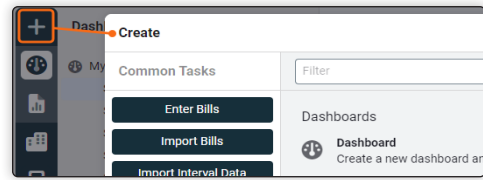


# Getting Started

## Create Button

Quick access to manual bill entry, importing files, and creating common EnergyCAP objects.



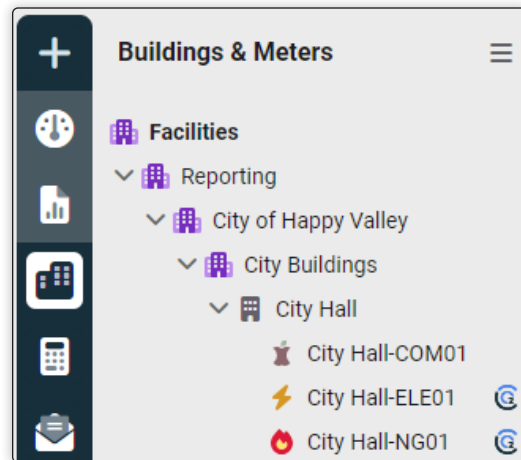
## Meters

Meters track the use and cost of a commodity and as a best practice are attached to buildings.

## Organizations and buildings

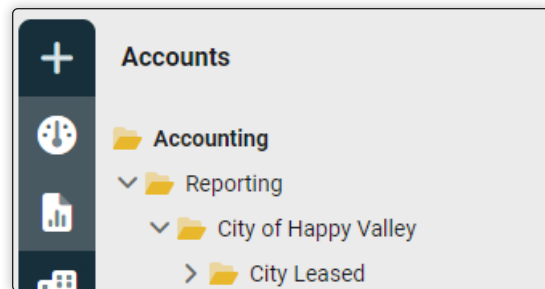
Group your buildings with organizations and view cost, use, and trends at various levels. Create multiple levels by adding organizations under organizations.

Assigning one or more topmost places (organizations) to a user restricts their access to a subset of the tree.



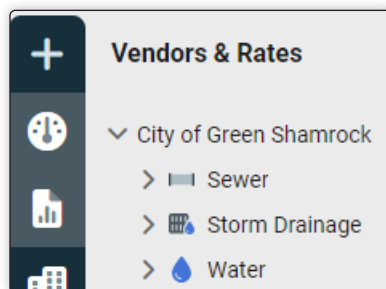
## Accounts and cost centers

Cost centers group your accounts to match your organization's Accounting structure. The account number is on the utility bill.



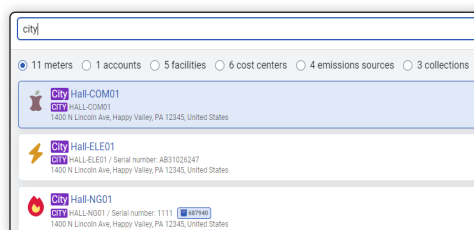
## Vendors and rate schedules

Vendors are associated with accounts. Each vendor can have multiple rate schedules. Assign one rate schedule to each meter.



## Search

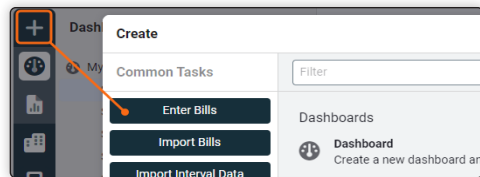
The quickest method to find an object is often through Search. Use it to find organizations, buildings, meters, and accounts.



# Getting Started | Enter a bill

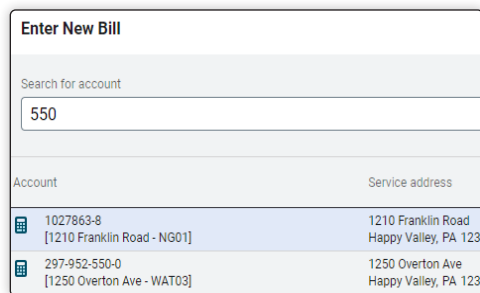
## Create Button

Click **Create** and select **Enter Bills**.



## Search for the account

Search for the account number or name, meter code, meter name, address, or meter serial number. To select an account, click anywhere on the row or use the arrow and Enter key.



## Enter bill data

Move through the bill entry screen with the Tab or Enter key.

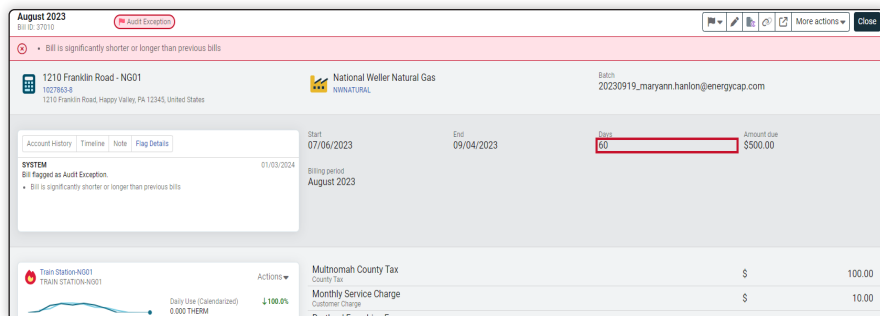
Start: 07/06/2023 | End: \* MM/DD/YYYY | Days: \* | Amount due: \* \$

Billing period: \* Month | Due date: \* MM/DD/YYYY | Statement date: MM/DD/YYYY | Control code: [ ]

Invoice number: [ ] |  Estimated

## Bill audits

Bill audits are powerful tools for data validation and examine utility bill data for accuracy and unusual patterns of use or cost. Bill audits run immediately after bills are saved and provide important feedback.



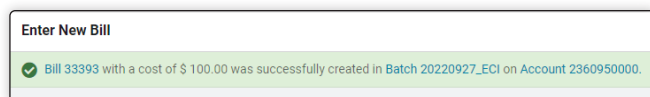
## Error when saving a bill

If the amount due doesn't equal the total cost of the bill, a banner message appears and the bill is not saved.

**⚠** The provided Amount Due is \$100.00 less than the Total Cost of all bill lines. Add or edit lines to balance the bill.

## Bill entry confirmation

Successful bill entry message.



# Getting Started | Create a bill list

## Bills module

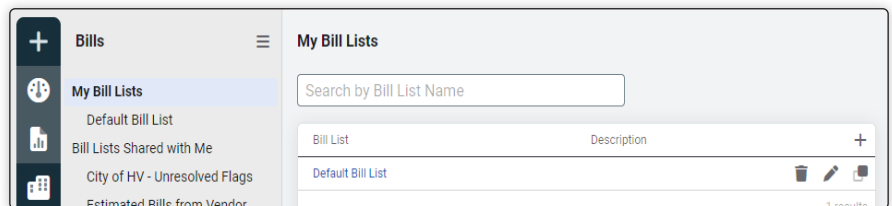
Manage, search, and import bills with **bill lists**.

## Bill lists

Bill lists are a set of configured and saved filters that result in a subset of bills. You can create, copy, and share bill lists on the Bills module page.

## Add a new bill list

In the Bills module, click **My Bill Lists** and then the + to add a new bill list.

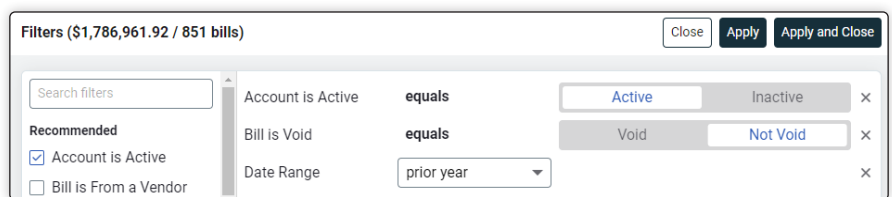


## Manage filters

The number indicates how many filters are applied.

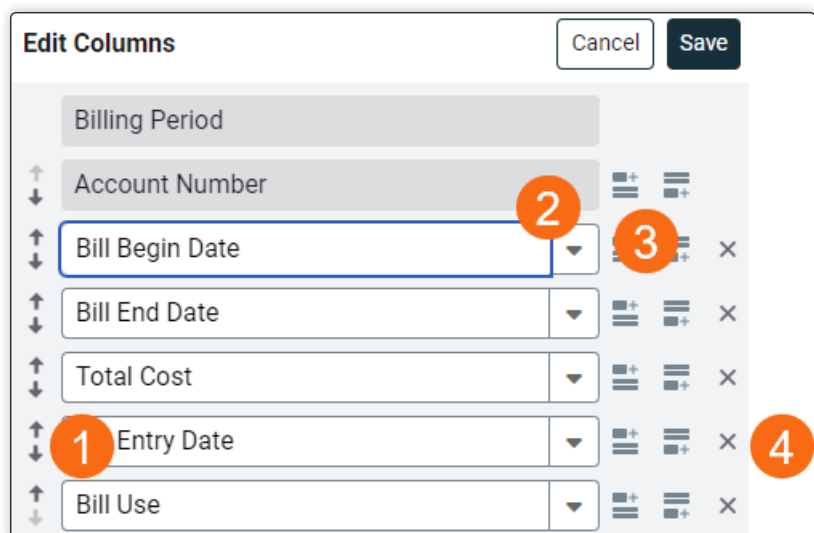
Recommended filters are listed first, and optional filters are in alphabetical order.

Click **Apply** to see the results of your filter selections and continue to manage the filters. Click **Apply and Close** when you are finished.



## Add, remove, or reorder columns

1. Change the order of the columns.
2. Change the data field.
3. Add a column.
4. Delete a column.

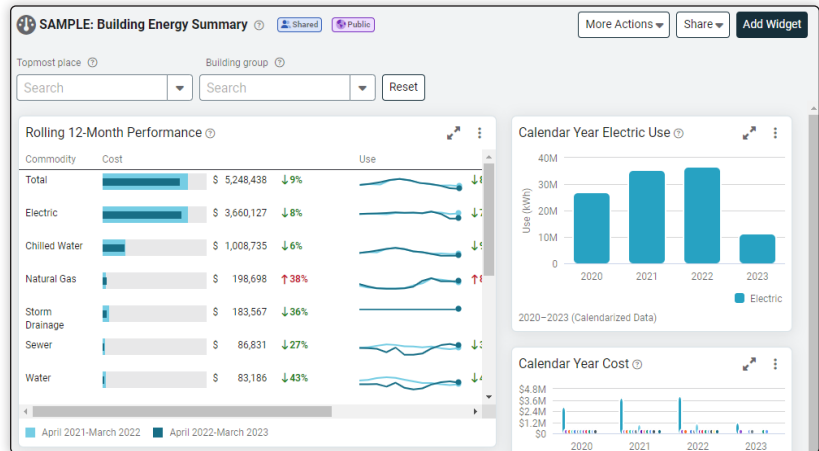


# Getting Started | Dashboards

## Dashboards

Dashboards provide visual insight into your data, displaying key data points.

You can create and customize different dashboards for departments and divisions



## Public Dashboards

It's easy to embed public dashboards and maps in other websites or share them with a direct link.

Public access settings let you customize how the dashboard is displayed to meet your specific needs.

**Public Access Settings** [Cancel] [Save]

GLOBAL DASHBOARD FILTER ?

Show global dashboard filter

Set global dashboard filter to...

Hide global dashboard filter

DASHBOARD INFORMATION

Show dashboard title and description [Show] [Hide]

LINKS ?

Enable links to application [Enable] [Disable]

## Maps

Maps are a convenient way to quickly locate your facilities.

Hover over a building and view high-level performance metrics.

Just like dashboards you can share maps with user groups or the public.

