

Account management: key actions

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Account management sits at the heart of almost every customer interaction. Whether you're setting up a new account, updating details, or closing one down, getting it right in Kraken first time saves a lot of headaches later – for the customer and for you. This guide covers the key actions you'll carry out most often.

Creating a new account

New accounts are typically created as part of the switching or move-in process. Before creating an account in Kraken, make sure you have:

- The customer's full name and date of birth
- A confirmed supply address and move-in date
- Contact details – at minimum an email address or phone number
- The customer's preferred billing method and payment type
- An opening meter reading if available

To create the account in Kraken:

1. Navigate to **Accounts** and select **Create new account**
2. Enter the customer's personal details and confirm the supply address
3. Add the relevant supply point – electricity, gas, or both
4. Set the tariff and billing preferences
5. Enter the opening meter reading if provided, or flag for an estimated opening read
6. Confirm payment setup – see [Direct debit management](#) if setting up a direct debit
7. Save the account and confirm the account number with the customer

Always read back the key details before saving – name, address, and supply start date – to catch any errors before they become a problem.

Updating account details

Customers frequently need to update their contact details, correspondence address, or personal information. Common updates include:

Change of name

Ask the customer to confirm their new name and the reason for the change. Update in Kraken under account settings. For a change due to marriage or legal name change, a note on the account is good practice.

Change of contact details

Update email address, phone number, or correspondence address under the customer's profile. Confirm the new details back to the customer before saving. If a customer is updating their address urgently and sounds distressed, be sensitive – this can sometimes indicate a domestic abuse situation. See [Safeguarding and escalation](#) for guidance.

Adding or removing an account user

Additional users can be added to an account to allow someone else – a family member or carer, for example – to discuss the account with us. Both parties should ideally be present or the account holder should give explicit verbal consent. Removing a user follows the same process in reverse – but take care if a removal request seems urgent or emotionally charged.

Closing an account

Accounts are closed when a customer moves out of a property, switches to another supplier, or in the event of a bereavement. The process varies slightly depending on the reason, but the core steps are:

1. Confirm the reason for closure and the closing date
2. Obtain a final meter reading – ideally customer-supplied and taken on the closing date
3. Generate the final bill in Kraken
4. Process any outstanding balance – refund credit to the customer or arrange payment of any remaining debt
5. Close the supply point and the account in Kraken
6. Confirm closure to the customer in writing

For move-outs, make sure the incoming customer or new supplier has the closing read – this prevents estimated opening reads and billing disputes down the line.

Bereavement accounts

Closing or transferring an account following a bereavement requires extra care. The person calling may be a family member or executor who is dealing with an enormous amount at once. Be patient, be kind, and make the process as simple as possible for them.

- You don't need a death certificate to begin the process – a verbal notification is enough to flag the account
- Waive any early exit fees where applicable
- If there is credit on the account, explain how it will be refunded and to whom
- If the property will be occupied by someone else, offer to set up a new account for them

Good to know: If you're ever unsure whether an account action is within your authorisation level – particularly for closures involving debt, disputed final reads, or unusual circumstances – check with your team leader before proceeding. It's much easier to pause and confirm than to unpick an account action that's gone through incorrectly.