



Edifice Pro-rating Customer Bills Process

Below are instructions for generating pro-rated customer bills when your utility has a rate change that occurs in the middle of a billing cycle.

Edifice Pro-rate Billing Overview

Each of the steps outlined below are explained in greater detail on the following pages.

Before Starting the Pro-rated Billing

Important: Pro-rating an individual customer's service that was *started or stopped* in the middle of the billing period is a different type of pro-rating and the system handles this in a different method. For directions to enter this type of bill, see *Bill Entry – Entering Special Bills in the WebHelp*.

All customers who should be billed entirely at the old rates must be billed before starting the pro-rating process.

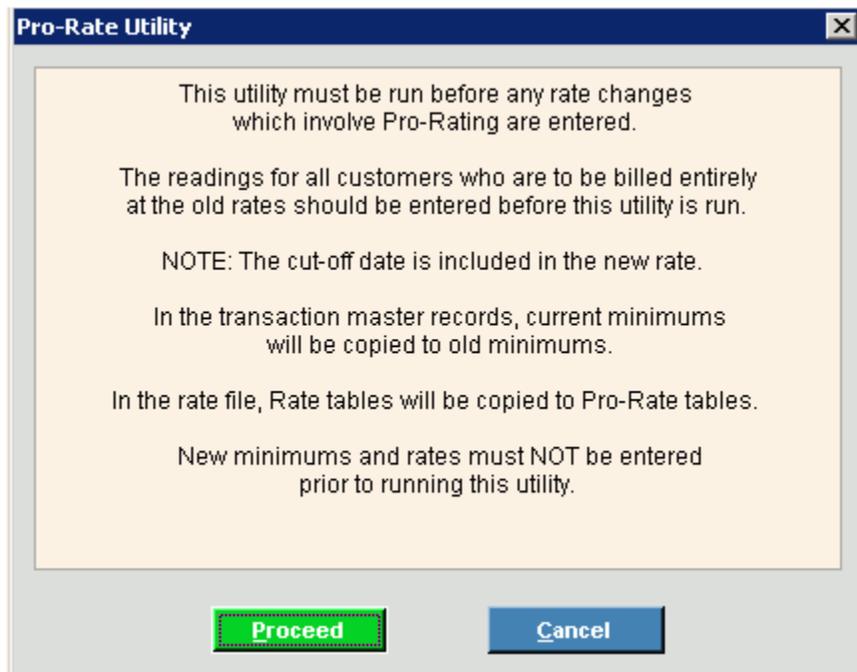
1. Run the Pro-Ration Utility.
2. Go to Rate Table Maintenance and enter the new rates in the Rate Tables. Or, use the Rate Modeling utility to create the new values in the Rate Tables.
3. Go to Transaction Code Maintenance and enter the new Minimum Charge and Minimum Usage values for the appropriate Transaction Codes.
Note: When editing, verify that the Old Minimum Charge and the Old Minimum Usage fields contain the prior rates.
4. Enter bills.
 - a. If you enter bills manually through Bill Entry, enter the following at the Billing Run Code prompts:
 - i. **Prorate Bills – select Yes.** This lets the system know that bills are pro-rated.
 - ii. **Cut Off Date** - Enter the date the new rate begins. The Cut Off Date is included in the new rate.
 - b. If you import readings, you will need to indicate that the readings are for pro-rated bills. You will do this during the Convert step, by clicking  at the Meter Dates field to open Meter Import Dates screen. Then, enter the **Prorate Date** as the date the new rate begins.
5. Perform the rest of your billing cycle as you normally would.
Note: Be sure to proof the Edit Journal to verify that the bills are calculated correctly.



Step 1. Run Pro-ration Utility

Use the Pro-Ration Utility to create the records necessary for utility rate changes that involve pro-rating. The Pro-ration Utility will copy each rate table and Transaction code to a corresponding pro-rate table and prorate Transaction code. In addition, the Transaction codes will be updated by copying the Minimum Charge and the Minimum Usage values to the Old Minimum Charge and the Old Minimum Usage fields.

Go to **Utilities** → **Pro-ration Utility**. The following screen displays.



Click **Proceed** to begin.



Step 2. Edit Rate Tables

After you have run the Pro-Ration Utility the new billing rates need to be entered. This can be done in Rate Tables Maintenance or you can run the Model-Ration Utility if you have set up model-ration tables.

Go to **Daily Work** → **File Maintenance** → **Code Maintenance** → **Rate Table**. The following screen displays.

Rate ID: 001

Save Search Retrieve

Title: RATE TABLE

Description:

	Usage Level	Rate		Usage Level	Rate
Row 1:	0	0.0423900	Row 13:	0	0.0000000
Row 2:	0	0.0000000	Row 14:	0	0.0000000
Row 3:	0	0.0000000	Row 15:	0	0.0000000
Row 4:	0	0.0000000	Row 16:	0	0.0000000
Row 5:	0	0.0000000	Row 17:	0	0.0000000
Row 6:	0	0.0000000	Row 18:	0	0.0000000
Row 7:	0	0.0000000	Row 19:	0	0.0000000
Row 8:	0	0.0000000	Row 20:	0	0.0000000
Row 9:	0	0.0000000	Row 21:	0	0.0000000
Row 10:	0	0.0000000	Row 22:	0	0.0000000
Row 11:	0	0.0000000	Row 23:	0	0.0000000
Row 12:	0	0.0000000	Row 24:	0	0.0000000

1. Call up each rate table to be edited by entering the Rate ID and then clicking **Retrieve** .
2. Enter the new usage rate or rates.
3. Click **Save**  to save your work.
4. Repeat for each rate table that needs to be edited.



Step 3. Edit Transaction Codes

Update the appropriate transaction codes with the new minimum charge and minimum usage, if applicable.

Note: Please verify that the previous charge and usage is now in the Old Minimum Charge field and Old Minimum Usage field for the appropriate transaction codes.

Go to **Daily Work** → **File Maintenance** → **Code Maintenance** → **Transaction Code Maintenance**.

1. Enter the Transaction code and click **Retrieve** .
2. Enter the Minimum Charge and the Minimum Usage, if applicable.
3. Verify that the
 - a. **Minimum Charge** was copied to **Old Minimum Charge**
 - b. **Minimum Usage** was copied to **Old Minimum Usage**
4. Click **Save**  to save your changes.
5. Repeat these steps for all transactions codes that should be updated.



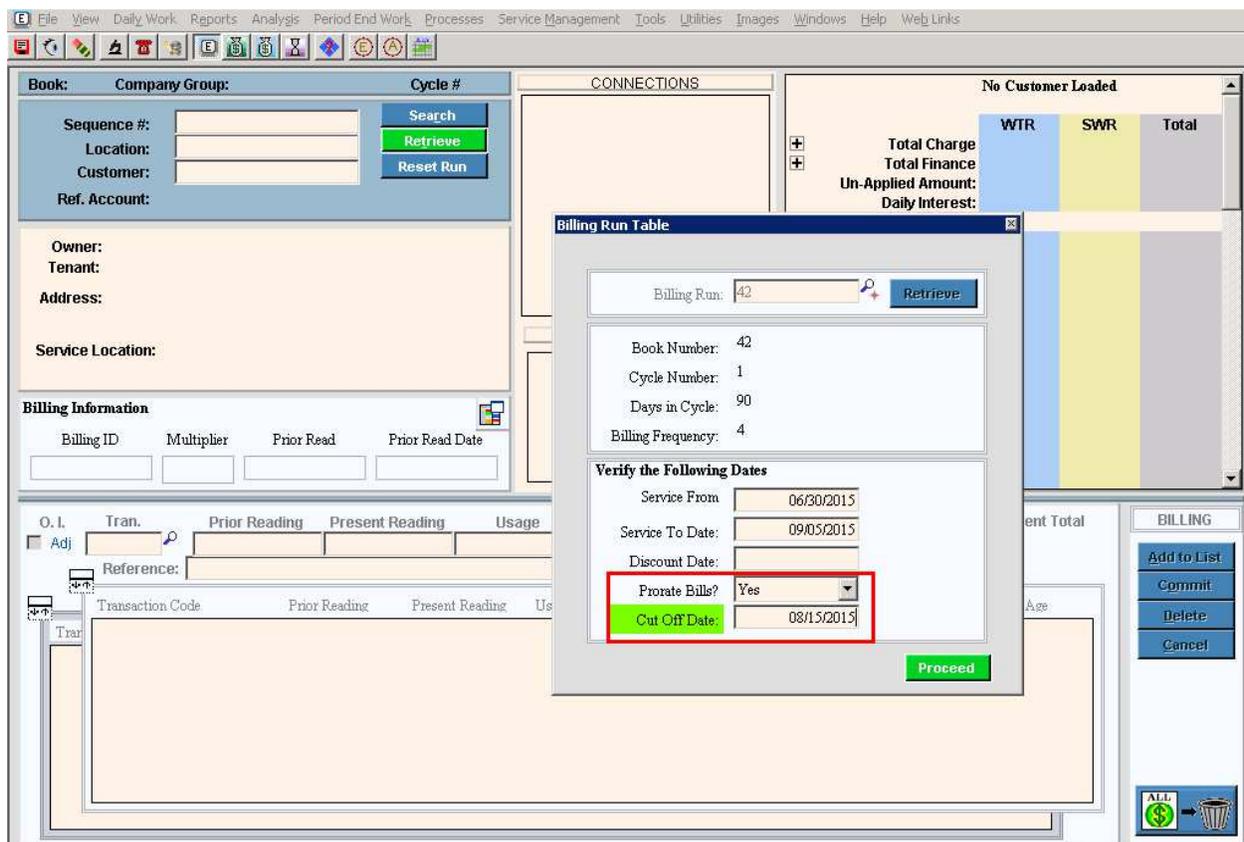
Step 4. Enter Bills

You are now ready to enter bills and import meter readings.

Entering Manual Bills

If you enter bills manually using Bill Entry, you will need to set the Prorate Bills option and enter a pro-rate Date (also known as the Cut-off Date) to indicate this billing cycle is pro-rated.

Go to **Daily Work** → **Bill Entry**. The following screen displays.



1. Enter the Billing Run code and click **Retrieve** .
2. At the prompt, **Prorate Bills?** Select **Yes**. This lets the system know that the bills are pro-rated.
3. Enter the **Cut Off Date**. This is the date the new billing rates begin and the Cut-off Date is included in the billing rate period.
4. Click **Proceed** .
5. Enter the customer bills as you normally would.

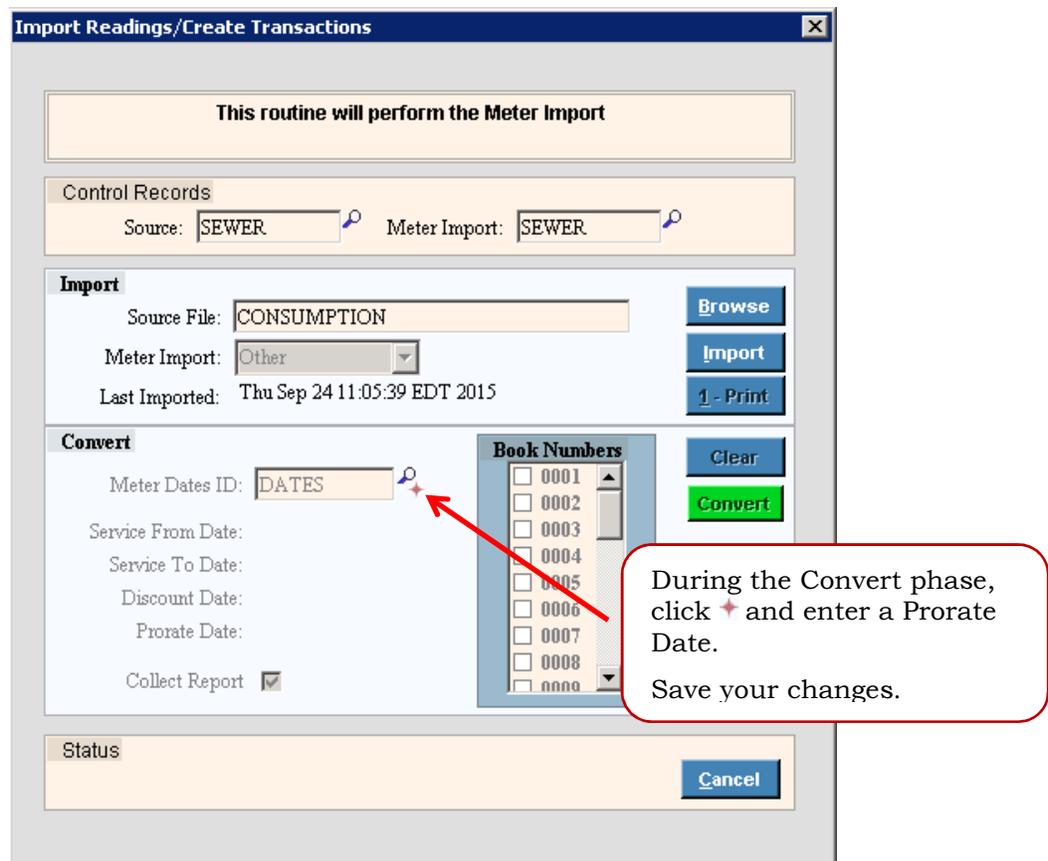


Importing Readings

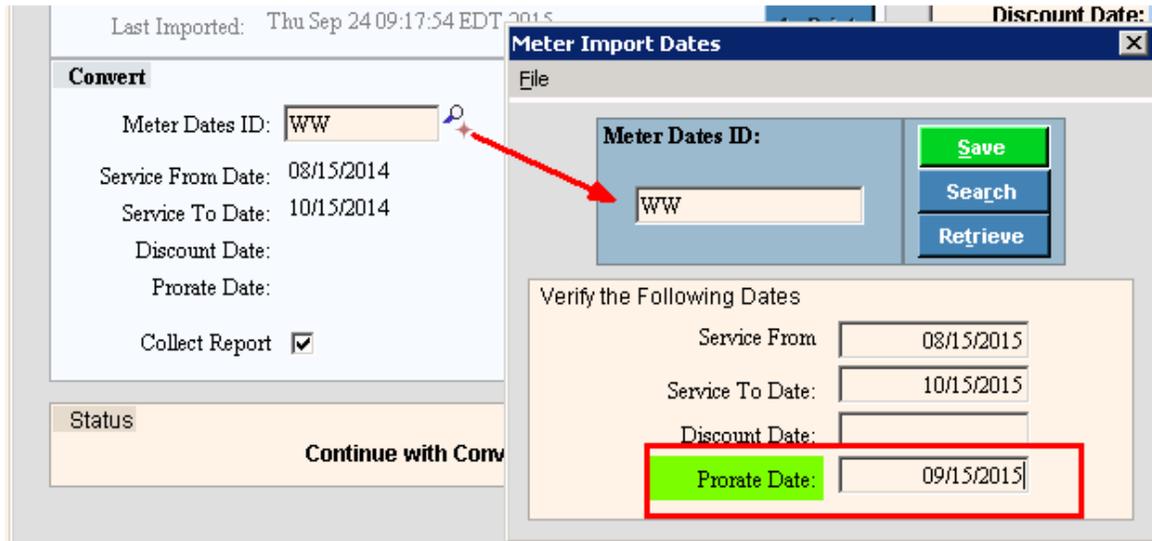
If you Import meter readings, you will need indicate that the readings are for pro-rated bills. Do the following so that the system can generate the correctly pro-rated charges. During the Convert step, edit the Meter Import Dates and enter the date the new rate begins as the Prorate Date.

Note: If you are importing multiple files during this billing cycle you will need to verify that there is a Prorate date until the Service From date is after the Prorate date. For example, if the Cut-off Date is 9/15/15, you will need to enter a cut off date for each billing until the Service From Date for the billing period is after 09/15/15.

Go to **Daily Work → Billing → Meter Communications → Import Readings/Create Transactions**. The following screen displays.



1. Select the **Source** for the import. The Source information displays.
2. Verify the Source file name.
3. Click **Import** .
4. After the import phase completes, you are ready to do the convert step.
5. Click **+ Fast Access Maintenance** at the Meter Dates ID to open the Meter Dates screen.



6. Enter the **Prorate Date** for generating these billing transactions.
Note: Remember the Prorate Date is included in the new billing rate.
7. Click **Save** to save the prorate date.
8. Click **Convert**  to finish the Import routine.
9. Continue the Import to complete the process.

Step 5. Finish the Billing Cycle

Finish your billing cycle as you normally would.

Note: Be sure to proof the Edit journal to verify the bills are correct.