# **Solar Net Metering Billing Setup Instructions**

These instructions outline the general steps to set up solar net metering billing. For questions, please contact NDS Technical Support at 800-649-7754 or support@ndsys.com.

#### **General Steps**

- 1. If you are setting up net metering billing for the first time, you will need to create the Billing Type, Rate table, Transaction Code and Transaction Profile (Step 1, a-d). Once they are set up, you only need to perform Step 2 to set up a net metering account.
  - a. Create a GENERATE Billing Type for generating net metering billing credits.
  - b. Create a rate table with the rates used for calculating net metering credits.
  - c. Create a transaction code for generating solar net metering billing credits.
  - d. Create the Billing Transaction Profile and add the net metering credits transaction code to it.
- 2. Use the Create Service Connection wizard to create the net meter credit meter or trailer, assign it to the account and specify the connection as a solar meter or trailer.

#### Notes:

- EDIFICE requires 2 readings to calculate net metering credits. This means the customer must have a meter with 2 reading dials or they must have 2 meters attached to the location. If the customer has a meter with 2 dials and 2 readings, then you can set up a trailer attached to the customer's meter. If the readings come from 2 meters, then you can create a new meter and assign the customer's usage meter as the parent connection. See the Create Service Connection step for more information.
- A Service Connection that is assigned the Generate Billing Type will not calculate a discount for tabled transaction codes.
- Please see the Appendix for examples of net metering rate structures, a Billing Edit Journal with net metering credits, and a customer bill with net metering credits.

### **Create a Net Metering Billing Type**

Use the Billing Type Maintenance routine to create a new billing type for Net Metering billing.

Go to File Maintenance  $\rightarrow$  Table Maintenance  $\rightarrow$  Billing Tables  $\rightarrow$  Billing Type Maintenance. A screen similar to below displays.

Billing Type Maintenan	nce	×
Eile		
	Billing Type: GENERATE GENERATE Retrieve	
Description Type Usage Format Usage Table ID Memo	NET METERING Generate number 11.0	

To build the Billing Type:

- Enter GENERATE as the Billing Type.
   Tip: You can assign a different ID for the Billing Type. However, it may be easier to identify if you use GENERATE.
- 2. Click Retrieve.
- 3. Enter **NET METERING** as the description.
- 4. Select **Generate** as the Type.
- 5. Click **Save** to complete the entries.

### **Create the Net Metering Rate Table**

Use Rate Table Maintenance to create the rate table that contains the rates for calculating net metering credits.

Go to **Daily Work**  $\rightarrow$  **File Maintenance**  $\rightarrow$  **Code Maintenance**  $\rightarrow$  **Rate Table Maintenance** and the following screen displays.

⊻iew					
	R	n <b>te ID:</b> 017	Searce Re <u>t</u> rie	e :h ve	
Title:	NET METER CREI	2			
Description:	NET METERING	REDIT			
	Usage Level	Rate		Usage Level	Rate
Row 1:	0	0.0961000	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
		0.0000000	D 04		0 000000

Enter the following:

- 1. Assign an ID for the rate table.
- 2. Click Retrieve.
- 3. Enter **NET METER CRED** for the title.
- 4. Enter **NET METERING CREDIT** for the description.
- 5. Enter the rates for net metering.
- 6. Click Save to save your entries.

#### **Create the Net Metering Billing Transaction Code**

Use Transaction Code Maintenance to create the billing transaction code used for generating solar/net meter billing credits.

Go to **Daily Work**  $\rightarrow$  **File Maintenance**  $\rightarrow$  **Code Maintenance**  $\rightarrow$  **Transaction Code Maintenance** and the following screen displays.

ansaction Code Mainten	ance					
e <u>A</u> dditional						
		Transaction Code ID:	Search Retrieve			
Rate Code: Rate Table No.: Demand Table No.:		G/L Debit Account:		Discount Multiplier: Discount Type: Discount Step 1 Cap:	0.00000 Default Default	<b>•</b>
Pinance Table ID: Power Factor ID: Description:	Net Meter Credit	Midel Min Charge: Model Min Charge: Model Min Usage: Minimum Charge:		Prorate Calculations: Prorate Over Min:	Default Default	•
Transaction Type: Debit/Credit: Budget Type:	Billing Entry  Credit Non-Budget	Minimum Usage: Old Minimum Charge: Old Minimum Usage:	0.00	Reason Type: Message Type: Customer Status:	Default Default Default	•
Service Code: Special Handling: Calculation Types:	1 - Electric       None       1 - Table	This Year Usage: This Year Amount:	0.00	Credit Message Type: Discontinued: Prevent Zero \$ Import:	None No No	* * *
Tax Code:	No 🔽	Last Year Usage: Last Year Amount:	0 0.00	Lien Allow: Roll Allow:	Default Default	•
Billing Code: Cash Code:	Default	Analysis Flag: Charge Multiplier: Calculation Multiplier: #Decimal Places:	0 1.0000000 0.0000000 0	Finance Allow: Shut Off Allow: Past Due Allow: Collection Allow:	Default Default Default Default	* * *
Age Category: Age: Reversal Age:	Default   Default	Effective Date: Termination Date:				

To build the transaction code, enter:

- Transaction Code ID: Enter an ID for this transaction code.
- Click Retrieve.
- Rate Code: Enter NMC as the abbreviated description to use for the rate code.
- Rate Table No.: Enter the ID for the net meter rate table. In this example: 017
- **Description**: Enter **NET METER CREDIT** as the description.
- Transaction Type: Select Billing Entry as this transaction code is used for billing.
- Debit/Credit: Select Credit.
- Service Code: Select the service code for electric.
- Special Handling: Select None.
- Calculation Types: Select 1 Table to indicate a table is used for calculating the billing transaction.
- Billing Code: Leave this field set to default.
- Click **Save** to complete the entries.

### **Create the Billing Transaction Profile**

Create the billing transaction profile for generating net meter credits. The profile contains the billing transaction code for generating billing credits for net meters.

Go to Daily Work  $\rightarrow$  File Maintenance  $\rightarrow$  Service Profiles  $\rightarrow$  Billing Transaction Profiles. The following screen displays.

Billing Profile Maintenance	×
Billing Profile ID     NETCRDT     Search       Service Code     01     Retrieve	
Description Net Meter credit	
Memo	
Transaction Codes	<u> </u>
719	
	i .

- Enter NETCRDT for the Billing Profile ID.
   Tip: You can assign a different ID for the Billing Profile ID. However, it may be easier to identify if you use NETCRDT.
- 2. Enter the appropriate service code.
- 3. Click **Retrieve**.
- 4. Enter **NET METER CREDIT** as the description.
- 5. Enter the Transaction Code that is your net meter transaction code. In this example: **719**.
- 6. Click **Save** to complete your entries.

#### **Create a Service Connection for the Account**

Use the Create Service Connection Wizard to create a service connection that contains the net metering credit meter or trailer, as well as, the other net metering information that is needed including the Billing Type and the Transaction Profile. As a step during the Create Service Connection Wizard, you can open the Create Meter Wizard (or Create Trailer Wizard) to create a credit meter that will be used to track the usage and to calculate the solar credit. In the example below *16657S* is the credit meter. You will also assign the account's usage meter as the Parent Connection ID for this service connection, which in this example is Meter *16656S*. If you are adding a meter, you may find it handy to assign a meter ID that is the same as the customer's usage meter with the exception of 1 character. For example, if the customer's usage meter is 1234, then assign the credit meter as 1234G.

#### Notes:

- EDIFICE requires 2 readings to calculate net metering credits. This means the customer must have a meter with 2 reading dials or they must have 2 meters attached to the location. If the customer has a meter with 2 dials and 2 readings, then you can set up a trailer attached to the customer's meter. If the readings come from 2 meters, then you can create a new meter and assign the customer's usage meter as the parent connection.
- The instructions below are for adding a credit meter. The instructions for adding a trailer are similar, with the exception that you will select Trailer as the Reference Type and then use the Create Trailer Wizard.

Go to the **Customer Inquiry**, expand the Create Wizard menu and select **Service Connection**. A screen similar to below displays.

Wizard		
Steps	Edit the Information to Describe the New Connection	1: Choose Location ID
1: Choose Location ID 2: Specify Information		Location ID 000029893000
3: Specify Information (Cont.)		3: Specify Information (Cont.)
4: Billing Information		4: Billing Information
4: Billing Information	Reference Type Meter Reference ID 16657S Reference Serial ID Primary Service Code 1 - LIGHT Billing Type ID GENERATE Parent Connection ID 16656S M	4: Billing Information
The Reference ID and Type describes the type of Service Connection to be billed. A Reference ID that currently exists on the system may be selected or a New Reference ID may be created.		
	<u>B</u> ack	

Enter the following:

- 1. Enter the Location ID.
  - Note: If a location is displayed in the Customer Inquiry, then Location ID defaults to that location.
- 2. Click Next.
- 3. Select **Meter** as the Reference Type.
- 4. Enter the solar credit meter ID in the Reference ID field. In this example, 16657S.
- 5. Next, click **Wizard** to open the Create Meter Wizard and create the credit meter. The following window displays.

Wizard		
Steps	Enter the New Meter Inventory ID	1: Enter ID
1: Enter ID		2: Specify Information
2: Specify Information		
	Mater Inventory	
	Interest Inventory 166575	
Narrative	_	
Enter a Meter ID that does not		
exist on the system currently.		
	Back <u>N</u> ext	

- a. The Meter ID entered on the previous window is automatically displayed.
- b. Click Next.
- c. Enter the primary service code.
- click Finish to complete the credit meter entries and return to the Create Service Connection wizard.
   Note: If you need to enter additional meter information, click Fast Access Maintenance + to access Meter Maintenance and enter any additional information. When finished, click Save to close the screen and return to the Create Service Connection wizard.
- 6. Select the primary service code for the connection.
- 7. **IMPORTANT:** Enter **GENERATE** as the Billing Type ID.
- 8. Enter the customer's usage meter as the Meter ID to assign as the Parent Connection ID. **Note:** In this example the parent meter is *16656S* and the credit meter is *16657S*.
- 9. Click **Next** to continue.
- 10. Enter a usage multiplier if needed. **Tip:** You may need a usage multiplier depending on how the connection readings are coming into EDIFICE.
- 11. Click Next to continue to the next screen.
- Enter NETCRDT for the Billing Transaction Profile ID.
   Note: This is the Billing Transaction Profile that contains the net metering Transaction code.
- 13. Click Finish to complete the wizard and save your entries.

## View Account in Customer Inquiry when Set Up

The customer account should look similar to below when you are finished.

💈 Utilities Billing WorkBench {Mansfield} - [Inquiry]		_ 8 ×
É Elle View Daily Work Reports Analysis Period End Work Processes Service Management Tools Utilities	Images Windows Help Web Links	<u>-9×</u>
Inquire Location Location 000029893000	Customer ID: 000029893000	
	Balances Credit Messages Service St	atus
	Billing Summary Tran. Summary Cust User Def Info	rmation
Owner 000029893000 🖏 VAM REALTY TRUST Active	Note:	
Lienable Allow Finance Finance Period Company Number Rate Class	ELC Tot	al
Tredit Bating Score	+ Total Charge 0.00	0.00
Store Strength Store	Intal Finance     U.00	0.00
Billing Address	Total Palance 0.00	0.00
241 FRANCIS AVE Parent Meter	Lact Day Amount: 60/4/25	6044.25
MANSFIELD, MA 02048-5059	Last Pay Amount. 0044.55	0044.55
Billing Type ID Usage Multiplier Rea Zone	Discount Amount: 0.00	0.00
	Discount Date: 07/13/2012	
Ouiside identifier Sequence rode Create iviceer ine in	Discount Balance: 0.00	0.00
Location	Loan Balance: 0.00	0.00
ID Type Reading Date Usage Tran. Profile ID	🛨 Lien Total: 0.00	0.00
H     16656S     + M     7237     062002012     0     000000000040 +	Prev Lien Total: 0.00	0.00
Billing Type ID Jsage Multiplier Reading Multiplier Pressure Long		•
GENERATE - 100.0000 - 0	Wizards Book Sequence Picture	
o dance section of the section of th		
Location	Create	
ID Type Reading Date Usage Tran. Profile ID	Edit	
Ide575     M     S390     O5/23/2014     O     NETCRDT +     Ideas     Multiplier     Reading Multiplier	Customer Information	
1T + 160.00000 0	Customer Service	
Outside Identifier Sequence Code Supplier ID Line ID	N <sub>bet</sub> Customer Note	
Prior ID Prior Type Pending Unbilled Usage		
16134*'0000001 T 0	Customer Alert	
	User Definable Customer Fields	
ID         Type         Reading         Date         Usage         Tran. Profile ID	User Definable Location Fields	
Total: \$0.00	Silling Information	
Exit Wizard		

## Appendix

## Example Rates & Tariff Net Metering Structure

Billed Usage	Billing Units	Charge/(Credit)
		\$7.00
49,280	KWh	\$4,735.81
230.56	kW	\$2,974.22
(33,440	kWh	(\$3,213.58)
230.56	kW	\$265.14
		\$498.89
		(\$647.87)
Bill Total		\$4,619.60
		Read Date
ading	07237	02/24/2016
Reading	07545	03/19/2016
	308	
er	160	
Wh	49,280	
ading	05390	
Reading	05599	
neuung	209	
er	160	
d kWh	33.440	
d Reading	1.441	
er	160	
Demand	230.560	
emand	230.560	
	Billed Usage 49,280 230.56 (33,440 230.56 Bill Total Bill Total eading ier Wh eading ier d kWh d Reading ier Demand	Billed UsageBilling Units49,280KWh230.56kW(33,440kWh230.56kWBill Total07237Reading07545308160Wh49,280eading05390c Reading05390c Reading05599209209ier160Mh33,440d Reading1.441ier160Demand230.560

## Example Billing Edit Journal with Net Meter Solar Credits

Billing	EDIT Tran	isaction Jour	nal				
Date: 06/06/2016 3:16 PM User Name: Northern Data Systems User Login: nds							
Billing	EDIT Tran	isaction Jour					
- Book/Seq # Location ID Customer ID Name Svc Tran Cd Rate Description Prior Read Present Read	Usage	To Date Prior Usage	Class Company Charges	Service Tax	Location Discount	Total User	
0009-67.85         000906785100         000906785116         NORTHERN         DATA         SYS           1         717         LT         LT         GEN         7237         7545           1         720         LT         LT         CUST         CHG         0         0           1         719         NMC         NET         METER         CR         5390         5599           1         731         LT         LT         DIST         DEMA         0         1441           1         730         LT         NET         MET         0         0           1         101         DIS3         DISCOUNT         0         0         0	49280 0 -33440 230560 230560 0	03/30/2016 0 0 0 0 0 0 0	1 1 4735.81 7.00 -3213.58 2974.22 265.14 -647.87	36 RT. 1 295.99 0.44 0.00 185.89 16.57 0.00	0.00 0.00 594.84 53.03 0.00	5031.80 nds 7.44 nds -3213.58 nds 2565.27 nds 228.68 nds -647.87 nds	
Customer Totals	15840	0	4120.72	498.89	0.00	4619.61	
GRAND TOTALS 15840 0 4120.72 498.89 0.00 4619.61 Total Accounts 1							
Totals Book #: 510 Service #: 1 476960 0 4120.72 498.89 647.87 3971.74							
Totals Service #: 1	476960	0	4120.72	498.89	647.87	3971.74	

## **Example Bill with Net Meter Credits**

362 RT 1			06/04/16	
			4619.61	
CRS PROPERTIES 362 RT 1 FALMOUTH, ME 04105				
CRS PROPERTIES	362 US RT 1		000029893000 3 06/	04/16
06/20/2012 05/31/2014 05/23/2014 05/31/2014	16656S 16657S	723 539	7 7545 49280 0 5599 -33440	710
461120 15840	160.00000		PAYMENTS SINCE LAST BILL BALANCE FORWARD	6044.35 0.00
		0.00	LT GEN LT CUST CHG	4735.81
		0.00	Net Meter Credit LT DIST DEMAND Net Mtr Rec Surcharge DISCOUNT	-3213.58 2974.22 265.14 -647.87
		0.00	TOTAL TAX TOTAL GROSS TOTAL DISCOUNT TOTAL NET	498.89 4619.61 0.00 4619.61
		0.00		
	Weinforden (11 million in 12 million in 12		<ul> <li>A set of of the set of the set</li></ul>	2 