

Masterlinx Enterprise Management System

Consumer Portal

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Chapter 1: Getting Set Up

Welcome to the Masterlinx[™] Enterprise Management System Consumer Portal, the one-stop shop for single-customer metering information. The Consumer Portal gives you direct access to the all the meter reading and consumption information that has been recorded since your AMR (automated meter reading) meter was first installed, as well as its billing history.

This chapter introduces the Consumer Portal, the computer system requirements to load and run the portal web site, and how you can register an online account to access the portal for the first time.

System Requirements

The Masterlinx™ Enterprise Management System requires the following minimum system options to perform properly:

- Intel[®] Core[™] i3 or equivalent computer processor, or greater.
- 2 gb of computer memory.
- 50 mb of available hard drive space.
- Microsoft[®] Windows 8[®] Professional operating system, or later.
- Microsoft[®] Internet Explorer[®] 10 or later web browser or equivalent.
- Adobe[®] Reader[®] XI, or later.
- 1024x768 video resolution, displaying 32-bit color quality.
- High-speed internet connectivity with at least 10mb/sec download speed.
- The Masterlinx Consumer Portal may not work properly on some mobile devices.

Consumer Registration

The first thing you will need to do is create an online registration within the Masterlinx Enterprise Management System. With a current utility bill at hand, open your web browser, enter www.Masterlinx.com into the address bar, and press Enter on your keyboard to go to the Masterlinx website:



Now click on the Consumer Registration link below the USER NAME field:

Full Name on Bill		Full name as it appears on the bill.
Account Number		Account number as it appears on the bill.
Email Address		Your Email will be your login ID.
Re-type Email Address		
Password		
Confirm Password		
	Register Cancel	To help ensure delivery of your registration email, please add "noreply@masterlinx.com" to your email address book or Safe Senders list.

- The Full Name on Bill, and Account Number all must match exactly what is printed on your utility billing statement; otherwise, the Masterlinx system will not allow you to complete the registration process.
- Enter (and re-enter to confirm) your current Email Address, which will serve as your
 Masterlinx User Name. This will also be added to the contact information for your account.
- Enter (and re-enter to confirm) the **Password** you want to use.

Click the [**Register**] button to save your changes and create your online consumer account. You will see a message confirming your registration was successful, and a copy of that message will also be sent to the email address you recorded.

Chapter 2: Getting Started

In this chapter, we will walk through the step-by-step procedures to actually make the Consumer Portal work for you. We will go over the following: how to log into the Portal to access the meter reading information for all utility meters associated with your account, how to view your bill, and other functions that are available to consumers.

This chapter presumes that you have read **Chapter 1: Getting Set Up** and have already performed the online account registration as described there.

Welcome to the Consumer Portal for the Masterlinx™ Enterprise Management System!

Masterlinx is an online system that your utility service has chosen to fill their utility billing and meter reading needs. One of the many services we provide is the ability for their customers – you – to access parts of that online system and examine your own utility information, including: your current and previous billing statements, and paying your bill online. You can also examine your usage through various charts and reports; you can even download and save spreadsheet .CSV (Excel) and Adobe® .PDF files to your computer.

So... let's get started!

Accessing the System

Once you've performed the registration process as explained in Chapter 1: Getting Set Up – open your web browser, go to the web site www.Masterlinx.com, log in with the User Name and Password that you created earlier, and the Masterlinx Consumer Portal will open:



Along the left side of the screen you will see the Consumer Menu, which includes **My Billing Addresses** (to update mailing information for your utility account), **Pay Bill** (if your utility offers this option, you can pay your bill online), **My Meters** (shows the utility meter(s) installed at your property (and also the 'landing place' when you sign into the system)), **My Locations** (shows all the properties associated with your utility account), **Paperless Billing** (lets you sign up for email notifications instead of receiving billing statements on paper), **Automatic Bank Draft** (if your utility offers this service, you can configure your account information to automatically have your bank account drafted each month), **Contact Us** (to communicate any concerns you may have), and **View My Bill** (allows you reprint a copy of a previous billing statement).

In addition, if you have multiple accounts with the same utility, you may add additional accounts to your consumer login using **Consumer Register Another Account**, and switch between accounts using the **Consumer Customer Chooser**. If you have registered multiple accounts, the **Consumer Customer Chooser** will be your welcome page when you log in.

One thing you'll notice throughout the system is the [**Close**] button in the lower-right of every screen. Because of how the website programming loads 'under-the-hood' for the various screens and functions, we ask that you please click [**Close**] rather than use the 'back' button in your web browser.

Toolbar

Along the upper-right of your browser screen you will see the Masterlinx Toolbar, which includes options for the **Masterlinx Manual** (this document), **Settings** (for your online profile), and **Logout** to exit the system. Hovering over the "person" icon with your mouse will display the menu to select **Settings** or **Logout**.



NOTE: the Masterlinx™ Enterprise Management System keeps a running connection between your web browser and the main system database each time you log into the system. It is <u>VITAL</u> that you please **Logout** when finished with Masterlinx, to free up system resources for other customers using the system.

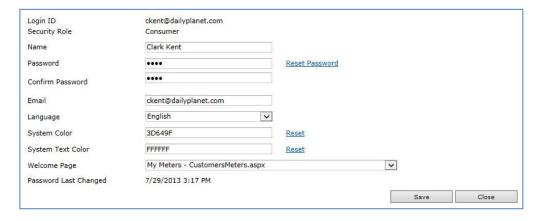
Masterlinx Manual

<u>Masterlinx Manual</u> is a link to this document, and clicking it will open an Acrobat[®] print-preview browser tab or window, depending on your web browser's settings.

From here, you can print or save the manual as an Acrobat .PDF file to your computer.

Settings

You can examine and edit your own login information by selecting **Settings** from the Toolbar:

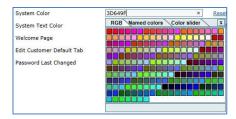


- Your Login ID is the email you used when you originally created this online profile, and can never be changed; even if you change the Email Address listed below.
- The Security Role indicates what type of system account you have, and cannot be changed.
- Masterlinx[™] does not allow you to see the **Password** that is already on file, but you can
 enter a new one here if necessary; or you can click **Reset Password** to have a link sent, via
 the email address listed below, that can be used to help reset your password.

- This is the **Email Address** that the system has on file for you. It can be changed, if you wish, and whatever you enter here will update both your online profile and the contact information your utility has on file for you.
- Language allows you to choose the displayed language for Masterlinx when you sign in; you
 can choose from the following seven options: English, UK English, French, French Canada,
 Spanish, Spanish Mexico, or Hebrew.
- You can even customize the System Color (the background around the white screen) and System Text Color.

Click on the field to bring up the color palette available (as shown here to the right), then click on the color you want it changed to.

If you change your mind, you can always use the **Reset** option to the right to restore the standard system color for each option.



- You also have the ability to set the Welcome Page, letting you choose which screen will load when you first sign into the system.
- Masterlinx also allows you to see when your Password was Last Changed.

Click [Save] to record your changes or [Cancel] if you change your mind.

My Meters

Even though this option is not at the top of the Consumer Menu, this document will begin with the **My Meters** page as this is the default **Welcome Page** for new consumer login accounts.



As shown in the picture above, you will see a list of all the utility meters associated with your account. For each meter, you will see the following:

- Location Number which service location (property) this meter is installed at.
- Service Type the type of service this meter measures, such as water, natural gas, or electricity.

- Electronic Number and Serial # these are the identifying numbers for this meter: the Electronic Number is the number associated with the electronic component attached to the meter; the Serial Number is the number attached to the physical meter itself.
- Last Read and Last Read Date the most recent reading that was received from the meter, and the date in which it was received on.
- Map Meter the GPS coordinates (latitude and longitude) that your utility has on fileyou're
 your property, if your utility uses this feature.

Electronic Number

You can click on the meter's **Electronic Number** to open the View Meter screen, where you can see more information regarding this service meter:

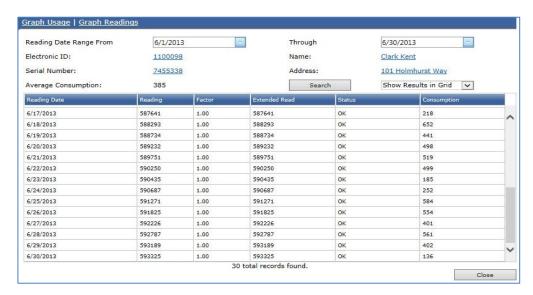


You'll see some of the same information as before, with the addition of the Meter Size and Units of Measure. However, you now have additional options within the Meter Menu to the left: **View Meter** (this screen), **Daily Readings**, and **Data Logs**.

You can also click on either the **Location Number** or **Location Address** to see more information about your service location, the same as if you selected **My Locations** in the Consumer Menu at the beginning (more on that in the My Locations section later in this chapter).

Daily Readings

Many utilities use an AMR (automated meter reading) system to collect meter readings daily or even several times a day. Select **Daily Readings** from the menu to see what recent readings are on file for your meter:

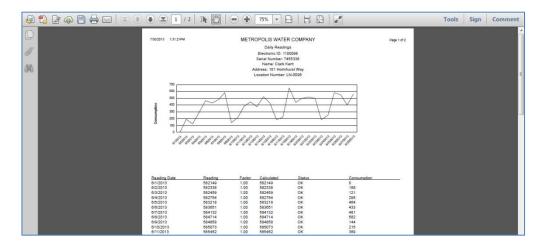


If they are available, this screen will show the daily readings for your meter going back 30 days from 'today'; if you want, you can change the date range above and click [**Search**] to update the listing with new results.

- Reading Date is the date in which the reading was received.
- Reading is the numbers that were showing on the meter's register (electronic component) when the reading was recorded/received.
- Factor describes the reading resolution of your meter. The example above shows a Factor of "1", meaning each swing of the odometer needle is one unit (one gallon, one cubic-foot, etc.). If your meter was such that each swing of the needle equaled 10 gallons, for example, then it would have a Factor of "10" instead, and the Extended Read would include one additional zero; a Factor of "100" would stand for two zeros, and so on.
- The Extended Read shows the full meter reading with the Factor being included.
- The Status shows the condition of the meter when this reading was recorded.
- Consumption is the usage that is calculated using the following formula: current extended read previous extended read= consumption.

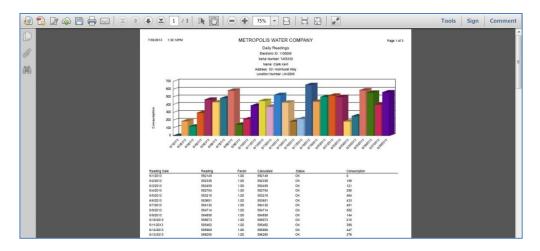
In addition to the default *Show Results in Grid*, you have other search results options, such as: *Export to CSV/Excel* which will download a Microsoft[®] Excel[®]-compatible .CSV spreadsheet file to your computer.

You also have the option to *Print Line Graph*; this will generate a report in an Adobe[®] print-preview format, in a separate window or tab in your internet browser, showing a list of the readings and consumptions.



The chart at the top of each page shows all the consumptions listed on that page in a graph, for easier examination.

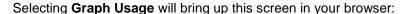
You can also print a bar graph, which displays the same information, but with the consumption chart showing in a bar-graph instead of a line-graph (see picture on top of next page):

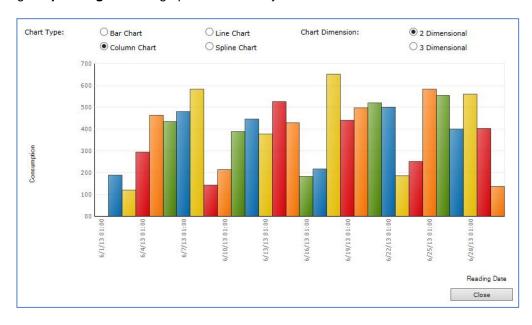


As with any print-preview window within the Masterlinx™ Enterprise Management System, you can print the report or save it to an Adobe[®] .PDF file on your computer.

Graph Usage/Readings

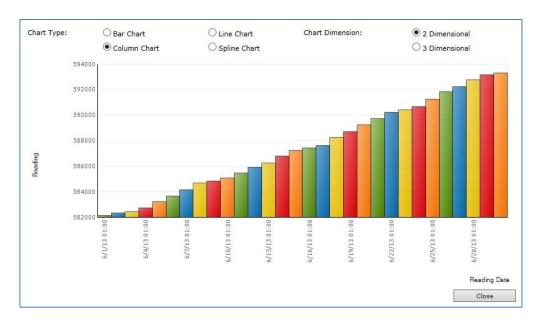
In addition to the search results, you will see options in the margin above the upper-left corner of the screen to either **Graph Usage** or **Graph Readings**.





You will see the consumption information that was listed in the search results, on the previous screen, displayed in a data chart. You can select from the different **Chart Types** available and see the chart change to match.

The other option you have is to select **Graph Readings** to display the meter readings instead of consumption (see picture at top of next page).



You also have the same Chart Type choices above as you did with the Graph Usage screen.

Data Logs

A Data Log is a detailed listing of your meter's reading history. Select the **Data Logs** option within the Meter Menu, to the left, to look at your reading and consumption in greater detail (see picture below).

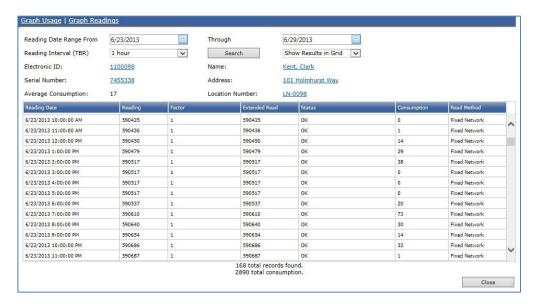


Set the **Reading Data Range From** and **Through** for the time-frame that you would like to take a look at.

The **Reading Interval** lets you decide how far apart you want the readings to be: 30, 14 or 7 days in between, 24, 12, 6, or 1 hour(s) in between or even 15 minutes in between readings.

NOTE: Your particular utility system may or may not have as detailed of a reading history available for your meter; it just depends on how they collect your meter readings. Many utilities only read their customers' meters once a month or every quarter (every 3 months) to generate a billing statement with. If your utility system uses a "fixed network" of electronic equipment to collect meter readings around-the-clock, then they have will a more detailed listing available for you to view.

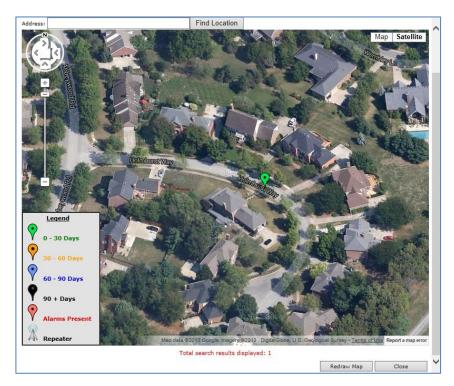
Make your selections and click the [Search] button to see the results:



You have the same [**Search**] results – *Show Results in Grid*, *Print Line* or *Bar Graph*, and *Export to CSV/Excel* – as with the Daily Readings screen (as previously described in this chapter).

Map Meter

Back on the main **My Meters** screen— **Map Meter**. If that information is available, you will see the GPS latitude and longitude coordinates for your meter or property listed in the **Map Meter** column. Click on the coordinates to show this location in Google[®] Maps:



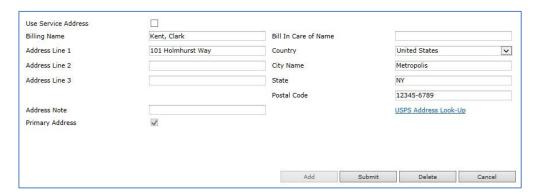
My Billing Addresses

Select **My Billing Addresses** from the Consumer Menu to see what mailing address your utility has on file for your account.



Normally you'd see only the one address listed, though some utility customers – such as 'snow birds' that live in more than one location through the year – may need more than one mailing address on file to help their utility send their bill- or other mail- to them.

Click on the address shown to see more information:



This is the mailing information your utility has on file for your customer account with them. If there are any errors, you can make the necessary changes needed and click [**Submit**] to send those changes to your utility system; they will review your changes before confirming and saving them for use.

NOTE: Throughout the Masterlinx™ Consumer Login website, you will see places to make corrections and [**Submit**] those changes to your utility; as these changes would affect your account with them, those changes must be reviewed by someone at the utility office before they can be confirmed and recorded permanently.

If your mailing address is the same as the service address, you can select the **Use Service Address** option to copy your property information over.

Also, if you need to research something such as the correct 'zip+4' for your address, you can select the **USPS Address Lookup** option to the right and it will open up another browser tab with the Zip Code Lookup page on the United States Postal Service website.

My Contacts

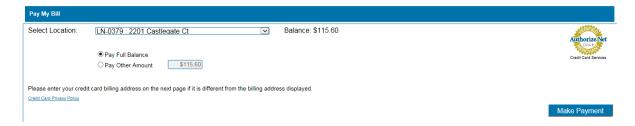
This page allows you to add additional contact information to your account, such as: phone numbers or email addresses; as well as submit requests to change existing contact information.



To add a new contact, click the Add button, enter your information and click **Save**. To submit changes to an existing contact, click on the contact description, enter your changes, and click **Submit**.

Pay Bill

If your utility offers the ability to pay online, you can pay your current account balance immediately by selecting **Pay Bill** from the Consumer Menu; if your utility does NOT offer this service, the **Pay Bill** option simply will not show on the Consumer Menu:



Your current account balance is listed to the right of the **Select Location** field.

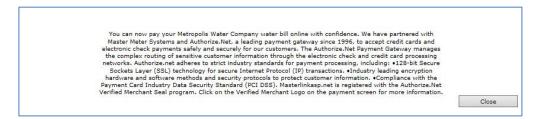
Select the location you wish to pay, and whether you are paying the full balance or a different amount. If you select **Pay Other Amount**, enter the amount you wish to pay.

If your account balance is \$0 (or less), the screen will default to Pay Other Amount, which will default to \$0. If you wish to pay an additional amount on your account, enter the amount to pay and click *Make Payment*.

Click **Make Payment**. This will transfer you to your utility's payment gateway site: Authorize.net, XpressPay, or Official Payments. You will enter your credit card information on this site to complete your payment. Once your payment is completed, you will be returned to the Masterlinx website. *It is important that you not interrupt this process for your payment to be recorded properly with your utility.*

NOTE: If you decide to not to make payment, be sure to click the **Cancel** button on the payment company website.

You can also select the **Privacy Policy** link below to view your utility's credit card privacy statement, which would be similar to the one presented here:



My Locations

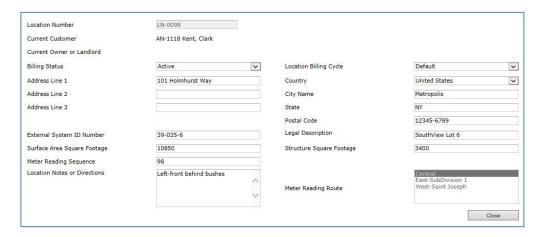
You can select **My Locations** from the Consumer Menu to see information regarding the properties that are associated with your customer account:



Most utility customers would only see the one property where they reside, though many accounts can easily have several service locations on file – such as with commercial or rental properties.

The **Location No**. is the designation that your utility uses when referring to your property; and the **Read Seq No** (meter-reading sequence number) shows where on the meter reading route listing your property appears for the utility's field personnel to use.

Click on the **Location No**. to see more detailed information about that particular property:



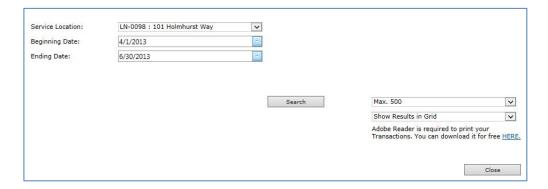
Here are the details your utility system has on file for your property:

- The Location Number is a unique ID assigned to each property that your utility services.
- The Current Customer (you) is shown here, as is the Current Owner or Landlord if this
 happens to be a residential rental or commercial lease property.
- Whether the **Billing Status** is either *Active* or *Inactive*.
- The Address/City/State/Postal Code for this service location.
- The External System ID Number shows additional information that your utility may need to reference from time to time, such as the property deed book & page number.
- As well as the Legal Description of the property, again usually relating to the property deed.
- Your utility may or may not have the Surface Area (property/lot size) and Structure Square
 Footage on file to be displayed here.
- The Meter Reading Sequence is how your utility sorts the properties within the meter reading route – is the same as the Read Seq No. shown on the main Locations listing.
- Also, the Location Notes or Directions records additional information about this property, such as driving directions, meter location on the property, or other general "FYI" information.
- And, lastly, you can see which Meter Reading Route this property is included in.

The information shown in this screen is displayed for your reference, and cannot be changed or updated from the internet – if you see any errors, you will need to contact your utility system directly to get those corrected.

My Transactions

If you want to see a listing of recent activity on your account, select **My Transactions** from the Consumer Menu to the left:

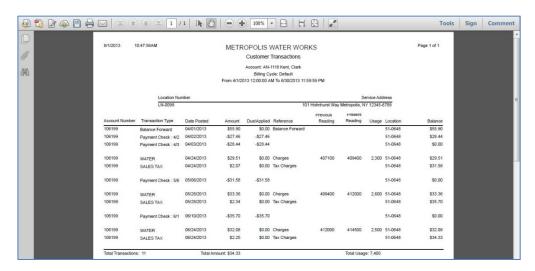


Select the **Service Location** (if you have more than one) and the **Beginning** and **Ending Dates** you are interested in, then click the [**Search**] button to see the transaction history listed on screen:



Here you'll see all the billing transactions on file for your account within the date range that you specified. The first transaction listed will always be the "Balance Forward", because this is what your account balance showed as of the **Beginning Date** above; then after that you'll see the billing transactions on file, including any charges, taxes, account adjustments, and payments.

You can change the **Beginning** and **Ending Dates** and [**Search**] again, until you get the information you need: then you can change the results to *Export To CSV/Excel* to download a spreadsheet file containing this information, or you can select *Print Preview Results* to open an Adobe[®] browser window or tab:



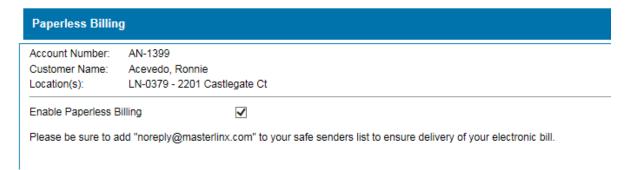
If you experience any problems getting the Adobe[®] window or tab to display correctly, you may need to install or update the Adobe Reader program on your computer. Back on the main **My Transactions** screen, to the right you'll see the message "Adobe Reader is required to print your

Transactions. You can download it for free <u>HERE</u>", click the <u>HERE</u> link to be taken to the Adobe Reader installation page on Adobe's website. If that link is not working correctly for you, you can transcribe this link into the address bar of your internet browser: http://get.adobe.com/reader/.

Paperless Billing

Paperless billing is where a utility system emails billing notifications instead of mailing out paper copies, which would include a link for you to click on to open a web page where you can pay your current balance online rather than having to mail a check or pay in person at the utility office.

If your utility system offers paperless billing – and you are interested in this service – select **Paperless Billing** from the Consumer Menu:



Simply indicate if you wish to take part in this service or not, and click [Save] to record your selection.

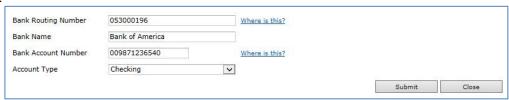
You will want to add whatever email address is shown on the screen to your email program's contact list or safe senders list, to make sure your computer's security software doesn't accidentally block your email notifications.

Please note that you will receive an emailed notice that your bill is available to view by logging into your account, rather than receiving your bill by email.

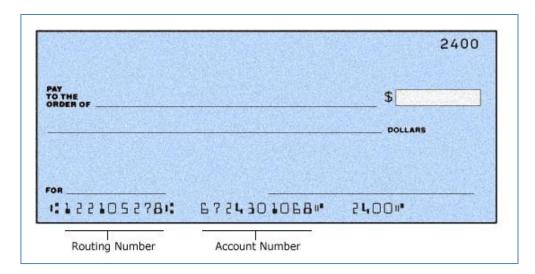
If you are currently part of the paperless billing program, and you wish to stop receiving email notifications, then simply uncheck the option and [**Save**] to turn this service off for your account, and begin receiving traditional billing statements through the mail again.

Automatic Bank Draft

Many utility systems offer automatic bank drafting for their customers, where charges will be drafted against a customer's bank account on or around a certain day of every month or quarter. If your utility offers this service, you can select **Automatic Bank Draft** from the Consumer Menu to sign up for this:



Enter the **Bank Routing Number** and your **Bank Account Number** as printed on one of your checks or deposit slips – as demonstrated in this example:



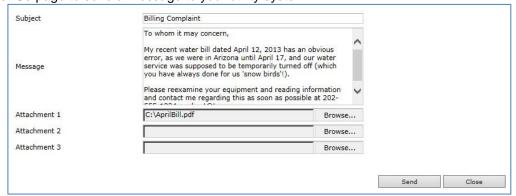
You will also need to indicate whether your bank **Account Type** is either *Checking* or *Savings*. Once everything's entered, click the [**Submit**] button to send your information to your utility system office, for final testing and implementation.

As with your credit card information, the Masterlinx™ Enterprise Management System stores your bank account in such a way as no one else can see the complete information. Even if you should navigate to another screen within the Masterlinx Consumer Portal and then return to the **Automated Bank Draft** page, you would only be shown the same limited information as the people working for your utility system:



Contact Us

Sometimes you may need to contact your utility office, but it's outside their regular business hours, or the issue is fairly involved and may need detailed explanation. In that case, you can use the **Contact Us** page to send a message to your utility system:



Enter the **Subject** and **Message** just like you would with a regular email, and there are places for you to add up to three **Attachments** if needed.

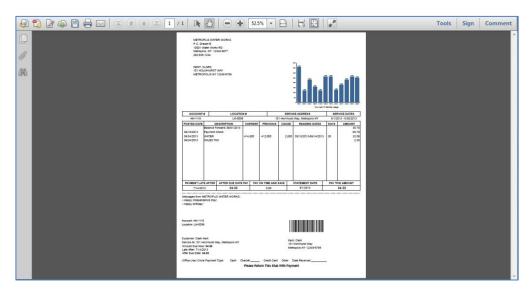
When finished, click [**Send**] and the Masterlinx[™] Enterprise Management System will send an internal system message containing your content to the Masterlinx administrator for your utility system.

View My Bill

Select **View My Bill** from the Consumer Menu if you ever need to view or print a previous billing statement:



Confirm which service **Location** this billing would be in regards to (if you have more than one), and which **Billing Period** you need the statement for, then click [**View**] to create an Adobe[®] print preview screen of that billing statement:



As always, you can print this to paper or save it as an Adobe® .PDF file on your computer.