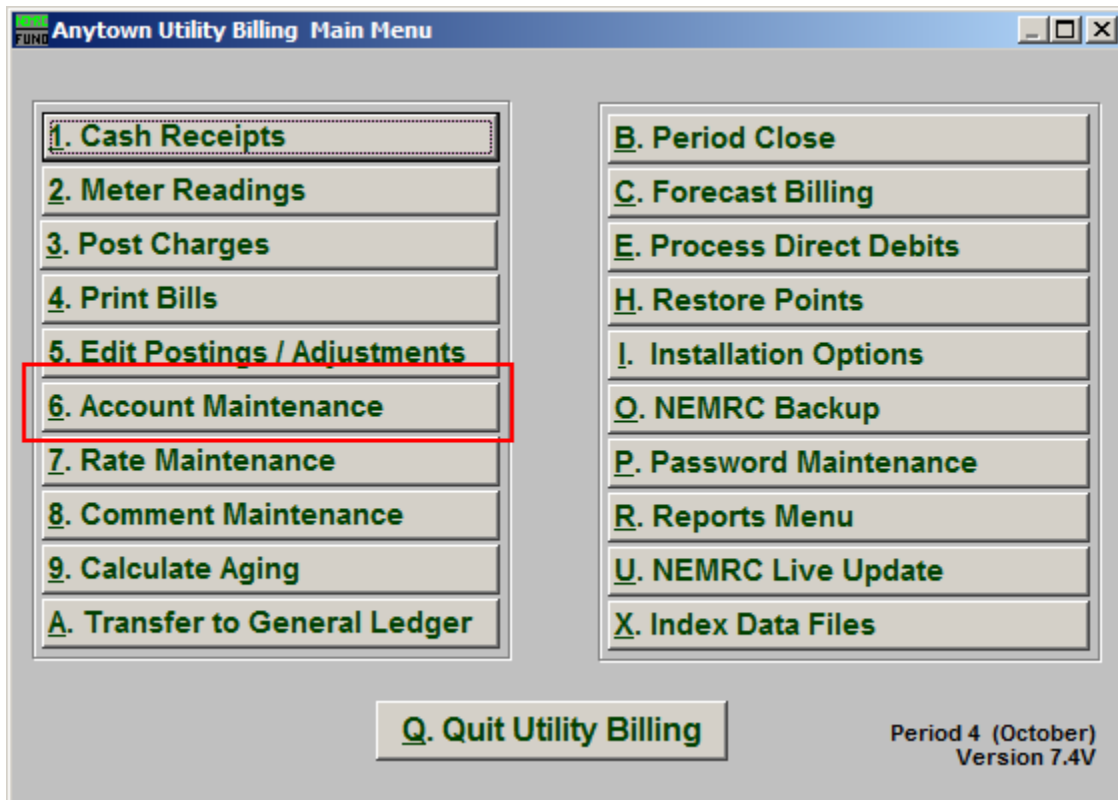


# Utility Billing

## 6. Account Maintenance

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Click on “6. Account Maintenance” from the Main Menu and the following window will appear:

# Utility Billing

## Finding/Creating an Account

Click “6. Account Maintenance” from the Main Menu. The following window appears:

Account Maintenance

Account [ ] - [ ] Find 1

Name [ ] Find Address [ ] Find

Book/Seq [0] [0] Find Location [ ] Find

2 New Account

General | Mailing address | Agreement | Meters | Rates | Cross Acct Meters | Notes | Billing | Other | Direct DB

Last Name [ ] Book [ ] Sequence [ ]

First Name [ ] Service dates [ / / ] to [ / / ]

Ext Name [ ] Status [ ] Misc [ ]

Address [ ] Terms [ ] % [ ] NET [ ]

Carrier Cd [ ]

City [ ] Exempt from Penalty [ ]

State [ ] Zip [ ] Bankrupt Bankruptcy date [ / / ]

Location [ ]

Home Phone [ - - ]

Work Phone [ - - ]

Cell Phone [ - - ]

Email [ ]

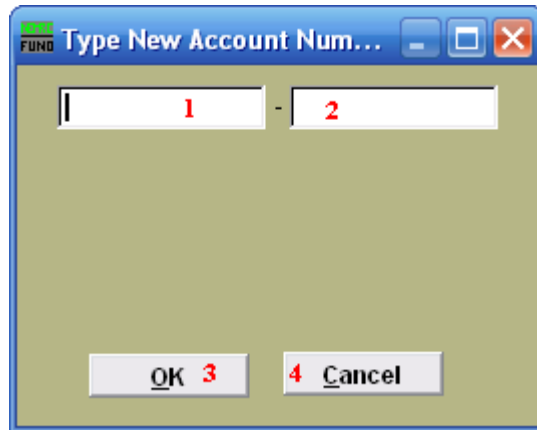
Save Account 3 Cancel

1. Choose the Account you want to modify or edit information for. For additional help on finding accounts with this screen, refer to UB GENERAL ACCOUNT LOOKUPS.
2. **New Account:** Click this button to create a New Account.
3. **Cancel:** Click “Cancel” to cancel and return to the Main Menu.

# Utility Billing

## Creating a New Account

If you Click on “New Account” the following window will appear:



Using your procedure for numbering accounts, type in the Account number of the Account you wish to add. The maximum characters for the Account number (1) and Sub account number (2) are defined in “I. Installation Options” from the Main Menu.

3. **OK:** Click “OK” to create the new account and move on to add information for the new account.
4. **Cancel:** Click “Cancel” to cancel and return to the previous screen.

# Utility Billing

## The “General” tab

Click on the “General” tab and this window will appear:

The screenshot shows the 'Account Maintenance' window with the following fields and their corresponding red numbers:

- Account: 115000450 - 001 (Find)
- Name: HOBBS, CALVIN (Find)
- Address: ROCK ROAD (Find)
- Book/Seq: 1 1130 (Find)
- Location: ROCK ROAD (Find)
- Buttons: 28 Delete Account
- General tab selected
- Last Name: HOBBS (1)
- First Name: CALVIN (2)
- Ext Name: (3)
- Address: (4) ROCK ROAD (5) (6)
- City: ANYTOWN (7)
- State: VT (8) Zip: 05999 (9)
- Location: ROCK ROAD (10)
- Home Phone: - - (11)
- Work Phone: - - (12)
- Cell Phone: - - (13)
- Email: (14)
- Book: 1 (15) Sequence: 16 (16) 1130
- Service dates: 07/15/1997 (17) to: / / (18)
- Status: A (19) Misc: (20)
- Terms: 0.000 % (21) 0 NET 0 (21)
- Carrier Cd: (22)
- 23 Exempt from Penalty
- 24 Bankrupt Bankruptcy date: / /
- Buttons: 26 Save Account 27 Cancel 25 Save & Duplicate Account

- 1. Last Name:** The last name of either the owner of the property, or the last name of the tenant living there.
- 2. First Name:** The first name of either the owner of the property, or the first name of the tenant living there.
- 3. Ext Name:** An extended name of either the owner of the property, or the extended name of the tenant living there, such as “Jr.” or “II”.
- 4. Address:** The address where the bill should be sent. Note: if an address is used in the “Mailing address” tab, then the bill will be sent to that address, and not this address. The first section (4) is used for the number portion of the address. The second (5) and third (6) sections are used for the word portion of the address.
- 7. City, Street, Zip:** The City (7) that the property is in, the street (8) that it is on, and the zip code (9) that it is in.

# Utility Billing

- 10. Location:** The physical location of the property, including street name and house number.
- 11. Home Phone:** The Contact's home phone number.
- 12. Work Phone:** The Contact's work phone number.
- 13. Cell Phone:** The Contact's cell phone number.
- 14. Contact Email:** The Contact's E-mail address.
- 15. Book:** The meter route book that the property is in.
- 16. Sequence:** The order number that the property's meter is read within the book.
- 17. Service dates:** When the account was established (**17**), and when the account was moved to inactive (**18**).
- 19. Status:** A = Active I = Inactive F = Final. Accounts marked "F" will be moved to inactive after the bill is printed and the files are updated, meters will be turned off.
- 20. Misc:** User defined.
- 21. Terms:** Payment terms that are offered, if any.
- 22. Carrier Cd (Carrier Code):** The code of the person who delivers to the address where the bill must be sent. Not typically used, and not required.
- 23. Exempt from penalty:** Check this box if the account is exempt from the penalty calculations.
- 24. Bankrupt:** Check this box if the Account holder is bankrupt, and enter the date the Bankruptcy becomes effective.
- 25. Save & Duplicate Account:** Click "Save & Duplicate Account" to save this account, and duplicate it. Refer to the "Save & Duplicate Account" section below for more.
- 26. Save Account:** Click "Save Account" to save any changes and return to the Account Lookup screen.
- 27. Cancel:** Click "Cancel" to go back to the Account Lookup screen without saving.
- 28. Delete Account:** Click this button to delete this Account.

# Utility Billing

## The “Mailing Address” tab

Click on the “Mailing address” tab and this window will appear:

Leave this entire tab blank if you wish to use the Address from the “General” tab as the address to mail the bill to. This tab becomes highlighted if information is entered into it.

- 1. Address:** The address where the bill should be sent.
- 2.** Additional space for the Address.
- 3. City, Street, Zip:** The City (**3**), state (**4**) and the zip code (**5**) for mailing.
- 6. Carrier Cd (Carrier Code):** the code of the person who delivers to the address where the bill must be sent. Not typically used, and not required.
- 7. Save & Duplicate Account:** Click “Save & Duplicate Account” to save this account, and duplicate it. Refer to the “Save & Duplicate Account” section below for more.
- 8. Save Account:** Click “Save Account” to save any changes and return to the Account Lookup screen.

## Utility Billing

- 9. Cancel:** Click “Cancel” to go back to the Account Lookup screen without saving.
- 10. Delete Account:** Click this button to delete this Account.

# Utility Billing

## The “Agreement” tab

Click on the “Agreement” tab and this window will appear:

The screenshot shows a software window titled "Account Maintenance". At the top, there are input fields for "Account" (115000450 - 001) and "Name" (HOBBS, CALVIN), each with a "Find" button. To the right is a "Delete Account" button with a red "5" above it. Below these are fields for "Address" (ROCK ROAD) and "Location" (ROCK ROAD), each with a "Find" button. A "Book/Seq" field shows "1" and "1130" with a "Find" button. A tabbed interface at the bottom includes "General", "Mailing address", "Agreement" (highlighted with a dotted border), "Meters", "Rates", "Cross Acct Meters", "Notes", "Billing", "Other", and "Direct DB". A large text area below the tabs contains the number "1". At the bottom of the window are buttons for "Save Account" (with a red "3" above it), "Cancel" (with a red "4" above it), and "Save & Duplicate Account" (with a red "2" above it).

This tab becomes highlighted if information is entered into it.

1. This memo field is user defined. The recommendation is that agreements be established in a uniform way such that review can be done on a monthly basis. This information will appear on the “Agreement Report” found on the Reports Menu.
2. **Save & Duplicate Account:** Click “Save & Duplicate Account” to save this account, and duplicate it. Refer to the “Save & Duplicate Account” section below for more.
3. **Save Account:** Click “Save Account” to save any changes and return to the Account Lookup screen.
4. **Cancel:** Click “Cancel” to go back to the Account Lookup screen without saving.
5. **Delete Account:** Click this button to delete this Account.



# Utility Billing

## The “Meters” tab

Click on the “Meters” tab and this window will appear:

Account Maintenance

Account: 115000450 - 001 Find 7 Delete Account

Name: HOBBS, CALVIN Find Address: ROCK ROAD Find

Book/Seq: 1 1130 Find Location: ROCK ROAD Find

General | Mailing address | Agreement | **Meters** | Rates | Cross Acct Meters | Notes | Billing | Other | Direct DB

Number	Location	Serial Number	Last Read Date	Last Reading
41500807	TURNED OFF 01/14/03		01/14/03	7827
53196353	RIGHT SIDE NEAR OIL FILLS	29591201	09/19/07	72

Add a meter to the account Change selected meter Delete selected meter

1 2 3

Save Account 5 6 Cancel 4 Save & Duplicate Account

- 1. Add a meter to the account:** Click to add a meter to this account. Clicking on “Add a meter to the account” will bring up the following window, where you may edit the information for the selected meter.
- 2. Change selected meter:** Click on the meter number to select from the table then Click to change information about a meter that already exists on this account. Clicking on “Change selected meter” will bring up the following window, where you may edit the information for the selected meter.
- 3. Delete selected meter:** Click on the meter number to select from the table then Click to delete the selected meter from this account.
- 4. Save & Duplicate Account:** Click “Save & Duplicate Account” to save this account, and duplicate it. Refer to the “Save & Duplicate Account” section below for more.

## Utility Billing

5. **Save Account:** Click “Save Account” to save any changes and return to the Account Lookup screen.
6. **Cancel:** Click “Cancel” to go back to the Account Lookup screen without saving.
7. **Delete Account:** Click this button to delete this Account.

# Utility Billing

## Meter Information

The screenshot shows a 'Meter Maintenance' dialog box with two tabs: 'Meter information' and 'Readings in HCft'. The 'Meter information' tab is active. It contains several input fields and controls. On the left side, there are fields for 'Meter #' (1), 'Type' (2), 'Location' (3), 'Serial #' (4), 'Units' (A, 5), 'GANGED TO' (6), 'Installed' (06/23/2009, 8), 'Turned on' (06/23/2009, 9), and 'Turned off' (/, /, 10). Below these is a 'Gang Effects' section with two radio buttons: 'Add consumption to gang' and 'Subtract consumption from gang'. On the right side, there are fields for 'Touch Test' (11), 'MXU #' (12), 'Latitude' (13, 0.0), 'Longitude' (14, 0.0), '# of Dials' (0, 15), 'Size' (16), and 'Manufacturer' (17). At the bottom, there are 'OK' (18) and 'Cancel' (19) buttons.

- 1. Meter #:** The register number of the individual meter, often found on the head of the meter.
- 2. Type:** User defined, up to four (4) characters.
- 3. Location:** Where physically to obtain the meter reading, at the place of service described in the Account tab of Account Maintenance. Ex. “next to front porch.”
- 4. Serial #:** Found on the brass housing of the meter.
- 5. Units:** The units that the meter reads in. Important that it matches the actual units that the meter reads in. This is very critical when using any automated reading system.
- 6. GANGED TO:** Fill this in with any six (6) digit value (usually start with “000001” for the first ganged meter, then “000002” for the next, and so on) when this meter’s consumption has ties with other meter consumptions for purposes of bill calculation. If the meter is not found, Click “Yes” to add it. **This is where you add a ganged meter to this account.** The ganged meter will appear in the table when you Click the “OK” button.

# Utility Billing

- 7. Gang effects:** Adding to the ganged meter consumption (+) or subtracting from it (-).
- 8. Installed:** Enter the date that the meter was installed.
- 9. Turned on:** Enter the date the meter was turned on. This date must be on or after the installed date.
- 10. Turned off:** Enter the date when the meter was turned off. This date must be on or after the turned on date.
- 11. Touch Test:** Y = yes, this is a touch read or radio read meter. N = no, this is a manual read meter.
- 12. MXU #:** Radio read identification number transmitted to a receiver.
- 13. Latitude:** Alternative locatable address via GPS.
- 14. Longitude:** Alternative locatable address via GPS.
- 15. # of Dials:** The number of dials on this meter that are expected to be read.
- 16. Size:** Size of installed meter.
- 17. Manufacturer:** Manufacturer of installed meter.
- 18. OK:** Click this button to save the information and return to the Meter tab. Note: If this is a new meter, you need to go to the Meter Readings tab before you leave this window.
- 19. Cancel:** Click this button to return to the Meter tab without saving.



## Utility Billing

6. **Average Consumption:** The average consumption over the dates. If a date is left empty, and the reading is zero (0), then it will not be included in this calculation.
7. **OK:** Click this button to save the information and return to the Meter tab.
8. **Cancel:** Click this button to return to the Meter tab without saving.

Only the last fourteen (14) meter readings are displayed.

# Utility Billing

## The “Rates” tab

Click on the “Rates” tab and this window will appear:

Account Maintenance

Account: 115000450 - 001 Find 13 Delete Account

Name: HOBBS, CALVIN Find Address: ROCK ROAD Find

Book/Seq: 1 1130 Find Location: ROCK ROAD Find

General | Mailing address | Agreement | Meters | **Rates** | Cross Acct Meters | Notes | Billing | Other | Direct DB

3	4	5	6	7	8	9
Rate Code	Description	Service	Status	Units	Linked to Meter	Meter Reading Entered
FP	Fire Protection	W	A	2250.00		
UC1	User Class 1 (5/8", 3/4")	W	A	1.00	53196353	<input type="checkbox"/>

Add a rate to the account 1 Delete selected rate from the account 2

Save Account 11 12 Cancel 10 Save & Duplicate Account

All rates to be used must be defined in Rate Maintenance.

The Meter Tab must be set up before the Rates tab if you use Meters in your rate calculations.

- 1. Add a Rate to the Account:** Click this button to add a Rate to this account.
- 2. Delete selected Rate from the Account:** Select a rate that is to be deleted from this account, and Click this button. When prompted to confirm, double check that you have selected the rate that needs to be deleted, and Click “Yes”.
- 3. Rate Code:** Select a Rate Code to use the Rate that is attached to the code. Create a new Rate and Rate Code through “7. Rate Maintenance” on the Main Menu.
- 4. Description:** The description of the Rate, as written in “7. Rate Maintenance” section.
- 5. Service:** The service code defined in Installation that the selected rate is for.
- 6. Status:** A = active I = Inactive.

## Utility Billing

- 7. Units:** Must be a value greater than zero (0). The unit factor for the rate.
- 8. Linked to Meter:** Link this rate to a specific meter that is attached to this account through the “Meters” tab.
- 9. Meter Reading Entered:** Checked means that you are ready to calculate this bill on this rate for this account, with the present meter readings in place. Unchecked will mean that you need to enter new readings, and the system will not allow you to calculate a bill for this rate until you enter up-to-date readings.
- 10. Save & Duplicate Account:** Click “Save & Duplicate Account” to save this account, and duplicate it. Refer to the “Save & Duplicate Account” section below for more.
- 11. Save Account:** Click “Save Account” to save any changes and return to the Account Lookup screen.
- 12. Cancel:** Click “Cancel” to go back to the Account Lookup screen without saving.
- 13. Delete Account:** Click this button to delete this Account.



# Utility Billing

## The “Cross Acct Meters” tab

The following window is what should appear under the “Meters” tab before you do anything under the “Cross Acct Meters” tab.

Account Maintenance

Account: 115000450 - 001 Find Delete Account

Name: HOBBS,CALVIN Find Address: ROCK ROAD Find

Book/Seq: 1 1130 Find Location: ROCK ROAD Find

General Mailing address Agreement Meters Rates Cross Acct Meters Notes Billing Other Direct DB

Number	Location	Serial Number	Last Read Date	Last Reading
41500807	TURNED OFF 01/14/03		01/14/03	7827
53196353	RIGHT SIDE NEAR OIL FILLS	29591201	09/19/07	72
GANGED413497			/ /	0

Add a meter to the account Change selected meter Delete selected meter

Save Account Cancel Save & Duplicate Account

Refer to the “Meters” tab, “Meter Information,” item 6, for more information.

# Utility Billing

Click on the “Cross Acct Meters” tab and this window will appear:

The screenshot shows the 'Account Maintenance' window with the 'Cross Acct Meters' tab selected. The window contains several input fields and buttons. At the top, there are fields for 'Account' (115000450 - 001), 'Name' (HOBBS,CALVIN), 'Address' (ROCK ROAD), 'Book/Seq' (1, 1130), and 'Location' (ROCK ROAD). Below these are tabs for 'General', 'Mailing address', 'Agreement', 'Meters', 'Rates', 'Cross Acct Meters', 'Notes', 'Billing', 'Other', and 'Direct DB'. The 'Cross Acct Meters' tab is active, showing a 'Ganged Meter' field with the value '413490' and an 'Add New Ganged Meter' button. Below this is a table with columns: Account, Sub account, Meter, and Effect. The table has one row with values: 2, 3, 4, 5. Below the table are 'Add' and 'Delete' buttons. At the bottom of the window are 'Save Account', 'Cancel', and 'Save & Duplicate Account' buttons.

Account	Sub account	Meter	Effect
2	3	4	5

You must have a ganged meter under the “Meters” tab before you can use this tab. Make sure you know the Account number and Meter number for the Account/Meter that effects this ganged meter prior to editing this tab.

- 1. Add:** Click this button, and then Click on the field to enter the account and meter that this ganged meter is connected to.
- 2. Account:** Type the first part of the account number here, and Click on the “Sub” field.
- 3. Sub:** Type the sub account number here, and Click on the “Meter” field.
- 4. Meter:** Type the exact Meter number here, and Click on the “Effects” field.
- 5. Effects:** Type either – (to the right of the “0” key) or + (hold the “shift” key and hit the “=” key) from the keyboard to determine whether this meter effects this ganged meter in a positive or negative way. Keys on the 9 key number pad work as well.

**For additional help:** Contact NEMRC support.

## Utility Billing

- 6. Save & Duplicate Account:** Click “Save & Duplicate Account” to save this account, and duplicate it. Refer to the “Save & Duplicate Account” section below for more.
- 7. Save Account:** Click “Save Account” to save any changes and return to the Account Lookup screen.
- 8. Cancel:** Click “Cancel” to go back to the Account Lookup screen without saving.
- 9. Delete Account:** Click this button to delete this Account.

# Utility Billing

## The “Notes” tab

Click on the “Notes” tab and this window will appear:

Account Maintenance

Account: 115000450 - 001 Find 5 Delete Account

Name: HOBBS, CALVIN Find Address: ROCK ROAD Find

Book/Seq: 1 1130 Find Location: ROCK ROAD Find

General | Mailing address | Agreement | Meters | Rates | Cross Acct Meters | **Notes** | Billing | Other | Direct DB

1

Notes 1

Notes 2

Notes 3

Notes 4

Notes 5

Notes 6

Notes 7

Notes 8

Save Account 3 4 Cancel 2 Save & Duplicate Account

- 1. Notes:** All notes are user defined. Each note field should be used in a uniform way.
- 2. Save & Duplicate Account:** Click “Save & Duplicate Account” to save this account, and duplicate it. Refer to the “Save & Duplicate Account” section below for more.
- 3. Save Account:** Click “Save Account” to save any changes and return to the Account Lookup screen.
- 4. Cancel:** Click “Cancel” to go back to the Account Lookup screen without saving.
- 5. Delete Account:** Click this button to delete this Account.

# Utility Billing

## The “Billing” tab

Click on the “Billing” tab and this window will appear:

The screenshot shows a software window titled "Account Maintenance" with a blue title bar. The window contains several input fields and buttons. At the top, there are fields for "Account" (115000450 - 001), "Name" (HOBBS,CALVIN), "Book/Seq" (1 1130), "Address" (ROCK ROAD), and "Location" (ROCK ROAD). A "Delete Account" button is visible next to the account number. Below these fields is a tabbed interface with tabs for "General", "Mailing address", "Agreement", "Meters", "Rates", "Cross Acct Meters", "Notes", "Billing" (which is selected and highlighted with a dotted border), "Other", and "Direct DB". In the center of the main area, there are three buttons: "Print", "Preview", and "File". At the bottom of the window, there are four buttons: "Save Account", "Cancel", and "Save & Duplicate Account". Red numbers 1 through 7 are placed below the buttons to indicate their sequence: 1 under Print, 2 under Preview, 3 under File, 4 under Save & Duplicate Account, 5 under Save Account, 6 under Cancel, and 7 under Delete Account.

This is often used for customer inquiry during closings.

A report of the customer balances shown by aging and by balance type can be output in one of three ways:

- 1. Print:** Click this button to print this report. Refer to GENERAL PRINTING for more information.
- 2. Preview:** Report Click this button to preview this report. Refer to GENERAL PREVIEW for more information.
- 3. File:** Click this button to save this report on this computer. Refer to GENERAL FILE for more information.
- 4. Save & Duplicate Account:** Click “Save & Duplicate Account” to save this account, and duplicate it. Refer to the “Save & Duplicate Account” section below for more.

## Utility Billing

5. **Save Account:** Click “Save Account” to save any changes and return to the Account Lookup screen.
6. **Cancel:** Click “Cancel” to go back to the Account Lookup screen without saving.
7. **Delete Account:** Click this button to delete this Account.

# Utility Billing

## The “Other” tab

Click on the “Other” tab and this window will appear:

Account Maintenance

Account: 115000450 - 001 Find 11 Delete Account

Name: HOBBS, CALVIN Find Address: ROCK ROAD Find

Book/Seq: 1 1130 Find Location: ROCK ROAD Find

General | Mailing address | Agreement | Meters | Rates | Cross Acct Meters | Notes | Billing | **Other** | Direct DB

	1	2	3	4	5
	Minimum charge code	Bill comment code	Tax %	Surcharge code	Allocation (gals/day)
6 Entire Bill	<input type="text"/>	<input type="text"/>			
7 Water	<input type="text"/>	<input type="text"/>	0.000	<input type="text"/>	<input type="text" value="0"/>
7 Sewer	<input type="text"/>	<input type="text"/>	0.000	<input type="text"/>	<input type="text" value="0"/>
7	<input type="text"/>	<input type="text"/>	0.000	<input type="text"/>	<input type="text" value="0"/>
7	<input type="text"/>	<input type="text"/>	0.000	<input type="text"/>	<input type="text" value="0"/>

Save Account 9 10 Cancel 8 Save & Duplicate Account

- 1. Minimum Charge Bill Codes:** Rates, that are set in “7. Rate Maintenance” off the Main Menu, may be attached here to this specific account. This will apply the specified Minimum Charge from the Rate code.
- 2. Bill Comment Codes:** These fields are used to add a Comment Code to this individual account’s bill. Doing this will also overwrite a system-wide Comment set up in “I. Installation Options” off the Main Menu.
- 3. Tax %:** Sales tax that is to be collected. Type the %, for example: “5.700”. This is unique to the specific service.
- 4. Surcharge Bill Codes:** Rates, that are set in “7. Rate Maintenance” from the Main Menu, may be attached here to calculate on entire bill of a service. Surcharges are done by a fixed rate calculation as a percentage.
- 5. Allocation (gals/day):** These fields are used to track allocations per service for this customer. There is an Allocation Report available from the Report Menu.

## Utility Billing

6. **Entire Bill:** Only things in this row are applied to the entire bill.
7. **Rows Below “Entire Bill”:** Used to define different Services, which are set in “I. Installation Options” off the Main Menu.
8. **Save & Duplicate Account:** Click “Save & Duplicate Account” to save this account, and duplicate it. Refer to the “Save & Duplicate Account” section below for more.
9. **Save Account:** Click “Save Account” to save any changes and return to the Account Lookup screen.
10. **Cancel:** Click “Cancel” to go back to the Account Lookup screen without saving.
11. **Delete Account:** Click this button to delete this Account.



# Utility Billing

## The “Direct DB” tab

Click on the “Direct DB” tab and this window will appear:

The screenshot shows the 'Account Maintenance' window with the 'Direct DB' tab selected. The window title is 'Account Maintenance'. At the top, there are fields for 'Account' (115000450 - 001) and 'Name' (HOBBES, CALVIN). Below that are 'Book/Seq' (1, 1130) and 'Address' (ROCK ROAD). A 'Delete Account' button is visible. The 'Direct DB' tab is active, showing fields for 'Direct Debit Last Name' (1), 'Banks Account Holders Name' (2), 'DFI number of bank' (3), 'Bank account number' (4), 'Account Type' (5) with radio buttons for 'Checking' and 'Savings', and 'Phone' (6). At the bottom, there are buttons for 'Save Account' (8), 'Cancel' (9), and 'Save & Duplicate Account' (7).

- 1. Direct Debit Last Name:** Enter the last name from the General tab in this field. This is used to confirm that the owner has not been changed during the processing of direct debits, “E. Process Direct Debits” from the Main Menu.
- 2. Banks Account Holders Name:** Enter the name as it appears on the bank account. This will be transferred and checked by the banking institute while processing.
- 3. ABA:** Enter the routing number for the banking institution from which the payment will be drawn.
- 4. Account:** Enter the customer account number that the funds will be drawn from during processing.
- 5. Account Type:** Check the appropriate type of account at the institution. The bank will confirm that the account type is correct during processing.

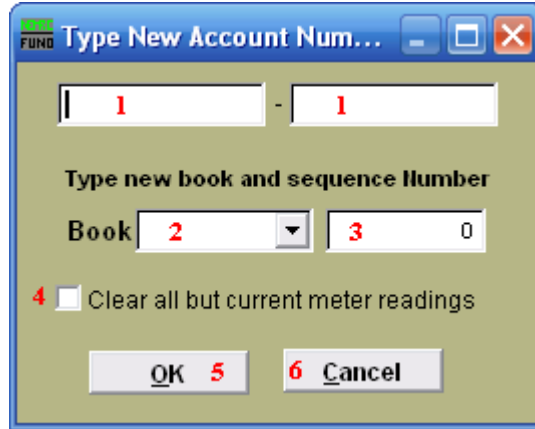
## Utility Billing

- 6. Phone:** Enter the contact phone number of the owner of the bank account from which the funds will be drawn in the event of a processing error.
- 7. Save & Duplicate Account:** Click “Save & Duplicate Account” to save this account, and duplicate it. Refer to the “Save & Duplicate Account” section below for more.
- 8. Save Account:** Click “Save Account” to save any changes and return to the Account Lookup screen.
- 9. Cancel:** Click “Cancel” to go back to the Account Lookup screen without saving.
- 10. Delete Account:** Click this button to delete this Account.

# Utility Billing

## Save and Duplicate Account

Click this button to save and duplicate this account. When you click on this, the Account will be saved, and the following window will appear:



The screenshot shows a dialog box titled "Type New Account Num..." with a green title bar. The dialog has a light green background. At the top, there are two text input fields, each containing the number "1", separated by a hyphen. Below this, the text "Type new book and sequence number" is displayed. Underneath, there is a "Book" label followed by a dropdown menu showing "2" and a text input field containing "3". To the right of the "3" is a small "0". Below the "Book" section, there is a checkbox labeled "4" followed by the text "Clear all but current meter readings". At the bottom, there are two buttons: "OK" with a small "5" next to it, and "Cancel" with a small "6" next to it.

1. Using your procedure for numbering accounts, type in the account number of the new account you wish to duplicate this account to.
2. **Book:** The meter route book that the property is in.
3. **Sequence:** The order number that the property's meter is read within the book.
4. **Clear all but current meter readings?:** Checking this box, by Clicking it, will cause all meter readings for this account, except for the current meter readings, to be cleared when you click "OK".
5. **OK:** Click the "OK" button to duplicate the Accounts information into the new account.
6. **Cancel:** Click cancel to go back to the Account Lookup screen.