



MY ENGIE PORTAL GUIDE

For Customers

Updated October 29,, 2020

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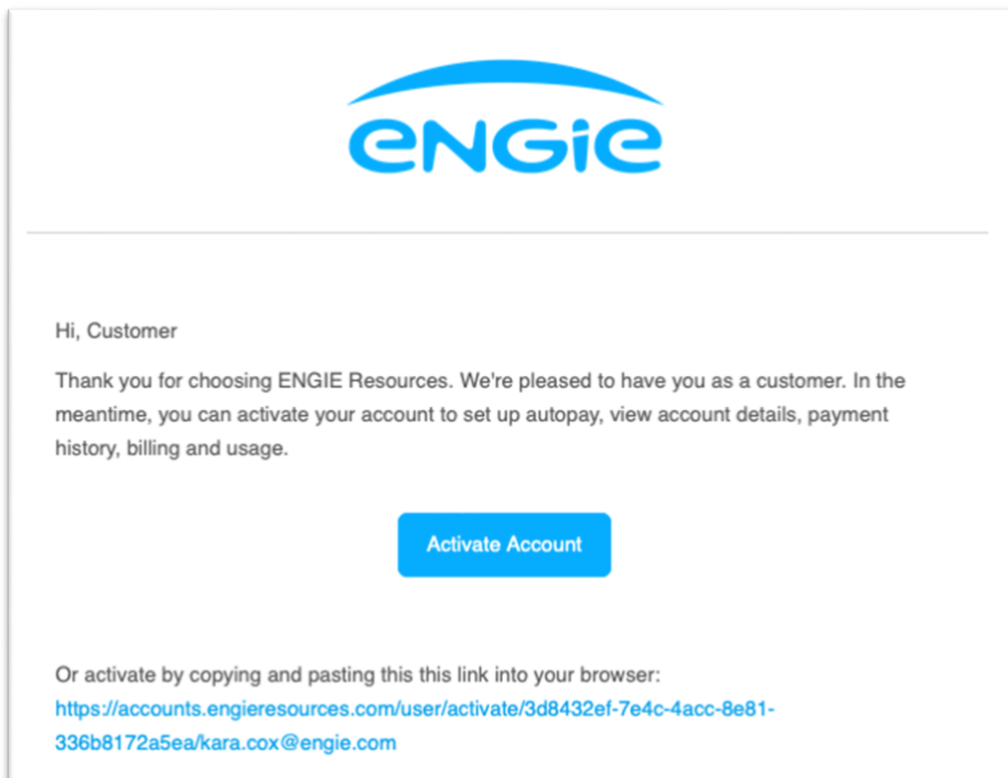
Overview

This document primarily focuses on how to use and navigate through the new ENGIE Resources Customer Portal as a Customer, which allows you to manage your account(s), add payment methods, view/pay bills, view usage, enroll in AutoPay and much more.

Activating Account

An email will be sent out to activate the account once the email is set up in the customer portal.

Please Note: If you did not receive the email, please make sure to check your Spam/Junk Folder




Once you click “Activate Account” button, you will be taken to a page where you can finish setting up your account. Enter contact information including First Name, Last Name, and Company Name (the Nickname field is an optional field). Also, you can create a new password for your account here.

Finish setting up your account


Email Address
kara.cox@engie.com

First Name _____ Preferred or Nickname _____

Last Name _____ Company Name _____

Create Password _____ 

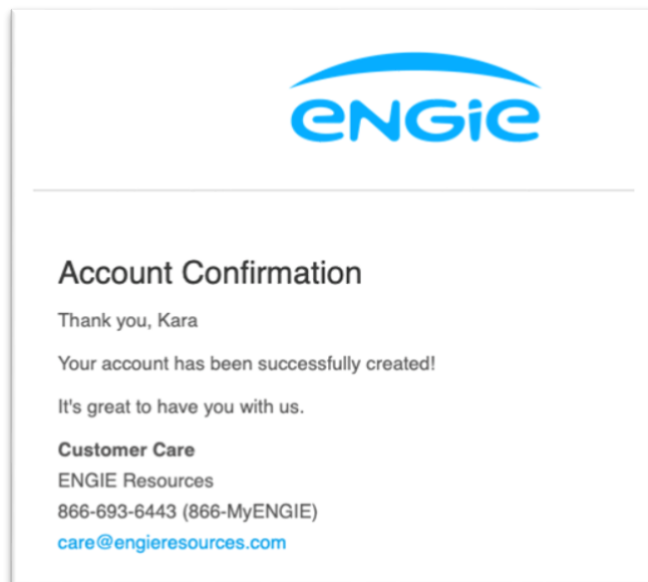
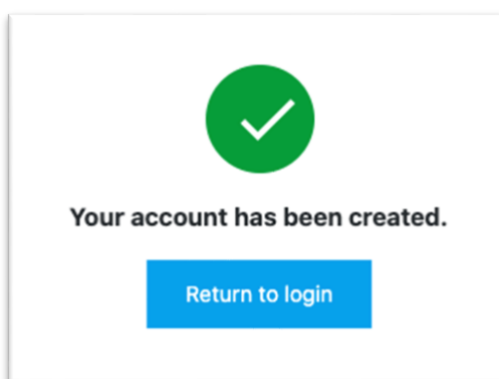
Your password must be at least 8 characters in length.

Confirm Password _____ 

Submit

By creating an account, you agree to our Terms and Conditions and Privacy Policy.

Once the user clicks “submit” they will receive a confirmation modal as well as an email to their inbox confirming their account has been created.



Didn't receive an activation email?

If you never received an activation email, please check your Spam/Junk folder first. If you are still having trouble you can resend the activation to yourself by clicking the link labelled **click here to resend activation email**.

Sign in

First time here? If you haven't activated your new account or never received an activation email [click here to resend activation email](#)

Email Address

Password

Sign in

Just need to make a payment? [Continue without signing in](#)



You can then enter in your email address to have the activation email resent to you.

*Note: Please make sure to enter the correct email address that was used for your original account registration *

Resend activation email

Email Address

Confirm **Return to sign in**

Resend activation email

✓ Activation email sent. Be sure to check your spam and junk mail folders.

Email Address

kara.cox@engie.com

Confirm **Return to sign in**

Logging In

After activating your account, you will be redirected or you can navigate to accounts.engieresources.com to log in.

Sign in

First time here? If you haven't activated your new account or never received an activation email [click here to resend activation email](#)

Email Address

Password

[Sign in](#)

Just need to make a payment? [Continue without signing in](#)

Below is the landing page you will see when you sign in. This will allow you to view your accounts or account history for your accounts.

The screenshot shows the ENGIE Customer Portal landing page for a partner. At the top left is the ENGIE logo. The main heading is "Welcome Partner". Below this, a paragraph states: "ENGIE Customer Portal is a place where everything related to your accounts is located. You can update your [profile & preferences](#), download reports, and [view all your accounts](#) all from right here." Below the text are two image-based buttons. The first button, labeled "View Accounts", features an image of hands typing on a laptop keyboard. The second button, labeled "View Account History", features an image of hands pointing at a tablet displaying a bar chart.

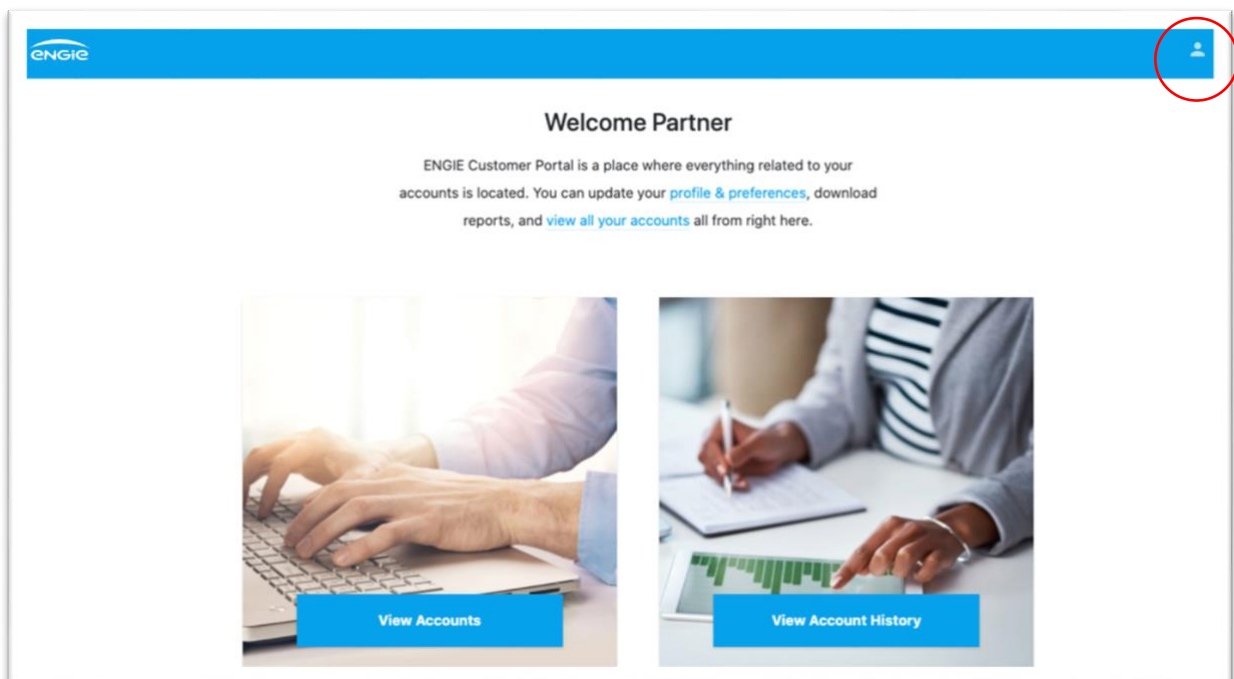
Profile & Preferences

Add/Edit Contact Info: Name, Company, Billing Address, Phone Number

On the top of your screen click on the **person icon** in the top right hand side of the blue bar. A dropdown will appear. Select **Profile & Preferences**.

**Note* Make sure when you first sign in to your new account, add/update all the information in this section so it is complete and current in our system.*

This page includes: First Name, Last Name, Preferred Name-Nickname (optional), Company Name, Address, Address Line 2 (optional), City, State, Zip Code, Phone Number. Once you update information here, scroll down to the bottom of the page and click **Save** to make changes to your profile.





My Profile & Preferences



Contact Info

Name

First Name

Partner

Last Name

Test



Preferred Name (Nickname)

Company Name

ENGIE



Billing Address

Address

Address Line 2 (Optional)

City

State

Zip Code

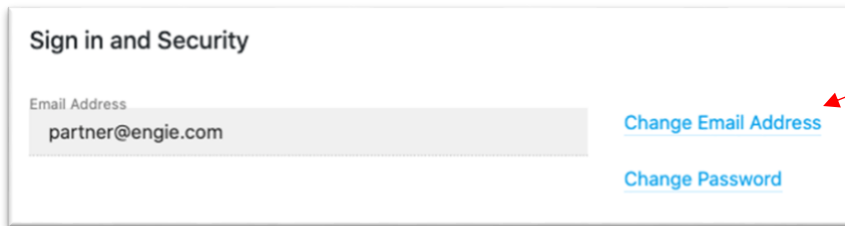


Phone

Primary

Changing Email Address

The second section on the **profile & preferences** page is **Sign in and Security**. Click on the link labelled **Change Email Address**.

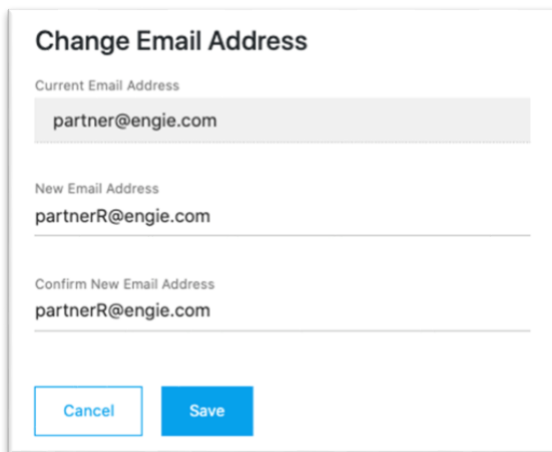


Sign in and Security

Email Address
partner@engie.com

[Change Email Address](#)

[Change Password](#)



Change Email Address

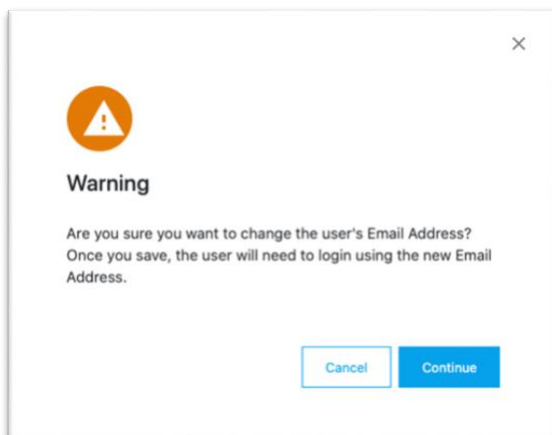
Current Email Address
partner@engie.com

New Email Address
partnerR@engie.com

Confirm New Email Address
partnerR@engie.com

[Cancel](#) [Save](#)

The current email address is shown and disabled. Enter and confirm the new email address you would like to change your online portal login to and click **save**.

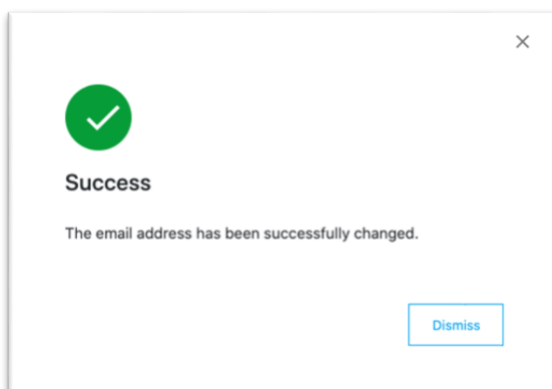


Warning

Are you sure you want to change the user's Email Address?
Once you save, the user will need to login using the new Email Address.

[Cancel](#) [Continue](#)

A warning message is displayed to have you confirm that you want to change your email associated with your online portal login. Click **Continue**.



Success

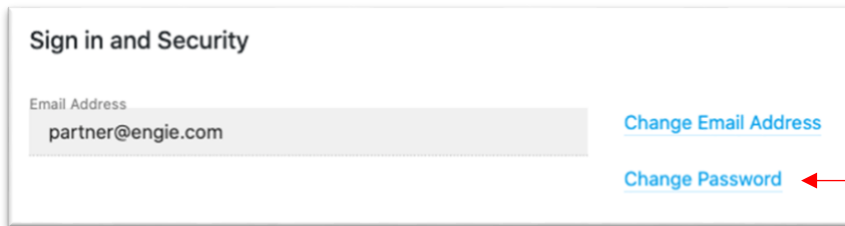
The email address has been successfully changed.

[Dismiss](#)

A success message is displayed. Once you click **dismiss**, it will take you back to the profile & preferences page where your email is updated.

Changing Password

The second section on the **profile & preferences** page is **Sign in and Security**. Click on the link labelled **Change Password**.



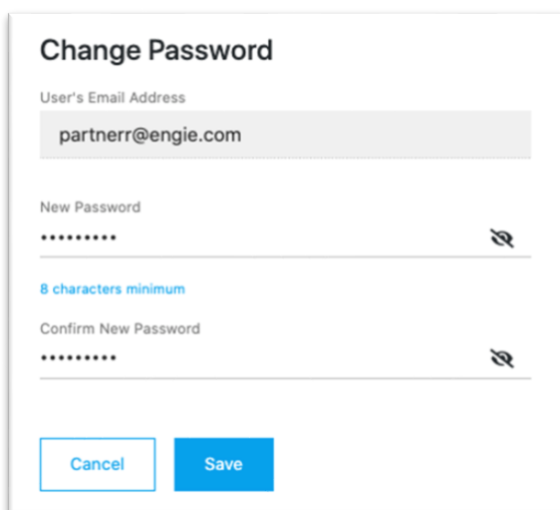
Sign in and Security

Email Address
partner@engie.com

[Change Email Address](#)

[Change Password](#)

Your current email address will be displayed and disabled. Enter and confirm your new password for the account. Click **Save** to continue. A confirmation pop up will appear.



Change Password

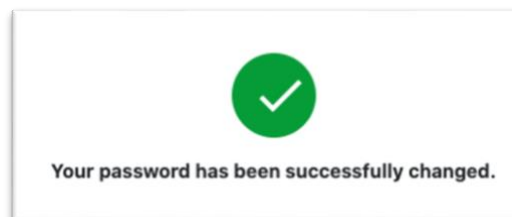
User's Email Address
partnerr@engie.com

New Password
.....

8 characters minimum

Confirm New Password
.....

[Cancel](#) [Save](#)



Set up Communication Preferences/Email Notifications

The third and last section on the **profile & preferences** page is **Communication Preferences**.

Communication Preferences

Email Address
partner@engie.com

Email Notifications


Receive an email notification when:

<input type="checkbox"/> A change is made to your user profile	<input type="checkbox"/> E-bill statement is ready
<input type="checkbox"/> You have shared a billing account	<input type="checkbox"/> Payment is received
<input type="checkbox"/> A billing account has been added or shared with you	<input type="checkbox"/> Payment is due

The email address where these notifications will be sent to is listed. Below are all of the notifications sent out. Use the checkboxes to make a selection as to which you would like to receive.

E-bill statement is ready

By selecting to receive this email notification, the email will only notify you that a statement is ready to view within the portal. This is not allowing you to receive a copy of the statement in the attachment of the email. If you would like to enroll in paperless billing to receive a PDF copy of your statement by email, please refer to the **enroll in paperless billing** section.



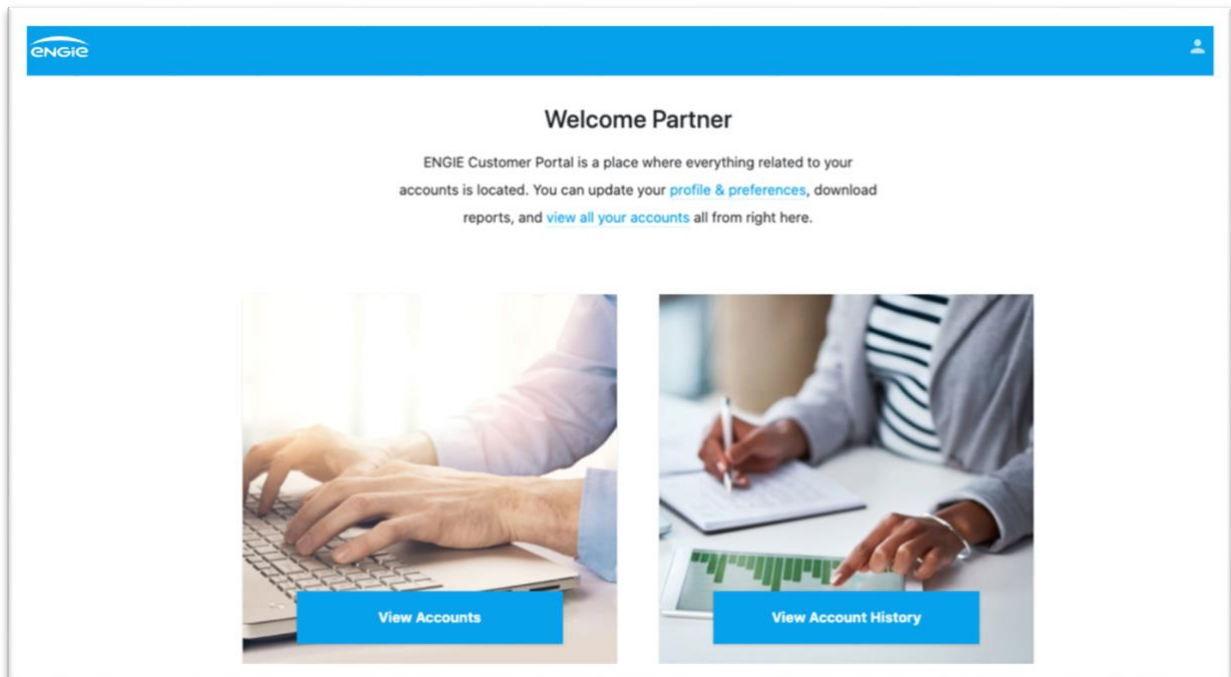
The user profile has been successfully updated.

[Back to Dashboard](#)

Click the **Save** button and a success message will appear. Click **Back to Dashboard** to return to your dashboard.

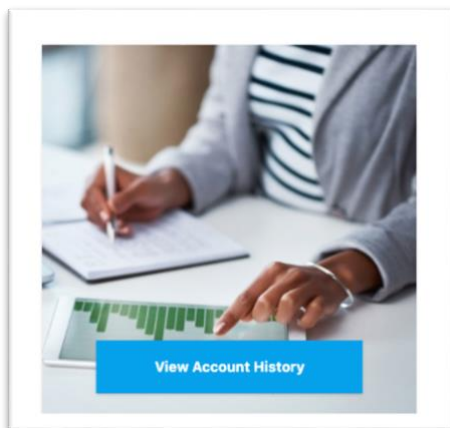
Dashboard Landing Page

Below is the landing page you will see when you sign in. This will allow you to view your accounts or account history for your accounts.



View Account History

Click on the **View Account History** tile from the dashboard page.



Account History

Account: From Date: 6/20/2020 To Date: 9/18/2020 Filter by type, status...

0000085497
 0000096522
 0000098672

BILLING ACCOUNT	TYPE	STATUS	PAYMENT AMOUNT	TRANSACTION DATE	STATEMENT PERIOD	USAGE	CURRENT CHARGES	STATEMENT BALANCE

0 to 0 of 0 << < Page 0 of 0 > >>

First select the account from the dropdown you would like to see the history of. You can then select the date range and press **Search**. This will then display all of your previous activity specific to the account you selected.

Account: 0000085497 From Date: 6/20/2020 To Date: 9/18/2020 Filter by type, status...

BILLING ACCOUNT	TYPE	STATUS	PAYMENT AMOUNT	TRANSACTION DATE	STATEMENT PERIOD	USAGE	CURRENT CHARGES	STATEMENT BALANCE
0000085497	eCheck	Pending	(\$3,195.41)	09/04/2020				
0000085497	eCheck	Pending	(\$3,400.23)	09/03/2020				
0000085497	eCheck	Pending	(\$3,195.41)	09/03/2020				
0000085497	eCheck	Pending	(\$3,195.41)	09/02/2020				
0000085497	eCheck	Cancelled	(\$2,210.57)	07/15/2020				
0000085497	eCheck	Cancelled	(\$2,210.57)	07/13/2020				
0000085497	eCheck	Cancelled	(\$2,210.57)	07/13/2020				
0000085497	eCheck	Cancelled	(\$2,210.57)	07/10/2020				
0000085497	eCheck	Cancelled	(\$2,210.57)	07/10/2020				
0000085497	eCheck	Cancelled	(\$2,210.57)	07/10/2020				

1 to 10 of 12 << < Page 1 of 2 > >>

Rows per page: 10

You can change the **rows per page** at the bottom as well as **download** the table in excel. (The download will only use the data from your selected date range.)

You can filter by billing account number, type, status, and usage. Once you start typing it will automatically narrow down the list. You don't have to press the search icon after.

Account: 0000085497 From Date: 6/20/2020 To Date: 9/18/2020 Search: can

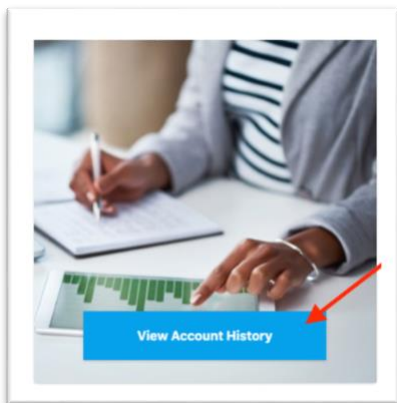
BILLING ACCOUNT	TYPE	STATUS	PAYMENT AMOUNT	TRANSACTION DATE	STATEMENT PERIOD	USAGE	CURRENT CHARGES	STATEMENT BALANCE
0000085497	eCheck	Cancelled	(\$2,210.57)	07/15/2020				
0000085497	eCheck	Cancelled	(\$2,210.57)	07/13/2020				
0000085497	eCheck	Cancelled	(\$2,210.57)	07/13/2020				
0000085497	eCheck	Cancelled	(\$2,210.57)	07/10/2020				
0000085497	eCheck	Cancelled	(\$2,210.57)	07/10/2020				
0000085497	eCheck	Cancelled	(\$2,210.57)	07/10/2020				
0000085497	eCheck	Cancelled	(\$2,210.57)	07/10/2020				
0000085497	eCheck	Cancelled	(\$2,210.57)	07/10/2020				
0000085497	eCheck	Cancelled	(\$2,210.57)	07/10/2020				

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Cancel a Pending Payment

Note- a payment can only be cancelled if the status is 'pending'

Click on the **View Account History** tile from the **Dashboard** page



Locate the payment in the table. Click on the **blue 'x' icon** next to the **scheduled** payment

0000098672	eCheck	Scheduled ✕	05/27/2020	(\$3,047.39)	\$0.00
0000098672	eCheck	Pending	05/27/2020	(\$3,047.39)	\$0.00

A confirmation modal appears. Click **Cancel Payment** to continue.

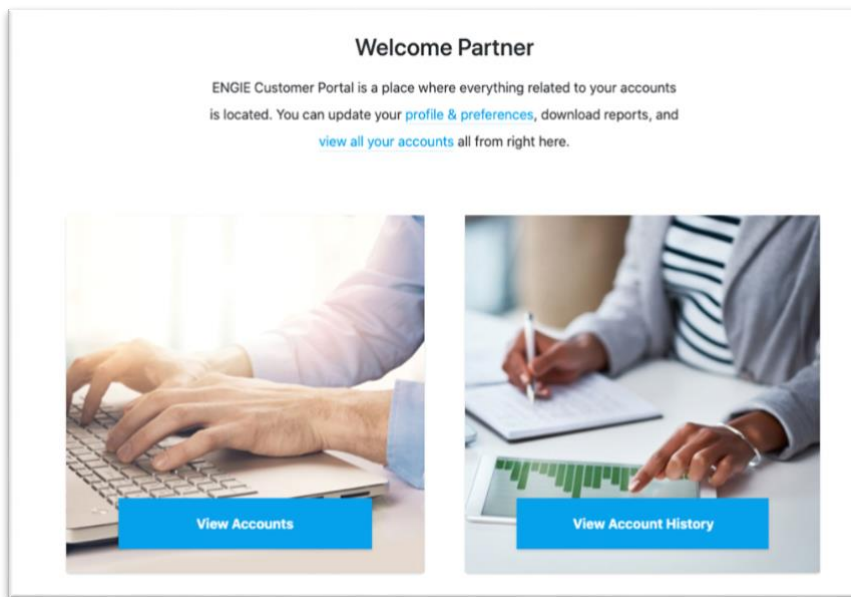
✕

Cancel Scheduled Payment

Are you sure you want to cancel this payment?

Don't Cancel
Cancel Payment

View Your Account(s) (3 Scenarios)



When navigating to the “View Accounts” tile, it will direct you to the screen appropriate depending on your accounts. There are three possible views: Account List View, Account Detail View, and Account Summary (Summary Bill). Locate the selection below that looks like the view you have within your portal.

View Your Account(s) - Scenario 1: Account List View

This view is when a user is associated with multiple billing accounts.

The screenshot displays the ENGIE user interface for viewing multiple accounts. The header shows the ENGIE logo and a user profile icon. The main heading is "ENGIE - 3 Account(s)". Below this is a search bar with the placeholder text "Search by account, name, address..." and a "Save column preferences" button. The accounts are listed in a table with the following columns: BILLING ACCOUNT, UTILITY ACCOUNT, STATUS, SERVICE START, SERVICE ADDRESS, UTILITY, OWNER, STATEMENT BALANCE, and DUE BY. Each row includes a checkbox, a "PAY" button, and a menu icon. The table shows three accounts with their respective details.

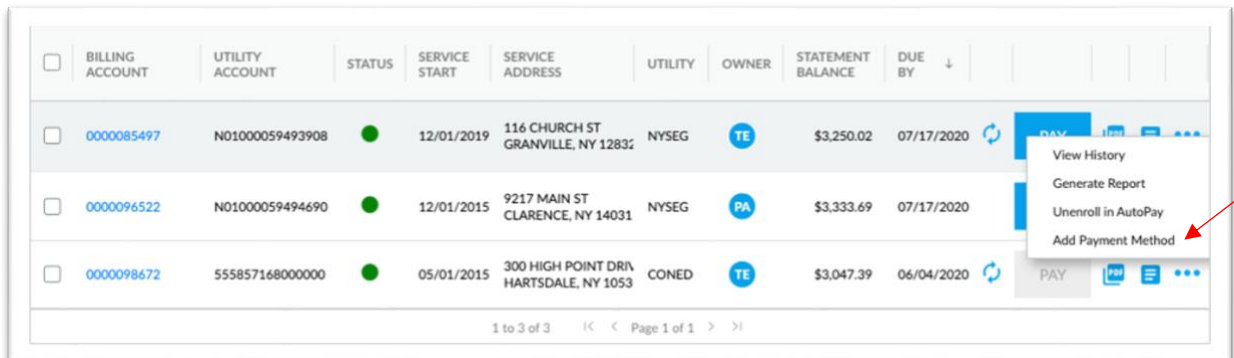
<input type="checkbox"/>	BILLING ACCOUNT	UTILITY ACCOUNT	STATUS	SERVICE START	SERVICE ADDRESS	UTILITY	OWNER	STATEMENT BALANCE	DUE BY			
<input type="checkbox"/>	0000085497	N01000059493908	●	12/01/2019	116 CHURCH ST GRANVILLE, NY 12832	NYSEG	TE	\$3,250.02	07/17/2020	🔄	PAY	📄 📅 ⋮
<input type="checkbox"/>	0000096522	N01000059494690	●	12/01/2015	9217 MAIN ST CLARENCE, NY 14031	NYSEG	PA	\$3,333.69	07/17/2020		PAY	📄 📅 ⋮
<input type="checkbox"/>	0000098672	555857168000000	●	05/01/2015	300 HIGH POINT DRIV HARTSDALE, NY 10531	CONED	TE	\$3,047.39	06/04/2020	🔄	PAY	📄 📅 ⋮

1 to 3 of 3 | Page 1 of 1

Rows per page: 10 | Export to Excel

Add/Delete a Payment Method

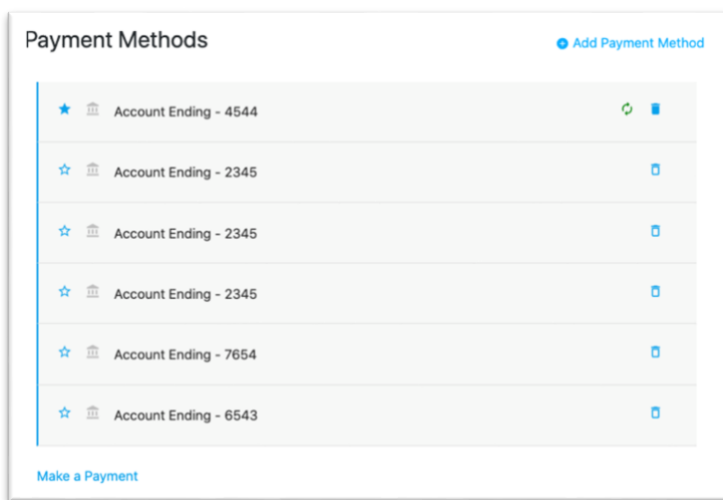
From your account list view, click on the three blue horizontal dots to display more options. Click on the **Add Payment Method** option.



<input type="checkbox"/>	BILLING ACCOUNT	UTILITY ACCOUNT	STATUS	SERVICE START	SERVICE ADDRESS	UTILITY	OWNER	STATEMENT BALANCE	DUE BY			
<input type="checkbox"/>	0000085497	N01000059493908	●	12/01/2019	116 CHURCH ST GRANVILLE, NY 12832	NYSEG	TE	\$3,250.02	07/17/2020	🔄	⋮	
<input type="checkbox"/>	0000096522	N01000059494690	●	12/01/2015	9217 MAIN ST CLARENCE, NY 14031	NYSEG	PA	\$3,333.69	07/17/2020		⋮	
<input type="checkbox"/>	0000098672	555857168000000	●	05/01/2015	300 HIGH POINT DR HARTSDALE, NY 1053	CONED	TE	\$3,047.39	06/04/2020	🔄	⋮	

1 to 3 of 3 | < < Page 1 of 1 > >

View History
Generate Report
Unenroll in AutoPay
Add Payment Method



Payment Methods

[Add Payment Method](#)

- ★ Account Ending - 4544
- ★ Account Ending - 2345
- ★ Account Ending - 2345
- ★ Account Ending - 2345
- ★ Account Ending - 7654
- ★ Account Ending - 6543

[Make a Payment](#)

This page will display all your current payment methods for this account.

Add Payment Method

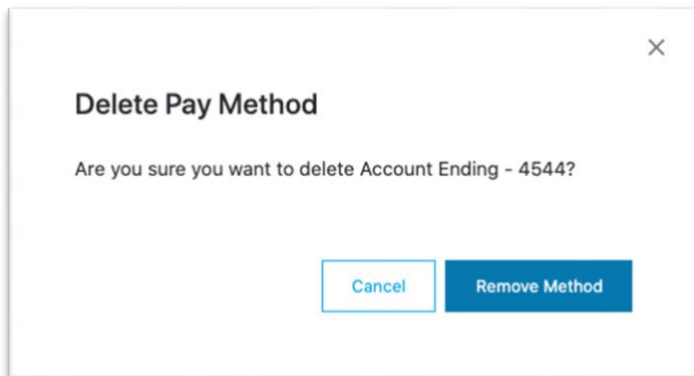
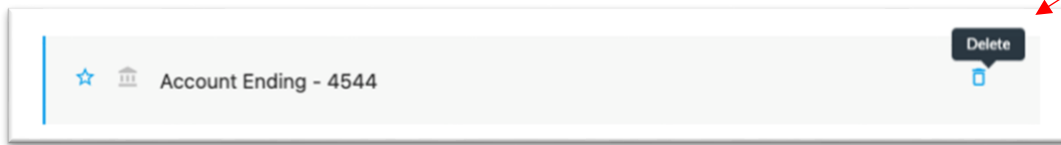
At the top right of the page there will be a **Add Payment Method** link.

Select this to be taken to a pop up that will have you enter in payment information. Please note at this time payments can only be made from a checking or savings account.

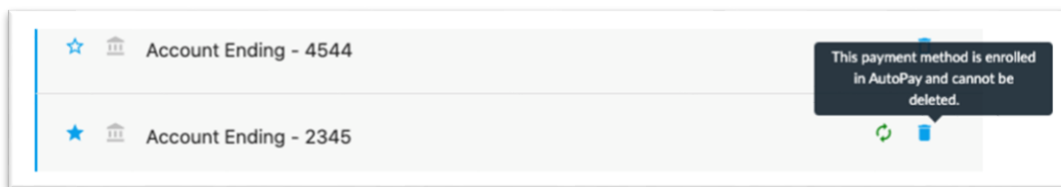
The required fields are shown to the left including: Routing #, Checking/Savings dropdown, Account Number, Re-enter account number, Company Name, and Postal Code.

Click **Save**, and you will see a confirmation message that your payment method has been added.

Delete Payment Method



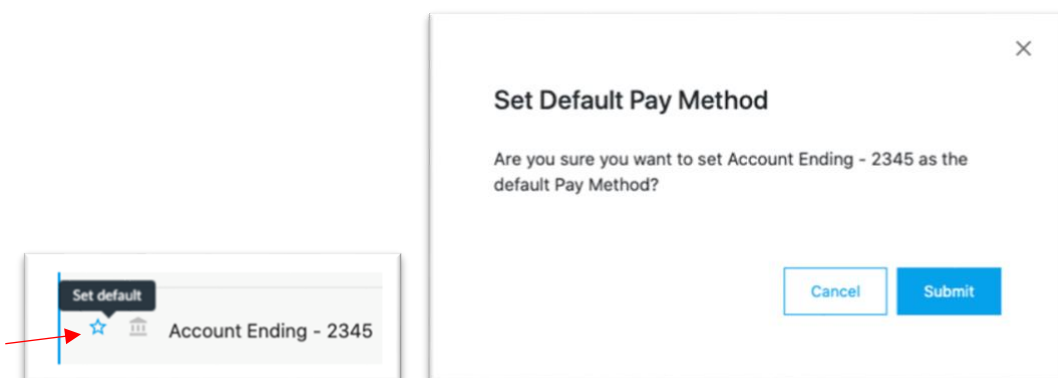
If you no longer need a payment method, you can remove it from the list. Click on the trash can icon to the right of the payment method to delete it. A pop up will appear asking you to confirm you want to delete the payment method. Click **Remove Method** to continue. The payment method will then be removed from the list.



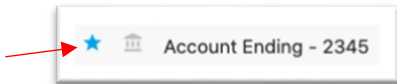
Please note that a payment **cannot** be deleted if it is the payment method that is enrolled in AutoPay. AutoPay is always tied to the default payment method. If you do want to delete a payment method that is associated with AutoPay, change the default payment method and it will tie AutoPay with that payment method.

Default Payment Method

To change the default payment method, click on the star next to the account you would like to change it to.



A pop up will appear, asking you to confirm you want to set it as the default pay method. Select **Submit** to continue. A blue star icon will now appear next to the new default pay method.



Make a Payment

From your account list view, on the right side, click on the **Pay** button.

<input type="checkbox"/>	BILLING ACCOUNT	UTILITY ACCOUNT	STATUS	SERVICE START	SERVICE ADDRESS	UTILITY	OWNER	STATEMENT BALANCE	DUE BY			
<input type="checkbox"/>	0000085497	N01000059493908	●	12/01/2019	116 CHURCH ST GRANVILLE, NY 12832	NYSEG	TE	\$3,250.02	07/17/2020		PAY	

The button will be disabled if there is no balance on the account. If the button is enabled you can click it to make a payment. It will direct you to the **Payment** screen.

Total Amount Due

\$3,195.41

AutoPay applied for Jul 17

[View Bill](#)

Please Note: This is the final step to submit your payment. Be sure to double check that all of your information is correct!

Payment Amount

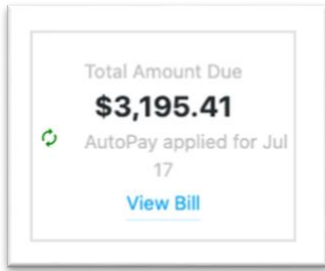
Payment Date

9/18/2020

Payments can be scheduled up to and including your due date. Please select a date between today and your next due date.

Payment Method

Submit Payment

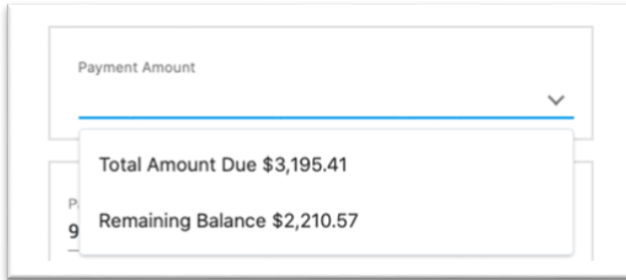


The top section will show your total amount due and if it is enrolled in AutoPay, a message will appear here to indicate that. You can still proceed even though you are enrolled in AutoPay if you want to make a one-time payment.

[View Bill](#)

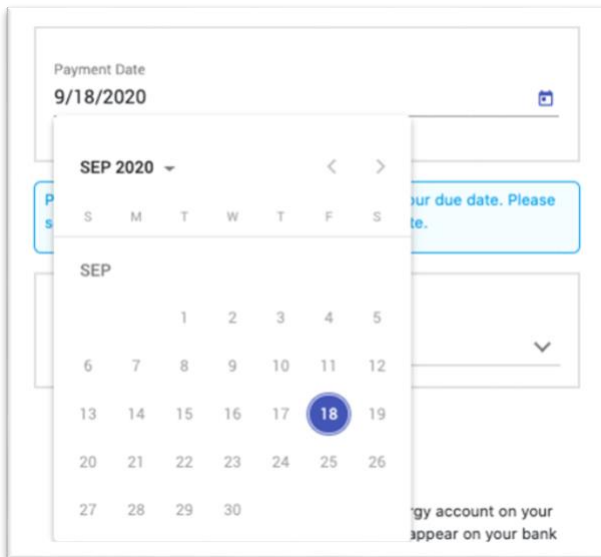
You can also view your bill you are paying on here. This will open up a PDF of the statement.

Payment Amount



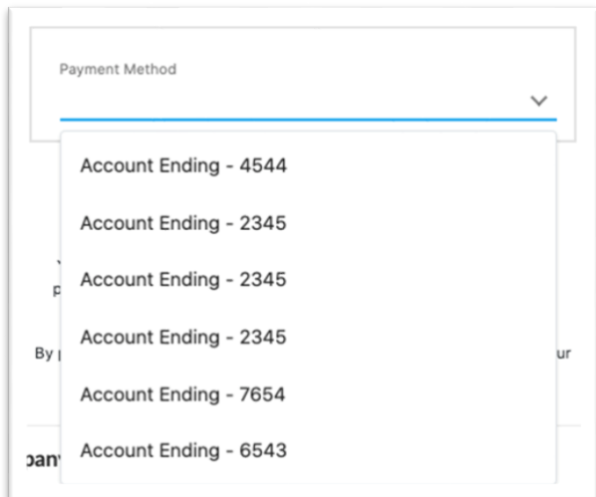
When clicking on the caret (down arrow), you will see the total amount due and the remaining balance.

Payment Date



The payment date will automatically default to the current day. Payments can be scheduled up to and including your due date.

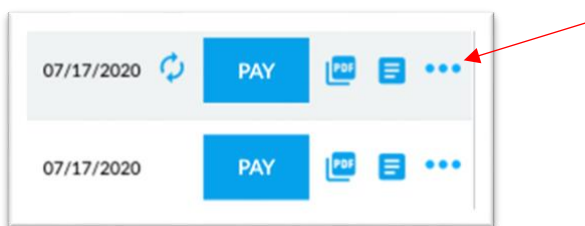
Payment Method



When clicking on the caret (down arrow), you will see all of your payment methods that have been added. Click on the payment method you would like to use, then click the **submit payment** button. You will receive a confirmation message saying that your payment has been made.

Update Billing Address

From your account list view, click on the additional options icon on the right side of the account you would like to update.



Select **Update Billing Address** from the dropdown.

<input type="checkbox"/>	BILLING ACCOUNT	UTILITY ACCOUNT	STATUS	SERVICE START	SERVICE ADDRESS	UTILITY	OWNER	STATEMENT BALANCE	DUE BY			
<input type="checkbox"/>	0000085497	N01000059493908	●	12/01/2019	116 CHURCH ST GRANVILLE, NY 12832	NYSEG	TE	\$3,250.02	07/17/2020		PAY	
<input type="checkbox"/>	0000096520	N01000059305813	●	12/01/2015	6785 TRANSIT RD BUFFALO, NY 14221	NYSEG	TE	\$3,029.15	07/17/2020			Update Billing Address Unenroll in AutoPay
<input type="checkbox"/>	0000098672	555857168000000	●	05/01/2015	300 HIGH POINT DRIV HARTSDALE, NY 10531	CONED	TE	\$3,047.39	06/04/2020			View History Generate Report
<input type="checkbox"/>	0000101057	4723390010	●	09/01/2012	12500 N 400 E VM PL FAIRMOUNT, IL 61841	AMEREN I		\$18,823.12	05/26/2020			Share Account Transfer Account Release Account
<input type="checkbox"/>			●		1341 S WASHINGTON							

This will take you to **Update Billing Address** screen where you can update information here and click **save**.

Update Billing Address

Apply a single billing address to multiple accounts

Selected Accounts
0000085497

Address Line 1

Address Line 2

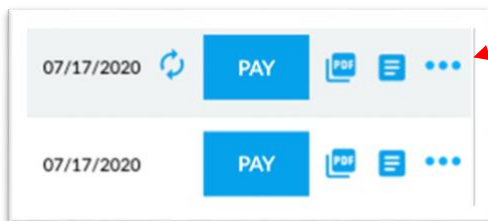
City _____ State _____

Postal Code

Billing Email Address

View Account History

From your account list view, click on the three blue horizontal dots to display more options.



Click on the **View History** option.

<input type="checkbox"/>	BILLING ACCOUNT	UTILITY ACCOUNT	STATUS	SERVICE START	SERVICE ADDRESS	UTILITY	OWNER	STATEMENT BALANCE	DUE BY			
<input type="checkbox"/>	0000085497	N01000059493908	●	12/01/2019	116 CHURCH ST GRANVILLE, NY 12832	NYSEG	TE	\$3,250.02	07/17/2020			
<input type="checkbox"/>	0000096522	N01000059494690	●	12/01/2015	9217 MAIN ST CLARENCE, NY 14031	NYSEG	PA	\$3,333.69	07/17/2020			
<input type="checkbox"/>	0000098672	555857168000000	●	05/01/2015	300 HIGH POINT DR HARTSDALE, NY 1053	CONED	TE	\$3,047.39	06/04/2020			

- View History
- Generate Report
- Unenroll in AutoPay
- Add Payment Method

1 to 3 of 3 < < Page 1 of 1 > >

The account will default to the account you are on. You can then select the date range and press **Search**. This will then display all of your previous activity specific to the account you selected.

Account: 0000085497 From Date: 6/20/2020 To Date: 9/18/2020 Search Filter by type, status...

BILLING ACCOUNT	TYPE	STATUS	PAYMENT AMOUNT	TRANSACTION DATE	STATEMENT PERIOD	USAGE	CURRENT CHARGES	STATEMENT BALANCE
0000085497	eCheck	Pending	(\$3,195.41)	09/04/2020				
0000085497	eCheck	Pending	(\$3,400.23)	09/03/2020				
0000085497	eCheck	Pending	(\$3,195.41)	09/03/2020				
0000085497	eCheck	Pending	(\$3,195.41)	09/02/2020				
0000085497	eCheck	Cancelled	(\$2,210.57)	07/15/2020				
0000085497	eCheck	Cancelled	(\$2,210.57)	07/13/2020				
0000085497	eCheck	Cancelled	(\$2,210.57)	07/13/2020				
0000085497	eCheck	Cancelled	(\$2,210.57)	07/10/2020				
0000085497	eCheck	Cancelled	(\$2,210.57)	07/10/2020				
0000085497	eCheck	Cancelled	(\$2,210.57)	07/10/2020				

1 to 10 of 12 Page 1 of 2 Rows per page: 10 Export to Excel

You can change the **rows per page** at the bottom as well as **download** the table in excel. (The download will only use the data from your selected date range.)

You can filter by billing account number, type, status, and usage. Once you start typing it will automatically narrow down the list. You don't have to press the search icon after.

Account: 0000085497 From Date: 6/20/2020 To Date: 9/18/2020 Search can

BILLING ACCOUNT	TYPE	STATUS	PAYMENT AMOUNT	TRANSACTION DATE	STATEMENT PERIOD	USAGE	CURRENT CHARGES	STATEMENT BALANCE
0000085497	eCheck	Cancelled	(\$2,210.57)	07/15/2020				
0000085497	eCheck	Cancelled	(\$2,210.57)	07/13/2020				
0000085497	eCheck	Cancelled	(\$2,210.57)	07/13/2020				
0000085497	eCheck	Cancelled	(\$2,210.57)	07/10/2020				
0000085497	eCheck	Cancelled	(\$2,210.57)	07/10/2020				
0000085497	eCheck	Cancelled	(\$2,210.57)	07/10/2020				
0000085497	eCheck	Cancelled	(\$2,210.57)	07/10/2020				
0000085497	eCheck	Cancelled	(\$2,210.57)	07/10/2020				

1 to 8 of 8 Page 1 of 1

Cancel a Pending Payment

Note- a payment can only be cancelled if the status is 'pending'

Locate the payment in the table. Click on the **blue 'x' icon** next so the **scheduled** payment

0000098672	eCheck	Scheduled	05/27/2020	(\$3,047.39)	\$0.00
0000098672	eCheck	Scheduled	05/27/2020	(\$3,047.39)	\$0.00

A confirmation modal appears. Click **Cancel Payment** to continue.

✕

Cancel Scheduled Payment

Are you sure you want to cancel this payment?

Don't Cancel
Cancel Payment

Share Account(s)

Use this feature if you would like to share an account to another email/user and also have it on your account list view to access.

From the account list view, click on the three blue horizontal dots on the right of the account to display additional options.

<input type="checkbox"/>	BILLING ACCOUNT	UTILITY ACCOUNT	STATUS	SERVICE START	SERVICE ADDRESS	UTILITY	OWNER	STATEMENT BALANCE	DUE BY				
<input type="checkbox"/>	0000084914	522518023300007	●	02/01/2020	940 WYNNEWOOD R PELHAM MANOR, NY	CONED	TE	\$206.64	05/29/2020	PAY			
												Additional Options	

Select **Share Account** from the menu options.

- View History
 - Generate Report
 - Share Account ←
 - Transfer Account
 - Release Account
 - Enroll in AutoPay
 - Add Payment Method

Share Accounts

Enter the email address of the person you would like to share the accounts with. This will allow the user to access the same account with limited permissions.

Accounts Selected
0000084914

Email
test@engie.com, test1@engie.com

Role

Access Type

If you need additional assistance visit our [Help Center](#) for additional information on how to get in touch with us.

The **Share Accounts** screen will appear where you can enter one or more email address in which you want to share the specified account with.

Under the **Role** dropdown, select either *Customer* or *Partner*.

Email
test@engie.com, test2@engie.com

Role
Customer

Customer

Partner

There are three different **Access Types** associated with both **Customer/Partner** Roles. Select the access type you would like the email to have permissions for.

Role
Customer

Access Type

Sharee

Power Sharee

Read Only

- Sharee

With Sharee access, a user can view all information pertinent to the account, edit their user profile, pay bills, edit payment information, enroll in autopay & paperless billing, view account history, and generate reports.

- Power Sharee

*With Power Sharee access, a user can perform all actions a **Sharee** can, but also can Share, Transfer, and Release Accounts.*

Role
Partner

Access Type

Sharee

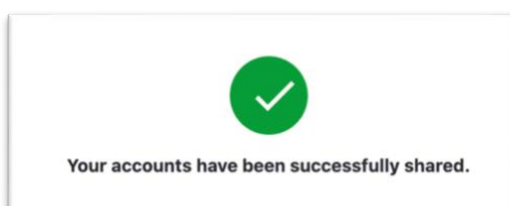
Power Sharee

Read Only

- Read Only

With Read Only access, a user can view all information pertinent to the account, however, they are only able to edit their user profile.


After selecting the Role and Access Type, Click **Share**. A message is displayed that the account(s) have been shared.



Transfer Account(s)

User this feature if you would like to transfer an account to another email/user and no longer have it on your account list view.

From the account list view, click on the three blue horizontal dots on the right of the account to display additional options.

<input type="checkbox"/>	BILLING ACCOUNT	UTILITY ACCOUNT	STATUS	SERVICE START	SERVICE ADDRESS	UTILITY	OWNER	STATEMENT BALANCE	DUE BY			
<input type="checkbox"/>	0000084914	522518023300007	●	02/01/2020	940 WYNNEWOOD R PELHAM MANOR, NY	CONED	TE	\$206.64	05/29/2020	PAY		Additional Options

- View History
- Generate Report
- Share Account
- Transfer Account
- Release Account
- Enroll in AutoPay
- Add Payment Method

Transfer Accounts

Enter the email address of the person you would like to transfer the accounts to. This will make them the new owner of the accounts shown.

Accounts Selected

0000084914

Email
test@engie.com, test1@engie.com

Role

Access Type

[Cancel](#) [Transfer](#)

If you need additional assistance visit our [Help Center](#) for additional information on how to get in touch with us.

Role
Customer

Access Type

- Owner
- Sharee
- Power Sharee
- Read Only

Enter in the email(s) of the users you would like to transfer the account to.

Under the **Role** dropdown, select **customer**. Under the **Access Type** dropdown there are 4 options to choose from.

- Owner

With Owner access, the user will have access to everything you had as the owner.

- Sharee

With Sharee access, a user can view all information pertinent to the account, edit their user profile, pay bills, edit payment information, enroll in autopay & paperless billing, view account history, and generate reports.

- Power Sharee

*With Power Sharee access, a user can perform all actions a **Sharee** can, but also can Share, Transfer, and Release Accounts.*

- Read Only


With Read Only access, a user can view all information pertinent to the account, however, they are only able to edit their user profile.

Once you have selected an **Access Type**, click **Transfer**. You will receive a success message.

Release Account(s)

User this feature if you no longer need to be the owner of an account, and the account(s) will be released from your account list.

From the account list view, click on the three blue horizontal dots on the right of the account to display additional options.

<input type="checkbox"/>	BILLING ACCOUNT	UTILITY ACCOUNT	STATUS	SERVICE START	SERVICE ADDRESS	UTILITY	OWNER	STATEMENT BALANCE	DUE BY			
<input type="checkbox"/>	0000084914	522518023300007	●	02/01/2020	940 WYNNEWOOD R PELHAM MANOR, NY	CONED	TE	\$206.64	05/29/2020	PAY		Additional Options

- View History
- Generate Report
- Share Account
- Transfer Account
- Release Account
- Enroll in AutoPay
- Add Payment Method

Click on **Release Account**. A new page will appear that shows the account(s) you would like to release. Click **Release** to continue. If the account has a status=dropped as well as zero balance your request will be successful and the account will be removed from your account list view.

Release Accounts

Review the accounts you no longer need to be the owner of and they will be released from your account list.

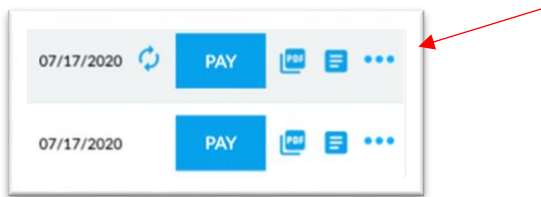
Accounts Selected

0000061623

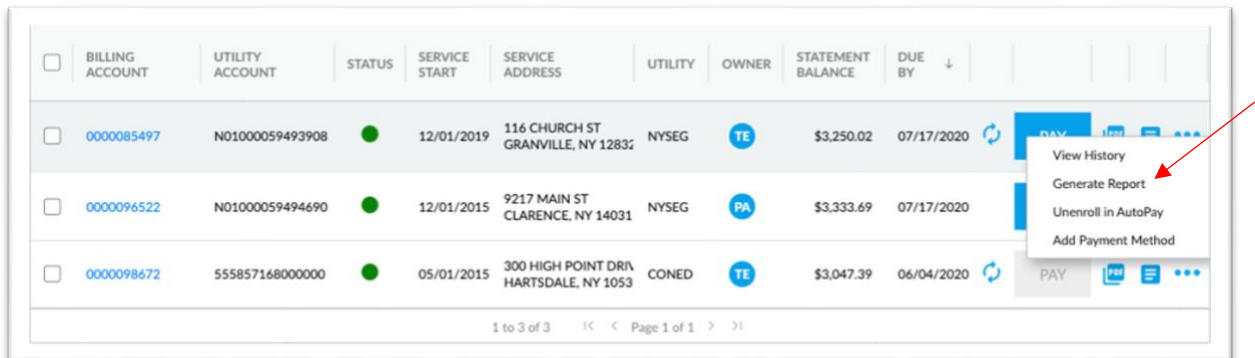
If you need additional assistance visit our [Help Center](#) for additional information on how to get in touch with us.

Generate Report

From the account list view, click on the three blue horizontal dots to display additional options.



Click on the **Generate Report** option.



Generate Report

Create a custom report by selecting a date range and selecting specific billing/metering information.

Select Billed Dates

Choose from date Choose to date

The **Generate Report** page displays a date range for the report. The page will default to the *To* billed date and the *From* billed date.

Select Report Data Fields

Billing Information	Meter Information
<input type="checkbox"/> <i>Select All</i>	<input type="checkbox"/> <i>Select All</i>
<input type="checkbox"/> Statement Id	<input type="checkbox"/> Statement Date
<input type="checkbox"/> Statement Date	<input type="checkbox"/> Contract Name
<input type="checkbox"/> Contract Name	<input type="checkbox"/> Customer Name
<input type="checkbox"/> Customer Name	<input type="checkbox"/> Supplier Account Name
<input type="checkbox"/> Supplier Account Name	<input type="checkbox"/> Billing Account Number
<input type="checkbox"/> Billing Account Number	<input type="checkbox"/> Utility Account Number
<input type="checkbox"/> Utility Account Number	<input type="checkbox"/> Client Id
<input type="checkbox"/> Billing Address	<input type="checkbox"/> Meter Number
<input type="checkbox"/> Service Address	<input type="checkbox"/> Meter Multiplier
<input type="checkbox"/> Transaction Type	<input type="checkbox"/> Beginning Meter Read
<input type="checkbox"/> From Date	<input type="checkbox"/> Start Date
<input type="checkbox"/> To Date	<input type="checkbox"/> End Date
<input type="checkbox"/> kWh Usage	<input type="checkbox"/> Quantity
<input type="checkbox"/> Previous Balance	<input type="checkbox"/> Measurement Unit

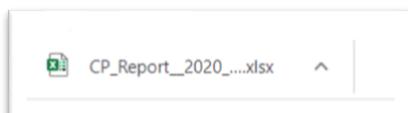
The page will display fields under two columns/sections: **Billing** and **Meter** information.

Select the checkboxes next to the items you wish to have in the report.

Save Preferences

At the bottom of the page there is a toggle that you can turn on to save your preferences if you'd like to run the same report the next time you come into this page for the account.

Click **Generate Report** and an Excel download will appear at the bottom of your browser.



The excel file will have 2 tabs, one for **Billing Info** and one for **Meter Info**.

Billing Information



Customer Name	Supplier Account Number	Utility Account Number
VALGREEN CO.	1837773	N01000059493908
VALGREEN CO.	1837773	N01000059493908
VALGREEN CO.	1837773	N01000059493908
VALGREEN CO.	1837773	N01000059493908
VALGREEN CO.	1837773	N01000059493908
VALGREEN CO.	1837773	N01000059493908

Billing Meter

Billing Meter

Enroll in AutoPay

When you are on your account list view, click on the three horizontal blue dots at the right of the account you wish to enroll in AutoPay. If an account is enrolled in AutoPay, there will be a blue icon stating it is enrolled.



<input type="checkbox"/>	BILLING ACCOUNT	UTILITY ACCOUNT	STATUS	SERVICE START	SERVICE ADDRESS	UTILITY	OWNER	STATEMENT BALANCE	DUE BY			
<input type="checkbox"/>	0000085497	N01000059493908	●	12/01/2019	116 CHURCH ST GRANVILLE, NY 12832	NYSEG	TE	\$3,250.02	07/17/2020			
<input type="checkbox"/>	0000096522	N01000059494690	●	12/01/2015	9217 MAIN ST CLARENCE, NY 14031	NYSEG	PA	\$3,333.69	07/17/2020			
<input type="checkbox"/>	0000098672	555857168000000	●	05/01/2015	300 HIGH POINT DRIV HARTSDALE, NY 1053	CONED	TE	\$3,047.39	06/04/2020			

Click the option **Enroll in AutoPay**. This will take you to the **AutoPay & Paperless Billing** page for that specific account.

AutoPay & Paperless Billing

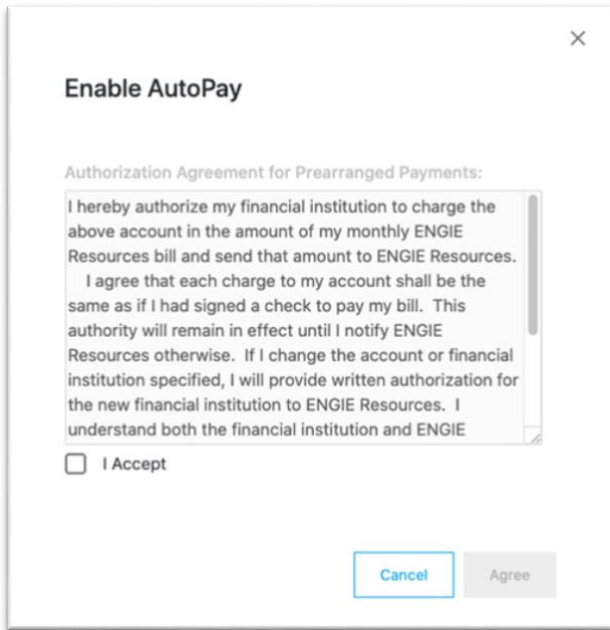
Account number: 0000085497

AutoPay

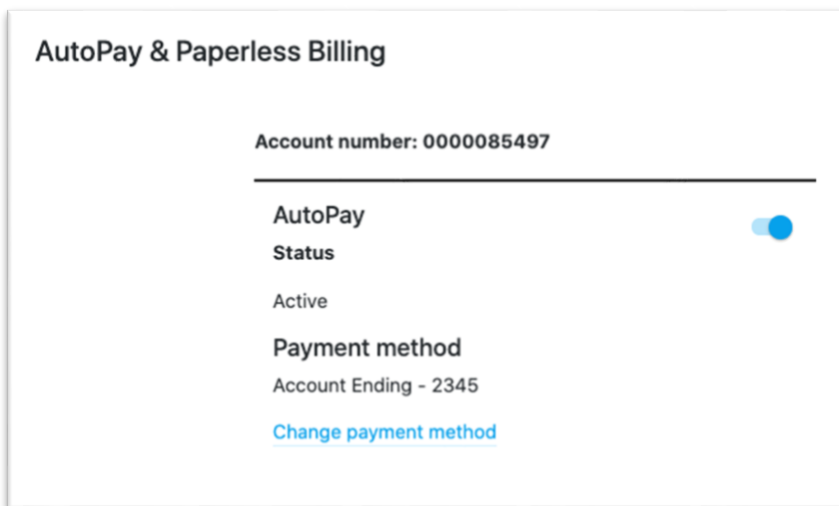
Status

Inactive

Click on the toggle to turn on. This will display a confirmation to authorize AutoPay for the account selected. Select the checkbox next to **I Accept**. Then the **Agree** button will be enabled to select.



The toggle is now on and active with the default payment method used.



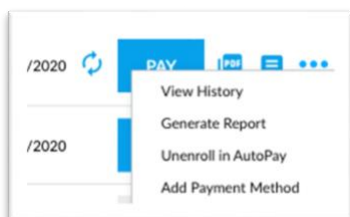
Un-Enroll in AutoPay

When you are on your account list view, click on the three horizontal blue dots at the right of the

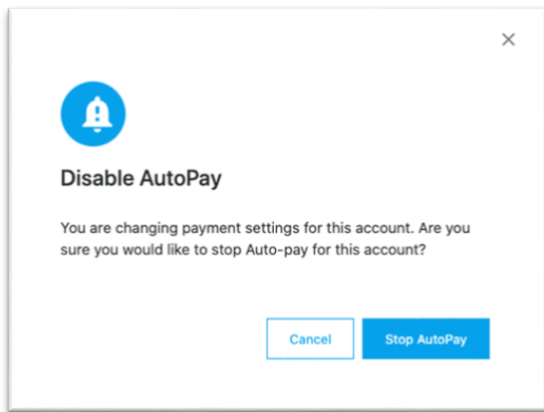


account. If an account is enrolled in AutoPay, there will be a blue icon stating it is enrolled.

Click Un-Enroll in AutoPay.



A confirmation pop up will display. Click **Stop AutoPay**.

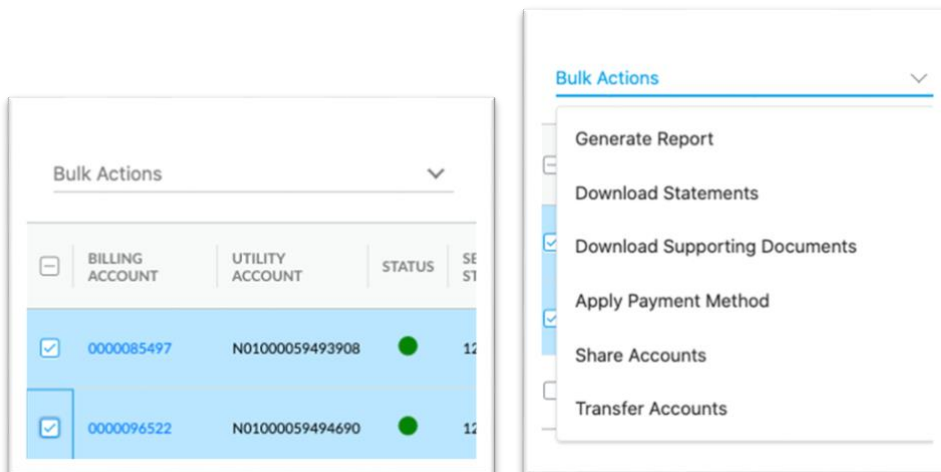


The toggle is now off and the AutoPay is off.



Bulk Actions

On the account list view, to the left of your accounts you will see a checkbox. Click on one or more checkboxes and a dropdown named **Actions** will appear.



You can select from multiple options:

Bulk Add Payment Method – Add a Payment Method for Multiple Accounts

On the account list view, to the left of your accounts you will see a checkbox. Click on one or more checkboxes and a dropdown named **Actions** will appear. Click on **Apply Payment Method**.

Bulk Actions ▾

- Add Payment Method ←
- Download Statements
- Download Supporting Documents
- Generate Report
- Share Accounts
- Transfer Accounts

SERVICE START	SERVICE ADDRESS	UTILITY	OWNER	STATEMENT BALANCE	DUE BY			
12/01/2019	116 CHURCH ST GRANVILLE, NY 12832	NYSEG	TE	\$3,250.02	07/17/2020		PAY	
12/01/2015	9217 MAIN ST CLARENCE, NY 14031	NYSEG	PA	\$3,333.69	07/17/2020		PAY	
05/01/2015	300 HIGH POINT DRIV HARTSDALE, NY 1053	CONED	TE	\$3,047.39	06/04/2020		PAY	

1 to 3 of 3 | Page 1 of 1

This will take you to the **Apply Payment Method** screen. On the left you will see the selected accounts you will be applying the change to. Please note that if you do not have permissions to apply payment methods to certain accounts, it will not display on the left.

Next, fill out all of the payment information. If you would like to set this payment method as the default payment method for the selected accounts, select the checkbox at the bottom.

Also, if you would like to turn on AutoPay for those selected accounts, select the second box **Turn on AutoPay for all accounts**.

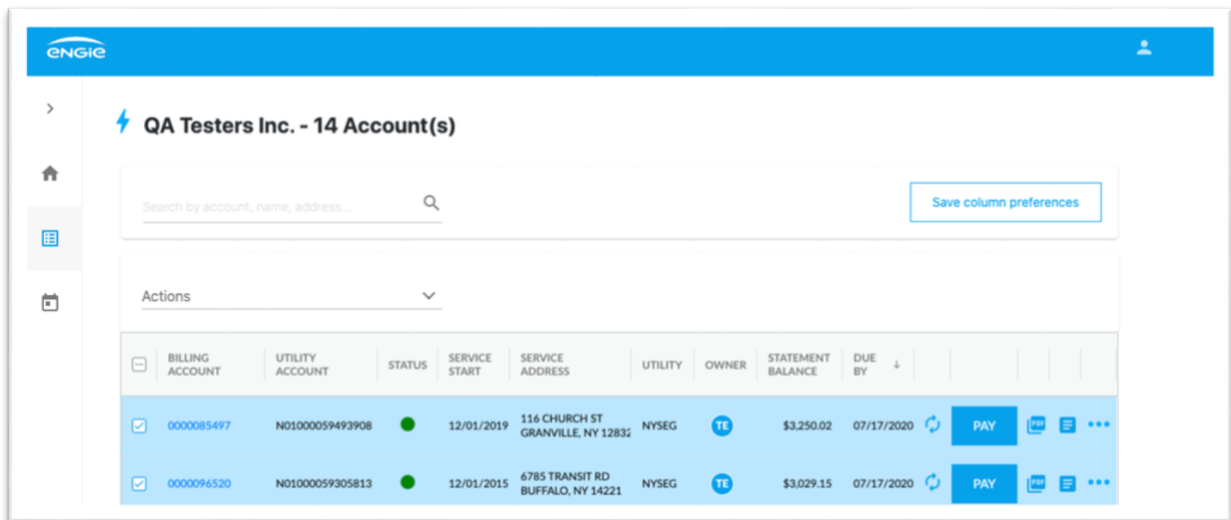
Apply Payment Method

Add a single payment method to multiple accounts

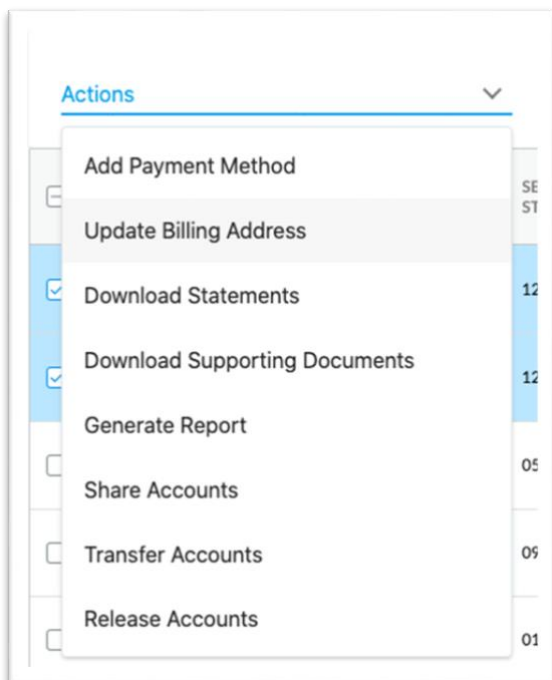
Selected Accounts	Routing Number	Confirm Routing Number
0000085497	<input type="text"/>	<input type="text"/>
0000096522	Account Number	Confirm Account Number
	<input type="text"/>	<input type="text"/>
Account Type	<input type="text"/>	
Name (First and Last or Company Name)		
<input type="text"/>		
<input type="checkbox"/> Set as default payment method <input type="checkbox"/> Turn on AutoPay for all accounts		
<input type="button" value="Cancel"/> <input type="button" value="Save"/>		

Bulk Update Billing Address – Update Billing Address for Multiple Accounts

On the account list view, to the left of your accounts you will see a checkbox. Click on one or more checkboxes of the accounts you would like to update.



A dropdown named **Actions** will appear. Click **Update Billing Address**.



This will take you to the **Update Billing Address** page. Enter the information you would like updated, and press save. Once you go back to your account list view, the changes will be updated.

Update Billing Address

Apply a single billing address to multiple accounts

Selected Accounts	Address Line 1		
0000085497	<input type="text"/>		
	Address Line 2		
	<input type="text"/>		
	City	State	▼
	<input type="text"/>	<input type="text"/>	
	Postal Code		
	<input type="text"/>		
	Billing Email Address		
	<input type="text"/>		

Bulk Generate Report – Generate a Report for Multiple Accounts

On the account list view, to the left of your accounts you will see a checkbox. Click on one or more checkboxes and a dropdown named **Actions** will appear. Click **Generate Report**.

Bulk Actions ▼

- Generate Report
- Download Statements
- Download Supporting Documents

<input checked="" type="checkbox"/>	0000096522	N01000059494690	●
<input type="checkbox"/>	0000098672	555857168000000	●

Generate Report

Create a custom report by selecting a date range and selecting specific billing/metering information.

Select Billed Dates

Choose from date Choose to date

The **Generate Report** page displays a date range for the report. The page will default to the *To* billed date and the *From* billed date.

Select Report Data Fields

Billing Information	Meter Information
<input type="checkbox"/> <i>Select All</i>	<input type="checkbox"/> <i>Select All</i>
<input type="checkbox"/> Statement Id	<input type="checkbox"/> Statement Date
<input type="checkbox"/> Statement Date	<input type="checkbox"/> Contract Name
<input type="checkbox"/> Contract Name	<input type="checkbox"/> Customer Name
<input type="checkbox"/> Customer Name	<input type="checkbox"/> Supplier Account Name
<input type="checkbox"/> Supplier Account Name	<input type="checkbox"/> Billing Account Number
<input type="checkbox"/> Billing Account Number	<input type="checkbox"/> Utility Account Number
<input type="checkbox"/> Utility Account Number	<input type="checkbox"/> Client Id
<input type="checkbox"/> Billing Address	<input type="checkbox"/> Meter Number
<input type="checkbox"/> Service Address	<input type="checkbox"/> Meter Multiplier
<input type="checkbox"/> Transaction Type	<input type="checkbox"/> Beginning Meter Read
<input type="checkbox"/> From Date	<input type="checkbox"/> Start Date
<input type="checkbox"/> To Date	<input type="checkbox"/> End Date
<input type="checkbox"/> kWh Usage	<input type="checkbox"/> Quantity
<input type="checkbox"/> Previous Balance	<input type="checkbox"/> Measurement Unit

The page will display fields under two columns/sections: **Billing** and **Meter** information.

Select the checkboxes next to the items you wish to have in the report.

Save Preferences


At the bottom of the page there is a toggle that you can turn on to save your preferences if you'd like to run the same report the next time you come into this page for the account.

Click **Generate Report** and an Excel download will appear at the bottom of your browser.



The excel file will have 2 tabs, one for **Billing Info** and one for **Meter Info**.

Billing Information

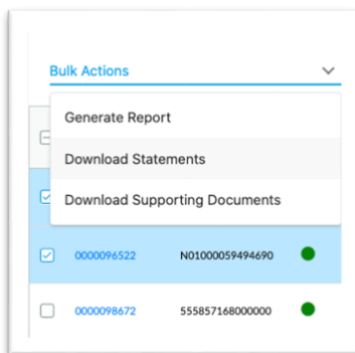


Customer Name	Supplier Account Number	Utility Account Number
VALGREEN CO.	1837773	N01000059493908
VALGREEN CO.	1837773	N01000059493908
VALGREEN CO.	1837773	N01000059493908
VALGREEN CO.	1837773	N01000059493908
VALGREEN CO.	1837773	N01000059493908
VALGREEN CO.	1837773	N01000059493908

Billing Meter

Bulk Download Statements – Download Statements (bills) for Multiple Accounts

On the account list view, to the left of your accounts you will see a checkbox. Click on one or more checkboxes and a dropdown named **Actions** will appear. Click **Download Statements**. At the bottom of the browser the PDF's will appear.



Bulk Download Supporting Documents – Download Supporting Documents for Multiple Accounts

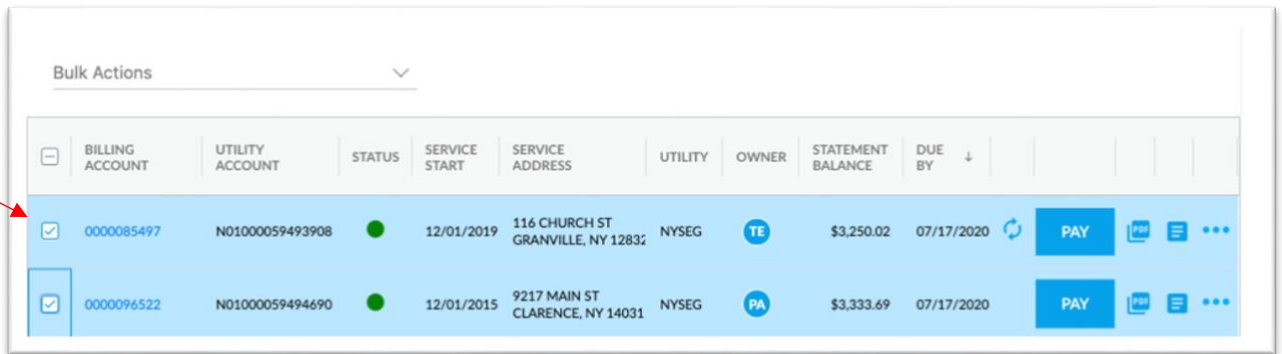
On the account list view, to the left of your accounts you will see a checkbox. Click on one or more checkboxes and a dropdown named **Actions** will appear. Click **Download Supporting Documents**. At the bottom of the browser the excel files will appear.

Bulk Actions ▼

- Generate Report
- Download Statements
- Download Supporting Documents

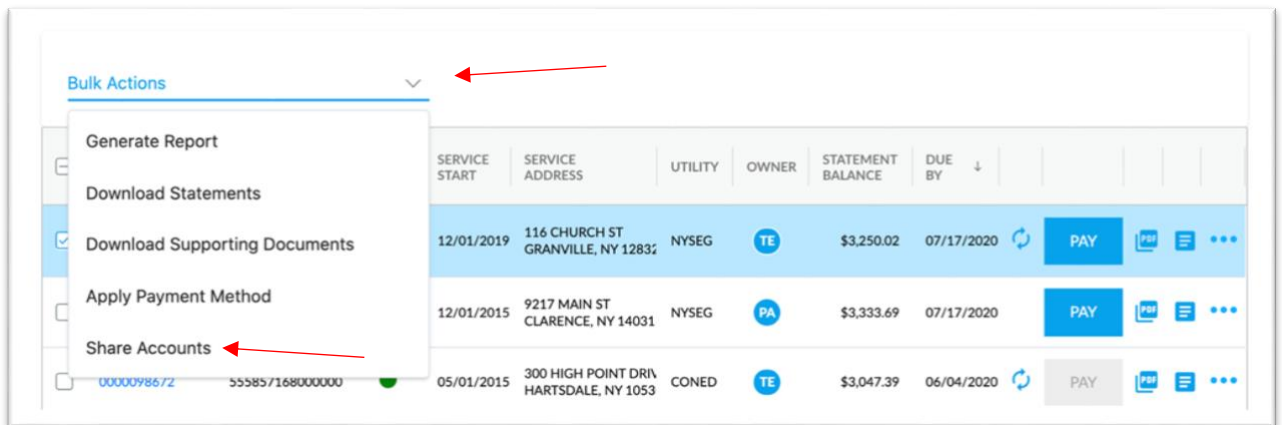
<input checked="" type="checkbox"/>	0000096522	N01000059494690	●
<input type="checkbox"/>	0000098672	55857168000000	●

Bulk Share Accounts – Share Multiple Accounts at Once



BILLING ACCOUNT	UTILITY ACCOUNT	STATUS	SERVICE START	SERVICE ADDRESS	UTILITY	OWNER	STATEMENT BALANCE	DUE BY		
<input checked="" type="checkbox"/>	0000085497	N01000059493908	●	12/01/2019	116 CHURCH ST GRANVILLE, NY 12832	NYSEG	TE	\$3,250.02	07/17/2020	
<input checked="" type="checkbox"/>	0000096522	N01000059494690	●	12/01/2015	9217 MAIN ST CLARENCE, NY 14031	NYSEG	PA	\$3,333.69	07/17/2020	

On the account list view, to the left of your accounts you will see a checkbox. Click on one or more checkboxes and a dropdown named **Actions** will appear. Click on **Share Accounts**.



BILLING ACCOUNT	UTILITY ACCOUNT	STATUS	SERVICE START	SERVICE ADDRESS	UTILITY	OWNER	STATEMENT BALANCE	DUE BY		
<input checked="" type="checkbox"/>	0000085497	N01000059493908	●	12/01/2019	116 CHURCH ST GRANVILLE, NY 12832	NYSEG	TE	\$3,250.02	07/17/2020	
<input checked="" type="checkbox"/>	0000096522	N01000059494690	●	12/01/2015	9217 MAIN ST CLARENCE, NY 14031	NYSEG	PA	\$3,333.69	07/17/2020	
<input type="checkbox"/>	0000098672	555857168000000	●	05/01/2015	300 HIGH POINT DRIN HARTSDALE, NY 1053	CONED	TE	\$3,047.39	06/04/2020	

Share Accounts

Enter the email addresses of the people you would like to share the accounts with. This will allow the user to access the same accounts with the selected role and access type.

Selected Accounts: 0000096522

Email Addresses (separated by comma): test@engie.com, test1@engie.com

Role:

Access Type:

If you need additional assistance visit our [Help Center](#) for additional information on how to get in touch with us.

This will take you to the **Share Accounts** screen. On the left you will see the selected accounts you will be applying the change to. Please note that if you do not have permissions to share certain accounts, it will not display on the left.

Fill out the email addresses in which you would like to share the selected accounts with. Make sure you separate the email addresses with a comma.

Next, select the Role for the accounts: either Customer or Partner.

Role
Customer

Access Type

Sharee

Power Sharee

Read Only

Select the access type you want them to receive.

- Sharee

With Sharee access, a user can view all information pertinent to the account, edit their user profile, pay bills, edit payment information, enroll in autopay & paperless billing, view account history, and generate reports.

Role
Partner

Access Type

Sharee

Power Sharee

Read Only

- Power Sharee

*With Power Sharee access, a user can perform all actions a **Sharee** can, but also can Share, Transfer, and Release Accounts.*

- Read Only

With Read Only access, a user can view all information pertinent to the account, however, they are only able to edit their user profile.

After selecting the Role and Access Type, Click **Share**. A message is displayed that the account(s) have been shared.

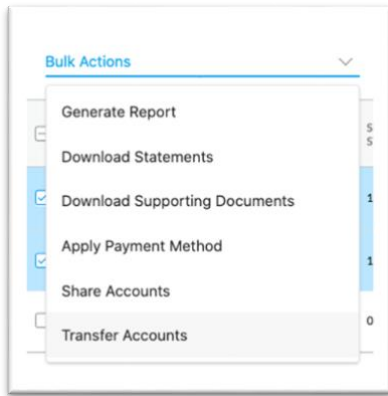
Bulk Transfer Accounts – Transfer Multiple Accounts at Once

This feature is if you would like to transfer the account from your view to another user.

On the account list view, to the left of your accounts you will see a checkbox. Click on one or more checkboxes and a dropdown named **Actions** will appear. Click on **Transfer Accounts**.

Bulk Actions

	BILLING ACCOUNT	UTILITY ACCOUNT	STATUS	SERVICE START	SERVICE ADDRESS	UTILITY	OWNER	STATEMENT BALANCE	DUE BY			
<input checked="" type="checkbox"/>	0000085497	N01000059493908	●	12/01/2019	116 CHURCH ST GRANVILLE, NY 12832	NYSEG	TE	\$3,250.02	07/17/2020	🔄	PAY	📄 ⋮
<input checked="" type="checkbox"/>	0000096522	N01000059494690	●	12/01/2015	9217 MAIN ST CLARENCE, NY 14031	NYSEG	PA	\$3,333.69	07/17/2020		PAY	📄 ⋮



In the dropdown menu, select **Transfer Accounts**. This will take you to the **Transfer Accounts** page.

Transfer Accounts

Enter the email addresses of the people you would like to transfer the accounts to. This will allow the users to access the same accounts with the selected role and access type.

Selected Accounts

0000096522

Email Addresses (separated by comma)

test@engie.com, test1@engie.com

Role

Access Type

Cancel
Transfer

On the left you will see a list of the **selected accounts** you will be applying the change to. Please note that if you do not have permissions to transfer certain accounts, it will not display on the left.

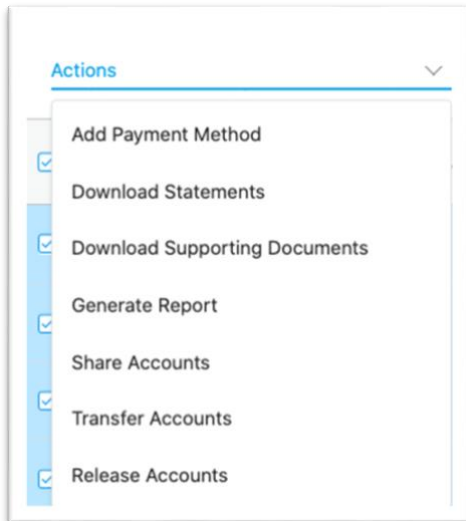
Fill out the email addresses in which you would like to transfer the selected accounts to. Make sure you separate the email addresses with a comma.

Next, select the role and access type you would like to transfer the account permissions as.

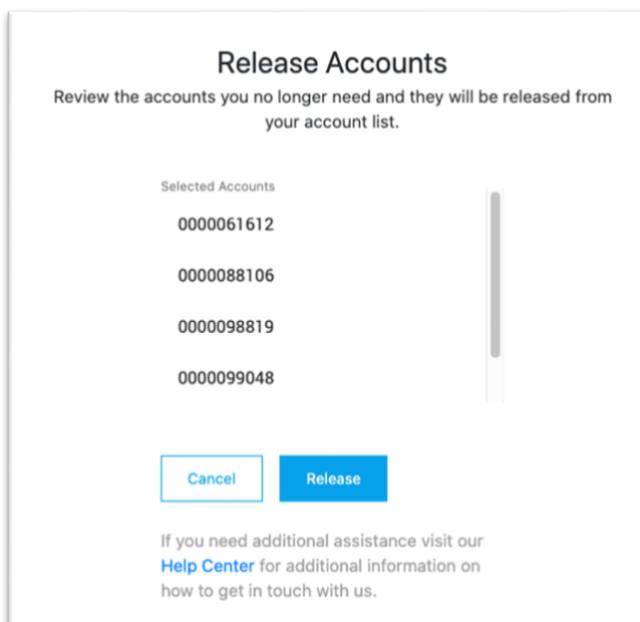
Bulk Release Accounts – Remove Multiple Accounts at Once

On the account list view, to the left of your accounts you will see a checkbox. Click on one or more checkboxes and a dropdown named **Actions** will appear. Click on **Release Accounts**.

Bulk Actions										
<input type="checkbox"/>	BILLING ACCOUNT	UTILITY ACCOUNT	STATUS	SERVICE START	SERVICE ADDRESS	UTILITY	OWNER	STATEMENT BALANCE	DUE BY	
<input checked="" type="checkbox"/>	0000085497	N01000059493908	●	12/01/2019	116 CHURCH ST GRANVILLE, NY 12832	NYSEG	TE	\$3,250.02	07/17/2020	PAY PM ☰ ⋮
<input checked="" type="checkbox"/>	0000096522	N01000059494690	●	12/01/2015	9217 MAIN ST CLARENCE, NY 14031	NYSEG	PA	\$3,333.69	07/17/2020	PAY PM ☰ ⋮



This will take you to the **Release Accounts** screen where the accounts you selected will display. Please note: if you do not have permissions to release an account, it will not display here. Once you click **Release**, those accounts will be removed from your user profile. Also, If you are the account owner and the account is an active account with a balance, you will not be able to release the account.



View Your Account(s) - Scenario 2: Account Detail View

This view is when a user is associated with one account or when they click into an account on their account list view.

ENGIE - 0000096522

Total Amount Due

Your most recent payment of \$2,540.13 on September 3, 2020 is pending.

Remaining Balance **\$2,540.13**

Current Charges **\$793.56**

Statement Balance **\$3,333.69**

Total Amount Due **-\$15,863.69**

[View Bill](#)

[Make a Payment](#)

Account Info

Billing Account: 0000096522

Utility Account: N01000059494690

Utility: NYSEG

Account Owner(s): This account is receiving paper bills.

Contact

Service Address: 9217 MAIN ST, CLARENCE, NY 14031

Billing Address: ENGIE INSIGHT MS 3047, PO BOX 2440, SPOKANE, WA 99210

Contact: KARA COX, Billing Email Address

Account Settings

Service Start Date: Dec 1, 2015

Account Status: Account Accepted

Billing Type: Separate Bills

Tax Status: Tax Exempt

Costs & Usage
April 8, 2020 - May 12, 2020

		BILL CYCLE	YEAR
> Retail Adder Charge	\$24.31		
> Energy Imbalance Charge	\$402.81		
Subtotal Supplier Charges	\$427.12		
> Unforced Capacity Charge	\$90.89		
> Ancillary Services Charge	\$211.70		
Subtotal Settlement Charges	\$302.59		
> Sales Tax - State	\$29.19		
> Sales Tax - County	\$34.66		
Subtotal Taxes	\$63.85		
Remaining Balance	\$2,540.13		
Current Charges	\$793.56		
Statement Balance	\$3,333.69		
*Total Amount Due	-\$15,863.69		

*Total Amount Due of the billing account

Billing Days: **35**

Average Daily Charges: **\$22.67**

Clicking on the Account from the list view will take you to the Account Detail Page.

QA Testers Inc. - 16 Account(s)

Search by account, name, address...

	BILLING ACCOUNT	UTILITY ACCOUNT	STATUS	SERVICE START
<input type="checkbox"/>	0000087182	5977533159	●	01/01/2016

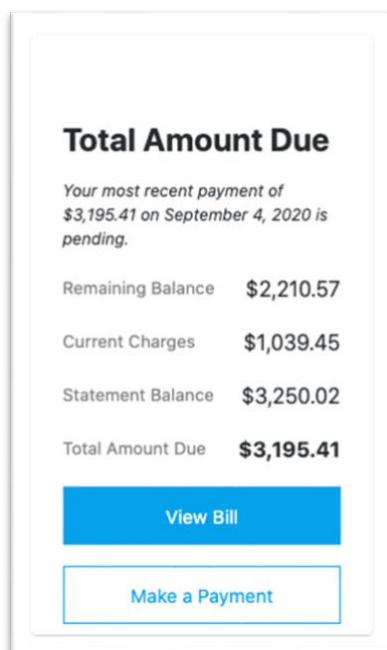
Account Information

When you navigate to the Account Detail page, you will see the following tiles in the first section:

- Total Amount Due
- Account Info
- Contact
- Account Settings

Total Amount Due

Total Amount Due will have the following components:



- Message displays if a payment is pending, scheduled, rejected, or processed
- Remaining Balance
 - This is the Previous Statement Balance less any payments made since the previous statement. If no payments have been made since the previous statement, Balance Remaining is equal to the Previous Balance.
- Current Charges
- Statement Balance
 - Total Amount Due of the Statement period
- Total Amount Due
 - This is the real-time Account Balance so Total Amount Due will always reflect what is currently due if any payments (or partial payments) over the phone, portal or IVR have been made since the statement period posted.

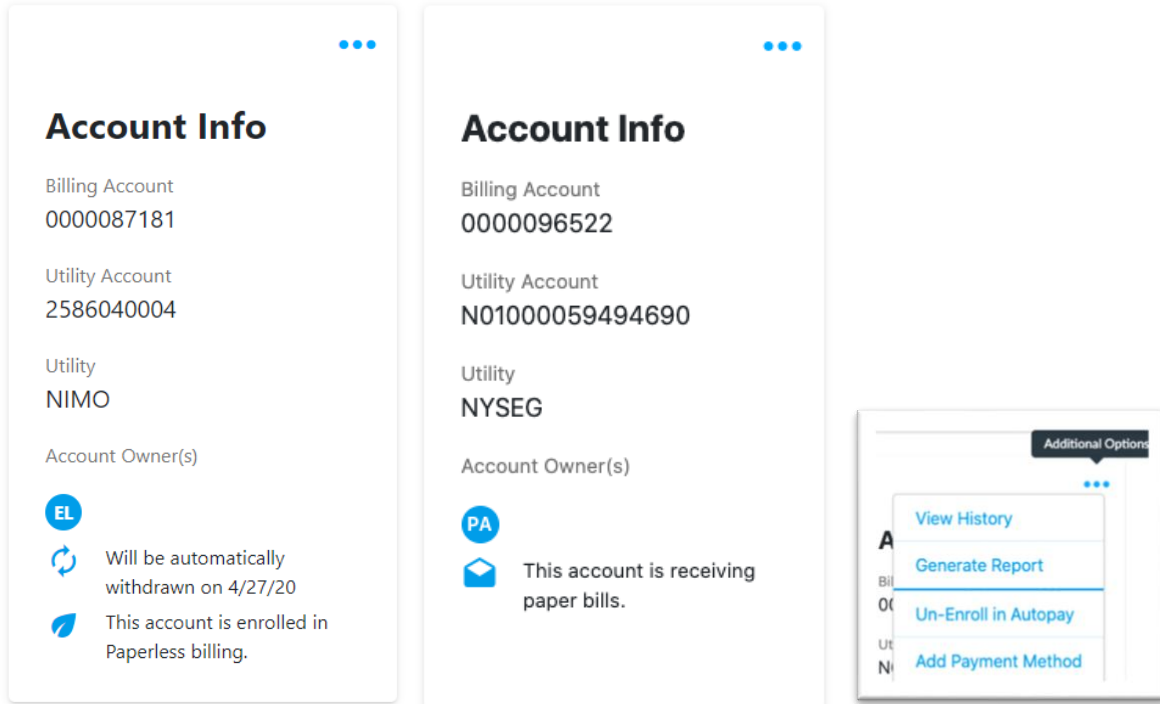
View Bill/Statement

By clicking on the **View Bill** button it will open and display in a new tab the PDF of the bill/statement for the current period.

- Make a Payment (See section below for more detail how to make a payment)
 - Please note: The button will be disabled if there is no balance on the account.

Account Info Tile

Account Info tile will display the following information:



- Ellipses menu (menu shown expanded on right image)
 - View History- History of the account
 - Generate Report
 - Enroll/Un-Enroll in AutoPay
 - Add Payment Method
- Billing Account Number
- Utility Account Number
- Utility
- Account Owner(s)
 - First initial of the owner’s first and last name display in icon
- Auto pay
 - If account is enrolled in auto pay, an icon will display
- Paperless billing or Paper Bills (variation shown in #1 & #2 images)
 - If an account in enrolled in paperless billing, an icon will display

Contact Tile

Contact tile has the following information:

Contact

Service Address
29 GINSBERGS RD LITE
HUDSON, NY 12534

Billing Address
9601 KATY FREEWAY
SUITE 1000
HOUSTON, NY 77024

Contact
Contact Type: Billing

Billing Email Address
thisismyemail@mycompany.biz

- Service Address
- Billing Address
- Contact
 - Contact Type which will always display “Billing”
- Billing Email Address
 - Account owner’s email address

Account Settings Tile

Account Settings tile has the following information:

Account Settings

Service Start Date
Jan 1, 2016

Account Status
Account Accepted

Billing Type
Separate Bills

Tax Status
Not Tax Exempt

- Service Start Date
- Account Status

- Billing Type
- Tax Status

Costs & Usage

This section displays the cost and usage information for the selected billing account and utility account.

Bill Cycle Tab - Cost

Please note that each line item charges are for the selected utility account number.

Costs & Usage		BILL CYCLE	YEAR
April 14, 2020 - May 12, 2020			
✓ Retail Adder Charge <i>30320 KWH @ 0.000990 / KWH for 29 days</i>	\$30.02 \$30.02	Billing Days	
		29	
> Energy Imbalance Charge	\$528.27	Average Daily Charges	
		\$35.84	
Subtotal Supplier Charges	\$558.29		
> Unforced Capacity Charge	\$152.60		
> Ancillary Services Charge	\$260.56		
Subtotal Settlement Charges	\$413.16		
> Sales Tax - State	\$38.86		
> Sales Tax - County	\$29.14		
Subtotal Taxes	\$68.00		
Remaining Balance	\$2,210.57		
Current Charges	\$1,039.45		
Statement Balance	\$3,250.02		
*Total Amount Due	\$3,195.41		
*Total Amount Due of the billing account			

The following are possible line item charge will be part of a line item charge category. I.E. Energy Charge and Fixed Price Energy Charge are going to display under the Supplier Charges subcategory. The system will display subtotal for each category.

At the end of the line item charges, the system will display:

- Subtotal Taxes
- Remaining Balance

- Current Charges
- Statement Balance
- Total Amount Due

For summary bill accounts the Total Amount Due is for the billing account not just the UAN that user has selected. A foot note is there for your information.

Bill Cycle Tab - Usage

Expand the carrot to view details of the line item charge

Costs & Usage
April 14, 2020 - May 12, 2020

▼ Retail Adder Charge \$30.02

→ 30320 KWH @ 0.000990 / KWH for 29 days \$30.02

Year Tab - Usage

This tab within the section shows the usage for the year on the utility account selected

- Click on Previous Year or Next Year hyperlinks to view account usage data for the previous or next year.
- Click on the Export to Excel to export data to Microsoft Excel

Costs & Usage
March 12, 2020 - April 10, 2020

BILL CYCLE YEAR

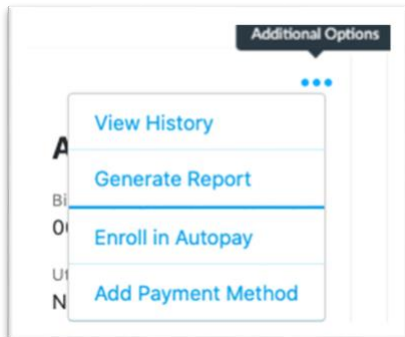
< Previous Year
January 1, 2020 - December 31, 2020
Next Year >

BILL PERIOD FROM	BILL PERIOD TO	METER NUMBER	TOTAL kWh	TOTAL kW
03/12/2020	04/10/2020		17360	0
02/11/2020	03/12/2020		20480	0
1 to 2 of 2 << < Page 1 of 1 > >>				

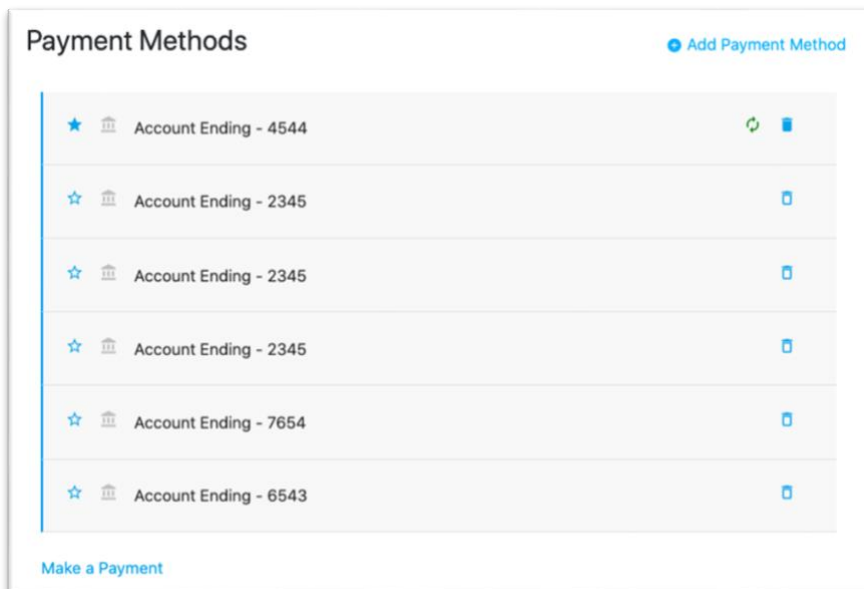
Export to excel

Add/Delete a Payment Method: Scenario 1

When you are on your account detail page, locate the **Account Info** tile and click on the icon with three blue horizontal dots. Click **Add Payment Method**.



This page will display all your current payment methods for this account.



Add Payment Method

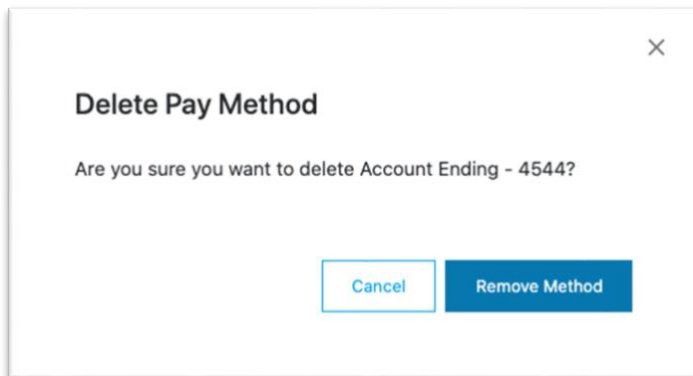
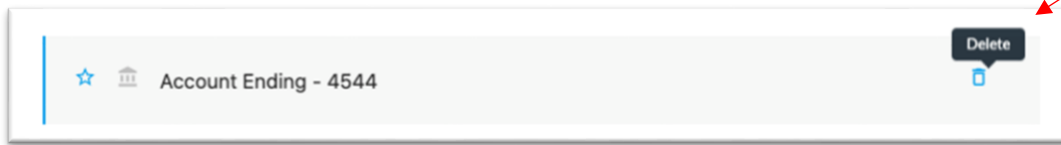
At the top right of the page there will be a **Add Payment Method** link.

Select this to be taken to a pop up that will have you enter in payment information. Please note at this time payments can only be made from a checking or savings account.

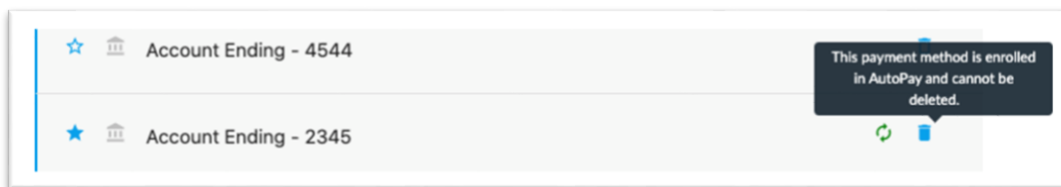
The required fields are shown to the left including: Routing #, Checking/Savings dropdown, Account Number, Re-enter account number, Company Name, and Postal Code.

Click **Save**, and you will see a confirmation message that your payment method has been added.

Delete Payment Method



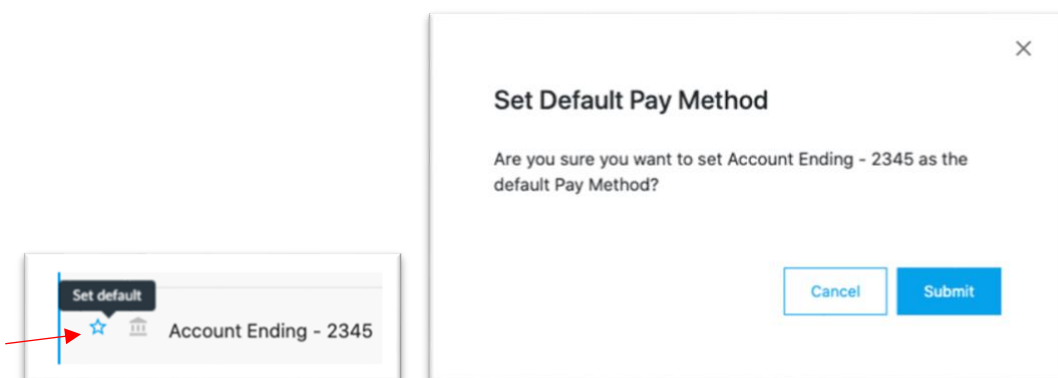
If you no longer need a payment method, you can remove it from the list. Click on the trash can icon to the right of the payment method to delete it. A pop up will appear asking you to confirm you want to delete the payment method. Click **Remove Method** to continue. The payment method will then be removed from the list.



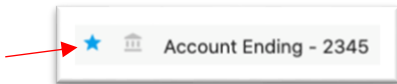
Please note that a payment **cannot** be deleted if it is the payment method that is enrolled in AutoPay. AutoPay is always tied to the default payment method. If you do want to delete a payment method that is associated with AutoPay, change the default payment method and it will tie AutoPay with that payment method.

Default Payment Method

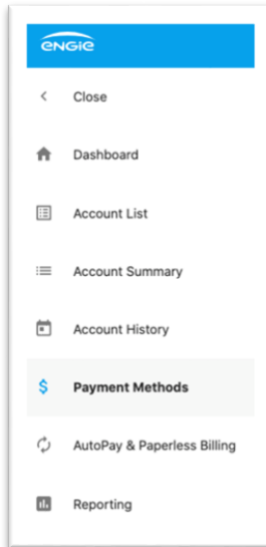
To change the default payment method, click on the star next to the account you would like to change it to.



A pop up will appear, asking you to confirm you want to set it as the default pay method. Select **Submit** to continue. A blue star icon will now appear next to the new default pay method.

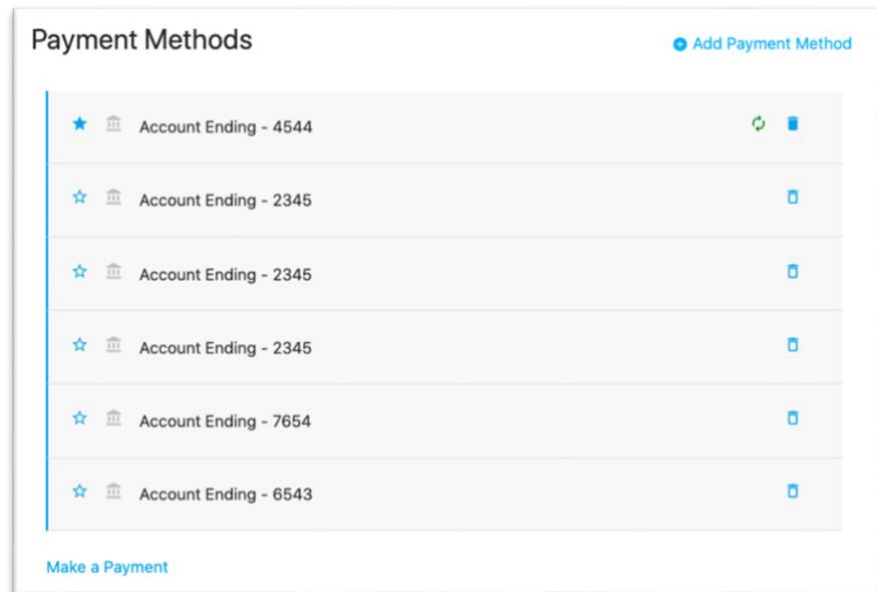


Add/Delete a Payment Method: Scenario 2



When you are on your account detail page, locate the menu on the left side of the screen. Click on **Payment Methods**.

This page will display all your current payment methods for this account.



Add Payment Method

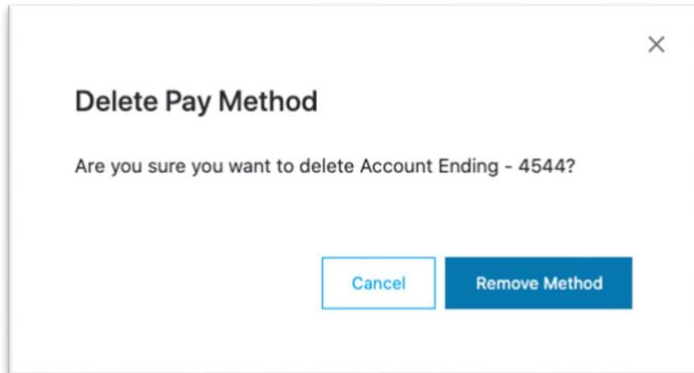
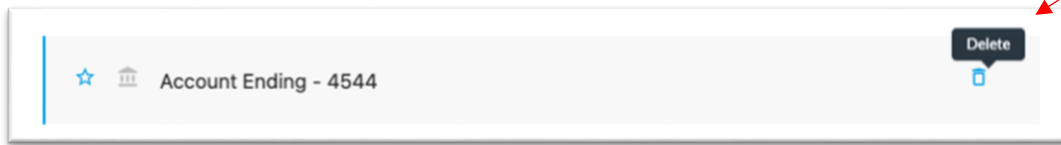
At the top right of the page there will be a **Add Payment Method** link.

Select this to be taken to a pop up that will have you enter in payment information. Please note at this time payments can only be made from a checking or savings account.

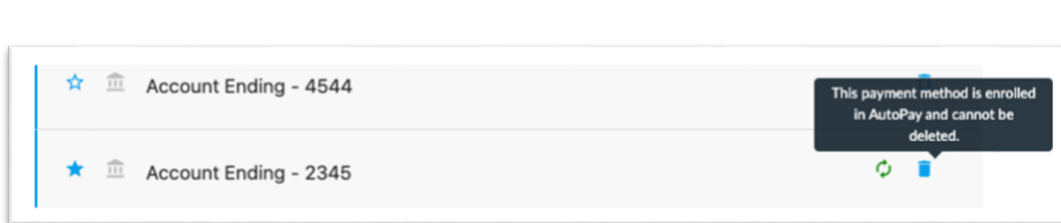
The required fields are shown to the left including: Routing #, Checking/Savings dropdown, Account Number, Re-enter account number, Company Name, and Postal Code.

Click **Save**, and you will see a confirmation message that your payment method has been added.

Delete Payment Method



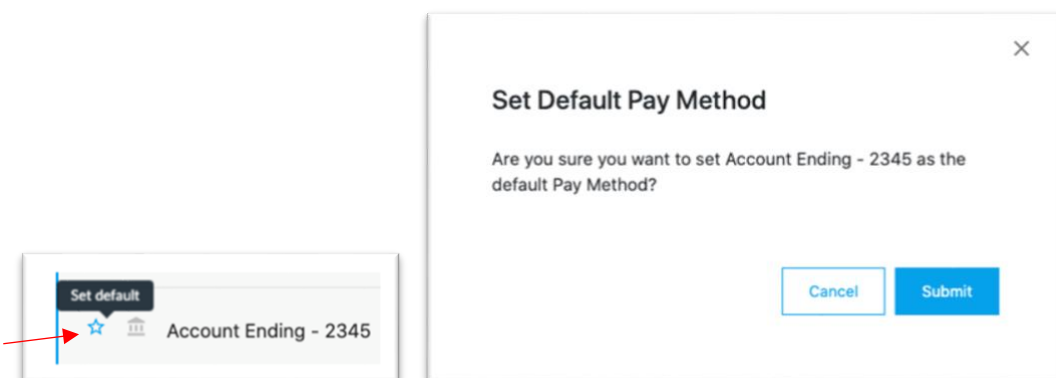
If you no longer need a payment method, you can remove it from the list. Click on the trash can icon to the right of the payment method to delete it. A pop up will appear asking you to confirm you want to delete the payment method. Click **Remove Method** to continue. The payment method will then be removed from the list.



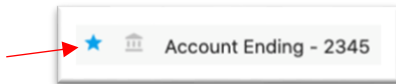
Please note that a payment **cannot** be deleted if it is the payment method that is enrolled in AutoPay. AutoPay is always tied to the default payment method. If you do want to delete a payment method that is associated with AutoPay, change the default payment method and it will tie AutoPay with that payment method.

Default Payment Method

To change the default payment method, click on the star next to the account you would like to change it to.

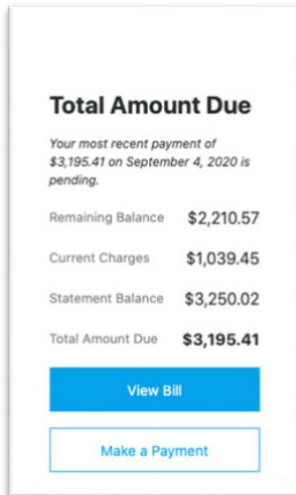


A pop up will appear, asking you to confirm you want to set it as the default pay method. Select **Submit** to continue. A blue star icon will now appear next to the new default pay method.



Make a Payment

On the account detail page in the left tile, click on the **Make a Payment** button.



The button will be disabled if there is no balance on the account. If the button is enabled you can click it to make a payment. It will direct you to the **Payment** screen.

Total Amount Due

\$3,195.41

AutoPay applied for Jul 17

[View Bill](#)

Please Note: This is the final step to submit your payment. Be sure to double check that all of your information is correct!

Payment Amount ▼

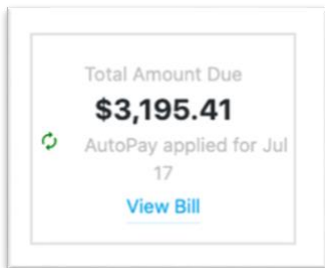
Payment Date

9/18/2020 📅

Payments can be scheduled up to and including your due date. Please select a date between today and your next due date.

Payment Method ▼

Submit Payment

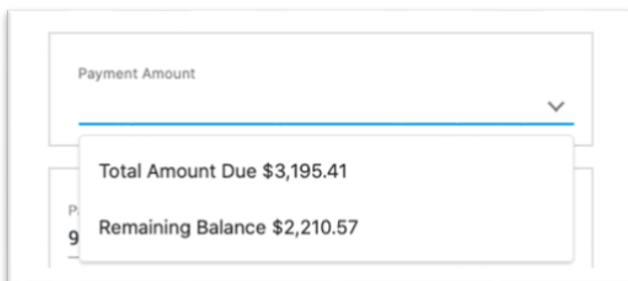


The top section will show your total amount due and if it is enrolled in AutoPay, a message will appear here to indicate that. You can still proceed even though you are enrolled in AutoPay if you want to make a one-time payment.

[View Bill](#)

You can also view your bill you are paying on here. This will open up a PDF of the statement.

Payment Amount



When clicking on the caret (down arrow), you will see the total amount due and the remaining balance.

Payment Date

Payment Date
9/18/2020

SEP 2020

S M T W T F S

SEP

1 2 3 4 5
6 7 8 9 10 11 12
13 14 15 16 17 18 19
20 21 22 23 24 25 26
27 28 29 30

your due date. Please

The payment date will automatically default to the current day. Payments can be scheduled up to and including your due date.

Payment Method

Payment Method

Account Ending - 4544
Account Ending - 2345
Account Ending - 2345
Account Ending - 2345
Account Ending - 7654
Account Ending - 6543

When clicking on the caret (down arrow), you will see all of your payment methods that have been added. Click on the payment method you would like to use, then click the **submit payment** button. You will receive a confirmation message saying that your payment has been made.

Update Billing Address

From the account detail view, click on the three blue horizontal dots to display more options. Select **Update Billing Address**.

ENERGY EDGE CONSULTING LLC - 000085497

Account Activity

Previous Balance	\$2,210.57
Payments Received	\$0.00
Balance Remaining	\$2,210.57
Current Charges	\$1,039.45
Statement Balance	\$3,250.02

Your most recent payment of \$2,210.57 on October 21, 2020 was rejected.

Account Balance **\$3,195.41**

[View Statement](#)

[Make a Payment](#)

Update Billing Address

Contact

Service Address
116 CHURCH ST
GRANVILLE, NY 12832

Billing Address
101 Main St
Ste 2000
Houston, TX 77002

Contact
Contact Type: Billing

KACIE MOYLAN
Billing Email Address
test@test.com

Account Settings

Service Start Date
Dec 1, 2019

Account Status
Account Accepted

Billing Type
Separate Bills

Tax Status
Tax Exempt

This will take you to a page where you can update the information and press **save**.

Update Billing Address

Apply a single billing address to multiple accounts

Selected Accounts
000085497

Address Line 1

Address Line 2

City _____ State _____

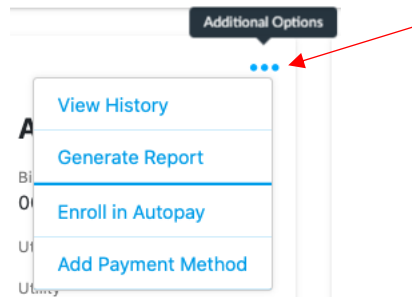
Postal Code

Billing Email Address

[Cancel](#) [Save](#)

View Account History

From the account detail view, click on the three blue horizontal dots to display more options.



Click on the **View History** option.

The account will default to the account you are on. You can then select the date range and press **Search**. This will then display all of your previous activity specific to the account you selected.

A screenshot of the account history search and results page. At the top, there is a search form with fields for 'Account' (0000085497), 'From Date' (6/20/2020), and 'To Date' (9/18/2020). A blue 'Search' button is to the right of the date fields. Below the search form is a table with columns: BILLING ACCOUNT, TYPE, STATUS, PAYMENT AMOUNT, TRANSACTION DATE, STATEMENT PERIOD, USAGE, CURRENT CHARGES, and STATEMENT BALANCE. The table contains 10 rows of data. At the bottom of the table, there is a pagination control showing '1 to 10 of 12' and 'Page 1 of 2'. Below the table, there is a 'Rows per page' dropdown set to '10' and an 'Export to Excel' button.

<input type="checkbox"/>	BILLING ACCOUNT	TYPE	STATUS	PAYMENT AMOUNT	TRANSACTION DATE	STATEMENT PERIOD	USAGE	CURRENT CHARGES	STATEMENT BALANCE
<input type="checkbox"/>	0000085497	eCheck	Pending	(\$3,195.41)	09/04/2020				
<input type="checkbox"/>	0000085497	eCheck	Pending	(\$3,400.23)	09/03/2020				
<input type="checkbox"/>	0000085497	eCheck	Pending	(\$3,195.41)	09/03/2020				
<input type="checkbox"/>	0000085497	eCheck	Pending	(\$3,195.41)	09/02/2020				
<input type="checkbox"/>	0000085497	eCheck	Cancelled	(\$2,210.57)	07/15/2020				
<input type="checkbox"/>	0000085497	eCheck	Cancelled	(\$2,210.57)	07/13/2020				
<input type="checkbox"/>	0000085497	eCheck	Cancelled	(\$2,210.57)	07/13/2020				
<input type="checkbox"/>	0000085497	eCheck	Cancelled	(\$2,210.57)	07/10/2020				
<input type="checkbox"/>	0000085497	eCheck	Cancelled	(\$2,210.57)	07/10/2020				
<input type="checkbox"/>	0000085497	eCheck	Cancelled	(\$2,210.57)	07/10/2020				

You can change the **rows per page** at the bottom as well as **download** the table in excel. (The download will only use the data from your selected date range.)

You can filter by billing account number, type, status, and usage. Once you start typing it will automatically narrow down the list. You don't have to press the search icon after.

Account: 0000085497 From Date: 6/20/2020 To Date: 9/18/2020 Search: can


BILLING ACCOUNT	TYPE	STATUS	PAYMENT AMOUNT	TRANSACTION DATE	STATEMENT PERIOD	USAGE	CURRENT CHARGES	STATEMENT BALANCE
0000085497	eCheck	Cancelled	(\$2,210.57)	07/15/2020				
0000085497	eCheck	Cancelled	(\$2,210.57)	07/13/2020				
0000085497	eCheck	Cancelled	(\$2,210.57)	07/13/2020				
0000085497	eCheck	Cancelled	(\$2,210.57)	07/10/2020				
0000085497	eCheck	Cancelled	(\$2,210.57)	07/10/2020				
0000085497	eCheck	Cancelled	(\$2,210.57)	07/10/2020				
0000085497	eCheck	Cancelled	(\$2,210.57)	07/10/2020				
0000085497	eCheck	Cancelled	(\$2,210.57)	07/10/2020				
0000085497	eCheck	Cancelled	(\$2,210.57)	07/10/2020				

1 to 8 of 8 Page 1 of 1

Cancel a Pending Payment

Note- a payment can only be cancelled if the status is 'pending'

Locate the payment in the table. Click on the **blue 'x' icon** next so the **scheduled** payment

0000098672	eCheck	Scheduled 	05/27/2020				(\$3,047.39)	\$0.00
0000098672	eCheck	Pending	05/27/2020				(\$3,047.39)	\$0.00

A confirmation modal appears. Click **Cancel Payment** to continue.

✕

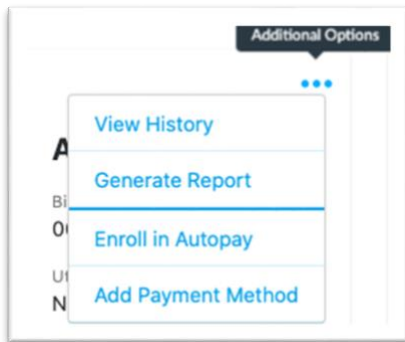
Cancel Scheduled Payment

Are you sure you want to cancel this payment?

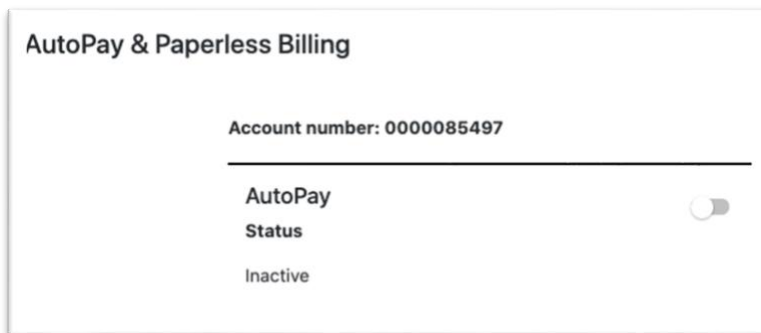
Don't Cancel
Cancel Payment

Enroll in AutoPay

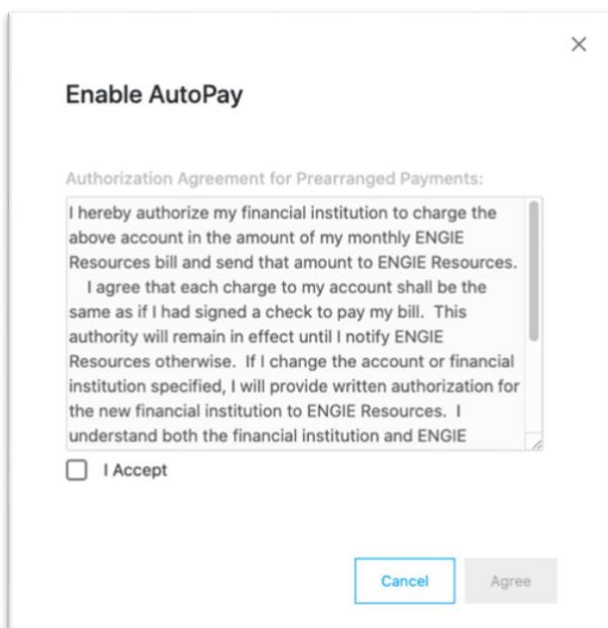
When you are on your account detail view, click on the three horizontal blue dots at the top of **Account Info** tile.



Click the option **Enroll in AutoPay**. This will take you to the **AutoPay & Paperless Billing** page for that specific account.



Click on the toggle to turn on. This will display a confirmation to authorize AutoPay for the account selected. Select the checkbox next to **I Accept**. Then the **Agree** button will be enabled to select.



The toggle is now on and active with the default payment method used.

AutoPay & Paperless Billing

Account number: 000085497

AutoPay ●

Status

Active

Payment method

Account Ending - 2345

[Change payment method](#)

Un-Enroll in AutoPay

When you are on your account detail view, click on the three horizontal blue dots at the top of the **Account Info** tile. Click Un-Enroll in AutoPay.

The image shows two parts of the user interface. On the left is the 'Account Info' tile, which contains the following text: 'Billing Account 0000096522', 'Utility Account N01000059494690', 'Utility NYSEG', and 'Account Owner(s)'. Below this is a 'PA' icon and a note: 'This account is receiving paper bills.' At the top right of the tile are three blue dots. On the right is a zoomed-in view of the menu that appears when these dots are clicked. The menu is titled 'Additional Options' and contains four items: 'View History', 'Generate Report', 'Un-Enroll in Autopay', and 'Add Payment Method'. The 'Un-Enroll in Autopay' option is highlighted with a blue border.

A confirmation pop up will display. Click **Stop AutoPay**.

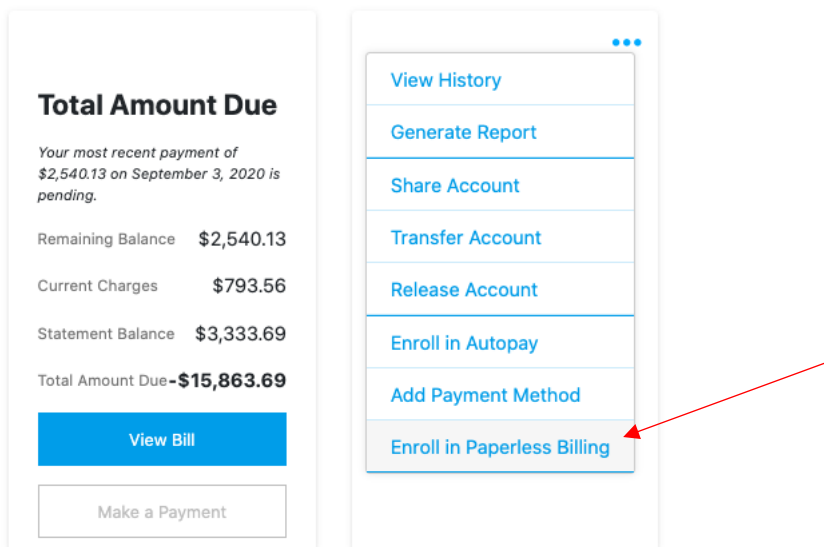
The image shows a confirmation dialog box with a close button (X) in the top right corner. It features a blue bell icon and the title 'Disable AutoPay'. The main text reads: 'You are changing payment settings for this account. Are you sure you would like to stop Auto-pay for this account?'. At the bottom, there are two buttons: 'Cancel' and 'Stop AutoPay'.

The toggle is now off and the AutoPay is off.

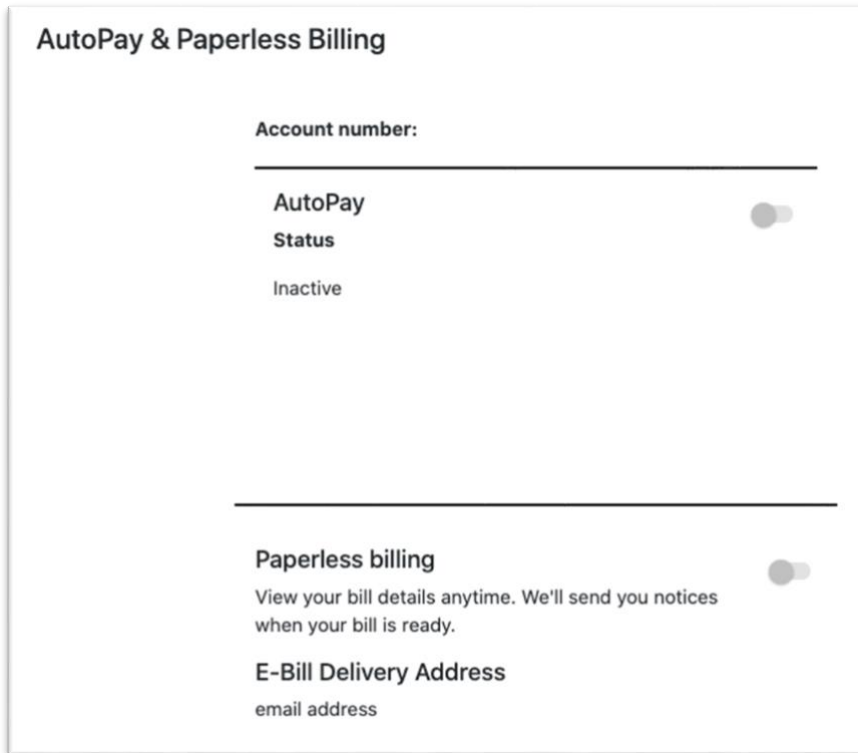


Enroll in Paperless Billing (Sign up to get emailed bill copies)

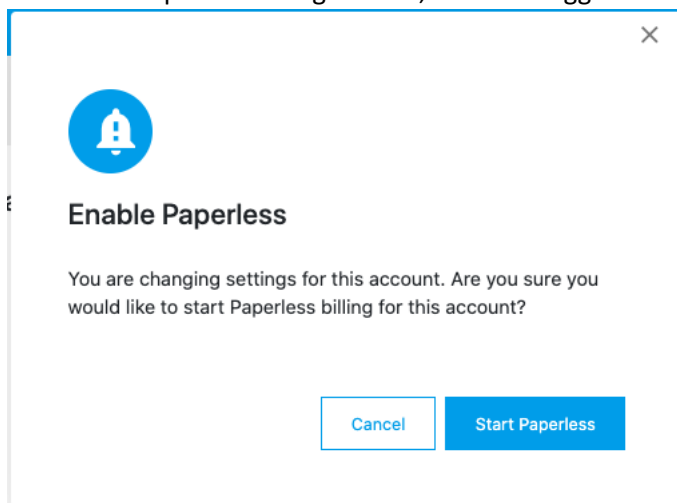
When you are on your account detail view, locate the **Account Info** tile and select the icon with the 3 blue horizontal dots.



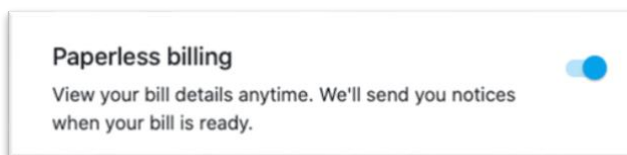
Click on **Enroll in Paperless Billing**. This will take you to the AutoPay & Paperless Billing page.



Under the Paperless Billing section, click the toggle to turn on and a pop up will appear.



Click **Start Paperless** to continue and now the toggle is on and you are enrolled.



[Un-Enroll in Paperless Billing](#)

When you are on your account detail view, locate the **Account Info** tile and select the icon with the 3 blue horizontal dots.

The image shows a user interface for account management. On the left, under the heading "Total Amount Due", the following information is displayed: Remaining Balance \$1,619.68, Current Charges -\$1,619.68, Statement Balance \$0.00, and Total Amount Due \$0.00. Below this is a blue "View Bill" button and a "Make a Payment" button. On the right, a settings menu is open, listing options: View History, Generate Report, Share Account, Transfer Account, Release Account, Enroll in Autopay, Add Payment Method, and Un-Enroll in Paperless Billing. A red arrow points to the "Un-Enroll in Paperless Billing" option.

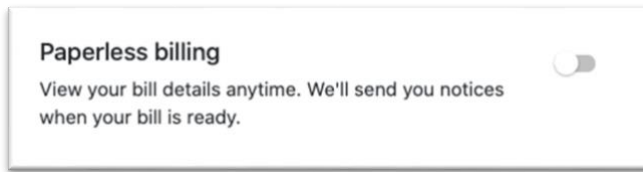
Click on **Un-Enroll in Paperless Billing**. This will take you to the AutoPay & Paperless Billing page.

The image shows the "AutoPay & Paperless Billing" settings page for account number 0000096520. The "AutoPay" section has a status of "Inactive" and a toggle switch that is currently turned off. The "Paperless billing" section has a toggle switch that is currently turned on. Below the toggle, it says "View your bill details anytime. We'll send you notices when your bill is ready."

Under the Paperless Billing section, click the toggle to turn off and a pop up will appear.

The image shows a confirmation dialog box titled "Disable Paperless". It features a blue bell icon and the text: "You are changing settings for this account. Are you sure you would like to stop Paperless billing for this account?". At the bottom, there are two buttons: "Cancel" and "Stop Paperless".

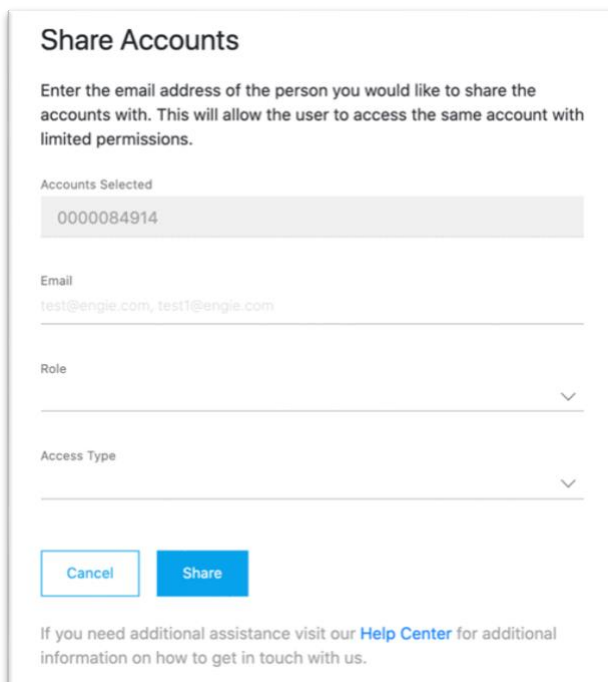
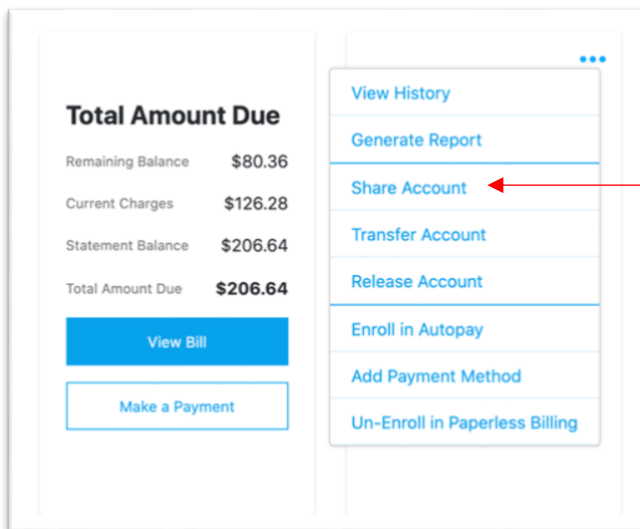
Click **Stop Paperless** to continue and now the toggle is off and you will start receiving paper bills with the next billing cycle.



Share Account(s)

Use this feature if you would like to share an account to another email/user and also have it on your account list view to access.

From the account detail view, click on the three blue horizontal dots on the right of the **Account Info** tile to display additional options. Select **Share Account**.



The **Share Accounts** screen will appear where you can enter one or more email address in which you want to share the specified account with.

Under the **Role** dropdown, select either *Customer* or *Partner*.



There are three different **Access Types** associated with both **Customer/Partner** Roles. Select the access type you would like the email to have permissions for.

The image shows two screenshots of a user selection interface. The top screenshot shows the 'Role' dropdown set to 'Customer' and the 'Access Type' dropdown with 'Sharee' selected. The bottom screenshot shows the 'Role' dropdown set to 'Partner' and the 'Access Type' dropdown with 'Sharee' selected.

- Sharee

With Sharee access, a user can view all information pertinent to the account, edit their user profile, pay bills, edit payment information, enroll in autopay & paperless billing, view account history, and generate reports.

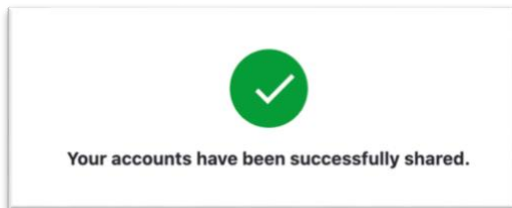
- Power Sharee

*With Power Sharee access, a user can perform all actions a **Sharee** can, but also can Share, Transfer, and Release Accounts.*

- Read Only

With Read Only access, a user can view all information pertinent to the account, however, they are only able to edit their user profile.

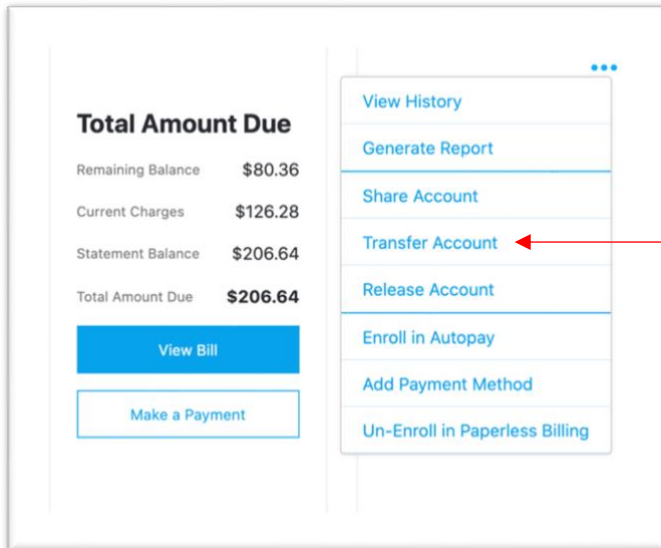
After selecting the Role and Access Type, Click **Share**. A message is displayed that the account(s) have been shared.



Transfer Account(s)

User this feature if you would like to transfer an account to another email/user and no longer have it on your account list view.

From the account detail view, click on the three blue horizontal dots on the right of the **Account Info** tile to display additional options. Select **Transfer Account**.



Transfer Accounts

Enter the email address of the person you would like to transfer the accounts to. This will make them the new owner of the accounts shown.

Accounts Selected
0000084914

Email
test@engie.com, test1@engie.com

Role

Access Type

If you need additional assistance visit our [Help Center](#) for additional information on how to get in touch with us.

Enter in the email(s) of the users you would like to transfer the account to.

Under the **Role** dropdown, select **customer**. Under the **Access Type** dropdown there are 4 options to choose from.

- Owner

With Owner access, the user will have access to everything you had as the owner.

- Sharee

With Sharee access, a user can view all information pertinent to the account, edit their user profile, pay bills, edit payment information, enroll in autopay & paperless billing, view account history, and generate reports.

Role
Customer

Access Type

- Owner
- Sharee
- Power Sharee
- Read Only

- Power Sharee

*With Power Sharee access, a user can perform all actions a **Sharee** can, but also can Share, Transfer, and Release Accounts.*

- Read Only

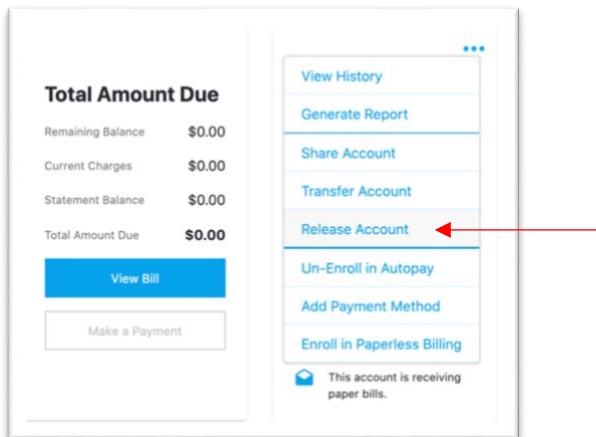
With Read Only access, a user can view all information pertinent to the account, however, they are only able to edit their user profile.

Once you have selected an **Access Type**, click **Transfer**. You will receive a success message.

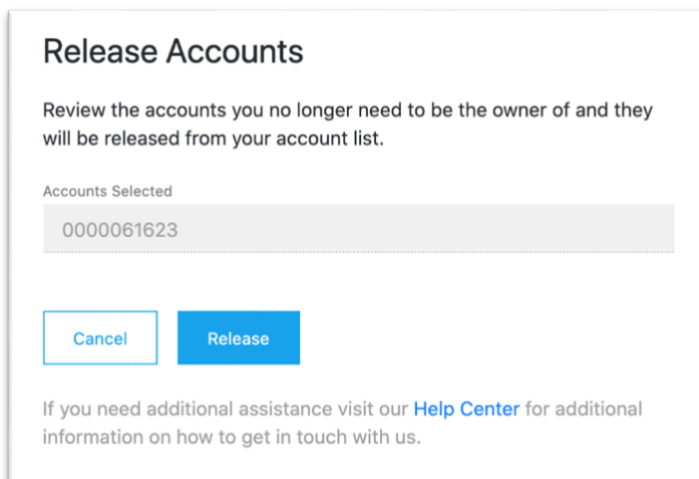
Release Account(s)

Use this feature if you no longer need to be the owner of an account, and the account(s) will be released from your account list.

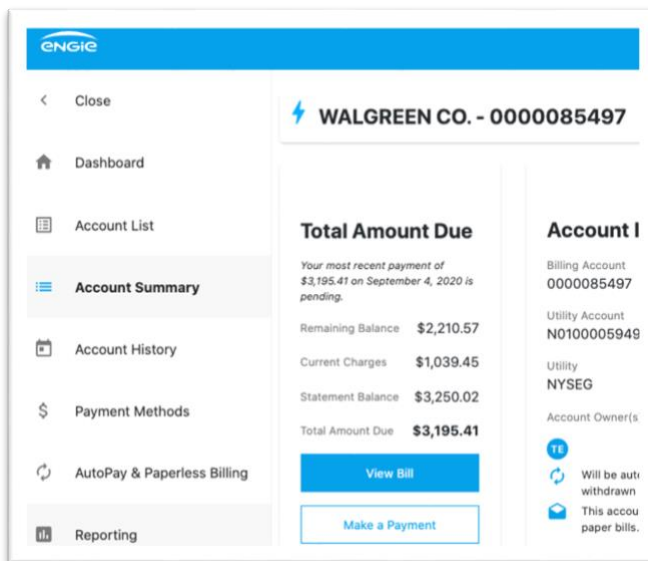
From the account detail view, click on the three blue horizontal dots on the right of the **Account Info** tile to display additional options. Select **Release Account**.



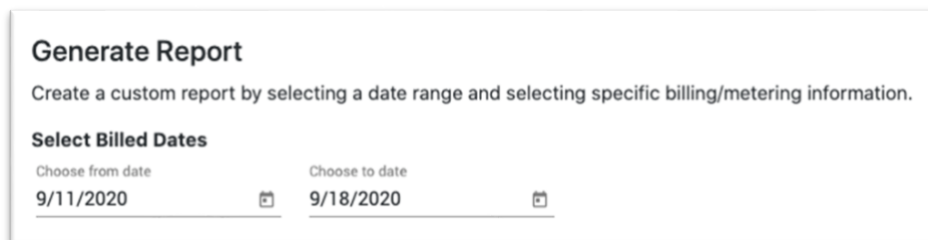
Click on **Release Account**. A new page will appear that shows the account(s) you would like to release. Click **Release** to continue. If the account has a status=dropped as well as zero balance your request will be successful and the account will be removed from your account list view.



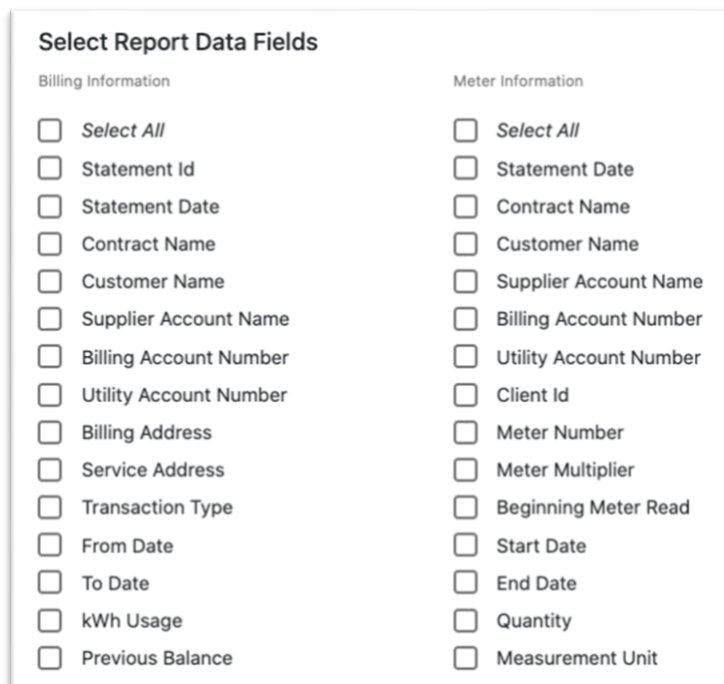
Generating a Report



When you are on an account, in the navigation bar on the left, click on the **Reporting** list item.



The **Generate Report** page displays a date range for the report. The page will default to the *To* billed date and the *From* billed date.



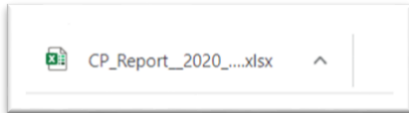
The page will display fields under two columns/sections: **Billing** and **Meter** information.

Select the checkboxes next to the items you wish to have in the report.



At the bottom of the page there is a toggle that you can turn on to save your preferences if you'd like to run the same report the next time you come into this page for the account.

Click **Generate Report** and an Excel download will appear at the bottom of your browser.

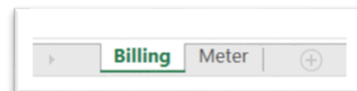


The excel file will have 2 tabs, one for **Billing Info** and one for **Meter Info**.

Billing Information

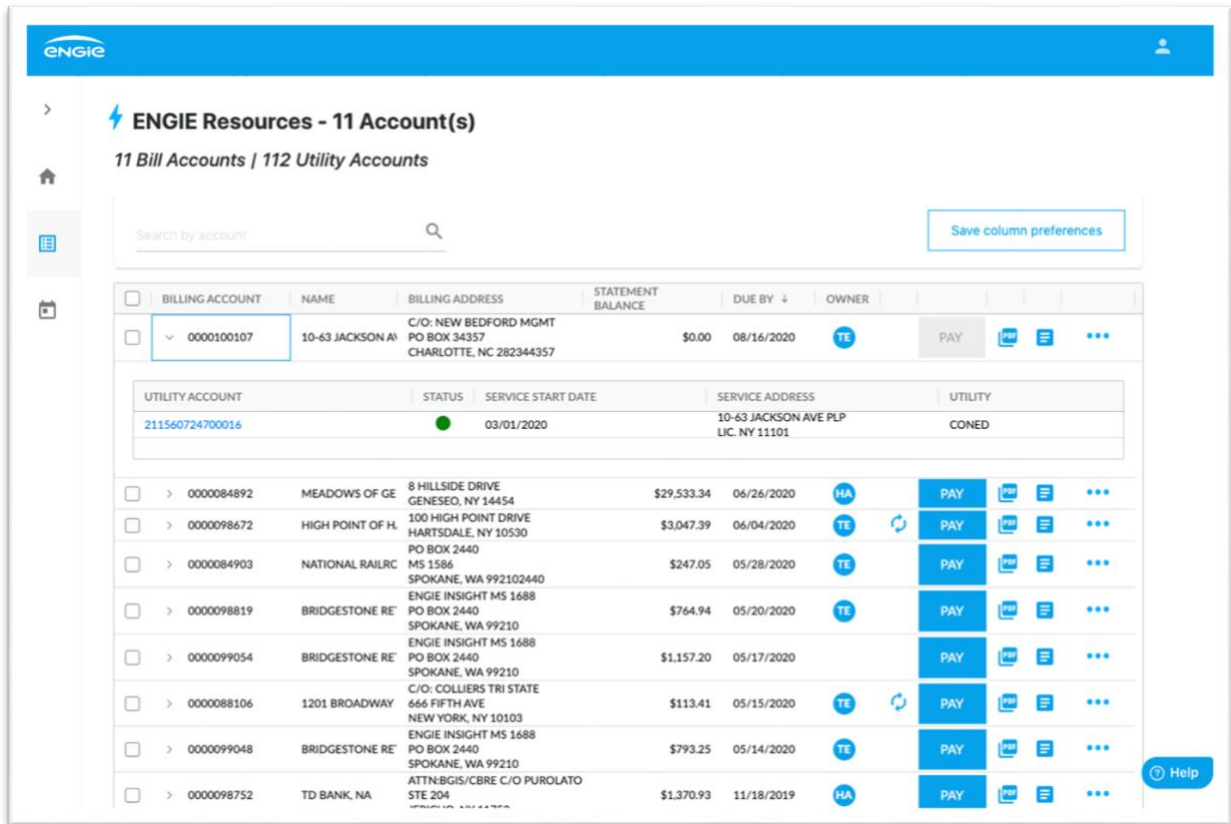
Customer Name	Supplier Account Number	Utility Account Number
VALGREEN CO.	1837773	N01000059493908
VALGREEN CO.	1837773	N01000059493908
VALGREEN CO.	1837773	N01000059493908
VALGREEN CO.	1837773	N01000059493908
VALGREEN CO.	1837773	N01000059493908
VALGREEN CO.	1837773	N01000059493908

Billing | Meter



View Your Account(s) - Scenario 3: Account Summary/Summary Bill

This view is when a user has summary bill accounts.



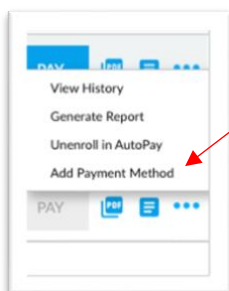
The screenshot shows the ENGIE account summary page. At the top, it says "ENGIE Resources - 11 Account(s)" and "11 Bill Accounts | 112 Utility Accounts". There is a search bar and a "Save column preferences" button. Below is a table of bill accounts with columns for BILLING ACCOUNT, NAME, BILLING ADDRESS, STATEMENT BALANCE, DUE BY, and OWNER. One bill account is expanded to show its utility accounts, with columns for UTILITY ACCOUNT, STATUS, SERVICE START DATE, SERVICE ADDRESS, and UTILITY. The expanded utility account is 211560724700016, with status "ON" and utility "CONED". Other bill accounts include MEADOWS OF GE, HIGH POINT OF H, NATIONAL RAILRC, BRIDGESTONE RE, and TD BANK, NA.

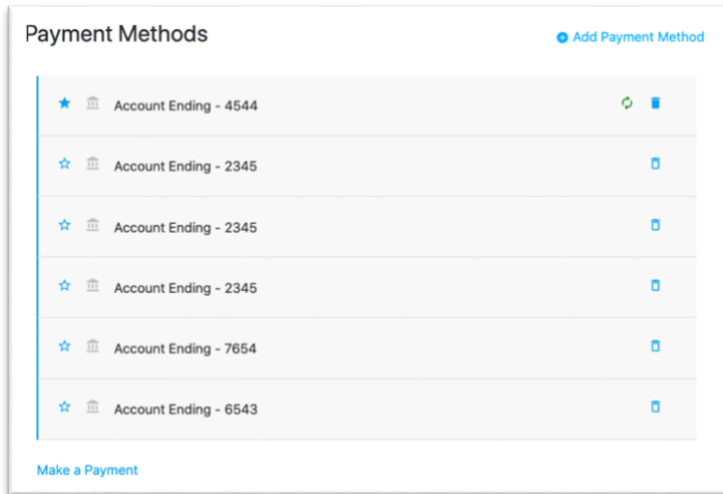
BILLING ACCOUNT	NAME	BILLING ADDRESS	STATEMENT BALANCE	DUE BY	OWNER	
0000100107	10-63 JACKSON A	C/O: NEW BEDFORD MGMT PO BOX 34357 CHARLOTTE, NC 282344357	\$0.00	08/16/2020	TE	PAY
UTILITY ACCOUNT						
211560724700016						
0000084892	MEADOWS OF GE	8 HILLSIDE DRIVE GENESEO, NY 14454	\$29,533.34	06/26/2020	HA	PAY
0000098672	HIGH POINT OF H	100 HIGH POINT DRIVE HARTSDALE, NY 10530	\$3,047.39	06/04/2020	TE	PAY
0000084903	NATIONAL RAILRC	PO BOX 2440 MS 1586 SPOKANE, WA 992102440	\$247.05	05/28/2020	TE	PAY
0000098819	BRIDGESTONE RE	PO BOX 2440 SPOKANE, WA 99210	\$764.94	05/20/2020	TE	PAY
0000099054	BRIDGESTONE RE	PO BOX 2440 SPOKANE, WA 99210	\$1,157.20	05/17/2020		PAY
0000088106	1201 BROADWAY	C/O: COLLIER'S TRI STATE 666 FIFTH AVE NEW YORK, NY 10103	\$113.41	05/15/2020	TE	PAY
0000099048	BRIDGESTONE RE	PO BOX 2440 SPOKANE, WA 99210	\$793.25	05/14/2020	TE	PAY
0000098752	TD BANK, NA	ATTN:BGIS/CBRE C/O PUROLATO STE. 204	\$1,370.93	11/18/2019	HA	PAY

The list view is shown in a parent/child relationship. All of your Bill Accounts will be displayed with info pertaining to the Bill Account level. If you select the caret (right arrow) it will expand to show the Utility Account(s) associated with it.

Add/Delete a Payment Method: Scenario 1

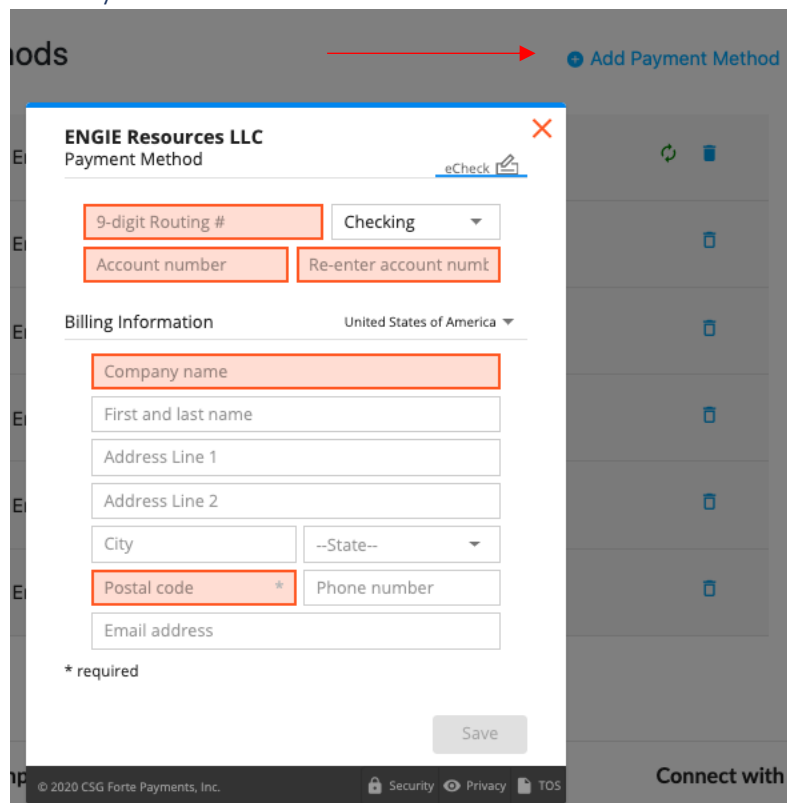
From your account list view, click on the three blue horizontal dots to display more options. Click on the **Add Payment Method** option.





This page will display all your current payment methods for this account.

Add Payment Method



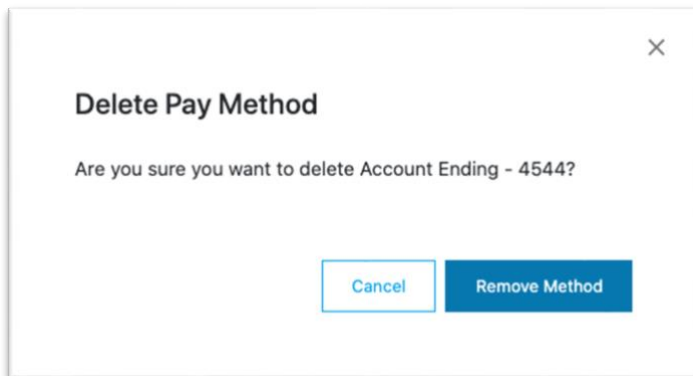
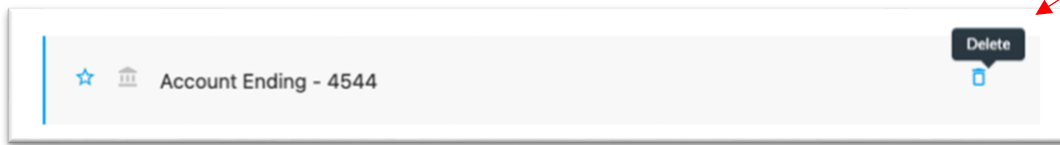
At the top right of the page there will be a **Add Payment Method** link.

Select this to be taken to a pop up that will have you enter in payment information. Please note at this time payments can only be made from a checking or savings account.

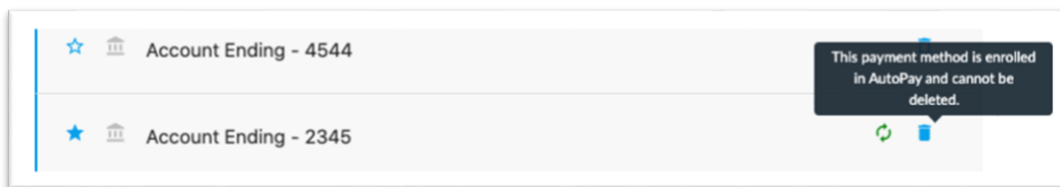
The required fields are shown to the left including: Routing #, Checking/Savings dropdown, Account Number, Re-enter account number, Company Name, and Postal Code.

Click **Save**, and you will see a confirmation message that your payment method has been added.

Delete Payment Method



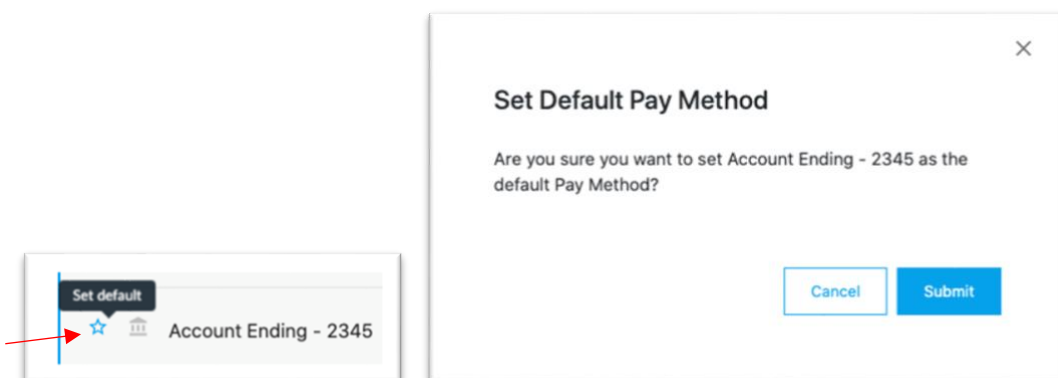
If you no longer need a payment method, you can remove it from the list. Click on the trash can icon to the right of the payment method to delete it. A pop up will appear asking you to confirm you want to delete the payment method. Click **Remove Method** to continue. The payment method will then be removed from the list.



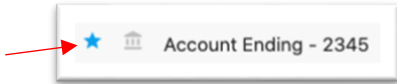
Please note that a payment **cannot** be deleted if it is the payment method that is enrolled in AutoPay. AutoPay is always tied to the default payment method. If you do want to delete a payment method that is associated with AutoPay, change the default payment method and it will tie AutoPay with that payment method.

Default Payment Method

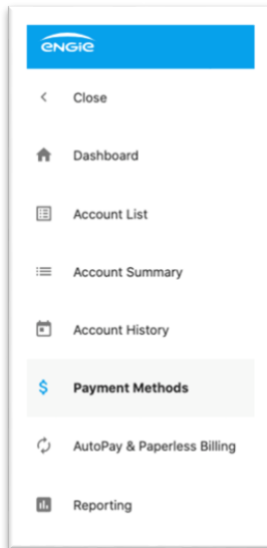
To change the default payment method, click on the star next to the account you would like to change it to.



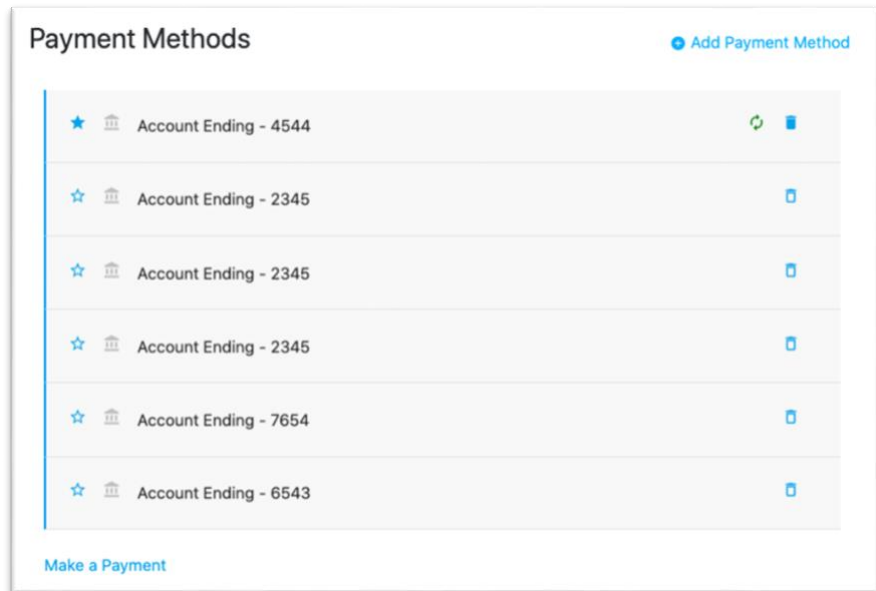
A pop up will appear, asking you to confirm you want to set it as the default pay method. Select **Submit** to continue. A blue star icon will now appear next to the new default pay method.



Add/Delete a Payment Method: Scenario 2



When you are on your account detail page, locate the menu on the left side of the screen. Click on **Payment Methods**. This page will display all your current payment methods for this account.



Add Payment Method

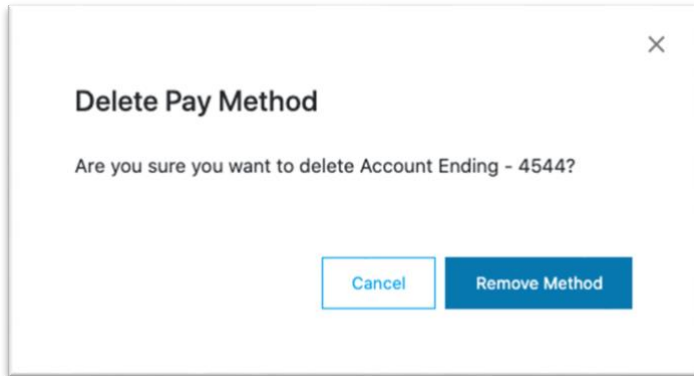
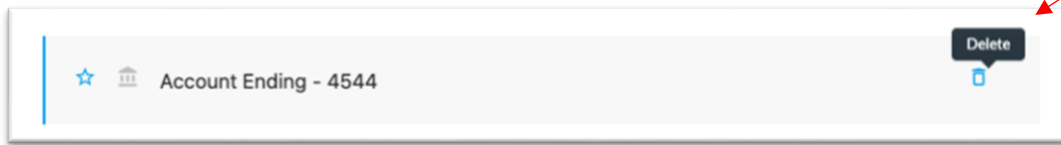
At the top right of the page there will be a **Add Payment Method** link.

Select this to be taken to a pop up that will have you enter in payment information. Please note at this time payments can only be made from a checking or savings account.

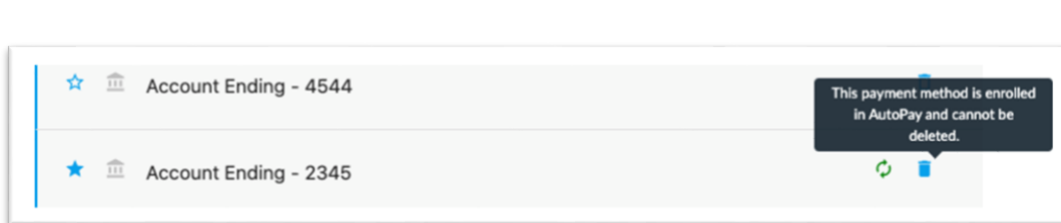
The required fields are shown to the left including: Routing #, Checking/Savings dropdown, Account Number, Re-enter account number, Company Name, and Postal Code.

Click **Save**, and you will see a confirmation message that your payment method has been added.

Delete Payment Method



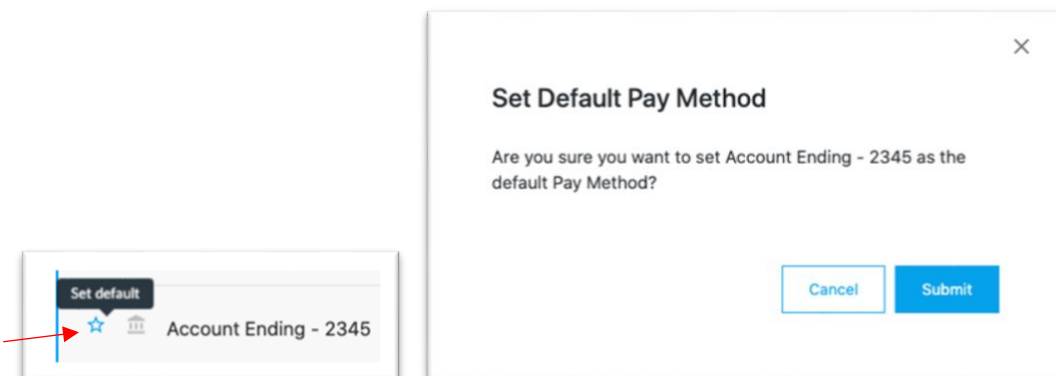
If you no longer need a payment method, you can remove it from the list. Click on the trash can icon to the right of the payment method to delete it. A pop up will appear asking you to confirm you want to delete the payment method. Click **Remove Method** to continue. The payment method will then be removed from the list.



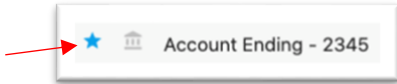
Please note that a payment **cannot** be deleted if it is the payment method that is enrolled in AutoPay. AutoPay is always tied to the default payment method. If you do want to delete a payment method that is associated with AutoPay, change the default payment method and it will tie AutoPay with that payment method.

Default Payment Method

To change the default payment method, click on the star next to the account you would like to change it to.



A pop up will appear, asking you to confirm you want to set it as the default pay method. Select **Submit** to continue. A blue star icon will now appear next to the new default pay method.



Make a Payment

From your account list view, on the right side, click on the **Pay** button.

<input type="checkbox"/>	BILLING ACCOUNT	UTILITY ACCOUNT	STATUS	SERVICE START	SERVICE ADDRESS	UTILITY	OWNER	STATEMENT BALANCE	DUE BY			
<input type="checkbox"/>	0000085497	N01000059493908	●	12/01/2019	116 CHURCH ST GRANVILLE, NY 12832	NYSEG	TE	\$3,250.02	07/17/2020		PAY	

The button will be disabled if there is no balance on the account. If the button is enabled you can click it to make a payment. It will direct you to the **Payment** screen.

Total Amount Due

\$3,195.41

AutoPay applied for Jul 17

[View Bill](#)

Please Note: This is the final step to submit your payment. Be sure to double check that all of your information is correct!

Payment Amount ▼

Payment Date 📅

9/18/2020

Payments can be scheduled up to and including your due date. Please select a date between today and your next due date.

Payment Method ▼

Submit Payment

Total Amount Due

\$3,195.41

AutoPay applied for Jul 17

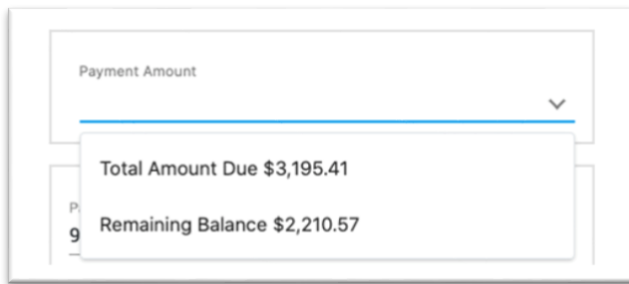
[View Bill](#)

The top section will show your total amount due and if it is enrolled in AutoPay, a message will appear here to indicate that. You can still proceed even though you are enrolled in AutoPay if you want to make a one-time payment.

[View Bill](#)

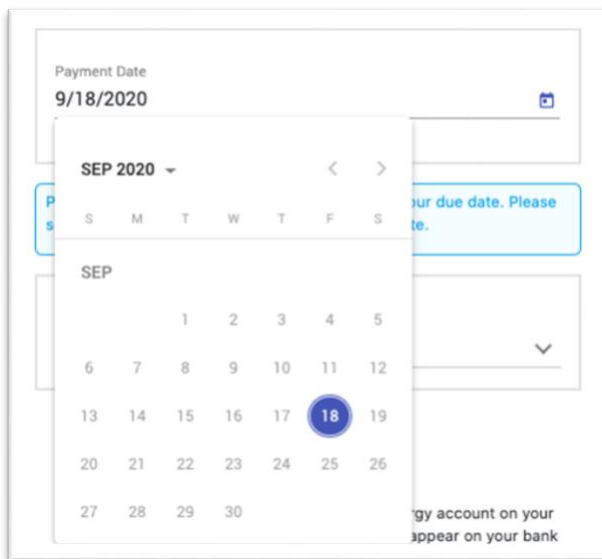
You can also view your bill you are paying on here. This will open up a PDF of the statement.

Payment Amount



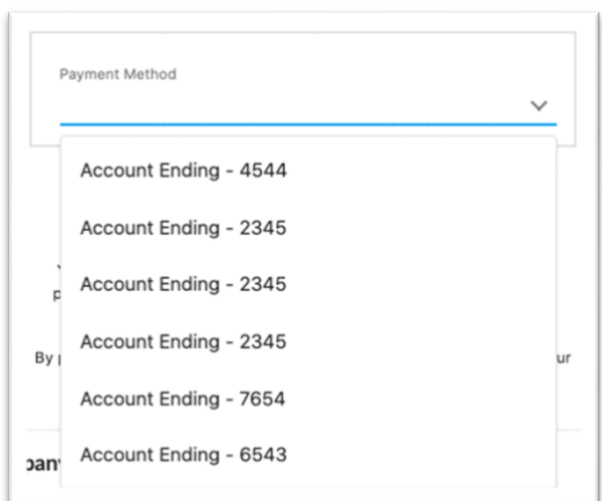
When clicking on the caret (down arrow), you will see the total amount due and the remaining balance.

Payment Date



The payment date will automatically default to the current day. Payments can be scheduled up to and including your due date.

Payment Method



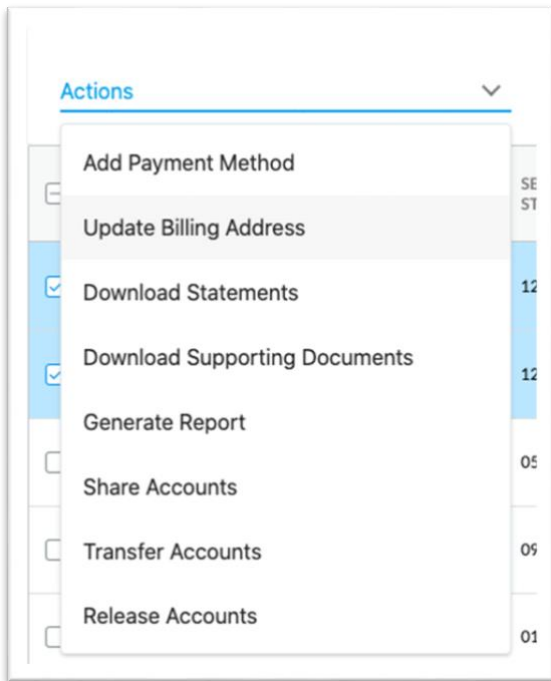
When clicking on the caret (down arrow), you will see all of your payment methods that have been added. Click on the payment method you would like to use, then click the **submit payment** button. You will receive a confirmation message saying that your payment has been made.

Update Billing Address for one or Multiple Accounts

On the account list view, to the left of your accounts you will see a checkbox. Click on one or more checkboxes of the accounts you would like to update.

	BILLING ACCOUNT	UTILITY ACCOUNT	STATUS	SERVICE START	SERVICE ADDRESS	UTILITY	OWNER	STATEMENT BALANCE	DUE BY			
<input checked="" type="checkbox"/>	0000085497	N0100059493908	●	12/01/2019	116 CHURCH ST GRANVILLE, NY 12832	NYSEG	TE	\$3,250.02	07/17/2020	🔄	PAY	📄 📄 ⋮
<input checked="" type="checkbox"/>	0000096520	N0100059305813	●	12/01/2015	6785 TRANSIT RD BUFFALO, NY 14221	NYSEG	TE	\$3,029.15	07/17/2020	🔄	PAY	📄 📄 ⋮

A dropdown named **Actions** will appear. Click **Update Billing Address**.



This will take you to the **Update Billing Address** page. Enter the information you would like updated, and press save. Once you go back to your account list view, the changes will be updated.

Update Billing Address

Apply a single billing address to multiple accounts

Selected Accounts
0000085497

Address Line 1

Address Line 2

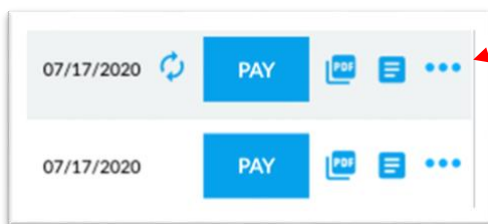
City _____ State _____

Postal Code

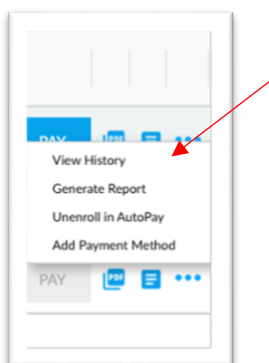
Billing Email Address

View Account History

From your account list view, click on the three blue horizontal dots to display more options.



Click on the **View History** option.



The account will default to the account you are on. You can then select the date range and press **Search**. This will then display all of your previous activity specific to the account you selected.

Account: 0000085497 From Date: 6/20/2020 To Date: 9/18/2020 Search Filter by type, status...

BILLING ACCOUNT	TYPE	STATUS	PAYMENT AMOUNT	TRANSACTION DATE	STATEMENT PERIOD	USAGE	CURRENT CHARGES	STATEMENT BALANCE
0000085497	eCheck	Pending	(\$3,195.41)	09/04/2020				
0000085497	eCheck	Pending	(\$3,400.23)	09/03/2020				
0000085497	eCheck	Pending	(\$3,195.41)	09/03/2020				
0000085497	eCheck	Pending	(\$3,195.41)	09/02/2020				
0000085497	eCheck	Cancelled	(\$2,210.57)	07/15/2020				
0000085497	eCheck	Cancelled	(\$2,210.57)	07/13/2020				
0000085497	eCheck	Cancelled	(\$2,210.57)	07/13/2020				
0000085497	eCheck	Cancelled	(\$2,210.57)	07/10/2020				
0000085497	eCheck	Cancelled	(\$2,210.57)	07/10/2020				
0000085497	eCheck	Cancelled	(\$2,210.57)	07/10/2020				

1 to 10 of 12 Page 1 of 2 Rows per page: 10 Export to Excel

You can change the **rows per page** at the bottom as well as **download** the table in excel. (The download will only use the data from your selected date range.)

You can filter by billing account number, type, status, and usage. Once you start typing it will automatically narrow down the list. You don't have to press the search icon after.

Account: 0000085497 From Date: 6/20/2020 To Date: 9/18/2020 Search can

BILLING ACCOUNT	TYPE	STATUS	PAYMENT AMOUNT	TRANSACTION DATE	STATEMENT PERIOD	USAGE	CURRENT CHARGES	STATEMENT BALANCE
0000085497	eCheck	Cancelled	(\$2,210.57)	07/15/2020				
0000085497	eCheck	Cancelled	(\$2,210.57)	07/13/2020				
0000085497	eCheck	Cancelled	(\$2,210.57)	07/13/2020				
0000085497	eCheck	Cancelled	(\$2,210.57)	07/10/2020				
0000085497	eCheck	Cancelled	(\$2,210.57)	07/10/2020				
0000085497	eCheck	Cancelled	(\$2,210.57)	07/10/2020				
0000085497	eCheck	Cancelled	(\$2,210.57)	07/10/2020				
0000085497	eCheck	Cancelled	(\$2,210.57)	07/10/2020				

1 to 8 of 8 Page 1 of 1

Cancel a Pending Payment

Note- a payment can only be cancelled if the status is 'pending'

Locate the payment in the table. Click on the **blue 'x' icon** next so the **scheduled** payment

0000098672	eCheck	Scheduled	05/27/2020	(\$3,047.39)	\$0.00
0000098672	eCheck	Scheduled	05/27/2020	(\$3,047.39)	\$0.00

A confirmation modal appears. Click **Cancel Payment** to continue.

✕

Cancel Scheduled Payment

Are you sure you want to cancel this payment?

Don't Cancel
Cancel Payment

Share Account(s)

Use this feature if you would like to share an account to another email/user and also have it on your account list view to access.

From the account list view, click on the three blue horizontal dots on the right of the account to display additional options.

<input type="checkbox"/>	BILLING ACCOUNT	UTILITY ACCOUNT	STATUS	SERVICE START	SERVICE ADDRESS	UTILITY	OWNER	STATEMENT BALANCE	DUE BY				
<input type="checkbox"/>	0000084914	522518023300007	●	02/01/2020	940 WYNNEWOOD R PELHAM MANOR, NY	CONED	TE	\$206.64	05/29/2020	PAY			

Select **Share Account** from the menu options.

- View History
 - Generate Report
 - Share Account ←
 - Transfer Account
 - Release Account
 - Enroll in AutoPay
 - Add Payment Method

Share Accounts

Enter the email address of the person you would like to share the accounts with. This will allow the user to access the same account with limited permissions.

Accounts Selected
0000084914

Email
test@engie.com, test1@engie.com

Role

Access Type

If you need additional assistance visit our [Help Center](#) for additional information on how to get in touch with us.

The **Share Accounts** screen will appear where you can enter one or more email address in which you want to share the specified account with.

Under the **Role** dropdown, select either *Customer* or *Partner*.

Email
test@engie.com, test2@engie.com

Role
Customer

Customer

Partner

There are three different **Access Types** associated with both **Customer/Partner** Roles. Select the access type you would like the email to have permissions for.

Role
Customer

Access Type

Sharee

Power Sharee

Read Only

- Sharee

With Sharee access, a user can view all information pertinent to the account, edit their user profile, pay bills, edit payment information, enroll in autopay & paperless billing, view account history, and generate reports.

- Power Sharee

*With Power Sharee access, a user can perform all actions a **Sharee** can, but also can Share, Transfer, and Release Accounts.*

Role
Partner

Access Type

Sharee

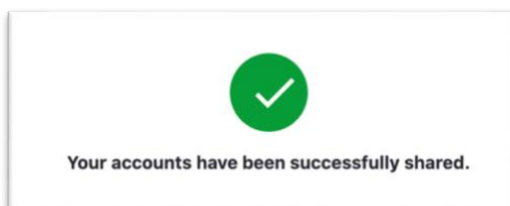
Power Sharee

Read Only

- Read Only

With Read Only access, a user can view all information pertinent to the account, however, they are only able to edit their user profile.


After selecting the Role and Access Type, Click **Share**. A message is displayed that the account(s) have been shared.



Transfer Account(s)

User this feature if you would like to transfer an account to another email/user and no longer have it on your account list view.

From the account list view, click on the three blue horizontal dots on the right of the account to display additional options.

<input type="checkbox"/>	BILLING ACCOUNT	UTILITY ACCOUNT	STATUS	SERVICE START	SERVICE ADDRESS	UTILITY	OWNER	STATEMENT BALANCE	DUE BY			
<input type="checkbox"/>	0000084914	522518023300007	●	02/01/2020	940 WYNNEWOOD R PELHAM MANOR, NY	CONED	TE	\$206.64	05/29/2020	PAY		Additional Options

- View History
- Generate Report
- Share Account
- Transfer Account
- Release Account
- Enroll in AutoPay
- Add Payment Method

Transfer Accounts

Enter the email address of the person you would like to transfer the accounts to. This will make them the new owner of the accounts shown.

Accounts Selected

0000084914

Email
test@engie.com, test@engie.com

Role

Access Type

[Cancel](#) [Transfer](#)

If you need additional assistance visit our [Help Center](#) for additional information on how to get in touch with us.

Role

Customer

Access Type

- Owner
- Sharee
- Power Sharee
- Read Only

Enter in the email(s) of the users you would like to transfer the account to.

Under the **Role** dropdown, select **customer**. Under the **Access Type** dropdown there are 4 options to choose from.

- Owner

With Owner access, the user will have access to everything you had as the owner.

- Sharee

With Sharee access, a user can view all information pertinent to the account, edit their user profile, pay bills, edit payment information, enroll in autopay & paperless billing, view account history, and generate reports.

- Power Sharee

*With Power Sharee access, a user can perform all actions a **Sharee** can, but also can Share, Transfer, and Release Accounts.*

- Read Only

With Read Only access, a user can view all information pertinent to the account, however, they are only able to edit their user profile.

Once you have selected an **Access Type**, click **Transfer**. You will receive a success message.

Release Account(s)

User this feature if you no longer need to be the owner of an account, and the account(s) will be released from your account list.

From the account list view, click on the three blue horizontal dots on the right of the account to display additional options.

<input type="checkbox"/>	BILLING ACCOUNT	UTILITY ACCOUNT	STATUS	SERVICE START	SERVICE ADDRESS	UTILITY	OWNER	STATEMENT BALANCE	DUE BY			
<input type="checkbox"/>	0000084914	522518023300007	●	02/01/2020	940 WYNNEWOOD R PELHAM MANOR, NY	CONED	TE	\$206.64	05/29/2020	PAY	☰	☰

Additional Options

- View History
- Generate Report
- Share Account
- Transfer Account
- Release Account
- Enroll in AutoPay
- Add Payment Method

Click on **Release Account**. A new page will appear that shows the account(s) you would like to release. Click **Release** to continue. If the account has a status=dropped as well as zero balance your request will be successful and the account will be removed from your account list view.

Release Accounts

Review the accounts you no longer need to be the owner of and they will be released from your account list.

Accounts Selected

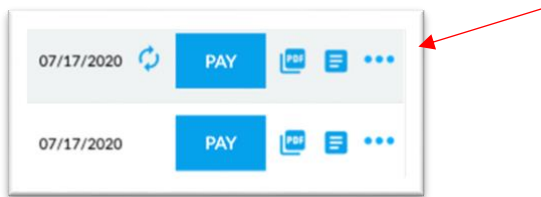
0000061623

Cancel
Release

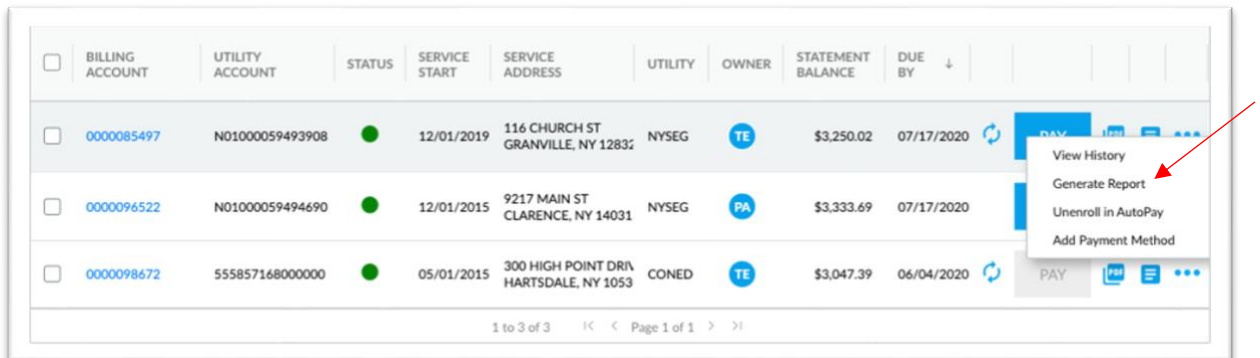
If you need additional assistance visit our [Help Center](#) for additional information on how to get in touch with us.

Generate Report

From your account list view, click on the three blue horizontal dots to display more options.



Click on the **Generate Report** option.



Generate Report

Create a custom report by selecting a date range and selecting specific billing/metering information.

Select Billed Dates

Choose from date Choose to date

The **Generate Report** page displays a date range for the report. The page will default to the *To* billed date and the *From* billed date.

Select Report Data Fields

Billing Information	Meter Information
<input type="checkbox"/> <i>Select All</i>	<input type="checkbox"/> <i>Select All</i>
<input type="checkbox"/> Statement Id	<input type="checkbox"/> Statement Date
<input type="checkbox"/> Statement Date	<input type="checkbox"/> Contract Name
<input type="checkbox"/> Contract Name	<input type="checkbox"/> Customer Name
<input type="checkbox"/> Customer Name	<input type="checkbox"/> Supplier Account Name
<input type="checkbox"/> Supplier Account Name	<input type="checkbox"/> Billing Account Number
<input type="checkbox"/> Billing Account Number	<input type="checkbox"/> Utility Account Number
<input type="checkbox"/> Utility Account Number	<input type="checkbox"/> Client Id
<input type="checkbox"/> Billing Address	<input type="checkbox"/> Meter Number
<input type="checkbox"/> Service Address	<input type="checkbox"/> Meter Multiplier
<input type="checkbox"/> Transaction Type	<input type="checkbox"/> Beginning Meter Read
<input type="checkbox"/> From Date	<input type="checkbox"/> Start Date
<input type="checkbox"/> To Date	<input type="checkbox"/> End Date
<input type="checkbox"/> kWh Usage	<input type="checkbox"/> Quantity
<input type="checkbox"/> Previous Balance	<input type="checkbox"/> Measurement Unit

The page will display fields under two columns/sections: **Billing** and **Meter** information.

Select the checkboxes next to the items you wish to have in the report.

Save Preferences

At the bottom of the page there is a toggle that you can turn on to save your preferences if you'd like to run the same report the next time you come into this page for the account.

Click **Generate Report** and an Excel download will appear at the bottom of your browser.



The excel file will have 2 tabs, one for **Billing Info** and one for **Meter Info**.

Billing Information



Customer Name	Supplier Account Number	Utility Account Number
VALGREEN CO.	1837773	N01000059493908
VALGREEN CO.	1837773	N01000059493908
VALGREEN CO.	1837773	N01000059493908
VALGREEN CO.	1837773	N01000059493908
VALGREEN CO.	1837773	N01000059493908
VALGREEN CO.	1837773	N01000059493908

Billing Meter

Billing Meter

Enroll in AutoPay

When you are on your account list view, click on the three horizontal blue dots at the right of the account you wish to enroll in AutoPay. If an account is enrolled in AutoPay, there will be a blue icon stating it is enrolled.



View History

Generate Report

Enroll in AutoPay

Add Payment Method

Click the option **Enroll in AutoPay**. This will take you to the **AutoPay & Paperless Billing** page for that specific account.

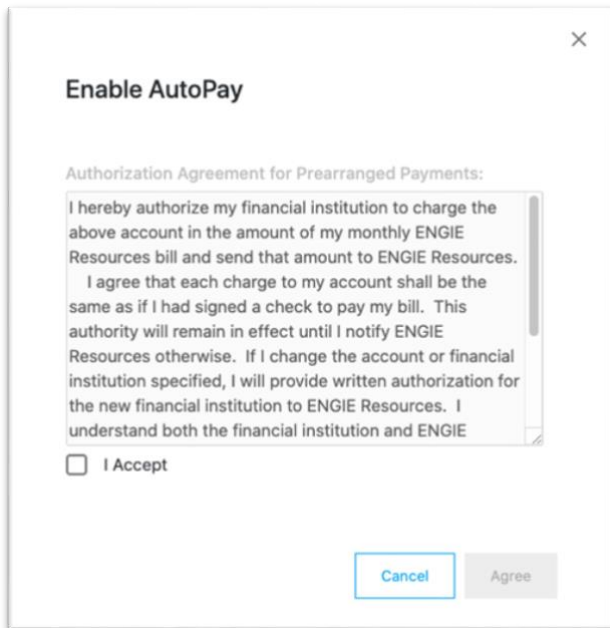
AutoPay & Paperless Billing

Account number: 0000085497

AutoPay Status

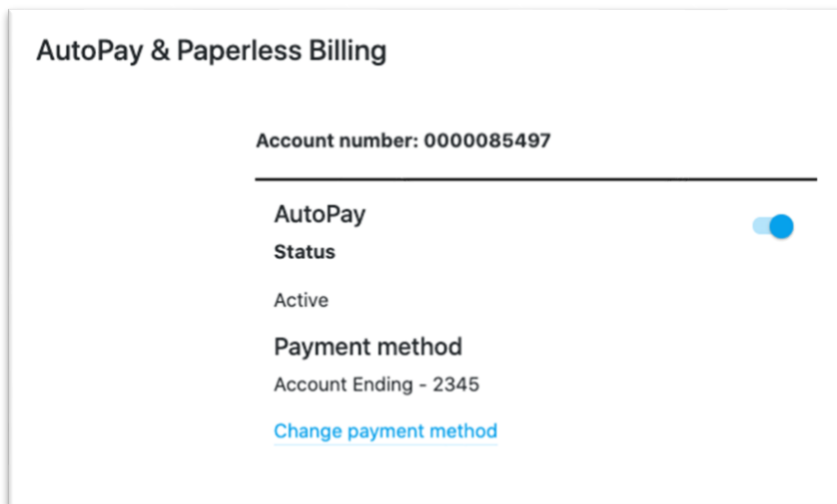
Inactive

Click on the toggle to turn on. This will display a confirmation to authorize AutoPay for the account selected. Select the checkbox next to **I Accept**. Then the **Agree** button will be enabled to select.



The image shows a dialog box titled "Enable AutoPay" with a close button (X) in the top right corner. Below the title is the heading "Authorization Agreement for Prearranged Payments:". The main content is a scrollable text area containing the following text: "I hereby authorize my financial institution to charge the above account in the amount of my monthly ENGIE Resources bill and send that amount to ENGIE Resources. I agree that each charge to my account shall be the same as if I had signed a check to pay my bill. This authority will remain in effect until I notify ENGIE Resources otherwise. If I change the account or financial institution specified, I will provide written authorization for the new financial institution to ENGIE Resources. I understand both the financial institution and ENGIE". Below the text area is a checkbox labeled "I Accept". At the bottom of the dialog are two buttons: "Cancel" and "Agree".

The toggle is now on and active with the default payment method used.



The image shows a settings panel titled "AutoPay & Paperless Billing". At the top, it displays "Account number: 0000085497". Below this is a horizontal line. Under the line, the "AutoPay" status is shown as "Active" with a blue toggle switch turned on. Below the status, the "Payment method" is listed as "Account Ending - 2345". At the bottom, there is a blue link labeled "Change payment method".

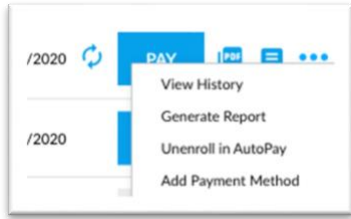
Un-Enroll in AutoPay

When you are on your account list view, click on the three horizontal blue dots at the right of the

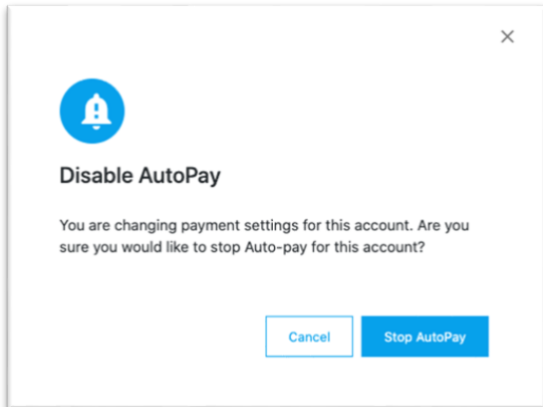


account. If an account is enrolled in AutoPay, there will be a blue icon stating it is enrolled.

Click Un-Enroll in AutoPay.



A confirmation pop up will display. Click **Stop AutoPay**.



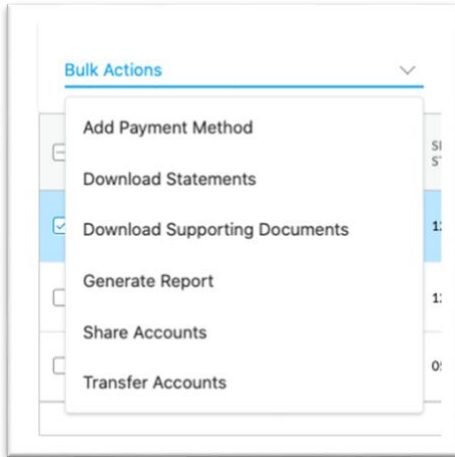
The toggle is now off and the AutoPay is off.



Bulk Actions

On the account list view, to the left of your accounts you will see a checkbox. Click on one or more checkboxes and a dropdown named **Actions** will appear.

Bulk Actions									
BILLING ACCOUNT	NAME	BILLING ADDRESS	STATEMENT BALANCE	DUE BY	OWNER				
<input checked="" type="checkbox"/>	> 0000100107	10-63 JACKSON A	C/O: NEW BEDFORD MGMT PO BOX 34357 CHARLOTTE, NC 282344357	\$0.00	08/16/2020	TE	PAY	PDF	...
<input checked="" type="checkbox"/>	> 0000084892	MEADOWS OF GE	8 HILLSIDE DRIVE GENESEO, NY 14454	\$29,533.34	06/26/2020	HA	PAY	PDF	...
<input checked="" type="checkbox"/>	> 0000098672	HIGH POINT OF HL	100 HIGH POINT DRIVE HARTSDALE, NY 10530	\$3,047.39	06/04/2020	TE	PAY	PDF	...

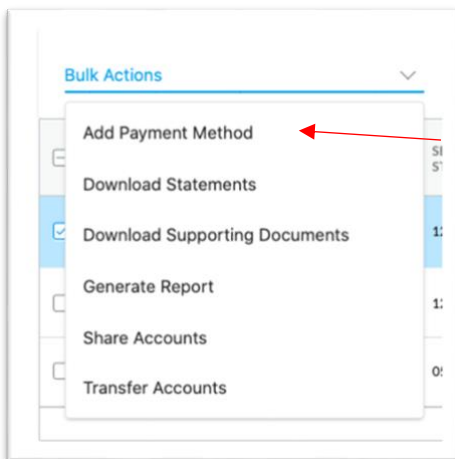


You can select from multiple options:

Bulk Add Payment Method – Add a Payment Method for Multiple Accounts

On the account list view, to the left of your accounts you will see a checkbox. Click on one or more checkboxes and a dropdown named **Actions** will appear. Click on **Apply Payment Method**.

BILLING ACCOUNT	NAME	BILLING ADDRESS	STATEMENT BALANCE	DUE BY	OWNER	
<input checked="" type="checkbox"/> > 0000100107	10-63 JACKSON A	C/O- NEW BEDFORD MGMT PO BOX 34357 CHARLOTTE, NC 282344357	\$0.00	08/16/2020	TE	PAY PDF [Menu] ...
<input checked="" type="checkbox"/> > 0000084892	MEADOWS OF GE	8 HILLSIDE DRIVE GENESEO, NY 14454	\$29,533.34	06/26/2020	HA	PAY PDF [Menu] ...
<input checked="" type="checkbox"/> > 0000098672	HIGH POINT OF H	100 HIGH POINT DRIVE HARTSDALE, NY 10530	\$3,047.39	06/04/2020	TE	PAY PDF [Menu] ...



This will take you to the **Apply Payment Method** screen. On the left you will see the selected accounts you will be applying the change to. Please note that if you do not have permissions to apply payment methods to certain accounts, it will not display on the left.

Next, fill out all of the payment information. If you would like to set this payment method as the default payment method for the selected accounts, select the checkbox at the bottom.

Also, If you would like to turn on AutoPay for those selected accounts, select the second box **Turn on AutoPay for all accounts**.

Apply Payment Method

Add a single payment method to multiple accounts

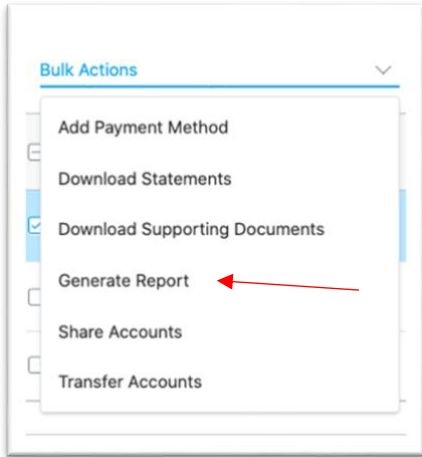
Selected Accounts	Routing Number	Confirm Routing Number
0000085497	<input type="text"/>	<input type="text"/>
0000096522	Account Number	Confirm Account Number
	<input type="text"/>	<input type="text"/>
	Account Type ▼	
	<input type="text"/>	
	Name (First and Last or Company Name)	
	<input type="text"/>	
	<input type="checkbox"/> Set as default payment method <input type="checkbox"/> Turn on AutoPay for all accounts	
	<input type="button" value="Cancel"/>	<input type="button" value="Save"/>

Bulk Generate Report – Generate a Report for Multiple Accounts

On the account list view, to the left of your accounts you will see a checkbox. Click on one or more checkboxes and a dropdown named **Actions** will appear. Click **Generate Report**.

Bulk Actions ▼

	BILLING ACCOUNT	NAME	BILLING ADDRESS	STATEMENT BALANCE	DUE BY ↓	OWNER	
<input checked="" type="checkbox"/>	> 0000100107	10-63 JACKSON A	C/O: NEW BEDFORD MGMT PO BOX 34357 CHARLOTTE, NC 282344357	\$0.00	08/16/2020	TE	PAY <input type="button" value="PAY"/> <input type="button" value="PAY"/> <input type="button" value="PAY"/> <input type="button" value="PAY"/>
<input checked="" type="checkbox"/>	> 0000084892	MEADOWS OF GE	8 HILLSIDE DRIVE GENESEO, NY 14454	\$29,533.34	06/26/2020	HA	PAY <input type="button" value="PAY"/> <input type="button" value="PAY"/> <input type="button" value="PAY"/> <input type="button" value="PAY"/>
<input checked="" type="checkbox"/>	> 0000098672	HIGH POINT OF H.	100 HIGH POINT DRIVE HARTSDALE, NY 10530	\$3,047.39	06/04/2020	TE <input type="button" value="RENEW"/>	PAY <input type="button" value="PAY"/> <input type="button" value="PAY"/> <input type="button" value="PAY"/> <input type="button" value="PAY"/>



Generate Report

Create a custom report by selecting a date range and selecting specific billing/metering information.

Select Billed Dates

Choose from date: 9/11/2020 Choose to date: 9/18/2020

The **Generate Report** page displays a date range for the report. The page will default to the *To* billed date and the *From* billed date.

Select Report Data Fields

Billing Information	Meter Information
<input type="checkbox"/> Select All	<input type="checkbox"/> Select All
<input type="checkbox"/> Statement Id	<input type="checkbox"/> Statement Date
<input type="checkbox"/> Statement Date	<input type="checkbox"/> Contract Name
<input type="checkbox"/> Contract Name	<input type="checkbox"/> Customer Name
<input type="checkbox"/> Customer Name	<input type="checkbox"/> Supplier Account Name
<input type="checkbox"/> Supplier Account Name	<input type="checkbox"/> Billing Account Number
<input type="checkbox"/> Billing Account Number	<input type="checkbox"/> Utility Account Number
<input type="checkbox"/> Utility Account Number	<input type="checkbox"/> Client Id
<input type="checkbox"/> Billing Address	<input type="checkbox"/> Meter Number
<input type="checkbox"/> Service Address	<input type="checkbox"/> Meter Multiplier
<input type="checkbox"/> Transaction Type	<input type="checkbox"/> Beginning Meter Read
<input type="checkbox"/> From Date	<input type="checkbox"/> Start Date
<input type="checkbox"/> To Date	<input type="checkbox"/> End Date
<input type="checkbox"/> kWh Usage	<input type="checkbox"/> Quantity
<input type="checkbox"/> Previous Balance	<input type="checkbox"/> Measurement Unit

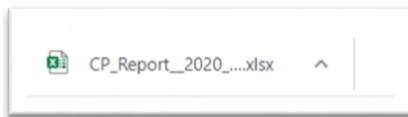
The page will display fields under two columns/sections: **Billing** and **Meter** information.

Select the checkboxes next to the items you wish to have in the report.

Save Preferences


At the bottom of the page there is a toggle that you can turn on to save your preferences if you'd like to run the same report the next time you come into this page for the account.

Click **Generate Report** and an Excel download will appear at the bottom of your browser.



The excel file will have 2 tabs, one for **Billing Info** and one for **Meter Info**.

Billing Information



Customer Name	Supplier Account Number	Utility Account Number
VALGREEN CO.	1837773	N01000059493908
VALGREEN CO.	1837773	N01000059493908
VALGREEN CO.	1837773	N01000059493908
VALGREEN CO.	1837773	N01000059493908
VALGREEN CO.	1837773	N01000059493908
VALGREEN CO.	1837773	N01000059493908

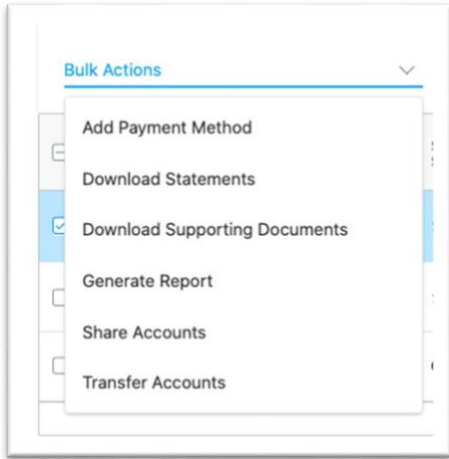
Billing Meter

Bulk Download Statements – Download Statements (bills) for Multiple Accounts

On the account list view, to the left of your accounts you will see a checkbox. Click on one or more checkboxes and a dropdown named **Actions** will appear. Click **Download Statements**. At the bottom of the browser the PDF's will appear.

Bulk Actions

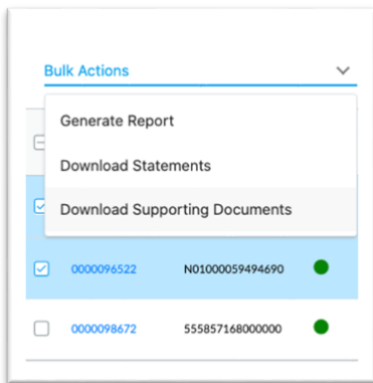
BILLING ACCOUNT	NAME	BILLING ADDRESS	STATEMENT BALANCE	DUE BY ↓	OWNER				
<input checked="" type="checkbox"/> > 0000100107	10-63 JACKSON A	C/O: NEW BEDFORD MGMT PO BOX 34357 CHARLOTTE, NC 282344357	\$0.00	08/16/2020	TE	PAY	PM	☰	⋮
<input checked="" type="checkbox"/> > 0000084892	MEADOWS OF GE	8 HILLSIDE DRIVE GENESEO, NY 14454	\$29,533.34	06/26/2020	HA	PAY	PM	☰	⋮
<input checked="" type="checkbox"/> > 0000098672	HIGH POINT OF H.	100 HIGH POINT DRIVE HARTSDALE, NY 10530	\$3,047.39	06/04/2020	TE	PAY	PM	☰	⋮



Bulk Download Supporting Documents – Download Supporting Documents for Multiple Accounts

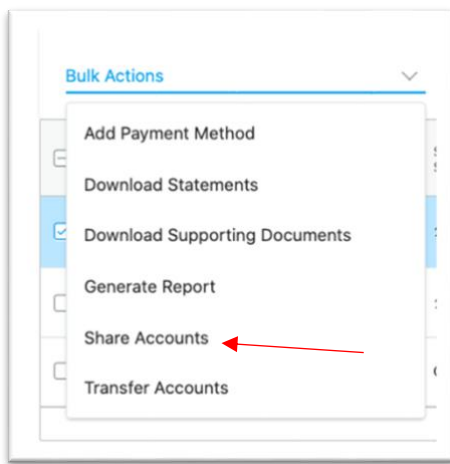
On the account list view, to the left of your accounts you will see a checkbox. Click on one or more checkboxes and a dropdown named **Actions** will appear. Click **Download Supporting Documents**. At the bottom of the browser the excel files will appear.

BILLING ACCOUNT	NAME	BILLING ADDRESS	STATEMENT BALANCE	DUE BY ↓	OWNER				
<input checked="" type="checkbox"/> > 0000100107	10-63 JACKSON A	C/O: NEW BEDFORD MGMT PO BOX 34357 CHARLOTTE, NC 282344357	\$0.00	08/16/2020	TE	PAY	PDF	☰	⋮
<input checked="" type="checkbox"/> > 0000084892	MEADOWS OF GE	8 HILLSIDE DRIVE GENESEO, NY 14454	\$29,533.34	06/26/2020	HA	PAY	PDF	☰	⋮
<input checked="" type="checkbox"/> > 0000098672	HIGH POINT OF H.	100 HIGH POINT DRIVE HARTSDALE, NY 10530	\$3,047.39	06/04/2020	TE	↻ PAY	PDF	☰	⋮



Bulk Share Accounts – Share Multiple Accounts at Once

BILLING ACCOUNT	NAME	BILLING ADDRESS	STATEMENT BALANCE	DUE BY ↓	OWNER					
<input checked="" type="checkbox"/>	> 0000100107	10-63 JACKSON A	C/O: NEW BEDFORD MGMT PO BOX 34357 CHARLOTTE, NC 282344357	\$0.00	08/16/2020	TE	PAY	PM	☰	⋮
<input checked="" type="checkbox"/>	> 0000084892	MEADOWS OF GE	8 HILLSIDE DRIVE GENESEO, NY 14454	\$29,533.34	06/26/2020	HA	PAY	PM	☰	⋮
<input checked="" type="checkbox"/>	> 0000098672	HIGH POINT OF H.	100 HIGH POINT DRIVE HARTSDALE, NY 10530	\$3,047.39	06/04/2020	TE	PAY	PM	☰	⋮



On the account list view, to the left of your accounts you will see a checkbox. Click on one or more checkboxes and a dropdown named **Actions** will appear. Click on **Share Accounts**.

Role: Customer

Access Type: Sharee

Power Sharee

Read Only

Cancel Share

If you need additional assistance visit our [Help Center](#) for additional information on how to get in touch with us.

This will take you to the **Share Accounts** screen.

On the left you will see the selected accounts you will be applying the change to. Please note that if you do not have permissions to share certain accounts, it will not display on the left.

Fill out the email addresses in which you would like to share the selected accounts with. Make sure you separate the email addresses with a comma.

Next, select the Role for the accounts: either Customer or Partner.

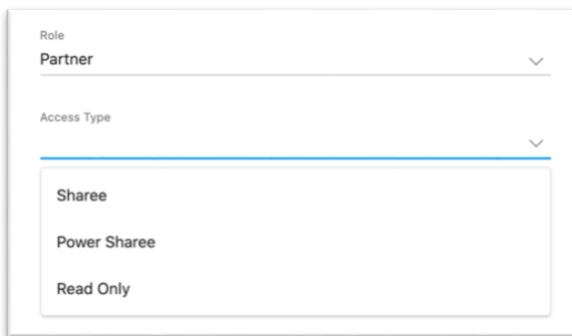
Select the access type you want them to receive.

- Sharee

With Sharee access, a user can view all information pertinent to the account, edit their user profile, pay bills, edit payment information, enroll in autopay & paperless billing, view account history, and generate reports.

- Power Sharee

With Power Sharee access, a user can perform all actions a **Sharee** can, but also can Share, Transfer, and Release Accounts.



Role
Partner

Access Type

- Sharee
- Power Sharee
- Read Only

- Read Only

With Read Only access, a user can view all information pertinent to the account, however, they are only able to edit their user profile.

After selecting the Role and Access Type, Click **Share**. A message is displayed that the account(s) have been shared.

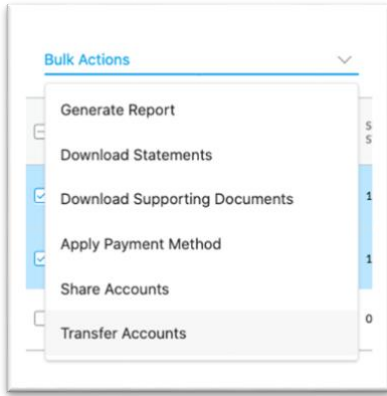
Bulk Transfer Accounts – Transfer Multiple Accounts at Once

This feature is if you would like to transfer the account from your view to another user.

On the account list view, to the left of your accounts you will see a checkbox. Click on one or more checkboxes and a dropdown named **Actions** will appear. Click on **Transfer Accounts**.



	BILLING ACCOUNT	NAME	BILLING ADDRESS	STATEMENT BALANCE	DUE BY	OWNER				
<input checked="" type="checkbox"/>	> 0000100107	10-63 JACKSON A	C/O: NEW BEDFORD MGMT PO BOX 34357 CHARLOTTE, NC 282344357	\$0.00	08/16/2020	TE	PAY	PM	...	
<input checked="" type="checkbox"/>	> 0000084892	MEADOWS OF GE	8 HILLSIDE DRIVE GENESEO, NY 14454	\$29,533.34	06/26/2020	HA	PAY	PM	...	
<input checked="" type="checkbox"/>	> 0000098672	HIGH POINT OF H.	100 HIGH POINT DRIVE HARTSDALE, NY 10530	\$3,047.39	06/04/2020	TE	PAY	PM	...	



In the dropdown menu, select **Transfer Accounts**. This will take you to the **Transfer Accounts** page.

Transfer Accounts

Enter the email addresses of the people you would like to transfer the accounts to. This will allow the users to access the same accounts with the selected role and access type.

Selected Accounts

0000096522

Email Addresses (separated by comma)

test@engie.com, test1@engie.com

Role

▼

Access Type

▼

Cancel
Transfer

On the left you will see a list of the **selected accounts** you will be applying the change to. Please note that if you do not have permissions to transfer certain accounts, it will not display on the left.

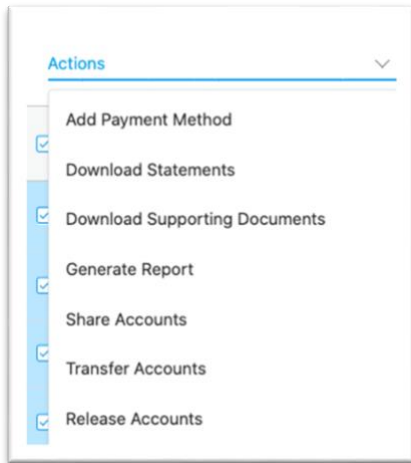
Fill out the email addresses in which you would like to transfer the selected accounts to. Make sure you separate the email addresses with a comma.

Next, select the role and access type you would like to transfer the account permissions as.

Bulk Release Accounts – Remove Multiple Accounts at Once

On the account list view, to the left of your accounts you will see a checkbox. Click on one or more checkboxes and a dropdown named **Actions** will appear. Click on **Release Accounts**.

Bulk Actions										
BILLING ACCOUNT	NAME	BILLING ADDRESS	STATEMENT BALANCE	DUE BY ↓	OWNER					
<input checked="" type="checkbox"/>	> 0000100107	10-63 JACKSON A	C/O: NEW BEDFORD MGMT PO BOX 34357 CHARLOTTE, NC 282344357	\$0.00	08/16/2020	TE	PAY	PDF	☰	⋮
<input checked="" type="checkbox"/>	> 0000084892	MEADOWS OF GE	8 HILLSIDE DRIVE GENESEO, NY 14454	\$29,533.34	06/26/2020	HA	PAY	PDF	☰	⋮
<input checked="" type="checkbox"/>	> 0000098672	HIGH POINT OF H	100 HIGH POINT DRIVE HARTSDALE, NY 10530	\$3,047.39	06/04/2020	TE	↻ PAY	PDF	☰	⋮



This will take you to the **Release Accounts** screen where the accounts you selected will display. Please note: if you do not have permissions to release an account, it will not display here. Once you click **Release**, those accounts will be removed from your user profile. Also, If you are the account owner and the account is an active account with a balance, you will not be able to release the account.

