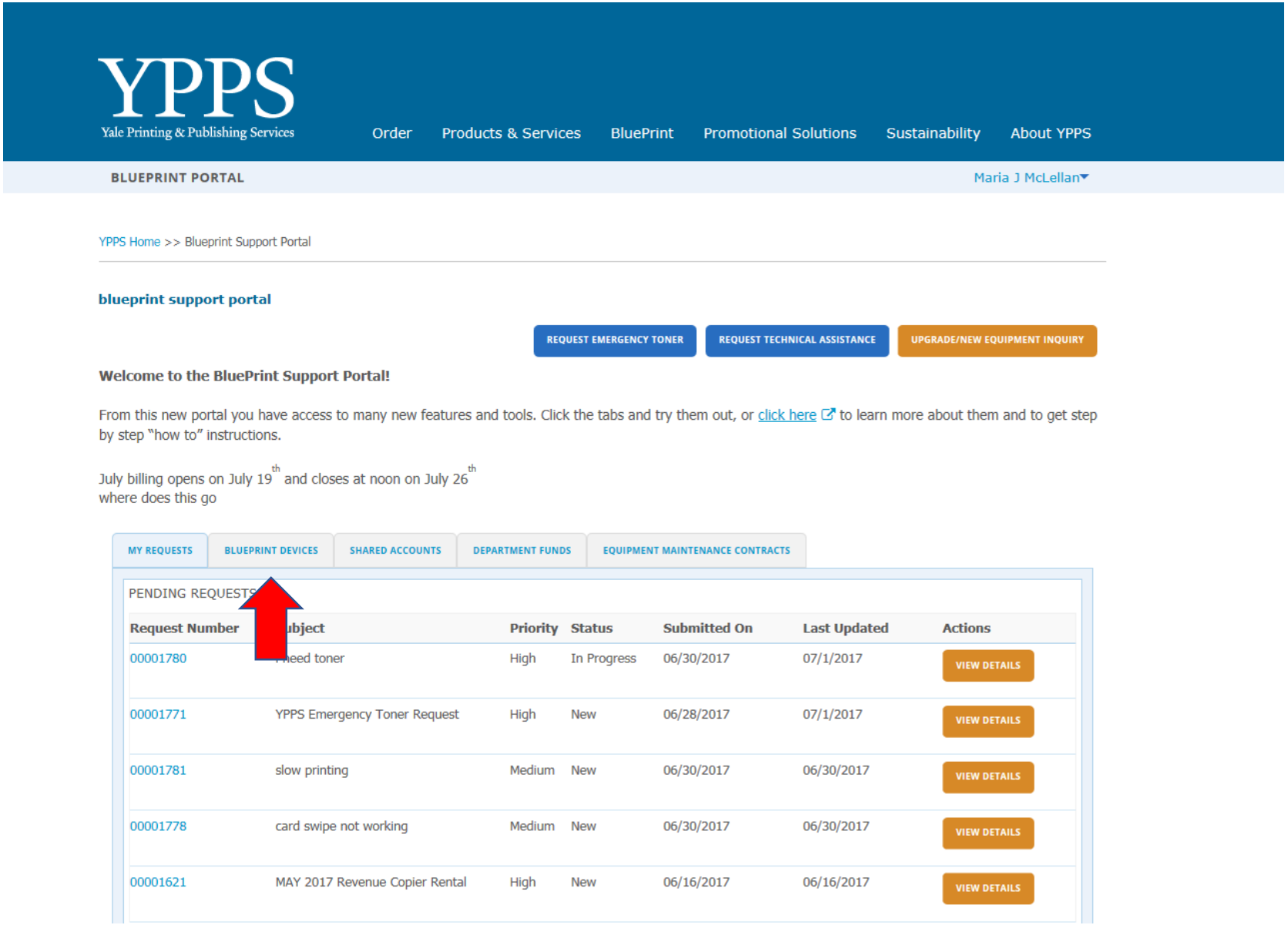
Meter reads: how to guide

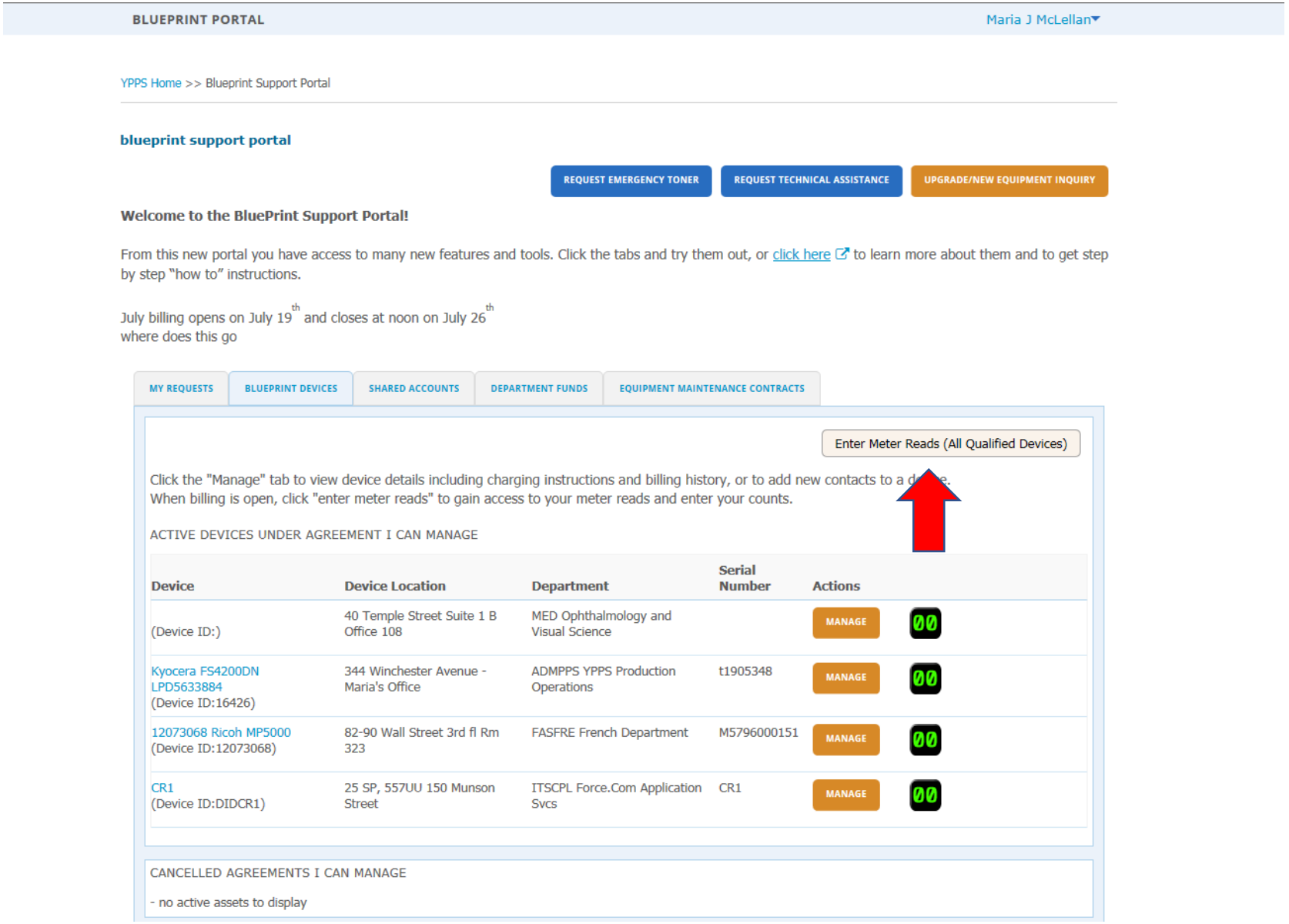
A customer arriving at the portal will see this screen first -- after they have successfully logged in with their CAS NetId & Password.

- Direct the customer to choose the “BluePrint Devices” tab



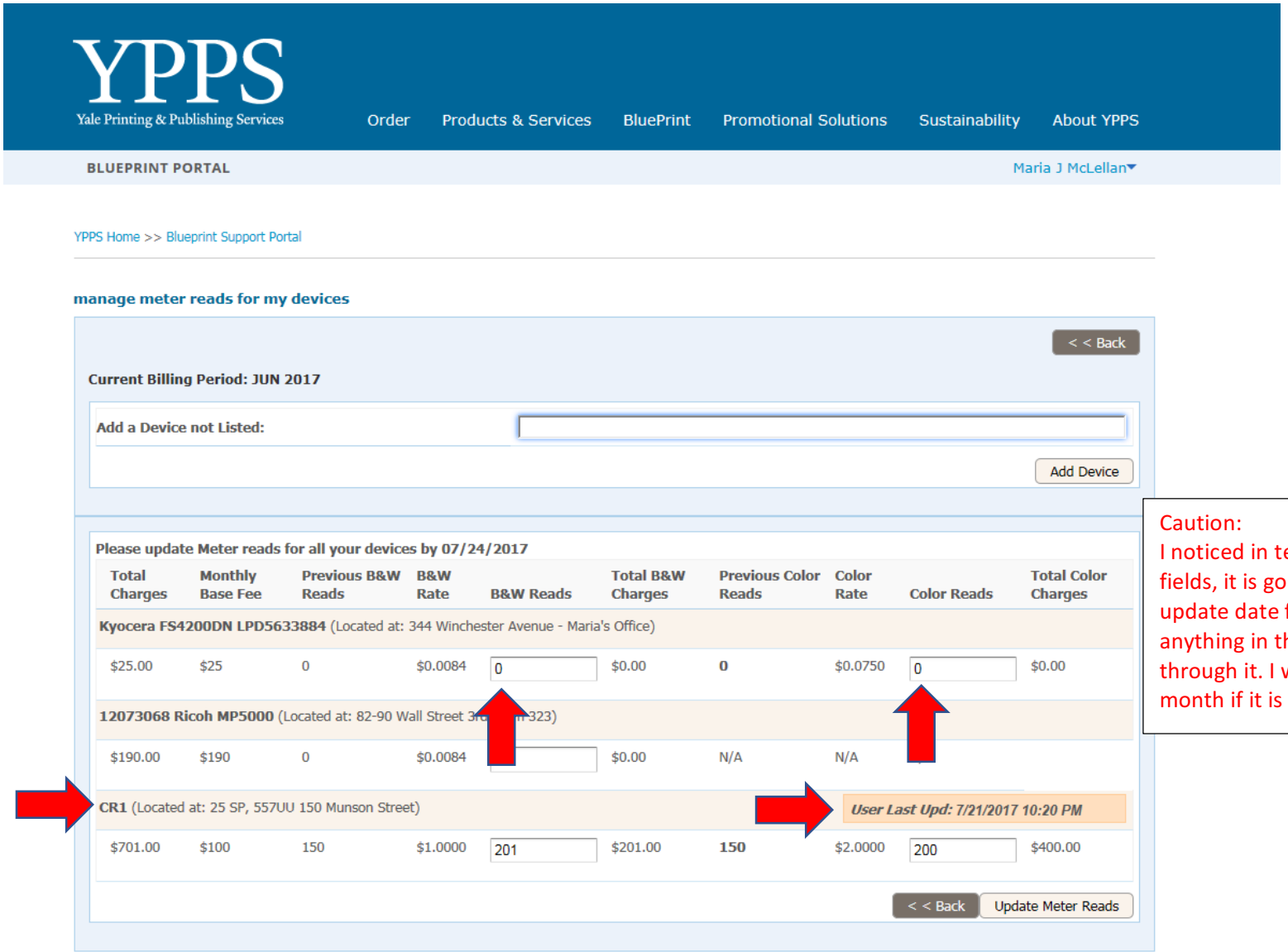
From this page, the customer should see the devices that they can manage. For “meter readers” these will be all of the devices that they have been asociated with in SalesForce. Only meter readers will receive an e-mail at the opening of Billing. However, anyone that has a contact role in Salesforce will also be able to manage devices as well.

- Meter readers should choose “Enter Meter Reads (All Qualified Devices)



On this page the meter reader will see a list of their devices. The devices that we **did not** "pick up" with our FM Audit pull will show at the top of the list.

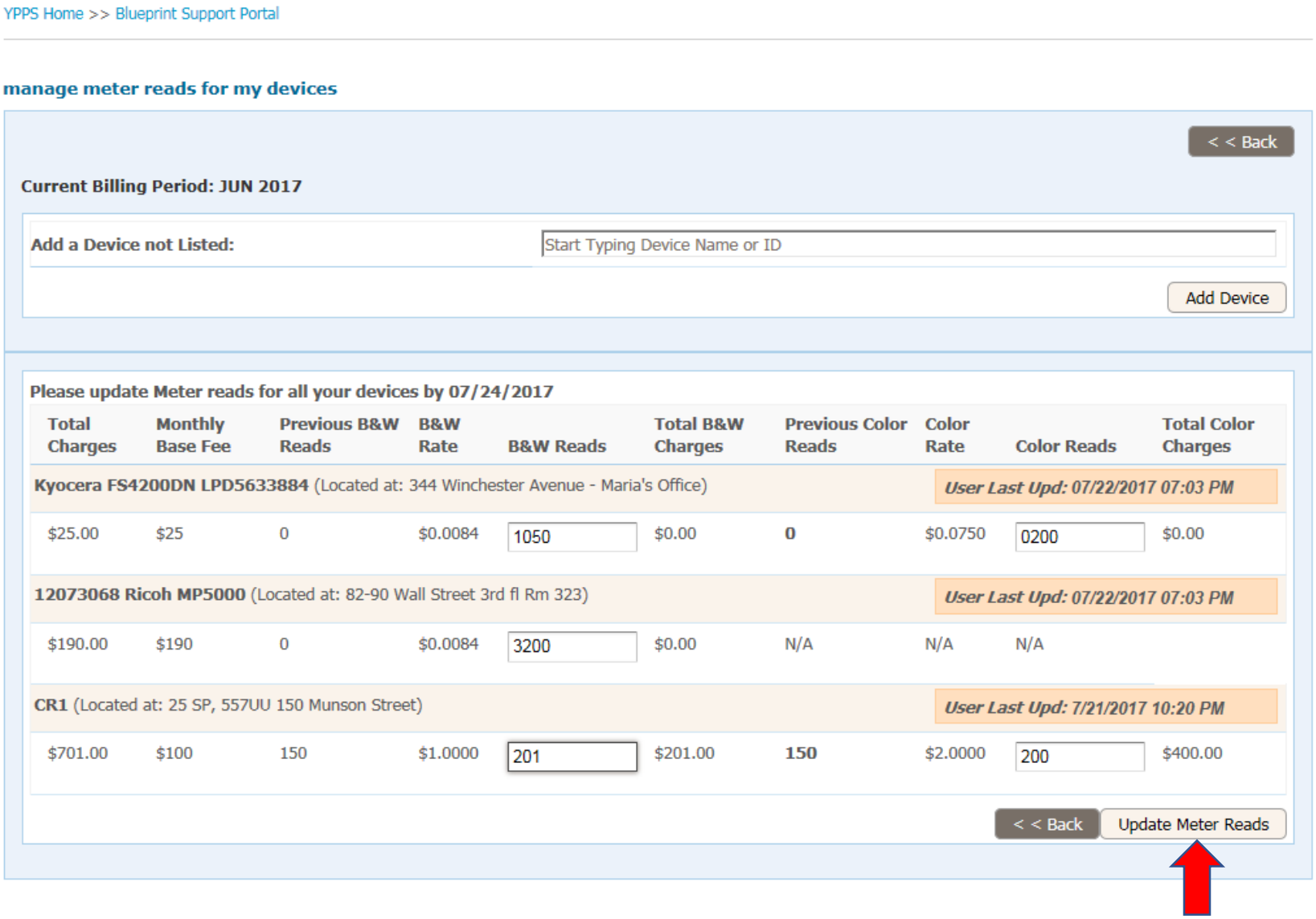
- User should click on the "0" in the appropriate column (B&W Reads or Color Reads") and enter their total count for each read that applies
  - The new screen new includes device location – this should reduce some of the confusion for customers with a long list
  - They will also see the reads that we picked up from FM Audit. They do not have to adjust those unless they want to.
  - If someone already entered a read, they will see the last update date as well



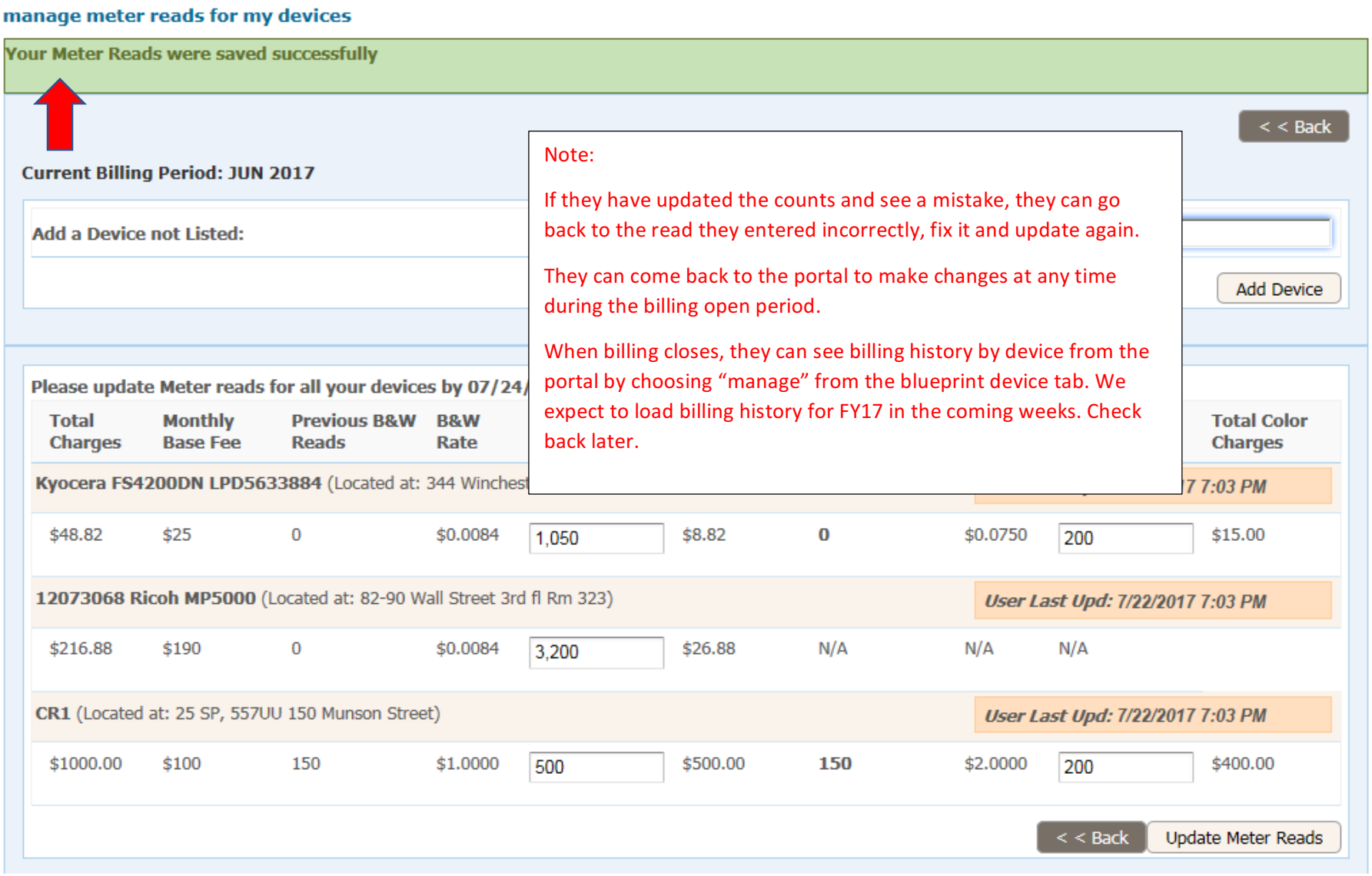
Caution:
I noticed in test, that if you tab through the fields, it is going to take you into the last update date field. They should not put anything in this field – they should tab through it. I will get FAST to fix that for next month if it is an issue in production as well.

After the Meter Reader has entered all of their reads, they should click on Update Meter Reads tab at the bottom of the screen.

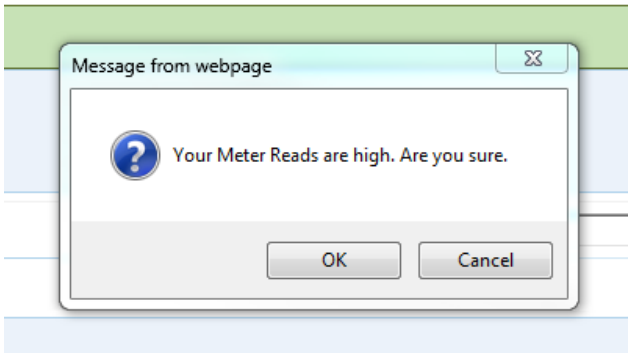
- Note – Date and Time last modified was update after I filled in my reads
- If they don't update, and they click "back", their changes will not be registered.



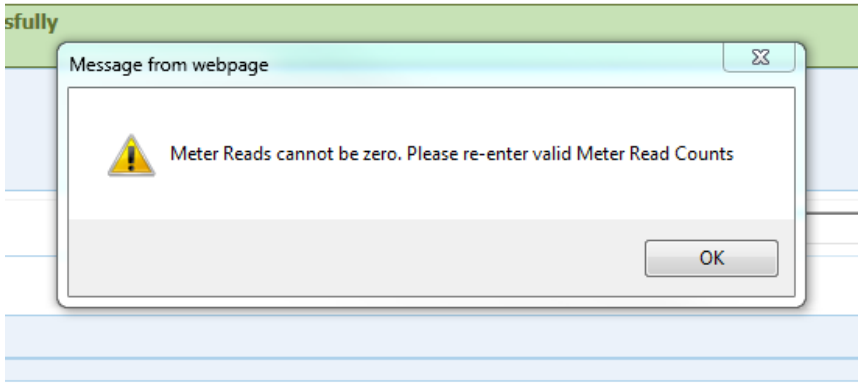
When they hit “Update Meter Reads”, they will get a message at the top of the screen indicating their changes were successfully updated



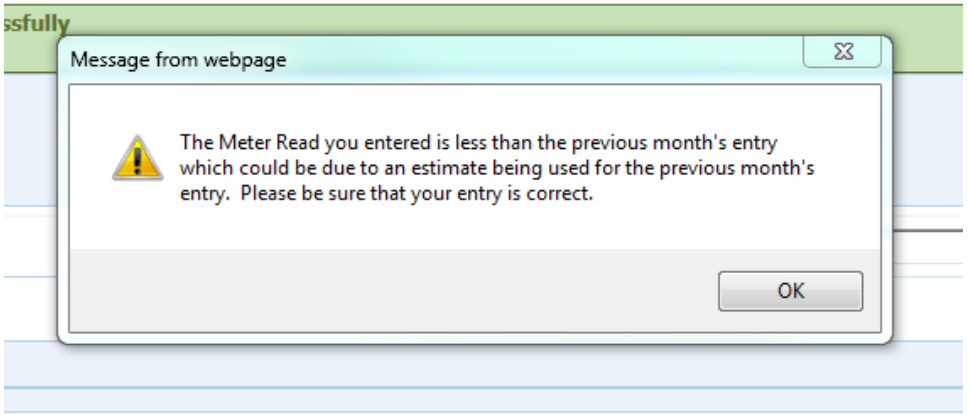
Some Common Error Messages and what they mean:

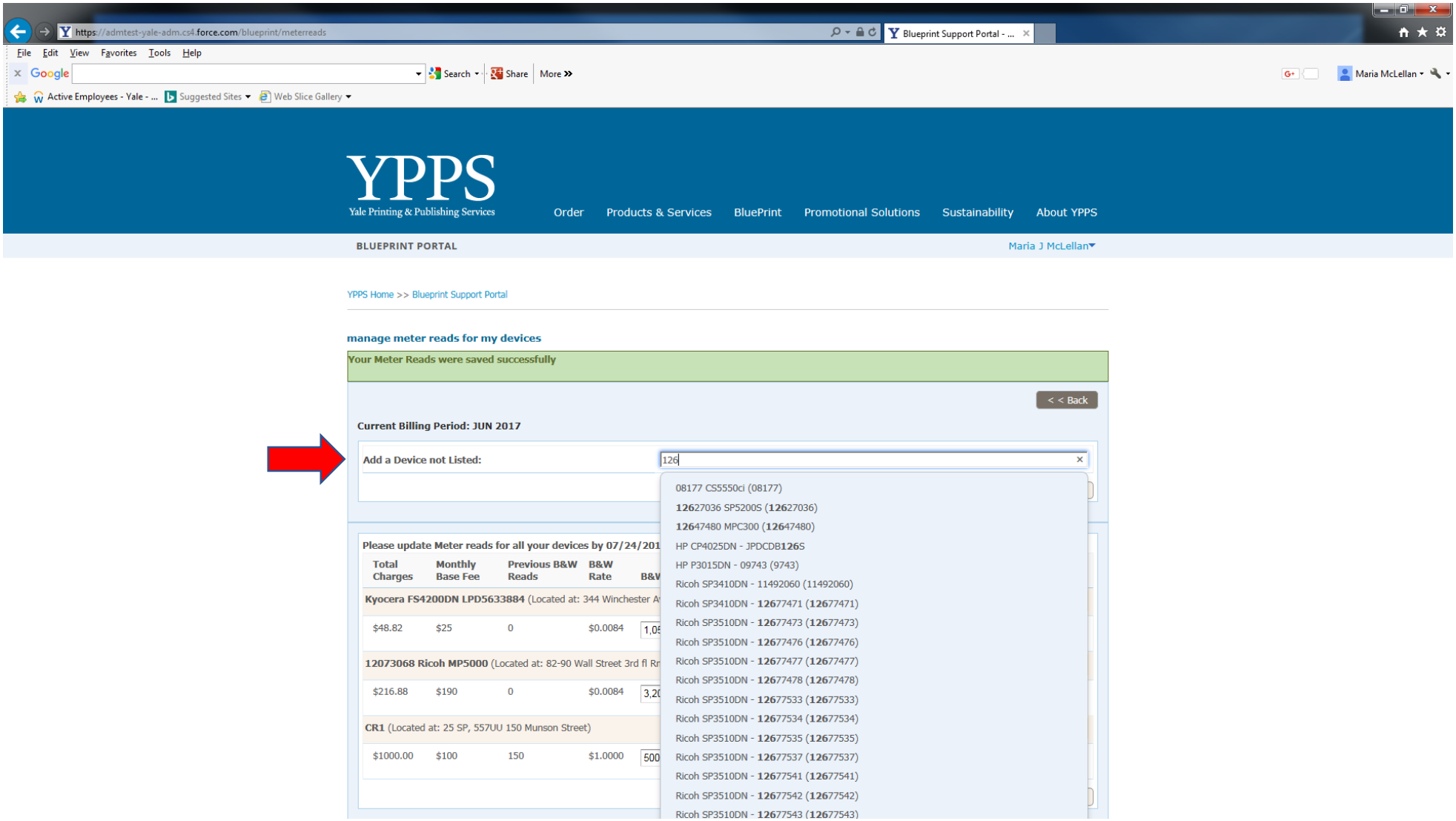


If the count entered calculates a fee over a certain threshhold, Salesforce will ask if you are sure. Maybe you have entered the wrong count, or an extra zero, or maybe you entered your B&W read in the color column?



This one is obvious – you can't enter a zero in the total read column.



This one is more difficult to explain. Occasionally, a count is entered incorrectly or estimated too high. When the meter reader gets the correct count the next billing cycle, if it is lower than the last count, then SF will caution the meter reader that the count is lower than last month. Since they have already been billed for those clicks, I would suggest they just add 1 to the current count until we catch up. They can always correct it if they prefer, but I would advise them not to as they will be technically be paying for the same clicks twice – better for them if they just add one until we catch up.

If they need to enter a read for a device that is not on their list, they can easily pull up the device by typing the device id in the box provided. As they begin typing the ID, SF will bring up a list of IDs by Id #. They should check the location before the add a meter read though to make sure they have the correct device.