Utility Billing | Introduction & Setup

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The instructions in this article relate to ***Utility Billing.*** The icon may be located on your *StrataMax Desktop* or found using the *StrataMax Search*.

Utility Billing allows the facility to create bills for owners or tenants for any electricity, gas or water usage based on meter readings. It also provides a billing solution for marina funds and air conditioning, using Levy Management to create bills. This functionality is maintained via a 'Sub-Group', which can be changed by selecting from the *Main* to the *Utility*, next to the building selector tool when using this type of function.

Data can be imported from the main building, also referred to as a 'group', to create debtor accounts in the sub-group to reduce the need for manual entry. Bills are issued to either the owner or the tenant, and available for distribution to each contact via email or post.

This module can manage full arrears, similar to that in the main group when running regular levies and automated fee applications. When combined with StrataPay, this creates an easy system for reconciling the payments to the relevant lot in the subgroup.

Where the word 'Electricity' is used, this can be changed to 'Water' or any other utility used in the *Utility Group*.

We also have the Sub-Groups | Basic Setup Video, which covers this process.

Sub-Group Types

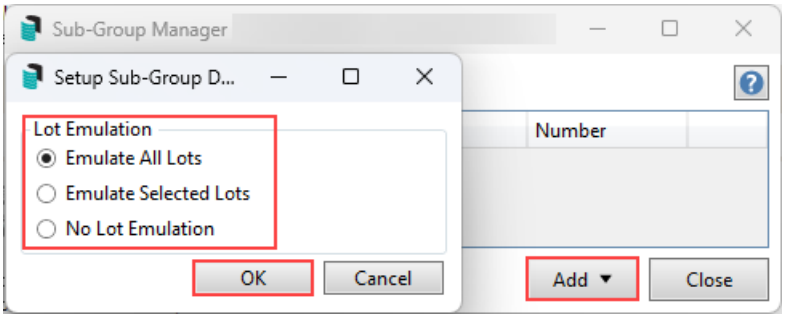
The following types are available to set up in the Sub-Group area and will issue the following:

- Marina - Issues levies via ***Levy Management***.
- Utilities - Issues utility bills based on usage via ***Utility Billing***.
- Air Conditioning - Issues levies via ***Levy Management***.
- By-Laws - Issues invoices via ***Debtor Invoices***.

Sub-Group Setup

A building must exist before a sub-group can be applied. While setting up this sub-group, it is recommended that the building be locked.

1. From the *Main*, search or select ***New Sub-Group.***
2. Click *Add,* and from the *Sub-Group* section, select the type of sub-group you wish to set up.
3. The Lot Emulation section is configured based on the Debtor Maintenance records' intended actions.
    - *Emulate All Lots* - Copy all lot owners' accounts from the main group in the building to the sub-group.
    - *Emulate Selected lots* - The user can tag which owner lot accounts to copy into this sub-group.
    - *No lot emulation* - No owner lot account will be copied. The user can set them up individually as required using ***Debtor Maintenance***.
4. Click *Close* once the Sub-Group has been created.



If an existing sub-group already exists and new lots are added to the Main, there will be an option to add these new lots to the *sub-group* simultaneously.

Delete Sub-Group

Deleting a sub-group can be managed in the same window from which the setup is done. Deleting a sub-group can be done if the billing is no longer required.

1. From the *Main*, search or select ***Delete Sub-Group***.
2. From the Sub-Group manager screen, click the red cross on the sub-group type.
3. Click *OK* to message: *Are you sure you want to delete the subgroup EXXXX?*

Sub-Group Debtor Maintenance (contacts)

The sub-group will use these debtors to bill each contact. They can be made up of owners and tenants and include agents where needed. What has been set for the lot emulation will dictate how these debtors are entered and maintained with ***Debtor Maintenance.***

Bank Account Setup

The bank account details, such as BSB and bank account details, should be included, and the same main operating account will be used. This information is populated from the *Main* building. When generated on the bill, the Payment Reference numbers allow the payment to settle to the correct account, and are different between the *Main* and the *Sub-Group.*

1. In the main building, open the ***Bank Account Setup*** menu.
2. Enter a New Operating Bank Account.

Edit Bill Title

Depending on the type of utility being billed, the wording from the standard Electricity wording used on the bill templates may need to be changed to reflect the utility type. The instructions below will allow the description and measurement defaults to be changed. Income account 101 must be linked first to open the utility billing area using the below instructions.

1. From the Sub-Group building, search or select ***Utility Billing***.
2. Select File / Edit Bill Title.
3. Amend / check the title to reflect the intended utility type. Click *OK*.
4. Amend / check the unit title and adjust it to reflect the usage type.

Marina | Levy & Arrears Notice Email Templates

Levy and arrears notices in Marina Sub-Groups will utilise the local *Levy* or *Arrears* notice email template if one has been set up. Please refer to the ***Email Template Manager*** article to learn how to manage email templates.

Utility Bill Template (Display Multi-Tariffs)

Where multiple Tariffs are required, the display can produce the rate along with the Tariff name on the utility bills.

1. From the Utility Sub-Group, search or select ***Utility Billing.***
2. Select *File > Configure.*
3. Select *Show 1st Tariff Rate with Name.*
4. Select *Close.*

