REQUEST FOR PROPOSALS
UTILITY BILLING SOFTWARE

RFP# 12-004
FEBRUARY 2012
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Introduction

The City of Poway (“City”) is requesting sealed proposals from interested and qualified vendors for Utility Billing Software. The proposed solution should accommodate all current City utility billing processes and procedures. The selection and implementation of new utility billing software should also be seen as an opportunity to improve City business functions, productivity and the use of new and future technology.

City Overview

The City of Poway (“City”) is a general law city incorporated under California law in 1980. The City serves a population of approximately 50,000, covers an area of approximately 39 square miles, and is located in San Diego County. It operates under the City Council-City Manager form of government.

The City provides a high quality and dependable potable water supply to its residents and businesses. The City also provides wastewater collection (sewer) service and non-potable recycled water for landscape purposes.

The Customer Services Division of the Administrative Services Department performs the billing for water and sewer accounts. It has four full-time staff members responsible for Utility Billing functions. The City has approximately 14,000 residential, commercial, and landscape accounts. The City has four separate meter reading and billing cycles. Meters are read four days per week and utility bills are produced biweekly, with each customer receiving one bill bimonthly. The City has a 2-tier billing structure for residential water customers and a single bill rate for commercial, multi-family, and irrigation water customers. Sewer charges are billed based upon water consumption with an average winter water use cap for residential customers.

Meter reading, billing and shut offs for non-payment are accomplished on a master calendar that is currently maintained outside of the billing system. Water meters are read manually and input into handheld devices provided by a third party vendor, Itron. This data is then processed and transferred into the utility billing system using software also provided by Itron.

Daily payment processing is accomplished through a variety of methods. These include online web payments, automated clearing house payments (ACH), electronic receipt, and payments posted through online bill payment providers. Payment processing also includes scanning of remittance stubs received through the mail by our lockbox service provider (Union Bank of California) and over the counter.
Currently the City uses a custom .Net SQL application as the platform for the utility billing software. The city’s online cash receipts system is currently provided by Infosend, a contractor that also provides for the printing and mailing of the bills.

Delivery Requirements

Responses to this RFP shall be submitted in a sealed package addressed as noted below, and clearly identifying the vendor making the submission. The package must be marked as “CONFIDENTIAL – Utility Billing Software RFP.” One original and two copies must be submitted by each vendor. Vendor is liable for any of the costs incurred in preparing and submitting a proposal.

Please review the RFP fully, complete all responses and submit the package so that it is received by the City of Poway no later than 4:00 P.M. on April 5, 2012. Responses received after this date/time will not be considered. Postmark date will not constitute timely delivery. Vendors are solely responsible for ensuring timely receipt of their responses. Delivery by fax is not acceptable.

Mail to: Hand-Deliver to:
City of Poway City of Poway
Customer Services Division Customer Services Division
Utility Billing Software RFP Utility Billing Software RFP
P.O. Box 789 13325 Civic Center Drive
Poway, CA 92074-0789 Poway, CA 92064

The City reserves the right to cancel this RFP at any time and for any reason without any liability to any proponent or to waive irregularities at their own discretion. The City reserves the right to accept or reject any or all bids.

Schedule (subject to change as required)

1) RFP Published and distributed: 03/08/12
2) Proposals due: 04/05/12 at 4:00 p.m.
3) Proposals reviewed and evaluated: 04/19/12
4) Scripted Demonstrations (short listed vendors only) 04/23/12 – 04/26/12
5) Finalist interviews/follow up: 04/30/12 – 05/2/12
6) Selection: 05/18/12
7) City Council approval: 06/05/12
8) Contract begins: 07/01/12
Contact Information

Questions regarding this Request for Proposals should be submitted by March 28, 2012 to:

Linda Shields  
Senior Management Analyst  
City of Poway  
E-Mail: lshields@poway.org

Any questions received by the City of Poway that affect the Request for Proposals process will be issued as addenda by the City of Poway.

Scope of Services

The City desires a utility billing software application that will meet current core functions and future needs of the City, and will integrate all aspects of utility services, including maintaining accounts, billing and collection, interface to meter reading system both manual and automated, service order processing, payment interfaces, and customer web access. Additionally, the City desires to implement improvements to reporting functions, the ability to email bills and improving the automation and streamlining of the utility billing process. The City may implement newer technologies and processes such as Automated Meter Reading in the future.

In addition to utility billing software, the vendor must lead the installation of the new software and the conversion of current utility billing data to the new software database. The City also requires the vendor to train all key users and to extend technical support so long as the City contracts with the vendor.

At the end of this RFP the City will enter into a professional services agreement with the vendor that provides the best value for the utility billing software including installation, conversion, implementation, training and support, and meets all the specifications of this RFP.

Required Functionality

The current utility billing process is included in Appendix A: Current Utility Billing Process and describes current system functionality. The requirements identified in Appendix B: System Functional Requirements are organized into eight categories. The responses should address the following:
General Functional Requirements

1. **Customer, Account, and Location Management**
   This includes the creation, maintenance, and use of customer accounts.

2. **Rates and Fees Management**
   This includes the maintenance and application of all utility rates, miscellaneous charges, fees, and taxes.

3. **Meter Reading and Inventory Management**
   This includes meter inventory, reading, and consumption requirements.

4. **Billing Management**
   This includes the preparation, calculation, printing, and mailing of bills.

5. **Financial Management**
   This includes payments, adjustments, refunds, deposits, and accounting entries.

6. **Delinquency Management**
   This includes penalties and interest, payment plans, shut offs, and collections.

7. **Service Order Management**
   This includes creating, completing, and managing service orders.

8. **Reporting**
   This includes standard and user created reports to query data.

**Hardware and Software Standards**

The City will prefer solutions that comply with the following standards:

Server hardware – HP Servers  
Server operating system – Windows 2008 R2.  
Virtual Infrastructure – VMWare vSphere 4.0 update 1  
Database – Microsoft SQL.
Vendor Requirements

Insurance

1. Commercial General Liability Insurance of not less than $1,000,000 per occurrence and $2,000,000 aggregate.

2. Professional Liability Insurance of not less than $1,000,000.

3. Workers’ Compensation Insurance with Statutory Limits of not less than $1,000,000 per accident.

4. City of Poway must be listed as an “additional insured” on the Vendor’s policy via endorsement of the policy.

5. Vendor must provide a current Certificate of Insurance to the City of Poway with the above stated requirements along with a valid Additional Insured Endorsement.

6. The insurer must be a California admitted surety or an insurance company listed by the State Insurance Commissioner and shall have a rating in the latest Best’s Rating Guide of “A” or better and Class VI or better, or be treasury listed for the size of risk undertaken.

Business Certificate

1. Throughout the duration of the contract, Vendor must hold a valid and current City of Poway Business Certificate.

Proposal Submission Format Requirements

The submitted proposal must address all categories and performance expectations within this RFP. Before submitting a proposal, vendors shall examine the specifications in order to understand all existing conditions and limitations. The vendor shall indicate in the proposal the total sum to cover the cost of all items included in the RFP.

1. Executive Summary

   Provide a concise overview describing the proposed approach to completing the work.

2. Description of Organization and Qualifications
Provide a description of the major business functions, history and structure of the organization. Include a profile of the office location, staff and services that will be assigned to the City’s account.

Specify the number of years the vendor has been in the public sector software business. Provide a brief statement of the company’s background demonstrating longevity and financial stability.

Describe internal performance metrics used to quantify key customer support responsiveness, such as issues resolved on first call or average time to reach issue resolution.

Provide the following background information on the proposed utility billing software: original development, date of first release and date of most recent release.

3. **Experience on Similar Projects**

Provide summaries or brief descriptions of a minimum of three projects performed which are most related to the requirements of this project. Limit descriptions to those most relevant to this project and most representative of the vendor’s capabilities. References must be for goods and services provided within the last five years. Include the name of the client and a contact person, date of installation, software installed, any installation issues, and custom features or extensive report capabilities.

4. **Detailed Description of Proposed Solution**

Describe how the vendor will meet all of the functionality requirements listed in Appendix B: System Functional Requirements. Indicate for each of the requirements whether the software is fully compliant, requires a modification or is not available. Provide a timeline with proposed dates beginning with contract execution and ending with full implementation.

5. **Software and Hardware Platform**

Describe the software and hardware platform required and provide a brief explanation of any exceptions to the City’s standards.

6. **Data Conversion**

Describe how the vendor will convert current Utility Billing data into the new Utility Billing software. Conversion should include all historical consumption and financial data currently in the existing Utility Billing database.
7. Implementation and Training

This proposal shall include a detailed schedule, identification of project manager, team members, and key personal with resumes attached for all personnel involved.

Provide an installation plan as part of this proposal. This plan shall be detailed enough so that the City shall know every step of the installation process. Each task shall be broken out and described in detail.

Describe the approach and resources needed to implement the proposed software.

Provide user training approach that will properly prepare staff, supervisors and other personnel on the day-to-day use of the new utility billing software. Provide training approach that will properly prepare City Information Technology staff in the administration, management and any planned and unplanned maintenance of the new utility billing software.

8. System Testing and Acceptance

The City cannot accept the software until it has validated that the vendor has met all requirements stated in this RFP. The vendor shall provide all labor and supervision for the installation, testing, and final implementation.

The City, working with the vendor, shall develop acceptance procedures to ensure the software is installed properly and accepted. All software provided shall be tested to confirm that it is compliant with the current specification. All software is to be free from defects in design, material, workmanship, and is capable of sustained performance in the operating environment.

All of the software shall pass the tests described below and have the City declare that the objectives of the tests have been met.

- Free from operational defects.
- Compliant with all specifications and requirements.
- Delivered and accounted for; including all media, documentation, training and support items.

9. Warranty and Post Implementation Support

The vendor must warranty timely response and remediation of technical problems. If there is a system failure or other problems, the City needs to be assured that the vendor
shall respond immediately to correct problems so that the service is not disrupted in any way.

Describe all support resources available. The vendor should provide support that is capable of solving any software-related problems during all City business hours. Vendor must also supply a copy of the maintenance agreement that is proposed, as well as a description of the software maintenance services, terms, and dates.

10. Annual Maintenance and Upgrades

Vendor must provide the annual maintenance fees associated with the new utility billing software. It is expected that upgrades shall be available to allow the City to take advantage of improvements in both software and hardware capabilities. The vendor shall provide regular upgrades to the software from date of implementation. Describe the upgrade process.

11. Pricing

Provide detailed pricing of all costs to fully implement the successful operation of the proposed utility billing system. Include cost of software license fees, modification, implementation, training, hardware, add-on 3rd party software, annual maintenance, travel, data conversion, and any other anticipated costs.

Proposal Evaluation and Selection

The City will review submitted proposals and determine those that are most qualified. The City will select a vendor who in its sole judgment, best suits the current and future needs of the City. The evaluation criteria which are neither weighted nor prioritized include, but are not limited, to the following:

1. Understanding of the work required by the City.

2. Quality, clarity, and responsiveness of the proposal.

3. Demonstrated competence and professional qualifications necessary for successfully performing the work required by the City.

4. Recent experience in successfully performing similar services in city & municipal utility agencies in California.
5. Proposed approach in completing the work, and ability to implement the replacement in a timely manner.

6. Background and related experience of the specific individuals to be assigned to this project.

7. Fee structure and cost effectiveness of the proposal.

8. References.

The City will short list two or more vendors to continue with further evaluation. The short list will be selected using the criteria identified above. Additional discovery may be performed to assist in selecting the short list vendors. The short list vendors will be contacted regarding their status as short-listed vendors. The City reserves the right to award contract, or to forego awarding contract without notice.

If a short list of vendors is developed, the City will further evaluate short-listed vendor’s solutions by utilizing scripted scenarios that will demonstrate the ability to meet the requirements in Appendix B: System Functionality Requirements. Each short-listed vendor will be provided the scripted scenarios that they are to use to prepare for an on-site solution demonstration. The short-listed vendors will be further evaluated based on the results of reference checks, additional discovery and, at the option of the City, organized site visits at vendor’s customer sites. Vendors will provide the City with a list of three (3) potential customer sites. Customer sites should be using the same major version of the software being proposed to the City, similar in scope and complexity, and geographically close to City if possible.

Please note that on-site demonstrations for short-listed vendors are estimated to be held from April 23 - 26, 2012. Specific days and times for each short-listed vendor will be determined at a later date, but vendors should be prepared to conduct the on-site demonstrations during this timeframe. It is expected that the proposed Project Manager take part in the on-site demonstration sessions.

As reflected above, contract award will not be based solely on price, but on a combination of factors as determined to be in the best interest of the City. After evaluating the proposals and discussing them further with the finalists or the tentatively selected vendor, the City reserves the right to further negotiate the proposed work and/or method and amount of compensation.
Appendix A:
Current Utility Billing Process
Process Overview

City of Poway

Banner
Finance

Send transaction data (payments, deposits, accts receivable)

Itron-MVRS
(Handheld meter)

Send cycle accounts to be read

Receive file of accounts read

Send file of closed accounts going to collections

Collections

Send ACH payments file

Data sharing and syncing

City of Poway
Water Utilities system

Send billing detail file

Infosend
(Bill printing & online)

Receive PDF file of bills printed

Receive file of online bill payments

Receive file of customer bank payments

Receive file of lockbox payments

Union Bank
(ACH payments, bank payments, lockbox payments)

Poway GIS

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Enter New Service Location

Receive new service location form
- Public Works

SERVICE LOCATION INFO
APN
Service Location ID
Billing Cycle #
Service Class
Service Class Sub
Service Address
Description
Water Service Type
Water Pumping
Backflow
Sewer
Sewer Pumping

METER INFO
Meter Serial #
Make
Model
Size
Dials
Read Period
Initial Read
Meter Status

Enter info into water system - New Service Location screen

Print a copy of the form

Public Works copy

Customer Services copy

Enter New Account

New account application

Name on Account
Contact Name
Phone - Home, work, cell
Service Address
Service Class (i.e., Res, Ag, Comm, etc.)
Mailing Address
Driver's License

Enter application data into Water Utilities and scan application

hydrant meter?

YES

Set hydrant meter with backflow device

NO

Create service order

Unlock meter and get opening read
Reads / Billing

1. Create cycle reads file download.dat from Water Utilities
2. Import reads to MVRS meter reading system
3. Read meters in field
4. Extract reads from MVRS and create import.txt file
5. Print reads consumption proof reports (exceptions)
6. Create service orders for re-reads
7. Make corrections to reads based on re-reads. Also enter estimated reads
8. Print exception reports to verify read data
9. Calc bills
10. Create billing file to go to Infosend
11. Approve bills. Infosend to print and mail bills
12. Run miscellaneous reports - Billing Register, LMD register, etc...
13. Enter start reads
Service Orders

1. Problem or closing
2. Service order created in Water Utilities
3. Print service orders by date to be completed
4. Perform service order actions
5. Enter notes on service order and close the service order
6. Follow up on service order actions (contacting customers if necessary)
7. File the service order
Past Due Billing

Post past due

Create past due file

Send file to Infosend

Verify total

Approve past due bills on Infosend site

Make adjustments

Infosend pulls bills for accounts on payment plan
Tags and Shuts

Payments posted at 10am

Run process - Get Tags List

Verify the list of tags

Run the Tag list report

Print tags

Note added to account indicating account was tagged and the date

Stamp due date on tags

Meter readers tag customer locations

Received customer payment?

YES

Post payment

NO

Account advances to Shuts list

Run process - Get Shuts List

Verify the list of shuts. Note added to account indicating shut off and the date

Shut off water service to account

Received customer payment?

NO

Wait for customer response

YES

Post payment
Meter Exchange

Receive meter exchange form - Public Works

- Service Address
- Account #
- Date
- Employee #
- Old Meter Serial #
- Old Meter Type
- Old Meter Reading
- New Meter Serial #
- New Meter Type
- New Meter Reading
- Reason for Exchange

Location in current water billing cycle?

NO → Enter meter exchanges in Water Utilities system

YES → Hold meter exchange until after current cycle is billed and posted

Post billing cycle
Address Change

Receive list of address changes from Infosend
Account #
Customer Name
Service Address

Update water system with address changes

Enter address changes in Water Utilities system

Enter notes of address change on account
Appendix B: System Functional Requirements
Appendix B: System Functional Requirements

1. GENERAL FUNCTIONALITY

   a. Must be compatible with current IT infrastructure: Microsoft SQL data base and Windows Server 2008 R2 network operating system.

   b. Supports at least four full-time users concurrently, one administrator, and ten query only users.

   c. Includes user defined fields with parameters defined by the user.

   d. Uses wizards to expedite processes such as setting up new accounts, meter change outs and creating service orders.

   e. Provides various levels of security. Access should allow each user group to be granted full access, read-only access, or limited access. Allow for administration of user access and password administration.

   f. Provide administration including the ability to change or update field values within the system.

   g. Provides technical support for software and hardware at a minimum from 7:30 a.m. to 5:30 p.m. (Pacific Time) Monday through Friday.

   h. Interfaces to cash register, general ledger, meter reading, remittance processing software, parcel inventory, and mapping and web application.

2. CUSTOMER ACCOUNT AND LOCATION MANAGEMENT

   a. Support an unlimited number of accounts.

   b. Ability to define, add, change and delete an unlimited number of account types.

   c. Ability to query an account based on various search criteria such as customer name, account number, social security number, phone number, parcel number, service address, or meter number.

   d. Provides summary and detail level inquiry of customer records.

   e. Model accounts (templates) allow you to create new accounts by copying the model and changing the details.
f. Provides new account set up and account maintenance on-line real-time.

g. Provides user-defined fields to be maintained for each customer record.

h. Ability for unlimited notes on accounts with the ability to assign alert flags to accounts with notes.

i. Ability to provide an audit trail for changes to an account.

j. Support unlimited transaction and consumption history. History purging should be controlled by the user.

k. Accommodates new customers at an existing service change of address through an automated transfer function.

l. Ability to transfer customer balance, deposits and other occupant related information to a new account when a customer transfers to a new service address.

m. Provides ability to mark an account as an “internal” account.

n. Provides a CASS certification process to insure and maintain accurate postal information.

o. Ability to track information through system by customer. Ability to view all accounts that customer has had and current status of accounts.

p. Ability to track an unlimited number of user-defined events on an account (i.e. late notices, shut off, etc.).

q. Ability to display account information via web application.

r. Ability to track information through the system by contact or property. Ability to see all accounts at a given property (current and prior) and be able to view all accounts associated with a customer.

3. RATES AND FEES MANAGEMENT

a. Ability to define, add, change, and delete an unlimited number of rate code types and amounts.
b. Ability to define an effective date for rate tables and prorate charges based on the effective date.

c. Ability to define service rates that are consumption based, fixed, percentages, subtract meters, budget based, tiered, or seasonally averaged.

d. Ability to base charges for non-metered services such as sewer on water consumption with the ability to cap sewer charges based on average winter water use.

e. Ability to define distribution of fees to multiple general ledger accounts based on user-defined account type, fee category, service type, or reason code.

f. Ability to define, add, change, and delete an unlimited number of services types.

g. Ability to assess various types of penalties for high use during mandatory water conservation based upon various criteria such as water budget and percent reduction.

h. Ability to enter stop and start dates for individual fees on an account.

4. METER READING AND INVENTORY

a. Ability to define, add, change, and delete an unlimited number of meter types.

b. Ability to maintain an unlimited number of meters.

c. Ability to identify a meter by type, size, serial number, manufacturer, location, and install date.

d. Provides ability to enter meter reading data through data entry screens from hand-held devices or wireless automated meter reading system.

e. Service consumption automatically calculated upon entry of meter reading with ability to edit readings.

f. Allows concurrent meter reading data entry of one route while processing billing for another.

g. Maintains meter readings and dates independent of customer or account changes.
h. Provides ability to enter a meter change without interruption of the billing cycle and final billing.

i. Generates work orders based on meter reading exception messages and actions entered along with meter reading.

j. Ability to describe the location of the meter at a service location.

k. Ability to view a history of all meters that have been installed at the service location.

l. Ability to record unlimited notes for a meter.

m. Ability to define meter read types.

n. Ability to estimate meter reads based on user-defined history preference.

o. Ability to identify reads that were estimated versus actual reads.

p. Ability for system to automatically identify roll-over readings based on meter setup.

q. Flexible high/low feature that allows the user to set range of parameters that produces consumption edit register for screening variables such as high/low consumption, no current read, zero consumption, etc.

r. Ability to change out meters at any time. Where meters have been changed out, ability to show separate individual meter readings and consumption and to show total consumption and billing amount on the same bill.

s. Ability to change meter reading sequence without changing customer account number.

t. Ability to graphically display consumption history for an account.

u. Ability to display average consumption by month for an account.

v. Ability to view consumption history in numeric and graphical format via web application.

w. Maintains reading instructions, prints instructions on read sheets, and provides information in meter reading interface.
x. Allows user to flag individual accounts for which zero consumption is not considered to be an exception.

y. Ability to calculate a winter consumption average to be applied as a billing cap.

z. Ability to display and maintain record of past customer caps on their account.

aa. Prints meter route pages in customer number or route sequence number order.

5. BILLING MANAGEMENT

a. Supports a multi-cycle billing system.

b. Provides a complete or exception only billing pre-list for review prior to bill printing.

c. Allows printing of multiple cycles in one billing run.

d. Generates one utility bill covering all services and charges and itemizes charges separately.

e. Maintains a file of comments for inclusion on utility bills, reminder notices or shut off notices.

f. Provides user-defined free form message on bills.

g. Bill includes billing date, account number, service period, current read, prior read, consumption billed, itemized charges, balance forward, amount due, due date, numerical and graphical prior-same period usage, and average gallons used per day.

h. Generates a return stub so that cash receipts can be read with an optical character reader, scanning the account and amount.

i. Provides for billing re-start in event of printer jam.

j. Ability to view and reprint a past bill at any time.

k. Produces final notices.

l. Ability to produce statements for customers with multiple utility accounts.
m. Ability to sort bills by zip plus four to take advantage of postage discounts.

n. Ability to export bills to a file for 3rd party printing.

o. Ability to prorate bills for new and closed accounts.

p. Supports calculation of consumption using current and previous meter readings multiplied by user-defined multipliers (such as number of dwelling units).

q. Calculates final bills during any cycle based on the internal issuance of a turn off service order or closing a customer account.

r. Supports billing adjustments such as read errors, automatically adjusts billing amounts and history.

s. Allows printing of third party (dual notification) bills during bill run.

t. Ability to not print a paper bill and email the bill to the customer.

6. FINANCIAL MANAGEMENT

a. Allows positive or negative transaction adjustments with a complete audit trail.

b. System automatically generates the appropriate journal entries for “internal” accounts.

c. Provides automatic allocation of payments to billed service with ability to adjust or override the default distribution.

d. Accepts over-payment or credit adjustment with amount maintained as unapplied credit balance or be applied to the next service bill.

e. Provides complete audit trail of payments processed for reconciliation prior to general ledger cash posting.

f. Ability to generate a counter invoice detailing charges and balance due.

g. Ability to import payment records from bank website and remittance processing software.

h. Ability to accept full, over, partial, and pre-payments.
i. Ability to distribute partial payments based on user-defined preference (due date, service type, or percentage).

j. Provision for data entry correction of any distribution errors.

k. Provide for auto-pay option for customers to pay from customer’s bank account or credit card.

l. Ability to scan payment information directly into the system using a bar code or OCR scanner.

m. Ability to support payment arrangements for customers to schedule payments for outstanding balances.

n. Ability to recognize pending payments to prevent customers from being included on the shut off list.

o. Ability to display transaction history including bills, receipts adjustments, credits and refunds for an account.

p. Ability to display details of transaction and drill down to transaction.

q. Accepts only one deposit per customer account.

r. Ability to automatically apply deposits to a final bill or an account that has been in good standing for a user-defined period of time.

s. Ability to automate the credit/refund process by batch.

t. Ability to automatically apply deposits to the correct revenue accounts.

u. Ability to display account transaction history via web application.

v. Ability to pay outstanding balances or set up automatic payment from credit card or checking account via web application.

7. **DELIQUENCY MANAGEMENT**

a. Ability to age accounts in 30, 60, 90 and 120 day increments.

b. Ability to automatically add late penalties or interest to delinquent accounts according to a flexible rate structure determined by the user.
c. Automatic printing of shut off notices and service orders through interface to service order system.

d. Ability to produce delinquent bills for customers that have already received a final bill but continue to maintain an unpaid balance.

e. Automated special payment arrangements allowing customer to pay amount due over time.

f. Ability to automatically assess a charge to an account if a shut off is processed.

g. Allows selected accounts to be flagged as exempt from receiving past due notices.

h. Processes accounts for write off and collection.

i. Maintains a dynamic shut off list that can be automatically or manually updated.

j. Produces shut off and restore door tags for accounts that are being shut off.

k. Ability to deliver shut off and restore tags to account holders via email.

8. SERVICE ORDER MANAGEMENT

a. Ability to define, add, change, and delete an unlimited number of service order types.

b. Service order system provides automated updates to the utility system upon completion of service order.

c. A history of all service orders related to a service address should remain with the service address record. Service orders should provide drill down functionally for details of actual service order.

d. Ability to define a workflow for each service order type with automatic email notification to responsible parties.

e. Ability to automatically update customer, location, meter, and account information upon completion of service order actions.

f. Ability to print or email service orders based on user-defined selection criteria.
g. Ability to dispatch and receive completed service orders via email.

9. REPORTING

a. Includes standard financial, operational, service work order reports and audit trails.

b. Includes end user reporting tool to create reports based on any field combination or partial field within the utility billing system.

c. Ability to export reports to Microsoft Excel and Word.

d. Ability to generate a list of accounts, customers, or meters based on user-defined selection criteria.

e. Ability to generate analysis reports with user-defined parameters with flexible selection criteria and grouping options.