



Setting Up Objects in EnergyCAP



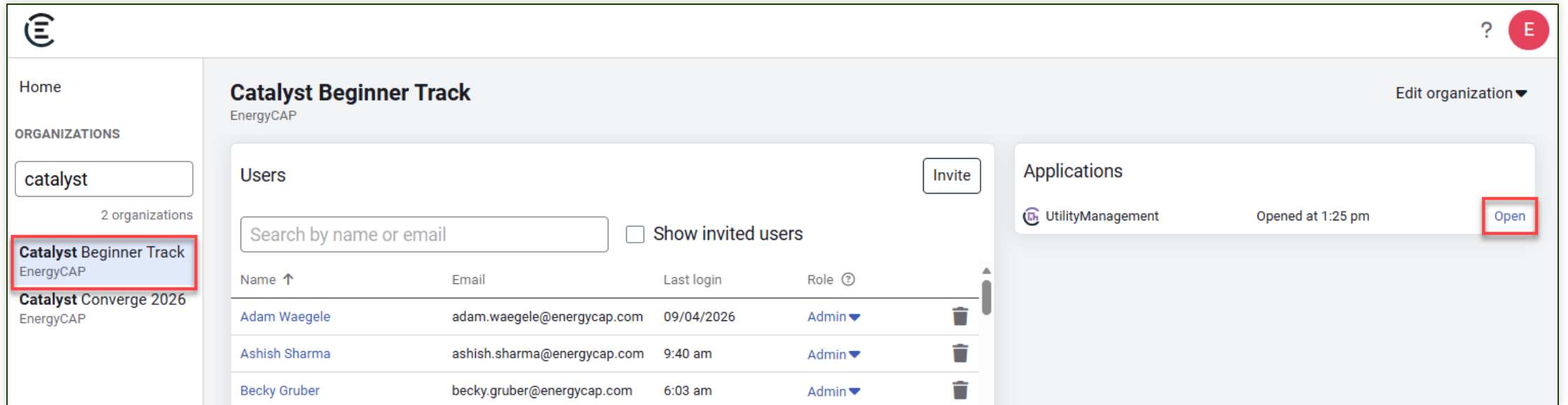
Ellen Peck

Manager, Projects & Enrollments, EnergyCAP

Housekeeping

For this session:

- Navigate to EnergyCAP Home: **<https://login.energycap.com>**
- Open the database: Catalyst Beginner Track



The screenshot displays the EnergyCAP Catalyst Beginner Track interface. The sidebar on the left shows the 'Catalyst Beginner Track' organization selected. The main area is titled 'Catalyst Beginner Track' and contains a 'Users' section with a table of active users. The 'Applications' section on the right shows the 'UtilityManagement' application, which is highlighted with a red box and an 'Open' button.

Name ↑	Email	Last login	Role ?
Adam Waegle	adam.waegle@energycap.com	09/04/2026	Admin ▼
Ashish Sharma	ashish.sharma@energycap.com	9:40 am	Admin ▼
Becky Gruber	becky.gruber@energycap.com	6:03 am	Admin ▼

Agenda



1. What's needed to enter a bill?
2. System overview: Vendor to Meter
3. Object overviews
4. Linking accounts and meters
5. Hands-on practice!
6. Bulk setup with spreadsheets
7. Questions

What's Needed to Enter a Bill?

A lot of objects need to be in place before you can enter utility bill data into EnergyCAP. Think of them in three categories:

- Vendor and Rate Schedule: who bills you, and under what rate
- Cost Center and Account: where the cost gets tracked financially
- Organization, Site, and Meter: where the usage physically happens

Must be in the system to receive a bill:

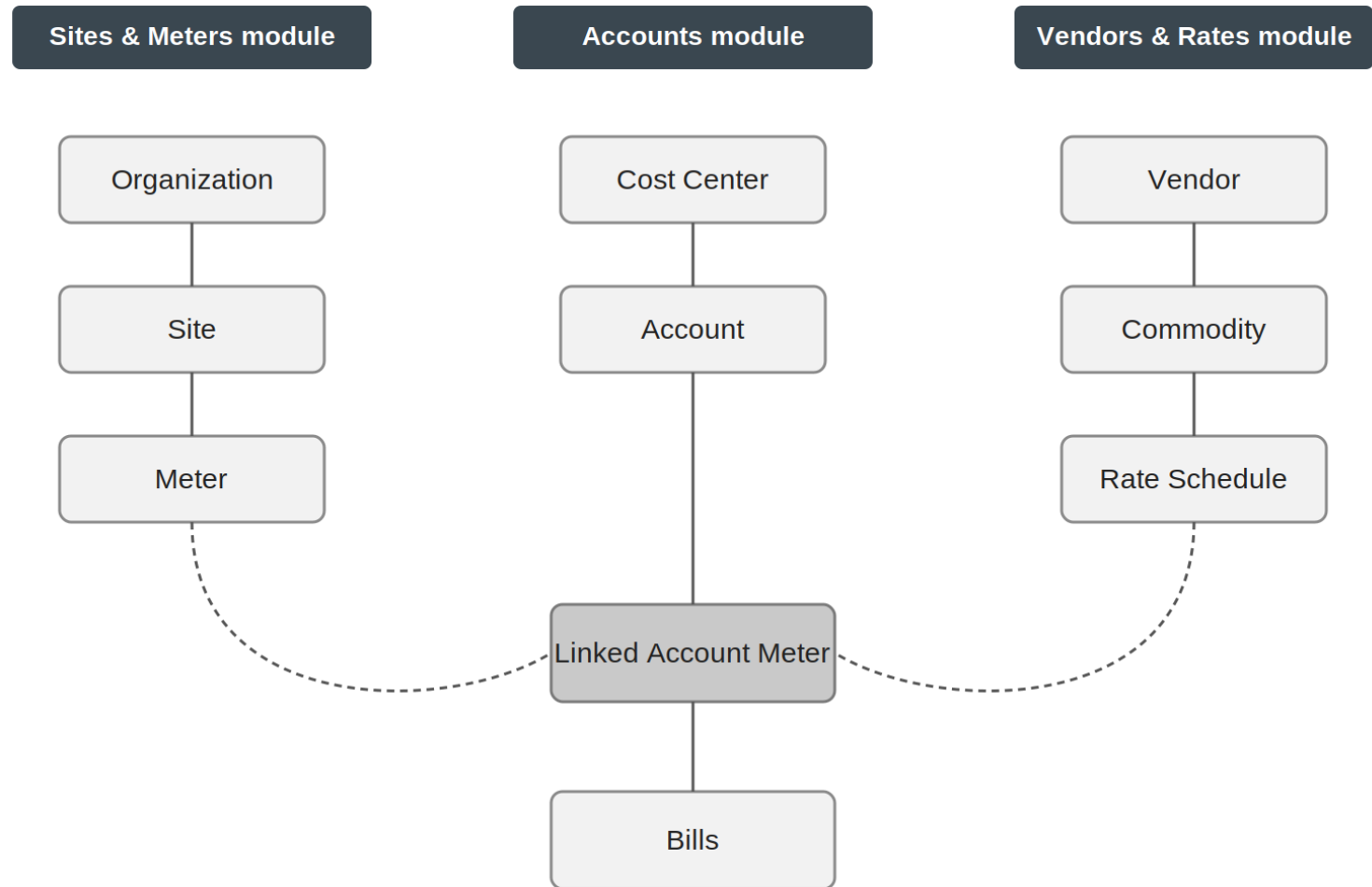
- Vendors, rates, accounts, meters

Nice to have:

- Structure & hierarchy (Organizations, Sites, Cost Centers)

System Overview: Vendor to Meter

Every object you create — site, meter, account, vendor, rate schedule — belongs to its own hierarchy & module, but they all connect at the account-meter relationship.



Vendor & Rate Schedule

The vendor is who sends you the bill. The rate schedule is the pricing structure they bill you under. Every account and meter needs both of these objects created first.



For services, call 1-800-234-2832
M-F: 8am to 5pm
Visit www.yourutilitycompany.com

Service for:
John Customer
123 Main St.
Anytown, PA 12345
555-555-5555

Account Number	1234-56789
Bill Date	01/15/2017
Due Date	02/15/2017
Amount Due	\$49.60

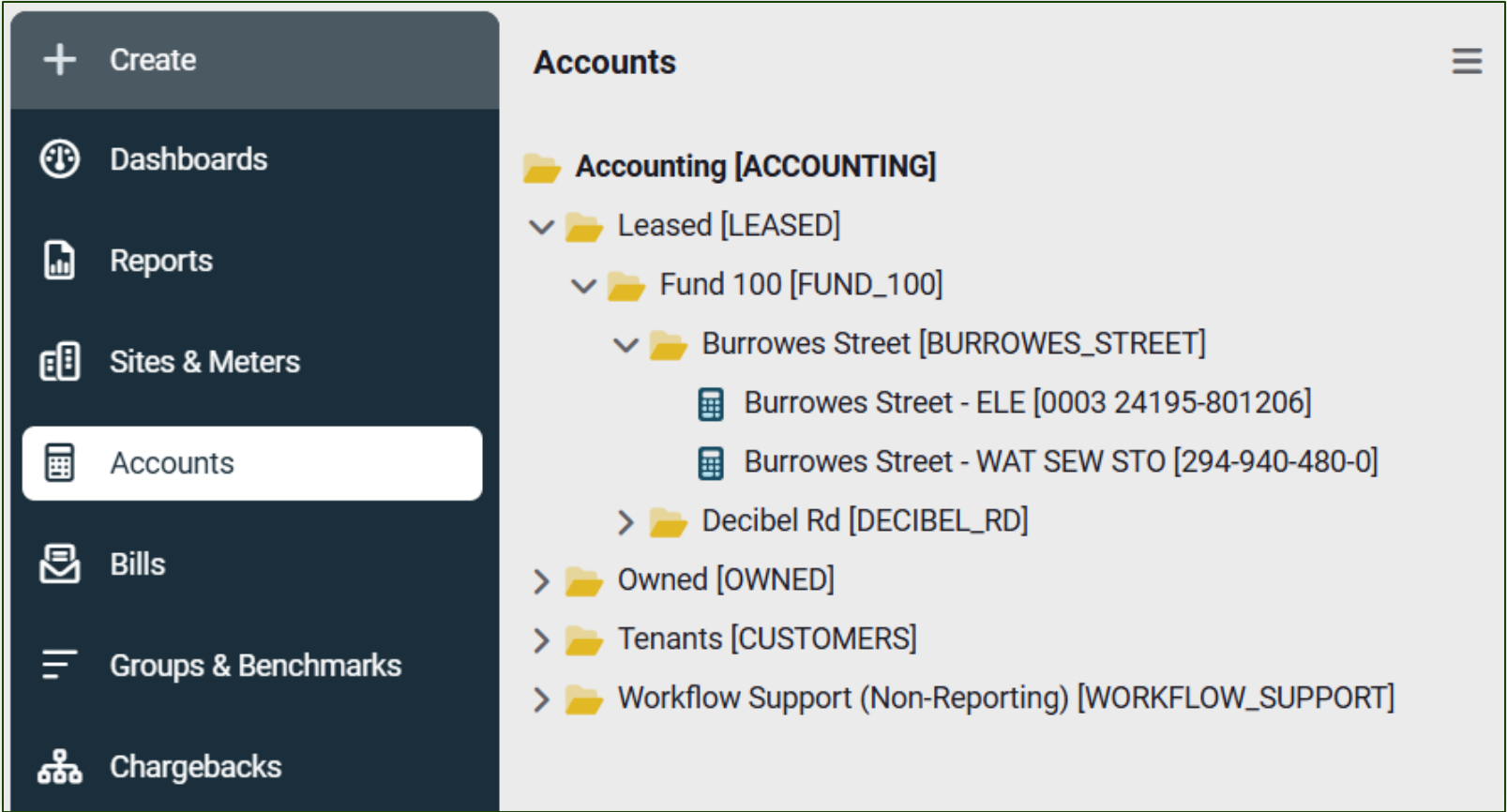
Meter Information

Read Date	Meter Number	Rate	Reading Type	Meter Reading		Difference	Multiplier X	Usage
				Previous	Present			
01/15	22335566778	GS-1	Tot units	4082 Actual	4578 Actual	496	1	496

Service 12/15/2016 to 01/15/2017 - 31 days

Cost Center & Account

The cost center organizes your accounts into folders. You can mirror your site structure, or you can set up a different financial hierarchy. The account receives bills for one or more meters and belongs to a single vendor.



Organization, Site & Meter

Organization

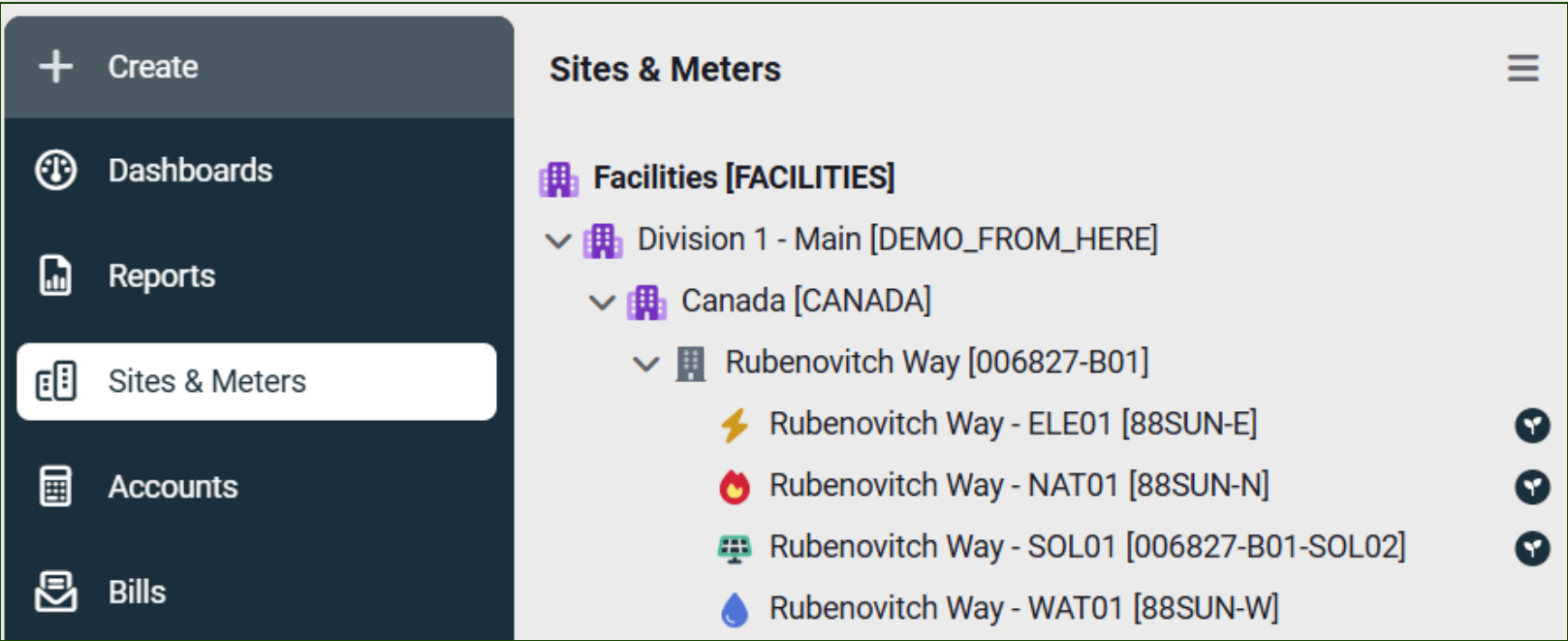
- Groups sites together — departments, campuses, or business units
- Used as a filter and to restrict user access

Site

- A physical structure or logical place; parent of one or more meters
- A zip code, or latitude/longitude place it accurately on the map

Meter

- Tracks the use and cost of a resource
- Best practice: attach it to a site



Linking the Account and Meter

A meter must be linked to an active account before you can record billing data.

[Bills](#) [Billing Period Data](#) [Calendarized Data](#) [Normalized Data](#) [Interval Data \(Legacy\)](#) [Interval Data](#) [Budgets](#) [Savings](#) [Properties](#) [Flags](#)

[Meter](#) [Chargebacks](#)

▼ Linked Accounts - 0

Link at least one account to this meter to enter bill data. Only active meters can receive new bills. Inactive meters may not be displayed depending on your settings.

+ Add Linked Account

Let's Practice!

Hands-On Work:

- ✓ Create a vendor
- ✓ Create a rate schedule
- ✓ Create a cost center
- ✓ Create an account
- ✓ Create an organization
- ✓ Create a site
- ✓ Create a meter
 - Bonus Task: create and link a 2nd to the same account

Additional Areas to Review:

- ✓ Properties Tab
- ✓ Actions dropdown

Bulk Setup with Spreadsheets

Setup spreadsheets save time and let you create multiple items at once. Always download a fresh spreadsheet before you begin — it's pre-populated with your current database. Don't rename, remove, or rearrange columns.

	B	C	D	E	F	G	H
1	New Organization Information			Organization's Description	Parent Information	New Building Information	
2	Organization [code]	Organization Name	Organization Type	Organization Description	Parent Organization [code]	Building [code]	Building Name
	Must be unique - max 32 characters (required for new organizations)	Max 50 characters (required for new organizations)	Select from list (default is Organization)	Max 4000 characters (optional)	Max 32 characters (required for both new organizations and buildings) (Defaults to User's Topmost)	Max 32 characters (required for new buildings)	Max 50 characters (required for new buildings)
3							
4							
5							
6							
7							
8							

Questions?