Web-Based Billing System

Consumer Portal Manual

Contents

Chapter 1: Introduction

Welcome

Welcome to the **Consumer Portal** where you can easily manage your utility account from anywhere.

Product Features

- ability to view and pay your bill online
- ability to set up automatic bank draft
- email the utility office

- sign up for paperless billing
- request a change of address
- direct access to meter reading and consumption information

System Requirements

The ***Consumer Portal*** requires the following minimum system options to perform properly:

- Intel® Core™ i3 or equivalent computer processor, or greater.
- 2 gb of computer memory.
- 50 mb of available hard drive space.
- Microsoft® Windows 8® Professional operating system, or later.
- Microsoft® Internet Explorer® 10 or later web browser or equivalent.
- Adobe® Reader® XI, or later.
- 1024x768 video resolution, displaying 32-bit color quality.
- High-speed internet connectivity with at least 10mb/sec download speed.
- *The Consumer Portal may not work properly on some mobile devices.*

Chapter 2: Getting Started

What to Know Before You Start

- **Consumer Portal** does not allow you to see the *Password* that is already on file, but you can select *Reset Password* to have a link sent, via the email address listed with your utility, to help reset your password.

- If you need to change your User Name to login, you must go into *Settings* from the toolbar.

- Changing your email address in the *My Contacts* section of the main menu will not change your User Name to login.

- Any changes or additions that you make on your account must be reviewed by someone at your utility company before they can be confirmed and recorded permanently.

Accessing the System

Open your web browser to go to the web site **https://www.utilitybillingsystem.net/** and log in with the *User Name* and *Password* that you created earlier as described in the **Consumer Portal Initial Setup Guide**.

Result: The **Consumer Portal** will open to the Welcome (Home) page which is typically the *View My Bill* page as shown below:
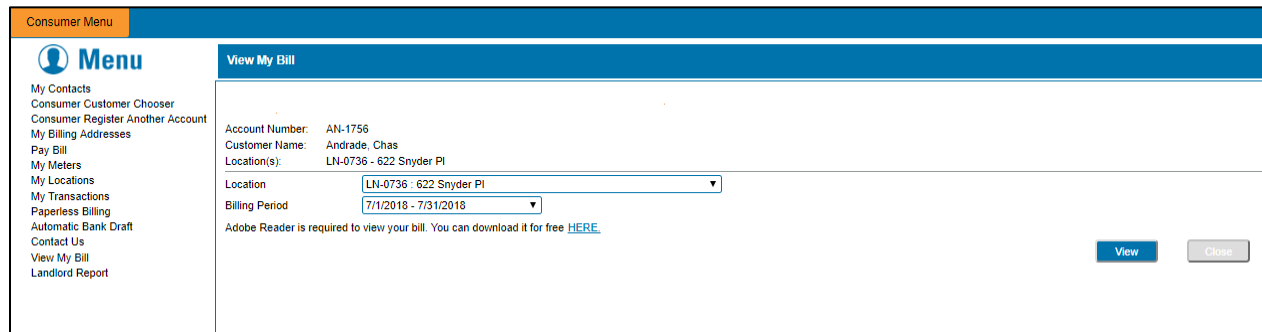
The Toolbar

Along the upper-right side of your browser screen you will see the toolbar, which includes options for the **Web-Based Billing System's Consumer Portal Manual** (this document), *Settings* (for your online profile), and *Logout* to exit the system.
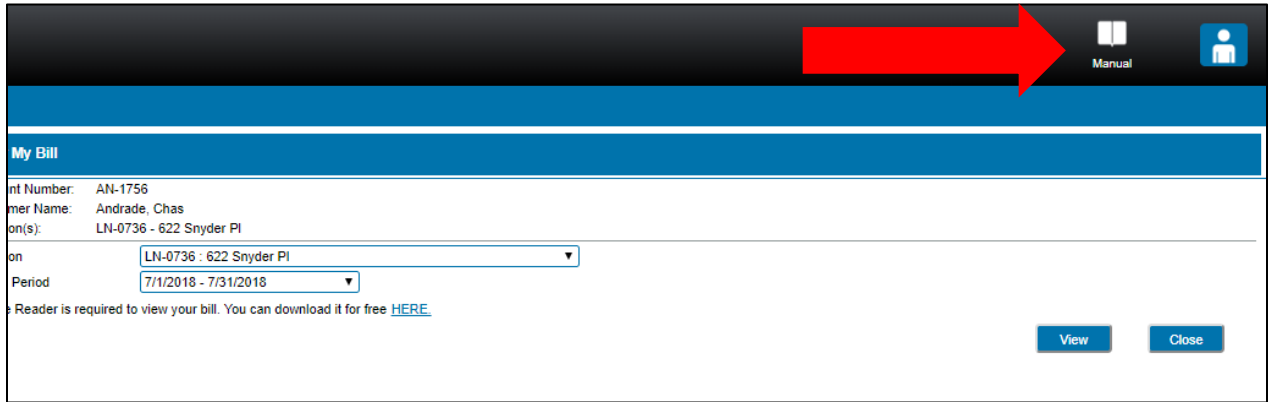
Hovering over the "person" icon with your mouse will display the menu to select *Settings* or *Logout*.

Manual

This is a link to this document, and clicking it will open an Acrobat® print-preview browser tab or window, depending on your web browser's settings. From here, you can print or save the manual as an Acrobat .PDF file to your computer.
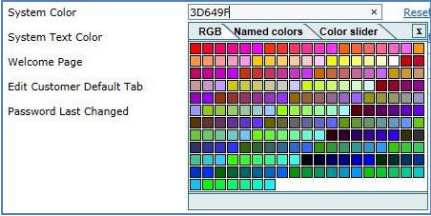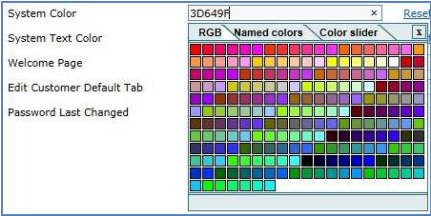
Settings

You can examine and edit your own login information by selecting *Settings* from the toolbar. A sample of the *Settings* screen is shown below:

Refer to the table below for a description of the fields on the *Settings* screen.

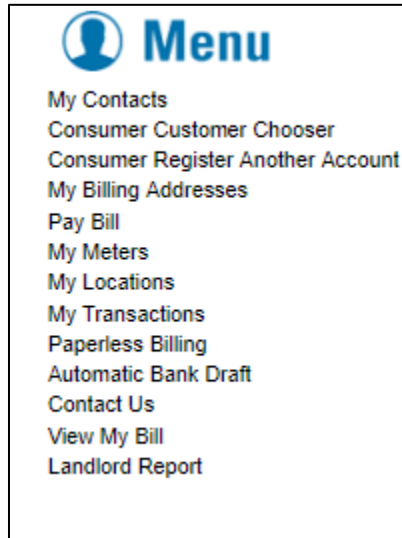| Field	Description
Name	Your name is displayed in Last Name, First Name order.

Field	Description
Password	Your password is hidden behind asterisks in both the *Password* field and the *Confirm Password* field to ensure no passerby can see your password.
Reset Password	If you have forgotten your password, use this feature to reset your password and create a new one.
Email (Login ID)	This is the *Email Address* that the system has on file for you. It can be changed, if you wish, and whatever you enter here will update both your online profile and the contact information your utility has on file for you.
Phone Number	You can use this field to enter your phone number where your utility company can contact you.
Language	Use this feature to select a different default language, if desired by using the pull-down menu. You can select from the following seven options: *English*, *UK English*, *French*, *French Canada*, *Spanish*, *Spanish Mexico*, or *Hebrew*.
System Color	Use this feature to select a different default system color (the background around the white screen), if desired. To change the color: 1. Click in the box next to the *System Color* field to open the color pallet (see image below). 2. Click on the color of your choice. 3. If you change your mind, select the <u>*Reset*</u> button to the right of the box to restore to the default color.

Field	Description
System Text Color	Use this feature to select a different default system text color, if desired. To change: 1. Click in the box next to the *System Text Color* field to open the color pallet (see image below). ![color pallet image showing System Color, System Text Color, Welcome Page, Edit Customer Default Tab, Password Last Changed with 3D649F color value and color grid] 2. Click on the color of your choice. 3. If you change your mind, select the <u>Reset</u> button to the right of the box to restore to the default color.
Welcome Page	Use this feature to select a different Welcome Page (Home Page), that is, the starting page when the system opens. **Note:** This page can be changed **UNLESS** you have multiple accounts.
Password Last Changed	For your records, the system documents the last time your password was changed.

Note: Be sure to select the *Save* button to record your changes or select *Cancel* if you change your mind.

The Menu

Along the left-hand side of the screen you will see the **Consumer Portal** main menu as shown below.

Refer to the table below for a description of the menu options.

Menu Option	Description
My Contacts	Use this option to: • submit requests to change existing contact information. • add additional contact information to your account such as phone numbers or email addresses.
Consumer Customer Chooser	This option is only for customers with multiple accounts with the same utility company. Use this option to switch between accounts. **Note:** If you have multiple accounts, The *Consumer Customer Chooser* will be your Welcome (Home) page. This cannot be changed.
Consumer Register Another Account	This option is only for customers with multiple accounts with the same utility company. Use this option to register additional accounts.
My Billing Address	Use this option to update your mailing information for your utility account.

Menu Option	Description
Pay Bill	This selection displays on the main menu only if your utility company offers this option for you to pay your bill online.
My Meters	Use this option to view the utility meter(s) installed at your property.
My Locations	Use this option to view the property associated with your utility account.
My Transactions	Use this option to view transactions on your account. You can view current and historical transactions, depending on availability.
Paperless Billing	Use this option to sign up for email notifications of your bill instead of statements on paper.
Automatic Bank Draft	If your utility offers this service, you can configure your account information to automatically have your bank account drafted each month.
Contact Us	Use this option to communicate any concerns you may have with your utility company.
View My Bill	Use this option to reprint a copy of a billing statement. This is the default Welcome (Home) page.
Landlord Report	For Landlords use only. Landlords can contact their utility company for more information about the features for this report and making any changes to the settings.

Chapter 3: My Contacts and Billing Address

What to Know Before You Start

- Changing your email address in the *My Contacts* section of the main menu will not change your User Name to login.

- If you need to change your User Name (email address) to login, you must go into *Settings* from the toolbar (see **Chapter 2**) instead of *My Contacts*.

- Your utility company will review any address changes that you make before confirming and saving them for use.

- If you need to add a secondary billing address, your statement will be sent to both your primary address and your secondary billing address.

- The information shown on the *My Locations* screen is displayed for your reference, and cannot be changed or updated from the **Consumer Portal**.

- Contact your utility company directly if you see any errors on the *My Locations* screen to get those errors corrected.

- You will want to add whatever email address is shown on the screen to your email program's contact list or safe senders list, to make sure your computer's security software doesn't accidentally block your email notifications.

- Most utility customers would only see one property where they reside, though many accounts can easily have several service locations on file – such as with commercial or rental properties.

Changing Contact Information

1. Select *My Contacts* from the main menu to add additional contact information to your account.

2. Select the contact information from the *Description* column.

Customer Contacts							
Description	**Contact Type**	**Contact Info**	**Primary**	**Begin Date**	**End Date**	**Recurring Date**	
Email	Email Address	bob@mastermetersystems.com	False			False	

Add Submit Delete Cancel

Close

3. Use the pull-down menu next to the *Contact Type* field to select the type of contact to correct (home phone, cell phone, etc.).

4. Make the necessary changes in the *Contact Info* field.

5. Select the *Submit* button to save the changes.

Adding an Additional Contact Information

1. Select *My Contacts* from the main menu to add additional contact information to your account.

2. Select the *Add* button.

3. If applicable, enter a description in the description field, such as Spouse's Work Number, in the *Description* field.

4. Use the pull-down main menu to select the type of contact, such as work number.

5. If applicable, enter any contact information such as, your spouse's name next to the *Contact Info* field.

6. If applicable, leave the box uncheck next to the *Primary Contact* field.

7. If applicable, enter a beginning date and an ending date in the appropriate fields or click on the calendar icons to select a date. Otherwise, leave these fields blank.

8. If applicable, select the box to add a check mark next to the *Recurring Date* field. Otherwise, leave this field blank.

9. Select the *Submit* button to save the changes.   Your utility company will review/confirm the changes before making them permanent in your records.

My Billing Addresses

Reviewing your Mailing Address Information

1. Select *My Billing Addresses* from the main menu to see what mailing address your utility company has on file for your account.

Bill To Name	Used Address For	Date Started	Date Ended	Street Address
Kent, Clark*	(All Mailings)	5/13/2009		101 Holmhurst Way

<center>Add   Submit   Delete   Cancel   Close</center>

2. Select the address shown in the *Bill to Name* column to see the detail.

3. If necessary, you can make changes and then select the *Submit* button. Your utility company will review any changes before confirming and saving them for use.

4. If you need to research something such as the correct 'zip+4' for your address, you can select the *USPS Address Lookup* option to the right and it will open up another browser tab with the Zip Code Lookup page on the United States Postal Service website.

Adding an Additional Mailing Address

1. Select *My Billing Addresses* from the main menu to see what mailing address your utility company has on file for your account.

2. Select the *Add* button.

Bill To Name	Used Address For	Date Started	Date Ended	Street Address
Kent, Clark*	(All Mailings)	5/13/2009		101 Holmhurst Way

	Add	Submit	Delete	Cancel	Close

Result: The following message will appear:

This option will add an additional billing address to the account, causing multiple bills to print. If this is what you want to do, click OK. Otherwise, click Cancel and edit the existing billing address.

OK   Cancel

3. Select the *OK* button to continue. Otherwise, select the *Cancel* button.

4. Refer to the table below for a description of the fields.

Field	Description
Location	Use the pull-down menu to selection your location.
Billing Name	Either leave the name listed or change the name.
Address 1, 2, 3	Enter the address in the applicable lines.
Valid Dates for This Address	If applicable, select the "to and from" dates that you want the mail delivered to this address. Otherwise, leave blank.
Recurring Address	Select this box to place a check mark if this address will be used again around the same time each year.
Use Address for Mailings	Select what type of correspondence that you want mailed to the second address. Choices are: Late notices, Statements, Form Letters/Mailings, or All Mailings.
Bill in Care of Name	If applicable, enter the "In Care of" name.
Country	Use the pull-down menu to select the applicable country.
City Name	Enter the applicable city name.

Field	Description
Postal Code and *USPS Address Lookup*	Enter the applicable zip code. **Note:** If you do not know the zip code, then select the *USPS Address Lookup* link to search for the correct zip code. You will be directed to USPS zip code lookup page in a new browser tab.

5. When finished, select the *Submit* button to send the changes to your utility company for review.

Viewing My Locations

1. Select *My Locations* from the main menu to see information regarding the property that is associated with the selected customer account:

Location No	Address	Read Seq No.
LN-0098	101 Holmhurst Way	98

Close

2. Refer to the table below for a description of the fields.

Field	Description
Location No.	The designation that your utility company uses when referring to your property.
Address	Lists the address of the location being serviced.

Chapter 4: Paperless Billing and Automatic Bank Drafts

What to Know Before You Start

- If available, the *Paperless Billing* option allows you to receive an email notification of your billing information, instead of a paper bill mailed to you.

- Please note that with the P*aperless Billing* option selected, you will automatically receive an emailed notice that your bill is available to view by logging into your account, rather than receiving your bill by regular mail.

- You will want to add whatever email address is shown on the *Paperless Billing* screen to your email program's contact list or safe senders list, to make sure your computer's security software doesn't accidentally block your email notifications.

- If available, automatic bank drafting is where charges will be drafted against a customer's bank account on or around a certain day of every month or quarter.

- As with your credit card information, the **Web-Based Billing System** stores your bank account in such a way as no one else can see the complete information. Even if you should navigate to another screen within the **Consumer Portal** and then return to the *Automated Bank Draft* page, you would only be shown the same limited information as the people working for your utility company:

Paperless Billing

1. If available, the *Paperless Billing* option allows you to receive an email notification of your billing information, instead of a paper bill mailed to you. If you want this service, first select *Paperless Billing* from the main menu:

2. Simply indicate if you wish to take part in this service or not, and select the *Save* button to record your option.

3. If you are currently part of the paperless billing program, and you wish to stop receiving email notifications, then simply uncheck the option and *Save* button to turn this service off for your account. You will begin receiving traditional billing statements through the mail again.

Automatic Bank Draft

1. If available, automatic bank drafting is where charges will be drafted against a customer's bank account on or around a certain day of every month or quarter. If you want this service, select *Automatic Bank Draft* from the main menu to sign up for this:

2. Enter the *Bank Routing Number* and your *Bank Account Number* as printed on one of your checks or deposit slips – as demonstrated in this example:
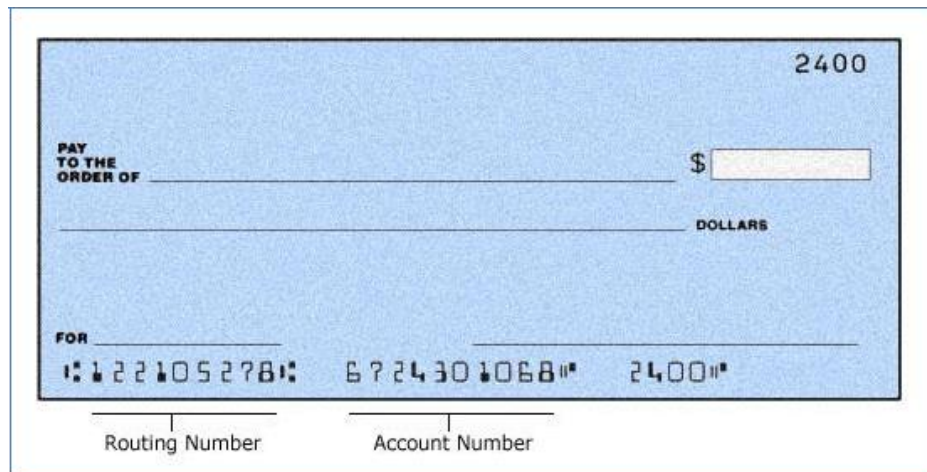
3. Use the pull-down menu to select whether your bank *Account Type* is either *Checking* or *Savings*.

4. Select the *Submit* button to send your information to your utility company, for final testing and implementation.

Chapter 5: Your Utility Bill

What to Know Before You Start

- Adobe Reader is required to view both your bill and your transactions.

- If you don't have a current copy of Adobe Reader, then you can download a copy from the link provided on either the *My Bill* screen or the *My Transactions* screen. If either link is not working correctly for you, you can copy and paste this link into the address bar of your internet browser: https://get.adobe.com/reader/.

- When viewing your transactions, the first transaction listed will always be the "Balance Forward", because this is what your account balance showed as of the *Beginning Date* that you chose. After that you'll see the billing transactions on file, including any charges, taxes, account adjustments, and payments.

Viewing My Bill

1. If it is not set as your Welcome (Home) page, select *View My Bill* from the main menu if you ever need to view or print a billing statement:

2. Confirm the service *Location* applicable to the *Billing Period*.

3. Select *View* to create an Adobe® print preview screen of that billing statement:
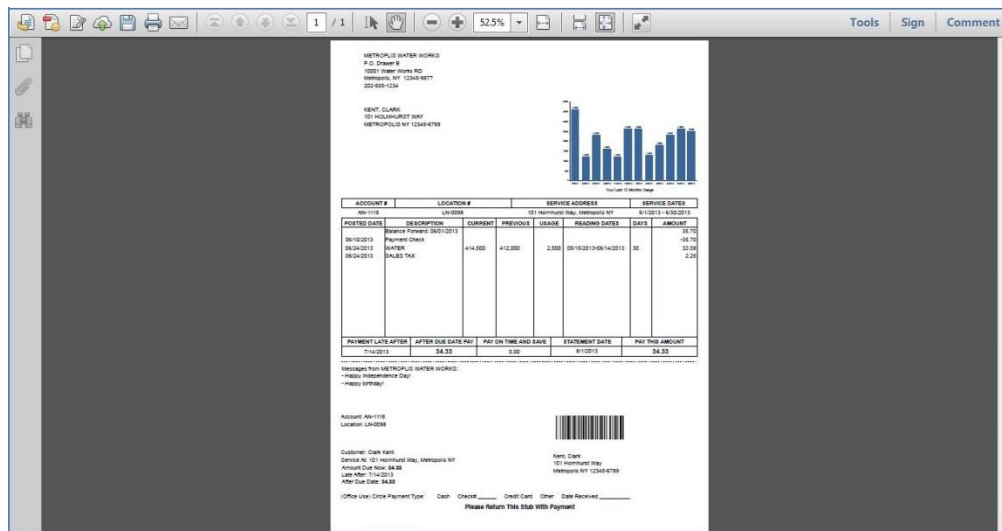
4. If desired, you can print this to paper or save it as an Adobe® .PDF file on your computer.

Viewing My Transactions

1. If you want to see a listing of recent activity on your account, select *My Transactions* from the main menu.

2. Select the *Service Location* (if you have more than one) and the *Beginning* and *Ending Dates* you are interested in, then select the *Search* button to see the transaction history listed on screen:

     Result: Here you'll see all the billing transactions on file for your account within the date range that you specified.

3. You can change the *Beginning* and *Ending Dates* and *Search* again, until you get the information you need.

4. You can change the results to *Export To CSV/Excel* to download a spreadsheet file containing this information, or you can select *Print Preview Results* to open an Adobe® browser window or tab:

Chapter 6: Reviewing your Utility Usage

What to Know Before You Start

Your particular utility company may or may not have as detailed of a reading history available for your meter.

Viewing My Meters

1. Select *My Meters* from the main menu to see information regarding the property that is associated with your customer account:

Customer's Meters						
Account Number: AN-1800						
Customer Name: Gary, Toney						
Location(s): LN-0780 - 3300 Dalton Ct						
Location Number	**Service Type**	**Electronic Number**	**Serial Number**	**Last Read**	**Last Read Date**	**Map Meter**
LN-0780	Water	1100780		939507	4/12/2017 8:15:00 AM	38.056785 / -84.439734

☐ Indicates the meter has been removed.
☐ Indicates the meter is from history.

Close

2. Refer to the table below for a description of the fields in the table grid.

Field	Description
Location Number	The designation that your utility uses when referring to your property.
Service Type	Shows the type of service this meter measures, such as water, natural gas, or electricity.
Electronic Number	This is the identifying number associated with the electronic component attached to the meter.
Serial #	This is the identifying number attached to the physical meter itself.
Last Read	Shows the most recent reading that was received from the meter.
Last Read Date	Shows the date on which the reading was received.

1. Select the meter's *Electronic Number* to open the *View Meter* screen.

2. Select **Daily Readings** from the *Meter Menu* to see what recent readings are on file for your meter:

If they are available, this screen will show the daily readings for your meter going back 30 days from the current date.

3. Refer to the table below.

Field	Description
Reading Date	This is the date in which the reading was received.
Reading	This is the numbers that were showing on the meter's register (electronic component) when the reading was recorded/received.
Factor	This describes the reading resolution of your meter. The example above shows a *Factor* of "1", meaning each swing of the odometer needle is one unit (one gallon, one cubic-foot, etc.). If your meter was such that each swing of the needle equaled 10 gallons, for example, then it would have a *Factor* of "10" instead, and the *Extended Read* would include one additional zero; a *Factor* of "100" would stand for two zeros, and so on.
Extended Read	This shows the full meter reading with the *Factor* being included.
Status	This shows the condition of the meter when this reading was recorded.
Consumption	This is the usage that is calculated using the following formula: current extended read – previous extended read = consumption.

4. If applicable, you can change the date range and select the *Search* button to update the listing with new results.

5. Use the pull-down menu to make your selection of the type of search that you want. Options available are:

- *Show Results in Grid:* This is the default.

- *Print Line Graph*: This will generate a report in an Adobe® print-preview format, in a separate window or tab in your internet browser, showing a list of the readings and consumptions. See image below:
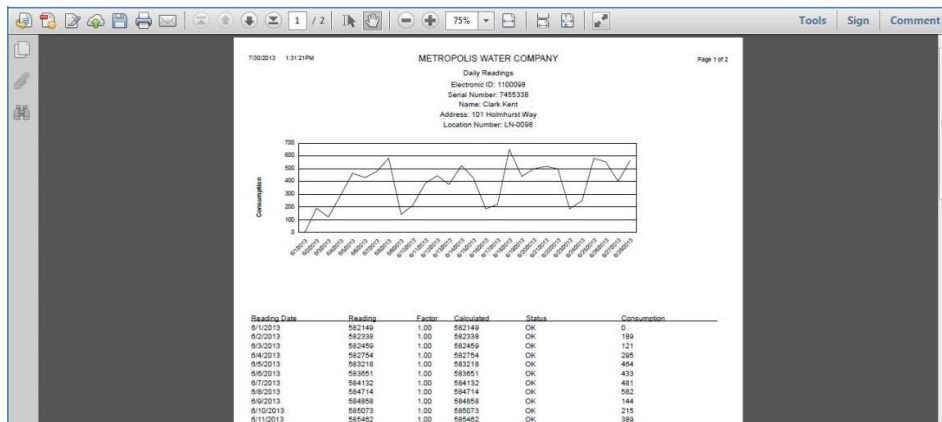
   The chart at the top of each page shows all the consumptions listed on that page in a graph, for easier examination.

- *Print Bar Graph:* This displays the same information, but with the consumption chart showing in a bar-graph instead of a line-graph. See image below:
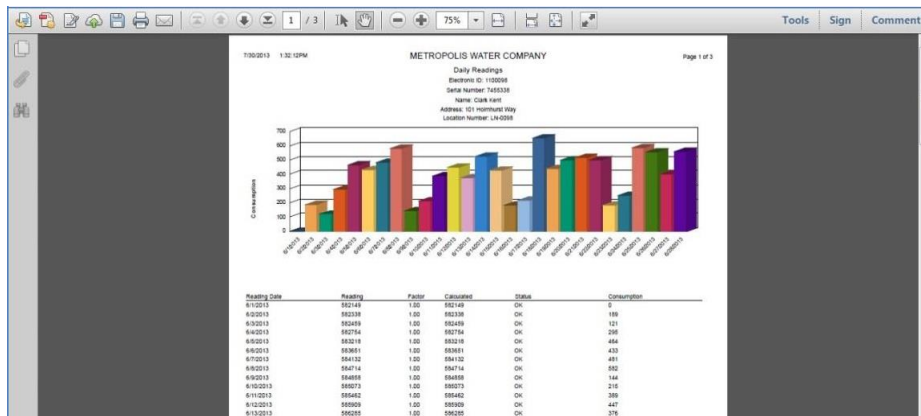
   As with any print-preview window within the **Consumer Portal**, you can print the report or save it to an Adobe® .PDF file on your computer.

- *Export to CSV/Excel:* This will download a Microsoft® Excel®-compatible .CSV spreadsheet file to your computer.

Graph Usage/Readings

In addition to the search results, you will see options in the margin above the upper-left corner of the screen to view either *Graph Usage* or *Graph Readings*.

| Daily Readings	Graph Usage		Graph Readings			
Reading Date Range From		4/27/2019		Through	5/27/2019	
Electronic ID:	1100733			Name:	Chas Andrade	
Serial Number:				Address:	622 Snyder Pl	
Average Consumption:	0			Search	Show Results in Grid ▾	

Selecting *Graph Usage* will bring up a graph such as the one below in your browser:

You will see the consumption information that was listed in the search results, on the previous screen, displayed in a data chart. You can select from the different *Chart Types* available and see the chart change to match.

The other option you have is to select *Graph Readings* to display the meter readings instead of consumption. See the image below:
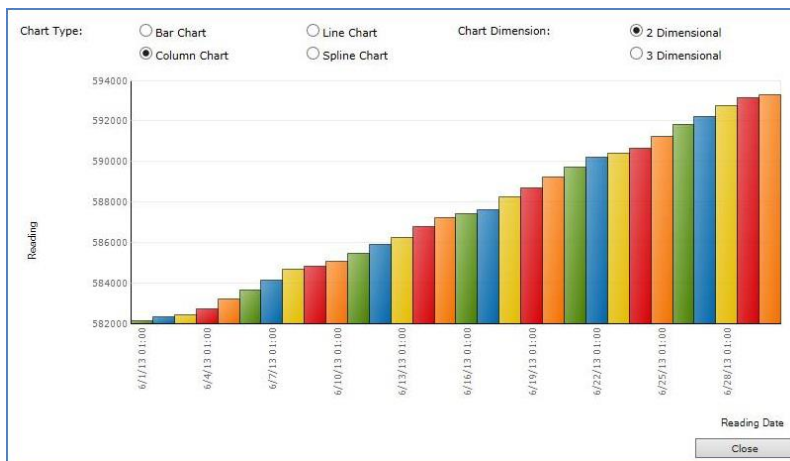
You also have the same *Chart Type* choices above as you did with the *Graph Usage* screen.
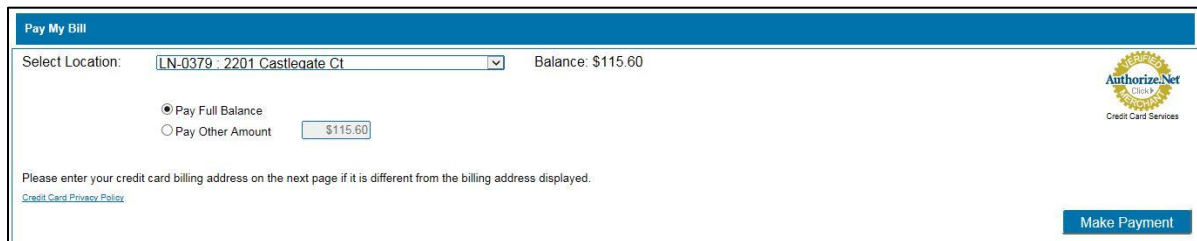
Chapter 7: Paying Your Bill Online

What to Know Before You Start

This selection will not display if your utility company does not offer this option.

How to Pay Your Bill Online

1. Select *Pay Bill* to pay your current account balance immediately.

Result: Your current account balance is listed to the right of the *Select Location* field.

2. If applicable, select the location you wish to pay.

3. Select whether you are paying the full balance or a different amount. If you select *Pay Other Amount*, enter the amount you wish to pay.

   Note: If your account balance is $0 (or less), the screen will default to Pay Other Amount, which will default to $0. If you wish to pay an additional amount on your account, enter the amount to pay.

4. Select *Make Payment*. This will transfer you to your utility company's payment gateway site.

5. Enter your credit card information on this site to complete your payment. Once your payment is completed, you will be returned to the **Consumer Portal**.

   Note: *It is important that you not interrupt this process for your payment to be recorded properly with your utility company.*

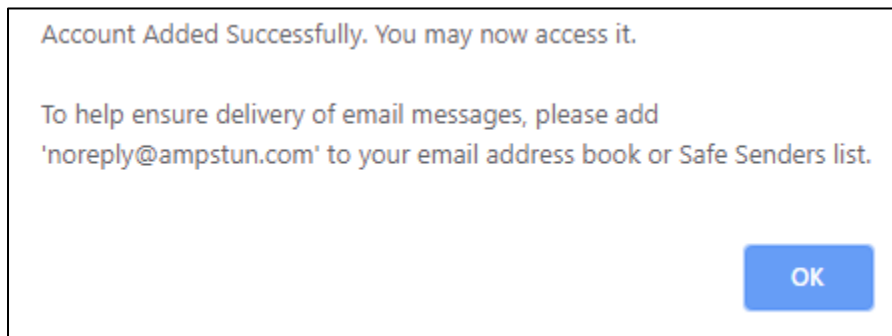# Chapter 8: Consumers with Multiple Accounts

What to Know Before You Start

- This chapter is only for those with multiple accounts such as landlords.

- Properties can only be linked to one account. Contact your utility company if you receive a message indicating that an online registration has already been completed for an account.

- If you receive a message when registering that the account is not found, try entering only the last and first name in last name, first name order.

- The *Consumer Customer Chooser* page will become your Welcome (Home) page once you register additional accounts. This cannot be changed if you have more than one account.

Consumer Register Another Account

1. Select *Consumer Register Another Account* from the main menu to register additional accounts.

2. Enter the account number as it appears on the bill in the *Account Number* field.

3. Enter the full name as it appears on the bill in the *Full Name on Bill* field.

4. Select the *Register* button to register the account.

   Result: You will receive the following message.

   Account Added Successfully. You may now access it.

   To help ensure delivery of email messages, please add 'noreply@ampstun.com' to your email address book or Safe Senders list.

   OK

5. If applicable, repeat Steps 2 through 4 to register another account.

Consumer Customer Chooser

1. Select *Consumer Customer Chooser* from the main menu to select the account that you wish to view.

2. Use the drop-down menu to select the account that you want to view.

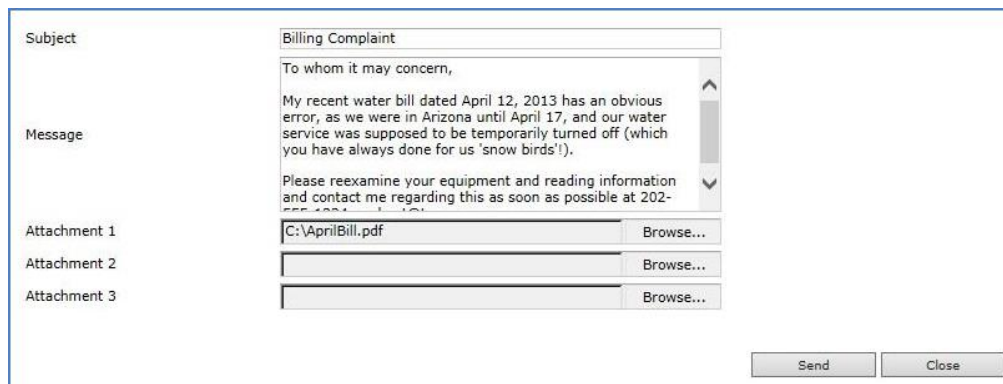| Select Account	
Select Customer:	AN-1756 - Andrade, Chas ▼
	Select

Chapter 9: Contacting Your Utility Office

What to Know Before You Start

This feature is available for:

- Contacting your utility company when it is outside their regular business hours.

- When the issue is fairly involved and may need a detailed explanation.

- You will want to add your utility company's email address to your email program's contact list or safe senders list, to make sure your computer's security software doesn't accidentally block your email notifications.

Contacting Your Utility Office

1. Select *Contact Us* from the main menu to send a message to your utility company.

2. Enter the *Subject* and *Message* just like you would with a regular email.

3. If applicable, add up to three attachments.

4. When finished, select the *Send* button.