



I didn't know I could do that?!?

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- ✓ Reassign Accounts to Vendor
- ✓ Move & Delete objects
- ✓ Update Accounts Numbers & Meter serials
- ✓ Move bills
- ✓ Update bill headers
- ✓ Commodity categories
- ✓ Create custom commodities
- ✓ Create units of measure

Let's go to the app....

ReCAP

Reassign Accounts to Vendors

Accounts can be reassigned to a different vendor. This will update the data on the account to be attributed to the new vendor.

****New suppliers are brand new accounts & vendors – should not have accounts reassigned from ‘old’ suppliers**

The screenshot displays a web application interface for the City of Green Shamrock. On the left is a dark sidebar with a vertical list of vendor categories, each preceded by an icon. The main content area is titled 'City of Green Shamrock [CITYOFGRESHAM]' and contains a horizontal navigation bar with tabs: 'Overview', 'Accounts', 'Properties', and 'Reassign Accounts'. The 'Reassign Accounts' tab is highlighted with a red rectangular box. Below the navigation bar, there is a 'New Vendor' section featuring a dropdown menu currently set to 'Clark Public Works' and a 'Move Selected Account(s)' button. To the right of this button is a text instruction: 'Choose new Vendor, select Account(s) and click to move'. Below the vendor selection is a table titled 'Accounts - 1'. The table has three columns: 'Account Number', 'Account Name', and 'Service address'. A single row is visible in the table with the following data: Account Number 'B 98479063', Account Name '2701 Parkway West - WAT SEW STO', and Service address '2701 Parkway West Happy Valley, PA 12345'.

Account Number	Account Name	Service address
<input type="checkbox"/> B 98479063	2701 Parkway West - WAT SEW STO	2701 Parkway West Happy Valley, PA 12345

Move & Delete Objects

Objects, such as accounts, cost centers, meters, buildings, and organizations can easily be moved by selecting from list and reassigning. These objects can also be deleted by selecting and clicking 'delete'.

The screenshot displays the 'All Meters' interface. On the left is a sidebar with a navigation menu under 'Buildings & Meters'. The main area shows a table of meters with columns for Meter, Topmost place, Meter group, and Commodity. Three meters are selected, indicated by checkboxes. Above the table, there are buttons for 'Delete' and 'Move'. At the top right, there is an 'Add Meter' button. Below the table, there is a pagination link '1-17 of 17 meters' and a footer with links for 'Learn more about managing meters' and 'Use setup spreadsheets to edit multiple meters'.

Buildings & Meters

- Facilities [FACILITIES]
 - > City of Happy Valley [HAPP...]
 - > EcoChampions [ECOCHAM...]
 - > EnergyCAP, LLC [ENERGYC...]
 - > Global Manufacturing Solut...
 - > GMS North America [G...]
 - > Bellefonte Plant [25]
 - Bellefonte Plan...
 - Bellefonte Plan...
 - Bellefonte Plan...
 - Bellefonte Plant - ...
 - Bellefonte Plant - ...
 - Bellefonte Plant - ...
 - > North America Head...
 - > North Toronto Wareh...
 - > West Toronto Wareh...

All Meters Add Meter

Meter Topmost place Meter group Commodity

Search by name 3rd & West Parking Search meter groups All Commodities Reset Filters

3 meters selected Delete Move

<input type="checkbox"/>	3rd & West Parking Garage-CO...	3rd & West Parking Garage	Compost	Inactive	
<input checked="" type="checkbox"/>	3rd & West Parking Garage-ELE...	3rd & West Parking Garage	Electric	Active	
<input checked="" type="checkbox"/>	3rd & West Parking Garage-ELE...	3rd & West Parking Garage	Electric	Active	
<input type="checkbox"/>	3rd & West Parking Garage-ELE...	3rd & West Parking Garage	Electric	Active	
<input type="checkbox"/>	3rd & West Parking Garage-ELE...	3rd & West Parking Garage	Electric	Active	
<input type="checkbox"/>	3rd & West Parking Garage-ELE...	3rd & West Parking Garage	Electric	Active	
<input checked="" type="checkbox"/>	3rd & West Parking Garage-NG...	3rd & West Parking Garage	Natural Gas	Active	
<input type="checkbox"/>	3rd & West Parking Garage-RE...	3rd & West Parking Garage	Recycle	Inactive	
<input type="checkbox"/>	3rd & West Parking Garage-REF...	3rd & West Parking Garage	Refuse	Inactive	

1-17 of 17 meters

[Learn more about managing meters](#) [Use setup spreadsheets to edit multiple meters](#)

Update Account Numbers & Meter Serials

Account and Meter Serial numbers can be updated, or changed, while retaining the previous account or meter serial numbers. These most recent two, with effective date of change, can be viewed in the update sheet.

Accounting / EnergyCAP, LLC

360 Discovery Drive - ELE [100 133 338 556]

Actions Reports

Bills Billing Period Data Properties Flags

Account Chargebacks

▼ Linked Meters - 1

Meter	Serial number	Parent locat...	Rate sched...	Effective
DISTRIBUTION AND SUPPLY				
> Energy...	EnergyCAP General Po...	since 01/01...		

> Linked Summary or Sub Accounts - 0

Create relationships between accounts with summary and sub accounts. [Get started.](#)

360 Discovery Drive, Boalsburg, PA 16827, United States

Vendor
West Penn Power

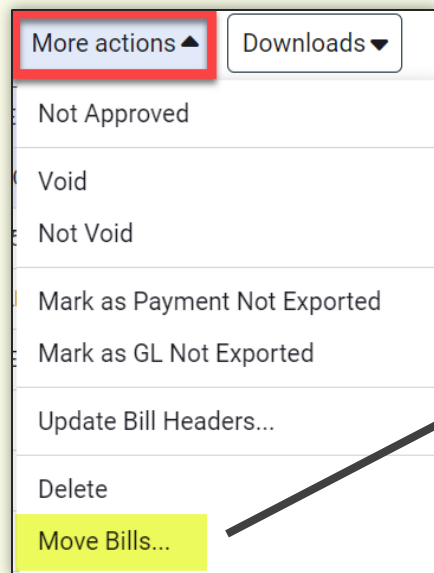
Service effective
—

Edit

Move Bills

Bills can be moved to a different account-meter by selecting the bill from the account bill list, choosing move bills, and then identifying the destination account and meter from the dropdowns.

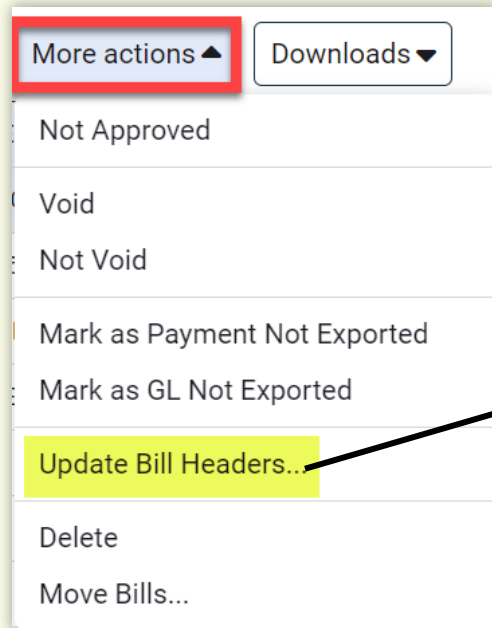
**** Notes:** Can only move bills to 'like' commodities or families.
Can NOT move bills from meter bill list; must be account or bills module.



A screenshot of the 'Move Bills' dialog box. It has a title bar with 'Move Bills' and buttons for 'Cancel' and 'Move'. Below the title bar is an information icon and a message: 'CarbonHub records generated from selected bills will be moved if the destination meter is linked to an emissions source. Otherwise, they will be deleted.' Below this is a section titled 'Destination account is required' with a yellow search bar labeled 'Search accounts'. Below that is a section titled 'Destination meter' with a dropdown menu labeled 'Select destination account'. At the bottom, there are three checkboxes: 'Update each meter GL Record on the moved bills to reflect the destination meter GL Records', 'Update the account GL Record on the moved bills to reflect the destination account GL Record', and 'Update scope category and GHG factor of each record generated from the moved bills to match the default scope category and GHG factor of the emissions source linked to the destination meter (if applicable)'. A help icon (?) is in the bottom right corner.

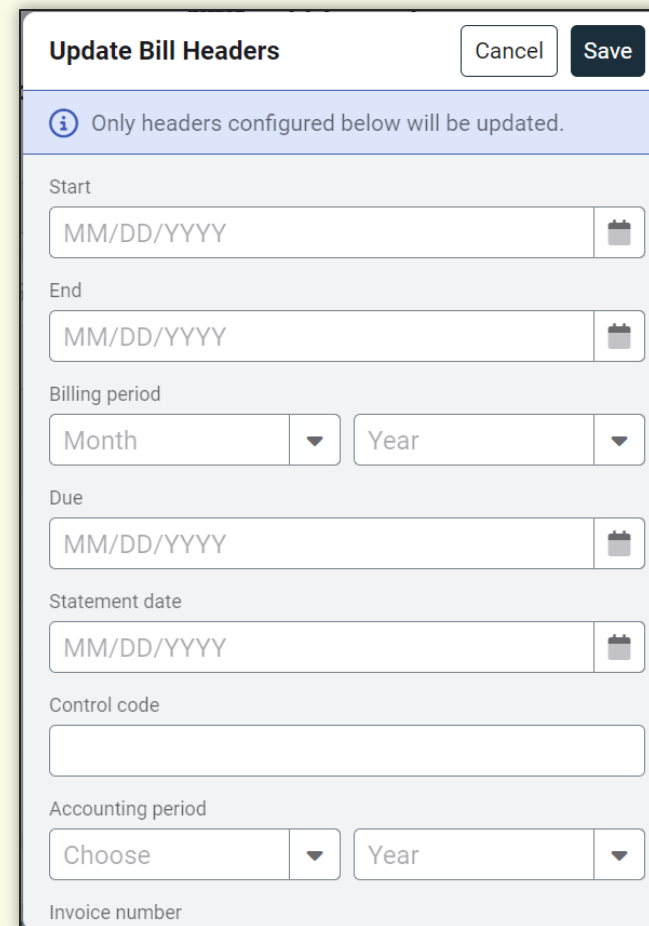
Update Bill Headers

Bills headers, such as billing period, statement date, and due date can be updated by selecting the bill(s) from the account bill list, choosing update bill headers, and then populating the fields to update.



A screenshot of a context menu for a bill list. The menu is open, showing several options. The 'More actions' button at the top is highlighted with a red rectangle. Below it, the 'Update Bill Headers...' option is highlighted with a yellow background. An arrow points from this option to the 'Update Bill Headers' form on the right.

- More actions ▲
- Downloads ▼
- Not Approved
- Void
- Not Void
- Mark as Payment Not Exported
- Mark as GL Not Exported
- Update Bill Headers...
- Delete
- Move Bills...



A screenshot of the 'Update Bill Headers' form. The form has a title bar with 'Update Bill Headers', 'Cancel', and 'Save' buttons. Below the title bar is a blue information bar that says 'Only headers configured below will be updated.' The form contains several fields for updating bill headers:

- Start: MM/DD/YYYY
- End: MM/DD/YYYY
- Billing period: Month (dropdown), Year (dropdown)
- Due: MM/DD/YYYY
- Statement date: MM/DD/YYYY
- Control code: (text input)
- Accounting period: Choose (dropdown), Year (dropdown)
- Invoice number: (text input)

Commodity Categories

Commodities can be grouped in categories for filter commodity families in reports and dashboards.

The image shows a software interface for managing 'Commodities and Units'. On the left is a sidebar menu with the following items: System Settings, Subscription Details, Users and Roles, Data Reporting Settings, **Commodities and Units** (highlighted in yellow), Cost Categories, Target Comparison Settings, Send Notification to Users, Default Notification Settings, and Setup Spreadsheets Log. A red square icon with a gear symbol is at the bottom of the sidebar. An arrow points from the 'Commodities and Units' menu item to the main content area.

The main content area is titled 'Commodities and Units' and contains a table with columns 'Commodity' and 'Category'. The table lists several categories: 'ELECTRICITY' (with a lightning bolt icon and 'Electric' commodity), 'Lighting' (with a lightbulb icon), and 'Solar PV' (with a solar panel icon). Below these, there are sections for 'NEW' (with 'gal' unit), 'NEW UNIT' (with 'CCF' unit), and 'ROCKET' (with 'Count' unit). Each of these sections has the text 'No commodities associated with this category.'

An 'Edit Commodity' modal is open in the center. It has a 'Cancel' button and a 'Save' button. The modal contains the following fields:

- Name: 'Electric' (in a greyed-out field)
- Abbreviation: 'ELE' (in a greyed-out field)
- Icon: A lightning bolt icon (in a greyed-out field)
- Description: An empty text area
- REPORTING AND ROLLUPS section:
 - Category: 'Electricity' (in a yellow highlighted dropdown menu)
 - Rollup unit: 'kWh' (in a greyed-out field)

At the top right of the main content area, there are buttons for 'Add Category', 'Add Commodity', and 'Reset', along with an 'Actions' dropdown and a 'Done' button.

Create Custom Commodities

Custom commodities can be created to track a variety of 'custom' commodities, including, but not limited to pizza slices.

The image shows a software interface for managing commodities and units. On the left is a sidebar menu with the following items: System Settings, Subscription Details, Users and Roles, Data Reporting Settings, **Commodities and Units** (highlighted in yellow), Cost Categories, Target Comparison Settings, Send Notification to Users, Default Notification Settings, and Setup Spreadsheets Log. A red square highlights a gear icon at the bottom of the sidebar, with an arrow pointing from the 'Commodities and Units' menu item to it. The main area is titled 'Commodities and Units' and contains a table with columns for 'Commodity' and 'Category'. The table lists several categories: 'NEW', 'NEW UNIT', 'ROCKET', 'SEWER', and 'TRAVEL'. Each category has a message: 'No commodities associated with this category.' or 'No commodities associated with this category that'. The 'SEWER' category has a sub-item 'Storm Drainage'. An 'Add Commodity' modal is open in the center, with fields for 'Name' (with a warning icon), 'Abbreviation', 'Icon', 'Description', 'Category' (with a dropdown), and 'Rollup unit' (with a dropdown). The modal also has a checkbox for 'This commodity can be converted to energy.' and buttons for 'Cancel' and 'Save'. In the background, there are buttons for 'Add Category', 'Add Commodity', and 'Reset'.

Create Units of Measure

Create units for tracking data that may be unique or not available in system defaults.

- Created and managed via spreadsheet
- Commodities and Units module

Unit ID	Unit name	Unit code	Unit symbol	Unit Category and Primary Unit	Conversion to Primary Unit for the selected category	Delete unit
	Add or edit a unit name <i>(required)</i>	Add or edit a unique unit code <i>(required)</i>	Add a unique unit symbol for each unit name <i>(required)</i>	Use the cell drop-down to select. The category primary unit will autopopulate. <i>(required)</i>	Multiplier <i>(required)</i>	Select DELETE from the drop-down to remove a unit
1024	Block (100kWh)	BLOCK	Block (100kWh)	Energy kWh	100	
1025	Lifts	LIFTS	Lifts	Counter Value		
1027	Million LBs	MMLB	Million LBs	Weight lb	1000000	
1028	Refrigeration Ton	REFRIGTON	Refrigeration Ton	Rate of Energy Btu/h	12000	

Questions?

Take the session survey:
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