

UtiliSales

Training Manual

Y20078-TUM Rev B

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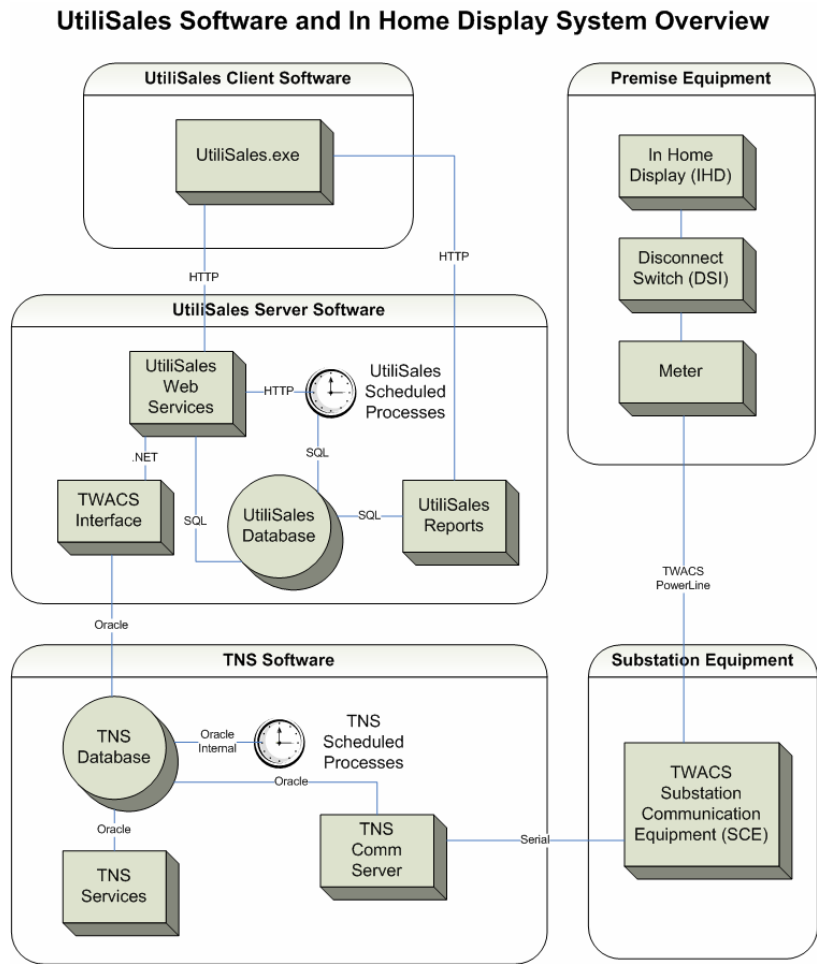
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OVERVIEW

This chapter provides an overview of the components of UtiliSales and operational definitions of status codes to be explained in subsequent chapters.

System Overview

The following image provides an overview of the various components of a TWACS UtiliSales deployment.



Components

UtiliSales is easy to use and versatile. UtiliSales utilizes XML Web services implemented through the Microsoft.NET architecture and couples those Web services with SQL Server stored procedures and a SQL Server database for better scalability and easier product deployment and updates. UtiliSales has four main components: the client interface, Web services, a SQL Server database, and stored procedures located on the SQL Server. This document will cover the minimum installation requirements and procedures and the functionality of the UtiliSales client interface.

Equipment/Software Requirements

Setting up the UtiliSales infrastructure requires the following:

- One or two server-class computers running Windows 2000 or Windows XP with the latest service packs and critical updates installed. If one server is used, then both the Web services and database will run from one machine. If two servers are used, the Web services will be run on one server and the database will reside on the other. The server running the Web services will need Internet Information Services (IIS) 5 with the latest service packs, the .NET Framework, and MDAC 2.7 installed. The server acting as the database repository requires Microsoft® SQL Server 2000 with the latest service packs, the .NET Framework, and MDAC 2.7 installed on it.
- A client machine running one of the following Microsoft® Windows® operating systems:
 - Microsoft® Windows® 98
 - 98 Second Edition
 - Millennium Edition (Windows Me)
 - NT® 4 (Workstation or Server) with Service Pack 6a, 2000 (Professional, Server, or Advanced Server)
 - XP (Home or Professional), and the Server 2003 family, all with the latest Windows Service Packs and critical updates.

Client machines also need the .NET Framework, the latest .NET Framework service packs, and MDAC 2.7 loaded on them.

Status Code Conventions and Definitions

| Code | Name | Description |
|----------|----------|--|
| P | Pending | This account is new. Adjustments can be made to this account, but no purchases, meter readings, or scheduled task will be processed while the account is in a Pending state. |
| A | Active | Normal account status. All functions can be performed against accounts with an Active status. |
| H | Hold | No purchases, meter reads, or scheduled tasks will be performed on an account in Hold status. Only adjustments can be made to accounts on Hold status. |
| I | Inactive | Customer has permanently moved out of the premise with a new customer ready to move in. |
| V | Vacant | Customer has permanently moved out of the premise without a new customer ready to move in. |

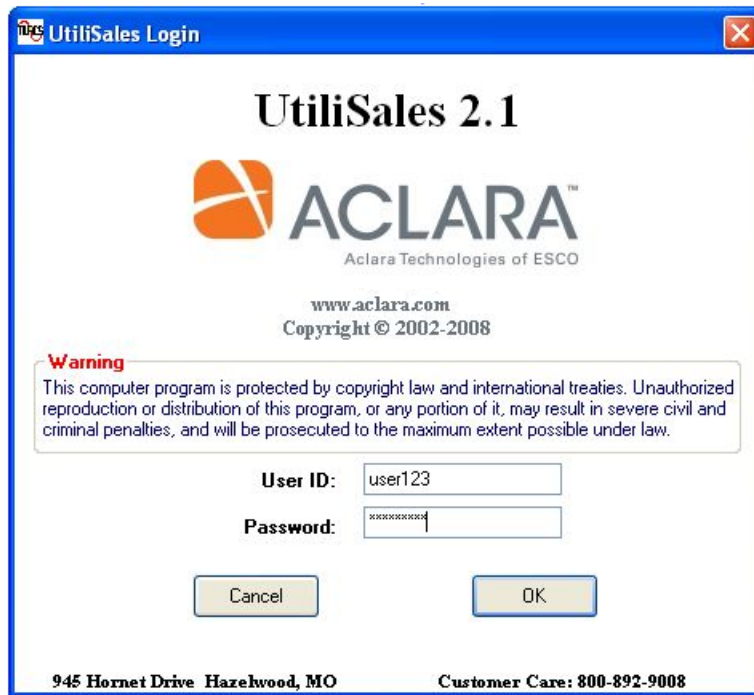
GET STARTED CREATING AN ACCOUNT

This chapter provides information on the basic operations necessary to launch the UtiliSales interface and search for account information by customer.

Logging In

Before you can access UtiliSales you need a user ID and password issued by either your system administrator or provided by Aclara. Use the following procedure to log in to UtiliSales.

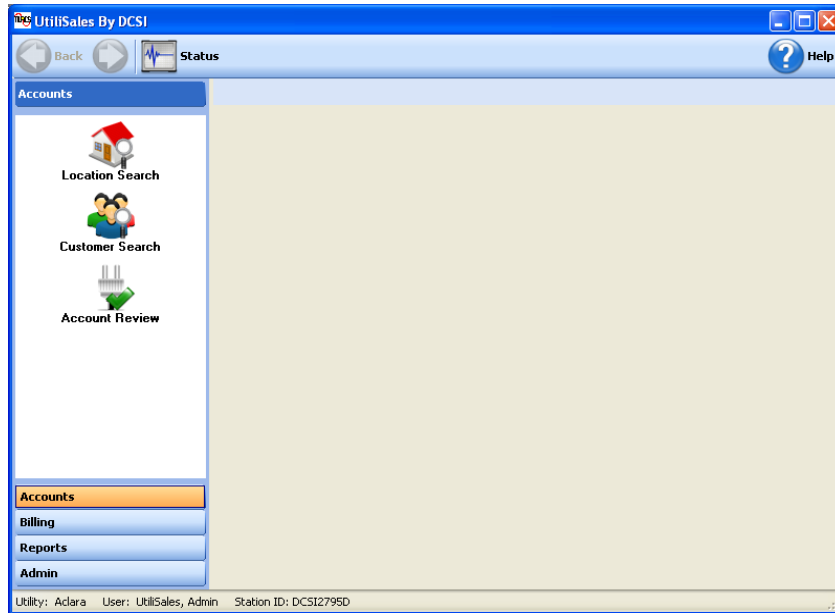
1. Double-click the Utilisales icon  on your Desktop to view the UtiliSales 2.1 Information Notification System window.



2. Enter your User ID and Password in their respective input fields, and click OK.

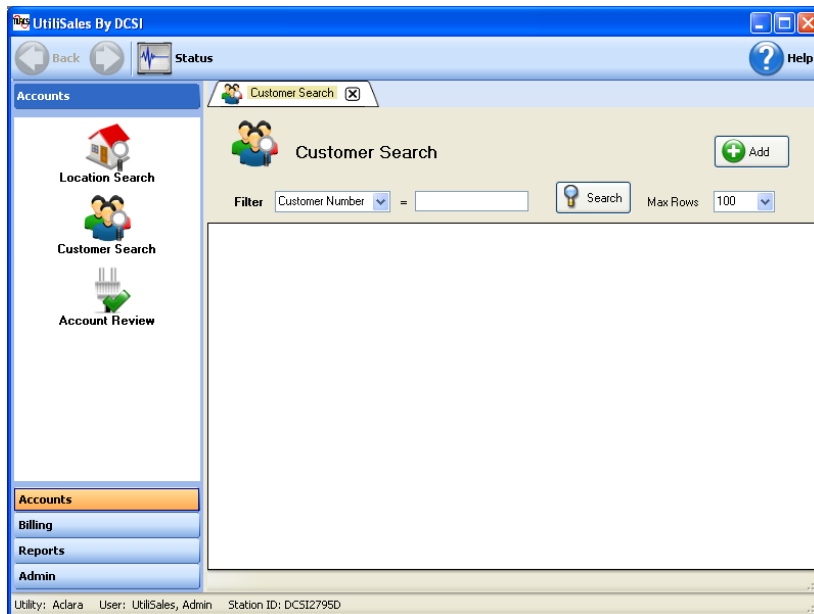
NOTE The access levels granted to you by your system administrator will dictate which functions of UtiliSales you can access.

The graphical interface resembles the following example:



Create New Customer

1. Navigate to Accounts, and click **Customer Search**.



2. Click the **Add** button to view customer information fields.

3. Enter the customer information including the 10-digit Customer Number.
4. Click **Save**.

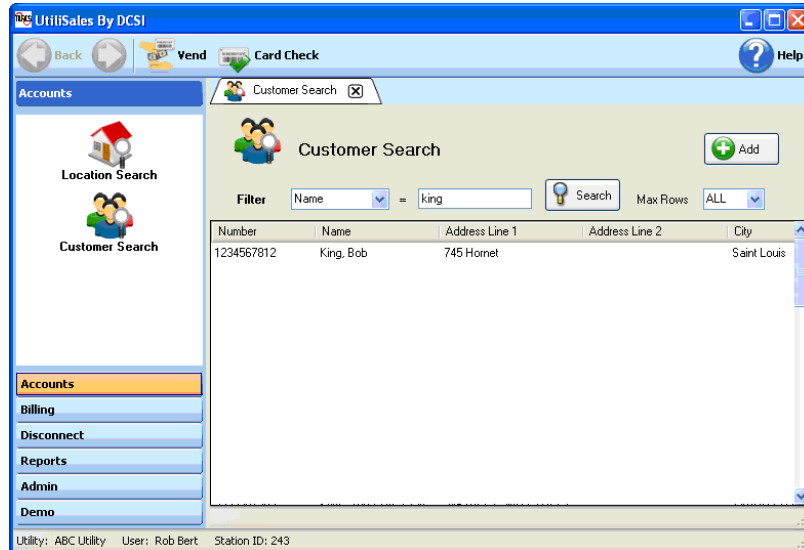
Move an existing customer into a new location

1. From the Customer Information tab, click **Operations**.
2. Click **Move into new location**.

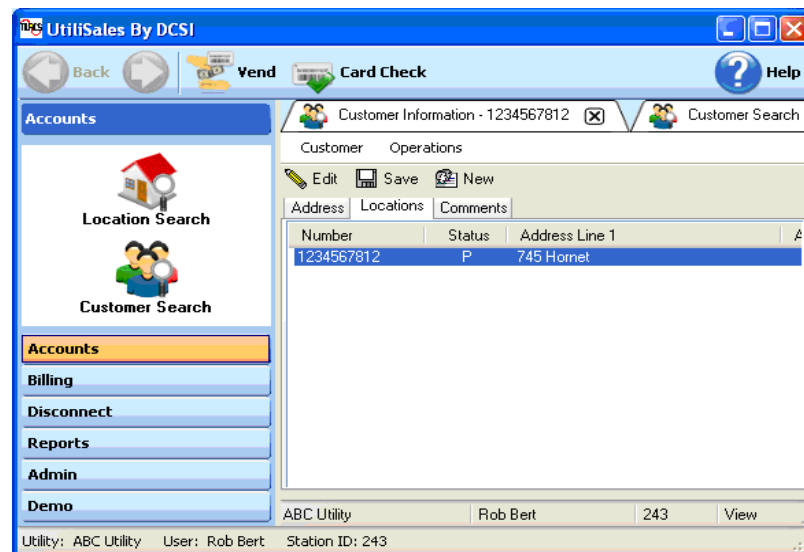
3. Enter the New Location Number (10 digits by default but length is adjustable through advanced settings), and click **OK**.

Set the Account Properties

1. Close the Customer Information tab.
2. On the Customer Search tab, click the drop-down arrow to the right of the Filter field, and click **Name**.



3. Double-click the customer.
4. Click the **Locations** tab.



5. Double-click the location.

- Click on the **Equipment Notification** tab within the location.

The screenshot shows the 'UtiliSales By DCSI' application window. The 'Equipment' tab is active, displaying fields for Meter ESN (12413454), DSI ESN (12413454), and Notification Services. The Primary Notification Service is set to 'In Home Display' with an address of '6005'. The Secondary and On Disconnect services are currently set to 'None'.

- Click the **Edit** button.
- In the Primary region of Notification Services click the drop-down arrow to the right of the Method field.
- Click **In Home Display**, and enter the IHD DSI in the Address field.
Click the **Change** button to the right of the Meter ESN field to view the Meter Change Out window.

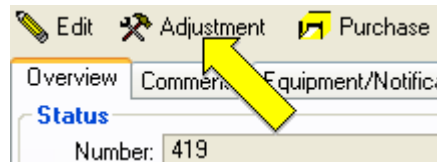
The 'MeterChangeout' dialog box is shown, divided into 'Current Information' and 'New Information' sections. The 'Current Information' section contains fields for Location Number (1234567812), Name (King, Bob), Meter Serial #, Meter Number, Begin Cycle Date (3/12/2007 2:06 PM), Begin Cycle Read (0.00), Last Reading (0.00), and Current Adj KWH (0.00). The 'New Information' section contains fields for Meter Serial #, Meter Number, Begin Cycle Date (3/12/2007 2:06:32), Begin Cycle Read, and Adjust KWH (0.00). 'Save' and 'Cancel' buttons are located at the bottom right.

- Enter the meter serial number, meter number, Begin Cycle Read, and Current Adj KWH for the account, and click **Save**.
- Enter the DSI ESN number.
- Click **Verify**.
- From the billing tab, you can select fixed charges and a billing cycle for this account. On the location, click **Save**, and click **Activate Account** from the Maintenance.

TRANSACTIONS

Set an Opening Balance for an Account.

1. Use the **Location Search** to identify the account.
2. Click **Adjustment** on the menu.



3. The **Make Account Adjustment** dialog box displays.

Adjustment Type

Fixed adjustments are applied entirely to the customer's long term debt

Priority adjustments represent the amount applied to the priority debt amount (the amount that must be paid in full before the customer can receive positive credit to the account; generally the minimum required to take payment.)

When the **Apply Immediately** checkbox is selected the amount posted to the balance becomes usable for consumption.

In essence, the Make Account Adjustment dialog box is a quick way to edit and populate fields that could be edited within the Account Overview screen.

| | |
|----------------------------|---------|
| Purchases: | \$0.00 |
| Adjustments: | \$0.00 |
| Disconnect Switch Status: | Error |
| Debt | |
| Priority Amount: | \$0.00 |
| Long Term Debt Amount: | \$1.00 |
| Debt Payoff Percentage: | 50.00 % |
| Last Purchase: None | |
| Amount: | 0 |
| Days Since: | 0 |

The Calculate Feature

The **Calculate** button enables you to see what amount will actually be written to a card after any debts are deducted from the amount presented without committing to the purchase.

Let's assume a customer has a \$20.00 Long Term Debt Amount and a Debt Payoff Percentage of 30%. If the customer presents \$30.00 to the cashier, then the cashier can tell the customer what their actual purchase will be before the card is written by clicking the **Calculate** button on the Account Purchase window. Just enter the amount presented in the Tendered Amount field and click the **Calculate** button. The Account Purchase dialog box shows \$21.00 put toward the customer's card and \$9.00 applied to their outstanding debt.

The screenshot shows the 'Account Purchase' dialog box with the following details:

- Location: 1546987088
- Customer: 2318957482
- PowerStat #: 0
- William Goodman
- 29 White Tail Lane
- O'Fallon, IL 62269

Debt Amount: \$20.00 30%

Priority Amount: \$0.00

Cash Check Credit Card

Tendered Amount: + \$30.00

Service Charge Amount: - \$0.00

Priority Amount: - \$0.00

Debt Amount: - \$9.00

Card Amount: = \$21.00

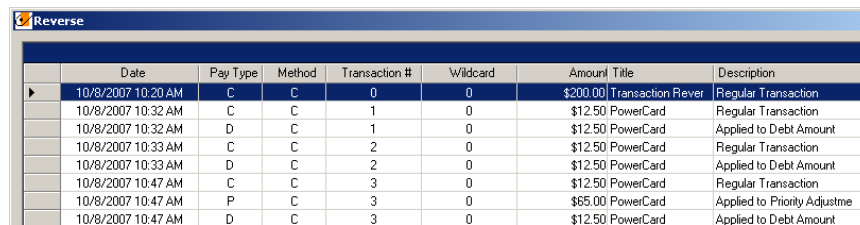
Buttons: Calculate, Cancel, Manual, Make Purchase

Transaction Reversals

UtiliSales offers the user the ability to reverse PowerCards and payments. If a customer put \$50.00 toward a PowerCard and then, before swiping the card through their PowerStat™ display, decided that they wanted to reduce the amount to \$20.00, the utility representative could reverse the transaction and write another card for \$20.00.

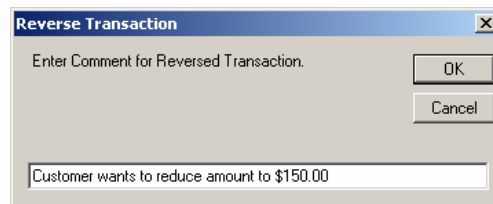
Use the following procedure to reverse a transaction.

1. Open the Location Information screen for the customer, click the **Maintenance** menu item, and then click **Reverse Transaction** to view the Reverse Transaction window.



| Date | Pay Type | Method | Transaction # | Wildcard | Amount | Title | Description |
|--------------------|----------|--------|---------------|----------|----------|----------------------|--------------------------------|
| 10/8/2007 10:20 AM | C | C | 0 | 0 | \$200.00 | Transaction Reversal | Regular Transaction |
| 10/8/2007 10:32 AM | C | C | 1 | 0 | \$12.50 | PowerCard | Regular Transaction |
| 10/8/2007 10:32 AM | D | C | 1 | 0 | \$12.50 | PowerCard | Applied to Debt Amount |
| 10/8/2007 10:33 AM | C | C | 2 | 0 | \$12.50 | PowerCard | Regular Transaction |
| 10/8/2007 10:33 AM | D | C | 2 | 0 | \$12.50 | PowerCard | Applied to Debt Amount |
| 10/8/2007 10:47 AM | C | C | 3 | 0 | \$12.50 | PowerCard | Regular Transaction |
| 10/8/2007 10:47 AM | P | C | 3 | 0 | \$65.00 | PowerCard | Applied to Priority Adjustment |
| 10/8/2007 10:47 AM | D | C | 3 | 0 | \$12.50 | PowerCard | Applied to Debt Amount |

2. Click the transaction you want to reverse, and then click the **Select** button to view a message box asking you to enter a comment.



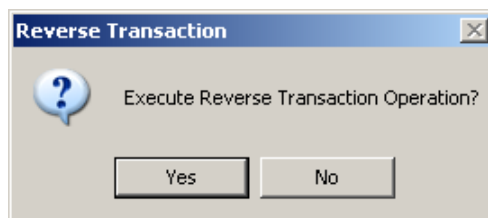
Reverse Transaction

Enter Comment for Reversed Transaction.

OK Cancel

Customer wants to reduce amount to \$150.00

3. Enter a comment, and then click the **OK** button to view another message box asking if you want to **Execute Reverse Transaction Operation?**

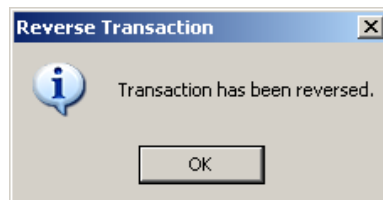


Reverse Transaction

Execute Reverse Transaction Operation?

Yes No

4. Click the **Yes** button to view the transaction reversal confirmation window.



Reverse Transaction

Transaction has been reversed.

OK

- Click the **OK** button. Pulling up the combined history for this account will then show a reverse transaction for the transaction you selected. Note that the transaction amount in the Amount column is negative and the Title column says **Reverse Transaction**.

Location Information - Account Number: 1546987088

Transaction Type: History Type

| Current Combined Transactions | | Number of Records Returned: 13 | | Max ID: 13 | | | | | |
|-------------------------------|--------------------|--------------------------------|------------|---------------|----------|-----------|---------|-------------------|---------------------|
| Number | Date | AdjustPay | Pay Method | Transaction # | Wildcard | Amount | Taxes | Title | Description |
| 1546987088 | 10/8/2007 10:20 AM | P | C | 0 | 0 | \$200.00 | \$7.69 | Transaction Rever | Regular Transacti |
| 1546987088 | 10/8/2007 10:28 AM | A | D | (null) | (null) | \$25.00 | \$0.00 | Bad Check Charg | Miscellaneous |
| 1546987088 | 10/8/2007 10:32 AM | P | D | 1 | 0 | \$12.50 | \$0.00 | PowerCard | Applied to Debt A |
| 1546987088 | 10/8/2007 10:32 AM | P | C | 1 | 0 | \$12.50 | \$0.48 | PowerCard | Regular Transacti |
| 1546987088 | 10/8/2007 10:33 AM | P | D | 2 | 0 | \$12.50 | \$0.00 | PowerCard | Applied to Debt A |
| 1546987088 | 10/8/2007 10:33 AM | P | C | 2 | 0 | \$12.50 | \$0.48 | PowerCard | Regular Transacti |
| 1546987088 | 10/8/2007 10:41 AM | A | P | (null) | (null) | \$40.00 | \$0.00 | Adjustment | Miscellaneous |
| 1546987088 | 10/8/2007 10:44 AM | A | D | (null) | (null) | \$25.00 | \$0.00 | Miscellaneous | Miscellaneous |
| 1546987088 | 10/8/2007 10:45 AM | A | P | (null) | (null) | \$25.00 | \$0.00 | Adjustment | Miscellaneous |
| 1546987088 | 10/8/2007 10:47 AM | P | D | 3 | 0 | \$12.50 | \$0.00 | PowerCard | Applied to Debt A |
| 1546987088 | 10/8/2007 10:47 AM | P | P | 3 | 0 | \$65.00 | \$0.00 | PowerCard | Applied to Priority |
| 1546987088 | 10/8/2007 10:47 AM | P | C | 3 | 0 | \$12.50 | \$0.48 | PowerCard | Regular Transacti |
| 1546987088 | 10/8/2007 12:45 PM | P | R | 0 | 0 | -\$200.00 | -\$7.69 | Reverse Transacti | Regular Transacti |

MAINTAINING ACCOUNTS IN LOCATION SEARCH

The Location Information Dialog Box

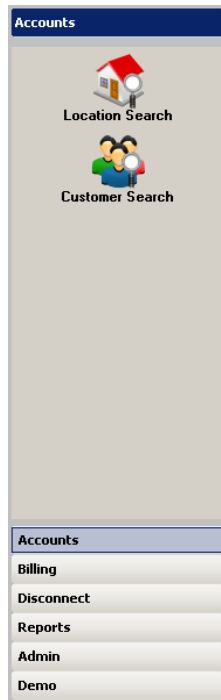
The Location Information screen shows all summary, address, billing, payment, equipment, and comment information and serves as a centralized interface for performing adjustments, payments, writing PowerCards, and viewing transaction histories.

Other functions that can be performed using the Location Information screen include the following: putting accounts on hold, writing duplicate card transactions, resetting accounts, processing customer response numbers, reversing transactions, meter and display change outs, moving customers in and out of locations, and changing the location number.

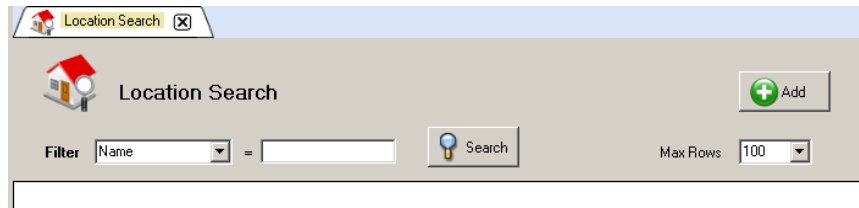
Searching for Locations

Use the following procedure to search for customer locations:

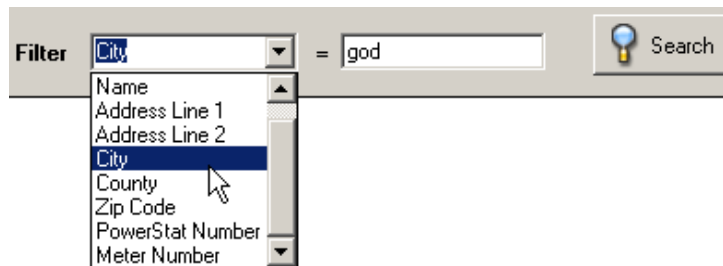
1. Open Utilisales, and click on the **Accounts** tab in the left column.



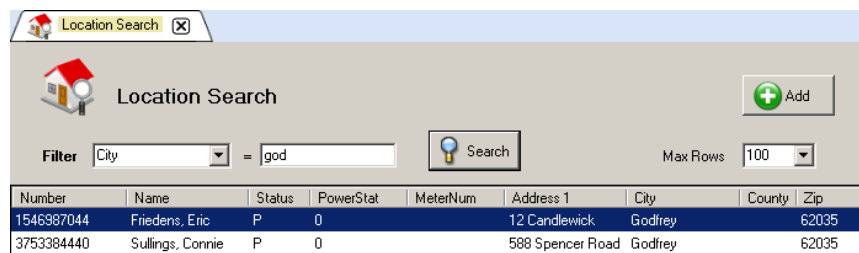
2. Click the **Location Search** icon to view the Location Search dialog box.



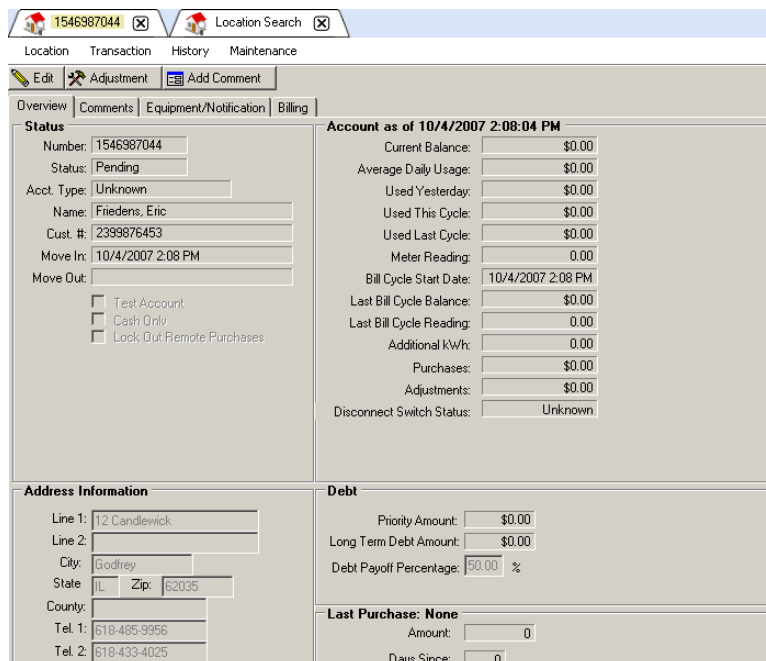
3. Select the location search criteria using the **Filters** drop down menu and enter an appropriate value in the open field.



Click the **Search** button to view the results matching your query display.

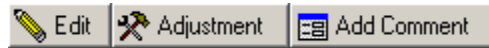


Double-click the appropriate record in the results pane to launch the Location Information dialog screen with additional information and editing capabilities.



Adjustments, Payments, PowerCards and Comments

All of the following functions can be launched from the menu at the top of the Location Information dialog.



Adjustments


Adding an adjustment to an account means adding a debt to the customer's account. That debt may be owed to the utility as the result of a bounced check, connection charges or some other fee determined by the utility. UtiliSales can process debts as either one aggregate debt or as multiple sub accounts sometimes called "debt buckets."

Your company determines which way UtiliSales handles debt when your UtiliSales system is installed. Independent of the way your company handles debt, the Overview tab displays Priority Amount and Long Term Debt Amount.


| Debt | |
|-------------------------|--------------------------------------|
| Priority Amount: | <input type="text" value="\$0.00"/> |
| Long Term Debt Amount: | <input type="text" value="\$0.00"/> |
| Debt Payoff Percentage: | <input type="text" value="50.00"/> % |

The Priority Amount debt is taken directly off the top of each PowerCard payment. For instance, if there is a \$10.00 priority debt and \$20.00 is tendered, \$10.00 will be taken off of the top and applied to the debt and \$10.00 will be applied to the PowerCard.

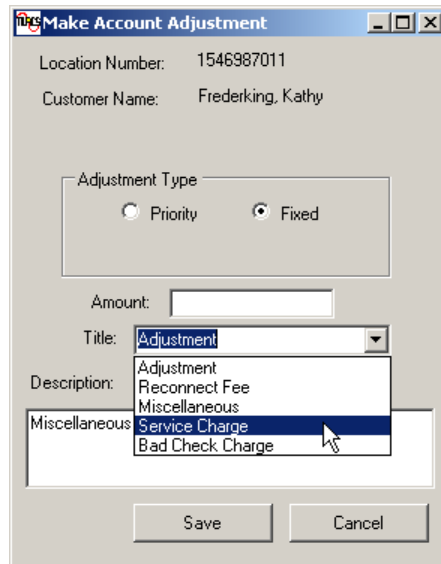
The Long Term Debt Amount is also known as fixed debt. This type of debt is taken off as a percentage of each PowerCard vended. For instance, if the debt payoff percentage is 25% and an amount of \$20.00 is tendered, \$5.00 will be put toward the debt and \$15.00 will be put toward the PowerCard. The percentage for payoff can be found on the Location Information screen under the Debt section as Debt Payoff Percentage.

The Debt Payoff Percentage can be changed from the Overview tab by clicking the **Edit**  button at the top, changing the Debt Payoff Percentage, and clicking **Save**.

Other adjustments, such as Reconnection Fees, Service Charges, and Bad Check

Charges can be quickly accessed by clicking the **Adjustment**  button in the Location Information dialog box.

This opens the Make Account Adjustment dialog box.

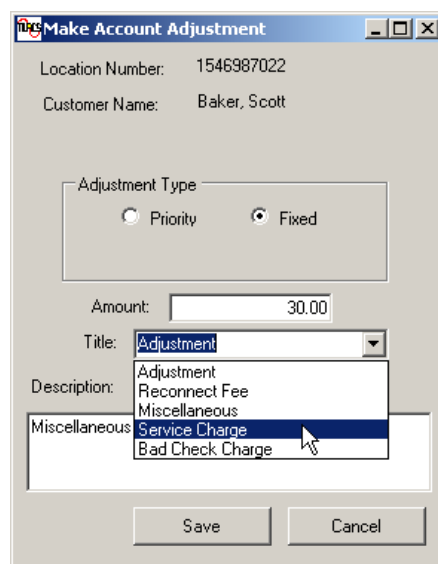


Debt

Debt processing is a straightforward procedure.

To add an adjustment to a location use the following procedure.

1. Open a Location Information dialog box for the desired customer.
2. Click the **Transaction** menu item at the top of the dialog box.
3. Click the **Adjustment** button in the top menu to view the Make Account Adjustment dialog box.



4. Select either the **Fixed** or **Priority** radio button.
5. Enter the amount of the adjustment in the Amount field.

6. Choose an appropriate title for the adjustment.
7. You may change the description if necessary.
8. Click the **Save** button.

Purchases

NOTE Payments may only be made on Active accounts.

To make payments toward debts use the following procedure.

1. Open a Location Information dialog box for the desired customer.
At the top menu click **Purchase** to view the Account Purchase dialog box.

2. Enter a payment amount in the Tendered Amount field.
3. Select the **Cash**, **Check**, or **Credit Card** radio button as appropriate.
4. Click the **Make Purchase** button.

Credits with the Account Payment Dialog Box

Credits can also be added to an account by using the Payment dialog box. A payment is counted as a credit (a positive balance) when there is not a debt to count the payment toward.

Enter Payment

Location Number: 1546987055

Customer Name: Riddle, Tom

Total Owed: \$0.00

Payment Amount: 45.00 Not Taxable

Payment Method

Cash Check Credit Card

Save Cancel

Once a payment has been made, a credit will show up on the Location Information dialog box in the Priority Amount field as an amount in parentheses.

Account Purchase

Location: 1546987055
Customer: 9562558741
PowerStat #: 0
Tom Riddle
18 Old Bend Road
Hartford, IL 62048

Debt Amount: \$0.00 50%

Priority Amount: (\$45.00)

Cash Check Credit Card

Tendered Amount: + \$0.00

Service Charge Amount: - \$0.00

Priority Amount: - \$0.00

Debt Amount: - \$0.00

Card Amount: = \$0.00

Calculate Cancel

Manual Make Purchase

UtiliSales, Admin StationID: 3

If a PowerCard is written while there is a credit a green box will appear around the words Priority Amount on the Account Purchase dialog box.

Adding Comments

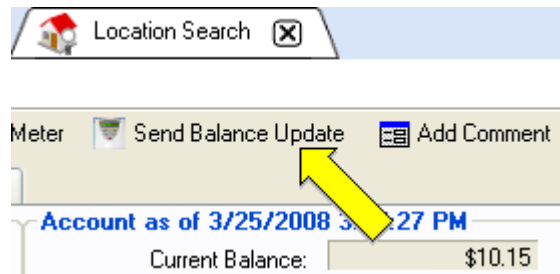
To add comments to a location open the Location Information window for the desired customer. Click the **Transaction** menu item at the top of the window, and then click **Add Comment**. Enter a comment up to 255 characters long and click the **OK** button.

By clicking on the **Comments** tab on the Location Information dialog box you can view all of the comments entered for this location.

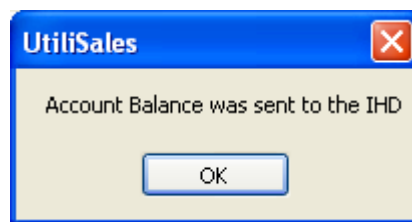
| Timestamp | Customer | Comment | User Name |
|-------------------|----------|--|-------------------|
| 3/25/2008 1:31 PM | 419 | Tree trimming crew dispatched. | UtiliSales, Admin |
| 3/25/2008 1:30 PM | 419 | Customer concerned about high blink count. | UtiliSales, Admin |
| 3/25/2008 9:19 AM | 419 | Activate Account | UtiliSales, Admin |

Send an Account Balance Update to an Account.

1. Click **Send Balance Update** from the location or customer's profile menu.

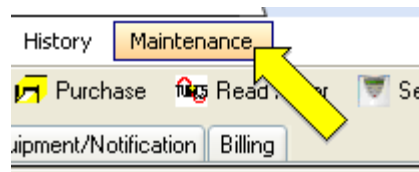


2. A message box confirms the account balance was sent.

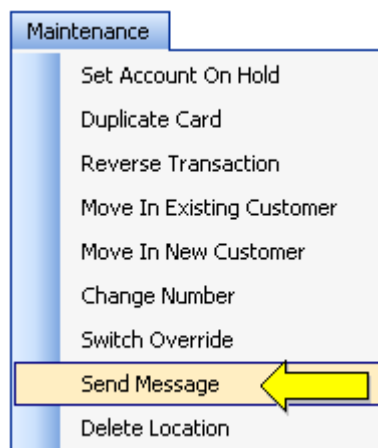


Send Message to an Account.

1. After opening an account using the Account Location dialog, click **Maintenance** in the submenu.



2. Click **Send Message** from the menu.



3. Click the **Text Message** radio button under Message Type Information.

Enter up to four message lines to include in the message.

4. Click **Send**.

| | Method | Address | Format |
|---|-----------------|---------|--------|
| <input checked="" type="checkbox"/> Primary | In Home Display | 419 | None |
| <input type="checkbox"/> Secondary | | | |
| <input type="checkbox"/> On Disconnect | | | |
| <input type="checkbox"/> Custom Email | | | |

If a Text messages was sent, the message will be the default screen on the IHD instead of the normal balance screen. The message persists until the message has been cleared by the utility administrator.

To clear a message

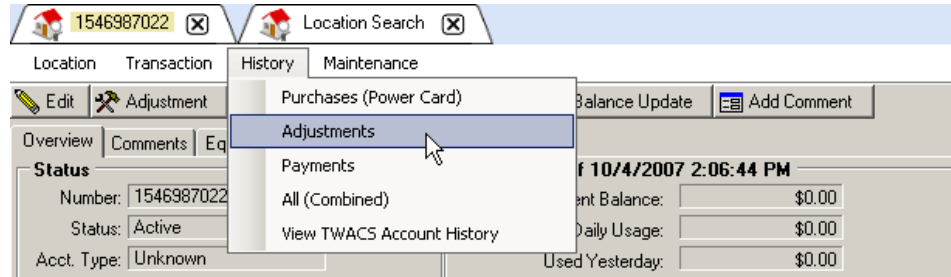
1. Open location.
2. Click **Maintenance** in the toolbar.
3. Click **Send Message**.
4. Click **Clear IHD**.
5. Click **Cancel** button or **X** button to close the window.

Transaction History

UtiliSales enables operators to view PowerCard adjustment and payment histories from both current and archived files. To access these click **Transaction** on the **Location Information** dialog box.

Location Transaction History Maintenance

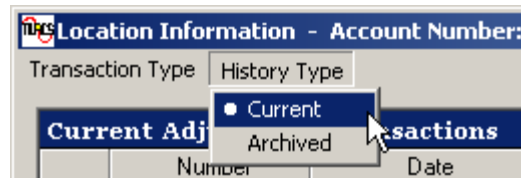
Click the type of history you would like to search.



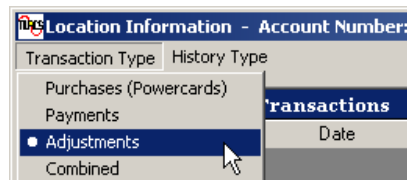
All (Combined) is a conglomerate of payment, adjustment, and PowerCard transactions. This initial query is pulled from current records. Once the history dialog is populated with the transaction records you have the option of doing another search based on either current or archived records and on any of the aforementioned transaction types.

To access additional records from this point you must do the following:

1. Click the **History Type** menu item at the top of the History dialog and select either Current or Archived.



2. Click the **Transaction Type** menu item at the top of the History dialog and select the type of transactions you want to view.

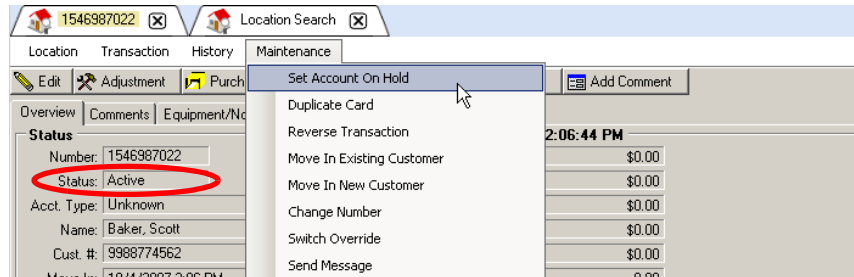


3. If you have chosen to search the **Current** records the search will be performed automatically once you have chosen the **Transaction Type**. If you want to search the same type of transaction you will need to re-select the transaction type to cause the program to run the query again. If you have chosen to search **Archived** records you will have to click the **Archive** button at the bottom.
4. If more than 100 records were found during the search the **Next 100** button will activate. To view the next 100 records click **Next 100**.
5. Notice that the caption bar above the data grid shows the type of transaction being shown in the grid and the number of records returned. Also notice that clicking the field headers, such as **Date**, will sort the records by that field either ascending or descending order.

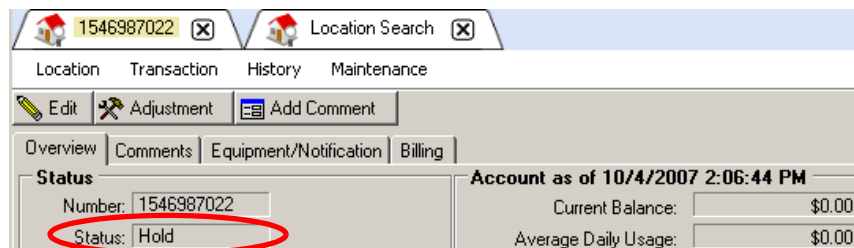
Setting Accounts On Hold

From the **Location Information** dialog box for a particular customer, use the following procedure to put an account on hold.

1. Click the **Maintenance** menu item at the top of the dialog box.



2. Click **Set Account On Hold**.
3. Notice that the **Status** field on the Location Information dialog box now displays **Hold**.



PowerCards cannot be written for this account until it is set back to Active status. Trying to write a PowerCard against this account will result in an error message saying **Account Not Active**.

Changing Accounts From Hold to Active Status

From the Location Information dialog box for a particular customer, use the following procedure to change the status of an account from **Hold** to **Active**.

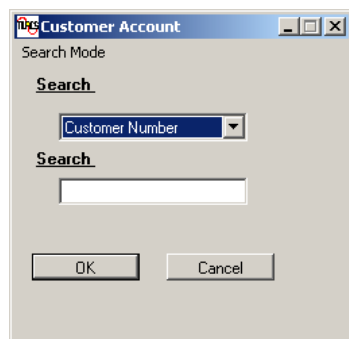
1. Click the **Maintenance** menu item at the top of the Location Information dialog box.
2. Click **Activate Account**. Notice that the **Status** field on the Location Information dialog box now indicates Active. PowerCards can now be written for this account.

Moving In An Existing Customer Using the Location Dialog Box

Using the **Move In Customer** function on the **Location Information** dialog is the same for both the version 3 and version 4 PowerStat™.

Use the following procedure to move a customer into a location. This procedure also moves the current customer out of the location.

1. Open the **Location Information** dialog for the location into which you want to move the customer.
2. Click **Maintenance**, then click **Move In Existing Customer** to view the Customer Search window.



3. Enter the search parameters for the customer you want to move in.
4. If there is only one customer that matches the search, that customer will automatically be moved in to the location. If more than one customer matches the search, a form listing all of the matches will appear. Choose the desired customer and click the **OK** button to move the customer into the location. Depending on the account number increment type used by your company, the location number for the new tenant may increase by one. Also, when a customer is moved in a record with the former tenant's information will remain in the database but with an Inactive ("I") account status and a PowerStat™ number of zero.

Moving In A New Customer Using the Location Dialog

Using the Move In Customer function on the Location Information dialog box is the same for both the version 3 and version 4 PowerStat™.

Use the following procedure to move a ne customer into a location. This procedure also moves the current customer out.

1. Open the **Location Information** dialog box for the location into which you want to move the customer.
2. Click **Maintenance**, then click **Move In New Customer** to enter the new customer's data.

The screenshot shows a window titled "Customer" with a "Save" button and an "Exit" button. Below the title bar is a tab labeled "Address". The form contains the following fields and values:

| | |
|-------------------|---------------------|
| Customer Number : | 6178007071 |
| Last Name : | Theodore |
| First Name : | Nugent |
| Address 1 : | 18 Wilderness Way |
| Address 2 : | |
| City : | Alton |
| State : | IL |
| Zip/Postal : | 62002 |
| County : | |
| Home Phone : | 618-444-7868 |
| Work Phone : | 618-433-4017 |
| Email : | tnugent@amwater.com |
| Language : | English |

3. Click **Save**.

Deleting A Location

Inadvertently deleting a location can cause information loss and create orphaned transaction records. Aclara recommends that access to this feature be limited to key personnel. Best practices dictate deleting only location records with an Inactive status.

Use the following procedure to delete a location.

1. Open the **Reset** for the location you want to delete.
2. Click the **Maintenance** menu item.
3. Click **Delete Location**.

4. The location has been deleted, although you will still be able to see the record in the main UtiliSales form. This is because the main form does not automatically update. To see the updated status click on another folder on the left-hand side of the main form (**Customers**, for instance) then click the **Locations** folder again. Notice that the record no longer exists. You can also perform another search through the **Location** menu item on the main UtiliSales interface. You can see through this search that the record has been deleted.

Move Out Customer Feature

The **Move Out Customer** feature might be used when a customer is permanently vacating a premises without a new customer ready to move in.

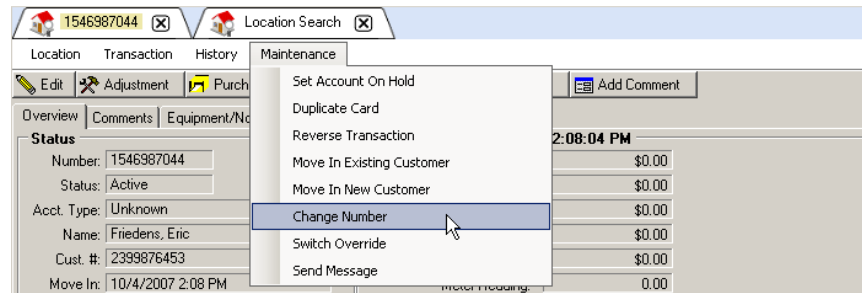
The Move Out Customer feature is used as follows:

1. On the UtiliSales Location Information dialog box select the **Maintenance** menu item at the top of the dialog.
2. Click **Move Out Customer** to view a message box that reads “This operation will remove the customer from this location. Are you sure?”
3. Click **Yes** to proceed. Notice that the customer’s status is changed to **Vacant**.

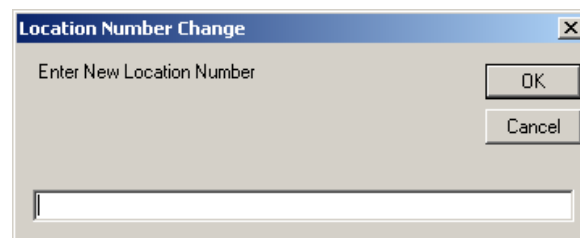
Change Location Number Feature

Use the following procedure to change a location number.

1. Open the Location Information dialog box for the location whose number you want to change.
2. Click on the **Maintenance** menu item at the top of the Location Information dialog box.



3. Click **Change Number** to view the Location Number Change window.



4. Enter the new number when prompted, and then click **OK**.

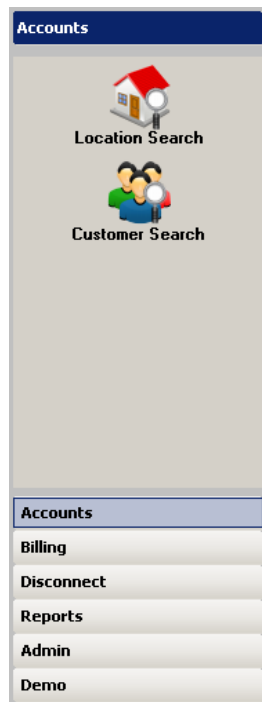
NOTE: Only users granted access permissions may change the location number.

CUSTOMER SEARCH

Viewing Customer Account Information

After logging in to UtiliSales, those operators with administrative permissions may search customer records. The Customer Information window displays information pertaining to the customer such as their customer number, name, address, telephone numbers, and email address. Use the following procedure to view customer account information.

1. The UtiliSales interface defaults to the open Accounts menu. If the Accounts Menu is not displayed, click the **Accounts** tab in the lower left corner of the screen.



UtiliSales operators may search customer accounts either by customer information or by location information.

2. Click the **Customer Search** icon to launch the Customer Search screen.

3. Enter as much of the customer's last name as you know into the Filter field and click **Search**. You can use partial names, but **do not** use wildcard characters such as * or ?.

| Number | Name | Address 1 | Address 2 | City | Count | Zip |
|------------|-------------------|------------------|-----------|---------|-------|-------|
| 5511481949 | Sanders, Barb... | 47 Lincoln Drive | | Grafton | | 62037 |
| 5511481944 | Sullings, Connie | 588 Spencer Road | | Godfrey | | 62035 |
| 5791552269 | Sullivan, William | 215 Center | | Alton | M... | 62002 |

4. Double-click the line for a specific customer in the results pane to view the Customer Information dialog box.

Customer Information dialog box details:

- Customer Number: 5511481949
- Last Name: Sanders
- First Name: Barbara
- Address 1: 47 Lincoln Drive
- Address 2: (empty)
- City: Grafton
- State: IL
- Zip/Postal: 62037
- County: (empty)
- Home Phone: 618-563-5589
- Work Phone: 618-433-1144
- Email: bsanders@amwater.com
- Language: English

Depending on your permission level, you may be able to **Edit** any of the critical information in the customer record, or you can open a **New** customer input screen using the menu bar.

Operations  Edit  New  Refresh  Exit

5. Click **Save** to save any changes.

NOTE If the information appears to be greyed out and unchangeable, you must switch to the Edit view to update record information fields.

6. There are three tabs on the Customer Information form: the **Address** tab, the **Locations** tab, and the **Comments** tab.

Address | Locations | Comments

The **Address** tab displays the customer's contact information.

The **Locations** tab shows locations associated with that customer. By double-clicking on a location, that location's information form appears. Notice that each location has a one-letter status designation.

Customer

Address | Locations | Comments

| Number | Status | Move In | Address 1 | Address 2 | City |
|------------|--------|------------------|------------|-----------|-------|
| 4164582225 | P | 10/2/2007 2:5... | 215 Center | | Alton |

The third tab is the **Comments** tab. Here you can view previously entered comments about that customer.

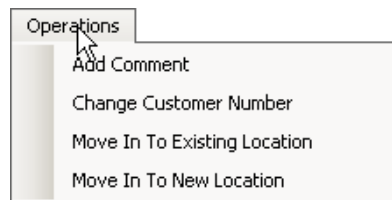
Customer

Address | Locations | Comments

| Date | Editor | Comment |
|-------------------|-------------------|--------------------------------|
| 10/2/2007 3:07 PM | UtiliSales, Admin | AP 9/27/2004 received by Ann P |

NOTE: Users may not see the Change Customer Number option if the user does not have permission to change the number.

7. Click the **Operations** menu item to display options allowing you to add a comment, change a customer number, move a customer into an existing location, and move a customer into a new location.



Create a New Location

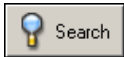

Use the following procedure to create a new customer-to-location relationship. You must first create a new customer.

1. On the main UtiliSales form, under the **Customer Search** tab, click **Add** to view a blank Customer Search window.
2. Enter the customer number and other pertinent information.
3. Click the **Save** button in the toolbar.

NOTE If a message box with the error message Invalid Customer Number Format appears this means that you have not entered the customer number as specified by your company. Once the customer number is saved you can no longer edit it. Operators with sufficient user permissions must click **Operations**, then **Change Number** to change the customer number.

Edit Customer Information

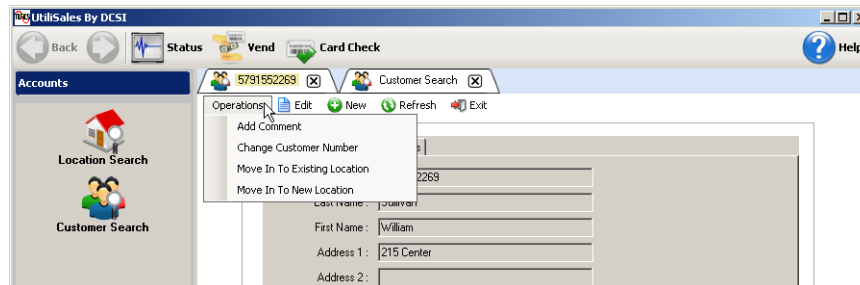
Use the following procedure to edit an existing customer's information.

1. Click the **Customer Search** icon located on the left side of the screen to view the Customer Search window.
2. Enter the appropriate search criteria in the Filter fields.
3. Click the Search button  to view the Customer Search results.
4. Double-click the customer whose number you want to change.
5. Click the **Edit**  button at the top of the dialog box. Notice that all text boxes change from gray to white. The white text boxes can be edited.
6. Click the **Save** button once you have made your changes.

Add Comment

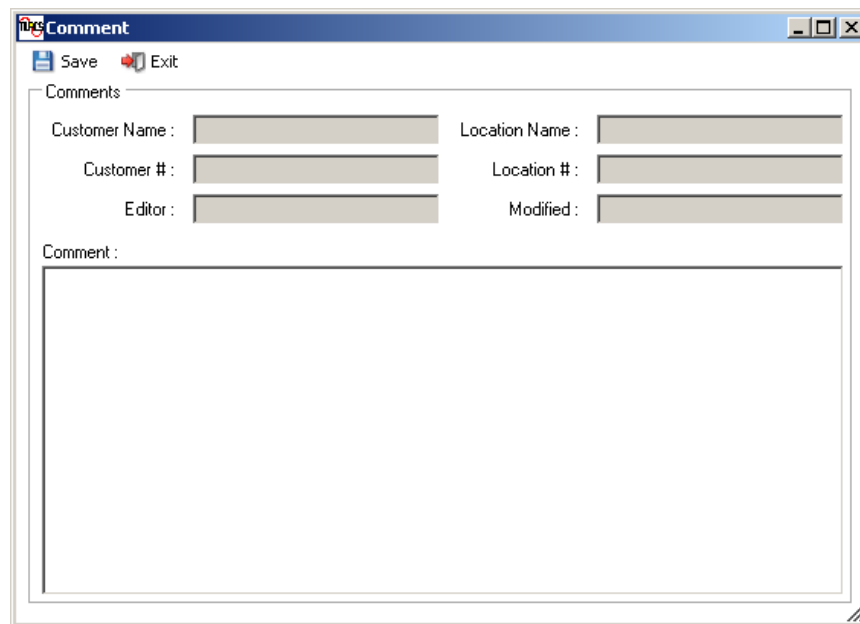
Use the following procedure to add a comment to the Customer Information dialog box.

1. Click the **Operations** menu item on the Customer Information dialog box.



NOTE: Customer information will not populate until after the comment is saved.

2. Click **Add Comment** to view the Comment box.



3. Enter the comment in the Comment field, and click **Save**.

| | | | |
|-----------------|-------------------|-----------------|----------------------|
| Customer Name : | William Sullivan | Location Name : | |
| Customer # : | 5791552269 | Location # : | |
| Editor : | UtiliSales, Admin | Modified : | 10/3/2007 8:16:00 AM |

Comment :

10/3/2007 Customer concerned about power outages.

Change Customer Number

Use the following procedure to change a customer number from the Customer Information dialog box.

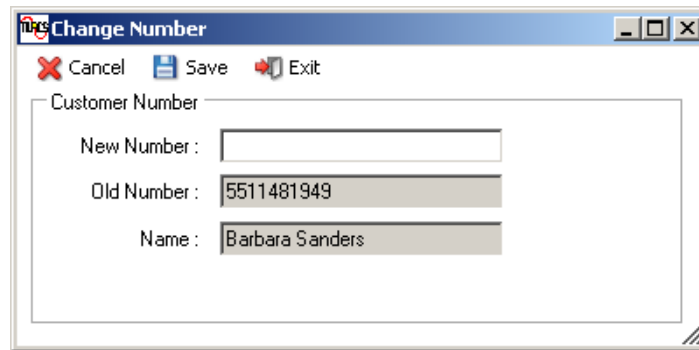
1. Open the Customer Information dialog box for the customer whose number you want to change.
2. Click the **Operations** menu item at the top of the Customer Information dialog box.

Operations

- Add Comment
- Change Customer Number**
- Move In To Existing Location
- Move In To New Location

Last Name: Sullivan
First Name: Barbara
Address 1: 47 Lincoln Drive
Address 2:

3. Click **Change Customer Number** to view the Change Number dialog box.



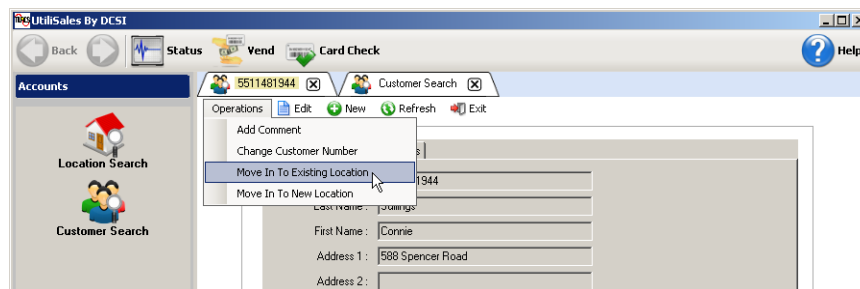
The 'Change Number' dialog box has a title bar with 'mfs Change Number' and standard window controls. Below the title bar are three buttons: 'Cancel' (with a red X icon), 'Save' (with a floppy disk icon), and 'Exit' (with a red arrow icon). The main area is titled 'Customer Number' and contains three input fields: 'New Number' (empty), 'Old Number' (containing '5511481944'), and 'Name' (containing 'Barbara Sanders').

4. Enter the new number in the New Number field, and click **Save**.

Move in to Existing Location

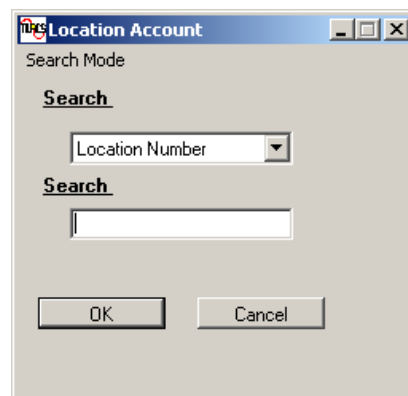
Use the following procedure to move a customer into an existing location.

1. Open the Customer Information dialog box for the customer whose number you want to change.
2. Click on the **Operations** menu item at the top of the Customer Information window.



The 'Customer Information' dialog box for customer '5511481944' is shown. The 'Operations' menu is open, displaying options: 'Add Comment', 'Change Customer Number', 'Move In To Existing Location' (highlighted by the mouse), and 'Move In To New Location'. The background shows fields for 'Last Name' (Johnings), 'First Name' (Connie), and 'Address 1' (588 Spencer Road).

3. Click **Move In to Existing Location** to view the Location Account dialog box.



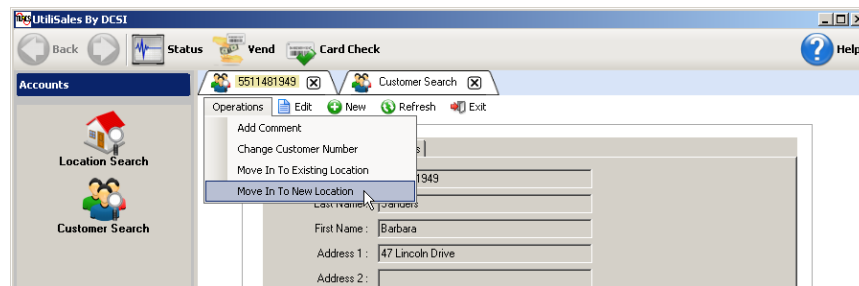
The 'Location Account' dialog box has a title bar with 'mfs Location Account' and standard window controls. It features a 'Search Mode' section with a 'Search' label. Below this is a dropdown menu set to 'Location Number' and an empty text input field. At the bottom are 'OK' and 'Cancel' buttons.

4. Enter the appropriate search criteria, and click **OK**. If there was only one account that matched the search the customer will automatically be moved into the location. If there were multiple accounts that matched the search, a dialog box will appear listing the accounts that matched the search criteria. Click on the appropriate account, and click the **OK** button. The customer is moved into the account.

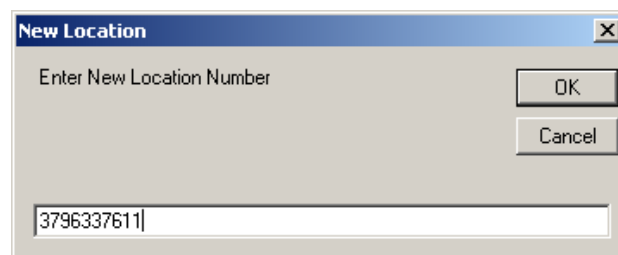
Move In To New Location

Use the following procedure to move a customer into a new location.

1. Click the **Operations** drop down on the Customer Information dialog box.



2. Click **Move In to New Location** to view an input box asking you to enter the location number for this new location.



NOTE The Location Number is a unique account number identifier. It may contain any combination of numbers, alphanumeric, or symbols. The only requirements is that it meets the established length and is unique to the system.

3. Enter the location number in the field, and click **OK**.
4. Click the **Locations** tab, and then double-click the location number you just entered to access the Overview information.

5. From here you can make changes to the location by clicking the **Edit**



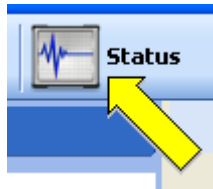
button. Notice that the Status field on the Status portion of the window displays “Pending”.

| Overview | Comments | Equipment/Notification | Billing |
|---------------|--|------------------------|---------|
| Status | | | |
| Number: | 3030300677 | | |
| Status: | Pending | | |
| Acct. Type: | Unknown | | |
| Name: | Sanders, Barbara | | |
| Cust. #: | 5511481949 | | |
| Move In: | 10/3/2007 10:48 AM | | |
| Move Out: | | | |
| | <input type="checkbox"/> Test Account | | |
| | <input type="checkbox"/> Cash Only | | |
| | <input type="checkbox"/> Lock Out Remote Purchases | | |

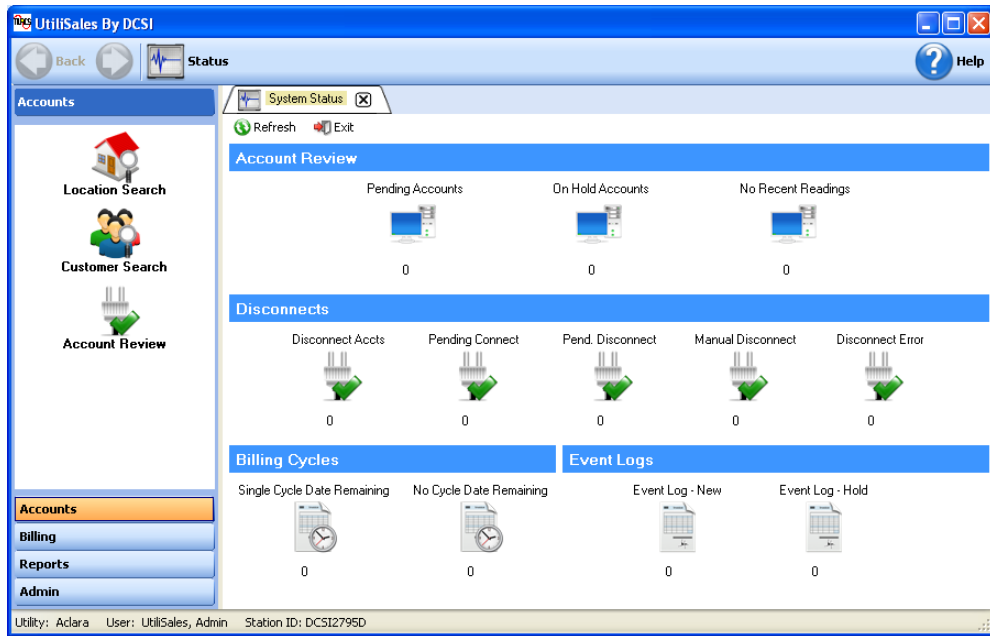
MONITORING: STATUS

Functions of the Status Screen

Click **Status** at top of screen.



The **Status** screen displays.



Use this screen to monitor UtiliSales system health and spot troubleshooting opportunities.

Account Review

Pending Accounts: Populates a list of accounts which have been created, but are presently inactive or awaiting installation of the IHD at the customer location.

On Hold Accounts: Populates a list of any accounts suspended from making purchases (e.g. NSF check). Issues must be resolved before the account is reactivated.

No Recent Readings: Reports all UtiliSales meters with no returns on last scheduled UtiliSales interval data collection task.

Disconnects

Disconnect Accounts: List all accounts which are currently disconnected.

Pending Connect: Lists accounts with a positive balance and a disconnect switch status with a status of “open-power off.” Issues and error messages appearing under this status must be addressed immediately.

Pending Disconnect: Lists accounts with a negative balance but disconnect switch status still reads “Closed-power on.” If disconnections are a scheduled task (Utility level) these will resolve after task runs.

Manual Disconnect: Lists accounts with the “manual disconnect” option selected. These accounts will not disconnect as the result of a scheduled task. These are the accounts for which a Utility has an interest in overseeing the manual disconnection of the account.

Disconnect Error: Lists any accounts UtiliSales is unable to sync with TNS to obtain the status of the DSI collar. All accounts with this error must be resolved through Service Disconnect within TNS.

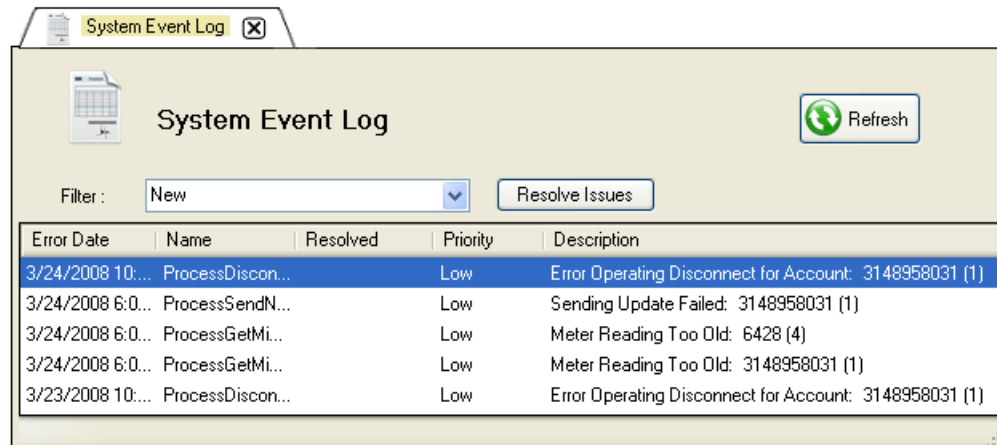
Billing Cycle:

Single Cycle Date Remaining: Any accounts with only one remaining billing cycle date on its upcoming schedule appear in this database. UtiliSales always requires an additional billing cycle into the future in order to accurately prorate the current month’s fixed charges (and related taxes). Accounts that have a single cycle date remaining must be addressed and additional billing cycles must be established before the account transitions into **No Cycle Date Remaining** status.

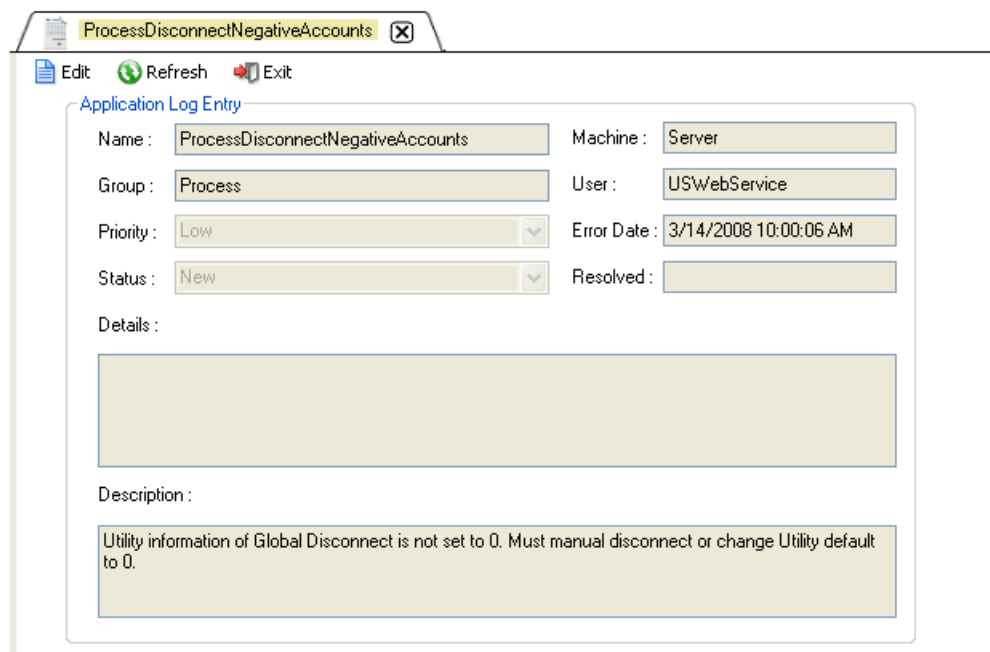
No Cycle Date Remaining: There are no more billing cycle dates awaiting the accounts on this list. This creates a temporary situation in which the customer account is not charged for their usage and taxes. Once a billing cycle date is input, UtiliSales automatically deducts past usage on a prorated basis. This will likely cause a sudden drop in the customer’s account balance, and may trigger a customer service call.

Event logs (New and Hold)

The event logs are system generated notifications and warnings of various levels of importance and priority. The event logs are where any issues UtiliSales found during scheduled tasks are reported. While not every entry in the event log requires immediate attention, it is important to review all listed issues on a disciplined, regular basis and process them accordingly.



Double-click on an individual event for more information.



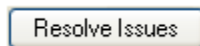
The **Priority** and **Status** default to a grey-ed out status, but can be edited by clicking the **Edit** button.



You can now modify the Status and Priority of the events, which will recategorize them into one of the two Event Log designations on the Status screen or, if resolved, will remove the event entirely.



The **Resolve Issue** button will change the status of all currently highlighted issues to “Resolved.”



ADMIN TAB



General Info and Tabs Containing Important Parameters

The General Info icon on the Admin Tab is the repository for most of the default settings within the application.

Within the **Content 1** tab, this is where the utility can establish the minimums and maximum payments possible to apply customer credit to an account.

Within the **Content 2** tab, this is where you control the SMaxAdj. The SMaxAdj is the maximum allowable amount for any Utility-initiated adjustment.

FmtCustNum: *Fixed Character Length Amount for Customer Number.* The fixed amount of characters in the customer number (represented by # symbols) that must be present for the system to recognize the customer number.

RANGES: If there are a range of digits in a customer number, these can be input using \$ signs as representative of character ranges (up to a 20 character max number).

For example, if customers have between seven and ten digits in their customer numbers, the **FmtCustNum** would read as follows:

```
##### $### $
1 2 3 4 5 6 7 8 9 10
```

Using this example, UtiliSales will not accept any customer number less than seven digits or greater than ten digits.

FmtLocNum: *Fixed Character Length Amount for Location Number.* The fixed amount of characters in the location number (represented by # symbols) that must be present for the system to recognize the location number.

RANGES: If there are a range of digits in a location number, these can be input using \$ signs as representative of character ranges (up to a 20 character max number).

For example, if customers have between seven and ten digits in their location numbers, the FmtLocNum would read as follows:

\$ # # # \$
1 2 3 4 5 6 7 8 9 10

Using this example, UtiliSales will not accept any location number less than seven digits or greater than ten digits.

DifltPercent: These are the global default percentage of newly-applied payments that go to pay off long term customer debt. For example, if the DifltPercent is set at .6, then sixty percent of all new purchase credit will go toward resolving any debt owed by the customer and the remaining forty percent will be actionable credit applied to the customer's purchasing power.

Within the **Content Three** tab, **DefaultDevice** is the code associated with disconnect state of the DSI or disconnect device.

Within the **Content Four** tab **LowMoneyAlarm** determines the number of days in advance of expiration of credit balance. For example, a LowMoneyAlarm value of 7 will send a message notifying the customer they have less than seven days of average daily power usage remaining unless they add credit to the account (credit that exceeds the LowMoneyAlarm window).

IHD Priority/DSI Priority: The priority of the IHD or DSI disconnect command with the hierarchy of TNS commands.

DSIConnectMethod: is the code associated with disconnect state of the DSI or disconnect device.

Utility Office Tab: is where you add or edit the locations where IHDs are configured (usually different remote sites associated with the Utility's locations, but could be customer locations).



Users

The Users screen is where you add and assign profiles and passwords for UtiliSales interface users.



Profiles

The profiles screen is where user profiles are created and permissions attached.



Workstations

All the computer names that have UtiliSales client installed. The Online column indicates how many active connections are logged in (1) or logged off (0).

The version column is a helpful way to keep track of which client computers have been upgraded.



Adjustment Categories

Where you can define categories of manual adjustments that may be applied to or subtracted from a customer account.



Configure IHD

Configure IHD

All IHDs must be configured, either (preferably) prior to distribution to the customer locations or after it is installed at the customer location. Configuration is done through the Configure IHD interface.

1. Log in.
2. Click the **Admin** tab.
3. Click **General Information**.
4. Click the **Utility Office** tab.
5. Enter the **Office** name.
6. Enter the serial number of meter you are using to configure IHD.
7. Click **Save**.
8. Click **Configure IHD** on left navigation panel.
9. Select correct office from the dropdown.
10. Enter the IHD serial number on each line.
11. Click **Configure**.
12. The IHD is now configured.



System Event Log

System Event Log

The event logs are system generated notifications and warnings of various levels of importance and priority. The event logs are where any issues UtiliSales found during scheduled tasks are reported. While not every entry in the event log requires immediate attention, it is important to review all listed issues on a disciplined, regular basis and process them accordingly.

BILLING FUNCTIONS

This chapter provides information for billing functionality incorporated into the UtiliSales interface. A customer’s rate can be determined by an assigned Location Class designation. A Location Class is built out of a combination of other adjustable criteria such as Rate Schedules and Taxes.

A customer’s rate is determined by an assigned Location Class designation. A Location Class is built out of a combination of other adjustable criteria such as Rate Schedules, Taxes and other Fixed Charges. Following is a suggested order for establishing various parts of the billing formula, building toward creating a Location Class. Once the Location Class is established, you can further define the time and service charge parameters which may affect the Location Class rate.

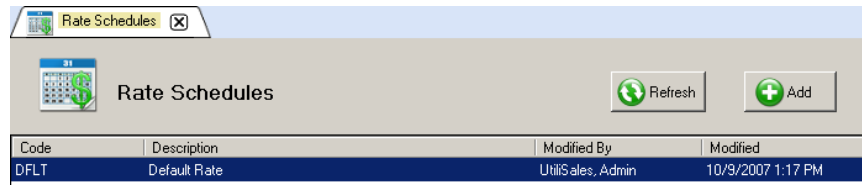
Rate Schedules

After logging in to UtiliSales, those operators with administrative permissions may create billing structures for a customer. Use the following procedure to build a rate schedule.

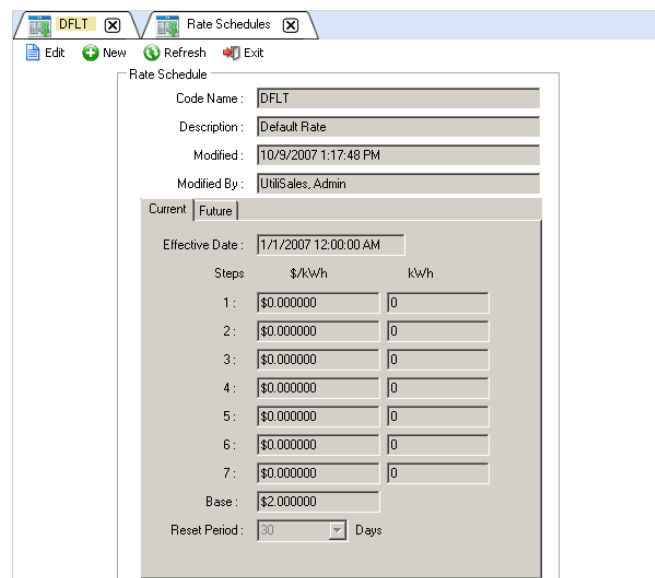
1. From the UtiliSales interface click the **Billing** tab along the left column.



2. Click the **Rate Schedules**  icon to view a list of Rate Schedules.



3. Click **Add** to create a new rate schedule or double-click an existing rate schedule to launch a dialog window with additional information.

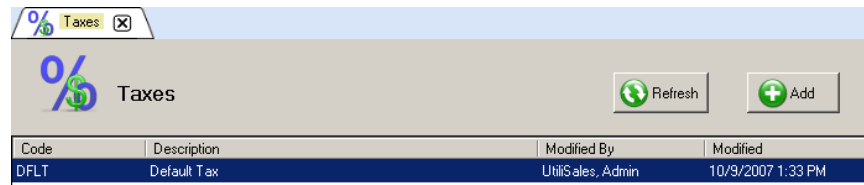


4. Click **New** to create another rate schedule, or click **Edit** to modify the existing rate schedule.

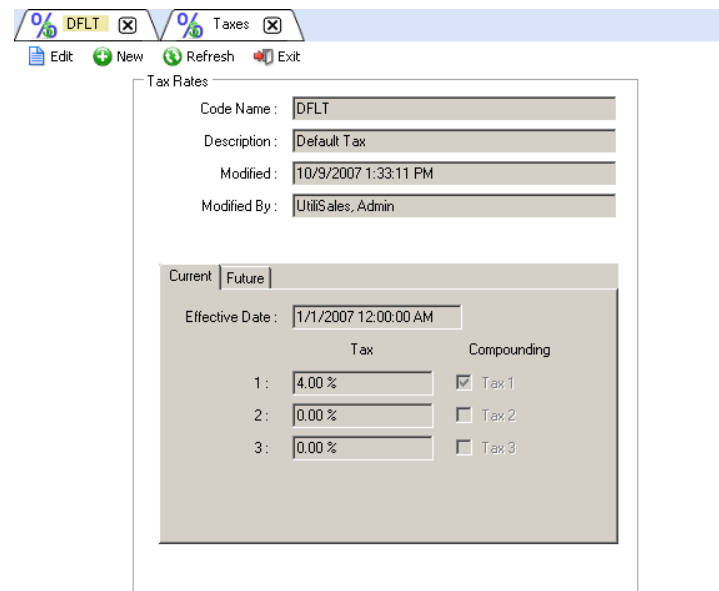
Taxes

State, county, and local taxes play an important part in determining a Location Rate, and must be defined for every location. Use the following procedure to add or edit a tax rate.

1. Click the **Taxes**  icon to view the Taxes dialog box.



2. Click **Add** to add a tax structure, or double-click a listed tax structure to open an input dialog box where you may edit or create compounding tax structures for various levels of government.




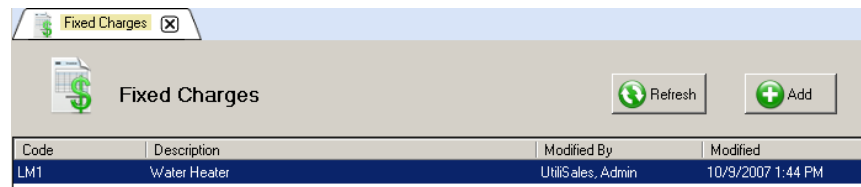
3. Click the **Close** button when editing is complete.

Fixed Charges

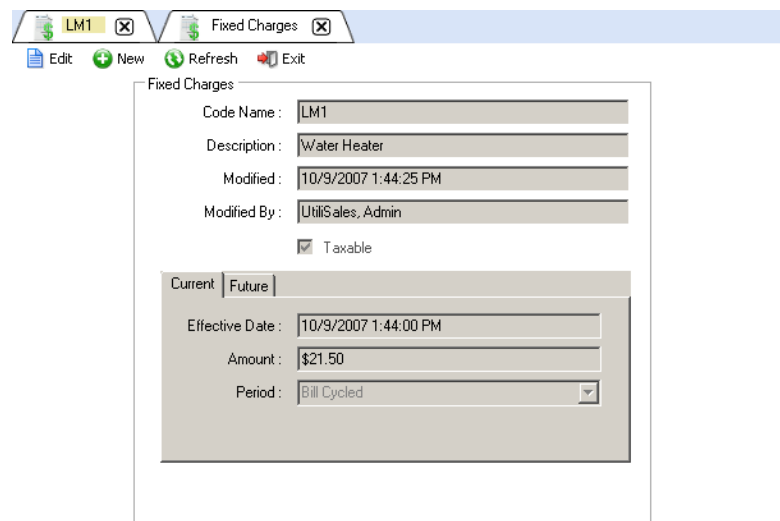
In addition to normal power usage fees, some customer locations are responsible for costs incurred by additional extraneous electrical devices they elected to install or maintain on their premises. These tend to be apartment complexes or commercial locations, but may apply to private residences as well.

Use the following procedure to add or edit a fixed charge item.

1. Click the **Fixed Charges**  icon to view the Fixed Charges dialog box.



2. Double click any of the fixed charges in the list to view additional information.




3. Click **New** to create a new fixed charge item, or click **Edit** to edit the details of an existing fixed charge item.
4. Click **Save** when done.

Fuel Cost Adjustment

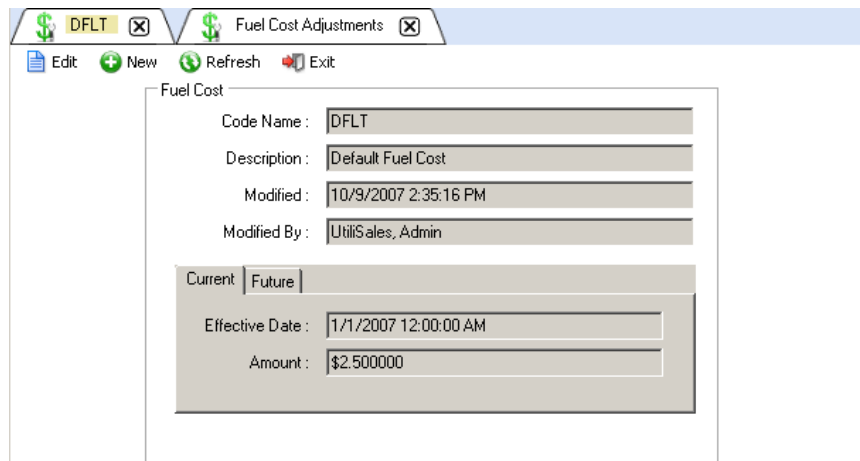
Some utility service providers have a pricing structure tied to the cost of the raw fuel materials required to generate power at the master plant. As the price of raw energy materials fluctuates, the **Fuel Cost Adjustment** parameter can too.

Use the following procedure to add or edit a Fuel Cost Adjustment.

1. Click on the **Fuel Cost Adjustment**  icon to view the Fuel Cost Adjustment dialog box.



2. Double-click an existing adjustment listed in the table to view additional information.




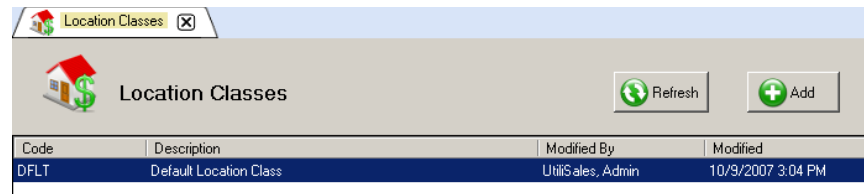
3. Click the **Edit** or **New** menu items to either change or create a new Fuel Cost Adjustment code and define the calendar date when the adjustment begins.
4. Click **Save** when done.

Location Classes

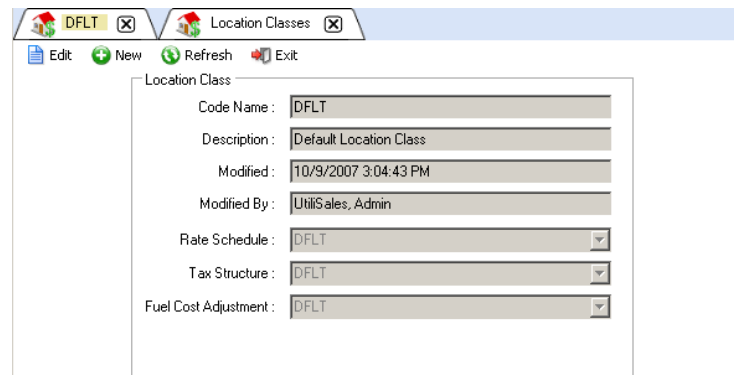
Using billing components mentioned earlier in this chapter, you can build a billing rate and define it as a Location Class that may apply to many customers in a geographic location or customers who share a specific usage profile.

Use the following procedure to add or edit a Location Class.

1. Click the **Location Classes**  icon to view the Location Classes dialog box listing all existing location classes.



2. Double-click any of the existing location class codes to view additional information.



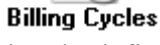
3. Click **New** or **Edit** to build or edit a location class using the Rate Schedule, Tax Structure, and Fuel Cost Adjustments which you created in previous billing menu operations.
4. Click **Save** when finished.

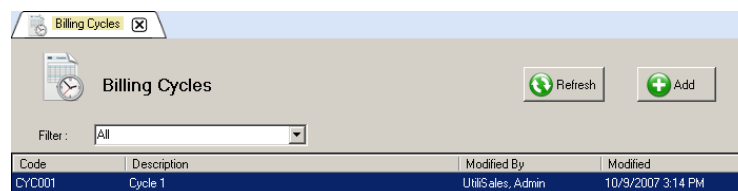
Billing Cycles

Customers who use UtiliSales as an ongoing service can define billing cycles for later application to a subset of customers or locations. Billing cycles are used to define the recurring date when a customer's account transitions from one billing cycle month to the next.

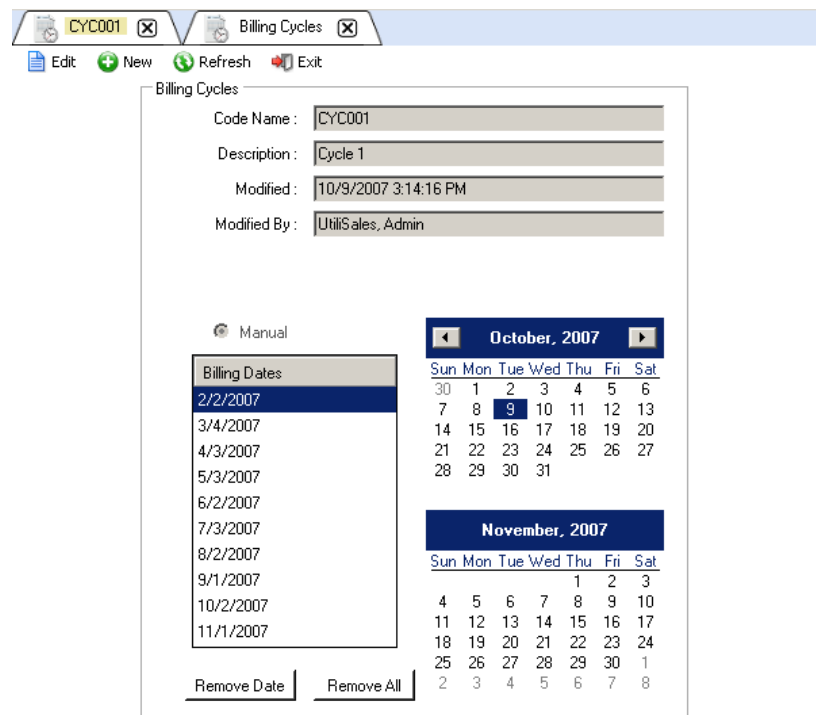
Use the following procedure to add or edit a billing cycle.



1. Click the **Billing Cycles**  icon to view the Billing Cycles dialog box listing all previously defined billing cycles.



2. Double-click an existing billing cycle to view additional information.



3. Click **Add** to add a new billing cycle or click **Edit** to modify an existing billing cycle. Calendars are provided for quick reference and date entry.



4. Give each billing cycle a **Code Name** and a clear **Description**.

5. Click anywhere in the two calendars to choose a billing date.
6. Click **Save**.

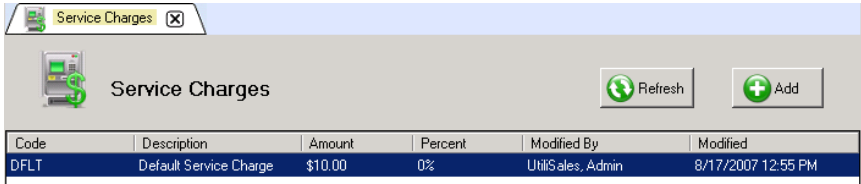
NOTE: Dates do not automatically purge after expiration. If users don't manually remove expired dates the old information will continue to accumulate.

Service Charges

Service charge fees are applied to vending stations, usually for the purpose of recovering the capital expense of the vending station itself. Sometimes service charge fees vary, based on the time of day when the transaction occurs (e.g. You may wish to wave the standard vending kiosk fee at the kiosk in the utility's office during normal business hours).

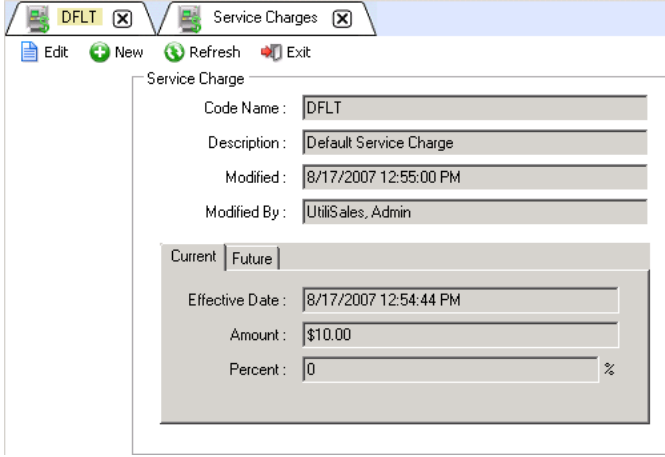
Use the following procedure to add or edit a service charge.

1. Click the **Service Charges**  icon to view the Service Charges dialog box displaying all existing service charges.



| Code | Description | Amount | Percent | Modified By | Modified |
|------|------------------------|---------|---------|-------------------|--------------------|
| DFLT | Default Service Charge | \$10.00 | 0% | UtiliSales, Admin | 8/17/2007 12:55 PM |

Double-click an existing service charge from the list to view additional information.



Service Charge

Code Name: DFLT

Description: Default Service Charge

Modified: 8/17/2007 12:55:00 PM

Modified By: UtiliSales, Admin

Current | Future

Effective Date: 8/17/2007 12:54:44 PM

Amount: \$10.00

Percent: 0 %

2. Click **Edit** to edit required fields, or click **New** to create a new service charge.
3. Click **Save** when finished.

APPENDIX

A

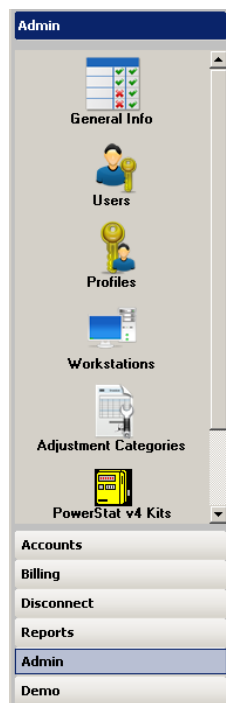
POWERSTAT IV (AND PREVIOUS)

This chapter provides information for bundling Version 4 meters with UtiliSales before the meters are installed.

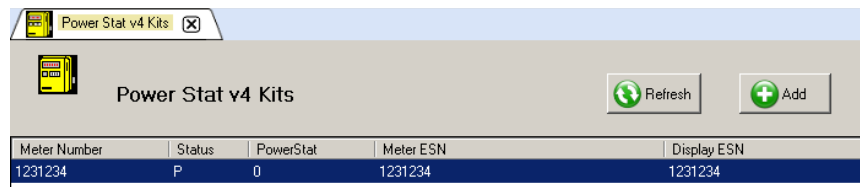
UtiliSales allows you to “pre-mate” a Version 4 meter and display to one another as a kit before they are assigned to a location. This makes it possible to keep kits of pre-mated equipment in inventory to be assigned to a location with a few mouse clicks. This makes it easier and less time consuming for field personnel to assign equipment to a location.


Adding a Version 4 Kit To create a new Version 4 (V4) kit:

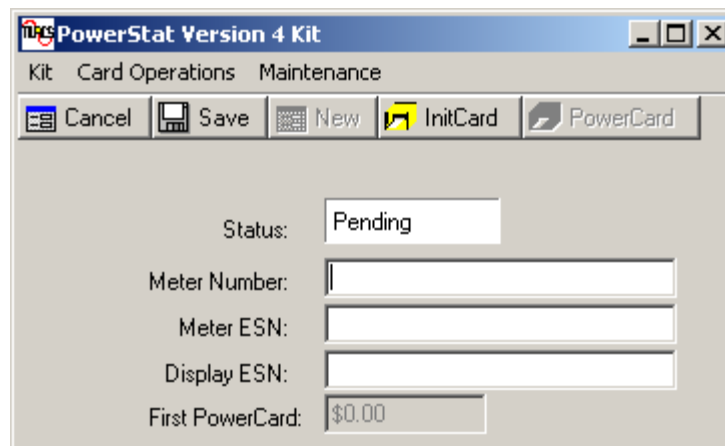
1. From the UtiliSales master interface click the **Admin** tab menu item.



- Click the **PowerStat V4 Kits** icon to view the PowerStat Kit interface.



- Click the **Refresh** button to update the list, or click the **Add**  button to view the PowerStat Version 4 Kit dialog box.



- Enter the Meter Number, Meter ESN, and Display ESN in the appropriate fields, and click the **Save** button. Notice that the kit's default status is Pending, and the First PowerCard amount is \$0.00.
- You must write an InitCard to make this kit active. To do this either click the **Card Operations** menu item and then click **Write InitCard** or just click the **InitCard** button at the top of the dialog box. When prompted, insert the card into the encoder. The card will be written to and ejected from the encoder.
- Now the kit is initialized but does not have a PowerCard associated with it. To write the first PowerCard either click **Card Operations** then click **Write PowerCard**, or just click the **PowerCard** button. You can accept the default PowerCard amount or enter your own amount.
- Once you have clicked **OK** you will be prompted to insert the mag-stripe card. The card will be ejected once it has been written to.
- TWACS advises you to keep the display, meter, InitCard, and PowerCard packaged together until they are deployed to avoid mixing up equipment and cards.

Reset Kit

Use the following procedure to reset the kit to Pending status before it has been deployed.

1. From the UtiliSales master interface click the **Admin** tab menu item, then click the **PowerStat V4 Kits** icon.
2. Click the **Maintenance** menu item, then click **Reset Kit** from the drop down menu. The kit status will reset to Pending and the First PowerCard field will be set to \$0.00.

The screenshot shows a software window titled "PowerStat Version 4 Kit". At the top, there is a menu bar with "Kit", "Card Operations", and "Maintenance". Below the menu bar is a toolbar with icons for "Edit", "Save", "New", "InitCard", and "PowerCard". The main area of the window contains several form fields:

- Status: A dropdown menu showing "Pending" and a numeric field showing "23".
- Meter Number: A text field containing "1231234".
- Meter ESN: A text field containing "1231234".
- Display ESN: A text field containing "1231234".
- First PowerCard: A text field containing "\$0.00".

View Kit Transactions

Use the following procedure to view the transactions that have been written on a particular kit.

1. Open the desired kit dialog, and click the **Maintenance** menu item.
2. Click **View Kit Transactions**.
3. A form lists the transactions for the kit.

Assigning Version 4 Kits to a Location

Use the following procedure to assign a V4 kit to a location.

1. Open the Location Information dialog for the customer to whom you want to assign the kit.
2. Click the **Maintenance** menu item, and click **Assign V4 Kit**. If there are a lot of available kits you can type the meter number in the Meter Number field to narrow your search.
3. Once you have found the desired meter, click on it and click the **Select** button to view a message box that says “Are you sure you want to assign Meter Number xxxx with PowerStat Number xxxx to this account?”
4. Click **Yes**. If the account was previously Pending you’ll notice that the account has been changed from Pending to Active status and that the money from the first card written has been entered as the first transaction.

Unassigning Version 4 Kits

Use the following procedure to unassign a V4 kit from a location.

1. Open the Location Information dialog box for the customer to whom you want to assign the kit.
2. Click the **Maintenance** menu item, and click **Unassign V4 Kit** to view a message asking if you want to unassign the kit from the location.
3. Click the **Yes** button. Notice that the status is now Pending and the equipment information in the Equipment tab is no longer blank.

Init Cards

1. You might have to write an InitCard to activate the account. However, if this is a V4 PowerStat account you will first have to enter a meter ESN and a Display ESN using the Equipment tab.

The screenshot shows a software interface for equipment management. At the top, there's a tab labeled 'Equipment/Notification'. Below it, the 'Equipment' section has radio buttons for 'V3 or Earlier', 'V4', and 'TWACS', with 'V4' selected. An 'Internal ID Number' field contains '0'. There are two input fields: 'Meter ESN' with a 'Change' button and a 'Verify' link, and 'DSI ESN' with a 'Verify' link. A 'Manual Switch Control' checkbox is present. Below this is the 'Notification Services' section, which is divided into three columns: 'Primary', 'Secondary', and 'On Disconnect'. Each column has a 'Method' dropdown menu and an 'Address' input field.

To do this, click **Edit** then either scan in the ESNs from the bar codes on the display and meter using the handheld scanner or enter them manually.

2. Click **Save**. You can now write an InitCard. The ESNs can also be entered manually or with the scanner on the InitCard screen.
3. If you are writing an InitCard for a location using a V4 PowerStat you must enter a valid meter ESN and display ESN. Each PowerStat IV system component has a unique 18 character identifier that is used to configure the system for a field deployment. This Electronic Serial Number (ESN) can be found on the product label of each component. The software will not allow you to enter an ESN that is not 18 characters long or that starts with anything other than CICV4M (for meters) or CICV4D (for displays).
 - 1 To write an InitCard pull up the customer's location information form by clicking **Location** on the main UtiliSales window
 - 2 Click **Select**.
 - 3 Enter the correct search information and click **OK**.
 - 4 Double-click a location from the list on the right.
 - 5 On the location information form select **Maintenance**, then **Write InitCard**.

When the card encoder screen appears, insert the mag-stripe card. The encoder will accept the card, write it, and eject it. The status text box on the **Summary** tab now says **Active**. You can now write a PowerCard.

InitCards are written after an account has been created or reset. InitCards must be written to give an account with a pending status an active status. When an InitCard is swiped in a PowerStat™ display important information like the PowerStat™ number and the system wildcard, are passed to the PowerStat™ equipment. The field equipment electronic serial numbers are also written to the card to allow the field equipment to validate the card.

The following process would follow the creation of a new account or the resetting of an existing account:

1. Open up the Location Information dialog for the customer.
2. Click the **Maintenance** menu item at the top of the dialog, and click **Write InitCard**.
3. Click either the **V3 or earlier** or **V4** radio box depending on what type of PowerStat™ unit is installed at the customer's residence. If it is a V4 PowerStat™ you can enter the electronic serial numbers (ESN) at this time if they have not yet been entered. If you do enter them make sure that they are 18 characters long and are entered precisely as printed on the equipment labels. Also make sure that you enter zeroes where you see a "0." They are easily mistaken for the letter "O." ESNs never contain the letter "O." If the ESNs entered incorrectly, the InitCard will be rejected by the field equipment and the system will not be initialized to receive PowerCards.
4. Click **Write InitCard**.
5. You will be prompted by the software to enter the mag-stripe card into the card encoder.
6. Once the card is inserted the card will be written to and ejected from the encoder.

NOTE If the card is not inserted when prompted by the software a message box will appear prompting you for more time. If you click **yes** you will be given more time, if you click **no** the InitCard transaction will proceed without a card write and a message box appears saying that you'll have to write the InitCard using the Duplicate Card function.

PowerCards

The PowerCard button is used in conjunction with the Account Purchase dialog box to vend PowerCards and it also displays several pieces of information about the account. PowerCards can be vended in Automatic or Manual mode.

When using the Automatic mode, any debt associated with the account is taken off automatically according to the type of debt associated with the account. These types of debt, Priority and Fixed, are discussed in the Debt section. The Account Purchase dialog box can also calculate what the actual amount written to the PowerCard will be after debt has been deducted without physically writing on the PowerCard. If the Manual mode is used, the operator can override the specified debt amounts listed in the Debt Amount and Priority Amount fields near the top


of the dialog box. If a customer has debt associated with their account the **Debt Amount** or **Priority Amount** areas on the Account Purchase dialog box will be highlighted in red. If the customer has a credit (money owed to them) the **Priority Amount** text will be highlighted in green.

| | |
|------------------|---------|
| Debt Amount: | \$0.00 |
| Priority Amount: | \$40.00 |

Vending A PowerCard In Automatic Mode

There are three ways to vend a PowerCard.

If the customer presents you with a previously used PowerCard for their current account use the following procedure.


1. Click the **Vend Card**  menu item at the top of the main UtiliSales dialog box.
2. Insert the card into the encoder when prompted.
3. Once the Account Purchase window appears enter the desired card amount in the Tendered Amount text box.
4. Click the **Make Purchase** button.
5. The card encoder will write the information to the card and eject the card.

If the customer does not have the card in their possession use the following procedure to write a PowerCard.

1. Search for the location by clicking the **Location** menu item at the top of the main UtiliSales interface.
2. Click the **Transaction** menu item at the top of the Location Information dialog.
3. Click **Purchase**.
4. Enter the desired card amount in the Tendered Amount field.
5. Click the **Make Purchase** button. The credit will be applied to the customer's existing card account.

Vending A PowerCard in Manual Mode

In Manual Mode if you have a customer with either fixed or priority debt, operators have the ability to bypass the debt when writing the PowerCard by using the manual feature. You can also allot an amount different than what is specified in the Priority Amount field or that would be required by the Debt Payoff Percentage specified on the Payment tab on the Location Information dialog box.

1. Click the **Purchase**  button to open an Account Purchase dialog box.
2. Click the **Manual** button at the bottom of the window.
3. Enter the desired amounts in the Tendered Amount, Service Charge Amount, Priority Amount, and Debt Amount fields. (To bypass the debt amounts only enter an amount in the Tendered Amount text box.)
4. Click the **Make Purchase** button.

Duplicate Cards

The Duplicate Card feature of UtiliSales enables you to write an exact copy of past PowerCards, InitCards, and ZeroCards. This feature is typically used when a customer loses a PowerCard before they have swiped it through their PowerStat™ display unit. Since the display has not yet seen the transaction number of the lost card you can go in to the Duplicate Card feature, duplicate the card, and the customer can take it home and swipe it through their PowerStat™. Utility personnel can write duplicate cards without concern of the customer's intentions. If the original card was swiped through the display, the duplicate card will be rejected by the field equipment as a used card. If the original card is swiped after the duplicate card, it will be rejected as a used card. An InitCard might be duplicated in the event there was an error during the process of writing an InitCard.

Use the following procedure to write a duplicate card.

1. Open the Location Information dialog box for the desired customer.
2. Click the **Maintenance** menu item, then click **Duplicate Card**. UtiliSales will query for all cards that can be duplicated and display them in the Duplicates dialog box.
3. Click the row of the card you want to duplicate, and click the **Select** button.
4. Insert the mag-stripe card when prompted by the software. The card reader will accept the card, write to it, and eject it.

ZeroCards

ZeroCards are used when a customer is about to move out of a location. By writing a ZeroCard you can set the amount of money left on the PowerStat™ display to a specified amount. For example, if a customer were one day away from moving out of their residence they might want to leave \$5.00 on their display while they cleaned the premises. If they currently had \$20.00 on their display, the utility would write a ZeroCard for \$5.00 and the customer would run it through their PowerStat™ display. The amount remaining on the PowerStat™ display would then be \$5.00.

Use the following procedure to create a ZeroCard.

1. Open Location Information dialog for the desired customer.

2. Click the **Maintenance** menu item, then **Write ZeroCard**.
3. Enter the residual amount (the amount to be left on the display).
4. Click the **Write ZeroCard** button.
5. Insert the mag-stripe card once prompted by the software.
6. The card will be written to and ejected. For the customer to receive credit for the difference after swiping the card, he or she must report the customer response number to the utility.

Process CRN Function

After a customer has swiped a ZeroCard through their PowerStat™ display the amount will be reduced to the residual amount that was written to the ZeroCard. There now remains the matter of the customer being owed the money that was taken off. All utilities have their own way of dealing with this situation, with some even not offering refunds on residual amounts. However, UtiliSales and the PowerStat™ IV allow the consumer to present the utility with the true amount remaining on the meter. The sixth menu on the Purchase Display Page of the PowerStat™ IV display is used to display encrypted information that the customer can relay to the utility. The information encrypted is displayed as a numeric string terminated by the # (pound) character. The Customer Response Number (CRN) is used to provide a refund, a meter reading, or elapsed usage information. The information contained in the CRN depends on the system state. The state we are concerned with for the purposes of this manual is that state after a ZeroCard has been swiped through the display unit. The information displayed in the Purchase Display Page at that time will show the refund amount. This will remain valid until another PowerCard is swiped through the display or an account reset is done.

The process for using the Process CRN function is as follows:

1. Open a **Reset** for the desired location.
2. Click the **Maintenance** menu item,
3. Click **Process CRN**.
4. When the Process CRN dialog appears, enter the encrypted information found on the Purchase Display Page of the customer's PowerStat™ display, and click the **OK** button.
5. If the encrypted message was entered correctly, a message box will appear giving the amount of the refund due the customer.
6. Record this amount. A refund or credit can be issued to the account for this amount.

Account Reset

Resetting an account changes the status of an account to “Pending” and enables you to change equipment and write a new InitCard to reflect that change.

Performing an account reset for a version 3 or earlier PowerStat™ differs from an account reset for a PowerStat™ IV.

Resetting a Version 3 or Earlier PowerStat™

There are two methods you can use to reset an account. One is to just set the account status to “Pending”. The other is to write an InitCard for a residual amount, and then write a PowerCard for that account. Use the following procedure to reset a Version 3 or earlier PowerStat™.

1. Open the Location Information dialog box for the appropriate customer.
2. Click the **Maintenance** menu item.
3. Click **Account Reset** to view a form with instructions to either click the **Reset** button to set the account status to Pending, or click the **Next** button to move on to the next step. Clicking the **Reset** button will produce a message box that says “The location below has been successfully reset”. Notice that the status on the Summary tab of the Reset now says “Pending”. Clicking the **Next** button will take you through the process of writing an InitCard and then a PowerCard for the reset account. This process is described the steps that follow.
4. Click the **Next** button to view a message box that asks you to enter a residual amount. This is the amount that you want to remain on the meter.
5. Enter the amount, and click the **Next** button to view a message box saying “An InitCard must now be written.”
6. Click the **Next** button to view a message box that states “A PowerCard must now be written”.
7. Click the **Next** button to be prompted by the software to insert the mag-stripe card. The card will be written to and ejected from the card encoder.
8. Click the **Finish** button to view the message “The location has been successfully reset”.

Resetting A Version 4 PowerStat™

There are 3 options to choose from when resetting a PowerStat™ IV. A user has the option to just reset the password on the meter, to reset the account, or to reset the usage displayed on the meter. When the user chooses the Password Reset Only option, the wildcard in UtiliSales and the meter are changed to the new wildcard, the transaction history on the transaction history page of the field equipment is cleared, and the transaction number in the UtiliSales database is set to one.

When Account Reset is chosen all of the account data in the meter is cleared out and the meter is set to its uninitialized state, however, the meter reading is not cleared. Account total usage is cleared. Choosing Account Reset will set the account to Pending in UtiliSales and requires that an InitCard be written.

Choosing Meter Usage Reset will set the meter usage on the meter to zero.

Use the following procedure to reset a Version 4 PowerStat™.

1. Open the **Reset** for that customer, click the **Maintenance** menu item, and select **Account Reset**.
2. The first window of the Account Reset wizard will appear (Figure 6.2) showing the options to select either **Password Reset Only**, **Account Reset**, or **Meter Usage Reset**.
3. To reset the password select the **Password Reset Only** radio button and then click the **Write Card** button. Insert the mag-stripe card into the card encoder when prompted by the software. The information is written to the card and the card is ejected from the encoder.
4. To reset the account click the **Account Reset** radio button and then click the **Write Card** button. Insert the mag-stripe card into the card encoder when prompted by the software. The information will be written to the card and the card will be ejected from the encoder.
5. To reset the meter usage click the **Meter Usage Reset** radio button and then click the **Write Card** button. Insert the mag-stripe card into the card encoder when prompted by the software. The information will be written to the card and the card will be ejected from the encoder.

NOTE When doing an equipment changeout where all the equipment will be removed from the residence, follow the procedure for resetting the account using the “Account Reset” radio button. Although a Reconfigure card is written during the process it can be disregarded since the equipment will no longer be used at the residence.

Meter and Display Changeouts

Meter and Display Changeouts are handled differently depending on which version of the PowerStat™ the customer has. The following sections explore the differences between the version 3 and earlier and PowerStat IV meter and display change outs.

PowerStat™ Version 3 and Earlier Meter and Display Changeouts

After opening the **Reset** for the customer and selecting the **Maintenance** menu item, click **Meter Changeout**. A message box will appear stating “This is a V3 or earlier PowerStat™ account. No action is required to Changeout the sleeve module.” Meters can be changed out with version 3 or earlier PowerStat™ units without any aid of the UtiliSales software. However display changeouts for version 3 or earlier PowerStat™ units require an account reset.

Use the following procedure to change out a PowerStat™ version 3 or earlier display.

1. Open the **Reset** for the customer and click the **Maintenance** menu item.
2. Click **Display Changeout** to view a message box that says “In order to replace the Display unit of a V3 PowerStat™ or earlier, an Account Reset must be performed.”
3. Click the **OK** button to view the Account Reset wizard form for a version 3 PowerStat™. From here follow the instructions for resetting a version 3 PowerStat™ in *Account Reset* on page 67. Once the account is pending the display can be changed.

PowerStat™ IV Display Changeouts

To change out a display with a PowerStat™ IV unit a reconfigure card must be written. This is done to inform the meter of its new display's electronic serial number.

Use the following procedure to change out a PowerStat™ IV display.

1. Open the **Reset** for the customer, and click the **Maintenance** menu item.
2. Click **Display Changeout** to view the V4 Display Changeout form
3. Enter the new display ESN, and click the **OK** button.
4. Insert the mag-stripe card into the card encoder when prompted by the software. The card will be written to and ejected by the encoder. Note that the account still has an **Active** status. Once the new display has been installed in the residence, swipe the reconfigure card you have just written through the display. The meter should now recognize the new display as its mate.

PowerStat™ IV Meter Changeouts

Use the following procedure to perform a Meter Changeout for a PowerStat™ IV in UtiliSales.

1. Open the **Location Information** dialog for the desired customer.
2. Click the **Maintenance** menu item.
3. Click **Meter Changeout** to view a message box that says “**In order to Changeout a Meter on a V4 Account, an Account Reset must be performed. Do you wish to continue?**”
4. Click the **Yes** button to view the Account Reset form.
5. From here you can either click the **Reset** button or the **Next** button. Clicking the **Reset** button sets the Location's status to **Pending**. From here you can edit the Meter ESN and write a new InitCard. Clicking the **Next** button will step you through the Account Reset Wizard. The rest of this procedure describes the steps followed when using the Account Reset Wizard.

- 1 Once the first form of the Account Reset Wizard appears enter the residual amount for the PowerCard that will be written at the end of the process.
- 2 Click the **Next** button to view a window that says “An InitCard must now be written”.
- 3 Enter a new Meter ESN, and click the **Next** button.
- 4 Insert a magstripe card into the card encoder when prompted by the software. The card will be written to and ejected. Label this card as an InitCard and set it aside.
- 5 The next window states that a PowerCard will now be written for the residual amount entered earlier in the process. Click the **Next** button.
- 6 Insert a magstripe card into the card encoder when prompted by the software. The card will be written to and ejected. Label this card as a PowerCard.
- 7 Click the **Finish** button.
- 8 With the new meter installed, swipe the Init Card through the existing display or the PowerStat IV System Support Unit (SSU).

NOTE If the display firmware version is 1.00 the InitCard will have to be swiped through a System Support Unit (SSU). You can verify the firmware version in your PowerStat™ IV display by viewing the Service Display on your PowerStat™ IV display.

To access the Service Display:

1. From the Basic Display Page on the PowerStat™ IV display hold the down arrow for 3 seconds to view the Purchase Display menu.
2. From this page hold both the up and down arrow keys for 5 seconds to view the Transaction Display menu.
3. From this page hold the up arrow for three seconds to view the **Service Display** menu.
4. Press the up arrow three times to get to the Display Firmware Display.

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