

CATALYST



Advanced Bill CAPture



Beth Calehuff
Senior Manager,
CAPture Services



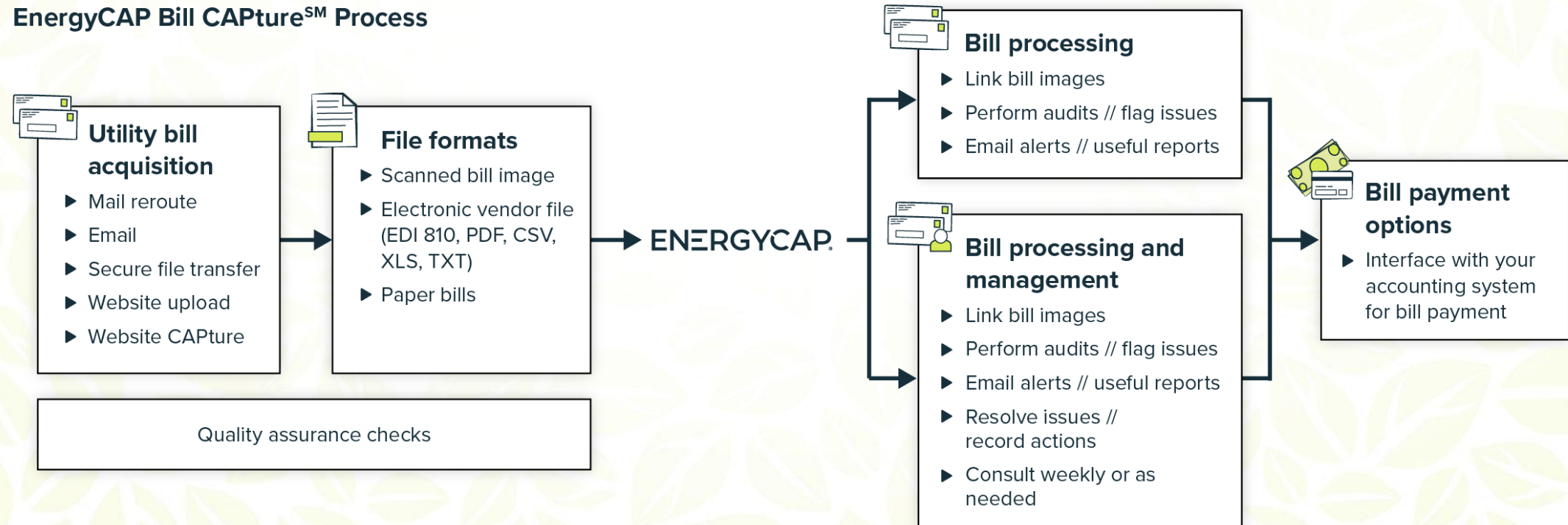
- ✓ What is Bill CAPture?
- ✓ Why Bill CAPture?
- ✓ Overview of Options
- ✓ Bill CAPture Enrollment
- ✓ In-app Demo
- ✓ Q&A

What is Bill CAPtureSM?

Capture utility bill data and convert it into important energy cost and consumption information.

We do the work for you to collect, interpret, process, and enter utility bills into EnergyCAP.

EnergyCAP Bill CAPtureSM Process



Common terms and acronyms

SLA | Service Level Agreement

- Live: 3-5 business days
- Web Download: 8-10 business days
- Historical or Gap: Varies based on volume

Transaction | Single commodity/meter

Problematic scan | An image that doesn't meet scanning guidelines

Bill CAPture Kickout | Processed bills are not successfully imported

History Lesson

Early Days of Bill CAPtureSM

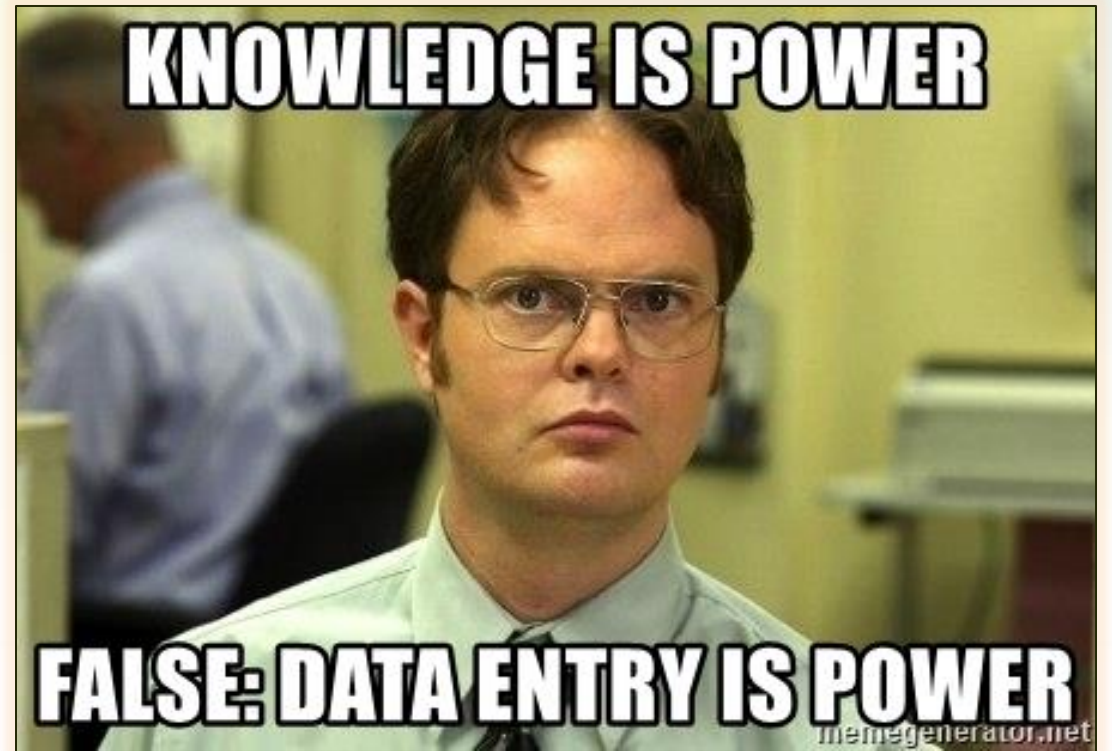
Original offering was for bill imports (xls, txt, EDI 810)

PDF processing added in 2009

Bill CAPture site outside of Utility Management

- Import failures were all or nothing
- Batch records unavailable in app

FTP delivery for electronic; postal mail for hard copy



Bill CAPture today

Bill CAPture in the UtilityManagement app

- Account level charge distributions
- User defined line type mappings
- Exclusion of failures from batch import

Added flat file format options (xls, txt, EDI 810, XML, CSV)

Image files (PDF, tiff, tif, jpeg) handling

Data acquisition (web download, email, SFTP)

Expansion of service offerings - Audit & Vendor Engagement

Why Bill CAPture?

Utility Invoicing is a **Lawless Land**:

- Data acquisition is not easy
- Identifying vendor sources a challenge
- A variety of formats and file types to track
- Automated vs manual acquisition
- Data exchanges, formats, and communication protocols can be complex
- Cumbersome and redundant workflow processes



**this rogue EnergyCAT has not been brand approved*

Acquiring the Data

Flexible options for receiving bills:

- Web Download
- Email
- Postal Mail
- SFTP
- In-app Upload

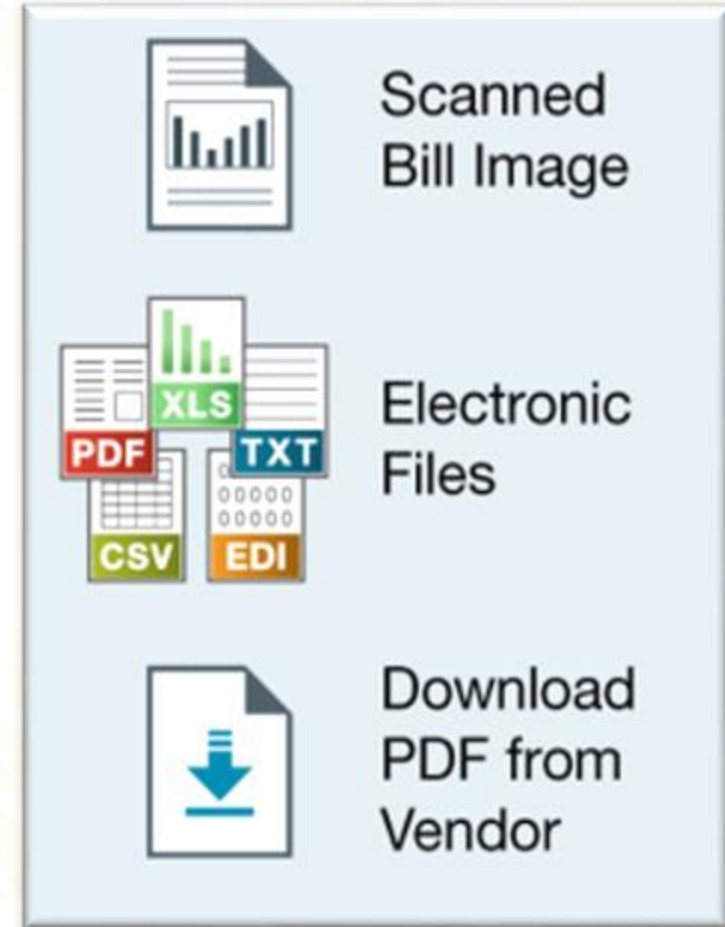


Processing Options

Bill CAPture – Scanned Bill Image

DataCAP – Electronic Files

Web CAPture – Download PDF from Vendor



Bill CAPture // Bill Image Files

Paper/PDF/Scans

FTP

Website Upload

Email

Mail Reroute

your power company

For services, call 1-800-234-2832
Visit www.yourpowercompany.com

Service for:
Kerita Data Center
101 Sandy Drive
State College, PA 16803
555-555-5555

Vendor:
Best Gas Supply

Account Number	11247 57413 (Kerita Data Center - NG - Supply)
Billing Period	Nov 01 2022
Due Date	12/27/2022
Statement Date	02/04/2017
Amount Due	\$8149.39

Bill Details

Meter Code	Meter Display	Place Code	Place Display	Type
NE-BUILDING_AJ-ELE01	Kerita Data Center - ELE01	NE-BUILDING_AJ	Kerita Data Center	Actual

Your Usage Profile

Electric Supply Usage: 285,855 kWh

Total Cost	\$2727.63
Meter Total	\$5467.36
Total	\$8194.39

11/01/2022 to 12/02/22 - 31 days

8884214 1234-56789 165413

1400 N Lincoln Ave - ELE
1635011000
1400 N Lincoln Ave, Happy Valley, PA 12345, United States

PA Gas Electric Co.
PGE
United States

Batch
20230126_BILLCAPTURE

Account History	Timeline	Note
11/01/2022-12/02/2022	\$8,194.39	
10/03/2022-11/01/2022	\$6,643.59	
09/01/2022-10/03/2022	\$7,495.63	
08/03/2022-09/01/2022	\$7,604.47	
07/05/2022-08/03/2022	\$7,196.44	

Start: 11/01/2022
End: 12/02/2022
Days: 31
Amount due: \$8,194.39

Billing period: November 2022
Due date: 12/27/2022
Statement date: 12/02/2022
Control code: sample

City Hall-ELE01
CITY HALL-ELE01

Daily Use (Calendarized): 2,626.400 kWh
Daily Cost (Calendarized): \$263.75

Basic Charge
Customer Charge: \$45.00

System Usage Charge
Info Use: 81600 kWh: \$819.26

Off-Peak Usage
Off Peak Use: 27600 kWh: \$917.42

On-Peak Usage
On Peak Use: 54000 kWh: \$2604.96

Generation Demand Charge
Generation Billed Demand: 185 kW: \$865.80

Off-Peak Demand
Off Peak Demand: 231 kW: \$0.00

Total Cost
\$8194.39

Bill CAPture
Platform

	AccountCode	StartDate	EndDate	A/C/E	VENDORCODE	DUE DATE	CONTROL CODE	USE:KWH:Electric Usage	DEMAND:KW:Electric Demand	CHARGE:USDOLLARS:Cost
1	12345-09995	20110701	20110801	A	ELELOCAL	20110816	107808820	3983211	5993	219985.19
2	12345-09995	20110801	20110901	A	ELELOCAL	20110916	250350511	3893899	5860	222456.97
3	12345-09995	20110901	20111001	A	ELELOCAL	20111016	662314443	3522684	5308	225499.63
4	12345-09995	20111001	20111101	A	ELELOCAL	20111116	804474826	3042992	4594	230680.06
5	12345-09995	20111101	20111201	A	ELELOCAL	20111216	352578543	3107560	4690	225494.37
6	12345-09995	20111201	20120101	A	ELELOCAL	20120116	73763808	4002335	6021	198282.46
7	12345-09995	20120101	20120201	A	ELELOCAL	20120216	531811739	3650521	5498	246756.56
8	12345-09995	20120201	20120301	A	ELELOCAL	20120316	358933753	3734493	5623	252957.79
9	12345-09995	20120301	20120401	A	ELELOCAL	20120416	347485659	2961438	4472	272651.25
10	12345-09995	20120401	20120501	A	ELELOCAL	20120516	638219149	3240981	4888	199978.84
11	12345-09995	20120501	20120601	A	ELELOCAL	20120616	152116463	3184985	4805	252677.73
12	12345-09995	20120601	20120701	A	ELELOCAL	20120716	835037114	3799800	5720	188365.95
13	12345-09995	20120701	20120801	A	ELELOCAL	20120816	566381323	3079231	4648	228458.08
14	12345-09995	20120801	20120901	A	ELELOCAL	20120916	347088883	2652243	4012	277768.4
15	12345-09995	20120901	20121001	A	ELELOCAL	20121016	766211372	3749406	5645	175760.82
16	12345-09995	20121001	20121101	A	ELELOCAL	20121116	641702527	3702011	5574	203263
17	12345-09995	20121101	20121201	A	ELELOCAL	20121216	202895942	2665296	5520	176532.72

Web CAPture // Bill Image Files

Thousands of supported vendors

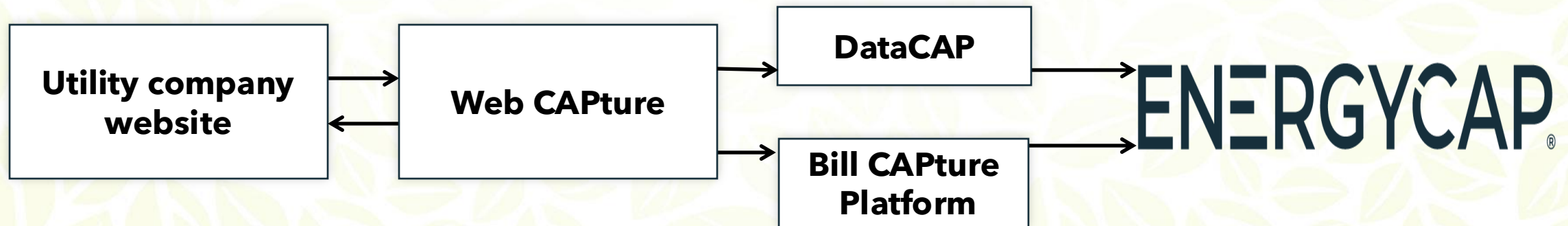
Login using credentials

Download PDF

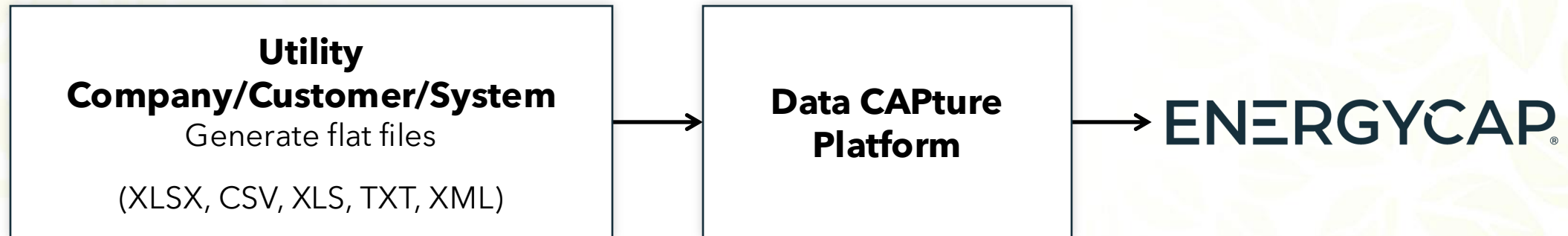
Longer SLA

Considerations for dual authentication and CAPTCHA

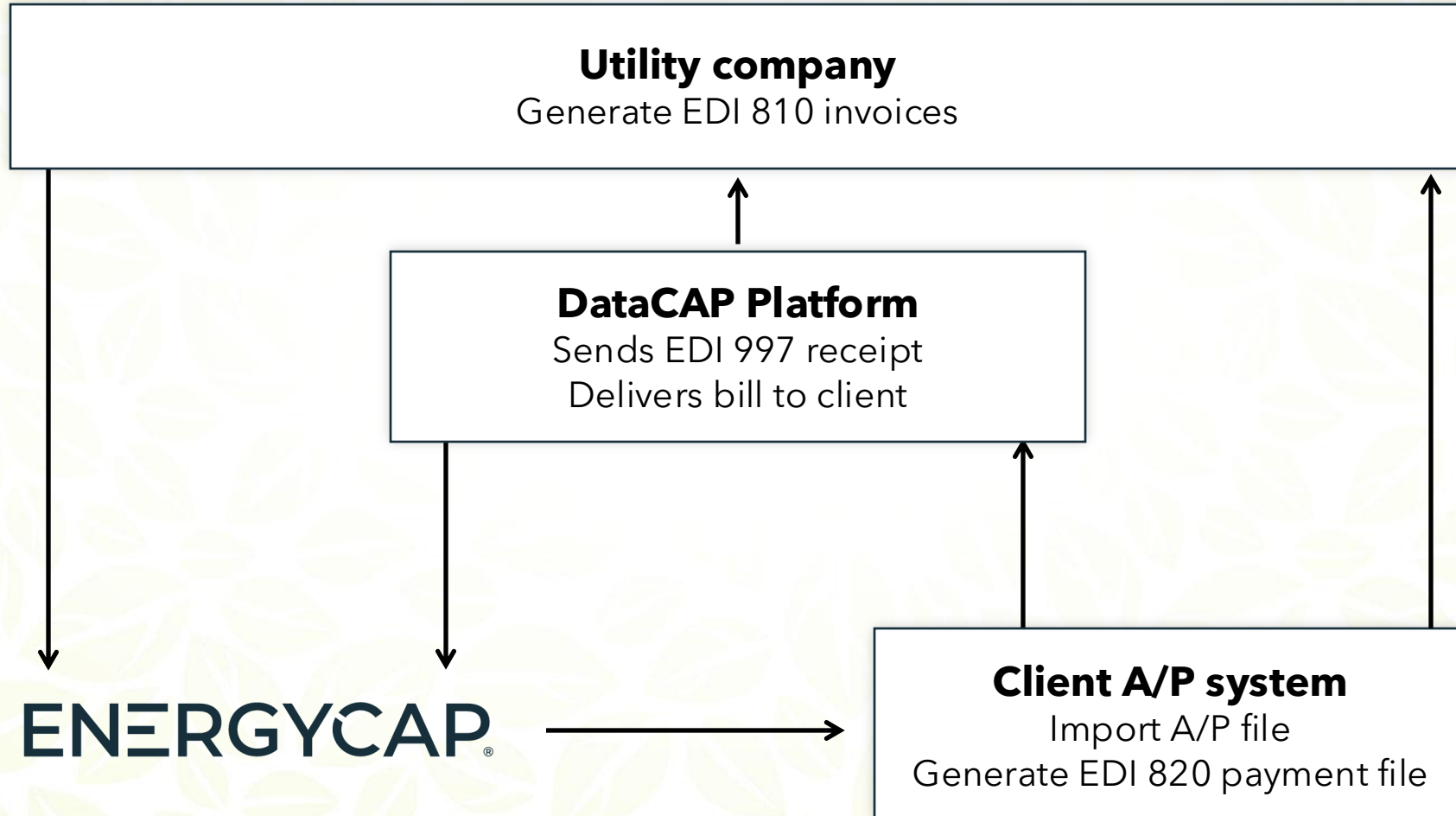
~ **14,000** supported utility vendors worldwide



DataCAP // Flat File Import

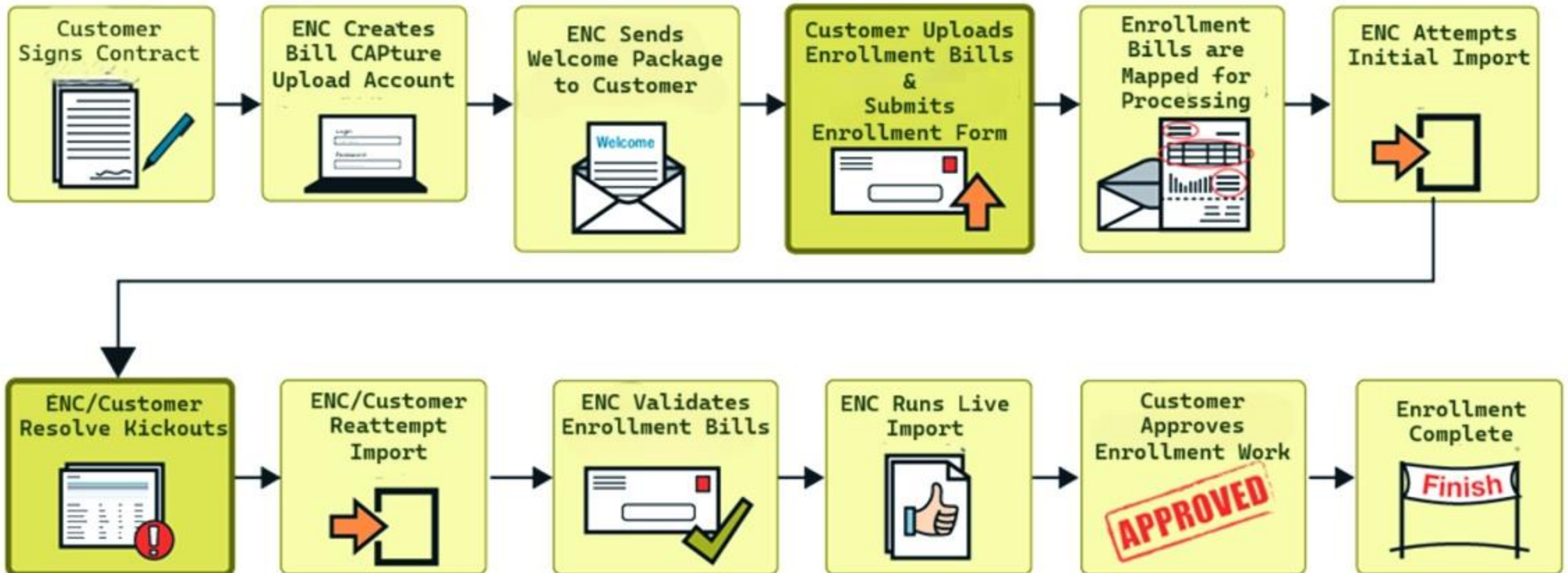


DataCAP // EDI 810



Bill CAPture Enrollment

Enrollment Process



Bill CAPture Enrollment

Welcome Email from ENC

One month of PDF bills

Confirmation of handing instructions

Mapping & Configurations

Account & Meter Setup

Test Import & QC

Sign off & Go Live

[illegible]

	A	B	C	D	E	F	G
1	Account Code	Account Name	Service Address Street1	Service Postal Code	Vendor Type	Vendor Code	Commodity
	<i>*Required for Account</i>	<i>*Required for Account</i>	<i>Optional for Account</i>	<i>*Required for Account if Country is not Other</i>	<i>*Required for Account</i>	<i>*Required for Account and Meter</i>	<i>*Required for Meter</i>
2	50 Characters	50 Characters	32 Characters	10 Characters	20 Characters	16 Characters	32 Characters
28	4000000000	4000000000 - NAT	4000 COLUMBIA PARK BLVD C	59079 1200	Full Service	ATWIS	Natural Gas
29	7000 9000 07	7000 9000 07 - EL	2 DOWNE LN	59001	Full Service	B&E	Electric
30	0000000000	0000000000 - EL	10000 BAKER LN	59008	Full Service	B&E	Electric
31	0000000000	0000000000 - EL	10000 BAKER LN	59008	Full Service	B&E	Electric
32	000000 00000	000000 00000 - WAT	1 WARD PLACE		Full Service	PUBLICO	Water
33	000000 00	000000 00 - NAT	2200 MANUFACTURERS BLVD NE	59001 0001	Full Service	CENTERPOINT	Natural Gas
34	000000 00	000000 00 - NAT	2200 MANUFACTURERS BLVD	59001	Full Service	CENTERPOINT	Natural Gas
35	40000	40000 - NAT	10000 ROBERTS BLVD	59008	Supply Only	CENTERPOINT	Natural Gas
36	0000000000	0000000000 - NAT	3000 JORDY PARK	59001	Full Service	CHARTAS	Natural Gas
37	0000000000	0000000000 - NAT	3000 JORDY PARK	59001	Full Service	CHARTAS	Natural Gas
38	0000 0000 00	0000 0000 00 - WAT	UNAPPROPRIATE		Full Service	ALBANY	Water
39	0000 00	0000 00 - WAT	UNAPPROPRIATE		Full Service	CHARTANCOGA	Water
40	0000 00	0000 00 - WAT	UNAPPROPRIATE		Full Service	CHARTANCOGA	Water
41	400000 400000	400000 400000 - WAT	3000 10 N DAK PARK AVE	59007	Full Service	CHICAGO	Water
42	700000 700000	700000 700000 - WAT	1100 W BLACKHAWK ST UNIT L.F.	59042	Full Service	CHICAGO	Water
43	700000 400000	700000 400000 - WAT	1100 W BLACKHAWK ST UNIT M.F.	59042	Full Service	CHICAGO	Water
44	700000 400000	700000 400000 - WAT	1100 W BLACKHAWK ST UNIT L.F.	59042	Full Service	CHICAGO	Water
45	00 0000 00	00 0000 00 - WAT	2 DOWNE RD		Full Service	CLINTON	Refuse
46	00 0000 00	00 0000 00 - WAT	2 DOWNE RD		Full Service	CLINTON	Water
47	00 0000 00	00 0000 00 - WAT	2 DOWNE RD	59001	Full Service	CLINTON	Refuse
48	00 0000 00	00 0000 00 - WAT	2 DOWNE RD	59001	Full Service	CLINTON	Water
49	000 000 400 0 0	000 000 400 0 0 - EL	1 DOWNE RD SIGNAL OPERATIONS	70000 0000	Full Service	CLINTON	Electric

Web CAPture Enrollment

Credentials & Account List provided

Automation configurations

Initial bill download confirmed

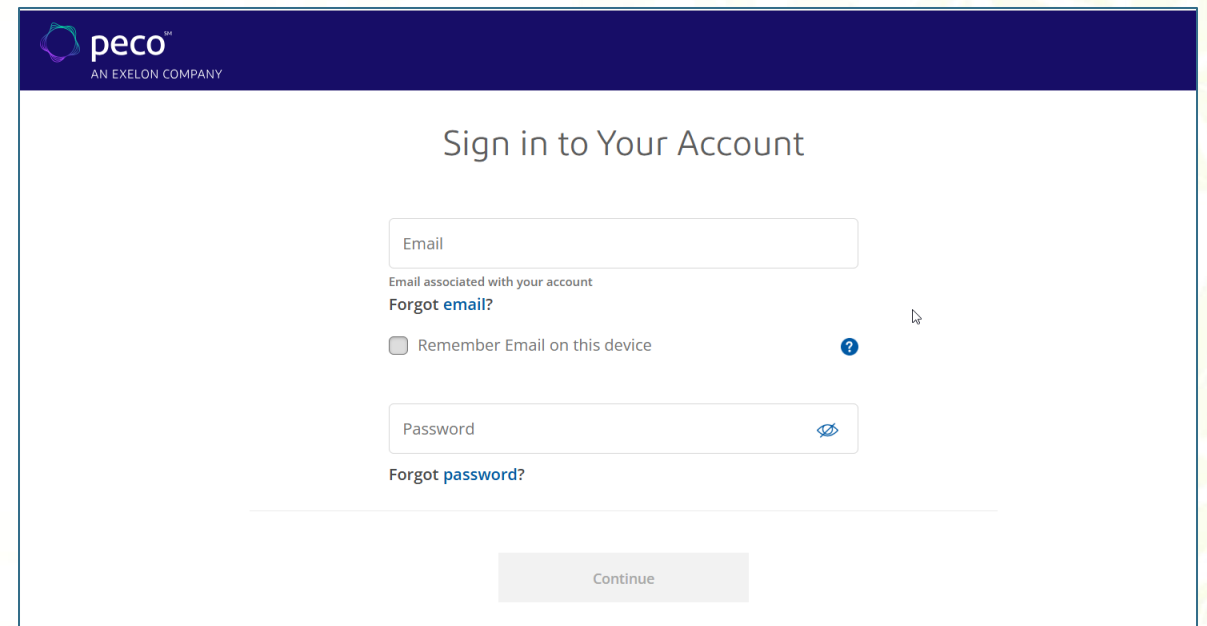
Mapping & Configurations

Test import & QC

Sign Off & Go Live

Enablement:

- Activating & De-activating
- Timing of bill download



The screenshot shows the Peco login page. At the top is the Peco logo with the text 'AN EXELON COMPANY'. Below the logo is the heading 'Sign in to Your Account'. There are two input fields: 'Email' and 'Password'. Below the 'Email' field is a link 'Forgot email?'. Below the 'Password' field is a link 'Forgot password?'. There is a checkbox labeled 'Remember Email on this device' with a question mark icon to its right. At the bottom is a 'Continue' button.

pecoSM
AN EXELON COMPANY

Sign in to Your Account

Email

Email associated with your account
[Forgot email?](#)

☐ Remember Email on this device [?](#)

Password [?](#)

[Forgot password?](#)

Continue

DataCAP Enrollment: EDI 810

Welcome Email from ENC

Forms to complete:

- ✓ Letter of Authorization
- ✓ Trading Partner Agreement
- ✓ Partner Profile (SFTP)

EDI 810 Sample & Implementation Guide

Mappings & Configurations

SFTP Setup & Testing

Test Import & Review

Sign Off & Go Live

```
ST*810*003880001
BIG*20110125*INVOICE NUMBER*20110125*PO NUMBER
CUR*BT*USD
N1*BT*Lenmar
N3*4035 Via Pescador
N4*Camarillo*CA*930125050*US
PER*OC*RemitToContact*TE*RemitToPhone
N1*BT*Lenmar
N3*4035 Via Pescador
N4*Camarillo*CA*930125050*US
PER*OC*RemitToContact*TE*RemitToPhone
N1*BT*Vendor Address
N3*Vendor Address 2
N4*PHOENIX,*AZ*85043*US
N1*ST*Vendor Address
N3*Vendor Address 2
N4*PHOENIX,*AZ*85043*US
ITD*01*3***20110326*60
IT1*11*6*EA*3.20*NT*VN*SupplierSku*IN*PartnerSku*UP*Q9929546
PID*F***ItemDescription
TDS*2280
CTT*1*6
SE*14*0038800
```

1400 N Lincoln Ave - ELE

1635011000

1400 N Lincoln Ave, Happy Valley, PA 12345, United States

PA Gas Electric Co.

PGE

United States

Batch

20230126_BILLCAPTURE

Account History

Timeline

Note

11/01/2022-12/02/2022

\$8,194.39

10/03/2022-11/01/2022

\$6,643.59

09/01/2022-10/03/2022

\$7,495.63

08/03/2022-09/01/2022

\$7,604.47

07/05/2022-08/03/2022

\$7,196.44

Start

11/01/2022

End

12/02/2022

Days

31

Amount due

\$8,194.39

Billing period

November 2022

Due date

12/27/2022

Statement date

12/02/2022

Control code

sample

City Hall-ELE01

CITY HALL-ELE01

Actions

Daily Use (Calendarized)

2,626.400 kWh

↑ 42.2%

Daily Cost (Calendarized)

\$263.75

↑ 40.2%

Basic Charge

Customer Charge

\$

45.00

System Usage Charge

Info Use

81600 kWh

\$

819.26

Off-Peak Usage

Off Peak Use

27600 kWh

\$

917.42

On-Peak Usage

On Peak Use

54000 kWh

\$

2604.96

Generation Demand Charge

Generation Billed Demand

185 kW

\$

865.80

Off-Peak Demand

Off Peak Demand

231 kW

\$

0.00

Total Cost

\$

8194.39

DataCAP Enrollment: CSV, XLSX, XLS, TXT, & XML

Welcome Email from ENC

Sample file and accessory documentation

Confirmation of delivery

Mappings and Configurations

Delivery Setup and Testing

Test Import and Review

Sign Off and Go Live

```
<?xml version="1.0" encoding="UTF-8"?>
<EmployeeData>
  <employee id="34594">
    <firstName>Heather</firstName>
    <lastName>Banks</lastName>
    <hireDate>1/19/1998</hireDate>
    <deptCode>BB001</deptCode>
    <salary>72000</salary>
  </employee>
  <employee id="34593">
    <firstName>Tina</firstName>
    <lastName>Young</lastName>
    <hireDate>4/1/2010</hireDate>
    <deptCode>BB001</deptCode>
    <salary>65000</salary>
  </employee>
</EmployeeData>
```



	AccountCode	StartDate	EndDate	A/C/E	VENDORCODE	DUE DATE	CONTROL CODE	USE:KWH:Electric Usage	DEMAND:KW:Electric Demand	CHARGE:USDOLLARS:Cost
1	12345-09995	20110701	20110801	A	ELELOCAL	20110816	107808820	3983211	5993	219985.19
2	12345-09995	20110801	20110901	A	ELELOCAL	20110916	250350511	3893899	5860	222456.97
3	12345-09995	20110901	20111001	A	ELELOCAL	20111016	662314443	3522684	5308	225499.63
4	12345-09995	20111001	20111101	A	ELELOCAL	20111116	804474826	3042992	4594	230680.06
5	12345-09995	20111101	20111201	A	ELELOCAL	20111216	352578543	3107560	4690	225494.37
6	12345-09995	20111201	20120101	A	ELELOCAL	20120116	73763808	4002335	6021	198282.46
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9	12345-09995	20120301	20120401	A	ELELOCAL	20120416	347485659	2961438	4472	272651.25
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11	12345-09995	20120501	20120601	A	ELELOCAL	20120616	152116463	3184985	4805	252677.73
12	12345-09995	20120601	20120701	A	ELELOCAL	20120716	835037114	3799800	5720	188365.95
13	12345-09995	20120701	20120801	A	ELELOCAL	20120816	566381323	3079231	4648	228458.08
14	12345-09995	20120801	20120901	A	ELELOCAL	20120916	347088883	2652243	4012	277768.4
15	12345-09995	20120901	20121001	A	ELELOCAL	20121016	766211372	3749406	5645	175760.82
16	12345-09995	20121001	20121101	A	ELELOCAL	20121116	641702527	3702011	5574	203263
17	12345-09995	20121101	20121201	A	ELELOCAL	20121216	702895942	2665286	5520	174522.72

Post go live

- ENC Support
- Help Center
- Eco Champions
- Customer Success Manager
- Strategic Account Manager

See it live

Q & A

CATALYST

Thank you!

CATALYST

We'd love to hear your thoughts!

Take a moment to share your feedback
for this session in the **Sched app**.

Your input helps us make future events even better.