Utility Billing 4.2.5 Release Notes

This update should be run on each workstation on which you use the Utility Billing system. If your town has a separate server computer on which the system's data is maintained but the client application is not installed (i.e. you don't sit down at the server to view or edit data) then you do not need to run this update on your server machine. However, be sure to update every machine from which you view or edit data.

Fixes:

Commitment Summary Report

The Quarterly label on the Commitment Summary Report was relabeled to Flat.

Updates & New Features:

Report Menu Changes

We have condensed List By Owner, List By PID, and List By Street reports into the Water File List report. Note that this change does not eliminate any features that were provided in these reports. The Water File List report displays the same information and in the same manner that you are accustomed to, but it is more robust with the use of filters. Filters provide the ability to extract a report to match your specific criteria. We have also added two new report selections called Post-Its and System Billing & Usage. We recommend that you look over the Reports menu items to familiarize yourself with the changes.

Custom PID Format

We have added the possibility of configuring your system to display PIDs in a manner different from the standard six character map, six character lot, and six character sublot. This is in response to the growing number of communities (predominantly towns that have had a remapping/renumbering project by Cartographic Associates) that have PIDs that do not conform to this standard. Previously, this could be accommodated within the existing 18 character PID framework but it was not always clean.

The new Custom PID function allows you to configure a PID mask that divides the 18 available characters up into as many as six distinct sections of any length (e.g. six sections of three characters or one section of ten characters and another of eight characters). Additionally, you can choose to indicate a character that will separate each section and/or you can choose to suppress leading zeros from each section.

Note that this function should only be enabled in consultation with Avitar Software Support and in conjunction with your Assessing department. However, review the description below and please contact us if you and your assessors are interested in implementing a Custom PID format.

By using the Custom PID Format option, you can choose to change the system format to an eighteen character PID in a manner different from the standard six character map, six character lot, and six character sublot format. For example, you could elect to choose six characters for the map, three for the lot, three for the sublot, three for a building number, and three for a unit number.

> *Custom PID Mask* -- You must use the # symbol to indicate the placement of the individual PID characters within the mask. Then use another character (for example a space or a dash or a slash) to indicate the character you wish to use to separate the component sections of the PID. However, you can only use one character as the separator character.
>
> *Custom PID Description* -- Enter a brief description of the entire PID (e.g. "Map/Lot/Sub/Bld/Unit"). This is the label that will appear on reports. It is best to use a capital letter for the first letter of each component and then lower-case letters for the rest. This will match the format of the rest of the program and the report heading will look consistent.
>
> *Custom PID Section Names* -- You can choose to enter a description for each component of the PID (e.g. "Map", "Lot", etc.). The Custom PID Section names are only visible when you hover over the individual boxes throughout the program used to enter PID values on which to search.
>
> *Suppress Leading Zeros* -- Check this box to suppress the leading zeros in each section of the customized PID (e.g. "1/2/3" instead of "000001/000002/000003").
>
> *Pad Separators with Spaces* -- Check this option to add a space before and after each separator, making it easier to read in some instances (e.g. "1 / 2 / 3" instead of "1/2/3").

Post-It Notes

The system now provides Post-It functionality whereby you can add notes or reminders to specific accounts. This feature includes the following capabilities:

- The ability to add unlimited Post-It Notes to an account.
- The ability to add a reminder date to a Post-It Note.
- The ability to delete Post-It Notes when they are no longer applicable.
- Easy identification of accounts with Post-It notes by way of an icon on the main screen.
- New Post-It Note Report that includes PID/Account, Current Owner, Creator, Flash Option, Note and Reminder Date.

To create a Post-It, display the appropriate account in the main screen and select Utilities | Add Post-It. The Post-It dialog box allows you to view, add, edit, delete or enter reminder dates on

Post-It Notes. Within the Post-It dialog box you have several options. Use the yellow text box to enter the actual information. If you wish to be reminded by the system about the Post-It at a specific point of time in the future, check the Set Reminder check box and then use the Reminder Date to indicate the date. For example, you might use the Reminder option to alert you of an upcoming meter change for an account. Additionally, if you wish to be explicitly reminded of the Post-It whenever the account is displayed on the screen check the Flash This Message check box. For example, you might use the Flash option to add a Post-It to remind you that the customer was confrontational the last time they were in your office. You can add multiple Post-Its to a single account by pressing the New button.

If a Post-It exists for a displayed account, the Post-It icon will appear as a small yellow piece of paper. To access an existing Post-It, simply press the Post-It icon. The system will automatically display Post-Its that were created with the Flash This Message option. When a Flash Post-It is displayed you can press the Don't Remind Me button once you have acknowledged the Post-It. Note that this only lasts through the remainder of your current login session. It will continue to Flash in subsequent sessions until you either delete the Post-It or remove the Flash option. To delete a Post-It, simply press the Delete button within the Post-It dialog box.

If you have Post-Its for which the Reminder option has been set for a specific date, you will be prompted to review them after login.

The Post-It Note report can be found by selecting Reports | Post-Its. Here you can sort the report by PID/Account, Creator, Creation Date, and Reminder Date. You can also limit the report to display only Post-Its by creator. The report will display on the screen for you to view and/or print.

Fix Button

The Fix function makes it easier for you to update previous and current meter reading amounts in a single place when your meter reader comes back with readings that don't match what you had on file. You can now change the meter reading date in addition to the previous and current reading amounts.

Water File List Report

You now have the ability to sort and filter accounts that appear on the Water File List report. You can sort the report by Owner, PID, Street, Usage, Meter Number, District, Route, and Meter Reading. You can also limit the scope of the report to display the current record set or the prior bill.

The default scope is "All Records". This option returns all the records in the database that match the selection criteria. We have added the ability to filter the report by Route, Meter Make, Meter Size, Water Bill Type, Water Rate, Sewer Bill Type, Sewer Rate, and the Assessing Update Option. (The Assessing Update Option allows the account's owner information to be updated based on future changes made within the assessing database. Typically this option should be checked unless you have a situation, such as a landlord/tenant scenarion, in which the utility bill is to be sent to someone other than the parcel's owner.)

You can also choose from three report formats:

* The "Standard" report format just displays Owner Name, PID, and Location.
* The "Expanded" report format adds Owner Address as well as detailed account, meter, and billing information.
* If you are using the Custom Meter option, the "Expanded With Custom Meter Information" report format displays the values exported to an automated meter reader.

System Billing & Usage Report

We have added a System Billing & Usage report for the utility department that wishes to track system-wide usage and billing amounts from previous billing cycles. The report presents the information in bar chart format. The System Billing & Usage report can be found by selecting Reports | System Billing & Usage. If you bill customers using only flat fees, the display of the Usage Bar Chart can be suppressed. To suppress this option, select Utilities | Town Information. Under the Rates, Billing & Taxes heading, click the check box labeled Suppress Usage Chart on History Report and click Apply Changes.

Print Billing History

We have added two new bar charts to the Print Billing History feature. One bar chart prints usage and the other bar chart prints billing amounts from previous billing cycles. The Usage Bar chart is also suppressed when Suppress Usage Chart on History Report option is selected (see System Billing & Usage Report.) This new feature can serve as a visual aid to assist in water leakage disputes or when you need to estimate a usage amount.

Report of Imported Owner/Address Changes

You will now be prompted if you wish to generate a report listing accounts for which owner/address information was changed following the Get Assessing Owners function. If you wish to see this report, you must print it when prompted as the list of accounts that were updated is discarded after the process is complete.

Unread Billing Accounts Report/Check Readings Report

We have added route information to both the Unread Billing Accounts report and the Check Readings report.

Calculate Bills

Previously, the system always set the bill due date to the current date in the calculate bill function. The system will now set the bill due date to the current date on the first attempt to calculate bills. Each subsequent attempt to calculate bills will use the date used from the prior attempt.

Billing Notes

We have added the capability to print a billing note for an account on the Utility Bill. To add a note select the Edit button and enter the note in the field labeled Billing Notes. If you print Utility Bills from our Tax Collect software, this feature will be available in the next release of Tax Collect. To turn on this feature, please call Avitar support.