

How do I enter utility bill data?

CATALYST 





Session Agenda

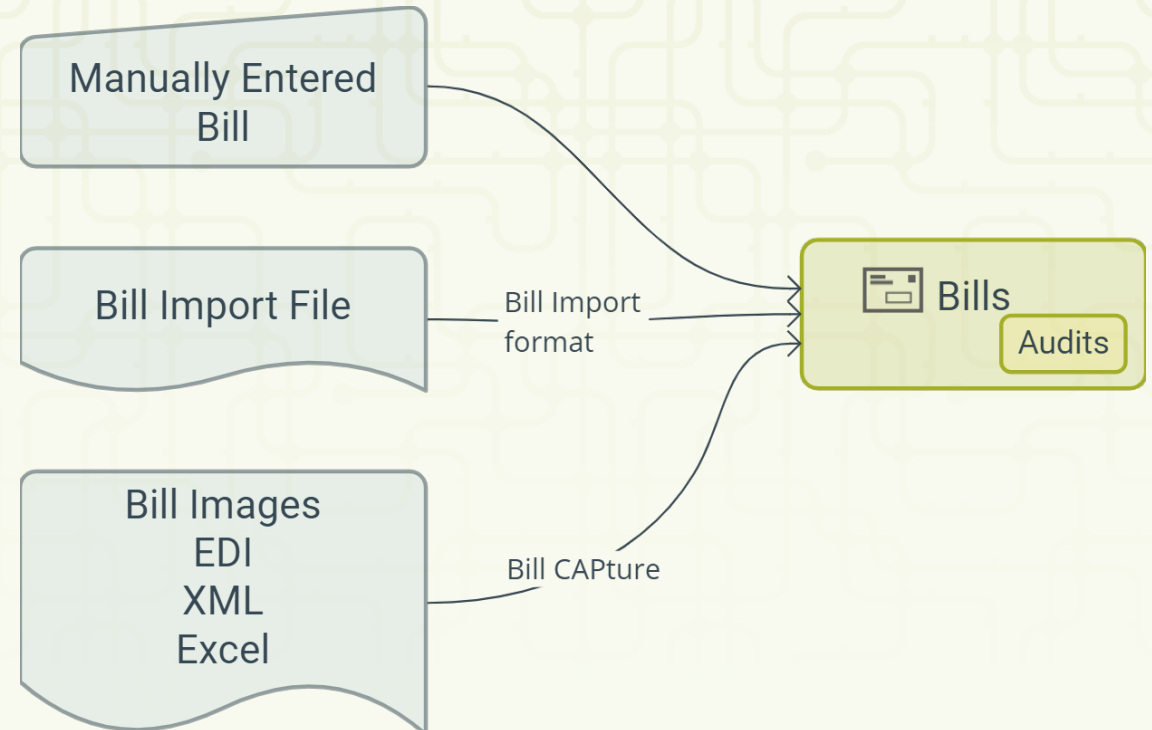
How utility bill data is entered into EnergyCAP

- Manual bill entry
- Bill import
 - Bill import formats
 - Bill import log
- Bill CAPture
- Q&A
- Survey

Enter Utility Bill Data

You can enter utility bill data in a variety of ways.

- Enter **manually** one by one.
- With a **bill import** file.
- Subscribe to our **Bill CAPture** service.



Manual Bill Entry

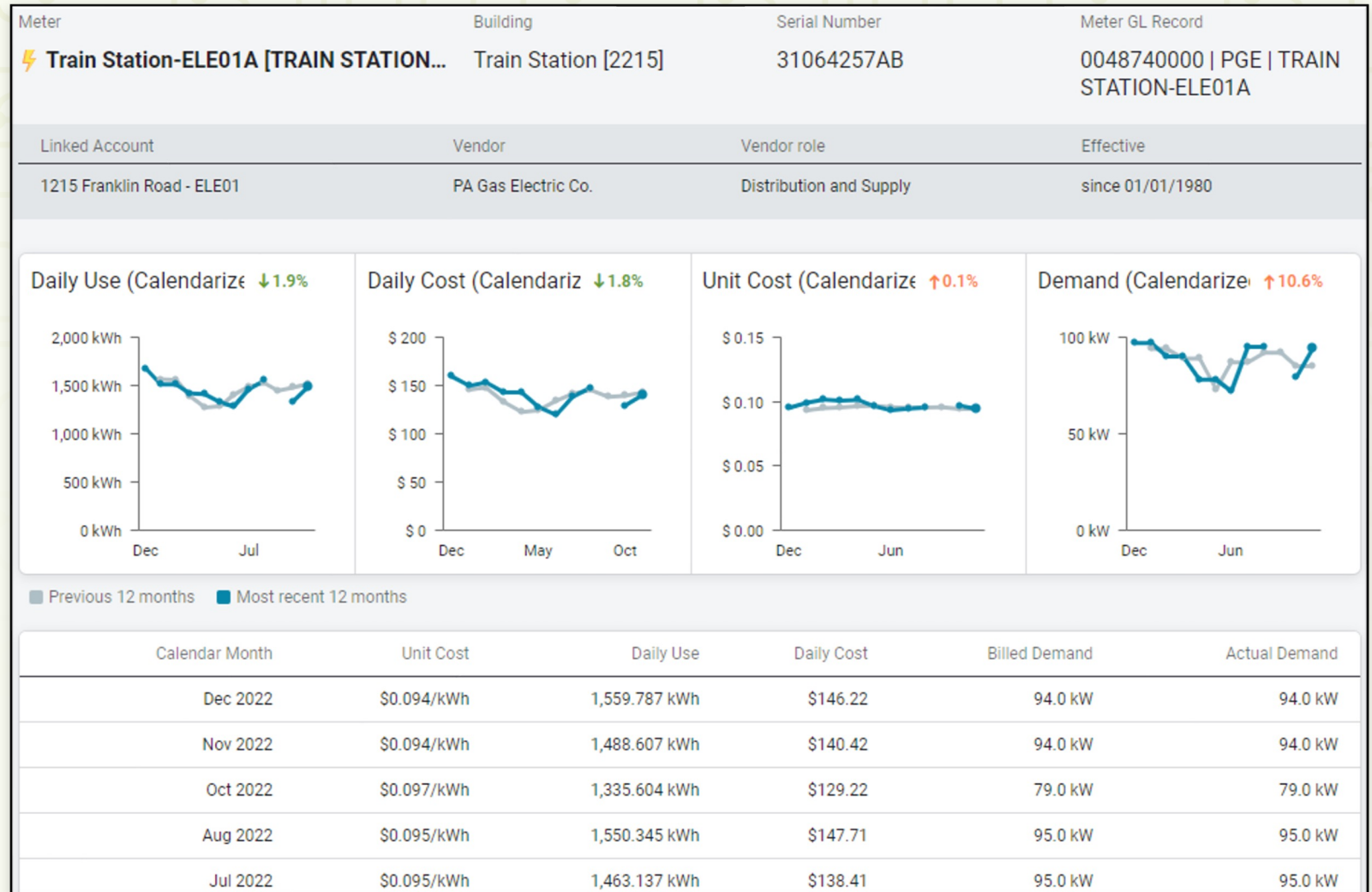
There are many places you can start to manually enter a bill.

1. While viewing a bill list.
2. With the Create button.
3. On the meter or account. (no need to search!)



Bill History Pop-out

Easy to see the history of a specific meter, updates as you move through the billing periods.



Manual Bill Entry

Hands-on exercise

1. Choose a method to manually enter a new bill (Create Button, Bill List, Account, or Meter)
 - If using the Create Button or Bill List, search for the account.
2. If you don't have an open **batch** you are prompted to open one or pick a pending batch.
3. Enter the end date or the number of billing days.
 - The start date of your new bill is the end date of the previous bill.
4. Enter required bill header information.
5. Enter bill details.
6. Save.

Bill Import

With bill import you can import multiple bills at one time.

- Create your own format that matches your file and use it each month.
- Advanced file format requires specific column headers to import data.

Edit Bill Import Format

CancelSave

Name

1900 Electric

Date format

mm/dd/yyyy

Bill header information

Import file column

Account number

Start

End

Commodity

Meter code

Column A

Column D

Column E

Column C

Column B

Bill line type

Label

Units

Use

Usage

kWh

Column I

Charge

Cost

\$

Column L

Bill Import Steps

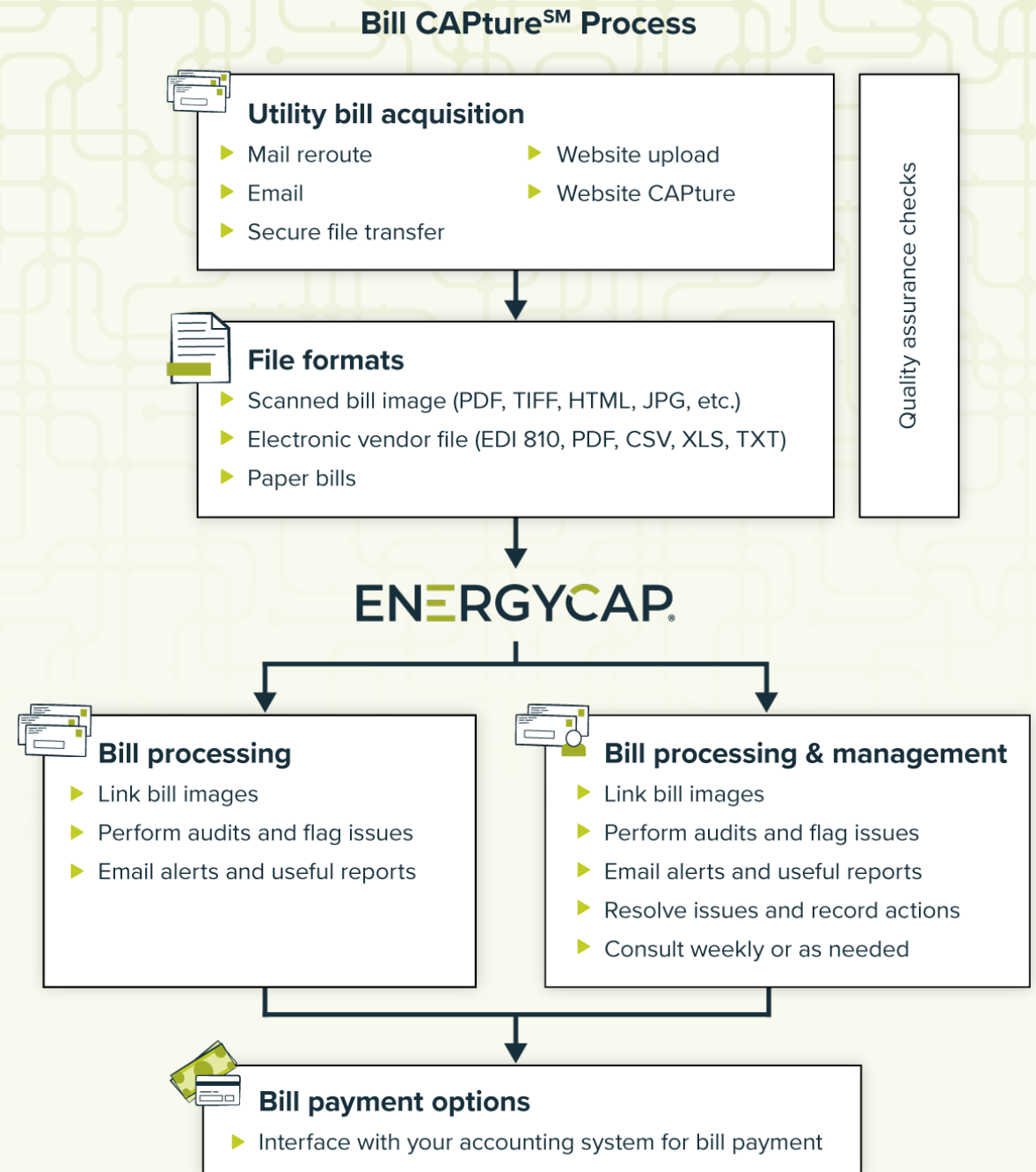
1. Create the bill import format.
2. Import your file.
*Remember to prepare your file following the criteria in the Help Center.
3. Review the import log and check for errors.
4. Download any errors, fix, and upload the error file. Repeat this step as needed.

Bill CAPture

Bill CAPture is a service that manages importing your bills for you.

- You can scan the bills and upload them to Bill CAPture.
- You can redirect your bills to our processing center.
- Use spreadsheets you get from your vendor.

Bill CAPture also offers **managed services** to help your staff resolve billing and account related issues.



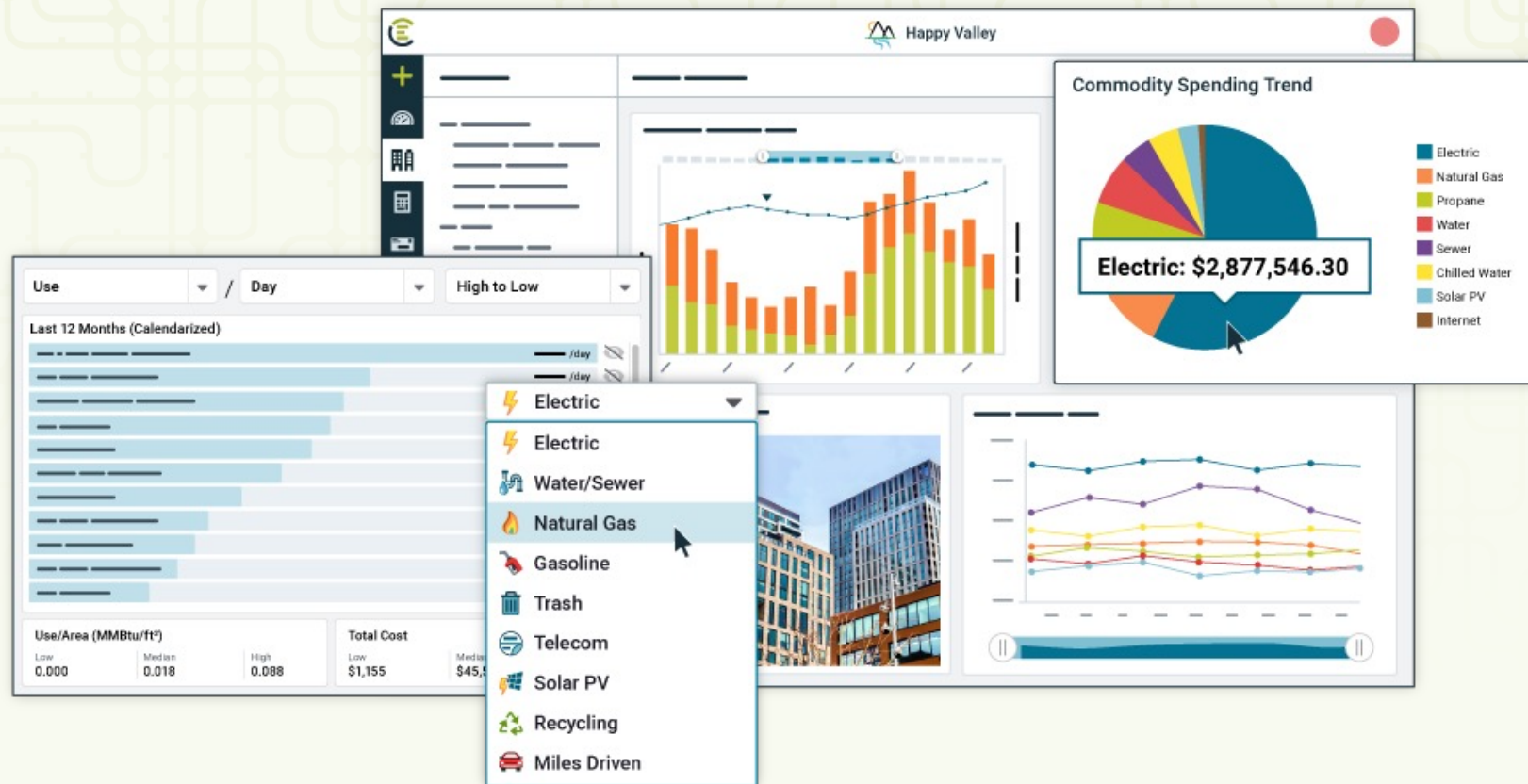
Bill CAPture

The Bill CAPture process:

1. You **collect** your utility bills for an entire month.
2. **Scan** all your paper bills and create a pdf file.
3. **Upload** your bills to Bill CAPture.
4. During **enrollment**, the processing center maps the bills according to your rules. This lets OCR transform the bills into an electronic file.
5. The setup is **validated**.
6. **Live** processing can start!

Managed services is an additional option that can help you resolve billing and account-related issues.

Wrap up



Questions?

Session Survey

conferences.energycap.com/surveys

