Adding a Template

Description

Bill Templates are commodity-specific forms that define a layout and sequence for entering utility bill information. Once they are created, templates can be assigned to accounts/meters, allowing associated billing and/or consumption information to be entered. Bill Templates allow customization to the appearance of the bill entry interface to closely match the billing information provided by the vendor for each account/meter. Templates ensure that bill entry personnel are capturing all desired billing data including use and cost.

This topic will...

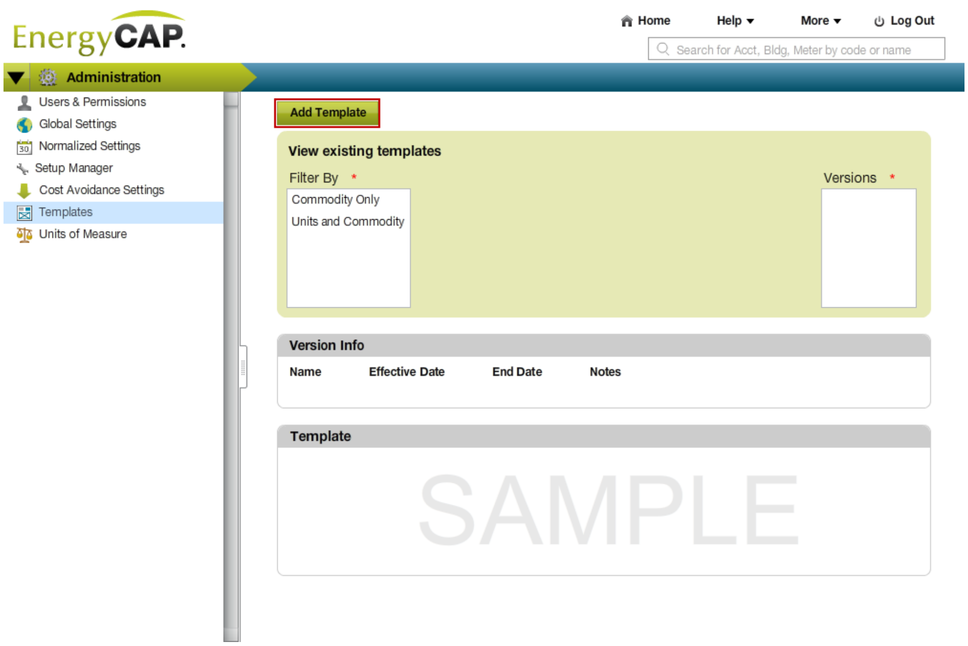
- describe the process for adding a template.

Prerequisites

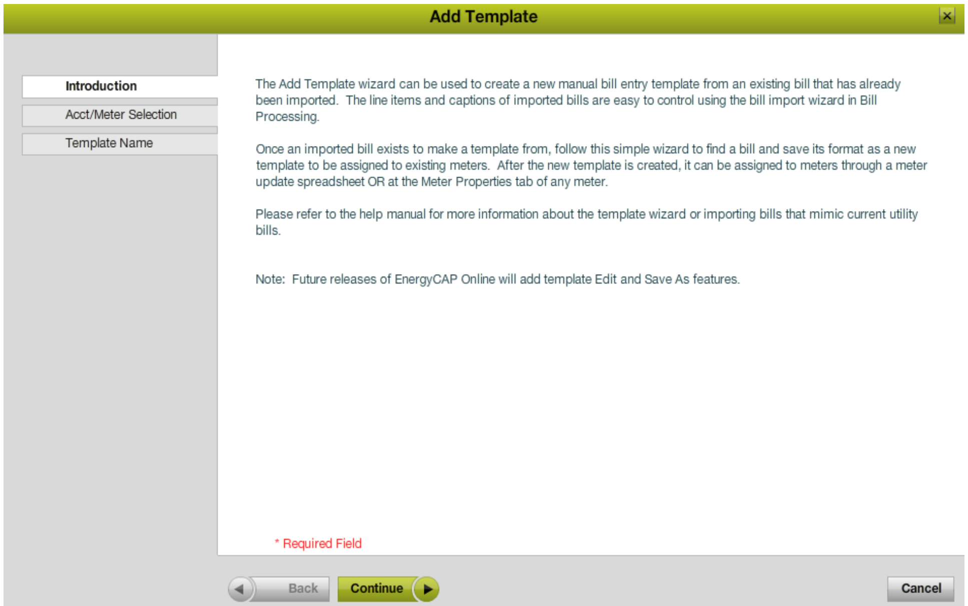
- The ability to add template requires permissions associated with the following User Roles:
  - Administration Full Access
- Import a bill in the exact layout needed for the template

Step-by-Step

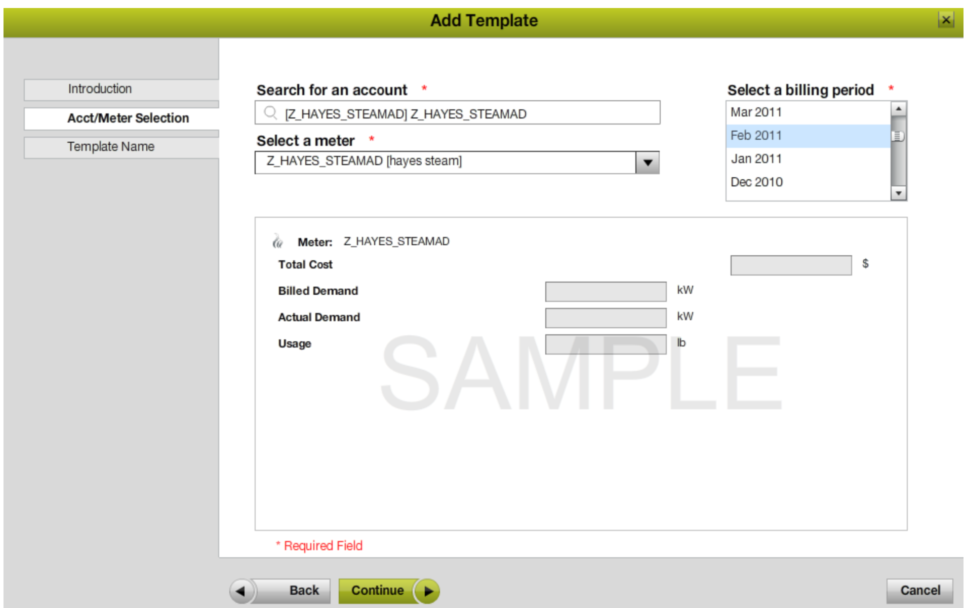
1. Navigate to the Administration section in one of two ways:
   - Select **Administration** from the Main Menu, OR
   - Click **Admin** under the More page header options.
2. Select the **Templates** node from the tree.
3. Click the **Add Template** button.



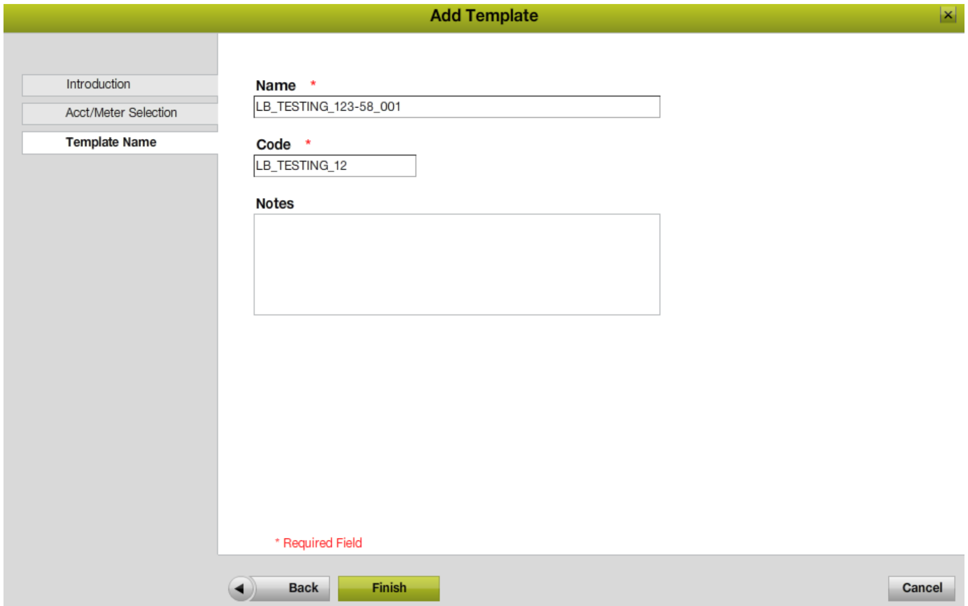
4. On the **Introduction** tab, read the template overview information. When done, click **Continue.**



5. On the **Acct/Meter Selection** tab, locate the meter bill to be copied and then click **Continue.**
    a. The **Search for an Account** field, locates the account the bill to be copied is attached to.
    b. The **Select a Meter** field will displayed all the meters attached to the account selected.
    c. Once the meter has been selected, the last 24 bills will be listed in the **Select a Billing Period** field.
    d. The exact layout to be saved will be displayed in the **Sample** box below the fields.



6. On the **Template Name** tab, input and edit the data as needed and then click **Finish.**



7. Once the template is saved, it must be assigned to a meter before it will be used during manual bill entry of a bill. Assigning a template can be done in one of two ways.
    - Individually through the Meter Properties page
    - Through a mass update, using the Setup Manager, Meter Update spreadsheet.

Rules & Restrictions

- The default start date for the template is 1/1/1980.
- Only one version of a template can be created at this time.
- A template can not be deleted.
- Only active accounts show up in the account search.
- Only active meters that have a rate and template attached will show up in the meter field.

Additional Information

- The name and code for the template will default to the following format if there are enough characters:
  UNIT_VENDORCODE_RATECODE_SEQNUM
  This can be changed if desired.