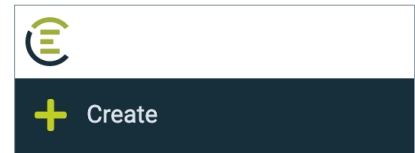


Create Button

Conveniently start tasks, create objects, and enter bills in one place. Your user role determines what options are visible.



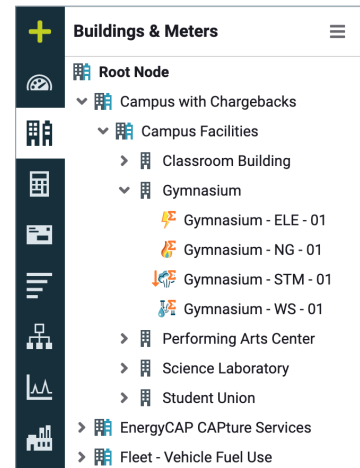
Meters

Track the use and/or cost of a commodity. Meters are normally attached to buildings.

Assigning a topmost place (organization) to a user restricts their access to a subset of the tree.

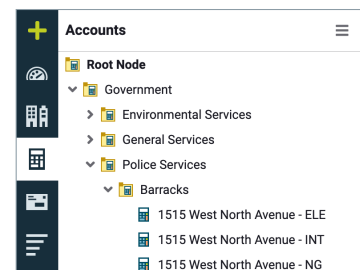
Organizations & Buildings

Organizations allow you to group buildings and view cost, use, and trends at various levels in the tree. Multiple levels can be created by adding organizations under organizations. Assigning a topmost place (organization) to a user restricts their access to a subset of the tree.



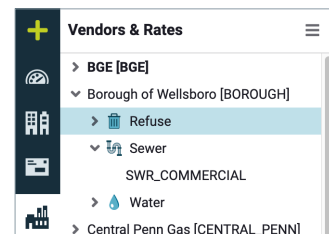
Accounts & Cost Centers

Cost centers allow you to group accounts and typically follow your Accounting structure. The account number is on the utility bill.



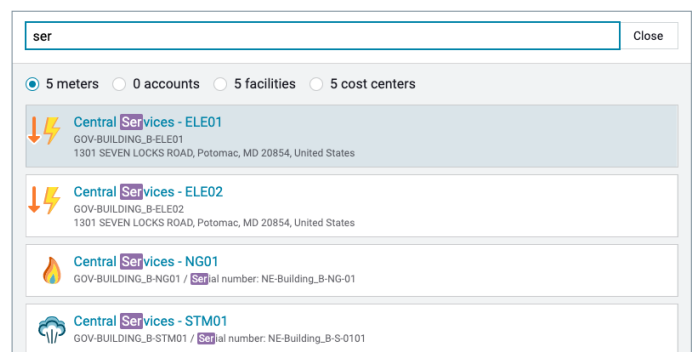
Vendors & Rate Schedule

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. Search results display a maximum of ten objects per type.



Create Button

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

Create
Common Tasks
Enter Bills
Import 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 keys and Enter key.

Enter New Bill
Search for Account
550
Account
MID-55017977137 [1231 Shop Rd - ELE]

Enter Bill Data

Easily move through the bill entry screen with the Tab or Enter key.

Start 10/23/2020	End MM/DD/YYYY	Days *	Amount due * \$
Billing period * Mont * Year	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 as you enter bills and provide immediate feedback.

April 2020 Bill ID: 1704 Audit Exception Approved Exported to AP Exported to GL Bill overlaps with another bill Due date is too many days after the end date of the bill	Government Master-Distribution - ELE01 GOV-3135400506 Germantown, MD 20874, United States PECO PECO Batch 20161130-ECI-SPLITS																																
<table border="1"> <thead> <tr> <th>Account History</th> <th>Timeline</th> <th>Note</th> <th>Flag Details</th> </tr> </thead> <tbody> <tr> <td>05/04/2020-06/03/2020</td> <td>\$17,465.77</td> <td></td> <td></td> </tr> <tr> <td>04/05/2020-05/05/2020</td> <td>\$17,070.77</td> <td></td> <td></td> </tr> <tr> <td>03/07/2020-04/05/2020</td> <td>\$16,665.64</td> <td></td> <td></td> </tr> <tr> <td>02/05/2020-03/07/2020</td> <td>\$15,570.12</td> <td></td> <td></td> </tr> <tr> <td>01/06/2020-02/05/2020</td> <td>\$15,673.83</td> <td></td> <td></td> </tr> </tbody> </table>	Account History	Timeline	Note	Flag Details	05/04/2020-06/03/2020	\$17,465.77			04/05/2020-05/05/2020	\$17,070.77			03/07/2020-04/05/2020	\$16,665.64			02/05/2020-03/07/2020	\$15,570.12			01/06/2020-02/05/2020	\$15,673.83			<table border="1"> <tr> <td>Start 04/05/2020</td> <td>End 05/05/2020</td> <td>Days 30</td> <td>Amount due \$17,070.77</td> </tr> <tr> <td>Billing period April 2020</td> <td>Due date 07/05/2020</td> <td>Statement date 06/02/2020</td> <td>Accounting period 07 2016</td> </tr> </table>	Start 04/05/2020	End 05/05/2020	Days 30	Amount due \$17,070.77	Billing period April 2020	Due date 07/05/2020	Statement date 06/02/2020	Accounting period 07 2016
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Error when Saving a Bill

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

Enter New Bill
The amount due does not equal the total cost.

Bill Entry Confirmation

Successful bill entry message.

Enter New Bill
Bill 1126 with a cost of \$ 100.00 was successfully created in Batch 20180905-ECI on Account 8675309.

Bills module

Manage, search, and import bills through **Bill Lists**.

Bill Lists

Bill lists are a set of configured and saved filters that provide a subset of bills. Create, copy, or share bill lists on the Bills module page.

Add a new bill list

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



My Bill Lists

Default Bill List

Bill Lists Shared with Me

AP Bills

Batches

Bill Import Log

Search by Bill List Name

Bill List	Description	
Default Bill List	Default Bill List	  

1 results

Manage filters

The number icon indicates applied filters.

Recommended filters are listed first, and the optional filters are in alphabetical order. Select filters on the left by checking the box. Remove filters on the right by clicking the **X**. Click **Apply** to see the results but continue to manage the filters. Click **Apply and Close** when finished.

\$ 80,305.01 Total Cost of 28 Bills

Filters1Columns

Filters

Search filters

Recommended

☒ Account is Active

☐ Bill is From a Vendor

☒ Bill is Void

☐ Billing Period

Account Code

equals

*

X

Account is Active

equals

ActiveInactive

X

Bill is Void

equals

VoidNot Void

X

Cost Center Code

equals

AP

X

Cancel

Apply

Apply and Close

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.

Edit Columns

CancelSave

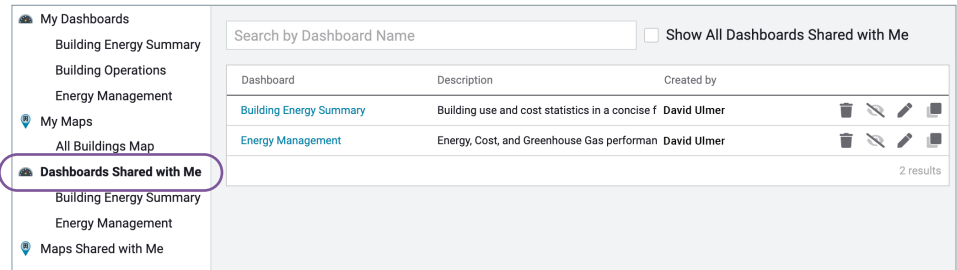
1	Account Number	2		
	Bill Begin Date			
	Bill End Date	3		
	Total Cost			
	Bill Entry Date		4	
	Bill Use			

Dashboards & Maps

Create and customize different dashboards and maps for departments or divisions within your organization. Maps plot all your buildings based on latitude and longitude or the building address. Manage maps the same as dashboards. Think of maps as a special type of dashboard with only one map per dashboard.

Copy a Dashboard or Map

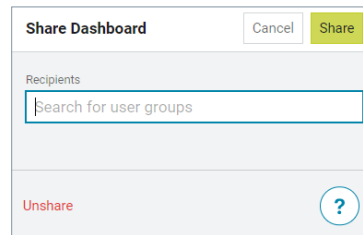
If your user role cannot edit a shared dashboard, copy the dashboard and edit the copy.



Share with Others

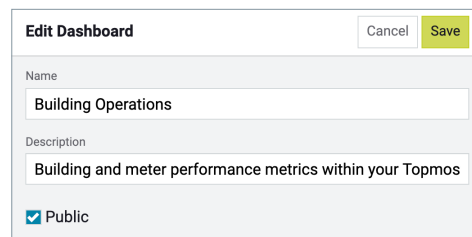
Share a dashboard with one or more groups.

Data displayed is dependent on user role and topmost permissions.



Share a Public Dashboard

Public dashboards and maps do not require a login. Access can be revoked at any time.



Manage My Dashboards

Manage dashboards by clicking on **My Dashboards**.

View the status of each dashboard.

Delete, edit, access public URLs, or copy the dashboard.

Not all user roles can share dashboards or make them public.

