i-Vu® System v6.0
Tenant Override Billing

TLO
Timed Local Override

⚠ Verify that you have the most current version of this document from **www.hvacpartners.com** or your local Carrier office.

Important changes are listed in **Document revision history** at the end of this document.

Contents

What is Tenant Override Billing?

Prerequisites

- The i-Vu® Plus v6.0 or i-Vu® Pro v6.0 application installed

- Tenant Override Billing file (override.addon)

- Adobe Acrobat Reader and, for the i-Vu® Pro application, Microsoft Excel

- The Tenant Override Billing operator must have the Installer or Administrator role

- Controllers have been successfully uploaded to your i-Vu® system and live data is displaying on the graphics

Tenant Override Billing allows you to bill tenants for the time that they override the i-Vu® system, changing their area from unoccupied to occupied. An occupant triggers an override in their area by pressing the pushbutton on a sensor during the unoccupied mode.

You can schedule Tenant Override Billing to automatically produce monthly invoices for all tenants, or you can produce manual invoices for selected tenants on an as-needed basis. You can either email or print the invoices.

When you schedule invoices to run automatically, only a .pdf invoice is generated. The invoices are then automatically emailed to the specified tenants.

Each time Tenant Override Billing produces invoices, it creates the following:

The i-Vu® Plus application

- A file named report.pdf that contains all the invoices produced at that time and can be used to print the invoices. This file:

    ○ is overwritten each time invoices are produced

    ○ automatically opens when you run manual invoices

- An email invoice (if this feature is set up for your company and the tenant)

The i-Vu® Pro application

- All of the above, plus an Excel spreadsheet for each tenant's invoice. The files are automatically saved in i-Vu_Pro_x.x\webroot\<system_name>\webapp_public\override\reports\<tenant>. The file names contain the invoice date and time, for easy retrieval.

- A file named report.pdf that contains all the invoices produced at that time and can be used to print the invoices. This file is:

    - saved in i-Vu_Pro_x.x\webroot\<system_name>\webapp_public\override\reports
    - overwritten each time invoices are produced
    - automatically opens when you run manual invoices

- An email invoice (if this feature is set up for your company and the tenant)

Installing Tenant Override Billing

You must have the i-Vu® Plus or Pro v6 application to use this version of Tenant Override Billing. If you were using an older version of Tenant Override Billing and upgraded to the i-Vu® v6.0 application, you will have to start from the beginning and set up all your information as explained in this document.

1 Download the appropriate **Tenant Override Billing** file from *Carrier Control Systems Support Site http://www.hvacpartners.com/*, and save it to your desktop.

NOTE You can delete this file from your desktop after you complete this procedure.

2 Log in to your i-Vu® system.

- The i-Vu® Plus application - From the **Main Menu** ▼ drop-down list, select **System Options** > **Add-ons** tab.

- The i-Vu® Pro application - From the **Main Menu** ▼ drop-down list, select **System Options** > **System Settings** > **Add-ons** tab.

3 Browse to the override.addon file on your desktop.

4 Click **Install Add-on**.

NOTE The row that begins with **override** should show a status of **running**.

5 In a web browser, type the address of your i-Vu® system followed by `/override`. For example, http://ivu/override.

NOTES

- `/override` is case sensitive.

- If i-Vu® server uses SSL for secure communication, Tenant Override Billing can also use SSL. Begin the above address with `https://`.

6 If you logged out of i-Vu®, you must log in to Tenant Override Billing with your i-Vu® user **Name** and **Password**.

NOTE If Tenant Override Billing detects no activity for 30 minutes, it will log you out.

Required control program logic

You can use Snap v6.0 to make a custom control program to bill a tenant for overrides.

1   Use the Digital Trend Log microblock for a billable zone.

   NOTE The **Reference Name** must be **timeoverride**

2   Enable the following in the microblock's properties:

   ○   **Enable Trend Log**

   ○   **Sample on COV**

   ○   **Enable Trend Historian**
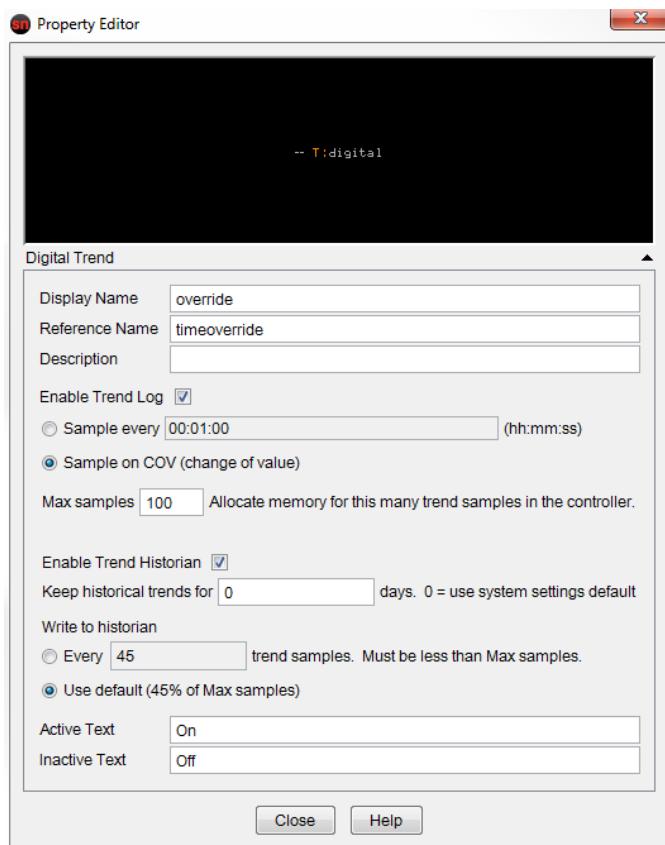
3   The logic must filter out any override when the zone is occupied.

Setting up and using Tenant Override Billing

To set up your company's information

1   On the **Configuration** Screen, enter your company's information. See table below.

   NOTE   Do not use the following characters: & % + < >

2   Click **Accept**.

| Field	Notes	See Sample Invoice (page 9)
Logo	Optional—To have a logo appear at the top of the invoices, browse to the logo file. Supported formats: gif, jpeg, png If you do not select a logo, the name of your system will appear on the invoices.	①
From	Your company's name as you want it to appear on the invoice.	②
Address	Your company's address as you want it to appear on the invoice.	③
Currency symbol	The symbol that you want to appear before the invoiced amount.	④
Date format	The format (dd Mon, yyyy -or- Mon dd, yyyy) that the user interface and invoice will use for dates.	⑤
Billing contact	Contact information that you want to appear on the invoice in the sentence, **Contact _____ for questions about this bill**.	⑥
Next invoice no.	Tenant Override Billing numbers the invoices sequentially, starting with this number. Type numbers only; no spaces or special characters.	⑦
Update invoice no.	If you have run manual invoices in the current session of Tenant Override Billing, click the button to have the **Next invoice no.** field show the next available invoice number.	

NOTES

i-Vu® Pro application only:

- To add a note that will appear on every invoice, you must edit a file named **invoicefields.properties**:

   a)   Create an **invoicefields.properties** file in the following folder:

   i-Vu_Pro_6.0\webroot\<system_name>\webapp_data\override\private

See below for example.

b) Type "notes=" followed by the message (see below) and then save the file.
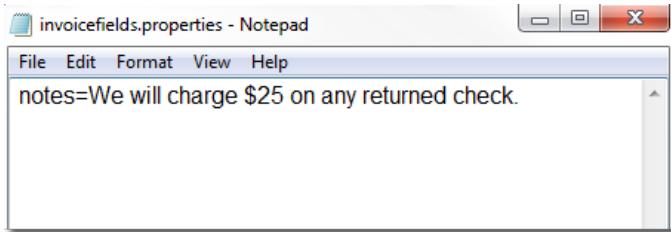
The example above results in ⑧ on Sample Invoice (page 10).

- To add a prefix to the invoice number, add it to the **invoicefields.properties** file using the instructions above.
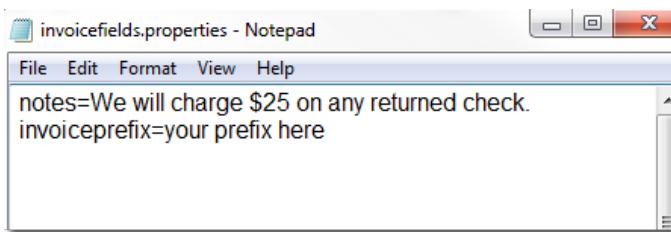
The example above results in ⑦ on Sample Invoice (page 10).

To set up email invoices

If you want to email invoices:

1   On the **Configuration Screen**, click **Email settings**.

2   Enter the appropriate information. See table below.

NOTE   Do not use the following characters: & % + < >

3   Click **Accept**.

Field	Notes
SMTP (Email) Server	The SMTP mailserver's address. This can be an IP address or a system name, such as mail.mycompany.com.
User name and **Password**	The user name and password required to access the local network's SMTP email server.
Your email	Your company representative's email address.
CC reports to	Enter an email address of anyone (such as your accountant) that you want to receive the .pdf file containing all invoices.

Field	Notes
Subject	Subject line of the email.
Message	Email message.
Enable SSL for Email Port ___	Select this checkbox if your mailserver uses SSL to secure communications. Your Network Administrator can give you this information, plus the mailserver's port number.

NOTE You must also enter an email address for each tenant whose invoice you want to email. See "To set up tenant information" below.

To set up tenant information

1 Log in to Tenant Override Billing.

2 In the upper left corner of Tenant Override Billing, click **Add**.

3 Type the tenant's name and address in the first 5 fields.

i-Vu® Pro application only:

Each invoice is saved as a .pdf file and an Excel spreadsheet using the tenant name as part of the file name. If you type a \ / : * ? " | in the Tenant field, the character will be replaced by an underscore (_) in the file name.

4 Enter information in the following fields.
NOTE Do not use the following characters: & % + < >

Field	Notes	See Sample Invoice (page 9)
Billing Rate	The amount to be billed per hour or minute.	⑨
Allowance	The amount you want to discount the tenant's bill.	⑩
Service Charge	Optional—A flat fee that you can bill the tenant for the override service. Charges for actual override time are added to this fee.	⑪
Minimum billed time per override	Optional—The minimum time you will bill the tenant each time they override the system.	⑫
Minimum increment time	Optional—Time increment for which the tenant is billed. For example, if the increment is 10 minutes, and the tenant overrides the system for 45 minutes, they will be billed for 50 minutes.	⑬
Email address	Select the **Email bill to tenant** field to email the invoice, then type the tenant's **Email Address**. See *To set up email invoices* (page 5).	

5   Select the **Zones** tab.

6   In the tree, select the equipment that affects that tenant's area.

   NOTE If the tenant has multiple areas, select multiple items in the tree or click **Select all**.

7   Click .

   NOTE Tenant Override Billing retrieves the latest i-Vu® tree each time you log in. If you add a zone to your system while logged in to Tenant Override Billing, log out and log back in to see the new zone. The new zone's control program must have the required control program logic.

8   To set up specific times in a week for which you do not want to bill the tenant, select the **Exemptions** tab. Otherwise, click **Accept**.

9   Type a **Name** for the exemption.

10 Select the **Day(s) of the week** and define the **Times** for which you do not want to bill the tenant.

11 Click **Save to list**.

12 Repeat steps 8 through 10 to define multiple exemption periods.

13 Click **Accept**.

To automatically produce monthly invoices for all tenants

1   On the **Configuration Screen**, click the **Invoice scheduler** button [Invoice scheduler] .
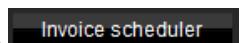
2   In the **Add billing date** field, click in the **Add billing date:** field to access the calendar, then select the first billing date that you will want to produce invoices.

3   Click **Add**.

4   Repeat steps 2 and 3 for each consecutive month that you want to produce invoices.

5   In the **Billing period** field, select the period of time that you want the invoice to cover.

6   In the **Scheduled due date** field, define when the payment is due.

7   Click **Accept**.

The **Next scheduled run** field shows the next date invoices will be produced. This occurs at 12:00 a.m. on that date. i-Vu® server must be running, but Tenant Override Billing does not have to be running.

NOTE If i-Vu® server stops running and scheduled invoices cannot be produced, they will be produced the next time i-Vu® server is started.

To run manual invoices

1   Under **Billing Period** on the **Configuration Screen**, select **Previous calendar month** or define a specific **Start** and **End** date that you want to invoice the tenant for.

2   In the **Due date** field, click in the **Add billing date:** field to access the calendar, and then select the date.

3   In the **Tenant List**, select individual tenants whose invoices you want to produce or choose **Select All**.

4   Click **Run selected invoices**.

Appendix: Sample invoice

① **ABC**ompany

INVOICE   OVERRIDE ENERGY USE

From: ② ABC Company

③ 123 Main Street, Ste. 100

Centerville

GA 39999

To: Prestige Corp.

123 Main St., Ste 590

Centerville, GA 39999

Invoice No.: ⑦ Your prefix here 000007

Invoice Date: ⑤ June 01, 2011

Period: May 01, 2011 - May 31, 2011

Amount Due: ④ $231.25

Due Date: Jun 30, 2011

Questions: ⑥ Contact Customer Service for questions about this bill.

Notes: ⑧ We will charge $25 on any returned check.

	Date	Begin	Date	End	Minutes	Amount
/First floor/Suite 590/vav3						
1.	May 16, 2011	10:12:30 AM	May 16, 2011	11:15:04 AM	75	31.25
2.	May 16, 2011	04:07:25 PM	May 16, 2011	06:07:25 PM	120	50.00
3.	May 17, 2011	10:19:07 AM	May 17, 2011	12:19:07 PM	120	50.00
4.	May 17, 2011	03:20:09 PM	May 17, 2011	07:18:19 PM	240	100.00
				/First floor/Suite 590/vav3		$231.25

Total Due		$231.25
⑩ Less allowance		- $5.00
⑪ Service charge		$5.00
GRAND TOTAL		**$231.25**
⑨ Rate :	$25.00 per hour.	
⑬ Minimum increment time:	15 min.	
⑫ Minimum billing time:	60 min.	

Prestige Corp.

Document revision history

Important changes to this document are listed below. Minor changes such as typographical or formatting errors are not listed.

Date	Topic	Change description	Code*
6/16/14	To set up your company's information	The i-Vu® Pro application only - instructions for setting up a note to print on an invoice.	C-D_LJ

* For internal use only