

Chargebacks

CATALYST 



Today's ground rules

Lectures are boring – **discussions** are WAY better!

Ask questions

Help each other – share your experiences and ideas

Participate and **provide feedback!**

What is a chargeback bill?

A chargeback bill is **generated in EnergyCAP**. It's not a bill you get from a utility vendor.

Other names for chargebacks include:

- Bill splits
- Cost allocations
- Campus distributions
- Bill calculations
- Tenant allocations

EnergyCAP chargeback bills can be created as **cost-only**, **use-only**, or **cost and use bills**



Common reasons for chargebacks

Cost allocation of vendor bills to **multiple departments**

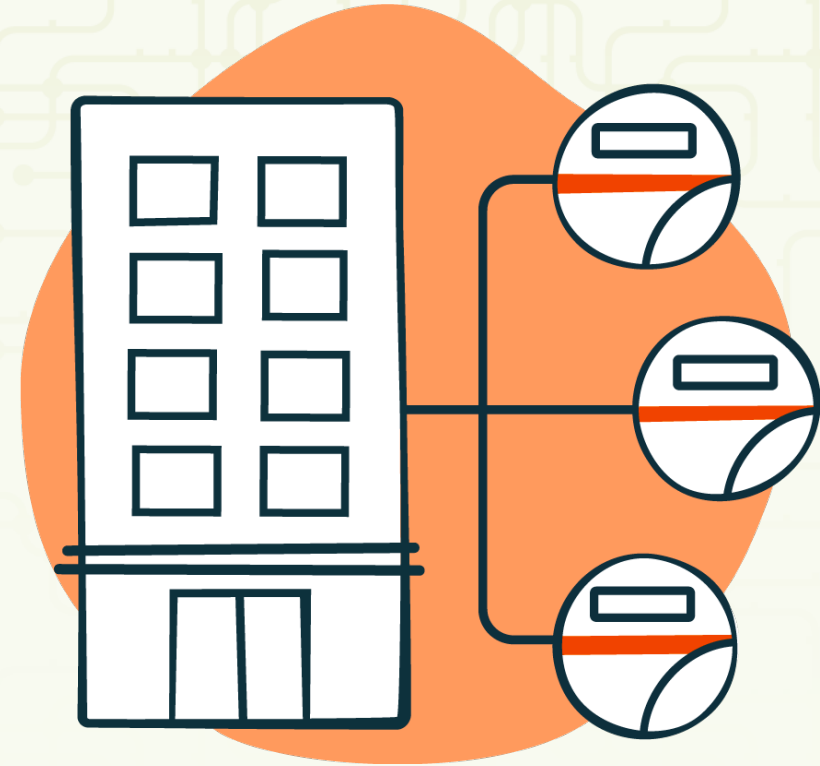
Assign utility costs to specific **projects, grants, and special activities**

Create bills for **tenants**

Energy plant calculations and **campus distribution** tracking

True-up financial transactions

Detailed **facility tracking and reporting**
(e.g., ENERGY STAR, greenhouse gas reporting)



Why does your organization create chargebacks?

**What is your experience
with chargebacks?**



Mastering chargebacks with EnergyCAP

EnergyCAP chargebacks simplify your monthly workflow

Bill splits and calculations are flexible and easy to configure

Bill Calculations

Bill Splits

Chargeback workflows ensure consistency with step-by-step instructions and built-in documentation tailored to your organization

EnergyCAP includes easy options for chargeback setup and maintenance



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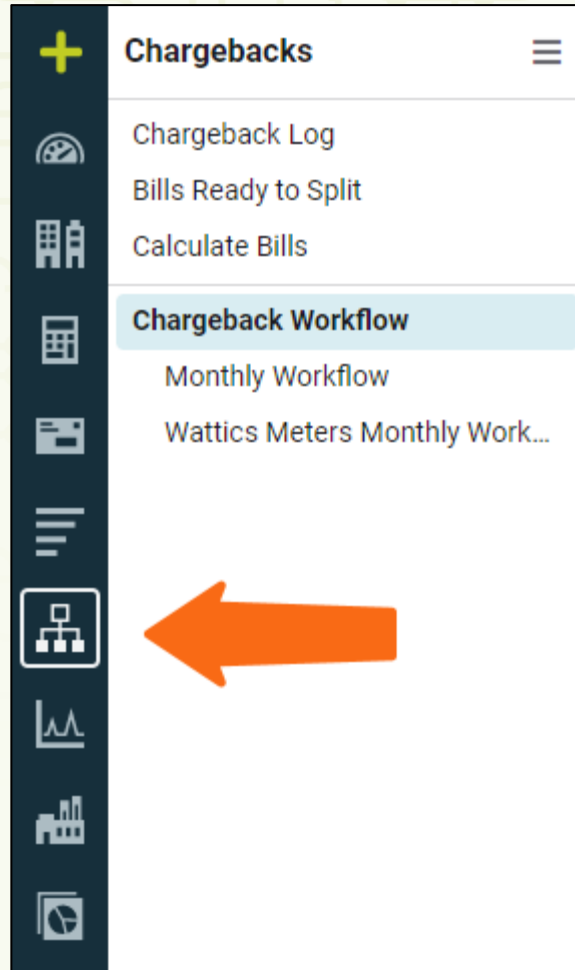
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Chargebacks Module



Chargebacks is a licensed feature.

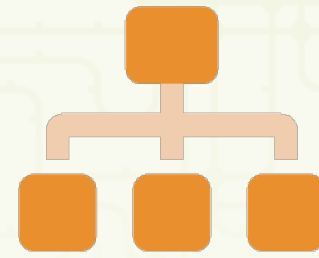
If licensed, the Chargebacks module appears in the module menu on the left-hand side.

If unlicensed, and this functionality is needed, contact your EnergyCAP Sales Account Manager.

EnergyCAP chargebacks are built on three simple, but powerful, features



Bill Calculations
(setup on Meter)



Bill Splits
(setup on Account)

Chargeback Workflows

EnergyCAP chargebacks are built on three simple, but powerful, features

Bill calculations – create a new bill with your own custom calculations
submeters, custom rates, fixed costs, combine bills, and more!

Bill splits – divide any existing bill into one or more smaller bills
percentage splits, dynamic floor area allocation, loss/remainder assignment

Chargeback workflows – organize groups of bill splits and calculations
together into **repeatable monthly steps**

Chargeback calculations can always be rolled-back!



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Bill Calculations

Meters configured to generate bills based on use, cost, and demand calculations

Bill calculations allow for independent use/cost calculations

**Use
Calculation**

**Cost
Calculation**



Bill Calculations



CALCULATING USE

- Channel readings
- Fixed amount
- Copy the use from another meter
- Summary calculation



Bill Calculations



CALCULATING USE

- Channel readings
- Fixed amount
- Copy the use from another meter
- Summary calculation
- **Wattics data point**

New



Bill Calculations



CALCULATING USE

- Channel readings
- Fixed amount
- Copy the use from another meter
- Summary calculation
- Wattics data point

CALCULATING COST

- Use x rate schedule
- Use x fixed unit cost
- Use x unit cost from another meter
- Fixed amount
- Copy cost from another meter
- Summary calculation

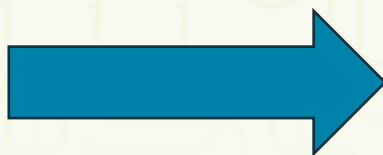


Bill Calculations



CALCULATING USE

- Channel readings
- Fixed amount
- Copy the use from another meter
- Summary calculation
- Wattics data point



CALCULATING COST

- Use x rate schedule
- Use x fixed unit cost
- Use x unit cost from another meter
- Fixed amount
- Copy cost from another meter
- Summary calculation



Bill Calculations // Setup starts at the **meter** to receive the new bill

Bill Calculation SetupDone

Bill Calculation Version

Meter

EnergyCAP HQ - ELE01

Account

360 Discovery Drive - ELE

Version

Original

Workflow step

Not Configured

Effective

since January 2010

Edit Version

Use

Configure how use is calculated for the meter. Create a cost only bill by setting the fixed amount to zero.

Both use and cost are required to perform calculations.

Edit Use

Cost

Configure the cost source for this meter.

Both use and cost are required to perform calculations.

Edit Cost

Demand

Configure how demand is calculated.

Edit Demand

Other Charges



Meter line items and account line items let you add lines to the bill.

Edit Meter Lines


Edit Account Lines



Bill Calculations // Use Configuration

| | | | | |
|--|---|---------------------|---------------------------------|---------------------------------|
| Meter  Twin Pines Mall-ELE01 | Account  1060 Twin Pines Blvd - ELE | Version Original | Workflow step Not Configured | Effective since January 2010 |
|--|---|---------------------|---------------------------------|---------------------------------|


Use source

☐ Wattics data point 

Choose

[Edit link to Wattics data point](#)

☒ Channel readings

 Choose ▼

☐ Fixed amount

Choose ▼

☐ Copy use from another meter

%

Choose ▼



☐ Calculation

Sum use from + ▼
Meters or meter groups

Subtract use from + ▼
Meters or meter groups



Bill Calculations // Cost Configuration

| | | | | |
|--|---|---------------------|---------------------------------|---------------------------------|
| Meter  Twin Pines Mall-ELE01 | Account  1060 Twin Pines Blvd - ELE | Version Original | Workflow step Not Configured | Effective since January 2010 |
|--|---|---------------------|---------------------------------|---------------------------------|

Cost source

☒ Use × rate schedule linked to this meter

83 Gen 3Ph

☐ Use × fixed unit cost

\$ / Choose

☐ Use × unit cost from another meter

Choose

☐ Fixed amount

\$

☐ Copy cost from another meter

%
Choose

☐ Calculation

Sum cost from +

Meters or meter groups

Subtract cost from +

Meters or meter groups



Bill Calculations // Cost Configuration

| | | | | |
|----------------------------------|---|---------------------|---------------------------------|---------------------------------|
| Meter ⚡ Twin Pines Mall-ELE01 | Account 🏠 1060 Twin Pines Blvd - ELE | Version Original | Workflow step Not Configured | Effective since January 2010 |
|----------------------------------|---|---------------------|---------------------------------|---------------------------------|

Cost source

☒ Use \times rate schedule linked to this meter
83 Gen 3Ph

☐ Fixed amount
\$

☐ Calculation
Sum cost from + ▾
Meters or meter groups
Subtract cost from + ▾
Meters or meter groups

☐ Use \times fixed unit cost
\$ / Choose ▾

☐ Copy cost from another meter
%
Choose ▾

☐ Use \times unit cost from another meter
Choose ▾



Bill Calculations // Demand Configuration

Edit Demand for Bill Calculation

CancelSave

| | | | | |
|----------------------------------|---|---------------------|---------------------------------|---------------------------------|
| Meter ⚡ Twin Pines Mall-ELE01 | Account 🏠 1060 Twin Pines Blvd - ELE | Version Original | Workflow step Not Configured | Effective since January 2010 |
|----------------------------------|---|---------------------|---------------------------------|---------------------------------|

Demand source

☐ Wattics data point ⓘ

Choose

[Edit link to Wattics data point](#)

☐ Not configured

☒ Channel readings

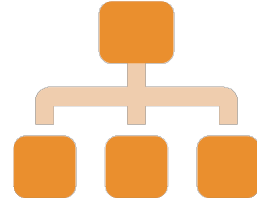
* Choose ▼

☐ Fixed amount

Choose ▼



What types of use and cost calculations do you use today?



Bill Splits

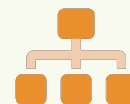
Accounts configured to divide existing bills to one or more destination meters

Bill Splits - three flexible options



BILL SPLIT OPTIONS

- **Static** – fixed percentages
- **Dynamic** – automatic percentages based on floor area (always 100% split)
- **Advanced** – automatic percentages based on proportional cost/use (always 100% split)



**When would you use each
of the three split types?**




Bill Splits // Setup begins on the **account** to be split

Bill Split Setup


Done

✓ Bill Split Version

Master account

 Central Plant Output - CHW01

Master meter

 Central Plant Output - CHW01

Version

Original

Workflow step

Not Configured

Effective

since January 2010

 Edit Bill Split Version

Bill Split

Configure the bill split percentages. Three types are available:

- Static percentages are manually entered and are not required to total 100%
- Dynamic percentages are calculated based on building area and will always total 100%
- Advanced bill split distributes costs from and to groups of meters

 Edit Bill Split

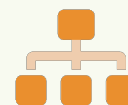
Split method

Static percentage

Static percentage

Dynamic percentage based on area

Advanced bill split



Bill Splits // Options vary based on split type

Split method
Static percentage ▼

Recipients Share = 0% +

* Choose ▼ * Choose % ✕

Split method
Dynamic percentage based on area ▼

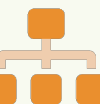
Recipients Share +

* Choose ▼ Choose ft² × 1 ✕







Split method
Advanced bill split ▼

Recipients







* Choose ▼ Split source cost ▼ Share based on recipients' cost ▼









Chargebacks Icons

| Chargeback Type | Accounts | Meters |
|------------------------|---|---|
| Bill Calculation |  |  |
| Bill Split Source |  |  |
| Bill Split Destination |  |  |







Chargebacks Icons

| Chargeback Type | Accounts | Meters |
|-----------------|---|---|
| |  |  |
| |  |  |
| |  |  |







Chargebacks Icons

| Chargeback Type | Accounts | Meters |
|---|---|---|
| Bill Calculation & Bill Split Master |  |  |
| |  |  |
| |  |  |

Chargebacks Icons

| Chargeback Type | Accounts | Meters |
|---|---|---|
| Bill Calculation & Bill Split Master |  |  |
| Bill Split Master & Receiver |  |  |
| |  |  |

Chargebacks Icons

| Chargeback Type | Accounts | Meters |
|---|---|---|
| Bill Calculation & Bill Split Master |  |  |
| Bill Split Master & Receiver |  |  |
| Bill Calculation & Bill Split Receiver |  |  |



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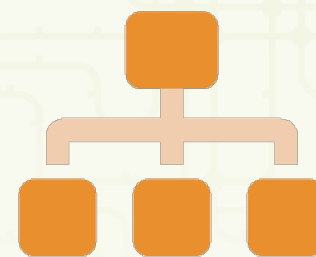
Chargeback Workflows

Bill calculations and bill splits organized into **step-by-step actions** for processing

Chargeback workflows **SIMPLIFY** your chargeback process



Bill Calculations
(setup on Meter)



Bill Splits
(setup on Account)

Chargeback Workflows

Features of EnergyCAP chargeback workflows

Provide **order, structure,** and **documentation** to your chargeback process

Step-by-step guide to process and verify chargeback bills

Group similar chargebacks together for easy processing
(e.g., vendor bill splits, submeter calculations, energy plant distributions)

Flexible—configure as many workflows and steps as you need

Increase visibility across your team

Easily reversible

Configure workflow steps based on your monthly process

Edit Chargeback Workflow

Cancel

Save

Name

Tenant Billing

Step

Description

+



1 Split Irrigation (fixed percentages)

Split reclaimed water used for irrigation across properties - fixed percentages based on lot size

Split



2 Split Outdoor Lighting (dynamic percentages)

Split common electric use: pavilion and outdoor lighting - dynamic percentages based on floor area

Split



3 Calculate Steam Plant Output/Cost

Calculate plant output based on readings and aggregate input costs

Calculate



4 Calculate Steam Use per Building

Calculate building-by-building use based on steam readings

Calculate



5 Calculate Steam Losses

Calculate the difference between produced steam and measured tenant steam use

Calculate



6 Allocate Steam Losses Proportionally

Proportionally distribute steam losses back to tenants based on monthly measured steam use

Split



Follow the workflow steps each month—analyze results as you go

Monthly Electric Workflow



Done

Billing period

March



2022



1 2 3 4 5

1 Combine vendor bills

Combine vendor bills together for monthly use/cost



| Meter | This step | Mar 2022 | Use | Mar 2021 | Feb 2022 | Unit Cost | Cost |
|------------|-----------|----------|------------------|----------|----------|--------------|---------------|
| Vendor Sum | 1 bill | 1 bill | 1,600,000.00 kWh | | ▲ 39 % | \$ 0.125/kWh | \$ 200,000.00 |

| Batch | Succe... | Flags | Errors |
|--------------------------------|----------|-------|--------|
| 20220412_094432_Calculation... | 1 bill | | |

2 Submeter bills

Calculate monthly bills based on park submeters



| Meter | This step | Mar 2022 | Use | Mar 2021 | Feb 2022 | Unit Cost | Cost |
|--------------|-----------|----------|----------------|----------|----------|--------------|--------------|
| Submeter: B: | 1 bill | 1 bill | 500,000.00 kWh | | 0 % | \$ 0.125/kWh | \$ 62,500.00 |
| Submeter: Di | 1 bill | 1 bill | 690,000.00 kWh | | ▲ 97 % | \$ 0.125/kWh | \$ 86,250.00 |
| Submeter: Ki | 1 bill | 1 bill | 380,000.00 kWh | | ▲ 52 % | \$ 0.125/kWh | \$ 47,500.00 |

| Batch | Succe... | Flags | Errors |
|--------------------------------|----------|------------|--------|
| 20220412_095016_Calculation... | 1 bill | | |
| 20220412_094437_Calculation... | 2 bills | 1 error... | |

3 Loss/Remainder

Difference between vendor bills and submeter bills









| Meter | This step | Mar 2022 | Use | Mar 2021 | Feb 2022 | Unit Cost | Cost |
|-------------|-----------|----------|------------------|----------|----------|--------------|-------------|
| Vendor Rem: | 1 bill | 1 bill | 1,600,000.00 kWh | | ▲ 39 % | \$ 0.003/kWh | \$ 4,000.00 |

| Batch | Succe... | Flags | Errors |
|--------------------------------|----------|-------|--------|
| 20220412_095354_Calculation... | 1 bill | | |

Identify billing issues, outliers, and missing data with each workflow step



1 Calculate Submeter Bills at Stores

Calculate electricity and natural gas bills for submeters at each store

| Meter | This step | Jun 2018 | Use | Jun 2017 | May 2018 | Unit Cost | Cost |
|--|-----------|----------|---------------|----------|----------|----------------|-------------|
|  SUB-SW-LA MALL-STORE A-ELE01 | 1 bill | 1 bill | 39,117.23 kWh | ▼ 15 % | ▲ 37 % | \$ 0.110/kWh | \$ 4,305.38 |
|  SUB-SW-LA MALL-STORE A-NG01 | 1 bill | 1 bill | 76.90 THERM | ▼ 56 % | ▼ 59 % | \$ 1.060/THERM | \$ 81.49 |
|  SUB-SW-LA MALL-STORE B-ELE01 | 1 bill | 1 bill | 41,814.97 kWh | ▼ 15 % | ▲ 37 % | \$ 0.110/kWh | \$ 4,602.30 |
|  SUB-SW-LA MALL-STORE B-NG01 | 1 bill | 1 bill | 92.92 THERM | ▼ 56 % | ▼ 59 % | \$ 1.060/THERM | \$ 98.47 |
|  SUB-SW-LA MALL-STORE C-ELE01 | 1 bill | 1 bill | 40,466.10 kWh | ▼ 15 % | ▲ 37 % | \$ 0.110/kWh | \$ 4,453.84 |
|  SUB-SW-LA MALL-STORE C-NG01 | 1 bill | 1 bill | 105.73 THERM | ▼ 56 % | ▼ 59 % | \$ 1.060/THERM | \$ 112.05 |

2 Calculate Common Area Bills

Subtract the submeter bills from the vendor bills to determine use/cost for common areas

| Meter | This step | Jun 2018 | Use | Jun 2017 | May 2018 | Unit Cost | Cost |
|---|-----------|----------|---------------|----------|----------|----------------|-------------|
|  LA_MALL-COMMON_AREA-ELE01 | 1 bill | 1 bill | 13,488.70 kWh | ▼ 5 % | ▲ 37 % | \$ 0.110/kWh | \$ 1,484.61 |
|  LA_MALL-COMMON_AREA-NG01 | 1 bill | 1 bill | 44.86 THERM | ▼ 49 % | ▼ 59 % | \$ 1.060/THERM | \$ 47.54 |

Quickly review the status of workflow steps—any step can be reversed and re-processed

12345

| Batch | Success | Flags | Errors |
|--------------------------------|---------|-------|-------------|
| 20230421_094835_Calculation... | 2 bills | | <div></div> |

| Batch | Success | Flags | Errors |
|---------------------------|----------|-------|-------------|
| 20230421_094841_Split_dwu | 17 bills | | <div></div> |



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Create, review, and update all chargeback settings with EnergyCAP setup spreadsheets

All chargeback configuration options are available via setup spreadsheets

Download all chargeback settings at once—helpful for team review, documentation, and making bulk updates

Easy to replicate a configuration to multiple accounts/meters

Create, review, and update all chargeback settings with EnergyCAP setup spreadsheets

| Bill Split Master (Parent) | | Static Split Percentages | Dynamic Split Percentages (based on floor area) | Advanced Split |
|------------------------------|--------------------------|----------------------------------|---|-------------------------|
| Meter | Account | Destination Meter | Destination Meter | Destination Meter Group |
| Meter Code | Account Number | Meter Code | Meter Code | Meter Group (select) |
| CENTRAL_CAMPUS-MAIN-ELE01 | CAMPUS-55021936970 | SPLT-STUDENT_UNION-FUND_A-ELE_01 | | |
| GOV-SUMMARY_METER-ELE01 | GOV-SUMMARY_METER-ELE01 | GOV-BUILDING_A-ELE02 | | |
| | | GOV-BUILDING_B-ELE01 | | |
| | | GOV-BUILDING_B-ELE02 | | |
| | | GOV-BUILDING_C-ELE02 | | |
| PROP-COMMON_AREA-ELE01 | PROP-55020012849 | | SPLT-BLDG H-COMM AREA SHR-ELE | |
| | | | SPLT-BLDG I-COMM AREA SHR-ELE | |
| | | | SPLT-BLDG J-COMM AREA SHR-ELE | |
| PROP-COMMON_AREA-NG01 | PROP-2693590024 | | SPLT-BLDG H-COMM AREA SHR-NG | |
| | | | SPLT-BLDG I-COMM AREA SHR-NG | |
| | | | SPLT-BLDG J-COMM AREA SHR-NG | |
| PROP-LA_MALL_MASTER-WS01 | PROP-4496923 | SPLT-PROP-LA MALL-STORE A-WS01 | | |
| | | SPLT-PROP-LA MALL-STORE B-WS01 | | |
| | | SPLT-PROP-LA MALL-STORE C-WS01 | | |
| PROP-MASTER_WATER/SEWER-WS01 | PROP-0304-000211.02 | | SPLT-BLDG H-WS01 | |
| | | | SPLT-BLDG I-WS01 | |
| | | | SPLT-BLDG J-WS01 | |
| STEAM_REMAINDER_SUMMARY | STEAM_REMAINDER_SUMMARY | | | Steam Submeters |
| SUB-STUDENT_UNION_ELE_01 | SUB-STUDENT_UNION_ELE_01 | | SUB-CLASSROOM_ELE_01 | |
| | | | SUB-LABORATORY_ELE_01 | |
| SUB-STUDENT_UNION_NG_01 | SUB-STUDENT_UNION_NG_01 | SPLT-STUDENT_UNION-FUND_A-NG_01 | | |
| | | SPLT-STUDENT_UNION-FUND_B-NG_01 | | |
| SUB-STUDENT_UNION_STM_01 | SUB-STUDENT_UNION_STM_01 | SPLT-STUDENT_UNION-FUND_A-STM_01 | | |
| | | SPLT-STUDENT_UNION-FUND_B-STM_01 | | |
| SUB-STUDENT_UNION_WS_01 | SUB-STUDENT_UNION_WS_01 | SPLT-STUDENT_UNION-FUND_A-WS_01 | | |
| | | SPLT-STUDENT_UNION-FUND_B-WS_01 | | |

Create, review, and update all chargeback settings with EnergyCAP setup spreadsheets

| Calculated Bill Details | | Calculated Bill Use | Calculated Bill Cost | Calculated Bill Demand | Add Meter Lines | Add Account Lines |
|----------------------------|---------------------------|--------------------------|--------------------------------------|--------------------------|--|-------------------------------|
| Meter | Account | Channel Readings | Rate Schedule | Channel Readings | Meter Line to Add | Account Line to Add |
| Meter Code | Account Number | Channel Type (select) | Use Rate Schedule from this Meter | Channel Type (select) | Fixed Amount, Percentage, or Subtotal | Fixed Amount or Percentage |
| 70004760-GASOLINE-DOT-01 | 70004760-DOT | | Use Meter's Rate Schedule | | | |
| BILL_CAPTURE_EXAMPLE-ELE01 | 53-8579215-2 | | | | | |
| GOV-SUMMARY_METER-ELE01 | GOV-SUMMARY_METER-ELE01 | | | | | |
| LA_MALL-COMMON_AREA-ELE01 | LA_MALL-COMMON_AREA-ELE01 | | | | | |
| | | | | | | |
| LA_MALL-COMMON_AREA-NG01 | LA_MALL-COMMON_AREA-NG01 | | | | | |
| | | | | | | |
| STEAM_PLANT_ELE_01 | 65409234-23 | | | | | |
| STEAM_REMAINDER_SUMMARY | STEAM_REMAINDER_SUMMARY | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| SUB-CLASSROOM_ELE_01 | SUB-CLASSROOM_ELE_01 | Reading Use | | | Subtotal | |
| | | | | | Fixed Amount | |
| SUB-CLASSROOM_NG_01 | SUB-CLASSROOM_NG_01 | Reading Use | | | | |
| SUB-CLASSROOM_STM_01 | SUB-CLASSROOM_STM_01 | Reading Use | | | | |
| SUB-CLASSROOM_WS_01 | SUB-CLASSROOM_WS_01 | Reading Use | | | | |
| SUB-GYMNASIUM_ELE_01 | SUB-GYMNASIUM_ELE_01 | Reading Use | | | | Percentage |
| SUB-GYMNASIUM_NG_01 | SUB-GYMNASIUM_NG_01 | Reading Use | | | | |
| SUB-GYMNASIUM_STM_01 | SUB-GYMNASIUM_STM_01 | Reading Use | | | | |
| SUB-GYMNASIUM_WS_01 | SUB-GYMNASIUM_WS_01 | Reading Use | | | | |
| SUB-LABORATORY_ELE_01 | SUB-LABORATORY_ELE_01 | Reading Use | | | | |
| SUB-LABORATORY_NG_01 | SUB-LABORATORY_NG_01 | Reading Use | | | | |
| SUB-LABORATORY_STM_01 | SUB-LABORATORY_STM_01 | Reading Use | | | | |
| SUB-LABORATORY_WS_01 | SUB-LABORATORY_WS_01 | Reading Use | | | | |
| SUB-MUSIC_ELE_01 | SUB-MUSIC_ELE_01 | Reading Use | | | | |
| SUB-MUSIC_NG_01 | SUB-MUSIC_NG_01 | Reading Use | | | | |

Chargebacks Help Documentation

The screenshot displays the 'Happy Valley' user interface for chargeback management. The top navigation bar includes a search icon, a help icon (question mark), a notification bell with a '4' badge, and a user profile icon 'E'. The left sidebar features a vertical menu with icons for adding items, viewing logs, splitting bills, calculating bills, and workflows. The main content area is titled 'Chargeback Workflow' and lists three items: 'Workflow', 'Monthly Workflow', and 'Wattics Meters Monthly Workflow'. A right-hand sidebar contains a 'SUGGESTED TOPICS' section with five links, a 'HELP' section with three links, and an 'INFORMATION' section with two links. An orange box highlights the 'SUGGESTED TOPICS' section.

Happy Valley

Chargebacks

- Chargeback Log
- Bills Ready to Split
- Calculate Bills
- Chargeback Workflow**
 - Monthly Workflow
 - Wattics Meters Monthly Work...

Chargeback Workflow

- Workflow
- Monthly Workflow
- Wattics Meters Monthly Workflow

SUGGESTED TOPICS

- Bill Calculation Overview
- Bill Split Overview
- Chargeback Version
- Chargeback Workflow
- Chargebacks Overview

HELP

- Help Center
- Request Feature
- Contact Support

INFORMATION

- Getting Started Tour
- About



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BONUS TOPICS!!!

Bonus Chargeback Topics

Report 09a - Invoice Report

Report Distributions to support chargeback billing

Including account and meter charges on calculated bills

Chargeback versions

Questions?

Session Survey

conferences.energycap.com/surveys

