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...

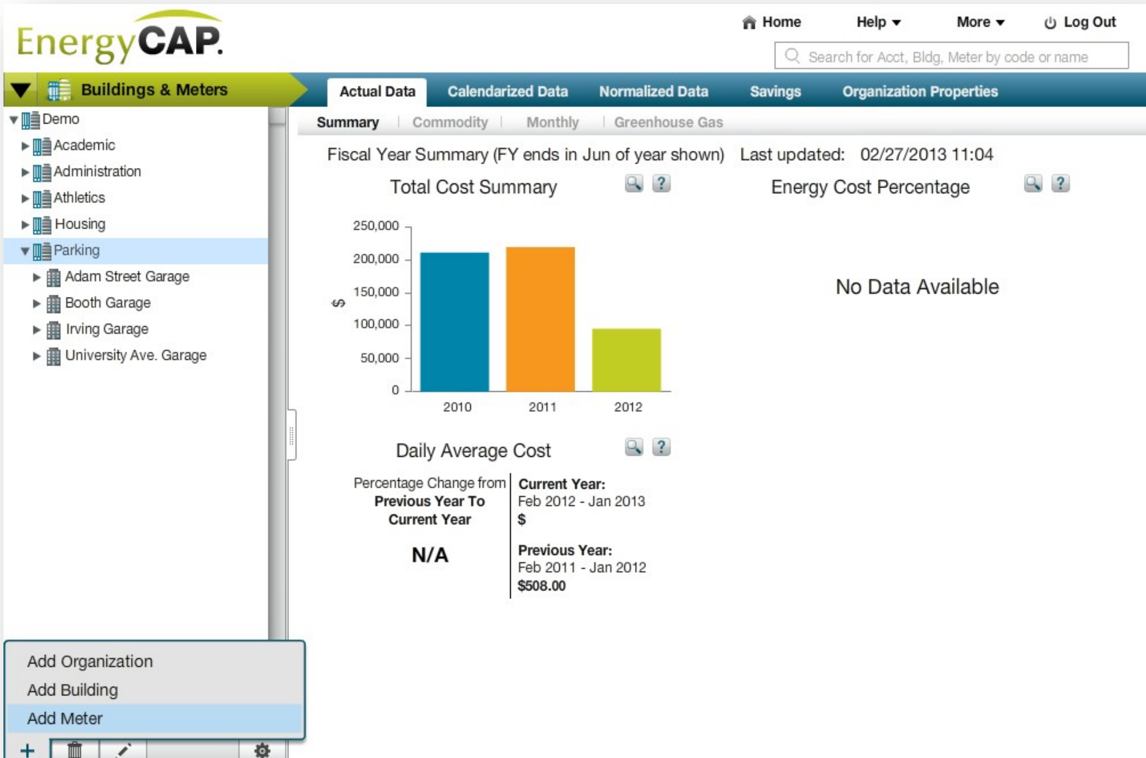
- Describe the process for adding a meter.

Note

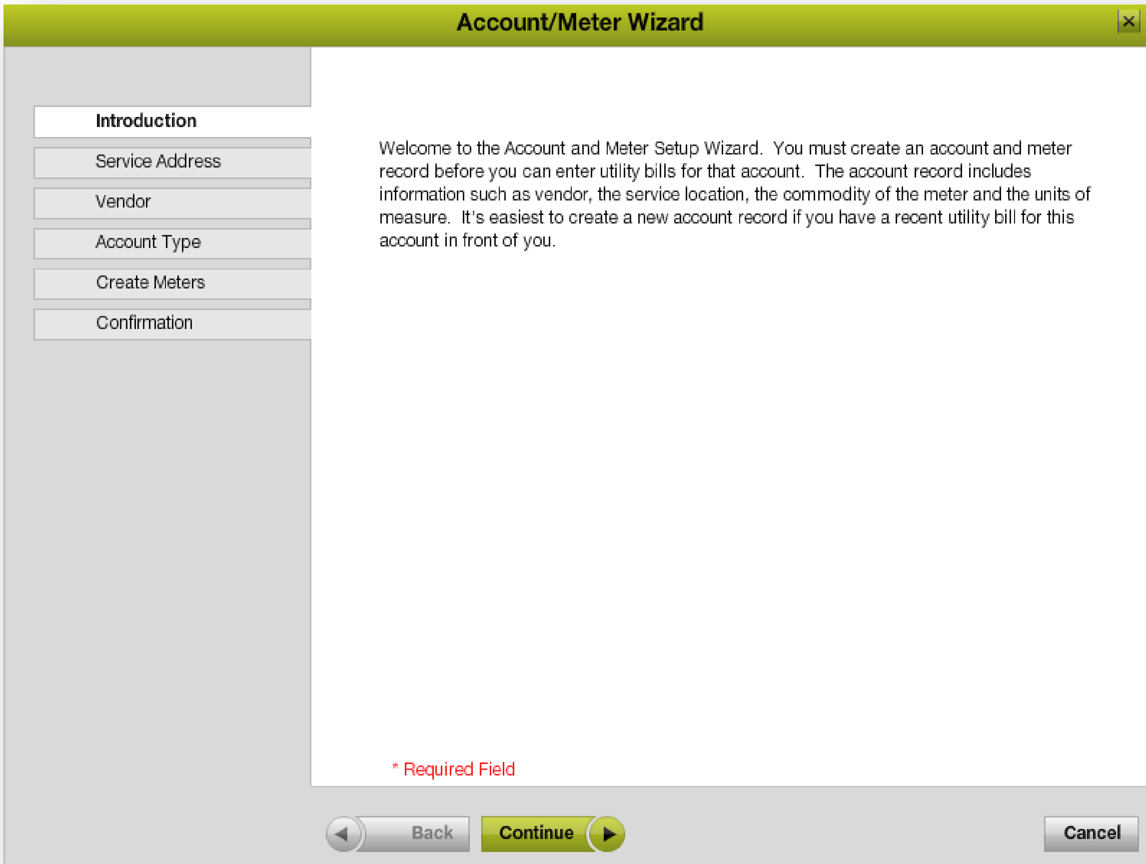
- You will need the utility bill to reference during this process.

Step-by-Step

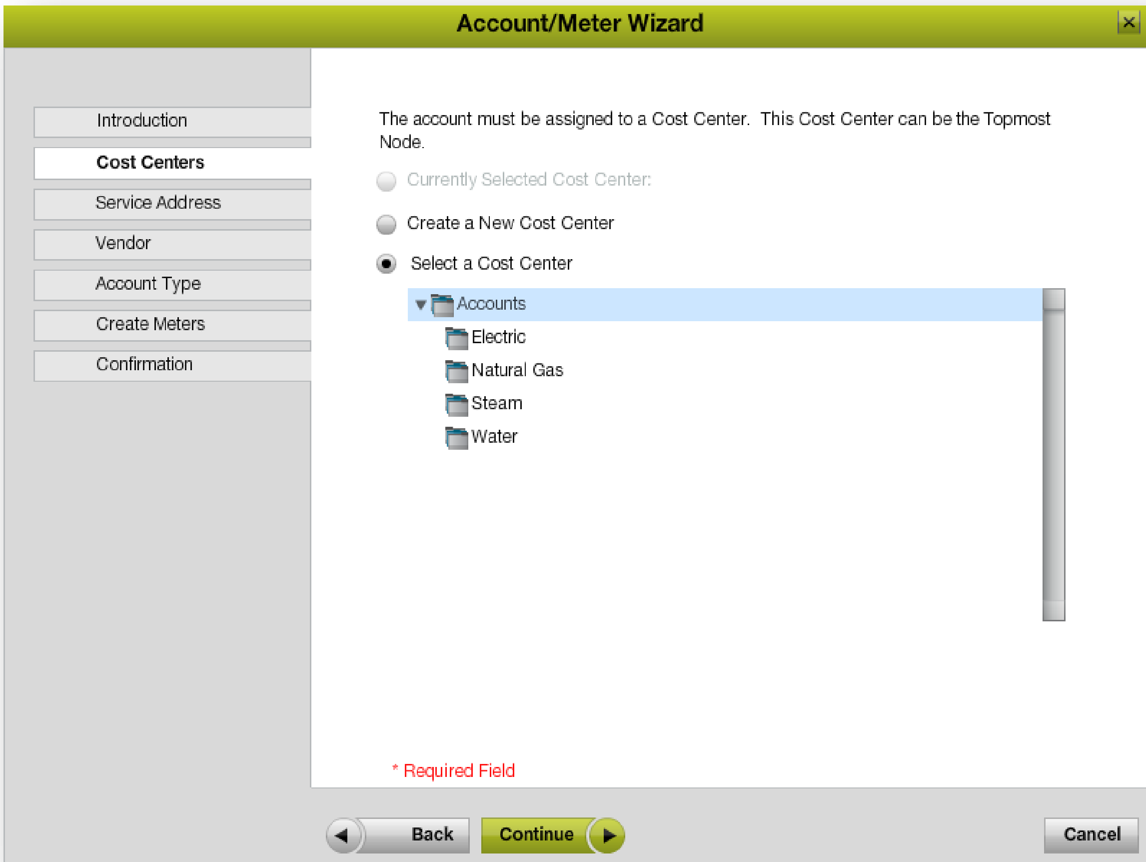
1. Select **Buildings & Meters** from the Main Menu. The Buildings navigation Tree View will be displayed on the left.
2. Click the **Add** button below the Tree View. Click the **Add Meter** menu option.



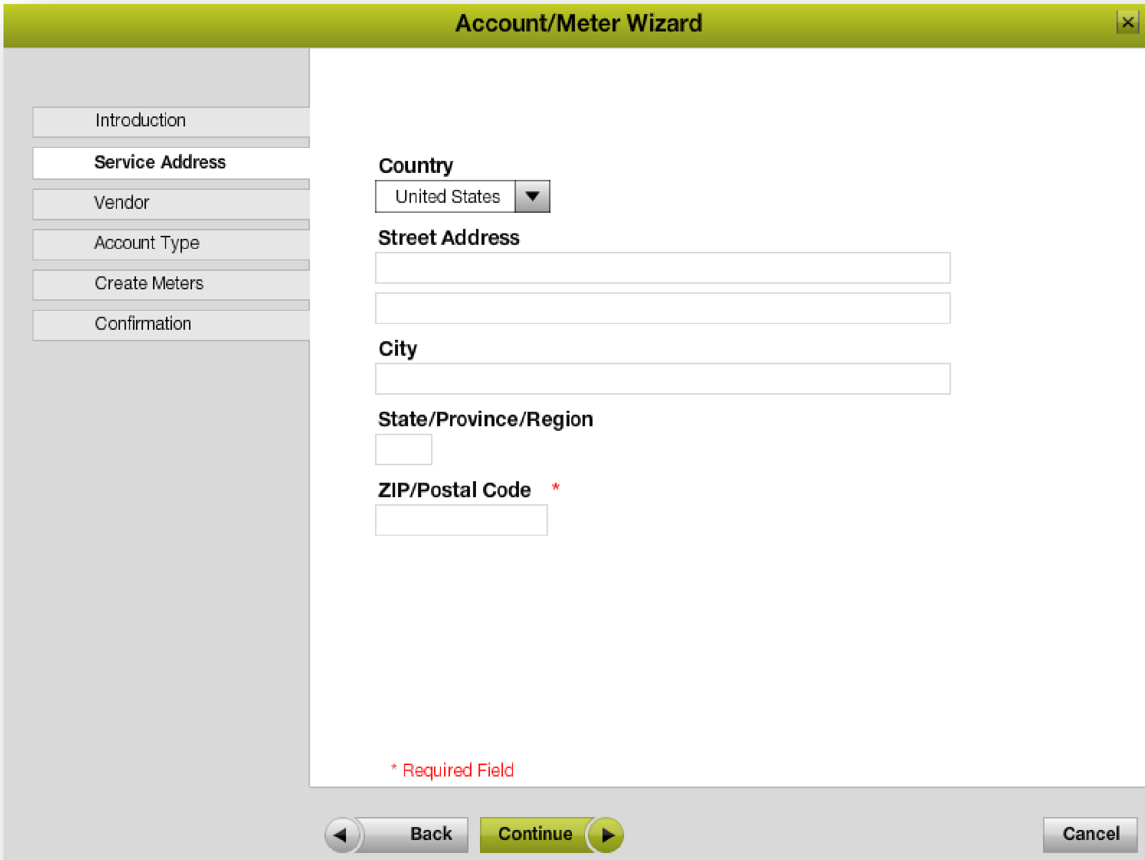
3. Review the instructional information provided with the Introduction tab. Then click **Continue**.



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 is 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.

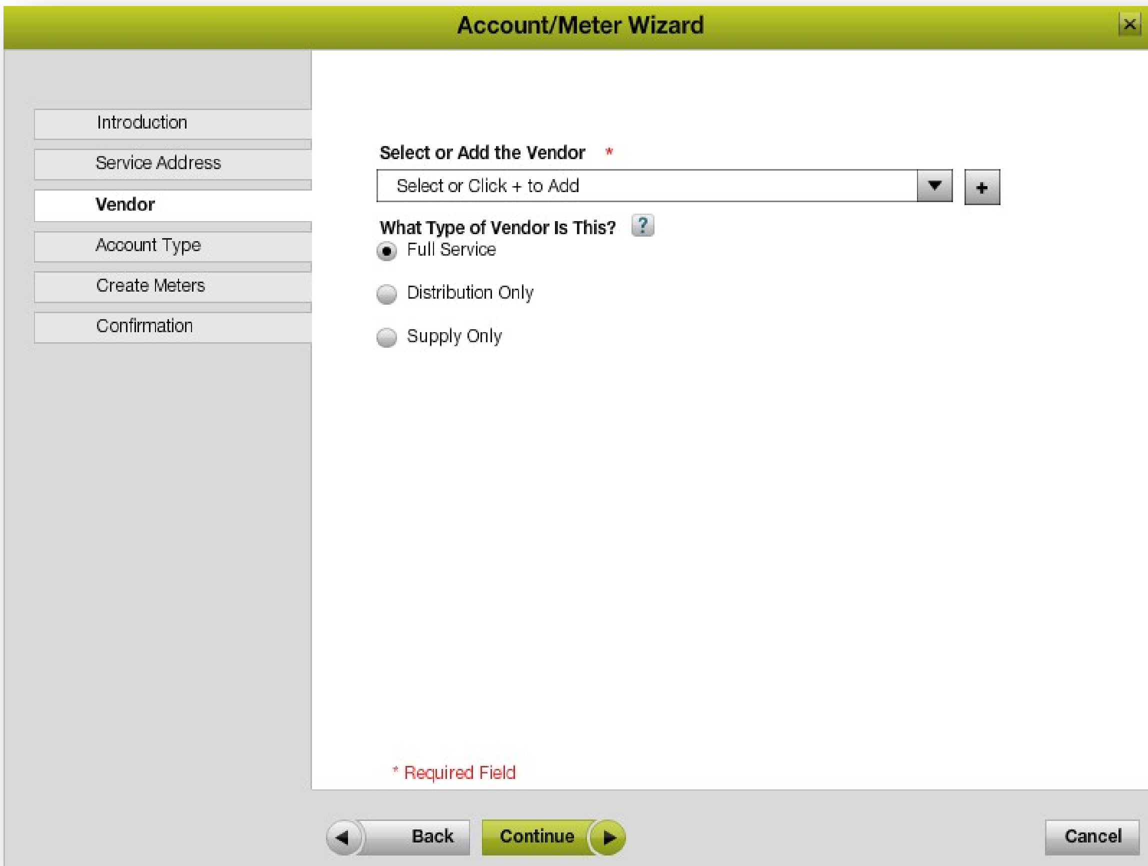


5. On the Service Address tab, enter Service Address information in the fields provided. Then click **Continue.**



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

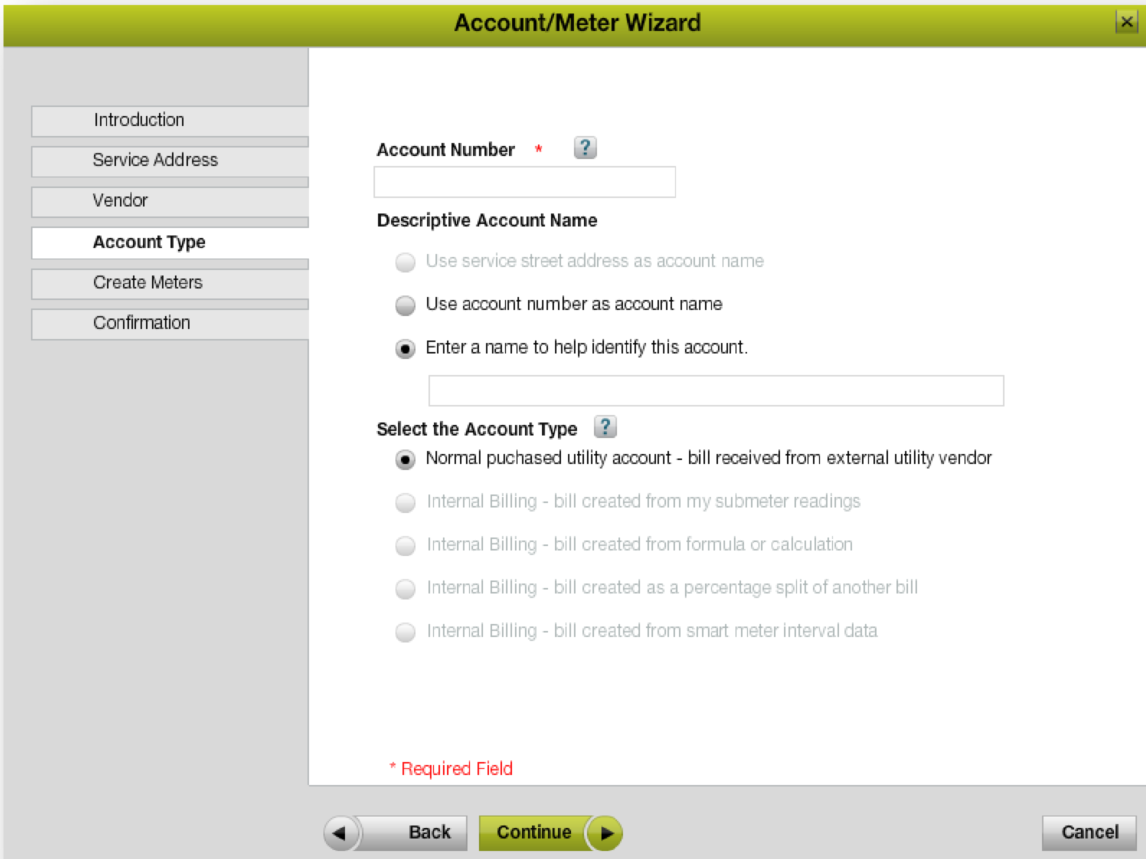
6. On the Vendor tab, choose the appropriate radio button:
    - Select the desired vendor using the **Vendor** drop-down; OR
    - Add a new vendor by clicking the **Add** button. Refer to the Adding a Vendor topic for more explicit vendor help.
7. Click the radio button corresponding to the **Vendor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



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

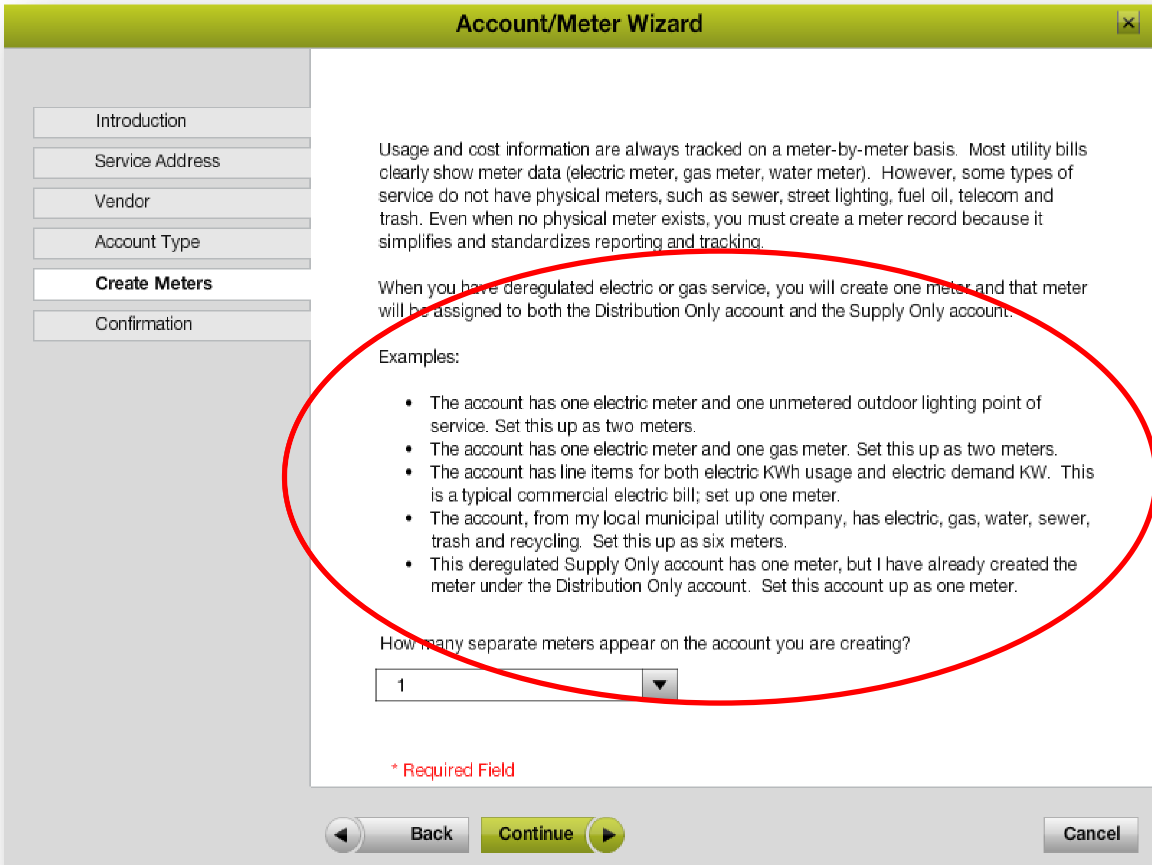
8. On the Account Type tab, complete the relevant information and then click **Continue.**
   a. Enter the **Account Number.**
   b. Click a radio button to indicate how the **Account Name** will be created. Complete additional fields if displayed.



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.**

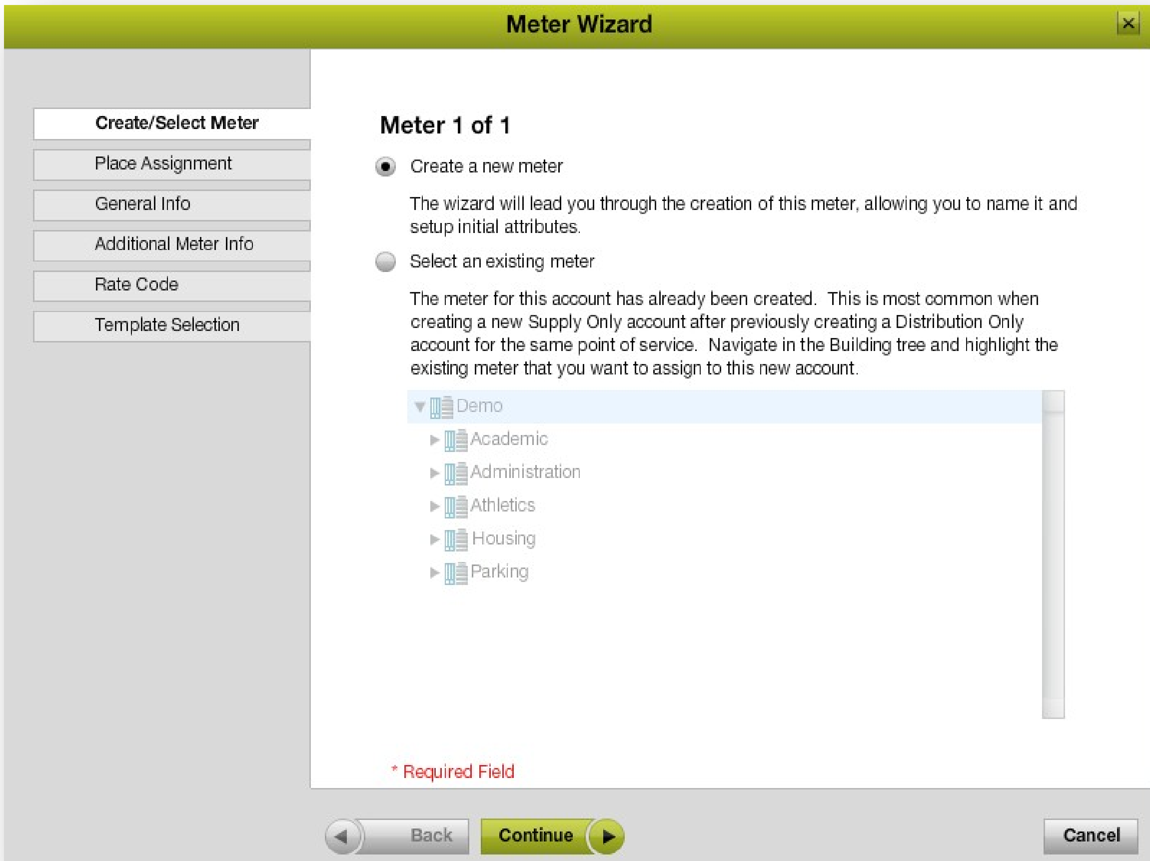


Note: Please read and understand the section circled in red before proceeding.

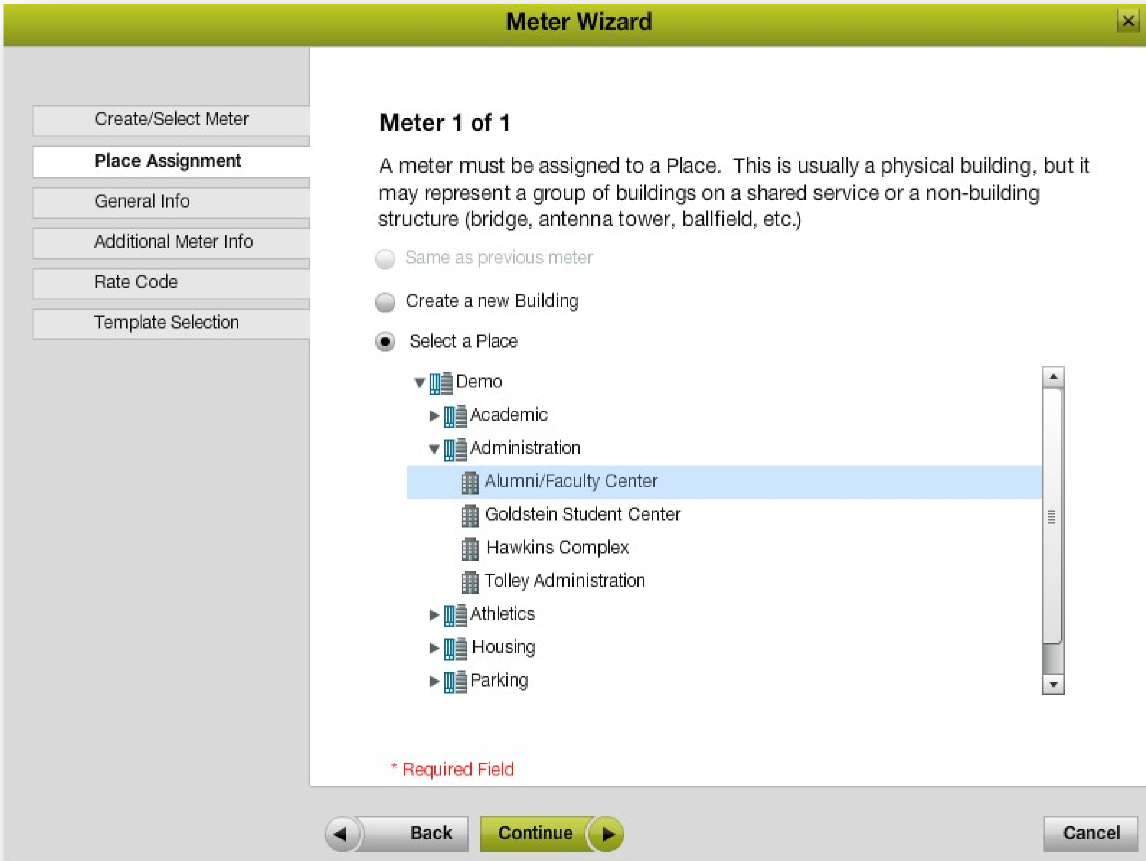
10. On the Create/Select tab, choose the appropriate radio button and then click **Continue.**

   a. **Create a new meter** will launch the Meter Wizard and add a new meter to the Building hierarchy.

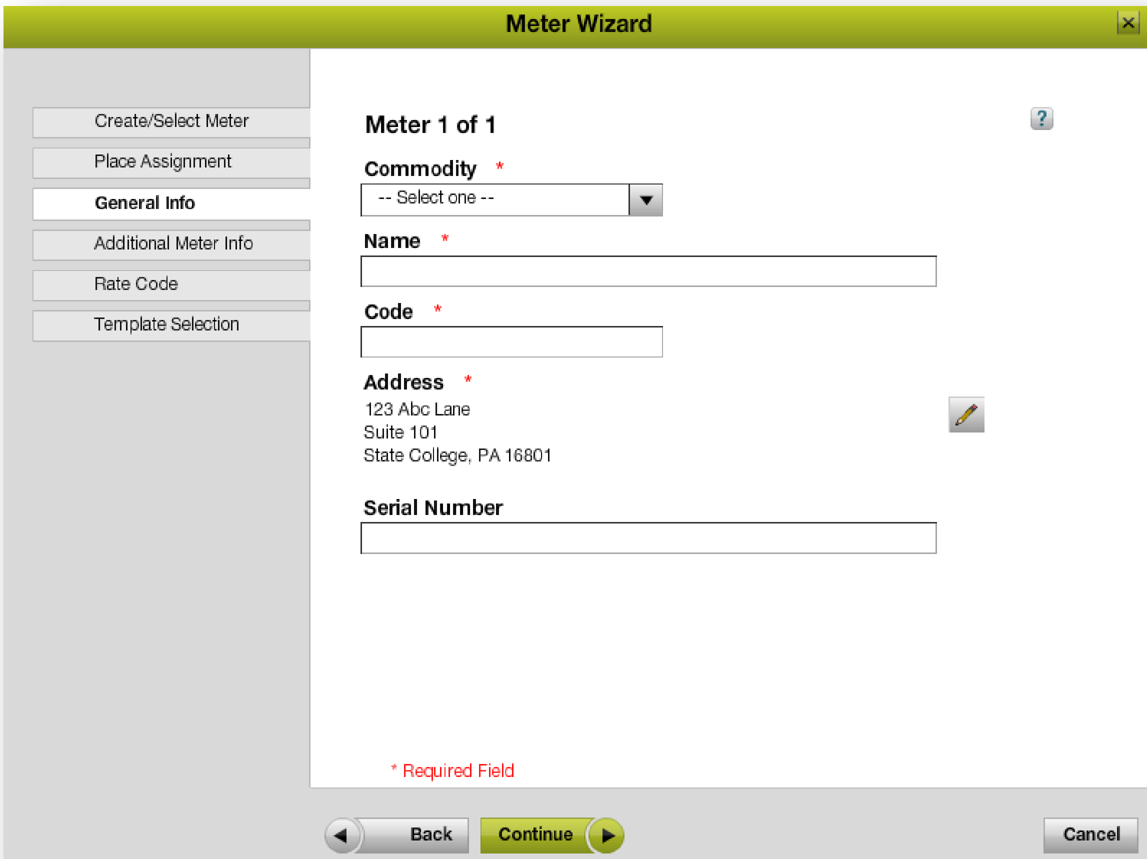
   b. **Select an existing meter** will associate an existing meter with the new account.



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.



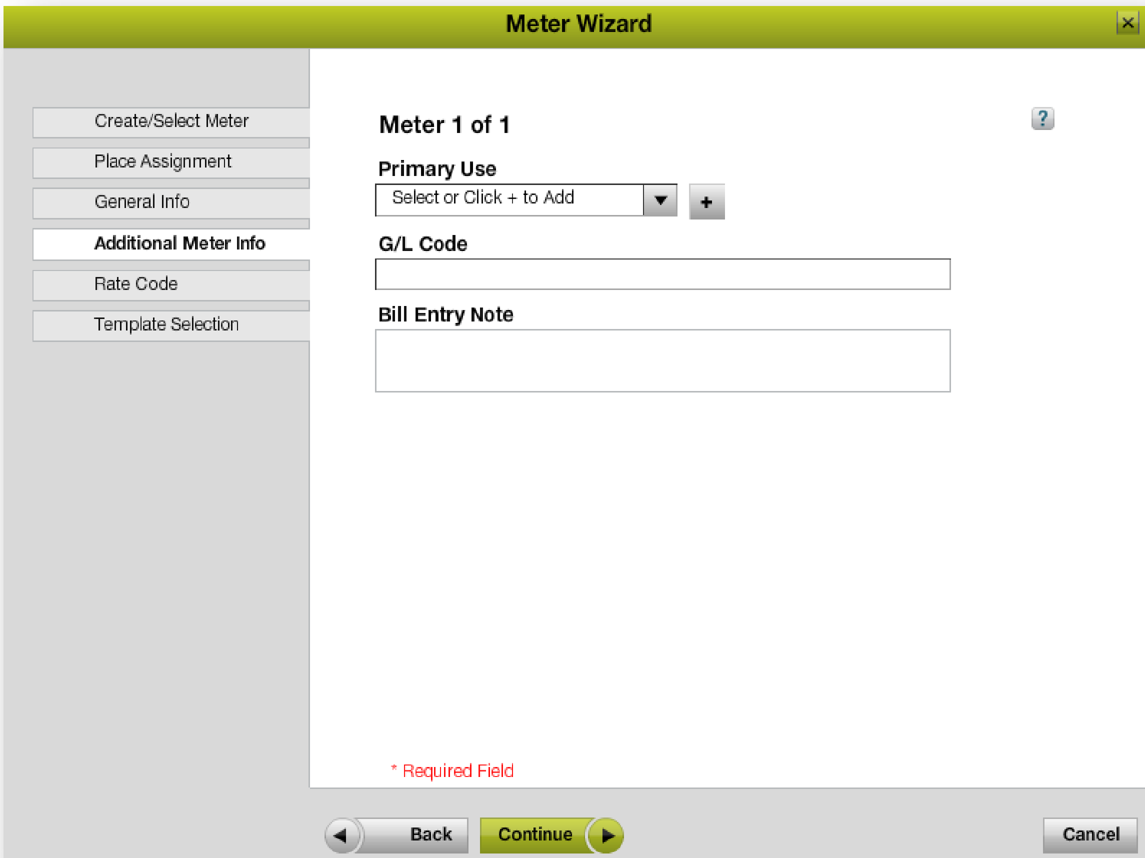
12. On the General Info tab, complete the relevant information and then click **Continue.**
    a. Based on the commodity selected, the **Name** and **Code** are automatically generated. Edit these fields if desired.
    b. To enter the **Address**, click the **Edit** button and add meter address information 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.



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.

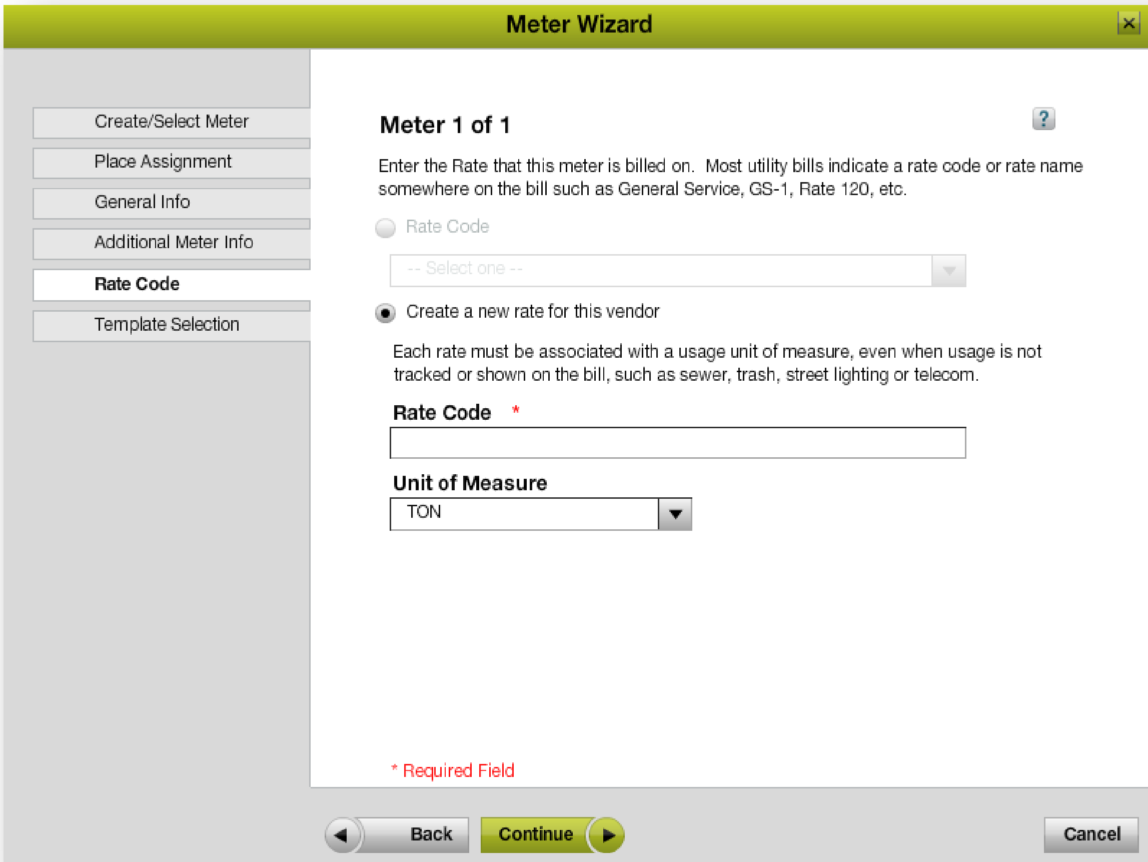


Note: Skip **Primary Use** and **G/L Code**.

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.

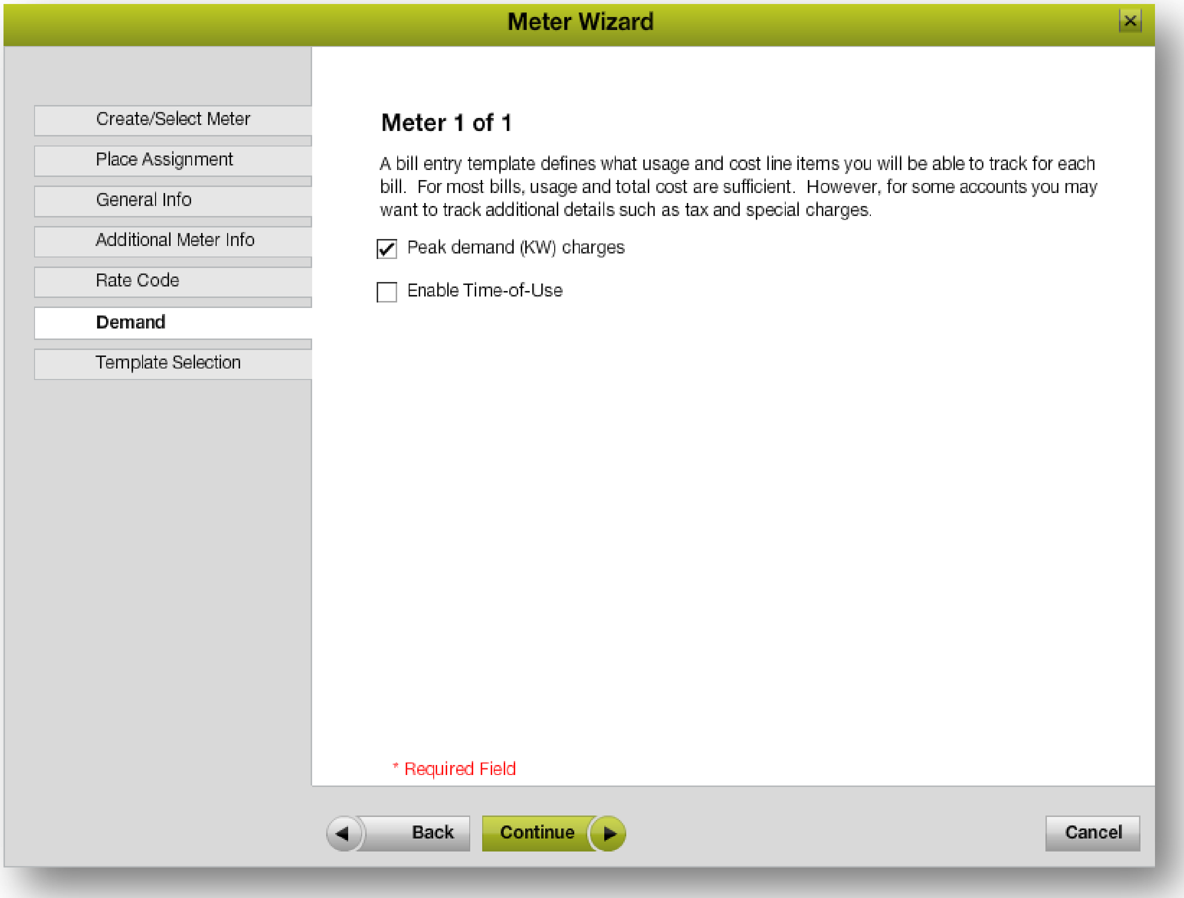
- The **Rate Code** button provides a drop-down list to select an existing vendor rate.
- The **Create a new rate for this vendor** button provides fields to enter the new Rate Code and enter the associated unit of measure.



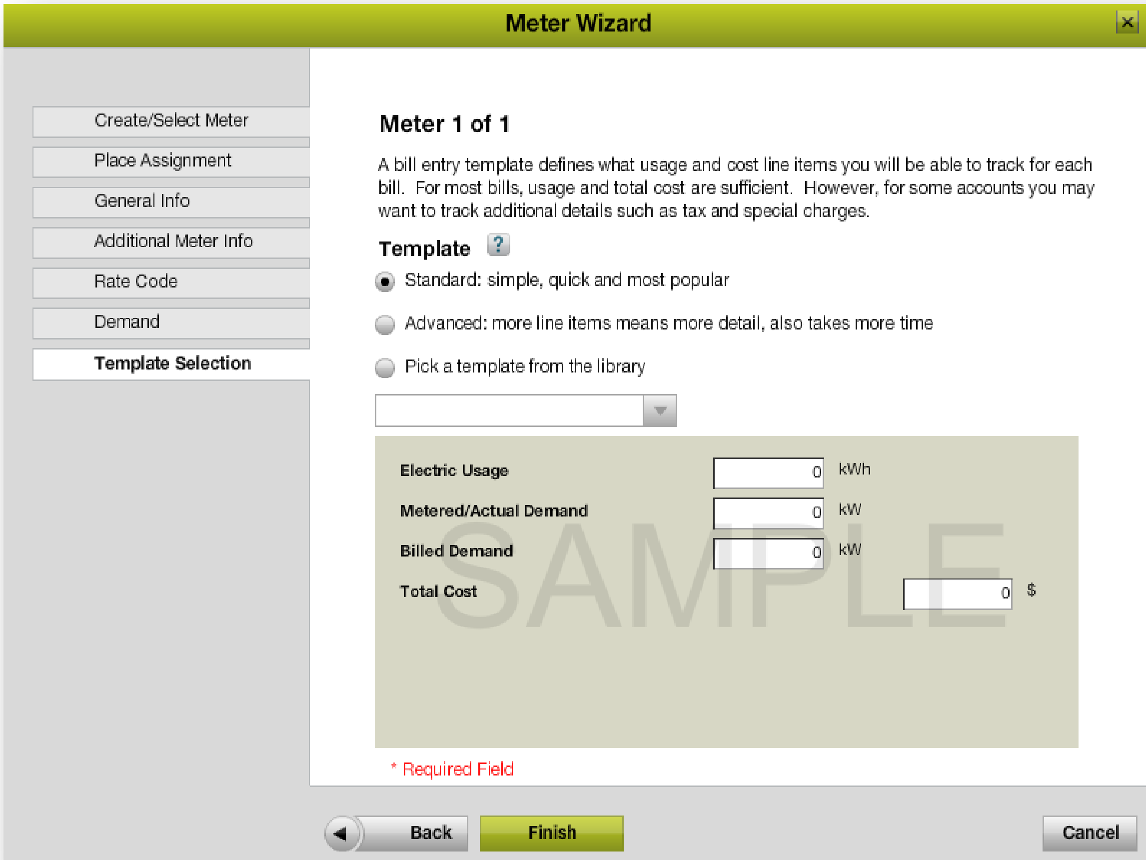
Note: Choose a **Rate Code**.

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.**

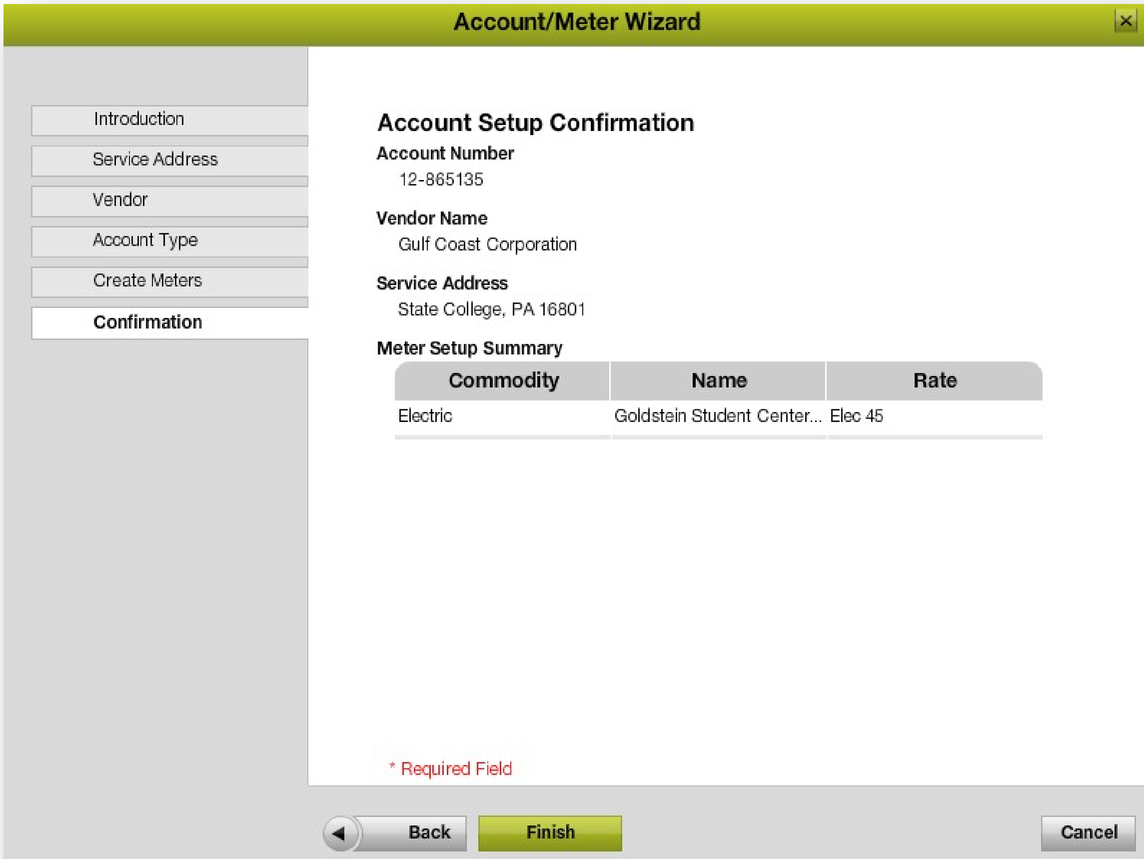


16. On the Template Selection tab, select the desired bill entry template. Refer to Modifying Bill Entry Templates for additional template information. Then click **Finish** to save the meter information and close the Meter Wizard. If multiple meters are being created, the Meter Wizard will cycle through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



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.



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.