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i-Vu Open 5.0

Tenant Override Billing



TLO

Timed Local Override



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What is Tenant Override Billing?

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.

Overrides are triggered when an occupant in the area presses the pushbutton on a sensor in their zone 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 email the invoices or print them.

When creating invoices manually, the user has the option to view invoices using Excel (.xls format), or Adobe Reader (.pdf format). Once the invoice is displayed, the user can choose to save it for future reference.

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

System Requirements

- i-Vu Open Plus (i-Vu)
- Tenant Billing Add-On for i-Vu (override.war)
- Microsoft Internet Explorer
- Microsoft Excel and/or Adobe Acrobat Reader


Prerequisites

- i-Vu has been successfully installed on the jobsite
- The Tenant Billing operator must have the **Installer** or **Administrator** role in i-Vu
NOTE Tenant Billing operator MUST have a valid password assigned (the password cannot be blank).
- All controllers have been successfully uploaded to the i-Vu system and live data is being viewed on all equipment graphics

To install and start Tenant Override Billing

- 1 Download the **Tenant Billing** web application (override.war) from the *Carrier Controls Support site* <http://www.hvacpartners.com>.
- 2 Save this file to your PC.
- 3 Log into i-Vu with your Tenant Billing user **Name** and **Password**.

What is Tenant Override Billing?

- 4 Click the **Main Menu** button , select **System Options > Web Applications** tab.
- 5 Browse to the location where you downloaded the override.war file.
- 6 After choosing the file, click **Open**.
- 7 Click **Add Web Application** to install Tenant Billing. After about 25 seconds, you should receive the message **Web Application has been successfully deployed**.
- 8 Click **OK**. The “/override” Webapp Path should now show a status of **running** in the **Web Applications** list.
- 9 Click **Close**.

To start Tenant Override Billing

- 1 In Internet Explorer, navigate to `http://<system_name>/override`, or navigate to `http://<system_IP_address>/override`.
- 2 Login with your i-Vu user **Name** and **Password**.

To set up your company's information

- 1 Click **Configure** button > **Owner Information** tab.
- 2 Enter your company's information in the appropriate fields. See table below.
- 3 Click **Save** or **Cancel**.

Field	Notes
Name and Address	Your company's name and address, as you want it to appear on the invoice.
Billing Contact	Contact information that you want to appear on the invoice in the sentence, Contact _____ for questions about this bill.
Currency	The symbol that you want to appear before the invoiced amount.
Logo	<p>To have a logo appear at the top of the invoices, browse to the logo file. Supported formats: jpeg, pjpeg, gif, png, xpng.</p> <p>The vertical dimensions of the logo will control the vertical placement of the tenant and the return addresses.</p> <p>NOTE Logo file size must be less than 1 Mbyte or you will receive the error Please choose a smaller file.</p>

To set up email invoices

If you want to email invoices:

- 1 Click **Configure** button > **Email Setting** tab.
- 2 Enter information in the following fields:

Field	Notes
SMTP/S Server	<p>The SMTP mailserver's address.</p> <p>TIP This can be either an IP address or a system name, such as mail.mycompany.com. If your mail server does not have a name, then use its IP address instead. This information should be obtained from your network administrator.</p>
SMTP/S Port	The SMTP mailserver's port.
Local Host Name	Internet name of i-Vu web server, i.e. "ivu.carrier.com". This setting is not normally needed, if the server name is configured properly.
Mail user and Password	If required, the User Name and Password to access the mailserver.
From	Your company's email address. This will be shown as the Reply to email address on the invoice.

To set up your company's information


Field	Notes
CC reports to	Enter an email address of anyone (such as your accountant) that you want to receive the .pdf file containing all invoices.
Subject	Subject line of the email.
Message	Email message.
Test Address	If you would like to email a test invoice, enter the destination email address and click Send Test Email button.

- 3 Click **Save**.

NOTE You must also enter an email address for each tenant whose invoice you want to email. See *To set up tenant information* (page 5).

Invoices

To automatically produce monthly invoices for all tenants

- 1 Under **Report List**, click **Select All** or just the tenant(s) you wish to bill.
- 2 Click **Reports** button on the top menu bar > **Invoice Scheduler** tab.
- 3 Under **Monthly billing cycle**, select the period of time that you want the invoice to cover. Select:
 - o **Start of the month** to invoice for the calendar month
 - o **Day ___ of every month** to invoice for the month beginning with the day you select in the drop-down list
- 4 In the **Scheduled due date** field, define when the payment is due.
- 5 In the **Select a date** field, click , then select the first billing date that you will want to produce invoices.
- 6 Click **Add**.
- 7 Repeat steps **5** and **6** until all billing dates are added.

NOTE Remove a billing date at any time by clicking the billing date and hitting the **Remove** button.
- 8 Click **Save**.

To run and view manual invoices

- 1 Under **Report List**, click **Select All** or just the tenant(s) you wish to bill.
- 2 After setting up *Invoice Scheduler* (page 4), click the **Run** tab.

NOTE The **Next scheduled run** field shows the next date invoices will be produced. This occurs at 12:00 a.m. on that date. This is the date you selected on the **Invoice Scheduler** tab.
- 3 Enter the starting invoice number in **Next Invoice No..** Tenant Override Billing numbers the invoices

sequentially, starting with this number. This field is updated each time you start Tenant Override Billing.

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

NOTE i-Vu only stores override events for up to 2 months. Therefore, the **Start** and **End** date span cannot be greater than two months (62 days). If the **Start** and **End** dates are longer than 2 months, the resulting invoice will still only bill for events that occurred within the last 2 months.

- 5 Click **Save** for the new parameters to be reflected in the next report.
- 6 Click **Email selected reports**.
- 7 If you wish to view an individual Tenant's override usage for the selected period, then select the tenant's name from the **Tenant List**. Then click **PDF** or **Excel** to view the tenant's invoice. The **Select All** option is not available, as only one tenant invoice can be viewed at a time.
- 8 If you wish to save the tenant's invoice after viewing it, then click **Save** and choose the location to save the invoice.
- 9 Close the window once you are done viewing and saving the invoice.
- 10 If you would like to e-mail invoices manually, then select the tenants that you would like to e-mail or click **Select All** to choose all tenants. Then click **Email selected reports**.

NOTES

- i-Vu must be running for invoices to be created and emailed, but Tenant Override Billing does not have to be running
- If i-Vu is powered down or stops running and the scheduled invoices cannot be produced, they will be produced the next time i-Vu is started.
- If an i-Vu Open Router that provides data for an invoice is offline when the invoice is produced, the invoice will state **No data available** for that zone or area.

Tenant List

Follow these directions to create and maintain your **Tenant List**.




To set up tenant information

- 1 Click **Configure** button > **Reports** tab.
- 2 Click **Add**.
- 3 Select the **General** tab, type the tenant's name and address in the first 6 fields.
- 4 Enter information in the following fields:

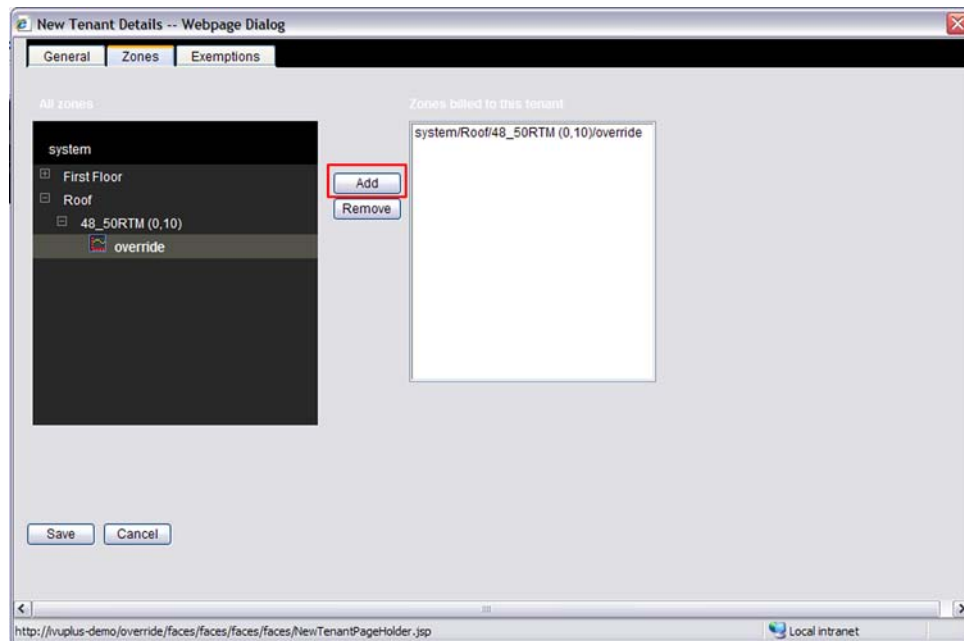
Field	Notes
Allowance	The amount of free override time, in dollars and cents, allowed for this tenant each month. Use the following format: 50.55.
Billing Rate	The dollar amount to be billed per hour or minute of override time. Use the following format: 10.55.

To set up your company's information

Field	Notes
Min. Event (min)	The minimum time (in minutes), that you will bill the tenant each time they override the system. For example, if the Min. Event (min) property is set to 20, then the tenant will be billed for 20 minutes even if his zone is actually only overridden for 10 minutes.
Increment (min)	(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.
Email tenant his/her bill	Select this field to email the invoice, then type the tenant's Email Address . See <i>To set up email invoices</i> (page 3).

- 5 Click **Save**.
- 6 Select the **Zones** tab.
- 7 Locate the tenant's area and/or equipment in the navigation tree. Click  to the left of the tenant's area and equipment until you see **Override** .
- 8 Click  to the left of **Override** to select it, then click **Add**. The tenant is now associated with this area and/or equipment and will be billed for override time that occurs in this area.

NOTE Click **Remove** to undo an association.



- 9 Repeat steps 7 and 8 for any additional areas.
- 10 Click **Save**.
- 11 To set up specific times that you do not want to bill the tenant, select the **Exemptions** tab.
- 12 Type a **Name** for the exemption.
- 13 Select the **Day(s) of the week** and define the **Time** you do not want to bill the tenant.
- 14 Click **Add**.

NOTE Edit or delete an exemption, at any time, by clicking the **Edit** or **Delete** button.

- 15 Repeat steps 11 through 14 to define multiple exemption periods.
- 16 Click **Save**.
- 17 Close the **Exemptions** window.

To edit or delete an existing tenant

To edit an existing tenant's information

- 1 Click the checkbox next to the tenant name in the **Report List**.
- 2 Click **Configure > Reports** tab.
- 3 Click **Edit**.
- 4 Make any necessary changes in the **General, Zones, or Exemptions** tabs, then click **Save** to save the changes.

To delete an existing tenant

- 1 Click the checkbox next to the tenant name in the **Report List**.
- 2 Click **Configure > Delete**.
- 3 Click **Accept** when **Are you sure?** message appears.

To exit Tenant Billing

Click **Logout** to close tenant billing.

Invoices will continue to be generated automatically as long as i-Vu is running.



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A member of the United Technologies Corporation family · Stock symbol UTX · Catalog No. 11-808-415-01 · 8/14/2009