
ServicePoint Metered Equipment Option

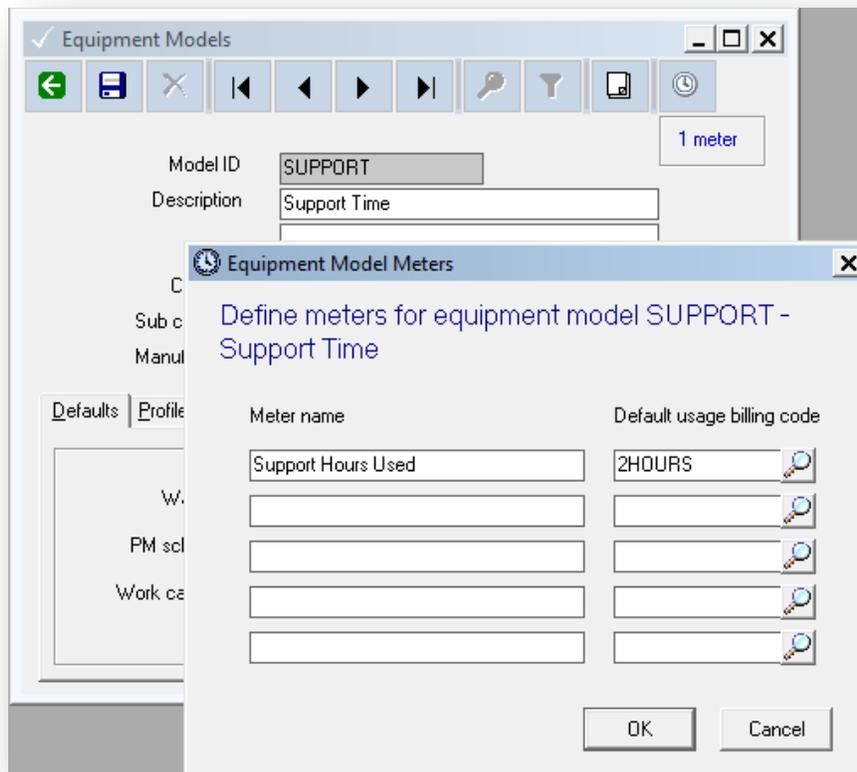
This document has been written to describe the features of the ServicePoint Metered Equipment option. These features have been designed to allow quantity tracking of usage for scheduling of recurring services based on a counter, as well as billing based on usage. The most common applications for the metered equipment option are billing of copier usage and billing prepaid blocks of time.

Setup Options

- **Control Information** – Metered Equipment is an additional option that may be purchased for use with a ServicePoint system. When licensed, an option exists in ServicePoint Control Information to turn the features on or off. The option is on the tab labeled “Flags/Other” as a checkbox called “Enable metered equipment features”.

Once the features are enabled in the Control Information, several new options will exist in the software.

- **Equipment Models** – When defining a model of equipment in ServicePoint setup, an option exists in the model maintenance menu bar to define meters. Clicking the Model Meters button will allow definition of up to five meters per model. Usage may be tracked for each meter separately, and billing of overage may occur for each meter individually, or as an aggregate of all meters. Meter definition consists of a name for each meter and an optional *usage billing code* to be used as a default for the type of billing when using this model for a customer.



- **Usage Billing Codes** – Usage Billing Codes are used to determine billing rates for specific types of usage. They can define up to six different levels of usage per code, along with a charge-per-use for each level. A typical setup for a time-based usage code is shown in the following screen. In this example, the first two hours of usage will result in no additional usage based charges, the next hour will be billed at \$90, and all usage in excess of three hours during a billing period will result in charges of \$125 per hour. Usage billing codes can be set up to bill based on Hours, Minutes, or Uses (copy counts).

Usage level		
From	Up to	Charge per use
0.00	2.00	0.00000
2.01	3.00	90.00000
3.01	UNLIMITED	125.00000

Operational usage and functionality

- **Customer Equipment** – When customer equipment is defined in a ServicePoint system that has the Metered Equipment features enabled, the chosen *model ID* is checked to see if it has one or more meters defined. If a meter is defined for the model, an additional tab appears in the equipment maintenance window labeled “Meters”. The meters tab, as displayed below, allows entry of a specific *usage code* (controls billing of overage) and will display accumulated usage information for the current billing period.

In the two screenshots below, a time usage example is shown with a single time-based meter, and a second example of a copier with multiple meters defined is included.

Customer Equipment - Contract 1004

Contract 1004

Customer: 100001 American Insurance Company
 Address ID: "MAIN"
 Model ID: SUPPORT
 Serial number: <none> Quantity:
 Description: Support Time

General | Contract info | Profiles | Meters

Support Hours Used

Usage billing code: 2HOURS
 Start reading:
 End reading:
 Credits:
 Net usage: 0.00
 Warning level: None
 Maximum allowed: N/A
 Overage charge: 0.00
 Last reading date:

Support Hours Used

Customer Equipment - Contract 1004

Contract 1004

Customer: 100001 American Insurance Company
 Address ID: "MAIN"
 Model ID: CANON12003E
 Serial number: A00132190W Quantity:
 Description: Canon 1200 3E Copier

General | Contract info | Profiles | Meters

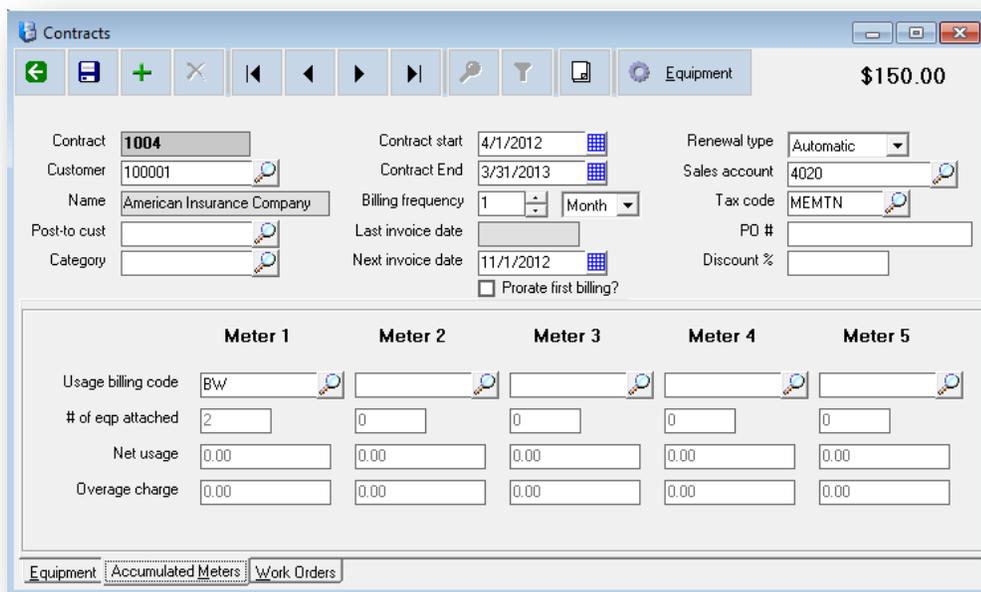
Black/White Copies

Usage billing code: BW
 Start reading: 2,712
 End reading: 2,712
 Credits:
 Net usage: 0.00
 Warning level: None
 Maximum allowed: N/A
 Overage charge: 0.00
 Last reading date:

Total Copies | Black/White Copies | Color Copies

- Contracts** – Contracts are used to bill for prepaid usage in advance, and also to bill for any overage in arrears. The billing amount specified in each equipment record in the *Contract Info* tab is billed on each invoice, according to the frequency entered into the contract record. Usage amounts are accumulated between invoices. Any amounts due for accumulated usage, according to the *Usage Billing Code* assigned to the meter, are billed during the next billing cycle.

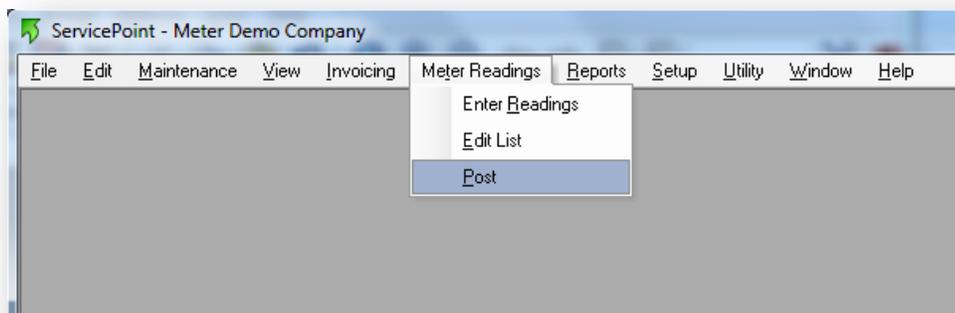
There are two types of meters for which usage charges are calculated. A meter that is attached to a piece of equipment that has a usage code assigned will calculate usage billing amounts individually. A second option exists, which is to assign a “roll-up” meter to an equipment meter. The roll-up meters are assigned using the  button in the equipment meter screen. A roll-up meter is accumulated at the contract level, and can have multiple equipment meters assigned. The affect of using a roll-up meter is to have the readings for all meters aggregated together before calculating overage according to the usage billing code assigned to the specified contract roll-up meter. A single contract can have up to five roll-up meters in use. Roll-up meters can be viewed in a contract using the “Accumulated Meters” tab in the contract maintenance or view window.



The screenshot shows the 'Contracts' application window. At the top right, the contract value is \$150.00. The main area contains contract details for Contract 1004, Customer 100001, and American Insurance Company. Below this is a table with five columns for Meter 1 through Meter 5. Each column contains fields for Usage billing code, # of eqp attached, Net usage, and Overage charge. At the bottom, there are tabs for Equipment, Accumulated Meters, and Work Orders.

	Meter 1	Meter 2	Meter 3	Meter 4	Meter 5
Usage billing code	BW				
# of eqp attached	2	0	0	0	0
Net usage	0.00	0.00	0.00	0.00	0.00
Overage charge	0.00	0.00	0.00	0.00	0.00

- **Meter Readings** – Readings for a meter are entered and posted using the *Meter Readings* selection in the ServicePoint menu.



Readings are entered for any meter for a specific piece of equipment using the *Enter Readings* function. Reading types are “Regular” and “Exchange”. An exchange reading will reset the current reading to a new value without generating any usage for the transaction. A credit may be issued to allow for any uses that should be credited to the customer for refunds, copies used during service, etc.

Customer: 100001
 Address ID: "MAIN"
 Model ID: CANON12003E
 Serial number: A00132190W
 Description: Canon 1200 3E Copier
 Reading date: 10/12/2012

Meter name	Last reading		New reading		
	Date	Reading	Type	Reading	Credit
Total Copies		3,215	Regular	4,682.00	
Black/White Cop		2,712	Regular	3,157.00	
Color Copies		1,912	Regular	2,287.00	12

After readings are entered, an edit list may be printed. Posting the readings will update the customer equipment meters and remove the pending reading transactions.

- Work Order Labor Time** – When a work order task is entered, the piece of equipment assigned is checked to see if a time-based meter (hours or minutes), has been defined. If a meter using a time-based counter exists, an additional option exists for entering usage. Entering labor time onto the task will display a checkbox called “Generate usage?”, as displayed in the following screen image. Checking this box will post a meter reading to the time-based task item in the amount of the calculated labor time. The effect of this is to track the time spent against a pre-paid block of time sold in a service contract.

Work Orders, 10731 American Insurance Company

Work order: 10731 Customer: 100001 Status: LOG
 Open date: 10/1/2012 Address ID: "MAIN" Priority:
 Time: 5:29 PM Name: American Insurance Company

General info | Task Detail | Labor | Parts Used | Additional Charges | WQ Summary | Profitability

Lbr_Seq	Tech_ID	Work_Description	Hourly_Price	Hours_To_Bill	Date_For_Sched
10	ANDERS	Browser assistance	.0000	.50	2012-10-02 00:00:00
> 20	WILSON	Network support	.0000	.75	2012-10-08 00:00:00

Seq # 20 Tech ID WILSON William Wilson III
 Work description Network support
 Hrly rate 0.00 Hrs to bill 0.75 Ext price 0.00
 Schedule Dispatch Start 10/8/2012 2:34 PM Stop 10/8/2012 3:12 PM
 Tax Generate usage

Seq # 10 Task name Monthly Telephone Support Invoicing code TM-F
 Model SUPPORT Serial <none> Description Support Time

- Contract Coverage Billing** – Contract invoicing is the process by which any accumulated coverage is billed. Usage is accumulated between billing periods, and any calculated overage is billed along with the next invoice. In the example below, 4.25 hours have been accumulated since the last months billing. Using the previously shown 2HOURS usage billing code, an overage amount of \$246.25 is calculated using \$0.00 for the first two hours (included in the contract), 90.00 for the third hour, and \$125 per hour for the remaining 1.25 hours.

Customer Equipment - Contract 1004

Customer: 100001 American Insurance Company
 Address ID: "MAIN"
 Model ID: SUPPORT
 Serial number: <none> Quantity:
 Description: Support Time

General | Contract info | Profiles | Meters

Support Hours Used

Usage billing code: 2HOURS

Start reading: End reading: 4.25 Credits: 0.00 Net usage: 4.25
 Warning level: None Maximum allowed: N/A Overage charge: 246.25 Last reading date: 10/12/2012

Support Hours Used

Any readings that are entered between contract invoicing periods are considered when calculating overage to be billed during the next invoice cycle. After calculated overage amounts are billed and the invoice posted, the accumulated usage for the period is reset to zero, so that any usage amounts entered will be reflected in the next following invoice cycle.

Meter Demo Company
 645 Tournament Lane
 Memphis, TN 38138
 800-I-LUV-SPAS

Invoice

Date	Invoice #
10/12/12	20046

American Insurance Company
 1654 South Broad St

Service Contract billing
 for the period of
 11/01/2012 - 12/01/2012

Contract #	Category	Customer #	PO #	Terms
1004		100001		

<u>Model / Serial #</u>	<u>Manufacturer</u>	<u>Description</u>	<u>Amount</u>
CANON12003E A00132190W		Canon 1200 3E Copier	
		Equipment overage charge	13.35
SUPPORT <none>		Support Time	150.00
		Equipment overage charge	246.25

Contract overage 78.25

Thank you for renewing your service agreement with us!

Equipment subtotal	487.85
Sales tax	49.83
Payments received	0.00
Balance Due	\$537.68