Mastering Custom Fields, Groups and Filters

CATALYSTA
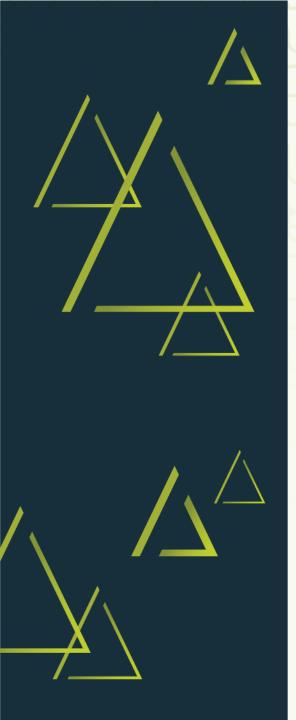
Today's ground rules

Lectures are boring – **discussions** are WAY better!

Ask questions

Help each other – share your experiences and ideas

Participate and **provide feedback**!

Mastering Custom Fields, Groups and Filters

- Maximizing the value of Custom Fields

- Creating and Managing Groups

- Using Groups throughout EnergyCAP

- The "Art" of Filters

Custom Fields

Make your EnergyCAP database your own!

- Available on multiple objects: buildings, meters, accounts, vendors, rate schedules, channels

Unlimited number available

Lots of data types to choose from

Don't forget about Advanced Custom Fields

Demo: Custom Fields

But wait, there's more...

Even More You Can Do With Custom Fields

Reports

- Available to export with your data

Manage with Setup Spreadsheets

Use as filters?

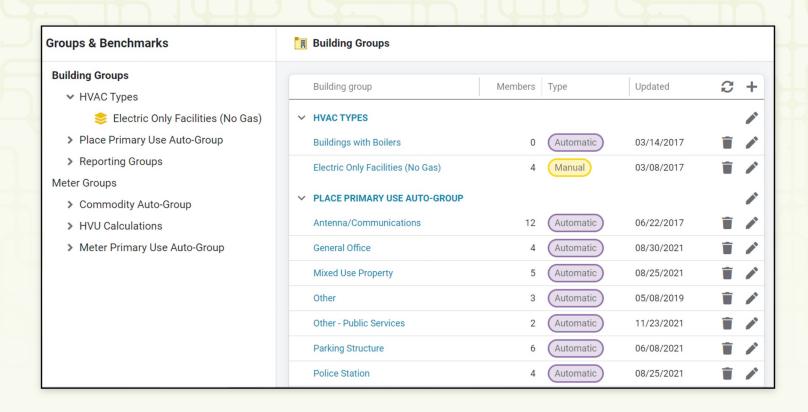**Use for groups?**

EnergyCAP Groups

Groups help you compare like buildings or meters.

Create your own groups based on attributes important to you.

You can use groups as a filter in dashboards, reports, and bill lists.

Benefits of Groups

Most reports have the filter for building and meter groups.

This has two benefits:

- You can create your own custom groups.

- No need to rely on the tree structure for reporting.

Two Types of Groups

Automatic groups – EnergyCAP automatically assigns membership based on criteria set by user.

Manual groups – You can select the members of the group individually, one-by-one.

Building group	Members	Type
City Buildings SQFT > 20000	24	Automatic
Emissions Tracking	32	Manual

Demo: Creating Groups

Value of Groups

Report filters

Dashboard filters

Dynamically filter dashboards
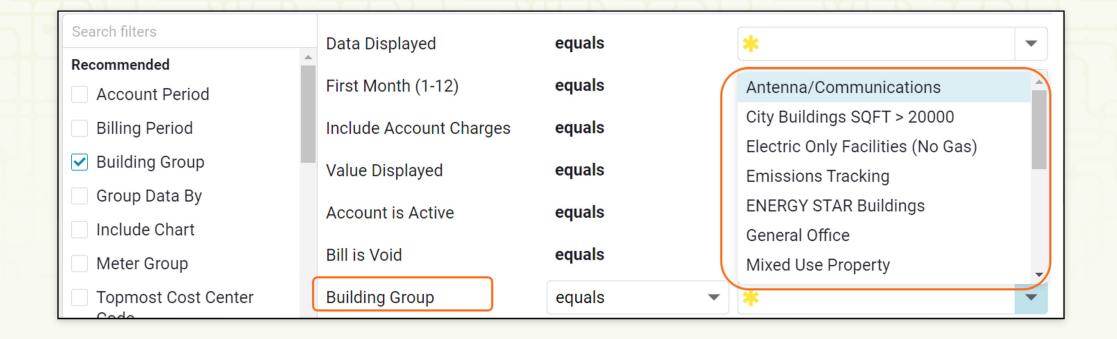
Filters

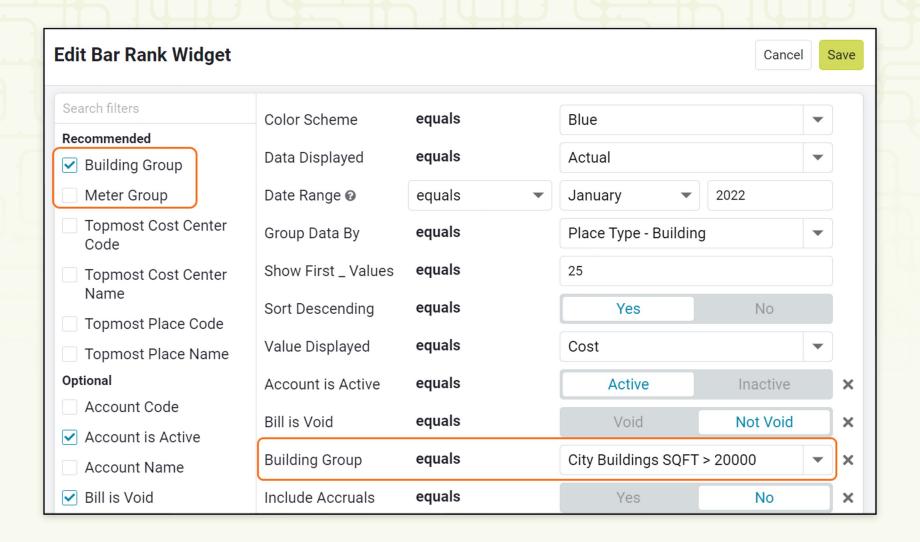Mastering filters can save you a lot of time and help you master your data

Filters available:

- Reports

- Dashboards

- Bill Lists

- Groups

Report Filters – Report 1

Widget Filters

Edit Bar Rank Widget   Cancel   Save

Search filters

Recommended

- ☑ Building Group
- ☐ Meter Group
- ☐ Topmost Cost Center Code
- ☐ Topmost Cost Center Name
- ☐ Topmost Place Code
- ☐ Topmost Place Name

Optional

- ☐ Account Code
- ☑ Account is Active
- ☐ Account Name
- ☑ Bill is Void

Color Scheme	**equals**	Blue
Data Displayed	**equals**	Actual
Date Range ⊙	**equals**	January 2022
Group Data By	**equals**	Place Type - Building
Show First _ Values	**equals**	25
Sort Descending	**equals**	Yes / No
Value Displayed	**equals**	Cost
Account is Active	**equals**	Active / Inactive
Bill is Void	**equals**	Void / Not Void
Building Group	**equals**	City Buildings SQFT > 20000
Include Accruals	**equals**	Yes / No

Demo: EnergyCAP Filters

Questions?

Session Survey

conferences.energycap.com/surveys