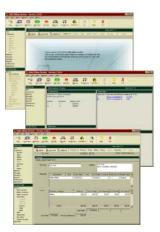## UBS Features...

Billing and Rates

UBS allows flexible and simple entry of all meter readings, including electronic meter download. An unlimited number of rates are available with flexible setup allowing for a tiered system.

New Information Center

In one glance get a summary of customer activity, receipts, open batches and penalties in the new Information Center page.

Setup Wizards

Utility Billing wizards guide you step by step through the process of adding customers, addresses, accounts, utilities, and more! No guessing on what information you need, or how to perform a step, Utility Billing leads you through it!

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The ease of Windows® with the power of an SQL compliant database!

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Accounts

- Create and link an unlimited number of accounts such as water, sewer, electric, irrigation, garbage collection, etc.
- Drop and drag sub account creation
- Maintain physical and mailing address
- Wizards aid in the creation of customer and account information
- Easily see all accounts that are attached to a customer
- View complete history in detail, summary or totals
- History is color coded for easy viewing
- Double click on a specific history total line to display detail
- Latest reading information easily accessible
- Quick view of current balance, charge, and payment
- Easily print individual histories
- Easily make adjustments to accounts
- Choose date from when to view history
- Maintain physical and multiple mailing addresses
- Store up to seven address lines to support foreign addresses
- Track subdivision, lot number, property tax ID, license number, social security number, section number, and date of birth for all accounts
- Easily determine if a reading is estimated
- Search by name, account number or street address
- Identify customer by custom defined types
- Track customer deposits
- Easily create multiple accounts for a customer and group all accounts for billing
- Alert Notes are available to store information and optionally pop up at various points
- Reminders may be entered by user to display during designated time periods
- Track services in use and available to an account

Call today for a demonstration of Utility Billing!

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Preferences
- Setup account number template to match office standard
- Design forms to fit current bills and notices or create new ones
- System terminology can be defined to match local terminology
- User Options for screen display

Rate Definitions
- Setup rates with easy-to-use wizards
- Easily change rates for existing utilities
- Unlimited number of rates for a utility
- Flexible rate setup allowing for a tiered rate system based on consumption, fixed amounts, and various calculation modes

Billing
- Automatic proration of rates when changed in mid cycle
- Full control of bill layout
- Ability to override billing amount
- Easily mark bill as Final within a batch or create a separate batch for Final
- Wizard easily corrects bills that were entered incorrectly
- Add specific notes to each batch
- Previous batches and actual bills are available for review
- Automatically prorate flat charges for partial periods

Receipts
- EFT debiting of customer's bank account
- Receipt field defaults to amount owed, but can be easily changed to reflect payment if different
- Distribution of payments can be customized, and then each receipt can be overridden for a minimum of key strokes
- Record receipt as Check, Cash, Money Order or Electronic Receipt
- Option to record customer check number
- Easily review previous receipt batches
- Ability to import electronic payments from another system or entity
- Support for custom calculations unique to a site
- Support using equivalences with rates

Meters
- Easily import and export meter readings from electronic reading devices
- Store meter serial number, ID, brand information, and radio information
- Track specific meter locations and installation dates with specialized notes
- Easily perform meter exchanges with Meter Exchange Wizard

Penalties
- Define conditions for penalties in accordance with office procedures
- Easily exempt payers from penalties
- Ability to penalize with separate rates for different services

Reports, Forms & Letters
- Design custom reports with the built-in Report Designer
- Standard reports include audit, transaction detail, summary trial balance, final balance, deposit listing, and street index
- Create customized address labels or use one of over 120 pre-defined Avery® labels
- Meter reader post card layout
- Preview reports before printing
- Easily customize forms
- Examine groups of accounts for review or letters
- Create templates for mail merge letters
- Letters are stored with a customers account and can be viewed online at any time
- Assign specific printers for different reports or notices

Other Features
- Supports "De-regulation"
- Work orders may be created, scheduled, printed, and tracked
- Meter inventory system
- Local street address index
- User defined attributes can be assigned to account and meter types for reporting purposes
- On line Help system
- "How To" menu guides
- Ability to add local processes to the Help system
- Screen level security
- Export data to other applications
- Create up to 40 user-defined fields for data entry and letter creation
- Runs on Windows 98/2000/XP/2003

Call today for a demonstration of Utility Billing!