



A clean bill of health: Smarter Capture, Processing, and Auditing in EnergyCAP

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EnergyCAP

Why this session



Clean utility bill data matters

- Saves you time
- Builds trust with your stakeholders
- Makes your decisions more effective
- Increases your impact
- Enables powerful AI capabilities

Agenda



1. What bill health means
2. Cleaner bills from the start
3. Increased visibility
4. More effective audits
5. Additional Improvements
6. Q&A

What bill health means

Bill Health Means: Complete, Accurate, and Timely Utility Bill Data

Barriers to Bill Health:

- **Bad data** getting in: a corrupt file, a duplicate, a bill landed on the wrong account
- **Problems you cannot see:** a stuck batch with no signal, a bill whose origin nobody can trace
- **Noise hiding real issues:** flags that fire on healthy bills

We attacked these failure modes with product enhancements this year

Cleaner bills from the start: Stopping bad data from getting in

New Product Enhancements:

- Corrupt, password-protected, and unsupported files are **caught at upload**, not silently downstream
- **Problem Files tab** collects everything that is not a usable bill, with bulk actions to clear a batch
- **Duplicate Bill Detection and Review** (matches on account plus cost, dates, or invoice number)
- Duplicates are caught **even when the twin is still in processing**, not only once it is already in your system

Problem Files

Search

+

Create

📊

Dashboards

📄

Reports

📋

Sites & Meters

📅

Accounts

📁

Bills

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Groups & Benchmarks

👥

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📈

Interval Data

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Vendors & Rates

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Bill Lists Shared with Me

My Flag Lists

UPLOAD AND REVIEW

Bill Capture

Bill Imports

RESOLVE AND ORGANIZE

Batches

Batches with Errors

APPROVE AND EXPORT

Bill Export

Not Approved

Held from Export

Waiting for Export to AP

Waiting for Export to GL

Ready for Payment

Accruals Log

Catalyst Converge 2026

5

1

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Bill Capture

Uploads

Problem Files 33

Statistics

Transactions Log

Action Needed

Action Taken History

File Name

Import File Name

Upload date

Uploaded by

Problem Detected

Reset

Contains...

Contains...

Last 60 days

Search users

All

☐ File Name ?	☐ Import File Name ?	Upload Date	Uploaded By	Problem Detected	
☐ H-2177-001-0_20260325...	BillImages_20260908_1...	09/08/2026 1:37 pm	Chris Houdeshell	Duplicate	
☐ H-2177-001-0_20260224...	BillImages_20260908_1...	09/08/2026 1:37 pm	Chris Houdeshell	Duplicate	
☐ H-2177-001-0_20260624...	BillImages_20260908_1...	09/08/2026 1:37 pm	Chris Houdeshell	Duplicate	
☐ H-2177-001-0_20250326...	BillImages_20260908_1...	09/08/2026 1:37 pm	Chris Houdeshell	Duplicate	
☐ H-2177-001-0_20240325...	BillImages_20260908_1...	09/08/2026 1:37 pm	Chris Houdeshell	Duplicate	Actions ▼
☐ H-2177-001-0_20251120...	BillImages_20260908_1...	09/08/2026 1:37 pm	Chris Houdeshell	Duplicate	Actions ▼
☐ H-2177-001-0_20251024...	BillImages_20260908_1...	09/08/2026 1:37 pm	Chris Houdeshell	Duplicate	Actions ▼
☐ H-2177-001-0_20241024...	BillImages_20260908_1...	09/08/2026 1:37 pm	Chris Houdeshell	Duplicate	Actions ▼
☐ H-2177-001-0_20260129...	BillImages_20260908_1...	09/08/2026 1:37 pm	Chris Houdeshell	Duplicate	Actions ▼
☐ H-2177-001-0_20260129...	BillImages_20260908_1...	09/08/2026 1:37 pm	Chris Houdeshell	Duplicate	Actions ▼
☐ H-2177-001-0_20241223...	BillImages_20260908_1...	09/08/2026 1:37 pm	Chris Houdeshell	Duplicate	Actions ▼
☐ H-2177-001-0_20260521...	BillImages_20260908_1...	09/08/2026 1:37 pm	Chris Houdeshell	Duplicate	Actions ▼

All

Duplicate

Password Protected

Corrupt File

File Type Not Supported

Processing Failure

1-33 of 33 results

[Learn about upload best practices](#)

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Duplicate Review

Review Duplicate

Close

Action

Upload in Process

File Name 11304233.pdf

Potential Duplicate Not Processed

File Name 1f181bfd-08dd-da40-9502-0ec44f4f315d.pdf

Account Number 62717 Total Cost - Source 8123.28 Start Date 5/15/2026 End Date 5/21/2026 Invoice Number 11304233

Account Number 62717 Total Cost - Source 8123.28 Start Date 5/15/2026 End Date 5/21/2026 Invoice Number 11304233

< 1 / 11 > | - 100% +

Download

< 1 / 11 > | - 100% +

Download



Account	Stmt ID	Due Date	Amount Due
62717	11304233	Aug 14, 2026	\$8,123.28

Customer Care: (877) 432-4530
retailcustomercare@bp.com

Account Balance

Prior Balance \$14,568.23

Payment(s) \$0.00

Adjustments \$0.00

Outstanding Balance \$14,568.23

Invoice Date: Jul 15, 2026

Payment Due Date: Aug 14, 2026

Invoice Summary

Supply Charges (\$2,833.11)

Settlement Charges (\$3,611.84)

Subtotal (\$6,444.95)

Invoice Total for Period (incl. Tax) (\$6,444.95)

Outstanding Balance \$14,568.23

Late Fee \$0.00

REMIT PAYMENT TO:

bp Energy Retail Company LLC

Bank of America

Bank Routing Number (ABA) - WIRE: 026009593

Bank Routing Number (ABA) - ACH: 111000012



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Increased Visibility

New Product Enhancements:

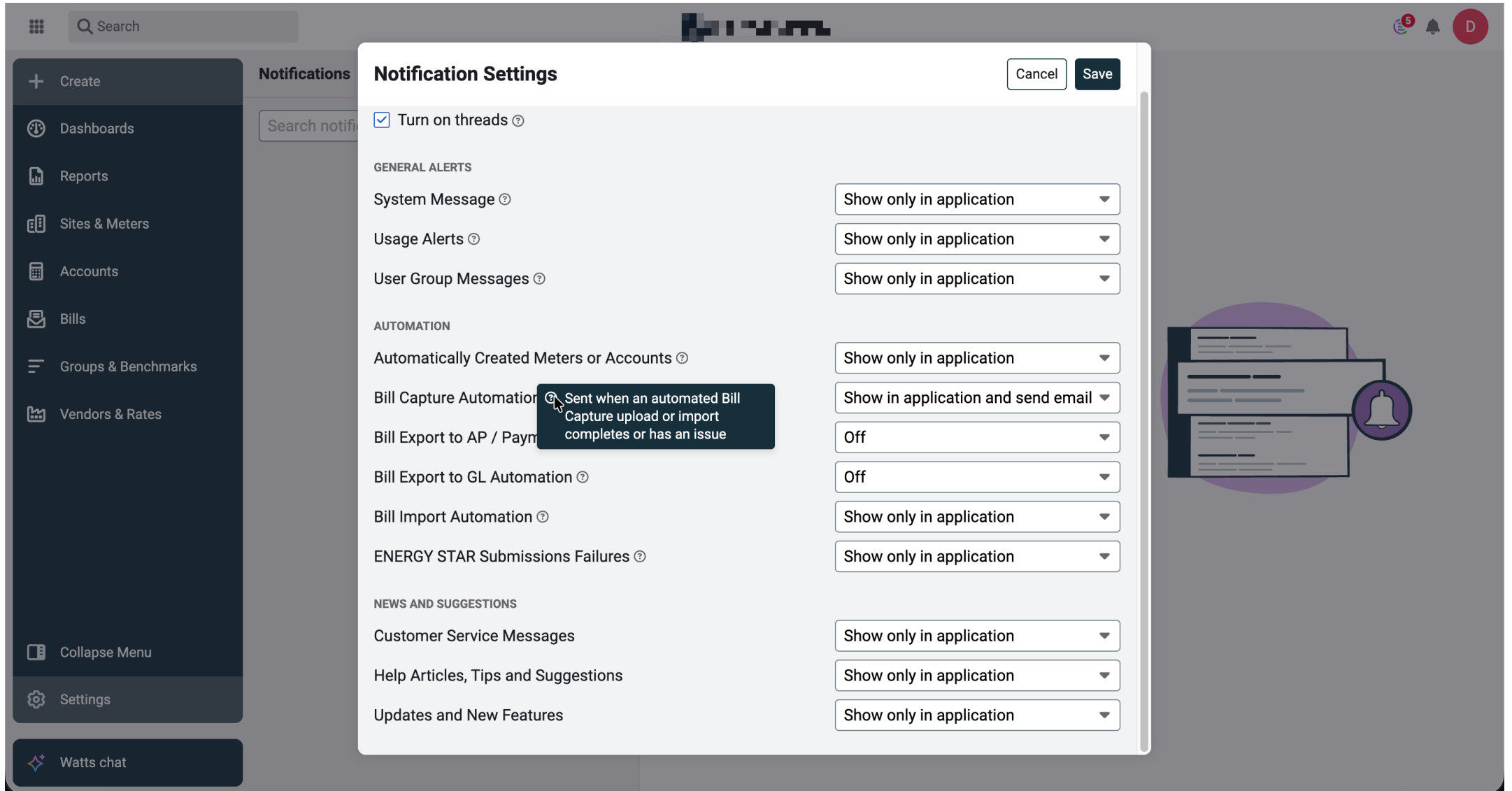
- Upload error **notifications tell you a file failed** without having to go looking for it
- From July, every new bill records **how it arrived and how it was processed**
- The picture fills in going forward, not a full history
- Bill List improvements:
 - Delivery Method column, selected-bills total, currency codes, more forgiving vendor and account search

Retrieval and Processing History ?

Billing Period Aug 2026	Retrieval Method Web Download	Processing Method Bill Processing Legacy
Billing Period Jul 2026	Retrieval Method Web Download	Processing Method Bill Processing Legacy
Billing Period Jun 2026	Retrieval Method No Data Available	Processing Method No Data Available
Billing Period May 2026	Retrieval Method Web Download	Processing Method No Data Available
Billing Period Apr 2026	Retrieval Method No Data Available	Processing Method No Data Available
Billing Period Mar 2026	Retrieval Method Web Download	Processing Method No Data Available

[Learn about retrieval and processing methods](#)

Notifications



Notification Settings [Cancel] [Save]

☒ Turn on threads ⓘ

GENERAL ALERTS

- System Message ⓘ Show only in application ▼
- Usage Alerts ⓘ Show only in application ▼
- User Group Messages ⓘ Show only in application ▼

AUTOMATION

- Automatically Created Meters or Accounts ⓘ Show only in application ▼
- Bill Capture Automation ⓘ
 ⓘ Sent when an automated Bill Capture upload or import completes or has an issue Show in application and send email ▼
- Bill Export to AP / Paym Off ▼
- Bill Export to GL Automation ⓘ Off ▼
- Bill Import Automation ⓘ Show only in application ▼
- ENERGY STAR Submissions Failures ⓘ Show only in application ▼

NEWS AND SUGGESTIONS

- Customer Service Messages Show only in application ▼
- Help Articles, Tips and Suggestions Show only in application ▼
- Updates and New Features Show only in application ▼



Bill list visibility

Search

+

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Batches with Errors

APPROVE AND EXPORT

Bill Export

Not Approved

Held from Export

Waiting for Export to AP

Waiting for Export to GL

Ready for Payment

Accruals Log

Catalyst Converge 2026

51D

Bill List

Actions

Enter New Bill

Void

Batch status

Approved

All Bills

Not filtered

Not filtered

Not filtered

Filters0

\$72,006,633.88 / 18,374 bills

Columns

Sort

☐ Billing Period	Account Number	Processing Method ↓	Retrieval Method	Bill Begin Date	Bill End Date	Total Cost
☒ May 2025	H-2177-001-0	Bill Processing	EC Staff Upload	04/23/2025	05/23/2025	USD \$56.30
☒ Apr 2023	H-2177-001-0	Bill Processing	EC Staff Upload	03/23/2023	04/24/2023	USD \$73.20
☒ Mar 2024	H-2177-001-0	Bill Processing	EC Staff Upload	02/21/2024	03/25/2024	USD \$79.49
☒ Dec 2025	H-2177-001-0	Bill Processing	EC Staff Upload	11/20/2025	12/22/2025	USD \$56.65
☒ Oct 2024	H-2177-001-0	Bill Processing	EC Staff Upload	09/24/2024	10/24/2024	USD \$61.20
☒ Jun 2026	H-2177-001-0	Bill Processing	EC Staff Upload	05/21/2026	06/24/2026	USD \$56.65
☒ Sep 2025	H-2177-001-0	Bill Processing	EC Staff Upload	08/25/2025	09/24/2025	USD \$56.30
☒ Jun 2024	H-2177-001-0	Bill Processing	EC Staff Upload	05/22/2024	06/24/2024	USD \$67.80
☒ Jun 2025	H-2177-001-0	Bill Processing	EC Staff Upload	05/23/2025	06/24/2025	USD \$63.10
☒ Jan 2026	H-2177-001-0	Bill Processing	EC Staff Upload	12/22/2025	01/29/2026	USD \$63.80
☒ Oct 2025	H-2177-001-0	Bill Processing	EC Staff Upload	09/24/2025	10/24/2025	USD \$63.10
☒ Jul 2023	H-2177-001-0	Bill Processing	EC Staff Upload	06/23/2023	07/25/2023	USD \$66.90

12345678910...

1-100 of 18374 bills sorted by Processing Method (descending)

Analyzing

Unresolved

Resolved

Held

Void

Accrual

More Effective Audits

Product Enhancements:

- To reduce unnecessary flag noise, 3 audits are set to Skip by default for **certain** single-commodity accounts at the global level:
 - Gap between bills
 - Overlapping bills
 - Multiple bills in a billing period
- Examples: Oil, Gas, Trash Refuse
- They can be turned on at any time
- Re-running audits no longer reopens work you already resolved
- The save button now asks what you meant: Save, Save and Resolve, and Save and Re-run
- Audits can be set per account, so one noisy account no longer forces a portfolio-wide decision

Notifications

Manage Global Audits

CancelSave

BILL ENTRY

> Duplicate bill

Likely duplicate bill on account

SkipFlagFlag & Hold

> Repeat invoice number

Invoice number is repeated on account

SkipFlagFlag & Hold

☒ Gap between bills

Gap of two or more days between this bill and the preceding bill on the same account. Use Report-17 to find 1-day gaps.

SkipFlagFlag & Hold

Minimum bill total cost

Default issue assignee

Skip accounts that have meters of these commodities ?

\$

Search for one or more users

Gasoline x

x

> Overlapping bill

Bill overlaps with another bill on the same account

SkipFlagFlag & Hold

Search

+

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Emissions

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Accounts

Accounting [ACCOUNTING]

> HEATHER'S COST CTR ...

> Leased [LEASED]

> Owned [OWNED]

> Fund 200 [FUND_200]

> Discovery Drive [...]

> Discovery Dr ...

> Discovery Dri...

> Discovery Dri...

> Discovery Dri...

> Discovery Dri...

> Discovery Dri...

> Happy Valley Ce...

> Radnor Building [...]

> Rubenovitch Wa...

> Sandy Drive [SA...

> Zhu Place [ZHU_...

> Fund 300 [FUND_300]

> Fund 400 - Aux [FUN...

> Fund 500 - E&G [FU...

All Cost Centers

All Accounts

Catalyst Converge 2026

Accounting / Owned / Fund 200 / Discovery Drive

Discovery Drive - FP WAT [H-2177-001-0] Split Account Charges

Bills

Billing Period Data

Properties

Flags

Account

Chargebacks

Linked Meters - 2

Meter	Serial number	Parent location	Rate schedule	Effective	
DISTRIBUTION AND SUPPLY					
> Discovery D...		Discovery Drive Fire Hydrant	since 01/01/1980		
> Discovery D...		Discovery Drive Water	since 01/01/1980		

> Linked Summary or Sub Accounts - 0

Create relationships between accounts with summary and sub accounts. [Get started.](#)

Custom Fields - 0 of 2

Manage Custom Fields

Edit

This account has no custom fields.

Use custom fields to track custom attributes on this account. Click on the Edit button above to populate custom fields for this account.

Use **Edit** to manage the custom field values of this account.

Use **Manage Custom Fields** to globally add or remove custom fields for all accounts.

[Learn more about custom fields](#)

Actions

Reports

Edit Account

Edit Account Number

Manage Audits on this Account

Enter New Bill

Download Account Bills to Excel

360 Discovery Drive, Boalsburg, PA 16827, United States

Vendor

State College Borough Water Authority

Service effective

—

Billing frequency

Monthly

Anticipated bill creation date

10/11/2026

Retrieval and Processing History

Billing Period	Retrieval Method	Processing Method
Jul 2026	EC Staff Upload	No Data Available
Jul 2026	EC Staff Upload	Bill Processing

Additional improvements

Product Enhancements:

- Continual updates to **improve the speed and accuracy of processing**
- Continuous **improvements to processing QA**
- **Bulk PDF** download from any bill list
- **Search by Bill ID or vendor alias**, so you can find a specific bill without knowing where it lives

Bulk PDF Download

Bills

My Bill Lists

Bill List

Bill Lists Shared with Me

My Flag Lists

UPLOAD AND REVIEW

Bill Capture

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Bill Export

Not Approved

Held from Export

Waiting for Export to AP

Waiting for Export to GL

Ready for Payment

Accruals Log

Bill List

Actions

Enter New Bill

Void

Batch status

Approved

All Bills

Not filtered

Not filtered

Not filtered

Filters

\$6,586.56 / 100 selected

Select all 18374 bills

More actions

Downloads

Billing Period	Account Number	Processing Method	Retrieval Method	Bill Import File	Date	Total Cost
May 2025	H-2177-001-0	Bill Processing	EC Staff Upload	PDF of Selected Bills	2025	USD \$56.30
Apr 2023	H-2177-001-0	Bill Processing	EC Staff Upload		03/23/2023 04/24/2023	USD \$73.20
Mar 2024	H-2177-001-0	Bill Processing	EC Staff Upload		02/21/2024 03/25/2024	USD \$79.49
Dec 2025	H-2177-001-0	Bill Processing	EC Staff Upload		11/20/2025 12/22/2025	USD \$56.65
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1 2 3 4 5 6 7 8 9 10 ...

1-100 of 18374 bills sorted by Processing Method (descending)

Questions?