

Adding a Template

Description

Bill Templates are commodity-specific forms that define a layout and sequence for entering utility bill information. Once they are created, templates can be assigned to accounts/meters, allowing associated billing and/or consumption information to be entered. Bill Templates allow customization to the appearance of the bill entry interface to closely match the billing information provided by the vendor for each account/meter. Templates ensure that bill entry personnel are capturing all desired billing data including use and cost.

This topic will...

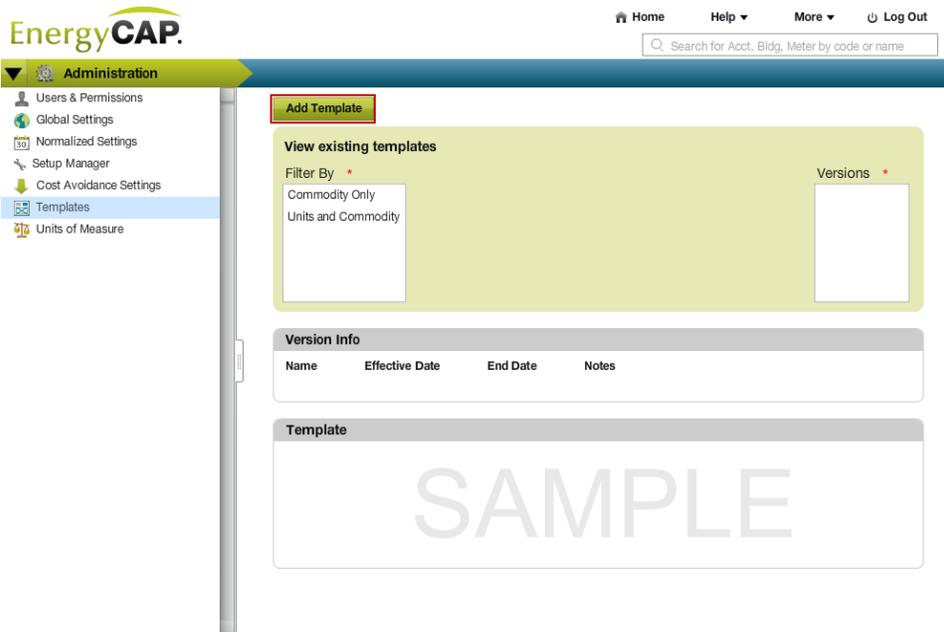
- describe the process for adding a template.

Prerequisites

- The ability to add template requires permissions associated with the following User Roles:
 - Administration Full Access
- Import a bill in the exact layout needed for the template

Step-by-Step

1. Navigate to the Administration section in one of two ways:
 - Select **Administration** from the Main Menu, OR
 - Click **Admin** under the More page header options.
2. Select the **Templates** node from the tree.
3. Click the **Add Template** button.



4. On the **Introduction** tab, read the template overview information. When done, click **Continue**.

Add Template ✕

Introduction

Acct/Meter Selection

Template Name

The Add Template wizard can be used to create a new manual bill entry template from an existing bill that has already been imported. The line items and captions of imported bills are easy to control using the bill import wizard in Bill Processing.

Once an imported bill exists to make a template from, follow this simple wizard to find a bill and save its format as a new template to be assigned to existing meters. After the new template is created, it can be assigned to meters through a meter update spreadsheet OR at the Meter Properties tab of any meter.

Please refer to the help manual for more information about the template wizard or importing bills that mimic current utility bills.

Note: Future releases of EnergyCAP Online will add template Edit and Save As features.

* Required Field

← Back
Continue →
Cancel

5. On the **Acct/Meter Selection** tab, locate the meter bill to be copied and then click **Continue**.
 - a. The **Search for an Account** field, locates the account the bill to be copied is attached to.
 - b. The **Select a Meter** field will displayed all the meters attached to the account selected.
 - c. Once the meter has been selected, the last 24 bills will be listed in the **Select a Billing Period** field.
 - d. The exact layout to be saved will be displayed in the **Sample** box below the fields.

Add Template ✕

Introduction

Acct/Meter Selection

Template Name

Search for an account *

Select a meter *

Select a billing period *

Mar 2011

Feb 2011

Jan 2011

Dec 2010

Meter: Z_HAYES_STEAMAD

Total Cost \$

Billed Demand kW

Actual Demand kW

Usage lb

SAMPLE

* Required Field

← Back
Continue →
Cancel

6. On the **Template Name** tab, input and edit the data as needed and then click **Finish**.

The screenshot shows a software window titled "Add Template". On the left side, there is a sidebar with three menu items: "Introduction", "Acct/Meter Selection", and "Template Name", with "Template Name" being the active selection. The main content area contains three input fields. The first is labeled "Name" with a red asterisk and contains the text "LB_TESTING_123-58_001". The second is labeled "Code" with a red asterisk and contains "LB_TESTING_12". The third is labeled "Notes" and is an empty text area. Below the "Code" field, there is a red asterisk and the text "* Required Field". At the bottom of the window, there are three buttons: "Back", "Finish", and "Cancel".

7. Once the template is saved, it must be assigned to a meter before it will be used during manual bill entry of a bill. Assigning a template can be done in one of two ways.
- Individually through the [Meter Properties](#) page
 - Through a mass update, using the Setup Manager, [Meter Update](#) spreadsheet.

Rules & Restrictions

- The default start date for the template is 1/1/1980.
- Only one version of a template can be created at this time.
- A template can not be deleted.
- Only active accounts show up in the account search.
- Only active meters that have a rate and template attached will show up in the meter field.

Additional Information

- The name and code for the template will default to the following format if there are enough characters:
UNIT_VENDORCODE_RATECODE_SEQNUM
This can be changed if desired.