



Vendor Wizard Guide

Adding a Vendor in EnergyCAP

Description

Vendor information must be established before inputting utility bill data associated with that Vendor.

This topic will...

- Describe the process for adding a vendor.

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.

The screenshot displays the EnergyCAP web application interface. The top navigation bar includes 'Home', 'Help', 'More', and 'Log Out' options, along with a search box for accounts, buildings, and meters. The left sidebar shows a navigation tree under 'Vendors & Rates' with several vendor categories listed. The main content area is titled 'PowerViews' and shows a 'Fiscal Year Summary' for 'Total Cost Summary' with a bar chart for the years 2010, 2011, 2012, and 2013YTD. A context menu is open at the bottom left, showing 'Add Vendor' and 'Add Rate' options.

Year	Cost (\$ x 1,000,000)
2010	0.75
2011	1.65
2012	0.90
2013YTD	0.00

3. Input all General Information:

- a. In the **Name** field, enter the display name for the **Vendor**.
- b. In the **Code** field, a Vendor Code based on the name will be automatically created. This field can be changed to any desired value.
- c. If known, enter the full vendor website URL in the **Website** field. To check the accuracy of the website URL entered, select **View Site**. The website associated with the URL will open in a new window.

The screenshot shows a window titled "Add New Vendor" with a "General" tab selected. The main content area contains the following text: "Enter the common name of this vendor and give it a code. The vendor code is an abbreviation; many users enter the same vendor code used by their accounts payable system." Below this text are three input fields: "Name" (with a red asterisk), "Code" (with a red asterisk), and "Website". A "View Site" button is located below the Website field. At the bottom of the window, there are "Cancel" and "Save" buttons. A red asterisk legend at the bottom center indicates "* Required Field".

Note: Before entering a vendor, please verify the vendor is not currently in the system. The vendor database is shared by all users.

Name: Name of the vendor (Ex: Oklahoma Gas and Electric, City of Perkins)

Code: The abbreviation commonly associated with the provider, or see example.

Ex: **OGE** (Oklahoma Gas and Electric), **CITY_PERKINS** (City of Perkins)

Website: Not required.

4. Click **Save**. The **Add New Vendor** window will close and the Vendor will be displayed in the tree.

Rules & Restrictions

- A Vendor can only be created if the **Vendors & Rates** root node is selected. If an existing vendor node is highlighted when the **Add** button is selected, the **Rate Wizard** window for the selected vendor will appear.
- The Vendor Code for each vendor **MUST** be unique—it cannot be the same as any other existing Vendor in the database.
- The Vendor Code is up to 16 characters long, and is automatically created based on the **Vendor Name**. The code field does not allow special characters, only numbers and letters. If special characters are entered in the Code field, they will be removed when the Vendor Code is created.
- If the Name is not unique, the code will be created with a unique numeric extension (Ex: name-01). This may result in the entered code being truncated.