

# **GAS MANager**

## **Version 9**



# **EBill User's Guide**

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# **GAS MANager EBill User's Guide**

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## ***License Agreement***

Permission to use the GAS MANager EBilling software is granted through the GAS MANager License Agreement.

## ***Disclaimer***

Custom Data Centre (Stettler) Ltd. accepts no liability for direct, indirect, incidental or consequential damages resulting from the use of this software.

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## Introduction

GAS MANager EBill is an optional GAS MANager software product intended to provide GAS MANager users with the ability to deliver bills to customers via Internet Email. GAS MANager EBill prepares bill forms in PDF format and Emails them to those customer accounts that have been identified as desiring to receive their bills via Email.

This software can also be used to send a message to a single recipient with, or without, an ebill attached. In addition, GAS MANager EBilling can attach a common file attachment to an email message to a single recipient, or to all EBilling customers, with, or without, an ebill attached.

GAS MANager EBilling is installed automatically during the installation of GAS MANager. However, the program will not operate unless the EBilling module has been licensed from Custom Data Centre. To order this license upgrade, send a completed GAS MANager Order Form to Custom Data Centre. A GAS MANager Order Form can be found on our web site at [www.customdatacentre.com](http://www.customdatacentre.com).

Before attempting to send an ebill to a customer, it is suggested that you verify the customer's email address by sending them an email message using your regular email client. This message should also ask your customer to send a reply to your message. If you do not receive the expected reply, then perhaps your email message was not delivered, or the email address that was provided by your customer was incorrect.

In addition to licensing and installing the software, implementing GAS MANager EBilling requires that the following activities be performed:

- Each Account that is to receive their bill via email must have the EBill selection on the Account record in the GAS MANager database set to "Yes".
- A valid email address must be specified on the Customer record in the GAS MANager database for each Account that is to receive their bill via email.

Once these conditions have been met, those accounts whose GAS MANager database records have an EBill flag that has been set to "Yes", and also have an email address will no longer receive a printed bill form during the normal billing process. These accounts must now be processed by GAS MANager EBilling in order to receive a bill.

Any computer that will be used to perform EBilling must have access to an outgoing (SMTP) email server.

# Chapter 1 – Email Setup

Before you can begin emailing bills to your customers, you must first be confident that your Email settings have been specified correctly. From the main GAS MANAGER EBilling window, click the **Settings** button.

The email Settings area is used to provide the program with the information that is necessary to connect to your outgoing email server and send an email message.

The screenshot shows a software window titled "Town & Country Gas Co-op Ltd. GAS MANAGER EBilling". The main content area is titled "GAS MANAGER Email Settings". It contains several input fields and checkboxes:

- From Email:** A text box containing "ebilling@customdatacentre.com".
- Email Host:** A text box containing "mail.customdatacentre.com".
- Port:** A spin box set to "1025".
- Options:** Two checkboxes: "Use Secure Sockets Layer (SSL)" and "Use Default Credentials", both currently unchecked.
- User Name:** A text box containing "ebilling@customdatacentre.com".
- Password:** A text box with ten black dots representing a masked password.

Below the settings is a section titled "Test Email Message" with three text boxes:

- To Email:** An empty text box.
- Subject:** An empty text box.
- Message:** A larger empty text box for the email body.

At the bottom of the window is a toolbar with four icons and labels: "Save" (checkmark), "Reload" (refresh), "Send Test Email" (envelope), and "Close" (X).

## From Email

- The email address from which you wish to use to send the EBill messages.
- This address will appear as the sender email address on EBill messages.

## Host

- The name or IP address of your outgoing email (SMTP) server.
- This is usually in the form of a server name that includes your email domain but it may also be specified as an IP address.

## Port

- The standard port for SMTP is 25.
- If your mail server requires the use of a different port, provide the proper port number.

## SSL

- If your SMTP server uses secure logins, check the Secure Sockets Layer option.

## Default Credentials

- If your SMTP server requires the use of default credentials, check the Default Credentials option.

**User Name**

- Enter the user name that you use when sending email from the Host.

**Password**

- Enter the password that is associated with the above User Name.

If you are unsure about what values you should be providing in the above email Settings you should contact your computer systems administrator, your Internet service provider, or your email service provider. You may also be able to copy these settings from your regular email client software. Shown below are the settings that should be used for some common email domains.

<b>Domain Name</b>	<b>Data Field</b>	<b>Contents</b>
<b>telusplanet.net</b>	From Email	townandcountrygascoop@telusplanet.net
	Host	smtp.telusplanet.net
	Port	25 or 1025
	User Name	townandcountrygascoop
<b>telus.net</b>	From Email	townandcountrygascoop@telus.net
	Host	smtp.telus.net
	Port	25 or 1025
	User Name	townandcountrygascoop

Once you have provided the necessary Email Settings, send a test message to your email address to confirm that the settings are correct. Complete the Test Email Message section and click the **Send Test Email** button. If your test message is received successfully, click the **Save** button to record your settings.

Town & Country Gas Co-op Ltd. GAS MANager EBilling

### GAS MANager Email Settings

From Email

Email Host

Port

Options  Use Secure Sockets Layer (SSL)  Use Default Credentials

User Name





Password

#### Test Email Message

To Email

Subject

Message

 Save  Reload  Send Test Email  Close

## Chapter 2 – Send Single Email

You can use the **Send Single Email** tool to send a test message to a customer or to resend a single ebill to a customer. This tool does not create bill forms in PDF format but you can use this tool to send an existing PDF bill to any email address.

Complete the Email Setup information as described in the previous chapter and then click the **Send Single Email** button on the main GAS MANager EBilling window.

The screenshot shows a dialog box titled "Send Single Email" with the following fields and content:

- Account:** 74202
- Name:** Alex Tagliani
- Email:** bromley.cdc@gmail.com
- Attach Bill(s):** 74202.PDF (with a "Browse" button)
- Email Message:**
  - Subject:** Your EBill from Town & Country Gas Co-op is attached.
  - Attachment(s):** (with a "Browse" button)
  - Message:** Please find attached, your bill for the period ending October 31, 2013. Your ebill has been provided as a PDF file. In order to open this file, you will need to have a PDF reader installed on your computer. If you don't already have a PDF reader installed on your computer, a free PDF Reader can be downloaded from any of the software vendors that are found by clicking on the following link.

At the bottom of the dialog, there are two buttons: "Send Email" (with an envelope icon) and "Close" (with an 'X' icon).

There are 2 ways of specifying the recipient's email address:

1. Simply type the recipient's email address in the Email field.
2. If you know the account number of the customer who is to receive this email, you may enter the account number and press the **Enter**. Doing this will cause the program to retrieve the customer's email address from the database.

If you wish to resend an existing ebill, you should use the **Browse** button next to the **Attach Bill** field to locate and select the appropriate ebill. If you do not wish to resend an existing ebill, this field may be left blank.

Type the **Subject** of the message and press **Enter**.

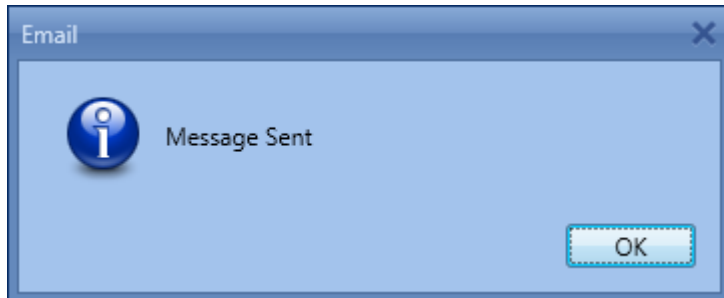
If you wish to include any additional attachments to this message, you should use the **Browse** button next to the **Attachment** field to locate and select the appropriate files to attach to the message. If you do not wish to include any additional attachments, this field may be left blank.



Type the **Message** that is to appear in the message body and press **Enter**..

Click the **Send Email** button to send the message.

When the message has been sent, a confirmation message like the following example will be displayed.



Click the **OK** button to acknowledge the message and return to the Send Single Email window.

Build a new email for sending by repeating the above procedures or click the **Return** button to go back to the main GAS MANager EBilling window.

## Chapter 3 – Perform EBilling

The **Perform EBilling** process is intended to be carried out after the completion of the BillRun process. GAS MANager EBilling prepares EBills in PDF format in much the same way that the GAS MANager BillRun program prepares printed bill forms. After the EBill PDF files have been created, they are emailed to the email address that is specified on the customer account in the main GAS MANager program.

Town & Country Gas Co-op Ltd. GAS MANager EBilling

### GAS MANager EBilling

**GAS MANager Bill** **NOTE: Logo file Coop.jpg is required for EBilling**

Select Billing: 201409001

Bill Format:

- Standard Bill Format
- Show Graph
- Combined Multiplier (non-Gas users)
- DO NOT create Bill. Send message only.

Save PDFs to: D:\EBills\ Browse

**Email Message** Maximum Attachments per Email: 100

Subject: Your gas bill from Town & Country Gas Co-op

Attachment(s): Browse

Message: Please find enclosed your gas bill for the period ended September 30, 2014.

Perform EBilling Preview Bills Single Email Email CDC Arrears Settings User's Guide Exit

Complete the data fields described below.

### Select Billing

- Choose from the drop-down list, the combination of month and cycle for which EBills are to be prepared.

### Bill Format

- EBills can be formatted using the same format as your paper bill forms.
- Choose the format that is appropriate for the billing cycle being processed.
- If you are sending your ebill accounts an informative message only (no EBill attached), choose "DO NOT create Bill Attachment. Send message only."

### Save PDFs to

- Type the path to, or browse to, the folder where the PDF copies of the customer bill are to be created.
- By default, the location is a folder called "EBill" folder in the user's Documents folder but you are free to create your PDF files in any folder that you choose. For example, you may wish to use a different folder for each month or billing cycle.

**Maximum Attachments per Email**

- Use this option to specify the maximum number of attachments permitted on an email message. The default value is 100.
- If there are a sufficient number of bills that the selected maximum is exceeded, additional email messages will be created.
- The number of attachments includes any attachments (newsletters etc.) that you may have included in addition to ebills.
- This setting can be used to prevent send errors that result from having too many attachments or an email message becoming too large due to the size and/or number of the attachments.

**Subject**

- The text entered here will appear as the subject of every email message created by the Perform EBilling process.
- This text will appear in the email recipient's inbox.

**Attachment**

- This field is optional.
- Use this field to attach additional files to the EBill message. These additional attachments are the electronic equivalent of any additional paper documents that would be inserted into the customer's paper bill.
- Additional attachments should not be stored in the same folder as the EBills because the program delete files all files from the Save PDFs To folder prior to processing. Any additional attachments should be stored in a different folder in order to avoid deletion.

**Message**

- The text that you enter here will be placed in the email message body.
- A sample message has been provided below:

Please find attached, your bill for the period ending October 31, 2013.

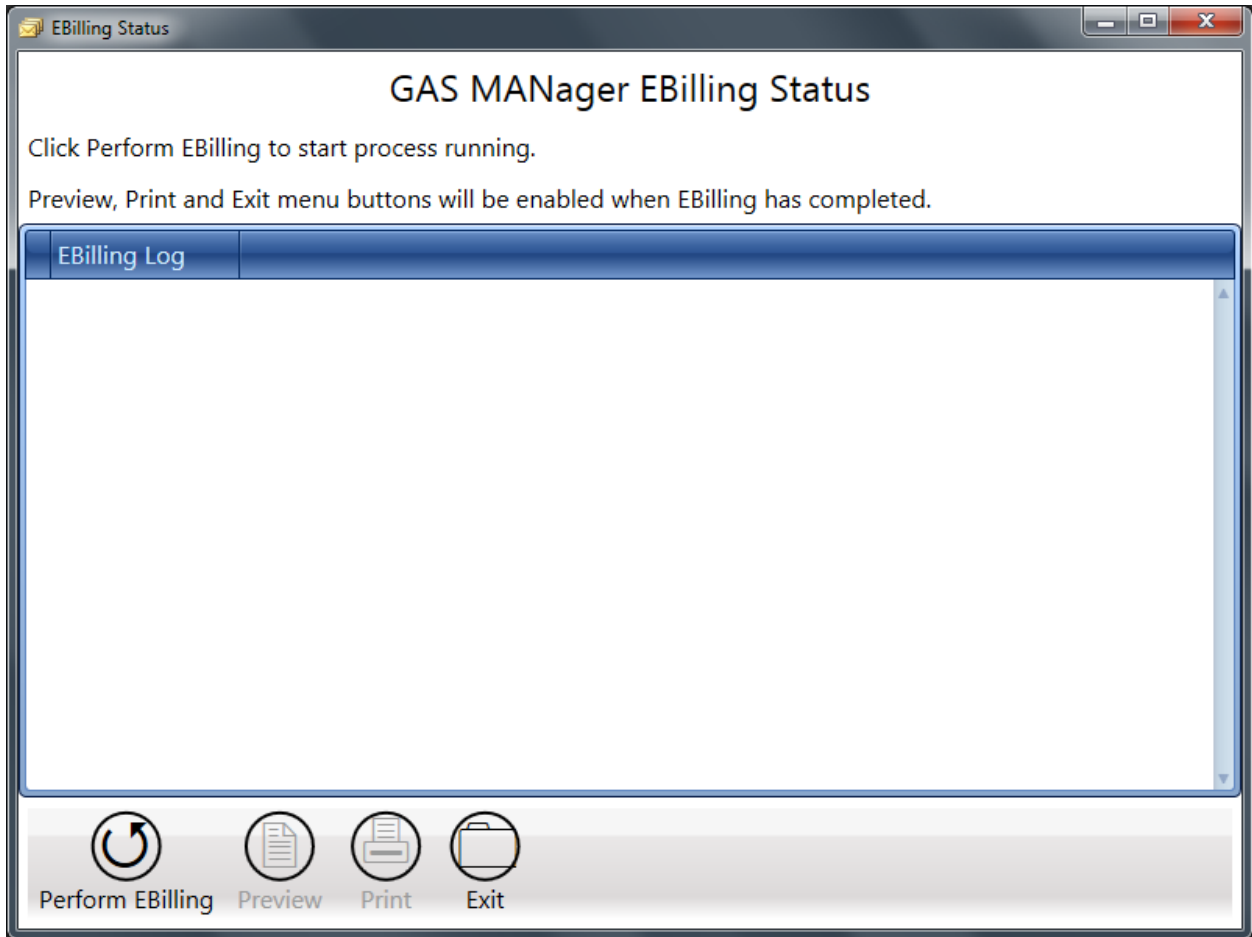
Your ebill has been provided as a PDF file. In order to open this file, you will need to have a PDF reader installed on your computer. If you don't already have a PDF reader installed on your computer, a free PDF Reader can be downloaded from any of the software vendors that are found by clicking on the following link:

[https://www.google.ca/search?sourceid=navclient&aq=2h&oq=Free+PDF+&ie=UTF-8&rlz=1T4GGLJ\\_enCA290CA291&q=free+pdf+reader](https://www.google.ca/search?sourceid=navclient&aq=2h&oq=Free+PDF+&ie=UTF-8&rlz=1T4GGLJ_enCA290CA291&q=free+pdf+reader)

Town & Country Gas Co-op Ltd.  
Box 460  
Stettler, AB, T0C 2L0

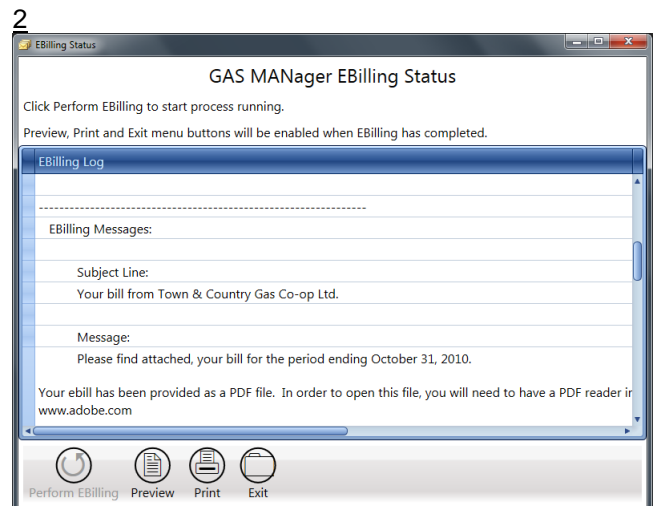
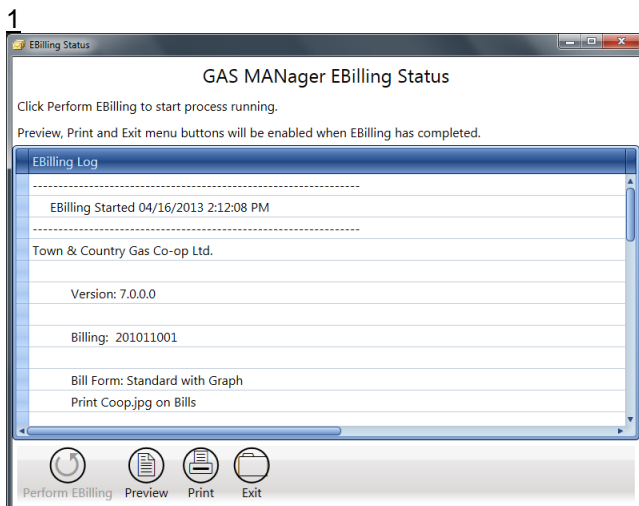
403-742-2144

When the above data fields have been completed to your satisfaction, click the **Perform EBilling** button to open the **GAS MANager EBilling Status** window.

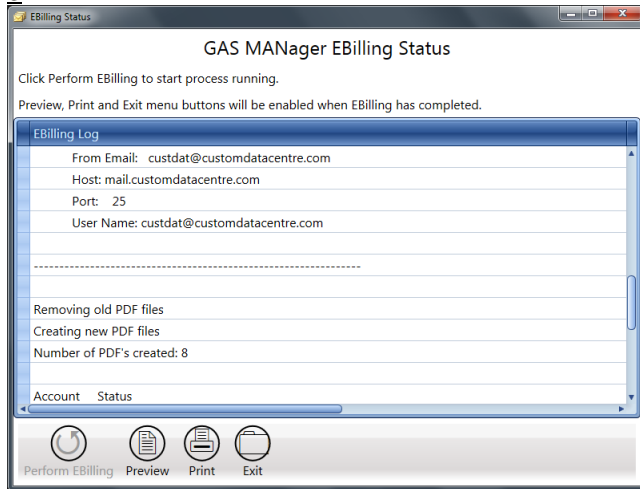


When the above data fields have been completed to your satisfaction, click the **Perform EBilling** button to start the ebilling process.

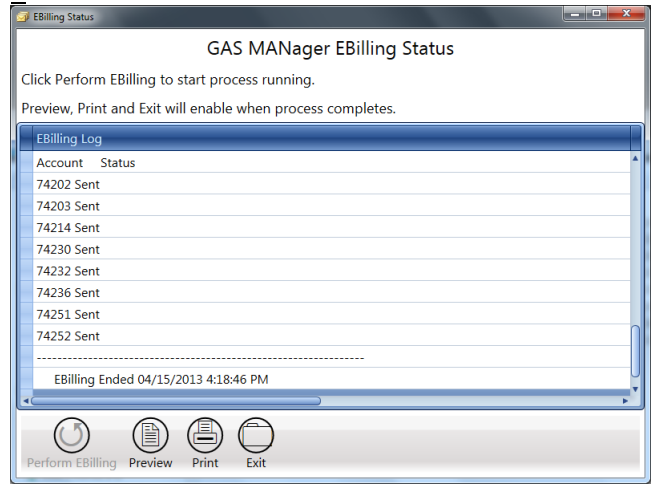
Below you can see the results of a successful EBilling. These results are stored in a log file which can found in a folder called **Log** which will be created as a sub-folder of the folder where the PDF files are created. The log file should always be examined for error messages. For example, if the program was unable to send an email to an account, an error message will be recorded in the log file.



3



4



Log files are simple text files that can be opened using Windows Notepad. A new log file is created for each date on which the Perform EBilling process is initiated. If the Perform EBilling process is executed more than once on the same date, the log file will have the process results for each execution appended to the log. If you prefer to keep printed copies of the EBilling logs, click the **Print** button that has been provided.

The PDF files created by GAS MANager EBilling will remain available for viewing, printing, and emailing until the next time that the Perform EBilling button is clicked. Clicking the Perform EBilling button causes any existing PDF files to be deleted from the EBill folder. If an ebill must be Emailed again, the Send Single Email feature can be used resend the most recent bill. In the event that a PDF from a previous bill cycle must be emailed again, a new PDF can be prepared using the bill print facility provided by the main GAS MANager program. This new PDF can be emailed using your regular emailing method, or the PDF file can be saved to the EBill folder, using a unique file name, where it can be sent using the Send Single Email facility.

## Chapter 4 – Preview Bills

The **Preview EBills** tool is nearly identical to the Reprint Bills feature that is provided in the main GAS MANager program. The most significant difference between these 2 methods of viewing customer bills is that the Preview EBills tool does not provide a facility for sorting the bills. The bills are presented in the same order that they will be emailed and that is in order of account number. This is by design because there is no advantage to sorting bills which will be delivered by email.

Town & Country Gas Co-op Ltd. GAS MANager EBilling

### GAS MANager EBilling

**GAS MANager Bill** **NOTE: Logo file Coop.jpg is required for EBilling**

Select Billing: 201409001

Bill Format:

- Standard Bill Format
- Show Graph
- Combined Multiplier (non-Gas users)
- DO NOT create Bill. Send message only.

Save PDFs to: D:\EBill\ Browse

**Email Message**

Subject: Your gas bill from Town & Country Gas Co-op

Attachment(s): Browse

Message: Please find attached your gas bill for the period ended September 30, 2014.

Perform EBilling Preview Bills Single Email Email CDC Arrears Settings User's Guide Exit

You may click the **Preview EBills** button after first selecting the Billing (month & cycle) that is to be previewed. You should also select the desired **Bill Format** and whether or not the **Meter Reading & Payment Card** should include a place for the customer to write their new meter reading. For EBills, you will want to select the **Print Coop.jpg on Bills** option. If you intend to print these bills, you should select this option only if your bill forms do not have your co-op logo pre-printed in the top-left corner of the form.

The previewed ebills will appear in the same preview window as all other GAS MANager reports and the same options are available for performing additional tasks, such as printing or exporting.

Closing the preview window will return the user to the above program window.

## Chapter 5 –Send CDC Email

The purpose of this feature is to allow the user to send an EBilling log to Custom Data Centre for troubleshooting purposes.

Town & Country Gas Co-op Ltd. GAS MANager EBilling

### GAS MANager EBilling

**GAS MANager Bill** **NOTE: Logo file Coop.jpg is required for EBilling**

Select Billing: 201409001

Bill Format:

- Standard Bill Format
- Show Graph
- Combined Multiplier (non-Gas users)
- DO NOT create Bill. Send message only.

Save PDFs to: D:\EBill\ Browse

**Email Message**

Subject: Your gas bill from Town & Country Gas Co-op

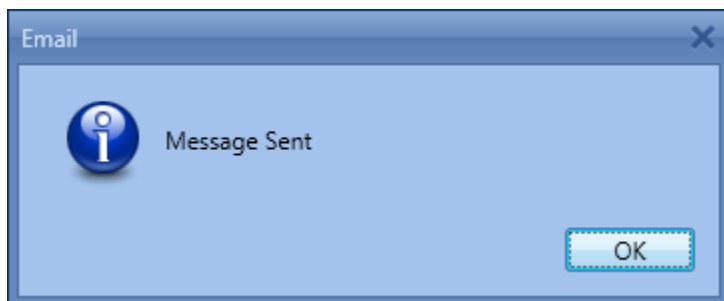
Attachment(s): Browse

Message: Please find attached your gas bill for the period ended September 30, 2014.

Perform EBilling | Preview Bills | Single Email | Email CDC | Arrears | Settings | User's Guide | Exit

In order to use this program feature, you must provide values for the **Subject Line**, **Attachment**, and **Message** fields. You must attach an ebilling log file in order to use this program feature. The other data fields on this window may also contain values but they will be ignored by the Send CDC Email feature.

When the above data fields have been completed to your satisfaction, click the **Send CDC Email** button.



A message like the example shown above will be displayed when your email message has been sent.

## Chapter 6 – Arrears Notices

Town & Country Gas Co-op Ltd. GAS MANager EBilling

### GAS MANager EBilling

**GAS MANager Bill** NOTE: Logo file Coop.jpg is required for EBilling

Select Billing: 201409001

Bill Format:

- Standard Bill Format
- Show Graph
- Combined Multiplier (non-Gas users)
- DO NOT create Bill. Send message only.

Save PDFs to: D:\EBill\ Browse

### Email Message

Subject: Your gas bill from Town & Country Gas Co-op

Attachment(s): Browse

Message: Please find attached your gas bill for the period ended September 30, 2014.

Perform EBilling | Preview Bills | Single Email | Email CDC | Arrears | Settings | User's Guide | Exit

Click the **Arrears** button to access this program feature.



Town & Country Gas Co-op Ltd. Arrears Notices

## GAS MANager Arrears Notices

**GAS MANager Arrears Notices** **NOTE: Logo file Coop.jpg is required.**

As Of

Age

Message

Save PDFs to

**Email Message**

Subject

Attachment(s)

Message

Complete the data fields described below.

**As of**

- Choose from the calendar the date on which the arrears notices are to be prepared.

**Age**

- Choose the aging period that is to be used to prepare the arrears notices.

**Message**

- As with printed arrears notices, you can provide a message that will appear on every arrears notice that is prepared.

**Save PDFs to**

- Type the path to, or browse to, the folder where the PDF copies of the arrears notices are to be created.
- By default, the location is a folder called “Notices” folder in the user’s Documents folder but you are free to create your PDF files in any folder that you choose. For example, you may wish to use a different folder for each month.

**Subject**

- The text entered here will appear as the subject of every email message created by the Email Notices process.
- This text will appear in the email recipient’s inbox.

**Attachment**

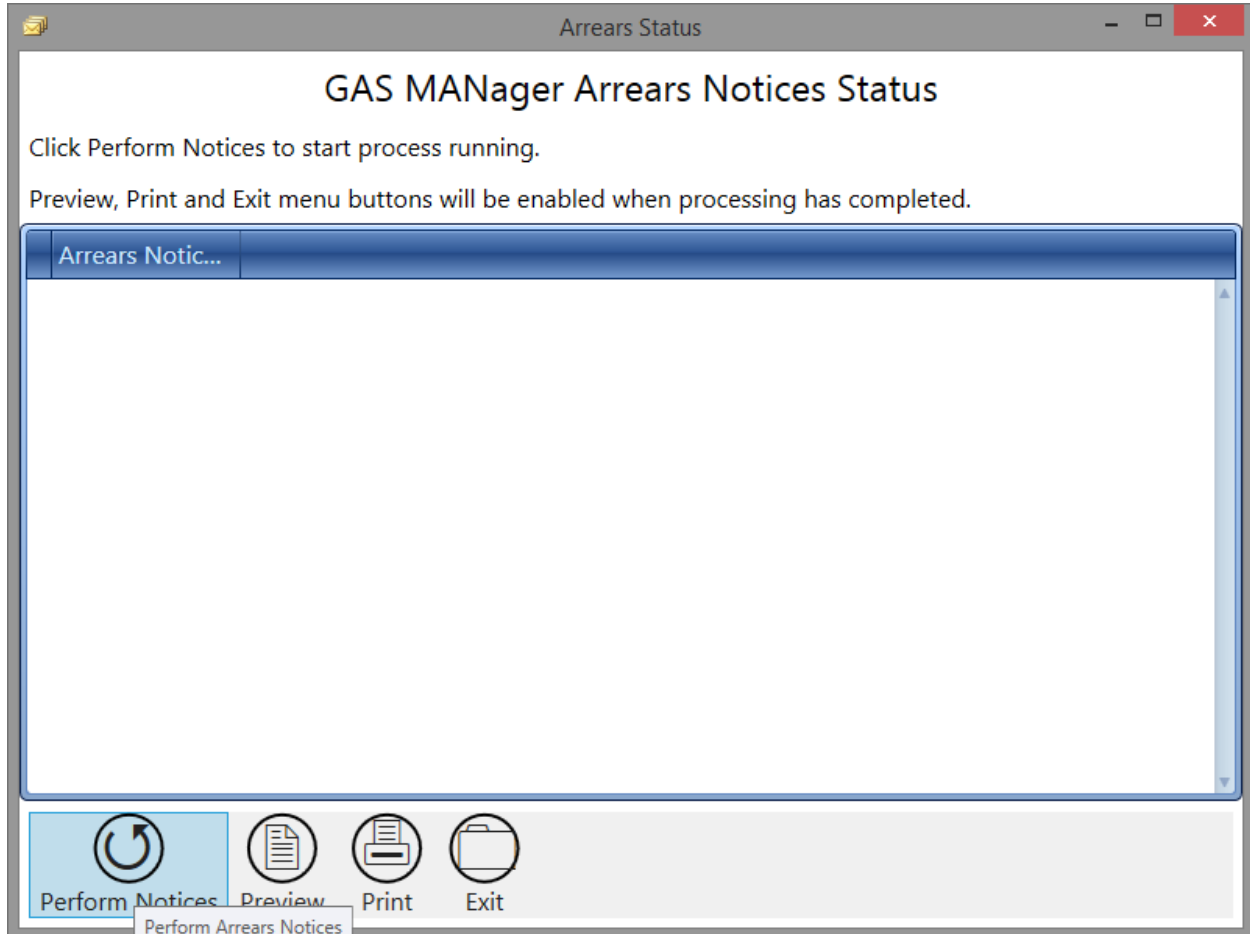
- This field is optional.
- Use this field to attach an additional files to the email message. These additional attachments are the electronic equivalent of any additional paper documents that would be inserted into the customer’s arrears notice.

### Message

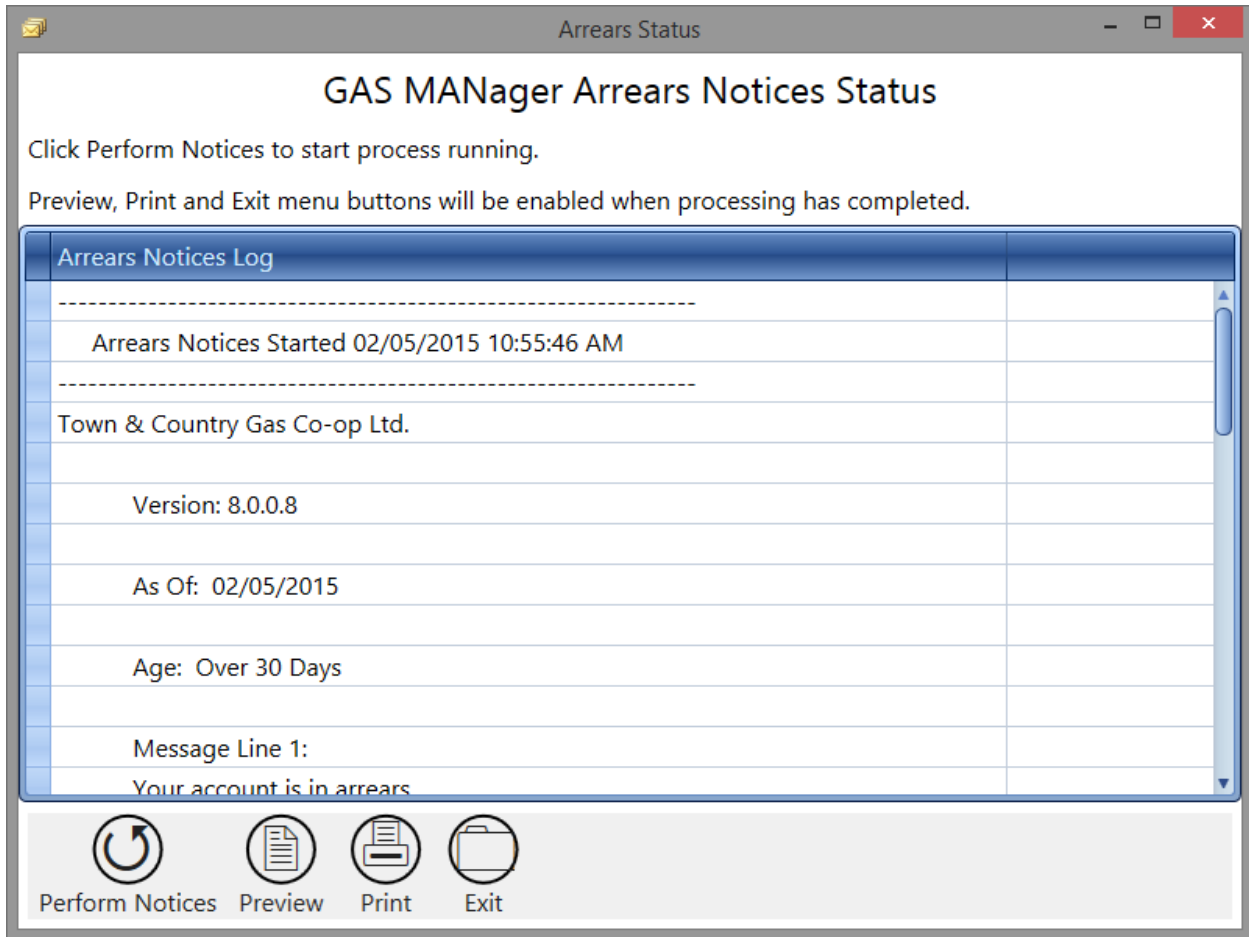
- The text that you enter here will be placed in the message body of every email message created by the Email Notices process.

When the above data fields have been completed to your satisfaction you may preview the arrears notices before they are emailed by clicking the **Preview Notices** button. Like all other report previews, the arrears notices may also be printed or exported to another file format.

When you have previewed the arrears notices and are confident that they are correct, click the **Email Notices** button.

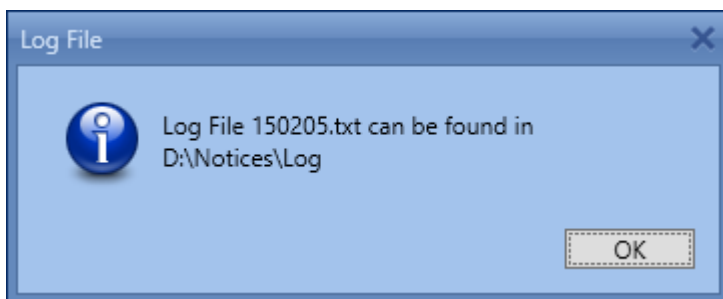


Click the **Perform Notices** button to proceed with the emailing of the arrears notices that have been prepared.



The Arrears Notices Log can be printed and saved for future reference or it can be previewed and then exported in a file format that suits your filing needs. A text version of the Arrears Notices Log is saved automatically.

Click the **Exit** button to close the program. As the program is closed, a message box advising of the location of the text version of the Arrears Notices Log will be displayed.



## Chapter 7 - Software Support

If you are having difficulty when trying to send messages from an email address in the **ccewireless.ca** domain, please contact their technical support team regarding registration of your IP address before requesting assistance from Custom Data Centre.

For software support, contact Custom Data Centre at:

Phone: (403) 742-2144

Fax: (855) 742-8416

E-Mail: [custdat@customdatacentre.com](mailto:custdat@customdatacentre.com)

The following page is an example of the information that should be provided to us in the event that a program error occurs. This page should be completed and faxed to our office at the above fax number. Be sure to include a cover page listing your Co-op's name, phone number, and the name of a contact person. You may also email this information to the above email address.

If you are reporting a program error, every effort will be made to provide a corrected version of the program as soon as possible.

All requests for urgent program modifications will be reviewed by Custom Data Centre. Requests for non-urgent program modifications should be presented for discussion at the GAS MANager User Group Meeting. Implementation of these modifications will be at the discretion of Custom Data Centre.

Before requesting support, please ensure that you are running the most recent version of GAS MANager EBilling. You can ensure that your software is always up to date by taking advantage of the automatic update feature that has been built into GAS MANager. (See the GAS MANager User's Guide for more information about using this feature.) The most recent program and report updates can also be obtained from our website at [www.customdatacentre.com](http://www.customdatacentre.com).

## **GAS MANager EBill Software Support Request Form**

**Write down the error message:**

---

---

---

---

**What action(s) were you performing before the error occurred:**

---

---

---

---

**What actions did you take after the error occurred:**

---

---

---

---

**Can you reproduce the error?** \_\_\_\_\_

**Has the configuration of your computer or network changed recently?  
For example, has any new hardware or software been installed?**

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Fax this form to: (855) 742-8416  
Please include a cover page with your Co-op's name, phone number and contact person.

You may also email the above information to [custdat@customdatacentre.com](mailto:custdat@customdatacentre.com).