

Balance Transfers - Route a Case-3538

A/R Balance Transfers

Introduction

Financial Services will **not** move money in order to achieve a current balance on **one statement** if money is owed **on both statements**

- A customer may request a balance transfer to **delay or prevent** a non-pay disconnect on one statement

Resolution Steps

- On the BOLT **General Ledger** tab, review **balance transfer** examples and route a case in these instances
 1. When transferring a **credit balance** from one statement to another
 - Example: Customer **merged statements** and has a credit balance on the **inactive statement**

2. To transfer a **posting error** from one statement to another
 - Example: Customer has **multiple statements** and **both** payments were applied to **one statement** instead of the individual statements

3. To transfer a balance **between accounts** when the accounts are in the **same name**
 - Example: Customer has **two accounts** and **both payments** were posted to **one account** instead of the individual accounts

- **Create a Case** by entering the information as described below and click **Submit**

| | |
|--------------------------|-------------------------------------|
| Record Type | Non Technical |
| Reason | Bill Invoice Question or Issue |
| Reason Detail | Billing Question / Inquiry |
| Select | Balance Transfer |
| Destination Queue | Financial Services (FS) |
| Notes | Valid contact name and phone number |

- **Back Office Financial Service Follow-up**
 - The BOLT case is completed in **2 business days**
 - If an **escalated situation** arises, **contact a resource** to escalate the account information to Financial services
 - When necessary, Financial Services contacts the customer

- The Case Comments are updated with the outcome

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