

Meter Management

Modify Existing Meters

Utility Management > Meters > Modify Existing Meters = meter inventory

Several numbers associated with meters can be tracked depending on what is needed for Electronic Reading – each setup can vary greatly.

1. **Meter ID** – the main identifier of the meter. It can be the serial number, register number or electronic read number depending on the electronic reading interface
2. **Other ID** – usually the serial number if NOT in the Meter ID field but can be any other number that needs to be tracked
3. **EMR ID** – communication ID for some electronic reading interfaces that is usually used in conjunction with the **EMR Code**
4. **MXU ID** – communication ID for some electronic reading interfaces that is usually used in conjunction with the **MXU Type**
5. **Multiplier** – the number you must multiply the meter reading usage by to get the actual customer consumption
6. **Registers** – the number of readings that are coming from each meter. Water meters and non-TOU residential and commercial ELECTRIC meters have one register. Demand and Time of Use meters can have multiple registers
 - a. **Type** – tells the system what information is coming from the meter
 - i. Reading – the register reading, most used
 - ii. Quantity – the usage
 - iii. Demand Used – demand reading (non-TOU)
 - iv. Demand On-Peak – on peak demand reading
 - v. Demand Off-Peak – off peak demand reading
 - vi. kVAR Reading – register reading for kVAR
 - vii. kVAR Usage – usage for kVAR
 - b. **Dials** – used to determine when a meter has rolled over

Standard Water or Electric Meter:

Registers

	Type	Title	Dials	Code
Register 1:	Reading	Reading	4	
Register 2:	None		0	
Register 3:	None		0	
Register 4:	None		0	
Register 5:	None		0	
Register 6:	None		0	

Time of Use (TOU) Electric Meter (No Demand):

Registers

	Type	Title	Dials	Code
Register 1:	Reading	kWH On-Peak	5	
Register 2:	Reading	kWH Off-Peak	0	
Register 3:	None		0	
Register 4:	None		0	
Register 5:	None		0	
Register 6:	None		0	

Demand Meter for AMI Setup:

Registers

	Type	Title	Dials	Code
Register 1:	Reading	Reading	5	
Register 2:	Reading	Not Used	0	
Register 3:	Demand Used	Demand Used	0	
Register 4:	None		0	
Register 5:	None		0	
Register 6:	None		0	

Time of Use (TOU) Demand Meter – Usage:

Registers

	Type	Title	Dials	Code
Register 1:	Quantity ▾	kWH On Peak	7	
Register 2:	Quantity ▾	kWH Off Peak	0	
Register 3:	Demand On-Peak ▾	Demand On-Peak	0	
Register 4:	Demand Off-Peak ▾	Demand Off-Peak	0	
Register 5:	None ▾		0	
Register 6:	None ▾		0	

7. **User Defined Fields** – in the Meter table these are used mainly for additional information the AMI or MDM software needs. Every setup can be different depending on the vendor needs.

Meter Activity

Utility Management > Organization > Action Codes

- Action codes are the foundation of activity in Connect and control multiple functions from the background such as which fields appear in Enter Meter Activity (see Enter Meter Activity section)
 - Meter Activity tab allows you to choose which fields you'd like to see on the Enter Meter Activity tab including any User Defined fields
 - Check Copy from old meter on the far left side column in order to bring forward the information in that field from the old meter onto the new meter
 - Note: if using Service Orders, the fields here should match on the Service Orders tab to ensure smooth completion of Service Orders

Caselle Connect® > Utility Management > Organization > Action Codes

Caselle Connect® Customer Inquiry Action Codes

Action code: Action code 13 of 34

Action code: Electric Replace Reading

Action Code Meter Activity Service Orders Notes

Additional Meter Fields

- Read route
- Read sequence
- Meter location

☒ Display only
☐ Require a value

Additional New Meter Fields

- Read route
- Read sequence
- Meter size
- Multiplier
- Meter location
- EMR code
- EMR ID

☐ Display only
☐ Require a value
☒ Copy from old meter

Utility Management > Meters > Enter Meter Activity

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File Edit Inquiry Maintenance Other Zoom Help

Close

Caselle Connect® > Utility Management > Meters > Enter Meter Activity

Caselle Connect® Enter Meter Activity

Customer: 1.108.01

Customer name: Brown's Garage

Service address: 1228 Woodbridge Trl

Action code: Electric Install Reading

Meter ID:

Install date:

Install reading:

Read route: 0

Read sequence: 0

Meter size:

Multiplier: .0000

Meter location:

EMR code:

EMR ID:

Select the **Action** being installed.

If using INSTALL METER when the customer already has that service you will get the following warning message:

Warning

This location already has the following active meters: 394783KS.

Possible solutions:

- 1) Continue to install the new meter at this location. The meters will be treated as multiple meters.
- 2) Remove the existing meter from this location.

☐ Suppress this warning message

OK

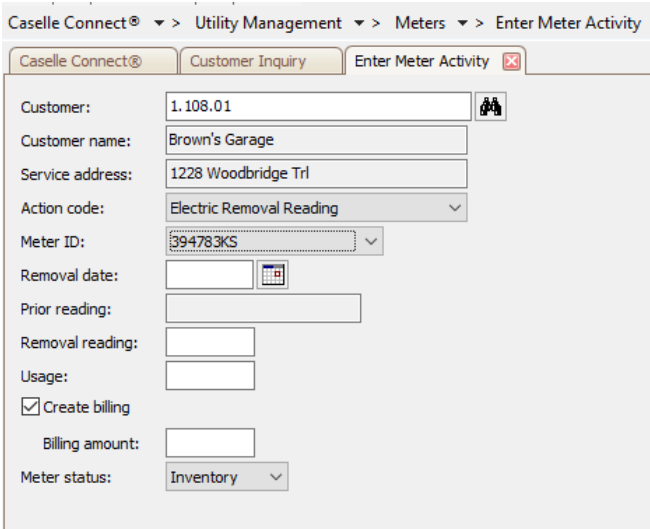
Anycity Corporation admin C:\a\startup Local - Connect Mon, Sep 10, 2018 11:34 AM

1. SERVICE Meter Install

- Adds the service record to the customer, adds the meter to inventory, and installs it on the location (service address)
- Put in all of the information needed about the meter on the Install. These fields can be added or removed to be exactly what you need (see ACTION CODES). Otherwise, you can always go into Modify Existing Meters to add/correct any fields
- Make sure the Install reading/date is correct – this cannot be corrected in Correct Prior Reading/Usages – to fix errors, a Civic Support ticket will need to be logged

2. SERVICE Meter Remove

- Removes the meter from the location, changes the status of the meter (inventory if meter may be used again, retired if being discarded), creates a meter activity record and a billing transaction for the removal usage if needed



3. SERVICE Meter Replace

- Removes the meter from the location, changes the status of the meter, creates a meter activity record and a billing transaction for the removal usage and installs the new meter at the location.
- Replace will copy any pertinent information from the old meter to the new meter; for example: Read Route and Read Sequence – See ACTION CODES to set other fields to copy forward



Caselle Connect® > Utility Management > Meters > Enter Meter Activity

Caselle Connect® Customer Inquiry Enter Meter Activity

Customer: 1.108.01

Customer name: Brown's Garage

Service address: 1228 Woodbridge Trl

Action code: Electric Replace Reading

Old meter ID: 394783KS

Removal date:

Prior reading:

Removal reading:

Usage:

Read route: 0

Read sequence: 0

Meter location:

Old meter status: Inventory

New meter ID:

Install date:

Install reading:

Read route: 0

Read sequence: 0

Meter size:

Multiplier: .0000

Meter location:

EMR code:


EMR ID:

c. Replacement Timing

Timing of Meter Replacements is IMPORTANT!

The ideal time to do a Meter Replacement is between the beginning of the period and before Meter Reading. If done during this time frame, no additional steps are necessary.

If a Meter Replacement is done after meter reading has been completed. The following steps should be followed:

1. Delete the existing meter reading through Enter Meter Readings.
 - a. Go into Enter Meter Readings in Single Mode
 - b. Enter the customer number
 - c. Highlight the read to delete and click on the 
2. Replace the meter through Meter Activity.
3. Enter a reading for the new meter, **even if it is 0**, through Enter Meter Readings.

Reasoning:

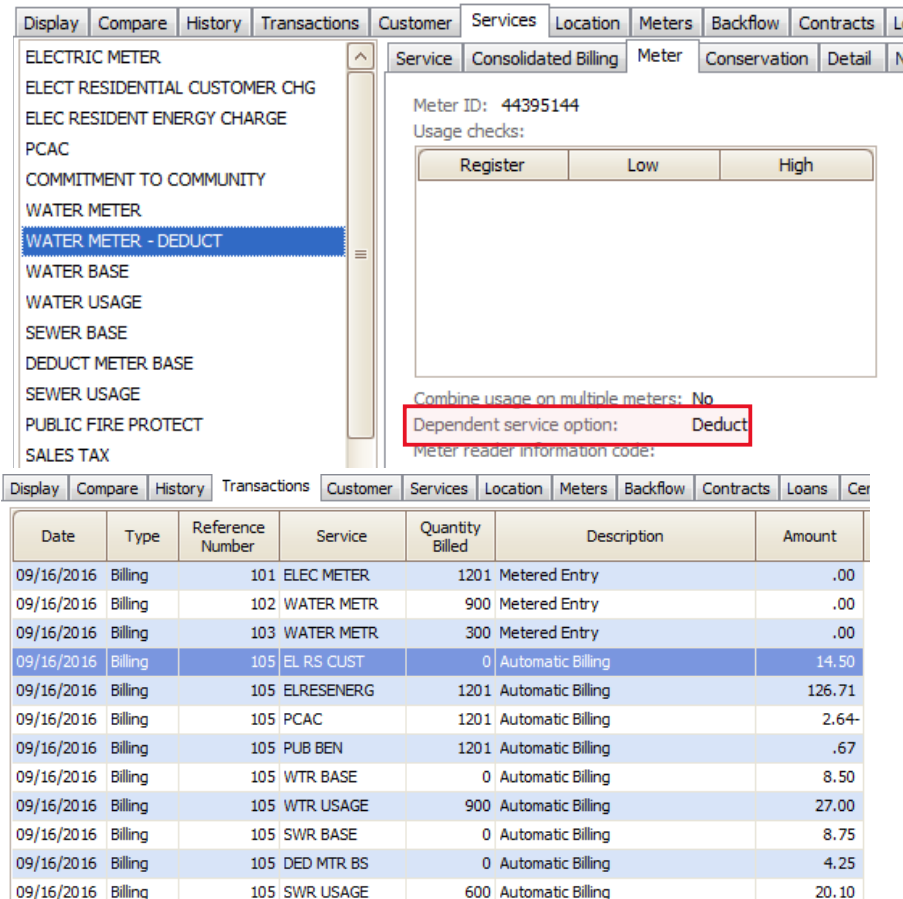
1. Delete the existing meter reading because the usage is already calculated on the existing meter reading. When the meter is removed the removal record will not include that usage. The usage on that meter reading will not be billed. When a meter replacement is done, only the usage from the removal record and the new meter's period meter reading is billed.
2. There must be a Period Meter Reading after the meter removal to pick up the usage from the removal record. If there is not a period meter reading, the usage from the removal record will not be billed.

Multiple Meters

Locations can have multiple meters for many different reasons. For example, there may be 2 meters on the account where everything is billed for both meters or there may be a Water/Sewer meter and a Deduct meter on an account where Water is billed on the main meter and Sewer is billed the difference of the two meters.

1. Deduct Water Meters

- There are 2 meters on the account; a Water/Sewer meter and a Deduct meter.
- Water is billed on the main sewer and Sewer is billed on the difference of the two meters
- Set Dependent service option to Deduct to subtract the usage on this meter from the main meter when billing Sewer



Display Compare History Transactions Customer Services Location Meters Backflow Contracts Lc

ELECTRIC METER
ELECT RESIDENTIAL CUSTOMER CHG
ELEC RESIDENT ENERGY CHARGE
PCAC
COMMITMENT TO COMMUNITY
WATER METER
WATER METER - DEDUCT
WATER BASE
WATER USAGE
SEWER BASE
DEDUCT METER BASE
SEWER USAGE
PUBLIC FIRE PROTECT
SALES TAX

Service Consolidated Billing Meter Conservation Detail N

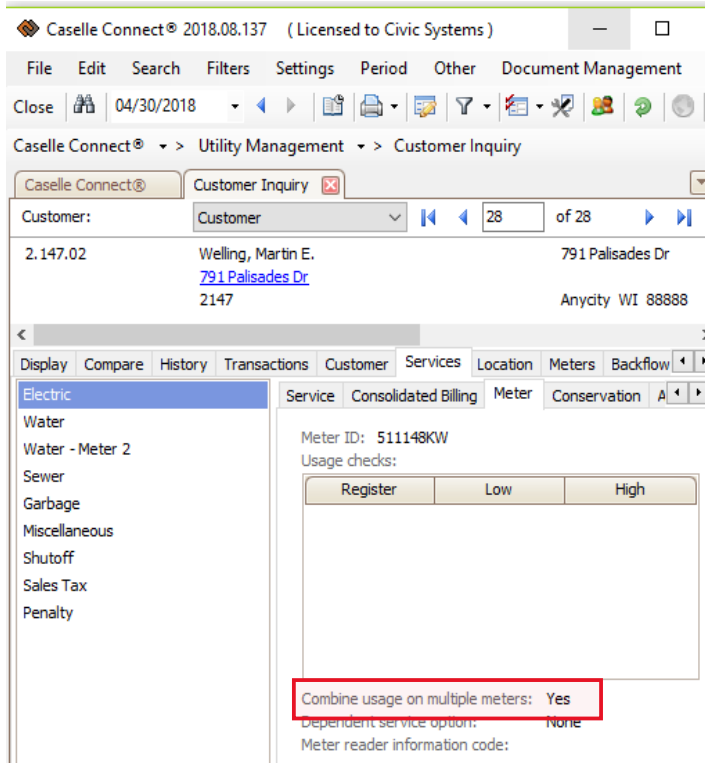
Meter ID: 44395144
Usage checks:
Register Low High

Combine usage on multiple meters: No
Dependent service option: **Deduct**
Meter reader information code:

Date	Type	Reference Number	Service	Quantity Billed	Description	Amount
09/16/2016	Billing	101	ELEC METER	1201	Metered Entry	.00
09/16/2016	Billing	102	WATER METR	900	Metered Entry	.00
09/16/2016	Billing	103	WATER METR	300	Metered Entry	.00
09/16/2016	Billing	105	EL RS CUST	0	Automatic Billing	14.50
09/16/2016	Billing	105	ELRESENERG	1201	Automatic Billing	126.71
09/16/2016	Billing	105	PCAC	1201	Automatic Billing	2.64
09/16/2016	Billing	105	PUB BEN	1201	Automatic Billing	.67
09/16/2016	Billing	105	WTR BASE	0	Automatic Billing	8.50
09/16/2016	Billing	105	WTR USAGE	900	Automatic Billing	27.00
09/16/2016	Billing	105	SWR BASE	0	Automatic Billing	8.75
09/16/2016	Billing	105	DED MTR BS	0	Automatic Billing	4.25
09/16/2016	Billing	105	SWR USAGE	600	Automatic Billing	20.10

2. Combine Usage on Multiple Meters

- There are 2 meters on the account where everything is billed for both
- Set Combine usage on multiple meters to YES to combine usage for multiple meters when billing using step rates, usually used for water



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File Edit Search Filters Settings Period Other Document Management

Close 04/30/2018

Caselle Connect® > Utility Management > Customer Inquiry

Customer: Customer 28 of 28

2.147.02 Welling, Martin E. 791 Palisades Dr
791 Palisades Dr
2147 Anycity WI 88888

Display Compare History Transactions Customer Services Location Meters Backflow

Electric Water Water - Meter 2 Sewer Garbage Miscellaneous Shutoff Sales Tax Penalty

Service Consolidated Billing Meter Conservation

Meter ID: 511148KW
Usage checks:
Register Low High

Combine usage on multiple meters: Yes
Dependent service option: None
Meter reader information code:

3. Compound Meters

- Set up as 2 meters, one for high flow and one for low flow

Display

Compare

History

Transactions

Customer

Services

Location

Meters

Backflow

C

Meter ID	Service
983W-LOW	WATER METER
983W-HIGH	WATER METER
1459E	ELECTRIC METER - Removed

Meter: 1472E

Status:

Active

Route-Sequence:

4-0

Multiplier:

100.0000

- On the metered services, these can be flagged to combine usage on multiple meters if required

Display	Compare	History	Transactions	Customer	Services	Location	Meters	Backflow	Contracts	Loans	Ce			
ELECTRIC METER ELECT COM USAGE (Disc) ELECT LARGE POWER CUST CHARGE ELECT LARGE POWER ON PK ELECT LARGE POWER OFF PK ELECT LARGE POWER DEMAND ELECT LARGE POWER CUST DMD YARD LIGHT FIXED POWER COST ADJUSTMENT COMMITMENT TO COMM CP1 - CP2 WATER METER WATER METER - Meter 2 WATER CUSTOMER CHARGE WATER USAGE					Service Consolidated Billing Meter Conservation Detail Meter ID: 983W-LOW Usage checks: <table border="1"> <tr> <td>Register</td> <td>Low</td> <td>High</td> </tr> </table> Combine usage on multiple meters: Yes Dependent service option: None Meter reader information code:							Register	Low	High
Register	Low	High												

4. Power Generation Meters – Solar/Wind Meters

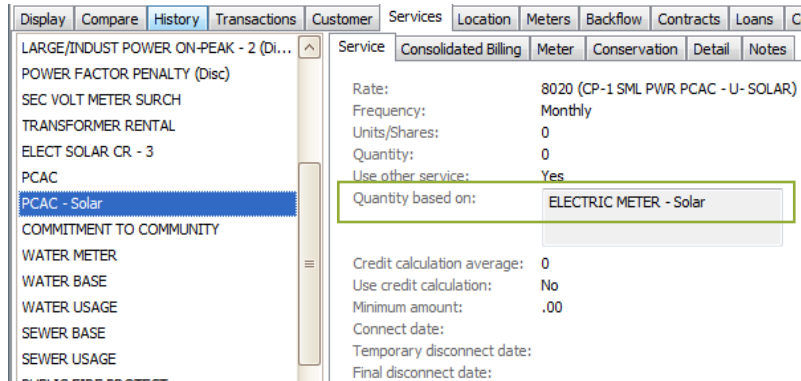
- Customers that generate their own power through solar or wind should have 2 meters. One meter tracks the Delivered usage and one meter tracks the Received (generated) usage. The credit for the generation meter will be handled with the rate on the Solar or Wind service.

Display	Compare	History	Transactions	Customer	Services	Location	Meters	Backflow	Con								
<table border="1"> <thead> <tr> <th>Meter ID</th><th>Service</th></tr> </thead> <tbody> <tr> <td>SP35976283DEL</td><td>ELECTRIC METER</td></tr> <tr> <td>SP35976283REC</td><td>ELECTRIC METER</td></tr> <tr> <td>35762847</td><td>WATER METER</td></tr> </tbody> </table>					Meter ID	Service	SP35976283DEL	ELECTRIC METER	SP35976283REC	ELECTRIC METER	35762847	WATER METER	Meter: SP35976283DEL Status: Active Route-Sequence: 82-1250 Multiplier: 200.0000				
Meter ID	Service																
SP35976283DEL	ELECTRIC METER																
SP35976283REC	ELECTRIC METER																
35762847	WATER METER																

- The normal PCAC service will have Quantity based on the delivered meter (normal meter)

Display	Compare	History	Transactions	Customer	Services	Location	Meters	Backflow	Contracts	Loans	Ce
LARGE/INDUST POWER ON-PEAK - 2 (Di... POWER FACTOR PENALTY (Disc) SEC VOLT METER SURCH TRANSFORMER RENTAL ELECT SOLAR CR - 3 PCAC PCAC - Solar COMMITMENT TO COMMUNITY WATER METER WATER BASE WATER USAGE SEWER BASE SEWER USAGE PUBLIC FIRE PROTECT					Service Consolidated Billing Meter Conservation Detail Notes Rate: 8017 (CP-1 SML PWR PCAC - U) Frequency: Monthly Units/Shares: 0 Quantity: 0 Use other service: Yes Quantity based on: ELECTRIC METER Credit calculation average: 0 Use credit calculation: No Minimum amount: .00 Connect date: 11/01/2010 Temporary disconnect date: Final disconnect date:						

- c. A separate PCAC rate will be set up for the generation credit and added to the account. This rate will be the reverse sign of the normal PCAC rate and the service will point to the generation (solar/wind) meter.



The screenshot shows the 'Services' tab in the Civicsystems software. The 'PCAC - Solar' service is selected in the left-hand list. The right-hand pane displays the configuration for this service:

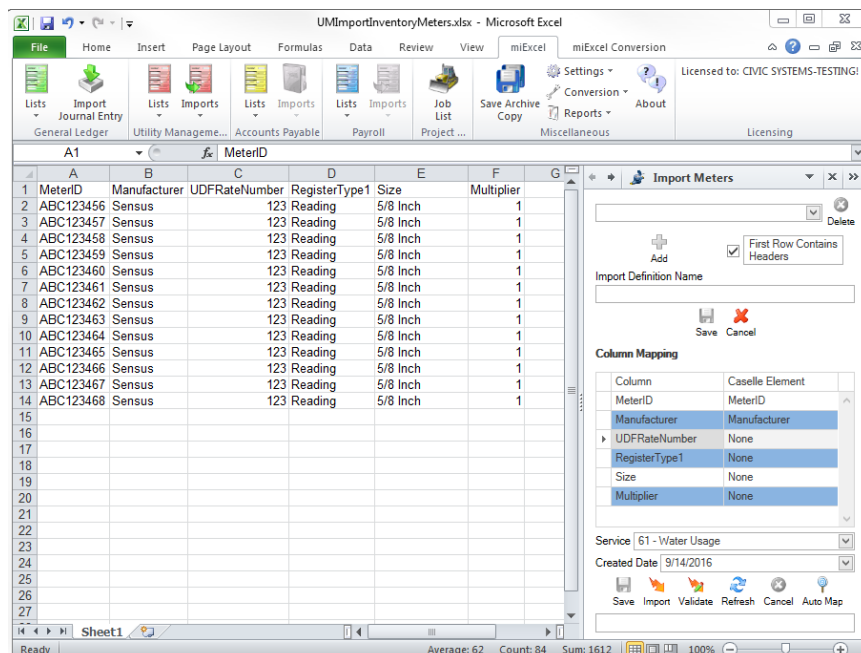
- Rate: 8020 (CP-1 SML PWR PCAC - U- SOLAR)
- Frequency: Monthly
- Units/Shares: 0
- Quantity: 0
- Use other service: Yes
- Quantity based on: ELECTRIC METER - Solar
- Credit calculation average: 0
- Use credit calculation: No
- Minimum amount: .00
- Connect date:
- Temporary disconnect date:
- Final disconnect date:

miExcel UB

miExcel UB is a tool used to get data out of Connect for reports or to import data into Connect. There are 3 import functions in miExcel UB: Meters to Inventory, Rates, Replaces Meters. miExcel UB has reporting options as well.

1. Meters to Inventory

- a. Imports meters and associated information from a spreadsheet into the Meter table



The screenshot shows the 'miExcel UB' software interface with the 'Import Meters' dialog box open. The dialog box is titled 'Import Meters' and contains the following fields and options:

- Import Definition Name:** A text field for naming the import.
- Column Mapping:** A table mapping spreadsheet columns to database fields.

Column	Caselle Element
MeterID	MeterID
Manufacturer	Manufacturer
UDFRateNumber	None
RegisterType1	None
Size	None
Multiplier	None
- Service:** 61 - Water Usage
- Created Date:** 9/14/2016
- Buttons:** Save, Import, Validate, Refresh, Cancel, Auto Map.

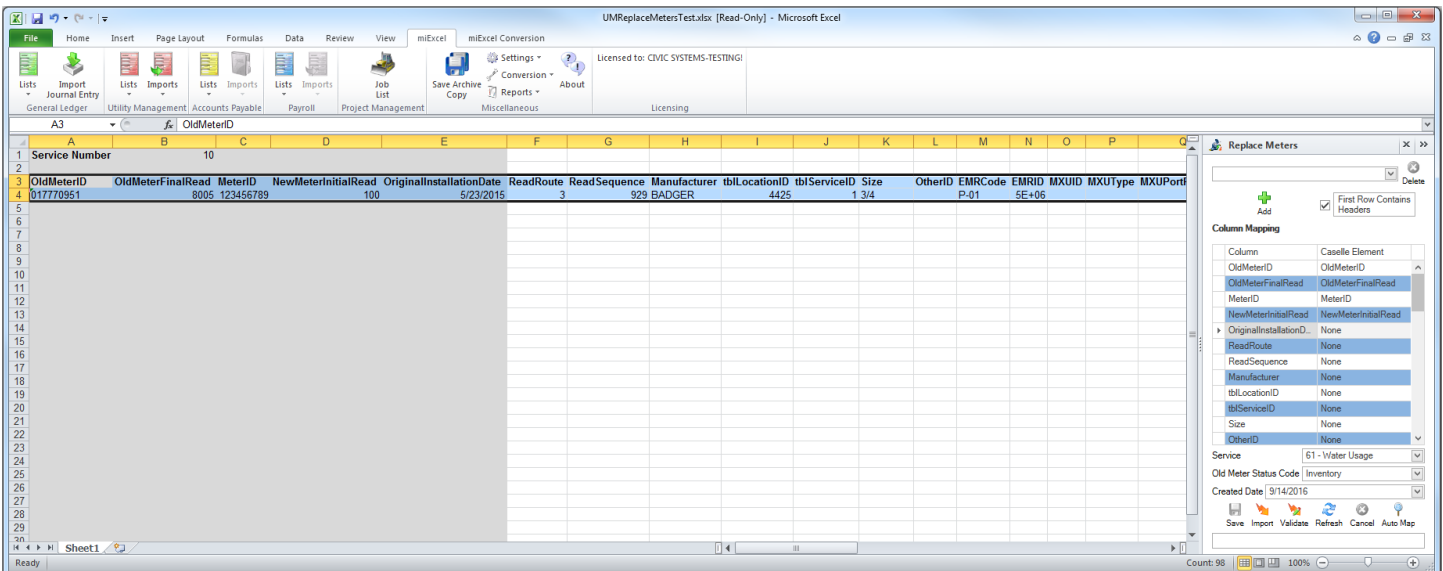
The background shows a spreadsheet with the following data:

MeterID	Manufacturer	UDFRateNumber	RegisterType1	Size	Multiplier
ABC123456	Sensus	123	Reading	5/8 Inch	1
ABC123457	Sensus	123	Reading	5/8 Inch	1
ABC123458	Sensus	123	Reading	5/8 Inch	1
ABC123459	Sensus	123	Reading	5/8 Inch	1
ABC123460	Sensus	123	Reading	5/8 Inch	1
ABC123461	Sensus	123	Reading	5/8 Inch	1
ABC123462	Sensus	123	Reading	5/8 Inch	1
ABC123463	Sensus	123	Reading	5/8 Inch	1
ABC123464	Sensus	123	Reading	5/8 Inch	1
ABC123465	Sensus	123	Reading	5/8 Inch	1
ABC123466	Sensus	123	Reading	5/8 Inch	1
ABC123467	Sensus	123	Reading	5/8 Inch	1
ABC123468	Sensus	123	Reading	5/8 Inch	1

- b. On the spreadsheet of meter information, highlight the columns and rows to be imported
- c. Click Imports > Meters to Inventory
- d. On the right side, Import Meters will open
- e. Check First Row Contains Headers (only if the spreadsheet does use a header row)
- f. Map all of the columns to the correct Caselle fields
- g. Enter the service for the Meters
- h. Click Validate to check for errors
- i. Once validated, click Import to actually import the meters

2. Replace Meters

- a. Imports meters and associated information from a spreadsheet into the Meter Table and imports the Meter Activity records for the meter replacement



The screenshot shows a Microsoft Excel spreadsheet titled 'UMReplaceMetersTest.xlsx [Read-Only] - Microsoft Excel'. The spreadsheet has columns A through Q. Row 1 is a header row with the following labels: Service Number, OldMeterID, OldMeterFinalRead, MeterID, NewMeterInitialRead, OriginalInstallationDate, ReadRoute, ReadSequence, Manufacturer, tblLocationID, tblServiceID, Size, OtherID, EMRCode, EMRID, MXUID, MXUType, and MXUPort. Row 2 contains the following data: 10, 017770951, 8005, 123456789, 100, 5/23/2015, 3, 929, BADGER, 4425, 1, 3/4, P-01, SE+06, and empty cells for the remaining columns. The 'Replace Meters' dialog box is open on the right side of the spreadsheet. It has a 'First Row Contains Headers' checkbox checked. The 'Column Mapping' section shows a list of columns on the left and a list of Caselle elements on the right. The columns are: OldMeterID, OldMeterFinalRead, MeterID, NewMeterInitialRead, OriginalInstallationDate, ReadRoute, ReadSequence, Manufacturer, tblLocationID, tblServiceID, Size, OtherID. The Caselle elements are: OldMeterID, OldMeterFinalRead, MeterID, NewMeterInitialRead, OriginalInstallationDate, ReadRoute, ReadSequence, Manufacturer, tblLocationID, tblServiceID, Size, OtherID. The 'Service' dropdown is set to '61 - Water Usage'. The 'Old Meter Status Code' dropdown is set to 'Inventory'. The 'Created Date' is set to '9/14/2016'. The 'Save' button is highlighted.

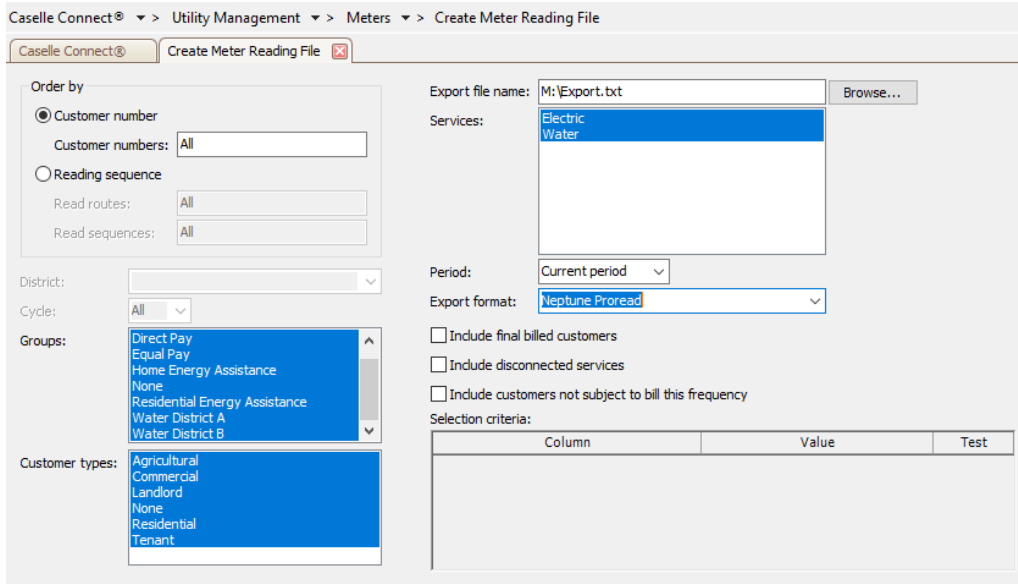
- b. On the spreadsheet of replace meter information, highlight the columns and rows to be imported
- c. Click Imports > Replace Meters
- d. On the right side, Import Meters will open
- e. Check First Row Contains Headers (if your spreadsheet does actually have a header column)
- f. Map all of the columns to the correct Caselle fields
- g. Enter the Service for the Meters
- h. Enter the Old Meter Status Code
- i. Click Validate to check for errors
- j. Once validated, click Import to replace the meters

Meter Reading

Check your checklist in Connect for these steps as they should walk you through this process.

1. Create Meter Reading File

- a. Used to create the import or request file for the electronic reading software
 - i. When in the process of switching electronic reading software, this will be used for both
- b. Export file name and the Export format may need to be changed depending on which meters are being read
- c. Read Route and Selection Criteria will be used to determine which meters are loaded into which export file



Caselle Connect® > Utility Management > Meters > Create Meter Reading File

Caselle Connect® Create Meter Reading File

Order by:

- ☒ Customer number

Customer numbers: All
- ☐ Reading sequence

Read routes: All

Read sequences: All

District: [Dropdown]

Cycle: All [Dropdown]

Groups:

- Direct Pay
- Equal Pay
- Home Energy Assistance
- None
- Residential Energy Assistance
- Water District A
- Water District B

Customer types:

- Agricultural
- Commercial
- Landlord
- None
- Residential
- Tenant

Export file name: M:\Export.txt [Browse...]

Services:

- Electric
- Water

Period: Current period [Dropdown]

Export format: Neptune Pre-read [Dropdown]

☐ Include final billed customers

☐ Include disconnected services

☐ Include customers not subject to bill this frequency

Selection criteria:

Column	Value	Test

2. Import Meter Readings

- a. Used to import reads from the electronic reading software
 - i. When in the process of switching electronic reading software, this will be used for both
- b. The Import file name and the Import format may need to be changed depending on which meters are being read
- c. Utilities that read meters throughout the period sometimes choose not to create billing transactions until they are ready to work on billing. This can be done by unchecking Create billing transactions. If this is unchecked at this point, then at the beginning of billing, Calculate Amount/Usages will need to be run

Caselle Connect® > Utility Management > Meters > Import Meter Readings

Caselle Connect® Import Meter Readings

Import file name: M:\UPLOAD-2022.txt

Services:

Electric

Water

Period:

Current period

Import format:

Neptune Proread

☒ Create billing transactions

Billing date: 04/30/2022

☒ Assume meter rollovers when the current read is less than the prior read

Cost adjustments:

Service	Factor

Customer numbers:

All

District:

Cycle:

All

Groups:

Direct Pay

Equal Pay

Home Energy Assistance

None

Residential Energy Assistance

Water District A

Water District B

Customer types:

Agricultural

Commercial

Landlord

None

Residential

Tenant

☒ Include final billed customers

☒ Include disconnected services

3. Enter Meter Readings

- Meter readings can be entered manually
- Meter readings can be corrected
- Batch mode
 - Used when entering ALL reads manually
 - Brings in reads in Reading Sequence or Customer Number order
 - Can choose to bring in 1 route at a time if meters organized that way
- Single mode
 - Used when correcting reads
 - Allows you to enter the individual customer numbers that need to be corrected
- Create billing transactions
 - Unchecked if you don't want the dollar amounts created at this time
- DOUBLE CHECK the Reading Date – it defaults to current day

Caselle Connect® > Utility Management > Meters > Enter Meter Readings

Caselle Connect® Enter Meter Readings

Meter Reading Options

General Cost Adjustment Factors

Reading date: 04/12/2022

Billing date: 04/30/2022

Period:

Current period

Services:

Electric

Water

District:

Cycle:

All

Groups:

Compound Meters

Direct Pay

Equal Pay

Home Energy Assistance

Order by

☒ Customer number

Customer numbers:

All

☐ Reading sequence

Read routes:

All

Read sequences:

All

Entry mode

☒ Batch mode

☐ Single mode

☒ Create billing transactions

☒ Beep when additional registers exist

Batch Mode:

Caselle Connect® > Utility Management > Meters > Enter Meter Readings

Caselle Connect® Enter Meter Readings

Customer number: Name: Acme Manufacturing
 Reading date: Service address: 4661 Monaco Street
 Service: Elec Meter ID: 364718KW

Prior Reading	Per	Reader Comment	Read	Multiplier	Usage	Amount
03/27/2022	22597	1		10.0000		0

Customer Number	Service	Reader Comment	Demand Used:	kVAR Reading:	Net Reading:	Power Factor:	Low Compound Reading	Read	Multiplier	Usage	Amount
1.101.01	EL										
1.101.01	WT										
1.102.01	EL							10	1.0000	8265	

Single Mode:

Caselle Connect® > Utility Management > Meters > Enter Meter Readings

Caselle Connect® Enter Meter Readings

Customer number: Name: Brown's Garage
 Reading date: Service address: 1228 Woodbridge Trl
 Service: Elec Meter ID: 394783KS

Prior Reading	Per	Reader Comment	Read	Multiplier	Usage	Amount	St
03/27/2022	43669	1		1.0000		0	

Customer Number	Service	Reader Comment	Register	Read	Multiplier	Usage	Amount
1.108.01	EL		Reading				
1.108.01	WT		Reading				

4. **Calculate Metered Amounts/Usages** (only if you previously unchecked Create billing transactions when importing meter reads)
 - a. Used to calculate metered billing transactions if they were NOT created when the reads were imported or manually entered
 - b. Can be used to recalculate metered billing transactions if rates were changed after meter reading was imported

- c. NOTE: If you have overwritten usages in Enter Meter Readings, they will be recalculated based on the readings if you select Calculate Usages here

Caselle Connect® > Utility Management > Meters > Calculate Metered Amounts/Usages

Caselle Connect® Calculate Metered...

Make sure you have a current backup before proceeding.
Use this routine to recalculate amounts, usages, or amounts and usages for metered services. Example: Billing amounts could be recalculated if a rate has changed or if billings were not created when readings were entered or imported.

☒ Calculate amounts
☒ Calculate usages

Services: Electric
Water

District:
Cycle: 1
Billing date: 04/30/2022

Cost adjustments:

Service	Factor

☐ Replace existing amounts with minimum amounts

Selection criteria:

Column	Value	Test
Customer.Customer number	All	Entire field
Meter.Read route	All	Entire field

5. Correct Prior Readings/Usages

- a. Used to correct a prior reading only or to correct a prior reading and usage which creates a billing adjustment transaction

Caselle Connect® > Utility Management > Meters > Correct Prior Readings/Usages

Caselle Connect® Correct Prior Readings/Usages

Input date: 04/20/2022
Customer: 110801
Service: Water
Meter ID: 42163251
Period to correct: 03/31/2022

Customer information
Customer number: 1.108.01
Name: Brown's Garage
Address: 60 N Commerce Ave
Anycity WI 88888
Service address: 1228 Woodbridge Trl

Correct readings

Read	Multiplier	Usage
9032	1.0000	16

03/31/2022 readings

Read	Multiplier	Usage
9032	1.0000	16

☒ Correct previously billed amounts

Service	Previously Billed Amount	Correct Amount	Adjustment
Water	18.60	.00	.00
Sewer	24.80	.00	.00

6. Meter Reading Proof Report

- Used to check for extremes – comparing customers to each other, rather than themselves
- Best exported to Excel
- Sort by Usage – highest to lowest and lowest to highest (helps find rollovers)
- Sort by Amount – highest to lowest and lowest to highest (will help find any credits)

Caselle Connect® > Utility Management > Meters > Meter Reading Proof Report

Caselle Connect® Meter Reading Proof Report

Title: Meter Reading Proof Report - Export ☒ Default report

Report Options Columns Sections Print Settings

Output options: ☐ Print ☐ Save as ☒ Export ☐ Send to Document Management ☒ Close program after printing

Print Save As / Export

Save options

Save as type: PDF Characters per inch: 17

File name: Browse...

Variables: {Counter} Insert variable

Export options

File name: H:\Symposium\Meter management\Meter Reading Proof Report.csv Browse...

Variables: {Counter} Insert variable Field delimiter: , Surround character: *

☐ List one field per line ☒ List one record per line End of field: End of record:

☐ Include page header ☒ Include column headings ☐ Include page footer

☐ Include selection criteria ☐ Include totals ☐ Include page breaks

File	Home	Insert	Page Layout	Formulas	Data	Review	View	Help	Connector	miExcel	miExcel Conversion Tools	Acrobat	S
<div> <div> <div> <div>Undo</div> <div>Redo</div> </div> <div> <div>Cut</div> <div>Copy</div> <div>Paste</div> <div>Format Painter</div> </div> <div> <div>Clipboard</div> </div> </div> <div> <div>Open</div> <div>Sign in to Huddle</div> <div>Comments</div> <div>Feedback</div> </div> <div> <div>Huddle</div> </div> </div> <div> <div>Arial</div> <div>10</div> <div>A</div> <div>A</div> <div>B</div> <div>I</div> <div>U</div> <div>Font</div> </div> <div> <div>Wrap Text</div> <div>Merge & Center</div> <div>Alignment</div> </div>													

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Reading

7. Meter Reading Exception Report(s)

- a. Used to compare each customer to their previous reading
- b. Usually easier to read when broken down into various reports:
 - i. No Reads – Inactive with Usage
 - ii. High/Low Report
 - iii. Estimated Reads
 - iv. Consecutive Estimates
 - v. Rollovers
 - vi. No Consumption
 - vii. 3 Consecutive Periods No Usage

Caselle Connect® > Utility Management > Reports > Meter Reading Exception Report

Caselle Connect® Meter Reading Exception Report

Definition: Meter Reading Exception Report - by Customer Number [Caselle Master] Filter: All 9 of 10

Report Options Additional Options Columns Print Settings

Report dates

From: 04/01/2022 To: 04/30/2022

[Advanced options...](#)

☐ Check 2 consecutive periods

☐ Include only period meter readings

Exceptions to check for

☒ Active with no reading

☒ Active with no usage

☒ Inactive with usage

☐ Exact same usage

☐ Meter with a register that rolled over

☐ Meter activity with information codes

☒ Information Code

☒ Broken Meter

☒ Check for Tampering

☒ Estimated Reading

☒ Locked Gate - Key in Office

☒ Meter usage outside the high/low range

☒ Use service options

☐ Use: Percentage

☒ Based on 1 previous periods

☐ Based on the same period in the prior year

Low: .0000 %

High: .0000 %

Selection criteria:

Column	Value	Compare
Customer.Customer number	All	Entire field
Meter.Read route	All	Entire field
Meter.Read sequence	All	Entire field

Report order:

Section: Main

Column	Sort	Title	Total	Line	Page	Use
Customer.Customer number	Ascending			<input checked="" type="checkbox"/>	<input type="checkbox"/>	Entire field
Meter.Meter ID	Ascending			<input type="checkbox"/>	<input type="checkbox"/>	Entire field
[Report].Service	Ascending			<input type="checkbox"/>	<input type="checkbox"/>	Entire field
[Report].Exception	None			<input type="checkbox"/>	<input type="checkbox"/>	Entire field

Report sections:

Section	Print	Headings	Detail	Totals	Line	Page
Main	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Anycity Corporation

 Meter Reading Exception Report
 Report Dates: 02/01/2014 - 02/28/2014

 Page: 1
 Aug 01, 2017 10:47AM

Customer Number Order

Report Criteria:

Active meters with no reading, Active meters with no usage, Disconnected meters with usage, Meter usage outside the high/low range

Customer No Rte-Seq	Name Service Address	Meter ID Meter Location	Service	Register Title High/Low	Prior Read Prior Usage	Pr Com	Current Read Current Usage	Current Comment Exception
1.106.01 1-320	Simpson Reception Center 710 E Parkway	18547262 In bushes, 10 ft South of Gazebo	Water	Demand Used /	.0000		.0000	No Consumption
2.145.00 2-120	Spencer Properties 865 Palisades Dr	31842168 10 ft SW of stop sign	Water	Reading Tables/Tables	3,374 61		3,428 54	High
2.147.01 2-200	Welling, Martin E. 791 Palisades Dr	34125667 5 ft North of gate, dogs name is	Water	Reading Tables/Tables	0 0		0 0	No Reading

Need more help? Civic Support Line: 888-241-1517