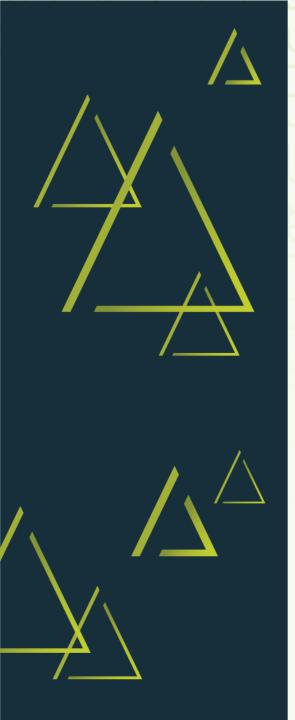
How do I know my bills are valid?

CATALYSTA





Session Agenda

- What are Bill Audits
- How do Bill Flags work
- How do I resolve Bill Flags
- Identify and report on potential bill issues
- Q&A
- Survey

Bill Audits

Bill audits are powerful tools for data validation, examining utility bill data for accuracy and unusual patterns of use or cost.

Audits flag bills for manual review and indicate there may be a problem.

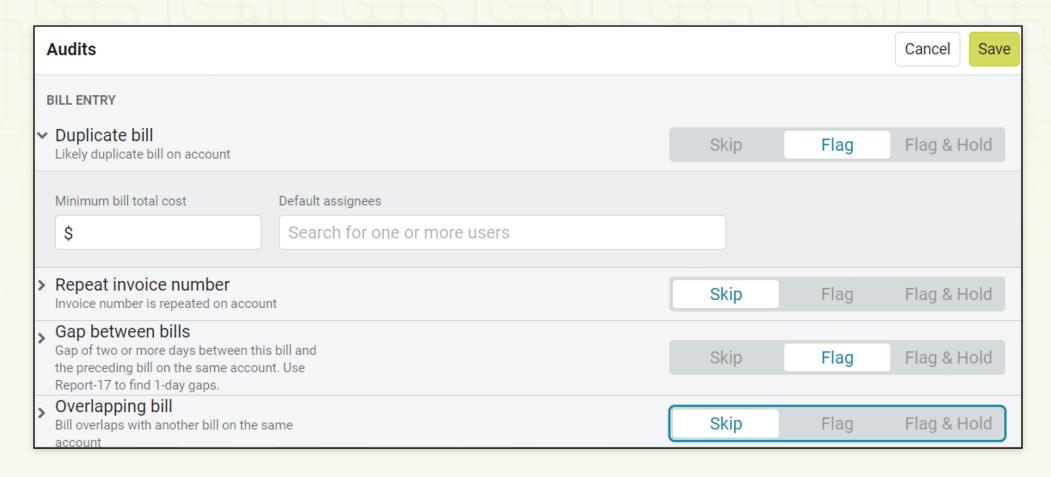
All bills, no matter how they are entered—Bill CAPture, bill import, manual bill entry—are audited as they are entered into EnergyCAP.

A bill can also be manually flagged by a user.



Audit Settings

You can configure each bill audit individually to meet specific criteria.



Audit Settings

Three categories of bill audits.

Bill entry

Are focused on the basic elements of the bill and help to ensure accurate information is available for reporting and analysis.

Imported bills

These audits run specifically for imported bills; this includes Bill CAPture.

Outlier audits

These audits use the same logic as Report-13 and help you to identify abnormal bills using bill history along with past and current weather data.

Outlier Audits

These audits use quadratic regression models for use, cost, and demand.

Outlier audits do not run on meters that are attached to organizations.

Outlier audits run when chargeback bills are created. No other audits run for chargebacks during the create process.

If you edit a chargeback bill and it fails any audit, it is flagged.

Disable Audits

You can disable audits on specific accounts.

Actions -Edit Account Change Account Number Stop Auditing Bills on this Account Download Account Bills to Excel Enter New Bill

1210 Grant Ave - ELE

000... not included in bill accruals not auditing bills on this account 1210 Grant Ave, Happy Valley, PA 12345, United States

Manage flagged bills

Four ways to view and manage flagged bills.

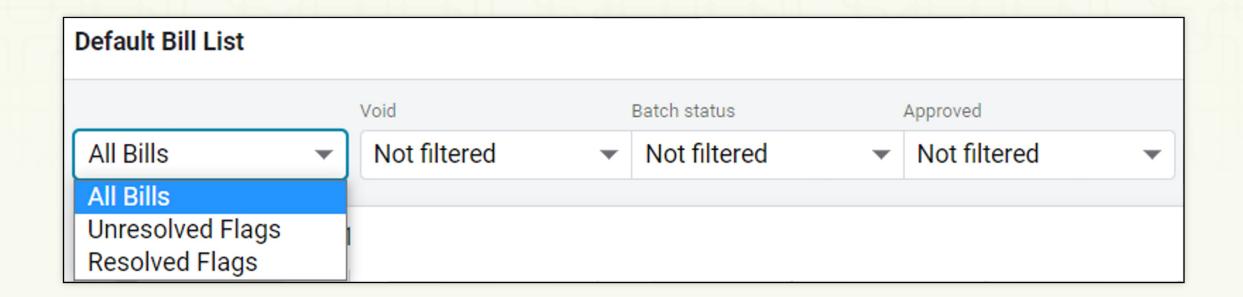
- Bill lists
- Flags tab
- Dashboard widgets
- Report 27



Quick Filters

Quickly find unresolved or resolved flags.

- A red flag = unresolved
- A green flag = resolved

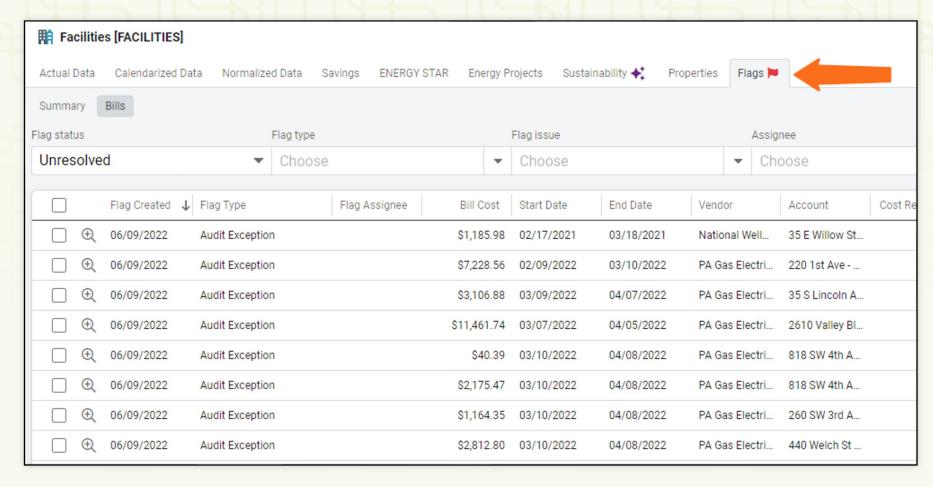


Quick Filters

- 1. In the Bills module, go to the **Default Bill List.**
- 2. Use the quick filter to find resolved flags.
- 3. Click and view one of the bills.
- 4. Review the **flag details** (by bill note).

Flags Tab

Use the Flags tab from anywhere in the Accounting or Facilities tree.

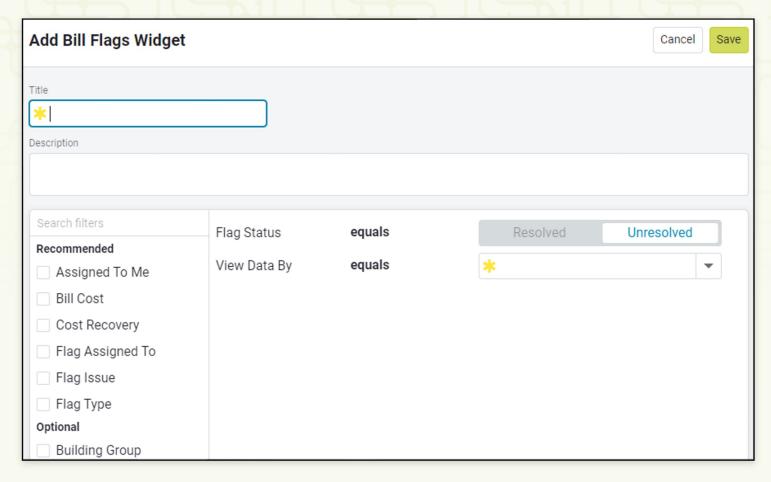


Flags Tab

- 1. In the Buildings and Organizations module.
- 2. Go to the **City Buildings** organization
- 3. Click on the **Flags** tab.
- 4. Note the Total Flagged Bills at the top of the page.
- 5. Click on a meter from the list.
- 6. Click on a bill, review the flag information and resolve the flag.

Dashboard and Widgets

You can configure and add widgets to a dashboard.

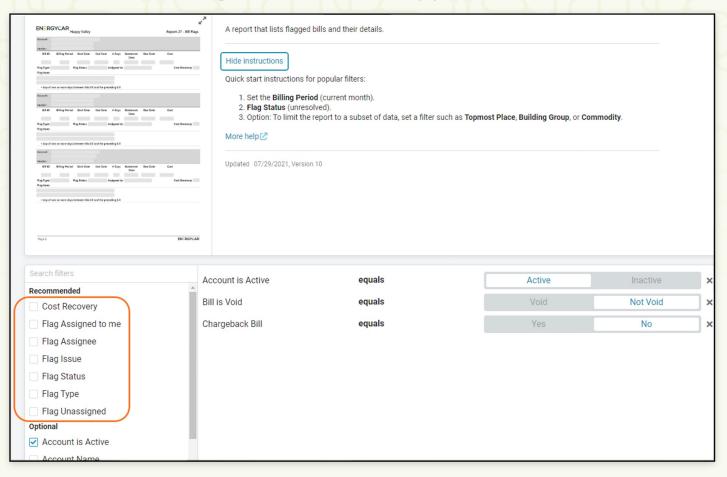


Dashboard and Widgets

- 1. In the Dashboards module click on **SAMPLE: Utility Bill Accounting** (or create a new Dashboard).
- 2. Add the **Flags** widget, add and set filters.
- 3. Add your initials to the name of the widget.
- 4. View dashboard after everyone adds a widget.

Report 27

Use the filters in **Report 27** to find flagged bills.



Report 27

- 1. In the Reports module.
- 2. Select Report 27 Bill Flags.
- 3. Review the instructions at the top.
- 4. Set the filters and run the report.

Report 13

- 1. In the Reports module.
- 2. Select Report 13 Bill Analysis.
- 3. Review the instructions at the top.
- 4. Set the filters and run the report.

Wrap up

Bill Audits

Bill Flags

Identify and report on potential bill issues



Questions?

I will be around all week to chat!

Session Survey

conferences.energycap.com/surveys

