


Creating a Rate Using the Rate Wizard

EnergyCAP recommends creating rates using the **Rate Wizard** (follow procedure below). It is easier than using the "[Simple Rate](#)" creation method.

1. Select **Accounting > Rates**. The **Rate Manager** appears.
2. Click to select the vendor under which to create the rate.

NOTE: Click  to navigate the hierarchy of vendors.

3. From the **Rate** menu (or from the right-click popup menu), select **New Rate > Wizard**. The **Rate Wizard-General** window appears. If it does not, make sure that a vendor is selected/highlighted from the vendor list.
4. Input the requested information including:

- Rate **Name** (Typically, the rate name listed on the actual bill is used. Rate names found on bills differ occasionally from the names found in tariff information)
NOTE: Each rate name associated with a vendor **MUST** be unique (for example, cannot have a "GS1" rate for electric AND water)
- Rate **Type** (options are Fuel Cost, Rate Rider or Tax)
- Commodity
- Effective Date (The first day that the rate is effective) Effective dates are typically derived from tariff information. Enter the rate effective date or use the drop-down arrow to select the date from the popup calendar.
- Any desired **Note** (any comments specific to this rate, up to 255 characters).

1. After making your selections, click **Next** button to proceed to the **Rate Wizard-Feature Selection** page.

NOTES: If desired, use the **Back** button to return to a previous **Rate Wizard** page. And/or use the **Cancel** button to exit the **Rate Wizard** without saving the rate. Wizard page/window content and number of windows may vary depending on selected rate options.

1. Select the desired rate Features by clicking the checkboxes associated for each. For additional information on the Rate Wizard options, click on a link below:

- [Rate Wizard Customer/Facilities Charges Option](#)
- [Rate Wizard Demand Charge Option](#)
- [Rate Wizard Energy Charge Option](#)
- [Rate Wizard Billing Period Adjustment Option](#)
- [Rate Wizard Seasonal Pricing Option](#)
- [Rate Wizard Time of Use Option](#)

1. After selecting the desired rate Features, click **Next** to open the **Rate Wizard-Minimum/Maximum** window. If applicable click the **Rate Minimum** and/or **Rate Maximum** checkboxes and input the appropriate values from the rate schedule. For additional information on the Rate Wizard options, click on the link below:

- [Rate Wizard Minimum/Maximum Option](#)

1. Click **Next** to open the **Rate Wizard-Finished** window.
2. To save all changes, click **Finish**. Or click **Cancel** to exit the Rate Wizard without saving the rate.