

Logics 2023 Q4 Release Notes

The items below are released as fixes or features as part of the products listed below. The release will be effective close of business January 2, 2024. These release notes will focus on the new Asset Location or Service Line Materials reporting feature described below.

Asset Locations and Service Line Materials Tracking

Logics has added a new Asset Location record to the system to represent a "location" for one or more assets associated with an Account Location (i.e., all accounts with a common base Account Number). This provides continuity across turn-on/turn-off (of accounts) and change-out/add/remove (of assets) and a way to group related assets (e.g., backflow devices associated with specific meters).

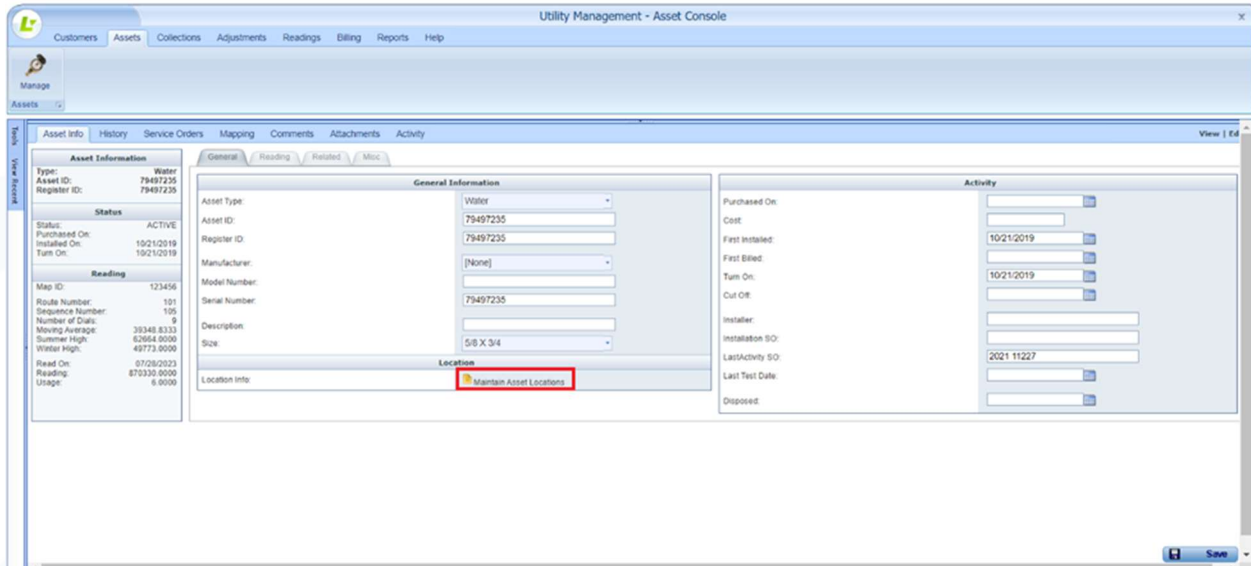
The following instructions describe how to use the new Asset Location feature in the Utilities management module.

Maintain Asset Location

Several fields previously on the asset which are truly characteristics of "the asset at the location" have been moved from the asset to the asset location:

- Route Number
- Reading Sequence
- Map ID
- Latitude*
- Longitude*
- Reading Instruction Code/Comment & Text
- Meter Location Code/Comment & Text

The Asset Location information can be accessed by clicking on the Maintain Asset Locations link.



Utility Management - Asset Console

Customers Assets Collections Adjustments Readings Billing Reports Help

Manage

Assets

Asset Info History Service Orders Mapping Comments Attachments Activity View | Ed

Asset Information

Type: Water
 Asset ID: 79497235
 Register ID: 79497235

Status

Status: ACTIVE
 Purchased On: 10/21/2019
 Installed On: 10/21/2019
 Turn On:

Reading

Map ID: 123456
 Route Number: 101
 Sequence Number: 105
 Number of Dials: 9
 Moving Average: 39348.8333
 Summer High: 62664.0000
 Winter High: 49773.0000
 Read On: 07/28/2023
 Reading: 87030.0000
 Usage: 6.0000

General Information

Asset Type: Water
 Asset ID: 79497235
 Register ID: 79497235
 Manufacturer: [None]
 Model Number:
 Serial Number: 79497235
 Description:
 Size: 5/8 X 3/4

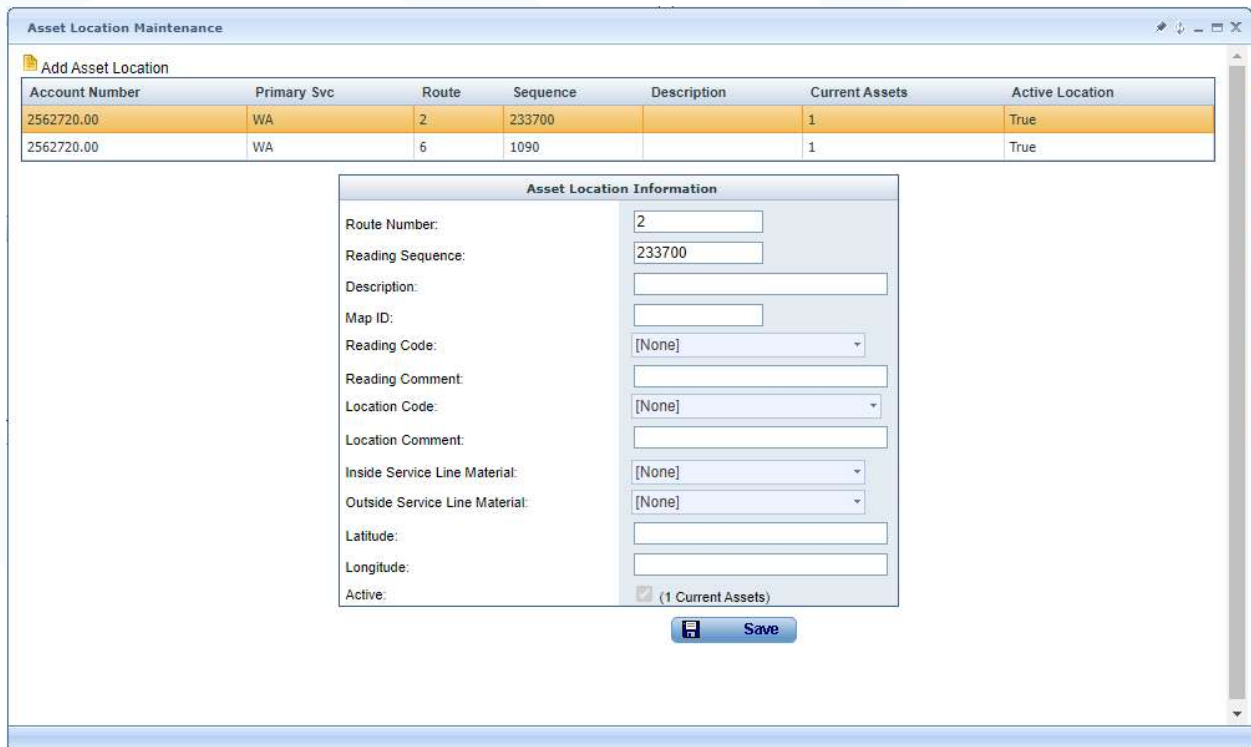
Location

Location Info: Maintain Asset Locations

Activity

Purchased On:
 Cost:
 First Installed: 10/21/2019
 First Billed: 10/21/2019
 Turn On:
 Cut Off:
 Installer:
 Installation SO:
 Last Activity SO: 2021 11227
 Last Test Date:
 Disposed:

Save



Asset Location Maintenance

Add Asset Location

Account Number	Primary Svc	Route	Sequence	Description	Current Assets	Active Location
2562720.00	WA	2	233700		1	True
2562720.00	WA	6	1090		1	True

Asset Location Information

Route Number: 2
 Reading Sequence: 233700
 Description:
 Map ID:
 Reading Code: [None]
 Reading Comment:
 Location Code: [None]
 Location Comment:
 Inside Service Line Material: [None]
 Outside Service Line Material: [None]
 Latitude:
 Longitude:
 Active: (1 Current Assets)

Save

Note: Latitude and Longitude associated with MXU are currently still on the asset with the related MXU Number and MXU Type for compatibility.

These fields are no longer available directly in the asset maintenance in their previous locations and may be maintained on the asset location record (or records) associated with the asset. Note that, if multiple assets are associated with a single asset location, changing the asset location data impacts all of them.

Additionally, a "Description" field exists on the new record to allow distinguishing data. For example, if a particular asset location is for a barn meter, then the description might be something like "Barn". The Description field on the asset may previously have been used for a similar purpose and the Description on the Asset Location will have been pre-populated with data from that field on the Asset though it is not a direct migration; the old field on the asset still exists independently of it.

Service Materials Tracking

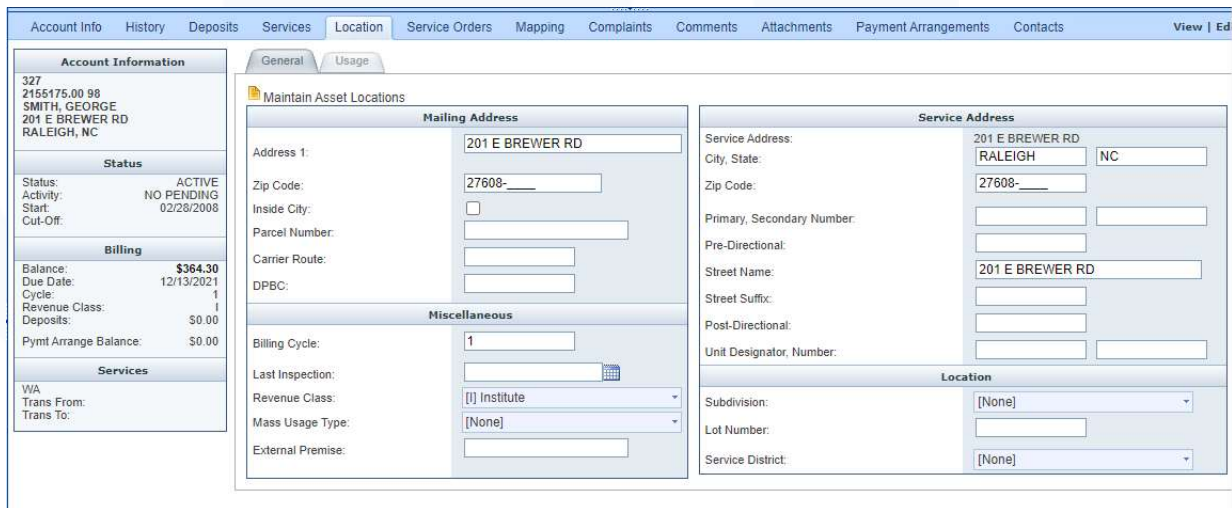
There are also two new fields added to the asset location record:

- Service Line Material (Inside)
- Service Line Material (Outside)

These allow selecting the options specified by the EPA and/or local service line materials reporting. Inside refers to the customer owned section of the line and Outside to the utility owned section of the line.

Maintain from Account Location Maintenance

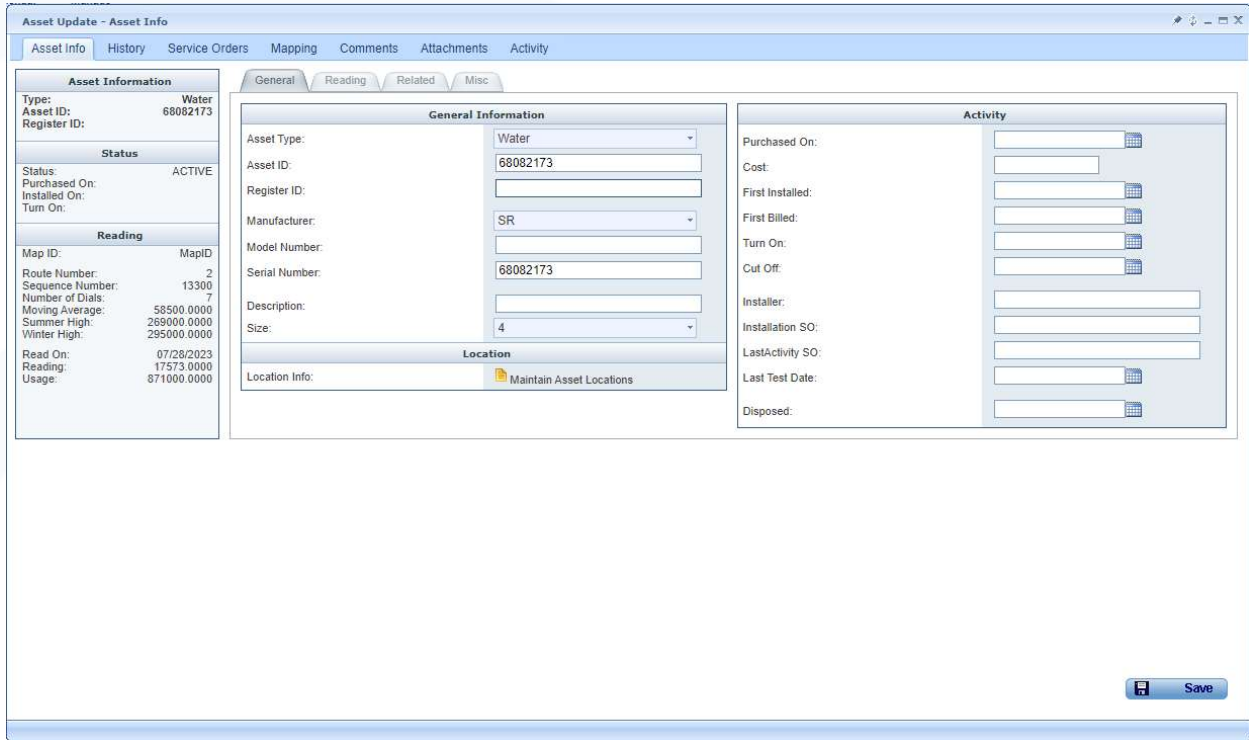
Asset Locations may be added and maintained in a maintenance accessible from the Location tab on the account. Like the rest of the data on the location tab, this is shared across all accounts at the location.



Account Information	Mailing Address	Service Address	Location
Account Information 327 2155475.00 98 SMITH, GEORGE 201 E BREWER RD RALEIGH, NC <hr/> Status Status: ACTIVE Activity: NO PENDING Start: 02/28/2008 Cut-Off: <hr/> Billing Balance: \$364.30 Due Date: 12/13/2021 Cycle: 1 Revenue Class: Deposits: \$0.00 Pymt Arrange Balance: \$0.00 <hr/> Services WA Trans From: Trans To:	Mailing Address Address 1: 201 E BREWER RD Zip Code: 27608-____ Inside City: <input type="checkbox"/> Parcel Number: Carrier Route: DPBC: <hr/> Miscellaneous Billing Cycle: 1 Last Inspection: Revenue Class: [I] Institute Mass Usage Type: [None] External Premise:	Service Address Service Address: 201 E BREWER RD City, State: RALEIGH NC Zip Code: 27608-____ Primary, Secondary Number: Pre-Directional: Street Name: 201 E BREWER RD Street Suffix: Post-Directional: Unit Designator, Number:	Location Subdivision: [None] Lot Number: Service District: [None]

Maintain from Asset Maintenance

Asset Locations may be maintained (though not added) in a maintenance accessible from Asset Maintenance; all asset locations with which the asset has been associated may be accessed from the asset.



Asset Update - Asset Info

Asset Info | History | Service Orders | Mapping | Comments | Attachments | Activity

Asset Information

Type: Water
 Asset ID: 68082173
 Register ID:

Status

Status: ACTIVE
 Purchased On:
 Installed On:
 Turn On:


Reading

Map ID: MapID
 Route Number: 2
 Sequence Number: 13300
 Number of Dials: 7
 Moving Average: 58500.0000
 Summer High: 269000.0000
 Winter High: 295000.0000
 Read On: 07/29/2023
 Reading: 17573.0000
 Usage: 871000.0000

General Information


Asset Type: Water
 Asset ID: 68082173
 Register ID:
 Manufacturer: SR
 Model Number:
 Serial Number: 68082173
 Description:
 Size: 4

Location

Location Info:  Maintain Asset Locations

Activity

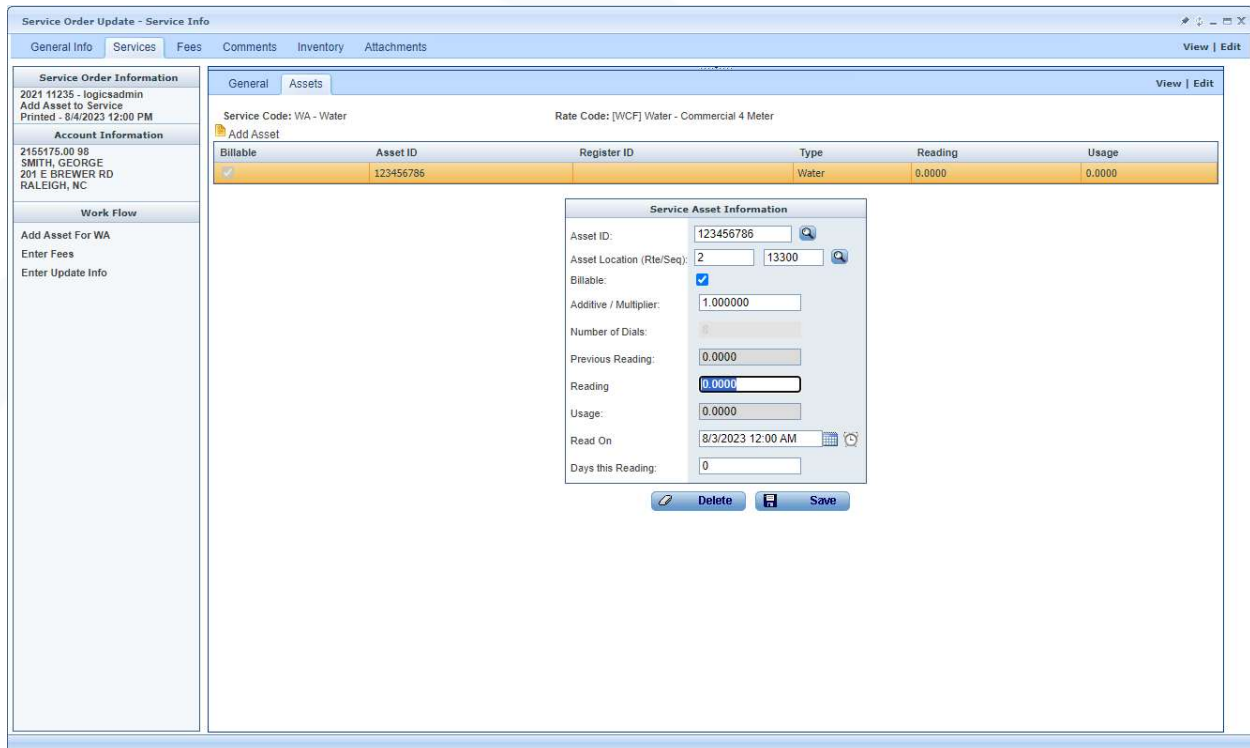
Purchased On:
 Cost:
 First Installed:
 First Billed:
 Turn On:
 Cut Off:
 Installer:
 Installation SO:
 LastActivity SO:
 Last Test Date:
 Disposed:

 Save

Maintain from Service Orders

Asset Locations may also be maintained and added from Service Order data entry on the following Service Order Types:

- Turn On Existing
- Add New Service
- Add Asset to Service

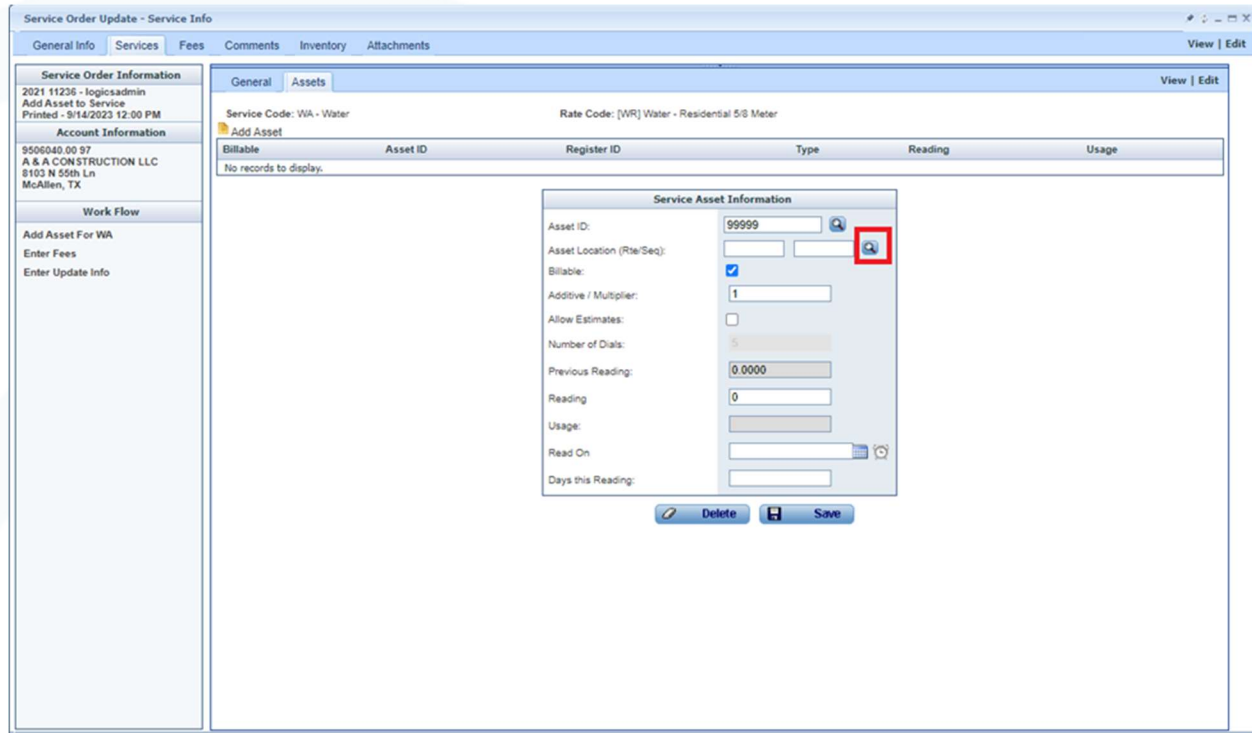


The screenshot shows a web application window titled "Service Order Update - Service Info". The window has several tabs: "General Info", "Services", "Fees", "Comments", "Inventory", and "Attachments". The "Assets" tab is currently selected. On the left side, there is a sidebar with sections for "Service Order Information", "Account Information", and "Work Flow". The main content area shows a table with columns: "Billable", "Asset ID", "Register ID", "Type", "Reading", and "Usage". A single row is visible with the following data: Billable (checked), Asset ID (123456786), Register ID (empty), Type (Water), Reading (0.0000), and Usage (0.0000). A "Service Asset Information" dialog box is open in the center, containing fields for: Asset ID (123456786), Asset Location (Rte/Seq) (2 / 13300), Billable (checked), Additive / Multiplier (1.000000), Number of Dials (0), Previous Reading (0.0000), Reading (0.0000), Usage (0.0000), Read On (8/3/2023 12:00 AM), and Days this Reading (0). There are "Delete" and "Save" buttons at the bottom of the dialog.

On these Service Order types it will be possible (and, in some cases, necessary) to select or create the asset location you want to associate the asset being added with.

On a **Turn On Existing** Service Order where the asset is inherited from the previous account (the most common case) it will populate the existing asset location though it will allow the user to change the asset location if desired.

For an **Add New Service** or **Add Asset** Service Order or for a **Turn On Existing** where no asset has been inherited and one needs to be added it will be necessary to select the asset location.



The screenshot shows a web application window titled "Service Order Update - Service Info". The window has a navigation bar with tabs for "General Info", "Services", "Fees", "Comments", "Inventory", and "Attachments". The "Services" tab is active. On the left, there is a sidebar with sections for "Service Order Information", "Account Information", and "Work Flow". The main content area is divided into "General" and "Assets" tabs. The "Assets" tab is active, showing a table with columns for "Billable", "Asset ID", "Register ID", "Type", "Reading", and "Usage". Below the table is a "Service Asset Information" dialog box. The dialog box contains the following fields: "Asset ID" (99999), "Asset Location (Rte/Seq)" (with a lookup icon highlighted by a red box), "Billable" (checked), "Additive / Multiplier" (1), "Allow Estimates" (unchecked), "Number of Dials" (5), "Previous Reading" (0.0000), "Reading" (0), "Usage" (empty), "Read On" (empty), and "Days this Reading" (empty). At the bottom of the dialog box are "Delete" and "Save" buttons.

You can select or add an asset location either by clicking on the lookup next to the Asset Location Route/Seq entry or, if there is a single asset location for a given route/seq combination associated with the location it will be possible to enter the route and sequence directly into the fields and it will select the appropriate asset location. If no such asset location exists or if there exist multiple asset locations on the account with that route/seq combination, then it will open the selection/maintenance dialog for the user to select or create the appropriate asset location.

Service Order Update - Service Info

General Info | Services | Fees | Comments | Inventory | Attachments

View | Edit

Service Order Information
2021 11236 - logicsadmin
Add Asset to Service
Printed - 9/14/2023 12:30 PM

Account Information
9506040.00 97
A & A CONSTRUCTION LLC
8103 N 55th Ln
McAllen, TX

Work Flow
Add Asset For WA
Enter Fees
Enter Update Info

Asset Location Maintenance

Add Asset Location

Account Number	Primary Svc	Route	Sequence	Description	Current Assets	Active Location
9506040.00		1	2		0	False
9506040.00	CS	109	123084		1	True

Cash Collections Build 320

New Features

N/A

Bugs

Item #	Subject	Description
595	Network Receipt Printer performance	Removed the connect to printer for every transaction to improve performance.
600	Warning on ACH batch	The new receipt header validation has found data inconsistencies that have been created for a while. When the totals in the receipt header do not match the individual tenders, it will not cause any issue with distribution or update.
601	Check list & batch totals not printing to receipt printer	Bug in CC_Payment.asp fixed for batch totals and check list.
612	Voided Transaction not showing up in Red	Correction made for void transactions not showing on CC Payment Edit List when there are no tenders on the receipt.

Financial Management Build 870

New Features

N/A

Bugs

Item #	Subject	Description
1082	Physical Inventory - Move bottom of box down to end of screen. - Box is drawn through last item	Changed the box dimensions so that it does not overwrite the grid being displayed.
1083	Physical Inventory - Print Batch - Add Option to Order By: Sequence Number	Added the option to sort the displayed grid by sequence number.
1231	Attachments that are not related to the specific Requisition are displayed	Do not display any requisition attachment records in the grid linked to an id -1. The message, 'Please save the requisition first before adding the attachment' will now be displayed if the requisition record has not been saved yet
1236	Slow rendering of PDF reports on new server	Made changes for the trial balance report to get the logo from the filesystem.
1243	Check Run batch number didn't increase correctly	A new field, RowID, was added to the CheckRun table to be used as the record identifier rather than the CheckRunId field.
1244	Server Error running Trial Balance	Changes were made in several reports to improve performance in how it was getting the logo from the phoenix images folder that prints at the header of the reports. This change was also made for the simple account structure Trial Balance report to prevent the server error.
1246	Allowing entries to previous fiscal years	<p>Changes to allow entries to previous fiscal years that are a rolled over status, rather than only prior fiscal year and current fiscal year.</p> <p>Changes to Rebuild YF to allow user to select a previous fiscal year that is rolled over status and bring balances forward to the following fiscal year.</p> <p>Option to lock down a previous fiscal year added under Tools on the Year End Processing page.</p> <p>Option to unlock down a previous fiscal year added under Tools on the Year End Processing page.</p>
1253	Amount In Stock added for inventory item custom reporting	An option for Amount In Stock has been added for the inventory item custom reporting.

Fixed Asset Management Build 651

New Features

N/A

Bugs

N/A

Revenue Management Build 621

New Features

N/A

Bugs

N/A

Utility Management Build 1834

New Features

Item #	Subject	Description
1654	Fields for tracking Service Line Materials	Provided a means of tracking service line material associated with the new asset location.
1734	Report to show same asset setup on 2 accounts	Created a report to show if an asset is setup on 2 different accounts include cases where it's the same account but a different asset location
1821	Asset Location	Added an "Asset Location" table to handle information now stored on the asset which is location related and should be location persistent such as: Route/Sequence Map ID Reading Instruction Code/Comment Meter Location Code/Comment Other fields of this type may be added here in the future
2060	Add a new service line report that includes customer information to be used for mailouts	Added an option to the standard Service line reports for EPA, TX, and LA to provide customer information that can be used to create a mail merge in Excel.
2118	Add Route & Seq as option in asset history grid	Changed view for the History grid to include route and sequence.

Bugs

Item #	Subject	Description
1644	Itron Temetra interface - Create Nightly Files and export csv file by reading type to separate radio read and manual reads	Created an interface for the Itron Temetra reading software to include a nightly reading file.
2003	Add Revenue Class Code to Asset Listing	Added /Revenue Class Code to the Asset listing report
2035	Custom Report using backflow Group BackFlow Fields	A new view has been added and an existing view used for custom reporting modified to be able to select the Commercial User, Swimming Pool, Irrigation System in custom reporting.
2045	Update unique service line ID	Changed to use the UniqueID rather than the NaturalID has been made to the Service Line Inventory report.
2057	Fix error after saving asset maintenance	Found the error in the compiled code and made the fix.
2058	Add attachment info to account & asset custom reports	Added attachment info to the custom reports for Accounts and Accounts with Assets.
2064	Option to select Cycle(s) added to Consumption Analysis By Rate report	The option to select Cycle(s) was added to the Consumption Analysis By Rate report.
2069	Usage Demand Report account name and service address not exporting to excel	Corrections have been made for the account name and service address to be included in the excel file.
2080	Improve performance in history grid query	Updated the stored procedure and indexes for account history.
2087	Days this Reading Calculation incorrect.	Changed so that if the Read On date is defaulted from a previous service order it will calculate the Days This Reading.
2100	Add Active flag to service.	Added an Active flag to the service table and show only the active services in the drop down.
2103	Fix Bill/Adj/Read batch grid performance with ShowAttachments	Updated the views to the grids to improve performance
2117	Add CYCLE to the Outstanding Service Orders report	The Cycle(s) option has been added to the Outstanding Service Orders report.

Item #	Subject	Description
2121	Cannot Add Transaction to Reading Batch	Fixed the issue that caused the added transactions not to be included in UBwReadingDetail because FK_UBAssetLocation was not populated by the Add Transaction interface.
2125	Fix error on Reading Seq update in Reading Update	Changed the logic that updates the reading sequence to the asset location. This only occurs if (a) the setting Readings → UpdateNewReadingSequenceToAsset is checked in the system configuration and also when there is a value in NewReadingSequence on the reading detail.
2127	Fix script sequencing issue	Changed the UBwReadingExport view.
2131	Error updating Add New Service SO	Added a check to ensure that the asset location is saved before allowing the SO to be updated.
2145	Fix Add Prev Asset History fails when previous read is null	Changed the code to allow saving from Add Previous Asset History when previous reading is null. Added block to SO update when missing readings to prevent null values being saved.
2146	Renummer Account function changes	This was caused by there being no services assets on account being renumbered, changed the code to set it to return empty.
2151	Fix Cutoff SO generation from delinquent fails	Fixed inline SQL code.
2154	Populate Asset Location in 3rd Party Reading Batches	Fixed code to properly populate the UBReadingDetail.FK_UBAssetLocation value.
2167	Fix asset location popup repeats on Add New Service	Made changes to system to allow the asset location to save properly.
2191	Error Assigning Route & Sequence Number to an Asset	Increased the precision of the stored procedure to handle 3 digit routes.
2194	Sales Ticket Batch not being brought into Billing Batch	Modified the stored procedure to get the asset location from the account and asset to fix asset history write.
2202	Renummering Account Error	Fixed the case where there are no assets/asset locations associated with the account being renumbered.
2209	Unable to print Backflow items	Corrected the Backflow Template view.
2210	Unable to export from reading batch	Fixed the script sequencing for UBwReadingExport variants

Online Bill Payment

New Features

Bugs

Item #	Subject	Description
297	Auto Pay set up on unlinked account	Unlinking a bill is blocked for bills: enrolled in auto pay with a scheduled payment with a payment in the cart An additional message will be displayed for each bill that cannot be unlinked.
298	Add Time to Receipt Message body	The date with time zone will be added to the OLBP receipts just below the Reference Number and Receipt Number

Logics Reports Build 389

Changes made to individual Reports are described in the associated product changes.