

Course 122

Accountant Role :

Setting up Prepaid Facilities, Ledgers and Connectors

Ledger : Courtney Flat 1 [Help](#) [Log-out 0094f1](#)

Transactions for Ledger: Courtney Flat 1

From: 2011-09-27 18:21:15.8 to 2011-11-02 18:21:15.8

Opening balance: R 0.00

document number	date & time	amount	transaction type	description	running total
1	2011-11-01 11:18:11.924	150.00	RECEIPT	Received Cash	150.00
2	2011-11-01 11:20:15.996	-150.00	INVOICE	Received Cash	0.00
3	2011-11-01 11:47:23.028	150.00	RECEIPT	Received Cash	150.00

Closing balance: R 150.00

The NEXT Generation AMR

**Gives you the power to
configure your own
Smart Prepaid metering
AMR, via an easy to use
Web interface**

Previous Course Requirements:

- 102- Technician - Installation of Meters
- 120- Accountant - Configuring Tariffs, Time of Use Calendars and Meter Accounts
- 121- Accountant - Checking, Running and Exporting Bills
- 131- Admin - Configuring Custom Accounts and Permissions
- **Advisable:** Elster PMU training, specifically to be able to use PMU to switch an AS230 on and off with an optical eye from a laptop, in other words not through the modem.

Once you are done with this Course, you should be able to:

- Configure a Breaker/Connector
- Create a Ledger
- Setup a Prepaid Facility
- Create a minimalistic Role and Login for viewing prepaid balance only.
- Setup SMS notifications to Clients when their balance run low

- **Introduction:**

- *A Prepaid Facility is the logic that lets the meter behave as a prepaid meter.*
- *In order to create a Prepaid Facility, we need a:*
 - *Meter*
 - *Breaker/Connector*
 - *Meter Account*
 - *Tariff (prepaid) for that Meter Account*
 - *Ledger*

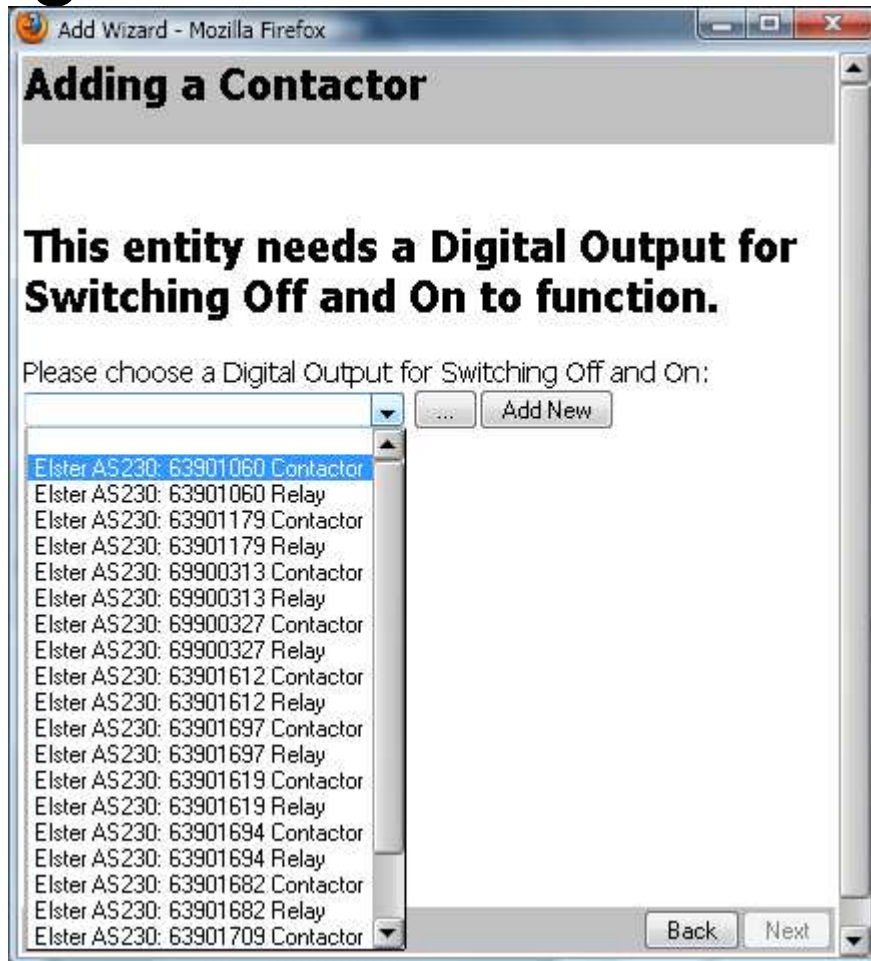
MODULE 1:

Configure a Breaker/Connector



- A breaker/connector in PnPScada allows us to connect or disconnect lines.
- A contactor is a type of breaker/connector and an Elster AS230 has such a contactor.
- For this we will need a AS230 that is already setup on your account. (see Course 102)
- Log in to Plug and Play Scada.
- Note the Serial Number of the meter you want to add a contactor to.
- Add a Breaker/Connector Entity
- Choose a Contactor

- Select the meter that you want to add a contactor to, by using the serial number



- Provide a proper name (Usually the same name as the meter)



- Click Finish

Exercise

Module 1

Exercise

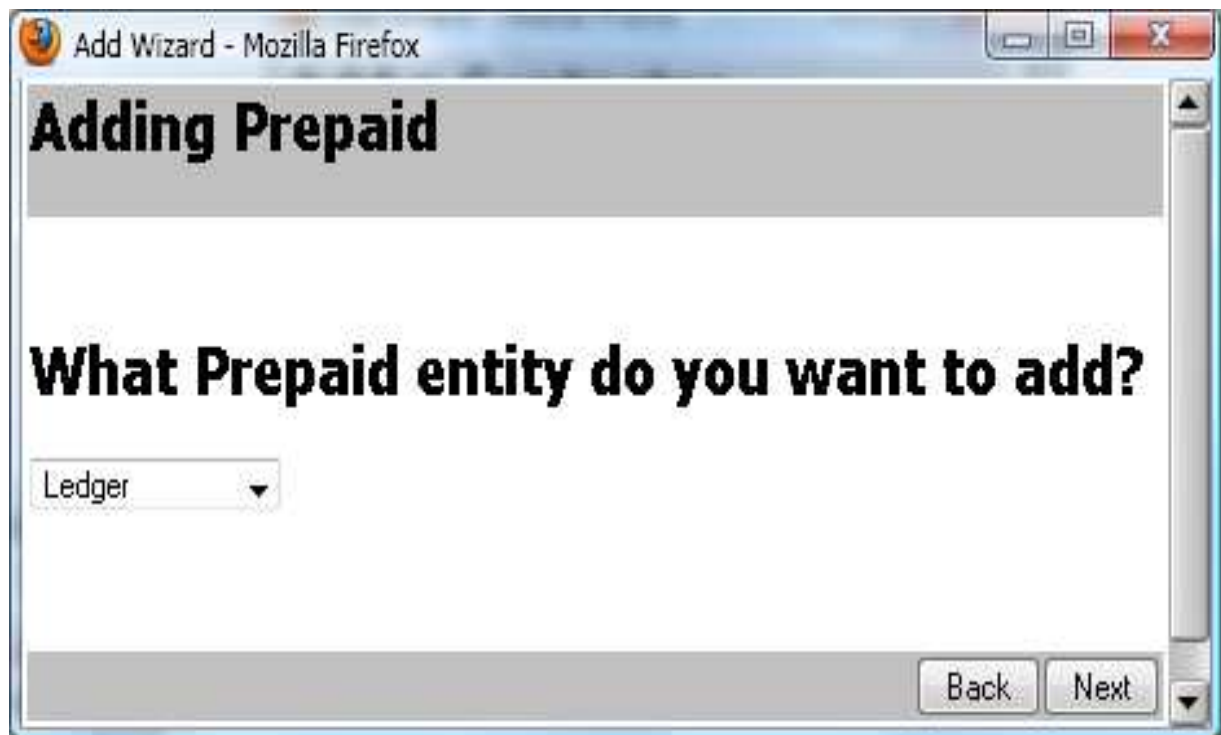
Add an Elster AS230 and with a contactor.

Give the AS230 and the contactor the name “Melrose Arch Flat 1”.

Call the Lecturer if you have any questions, and when you're done.

Module 2:

Create a Ledger



The screenshot shows a web browser window titled "Add Wizard - Mozilla Firefox". The main heading is "Adding Prepaid". Below this, the question "What Prepaid entity do you want to add?" is displayed. A dropdown menu is shown with "Ledger" selected. At the bottom right, there are "Back" and "Next" buttons.

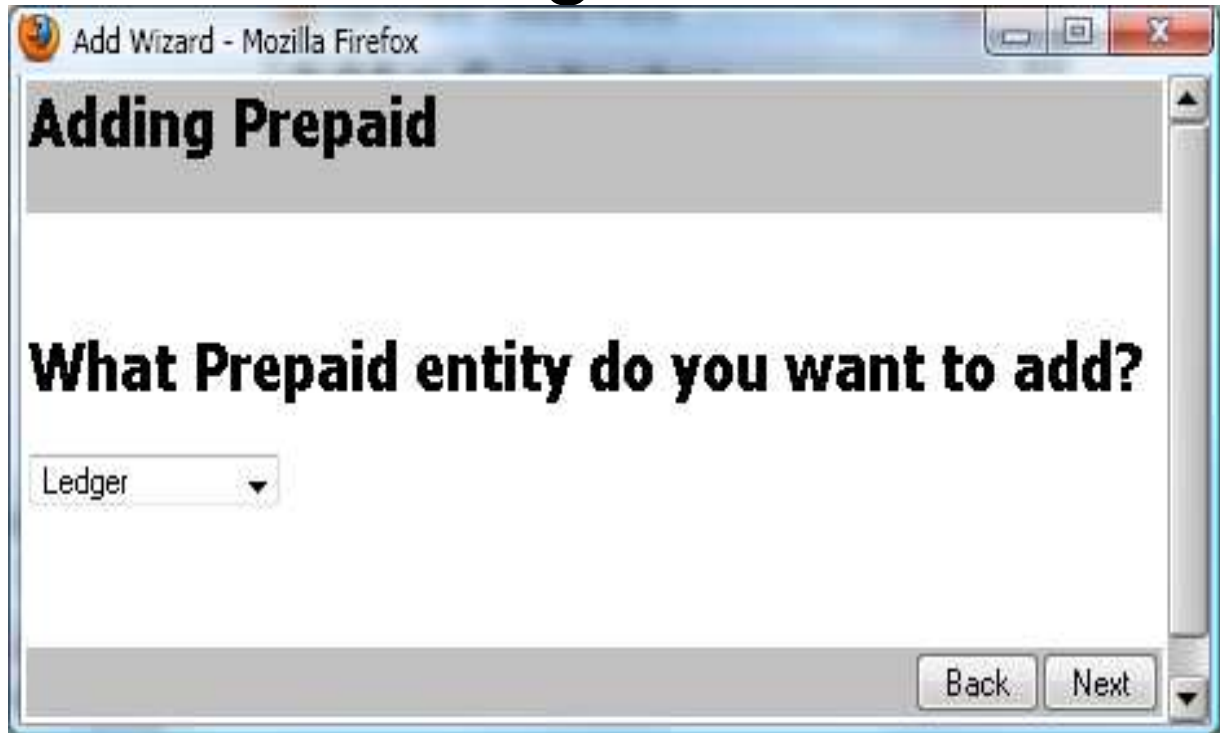
Adding Prepaid

What Prepaid entity do you want to add?

Ledger ▼

Back Next

- A Ledger stores all monetary transactions.
- Add a Prepaid Entity
- Choose Ledger



- Enter the ledger name (usually the same name as the meter account)
- You will need to specify an opening balance.
Note: if the Ledger's balance is R0.00, the Prepaid Facility will immediately open the

connector once it is created.

- Bills will be calculated from the opening date for the Ledger.



The screenshot shows a web browser window titled 'Add Wizard - Mozilla Firefox'. The main heading is 'Adding a Ledger'. Below the heading, there are three input fields with labels: 'Ledger Name :', 'Opening Balance :', and 'Opening Date :'. The values entered in these fields are 'Melbourne Court Flat 1', '0.00', and '2011-11-01' respectively. At the bottom of the form, there are two buttons: 'Back' and 'Finish'.

Ledger Name :	Melbourne Court Flat 1
Opening Balance :	0.00
Opening Date :	2011-11-01

Back Finish

Exercise

Module 2

Exercise:

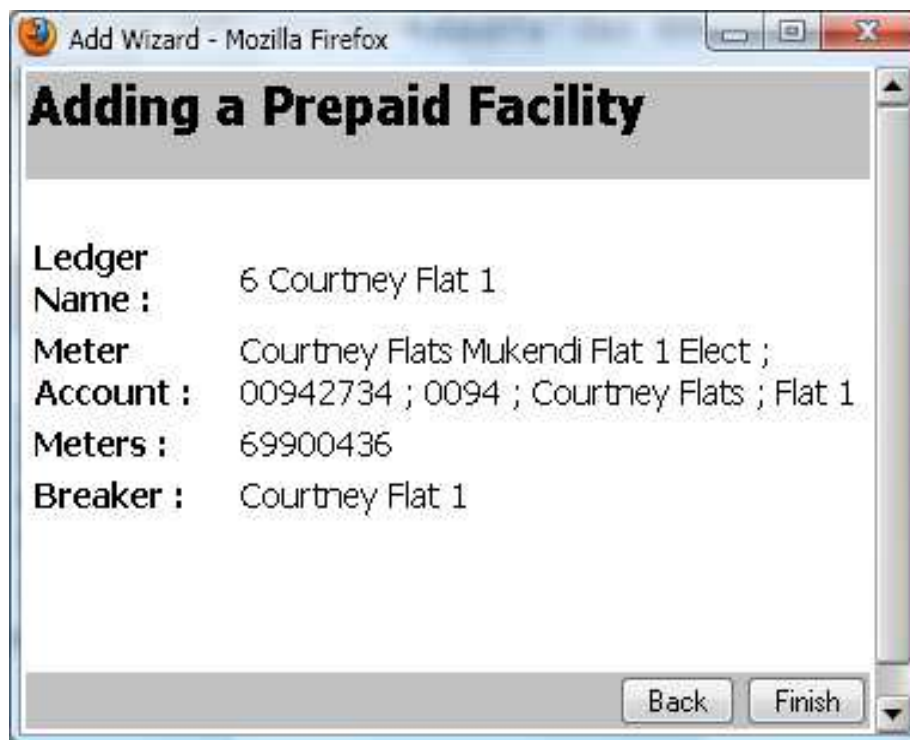
Add a Ledger to the system with the name “Melrose Arch Flat 1”.

Let the Open Date be the start of the next month.

Call the Lecturer if you have any questions, and when you're done.

MODULE 3:

Setup a Prepaid Facility

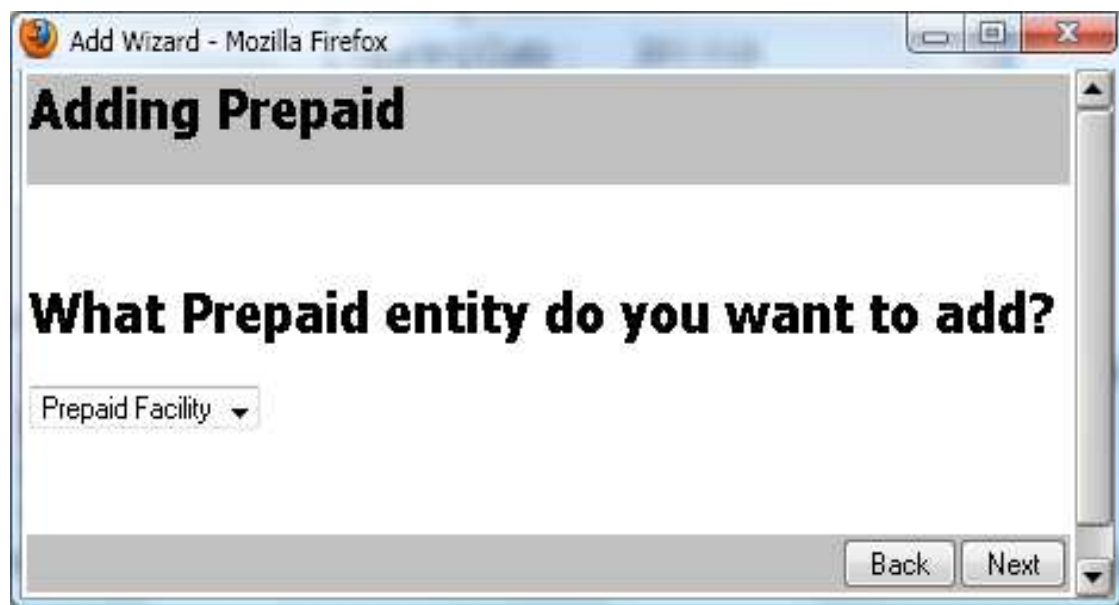


The screenshot shows a web browser window titled "Add Wizard - Mozilla Firefox". The main heading is "Adding a Prepaid Facility". Below this, there are several fields with labels and values:

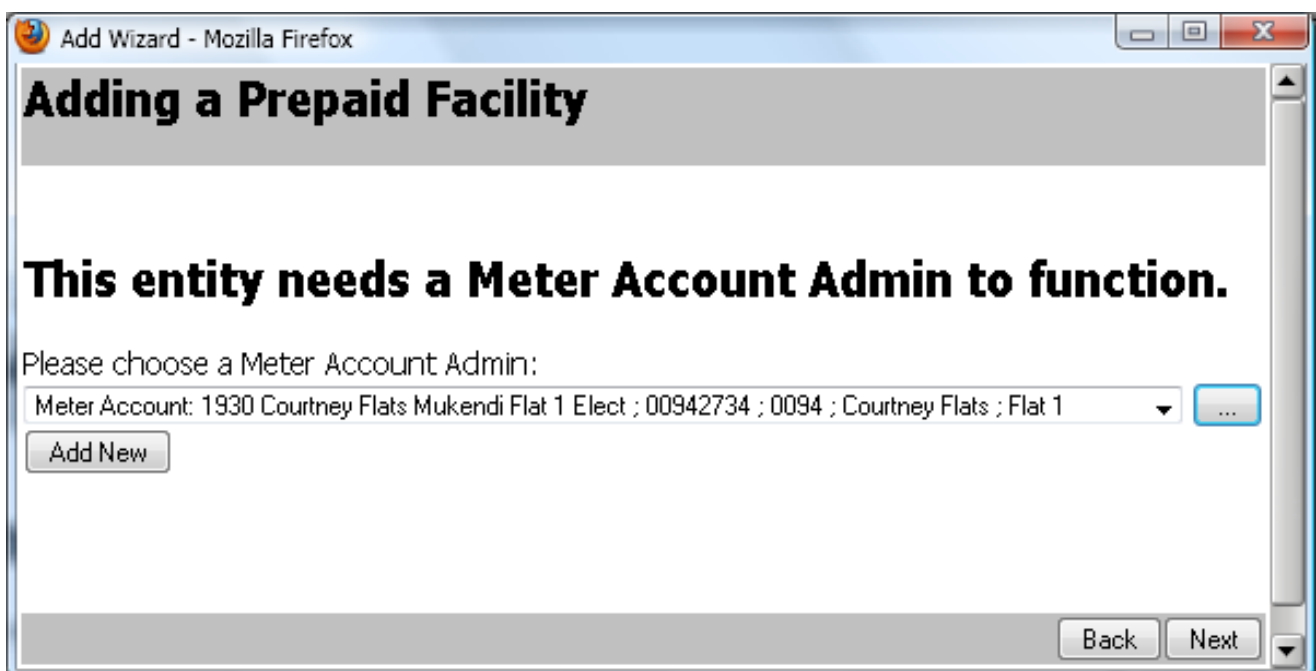
Ledger Name :	6 Courtney Flat 1
Meter Account :	Courtney Flats Mukendi Flat 1 Elect ; 00942734 ; 0094 ; Courtney Flats ; Flat 1
Meters :	69900436
Breaker :	Courtney Flat 1

At the bottom right of the form, there are two buttons: "Back" and "Finish".

- Every time a meter is read, the Prepaid Facility will automatically calculate the bill from the meter's consumption, and then switch the Breaker/Connector accordingly.
- For this we will need a:
- Meter account with the prepaid tariff already selected
- Ledger with an opening balance of more than R0.00 (unless you want the facility to switch off immediately)
- Breaker/Connector
- Add a Prepaid Entity
- Choose Prepaid Facility

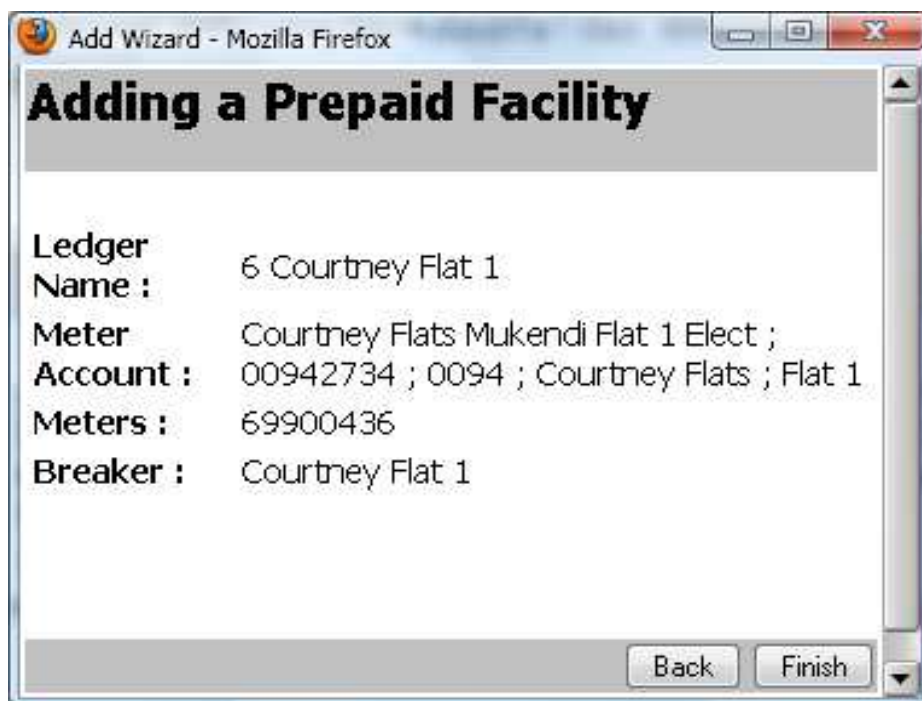


- Select the appropriate Ledger.



- Select the meter account
- Select the Breaker/Connector that will be switched off
- A meter account may be paying towards multiple

meters (e.g. a flat's own meter as well as common area lights at the swimming pool). **However, the prepaid facility will only open the Breaker/Connector that is directly linked to the Prepaid Facility.** i.e. only one (specified) breaker will be switched.



- Make sure all information is correct

- Click Finish
- The Prepaid Facility will be added with the meter number of the breaker in its name.

Exercise

Module 3

Exercise:

Discuss how a fixed tariff line item will impact the prepaid account.

Discuss how multiple meters in the Meter Account will effect the Breaker/Contactor switching.

Make sure there is a Meter Account for the AS230 in module 1 with an appropriate Prepaid Tariff.

Create a Prepaid Facility and link up:

the AS230's contactor that you created in module 1

the Meter Account for this meter

the Ledger in module 2

Call the Lecturer if you have any questions, and when you're done.

MODULE 4:

Create a minimalistic Role and Login for viewing prepaid balance only

Add Wizard - Mozilla Firefox

Add Role

Role Description: Courtney Flat 1

☐ No Add Restriction (all types of entities can be added)

☒ Specify which Types of Entities may be Added

- Accumulators - RMS Accumulators
- Breaker/Connector - Contactors
- Breaker/Connector - Latched Breakers
- Calendars - TOU Calendars

☐ No Functionality Restriction (all interfaces of entities may be used)

☒ Specify which Entity Interfaces may be Accessed

- Intelligent Active GPRS Modem
- Ledger**
- Load Admin
- Load Control

☐ No Entity Restriction (all entities belonging to Urban Real Estate can be 'seen')

☒ Specify which Entities may be Accessed

- Breaker/Connector : Courtney Flat 1 (4895)
- Breaker/Connector : Courtney Flat 10 (4900)
- Breaker/Connector : Courtney Flat 11 (4901)
- Breaker/Connector : Courtney Flat 12 (4986)

Back Finish

- At some point the person paying for the prepaid account will want to know their balance.

For this reason we almost always create a login with every prepaid account.

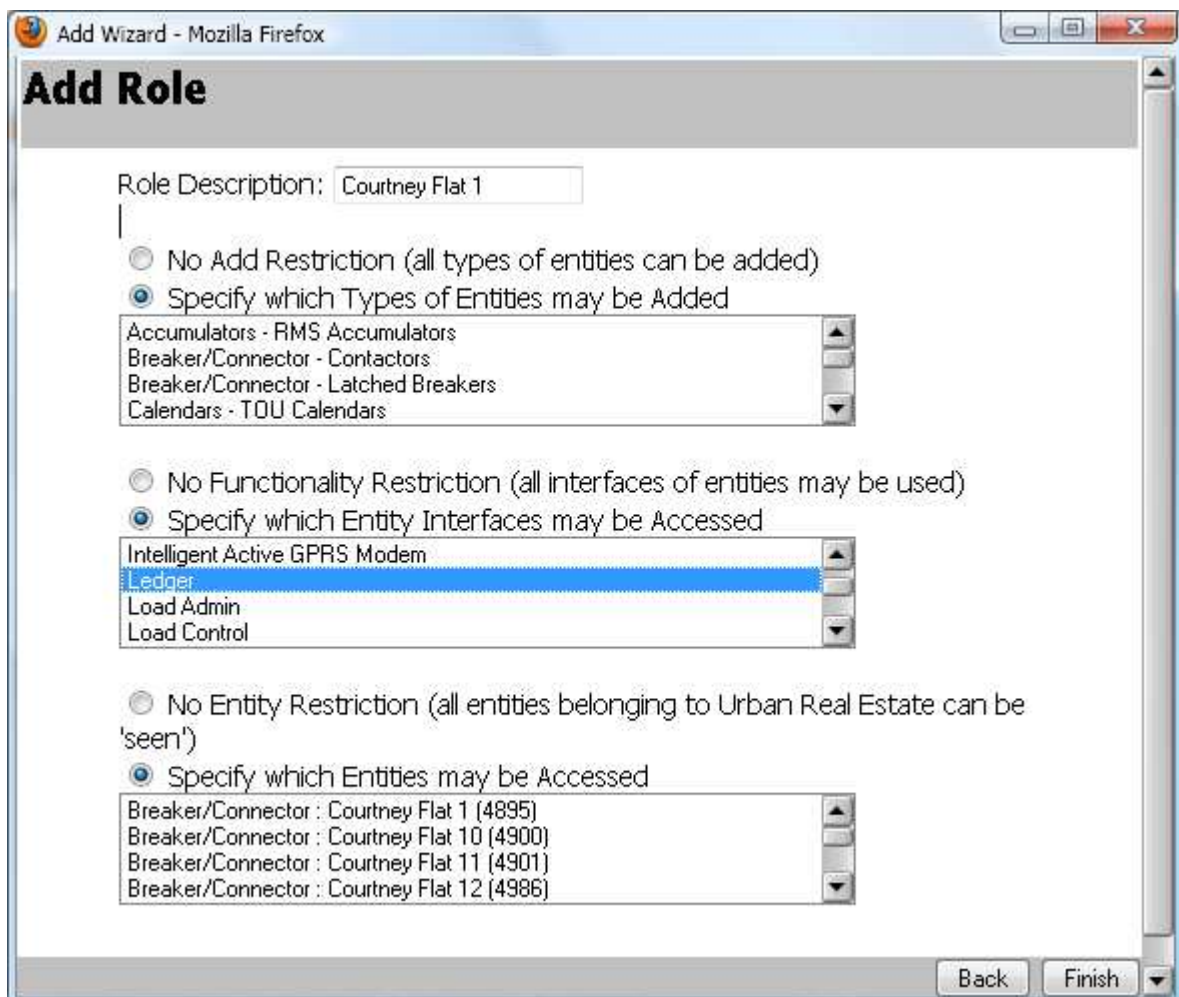
- Add a User Admin Entity



- Under “This entity needs a Role to function” click “Add New”
- Select your organization



- Click Next
- Enter the Role Description as the Meter Account name



- Select “Specify which Types of Entities may be Added”

- Do not select any entities to add, as the login do not require any adding of entities
- Select “Specify which Entity Interfaces may be Accessed”
- Select only “Ledger”
- Select “Specify which Entities may be Accessed”
- Do not select any entities to access (we will select the correct entity later)
- Click Finish
- Continuing on the previous “Add Login Wizard”, click on Next

Add Wizard - Mozilla Firefox

Adding a Login Account

This entity needs a Role to function.

Please choose a Role:

Organization Role: 15000038 Courtney Flat 1/Urban Real Estate

Back Next

- Enter the first name as Meter Account name (just for convention).
- Provide the other details

Add Wizard - Mozilla Firefox

Add Login

First Name * Courtney Flat 1

Last Name

Email Address
(will be used to contact you about your account)

☐ Email my account information to this address.
(This will use the SMTP protocol, which is plain text and not encrypted).

Cell Phone Number

Choose a Login Name * FLAT1
(no spaces or special symbols)

Choose a Password *
(use at least 6 characters)

Confirm the Password *
(re-type the password)

Back Finish

- Click Finish

- Since we do not want the user to do anything but view their balance (like not change their password), we are going to hide all other functionality using a Custom Menu.
- Add a “User Admin Entity”
- Choose Customized Menu
- Give the menu the name “Prepaid Menu”



- Click Finish
- Back at the Overview Screen, select the Role you just created

Overview

Dependencies

User Admin entities

Organization

id: [15000000](#)

Name: Urban Real Estate

Selected Entity

User Admin entities

Organization Role

id: 15000038

Role/Organization: Courtney Flat 1/Urban Real Estate

[unselect entity](#)

[remove entity](#)

[share entity](#)

- From the menu select Edit → Role
- Set the Start Page to be View → Ledger Transactions (Ledger)

Successfully Changed Role.

Role Description: Courtney Flat 1 Custom Menu: Prepaid Menu

Start Page: View→Ledger Transactions (Ledger)

- ☐ No Entity Restriction (all entities belonging to Urban Real Estate can be 'seen')
- ☒ Specify which Entities may be Accessed

Add... [none invert](#)

☒ Ledger : Courtney Flat 1 (6)

Update

- ☐ No Functionality Restriction
- ☒ Specify which Entity Interfaces may be Accessed

[none invert](#)

☐ Instrumentation Profile (Instrumentation)
☐ Intelligent Active GPRS Modem (GPRS Modem Status, GPRS Modem Logon Statistics)
☒ Ledger (Ledger Transactions)
☐ Ledger Admin
☐ Load Admin (Edit Load)
☐ Load Control (Switch Load)
☐ Login Account Admin (Zoom to Login, Set Login Notifications)
☐ Login Account Edit (Edit)
☐ Maestro Edit (Edit)

- ☐ No Add Restriction
- ☒ Specify which Types of Entities may be Added

[none invert](#)

☐ Accumulators - RMS Accumulators
☐ Breaker/Connector - Contactors
☐ Breaker/Connector - Latched Breakers
☐ Calendars - TOU Calendars
☐ Digital Output - Generic Modbus Coils
☐ Elster Wavenis - Elster Wave Flows
☐ Elster Wavenis - Elster Wave Port
☐ Elster Wavenis - Elster Wave Talkers
☐ Etherpads - Active Etherpads
☐ Etherpads - Passive Etherpads
☐ Load Controller - Demand Controllers

- Click “Add” and select the Ledger that you want the user to view.

- Under Custom Menu select “Prepaid Menu”
- Click Update
- Logout and login as the user you just created

Ledger : Courtney Flat 1 [Help](#) [Log-out 0094f1](#)

Transactions for Ledger: Courtney Flat 1

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Closing balance: R 150.00

- You should see the Ledger view dates default to the last 5 weeks.

Select the Ledger

- Go to Edit->Ledger Events
- Set the Low Limit and the Low Low Limit in Rands.
- Submit Query
- Your limits are now set.
- Make sure that the Role for the customer has the correct CommunitySMS login details set up.
- Make sure that the Role or Login for the customer has the Ledger notifications enabled in his Edit->Role Notifications screen or his Edit->Login Notifications screen. Please note that the notification

checkbox must first be set, and submitted, and then when it is on, the SMS checkbox must also be checked and submitted.

Exercise

Module 4

Exercise:

Create A Login for the Prepaid Facility that you created in module 3.

You should not be able to do anything on the system but view a list of your transactions.