



# Rate Wizard Guide

## Adding a Rate Code in EnergyCAP

### Description

A Vendor provides a Rate Code(s) for each commodity for which services are offered.

### This topic will...

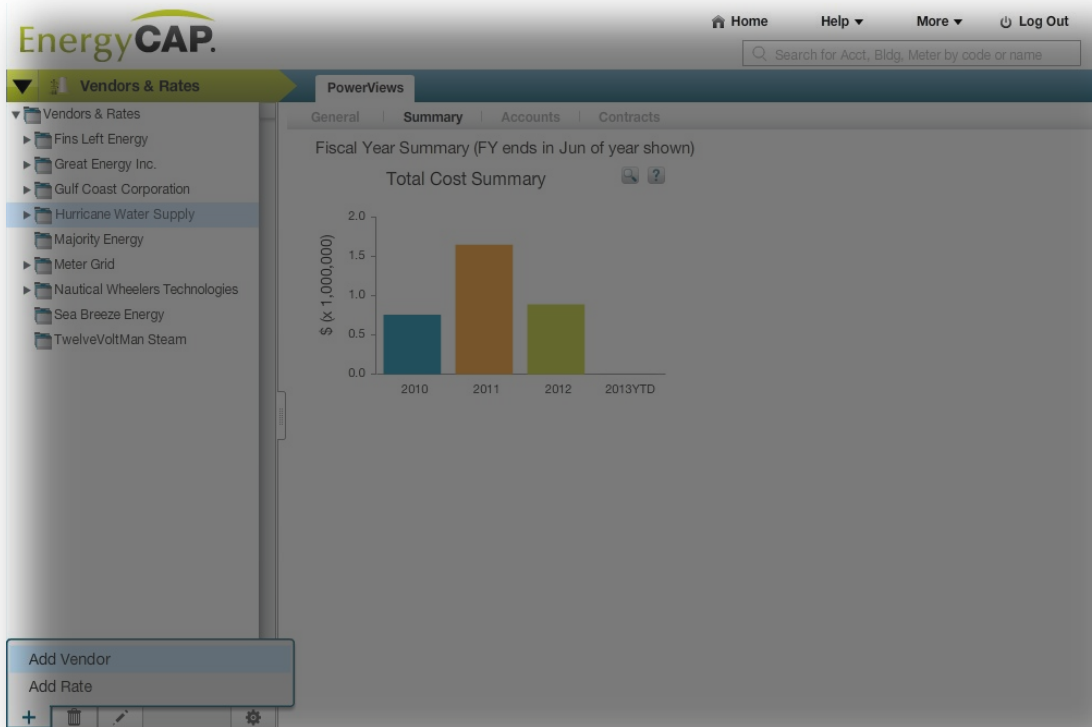
- Describe the process for adding a Rate Code associated with a vendor.

### Prerequisites

- The ability to add accounts requires permissions associated with one of the following User Roles:
  - Bill Entry & Account Setup

## Step-by-Step

1. Select **Vendors & Rates** from the Main Menu. The Vendors & Rates navigation tree view will appear on the left.
2. Click the **Add** button below the Tree View. Click the **Add Vendor** menu option.



**Note:** Please verify the rate for a vendor does not currently exist in the database. The database is shared by all users.

3. On the General tab:

- Enter a unique **Rate Code**.
- Select a commodity by clicking the **Commodity** drop-down list.

The screenshot shows a dialog box titled "Rate Wizard" with a "General" tab selected. The main area contains the following text: "Enter the name or label of the new rate code. 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 fields: "Code \*" with a red asterisk and an empty text input box, and "Commodity \*" with a red asterisk and a dropdown menu showing "-- Select one --". At the bottom left, there is a red asterisk and the text "\* Required Field". At the bottom right, there are two buttons: "Cancel" and "Save".

**Code:** ProviderAbbreviation\_RateName

**Ex:** OGE\_GENERALSERVICE, OKC\_INSIDECITY10

4. Click **Save**. The **Rate Wizard** window will close and the rate code is added.

### Rules & Restrictions

- The **Rate Code** must be unique for the rate and commodity combination selected. The same Rate Code can exist for another Vendor OR another commodity for the same Vendor.

### Additional Information

- **Rate Code** is used to create the various groups under Vendor-Rate Auto-Group, located in **Groups & Benchmarking**.