



# Accounts & Meters Help Guide

## Adding an Account and Meter in EnergyCAP

### Description

A meter represents a commodity associated with a utility point of service. All utility bills are associated with a meter, and every meter must be associated with a utility account and a building or organization. This mandatory structure standardizes reporting and viewing of data. Bills must be associated with a meter even when no physical meter exists.

### This topic will...

- Describe the process for adding a meter.

### Note

- You will need the utility bill to reference during this process.

## Step-by-Step

1. Select **Buildings & Meters** from the Main Menu. The Buildings navigation Tree View will be displayed on the left.
2. Click the **Add** button below the Tree View. Click the **Add Meter** menu option.

The screenshot displays the EnergyCAP web application interface. The top navigation bar includes 'Home', 'Help', 'More', and 'Log Out'. A search bar is present for finding accounts, buildings, or meters. The main menu is set to 'Buildings & Meters'. The left sidebar shows a tree view with 'Parking' selected, listing sub-items like 'Adam Street Garage', 'Booth Garage', 'Irving Garage', and 'University Ave. Garage'. The main content area shows a 'Fiscal Year Summary' for 'Greenhouse Gas' with a 'Total Cost Summary' bar chart for 2010, 2011, and 2012. Below the chart is a 'Daily Average Cost' table comparing the current year (Feb 2012 - Jan 2013) to the previous year (Feb 2011 - Jan 2012). A context menu is open at the bottom left, showing 'Add Meter' as the selected option.

Year	Total Cost (\$)
2010	200,000
2011	220,000
2012	100,000

Category	Value
Percentage Change from Previous Year To Current Year	N/A
Current Year: Feb 2012 - Jan 2013	\$
Previous Year: Feb 2011 - Jan 2012	\$508.00

3. Review the instructional information provided with the Introduction tab. Then click **Continue**.

The screenshot shows a software window titled "Account/Meter Wizard" with a close button in the top right corner. On the left side, there is a vertical navigation menu with the following items: "Introduction" (highlighted in white), "Service Address", "Vendor", "Account Type", "Create Meters", and "Confirmation". The main content area on the right contains the following text: "Welcome to the Account and Meter Setup Wizard. You must create an account and meter record before you can enter utility bills for that account. The account record includes information such as vendor, the service location, the commodity of the meter and the units of measure. It's easiest to create a new account record if you have a recent utility bill for this account in front of you." Below this text, there is a red asterisk followed by the text "\* Required Field". At the bottom of the window, there are three buttons: "Back" with a left-pointing arrow, "Continue" with a right-pointing arrow, and "Cancel".

4. On the Cost Center tab, choose the appropriate radio button and then click **Continue**
- **Currently Selected Cost Center** will be an available option when creating more than one meter. It will display the previously selected cost center so that it can be easily used again.
  - **Create a New Cost Center** will create a new cost center for the account. Refer to Creating a Cost Center topic for more explicit cost center creation help.
  - **Select a Cost Center** will associate the account with an existing cost center. Use the hierarchy to select the desired cost center.

The screenshot shows the 'Account/Meter Wizard' dialog box with the 'Cost Centers' tab selected. The left sidebar contains a list of steps: Introduction, Cost Centers (highlighted), Service Address, Vendor, Account Type, Create Meters, and Confirmation. The main area contains the following text: 'The account must be assigned to a Cost Center. This Cost Center can be the Topmost Node.' Below this text are three radio buttons: 'Currently Selected Cost Center', 'Create a New Cost Center', and 'Select a Cost Center' (which is selected). Under 'Select a Cost Center', there is a tree view with 'Accounts' expanded, showing sub-items: 'Electric', 'Natural Gas', 'Steam', and 'Water'. At the bottom left, there is a red asterisk and the text '\* Required Field'. At the bottom of the dialog are three buttons: 'Back', 'Continue' (highlighted), and 'Cancel'.

5. On the Service Address tab, enter Service Address information in the fields provided. Then click **Continue**.

The screenshot shows a software window titled "Account/Meter Wizard" with a close button in the top right corner. On the left side, there is a vertical navigation menu with the following items: "Introduction", "Service Address" (which is highlighted), "Vendor", "Account Type", "Create Meters", and "Confirmation". The main area of the window contains the following fields and labels:

- Country**: A dropdown menu currently showing "United States".
- Street Address**: Two stacked text input fields.
- City**: A single text input field.
- State/Province/Region**: A single text input field.
- ZIP/Postal Code \***: A single text input field. A red asterisk indicates it is a required field.

At the bottom of the window, there are three buttons: "Back" (with a left arrow), "Continue" (with a right arrow and highlighted in green), and "Cancel". A red asterisk with the text "\* Required Field" is located at the bottom center of the main content area.

**Note:** Use the street address or nearest equivalent. Zip Code is required

6. On the Vendor tab, choose the appropriate radio button:
  - Select the desired vendor using the **Vendor** drop-down; OR
  - Add a new vendor by clicking the **Add** button. Refer to the [Adding a Vendor](#) topic for more explicit vendor help.
7. Click the radio button corresponding to the **Vendor Type**. Then click **Continue**.

The screenshot shows the 'Account/Meter Wizard' window. The left sidebar contains the following steps: Introduction, Service Address, **Vendor**, Account Type, Create Meters, and Confirmation. The main content area is titled 'Select or Add the Vendor \*' and features a dropdown menu with the text 'Select or Click + to Add' and a '+' button. Below this is the section 'What Type of Vendor Is This?' with a help icon (?). There are three radio button options: 'Full Service' (which is selected), 'Distribution Only', and 'Supply Only'. A red asterisk and the text '\* Required Field' are visible at the bottom of the main area. At the bottom of the window are three buttons: 'Back', 'Continue', and 'Cancel'.

**Note:** All meters in Oklahoma are full service unless it is a deregulated natural gas account. This circumstance charges both on the same meter due to two separate bills.

**Ex:** ONG would be Distribution and Commission of the Land is Supply

8. On the Account Type tab, complete the relevant information and then click **Continue**.
  - a. Enter the **Account Number**.
  - b. Click a radio button to indicate how the **Account Name** will be created. Complete additional fields if displayed.

**Account/Meter Wizard**

Introduction  
Service Address  
Vendor  
**Account Type**  
Create Meters  
Confirmation

**Account Number** \* ?

**Descriptive Account Name**

Use service street address as account name  
 Use account number as account name  
 Enter a name to help identify this account.

**Select the Account Type** ?

Normal purchased utility account - bill received from external utility vendor  
 Internal Billing - bill created from my submeter readings  
 Internal Billing - bill created from formula or calculation  
 Internal Billing - bill created as a percentage split of another bill  
 Internal Billing - bill created from smart meter interval data

\* Required Field

Back Continue Cancel

**Note:** Add your agency or institution abbreviation, then underscore, then the account number found on the utility bill.

**Ex:** OSUSTW\_54321

9. On the Create Meters tab, select the number of **Meters** to create using the drop-down list provided and then click **Continue**.

**Account/Meter Wizard**

Introduction

Service Address

Vendor

Account Type

**Create Meters**

Confirmation

Usage and cost information are always tracked on a meter-by-meter basis. Most utility bills clearly show meter data (electric meter, gas meter, water meter). However, some types of service do not have physical meters, such as sewer, street lighting, fuel oil, telecom and trash. Even when no physical meter exists, you must create a meter record because it simplifies and standardizes reporting and tracking.

When you have deregulated electric or gas service, you will create one meter and that meter will be assigned to both the Distribution Only account and the Supply Only account.

Examples:

- The account has one electric meter and one unmetered outdoor lighting point of service. Set this up as two meters.
- The account has one electric meter and one gas meter. Set this up as two meters.
- The account has line items for both electric KWh usage and electric demand KW. This is a typical commercial electric bill; set up one meter.
- The account, from my local municipal utility company, has electric, gas, water, sewer, trash and recycling. Set this up as six meters.
- This deregulated Supply Only account has one meter, but I have already created the meter under the Distribution Only account. Set this account up as one meter.

How many separate meters appear on the account you are creating?

1

\* Required Field

Back Continue Cancel

**Note:** Please read and understand the section circled in red before proceeding.



10. On the Create/Select tab, choose the appropriate radio button and then click **Continue**.
- Create a new meter** will launch the Meter Wizard and add a new meter to the Building hierarchy.
  - Select an existing meter** will associate an existing meter with the new account.

**Meter Wizard**

**Create/Select Meter**

Place Assignment

General Info

Additional Meter Info

Rate Code

Template Selection

**Meter 1 of 1**

Create a new meter

The wizard will lead you through the creation of this meter, allowing you to name it and setup initial attributes.

Select an existing meter

The meter for this account has already been created. This is most common when creating a new Supply Only account after previously creating a Distribution Only account for the same point of service. Navigate in the Building tree and highlight the existing meter that you want to assign to this new account.

▼ Demo

- ▶ Academic
- ▶ Administration
- ▶ Athletics
- ▶ Housing
- ▶ Parking

\* Required Field

Back Continue Cancel

11. On the Place Assignment tab, choose the appropriate radio button and then click **Continue**.
  - a. **Create a new Building** will create a new building for the meter. Refer to the Adding an Organization or Building topic for more explicit building creation help.
  - b. **Select a Place** will associate the meter with an existing building. Use the hierarchy to select the desired building.

The screenshot shows the 'Meter Wizard' application window. On the left is a sidebar with tabs: 'Create/Select Meter', 'Place Assignment' (selected), 'General Info', 'Additional Meter Info', 'Rate Code', and 'Template Selection'. The main area is titled 'Meter 1 of 1' and contains the following text: 'A meter must be assigned to a Place. This is usually a physical building, but it may represent a group of buildings on a shared service or a non-building structure (bridge, antenna tower, ballfield, etc.)'. Below this text are three radio buttons: 'Same as previous meter', 'Create a new Building', and 'Select a Place' (which is selected). Under 'Select a Place', there is a tree view with the following structure: 'Demo' (expanded), 'Academic', 'Administration' (expanded), 'Alumni/Faculty Center' (highlighted), 'Goldstein Student Center', 'Hawkins Complex', 'Tolley Administration', 'Athletics', 'Housing', and 'Parking'. A red asterisk and the text '\* Required Field' are located at the bottom left of the main area. At the bottom of the window are three buttons: 'Back', 'Continue' (highlighted in green), and 'Cancel'.

12. On the General Info tab, complete the relevant information and then click **Continue**.
  - a. Based on the commodity selected, the **Name** and **Code** are automatically generated. Edit these fields if desired.
  - b. To enter the **Address**, click the **Edit** button and add meter address information in the fields provided. Only ZIP/Postal Code is required. Then click **OK**.
  - c. (optional) Complete the **Serial Number** information for the meter. Typically, this number is physically stamped on the device by the manufacturer.

The screenshot shows a window titled "Meter Wizard" with a sidebar on the left containing the following menu items: "Create/Select Meter", "Place Assignment", "General Info" (highlighted), "Additional Meter Info", "Rate Code", and "Template Selection". The main area displays "Meter 1 of 1" with a help icon. Below this are several fields: "Commodity" (a dropdown menu showing "-- Select one --"), "Name" (a text input field), "Code" (a text input field), "Address" (a text area containing "123 Abc Lane", "Suite 101", and "State College, PA 16801" with an edit icon to the right), and "Serial Number" (a text input field). A red asterisk indicates required fields. At the bottom, there are "Back", "Continue", and "Cancel" buttons.

**Note:** The wizard will automatically generate suggestions for both **Name** and **Code**, please use the auto suggestions.

13. On the General Info tab, complete the relevant information and then click **Continue**.

- Select the meter primary use from the **Primary Use** drop-down OR Add a new primary use by clicking the **Add** button and following the prompts provided.
- In the **G/L Code** field, enter an accounting code used to specify how charges are posted to an organization's General Ledger. This code is only necessary if the organization is exporting billing data to an accounting system.
- If desired, complete the optional **Bill Entry Note**, which will be associated with the meter. Bill Entry Notes are visible during utility bill data entry for the associated account.

**Meter Wizard**

Create/Select Meter

Place Assignment

General Info

**Additional Meter Info**

Rate Code

Template Selection

**Meter 1 of 1**

**Primary Use**

Select or Click + to Add

**G/L Code**

**Bill Entry Note**

\* Required Field

Back Continue Cancel

**Note:** Skip **Primary Use** and **G/L Code**.

If you choose to enter a **Bill Entry Note**, the text entered in this field will show up every time utility data is entered for this meter. If there is nothing important to enter here, leave it blank.

14. On the Rate Code tab, choose the appropriate radio button and then click Continue.

- The **Rate Code** button provides a drop-down list to select an existing vendor rate.
- The **Create a new rate for this vendor** button provides fields to enter the new Rate Code and enter the associated unit of measure.

The screenshot shows the 'Meter Wizard' application window. On the left is a sidebar with navigation tabs: 'Create/Select Meter', 'Place Assignment', 'General Info', 'Additional Meter Info', 'Rate Code' (which is highlighted), and 'Template Selection'. The main area is titled 'Meter 1 of 1' and contains the following text: 'Enter the Rate that this meter is billed on. Most utility bills indicate a rate code or rate name somewhere on the bill such as General Service, GS-1, Rate 120, etc.' Below this text are two radio button options: 'Rate Code' (unselected) and 'Create a new rate for this vendor' (selected). Under the 'Rate Code' option is a dropdown menu showing '-- Select one --'. Under the 'Create a new rate for this vendor' option are two input fields: 'Rate Code \*' (a text box) and 'Unit of Measure' (a dropdown menu showing 'TON'). At the bottom of the window are three buttons: 'Back', 'Continue', and 'Cancel'. A red asterisk and the text '\* Required Field' are located at the bottom left of the main content area.

**Note:** Choose a **Rate Code**.

If you do not know the unit of measure **DO NOT** assume or guess, stop and call the vendor to find out.

15. If the commodity is Electric, select any demand options on the Demand tab. Then click **Continue**.

The screenshot shows a software window titled "Meter Wizard" with a green header bar. On the left is a vertical sidebar with several tabs: "Create/Select Meter", "Place Assignment", "General Info", "Additional Meter Info", "Rate Code", "Demand" (which is highlighted), and "Template Selection". The main content area is titled "Meter 1 of 1" and contains the following text: "A bill entry template defines what usage and cost line items you will be able to track for each bill. For most bills, usage and total cost are sufficient. However, for some accounts you may want to track additional details such as tax and special charges." Below this text are two checkboxes: "Peak demand (KW) charges" (checked) and "Enable Time-of-Use" (unchecked). At the bottom left of the main area, there is a red asterisk and the text "\* Required Field". At the bottom of the window are three buttons: "Back" (with a left arrow), "Continue" (with a right arrow and highlighted in green), and "Cancel".

16. On the Template Selection tab, select the desired bill entry template. Refer to [Modifying Bill Entry Templates](#) for additional template information. Then click **Finish** to save the meter information and close the Meter Wizard. If multiple meters are being created, the Meter Wizard will cycle through the meter creation process again (see Step 11).

**Meter Wizard**

Create/Select Meter

Place Assignment

General Info

Additional Meter Info

Rate Code

Demand

**Template Selection**

**Meter 1 of 1**

A bill entry template defines what usage and cost line items you will be able to track for each bill. For most bills, usage and total cost are sufficient. However, for some accounts you may want to track additional details such as tax and special charges.

**Template** ?

Standard: simple, quick and most popular

Advanced: more line items means more detail, also takes more time

Pick a template from the library

Electric Usage  kWh

Metered/Actual Demand  kW

Billed Demand  kW

Total Cost  \$

\* Required Field

Back Finish Cancel

**Note:** Take your time and choose the correct template. You may need to create a custom template. For more information on templates, please refer to the webinars and EnergyCAP help guide.

17. Review all information from the Confirmation tab; then click **Finish** to close the Account/Meter Wizard. Account setup information will be saved and the Wizard will close.

The screenshot shows the 'Account/Meter Wizard' window with the 'Confirmation' tab selected. The window title is 'Account/Meter Wizard'. On the left, a sidebar contains navigation buttons: Introduction, Service Address, Vendor, Account Type, Create Meters, and Confirmation (highlighted). The main content area displays the following information:

**Account Setup Confirmation**

**Account Number**  
12-865135

**Vendor Name**  
Gulf Coast Corporation

**Service Address**  
State College, PA 16801

**Meter Setup Summary**

Commodity	Name	Rate
Electric	Goldstein Student Center...	Elec 45

\* Required Field

At the bottom, there are three buttons: 'Back' (with a left arrow), 'Finish' (highlighted in green), and 'Cancel'.

### Rules & Restrictions

- When adding a meter from the Buildings & Meters Tree View, a new account must be created. If it is necessary to associate a new meter with an existing account, launch the meter wizard (**Add Meter** button) from the Account Tree View.
- The Account/Vendor combination must be unique. The same account number can only be used for different accounts when each of the accounts has a different vendor.