

How to Set Thresholds and Notifications

You can set up daily, weekly or monthly Thresholds for any active meter on your account. In addition, you can set up Notifications for any set Threshold. This way, the program will notify you by email or by text when you meet Threshold criteria you set.

First, let's set up our contact information so it will be in place when we set up Thresholds and Notifications. While on the Dashboard, go to the menu and click **Settings** and then click **Contact Methods**.

The screenshot displays the Rock Hill South Carolina CustomerConnect dashboard. The top navigation bar includes the Rock Hill logo, a 'Meters' counter showing 3, and a 'Locations' counter showing 1. The main header area features a 'Welcome to CustomerConnect' message with a testing notice: 'We are currently TESTING this application. If you have any questions, please contact us. Please note: Meter reads may be blocked for short periods of time due to technical issues. Meter reads will continue to report at various intervals using estimates based on historical data.' A red arrow points to the 'Settings' option in the left-hand navigation menu, and another red arrow points to the 'Contact Methods' sub-option. Below the navigation menu, a 'Combined Usage Report - Electric - Past 30 Days' chart is visible, showing KWH usage (blue bars) and Rock Hill Temperature (F) (yellow line) from April 3 to May 8, 2020. The chart shows a clear correlation between temperature and electricity usage, with higher temperatures corresponding to higher KWH values.

Date	KWH (Approximate)	Rock Hill Temperature (F) (Approximate)
Apr 3	4500	65
Apr 4	4800	68
Apr 5	4500	70
Apr 6	4200	72
Apr 7	4000	75
Apr 8	4200	78
Apr 9	4000	75
Apr 10	4200	70
Apr 11	4000	65
Apr 12	4200	60
Apr 13	4500	55
Apr 14	4800	50
Apr 15	4500	48
Apr 16	4200	45
Apr 17	4000	45
Apr 18	4200	50
Apr 19	4000	55
Apr 20	4200	60
Apr 21	4000	65
Apr 22	4200	70
Apr 23	4000	75
Apr 24	4200	78
Apr 25	4500	75
Apr 26	4200	70
Apr 27	4000	65
Apr 28	4200	60
Apr 29	4000	55
Apr 30	4200	50
May 1	4000	48
May 2	4200	45
May 3	4500	50
May 4	4800	55
May 5	4500	60
May 6	4200	65
May 7	4000	70
May 8	4200	75

The email used to set up your account will prepopulate as your first Contact Method. If you wish to add an additional email address or a cell phone number for text notifications, click the **+Add** button.

ROCK HILL SOUTH CAROLINA Always on

Meters 3 Locations 1

LCox [redacted] Logout

Contact Methods

Delete Selected Contact Methods

CSV PDF 1 result

	Name	Details
	Registration Email	laura.cox@cityofrockhill.com

My Dashboard
Library
Reports
Settings
Thresholds
Contact Methods
Notifications
Markers
Virtual Meters
Meter Groups
Meter Indexes
Meter Names
Accounts

A window will appear to add another contact method. Type in the name of the contact in the space provided and then select the method type. Since there's already an email contact, we'll select the SMS type for a text contact. Once you select SMS, options will appear to enter your cell phone number and to select your cell phone carrier. When you've entered all selections, click the green **Save** button.

Add Contact Method

* Name

Type

* Phone Number

* Cellular Service Provider

Now, both contact methods appear. You can continue to add contact methods so multiple people will receive any notifications you set.

Contact Methods			
Delete Selected Contact Methods			
CSV PDF			1 result
	+ Add	Name	Details
		Registration Email	laura.cox@cityofrockhill.com
		Laura Cox	(803) [REDACTED]

Next, we'll learn how to set Thresholds.

Thresholds are target usage levels that you set based on what makes sense for your company. To set these so the system will monitor for you, click **Thresholds**, also on the **Settings** menu.

At this time, there are no Thresholds set. To set a Threshold, click the **+Add** button.

	Threshold Name	Meter Name	Channel Name	Period	Target
No results found					

A window appears with all the options for setting a **Threshold**.

First, **Name** it.

The **Description** field is optional.

You can set the **Period** for **Daily**, **Weekly** or **Monthly**.

Next, use the magnifying glass to choose the **Meter** you want. Then select the **Channel Name** to signify which data should be monitored.

Next to **Target**, you can select whether you want the data to be **Above** or **Below** the target you set. Then enter the targeted amount for your Threshold.

In this example, we have set a daily, electric Threshold for kilowatt hours that rise above 5000.

When you have finished making your choices, click the green **Save** button.

Add Threshold

*Name: Electric

Description: [Empty]

Period: Daily

*Meter: BLVD - Meter: 76981847 (Electric) Location: 3019054

Channel Name: KWH

*Target: Above 5000 KWH

Save Cancel

Your set threshold now appears.

You can set additional thresholds for different meters by clicking the green **+Add** button.

The small icons next to the existing threshold help to easily manage it.

Clicking the green icon shaped like a pencil will allow you to edit the threshold to change amount, time period or channel.

Clicking the blue icon with two arrows will allow you to clone this threshold. That allows you to easily set additional thresholds for the same meter but changing other options like channel name or target.

Clicking the red icon of a trash can will delete the Threshold entirely.

Thresholds						
Delete Selected Thresholds						
CSV PDF 1 result						
	+ Add	Threshold Name	Meter Name	Channel Name	Period	Target
  		Electric	 Meter: 76981847 (Electric) Location: 3019054	KWH	Daily	Above 5000 KWH

Now let's set up a notification for when the threshold is met. 

Setting Notifications will enable the application to send you email or text messages when your water or electric consumption reaches a previously set threshold. On the **Settings**, menu, click **Notifications**.

The screenshot displays the Rock Hill South Carolina utility portal. The top left features the logo and the slogan "Always on". Navigation buttons for "Meters 3" and "Locations 1" are visible. The left sidebar menu includes "My Dashboard", "Library", "Reports", "Settings", and "Thresholds". The "Settings" and "Notifications" items are highlighted with red arrows. The main content area is titled "Thresholds" and contains a table with one entry:

	Threshold Name	Meter Name	Channel Name
Electric	- Meter: 76981847 (Electric) Location: 3019054	KWH	

The **Notifications** screen appears.

Make sure you have the proper **Time Zone** selected. It prepopulates for Eastern Standard Time and is set to recognize Daylight Savings Time.

Your primary **Contact Method** is listed, but you can add an additional **Contact Method** by clicking the green **+Add Contact Method** button. You will only be able to add an additional Contact Method if it was set up in the first example of this tutorial.

There are no **Notifications** set yet. To set up a **Notification**, click the green **+Add** button.

Notifications

▼ General Settings

Time Zone: UTC-05:00 Eastern Time
 Observes Daylight Savings Time

Receive General Notifications at: Registration Email: laura.cox@cityofrockhill.com
+Add Contact Method

Delete Selected Notification

CSV PDF **0 results**

+ Add	Name	Contact Methods	Notification Type
No results found			

The **Add Notifications** window appears with all the options needed to set up a notification.

Select **Notification Type** from options Usage Threshold Summary, Interval Threshold or Events.

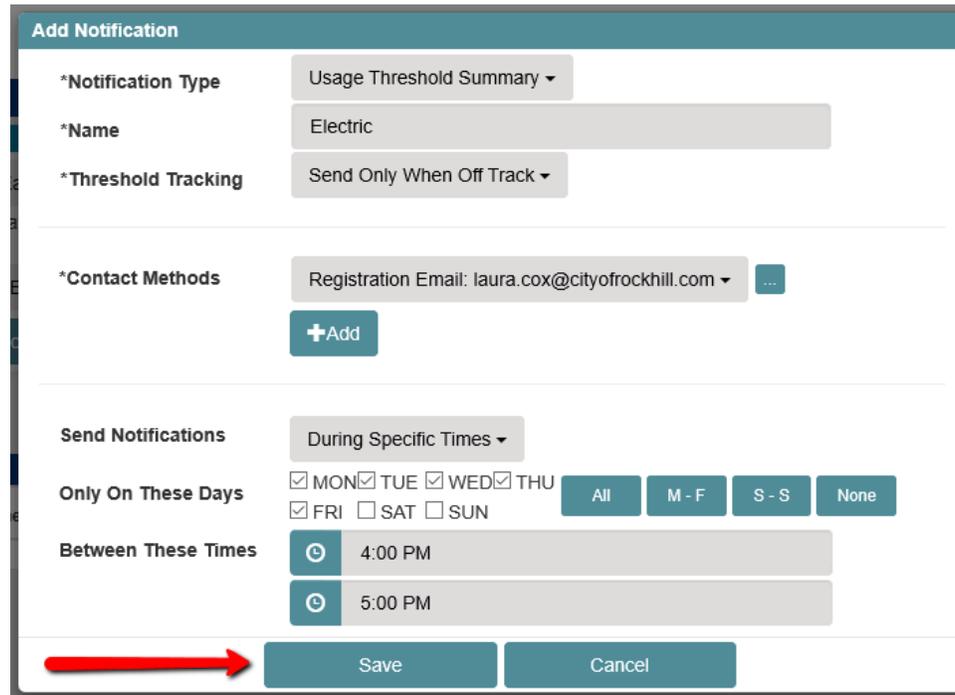
For consistency, you may want to **Name** the notification, the same name you gave the threshold.

Make a **Threshold Tracking** selection from options Send Only When Off Track or Always Send Daily Notification.

Select your **Contact Method**. Your only options are the Contact Methods you added in the previous step.

Next, for **Send Notifications**, you can opt to have your notification sent Anytime or During Specific Times. For this example, we selected During Specific Times. You can get very specific with one or more days of the week and a specific time during those days.

Once you've made all selections and set up the notification you want, click the green **Save** button.



The screenshot shows the 'Add Notification' window with the following configuration:

- *Notification Type:** Usage Threshold Summary
- *Name:** Electric
- *Threshold Tracking:** Send Only When Off Track
- *Contact Methods:** Registration Email: laura.cox@cityofrockhill.com (with a '+Add' button below)
- Send Notifications:** During Specific Times
- Only On These Days:** MON, TUE, WED, THU, FRI (checked); SAT, SUN (unchecked). Buttons for 'All', 'M - F', 'S - S', and 'None' are also present.
- Between These Times:** 4:00 PM to 5:00 PM

A red arrow points to the **Save** button at the bottom of the window.

Your notification is now listed.

As with setting a threshold, the small icons next to the notification help to manage it.

Clicking the green pencil icon allows you to edit the notification in any way.

Clicking the blue icon with two arrows will allow you to clone this notification so you can tweak it and save it as an additional notification.

Clicking the red icon of a trash can will delete the Threshold entirely.

Please note: A single notification will alert you when any or all thresholds have exceeded or fallen below the criteria you set. Additional notifications are necessary in order to select different notification types, tracking or notification times.

Notifications ?

General Settings

Time Zone: UTC-05:00 Eastern Time Observes Daylight Savings Time

Receive General Notifications at: Registration Email: laura.cox@cityofrockhill.com

1 result

	Name	Contact Methods	Notification Type
  	Electric	Registration Email	Usage Threshold Summary