

# Creating Bill Codes

- **Step 1:** Review rates set up by city, by ordinance or resolution.
- **Step 2:** General Tab  
Billing/Collections > Utility/Tax Billing > Calculate Bills > Bill Code Maintenance

- **Step 3:** Add 3 Character Code  
Add

(in this example we will add code "WR1")

(options will vary on codes)

- **Step 4: Calculation Tab**

\*\*Rounding usage depends on how meter is read.

- **Step 5: Receivables/Refund Tab**

\*\* This revenue account is where they want the billing to go when paid.

- **Step 6 (optional): Rate Table Tab – based on calc type of bill code**

	Minimum	Allowance	Rate	Factor
1.	.00	.00	.000000	.00
2.	.00	.00	.000000	.00
3.	.00	.00	.000000	.00
4.	.00	.00	.000000	.00
5.	.00	.00	.000000	.00
6.	.00	.00	.000000	.00
7.	.00	.00	.000000	.00
8.	.00	.00	.000000	.00
9.	.00	.00	.000000	.00
10.	.00	.00	.000000	.00

Minimum is the balance before use, the allowance is what is allowed for the rate, and the factor is how the use is billed (10's, 100's, or 1,000's is what is common)

# Meter Reading Adjustment

- **Step 1:** Open Utility Account

Billing/Collections > Utility/Property Tax Billing > Utility Accounts > Account Maintenance

Select Account meter reading is incorrect (this example we will use Donald Duck)

- **Step 2:** Review Meter Reading from Detail Tab

OK

Account Id	Location	Units Code	Year	Prd	Date	Type	Est	Readings	Usage	Excess	Roll	Ref
Type	Section Name						Flag			Usage	Flag	Num
	Cycle	METER NUM	Mult	Size	Book	Page						
	Bill Group	City Id										
76-1	123 FANTASYLAND DR		1.00	IRI	Irrigation	Standard Meter:		1 Meter Group: 1	Status: Read			
RS	EUI	DUCK, DONALD D		1.00	ITX	METER NUM: 1850101750		Serial Num: 52812064				
Irrigatio	3	1850101750		10	7	0331 06960						
				2021	9	09/08/21	S	773070	15460	15460.00		41920
				2021	8	08/06/21	S	757610	6840	6840.00		41453
				2021	7	07/08/21	S	750770	3770	3770.00		41011

\*\*in this example there was a high use this past billing and Donald Duck stated he though his meter was wrong – once the meter was checked he was correct and it was mis-read, meter show the reading was 763070, we need to correct the reading.

- **Step 3:** Open Meter Reading Adjustment Routine

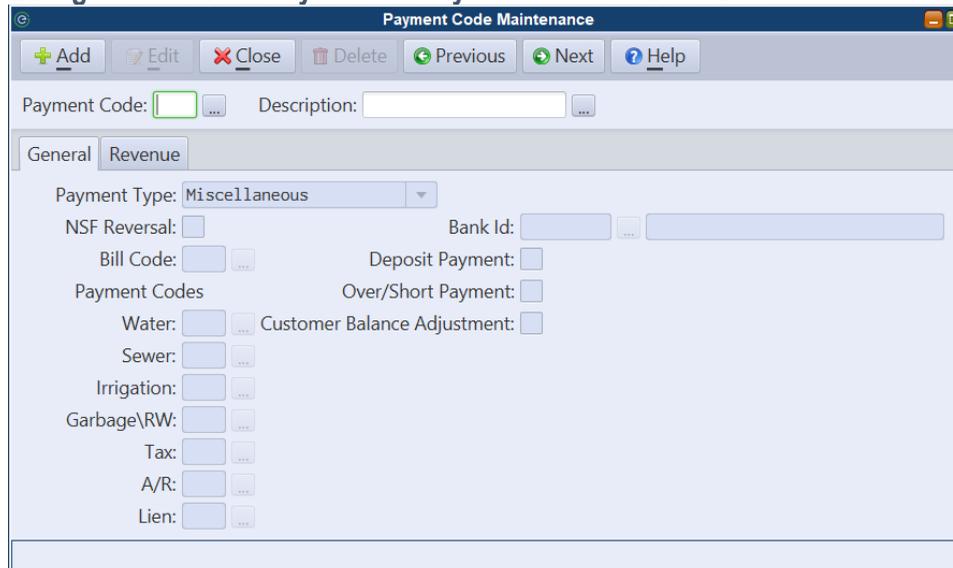
**Billing/Collections > Utility/Property Tax Billing > Meter Reading > Meter Reading Adjustment Routine**

Select service Type (Irrigation) Account Id, Meter seq, and Reading Type  
 Click Edit and Change Reading  
 Save

# Creating Pay Codes

- **Step 1:** General Tab

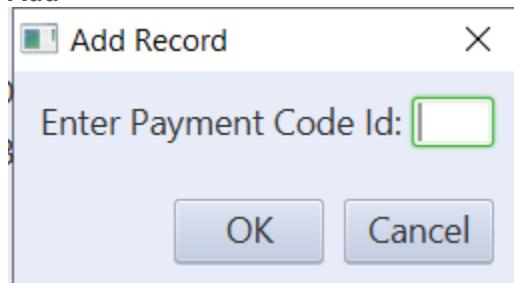
Billing/Collections > Payments > Payment Code Maintenance



The screenshot shows the 'Payment Code Maintenance' window with the 'General' tab selected. The 'Payment Type' is set to 'Miscellaneous'. There are several checkboxes for 'NSF Reversal', 'Deposit Payment', 'Over/Short Payment', 'Customer Balance Adjustment', 'Water', 'Sewer', 'Irrigation', 'Garbage\RW', 'Tax', 'A/R', and 'Lien'. Each checkbox has a corresponding text input field with a dropdown arrow.

- **Step 2:** Add 3 Character Code

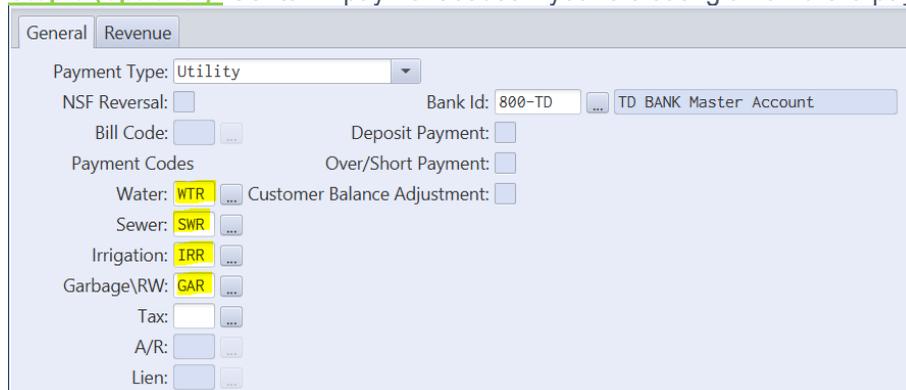
Add



The screenshot shows a dialog box titled 'Add Record' with a close button (X). It contains a text input field labeled 'Enter Payment Code Id:' and two buttons: 'OK' and 'Cancel'.

(in this example we will add code "UT1" a utility umbrella code)

- **Step 3 (optional):** Center in payment codes if you're creating an umbrella payment code



The screenshot shows the 'Payment Code Maintenance' window with the 'General' tab selected. The 'Payment Type' is set to 'Utility'. The 'Bank Id' is set to '800-TD' and the 'Bank Name' is 'TD BANK Master Account'. The 'Water' checkbox is checked and the text input field contains 'WTR'. The 'Sewer' checkbox is checked and the text input field contains 'SWR'. The 'Irrigation' checkbox is checked and the text input field contains 'IRR'. The 'Garbage\RW' checkbox is checked and the text input field contains 'GAR'.

\*\*Options will vary on Payment Types.

- **Step 4: Enter Revenue Codes**

General Revenue

Source Id: [ ] [ ]

Charge Accounts:

2021 Billing: Revenue [ ]  Prompt for Account in Payment Window

[ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ]

2020 Billing: [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ]

Future Year Billing: [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ]

Arrears: [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ]

Interest: Revenue [ ]

[ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ]

Overpay/Deposit: [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ]

\*\*Because this is a umbrella code, we will need to review the Primary Payment Codes from General Tab, in this example we will review payment code "WTR"

Payment Code Maintenance

+ Add Edit Close Delete Previous Next Help

Payment Code: WTR Description: Water

General Revenue

Payment Type: Water

NSF Reversal:  Bank Id: 800-TD TD BANK Master Account

Bill Code: [ ] Deposit Payment:

Payment Codes Over/Short Payment:

Water:  Customer Balance Adjustment:

Sewer: [ ]

Irrigation: [ ]

Garbage\RW: [ ]

Tax: [ ]

A/R: [ ]

Lien: [ ]

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Payment Code Maintenance

+ Add Edit Close Delete Previous Next Help

Payment Code: WTR Description: Water

General Revenue

Source Id: UTILITY

Charge Accounts:

2021 Billing: Revenue  Prompt for Account in Payment Window

1-040-0000-340-30-10 WATER UTILITY REVENUE / WATER SALES

2020 Billing: 1-040-0000-340-30-10 WATER UTILITY REVENUE / WATER SALES

Future Year Billing: 1-040-0000-340-30-10 WATER UTILITY REVENUE / WATER SALES

Arrears: 1-040-0000-340-30-10 WATER UTILITY REVENUE / WATER SALES

Interest: Revenue

1-040-0000-340-30-10 WATER UTILITY REVENUE / WATER SALES

Overpay/Deposit: X-040-0000-219-10-00 CUSTOMER OVERPAYMENTS- UTILITY

# Replacing Meters

- **Step 1:** Open Utility Account  
**Billing/Collections > Utility/Property Tax Billing > Utility Accounts > Account Maintenance**

Utility Account Maintenance

Account Id: 281 - 0 Type: RS Section: EUI

Prop Loc: 456 LIBERTY SQUARE Location Id: 260

Serv Loc: 456 LIBERTY SQUARE Primary Property:

City Id: PID:

Owner: WHITE, SNOW

Bill To: WHITE, SNOW

Alternate Id:

General Additional Water Sewer W/S Meter Irrigation Irrigation Meter Garbage/RW Garbage/RW Meter Balances Recent Activity Credit History Location Accounts

Bill To

Street 1: 456 LIBERTY SQUARE

Street 2:

City/St/Zip: ORLANDO, FL 32726-5340

Phone: (407)939-5277 Cell: ( ) -

Email: SNOW.WHITE@GMAIL.COM E-Bill:

Owner

Street 1: 456 LIBERTY SQUARE

Street 2:

City/St/Zip: ORLANDO, FL 32726-5340

Country:

Phone: (407)939-5277 Cell: ( ) -

Email: SNOW.WHITE@GMAIL.COM E-Bill:

Bank Code:

Priority Service:

User Msgs:

Municipal Lien: CO Date: Do Not Disconnect:

Outside Lien: Bankruptcy: Tenant Occupied:

Assignment: Bankruptcy Date: Landlord Account:

Sp Charges: WIPP PIN: 2549 Do Not Print Delinquent Notice:

Exclude from Tax Sale: Online Payment Restrictions: None

Service Types

	Status	Active Date	Inactive Date
Water:	Active	12/11/1996	
Sewer:	None		
Irrigation:	None		
Garbage/RW:	Active	12/11/1996	

Print Bill

Recalculate Bill

Edit Location Id

Create Work Order

Calculate Final Bill Adjustment

Select Account meter is being replaced/exchanged on (this example we will use Snow White)

- **Step 2:** Select W/S Meter Tab (this may be labeled differently on your system)

Utility Account Maintenance

Account Id: 281 - 0 Type: RS Section: EUI

Prop Loc: 456 LIBERTY SQUARE Location Id: 260

Serv Loc: 456 LIBERTY SQUARE Primary Property:

City Id: PID:

Owner: WHITE, SNOW

Bill To: WHITE, SNOW

Alternate Id:

General Additional Water Sewer W/S Meter Irrigation Irrigation Meter Garbage/RW Garbage/RW Meter Balances Recent Activity Credit History Location Accounts

Meter Backflow

Add Meter METER NUM: Serial Num: Book/Page:

Meter 2

Meter Type: Standard Meter Group: 1 Serial Num: 76364844

METER NUM: 1564454784 # Dials: 7 Badger/MVRS:

Book: 0223 Page: 03200 Multiplier: 10 Sensus MXU:

Location: 99 LOF DRV ROF TREE Read Resolution:

Service Point Id: W1 Decode Type: 0

Gun Type: Tamper Code:

Gun Rdg Type: Radio Install Date: 10/29/2019 Replaced Meter: 1 Replace Meter

Status: Read Install Date 2: Meter Description: MAKE E SIZE 3/4 Delete Meter

Status Date: Pipe Size: .000 View Map

Status Reason: Footage: .00 Latitude: .000000

Longitude: .000000

(You should have received the final meter reading and the new meter information for this account.)

- **Step 3:** “Replace Meter” Button

Replace Meter

Old Meter

Meter Seq: 2 Meter Group: 1

METER NUM: 1564454704

Serial Num: 76364844

Interim Read:   Rollover

New Meter

METER NUM:

Serial Num:

Mult: 10

# Dials: 7

Gun Type:

Gun Rdg Type: Radio

Sensus MXU:

Badger/MVRS:

Reset Read:

Year: 2021 Period: 10

Reading Date: 09/17/2021

Reason:

Save Cancel

**Interim Read:** The Final Read for the Old Meter

**Year/Period:** This will default to the next unbilled period

(Fill in information that was given to you to replace/exchange the meter, and save.)