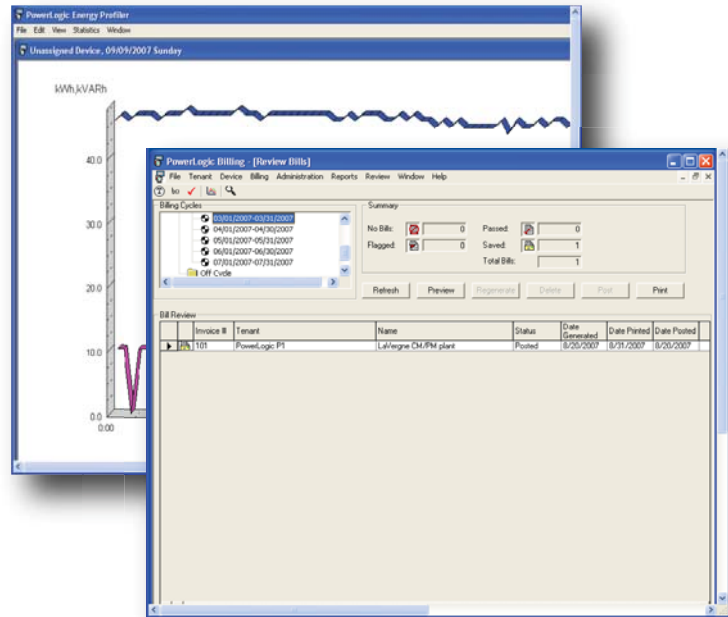


Instruction Bulletin

PowerLogic[®] Billing User's Guide



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Section 1—PowerLogic Billing

Billing Overview

PowerLogic Billing software provides owners and managers of multi-unit facilities the ability to generate invoices for energy used by tenants. A power meter is assigned to each unit to record energy-use data. This energy-use data is collected by the meter-reading software and is transferred into the billing system. Invoices are then generated at scheduled times.

Along with processing the meter data, the billing system stores location and mailing information for the tenant and establishes the tenant's account. The tenant's account includes information such as which billing cycle to apply, the devices and types of services assigned to the account, as well as what rates to apply.

The main functions of the billing software are:

- Establishing tenants and accounts
 - Entering tenant information
 - Assigning billing cycles
 - Assigning devices
 - Assigning rates
- Billing
 - Generating bills
 - Reviewing bills
 - Posting bills
 - Printing bills
- Reporting
- Viewing load data

In addition to the main billing functions, a utility called the RateWizard® is used to change existing rates or to create new ones when necessary.

The software comes with sample rates and sample billing cycles already in place that will, for many users, be appropriate for use as is or with only slight modifications.

Establishing Tenants and Accounts

Establishing tenants and accounts is accomplished in the Tenant portion of the software. The **Tenant** screen contains the name and billing address for the tenant. It also contains dates for when the tenant's account is added to the system, and when it is closed. For more information on tenants, see Managing Tenant Records on page 11.

An account is automatically set up for a tenant when the tenant's name and address information is entered into the system. The tenant's billing cycle, service types, and device assignments are entered and displayed on the **Account** screen. For more information on accounts, see Setting Up the Tenant's Account on page 15.

Billing

Bills are generated on a cycle. If a tenant leaves sometime other than at the end of a cycle, bills can be generated off-cycle. Bills are created using the **Generate Bills** screen. For more information on billing, see Billing on page 25.

During the billing process, an activity log is displayed showing the progression of the process and noting successes or any exceptions that

may occur. Once the process is complete, the bills can be reviewed in the **Review Bills** screen. For more information, see *Reviewing Bills* on page 25.

Generated bills are reviewed, posted, printed, or re-generated from the **Review Bills** screen. Posting refers to the process of verifying and committing a bill to the system. Valid bills are typically posted before they are printed and sent to the tenant.

Any bills that were not generated will be flagged with an indicator representing the reason. Problems can be fixed and the bills re-generated.

Reporting

The billing system provides two reports:

- **Event Log**—a running log of all system transactions.
- **Revenue Summary**—a report showing the dollar amount of posted bills. Along with the amount posted, the report lists the invoice number, billing end date, and the posting date.

For more information on the Event Log, see *Viewing the Event Log* on page 29. For more information on the Revenue Summary, see *Generating the Revenue Summary* on page 29.

Viewing Load Data

The PowerLogic Energy Profiler® provides the ability to view load profile data for a selected meter in a graphical trend format. The graph can be set up to display data covering a 24-hour period, a week, or a month. The data can also be displayed in numeric format and can be exported to a .csv file for use in other software. For more information on the graphing tool, see *Using PowerLogic's Energy Profiler®* on page 31.

Section 2—Navigation

Navigating the Software

Menu Bar

Functions in the billing system are accessed using both the main menu bar and the tool bar.

Menu bar selections are listed and defined below.

File

- Print Setup—allows you to set up your printer for printing reports.
- Exit—closes the billing software.

Tenant

- Tenant Screen—displays two tabs: **Tenant** and **Account**. Tenant is where you enter tenant contact information, and Account is used for assigning meters, rates, and billing cycles.
- Search—used to search for a specific tenant.

Device

- Virtual Device—provides the ability to set up shared and combined devices.

Billing

- Generate Bills—used to generate bills.
- Review Bills—allows you to review the status of bills. You can also re-generate, print, and post from this selection.
- Cycles—allows the setup of billing cycles.
- RateWizard—used to create, edit, or modify rates.

Administration

- Users—used to set up users for the system.
- Property Manager—used to store the “Remit To” address.

Review—This selection is available only after selecting **Review Bills** from the menu bar.

- View Events—used to view the status of a selected bill.
- Preview Selected Bill—allows you to select and preview a bill.
- View Load Data—opens the Energy Profiler graphing module to display interval load data for all devices assigned to a Tenant.
- Regenerate Selected Bill(s)—allows you to select and re-generate bills.
- Print Selected Bill(s)—used to select and print bills.
- Print All Bills—used to print valid bills from a selected cycle.
- Post Selected Bill(s)—initiated when bills are valid and ready to print. Commits data to the system's history.
- Delete Selected Bill—used to select and delete bills.
- Cancel/Re-bill Selected Bill—permits you to re-bill a selected bill.

Reports






- Event Log—provides access to the event log. The log can show either all entries or a filtered subset of entries.
- Load Data—presents profile load data for a meter in a graphical trend format.
- Revenue Summary—used to view or print a report of selected or all posted bills.

Window

- Cascade—displays all open program windows in cascading style.
- Tile—creates a separate viewing window for each open program window and displays all at the same time.
- Arrange Icons—arranges desktop icons.
- Other selections shown depend on which portions of the system are open.

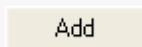
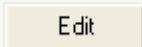

Tool Bar

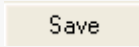
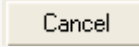
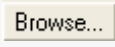
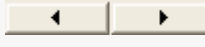
The tool bar icons serve as short-cuts to program functions as shown in the table below.

Icon	Function
	Opens the Tenant screen.
	Opens the Generate Bills screen.
	Opens the Review Bills screen.
	Opens the View Load Data selection screen.
	Opens the Tenant Search screen.

Navigating Program Screens

The table below describes the common screen navigation buttons.

Icon	Function
	Click to add a new record.
	Click to edit an existing record.
	Click to delete an existing record.

Icon	Function
	Click to save a new record or modifications to an existing record.
	Cancel any additions or changes. Changes are not saved.
	Opens a listing containing all records in the file.
	Move stepwise backwards or forwards in a file.

Depending on which part of the billing program is open, other buttons may be available. Their function is explained in context or is generally self-explanatory.

Section 3—Administration

Administrative Functions

Administrative functions are those functions that are usually only performed once, and after that only on an as-needed basis. Those functions include the following:

- Setting up users.
- Setting up the property manager.
- Setting up rates.
- Setting up cycles.

Logging In

The system administrator typically sets up other authorized users. Instructions for the first login are provided in the *PowerLogic Tenant Metering—Commercial Edition Software Installation Guide*.

Adding Users

Users can be added, modified, or deleted using the **User Administrator** window. A list of existing user names is displayed in alphabetical order.

To create a user:

1. Select **Administration > Users** from the main menu bar. The **User Administrator** window is displayed.
2. Click **Add**. A blank **User Properties** window is displayed. The **UID** (user identification) number is automatically generated by the system and cannot be changed.
3. Enter the **User Name**, **Password** (retype the **password** to verify), **Full Name** and **Description**. The **User Name** and **Full Name** are displayed in the **User section** of the **User Administrator** window, so choose names that will uniquely identify the user.
4. To prohibit users from changing their password, put a check mark by **User Cannot Change Password**. No check mark is the default.
5. Removing the check mark by **Accounts Enabled** prevents the user from logging into the system. Having a check mark is the default.
6. Once the information is completed in the fields, click **OK**.
7. Click **Close**.

Modifying Users

To modify a user's information:

1. Select **Administration > Users** from the main menu bar. The **User Administrator** window is displayed.
2. In the table of users, select the row that contains the user's name you wish to edit. The row will turn blue.
3. Click the **Edit** button. The **User Properties** window will open.
4. Make the desired changes, then click **OK**.
5. Click **Close**.

Deleting Users

To delete users:

1. Select **Administration > Users** from the main menu bar. The **User Administrator** window is displayed.
2. In the table of users, select the row that contains the user's name you wish to delete. The row will turn blue.
3. Click the **Delete** button. The **Delete User** dialog box opens.

4. To delete the user, click **Yes**.
5. Click **Close** to close the **User Administration** window.

Setting up the Property Manager

The property manager is the person to whom bill payments are sent. This name and address are printed on bills in the “Remit To:” area. Entering manager information is required for bills to show a **Remit To** address.

Adding Manager Information

To enter manager information:

1. Select **Administration > Property Manager** from the main menu bar. The **Property Manager - Billing Remittance Information** window is displayed.
2. Enter the manager's name, **Last Name** first, then the **First Name**.
3. Enter the manager's **Billing Address, City, State,** and **Zip** code.
4. Enter the manager's **Phone Number, Fax Number,** and **E-mail** address.
5. Click **Save**.
6. Click **Close**.

Modifying Manager Information

To modify manager information:

1. Select **Administration > Property Manager** from the main menu bar. The **Property Manager - Billing Remittance Information** screen is displayed.
2. Change any of the fields to the desired value.
3. Click **Save**.
4. Click **Close**.

Setting up Rates

See Setting Up Rates on page 21 for more information on this topic.

Setting up Cycles

See Setting Up Billing Cycles on page 19 for more information on this topic.

Uploading Your Company Logo

The software includes a utility program called “Bill Logo Updater” that allows you to upload your company's logo into the billing system. When bills are printed, your logo is displayed on the bills.

The logo must meet the following specifications:

- The logo will be placed into an area 7-inches wide and 1-inch tall.
- The logo must be in a bitmap (.bmp) file format.
- The maximum file size must be 1 MB or smaller.

NOTE: Bill Logo Updater can be executed only by someone with a Windows Administrator security level.

To execute Bill Logo Updater:

1. **Select Start > All Programs > PowerLogic Tenant Metering - Commercial Edition > Billing Logo Updater.** The **Bill Logo Updater** window opens.
2. Click **Load Image**.
3. Locate your image using the file browser. Click **Open**.
4. The image will display within the outlined rectangle on the Bill Logo Updater window.
5. Click **Close**. The image is uploaded to the system and will display on the bills when they are generated.

Setting up the Printer

Bills and reports generated by the billing software are designed to print on 8.5" x 11" paper in portrait format. Bills print **only** to your system's default printer or, optionally, to PDF. Should you wish, you can configure a different printer for reports.

To configure your printer for reports:

1. From the menu bar, select **File > Print Setup**.
2. Select the printer to be used for reports.
3. Set your printer to print on 8.5" x 11" paper in portrait format.
4. Close the printer dialog.

Section 4—Tenants

Establishing Tenants

A tenant is defined as the person or entity that owns an account. The account describes what device is assigned to the tenant as well as the type of service, rates to apply, and when the tenant is billed. When a tenant's name is entered into the system, an account is automatically created for that tenant. After adding the tenant, see *Setting Up the Tenant's Account* on page 15.


Information required to describe the tenant includes a name, billing address, phone and fax numbers, and, optionally, an e-mail address. The address information is where the bill will be mailed and is also printed on the bill.

Managing Tenant Records

Tenant records are created, modified, and deleted on the **Tenant Screen**. For help locating the Tenant Screen, see *Navigating the Software* on page 3.

Adding Tenants

To add a new tenant:

1. From the icon bar, select , or from the menu bar, select **Tenant > Tenant Screen**.
2. When the tenant screen appears, click **Add**. All data fields are cleared.
3. Enter the **Tenant ID** and **Name** at the top of the screen. The **Tenant ID** is displayed in tenant listings and can be used for searching. It is also printed on the bill. It must be unique. The **Name** field is the account's name. It typically describes the unit or meter location.
4. The **Open Date** defaults to today's date. This date indicates when the tenant is entered into the system. If you need to change it, enter the date in MM/DD/YYYY format, or use the drop-down calendar to select.
5. Enter the tenant's name, address, telephone numbers, and other contact information. Address information is printed on the bill and is necessary for mailing.
6. Once you have entered all the tenant information, complete the transaction by clicking **Save**.

If at some point during the creation of the tenant you decide to cancel the transaction, click **Cancel**, then click **Yes** in the dialog box to cancel the transaction.

Modifying Tenant Information

To modify a tenant's information:

1. Select the tenant to be changed using one of the following methods:
 - a. On the **Tenant** screen, use the **Browse** buttons to navigate to the correct tenant.
 - b. From the menu bar, select **Tenant > Search**. The **Tenant Search** screen is displayed.

Enter information in one or more of the fields provided, and then click **Search**. Any tenant records that match the fields you searched on is displayed in a table at the top of the screen.

Click **Close** to exit the **Tenant Search** screen.

Select the correct tenant from the table by moving the cursor to the left-most column and clicking on the row with the tenant's name. The row is highlighted. Double-click the row arrow and the **Tenant Screen** opens.

2. After the correct tenant information is displayed on the screen, click **Edit**.
3. Change the fields as needed, and then click **Save** to update the changes.

If at some point during the modification of the tenant you decide to cancel the transaction, click **Cancel**, then click **Yes** in the dialog box to cancel the transaction.

Closing a Tenant

When a tenant leaves, the tenant's account must be closed in order to stop logging charges to the account and to generate a final bill.

To close a tenant and the associated account:

1. Navigate to the appropriate tenant.
2. Locate the **Close Date** field on the **Tenant Screen**. Click **Close Tenant**. The **Close Tenant** window opens.
3. Select the appropriate date from the calendar.

A tenant's final bill cannot be generated until one day after the **Close Date**. If the **Close Date** entered was yesterday or before, the **Generate Final Bill** option is available. If you want to generate the final bill for this tenant today, put a check mark by the **Generate Final Bill** option. Click **OK**.

A dialog box opens and explains that this action permanently closes the tenant's account. It also tells you the date the final bill will be available to generate.

To continue closing the account, click **Yes**. The dialog box closes, and the **Close Date** field on the **Tenant** screen now displays the date selected.

NOTE: If the **Close Date** falls into a billing period that has been generated, the **Close Date** will not be accepted by the system. For example, if the tenant's bill was generated up to April 30, the earliest close date is May 1.

Closing Example

The following example may help to clarify closing (and potential re-opening) an account.

- The tenant's open date is July 1, and the tenant is billed on an "end-of-month" cycle.
- July and August bills were generated for this cycle.
- The current billing period is September 1 – September 30.
- The tenant plans to move out on October 15. You can go ahead and pre-set the close date for October 15.
- The bills for September 1 – September 30 are generated. Since the tenant is not leaving until October 15, the tenant has a bill generated in this period.

The next billing cycle is October 1 – October 31. Before generating bills for this cycle, you could potentially complete one of the following tasks:

- A. Remove the tenant's **Close Date**.

NOTE: This is the last chance that the tenant's closed account can be re-opened.

- B. If today's date is October 16 or later, you can generate an off-cycle bill from the bill generation window.

When you generate the October 1 – October 31 bills, the following situations may occur:

- If **neither** task A nor B above is performed, the tenant's final bill is generated and shown in the In Process Off-Cycle folder in the **Bill Review** window.
- If task A is performed (re-opening the tenant), the tenant's regular bill (October 1 - October 31) is generated and shown in the in Process billing period folder in the **Bill Review** window.
- If task B is performed (generate off-cycle bills), the tenant's final bill is not processed again.

Re-opening a Closed Tenant

A closed tenant may be re-opened, but only at a particular time during the billing cycle. A tenant's **Close Date** cannot be removed after the final bill has been generated. See the Closing Example on page 12 for detailed information.

To re-open a closed tenant:

1. Navigate to the appropriate tenant.
2. Click the **Close Tenant** button next to the **Close Date** field. The **Close Tenant** screen appears.
3. Un-check the check box by **Select tenant close date** on the **Close Tenant** screen.
4. A dialog box opens and asks if you want to remove the tenant's close date. Click **Yes** to remove the date or **No** to leave the tenant closed.

Section 5—Accounts

Setting Up the Tenant's Account

The tenant's account is the means for assigning and managing services at the site rented or leased by the tenant. These services may include electric, gas, water, air, and steam.

Adding Account Information

An account is automatically created for a tenant when the tenant is added to the system. After entering a new tenant, or by selecting an existing tenant, account information is viewed by selecting the **Account** tab located behind the **Tenant** tab on the **Tenant** screen.

The following items are set up and managed on the **Account** screen:

- Billing cycle.
- Service types.
- Rates.
- Devices.

Assigning the Billing Cycle

A billing cycle is the schedule on which a tenant is invoiced. Meter data are compiled for the set period (week, month, bi-weekly, and so on), rates are applied, and a bill is generated. For more information on billing cycles, see *Setting Up Billing Cycles* on page 19.

To assign the tenant's billing cycle:

1. On the **Account** screen, click **Change Cycle**. The **Select Billing Cycle** window opens with the cycle choices that are available.
2. Click **Add**, then click once to highlight the appropriate cycle.
3. Enter the effective start date for the cycle. The default is the current date and should not be earlier than the tenant's Open Date.
4. Click **Save** to add the cycle to the tenant's account.

Assigning Service Types, Rates, and Devices

Service types are set up in the "Service Type Detail" grouping of the **Account** screen. The buttons at the bottom of the screen are used to control assigning service types.

More than one service may be assigned to a tenant. The services are visible on the **Account** screen after they have been added. Once a service type has been assigned to an account, you must select a rate and at least one device before saving. You can assign more than one device to a service. Devices will be aggregated for use in calculating the bills.

To add a service:

1. Click **Add**. The "Service Type Detail" portion of the screen becomes active.
2. Select the service type from the drop-down list provided.
3. Select the rate to apply from the drop-down list provided.
4. Click **Add Device** and select the appropriate device from the Add Device window. Only devices that match the selected service type will be displayed. Close the **Add Device** window.
5. Click **Save** to add the service to the account.
6. Repeat this process for all services added.

Modifying Account Information

To modify account information:

1. Locate the tenant's record.
2. Click the **Account** tab.
3. Modify the fields as required. If changing the billing cycle, be sure to click **Save** on the **Select Billing Cycle** window. If changing a service, click **Save** at the bottom of the screen.

If at some point during the entering or changing of account information you decide to cancel the transaction, click **Cancel**, then click **Yes** in the dialog box to discard your changes.

Section 6—Virtual Devices

Setting Up Virtual Devices

Setting up a virtual device allows you to sub-divide energy use from a single meter or combine multiple meters. Virtual devices are used to aggregate percentages of one or more “real” devices. This arrangement permits you to spread costs from one meter over multiple tenants or sum multiple meters into a single meter. Virtual devices are assigned to tenants in the same way as real devices. Virtual devices must be added to the system before they can be assigned to a tenant.

Adding a Virtual Device

To set up a virtual device:

1. Select **Device > Virtual Device** from the main menu bar. The **Virtual Device** screen is displayed.
2. Click **Add**. Note that the **Name** prefix is automatically inserted with VIRT_ and that the **Type** is automatically inserted as VIRTUAL.
3. Enter a descriptive **Name** and **Display Name** for the device. The **Display Name** is shown on the bill in the list of devices.
4. Select the type of **Commodity** being measured from the drop-down menu.
5. In the Device List grouping, click **Add**. The **Add Device** window opens to display the meters in the system. You can filter the device list to show only those devices that are available or to show all devices.
6. Select a meter or multiple meters and enter the percentage of each meter that will be assigned to this virtual device.
7. Click **OK**. The **Add Device** window closes.
8. Click **Save** to add the virtual device.

NOTE: When the virtual device is assigned to a tenant, the tenant is only charged for the percentage assigned to the device.

Modifying a Virtual Device

To modify a virtual device:

1. Select **Device > Virtual Device** from the main menu bar.
2. Click **Browse** to display a list of virtual devices from which to select. After selecting the device, click **Edit**.
3. To change the percentage amount allocated for a meter, do the following:
 - a. Select the device, then click **Delete** to remove it from the list.
 - b. Click **Add** to display the device selection dialog box.
 - c. Re-select the device and specify the desired percentage.
 - d. Click **OK**. The **Add Device** window closes.
4. Click **Save** to complete the changes.

Deleting a Virtual Device

You cannot delete a virtual devices as long as it is assigned to a tenant or another virtual device. Remove the virtual device from tenant's assigned devices before deleting.

To delete a virtual device:

1. Select **Device > Virtual Device** from the main menu bar.
2. Click **Browse** to display a list of virtual devices to select from. Once you have selected the device, make sure it is the correct one. There is no verifying message for the delete.
3. Click **Delete** to remove the device.

Section 7—Billing Cycles

Setting Up Billing Cycles

Bills are typically generated once a month, either at the end of the month or on a certain day of the month. This process is referred to as the billing cycle.

Sample billing cycles are included with the software, and these may meet your needs without modification. However, since billing cycles can vary, the software provides flexibility in helping you set up cycles for your particular situation.

You can create completely new cycles, or you can modify any of the samples provided.

Create a Cycle

To create a new cycle:

1. From the main menu bar, select **Billing > Cycles**. The **Cycles** screen opens. To view a list of existing cycles, click **Browse** to open the **Billing Cycles** window.
2. To create a new cycle, select **Add** on the **Cycles** screen. The **Name** and **Description** fields clear.
3. Enter the **Name** and **Description** of the cycle being created.
4. In the "Period Type" grouping, select the kind of cycle by clicking in the appropriate radio button next to the options. If the option based on the "Nth" day is chosen, enter the numeric value for the day you have chosen in the **Where N is:** field. For example, if you want to bill on the 10th of every month, enter 10 in the **Where N is:** field.
5. In the "Due Dates" grouping, enter the number of days by which to extend the due date on the bill. If the bill is to have a due date of 20 days from the date that the bill is issued, then enter 20 in the **Days Past Close Date** field.
6. If the 20 days should only include working days, then click a check next to **Skip Sundays**.
7. Click **Save** to save the new cycle.
8. To automatically generate billing periods, click the **Generate Periods** button to the right of the period type. The **Generate Billing Period** screen is displayed.
9. Enter the start and end dates for the cycle. Click **Generate**.

If the Period Type is a user-defined type, then you can define only a **single** billing period at a time using the **Generate Periods** dialog box.

If the Period Type is **not** a user-defined type, the generate periods process will generate multiple billing periods between the date range specified using the cycle details.

10. Click **Save**.

After saving, you may view the cycle periods and dates by clicking the **Billing Periods** tab. You can change the **Start Date**, **End Date**, or **Due Date** directly in any of the table cells. You can edit the **Status Field** only in a forward direction. For example, if the previous status of the cycle is "New," the status can be changed to "In Process." However, you can't change "In Process" to "New." You can sort by any column in the table by clicking the column heading.

Modifying Billing Cycles

Any modification of billing cycles should be done carefully. You cannot change the start date, end date, or due date if the billing period status is “in process.” You can only change the bill status from “new” to “In-process” or from “In process” to “Posted.”

If no bills have yet been posted to a billing period, the cycle dates may be modified. However, before changing the dates, all bills generated but not yet posted must be deleted.

If your billing cycle changes, it is recommended that you create a new billing cycle and assign it to tenants.

To modify a billing cycle:

1. From the main menu bar, select **Billing > Cycles**.
2. Browse to the cycle to be modified and select **Edit**.
3. Change the fields as required. If any of the date fields change, generate new cycle periods.
4. Click **Save** to complete the change.

Deleting a Cycle

Before deleting a cycle, make sure there are no tenants assigned to a cycle. This can be accomplished by performing a tenant search using the **Tenant > Search** function and searching on the particular cycle. Before deleting the cycle, any tenants still assigned should all be reassigned to a different cycle.

To delete a cycle:

1. From the main menu bar, select **Billing > Cycles**.
2. Browse to the cycle to be deleted and click **Delete**.
3. Acknowledge the delete prompt by clicking **Yes** or **No**.

Section 8—Using the RateWizard®

Setting Up Rates

Setting up rates is normally done only when the billing system is first installed. Changes after the initial setup are infrequent.

Sample rates are included in the software. They are easy to locate, because the names all begin with "Sample." Rates included are the following:

- Sample Air Rate
- Sample Electric Block Rate
- Sample Electric Demand Rate
- Sample Electric Flat Rate
- Sample Electric Seasonal TOU Rate
- Sample Electric TOU Demand Rate
- Sample Electric TOU Rate
- Sample Electric with kVAR Charge
- Sample Electric with Power Factor
- Sample Gas Rate
- Sample Steam Rate
- Sample Water Rate

For many users, these rates will meet their needs with only slight modifications. Modifying, creating, and deleting rates are accomplished using the RateWizard.

The RateWizard is a tool for creating or modifying rates and pricing schemes in the rates database. Rates are used to calculate bills and apply extra charges.

The RateWizard functions like other wizards, with which you may be familiar, where values that are entered at the beginning determine what subsequent screens appear.

Viewing Rates

The easiest way to become familiar with rates and to see how they are set up is to select one or more of the sample rates and to step through them with the RateWizard. Viewing the rate will serve as a helpful guide in setting up your own or in modifying the sample rates to use as your own.

To view a rate:

1. From the menu bar, select **Billing > RateWizard**.
2. Select **Modify an existing rate**, then click **Next**.
3. Look through the list of available billing rates in the Browse Tree or Browse List grouping. Select the rate you want to view, then click **Next**. For this example, the Sample Electric Block Rate is chosen.
4. The next screen shows you the Rate Name, the Commodity Type, and the Rate Description. Click **Next** to continue.
5. The next screen shows whether the rate is calculated using seasonal or time of use pricing or neither or both. In this case, neither of the options is checked. Click **Next**.
6. The next screen shows what charges are applied to this rate. For this sample rate, there is a customer charge and an energy charge. Click **Next**.

7. The next screen controls the display name for all of the charges. The default names are shown. If you want a different charge name to be displayed on the bill, you can change them on this screen. Click **Next**.
8. The next screen is where you enter the Customer Charge in a dollar amount. In this case, the amount is \$10.00. Click **Next**.
9. The next screen deals with the second (Energy) charge. For this sample, Block Charges are applied, and the unit billed for is kWh. Click **Next**.
10. The next screen shows that the Block Charge is set up in a tiered format. In this case, there are three tiers, but you can have up to ten.
For the Sample Electric Block Rate, this is the last screen in the wizard sequence. You can back track through the screen using the **Back** button. **Cancel** the wizard to close it.
11. To view another rate, go back to step 1 of this procedure, and select a different rate to view.

If you plan to bill using time of use (TOU) or seasonal charges, select the sample for each of these rates and step through them in the RateWizard to see the different options available. Each wizard screen will explain what values are needed.

Rate Vocabulary

Below are terms and phrases that you may encounter on screens when working with the RateWizard. The definitions will explain what values are expected by the wizard.

- Rate name—an identifier for the rate. Since it is displayed in rate lists, it should be recognizable to assure accurate selection.
- Rate description—used to further describe the rate.
- Commodity type—indicates which type of unit is measured: water, air, gas, electric, or steam.
- Seasonal pricing—allows you to define different rates for different times of the year.
 - Name of the season description—typically used to describe calendar seasons (summer, winter, etc.). This must be a unique identifier.
 - Season definition—used to indicate months included in season.
 - Billing across seasons—allows you to set up rules for situations when bills span seasons.
- Time-of-use (TOU) pricing—allows separate price structures based on the time of day energy is used.
 - TOU name—an identifier for the rate. Since it is displayed in TOU lists, it should be recognizable to assure accurate selection. This must be a unique identifier.
 - Peak definitions for each season—allows you to set up on-peak, mid-peak, off-peak, and non-peak hours for each day type during each season defined. Day types are defined as: M=Monday, T=Tuesday, W=Wednesday, R=Thursday, F=Friday, S=Saturday, U=Sunday, K=Weekdays, E=Weekends (all previous exclude holidays), H=Holidays, A=All.
 - Holidays—used to set up holidays for the year. Samples are provided or you can create your own.

- Charges—used to select which charges to apply and to enter the dollar amounts for each.
 - Customer charge—a flat rate charged per billing period.
 - Demand charge—amount for the demand (time-of-use, block charge, units) and interval length (as metered, 15-minute rolling, 30-minute rolling, 60-minute rolling).
 - Energy charge—amount charged is based on the total energy (or usage) for the period.
 - Reactive adjustment—allows you to select the determinant, enter the target power factor or percentage, and the charge amount for kVAR.
 - Surcharge or percent surcharge—used to include tax percentages and a graduated tax of up to 4 levels.
 - Display name—For any of the charges applied, you can select a different name to print on the bill. For example, instead of having “Customer Charge” print on the bill, you can change it to say something else, like “Connect Fee” or any other meaningful title.

Create a New Rate

Before attempting to create or modify new rates, it is highly recommended that you step through several of the sample rates to become familiar with the way they are set up. If it becomes necessary to create a completely new rate, the best way to accomplish it is to follow the steps under the Create a New Rate from an Existing Rate section.

Choosing to **Create a new rate** presents the same wizard screens as seen in the Viewing Rates section but without values filled in.

Create a New Rate from an Existing Rate

The easiest way to create a new rate is to base it on one of the existing sample rates.

To create a new rate from an existing rate:

1. Select **Billing > RateWizard**.
2. Select **Create new rate from existing rate**, then click **Next**.
3. In the “Browse Tree,” select the rate you want to use as a basis for the new rate.
4. The next screen shows the rate’s existing name but has added the phrase “Copy of” in front of the rates name. You can leave the name as is, or you can change it to something different.
5. Make any other changes desired, then click **Next**.
6. Proceed through the rest of the wizard screens, making changes to any of the fields desired.
7. When you have finished making your changes, click **Finish**. Your new rate is now in the system. If at any time during the process you change your mind, click **Cancel** to discard the changes.

Modifying an Existing Rate

To modify an existing rate:

1. Select **Billing > RateWizard**.
2. Select **Modify an existing rate**, then click **Next**.
3. Find the rate you want to modify and select it. Click **Next**.
4. The next screen shows the rate’s existing information. Make whatever changes are desired and click **Next**.

5. The next screen allows you to determine whether the rate is seasonal or time-of-use (TOU) or both, if appropriate, for the rate. Make any changes desired and click **Next**.
6. The screens that follow will depend on the type of rate being modified. Click **Next** to move forward through the screens, making any desired changes. Upon completion, click **Finish** to save the modifications.

NOTE: If you select the option to Modify an Existing Rate and you change the rate name, after clicking **Finish**, you will be prompted with the option to create a new rate rather than modifying the existing rate.

Section 9—Generating Bills

Billing

The billing process consists of generating, reviewing, posting, and printing the bills. Billing is based on the billing cycle that tenants are assigned to. For information on setting up billing cycles, see *Setting Up Billing Cycles* on page 19. For information on assigning a billing cycle to a tenant, see *Setting Up the Tenant's Account* on page 15.

Bills that have errors are not processed during generation and are flagged for further action. Bills can be reviewed and regenerated after corrective action is taken.

Bill Status, In Process and Posted Sections

When you first generate a cycle period, all bills appear in the **In Process** section. As soon as a bill is posted, it is moved immediately into the **Posted** section, and is no longer visible in the **In Process** section. You must go to **Billing > Review Bills** section to see them.

As you generate, post, and print bills, the number of bills in the **In Process** section decreases, while the number of bills visible in the **Posted** section increases. When all bills are finally posted, the cycle period is no longer visible in the **In Process** section, and the status of that cycle period changes from **In Process** to **Posted**.

To generate bills:

1. From the menu bar, select **Billing > Generate Bills**. The **Generate Bills** screen is displayed.
The top pane displays the billing cycles and allows you to select which cycle to bill.
The bottom pane shows any off-cycle bills that are ready to be generated. Off-cycle billing occurs when a tenant leaves or is "closed" at some time other than the end of a billing cycle. If a tenant has been closed, the off-cycle bill task will be recorded in this pane. The "Ready" column will indicate if the bills are ready to be generated.
2. Click the '+' sign besides the cycle for bills that are to be generated. The bill periods are displayed. The default operation is "Generate Selected Period." You can also choose to "Generate Off Cycle Bills."
3. Highlight the period to be generated by clicking on it once. The period will be highlighted in blue.
4. Click **Execute Now** at the bottom of the screen. The **Log Message** screen opens and displays activities, errors, and results as the bills are generated.
5. Upon completion, close the **Log Message** screen.

Reviewing Bills

To review bills:




1. From the menu bar, select **Billing > Review Bills**. The **Review Bills** screen is displayed. The top left corner contains the **Billing Cycles** selection pane. This pane displays the cycles and periods that are available to view.
2. Click the '+' sign besides the cycle to be reviewed. The bill periods are displayed.

- Highlight the period to be reviewed by clicking on it once. The period will be highlighted in blue. The bills for the period are displayed in the Bill Review table located at the bottom of the screen.

Details about the selected billing period are displayed in the Summary grouping in the upper right corner. These details include the number of bills generated, number of bills flagged, the number of bills that passed and the number of bills posted. If the status indicates a flagged condition, the bill requires correction.

- To view more details on the status of the bill, double-click on the arrow in the row of the invoice number or select **View Events** from the **Review** menu. The **Bill Review** window opens with additional information about the bill.

Events that have occurred which relate to the bill appear in the Messages table. The events are categorized into three types as shown below:

	<p>A blue circle with an 'i' in it indicates an event that is for information purposes only.</p>
	<p>A yellow circle with an exclamation point indicates a cautionary warning. There was a warning associated with the bill but a bill was generated.</p>
	<p>A red stop sign indicates that an error occurred and a bill could not be generated.</p>

- Close to return to the **Review Bill** window.

Correcting Exception Bills

Bills showing a flagged status need to be reviewed and corrected

To correct exception bills:

- From the menu bar, select **Billing > Review Bills**. The Review Bills screen is displayed.
- Click on the '+' sign besides the cycle to be reviewed. The bill periods are displayed.
- Highlight the period to be reviewed by clicking on it once. The period will be highlighted in blue and the bills for the period will be displayed in the Bill Review window located at the bottom of the screen. All the bills for the cycle period are displayed. The bills with a Flagged status need to be reviewed and/or corrected.
- Select a bill that has a Flagged status by double clicking anywhere in the invoice record row. The **Bill Information** screen will appear. Some of the exceptions may simply require a review of the bill while others may involve correcting data and regenerating the bill.
- Close the **Bill Information** screen. Sometimes it is helpful to look at the actual bill when performing corrections. To review the actual bill, highlight the bill to be reviewed, then click **Preview**. The bill image is displayed on the screen. Use the scroll bars to view the bill.

Correction Example

For this example, the error is generated because there is an invalid rate assignment. The correct rate needs to be assigned to the account.

To make the correction:

1. Navigate to the Tenant and click the **Account** tab. Verify that the tenant's ID number at the top of the screen matches with that in the **Bill Review** window.
2. Edit the tenant's account, and select the appropriate rate. Click **Save**.
3. Return to the **Review Bills** screen. Highlight the bill that is being reviewed, then recalculate the bill by selecting **Regenerate**. The **Log Message** screen is displayed.
4. When the calculation is complete, click **Close** on the **Log Message** screen. The bill has been recalculated to show the correct charges. Now that the account is correct, the flag status changes to passed. The bill is now ready for posting and printing.

NOTE: Bills with a status of "flagged" can be posted if the associated issues are not considered important. Multiple bills can be regenerated by highlighting several bills and clicking **Regenerate** or by selecting **Regenerate Selected Bill(s)** from the **Review** menu. You will need to close the log screen for each bill.

Posting Bills

Once bills are posted, they are committed to the database and cannot be changed. Posting is typically done before the bills have been printed and sent to the tenant. One or more bills can be posted at a time.

To post bills:

1. From the main menu, select **Billing > Review Bills**. The **Review Bills** screen is displayed.
2. Click the '+' sign besides the cycle to be posted. The bill periods are displayed.
3. Highlight the period to be posted by clicking on it once. The period is highlighted in blue, and the bills for the period are displayed in the **Bill Review** grouping at the bottom of the screen. All the bills for the cycle period are displayed.
4. To post a bill, highlight the bill and click the **Post** button. To post multiple bills, highlight several bills and click the **Post** button. You can also post bills by selecting **Post Selected Bill** from the **Review** menu.

To modify a bill after it is posted, do the following:

1. Locate and highlight the bill in the **Posted** folder.
2. From the **Review** menu, select **Cancel/Re-bill**. The bill will be cancelled, and a new bill will be generated and displayed in the **In-process** folder.

If the following message appears in the log, "Cannot generate until previous bill (invoice ###) has been posted," a bill is not generated. This message indicates that the tenant has another "In-process" bill that has not yet been posted. You need to find that bill in the In-process folder and post it. Then you can regenerate the 'no-bill' invoice.

Printing Bills

Bills for the current billing cycle and bills from previous cycles can be printed from the **Review Bills** screen. Typically bills are printed after they have been posted. Bills can be printed by cycle or individually.

Bills are printed to your system's default printer or to a PDF file. The system printer can be assigned by going to the Windows Start menu and selecting **Start > Printers and Faxes**. A list of all available printers is displayed. Right-click on the printer to be used as the default, and select **Set as Default Printer**.

To print bills:

1. From the main menu, select **Billing > Review Bills**. The **Review Bills** screen is displayed.
2. Click the '+' sign besides the cycle to be printed. The bill periods are displayed.
3. Highlight the period to be printed by clicking on it once. The period is highlighted in blue, and the bills for the period are displayed in the Bill Review grouping at the bottom of the screen. All the bills for the cycle period are displayed.
4. To print a selected bill, click **Print**. To print multiple bills, select **Print All Bills** from the **Review** menu. Choose to print on the system default printer or to a PDF file. The location of the PDF file is displayed in the **Print** dialog window. Note that the **Date Printed** field will be filled with the date that the bills are printed.

Billing Reports

Two Reports are available to provide system information.

Viewing the Event Log

The Event Log records billing system errors, warnings and information messages. Any time a system event is issued, the following items are recorded in the log:

- Event ID—automatically assigned.
- Date and time—date stamp of the event.
- Severity level—information only, warning, error.
- Category—which part of the system the event is associated with (billing, importing).
- Message—a text description of the event.
- Applies to—shows the specific meter involved.
- User—shows user ID or SYSTEM.

The log can show all events, or it can be filtered to show only specified messages. You can specify the following filters:

- Severity type (information, warning, error).
- Category
 - BillCalc (message generated during billing calculation)
 - Import (message generated during device data import)
- Event time—the date and time of the event
- Entity (enter or select either a device or tenant).
- UI Message (enter text to search for in the message field).
- Status (resolved, unresolved, or both).

To view the Event Log:

1. From the main menu, select **Reports > Event Log**. The **Report Options** window opens.
2. Turn on or off any filters desired using the appropriate check boxes or buttons.
3. Click **OK**. The report is generated and displayed on your screen for viewing or printing.

Viewing Load Data

See Using PowerLogic's Energy Profiler® on page 31 for information on the various ways of viewing load data.

Generating the Revenue Summary

The **Revenue Summary** report is based on posted bills information and is generated based on either a date range or all of the posted bills. It can be used as a tool to review how much has been billed in a specific month for all tenants.

To generate the Revenue Summary report:

1. From the main menu, select **Reports > Revenue Summary**. The **Revenue Summary Options** window opens.
2. Select a date range for the report or enter a check mark to choose all.
3. Click **OK**. The report is generated and displayed on your screen for viewing or printing.

Section 10—Viewing Load Data

Using PowerLogic's Energy Profiler®

Viewing load data allows you to visualize energy consumption in a graphical format. You can access this portion of the Billing system in two different ways.

- Select **Reports > Load Data** from the main menu. This method opens the View Load Data window where you can enter or search on a tenant's name, or you can browse for or select a particular device. You can also limit date ranges and interval lengths.
- Select **Review > View Load Data** from the **Billing Review** screen. Using this method takes you to the data associated with the selected bill.

The Energy Profiler enables you to:

- Display daily, weekly, or monthly data.
- Inspect individual data values.
- Graph data in various ways.
- Print graphs.
- Generate statistics on the data.
- Export data into other Windows® products.

Navigating the Profiler Screen

After you have selected a meter, the Energy Profiler opens to display the first slide of collected data for a 24-hour period. The Energy Profiler module has a separate menu bar and icons for navigation.

Menu Bar

File

- Export to CSV—allows you to save data values to a .csv file.
- Print—allows you to print trend graphs.
- Exit—closes the Energy Profiler module.

View

- Next Slide—permits you to move forward to the next graphed time period.
- Previous Slide—permits you to move backward to the previous graphed time period.
- Display Mode—This is graphical view of a device's metered data.
 - By Day
 - By Week
 - By Month

Statistics

- Generate Statistics—used to generate cumulative statistics for a device.





Window

- Cascade—displays all open program windows in cascading style.
- Tile—creates a separate viewing window for each open program window and displays all at the same time.
- Arrange Icons—arranges desktop icons.
- Legend—shows information on the device being shown.
- Table—displays a table containing numeric values of the graphical representation.

Other window selections shown depend on which portions of the system are open.

Icons

Energy Profiler icons are shown in the table below:

Icon	Function
	Use these arrows to move back and forward through the slides.
	Day—Click this button to view data for a 24-hour time period.
	Week—Click this button to view data for a week.
	Month—Click this button to view data for a month.

Examining Load Data

Load data can be viewed in a number of formats including the following:

- To scan through the load data, use the right and left arrow buttons at the bottom of the window. The date and day of the week for the data are displayed in the window title.
- To change from a ribbon graph to a line graph, use the context menu by right-clicking over the graph window and selecting **Line Graph**.
- Click on the **Day**, **Week**, or **Month** buttons to change the scale of the time axis. Switching from days to weeks, for example, provides a bigger picture view of energy use. When **Week** is selected, the time axis always spans from Sunday to Saturday.
- The free-floating legend identifies the device and shows which color on the graph represents the unit being measured.
- To focus on one of the graphed lines (kW or kVAR), temporarily remove the other line by clicking on its line color in the separate legend. To restore the line to the graph, click on the item again in the legend.

If you close the legend window, re-open it by selecting **Window > Legend**.

Viewing Interval Data

The data values that underlie any graph in Energy Profiler can be viewed by selecting **Window > Table** from the main menu. Data for a device is displayed using "Channels." This format is used in both the legend and in the table data. For example, when looking at data for a PM850, the device channels are labeled PM850.1 and PM850.2.

To view interval data:

1. Configure the chart to display for the data you wish to view, i.e., week, day, etc.
2. Select **Window > Table** from the main menu. A new window opens and displays all the data from the chart in tabular form. Each Channel for the device is displayed in two columns. The first column is the actual interval reading (normally kWh or kVARh). The ISC (Interval Status Code) column in the table indicates if any data are missing. Typically blank, the cell will contain an 'm' if there are missing intervals. The data for the file can be exported to a .csv file for use in other programs (such as Microsoft Excel®).

The Tape Measure

You can use the built-in “tape measure” to quickly view numeric data values. Use the following techniques:

- Position the arrow cursor anywhere within the graph area, then click and hold with the left mouse button. The box displays the coordinates of the point of the cursor as **x=** and **y=**.
- Hold down the left mouse button and drag the mouse in any direction to see the distance dragged as **dx=** and **dy=**. You can use this tool to view the difference between two values on one graph, or between two values on different graphs. Try comparing the lowest kW value for a day with the highest kW value for the same day (read the **dy=** value).

Notice that clicking in the neighborhood of a graph does not provide the value of the graph, but rather the value exactly at the point of the cursor.

Exporting Data

When further analysis is desired, data can be exported from the billing system in the form of a .csv file. You can configure the format in either row or column format. (Column format may be more intuitive for those who use Excel.)

To export data:

1. Configure the chart to display for the data you wish to export, i.e., week, day, etc.
2. Select **Window > Table** from the main menu.
3. Select **File > Export to CSV** from the main menu. The **Export** window opens.
4. Choose which format to use, row or column.
5. Select the location for the file to be saved in the **Save File** window.
6. Click **Export**.

Once the file is saved, it can be imported into Excel or other products.

Printing from Energy Profiler

Energy Profiler facilitates printing directly from its graph and table windows. Two approaches are available.

- To print the active window, right-click inside the window and select **Print** from the context menu.
- Or, select **File > Print** from the menu bar.

Either approach works for both tabular or graphical data.

Generating Cumulative Statistics

To generate cumulative statistics for the meter, select **Statistics > Generate Statistics.** from the menu bar.

A tabular window appears showing two rows, each using data from a "channel." The first row displays the channel that contains the units kWh and kW, while the second row displays the other channel containing the units kVAR and kVARh.

The statistics table presents detailed statistical data for each channel. Definitions for each of the statistics presented in the table are listed below.

- **Total**—the total energy usage in the period in kWh or kVARh.
- **Average**—the average load for the period in kW or kVAR, defined as: $\text{Total} / (24 \times \text{the number of days in the period})$.
- **Peak, Peak Date, and Peak Time**—the values of the maximum load for the period in kW or kVAR, and the date and time of their occurrence.
- **Min, Min Date, and Min Time**—the values of the minimum load for the period in kW or kVAR, and the date and time of their occurrence.
- **Load Factor**—a fraction that is defined as: $\text{Total} / (\text{Peak} \times 24 \times \text{the number of days in the period})$

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