

General Energy Analysis

Field Data Collection Form

Version 3.8 - January 2026

This form is designed for field workers to collect facility-specific data on-site. Complete all relevant sections and use this form as reference when entering data into the SYNEREX UI.

1. PROJECT INFORMATION

Client/Company Name	
Project Name/ID	

Project identifier or name

Project Description	
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Brief description of the project

Facility Location

Facility Address (Street)	
City	
State/Province	
ZIP/Postal Code	
Country	

Country where facility is located

Project Location

Project Address (Street)	
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Physical location where project work is performed (if different from facility)

Project City	
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City where project work is performed

Project State/Province	
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State/Province where project work is performed

Project ZIP/Postal Code	
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ZIP/Postal code for project location

Project Country	
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Country where project work is performed

Primary Contact Information

Point of Contact Name	
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Primary contact person name

Contact Title/Role	
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Job title or role of contact person

Contact Phone	
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Contact Email

Contact Mobile/Cell

Mobile phone number (optional)

Contact Location

Contact Address (Street)

Contact person's business address (if different from facility)

Contact City

City where contact person is located

Contact State/Province

State/Province where contact person is located

Contact ZIP/Postal Code

ZIP/Postal code for contact location

Contact Country

Country where contact person is located

Additional Project Information

Project Manager Name

Name of project manager

Project Manager Email

Email of project manager

Project Manager Phone

Phone of project manager

Project Start Date

Date when project work began

Project End Date

Expected or actual project completion date

Project Date (Form Completion Date)

Date this form is being completed

Secondary Contact (Optional)

Secondary Contact Name

Alternative contact person

Secondary Contact Title/Role

Job title or role

Secondary Contact Phone

Phone number

Secondary Contact Email

Email address

2. TEST PARAMETERS

Test Type	<input type="checkbox"/> Power Quality <input type="checkbox"/> Energy Savings <input type="checkbox"/> Harmonic Analysis	
Circuit Name		
Test Period	Before:	After:
<small>Start and end dates</small>		
Test Duration		
<small>Auto-calculated from CSV data</small>		
Meter Name		
Meter Specification	<input type="checkbox"/> Class 0.2 <input type="checkbox"/> Class 0.5 <input type="checkbox"/> Class 1.0 <input type="checkbox"/> Class 2.0	
Interval Data	<input type="checkbox"/> 1-minute <input type="checkbox"/> 15-minute <input type="checkbox"/> Hourly	

3. WEATHER DATA

Temperature	Before: deg F	After: deg F
<small>Average temperature during test period</small>		
Humidity	Before: %	After: %
<small>Average relative humidity</small>		
Weather Data Source	<input type="checkbox"/> Automatic API <input type="checkbox"/> Manual Entry	

4. BILLING INFORMATION

Utility Company	
Account Number	
Energy Rate	\$/kWh
<small>Cost per kilowatt-hour</small>	
Demand Rate	\$/kW-month
<small>Cost per kilowatt per month</small>	

5. ELECTRICAL CONFIGURATION

Number of Phases	<input type="checkbox"/> 1 (Single Phase) <input type="checkbox"/> 3 (Three Phase)
Nominal Voltage	_____ V
System nominal voltage (e.g., 480V, 240V)	
Voltage Type	<input type="checkbox"/> Line-to-Line (LL) <input type="checkbox"/> Line-to-Neutral (LN)
Transformer kVA Rating	_____ kVA
Rated kVA for loss scaling calculations	
Load Loss at Rated Load	_____ W
Total load loss at rated kVA (copper + stray)	
Core Loss	_____ W
No-load core loss (constant)	
Stray Loss Fraction	_____ %
Percentage of load loss that is stray loss	

6. ADDITIONAL BILLING & FINANCIAL INFORMATION

Project Cost	_____ \$
Total project installation cost	
Last Monthly Bill (Total Cost)	_____ \$
Client's last monthly utility bill total	
Target Power Factor	_____ (0-1)
Target power factor for normalization (e.g., 0.95)	
Power Factor in Billing	<input type="checkbox"/> Included <input type="checkbox"/> NOT Included
Check if PF penalties are in billing	
Discount Rate	_____ %
Discount rate for present value calculations (e.g., 3%)	
Escalation Rate	_____ %
Annual escalation rate for savings (e.g., 2%)	
Analysis Period	_____ years
Project analysis period in years (e.g., 15)	

Non-Coincident Peak Demand Rate	_____ \$/kW-month
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Non-coincident peak demand rate

CP Demand Rate	_____ \$/kW-month
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Coincident peak demand rate

7. EQUIPMENT DESCRIPTION

Equipment Description	_____
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Description of equipment being analyzed

Circuit Name/ID	_____
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Circuit identifier or name

8. NOTES
