mgmt	1st Call Attended	Low	Open	[Redacted]	2/26/2014 1:52 PM			Gas	[Redacted]	OB Call. Spoke to [Redacted]. Informed him of their past due balance of \$211.49. Customer said that they have already paid their PG&E bill for this month.
Created by: [Redacted] Date Added: 2/26/2014 3:49 PM OB Call. Spoke to [Redacted]. She said that she is on a payment arrangement with PG&E and she is allowed to pay half her balance monthly. She mentioned that she is not sure if it shows a line item for our charges on the invoice. Stated that payment has been made last 2/1/2014.													
[Redacted]	10/30/2013 1:40 PM	None	Correspondence	Document Added to Account	Low	Closed	System User	10/30/2013 1:40 PM			Gas		Contract Letter mailed on Thursday, October 17, 2013. [View]
[Redacted]	10/30/2013 1:40 PM	None	Correspondence	Document Added to Account	Low	Closed	System User	10/30/2013 1:40 PM			Gas		Contract Letter mailed on Thursday, October 17, 2013. [View]
[Redacted]	10/16/2013 9:55 PM	Enrollment	Payment	B2B Payment	Low	Closed	System User	10/16/2013 9:55 PM	System User		Gas		Enrollment: TPV # [Redacted]

Expand all Memos.

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