

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.

The screenshot displays the EnergyCAP web application interface. The top navigation bar includes 'Home', 'Help', 'More', and 'Log Out'. A search bar is present with the text 'Search for Acct, Bldg, Meter by code or name'. The left sidebar shows a navigation tree under 'Buildings & Meters', with 'Boland Residence Hall Elec' selected. The main content area is titled 'Meter Properties' and contains several sections:

- Channels:** A table with columns: Type, Units, Method, Rule, Interval..., Earliest, Latest, Code, Summ...

Type	Units	Method	Rule	Interval...	Earliest	Latest	Code	Summ...
Demand	KW	Manual	Trip	43200	07/31/20...	12/31/20...	DEMAND...	Summary
Reading ...	Value	Manual	Odometer	43200	01/28/20...	12/31/20...	READING...	Average
- Groups:** A table with columns: Group, Category.

Group	Category
Electric	Commodity Auto-Group
CP Dining Services	DiningServices
MS1 Residence & Dining Buildings	Utility Committee - Electric
- Rates:** A table with columns: Account Code, Rate Code, Vendor, Start Date, End Date.
- Templates:** A table with columns: Template C..., Template N..., Account Co..., Vendor, Start Date, End Date.

Template C...	Template N...	Account Co...	Vendor	Start Date	End Date
KW_01	KW_01	2946109	Meter Grid	01/01/1980	
G_KW_01	G_KW_01	7785873	Great Energy I...	01/01/1980	

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.

Edit Template Assignment

Demand

Template Selection

Date Selection

Effective Date: *

End Date: *
 (Present)

Template Assignments

Template Code	Start Date	End Date
FD_KWH_A_Y_T1_01	01/01/2010	
KW_01	01/01/1980	01/01/2010

* Required Field

Back
Finish
Cancel

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	<ul style="list-style-type: none"> • 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:	<ul style="list-style-type: none"> • A - Advanced • S - Standard
The demand indicator (Y (es) or N(o), electric meters only):	<ul style="list-style-type: none"> • N - Not tracking demand • Y - Yes tracking demand
Time-of-Use indicator (electric meters only):	<ul style="list-style-type: none"> • 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...)	