

Account Events guide

Last Modified on 12/18/2025 2:22 pm EST

Account Events: Understanding the Account Timeline

Every action and interaction on a customer account is recorded as an "event" in Kraken's account timeline. This guide explains the different types of events, what they mean, and how to use them effectively.

What Are Account Events?

Account events are time-stamped records of everything that happens on a customer account. They appear in the account timeline in chronological order (most recent first) and create a complete history of the account.

Why events matter:

- Provide complete account history at a glance
- Help resolve disputes by showing what happened and when
- Track customer interactions and communications
- Enable accountability and auditing
- Assist with troubleshooting issues

Where to find them: Navigate to any customer account and look for the "Timeline" or "Activity" tab. Events are listed with newest events at the top.

Event Categories

Kraken tracks dozens of different event types, organized into main categories:

1. Billing Events

2. Payment Events

3. Communication Events

4. Account Maintenance Events

5. Service Events

6. Meter Events

7. System Events

8. Note Events

Billing Events

These events relate to bill generation and billing adjustments.

Bill Generated

What it means: A new bill was created for the customer

Event details show:

- Bill number
- Billing period dates
- Total amount due
- Due date
- kWh usage for the period

Icon: 📄 Document icon

Example:

```
Bill Generated
12/15/2024 2:14 AM
Bill #123456 generated for period 11/15-12/15
Amount: $156.78 | Usage: 850 kWh | Due: 01/05/2025
```

Bill Adjustment

What it means: A credit or charge was manually applied to a bill

Event details show:

- Adjustment amount
- Reason for adjustment
- Agent who made the adjustment
- Bill affected

Icon: 💰 Money with wings

Example:

```
Bill Adjustment
12/16/2024 3:22 PM | Agent: Sarah M.
Credit applied: -$50.00
Reason: Goodwill credit for service inconvenience
Applied to Bill #123456
```

Estimated Bill Notice

What it means: Bill was generated using estimated usage instead of actual meter reading

Event details show:

- Billing period
- Estimated amount
- Reason for estimation
- Next scheduled actual read date

Icon: ⚠ Warning triangle

Example:

Estimated Bill Notice
12/15/2024 2:14 AM
Bill based on estimated usage due to meter access issue
Estimated usage: 800 kWh
Next actual read scheduled: 01/15/2025

Rate Change Applied

What it means: Customer's rate plan or pricing changed

Event details show:

- Previous rate
- New rate
- Effective date
- Reason for change

Icon: 📊 Chart

Example:

Rate Change Applied
12/01/2024 12:00 AM | System
Rate changed from Standard to Time-of-Use
Previous: \$0.12/kWh | New: Peak \$0.18, Off-peak \$0.09
Reason: Customer enrollment

Payment Events

These events track all payment activity on the account.

Payment Received

What it means: A payment was successfully processed

Event details show:

- Payment amount
- Payment method (card, check, ACH, etc.)
- Confirmation number
- Date processed
- Applied to which bill(s)

Icon: ✅ Green checkmark

Example:

Payment Received
12/18/2024 9:45 AM
Amount: \$156.78
Method: Visa ending in 4532
Confirmation: PAY789456123
Applied to Bill #123456

Payment Failed

What it means: A payment attempt was unsuccessful

Event details show:

- Payment amount attempted
- Payment method
- Reason for failure
- Date of attempt

Icon:  Red X

Example:

Payment Failed
12/18/2024 10:15 AM
Amount: \$156.78
Method: ACH Bank of America
Reason: Insufficient funds

Payment Arrangement Created

What it means: Customer enrolled in a payment plan

Event details show:

- Down payment amount
- Installment amounts and frequency
- Number of payments
- Start and end dates
- Agent who set it up

Icon:  Calendar

Example:

Payment Arrangement Created
12/18/2024 2:30 PM | Agent: Mike R.
Down payment: \$75.00
6 monthly installments of \$50.00
Start: 01/05/2025 | End: 06/05/2025
Total arrangement: \$375.00

Refund Issued

What it means: Money was refunded to the customer

Event details show:

- Refund amount
- Refund method
- Reason for refund
- Processing date
- Expected receipt date

Icon:  Money bag

Example:

Refund Issued
12/19/2024 11:00 AM | Agent: Lisa K.
Amount: \$42.50
Method: Check mailed to billing address
Reason: Account overpayment after final bill
Expected delivery: 12/26/2024

Auto-Pay Enabled/Disabled

What it means: Customer turned auto-pay on or off

Event details show:

- Action taken (enabled/disabled)
- Payment method enrolled
- Who made the change (customer or agent)

Icon:  Refresh arrows

Example:

Auto-Pay Enabled
12/19/2024 3:15 PM | Customer via portal
Payment method: Mastercard ending in 7890
Payments will process automatically on due date

Communication Events

These events track all correspondence with the customer.

Email Sent

What it means: An email was sent to the customer

Event details show:

- Subject line
- Recipient email address
- Template used (if applicable)
- Agent who sent it

- Delivery status

Icon: ✉ Envelope

Example:

Email Sent
12/18/2024 4:30 PM | Agent: David T.
To: customer@email.com
Subject: Your December Bill is Ready
Status: Delivered

Email Received

What it means: Customer sent an email to Good Egg Energy

Event details show:

- Sender email address
- Subject line
- Date received
- Case created (if applicable)

Icon: 📁 Inbox

Example:

Email Received
12/19/2024 8:15 AM
From: customer@email.com
Subject: Question about my bill
Case #98765 created and assigned to billing team

SMS Sent

What it means: A text message was sent to the customer

Event details show:

- Phone number
- Message content
- Delivery status

Icon: 🗣 Speech bubble

Example:

SMS Sent
12/17/2024 9:00 AM | System
To: (555) 123-4567
Message: "Your bill is ready. Amount due: \$156.78. Due date: 01/05"
Status: Delivered

Phone Call Logged

What it means: A phone conversation with the customer was documented

Event details show:

- Call direction (inbound/outbound)
- Duration
- Agent who handled the call
- Call summary

Icon: ☎ Phone

Example:

Phone Call - Inbound
12/18/2024 10:30 AM | Agent: Jennifer L. | Duration: 12 min
Summary: Customer called with question about higher bill.
Explained seasonal usage increase. Customer satisfied.

Letter Mailed

What it means: A physical letter was sent to the customer

Event details show:

- Letter type
- Mailing address
- Date mailed
- Expected delivery date

Icon: 📧 Mailbox

Example:

Letter Mailed
12/16/2024 | System
Type: Disconnection Notice - Final Warning
Mailed to: 123 Main St, Springfield, IL 62701
Expected delivery: 12/20/2024

Account Maintenance Events

These events track changes to account settings and information.

Contact Information Updated

What it means: Phone, email, or address was changed

Event details show:

- What was changed
- Previous value
- New value
- Who made the change

Icon:  Pencil and paper

Example:

Contact Information Updated
12/19/2024 1:45 PM | Agent: Tom S.
Email address changed
Previous: oldemail@example.com
New: newemail@example.com
Verified with customer

Billing Preference Changed

What it means: Customer switched between paper and paperless billing

Event details show:

- Previous preference
- New preference
- Who made the change
- Effective date

Icon:  Switch icon

Example:

Billing Preference Changed
12/19/2024 2:00 PM | Customer via portal
Changed from: Paper billing
Changed to: Paperless billing
\$2/month credit will apply starting next bill

Authorized User Added

What it means: Someone was granted access to the account

Event details show:

- Authorized user name and email
- Permission level granted
- Who added them
- Date added

Icon:  Person icon with plus

Example:

Authorized User Added
12/20/2024 10:15 AM | Agent: Rachel P.
User added: John Smith (john.smith@email.com)
Permission level: Full access
Invitation email sent

Authorized User Removed

What it means: Someone's account access was revoked

Event details show:

- User removed
- Who removed them
- Reason (if provided)

Icon:  Person icon with minus

Example:

Authorized User Removed
12/20/2024 11:30 AM | Primary Account Holder
User removed: Jane Doe
Reason: No longer needs access

Password Reset

What it means: Customer or agent reset the account password

Event details show:

- Reset method (self-service or agent-assisted)
- Date and time
- Success/failure status

Icon:  Key

Example:

Password Reset
12/21/2024 8:00 AM | Customer self-service
Reset link sent to: customer@email.com
Password successfully changed at 8:05 AM

Service Events

These events relate to physical service and account status.

Service Start

What it means: Electricity service was connected at the address

Event details show:

- Service start date
- Initial meter reading
- Rate plan assigned
- Move-in details

Icon:  Lightning bolt

Example:

Service Start
12/01/2024 | Field Tech: Carlos M.
Service connected at 123 Main St
Initial meter read: 54321
Rate plan: Standard residential
Customer move-in completed

Service Stop

What it means: Electricity service was disconnected

Event details show:

- Disconnect date
- Final meter reading
- Reason for disconnect
- Final bill status

Icon:  Unplugged

Example:

Service Stop
12/15/2024 | Field Tech: Amy K.
Service disconnected at 123 Main St
Final meter read: 58765
Reason: Customer move-out
Final bill generated: Bill #123499

Service Disconnected - Non-Payment

What it means: Service was shut off due to unpaid bills

Event details show:

- Disconnect date
- Amount owed at disconnect
- Notice sent dates
- Reconnection requirements

Icon:  Stop sign

Example:

Service Disconnected - Non-Payment
12/22/2024 | Field Tech: Robert L.
Service disconnected for non-payment
Past due amount: \$487.32
Reconnection requires: Full payment + \$45 reconnection fee

Service Reconnected

What it means: Service was restored after disconnection

Event details show:

- Reconnection date
- Payment received that triggered reconnection
- Reconnection fee charged
- New meter reading

Icon:  Power icon with checkmark

Example:

Service Reconnected
12/23/2024 | Field Tech: Robert L.
Service restored at 123 Main St
Payment received: \$532.32 (includes reconnection fee)
Meter read at reconnection: 58800

Service Appointment Scheduled

What it means: A field visit was scheduled

Event details show:

- Appointment date and time window
- Service type needed
- Special instructions
- Customer contact preference

Icon:  Calendar with clock

Example:

Service Appointment Scheduled
12/20/2024 | Agent: Nicole B.
Appointment: 12/28/2024, 8 AM - 12 PM
Service type: Meter investigation
Special notes: Dog in backyard, customer will secure
Contact: Call 30 min before arrival

Meter Events

These events relate to meter readings and meter equipment.

Meter Read - Actual

What it means: A physical or smart meter reading was obtained

Event details show:

- Read date
- Meter reading value
- Read method (smart meter, field read, customer-provided)
- Usage since last read

Icon:  Meter gauge

Example:

Meter Read - Actual
12/15/2024 | Smart Meter
Reading: 58765
Previous read: 57915 (11/15/2024)
Usage: 850 kWh over 30 days

Meter Read - Estimated

What it means: Usage was estimated because actual read couldn't be obtained

Event details show:

- Estimate date
- Estimated reading
- Reason for estimation
- Estimate methodology

Icon: ⚠ Gauge with warning

Example:

Meter Read - Estimated
12/15/2024 | System
Estimated reading: 58800
Reason: Meter access blocked
Based on: 12-month average daily usage (28.3 kWh/day)
Will correct on next actual read

Meter Test Requested

What it means: Customer or agent requested meter accuracy testing

Event details show:

- Request date
- Reason for test
- Who requested
- Scheduled test date

Icon: 🔍 Microscope

Example:

Meter Test Requested
12/18/2024 | Agent: Maria G.
Requested by: Customer
Reason: Customer disputes accuracy of usage readings
Test scheduled: 12/28/2024
Customer notified of \$50 test fee (refundable if meter faulty)

Meter Test Completed

What it means: Meter accuracy test results are available

Event details show:

- Test date
- Test results (pass/fail)
- Accuracy percentage
- Action taken

Icon:  or  depending on result

Example:

Meter Test Completed
12/28/2024 | Field Tech: David P.
Test result: PASS - Meter operating within tolerance
Accuracy: 99.8% (acceptable range: 98-102%)
Test fee: Waived (meter passed)
Customer notified of results

Smart Meter Installed

What it means: A smart meter was installed at the property

Event details show:

- Installation date
- Old meter number and final reading
- New meter number and initial reading
- Technician name

Icon:  Smart device

Example:

Smart Meter Installed
12/10/2024 | Field Tech: James R.
Old meter #123456 final read: 57500
New smart meter #789012 initial read: 57500
Automatic daily readings now enabled
Customer portal updated with real-time usage

System Events

These events are automatically generated by Kraken's automated processes.

Auto-Pay Processed

What it means: Automatic payment was processed on schedule

Event details show:

- Payment amount
- Payment method
- Bill paid
- Confirmation number

Icon: 🔄 Automatic

Example:

Auto-Pay Processed
12/05/2024 3:00 AM | System
Amount: \$156.78
Method: Visa ending in 4532
Bill #123456 paid in full
Confirmation: AUTO789456123

Late Fee Applied

What it means: System automatically added a late fee to past due balance

Event details show:

- Late fee amount
- Date applied
- Days past due
- New total balance

Icon: 📄 Fee icon

Example:

Late Fee Applied
12/06/2024 12:00 AM | System
Late fee: \$5.00
Applied to past due balance
Account 21 days past due
New balance: \$161.78

Paperless Credit Applied

What it means: Monthly credit for paperless billing was applied

Event details show:

- Credit amount
- Bill credited
- Paperless enrollment date

Icon: 🌿 Green leaf

Example:

Paperless Credit Applied
12/15/2024 | System
Credit: -\$2.00
Applied to Bill #123456
Enrolled in paperless since: 06/15/2024

Security Alert

What it means: Suspicious activity was detected

Event details show:

- Alert type
- Triggering action
- Date and time
- Action taken

Icon:  Lock with alert

Example:

Security Alert
12/21/2024 11:45 PM | System
Alert: Multiple failed login attempts (5)
IP address: [redacted]
Action: Account temporarily locked for 30 minutes
Customer notified via email

Note Events

These are manually added notes from agents and staff.

Agent Note Added

What it means: An agent documented an interaction or observation

Event details show:

- Note content
- Agent name
- Date and time
- Note category (if applicable)

Icon:  Note

Example:

Agent Note Added
12/18/2024 10:45 AM | Agent: Sarah M.
Category: Customer Service
Note: "Customer called about high bill. Reviewed usage breakdown showing 1,100 kWh vs usual 850 kWh. Explained colder November weather increased heating usage. Compared to same month last year (1,050 kWh). Customer understood and accepted explanation. Offered energy efficiency tips. No adjustment needed."

Supervisor Note Added

What it means: A supervisor documented a review or decision

Event details show:

- Note content

- Supervisor name
- Escalation reference (if applicable)

Icon: 🗒️ Clipboard with note

Example:

Supervisor Note Added
12/18/2024 2:30 PM | Supervisor: Tom H.
Note: "Reviewed billing dispute. Approved \$75 goodwill credit due to customer's excellent 5-year payment history and current financial hardship (job loss). Credit applied to account. Customer very appreciative."

Using Account Events Effectively

For Customer Service

Quick issue resolution:

- Scan timeline to understand account history
- Identify patterns or recurring issues
- See what was already tried or discussed

Avoiding repetition:

- Check notes before asking customer to re-explain
- Reference previous conversations
- Pick up where the last agent left off

Example:"I see you spoke with my colleague Sarah yesterday about your bill. She explained the usage increase was due to the cold weather. Are you calling with additional questions about that, or is there something else I can help with?"

For Dispute Investigation

Building a case:

- Document timeline of events
- Show billing history
- Demonstrate communication attempts
- Prove proper procedures were followed

Example use case:Customer claims they never received a disconnection notice. The timeline shows:

- 12/1: Account 30 days past due
- 12/5: Disconnection notice generated and mailed
- 12/10: Follow-up email sent
- 12/15: SMS reminder sent
- 12/20: Service disconnected

For Quality Assurance

Reviewing agent performance:

- Check that proper notes were added
- Verify procedures were followed
- Ensure customer interactions were documented
- Monitor resolution quality

For Troubleshooting

Identifying system issues:

- Look for patterns of failed payments
 - Spot unusual meter reading gaps
 - Find recurring communication failures
 - Detect system errors
-

Event Filtering and Search

Kraken allows you to filter events to find specific information:

Filter by:

- Event type (billing, payment, communication, etc.)
- Date range
- Agent name
- Event status
- Keywords in notes

Search tips:

- Use specific keywords (bill number, amount, date)
 - Narrow date ranges for faster results
 - Filter by category first, then search within results
 - Use exact phrases in quotes for precise matches
-

Best Practices

1. Review Timeline Before Contacting Customer

Understand the full account history before reaching out.

2. Add Detailed Notes

Your notes become events that help future agents. Be thorough.

3. Reference Previous Events

When documenting, reference related events: "Follow-up to note from 12/15"

4. Use Timeline for Verification

Check timeline to verify customer claims about prior interactions.

5. Monitor Recent Events

Look for recent activity that might relate to customer's current issue.

6. Document Investigation Steps

Add notes showing what you checked during an investigation.

7. Flag Important Events

Some events deserve special attention—note them clearly.

Quick Reference: Event Icons

IconEvent Type

- ☒ Bill generated
 - ☒ Payment successful
 - ☒ Payment failed
 - ✉ Email sent
 - ☒ Phone call
 - < Service started
 - ☒ Service stopped
 - ☒ Meter reading
 - ☒ Password reset
 - ☒ User added/removed
 - ☒ Note added
 - ⚠ Warning/Alert
 - ☒ Auto-pay activity
 - ☒ Fee or adjustment
-

The account timeline is one of the most powerful tools in Kraken. Use it to understand your customers better, resolve issues faster, and provide more personalized service.

Last updated: December 2024

Version: 1.0

Questions? Contact your supervisor or IT Support at ext. 3000
