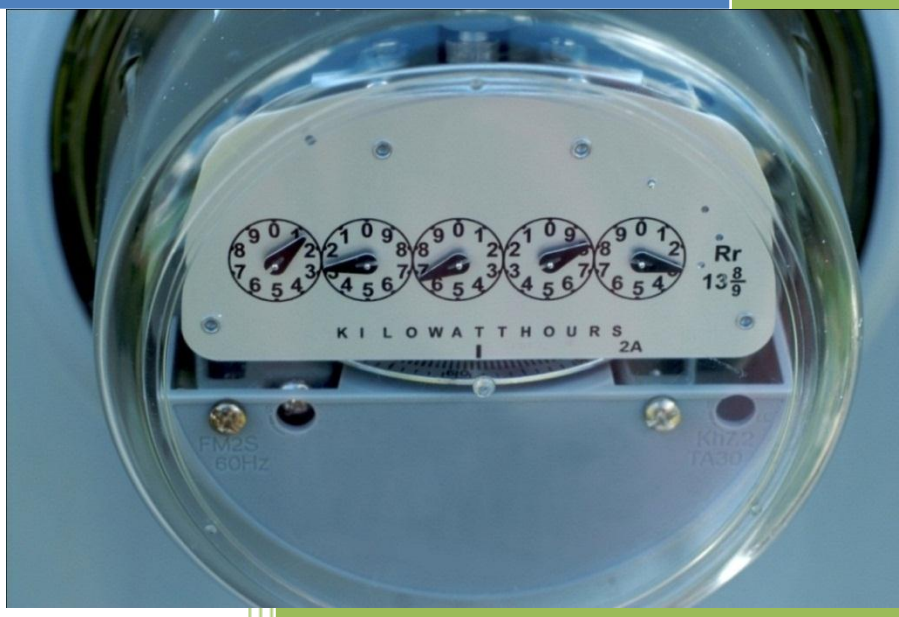
5.0 User Guide

C/S Utility Tracking Manager



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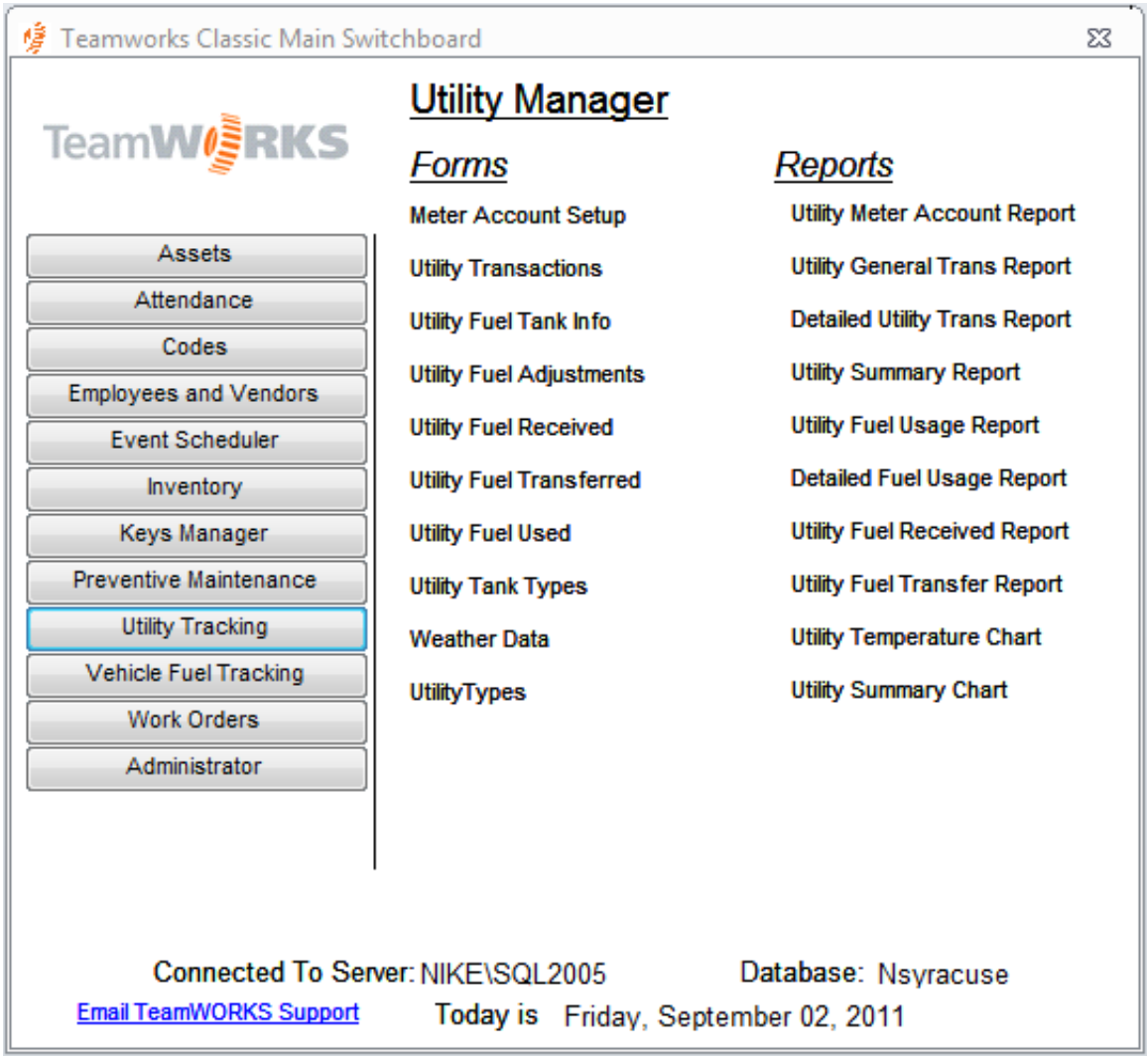
Utility Manager

The Utility Tracking module allows you to track various costs for Electricity, Water, Natural Gas and other various utilities to name a few. If you provide the Location Information for SQF and number of occupants, then costs can be broken down into cost/sqft and cost/student, making for more meaningful reporting. In addition to tracking utility costs, tracking onsite fuel tank levels and consumption can be accomplished using this module.



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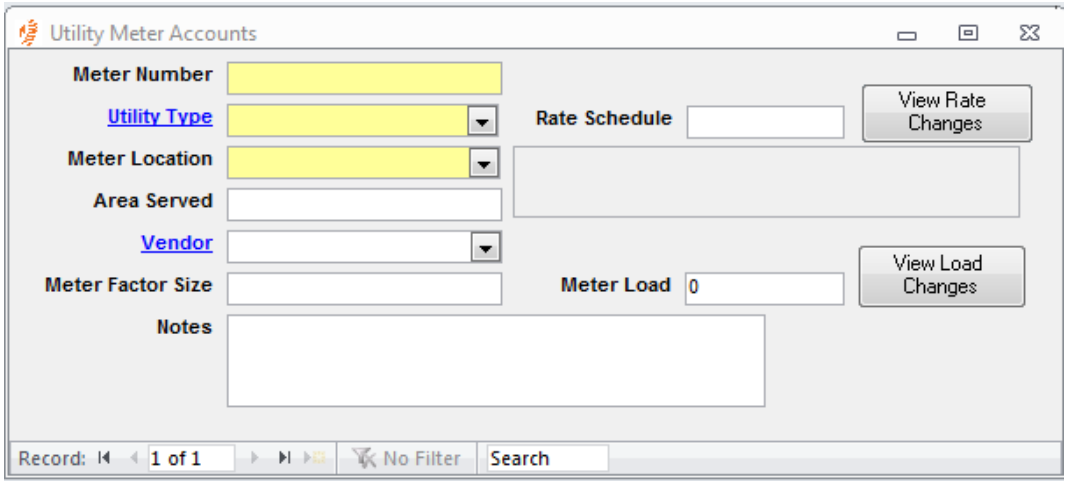
Meter Account Setup



Meter accounts for each metered utility will need to be set up prior to creating utility transactions. The only required fields on this form are meter number, utility type and meter location. First, enter the Meter Number for this specific meter. It must be a unique number. Any location can have multiple meters. You should create a meter account for each bill you receive from your utility company.

Meter Number – enter the number for the meter for which you will be entering transactions (bills information).

Utility Type – select the type of utility for the specified meter.

Meter Location – select from the list of paths where this meter services.

Area Served – enter the area for which this meter services such as 'Main Building' or '123 Main Street facility' or 'portables'.

Vendor – select the name of the vendor that provides this utility type. If the vendor is not on the list, click on the Vendor link to open up the Main Vendor form. You must have rights to access the vendor form.

Meter Factor Size – enter the factor meter information here.

Notes – enter 'generic' notes or information regarding anything on this specific meter.

Rate Schedule – enter the type of rate schedule applicable for this meter.

View Rate Changes – click this button to view any rate changes you have made on this specific meter.

Meter Load – if you wish to track your highest peak loads, you can enter those here.

View Load Changes – view historical load changes using this button.

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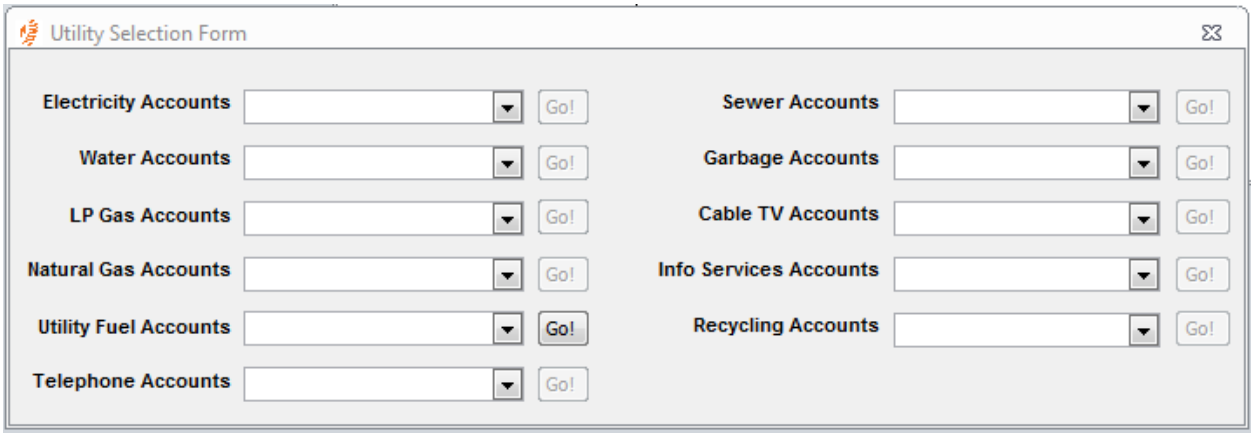
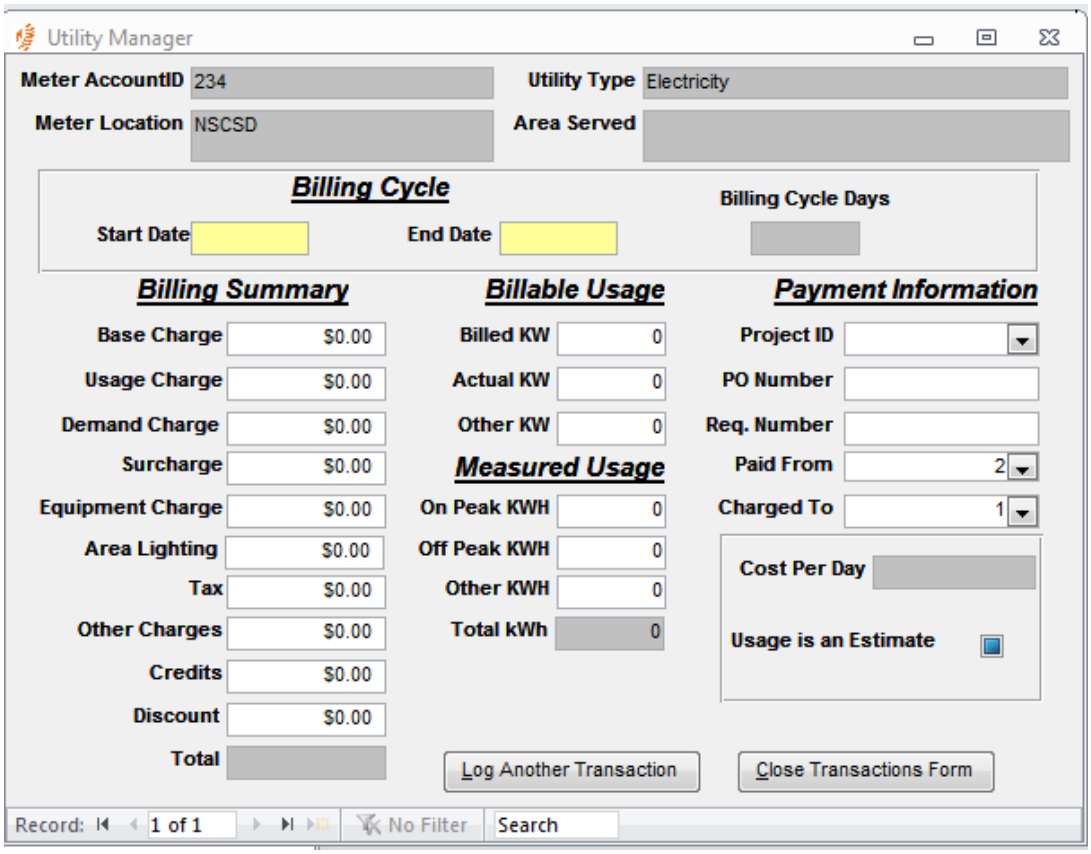
Utility Transactions



When ready to enter a transaction, enter or select from the appropriate list with the meter account number for which you will be entering a transaction then click the Go button.

Electrical Transaction Form



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When entering an electric bill, simply take the information from your paper bill and enter the data directly into the appropriate fields. The paper bills and the form data will not match. You can enter the 'bottom line' charge as the Base charge if you do not care to itemize your data such as Usage Charge, Demand Charge, etc.

Billing Cycle

- Start Date – Enter the start day for this billing cycle (Double click field for a Calendar).
- End Date – Enter the end date for this billing cycle (Double click field for a Calendar).
- Billing Cycle Days – this field will calculate the number of days in the billing cycle based on Start and End Dates provided.

Billing Summary

- Base Charge – enter the base charge for your electric bill.
- Usage Charge – enter your usage charge for your bill.
- Demand Charge – enter any demand charges on your bill.
- Surcharge – enter any surcharges you bill may reflect.
- Equipment Charge – enter any equipment charges your bill may reflect.
- Area Lighting – enter any charges for area lighting.
- Tax – enter your tax assessed for this bill.
- Other Charges – enter any other charges you may have incurred.
- Credits – enter any credits on your bill.
- Discount – enter any discounts on your bill.
- Total – this field will auto calculate based on the values entered in the Billing Summary.

Billable Usage

- Billed KW – enter the billed KWh listed on bill.
- Actual KW – enter the actual KWh listed.
- Other KW – enter any other billed KWh here.

Measured Usage

- On Peak KWh – list usage for on peak.
- Off Peak KWh – list usage for off peak.
- Other KWh – list any other usage for KWh usage.
- Total KWh – this field will auto calculate based on the KWh's entered in the previous fields.

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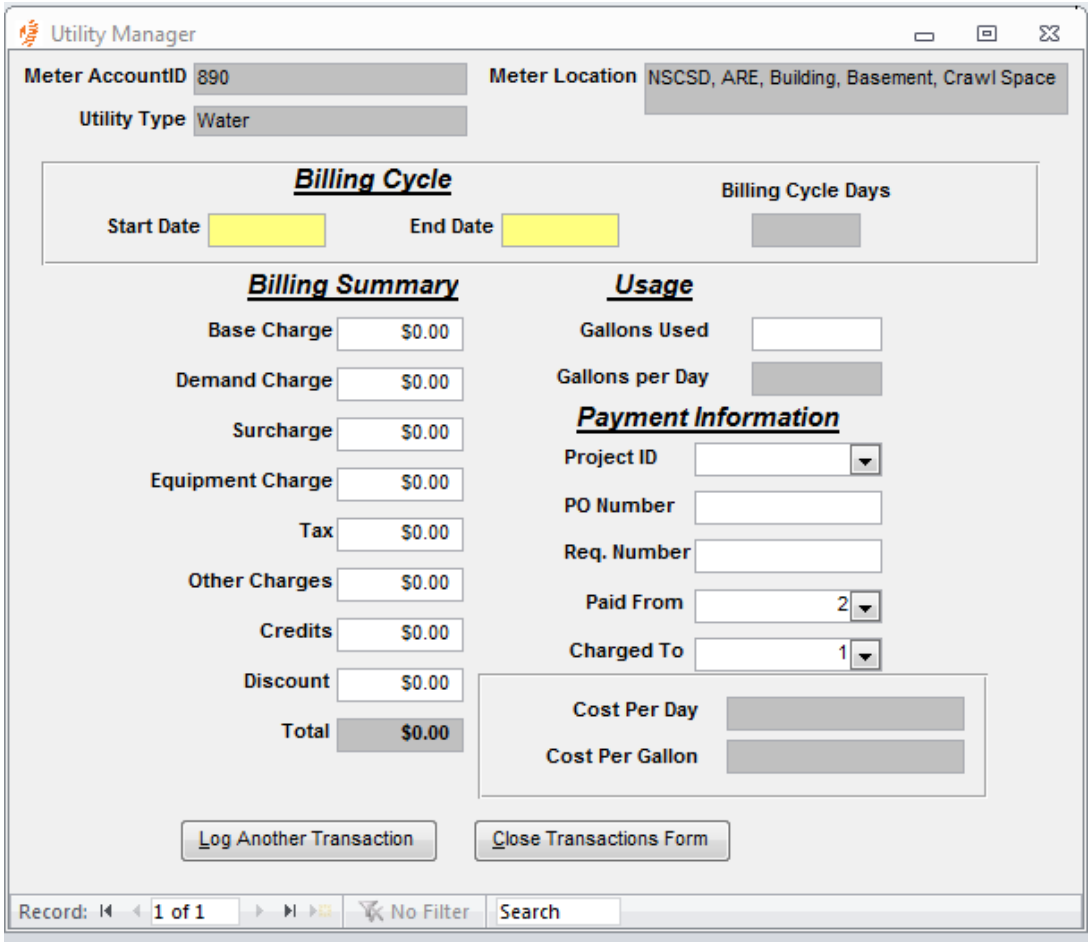
Payment Information

- Project ID – enter or select the Project ID for this electric bill.
- PO Number – enter the PO number used for this electric bill.
- Req. Number – enter the Requisition Number for this bill.
- Paid From – enter or select the Account this bill will be paid from.
- Charged To – enter or select the Account this bill will be charged to.
- Cost Per Day – this field will calculate based on Total Cost / Billing Cycle Days.
- Usage is an Estimate – check this field if the bill indicates this bill is an estimate. Utility companies my use an estimate for various reasons.
- Log Another Transaction – clicking this button will close the existing Electrical Transaction Form and open the Utility Selection form.
- Close Transactions Form – clicking this button will close the current Electrical Transaction Form as well as the Utility Selection form.

Water Transaction Form



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Billing Cycle

- Start Date – enter the first date of the current billing cycle indicated on the bill. Double click the date field to open a calendar view.
- End Date – enter the last date of the billing cycle indicated on the bill. Double click the date field to open a calendar view.
- Billing Cycle Days – auto-calculated field based on End and Start dates entered.

Billing Summary

- Base Charge – enter the base charge for your current bill. Many customers enter the 'bottom line' here and choose not to itemize the bill.
- Demand Charge – enter the demand charge for the current bill.
- Surcharge – enter any surcharges for the current bill.
- Equipment Charge – enter any equipment charges for the current bill.
- Tax – enter any taxes for the current bill.
- Other charges – enter any other or miscellaneous charges for the current bill.
- Credits – enter any credits shown on the current bill.
- Discounts – enter any discounts shown on the current bill.
- Total – auto-calculated field based on values entered in the previous fields.

Usage

- Gallons Used – enter the total number of gallons used as indicated on the bill.
- Gallons Per Day – auto-calculated field showing the number of gallons used per day based on Gallons Used/Billing Cycle Days.

Payment Information

- Project ID – enter or select the Project ID for this water bill.
- PO Number – enter the PO number used for this water bill
- Req. Number – enter the Requisition Number for this bill
- Paid From – enter or select the Account this bill will be paid from.
- Charged To – enter or select the Account this bill will be charged to.
- Cost Per Day – this field will calculate based on Total Cost / Billing Cycle Days.
- Cost Per Gallon – this field will calculate based on Total Cost/Gallons Used.
- Log Another Transaction – clicking this button will close the existing Water Transaction Form and open the Utility Selection form.
- Close Transactions Form – clicking this button will close the current Water Transaction Form as well as the Utility Selection form.

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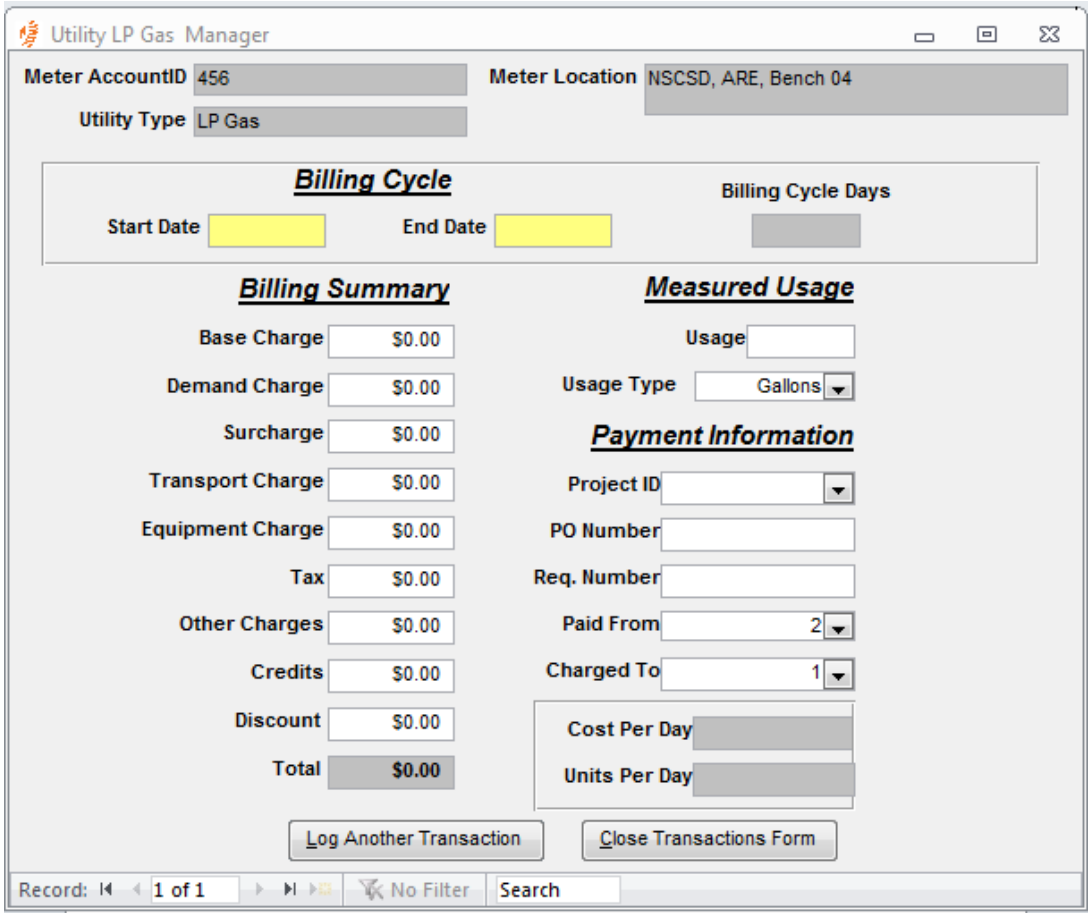
LP Gas Transactions



Billing Cycle

- Start Date – enter the first date of the current billing cycle indicated on the bill. Double click the date field to open a calendar view.
- End Date – enter the last date of the billing cycle indicated on the bill. Double click the date field to open a calendar view.
- Billing Cycle Days – auto-calculated field based on End and Start dates entered.

Billing Summary

- Base Charge – enter the base charge for your current bill. Many customers enter the 'bottom line' here and choose not to itemize the bill.
- Demand Charge – enter the demand charge for the current bill.
- Surcharge – enter any surcharges for the current bill.
- Transport Charge – enter any transport charges shown for the current bill.
- Equipment Charge – enter any equipment charges for the current bill.
- Tax – enter any taxes for the current bill.
- Other charges – enter any other or miscellaneous charges for the current bill.
- Credits – enter any credits shown on the current bill.

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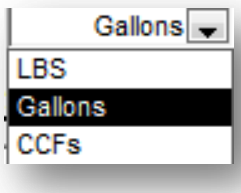
- Discounts – enter any discounts shown on the current bill.
- Total – auto-calculated field based on values entered in the previous fields.

Measured Usage

- Usage – enter the number of units used as indicated on the bill.
- Usage Type – enter the type of unit for this bill. Options are LBS, Gallons and CCFs.



Payment Information

- Project ID – enter or select the Project ID for this water bill.
- PO Number – enter the PO number used for this water bill.
- Req. Number – enter the Requisition Number for this bill.
- Paid From – enter or select the Account this bill will be paid from.
- Charged To – enter or select the Account this bill will be charged to.
- Cost Per Day – this field will calculate based on Total Cost / Billing Cycle Days.
- Units Per Day – this field will calculate based on Total Cost/Usage.
- Log Another Transaction – clicking this button will close the existing Transaction Form and open the Utility Selection form.
- Close Transactions Form – clicking this button will close the current Transaction Form as well as the Utility Selection Form.

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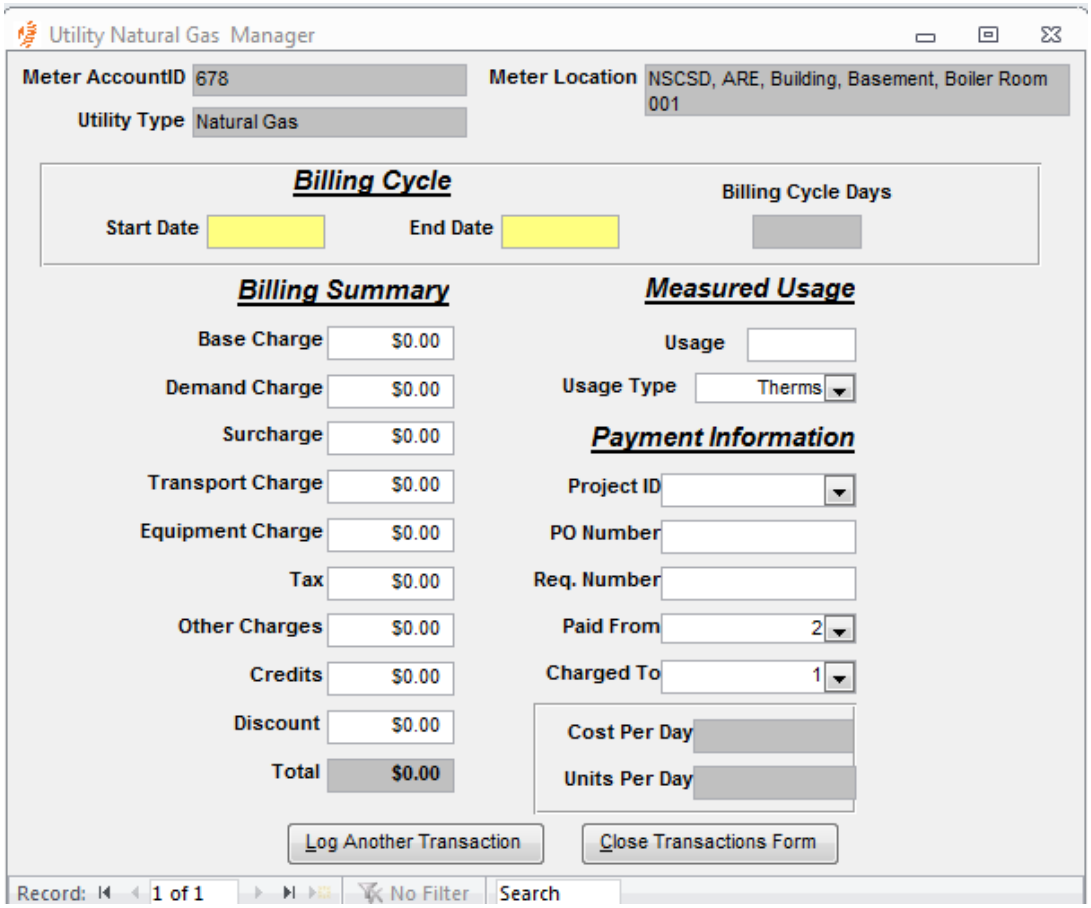
Natural Gas Transactions



Billing Cycle

- Start Date – enter the first date of the current billing cycle indicated on the bill. Double click the date field to open a calendar view.
- End Date – enter the last date of the billing cycle indicated on the bill. Double click the date field to open a calendar view.
- Billing Cycle Days – auto-calculated field based on End and Start dates entered.

Billing Summary

- Base Charge – enter the base charge for your current bill. Many customers enter the 'bottom line' here and choose not to itemize the bill.
- Demand Charge – enter the demand charge for the current bill.
- Surcharge – enter any surcharges for the current bill.
- Transport Charge – enter any transport charges shown for the current bill.
- Equipment Charge – enter any equipment charges for the current bill.
- Tax – enter any taxes for the current bill.
- Other charges – enter any other or miscellaneous charges for the current bill.

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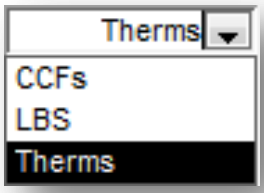
- Credits – enter any credits shown on the current bill.
- Discounts – enter any discounts shown on the current bill.
- Total – auto-calculated field based on values entered in the previous fields.

Measured Usage

- Usage – enter the number of units used as indicated on the bill.
- Usage Type – enter the type of unit for this bill. Options are CCFs, LBSs and Therms.



Payment Information

- Project ID – enter or select the Project ID for this water bill.
- PO Number – enter the PO number used for this water bill.
- Req. Number – enter the Requisition Number for this bill.
- Paid From – enter or select the Account this bill will be paid from.
- Charged To – enter or select the Account this bill will be charged to.
- Cost Per Day – this field will calculate based on Total Cost / Billing Cycle Days.
- Units Per Day – this field will calculate based on Total Cost/Usage.
- Log Another Transaction – clicking this button will close the existing Transaction Form and open the Utility Selection form.
- Close Transactions Form – clicking this button will close the current Transaction Form as well as the Utility Selection Form.

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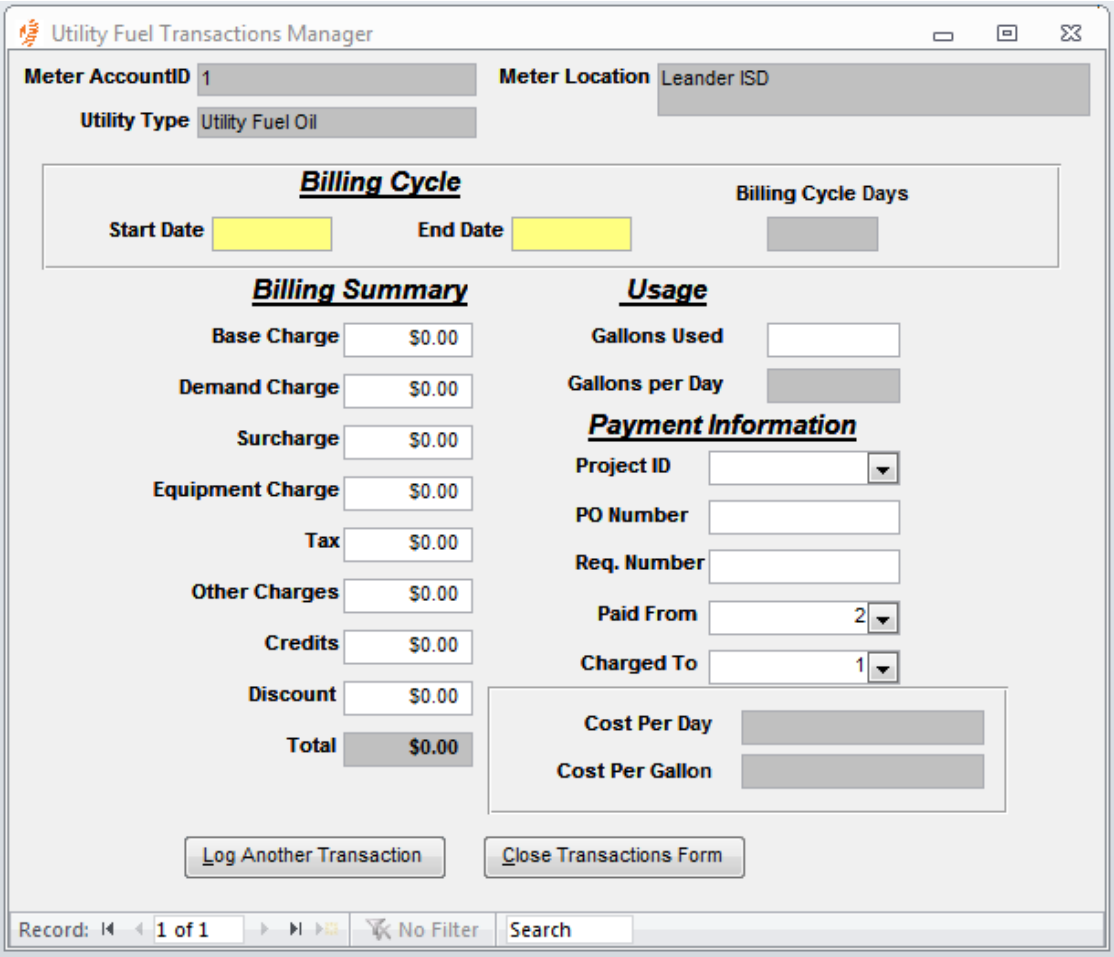
Utility Fuel Accounts



Billing Cycle

- Start Date – enter the first date of the current billing cycle indicated on the bill. Double click the date field to open a calendar view.
- End Date – enter the last date of the billing cycle indicated on the bill. Double click the date field to open a calendar view.
- Billing Cycle Days – auto-calculated field based on End and Start dates entered.

Billing Summary

- Base Charge – enter the base charge for your current bill. Many customers enter the 'bottom line' here and choose not to itemize the bill.
- Demand Charge – enter the demand charge for the current bill.
- Surcharge – enter any surcharges for the current bill.
- Equipment Charge – enter any equipment charges for the current bill.
- Tax – enter any taxes for the current bill.
- Other charges – enter any other or miscellaneous charges for the current bill.
- Credits – enter any credits shown on the current bill.

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- Discounts – enter any discounts shown on the current bill.
- Total – auto-calculated field based on values entered in the previous fields.

Usage

- Gallons Used – enter the number of tons used as indicated on the bill.
- Gallons Per Day – auto-calculated field abased on Gallons Used/Billing Cycle Days.

Payment Information

- Project ID – enter or select the Project ID for this water bill.
- PO Number – enter the PO number used for this water bill.
- Req. Number – enter the Requisition Number for this bill.
- Paid From – enter or select the Account this bill will be paid from.
- Charged To – enter or select the Account this bill will be charged to.
- Cost Per Day – this field will calculate based on Total Cost / Billing Cycle Days.
- Cost Per Gallon – this field will calculate based on Total Cost/Gallons Used.
- Log Another Transaction – clicking this button will close the existing Transaction Form and open the Utility Selection form.
- Close Transactions Form – clicking this button will close the current Transaction Form as well as the Utility Selection form.

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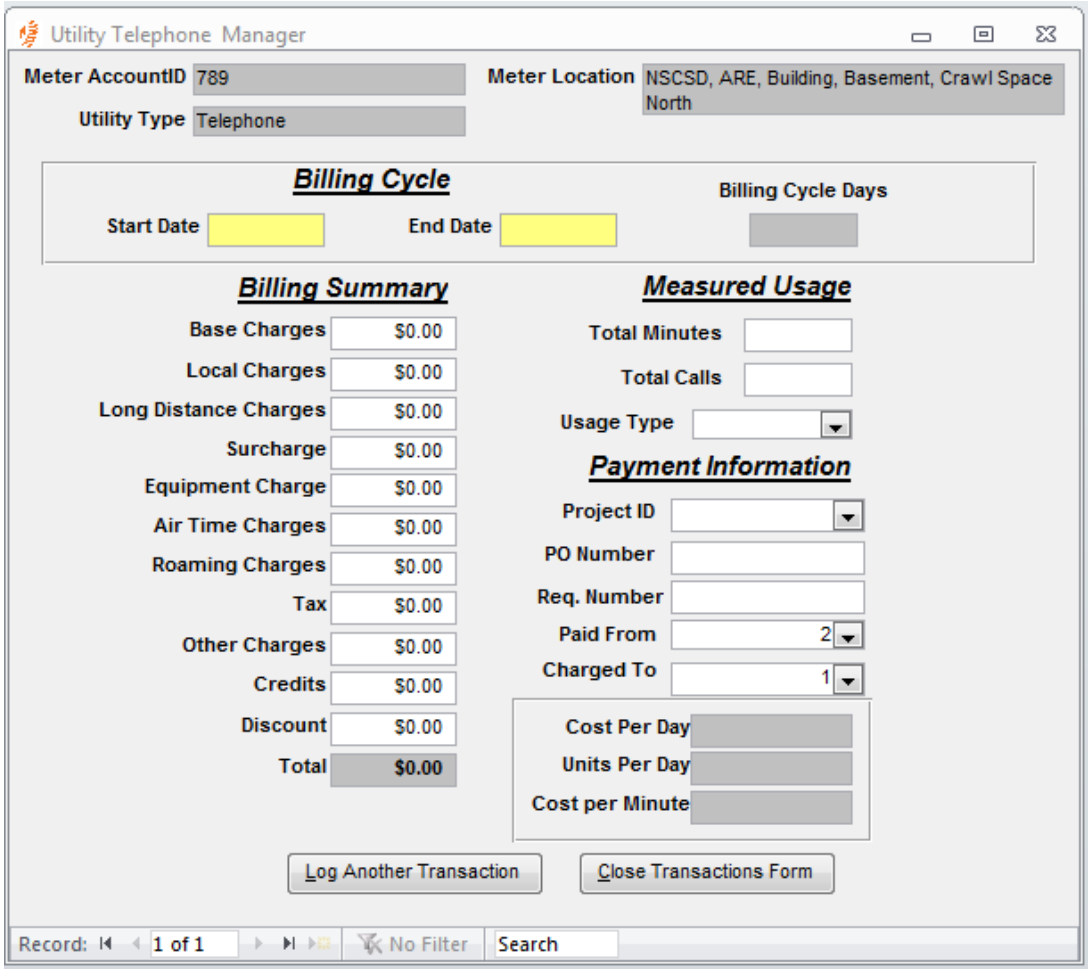
Telephone Transactions



Billing Cycle

- Start Date – enter the first date of the current billing cycle indicated on the bill. Double click the date field to open a calendar view.
- End Date – enter the last date of the billing cycle indicated on the bill. Double click the date field to open a calendar view.
- Billing Cycle Days – auto-calculated field based on End and Start dates entered.

Billing Summary

- Base Charge – enter the base charge for your current bill. Many customers enter the 'bottom line' here and choose not to itemize the bill.
- Local Charges – enter the local charges for the current bill.
- Long Distance Charges – enter any long distance charges for the current bill.
- Surcharge – enter any surcharges for the current bill.
- Equipment Charge – enter any equipment charges for the current bill.
- Airtime Charges – enter any airtime charges indicated for the current bill.

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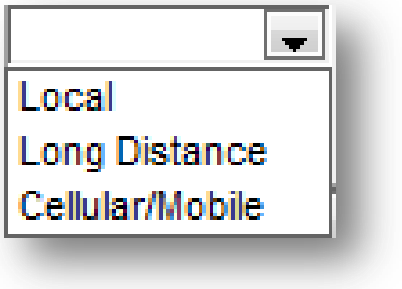
- Roaming Charges – enter any roaming charges indicated for the current bill.
- Tax – enter any taxes for the current bill.
- Other charges – enter any other or miscellaneous charges for the current bill.
- Credits – enter any credits shown on the current bill.
- Discounts – enter any discounts shown on the current bill.
- Total – auto-calculated field based on values entered in the previous fields.

Measured Usage

- Total Minutes – enter the total number of minutes used as indicated on the bill.
- Total Calls – enter the total number of calls as indicated on the bill.
- Usage Type – enter the type of phone usage for this bill. Options are Local, Long Distance and Cellular/Mobile.



Payment Information

- Project ID – enter or select the Project ID for this water bill.
- PO Number – enter the PO number used for this water bill.
- Req. Number – enter the Requisition Number for this bill.
- Paid From – enter or select the Account this bill will be paid from.
- Charged To – enter or select the Account this bill will be charged to.
- Cost Per Day – this field will calculate based on Total Cost / Billing Cycle Days.
- Units Per Day – this field will calculate based on Total Cost/Total Calls.
- Cost Per Minute – this field will calculate based on Total Cost/Total Minutes used.
- Log Another Transaction – clicking this button will close the existing Transaction Form and open the Utility Selection form.
- Close Transactions Form – clicking this button will close the current Transaction Form as well as the Utility Selection form.

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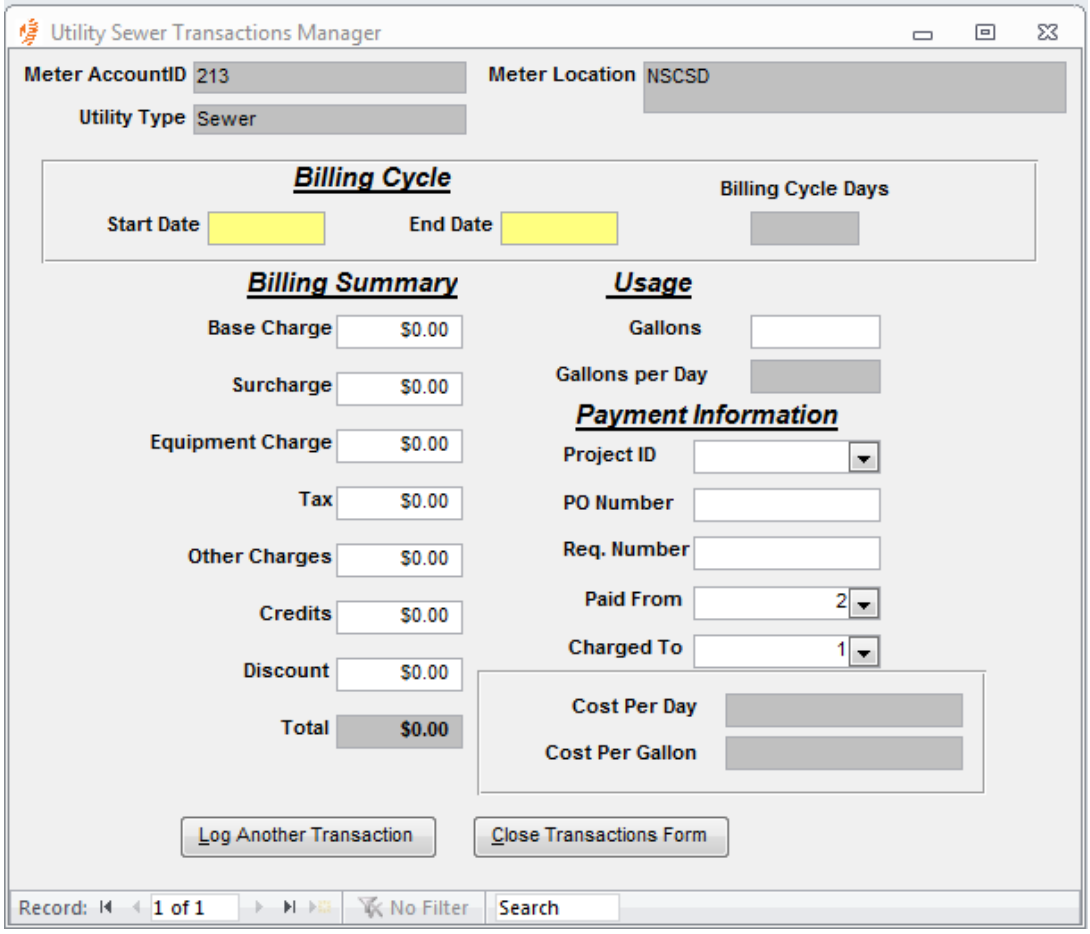
Sewer Transactions



Billing Cycle

- Start Date – enter the first date of the current billing cycle indicated on the bill. Double click the date field to open a calendar view.
- End Date – enter the last date of the billing cycle indicated on the bill. Double click the date field to open a calendar view.
- Billing Cycle Days – auto-calculated field based on End and Start dates entered.

Billing Summary

- Base Charge – enter the base charge for your current bill. Many customers enter the 'bottom line' here and choose not to itemize the bill.
- Surcharge – enter any surcharges for the current bill.
- Equipment Charge – enter any equipment charges for the current bill.
- Tax – enter any taxes for the current bill.
- Other charges – enter any other or miscellaneous charges for the current bill.
- Credits – enter any credits shown on the current bill.
- Discounts – enter any discounts shown on the current bill.

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- Total – auto-calculated field based on values entered in the previous fields.

Usage

- Gallons – enter the number of gallons used as indicated on the bill.
- Gallons Per Day – auto-calculated field abased on Gallons/Billing Cycle Days.

Payment Information

- Project ID – enter or select the Project ID for this water bill.
- PO Number – enter the PO number used for this water bill.
- Req. Number – enter the Requisition Number for this bill.
- Paid From – enter or select the Account this bill will be paid from.
- Charged To – enter or select the Account this bill will be charged to.
- Cost Per Day – this field will calculate based on Total Cost / Billing Cycle Days.
- Cost Per Gallon – this field will calculate based on Total Cost/Gallons.
- Log Another Transaction – clicking this button will close the existing Transaction Form and open the Utility Selection form.
- Close Transactions Form – clicking this button will close the current Transaction Form as well as the Utility Selection Form.

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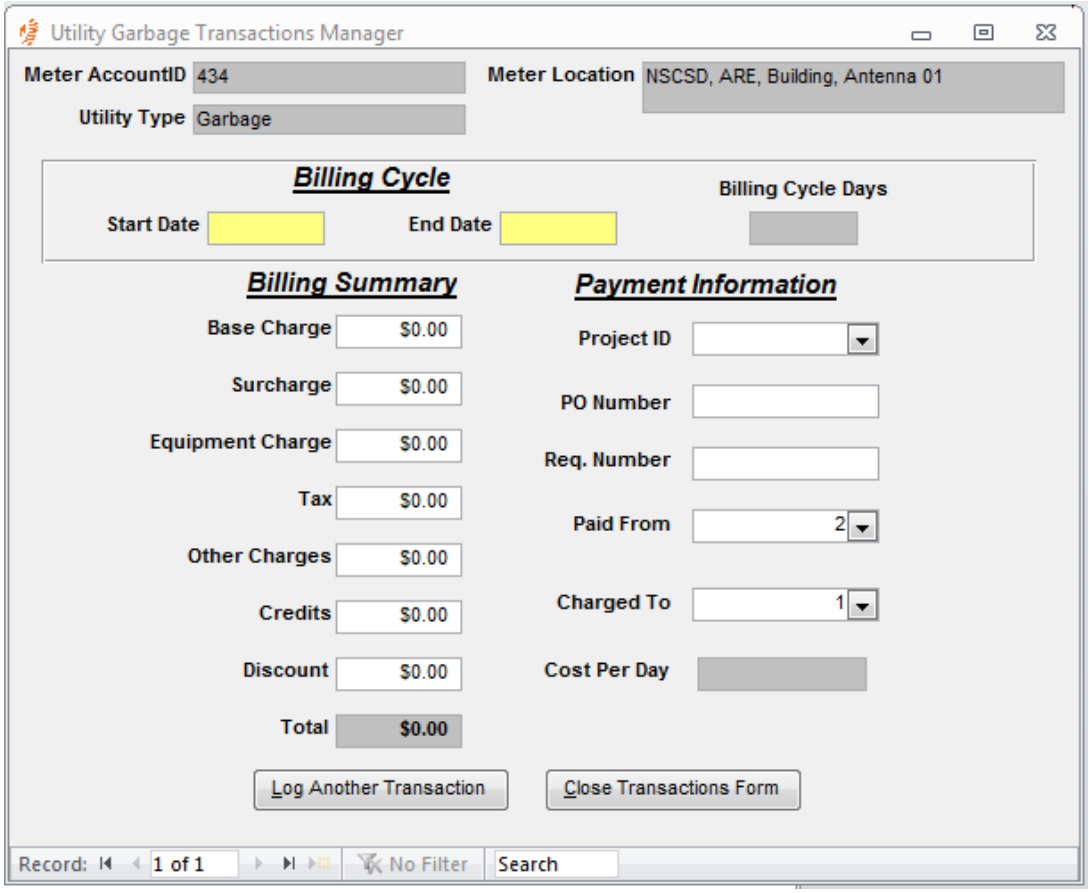
Garbage Transactions



Billing Cycle

- Start Date – enter the first date of the current billing cycle indicated on the bill. Double click the date field to open a calendar view.
- End Date – enter the last date of the billing cycle indicated on the bill. Double click the date field to open a calendar view.
- Billing Cycle Days – auto-calculated field based on End and Start dates entered.

Billing Summary

- Base Charge – enter the base charge for your current bill. Many customers enter the 'bottom line' here and choose not to itemize the bill.
- Surcharge – enter any surcharges for the current bill.
- Equipment Charge – enter any equipment charges for the current bill.
- Tax – enter any taxes for the current bill.
- Other charges – enter any other or miscellaneous charges for the current bill.
- Credits – enter any credits shown on the current bill.
- Discounts – enter any discounts shown on the current bill.
- Total – auto-calculated field based on values entered in the previous fields.

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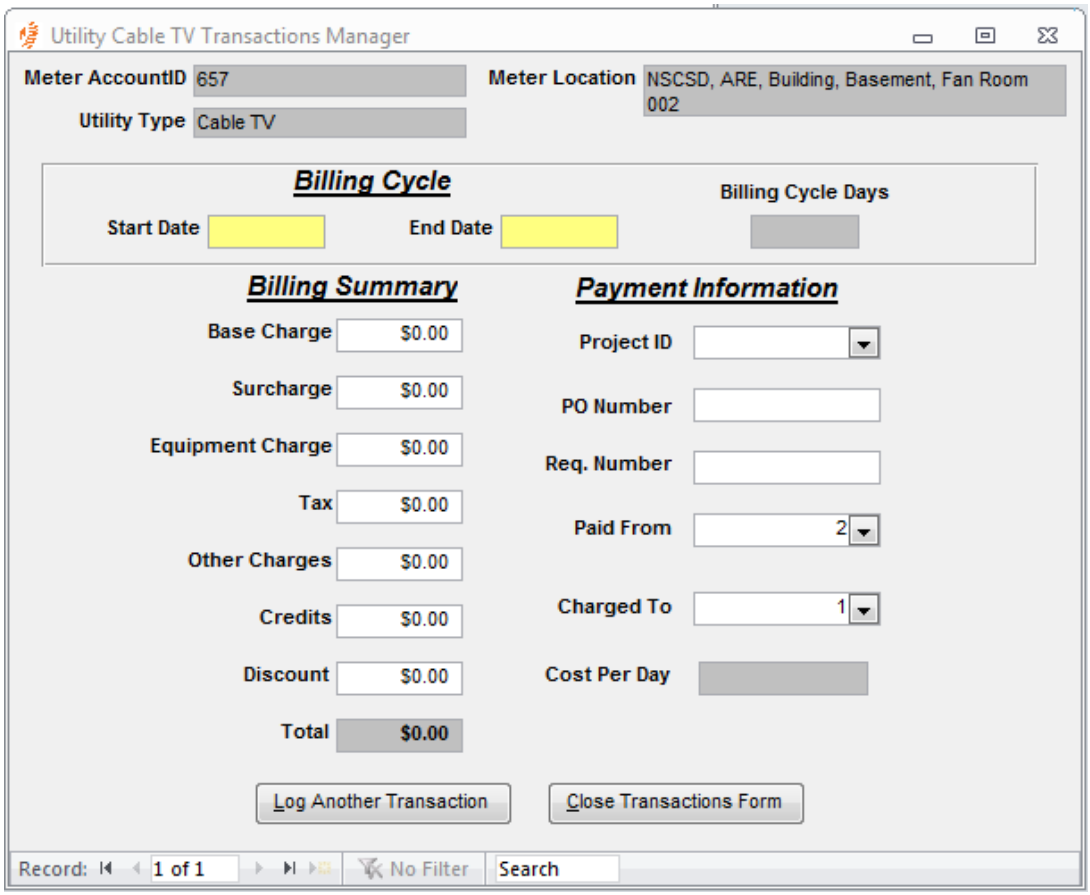
Payment Information

- Project ID – enter or select the Project ID for this water bill.
- PO Number – enter the PO number used for this water bill.
- Req. Number – enter the Requisition Number for this bill.
- Paid From – enter or select the Account this bill will be paid from.
- Charged To – enter or select the Account this bill will be charged to.
- Cost Per Day – this field will calculate based on Total Cost / Billing Cycle Days.
- Log Another Transaction – clicking this button will close the existing Transaction Form and open the Utility Selection form.
- Close Transactions Form – clicking this button will close the current Transaction Form as well as the Utility Selection form.

Cable TV Transactions



Billing Cycle

- Start Date – enter the first date of the current billing cycle indicated on the bill. Double click the date field to open a calendar view.
- End Date – enter the last date of the billing cycle indicated on the bill. Double click the date field to open a calendar view.

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- Billing Cycle Days – auto-calculated field based on End and Start dates entered.

Billing Summary

- Base Charge – enter the base charge for your current bill. Many customers enter the 'bottom line' here and choose not to itemize the bill.
- Surcharge – enter any surcharges for the current bill.
- Equipment Charge – enter any equipment charges for the current bill.
- Tax – enter any taxes for the current bill.
- Other charges – enter any other or miscellaneous charges for the current bill.
- Credits – enter any credits shown on the current bill.
- Discounts – enter any discounts shown on the current bill.
- Total – auto-calculated field based on values entered in the previous fields.

Payment Information

- Project ID – enter or select the Project ID for this water bill.
- PO Number – enter the PO number used for this water bill.
- Req. Number – enter the Requisition Number for this bill.
- Paid From – enter or select the Account this bill will be paid from.
- Charged To – enter or select the Account this bill will be charged to.
- Cost Per Day – this field will calculate based on Total Cost / Billing Cycle Days.
- Log Another Transaction – clicking this button will close the existing Transaction Form and open the Utility Selection form.
- Close Transactions Form – clicking this button will close the current Transaction Form as well as the Utility Selection form.

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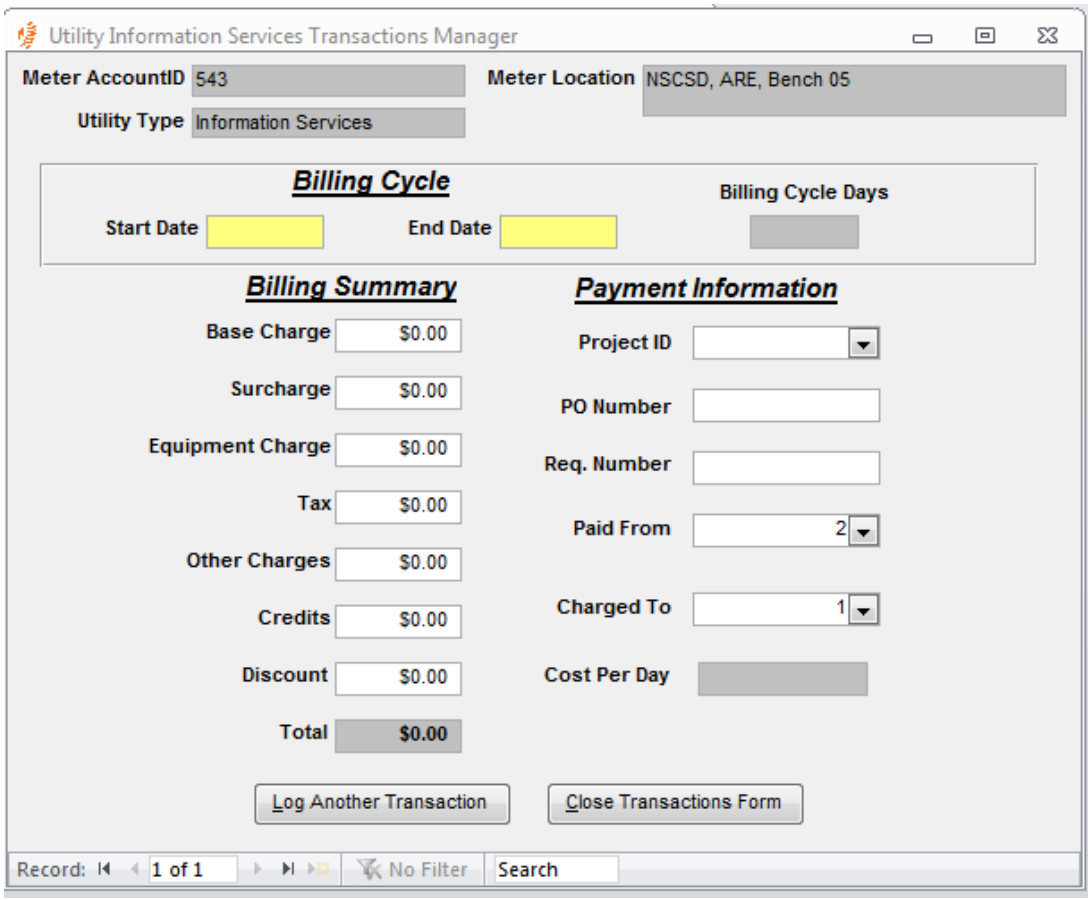
Info Services Transactions



Billing Cycle

- Start Date – enter the first date of the current billing cycle indicated on the bill. Double click the date field to open a calendar view.
- End Date – enter the last date of the billing cycle indicated on the bill. Double click the date field to open a calendar view.
- Billing Cycle Days – auto-calculated field based on End and Start dates entered.

Billing Summary

- Base Charge – enter the base charge for your current bill. Many customers enter the 'bottom line' here and choose not to itemize the bill.
- Surcharge – enter any surcharges for the current bill.
- Equipment Charge – enter any equipment charges for the current bill.
- Tax – enter any taxes for the current bill.
- Other charges – enter any other or miscellaneous charges for the current bill.
- Credits – enter any credits shown on the current bill.

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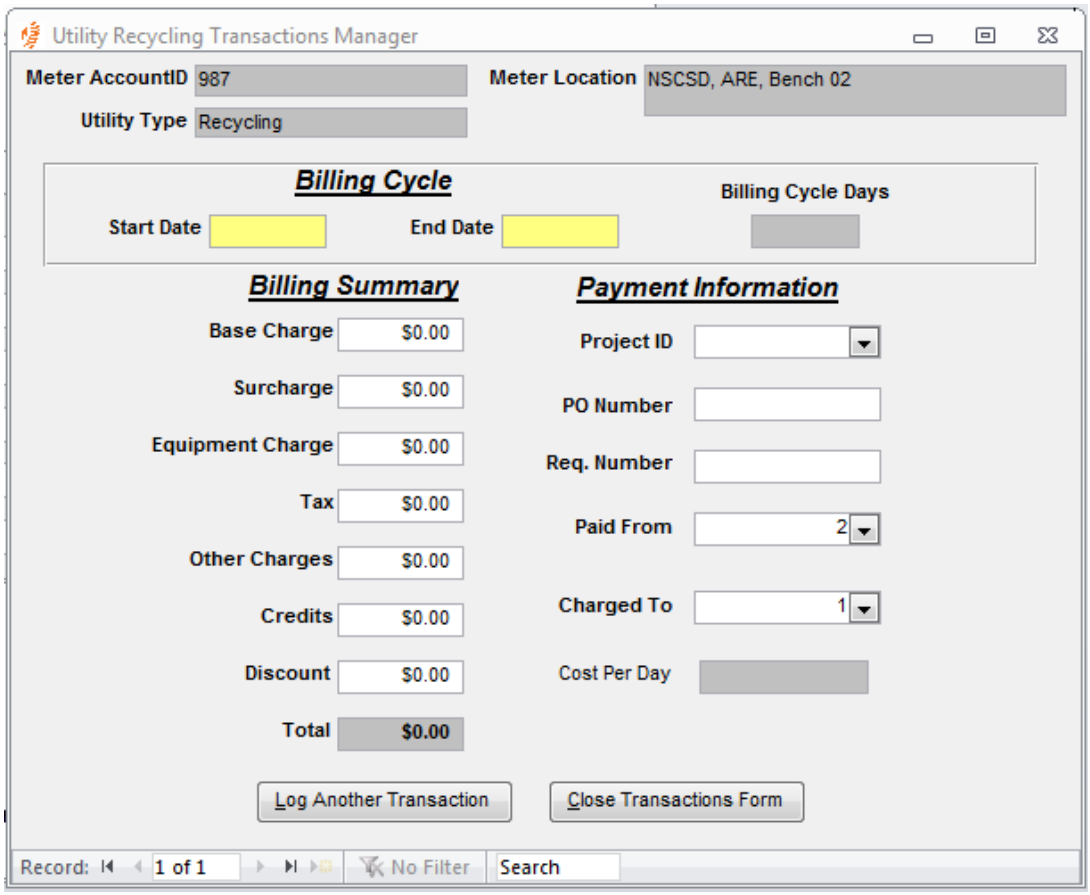
- Discounts – enter any discounts shown on the current bill.
- Total – auto-calculated field based on values entered in the previous fields.

Payment Information

- Project ID – enter or select the Project ID for this water bill.
- PO Number – enter the PO number used for this water bill.
- Req. Number – enter the Requisition Number for this bill.
- Paid From – enter or select the Account this bill will be paid from.
- Charged To – enter or select the Account this bill will be charged to.
- Cost Per Day – this field will calculate based on Total Cost / Billing Cycle Days.
- Log Another Transaction – clicking this button will close the existing Transaction Form and open the Utility Selection form.
- Close Transactions Form – clicking this button will close the current Transaction Form as well as the Utility Selection form.

Recycling Transactions



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Billing Cycle

- Start Date – enter the first date of the current billing cycle indicated on the bill. Double click the date field to open a calendar view.
- End Date – enter the last date of the billing cycle indicated on the bill. Double click the date field to open a calendar view.
- Billing Cycle Days – auto-calculated field based on End and Start dates entered.

Billing Summary

- Base Charge – enter the base charge for your current bill. Many customers enter the 'bottom line' here and choose not to itemize the bill.
- Surcharge – enter any surcharges for the current bill.
- Equipment Charge – enter any equipment charges for the current bill.
- Tax – enter any taxes for the current bill.
- Other charges – enter any other or miscellaneous charges for the current bill.
- Credits – enter any credits shown on the current bill.
- Discounts – enter any discounts shown on the current bill.
- Total – auto-calculated field based on values entered in the previous fields.

Payment Information

- Project ID – enter or select the Project ID for this water bill.
- PO Number – enter the PO number used for this water bill.
- Req. Number – enter the Requisition Number for this bill.
- Paid From – enter or select the Account this bill will be paid from.
- Charged To – enter or select the Account this bill will be charged to.
- Cost Per Day – this field will calculate based on Total Cost / Billing Cycle Days.
- Log Another Transaction – clicking this button will close the existing Transaction Form and open the Utility Selection form.
- Close Transactions Form – clicking this button will close the current Transaction Form as well as the Utility Selection form.

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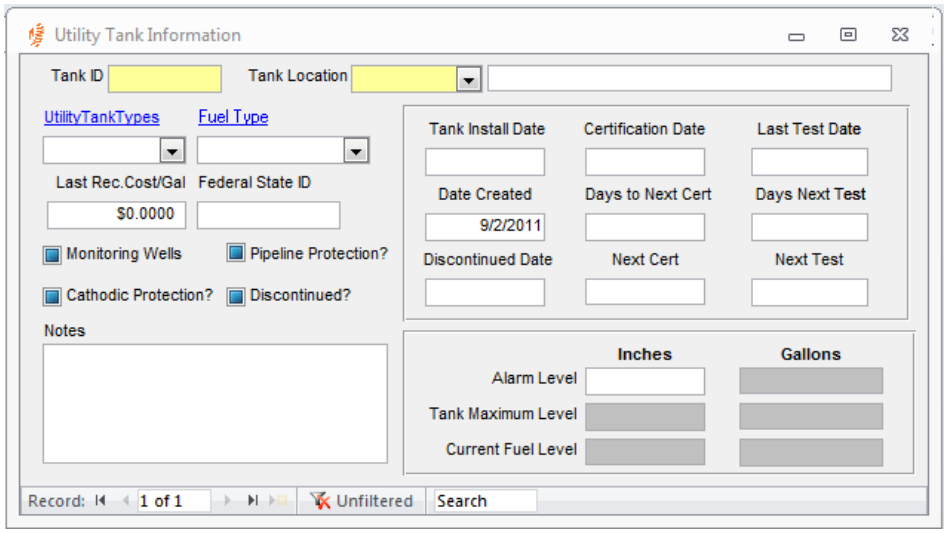
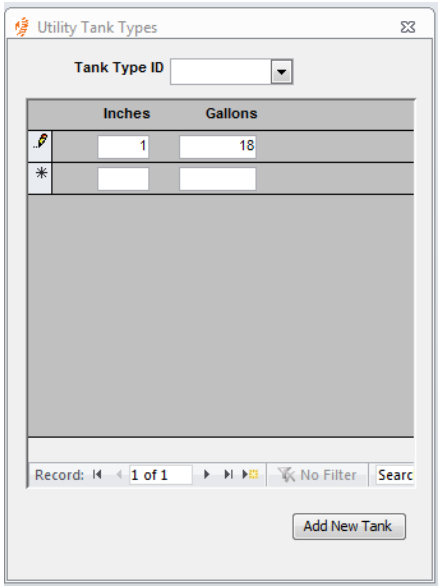
Utility Fuel Tank Info

The Utility Fuel Tank forms allow the user to track fuel levels for tanks owned. This tracking can be recorded for fuels received, adjusted, transferred and/or consumed.



The first step in setting up fuel tanks is entering tank information. As with all TeamWORKS forms, the colored background fields are system required fields. This utility tank system is designed to work with periodic stick readings to manually update the system.

- Tank ID – enter a unique ID number to identify this tank. Must be a unique number.
- Tank Location – enter or select the location where this tank sits.
- Utility Tank Types – select from the list the size of the fuel tank. After select the Tank type ID, the size of the tank is shown in inches and gallons.



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- Fuel Type – select from the list the type of fuel this specific tank will contain.
- Last Rec Cost/Gal – auto update field that will show the cost per gallon the last time fuel was received into this tank.
- Federal State ID – enter the state's federal assigned ID number for this tank.
- Monitoring Wells – check here if this tank has a monitoring well.
- Cathodic Protection – check here if this tank has cathodic protection on the surface.
- Pipeline Protection – check here if this tank has pipeline protection on piping.
- Discontinued – check here if this tank has been discontinued from use.
- Notes – enter any generic notes regarding this specific tank.
- Tank Install Date – enter the date or double click to select the date the tank was installed.
- Certification Date – enter the date or double click to select the date of the most recent certification.
- Last Test Date – enter the date or double click to select the date the tank was last tested.
- Date Created – auto fill date indicating the date the tank was entered into the database.
- Days to Next Cert – enter the number of days until the next certification date. If it is 1 year, then enter 365.
- Days Next Test – enter the number of days until the next test.
- Discontinued Date – auto fill date indicating the tank was marked as discontinued.
- Next Cert – auto fill date showing the next scheduled certification date based on Certification date plus Days to Next Cert field.
- Next Test – auto fill date showing the next scheduled test date based on Last Test Date plus Days Next Test field.

Alarm Level

- Alarm Level Inches – enter the number of ***inches*** the tank will show the need to order more fuel. The Current fuel level field will turn red once this number is equal to or less than the Alarm Level in inches.
- Tank Maximum Level – auto-calculated field indicating the maximum tank level in inches.
- Current Fuel Level – auto-calculated field indicating the current fuel level in inches.
- Alarm Level Gallons – auto-calculated field indicating the set alarm level in gallons.
- Tank Maximum Gallons – auto-calculated field indicating the maximum tank level in gallons.
- Current Fuel Level Gallons – auto-calculated field indicating the current fuel level in gallons.

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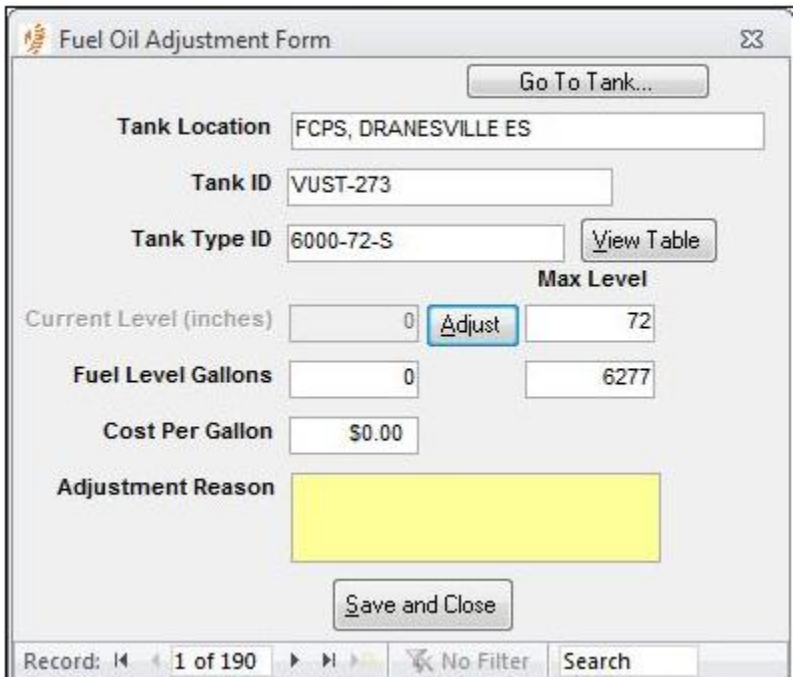
Utility Fuel Adjustments

Fuel adjustments can be made using this form to change current tank levels for various reasons. Each record in the navigation bar (i.e. Record 1 of 5) indicates a tank in the database. Moving to the next record will show data specifically for that tank.



- View Table button – will allow the user to view the level readings for the given tank.
- Adjust button – will 'open' the Current Level (inches) field to allow the user to enter a new value for the current tank level. After the record is saved, the system will adjust the Fuel level Gallons.
- Adjustment Reason – enter the reason for the fuel level adjustment.
- Save and Close –click this button to save changes made to the existing record.
- Go To Tank – this button will open a window with all tanks listed.

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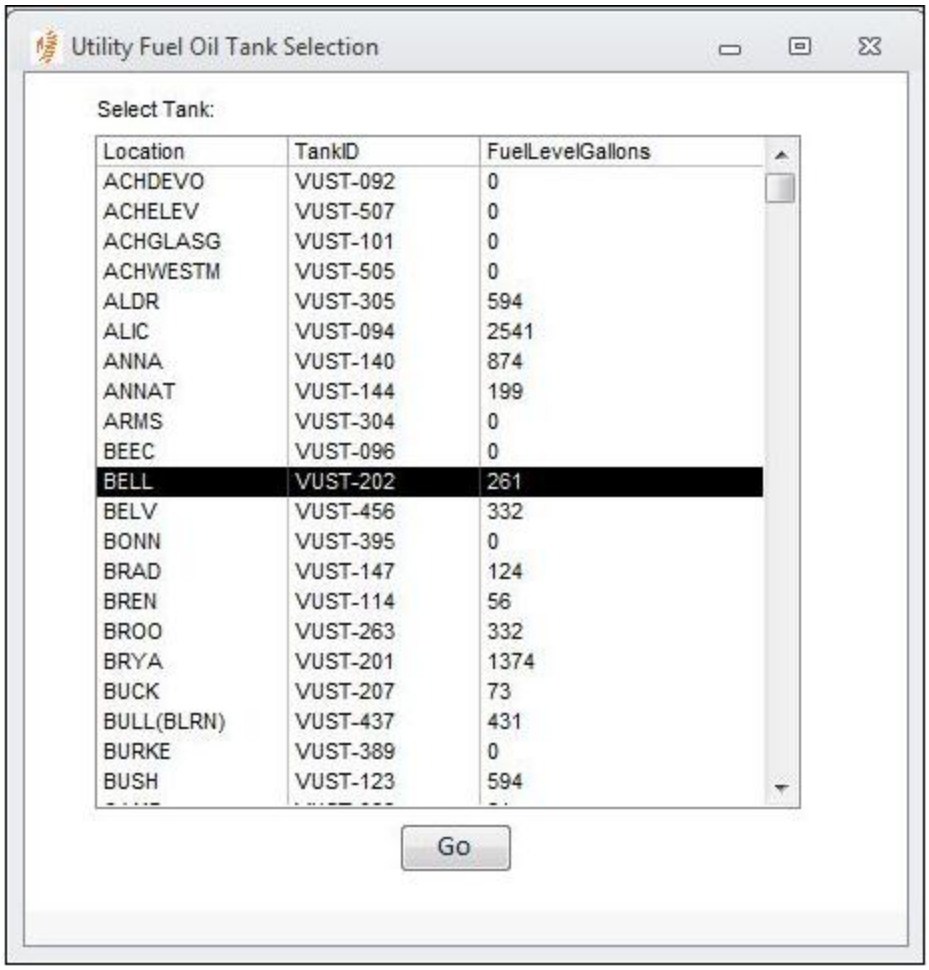

Scroll through the list and find your desired tank. Once you select your tank, click on the “Go” button to return to the Adjustment form.

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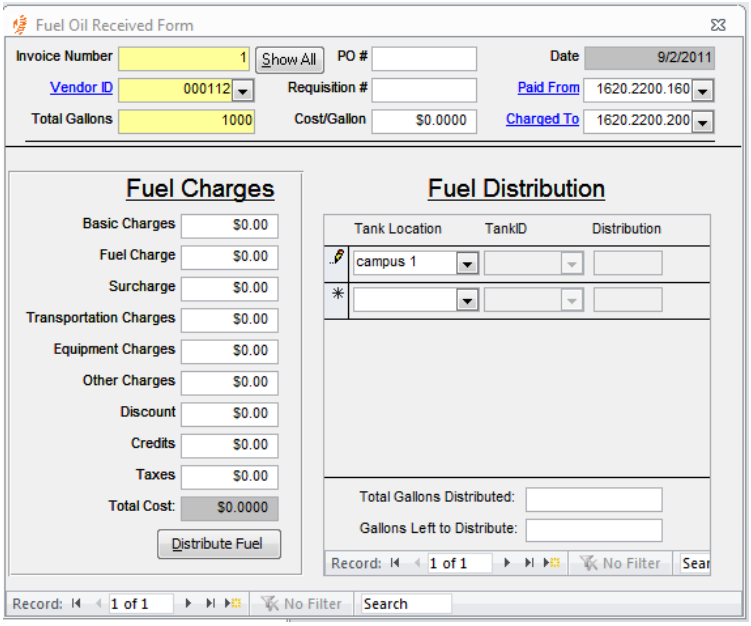
Utility Fuel Received

Whenever fuel is received, use this form to enter the data in the database.



- Invoice Number – (System Required) enter the invoice number for the fuel purchase transaction.
- Show All button – clicking this button will show all previous fuel received records.
- Vendor ID – (System Required) enter or select the Vendor ID for the vendor for the fuel.
- Total Gallons – (System Required) enter the ***total number*** of gallons purchased from the vendor. on this invoice number even if the fuel was dispersed to multiple tanks.
- PO# - enter the PO number issued to purchase the fuel.
- Requisition # - enter the requisition number used to purchase this fuel.
- Cost/Gallon – auto-calculated field which will show CPG based on Total Cost/Total Gallons.
- Date – enter the date the fuel was purchased. A new record will default to today's date. Double click to select the date from a calendar.
- Paid From – enter the account number from which this total cost will be paid from.
- Charged To – enter the account number from which this total cost will be charged to.

After entering the information in the above form, you will be prompted to confirm the information is correct because you will not be able to make changes.

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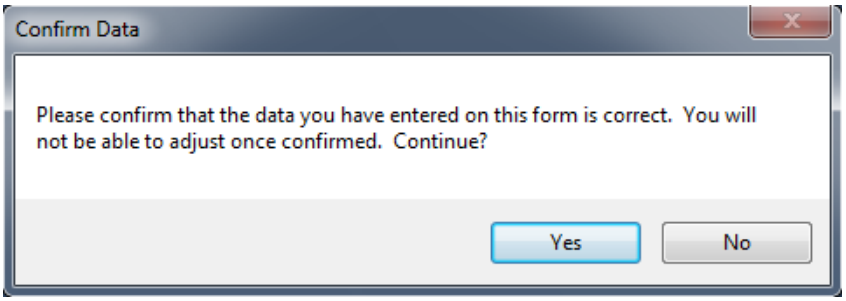
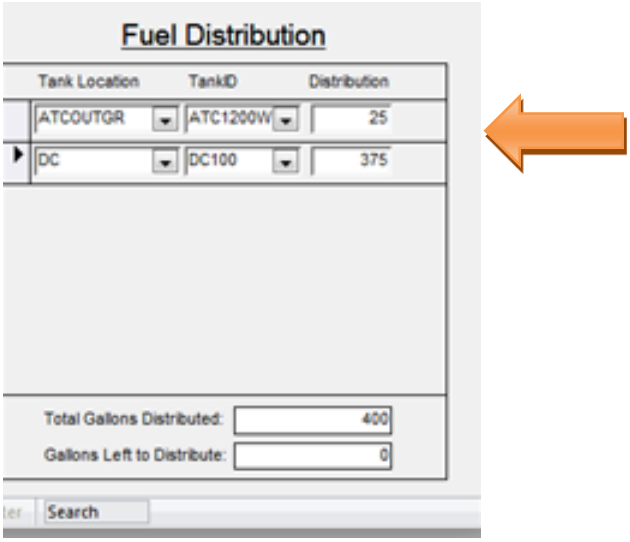


Fuel Charges

- Basic Charges – enter any basic charges on this fuel purchase.
- Fuel Charge – enter any fuel charges on this fuel purchase.
- Surcharge – enter any surcharges on this fuel purchase.
- Transportation Charges – enter any transportation charges on this fuel purchase.
- Equipment Charges – enter any equipment charges on this fuel purchase.
- Other Charges – enter any other charges on this fuel purchase.
- Discounts – enter any discounts on this fuel purchase (will deduct from total cost).
- Credits – enter any credits on this fuel purchase (will deduct from total cost).
- Taxes – enter any taxes on this fuel purchase.
- Total Cost – auto calculated field showing total cost of fuel based on values entered in above charge fields.

Fuel Distribution

- Distribute Fuel Button – when all costs have been entered onto the fuel charges fields, click the Distribute Fuel button to disperse the total gallons received to the appropriate tanks. For instance, if 400 total gallons were received, then 400 gallons must be distributed as in the example picture below.



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- Select the Tank Location - selecting form this list will filter out all tanks for this location in the TankID column.
- TankID – select the TankID of the tank you are distributing fuel to.
- Distribution – enter the number of gallons of fuel dispersed to this tank. The Total Gallons Distributed and the Gallons Left to Distribute will update.

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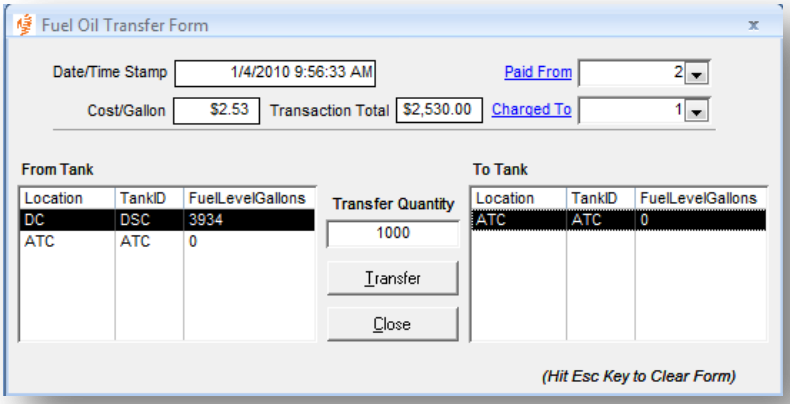
Utility Fuel Transferred

Use this form if you want to transfer fuel from one tank to another.



- Date/Time Stamp – system will automatically provide a date and timestamp for this transfer of fuel.
- Cost/Gallon – auto fill field indicating the cost per gallon of the tank you are transferring from.
- Transaction Total – auto fill field indicating the total dollar value of the fuel being transferred. This is calculated by Transfer Quantity times Cost/Gallon.
- Paid From – enter the account number from which this total cost will be paid from.
- Charged To – enter the account number from which this total cost will be charged to.
- From Tank - Click on the Tank ID from which you will be transferring fuel ***from.***
- Transfer Quantity – enter the number of Gallons you are transferring.
- To Tank - Click on the Tank ID from which you will be transferring fuel ***to.***
- Transfer – click this button to transfer the fuel.
- Close – click this button to close this form.

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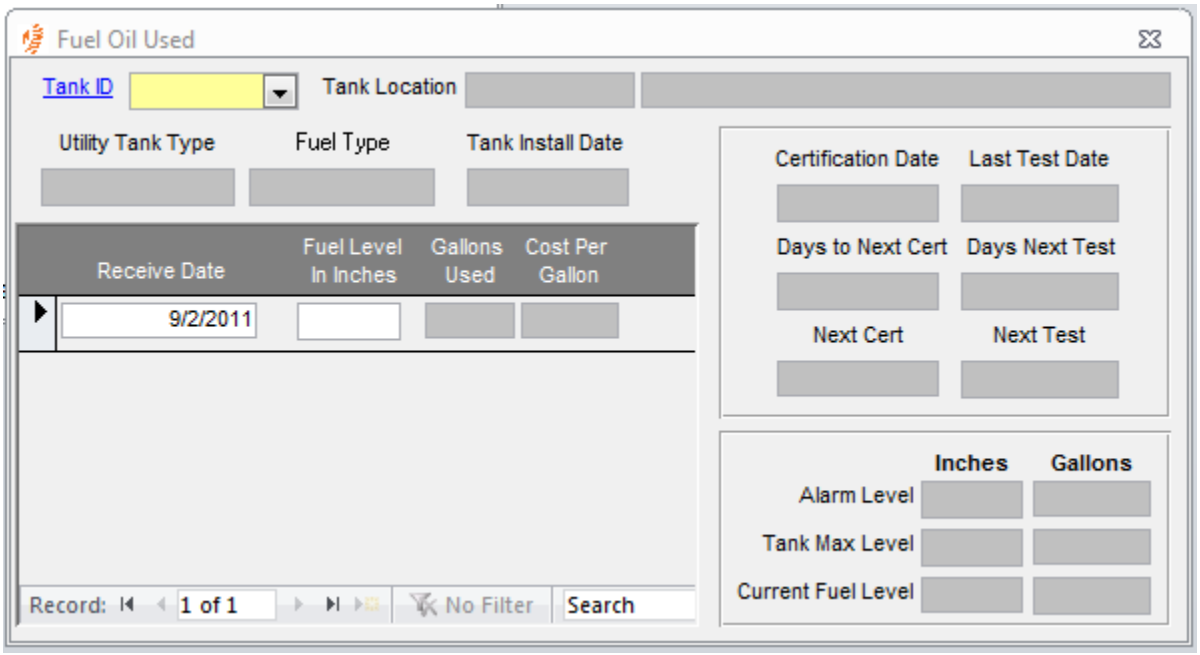
Utility Fuel Used

After a stick reading is taken, use this form to enter that reading and update your fuel tank levels.



- Tank ID –select the TankID for the fuel used. After making your selection, all data on the form will auto populate.
- Received Date – enter the date or double click to select from a calendar for this fuel used.
- Fuel Level In Inches – enter the number of inches as indicated from the stick reading.

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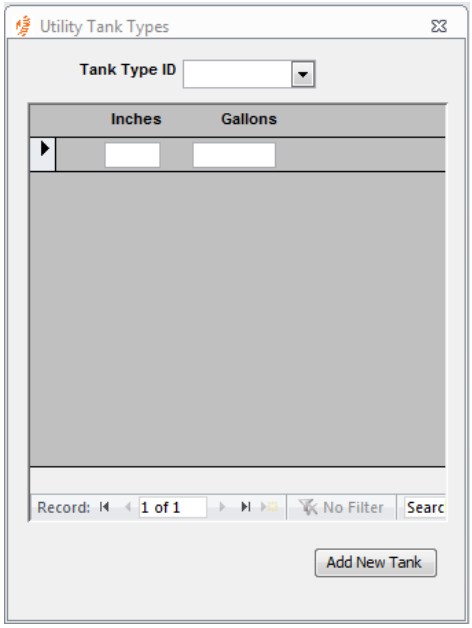
Utility Tank Types

This form has several defaulted tank sizes in the database. If your tank size is not in this list, you can create a new record using this form. The gallons column represents the number of gallons available at the corresponding inch level for the same record.



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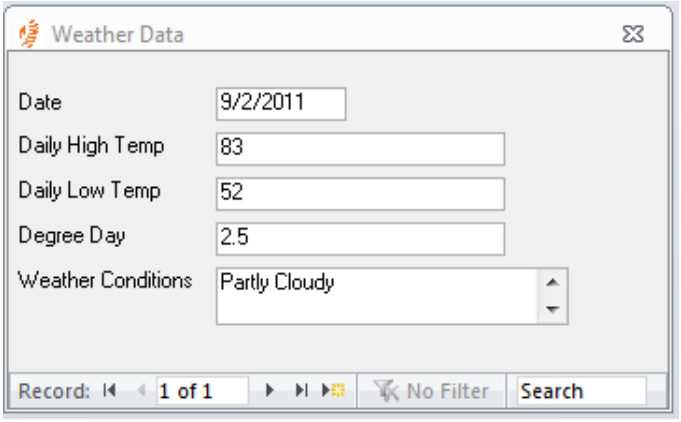
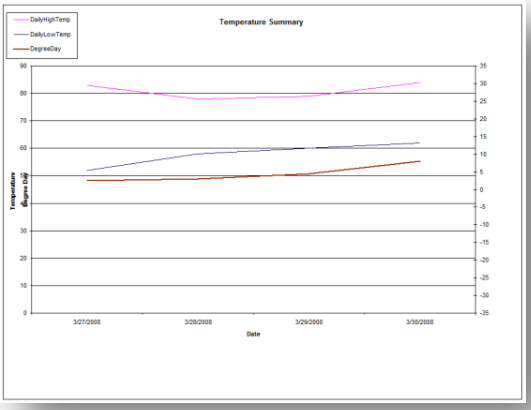
Weather Data

Weather data can be logged or tracked in the database to look at trends in weather over a period of time, which can be pulled up in graphical format. Using or looking at weather data can possibly help in determining utility consumption or spikes in utility consumption. The simple form below allows the user to capture data for:

- Date – enter the date for the weather data you are entering. Defaults to today's date.
- Daily High Temp – enter the High temperature reading for the day.
- Daily Low Temp – enter the Low temperature reading for the day.
- Degree Day – system will automatically calculate the degree day for the date entered. The degree day is calculated as ((DHT + DLT)/2) – 65.
- Weather Conditions – enter the weather conditions such as:
    - Sunny
    - Cloudy
    - Partly Cloudy, etc.

*Temperature readings should be recorded as Fahrenheit.





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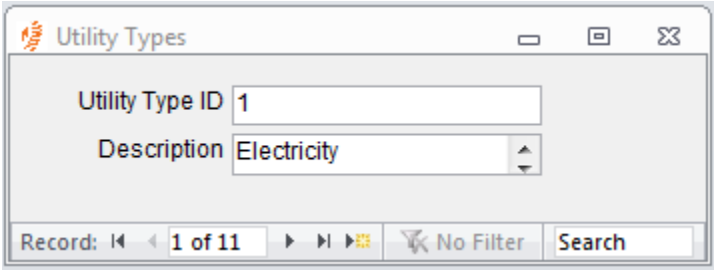
Utility Types

This form is used during initial set-up to enter utility types and should only be used at the direction of TeamWORKS support personnel.



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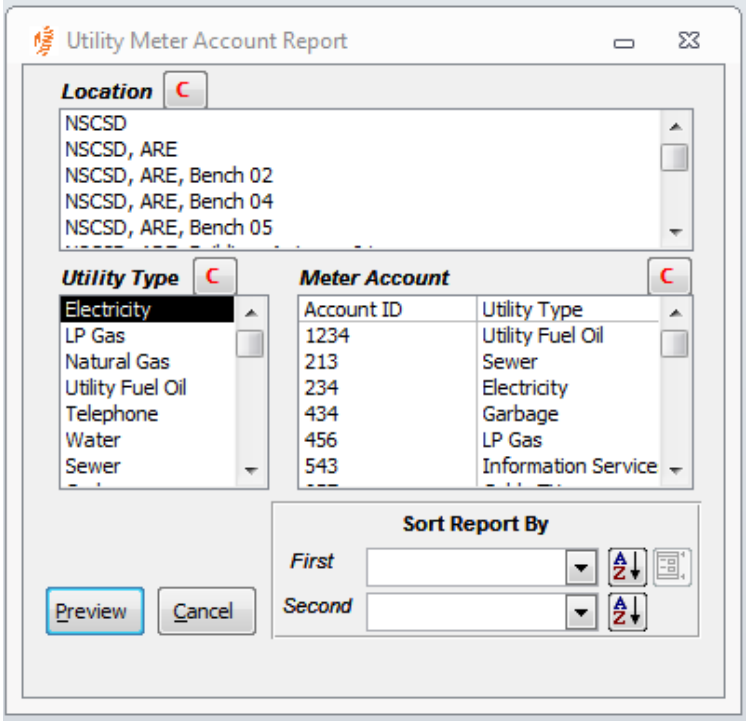
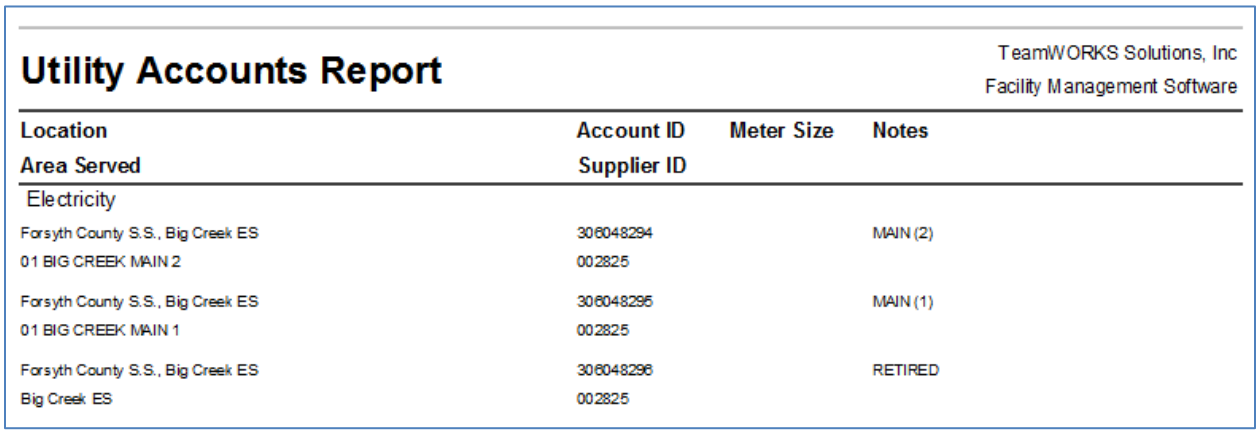
Reports

Utility Meter Account Report

This report includes basic information for each account selected.





Utility Accounts Report

TeamWORKS Solutions, Inc
Facility Management Software

Location Area Served	Account ID Supplier ID	Meter Size	Notes
Electricity			
Forsyth County S.S., Big Creek ES 01 BIG CREEK MAIN 2	306048294 002825		MAIN (2)
Forsyth County S.S., Big Creek ES 01 BIG CREEK MAIN 1	306048295 002825		MAIN (1)
Forsyth County S.S., Big Creek ES Big Creek ES	306048296 002825		RETIRED

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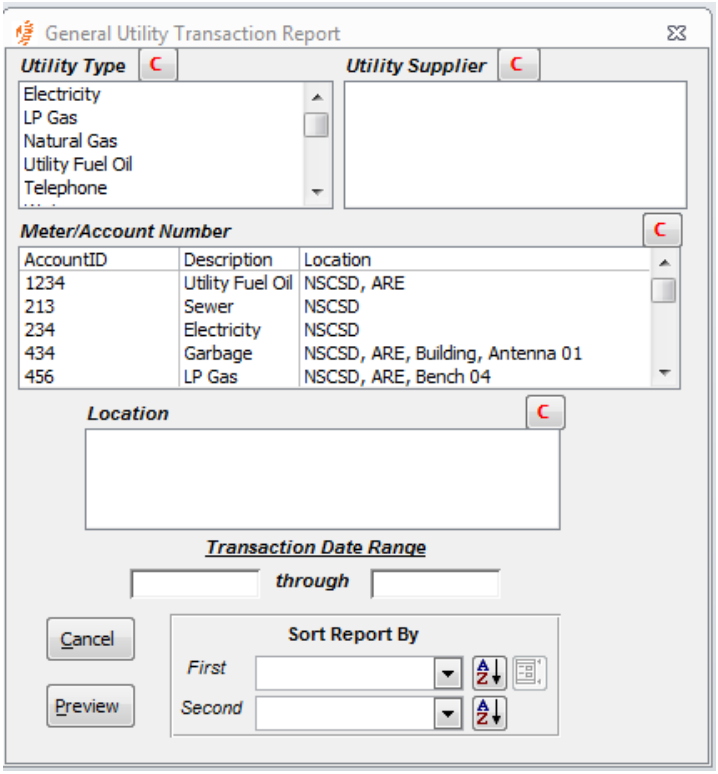
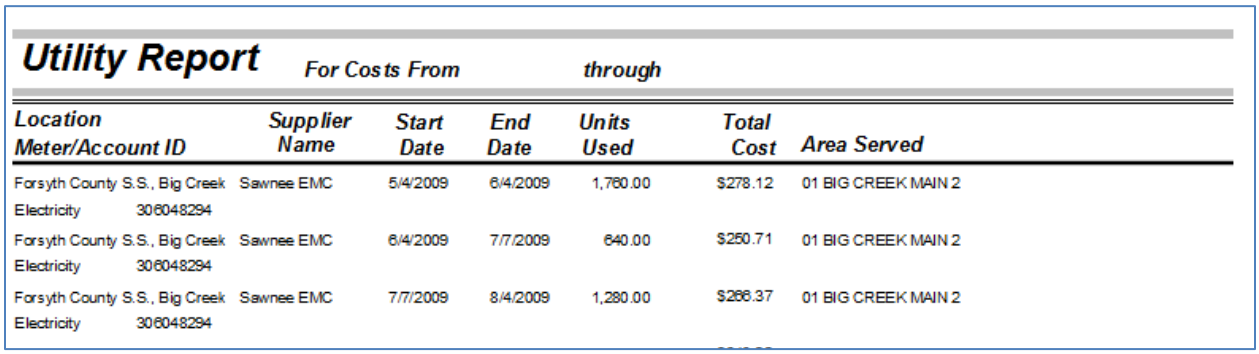
Utility General Trans Report

This report shows general information for each transaction for the selected accounts.





Utility Report *For Costs From* *through*

Location Meter/Account ID	Supplier Name	Start Date	End Date	Units Used	Total Cost	Area Served
Forsyth County S.S., Big Creek Electricity 306048294	Sawnee EMC	5/4/2009	6/4/2009	1,760.00	$278.12	01 BIG CREEK MAIN 2
Forsyth County S.S., Big Creek Electricity 306048294	Sawnee EMC	6/4/2009	7/7/2009	640.00	$250.71	01 BIG CREEK MAIN 2
Forsyth County S.S., Big Creek Electricity 306048294	Sawnee EMC	7/7/2009	8/4/2009	1,280.00	$266.37	01 BIG CREEK MAIN 2

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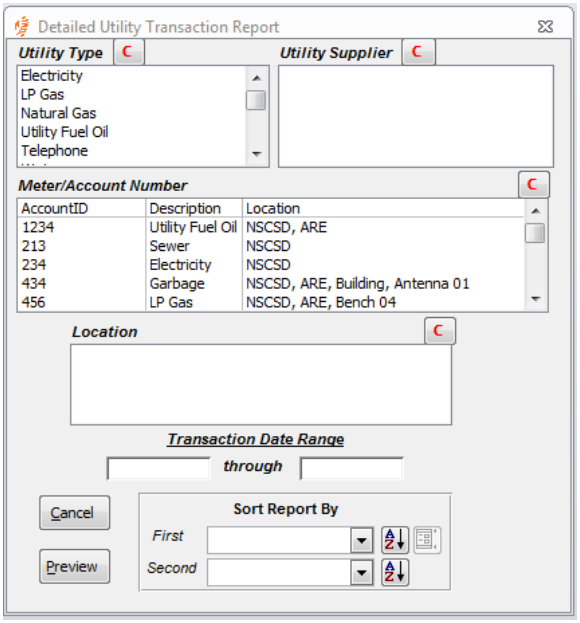
Detailed Utility Trans Report

This report list details for each transaction of all accounts selected over a given date range.



Detailed Utility Transaction Report

TeamWORKS Solutions, Inc
Facility Management Software

Date From 1/1/2009 To 1/1/2010

Utility Type: Electricity Meter/Account ID: 306048294

Full Path Name: Forsyth County S.S., Big Creek ES

Area Served: 01 BIG CREEK MAIN 2 Meter Factor Size: Vendor Name: Sawnee EMC

Start Date	End Date	Days	Billed KW	Actual KW	Other KW	On Peak KWh	Off Peak KWh	Other KWh	Total	Total Cost
5/4/2009	6/4/2009	32	1	1			1,760		1,760	$278.12
6/4/2009	7/7/2009	34	1	1			640		640	$250.71
7/7/2009	8/4/2009	29	1	1			1,280		1,280	$266.37
8/4/2009	9/1/2009	29	1	1			2,520		2,520	$348.99
9/1/2009	10/1/2009	31	1	1			2,200		2,200	$332.83
10/1/2009	10/30/2009	30	1	1			1,920		1,920	$298.60
10/30/2009	12/1/2009	33	1	1			2,600		2,600	$349.90
12/1/2009	1/5/2010	36	1	1			7,560		7,560	$1,003.64
Summary for 'Meter/Account ID' = 306048294 (8 detail records)										
Subtotals:		**254**				**.00**	**20,480.00**	**.00**	**20,480.00**	**$3,129.16**

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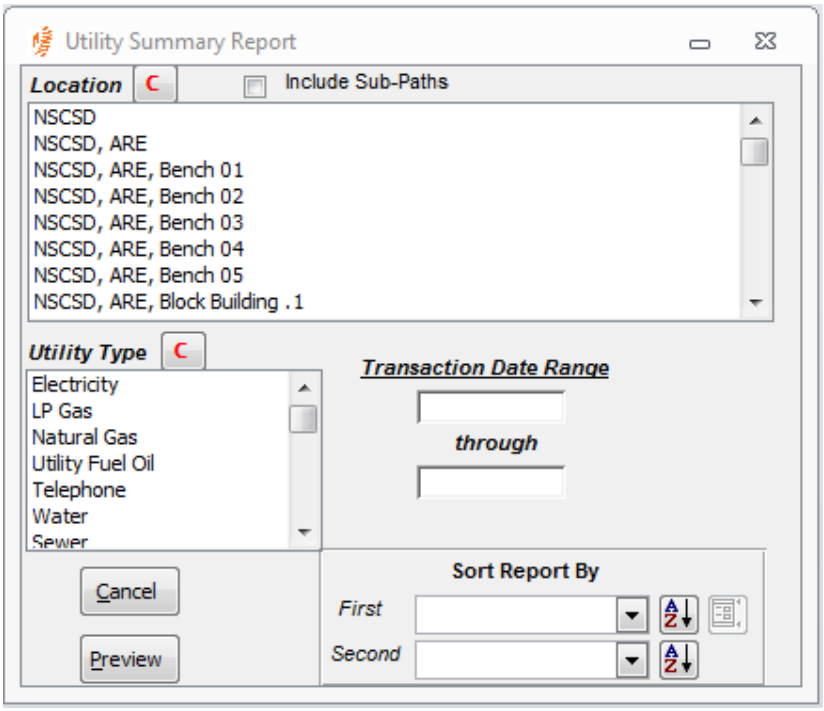
Utility Summary Report

This report provides an overview of costs and usage for each utility type for the selected locations and date range.



Utility Summary Report *For Costs From 1/11/2009 through 1/1/2010*

Location	Total Cost	Total Units	Unit Type	Cost per Student	Cost per Sq. Ft.	Units per Student	Units per Sq. Ft
Forsyth County S.S., Big Creek ES							
Electricity	$133.35	0.00	Kilowatts	$0.00	$0.00	0.00	0.00
Electricity	$250.83	1,358.00	Kilowatts	$0.00	$0.00	0.00	0.01
Electricity	$267.54	1,480.00	Kilowatts	$0.00	$0.00	0.00	0.02
Electricity	$281.75	1,609.00	Kilowatts	$0.00	$0.00	0.00	0.02
Electricity	$310.83	1,825.00	Kilowatts	$0.00	$0.00	0.00	0.02
Electricity	$371.12	2,325.00	Kilowatts	$0.00	$0.00	0.00	0.02
Electricity	$2,125.52	12,920.00	Kilowatts	$0.00	$0.02	0.00	0.13
Electricity	$54,403.01	518,160.00	Kilowatts	$0.00	$0.55	0.00	5.27
Totals	*$58,143.95*	*539,677.00*		*$0.00*	*$0.59*	*0.00*	*5.49*
% of Total	*-0.44%*	*0.17%*					

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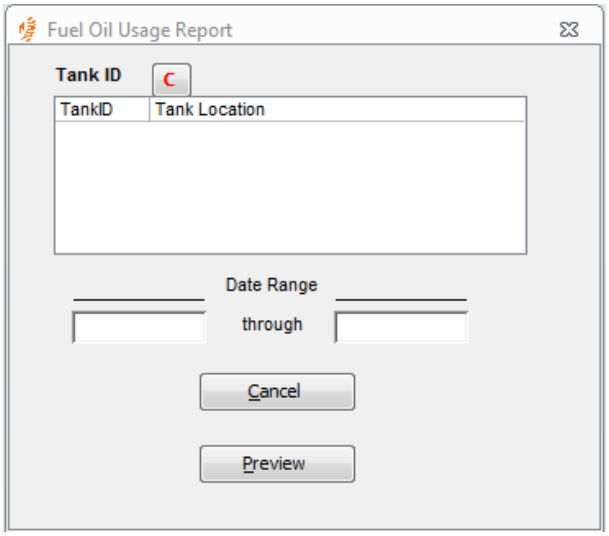
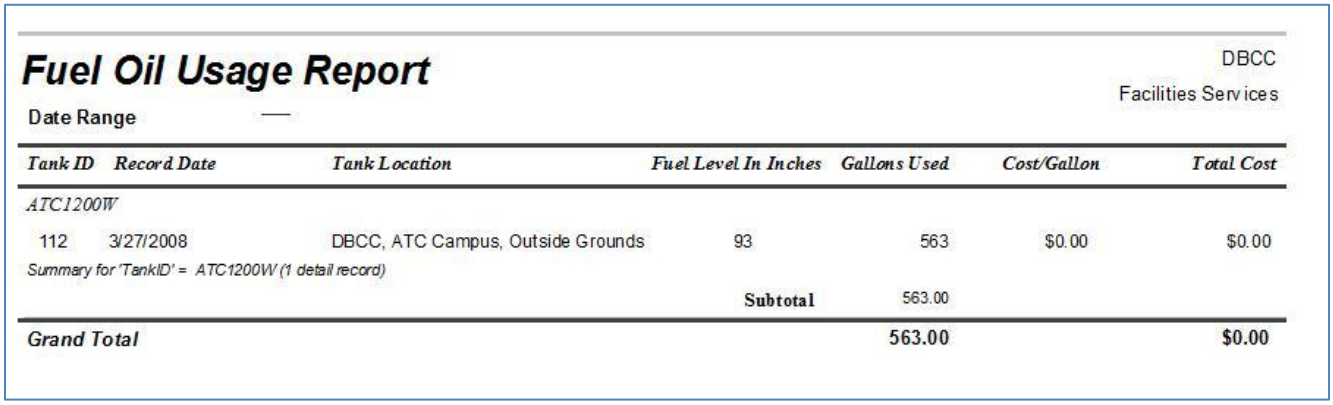
Utility Fuel Usage Report

This report shows the fuel used at a selected tank over a given time period including the current fuel level.





Fuel Oil Usage Report

DBCC
Facilities Services

Date Range

Tank ID	Record Date	Tank Location	Fuel Level In Inches	Gallons Used	Cost/Gallon	Total Cost
ATC1200W						
112	3/27/2008	DBCC, ATC Campus, Outside Grounds	93	563	$0.00	$0.00
Summary for 'TankID' = ATC1200W (1 detail record)						
			Subtotal	563.00		
Grand Total				**563.00**		**$0.00**

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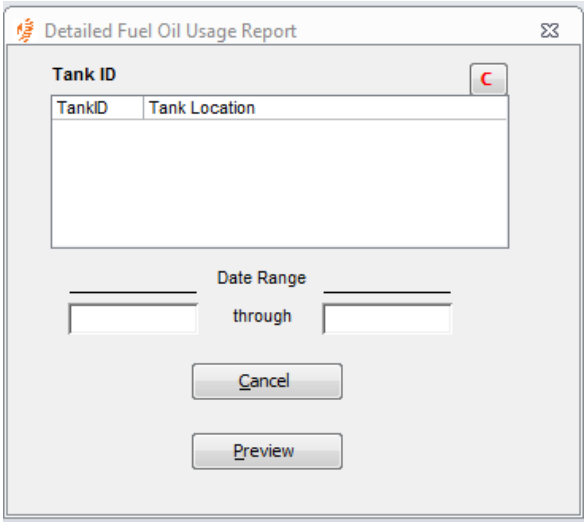
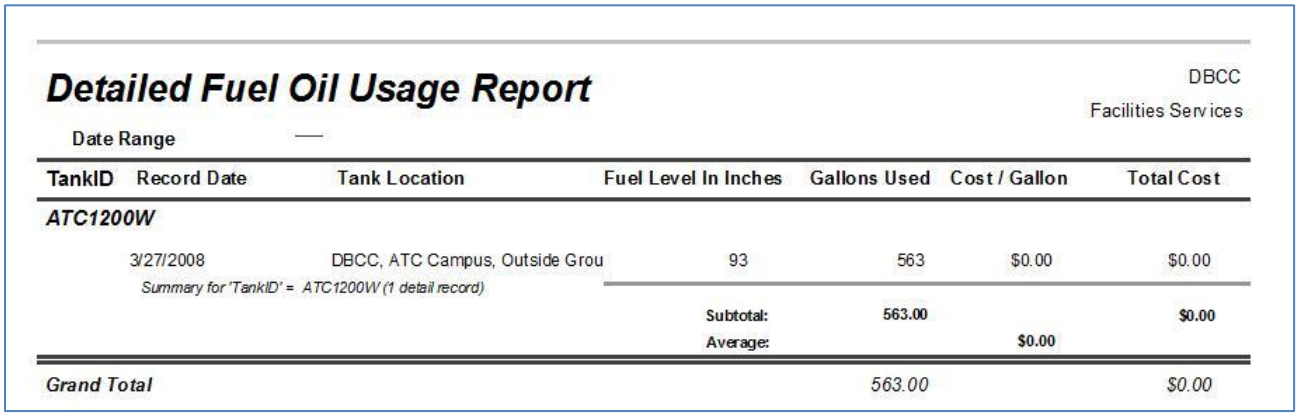
Detailed Fuel Usage Report

This report contains the same information as the Fuel Usage Report but list details for each transaction for the tank selected.





Detailed Fuel Oil Usage Report

DBCC
Facilities Services

Date Range —

TankID	Record Date	Tank Location	Fuel Level In Inches	Gallons Used	Cost / Gallon	Total Cost
ATC1200W						
	3/27/2008	DBCC, ATC Campus, Outside Grou	93	563	$0.00	$0.00
	Summary for 'TankID' = ATC1200W (1 detail record)					
			Subtotal:	**563.00**		**$0.00**
			Average:		**$0.00**	
Grand Total				*563.00*		*$0.00*

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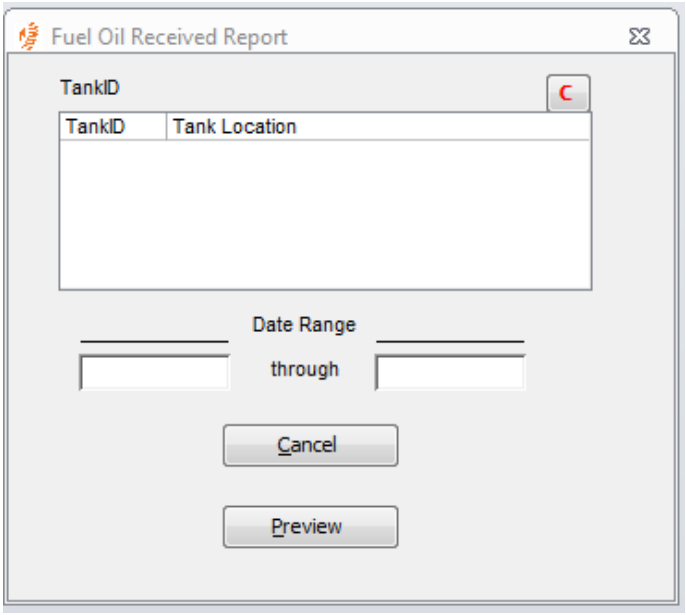
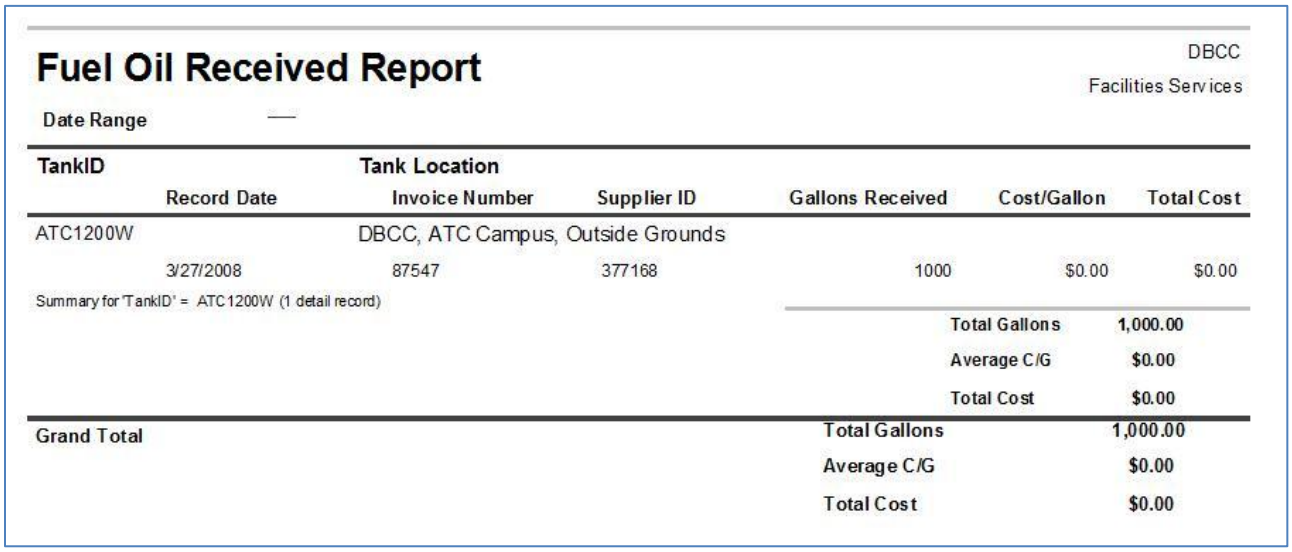
Utility Fuel Received Report

This report shows each fuel received transaction for the tank(s) selected.





Fuel Oil Received Report

DBCC
Facilities Services

Date Range —

TankID	Tank Location					
	Record Date	Invoice Number	Supplier ID	Gallons Received	Cost/Gallon	Total Cost
ATC1200W		DBCC, ATC Campus, Outside Grounds				
	3/27/2008	87547	377168	1000	$0.00	$0.00

Summary for 'TankID' = ATC1200W (1 detail record)

Total Gallons	1,000.00
Average C/G	$0.00
Total Cost	$0.00

Grand Total	
Total Gallons	1,000.00
Average C/G	$0.00
Total Cost	$0.00

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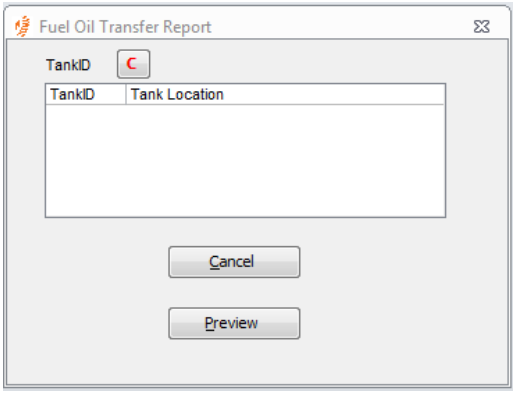
Utility Fuel Transfer Report

This report

Select the Tank ID based on ***transferred from*** for which you would like to run the report.



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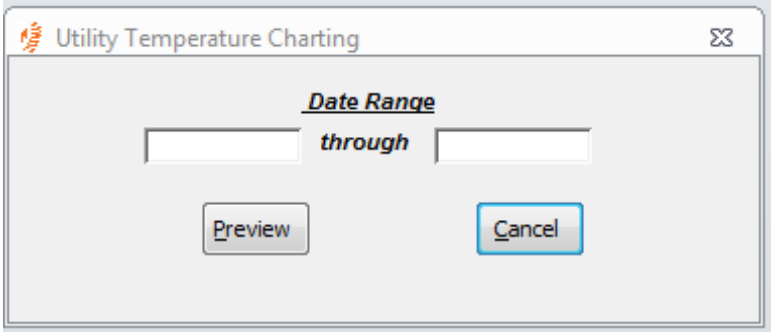
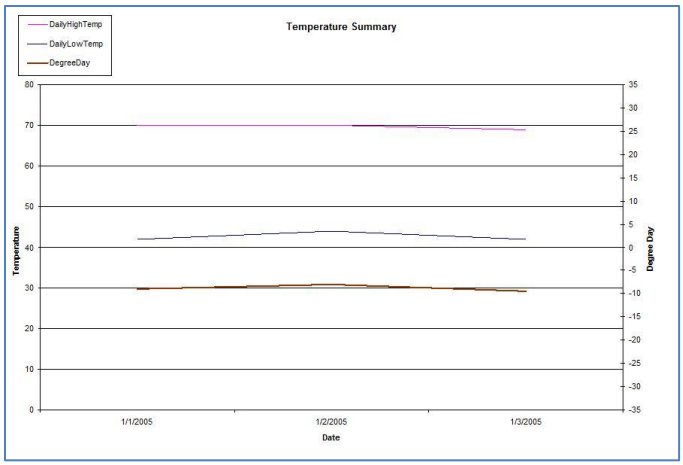
Utility Temperature Chart

This report shows a line graph depicting temperate changes over a give date range.





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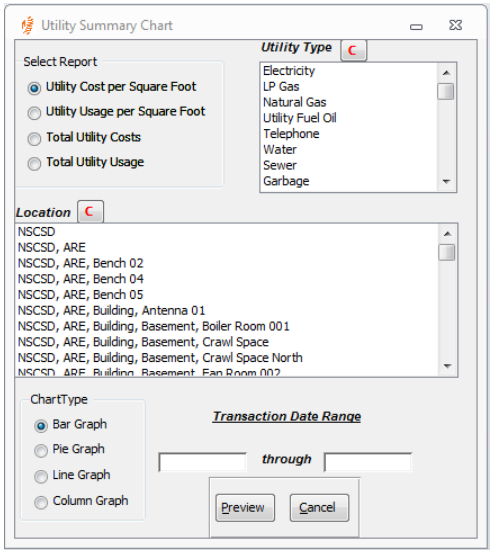
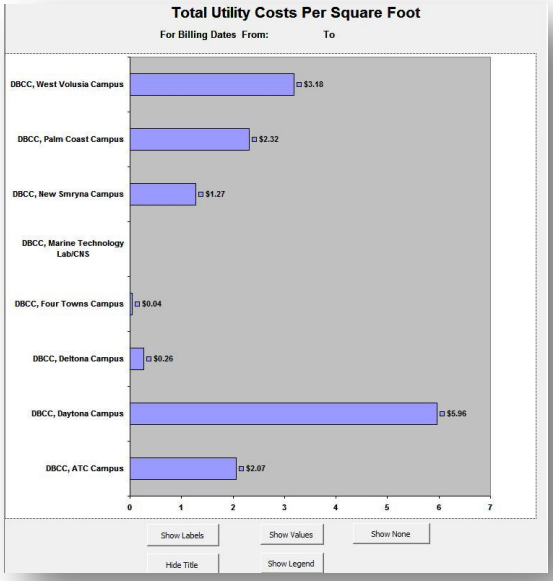
Utility Summary Chart

The Utility Summary Chart can graph cost per student and cost per square foot if the data has been entered in the Location Information module under Administrator





Customer Support

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