Changing a Bill Entry Template

Description

Occasionally it may become necessary to change the bill entry template for a meter. Reasons for a change might include:

- The initial template was assigned in error.
- Data tracking needs of the organization have changed.
- The vendor has changed.
- The bill format has changed.

Each meter has an associated bill entry template. The goal in template selection is to choose the bill entry template that most closely matches the utility bill while including all desired fields for tracking relevant energy data.

NOTE: This topic is about selecting the appropriate template option from existing templates. You can also revise existing templates and create new ones through the Administration module component for Templates. Click here to view that related topic set.

This topic will...

- describe the process for changing a Bill Entry Template.
- provide information on how bill entry templates are named.

Prerequisites

- The ability to modify a Bill Template requires permissions associated with the following User Roles:
    - Administrator - Full Access
    - Bill Entry & Account Setup
    - Bldg Administrator

Step-by-Step

Changing a Bill Entry Template

1. Select **Buildings and Meters** from the Main Menu. The Buildings and Meters navigation Tree View will be displayed on the left.
2. Select the meter.
3. Select the Meter Properties tab. If necessary, scroll down to view the **Templates** list.
4. Click the **Edit** button next to the template.

5. If an electric meter, modify the demand tab as needed
6. On the Template Selection tab, select a new template as needed.
7. On the Date Selection tab:

    a. Enter or select an **Effective Date** that the template should become effective. Date defaults to today's date.
    b. **End Date** defaults to 'Present'. To change this date, click **Present** and enter or select the date the template should no longer be effective.

8. Click **Finish**. The template will be effective as of the selected **Begin Date**.

Rules & Restrictions

- To maintain consistency in tracked data, frequent changes to the bill entry template are not recommended.
- Using 'Present' as the end date indicates the date will continue to be the current date until 1/1/3000 OR until a template is added after it.

Additional Information

- Common naming conventions for the default list of available bill entry templates are (sequentially from left to right):

Vendor Type	
	• FD_ signifies "full service" vendor or "distribution" vendor. This template prefix often indicates a more complex and detailed EnergyCAP-defined template, usually including more bill line items than the Standard or Advanced templates. • S_ signifies a "supply" vendor. This template prefix indicates that usage for this template is information-only and is not included in any calculations (because the usage should already be tracked by a parallel FD vendor for this meter). • Optional prefix for the commodity's abbreviated unit of measure (DKTHM, KWH, etc.)
Abbreviated template description:	• A - Advanced • S - Standard
The demand indicator (Y (es) or N(o), electric meters only):	• N - Not tracking demand • Y - Yes tracking demand
Time-of-Use indicator (electric meters only):	• T1 - NOT a time-of-use rate • T2 - Off-Peak and On-Peak rates • T3 - Off-Peak, Mid-Peak, and On-Peak rates
Template revision number (1, 2, 3, etc...)	