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 → Table Maintenance → Billing Tables → Billing Type Maintenance.** A screen similar to below displays.

To build the Billing Type:

1. 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** → **File Maintenance** → **Code Maintenance** → **Rate Table Maintenance** and the following screen displays.

Rate Table Maintenance

File   View

Rate ID:

017

Save
Search
Retrieve

Title: NET METER CRED

Description: NET METERING CREDIT

	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
Row 12:	0	0.0000000	Row 24:	0	0.0000000

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 → File Maintenance → Code Maintenance → Transaction Code Maintenance** and the following screen displays.

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 → File Maintenance → Service Profiles → Billing Transaction Profiles**. The following screen displays.

1. 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.

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.
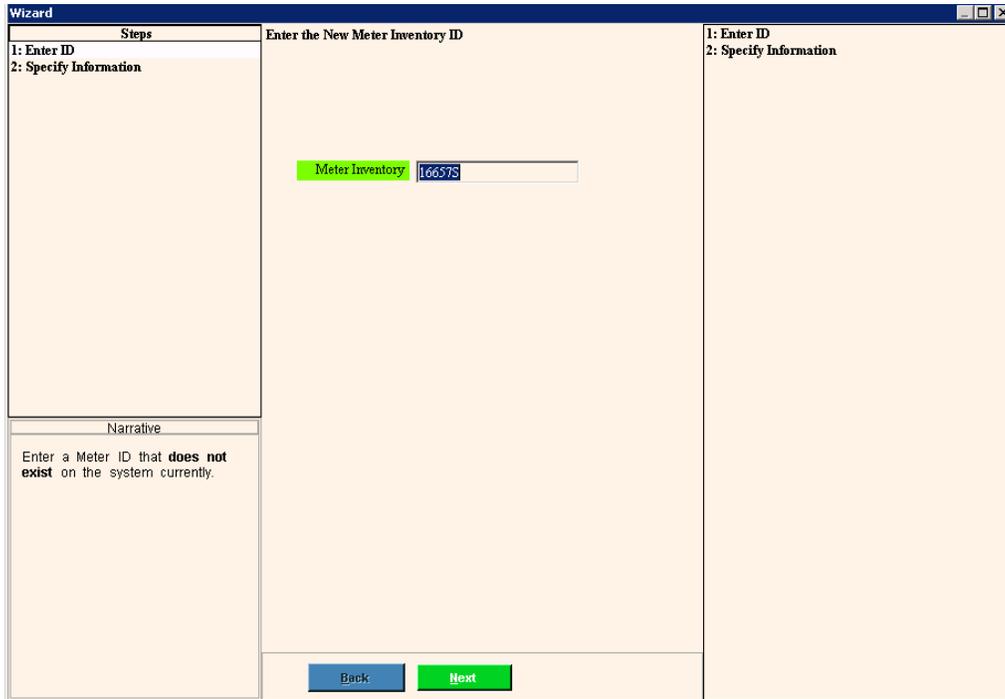
a. The Meter ID entered on the previous window is automatically displayed.
b. Click **Next**.
c. Enter the primary service code.
d. Click **Finish** to complete the credit meter entries and return to the Create Service Connection wizard.

   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.
12. 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.

Appendix

Example Rates & Tariff Net Metering Structure

	Rate	Billed Usage	Billing Units	Charge/(Credit)
Customer Charge *				$7.00
Generation Charge *	$.0961	49,280	KWh	$4,735.81
Distribution Demand Charge * +	$12.91	230.56	kW	$2,974.22
Net Metering Credit	$.0961	(33,440	kWh	($3,213.58)
Net Metering Recovery Surcharge * +	$1.15	230.56	kW	$265.14
6.25% Tax (Items with *)				$498.89
Early Pymnt Discount (Items with +)				($647.87)
		Bill Total		**$4,619.60**

				Read Date
Energy Delivered to Customer (kWh delivered)	Prior Reading		07237	02/24/2016
	Current Reading		07545	03/19/2016
	Usage		308	
	Multiplier		160	
	Billed kWh		**49,280**	
Energy Received from Customer (kWh received)	Prior Reading		05390	
	Current Reading		05599	
	Usage		209	
	Multiplier		160	
	Credited kWh		**33,440**	
Demand Reading	Demand Reading		1.441	
	Multiplier		160	
	Actual Demand		**230.560**	
	Billed Demand		**230.560**	

Example Billing Edit Journal with Net Meter Solar Credits

```
                              Billing EDIT Transaction Journal

                                Date: 06/06/2016 3:16 PM
                              User Name: Northern Data Systems
                                   User Login: nds


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                              Billing EDIT Transaction Journal

Book/Seq #   Location ID  Customer ID  Name                   To Date    Class Company Service Location
Svc Tran Cd Rate Description    Prior Read Present Read    Usage Prior Usage   Charges      Tax   Discount      Total User
-------------------------------------------------------------------------------------------------
0009-67.85    000906785100 000906785116 NORTHERN DATA SYS       03/30/2016  1     1       36 RT. 1
1   717      LT    LT GEN          7237        7545     49280        0     4735.81    295.99      0.00     5031.80 nds
1   720      LT    LT CUST CHG        0           0         0        0        7.00      0.44      0.00        7.44 nds
1   719      NMC   NET METER CR    5390        5599    -33440        0    -3213.58      0.00      0.00    -3213.58 nds
1   731      LT    LT DIST DEMA       0        1441    230560        0     2974.22    185.89    594.84     2565.27 nds
1   730      LT    NET MTR REC        0        1441    230560        0      265.14     16.57     53.03      228.68 nds
1   101      DIS3  DISCOUNT           0           0         0        0     -647.87      0.00      0.00     -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      16656S       7237          7545      49280        710
05/23/2014 05/31/2014      16657S       5390          5599     -33440


                                          PAYMENTS SINCE LAST BILL   6044.35
     461120      15840    160.00000       BALANCE FORWARD               0.00


                                          LT GEN                      4735.81
                                   0.00   LT CUST CHG                    7.00
                                          Net Meter Credit           -3213.58
                                          LT DIST DEMAND              2974.22
                                          Net Mtr Rec Surcharge        265.14
                                   0.00   DISCOUNT                    -647.87

                                          TOTAL TAX                    498.89
                                          TOTAL GROSS                 4619.61
                                   0.00   TOTAL DISCOUNT                 0.00
                                          TOTAL NET                   4619.61

                                   0.00
```