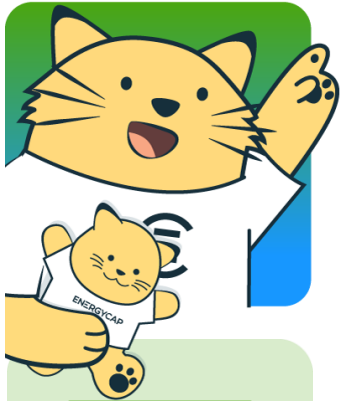




Entering and Managing Bills



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Agenda



1. Three ways to get bills into EnergyCAP
2. Live demo: manual bill entry
3. Historical and bulk entry
4. Managing bills after entry
5. Questions

Three Ways to Get Bills into EnergyCAP



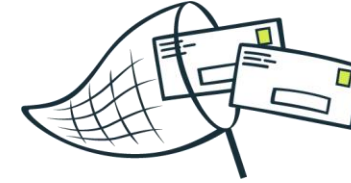
Manual entry

- One bill at a time, full control over every detail
- Best for one-off or low-volume accounts



Bill Import

- Bring in many bills at once with a spreadsheet
- Best for bulk or recurring monthly loads



Bill Capture

- An automated service enters bills for you
- Good fit when staff time is the real bottleneck

Manual Bill Entry

A Few Things to Remember

A handful of details make manual entry smoother once you've got the basics down:

- Every bill belongs to a batch. You can either open a new one or use an existing one
- You can edit a bill to add a line item that isn't on your standard entry format
 - You can save changes for future bills or add a new line as a one-off
- Account-level bill lines cover charges that aren't tied to use or demand
 - These charges won't show when looking at a meter list
- Bill notes flag anything unusual for the next person who opens the bill
- You can upload a scanned image of the bill directly to the record

Bill Import

A great way to enter bills in bulk.

Historical & Bulk Entry

For historical bills or high volume, skip manual entry and use a Bill Import spreadsheet instead.

Create an import format that matches your file and use it for importing each month

Edit Bill Import Format

CancelSave

Name

Date format

1900 Electric

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 Demo

Bill Capture — The Automated Option

If you'd rather not touch manual entry at all, Bill Capture handles it for you.

- Vendor bills are captured, read, and entered on your behalf
- Frees up staff time for review instead of data entry
- Good fit for high bill volume or thin staffing
- Can cover all your bills or just a portion — the rest are set up the standard way
- Lives in the Bills module: upload bills, check upload status, and track usage
- If bill entry is your biggest time sink, this is the option to consider
- A copy of the vendor bill PDF is attached to the EnergyCAP bill

Managing Bills After Entry

Editing bills and reviewing audits

Try this Watts prompt!

Easily find which bills may need your attention



Welcome to Watts AI

Ask me anything about your energy usage, costs, or performance.



Which bills entered in the past week have unresolved flags?

↑ Send

Performance Report

Create a report on energy efficiency over the past 12 months for a specific site or meter.

Top 5 meters by energy cost

Show my top 5 meters by energy cost for the last quarter within a topmost.

Questions?