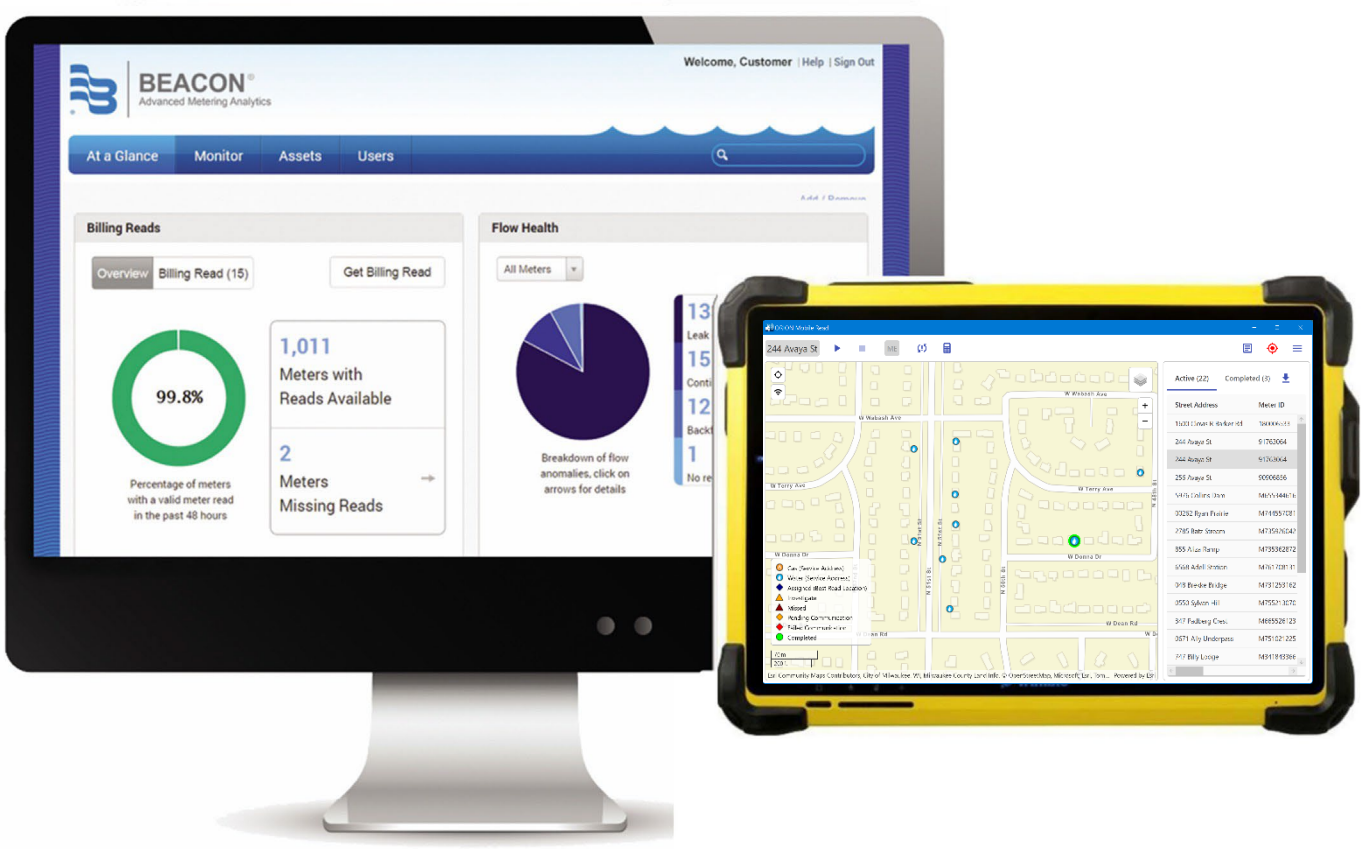
Badger Meter

BEACON® AMA

Mobile System Billing Cycle



BEA-TR-03345-EN-02 (July 2024)

Training Guide

CONTENTS

About this Training Guide	3
Typographic Conventions	3
Technical Support	3
BEACON® AMA Overview	4
Logging in to BEACON	4
The BEACON Billing Cycle	6
Importing Account and Meter Data from Billing	7
Creating Field Assignments	11
Verify the Meter Reads are in BEACON	13
Exporting Reads to Billing – At A Glance	14
Exporting Reads to Billing – Monitor	17

ABOUT THIS TRAINING GUIDE

This document is meant to assist and guide the training session Please refer to *helpbeaconama.net* for more complete information, if you have additional questions, or would like additional details about the processes and software

All of the training materials including the current Training Guides, Quick Reference Guides and How-To videos are available for download at *https://helpbeaconama.net/training*

Typographic Conventions

- Items on the software screens that you need to select or choose by clicking a button, highlighting, checking a box or another similar means are in **bold** text and capitalized in the manual

  Example: Click the **View Report** button
- Names of options, boxes, columns and fields are *italicized.* In most cases, first letters will be capitalized

  Example: The value displays in the *Status Information* field
- Messages and special markings are shown in quotation marks

  Example: "Service Stopped" displays in the title bar

NOTE: Names, addresses and other customer-related information displayed in screen examples were created for demonstration purposes in this manual No actual customer information is included

Technical Support

If you encounter any problems or have any questions about the mobile billing cycle, please contact Badger Meter Technical Support by phone, e-mail, or fax

Phone: 800 616 3837

E-mail: techsupport@badgermeter.com

Fax: 888 371 5982

BEACON® AMA OVERVIEW

BEACON Advanced Metering Analytics (BEACON AMA) is a completely web-based software that can be accessed on any device with an active internet connection This ensures that every single time you log in to BEACON, you are accessing the most recent version of the software All updates and improvements are available to you immediately, giving you access to all of your data housed on BEACON's highly secure, cloud-based databases

BEACON AMA supported web browsers include the latest and next previous major releases of Google® Chrome, Microsoft® Edge on Chromium, Apple® Safari®, and Mozilla® Firefox®

Badger Meter will set up the utility's BEACON AMA portfolio The portfolio encompasses the utility's specific hardware assets (endpoints, encoders, meters, mobile reading technology), customer account information, consumption data, and utility specified BEACON AMA user access accounts The BEACON AMA Onboarding Questionnaire is used to collect information from the utility as to its people, operations and processes, which is then used in configuring the utility's BEACON AMA portfolio and establishing the utility's portfolio owner and initial Admin User

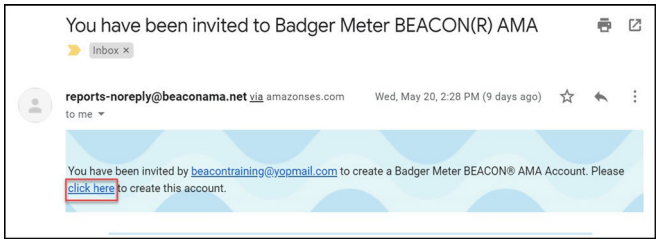
Each utility has its own BEACON AMA portfolio

BEACON AMA URL: *https://beaconama.net*

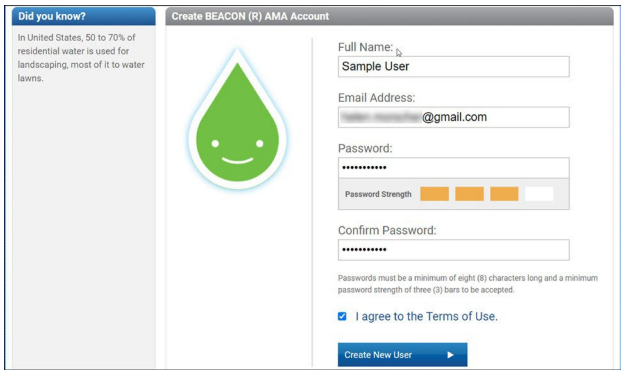
Logging in to BEACON

Before you log in to BEACON for the first time you will need to set up your login credentials You will receive an email invitation to join your utility's BEACON AMA portfolio as shown in the image below

Click on the link in the email to set up your BEACON user ID



BEACON requires that you create a 'strong' password When you see three orange bars or four green bars, the system will allow you to use the selected password Different combinations of upper and lower case letters as well as numbers and special symbols can be used to create a 'strong' password



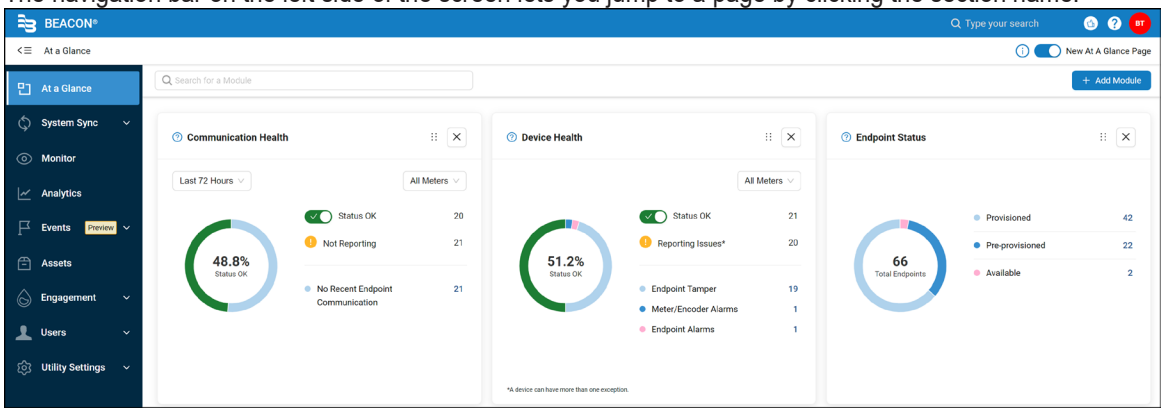
If you forget or wish to change your password, click on the "Forgot your password?" link on the BEACON log in screen and the system will send out an email with a link to reset your password

Once your login credentials have been established, you will access BEACON directly through your web browser by visiting *https://beaconama.net* and entering your username and password

BEACON AMA USER INTERFACE

There are 9 pages within the BEACON software: At a Glance (AAG), System Sync, Monitor, Analytics, Events, Engagement, Users, and Utility Settings.

The navigation bar on the left side of the screen lets you jump to a page by clicking the section name.



At a Glance is a dashboard view of your water system It provides a quick snapshot display of the overall health of your water system and is customizable for each user

System Sync is where you upload Data Exchange files to synchronize BEACON with your billing and customer information systems.

Monitor allows you to view the water usage and account details for the provisioned endpoints in your water system This section of the software provides a greater level of detail and allows you to filter a group of accounts or search for a specific account you wish to view

Events gives you control over thresholds and parameters related to data from networked meters.

Analytics acts like a dashboard, providing enhanced visibility into Leaks and EyeOnWater signup and usage.

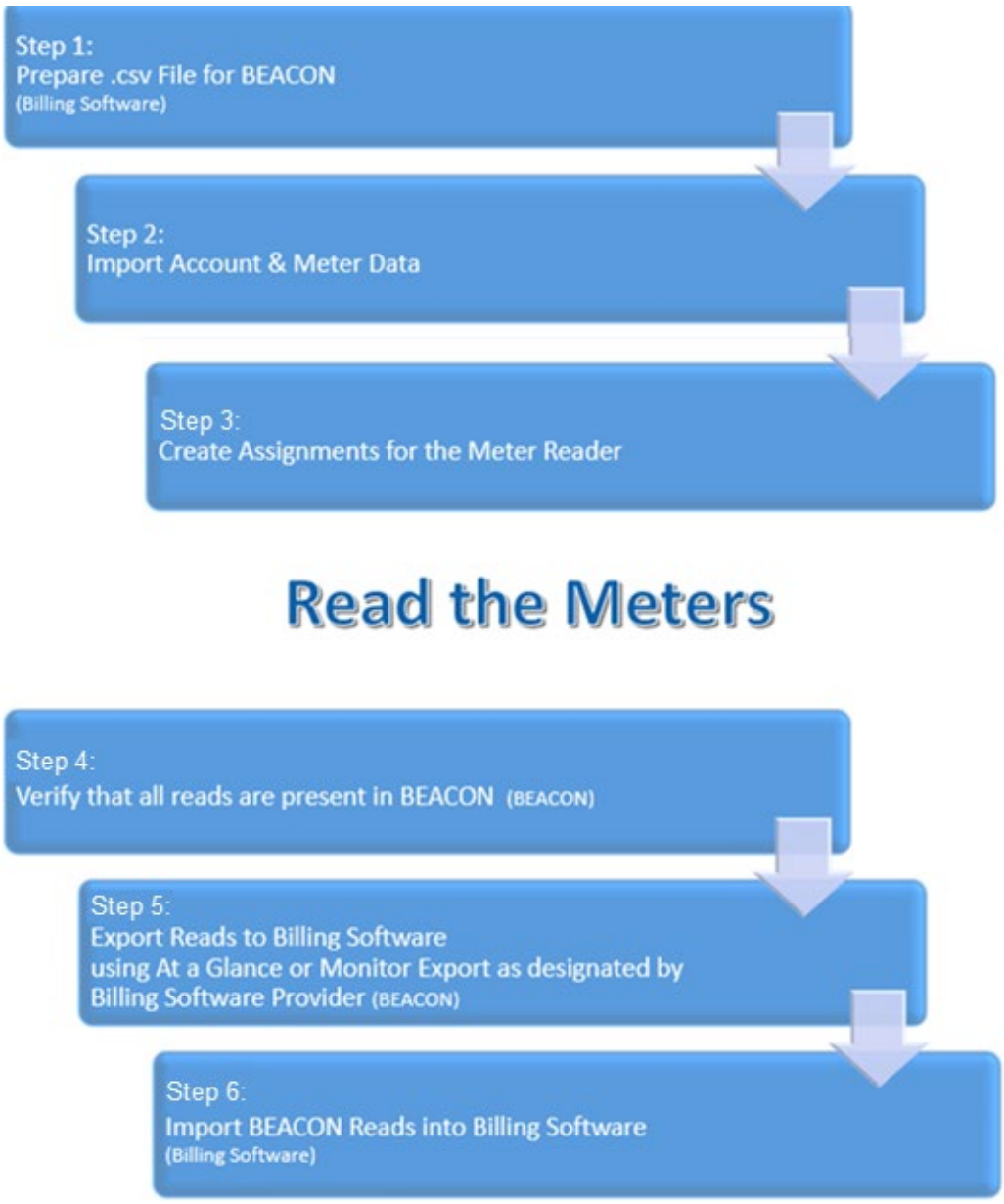
Assets lets you get detailed information about hardware assets in your system.

Users allows you to view, create, and manage the BEACON AMA logins for the utility staff and view a historical record of all customer Account ID information. If EyeOnWater has been enabled for the utility's portfolio, the *EOW Users* and *Manage EOW* sections are available. These sections display a list of customers with logins for the EyeOnWater customer portal, and allow the utility user to manage customer access to the portal.

Utility Settings lets users with administrative privileges view and in some cases change default settings in BEACON.

THE BEACON BILLING CYCLE

The BEACON billing cycle is a simple 6-step process that begins and ends with your billing software If you are unsure of how to complete step 1 or step 6 in the flow chart below, get in touch with your billing software technical support for assistance This training manual contains detailed, step-by-step instructions for step 2 through step 5



Importing Account and Meter Data from Billing

NOTE: This process can be done as often as you wish to update your accounts and sync the account information from your billing software into BEACON At a minimum, a new billing file should be imported into BEACON the night before you export the billing reads to ensure ample time for system processing of the billing file data

1 Create a new billing file from your billing software If you are unfamiliar with this process, contact your billing software support for instructions

2 Make sure you know where the billing software has placed this file on your computer, as well as what the file is named In BEACON you will need to browse to the file location so you can upload the file The file can have any name, but it must end in csv or txt

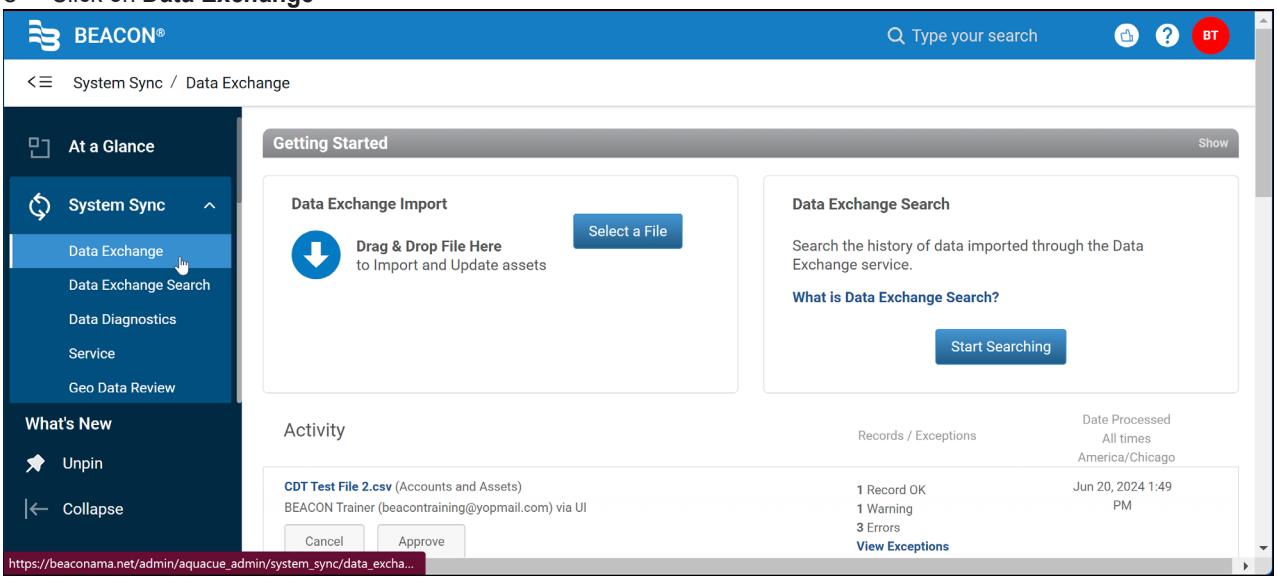
For Example: Meterreads csv

Billingexport txt

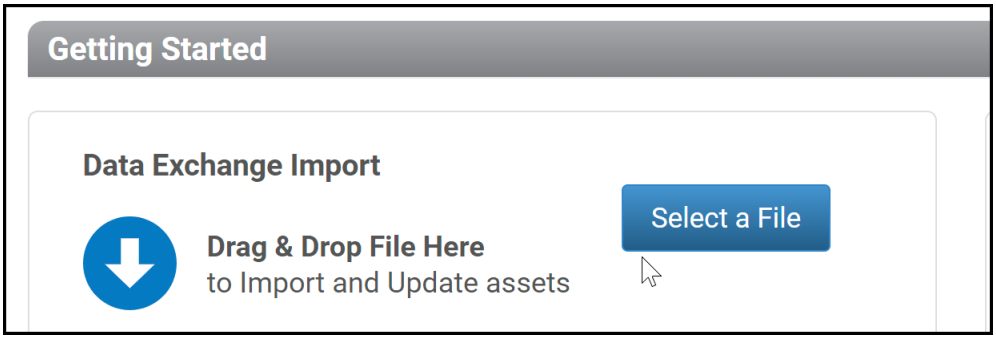
Log in to the BEACON website (*https://beaconama.net*)

4 Click on **System Sync**

5 Click on **Data Exchange**

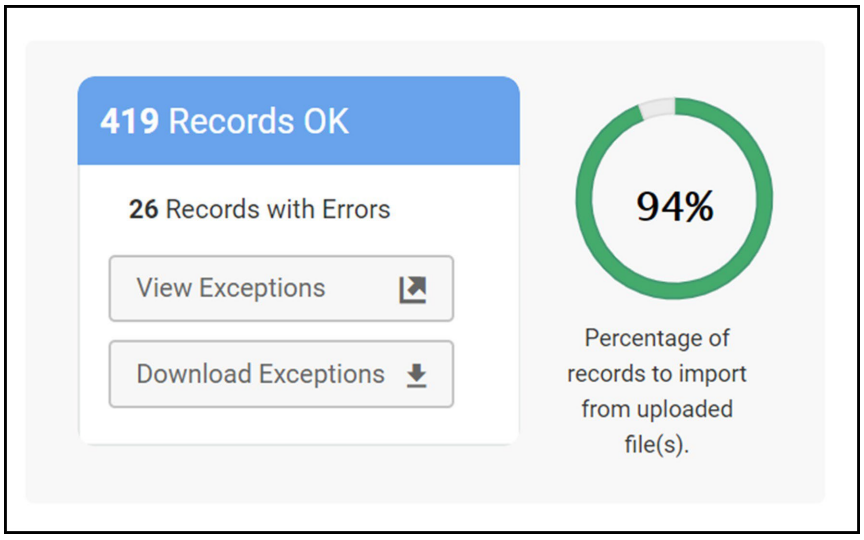


6 Click on the **Select File** button and browse to the *Import* file on your computer



NOTE: Each time you select a file for the *Import* module, the system scans the file for issues without importing records This allows you to make updates and corrections before proceeding to import

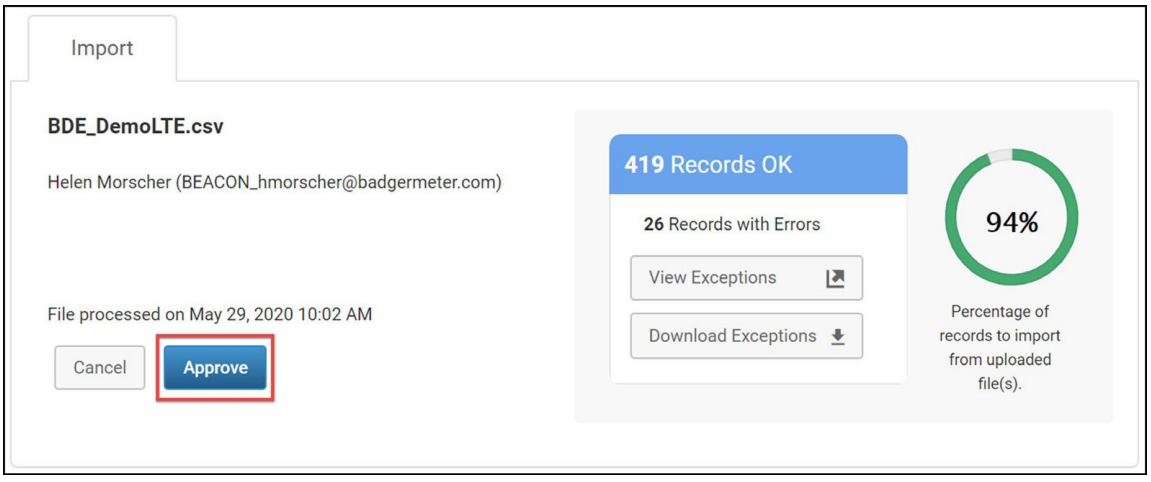
When the file validation is complete, the number of records with and without errors/warnings is displayed A *Warning* is an indication that something in BEACON will change when the import is applied and the system is informing you of the change prior to saving and applying the change An *Error* is an indication that something in the file is going to be skipped when it is imported It could be an entire record line or just part of the record line depending on the error specifics



NOTE: Do not proceed to step 7 unless you are certain you want to sync the data from the file into BEACON If needed, click the **Cancel** button to end the process without saving any changes Make any needed corrections in your billing software and create a new billing file

You must repeat steps 6-7 to process the updated billing file before continuing

7 Click **Approve** to proceed with the import



IMPORTANT

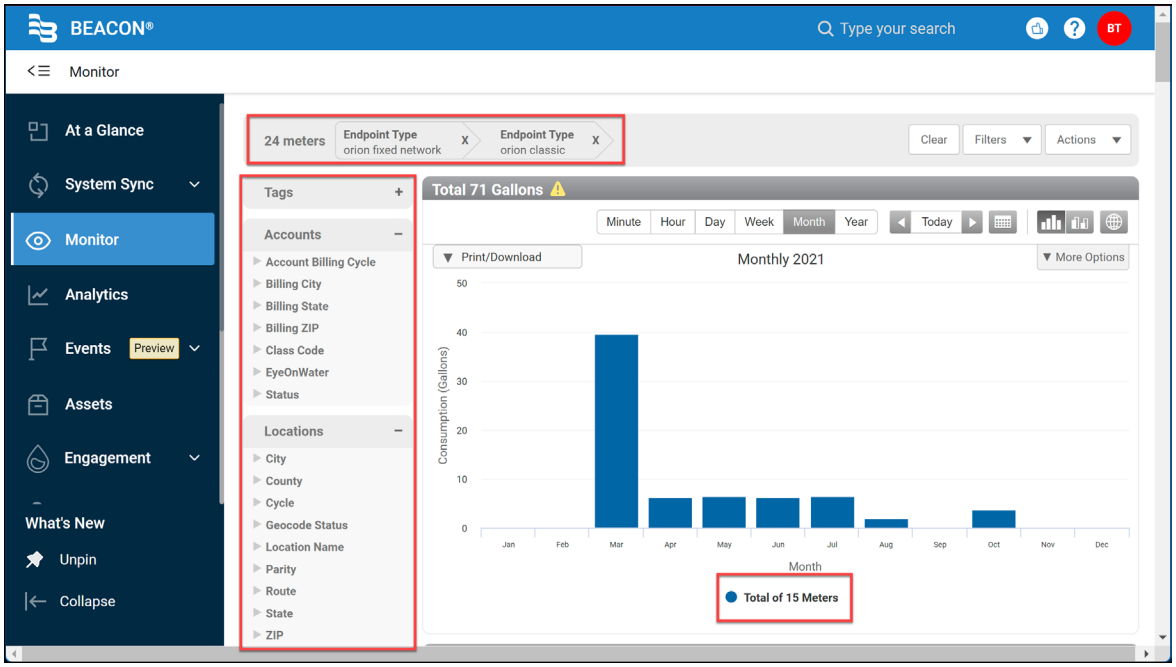
As a best practice, Badger Meter Inc. recommends that you allow several hours for the import to completely process before you create the Field Assignments.

After you have imported the updated billing file from your utility billing software and the system processing of that file is complete, you will create the Field Assignments.

Creating Field Assignments

Creating field assignments is how you push the accounts and meters you want to read over to the reading device.

1 On the Monitor page of BEACON, use the filters on the left panel to display selected account records while hiding the other accounts in the database.

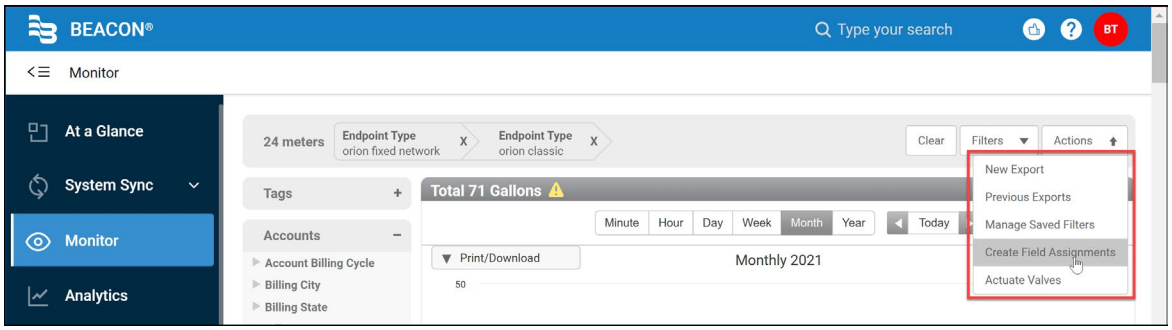


NOTE: If filters are not used, all the meters in the system are selected and displayed.

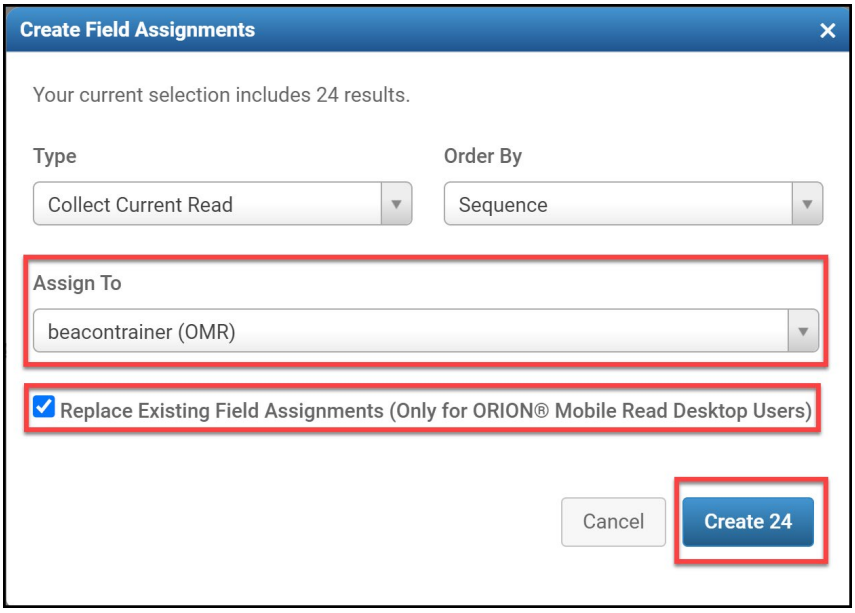
2 To use a filter, click the arrow next to the item and then select the meters you wish to display.

NOTE: You can save these filters to be used again at each billing cycle so that they do not need to be selected individually every time you create assignments.

3 When all the desired filters are applied and the selected meters are ready to be assigned to a reading device, open the **Actions** menu and select **Create Field Assignments.**



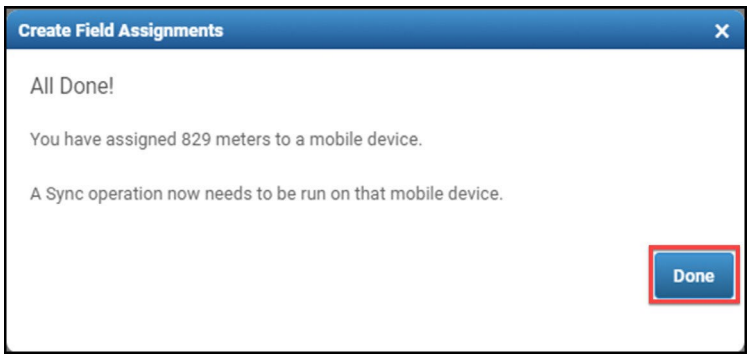
4 The Create Field Assignments window opens Click on the Assign To dropdown and select the user to assign the selected accounts.



NOTE: Be sure to check the box to Replace Existing Field Assignments to clear any items left over from the previous reading cycle.

5 Click the **Create** button.

6 A message displays confirming the meters have been assigned Click the **Done** button.

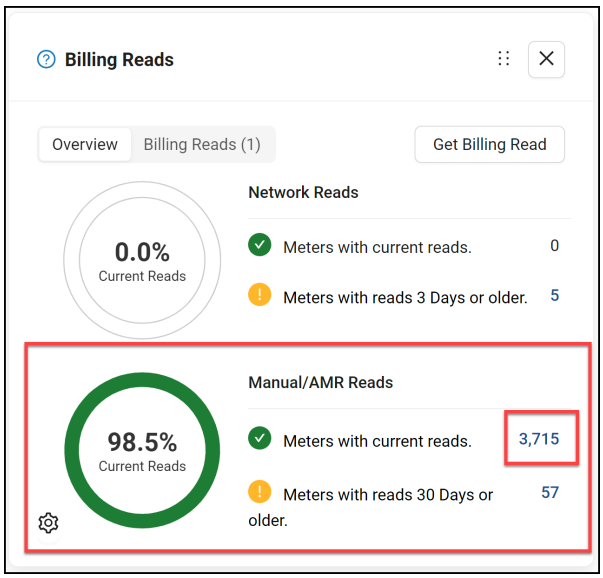


You have completed all the necessary steps in BEACON.
A data sync needs to be completed on the mobile reading device(s) and the meters must be read.

Verify the Meter Reads are in BEACON

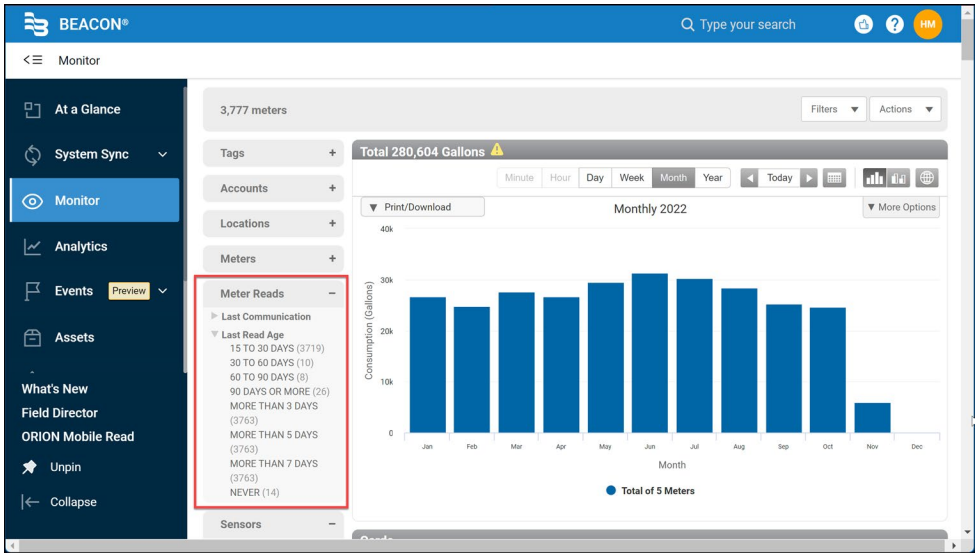
After the meter reader has completed reading all routes, you must verify that all reads are present in the BEACON database prior to creating the billing export It can take several hours for all the reads to fully upload into BEACON

1 Look at the *Billing Reads Module* on the **At a Glance** tab It displays the number of Manual/AMR meters with current reads and with reads that are 30 Days or older



3 On the Monitor Tab use the filters to select the accounts you just read

4 Activate the *Last Read Age* filter to see if any of the selected accounts are unread



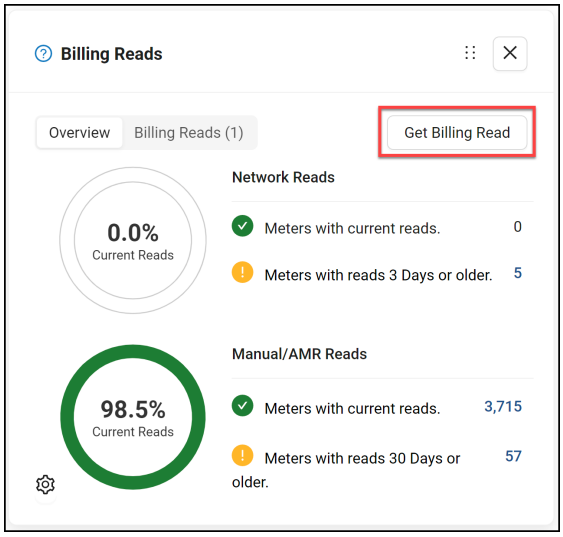
5 If desired the meters can be reassigned to the meter reader using *"Creating Field Assignments" on page 11*

Exporting Reads to Billing – At A Glance

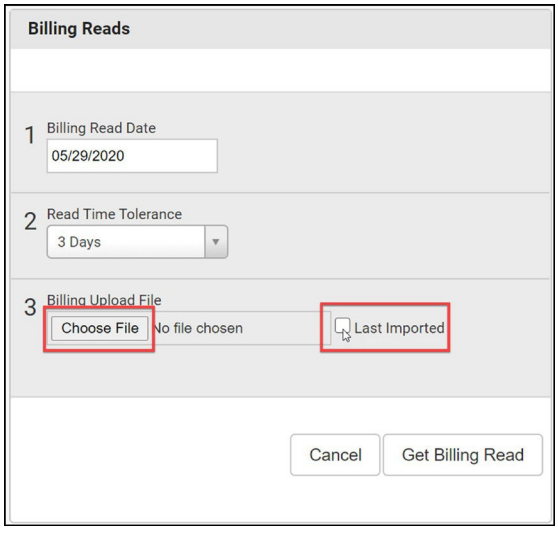
Follow the instructions in this section if you have the *Billing Reads Module* available on the **At A Glance** tab If this module does not exist in your BEACON software, skip ahead to the *"Exporting Reads to Billing – Monitor" on page 17*

You must first create a new billing file from the billing CIS that contains only the accounts you wish to bill

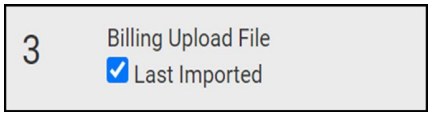
1 On the **At A Glance** page, scroll down to the *Billing Reads Module* and click on the **Get Billing Read** button.



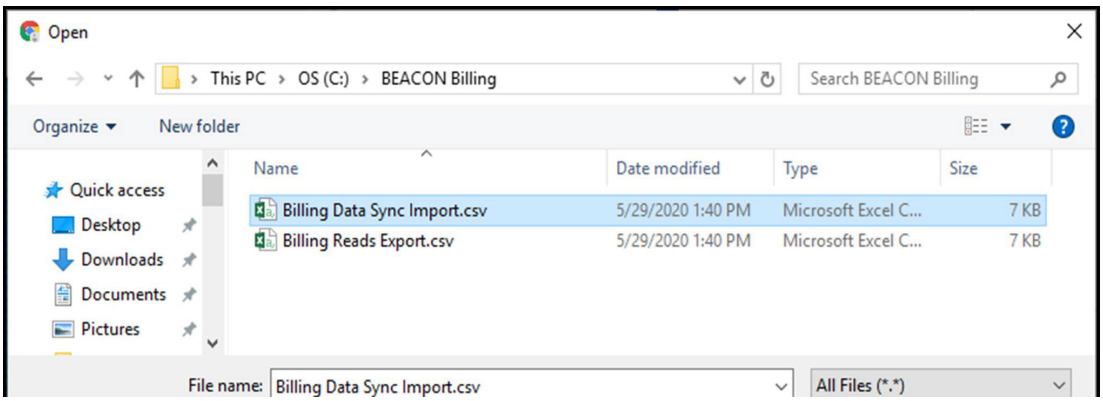
2 Select the **Date** and **Read Time Tolerance,** then click on the **Choose File** button or select the **Last Imported** option



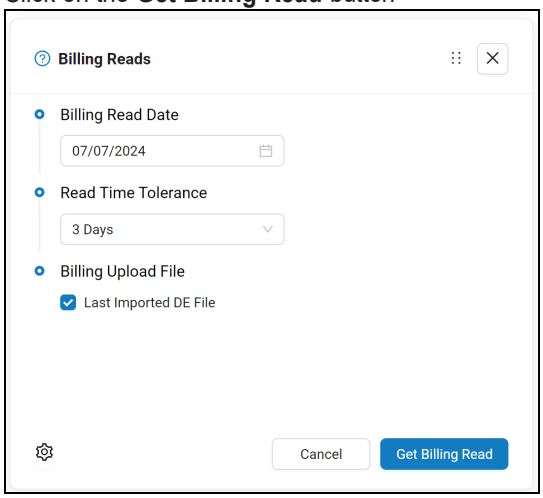
3 If you selected **Last Imported**, the system will automatically use the last file you imported to build your billing export file Go to step 4



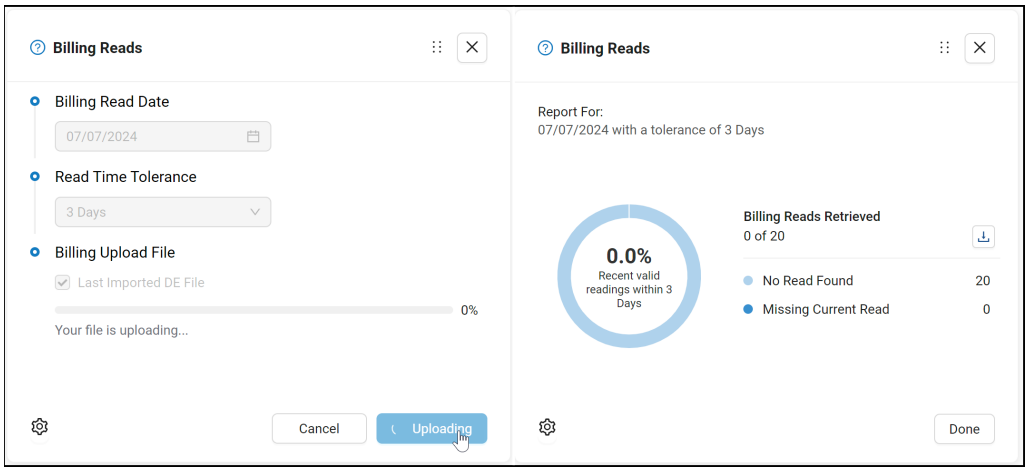
If you selected **Choose File**, browse to and open the file from the billing software You will need to know where the billing software has placed this file on your computer as well as what the file is named The file can have any name, but it must end in csv or txt



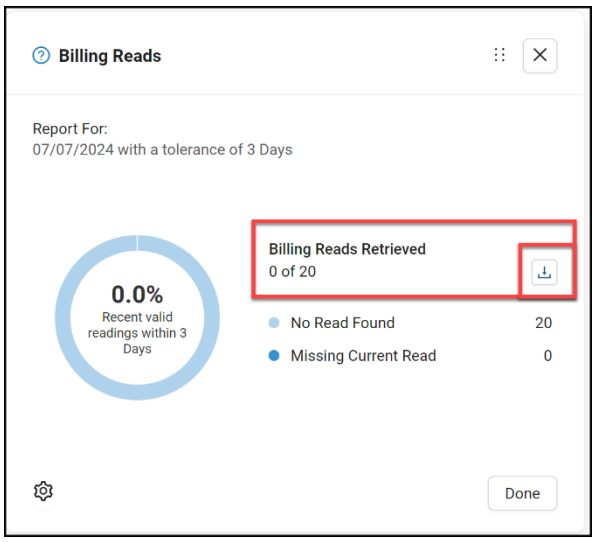
4 Click on the **Get Billing Read** button



The billing export is processed and the module displays the percentage of accounts that have a read for the time tolerance selected in a ring graph, as well as the number of meters that are in the file that do not have a current reading in the time frame selected (Missing Current Reads) or do not have a read at all (Not Found)



5 Click on the **Download Billing File** button



6. Save the file in the location, using the name and format that your billing software requires

NOTE: Each browser handles the download of the file differently Opening the file in Excel can corrupt the file It is best to save the file without opening it, if possible

7 Click on the **Done** button when you are finished with the billing process

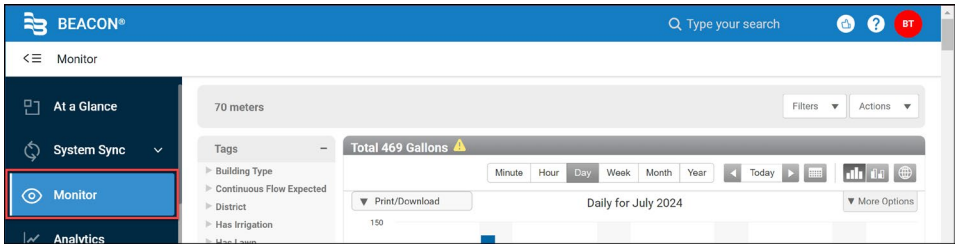
8 Complete the process by logging into your billing software and importing the file from BEACON If you are unfamiliar with this process, contact your billing software support for instructions

This completes the billing cycle using the At A Glance Billing Reads module Return to page 7 to begin the process for the next billing cycle

Exporting Reads to Billing – Monitor

Follow the instructions below if your billing system provider has designated use of the **Monitor** export function for exporting your billing reads If your billing system provider has designated use of the **At A Glance** *Billing Reads Module,* please refer to *"Exporting Reads to Billing – At A Glance" on page 14*

1 Click on the **Monitor** tab



2 Identify the desired account or group of accounts using one or more of the following steps: a

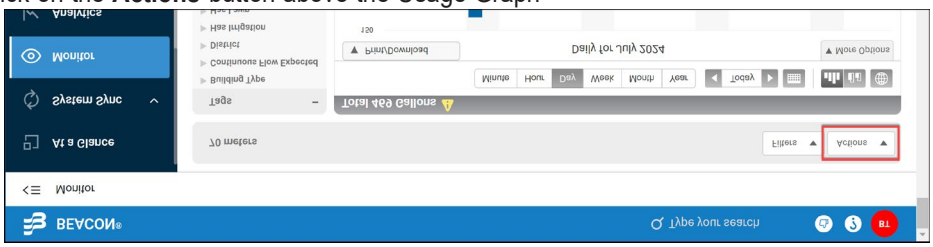
Use the filters on the left side of the screen

b Enter the name, account ID, or other data into the search field

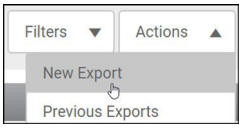
c Scroll through the endpoints list to find the card and use **More> Hide Other Meters**

NOTE: The export will capture all the provisioned meters unless the meters are filtered using one of the methods above

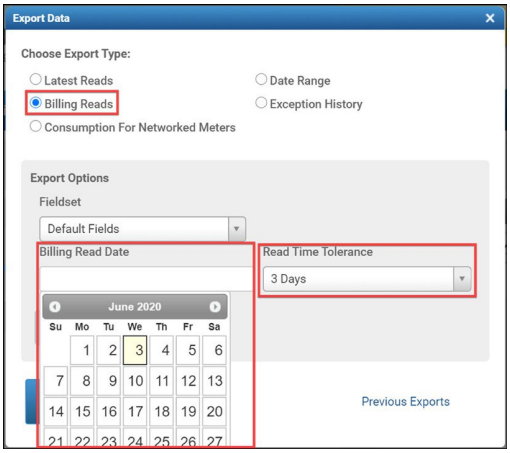
3 Click on the **Actions** button above the Usage Graph



4 Click on **New Export**

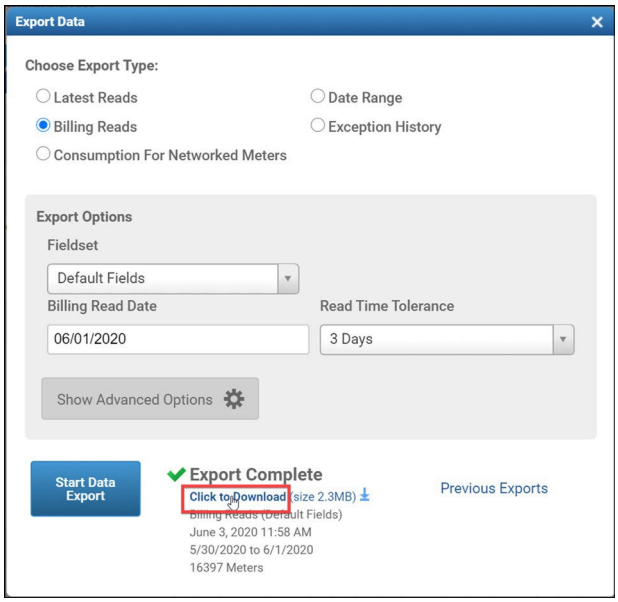


5 Select **Billing Reads**, the **Billing Read Date** and **Read Time Tolerance**



6 Click on the **Start Data Export** button

7 Click on the **Click to Download** link



8. Save the file in the designated location using the name required by your billing software

9 Complete the process by logging in to your billing software and importing the file from BEACON If you are unfamiliar with this process, contact your billing software support for instructions

This completes the billing cycle using the Monitor Export function. Return to page 7 to begin the process for the next billing cycle.

SMART WATER IS *BADGER METER*

BEACON and ORION are trademarks of Badger Meter, Inc Other trademarks appearing in this document are the property of their respective entities Due to continuous research, product improvements and enhancements, Badger Meter reserves the right to change product or system specifications without notice, except to the extent an outstanding contractual obligation exists © 2021 Badger Meter, Inc All rights reserved

www.badgermeter.com