



Utility Billing: Data & Reporting

Robin Landers – Product Manager



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Utility Billing – Understanding Your Data

- Account Information
- Service Information

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Account Information

Customer Name and Address

Red Flag Information: Driver's License, SSN, Bank Draft Information

Customer Type, Paperless Billing, Special Needs

Deposit Information

Balance Due: Bill, Payment, Adjustment, Past Due Amounts

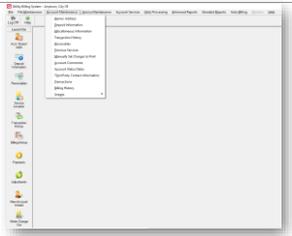
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Utility Billing – Understanding Your Data

Account Maintenance



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Service Information

Locations	Address, Plant, Cycle, Route, Folio, Read Sequence, Latitude, Longitude, Subdivision, Lot, Tract
Meters	Serial Numbers, RFID, Meter Type, Carryover Consumption, Install Dates, Size, Read Instructions, Meter Notes, Compound, Demand
Charge Codes	Assign charge associated with this service Ex: 2" Water Meter, Sewer, and DHEC Fee
Readings	Read Date, Reading, Consumption

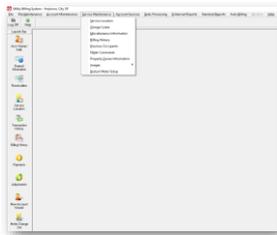
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Service Maintenance



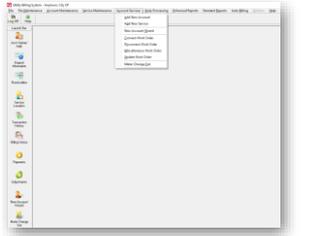
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Account Services



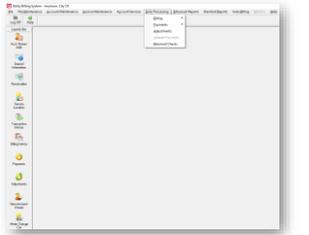
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Daily Processing



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Utility Billing Data Files

Accounts – A/R File

- Name
- Address
- Contact Information

Deposits - Deposit File

- Amount
- Status
- Applied/Refund Information

Meters – Meter Service

- Service Location
- Plant/Cycle/Route/Folio/Read Sequence
- Meter Serial Number
- Charge Codes

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Utility Billing Data Files

Summary Transactions – Trans File

- Charge and Payment Amounts
- Operator Initials
- Transaction Code
- Transaction Date
- Transaction Number

Detail Transactions – OBM Item File

- Charges per charge code and bill date
- Payments per charge code and bill date
- Consumption
- Reading

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Utility Billing - Reporting

- Enhanced Reports
- Standard Reports
- Custom Reports and Data Exports

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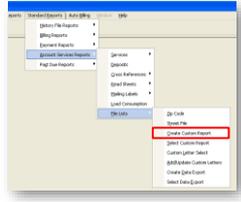
Enhanced Reports

- Predefined system reports
- Print in color, if you have a color printer
- Export to file
- Customized Select and Sort Options
- Report history
- Multiple saved versions

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Create a Custom Report

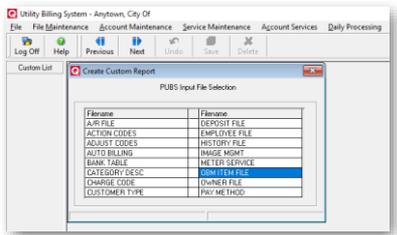


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Create a Custom Report

Select the main data file

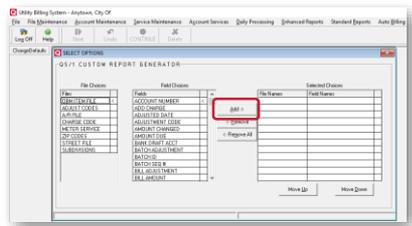


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Create a Custom Report

Determine fields for select criteria

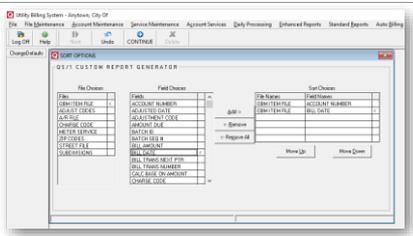


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Create a Custom Report

Determine fields for sorting and totaling



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Create a Custom Report

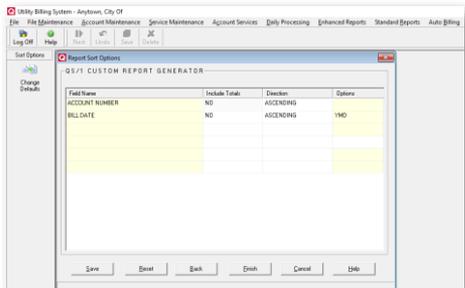
Specify Totals

- **YES** – Total on field
- **NO** – Do not total on field
- **NPG** – Total and page break

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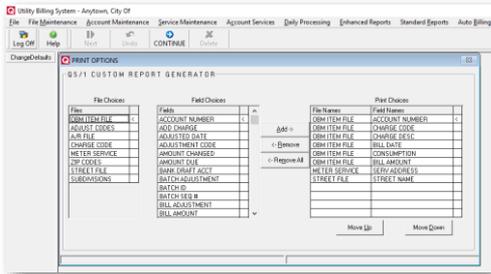
Create a Custom Report

Specify data from main and related files to be printed

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Create a Custom Report

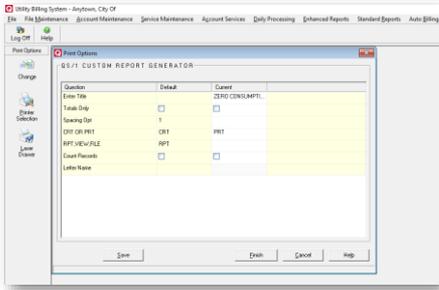
Print Options

- Enter Title
- Totals Only
- Spacing Options
- Viewing Options
- Ability to save

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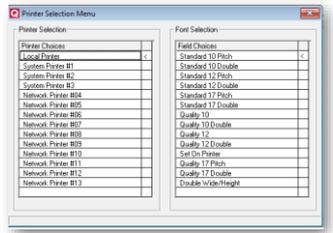
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Create a Custom Report

Printer Selection



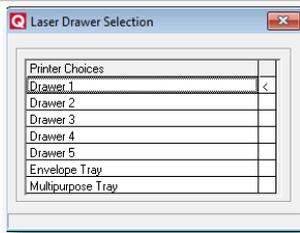
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Create a Custom Report

Drawer Selection



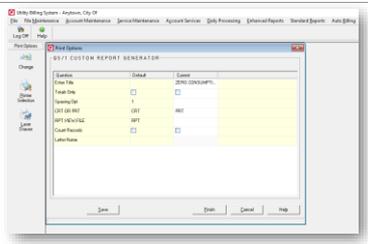
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Create a Custom Report

Print Options



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Create a Custom Report

Date: 02/25/20

ZERO CONSUMPTION Page 1

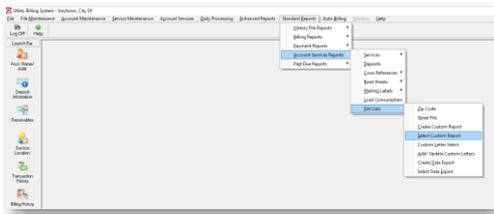
ACCOUNT NUMBER	CHARGE CODE	CHARGE DESC	CHARGE DATE	CONSUMPTION	BILL AMOUNT	REV ADDRESS	STREET NAME
22759-001	WATER		07/27/19	0000000000	15.00	123	PUBLIC LANE

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Run a Saved Custom Report

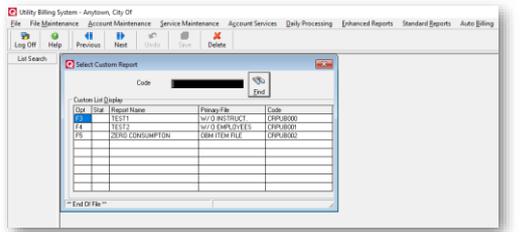


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Run a Saved Custom Report

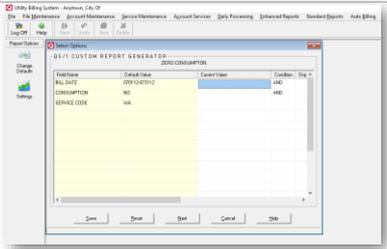


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Run a Saved Custom Report



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Run a Saved Custom Report

Update Current Value field for any Select, Sort, or Print Option changes

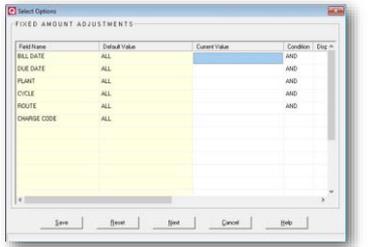
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Fixed Amount Adjustments

Select Options



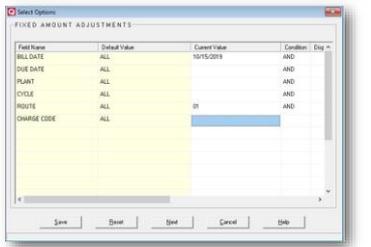
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Fixed Amount Adjustments

Select Options



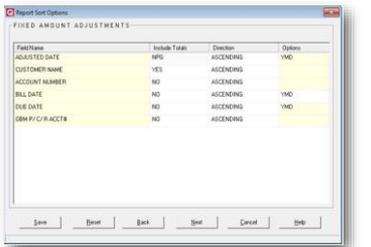
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Fixed Amount Adjustments

Sort Options



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Fixed Amount Adjustments

Post Options

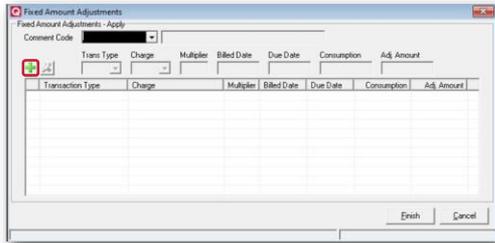
- Adjust Type
 - Apply
 - Reverse
- Subject to Penalty



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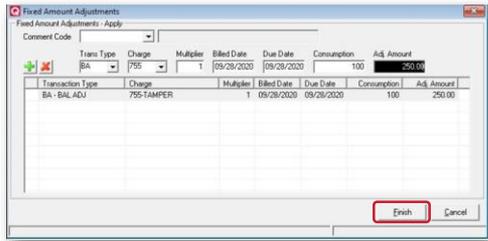
Fixed Amount Adjustments – Apply



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Fixed Amount Adjustments – Apply



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Questions?



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