

What are CAPture Services?

CATALYST 





Session Agenda

- Types of Data
- Services Offerings
- Pros and Cons of Formats
- Enrollment
- Ongoing Management & Notifications

EnergyCAP's Mission

Help clients derive value from energy information through technology-based solutions.



Key Component to mission

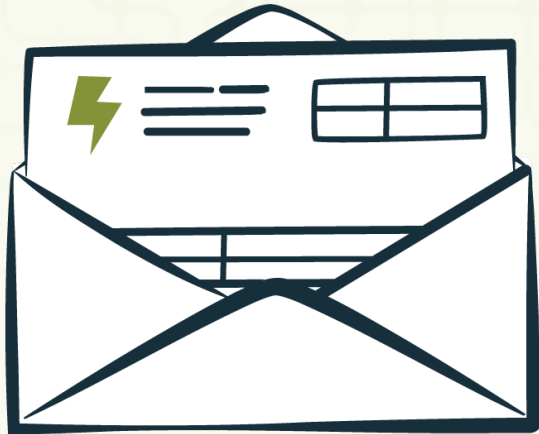
Accurate, Accessible, and Timely Energy Information

Client Energy Information



Two types of information

1. Utility bill



2. Interval or Time-Series Data



Data acquisition in NOT easy

Difficult to identify sources

Availability of desired formats

Timeliness of delivery

Automated vs manual acquisition

Complexities of data exchanges and formats

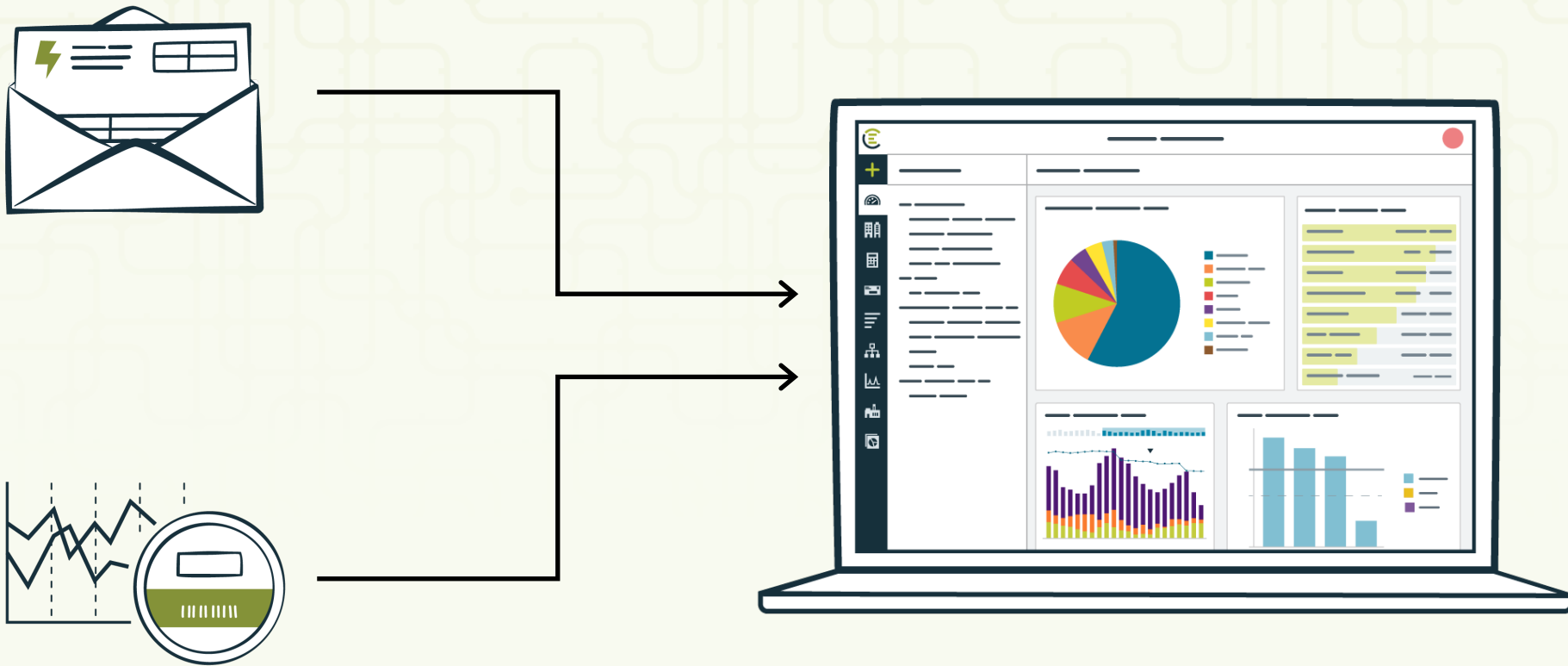
Restrictions of processes

Cumbersome and redundant workflow processes

Distracts you from energy management and sustainability activities

CAPture Services

Turns challenges into opportunities by removing the burden of acquiring and processing data.



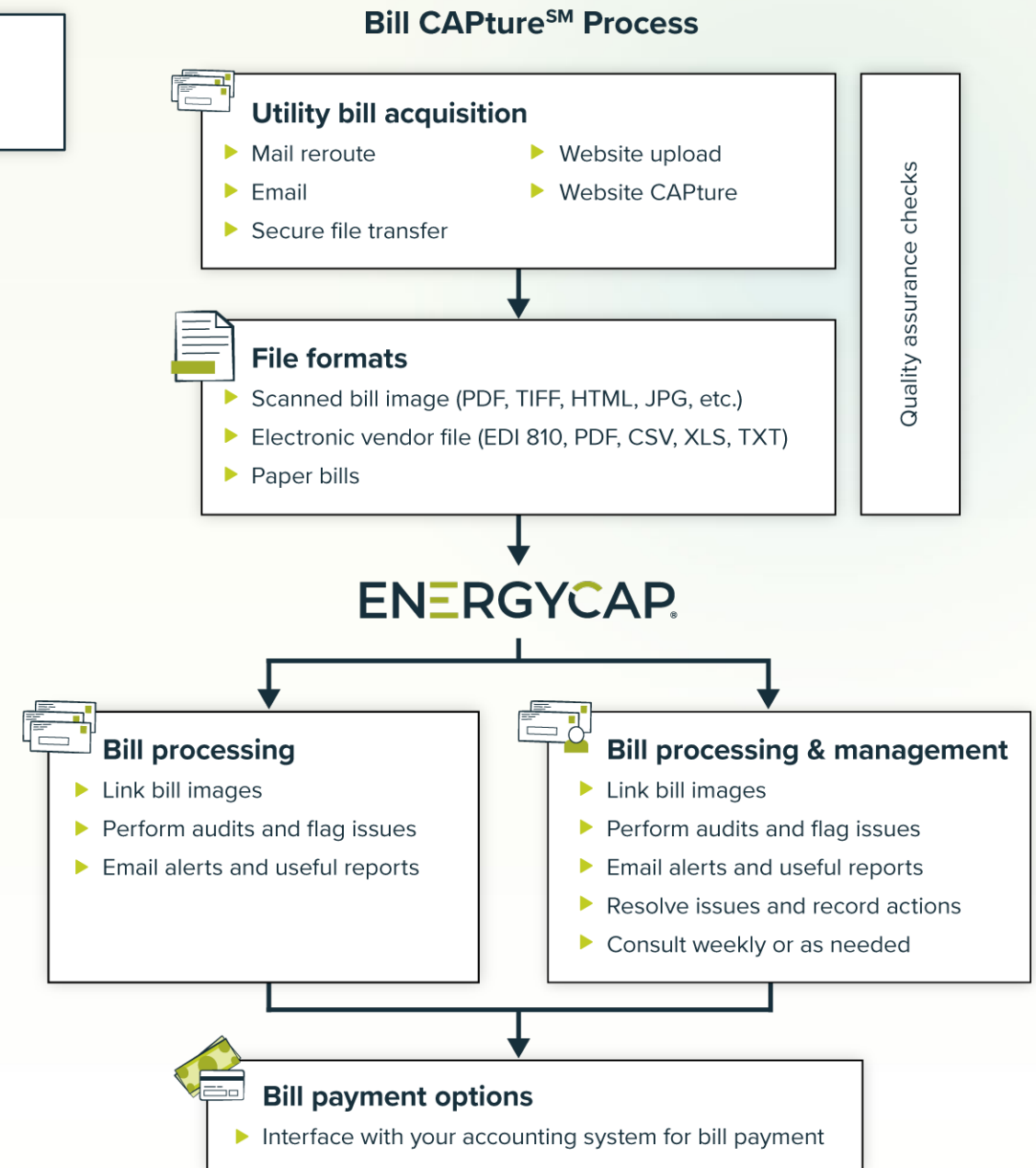
CAPture Services

Bill CAPtureSM

If manual bill data entry consumes way too many hours of your valuable time, let us do the work for you via Bill CAPture, our specialized utility bill processing services.

Smart CAPtureSM

Our Smart CAPture service simplifies the integration of interval data into your energy management routine by uploading your meter and device data into EnergyCAP for you.



Step 1: Consultation

Step 2: Solution selection

Step 3: Proposal

Step 4: Enrollment

Step 1: Consultation // Bill CAPtureSM managed services offerings

	Standard	Advanced	Premium	Not included
Access to Bill CAPture SM Platform	●	●	●	
Automated Bill Delivery	●	●	●	
Bill Processing	●	●	●	
Processing Notifications	●	●	●	
Standard Bill CAPture SM Support	●	●	●	
Report Distribution Management		●	●	
Kickout Management		●	●	
Flag Management		●	●	
Customer Status Meetings		●	●	
Access to Bill CAPture SM Library		●	●	
Vendor Engagement			●	
ENERGY STAR Portfolio Manager			●	
Management of Missing Bills			●	
Custom Reporting (including RDBI)				●
Manual Bill Processing				●
Bill Payment Workflow Actions				●
Open/Close Accounts				●

Step 1: Consultation

Step 2: Solution selection





















Step 3: Proposal

Step 4: Enrollment

Step 2: Solution Selection






Service levels (pre or post pay)

- Number of annual bills “transactions”
- Acquisition methods
- Bill formats
- Workflow considerations

Trait	Paper	PDF	Flat files	EDI 810
Data richness				
Processing speed				
Automation ability				
Vendor ability				
Processing cost				

 = Pro  = Con  = Variable

Mail Reroute

<div>  <div> <div>1400 N Lincoln Ave - ELE</div> <div>1635011000</div> <div>1400 N Lincoln Ave, Happy Valley, PA 12345, United States</div> </div> </div>	<div>  <div> <div>PA Gas Electric Co.</div> <div>PGE</div> <div>United States</div> </div> </div>	<div> <div>Batch</div> <div>20230126_BILLCAPTURE</div> </div>																																																			
<div> <div>Account History</div> <div>Timeline</div> <div>Note</div> </div> <table> <tr> <td>11/01/2022–12/02/2022</td><td>\$8,194.39</td></tr> <tr> <td>10/03/2022–11/01/2022</td><td>\$6,643.59</td></tr> <tr> <td>09/01/2022–10/03/2022</td><td>\$7,495.63</td></tr> <tr> <td>08/03/2022–09/01/2022</td><td>\$7,604.47</td></tr> <tr> <td>07/05/2022–08/03/2022</td><td>\$7,196.44</td></tr> </table>	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	<table> <tr> <td>Start</td><td>11/01/2022</td><td>End</td><td>12/02/2022</td><td>Days</td><td>31</td><td>Amount due</td><td>\$8,194.39</td></tr> <tr> <td>Billing period</td><td>November 2022</td><td>Due date</td><td>12/27/2022</td><td>Statement date</td><td>12/02/2022</td><td>Control code</td><td>sample</td></tr> </table>	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																										
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1	AccountCode	StartDate	EndDate	A/C/E	VENDORCODE	DUEDATE	CONTROLCODE	USE:KWH:Electric Usage	DEMAND:KW:Electric Demand	CHARGE:USDOLLARS:Cost
2	12345-09995	20110701	20110801	A	ELELOCAL	20110816	107808820	3983211	5993	219985.1
3	12345-09995	20110801	20110901	A	ELELOCAL	20110916	250350511	3893899	5860	222456.9
4	12345-09995	20110901	20111001	A	ELELOCAL	20111016	662314443	3522684	5308	225499.6
5	12345-09995	20111001	20111101	A	ELELOCAL	20111116	804474826	3042992	4594	230680.0
6	12345-09995	20111101	20111201	A	ELELOCAL	20111216	352578543	3107560	4690	225494.3
7	12345-09995	20111201	20120101	A	ELELOCAL	20120116	73763808	4002335	6021	198282.4
8	12345-09995	20120101	20120201	A	ELELOCAL	20120216	531811739	3650521	5498	246756.5
9	12345-09995	20120201	20120301	A	ELELOCAL	20120316	358993753	3734493	5623	252957.7
10	12345-09995	20120301	20120401	A	ELELOCAL	20120416	347485659	2961438	4472	272651.2
11	12345-09995	20120401	20120501	A	ELELOCAL	20120516	638219149	3240981	4888	199978.8
12	12345-09995	20120501	20120601	A	ELELOCAL	20120616	152116463	3184985	4805	252677.7
13	12345-09995	20120601	20120701	A	ELELOCAL	20120716	835037114	3799800	5720	188365.5
14	12345-09995	20120701	20120801	A	ELELOCAL	20120816	566381323	3079231	4648	228458.0
15	12345-09995	20120801	20120901	A	ELELOCAL	20120916	347088883	2652243	4012	277768.7
16	12345-09995	20120901	20121001	A	ELELOCAL	20121016	766211372	3749406	5645	175760.8
17	12345-09995	20121001	20121101	A	ELELOCAL	20121116	641702527	3702011	5574	20326.7
18	12345-09995	20121101	20121201	A	ELELOCAL	20121216	302055842	3655326	5620	174653.7

Step 2: Solution Selection // Website CAPture

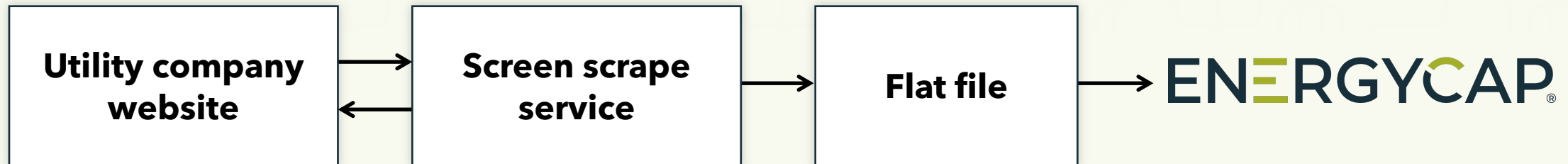
Thousands of supported vendors

Login using credentials

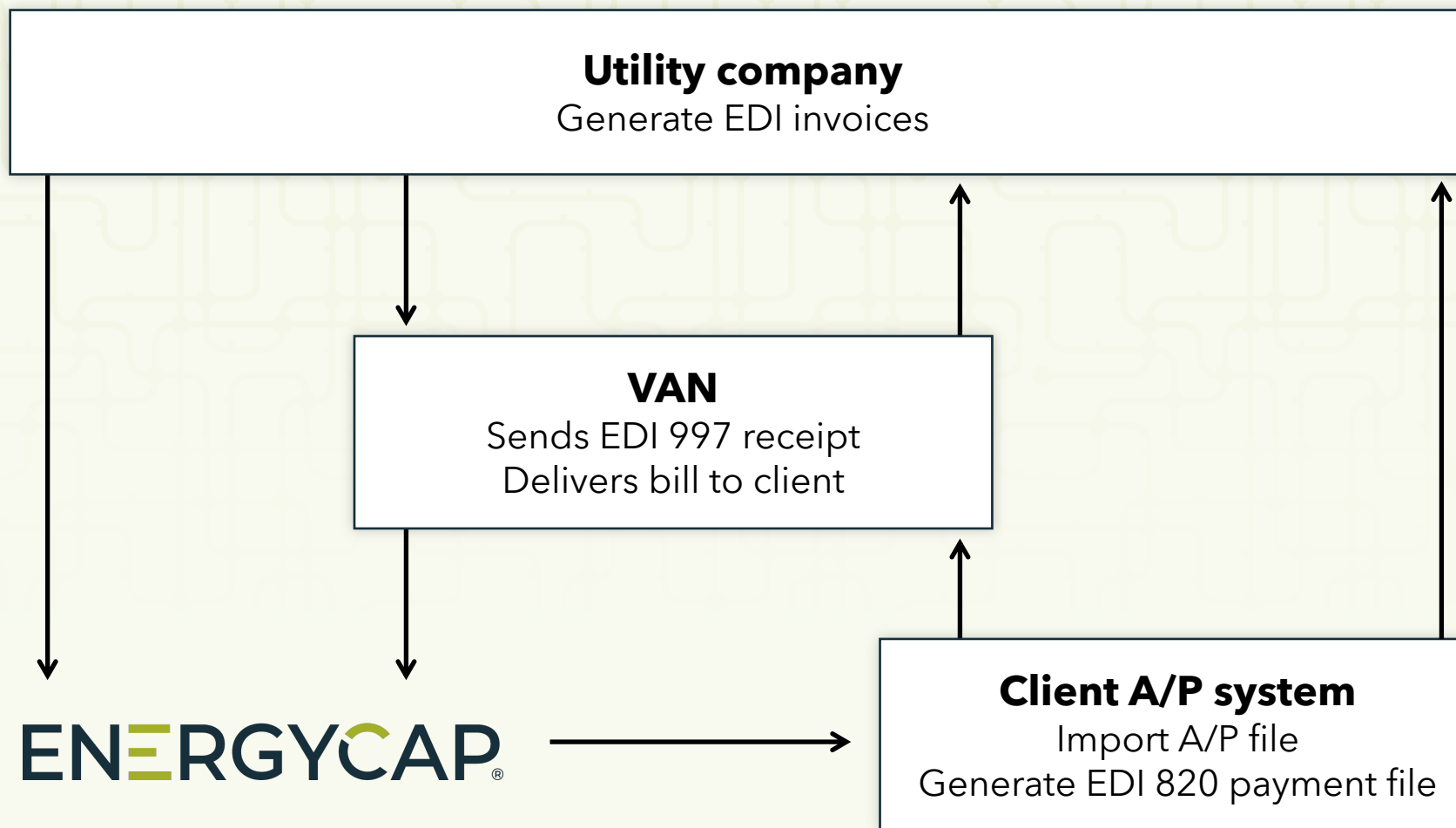
Download PDF

Longer SLA

Considerations for dual authentication and CAPTCHA



Step 2: Solution Selection // EDI 810



Step 2: Solution Selection // Flat File Import



Step 1: Consultation
Step 2: Solution selection
Step 3: Proposal
Step 4: Enrollment

Step 3: Proposal // Fee structure

Annual Subscription Fee

- Total number of subscribed annual “transactions”
- Considerations for bill formats
- All methods of acquisition are included
- Overage fees apply

One-Time Fee

- Initial enrollment of meters
- Variable based on volume
- Project management time for additional configuration and training

Step 1: Consultation
Step 2: Solution selection
Step 3: Proposal
Step 4: Enrollment

Step 4: Enrollment // Contract execution

Finalize transaction counts, formats, SLA

Sign Bill CAPture agreement



Step 4: Enrollment // Prepare

Review Help pages:

- *"Preparing for Bill Processing"*
- *"Scanning Guidelines"*

Identify deadlines

Scanner settings

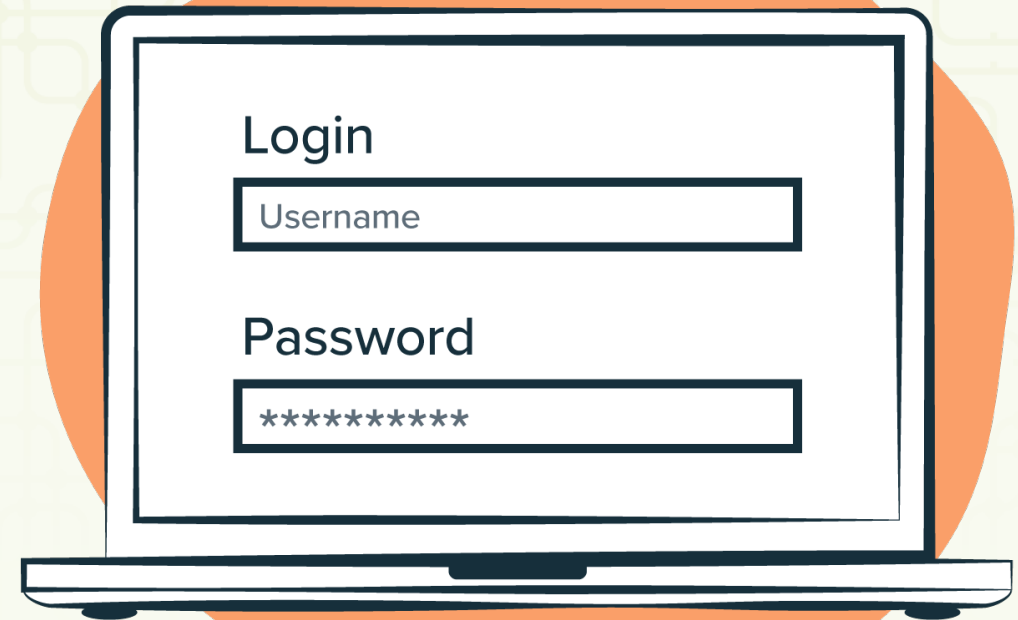
If your scanner allows, set the following options.

Page Size:	Auto Detect (if unavailable, select 8.5 X 11)
Color Mode:	Black and White or Auto Color
Duplex Mode:	Duplex mode for documents having pertinent information on BOTH sides of the paper
Simplex Mode:	Simplex mode for documents having pertinent information on ONE side of the paper
Resolution/DPI:	300 DPI is the minimum
Output:	PDF or multi-page TIFF
Orientation:	Select Auto Text Orientation Detection if available.
Zooming/Scaling:	Do not turn on

Step 4: Enrollment // ENC creates Bill CAPture Upload Account

Enables you to:

- Access Bill CAPture web portal
- Upload bills
- Review batch statuses (processed, kicked out, etc.)
- Adjust account settings
- Monitor transactions processed



Step 4: Enrollment // ENC creates Bill CAPture upload account tips

Read and understand “Usage Alert” emails.

ENERGYCAP.

Bill CAPtureSM

Thank you for using EnergyCAP Bill CAPture!

Our records indicate that you are on pace to exceed your contracted number of **Live Transactions** by the end of the current processing year. If this trend continues and an overage occurs, a charge will be assessed at the rate specified in your Bill CAPture contract.

As of today, you are **33%** into the current processing period and have used **49%** of your contracted number of **Live Transactions**.

To review processing statistics, please log into your [Bill CAPture upload account](#) and click on the “Stats” tab. If you have any questions or would like to turn off this alert, please [contact us](#).

Life has changed, but work goes on. [How can we help?](#)

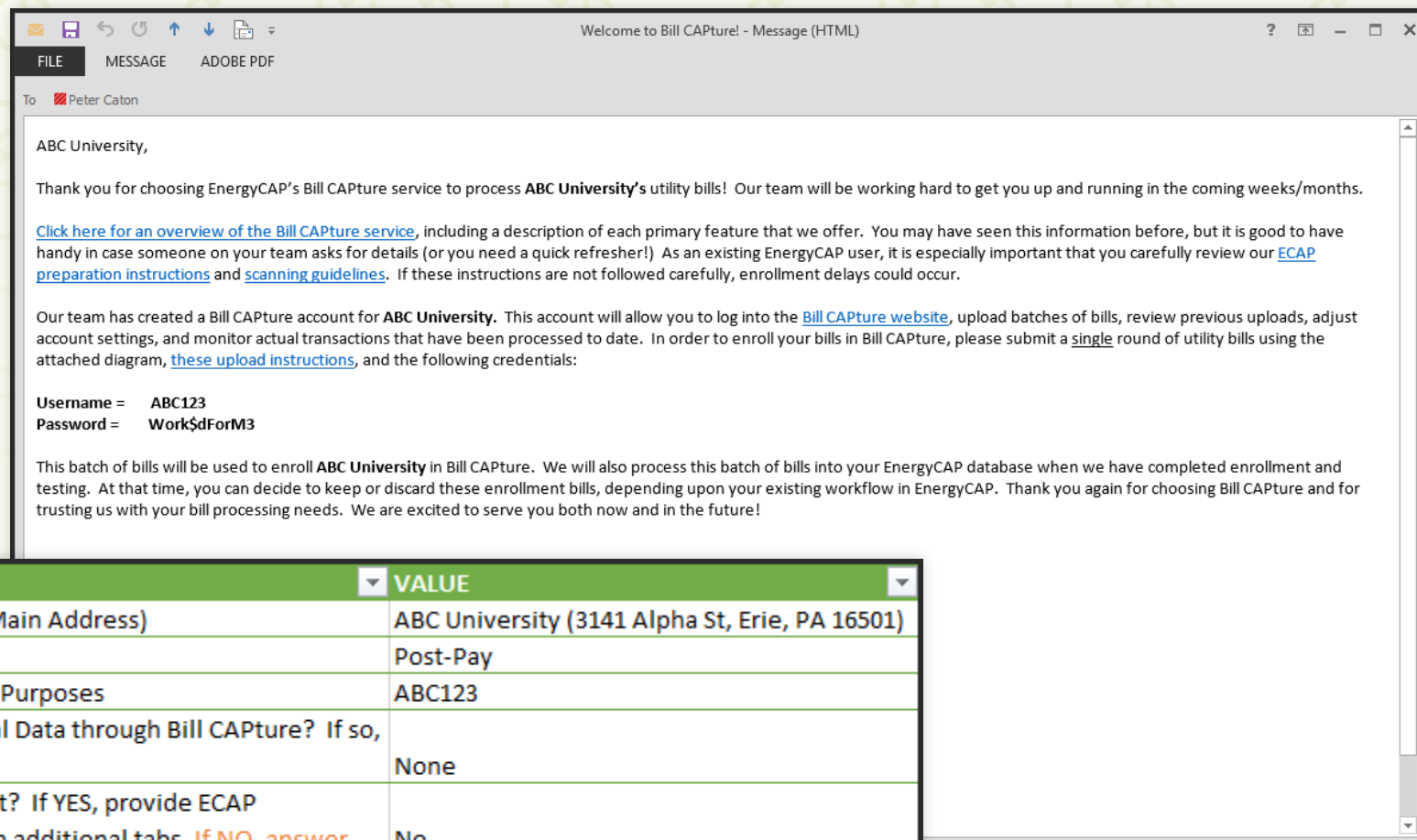
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Step 4: Enrollment // ENC sends welcome package to client

Welcome email

Enrollment form



DESCRIPTION	VALUE
Client Name (and Main Address)	ABC University (3141 Alpha St, Erie, PA 16501)
Pre-Pay, Post-Pay	Post-Pay
Client ID for Billing Purposes	ABC123
Uploading Historical Data through Bill CAPture? If so, months/years.	None
Existing ECAP Client? If YES, provide ECAP setup/billing info in additional tabs. If NO, answer	No
Number of meters to enroll	310
Vendor Codes	FDG Discretion
List of Expected Commodities	Electric, Natural Gas, Water, Sewer

Step 4: Enrollment // ENC sends welcome package to client

Enrollment form allows ENC to:

- Understand historical bill entry patterns
- Capture data to your specifications
- Identify deregulated billing scenarios
- Identify “kickout representative”

Complete enrollment form with detail

Log “Special Instructions”

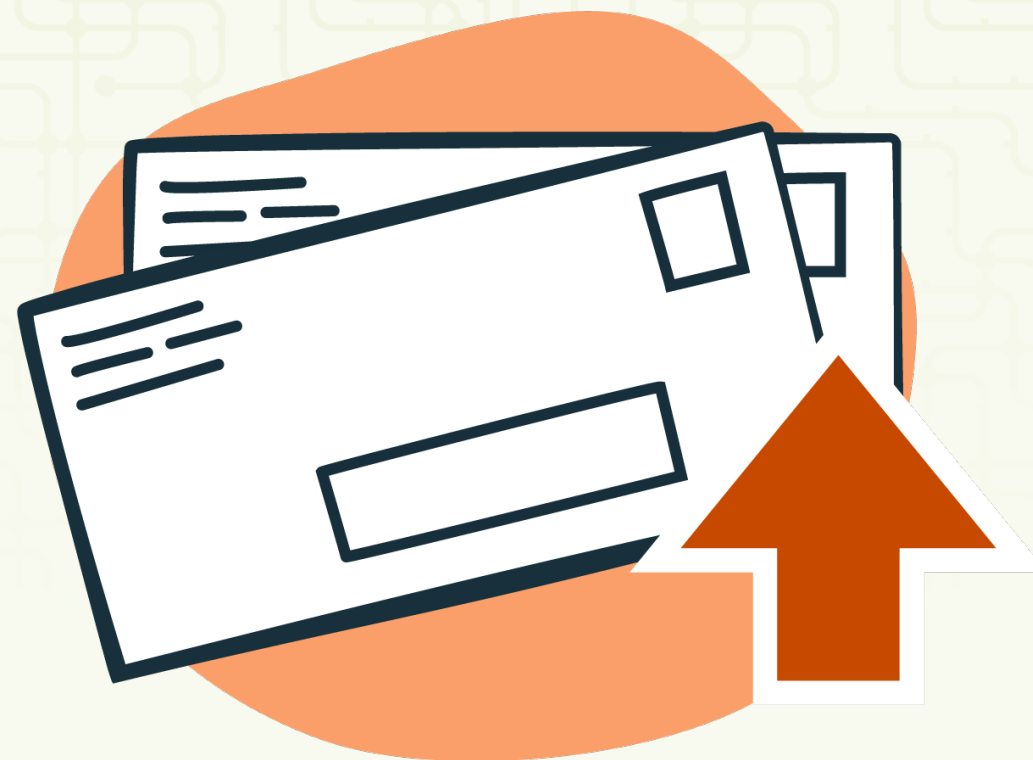


Step 4: Enrollment // Client uploads enrollment bills and submits completed enrollment form

Stay Organized

- Use a single enrollment batch
- Upload only one bill per account
- Align bill end dates to a single month
- Collect subsequent bills and hold them

Upload and get into the queue!

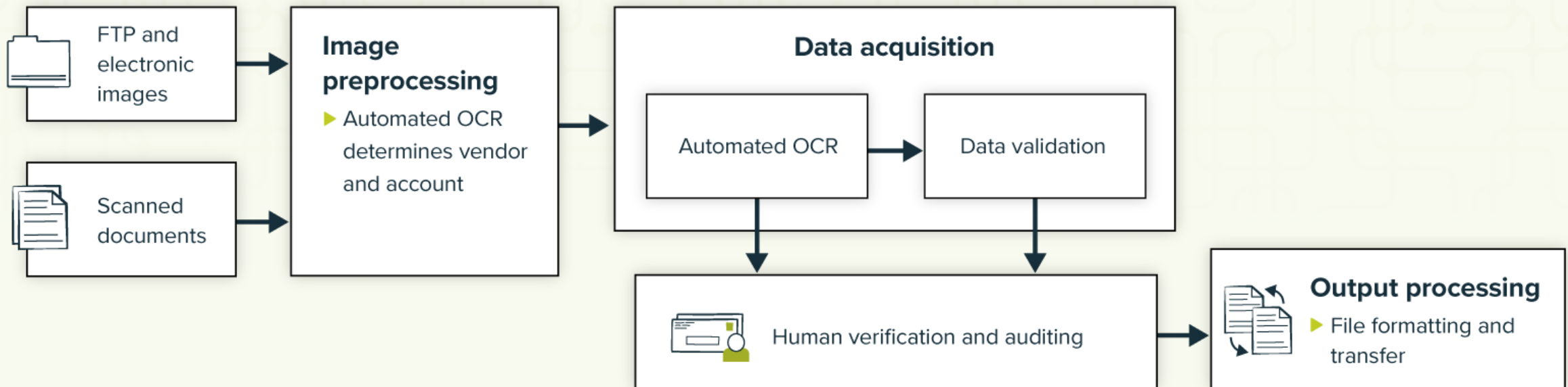


Step 4: Enrollment // Processing center maps enrollment bills

Invoice review and line-item mapping

Multi-stage auditing process

Map to utility rates

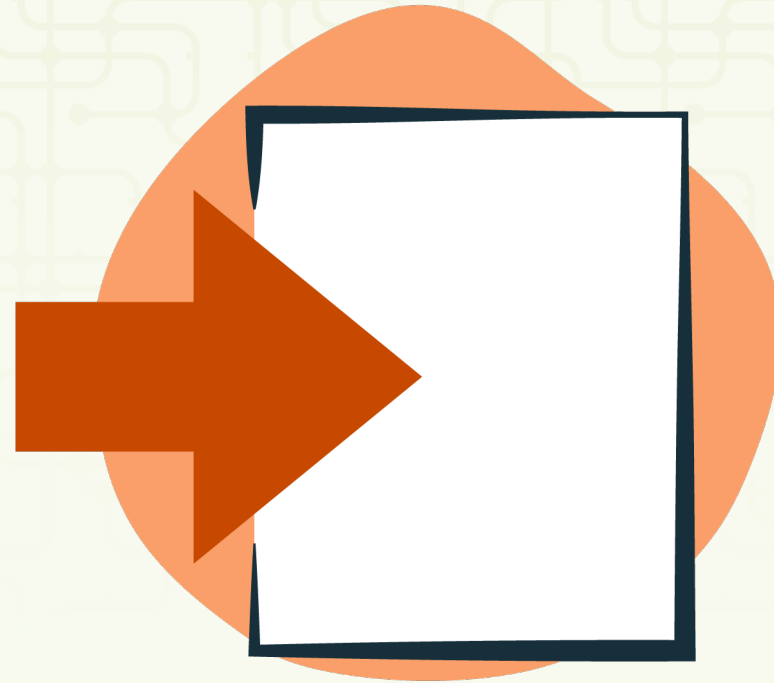


Step 4: Enrollment // ENC attempts initial test import

Import into your active database

"BCTEST_" batches are quickly voided

Kickout batches → "kickout representative"



Step 4: Enrollment // Client resolves kickouts

Your engagement is critical.

Bill CAPture onboarding is halted until all kickouts have been resolved.



Step 4: Enrollment // Client resolves kickouts

Carefully review instructions for resolving kickouts



Thank you for using EnergyCAP Bill CAPture!

Bill CAPture Testing Client 13

You are receiving this email because a recent bill import produced some kicked out records. Below, you will find a summary of the kicked out records.

Original File Name: **bctest13\$20200915.16.04.17_X02.zip**

Reserved Batch Name: **BCTEST13\$20200915.16.04.17_X02**

Total Bills in Batch: 1

Once you make the necessary corrections in EnergyCAP, you can resubmit the data for bill entry by clicking the reprocess button below. This button can only be clicked on once, so be sure to make corrections prior to clicking it.

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Reprocess



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Step 4: Enrollment // Client re-attempts test import

Often an iterative process

Types of notifications

- "Kickout Report"
- "Batch Successfully Processed"

Speed of notifications

When in doubt, contact us.

ENERGYCAP. Bill CAPtureSM

Thank you for using EnergyCAP Bill CAPture!

Your batch has been processed and is now available in EnergyCAP. The processed batch name is **TBR\$20210519.02.17.52_X02**. Click [here](#) to view a summary of bills in this batch that were imported into EnergyCAP.

Bill CAPture reports specific to this batch can be found below.

[Download BL22](#)

[Download Report-09](#)

[Download Report-12](#)

[Download Report-27](#)

If you have any questions regarding this batch, please [contact us](#).

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Step 4: Enrollment // ENC validates enrollment bills

For each bill layout, we validate the following:

- Service Begin Date
- Service End Date
- Statement Date
- Due Date
- Invoice Number
- Rate Code
- Total Usage
- Total Actual Demand
- Total Billed Demand
- Total Cost
- Unit Cost



Step 4: Enrollment // ENC validates enrollment bills

Rest assured, our experts are on it!

CLIENT CODE	VENDOR NAME	COMMODITY	RATE SCHEDULE	ACCOUNT NUMBER	EVALUATION DATE	TOTAL USE	TOTAL COST	ACTUAL DEMAND	BILLED DEMAND	STATEMENT DATE	START & END SERVICE DATES	DUE DATE	INVOICE #	RATE NAME	USAGE UNIT	USE ON DEREGULATED ACCOUNTS	RC REVIEWER INITIALS	COMMENTS	Due Dates
	Jamestown Gas & W	Water & Sewer	WATER		3/24/2017	PASS	PASS	N/A	N/A	PASS	PASS	PASS	N/A	FAIL	PASS	N/A	ADK	This rate should be	
	Jamestown Gas & W	Water & Sewer	WATER/SEWER		3/24/2017	PASS	PASS	N/A	N/A	PASS	PASS	PASS	N/A	PASS	PASS	N/A	ADK		
	Johnson City Utility	Water & Sewer	WATER/SEWER		3/24/2017	PASS	PASS	N/A	N/A	PASS	PASS	PASS	N/A	PASS	PASS	N/A	ADK		
	Kenton Utilities	Water & Sewer	WATER/SEWER		3/24/2017	PASS	PASS	N/A	N/A	PASS	PASS	PASS	N/A	PASS	PASS	N/A	ADK		
	Kingston Water	Water & Sewer	WATER/SEWER		3/24/2017	PASS	PASS	N/A	N/A	PASS	PASS	PASS	N/A	PASS	PASS	N/A	ADK		
	Knox Chapman Utility	Water & Sewer	WATER/SEWER		3/24/2017	PASS	PASS	N/A	N/A	PASS	PASS	PASS	N/A	PASS	PASS	N/A	ADK		
	KUB- Knoxville	Natural Gas	COMMIND G4		3/24/2017	PASS	PASS	N/A	N/A	PASS	PASS	PASS	N/A	PASS	PASS	N/A	ADK		
	KUB- Knoxville	Electric	COMMIND GSA 2		3/24/2017	PASS	PASS	PASS	PASS	PASS	PASS	PASS	N/A	PASS	PASS	N/A	ADK		
	KUB- Knoxville	Water & Sewer	NONRESIDENTIAL		3/24/2017	PASS	PASS	N/A	N/A	PASS	PASS	PASS	N/A	PASS	PASS	N/A	ADK		
	KUB- Knoxville	Electric	GAS G7		3/27/2017	FAIL	FAIL	N/A	N/A	PASS	PASS	PASS	N/A	FAIL	PASS	N/A	ADK	There is a meter	
	KUB- Knoxville	Natural Gas	COMMIND G6		3/27/2017	PASS	PASS	N/A	N/A	PASS	PASS	PASS	N/A	PASS	PASS	N/A	ADK		
	La Vergne, City of	Water & Sewer	WATER/SEWER		3/27/2017	PASS	PASS	N/A	N/A	PASS	PASS	PASS	N/A	PASS	PASS	N/A	ADK		
	Lafayette, City of	Water & Sewer	WATER/SEWER		3/27/2017	PASS	PASS	N/A	N/A	PASS	PASS	PASS	N/A	PASS	PASS	N/A	ADK	Please confirm that	
	Lafayette Utilities	Water & Sewer	WATER/SEWER		3/27/2017	PASS	PASS	N/A	N/A	PASS	PASS	PASS	N/A	PASS	FAIL	N/A	ADK	In TBR round,	
	Lakewood Utility Dist	Water & Sewer	WATER/SEWER		3/27/2017	PASS	PASS	N/A	N/A	PASS	PASS	PASS	N/A	PASS	FAIL	N/A	ADK	Ask FDG to confirm	
	Louderdale County W	Water & Sewer	WATER/SEWER		3/27/2017	PASS	PASS	N/A	N/A	PASS	PASS	PASS	N/A	PASS	PASS	N/A	ADK	Is E01 the rate?	
	LCUB- Lenoir City	Water & Sewer	WATER/SEWER		3/27/2017	PASS	PASS	N/A	N/A	PASS	PASS	PASS	N/A	PASS	PASS	N/A	ADK		
	LCUB- Lenoir City	Natural Gas	NATURAL		3/27/2017	PASS	PASS	N/A	N/A	PASS	PASS	PASS	N/A	FAIL	PASS	N/A	ADK	I need to notify FDG	
	Lebanon Utilities, Cit	Water & Sewer	WATER/SEWER		3/27/2017	PASS	PASS	N/A	N/A	PASS	PASS	PASS	N/A	PASS	PASS	N/A	ADK		
	Lewisburg Water & W	Water & Sewer	WATER/SEWER		3/27/2017	PASS	PASS	N/A	N/A	PASS	PASS	PASS	N/A	PASS	PASS	N/A	ADK		
	Lexington Utilities	Water & Sewer	WATER/SEWER		3/27/2017	PASS	PASS	N/A	N/A	PASS	PASS	PASS	N/A	PASS	PASS	N/A	ADK		
	Linden Utilities, Tow	Water & Sewer	WATER/SEWER		3/27/2017	PASS	PASS	N/A	N/A	PASS	PASS	PASS	N/A	PASS	PASS	N/A	ADK		
	Livingston, Town of	Water & Sewer	WATER/SEWER		3/27/2017	PASS	PASS	N/A	N/A	PASS	PASS	PASS	N/A	PASS	PASS	N/A	ADK		
	Loudon Utilities	Electric	ELECTRIC		3/27/2017	PASS	PASS	N/A	N/A	PASS	PASS	PASS	N/A	PASS	PASS	N/A	ADK		
	Madisonville Gas & W	Water & Sewer	WATER		3/27/2017	PASS	PASS	N/A	N/A	PASS	PASS	PASS	N/A	PASS	PASS	N/A	ADK	Please confirm that the unit should	
	Manchester Water & S	Water & Sewer	WATER/SEWER		3/27/2017	PASS	PASS	N/A	N/A	PASS	PASS	PASS	N/A	PASS	PASS	N/A	ADK		
	Martin, City of	Natural Gas	NATURAL GAS		3/27/2017	PASS	PASS	N/A	N/A	PASS	PASS	PASS	N/A	PASS	PASS	N/A	ADK		
	Martin, City of	Water & Sewer	WATER/SEWER		3/27/2017	PASS	PASS	N/A	N/A	PASS	PASS	PASS	N/A	PASS	PASS	N/A	ADK		
	Maryville, City of	Electric	S0R		3/27/2017	PASS	PASS	PASS	N/A	PASS	PASS	PASS	N/A	PASS	PASS	N/A	ADK		
	Maryville, City of	Water & Sewer	WNRI		3/27/2017	PASS	PASS	N/A	N/A	PASS	PASS	PASS	N/A	FAIL	PASS	N/A	ADK	Rate should be	
	Maysville Utility	Water & Sewer	WATER/SEWER		3/27/2017	PASS	PASS	N/A	N/A	PASS	PASS	PASS	N/A	PASS	PASS	N/A	ADK	Is unit on water	
	McEwen Water	Water & Sewer	WATER/SEWER		3/27/2017	PASS	PASS	N/A	N/A	PASS	PASS	PASS	N/A	PASS	PASS	N/A	ADK	Is rate E01? The	
	Metropolitan Lyckb	Water & Sewer	WATER/SEWER		3/27/2017	PASS	PASS	N/A	N/A	PASS	PASS	PASS	N/A	PASS	PASS	N/A	ADK	Is rate D02? I need	
	MLGW-Memphis Lig	Electric	E-2 COMMERCIAL		3/27/2017	FAIL	PASS	PASS	N/A	PASS	PASS	PASS	N/A	FAIL	PASS	N/A	ADK	The electric rate	
	MLGW-Memphis Lig	Natural Gas	G-3 COMMERCIAL		3/27/2017	PASS	PASS	N/A	N/A	PASS	PASS	PASS	N/A	PASS	PASS	N/A	ADK		
	MLGW-Memphis Lig	Water & Sewer	W-7 COMMERCIAL		3/27/2017	PASS	PASS	N/A	N/A	PASS	PASS	PASS	N/A	FAIL	PASS	N/A	ADK	The water rate	
	MLGW-Memphis Lig	Water & Sewer	W-8 COMMERCIAL		3/27/2017	PASS	FAIL	N/A	N/A	PASS	PASS	PASS	N/A	PASS	PASS	N/A	ADK	I believe the -3.00	
	MLGW-Memphis Lig	Electric	E-4 COMMERCIAL		3/27/2017	PASS	FAIL	PASS	PASS	PASS	PASS	PASS	N/A	PASS	PASS	N/A	ADK		
	MLGW-Memphis Lig	Water & Sewer	W-57 COMMERCIAL		3/27/2017	PASS	PASS	N/A	N/A	PASS	PASS	PASS	N/A	PASS	PASS	N/A	ADK		
	MLGW-Memphis Lig	Natural Gas	G-10 COMMERCIAL		3/27/2017	PASS	PASS	N/A	N/A	PASS	PASS	PASS	N/A	PASS	PASS	N/A	ADK		

Step 4: Enrollment // Client approves enrollment work

"Enrollment Complete" email is sent out

Existing bills preserved; not overwritten

Client approves through live upload or
30 days of no activity

Review bills and provide timely feedback

Delete bills, if desired




Step 4: Enrollment // Enrollment complete

Future Bill CAPture inquiries should be routed through Support Team.

Select "Bill CAPture" option

Please be sure to report processing errors

For managed services - assigned rep



Contact Bill CAPture Support

Enter your information and we'll reply by email.

Full Name

Email

Priority

Description

Still can't find the answers you're looking for?
Contact our customer support team for assistance.

EnergyCAP Platform Support

Bill CAPture Platform Support

Questions?

Session Survey

conferences.energycap.com/surveys

