B3 Enterprises

B3 UtiliTrack

User's Guide

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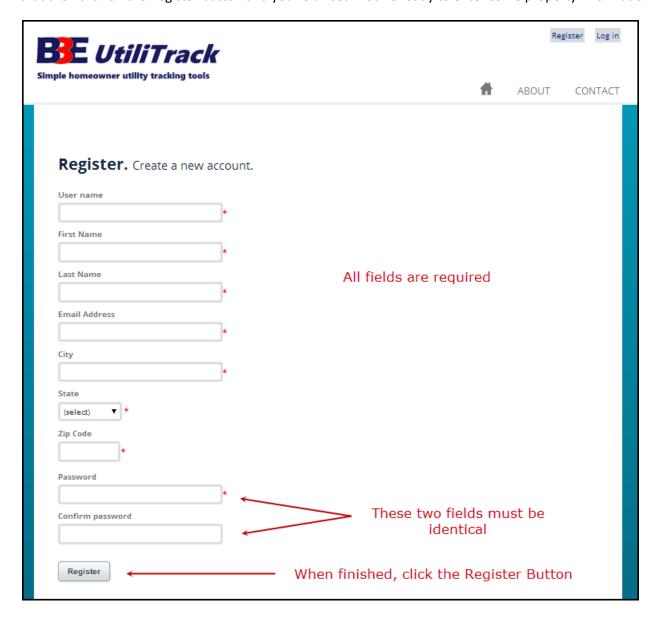
Welcome to UtiliTrack! Let's get started.

We're so glad you're here. If you have any questions at all please don't hesitate to click on the 'Contact' link at the top right of any of the pages and we'll be happy to help in any way we can.

Signing up

When you first get to the site the first thing that you want to do is click 'Register' to get signed up.
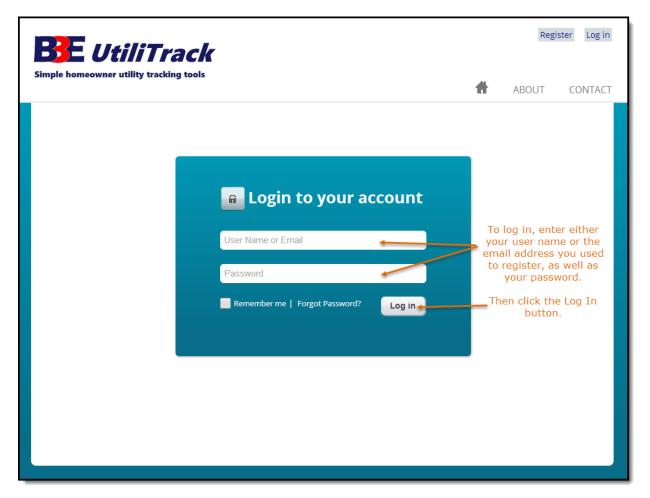
This will take you to the registration page. On this page, all of the fields are required to be filled in. Once you enter your information you'll need to create a password for your account and type it a second time to verify it. When you finish that then click on the Register button and you're all set. You're ready to enter some property information.
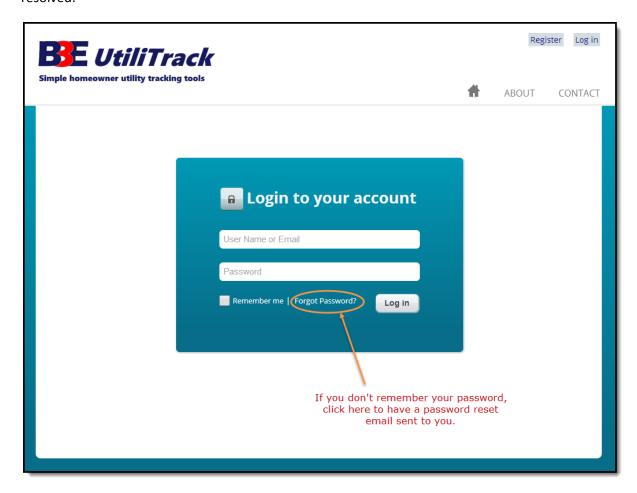
Logging In

From the Log In page simply enter your username or email address and your password and click the Log In button.

Note: If you want your user name saved in a browser cookie, click the "Remember me" checkbox before you click the "Log In" button.
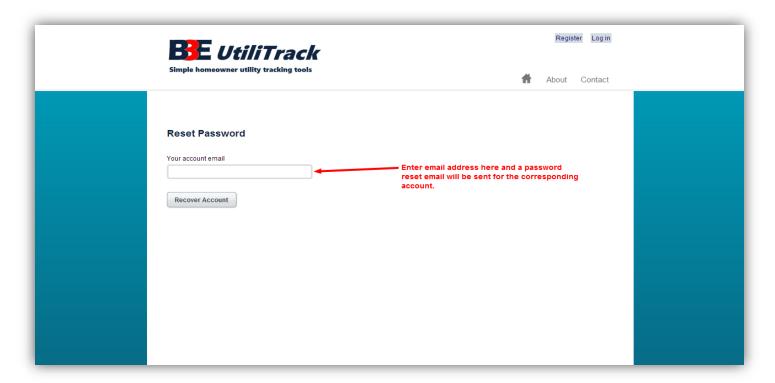
Password Recovery

If you don't remember your password then click on the 'Forgot Password?' link and we'll see if we can help you get that resolved.

If you don't remember your password, click here to have a password reset email sent to you.
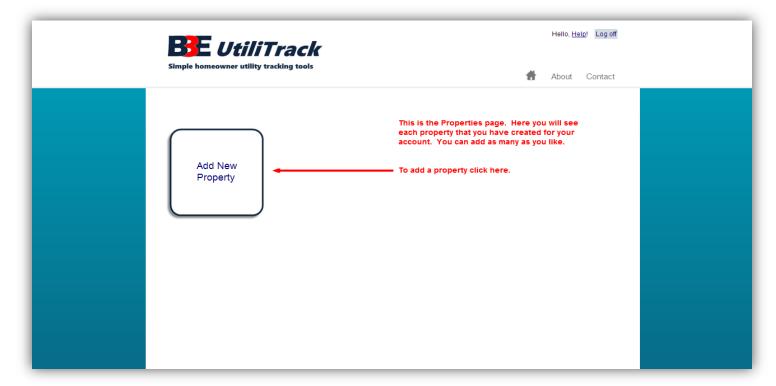
Just enter the email address that you used to sign up for your account and we'll send you an email with a link to reset your password. Click on the link in the email you receive, and you will be taken to a page where you can reset your password.

After the reset, you can log in with your user name or email address and new password and you should be ready to go.

Creating Properties

Once you are logged in your properties page should look like this before you have added any properties to track. Click on the 'Add New Property' button to enter your first property.

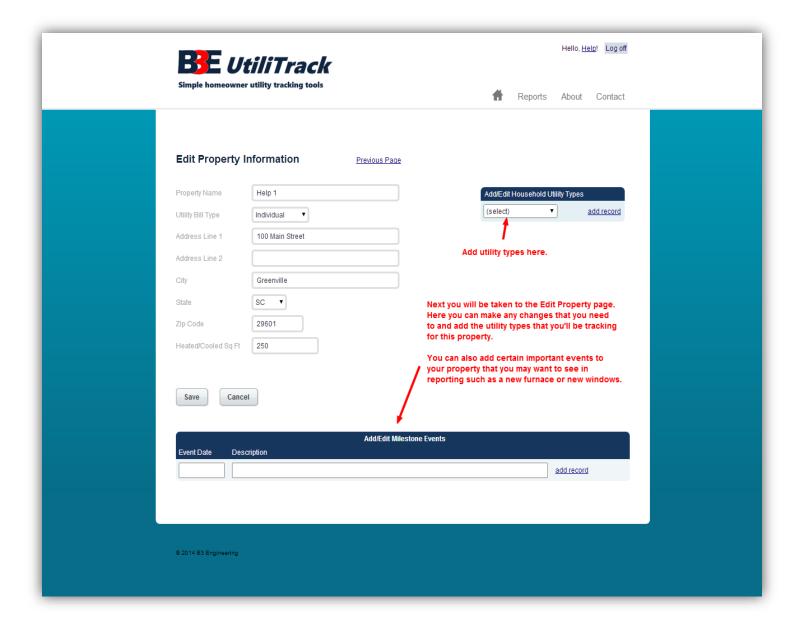That will take you to the Create Property page.

Here you will name your property, select the billing type, and enter the property address.

There are two types of billing to choose from. **Combined** is for properties that get only one bill that includes all the utilities for that property. **Individual** is for properties that get a separate bill for each utility. Click the Create button when you are finished.
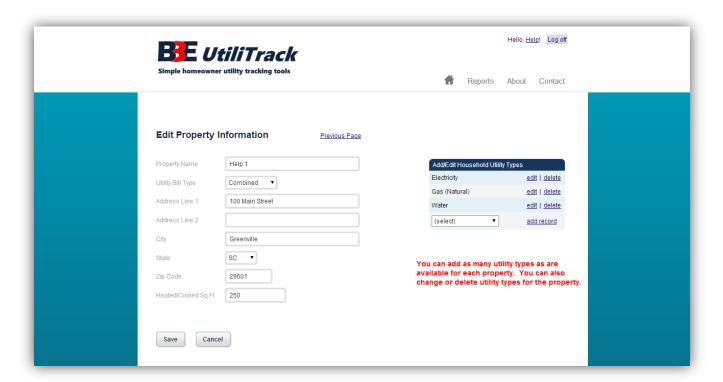

This will take you to the Edit Property page.

Here you can change any information previously entered, add or edit the utility types that you'd like to track for this property, or add or edit any milestones that you'd like to have for this property. This page can also be reached by clicking edit on the Property Details page.

There are many different utility types that you can track for each property in UtiliTrack. You can select those here.

Click the Save button when you're finished and your property will be created. Once you've created your property or properties you're home page will look like this. You can add as many as you'd like.

To edit a property, enter billing information, or run reports just click on the property box that you'd like to work with. Now you're ready to enter some billing information for your property.

Entering Utility Bills

For now, utility bills are entered manually. To begin adding data for a new bill click on the 'New Utility Bill' button on the Property Details page.

Now you will enter the beginning and ending date for the bill that you are entering. If your property is set to Individual billing then you'll also need to pick which utility the bill is for. If your property is set to Combined billing then you won't need to choose.

Individual Bill Detail Entry

For **Individual** billing enter the dollar amount of the bill and/or the usage amount of the bill and then click the 'Submit' button to complete the entry for this bill.

Combined Bill Detail Entry

For **Combined** billing you will enter all of the dollar amounts and/or usage amounts at once for the combined bill. Click the 'Submit' button when finished.
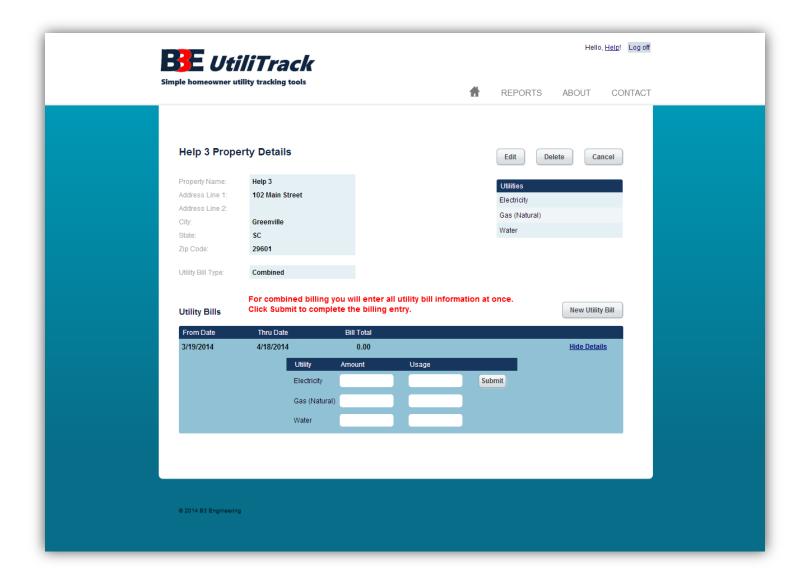
Editing and Deleting Bills

Once you've entered you utility bill's information you will see it show up on the Property Details page. You can edit or delete your bill's information from here if you need to.

- Edit Billing – This allows you to change the dates and/or the utility type (if Individual bill type) of the bill.
- Details – This allows you to view and change the usage and cost associated with the bill.
- Delete – This will delete the entire bill.

Deleting a Property

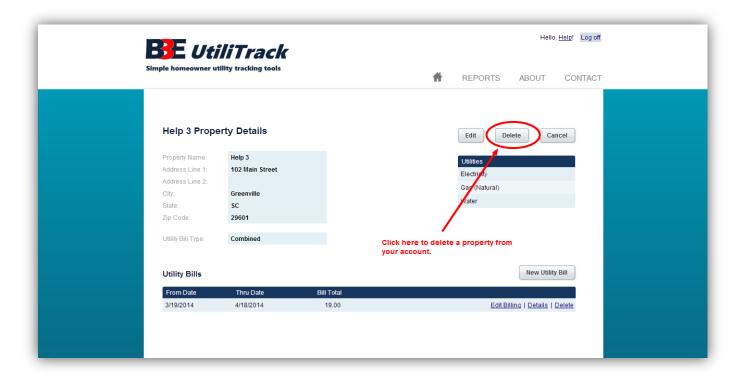If you decide that you would like to delete one or all of your properties just click on the 'Delete' button on the Property Detail page.

You'll be taken to a confirmation page to make sure that you did not click Delete in error. Click the 'Delete' button to continue with the delete. Click the 'Cancel' button to return to the Property Details page.

WARNING – Deleting a property deletes the property and all associated billing detail for that property for your account. This cannot be undone.

Reports

You can run reports directly from the dropdown menu, or you can click on Reports in the main navigation menu to get to a list of the available reports. This list will continue to grow, giving you ever-increasing ways of evaluating your data. For now, there are three reports:

- Utility Usage Comparison
- Annual Cost Comparison
- Averages By Month

Since most utility bills are for a period that spans months (ie. Jan 13th through Feb 15th), we calculate the monthly usage and costs averages a little differently. We take the dates you enter from your bill, and for each date in the period---excluding the last one, since it will be the first day of the next billing period---count the number of days, then divide the usage and the cost by the number of days. We then put those dates with their averages in a table to use for reporting.

So then when you ask to see the usage for January, we would include from the reporting table any entries between January 1st and January 31st, add them together, and come up with what your actual cost and usage was for the month.

This way the system provides numbers based on a calendar month, when bills are often for periods that span months, taking all the guesswork out of which bill applies to which month, and allows us to more accurately estimate your actual usage and cost for that month.

Utility Usage Comparison

This report shows you the monthly usage for each utility, for all years that have been entered. It is shown both in tabular form and visually with a line graph. You can remove and re-add years from the line graph by clicking on the year in the line graph's legend. This report gives you an idea of when you have the heaviest usage of any given utility that you are tracking.

Annual Cost Comparison

This report provides a cost comparison by month for each year entered so that you can see how costs are trending.

Averages By Month

This provides monthly averages based on the available entries. It takes the average across all years. Soon it will give you the opportunity to specify which years you want to take into account. This will give you an idea of what your utility bills will look like in the months ahead.