MY ENGIE PORTAL GUIDE

For Customers

Updated October 29,, 2020

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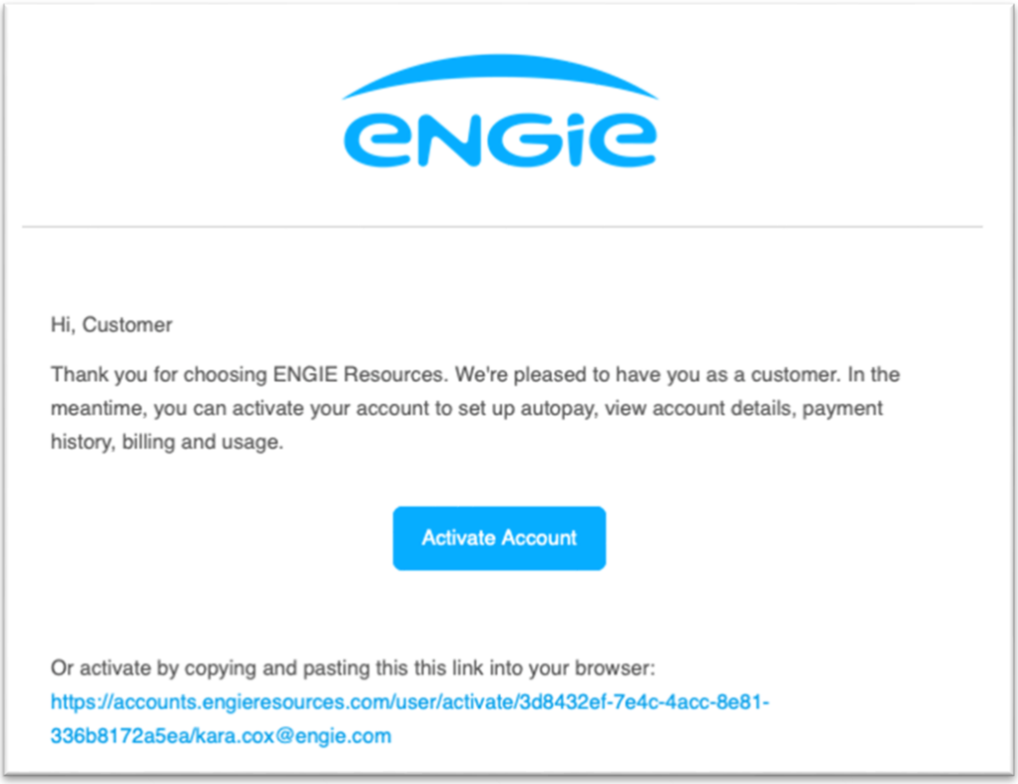
Overview

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



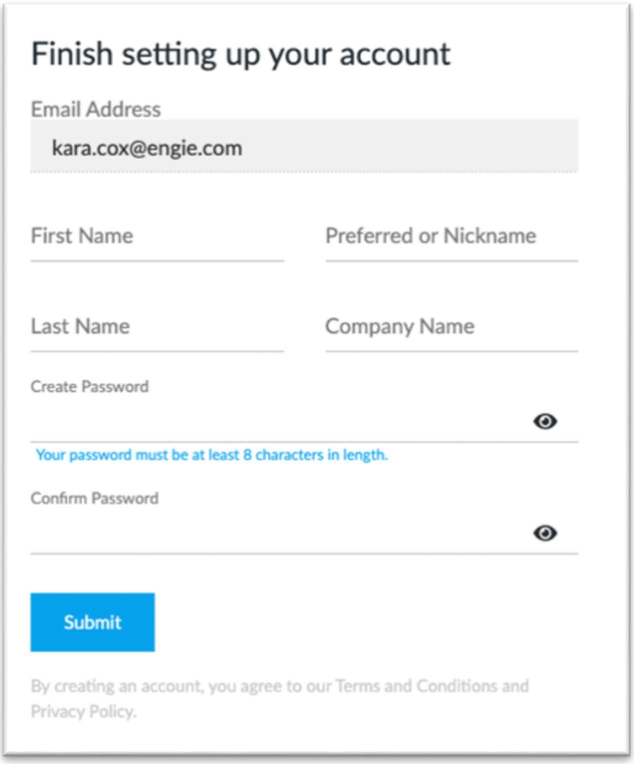
Hi, Customer

Thank you for choosing ENGIE Resources. We're pleased to have you as a customer. In the meantime, you can activate your account to set up autopay, view account details, payment history, billing and usage.

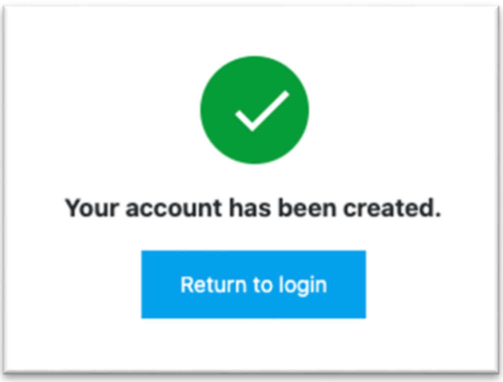
Activate Account

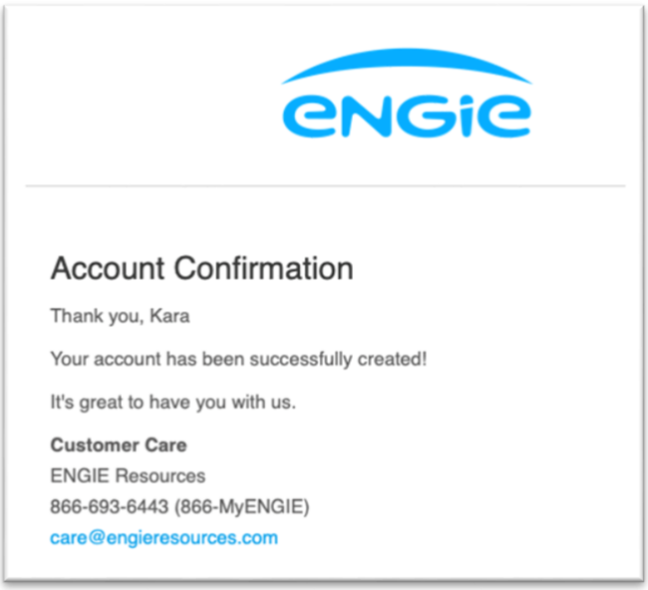
Or activate by copying and pasting this this link into your browser:
https://accounts.engieresources.com/user/activate/3d8432ef-7e4c-4acc-8e81-336b8172a5ea/kara.cox@engie.com

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.



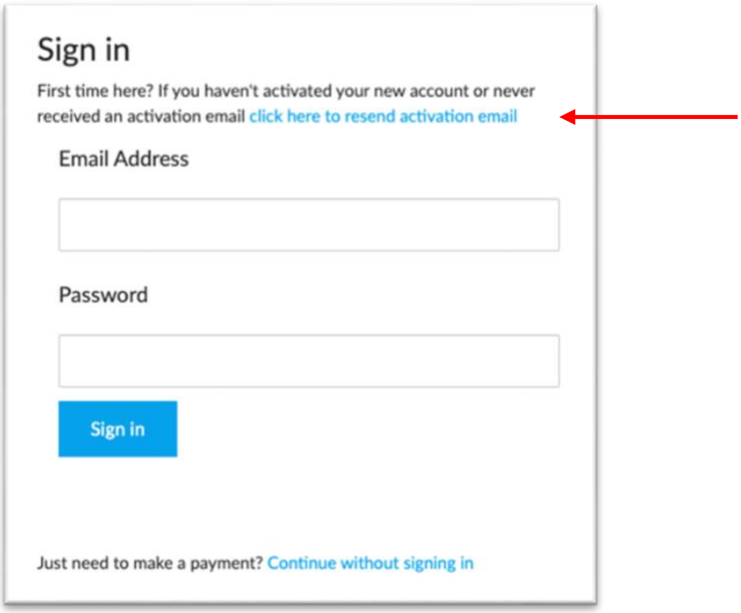
Once the user clicks “submit” they will receive a confirmation modal as well as an email to their inbox confirming their account has been created.





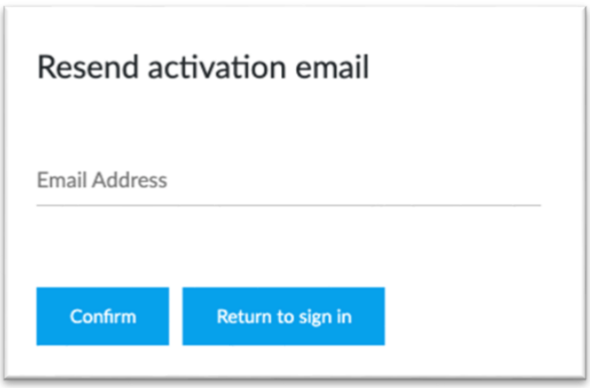
Didn’t receive an activation email?

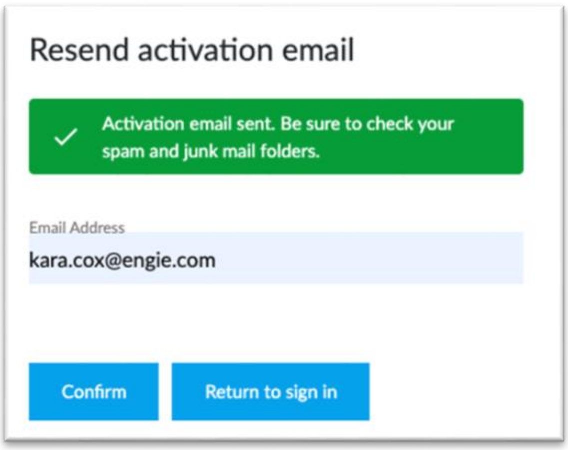
If you never received an activation email, please check your Spam/Junk folder first. If you are still having trouble you can resend the activation to yourself by clicking the link labelled **click here to resend activation email**.



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

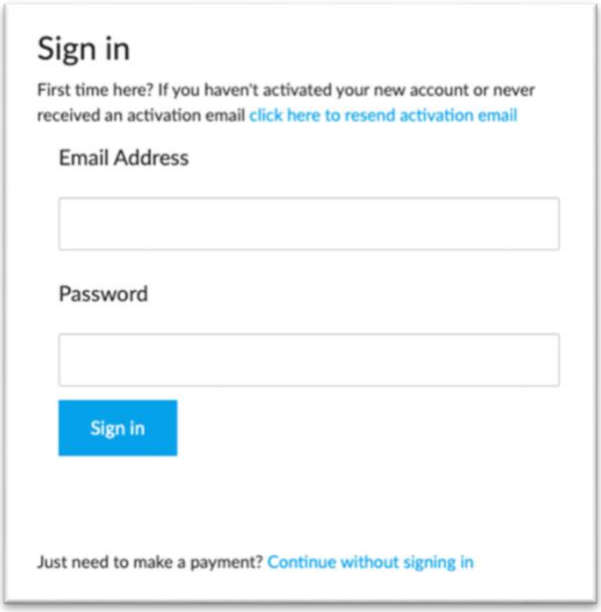
*Note: Please make sure to enter the correct email address that was used for your original account registration *



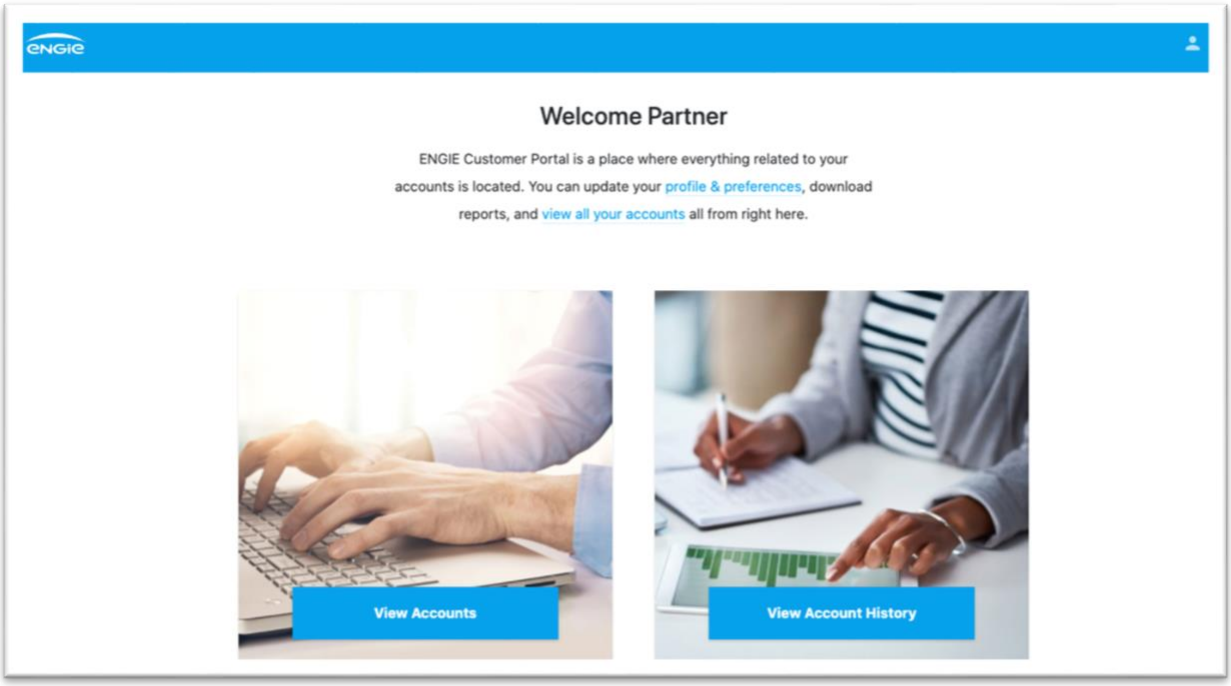


Logging In

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



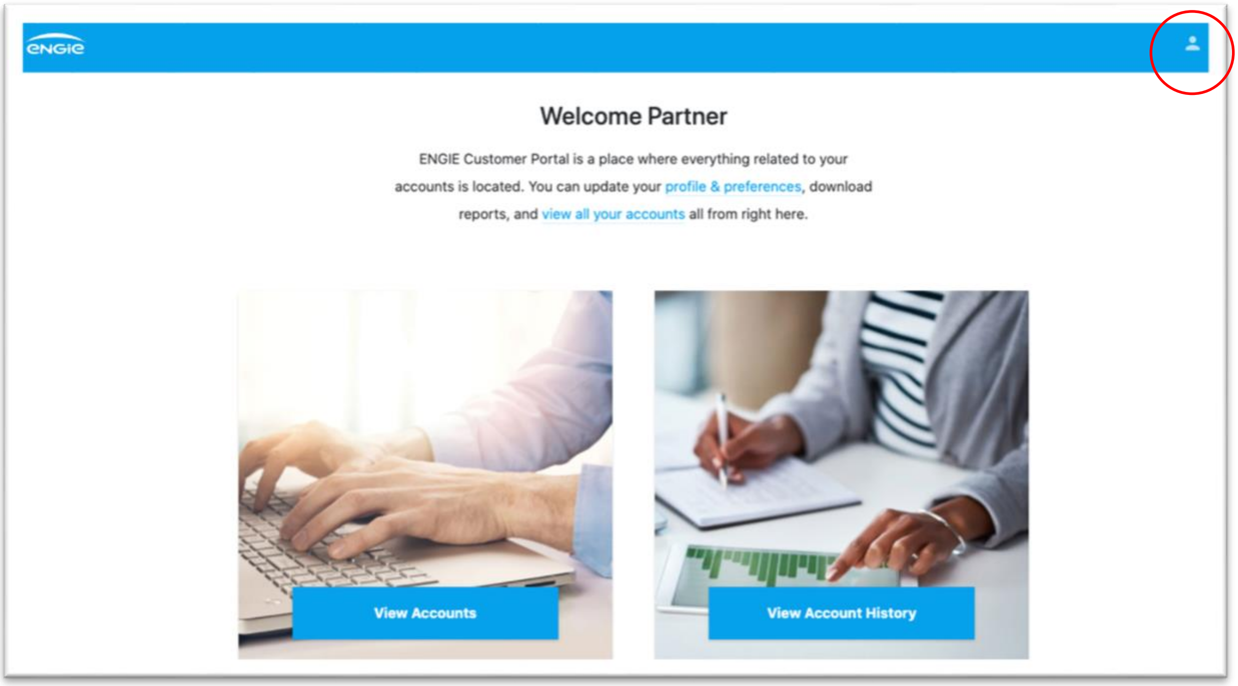
Profile & Preferences

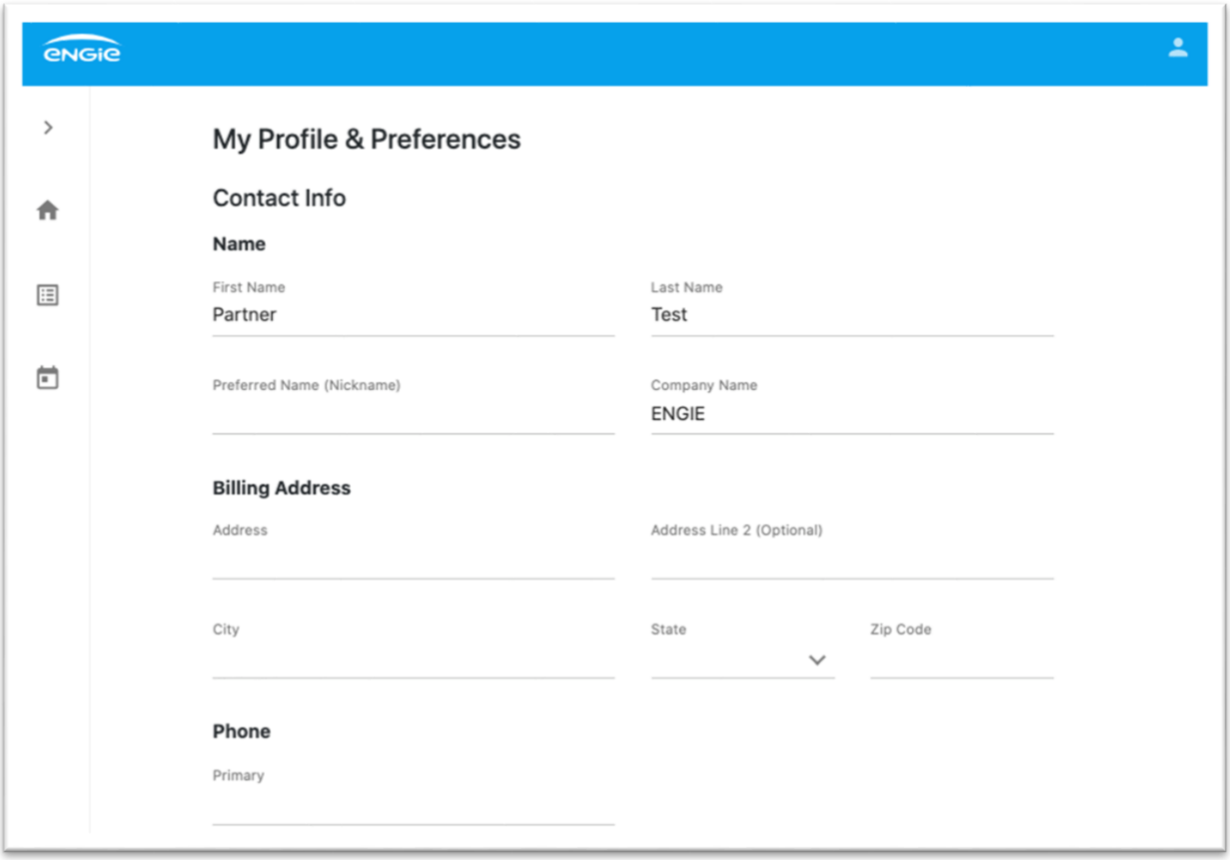
Add/Edit Contact Info: Name, Company, Billing Address, Phone Number

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.

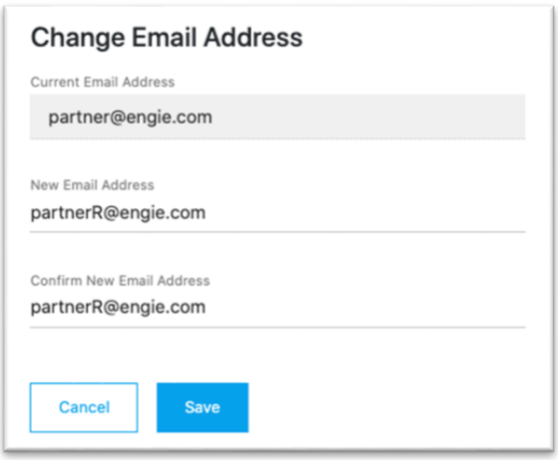




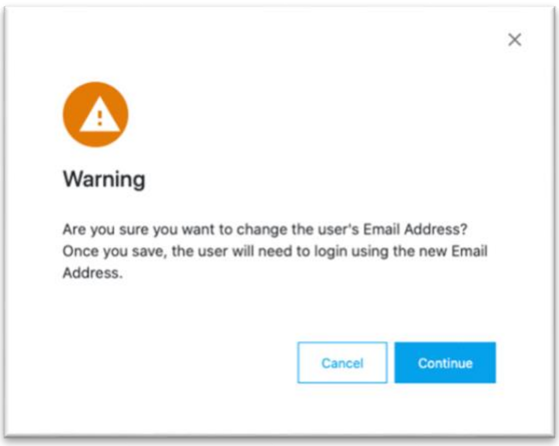
My Profile & Preferences
Contact Info
Name
First Name
Partner
Last Name
Test
Preferred Name (Nickname)
Company Name
ENGIE
Billing Address
Address
Address Line 2 (Optional)
City
State
Zip Code
Phone
Primary

Changing Email Address

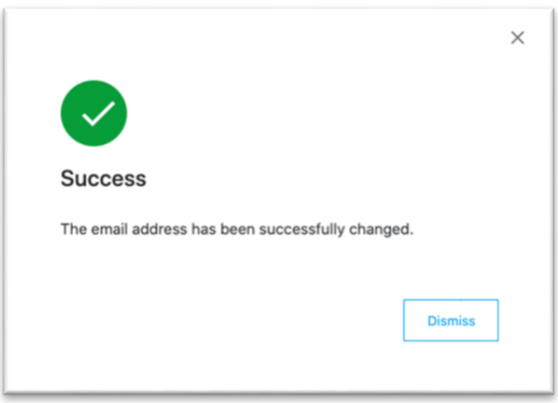
The second section on the **profile & preferences** page is **Sign in and Security**. Click on the link labelled **Change Email Address**.



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**.



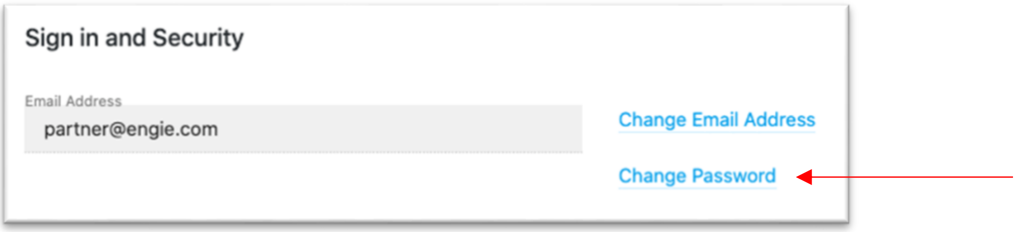
A warning message is displayed to have you confirm that you want to change your email associated with your online portal login. Click **Continue**.



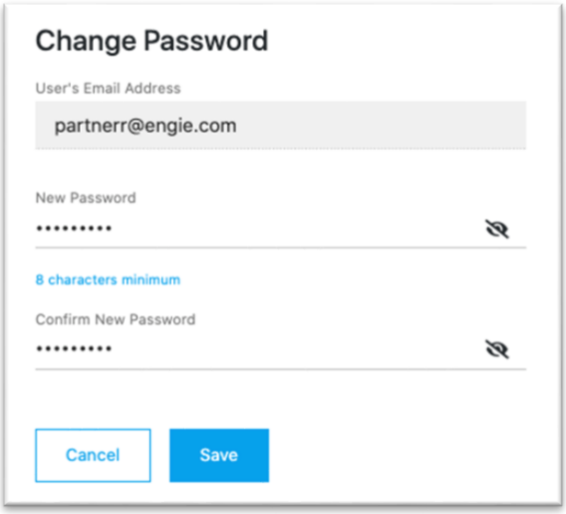
A success message is displayed. Once you click **dismiss**, it will take you back to the profile & preferences page where your email is updated.

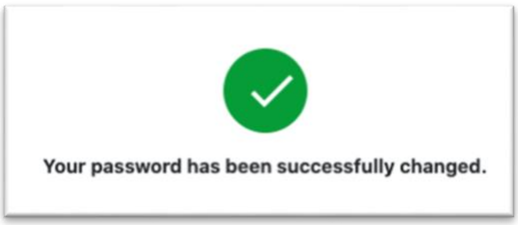
Changing Password

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



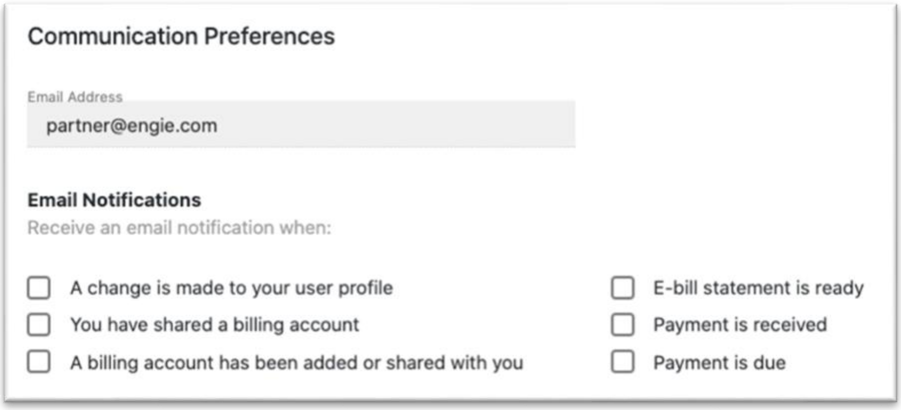
Your current email address will be displayed and disabled. Enter and confirm your new password for the account. Click **Save** to continue. A confirmation pop up will appear.





Set up Communication Preferences/Email Notifications

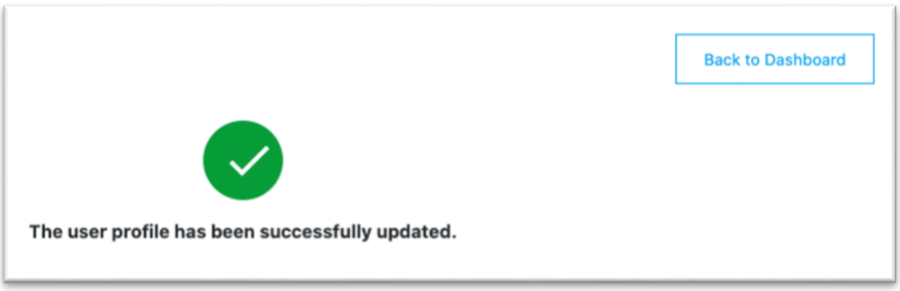
The third and last section on the **profile & preferences** page is **Communication Preferences**.



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

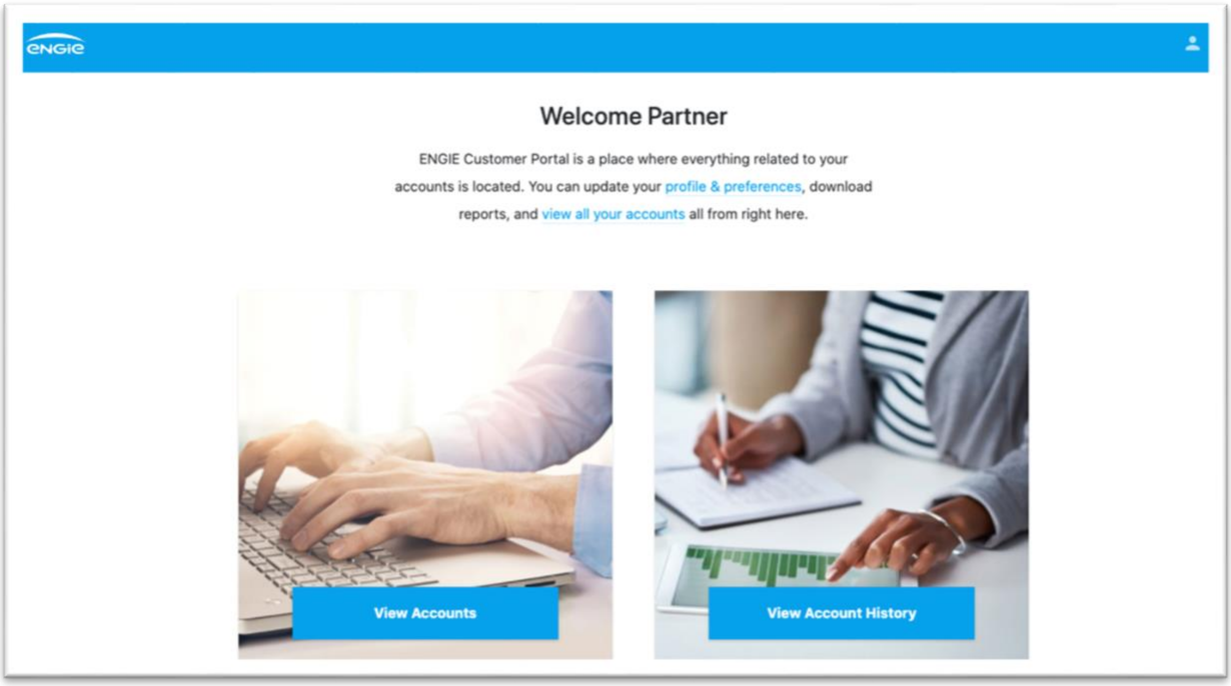
By selecting to receive this email notification, the email will only notify you that a statement is ready to view within the portal. This is not allowing you to receive a copy of the statement in the attachment of the email. If you would like to enroll in paperless billing to receive a PDF copy of your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



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

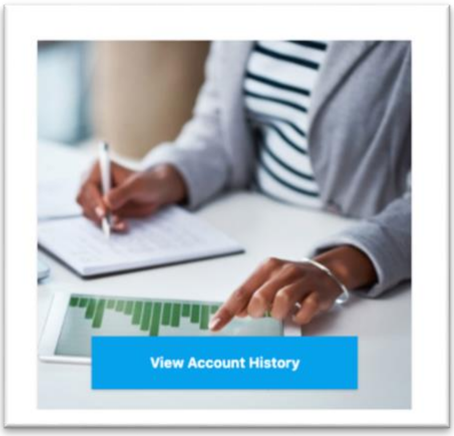
Dashboard Landing Page

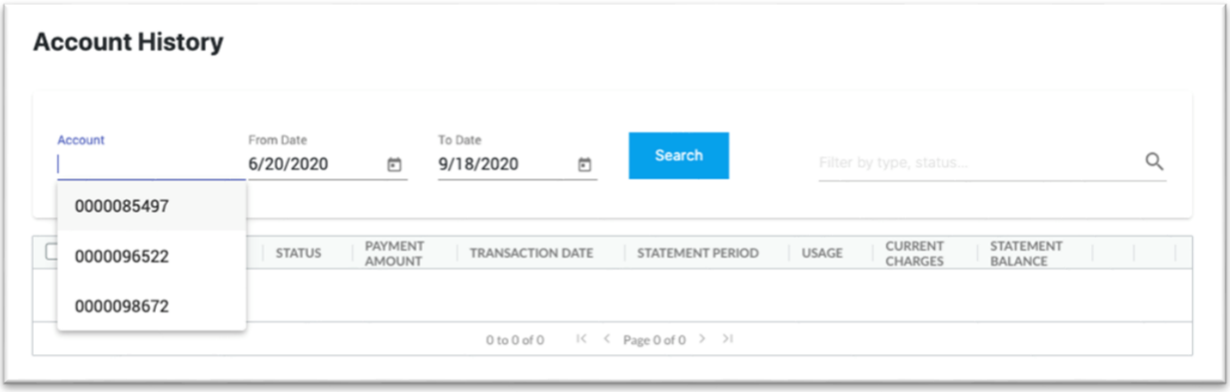
Below is the landing page you will see when you sign in. This will allow you to view your accounts or account history for your accounts.



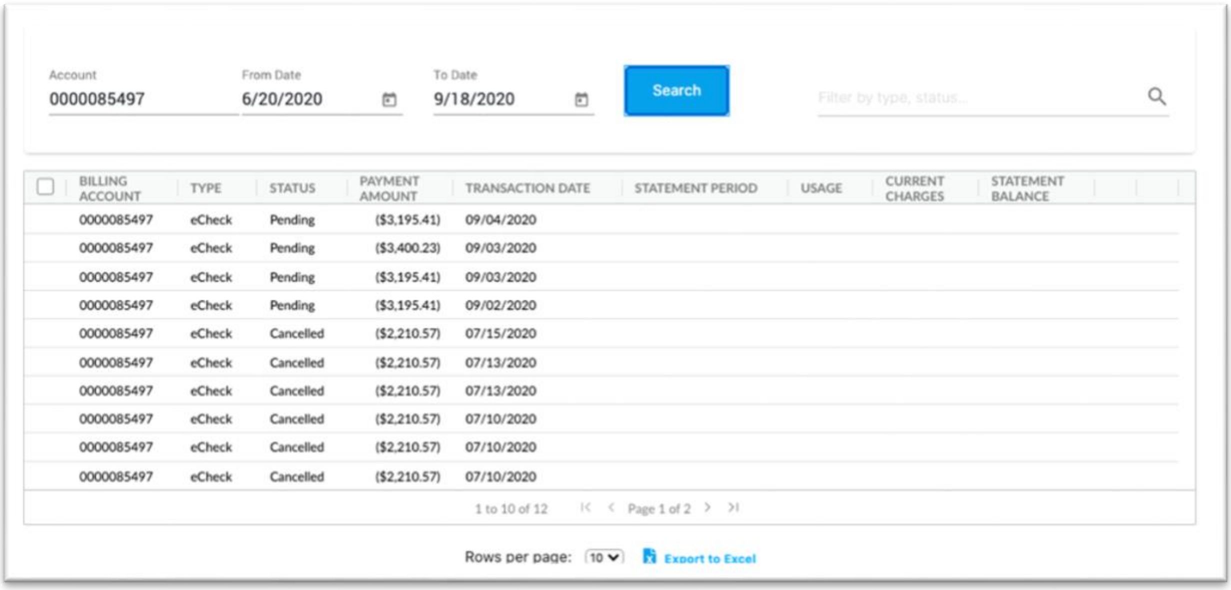
View Account History

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





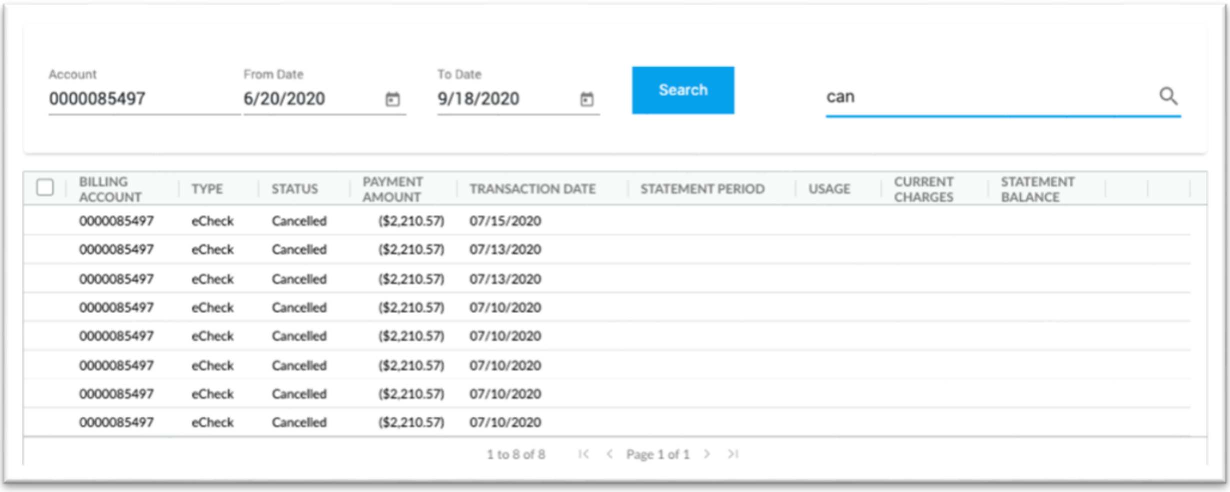
First select the account from the dropdown you would like to see the history of. You can then select the date range and press **Search**. This will then display all of your previous activity specific to the account you selected.



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				

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

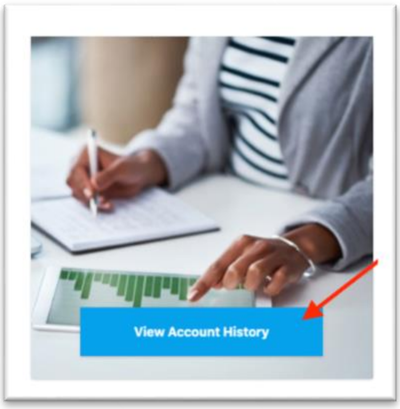
BILLING ACCOUNT	TYPE	STATUS	PAYMENT AMOUNT	TRANSACTION DATE	STATEMENT PERIOD	USAGE	CURRENT CHARGES	STATEMENT BALANCE
0000085497	eCheck	Cancelled	($2,210.57)	07/15/2020				
0000085497	eCheck	Cancelled	($2,210.57)	07/13/2020				
0000085497	eCheck	Cancelled	($2,210.57)	07/13/2020				
0000085497	eCheck	Cancelled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

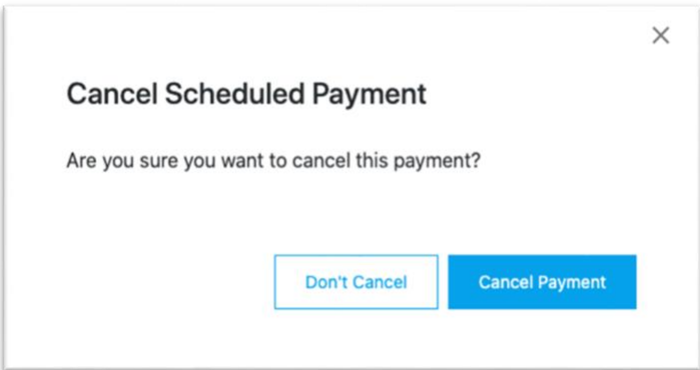
Note- a payment can only be cancelled if the status is 'pending'

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

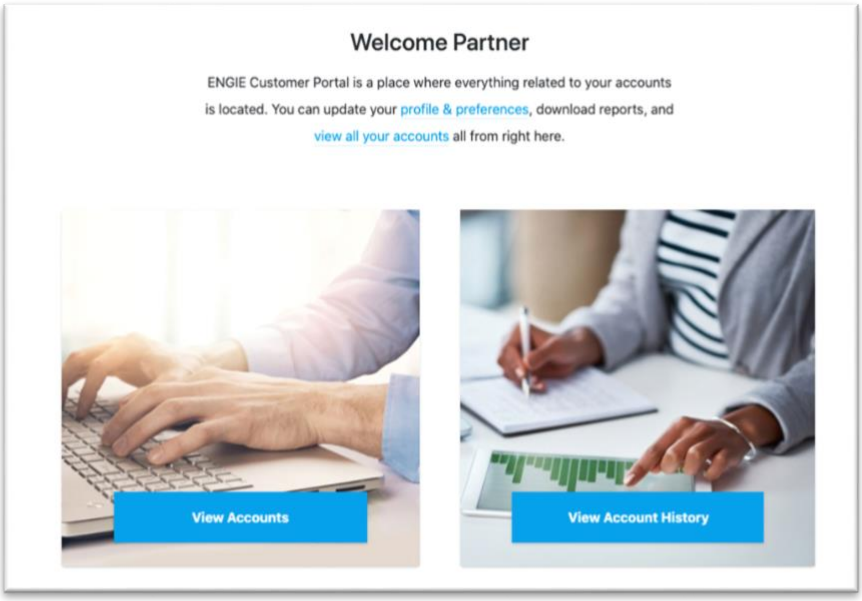


Locate the payment in the table. Click on the **blue 'x' icon** next so the **scheduled** payment

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



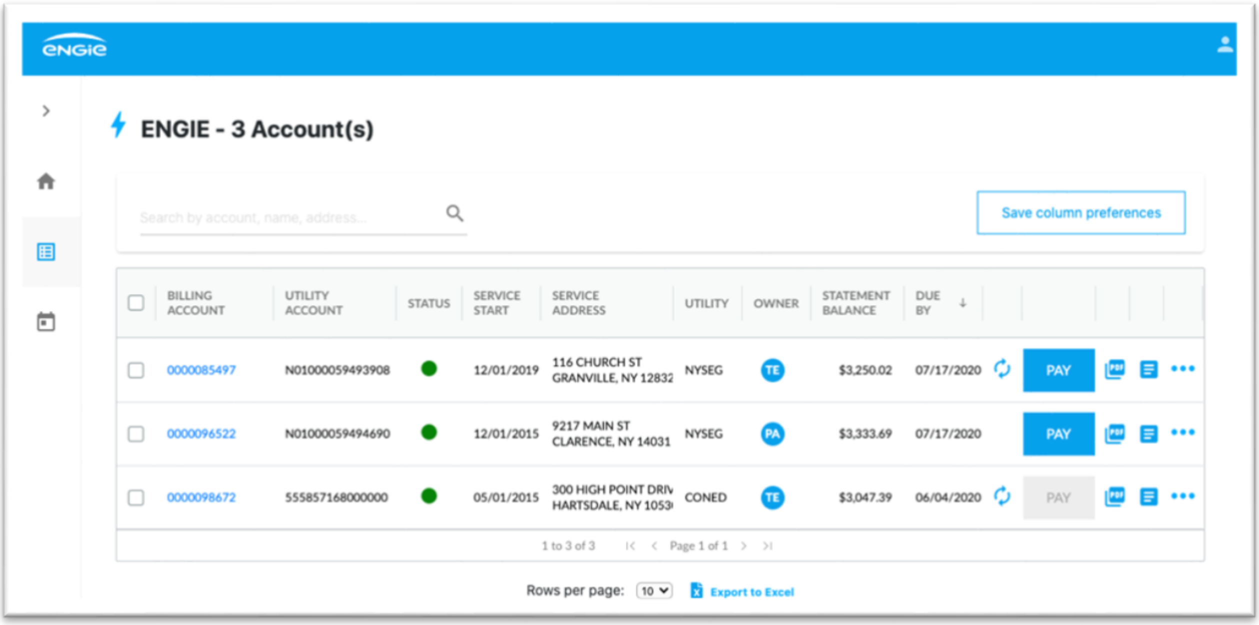
View Your Account(s) (3 Scenarios)



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.

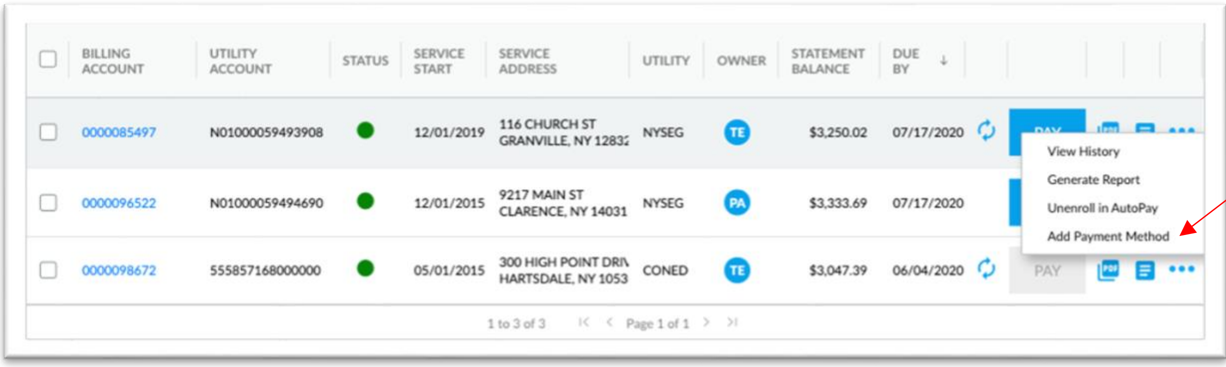
View Your Account(s) - Scenario 1: Account List View

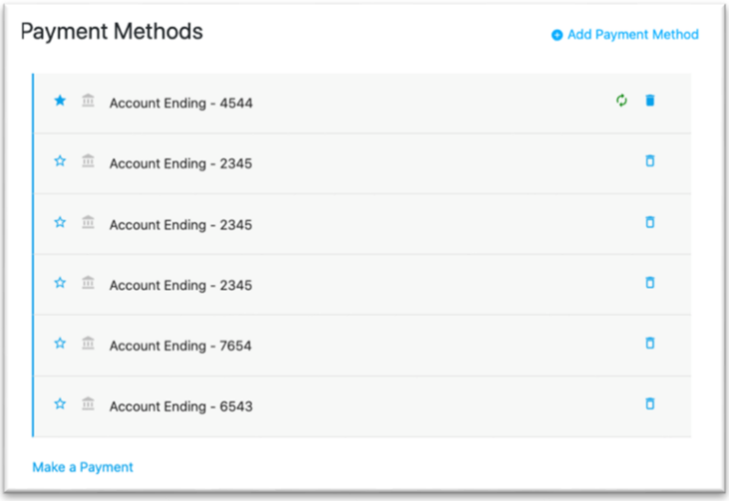
This view is when a user is associated with multiple billing accounts.



Add/Delete a Payment Method

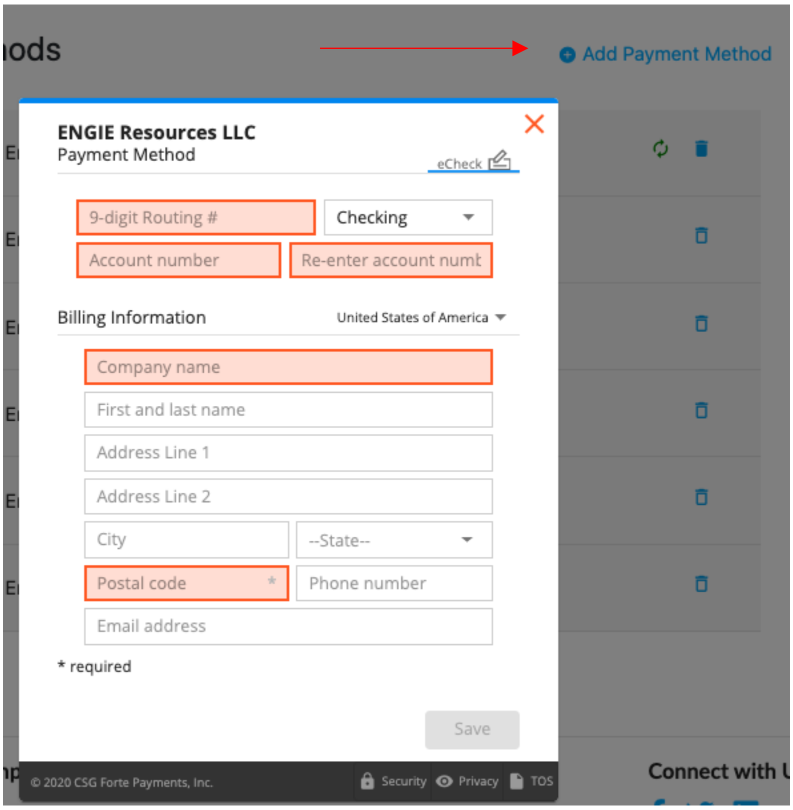
From your account list view, click on the three blue horizontal dots to display more options. Click on the **Add Payment Method** option.





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

Add Payment Method



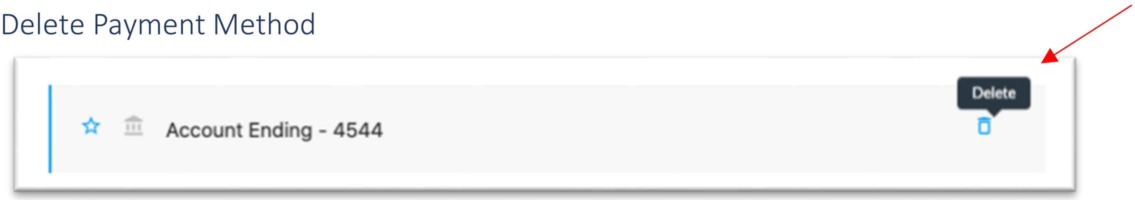
At the top right of the page there will be a **Add Payment Method** link.

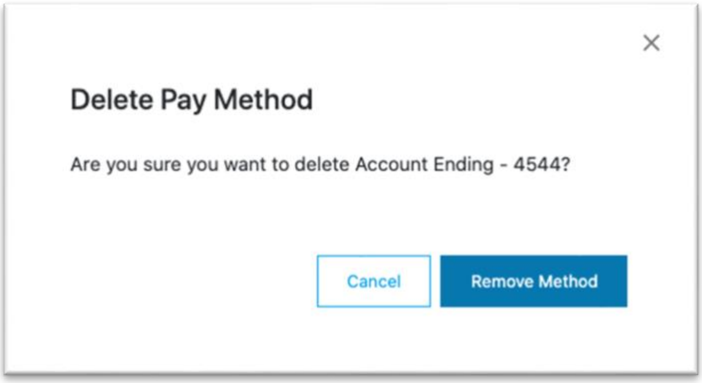
Select this to be taken to a pop up that will have you enter in payment information. Please note at this time payments can only be made from a checking or savings account.

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

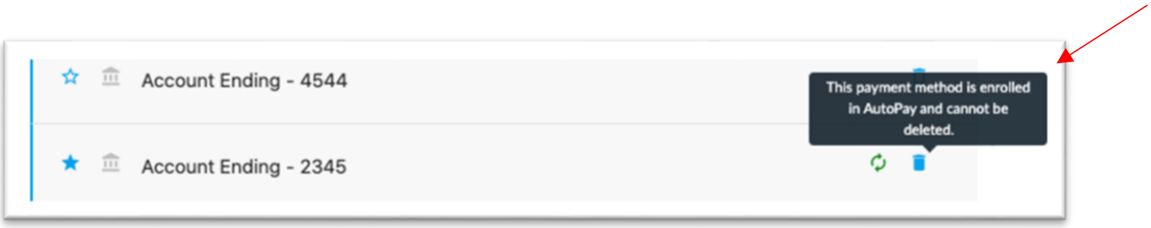
Click **Save**, and you will see a confirmation message that your payment method has been added.

Delete Payment Method





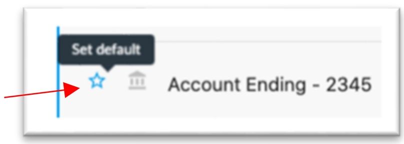
If you no longer need a payment method, you can remove it from the list. Click on the trash can icon to the right of the payment method to delete it. A pop up will appear asking you to confirm you want to delete the payment method. Click **Remove Method** to continue. The payment method will then be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

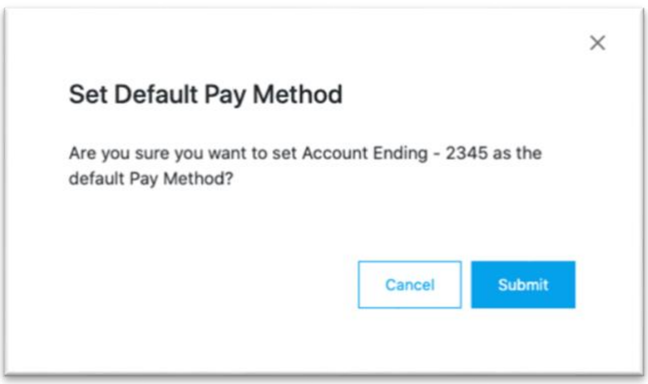


Please note that a payment **cannot** be deleted if it is the payment method that is enrolled in AutoPay. AutoPay is always tied to the default payment method. If you do want to delete a payment method that is associated with AutoPay, change the default payment method and it will tie AutoPay with that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

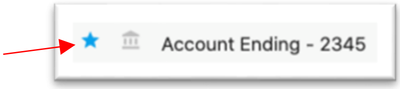
Default Payment Method

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





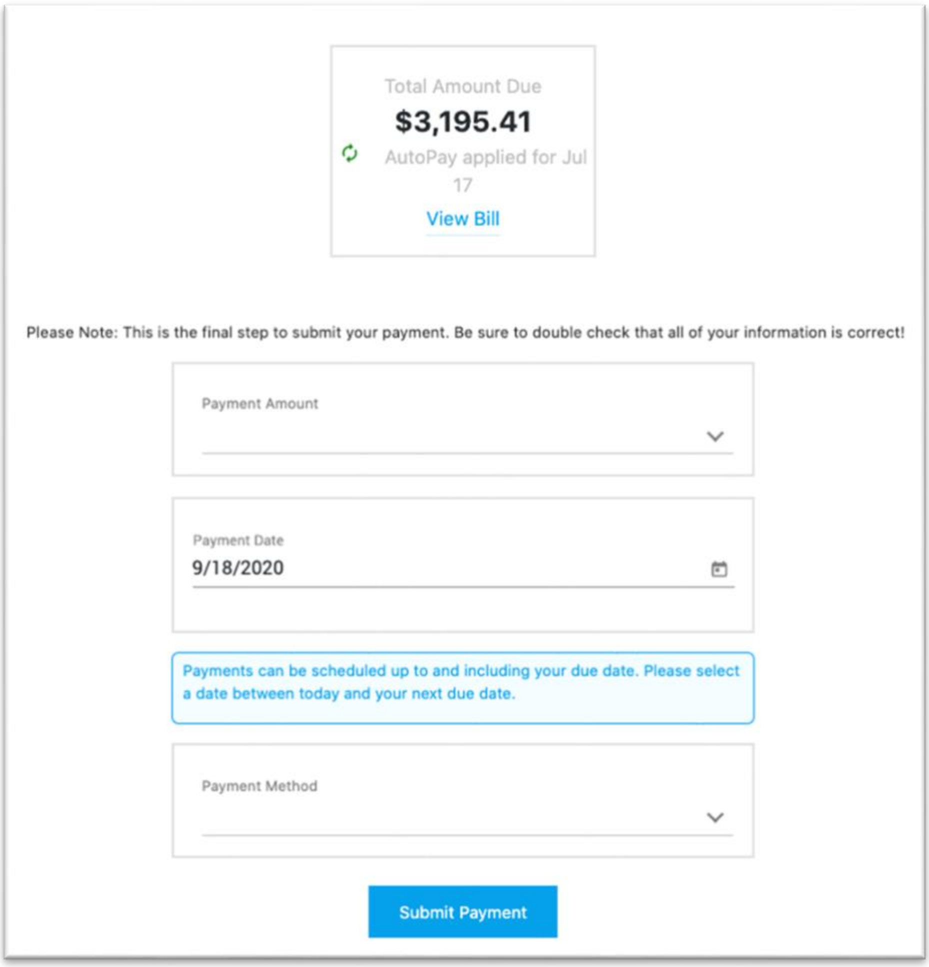
A pop up will appear, asking you to confirm you want to set it as the default pay method. Select **Submit** to continue. A blue star icon will now appear next to the new default pay method.

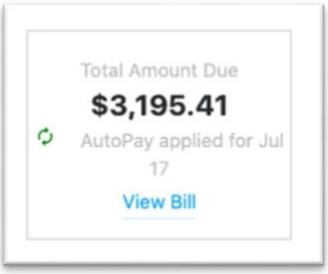


Make a Payment

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

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.



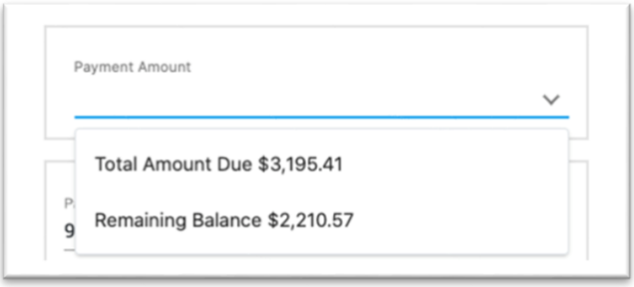


The top section will show your total amount due and if it is enrolled in AutoPay, a message will appear here to indicate that. You can still proceed even though you are enrolled in AutoPay if you want to make a one-time payment.

View Bill

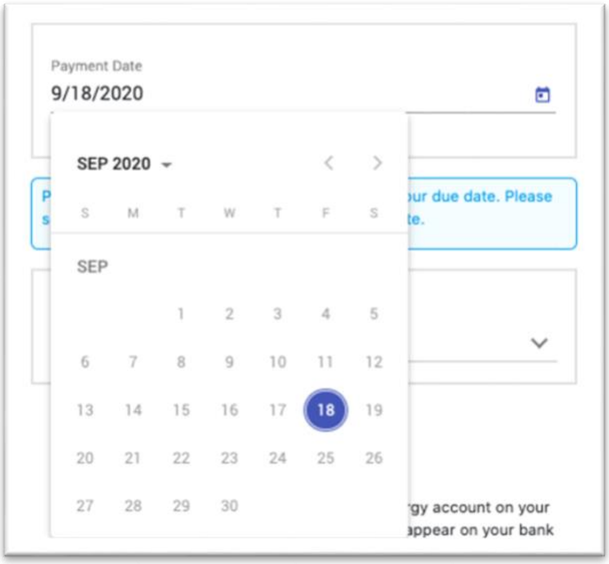
You can also view your bill you are paying on here. This will open up a PDF of the statement.

Payment Amount



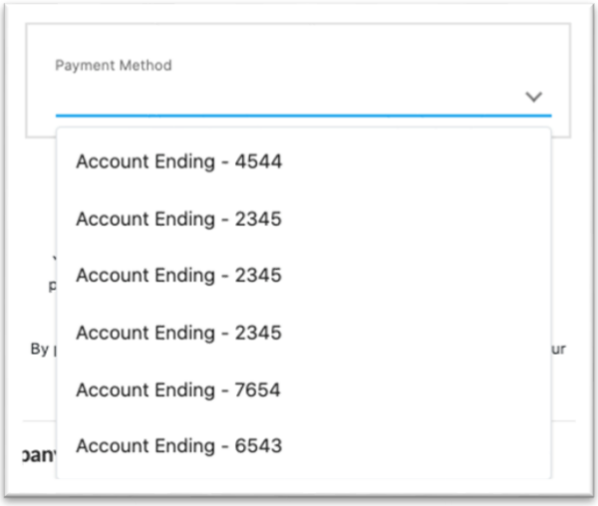
When clicking on the caret (down arrow), you will see the total amount due and the remaining balance.

Payment Date



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

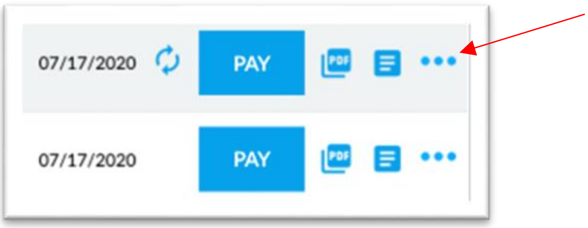
Payment Method



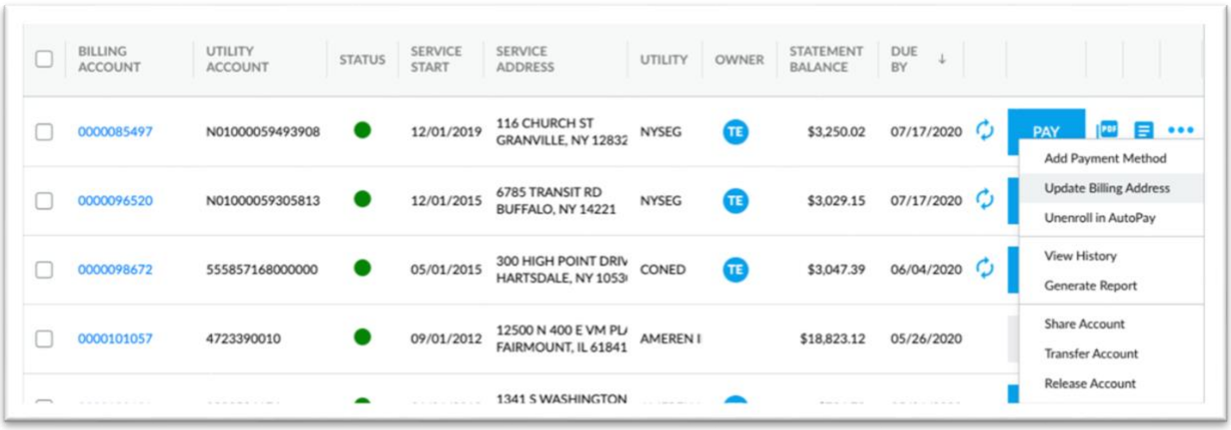
When clicking on the caret (down arrow), you will see all of your payment methods that have been added. Click on the payment method you would like to use, then click the **submit payment** button. You will receive a confirmation message saying that your payment has been made.

Update Billing Address

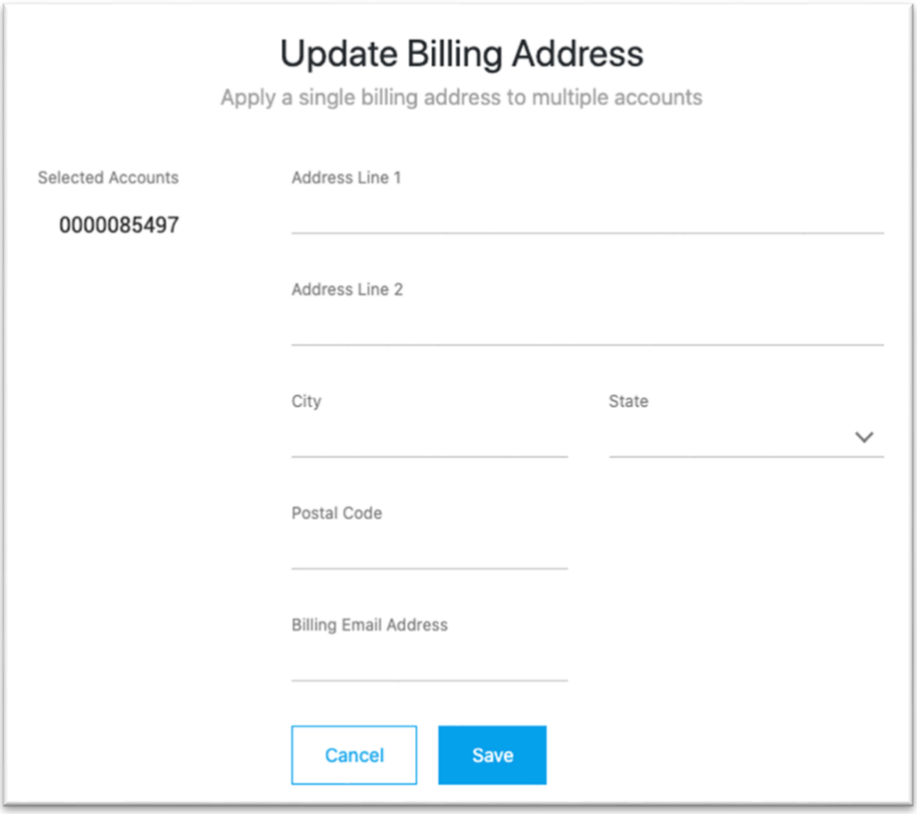
From your account list view, click on the additional options icon on the right side of the account you would like to update.



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

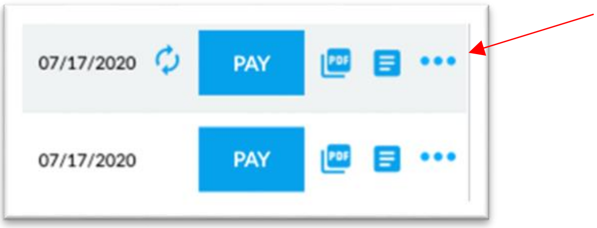


This will take you to **Update Billing Address** screen where you can update information here and click **save**.

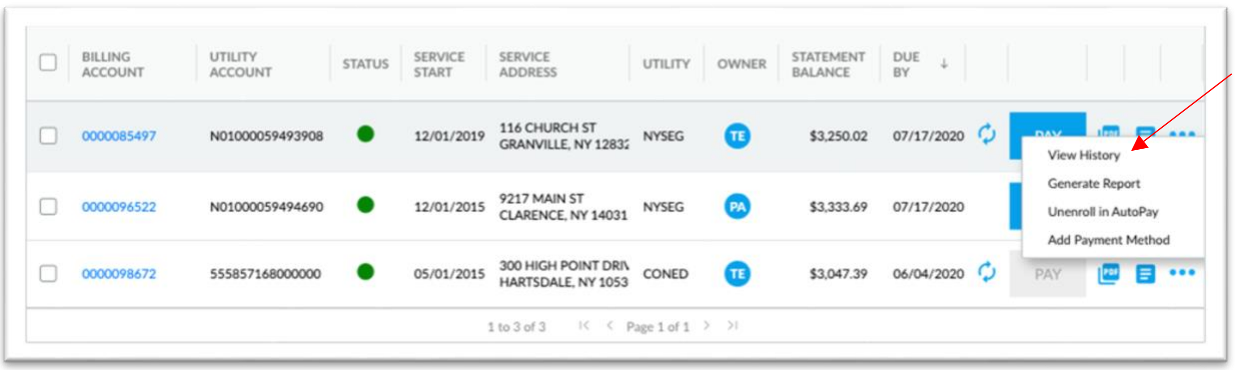


View Account History

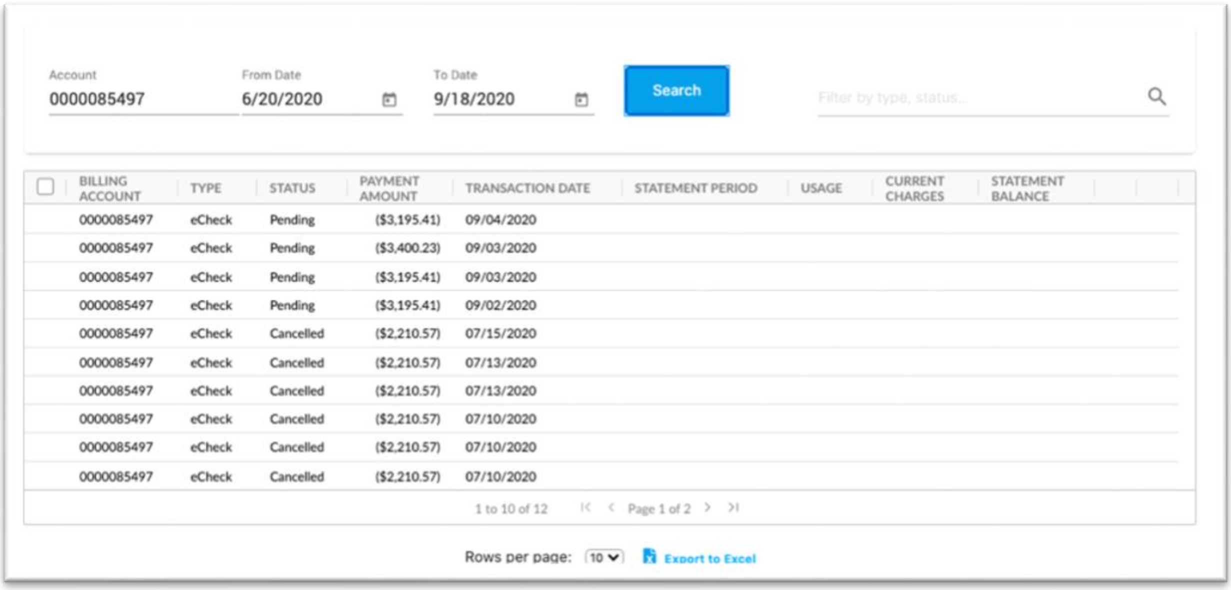
From your account list view, click on the three blue horizontal dots to display more options.



Click on the **View History** option.

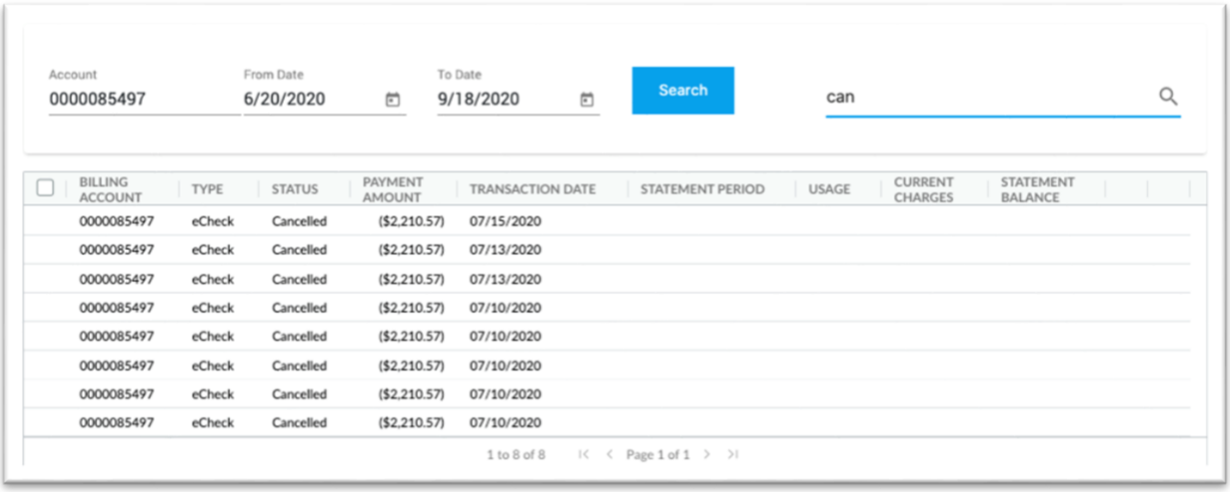


The account will default to the account you are on. You can then select the date range and press **Search**. This will then display all of your previous activity specific to the account you selected.



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.

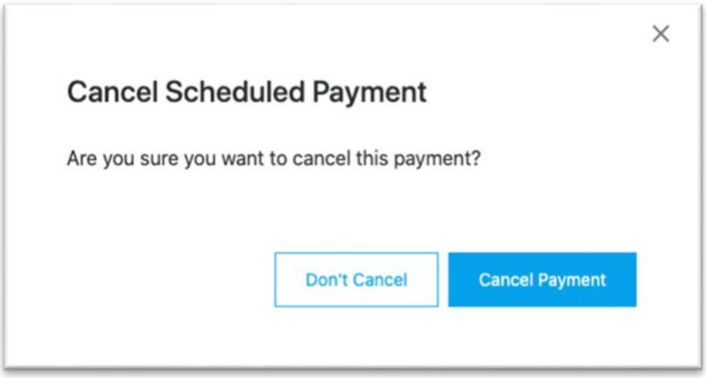


Cancel a Pending Payment

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

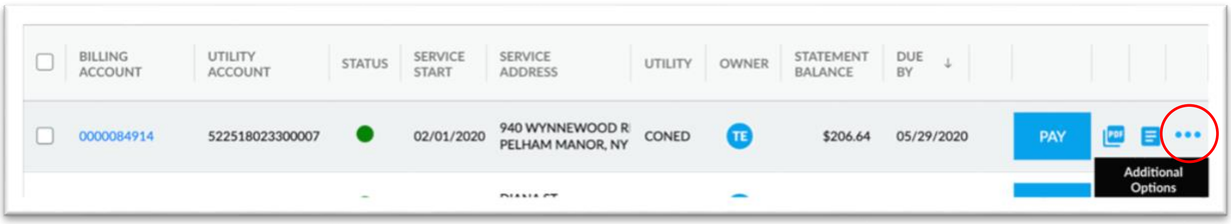
A confirmation modal appears. Click **Cancel Payment** to continue.



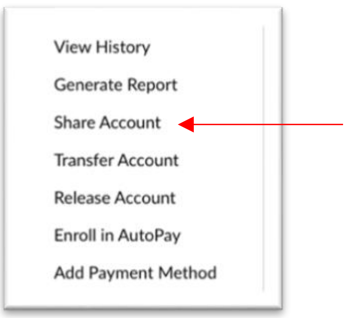
Share Account(s)

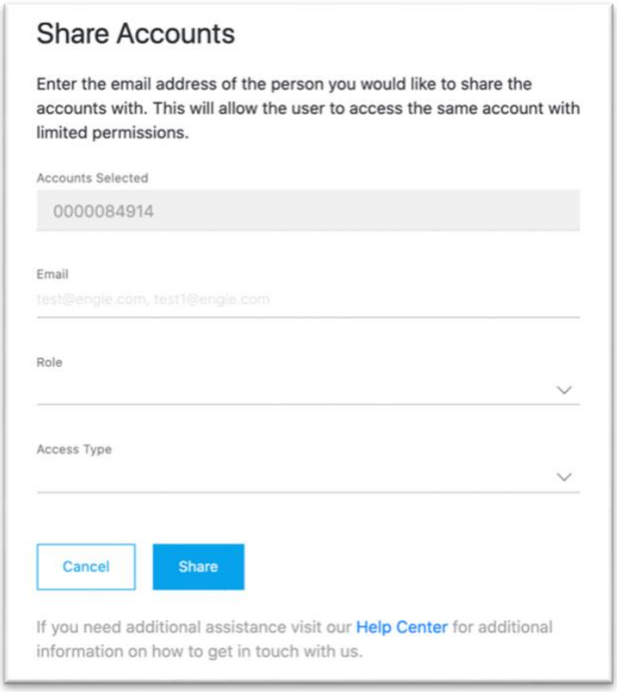
User this feature if you would like to share an account to another email/user and also have it on your account list view to access.

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



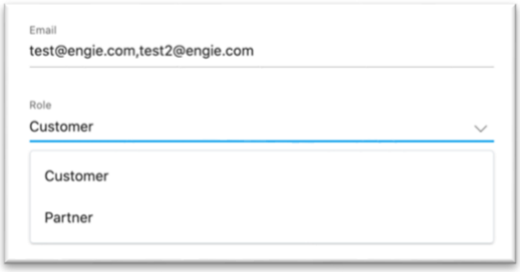
Select **Share Account** from the menu options.



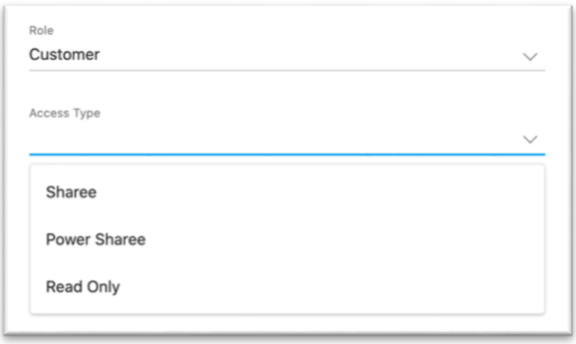


The **Share Accounts** screen will appear where you can enter one or more email address in which you want to share the specified account with.

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

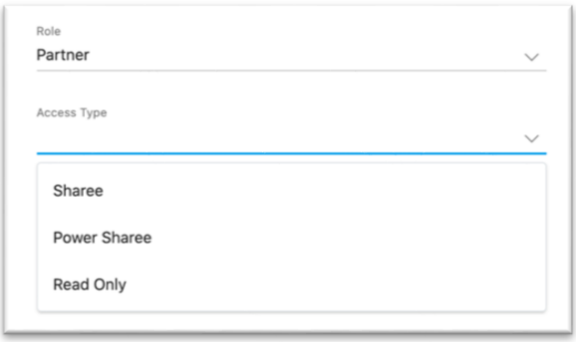


There are three different **Access Types** associated with both **Customer/Partner** Roles. Select the access type you would like the email to have permissions for.



- 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.



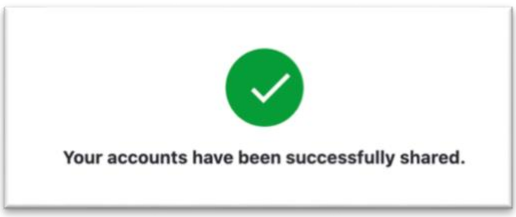
- Power Sharee

*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.

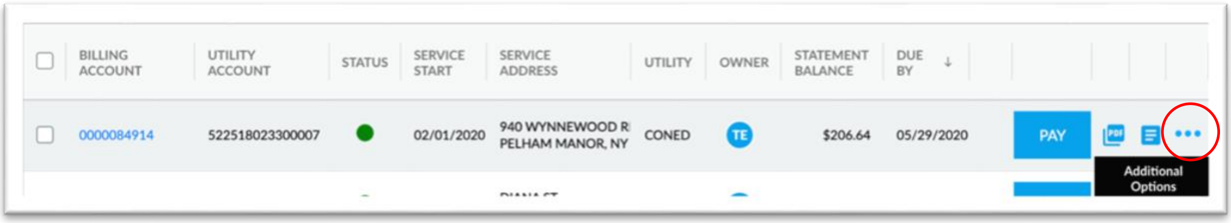
After selecting the Role and Access Type, Click **Share**. A message is displayed that the account(s) have been shared.

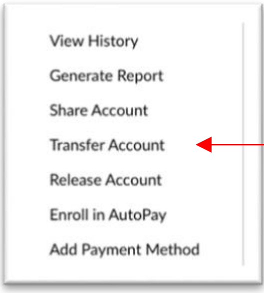


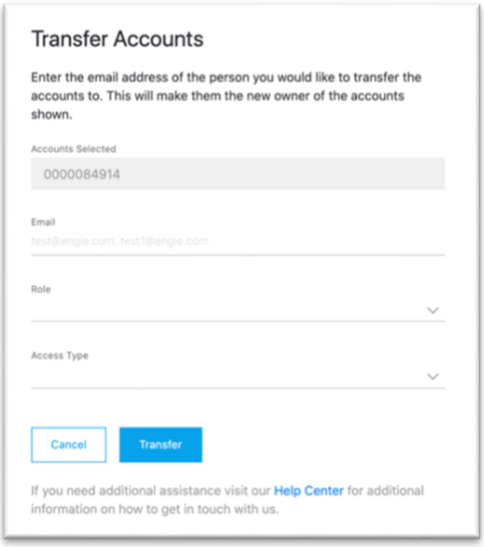
Transfer Account(s)

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







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

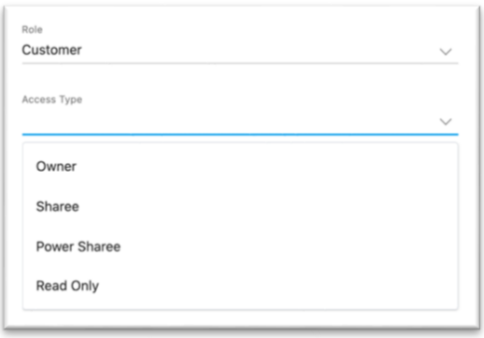
Under the **Role** dropdown, select **customer**. Under the **Access Type** dropdown there are 4 options to choose from.

- 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.*

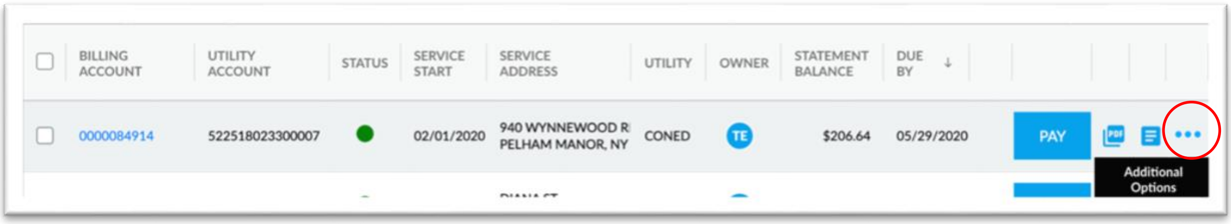
- Read Only
  With Read Only access, a user can view all information pertinent to the account, however, they are only able to edit their user profile.

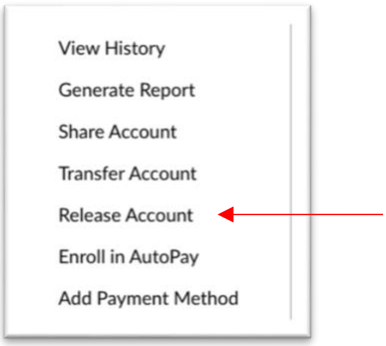
Once you have selected an **Access Type**, click **Transfer**. You will receive a success message.

Release Account(s)

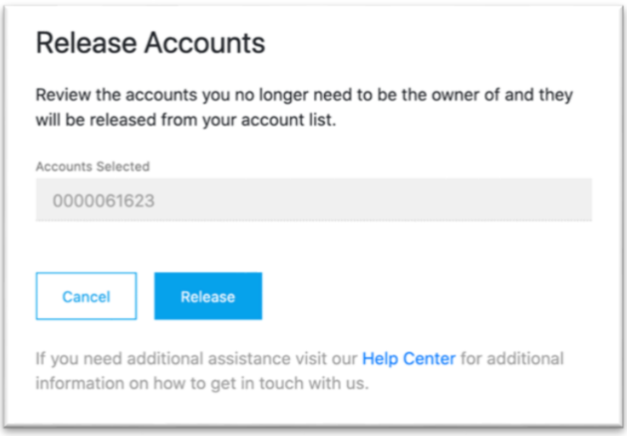
User this feature if you no longer need to be the owner of an account, and the account(s) will be released from your account list.

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



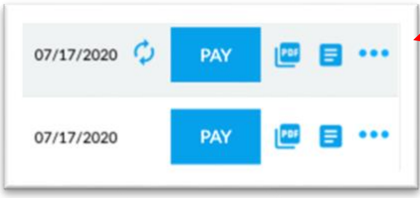


Click on **Release Account**. A new page will appear that shows the account(s) you would like to release. Click **Release** to continue. If the account has a status=dropped as well as zero balance your request will be successful and the account will be removed from your account list view.

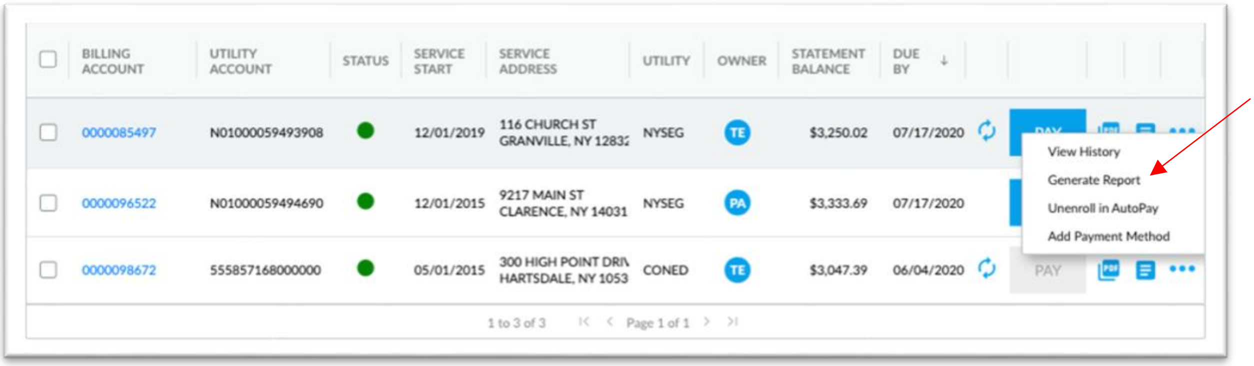


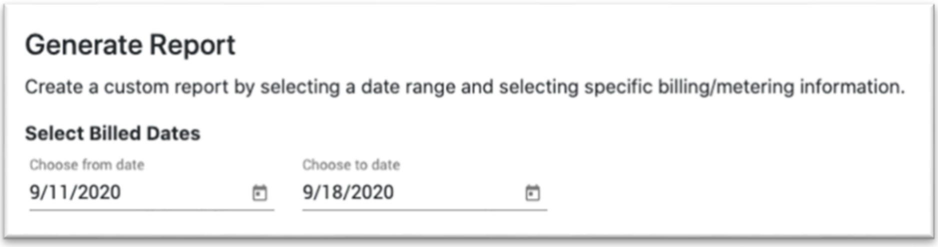
Generate Report

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

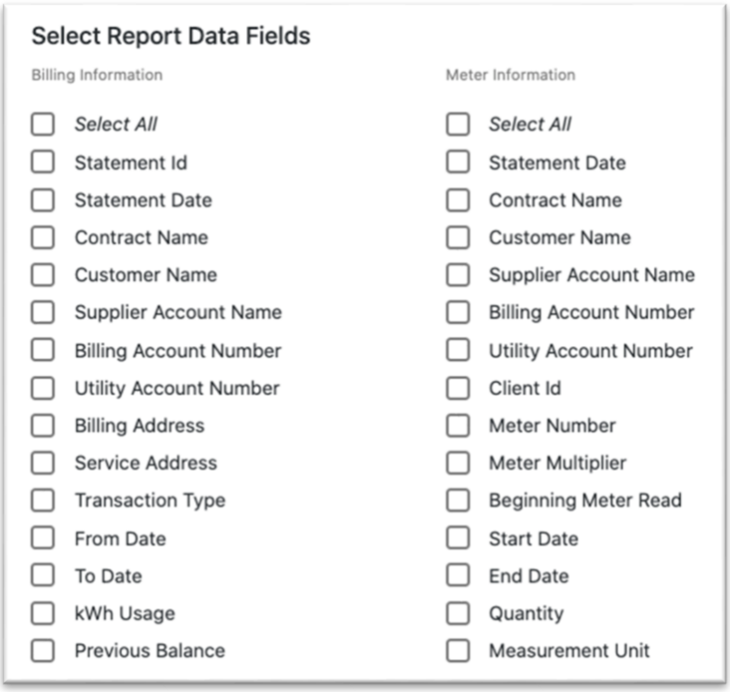


Click on the **Generate Report** option.



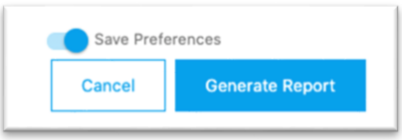


The **Generate Report** page displays a date range for the report. The page will default to the *To* billed date and the *From* billed date.



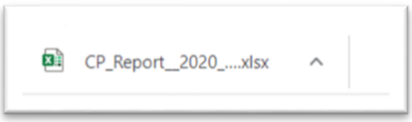
The page will display fields under two columns/sections: **Billing** and **Meter** information.

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

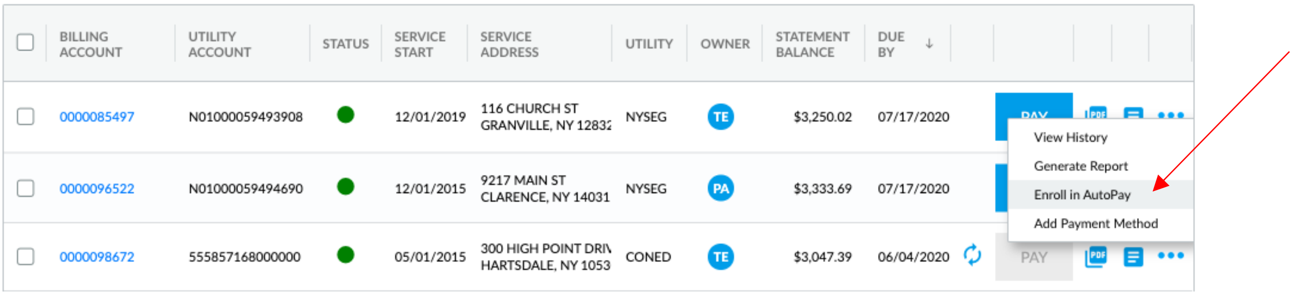
Customer Name	Supplier Account Number	Utility Account Number
VALGREEN CO.	1837773	N01000059493908
VALGREEN CO.	1837773	N01000059493908
VALGREEN CO.	1837773	N01000059493908
VALGREEN CO.	1837773	N01000059493908
VALGREEN CO.	1837773	N01000059493908
VALGREEN CO.	1837773	N01000059493908

Billing Meter

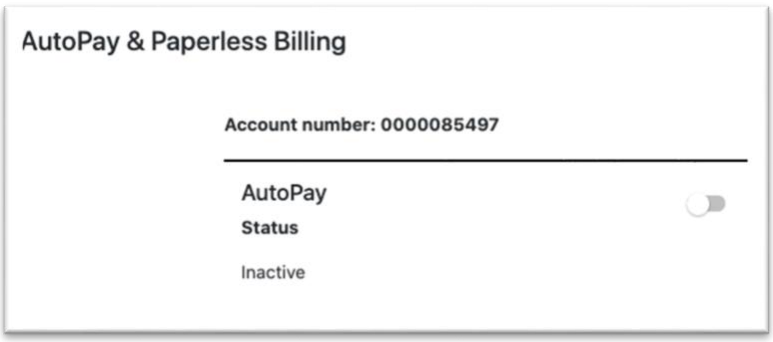
Billing Meter

Enroll in AutoPay

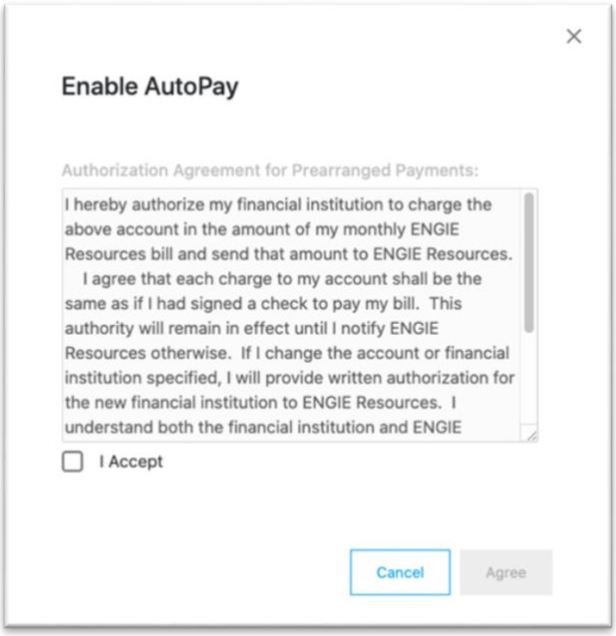
When you are on your account list view, click on the three horizontal blue dots at the right of the account you wish to enroll in AutoPay. If an account is enrolled in AutoPay, there will be a blue icon stating it is enrolled.



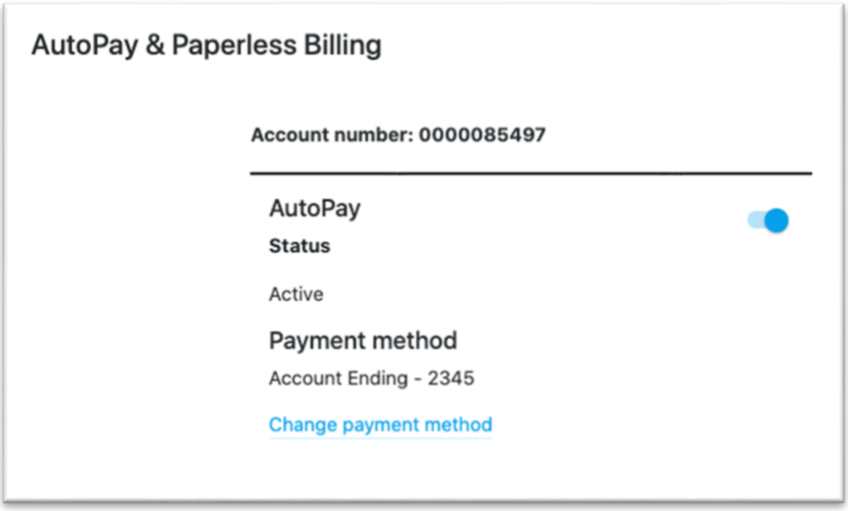
Click the option **Enroll in AutoPay**. This will take you to the **AutoPay & Paperless Billing** page for that specific account.



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.



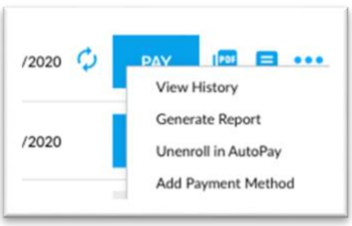
The toggle is now on and active with the default payment method used.



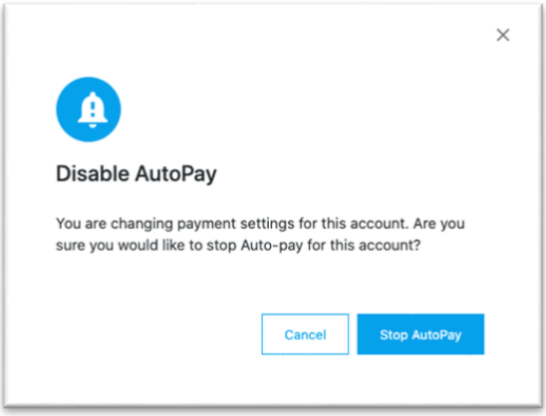
Un-Enroll in AutoPay

When you are on your account list view, click on the three horizonal 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.



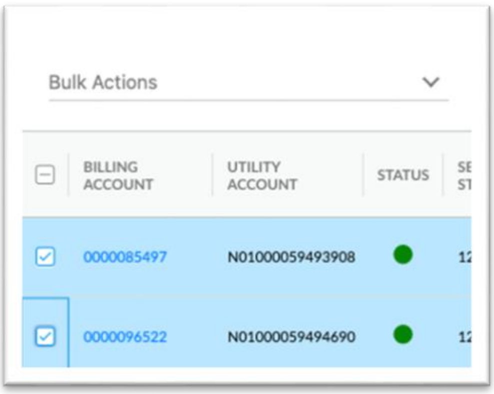
A confirmation pop up will display. Click **Stop AutoPay**.

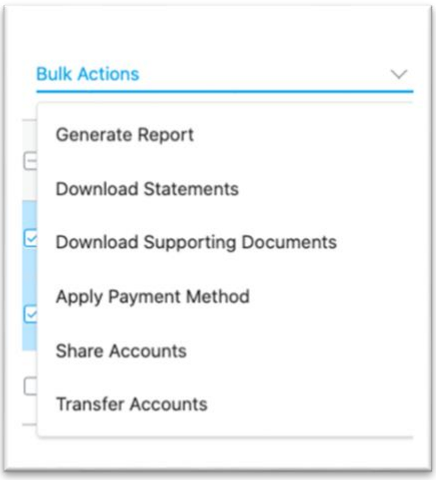


The toggle is now off and the AutoPay is off.

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.

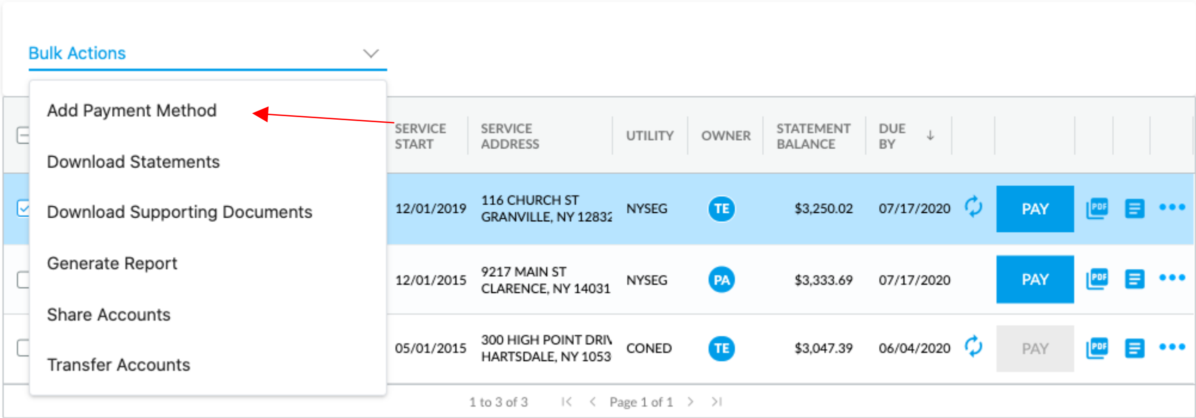




You can select from multiple options:

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

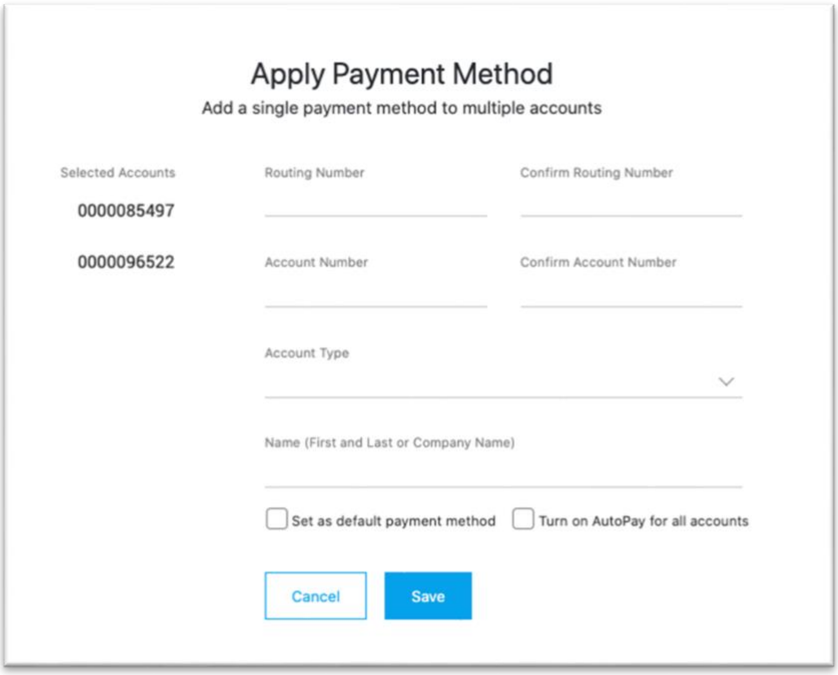
On the account list view, to the left of your accounts you will see a checkbox. Click on one or more checkboxes and a dropdown named **Actions** will appear. Click on **Apply Payment Method**.



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.

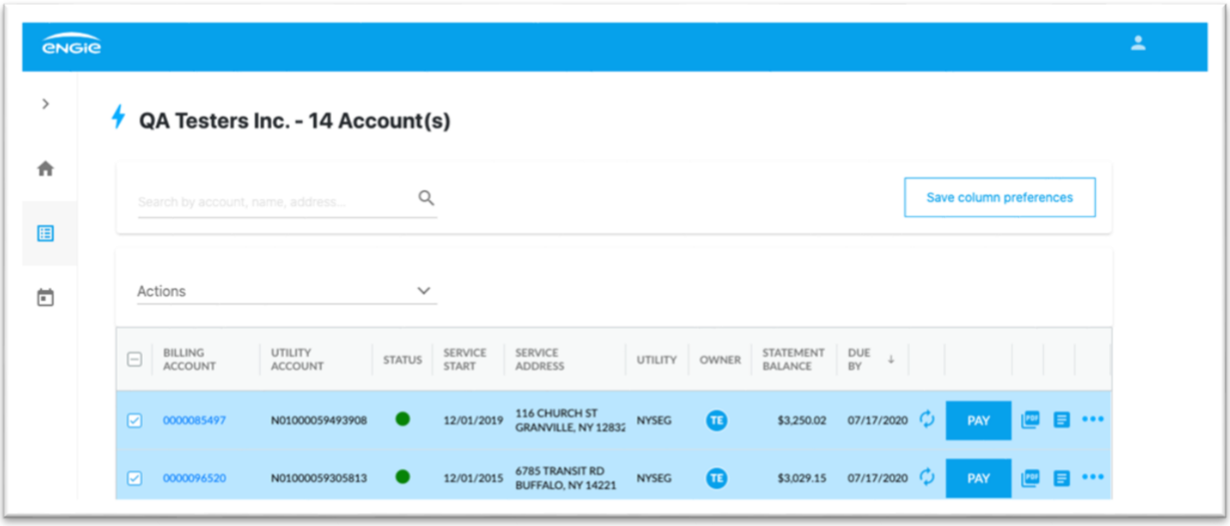
Next, fill out all of the payment information. If you would like to set this payment method as the default payment method for the selected accounts, select the checkbox at the bottom.

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

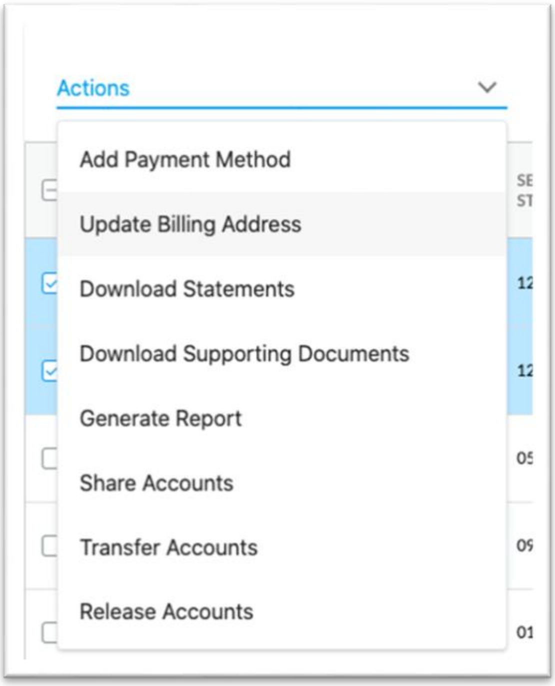


Bulk Update Billing Address – Update Billing Address for Multiple Accounts

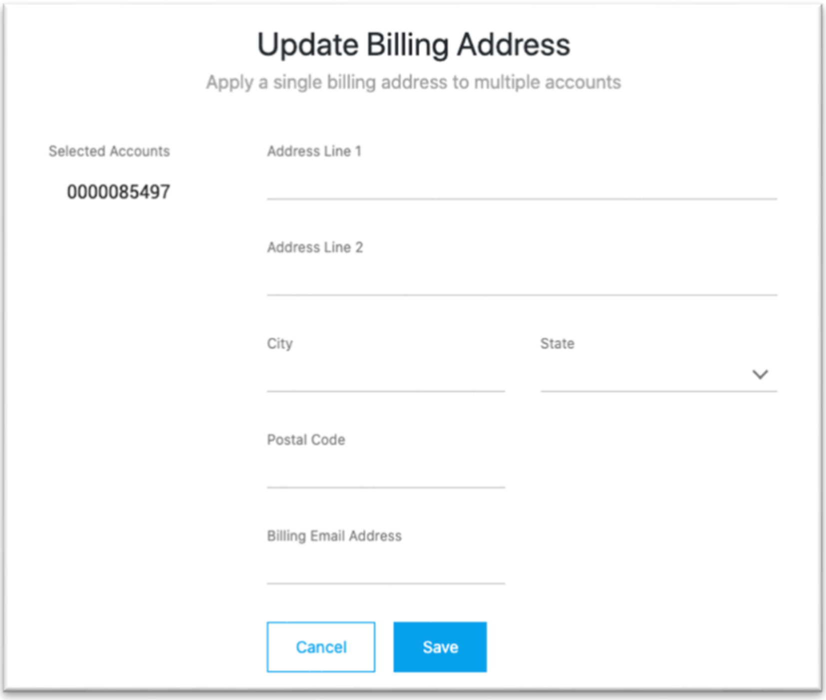
On the account list view, to the left of your accounts you will see a checkbox. Click on one or more checkboxes of the accounts you would like to update.



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

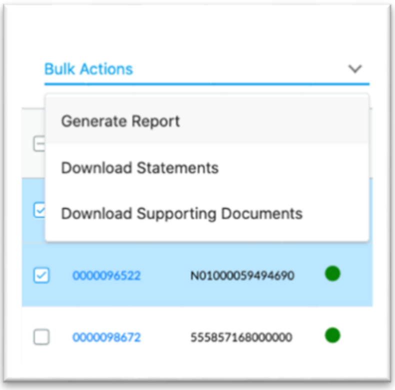


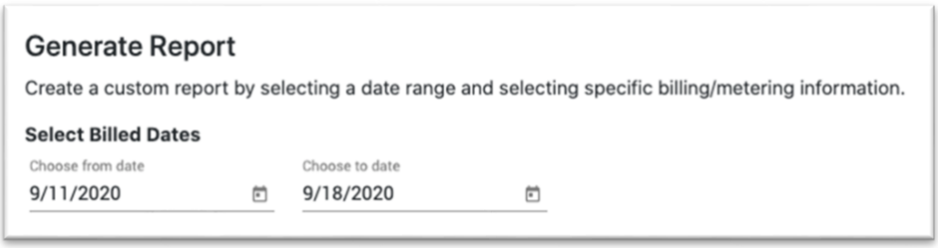
This will take you to the **Update Billing Address** page. Enter the information you would like updated, and press save. Once you go back to your account list view, the changes will be updated.



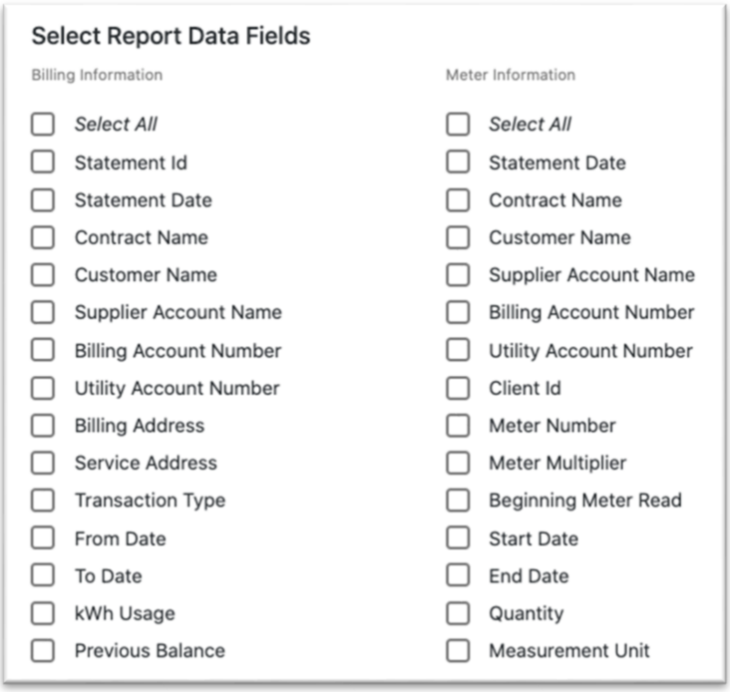
Bulk Generate Report – Generate a Report for Multiple Accounts

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**.



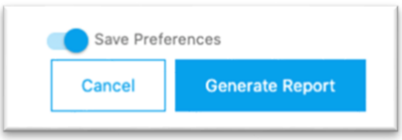


The **Generate Report** page displays a date range for the report. The page will default to the *To* billed date and the *From* billed date.



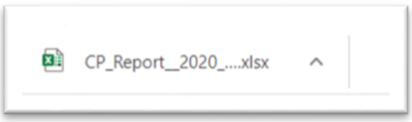
The page will display fields under two columns/sections: **Billing** and **Meter** information.

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

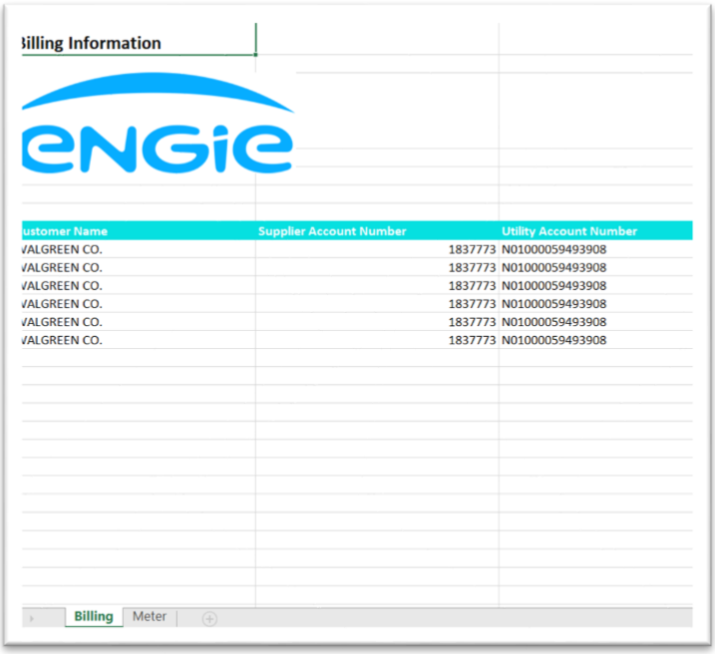


At the bottom of the page there is a toggle that you can turn on to save your preferences if you'd like to run the same report the next time you come into this page for the account.

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

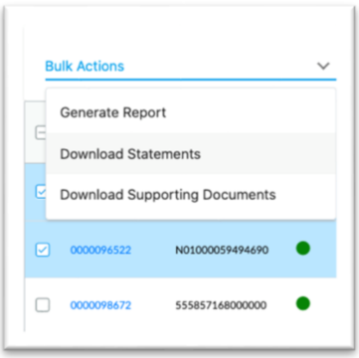


The excel file will have 2 tabs, one for **Billing Info** and one for **Meter Info**.



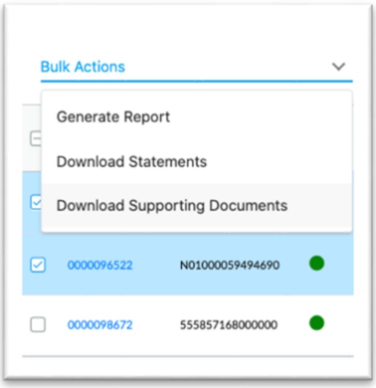
Bulk Download Statements – Download Statements (bills) for Multiple Accounts

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.

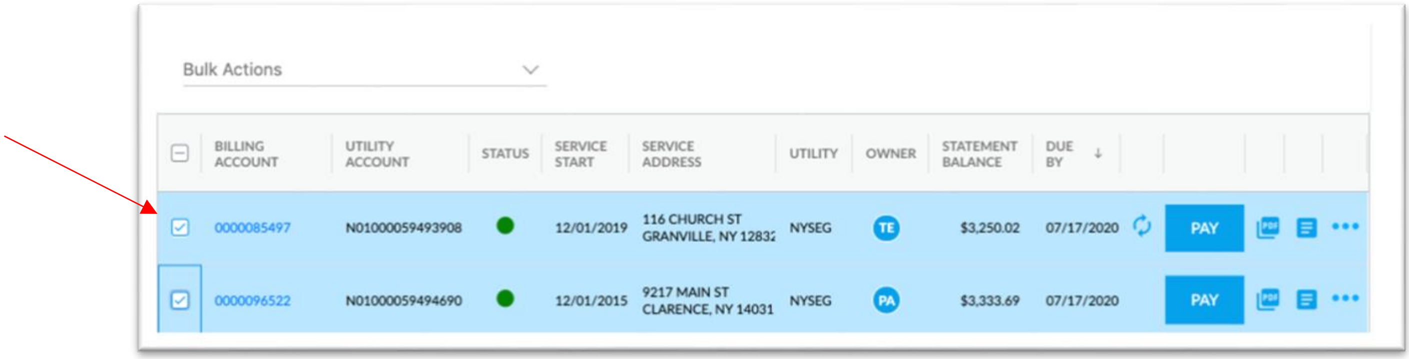


Bulk Download Supporting Documents – Download Supporting Documents for Multiple Accounts

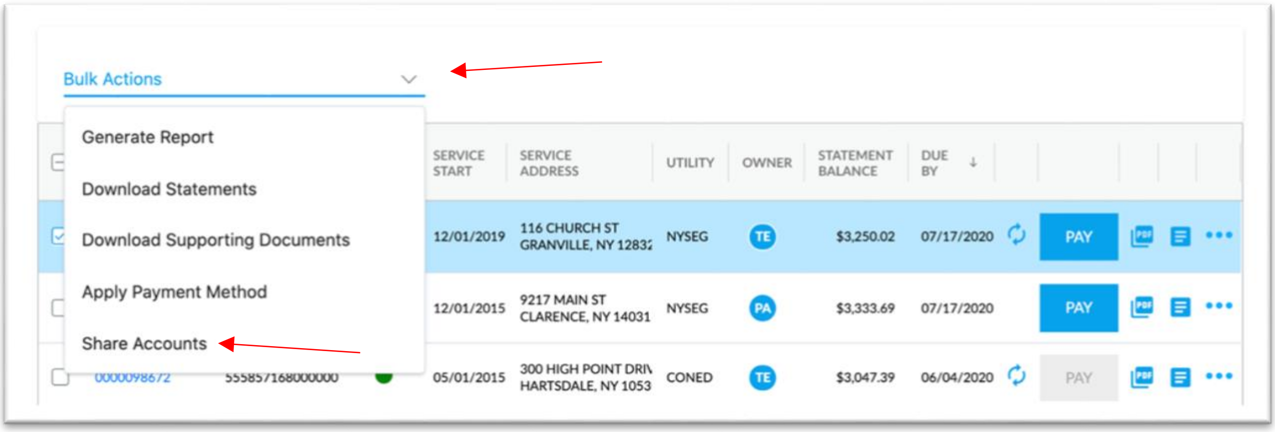
On the account list view, to the left of your accounts you will see a checkbox. Click on one or more checkboxes and a dropdown named **Actions** will appear. Click **Download Supporting Documents**. At the bottom of the browser the excel files will appear.

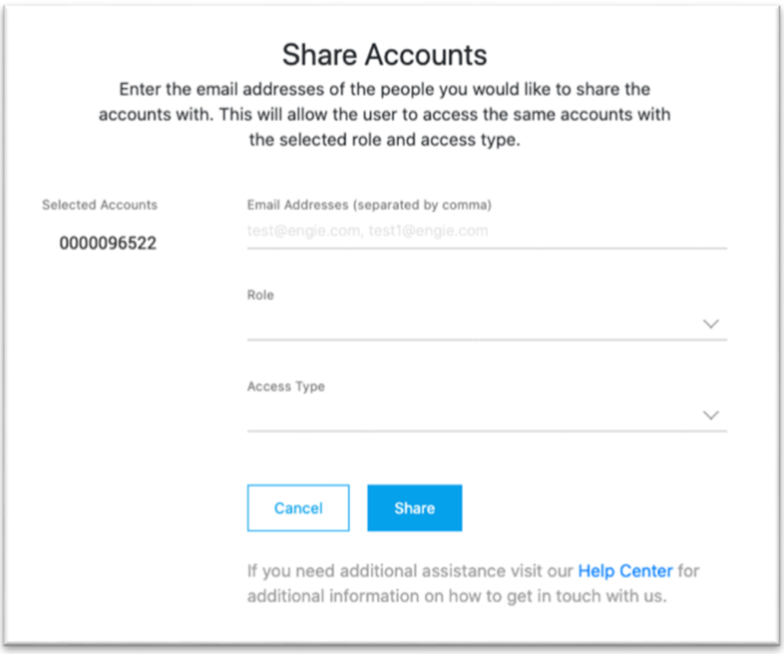

Bulk Actions
Generate Report
Download Statements
Download Supporting Documents
0000096522
N01000059494690
0000098672
555857168000000

Bulk Share Accounts – Share 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 **Share Accounts.**

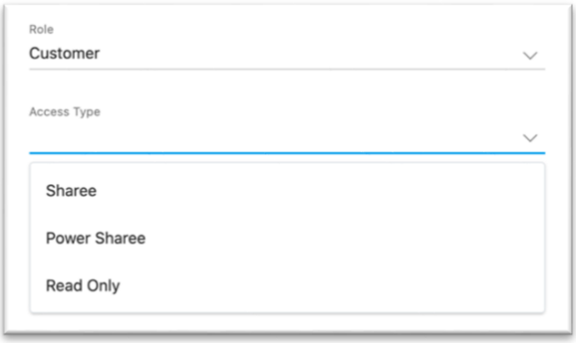




This will take you to the **Share Accounts** screen. On the left you will see the selected accounts you will be applying the change to. Please note that if you do not have permissions to share certain accounts, it will not display on the left.

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.

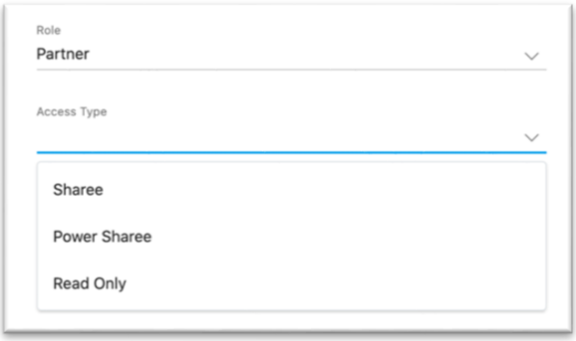
Next, select the Role for the accounts: either Customer or Partner.



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.*

- Read Only

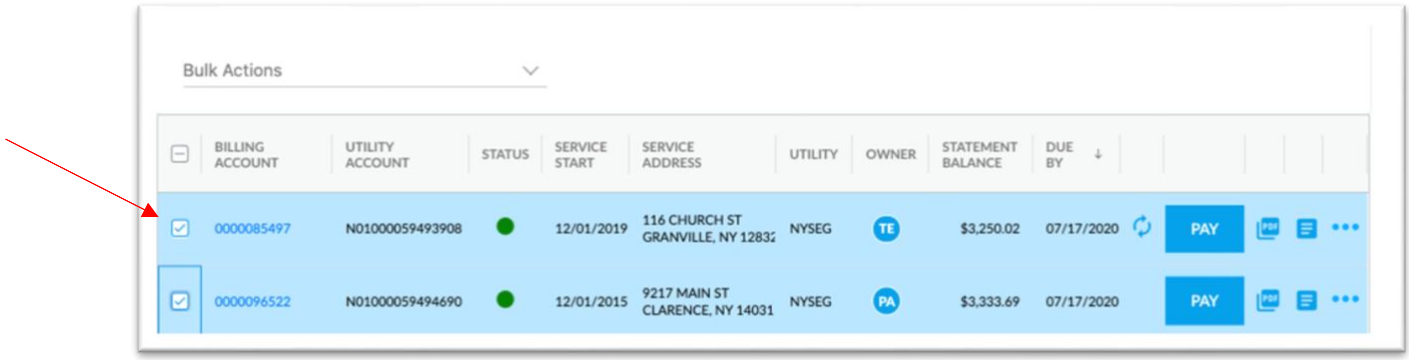
With Read Only access, a user can view all information pertinent to the account, however, they are only able to edit their user profile.

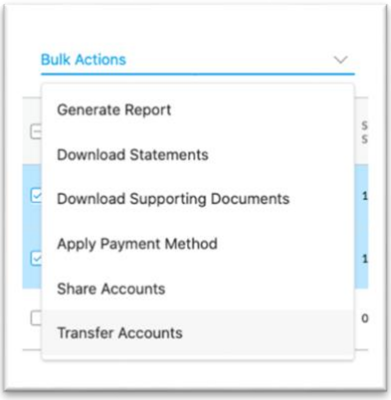
After selecting the Role and Access Type, Click **Share**. A message is displayed that the account(s) have been shared.

Bulk Transfer Accounts – Transfer Multiple Accounts at Once

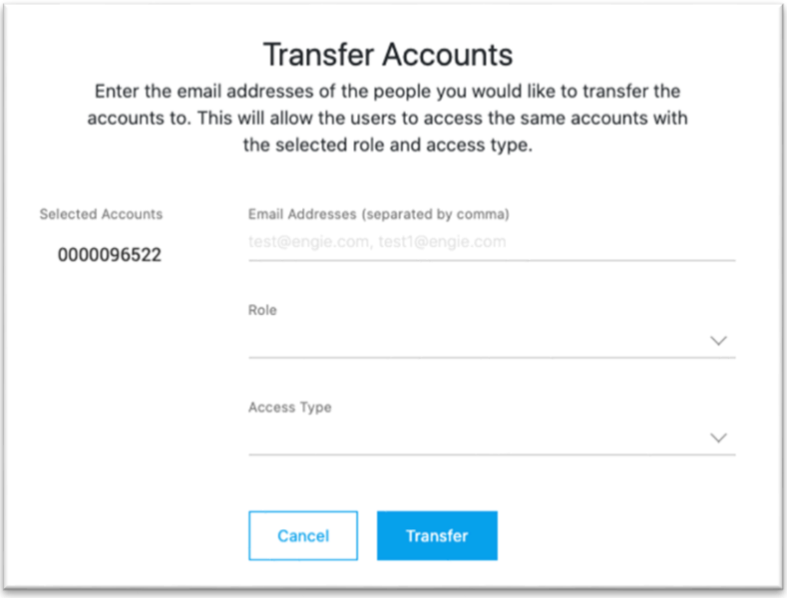
This feature is if you would like to transfer the account from your view to another user.

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.**





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



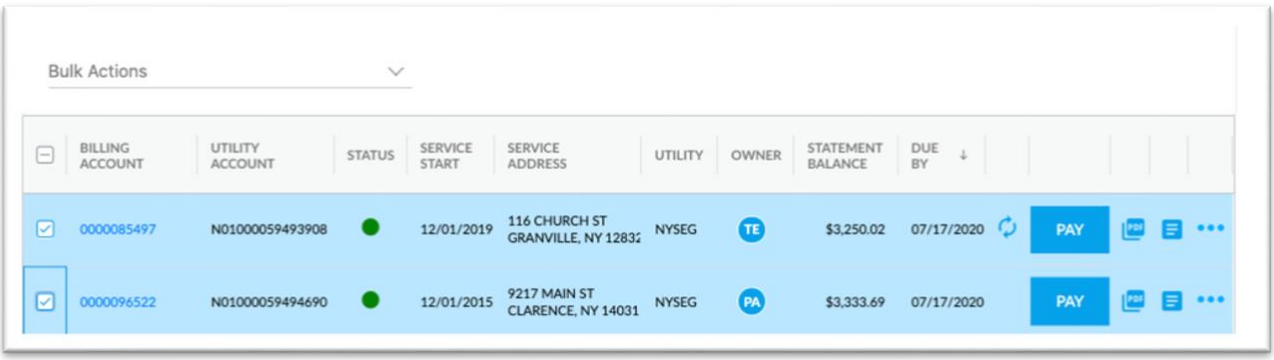
On the left you will see a list of the **selected accounts** you will be applying the change to. Please note that if you do not have permissions to transfer certain accounts, it will not display on the left.

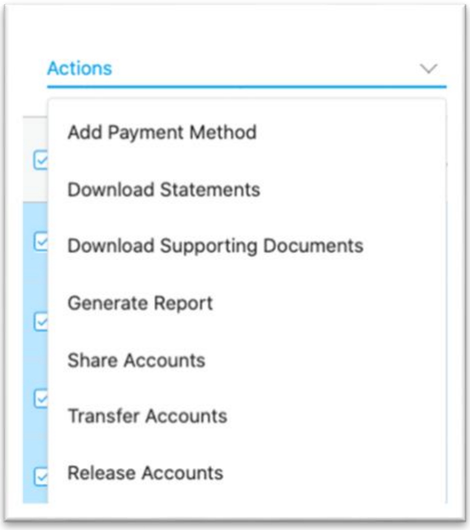
Fill out the email addresses in which you would like to transfer the selected accounts to. Make sure you separate the email addresses with a comma.

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

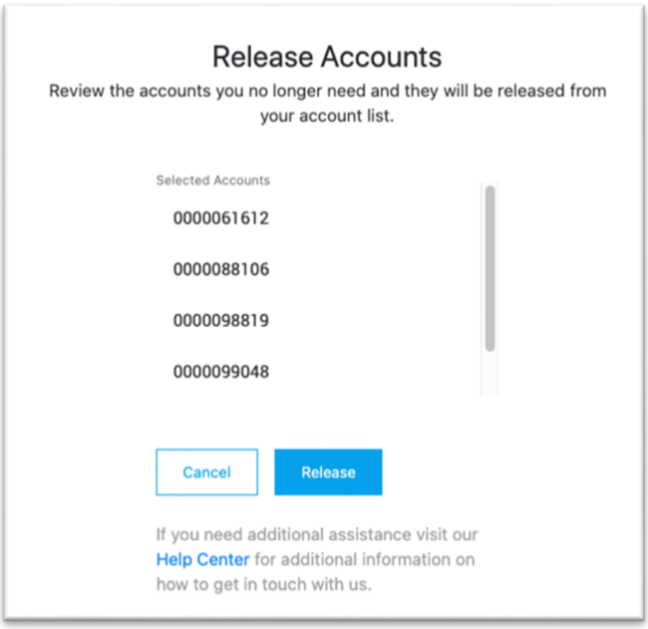
Bulk Release Accounts – Remove Multiple Accounts at Once

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.**



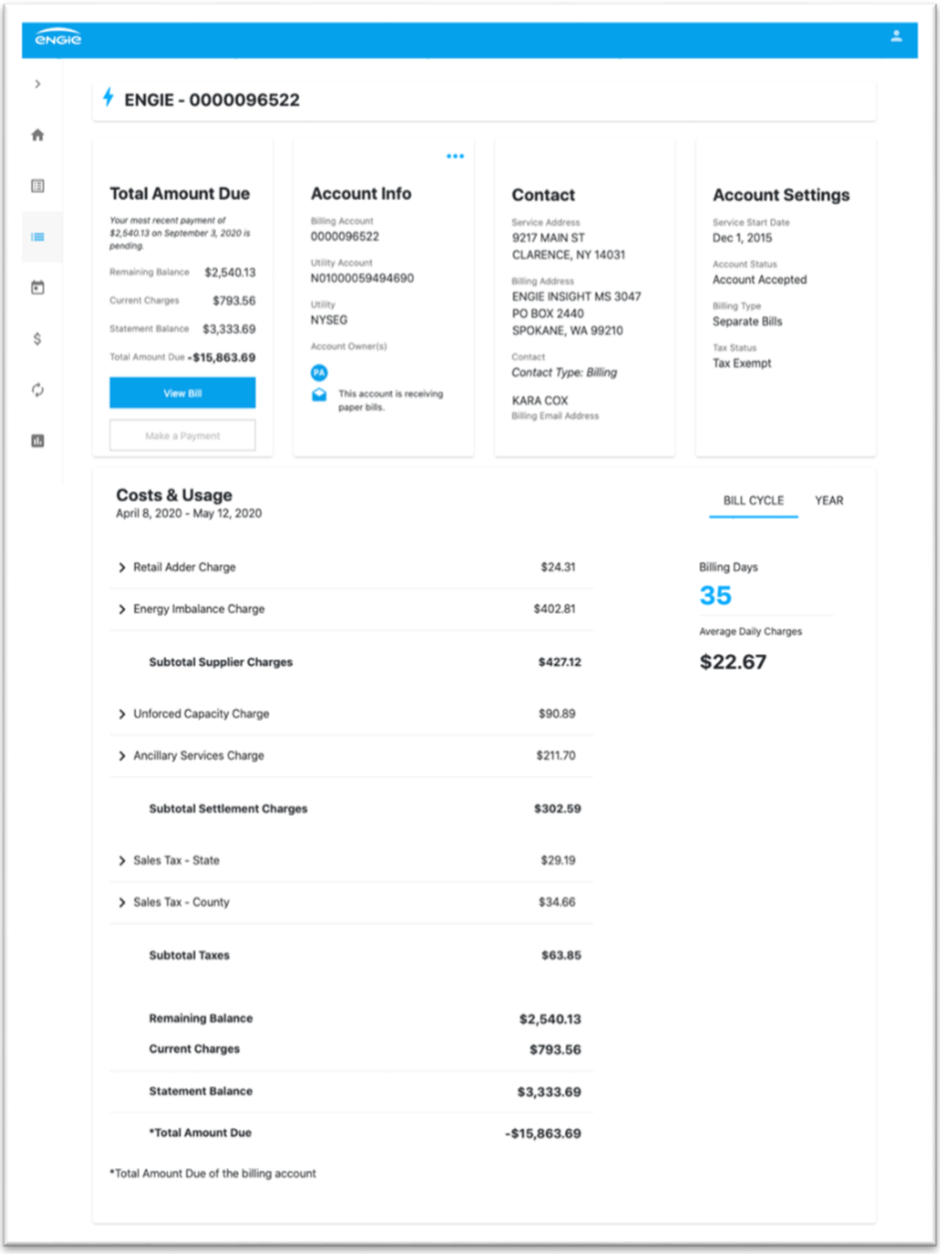


This will take you to the **Release Accounts** screen where the accounts you selected will display. Please note: if you do not have permissions to release an account, it will not display here. Once you click **Release**, those accounts will be removed from your user profile. Also, If you are the account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

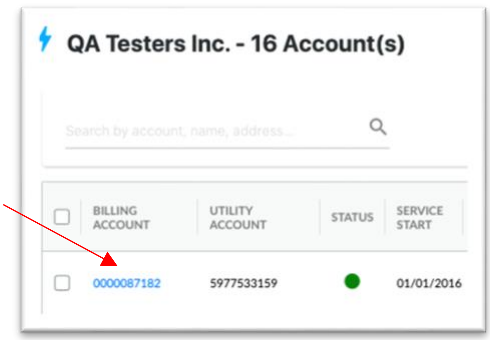


View Your Account(s) - Scenario 2: Account Detail View

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



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



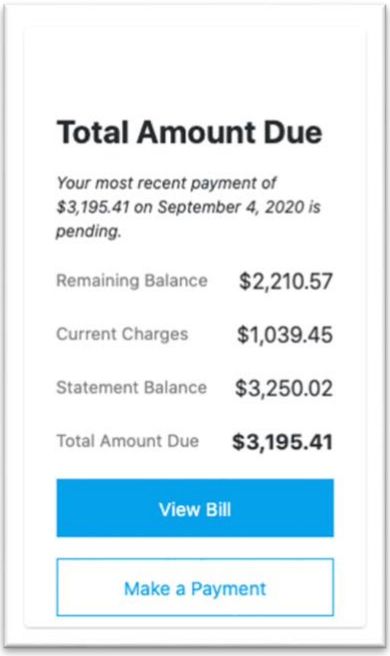
Account Information

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.

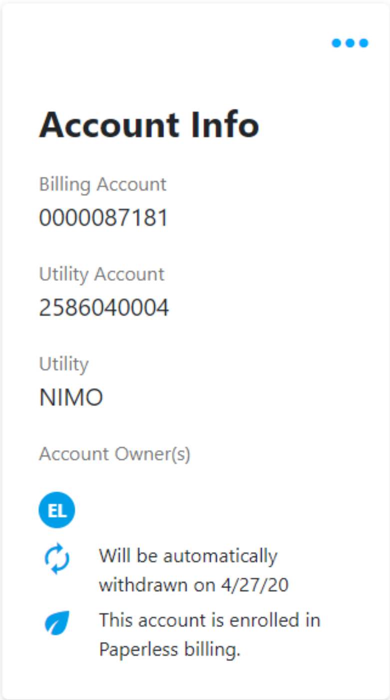
View Bill/Statement

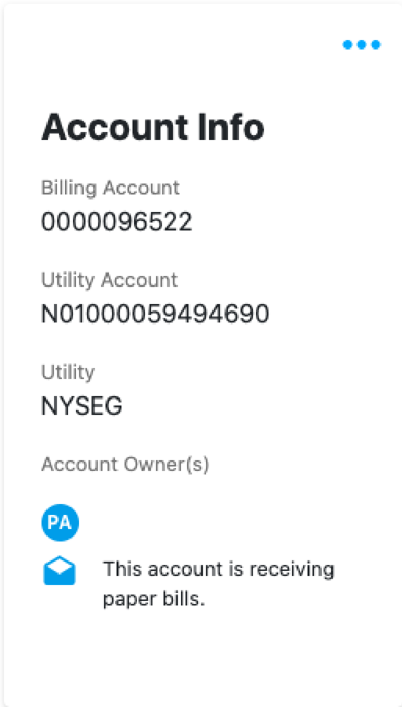
By clicking on the **View Bill** button it will open and display in a new tab the PDF of the bill/statement for the current period.

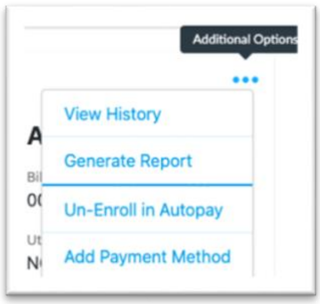
- Make a Payment (See section below for more detail how to make a payment)
    - Please note: The button will be disabled if there is no balance on the account.

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

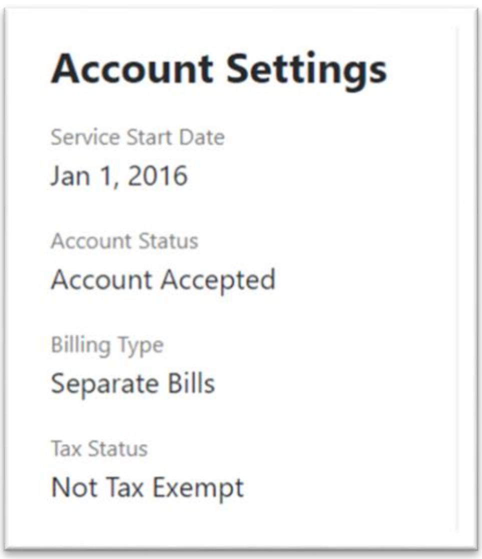
Contact Tile

Contact tile has the following information:

- 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:



- Service Start Date
- Account Status

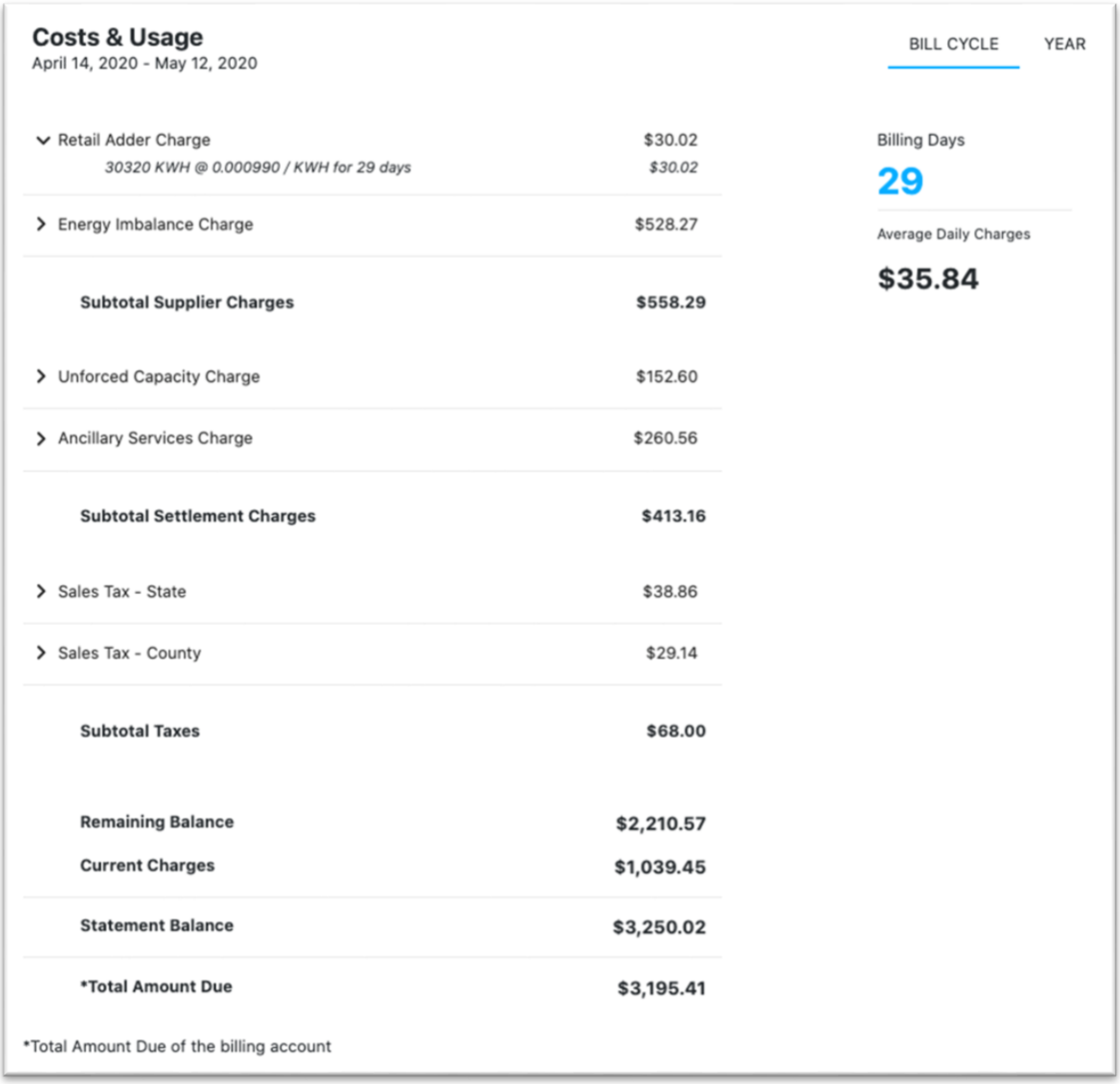
- Billing Type
- Tax Status

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.



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.

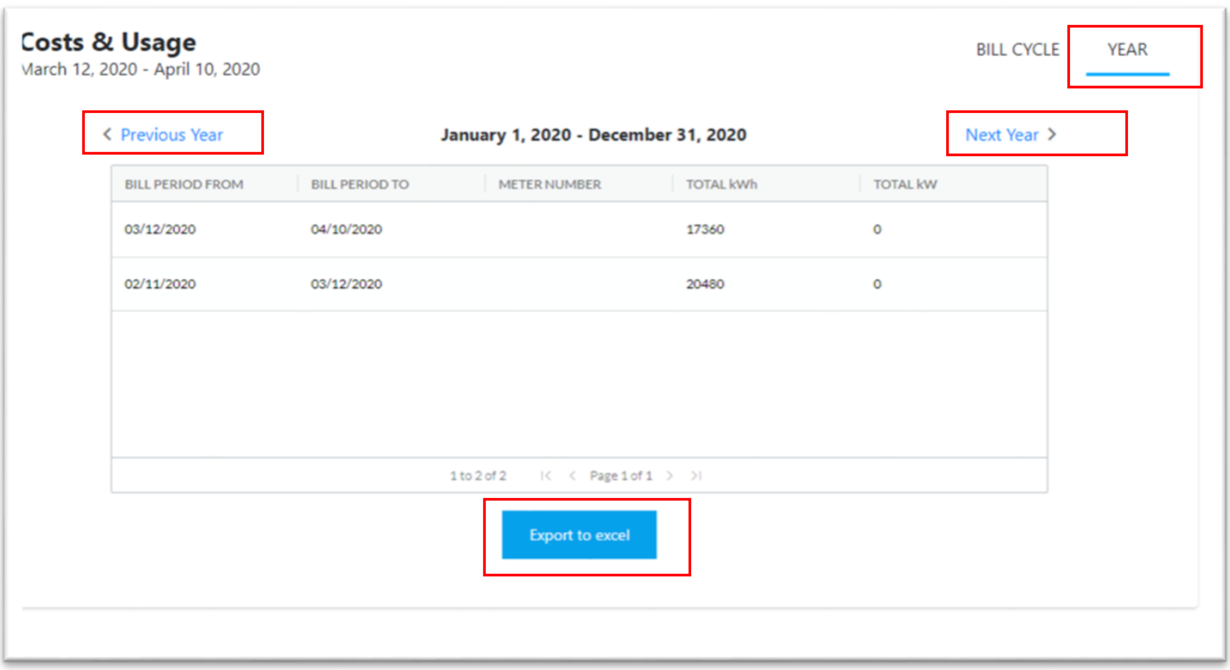
Bill Cycle Tab - Usage

Expand the carrot to view details of the line item charge

Year Tab - Usage

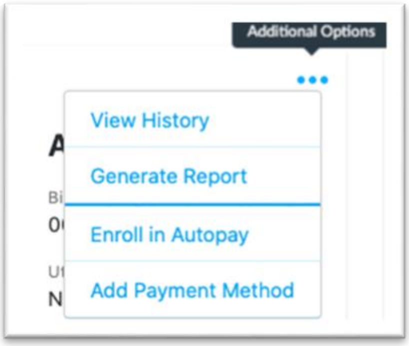
This tab within the section shows the usage for the year on the utility account selected

- 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

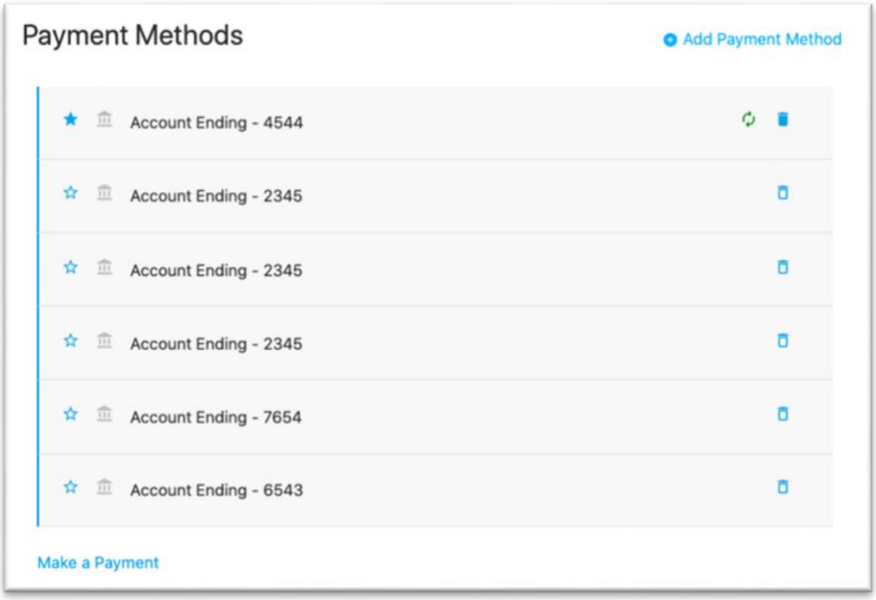


Add/Delete a Payment Method: Scenario 1

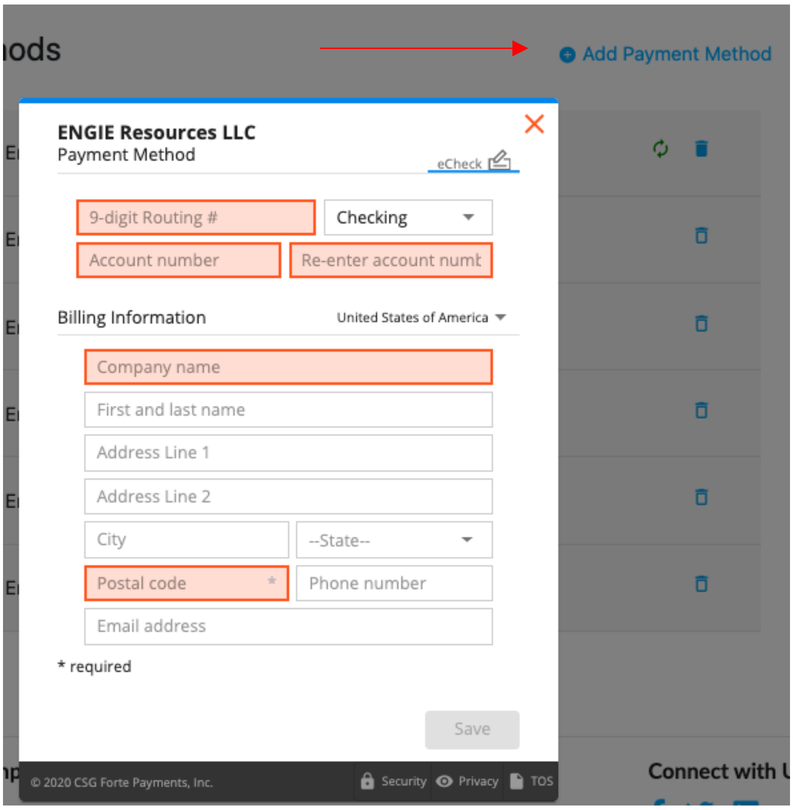
When you are on your account detail page, locate the **Account Info** tile and click on the icon with three blue horizontal dots. Click **Add Payment Method**.



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



Add Payment Method



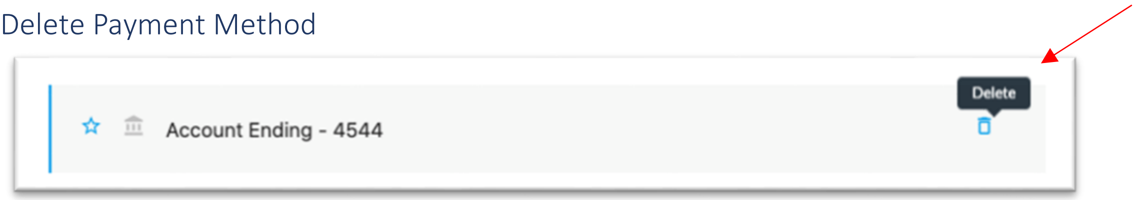
At the top right of the page there will be a **Add Payment Method** link.

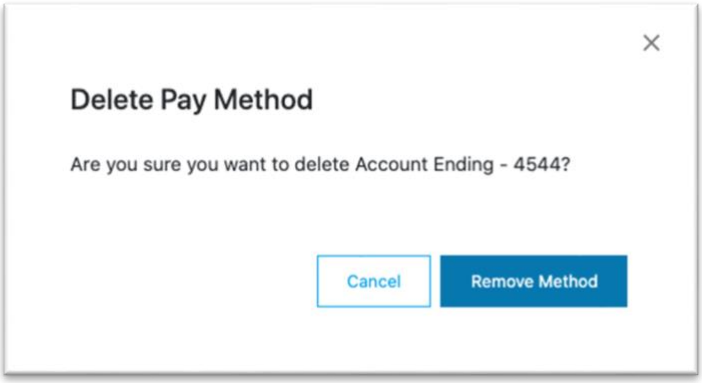
Select this to be taken to a pop up that will have you enter in payment information. Please note at this time payments can only be made from a checking or savings account.

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

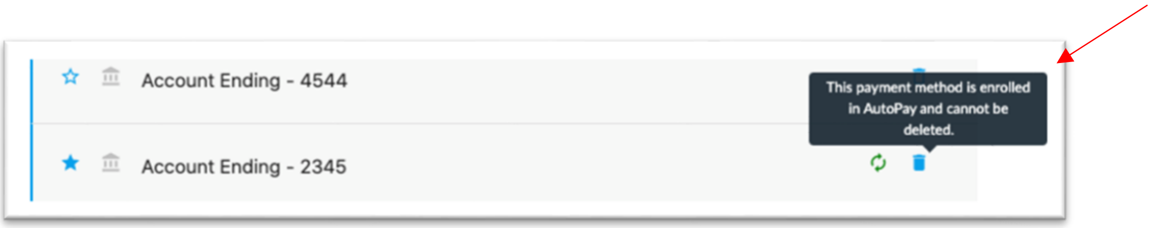
Click **Save**, and you will see a confirmation message that your payment method has been added.

Delete Payment Method





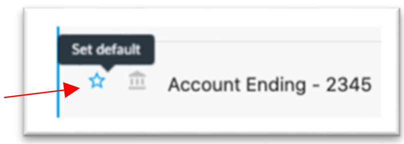
If you no longer need a payment method, you can remove it from the list. Click on the trash can icon to the right of the payment method to delete it. A pop up will appear asking you to confirm you want to delete the payment method. Click **Remove Method** to continue. The payment method will then be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

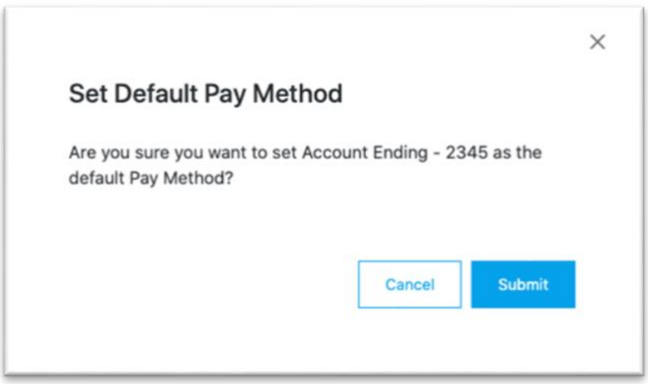


Please note that a payment **cannot** be deleted if it is the payment method that is enrolled in AutoPay. AutoPay is always tied to the default payment method. If you do want to delete a payment method that is associated with AutoPay, change the default payment method and it will tie AutoPay with that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

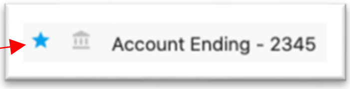
Default Payment Method

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

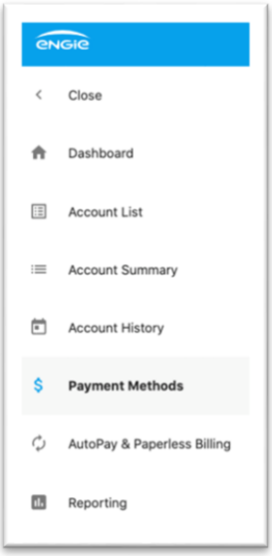




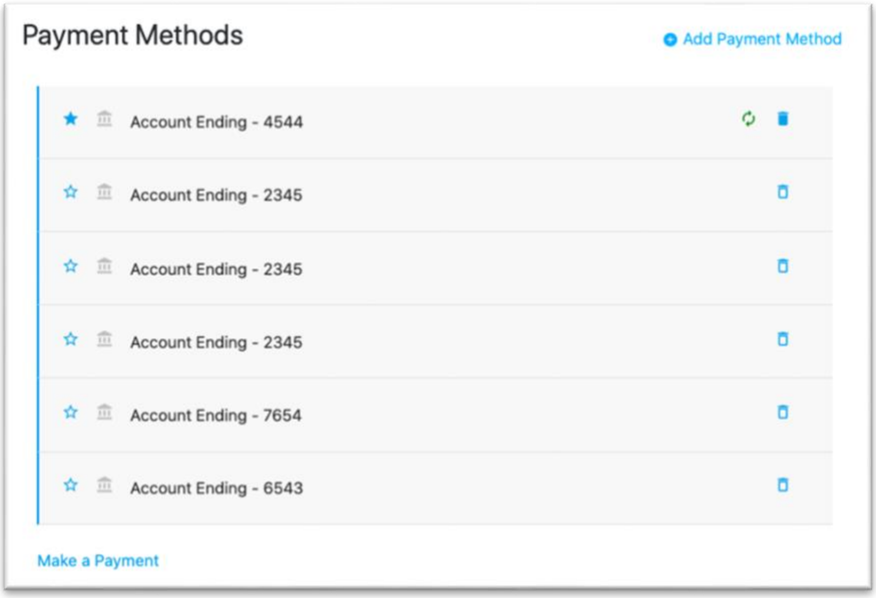
A pop up will appear, asking you to confirm you want to set it as the default pay method. Select **Submit** to continue. A blue star icon will now appear next to the new default pay method.



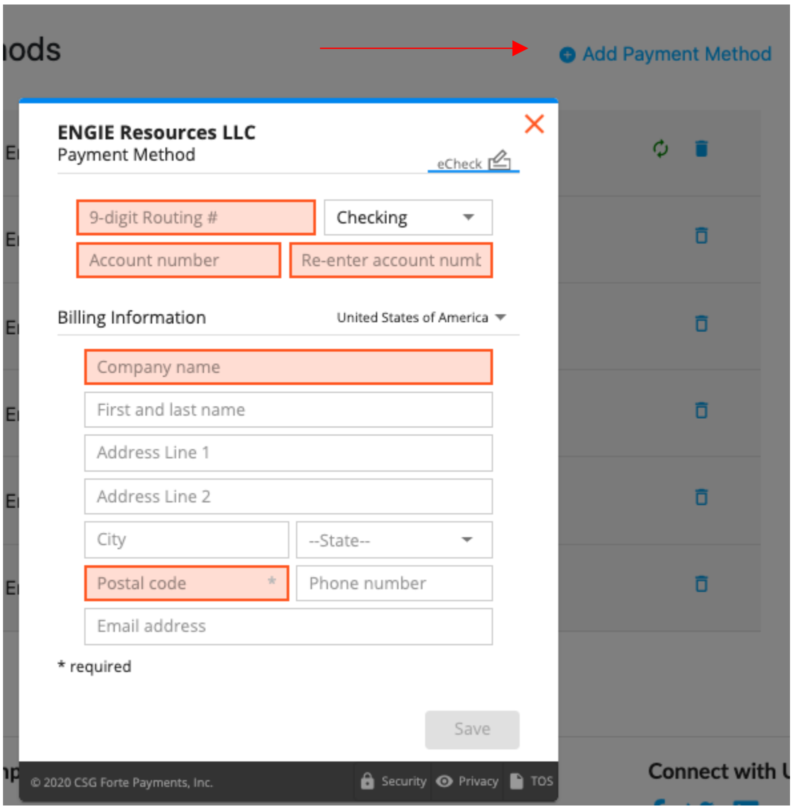
Add/Delete a Payment Method: Scenario 2



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



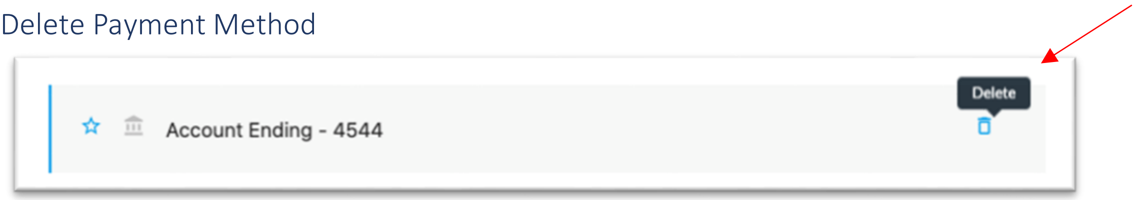
At the top right of the page there will be a **Add Payment Method** link.

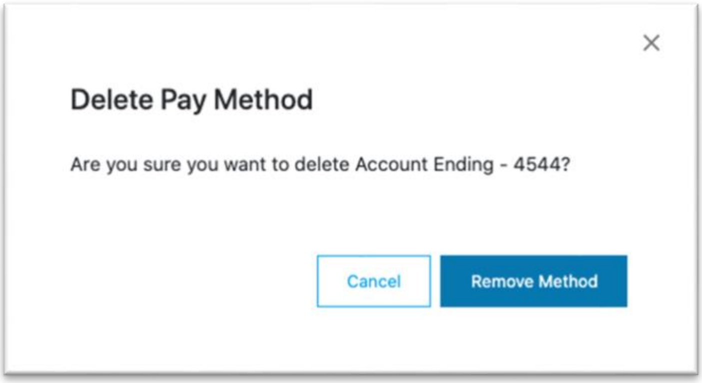
Select this to be taken to a pop up that will have you enter in payment information. Please note at this time payments can only be made from a checking or savings account.

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





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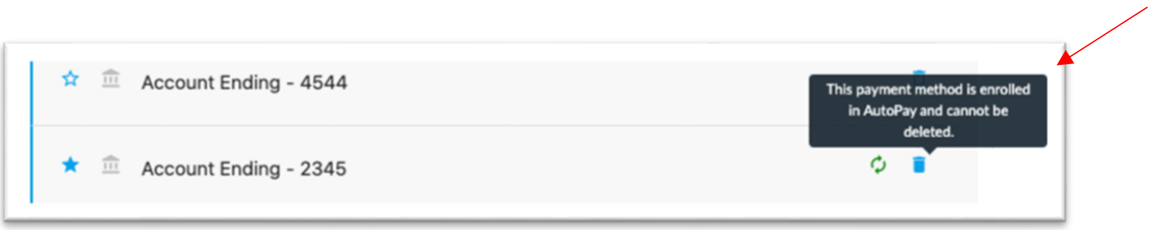
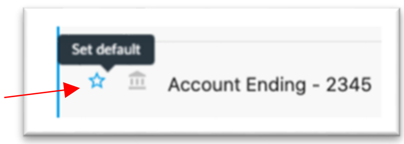
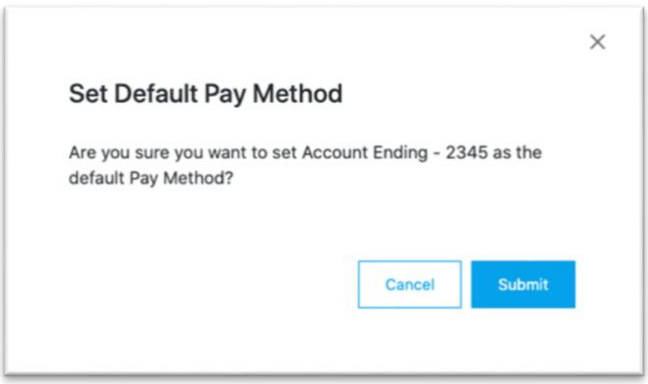


Please note that a payment **cannot** be deleted if it is the payment method that is enrolled in AutoPay. AutoPay is always tied to the default payment method. If you do want to delete a payment method that is associated with AutoPay, change the default payment method and it will tie AutoPay with that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

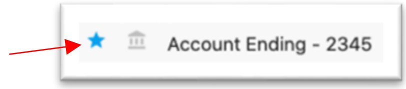
Default Payment Method

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



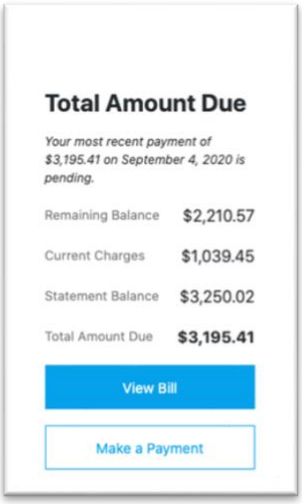


A pop up will appear, asking you to confirm you want to set it as the default pay method. Select **Submit** to continue. A blue star icon will now appear next to the new default pay method.

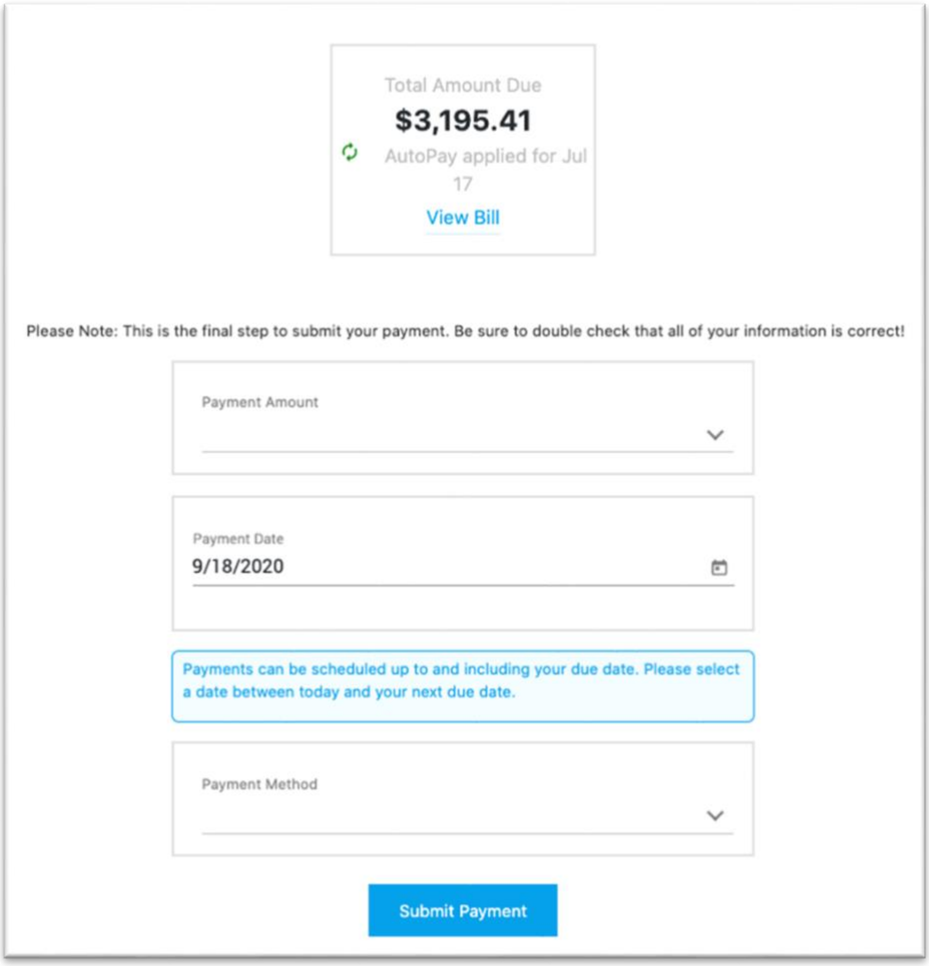


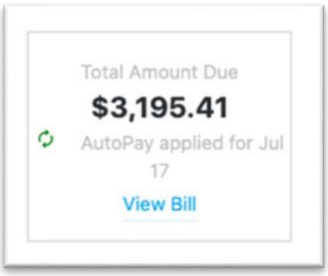
Make a Payment

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.



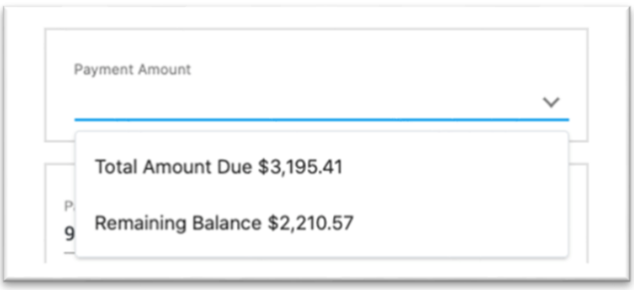


The top section will show your total amount due and if it is enrolled in AutoPay, a message will appear here to indicate that. You can still proceed even though you are enrolled in AutoPay if you want to make a one-time payment.

View Bill

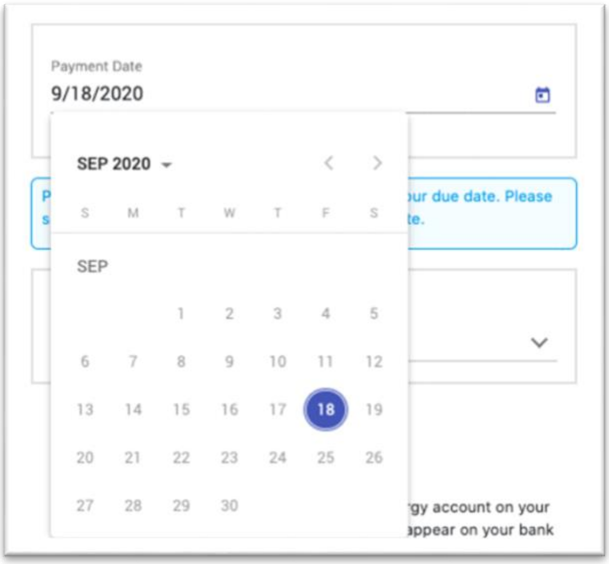
You can also view your bill you are paying on here. This will open up a PDF of the statement.

Payment Amount



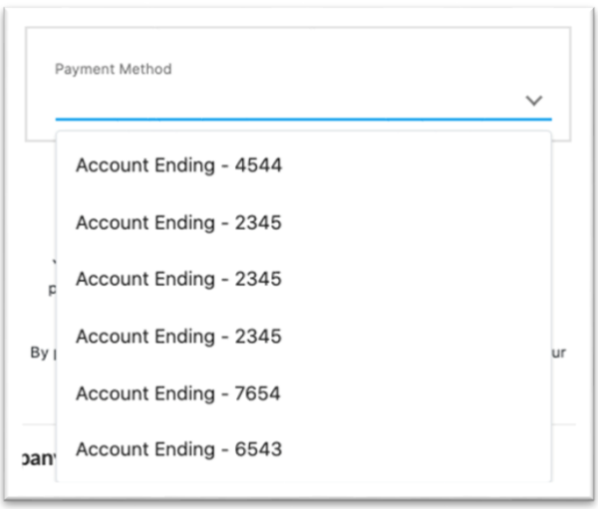
When clicking on the caret (down arrow), you will see the total amount due and the remaining balance.

Payment Date



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

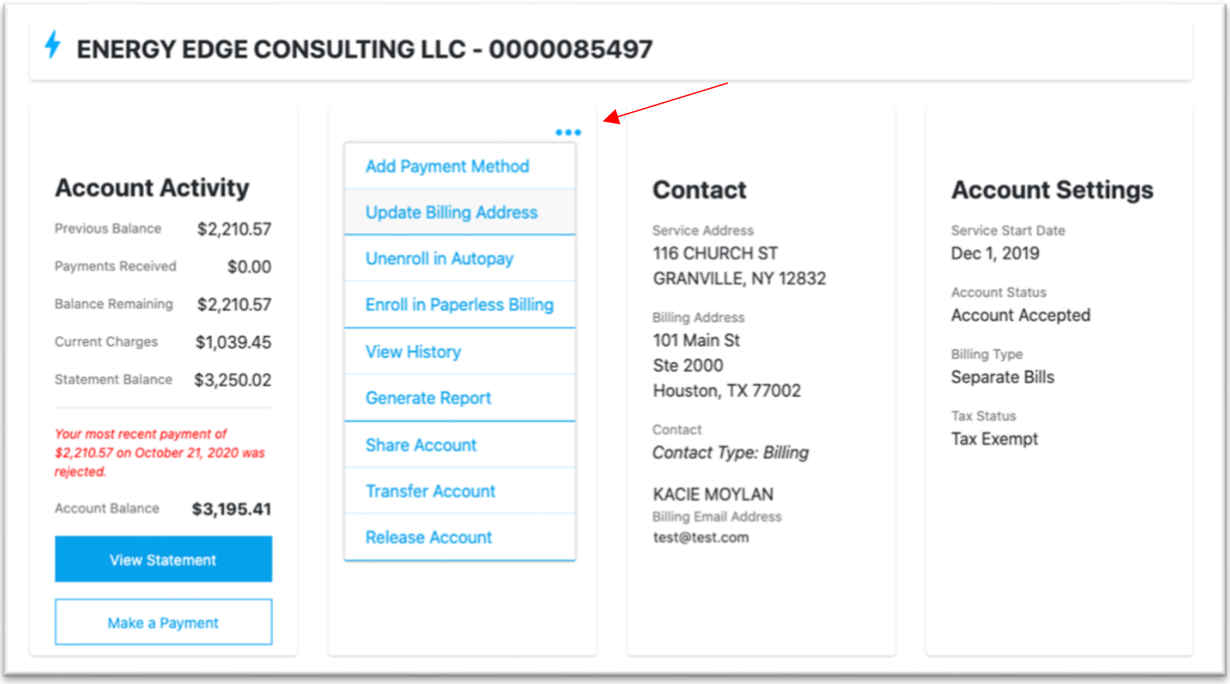
Payment Method



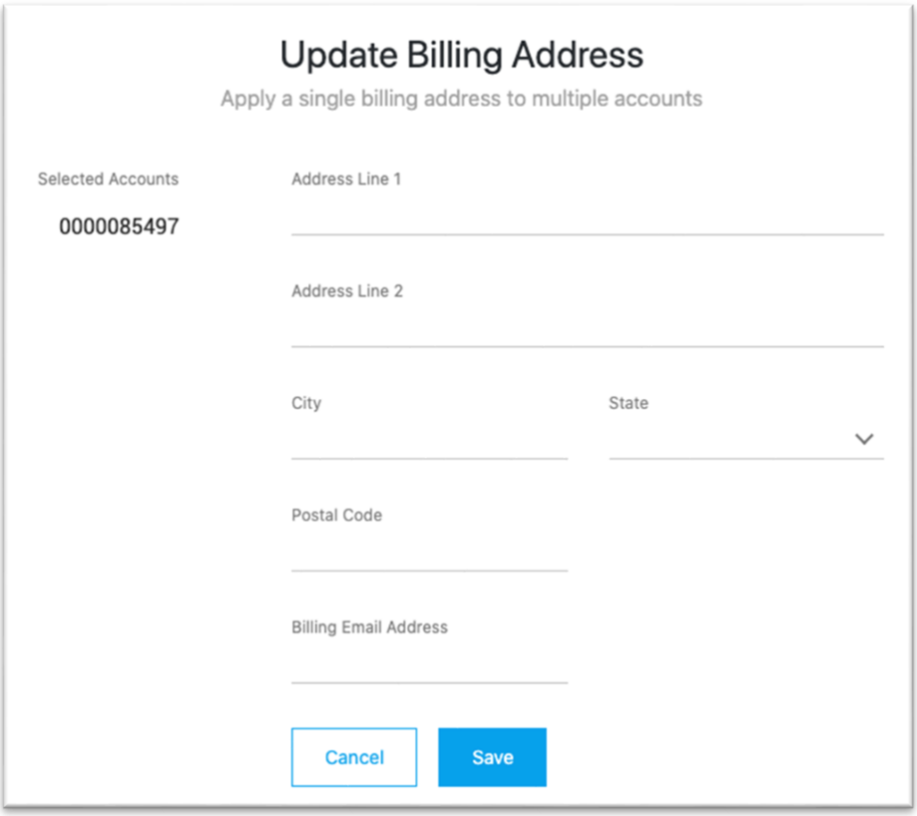
When clicking on the caret (down arrow), you will see all of your payment methods that have been added. Click on the payment method you would like to use, then click the **submit payment** button. You will receive a confirmation message saying that your payment has been made.

Update Billing Address

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

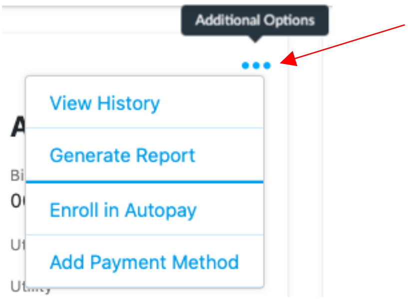


This will take you to a page where you can update the information and press **save**.



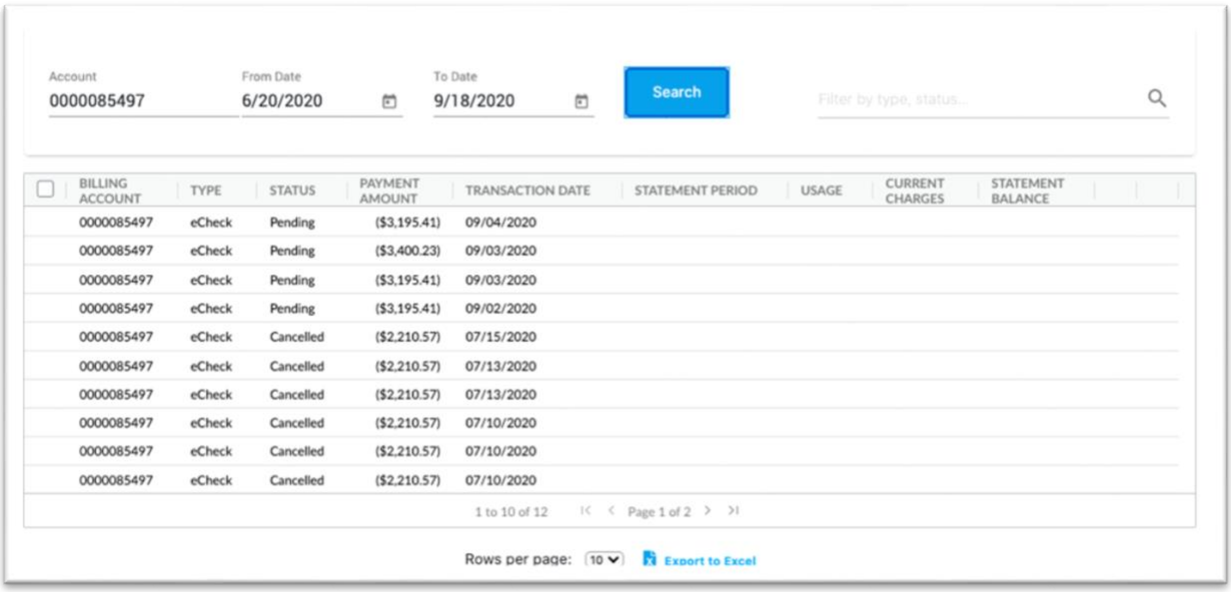
View Account History

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.



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

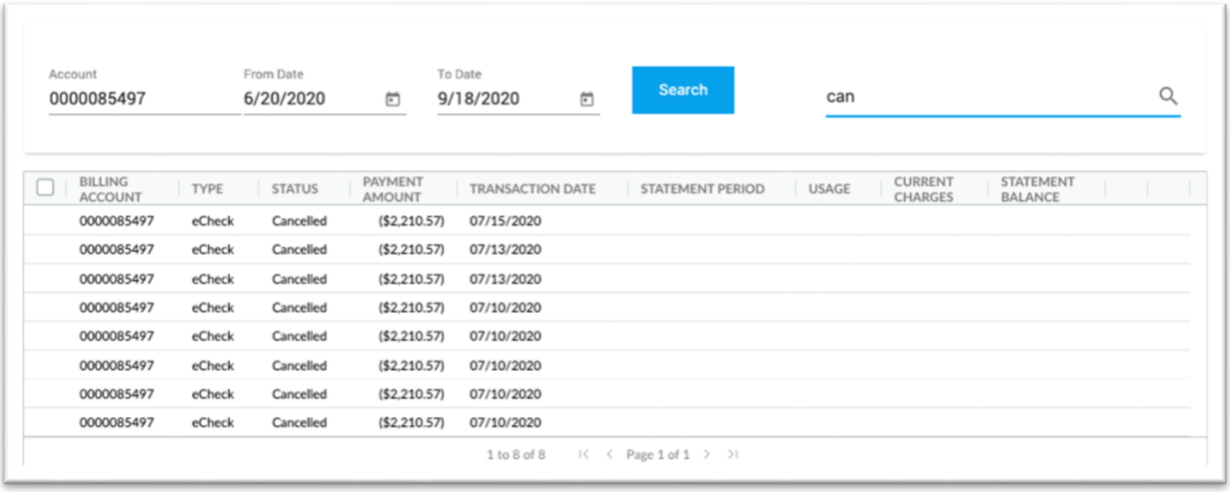
BILLING ACCOUNT	TYPE	STATUS	PAYMENT AMOUNT	TRANSACTION DATE	STATEMENT PERIOD	USAGE	CURRENT CHARGES	STATEMENT BALANCE
0000085497	eCheck	Pending	($3,195.41)	09/04/2020				
0000085497	eCheck	Pending	($3,400.23)	09/03/2020				
0000085497	eCheck	Pending	($3,195.41)	09/03/2020				
0000085497	eCheck	Pending	($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.)

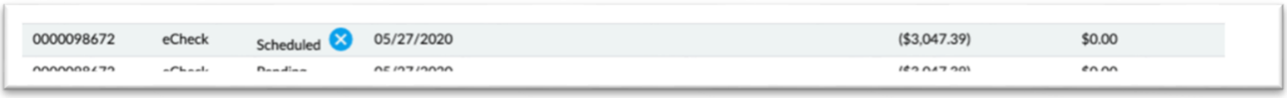
You can filter by billing account number, type, status, and usage. Once you start typing it will automatically narrow down the list. You don't have to press the search icon after.



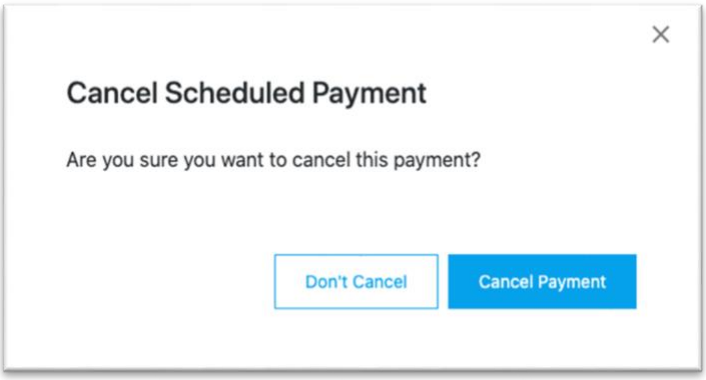
Cancel a Pending Payment

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

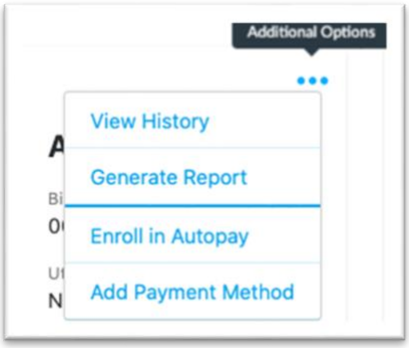


A confirmation modal appears. Click **Cancel Payment** to continue.

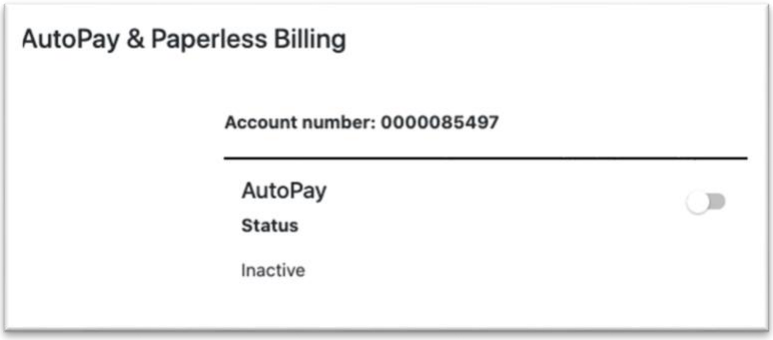


Enroll in AutoPay

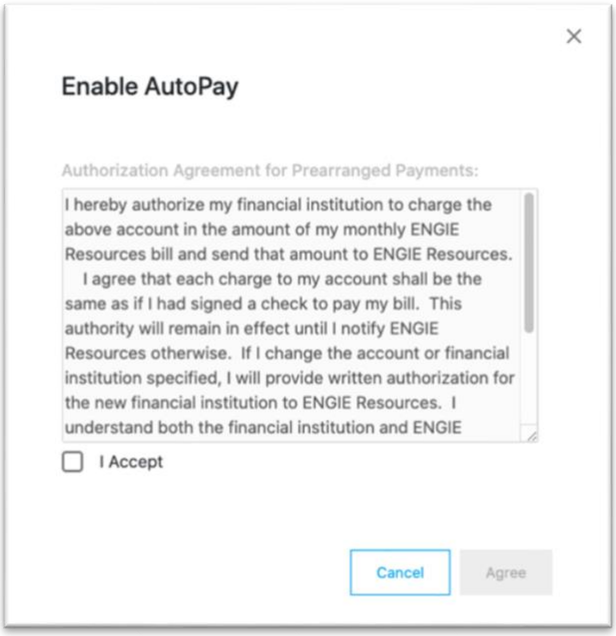
When you are on your account detail view, click on the three horizontal blue dots at the top of **Account Info** tile.



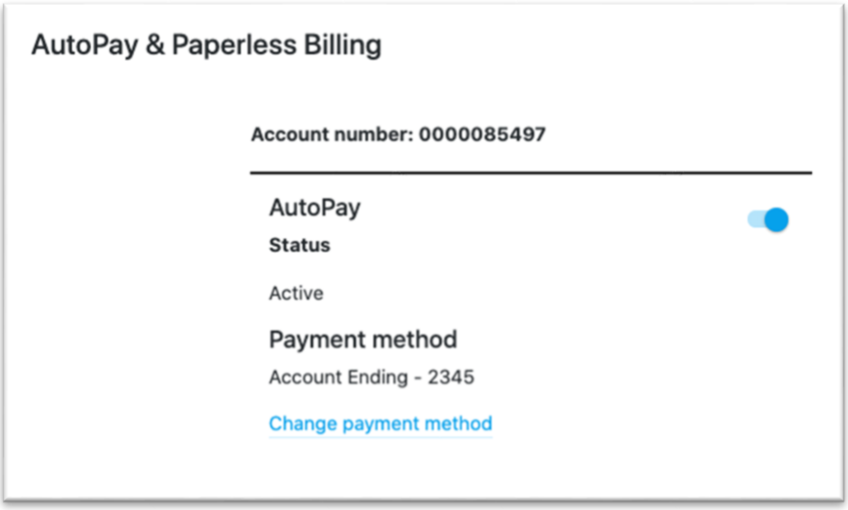
Click the option **Enroll in AutoPay**. This will take you to the **AutoPay & Paperless Billing** page for that specific account.



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.

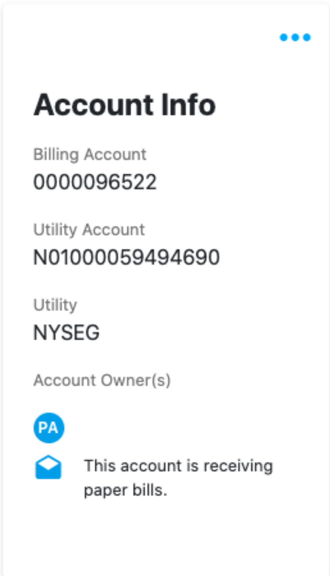


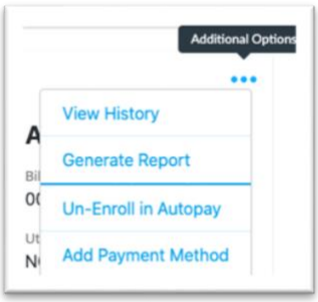
The toggle is now on and active with the default payment method used.



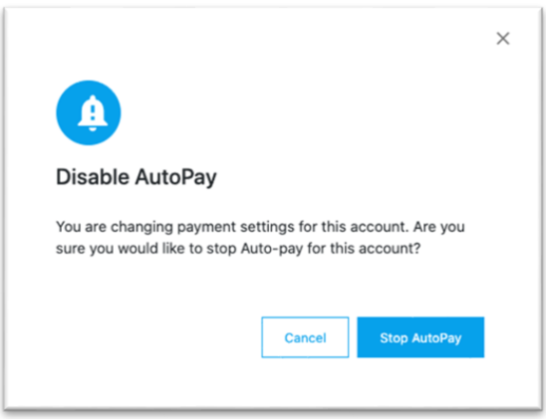
Un-Enroll in AutoPay

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





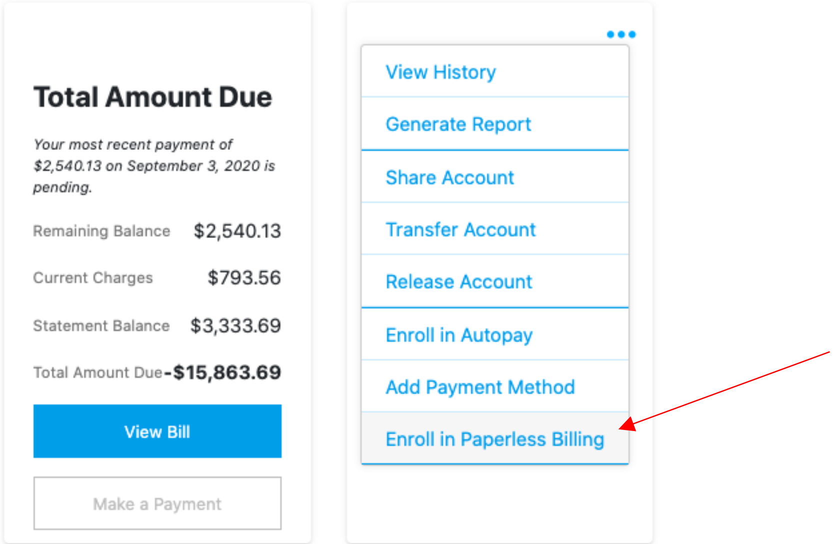
A confirmation pop up will display. Click **Stop AutoPay**.



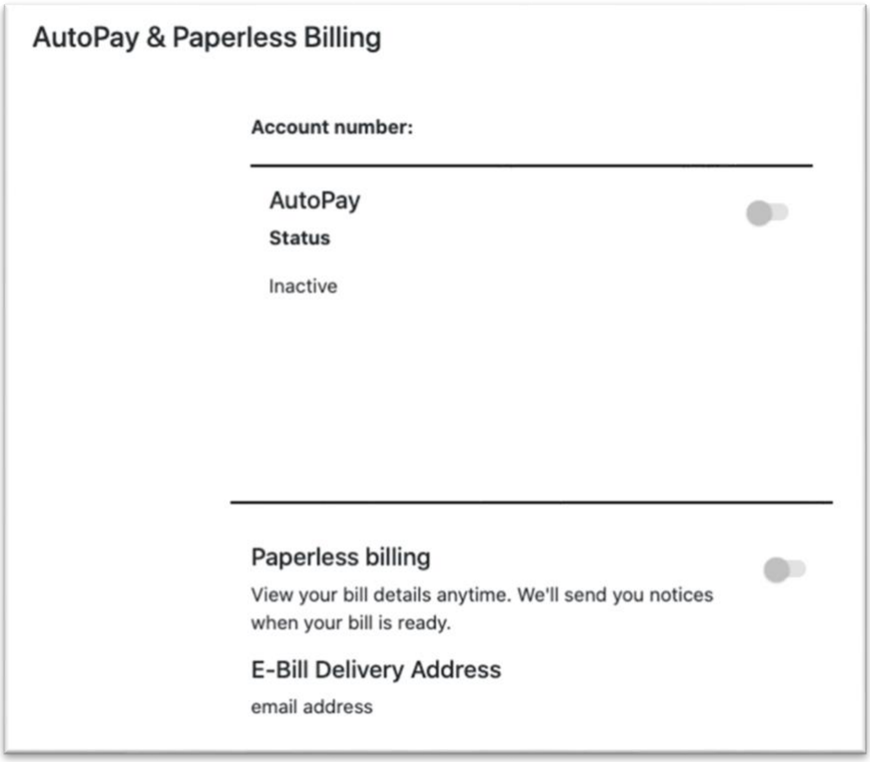
The toggle is now off and the AutoPay is off.

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

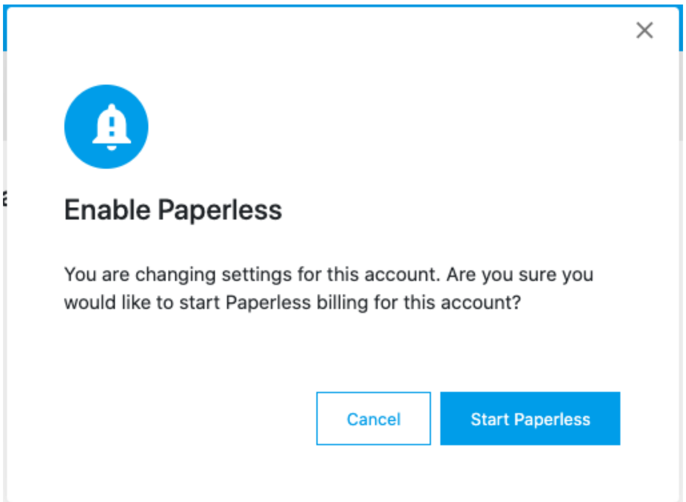
When you are on your account detail view, locate the **Account Info** tile and select the icon with the 3 blue horizontal dots.



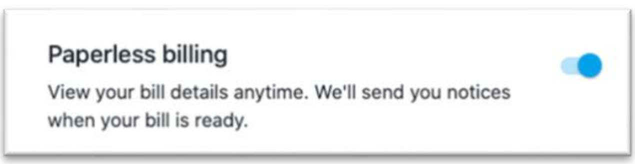
Click on **Enroll in Paperless Billing**. This will take you to the AutoPay & Paperless Billing page.



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

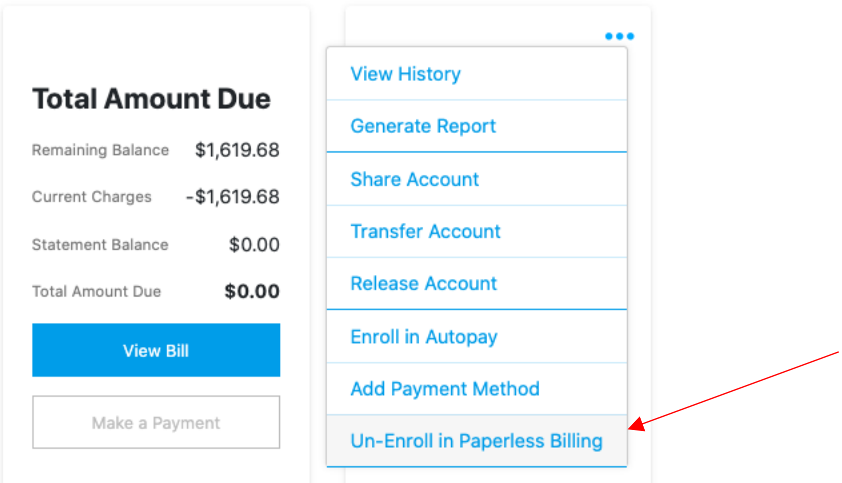


Click **Start Paperless** to continue and now the toggle is on and you are enrolled.

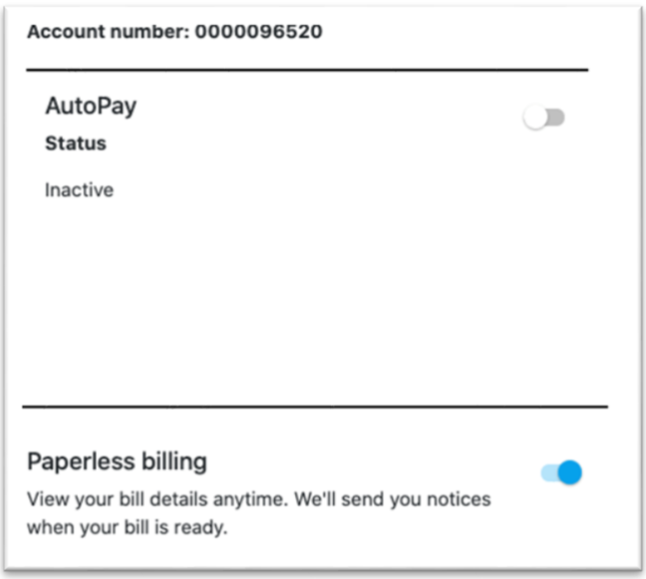


Un-Enroll in Paperless Billing

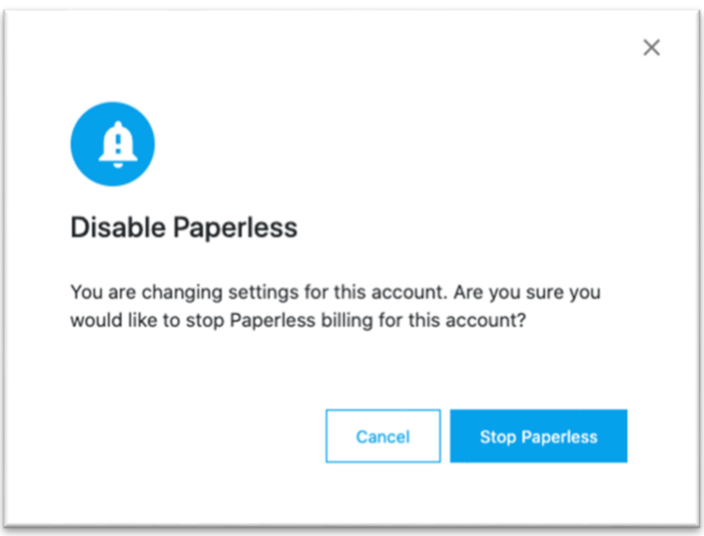
When you are on your account detail view, locate the **Account Info** tile and select the icon with the 3 blue horizontal dots.



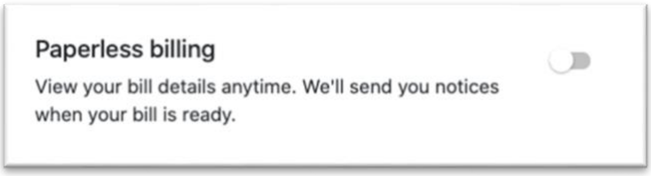
Click on **Un-Enroll in Paperless Billing**. This will take you to the AutoPay & Paperless Billing page.



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



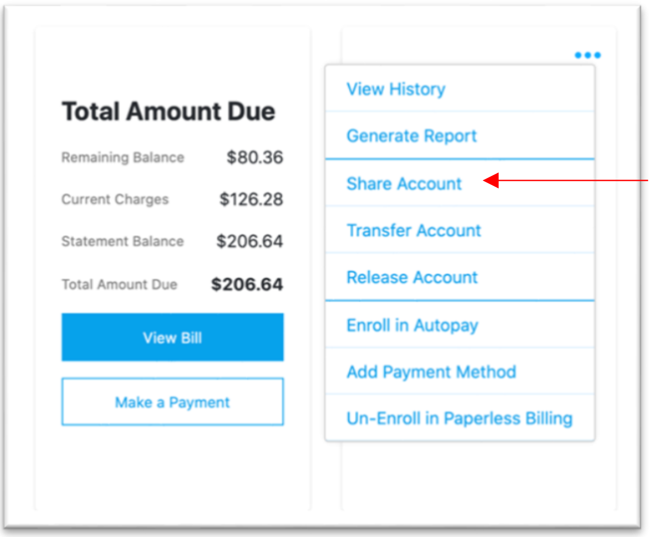
Click **Stop Paperless** to continue and now the toggle is off and you will start receiving paper bills with the next billing cycle.

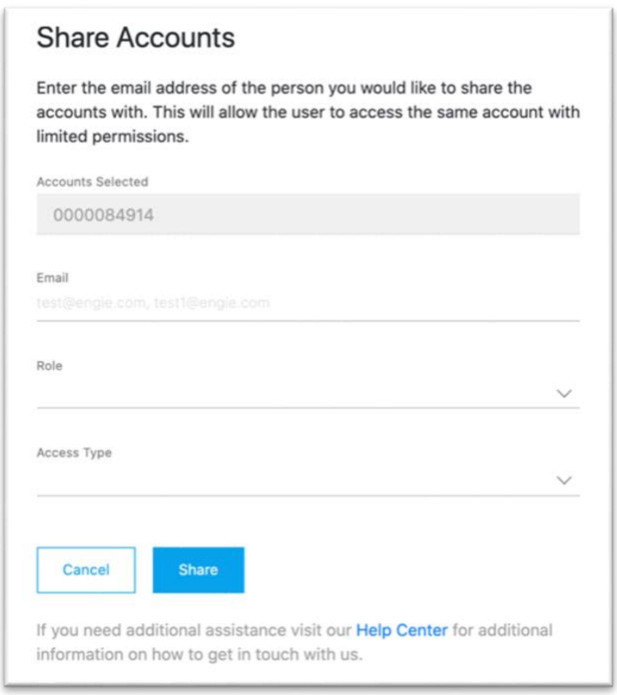


Share Account(s)

User 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.**

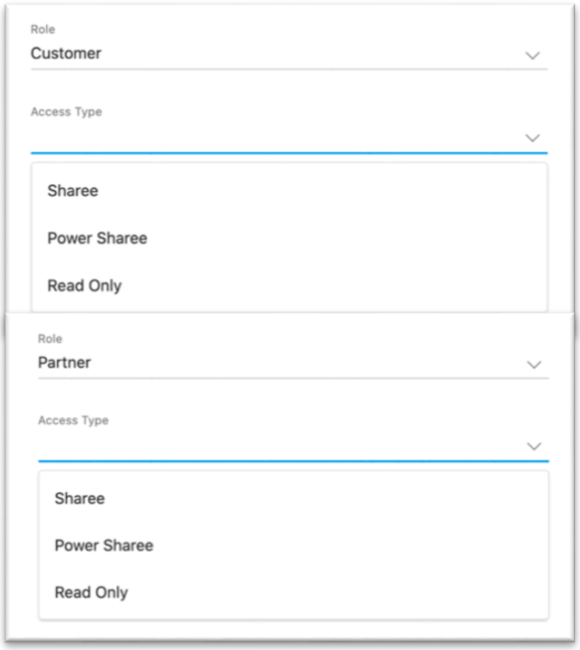




The **Share Accounts** screen will appear where you can enter one or more email address in which you want to share the specified account with.

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.



- 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.

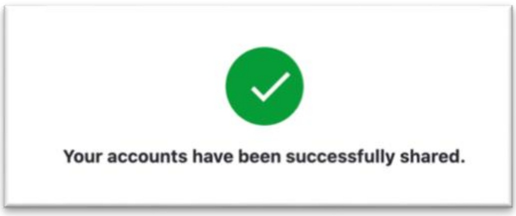
- Power Sharee

*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.

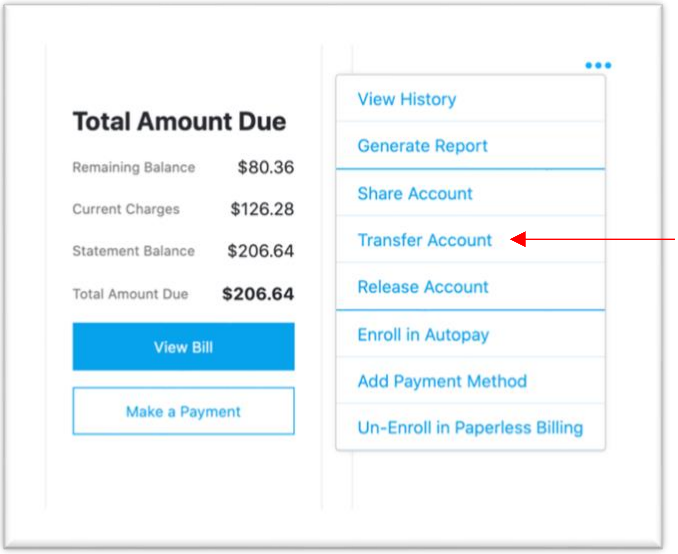
After selecting the Role and Access Type, Click **Share**. A message is displayed that the account(s) have been shared.

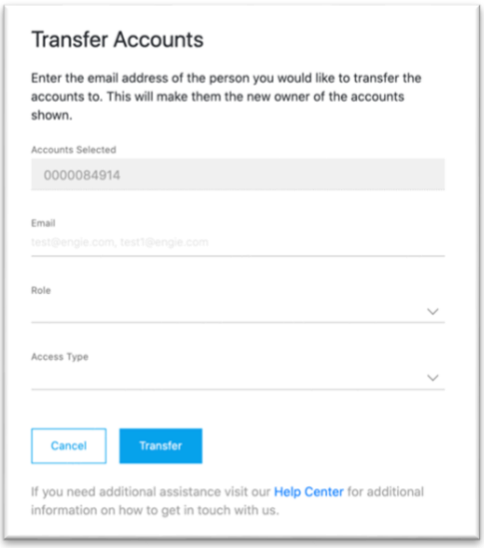


Transfer Account(s)

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.**





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

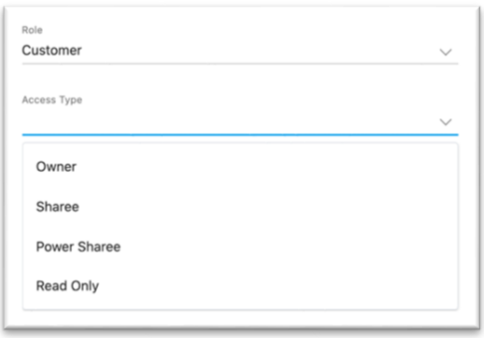
Under the **Role** dropdown, select **customer**. Under the **Access Type** dropdown there are 4 options to choose from.

- 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

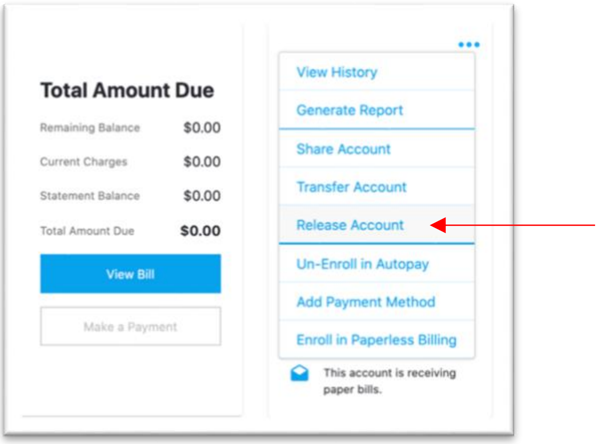
With Read Only access, a user can view all information pertinent to the account, however, they are only able to edit their user profile.

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

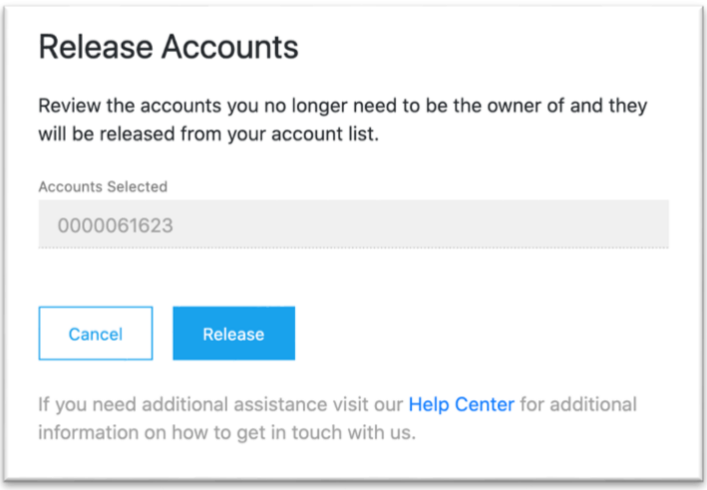
Release Account(s)

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.

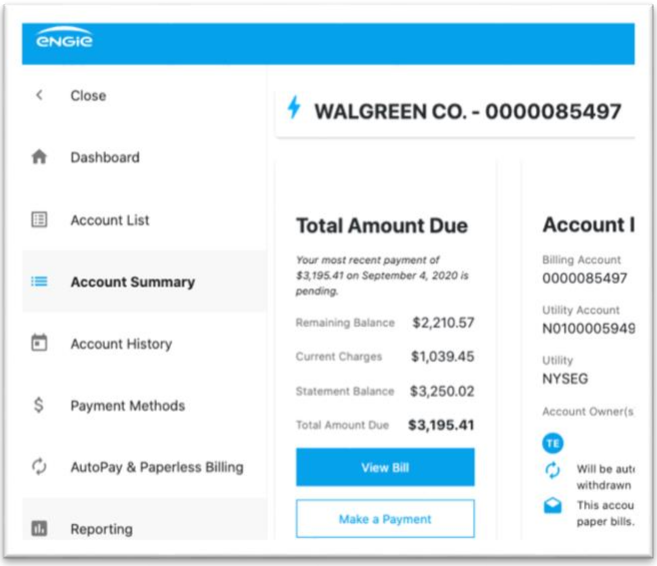
From the account detail view, click on the three blue horizontal dots on the right of the **Account Info** tile to display additional options. Select **Release Account.**



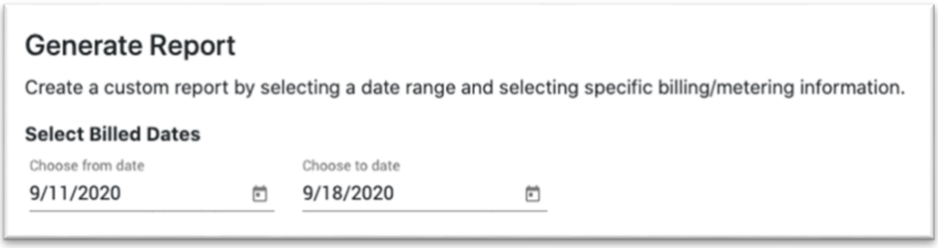
Click on **Release Account**. A new page will appear that shows the account(s) you would like to release. Click **Release** to continue. If the account has a status=dropped as well as zero balance your request will be successful and the account will be removed from your account list view.



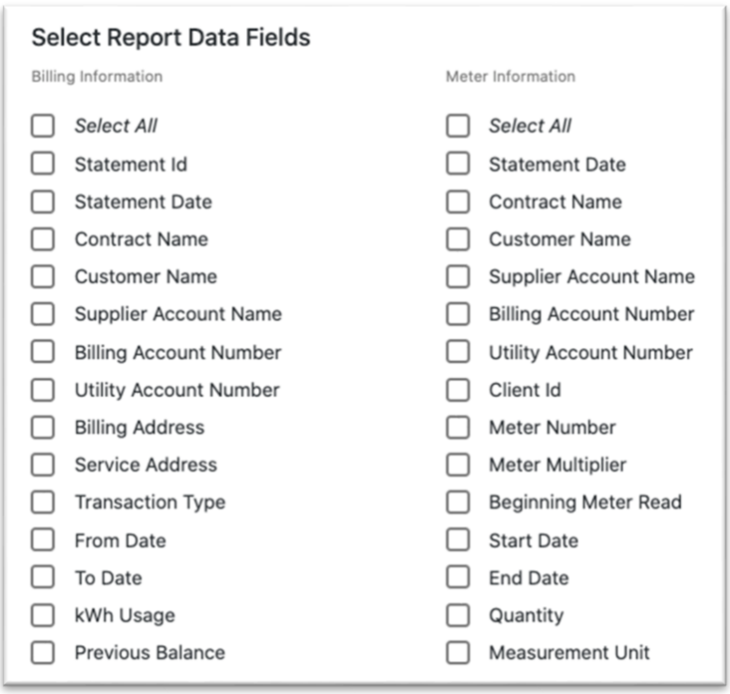
Generating a Report



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

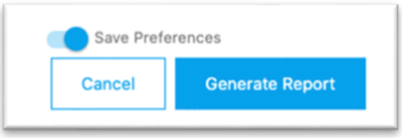


The **Generate Report** page displays a date range for the report. The page will default to the *To* billed date and the *From* billed date.



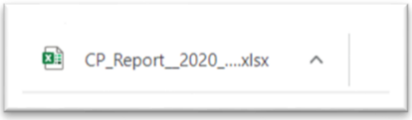
The page will display fields under two columns/sections: **Billing** and **Meter** information.

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

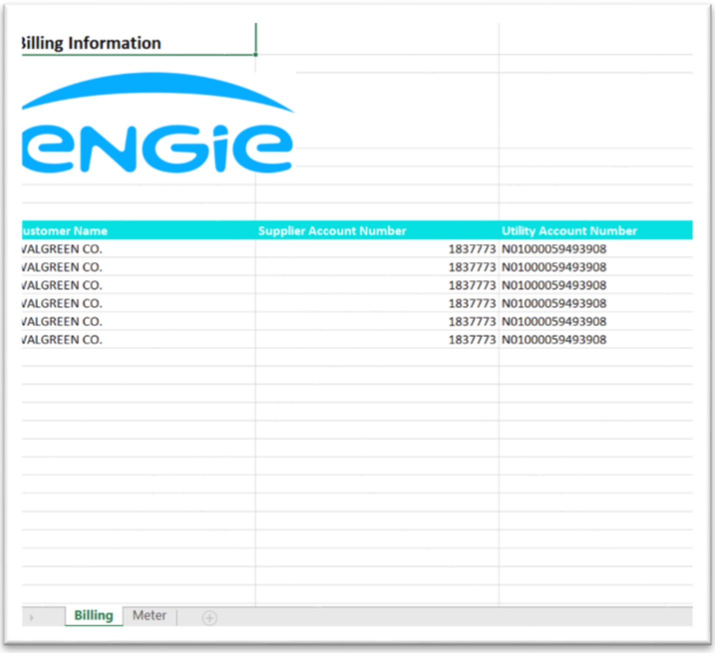


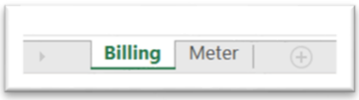
At the bottom of the page there is a toggle that you can turn on to save your preferences if you'd like to run the same report the next time you come into this page for the account.

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



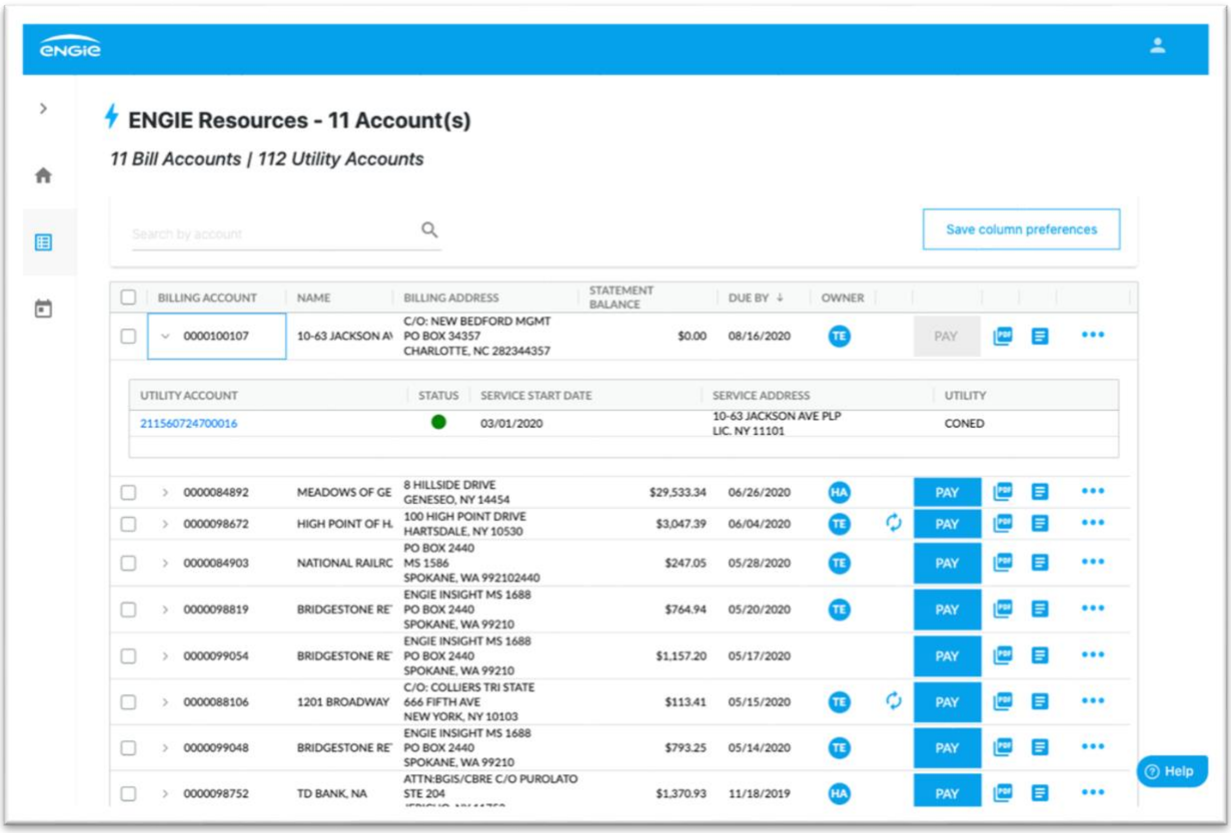
The excel file will have 2 tabs, one for **Billing Info** and one for **Meter Info**.





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

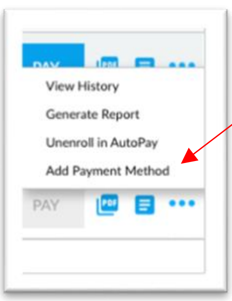
This view is when a user has summary bill accounts.

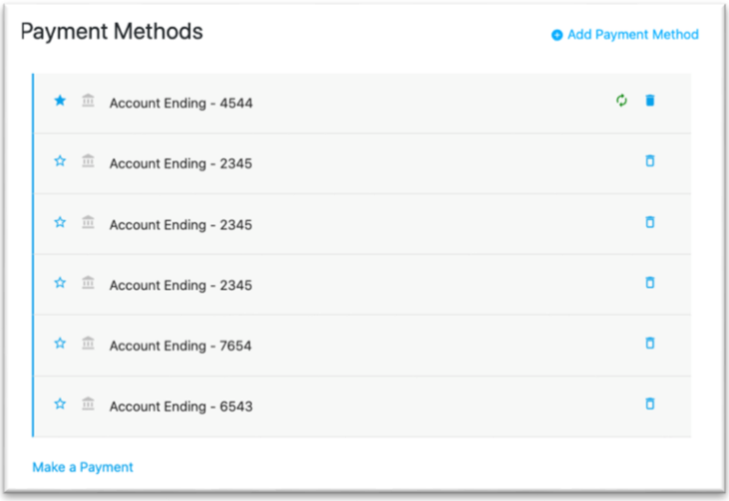


The list view is shown in a parent/child relationship. All of your Bill Accounts will be displayed with info pertaining to the Bill Account level. If you select the caret (right arrow) it will expand to show the Utility Account(s) associated with it.

Add/Delete a Payment Method: Scenario 1

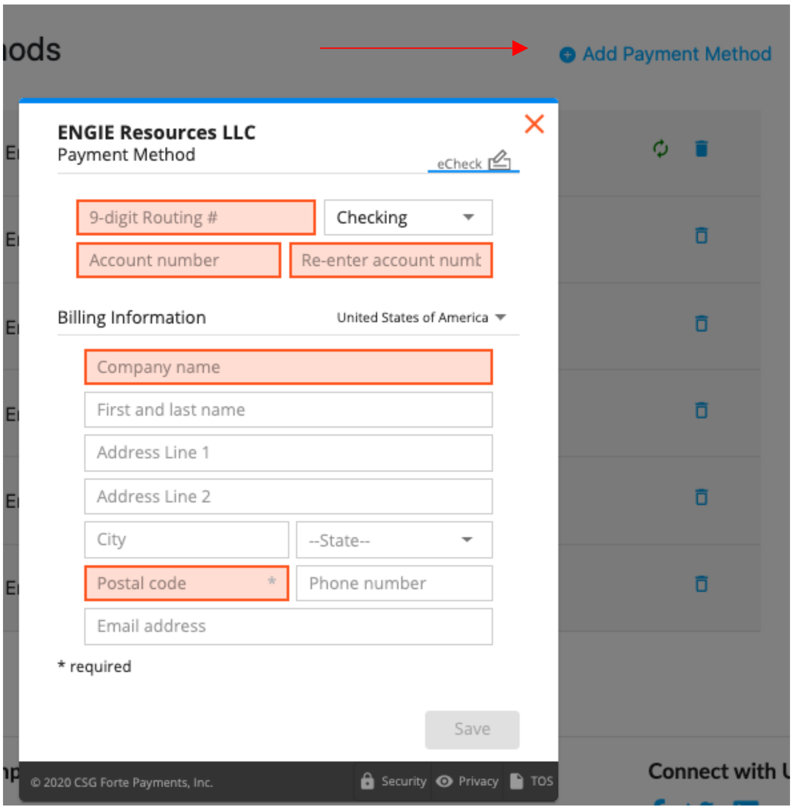
From your account list view, click on the three blue horizontal dots to display more options. Click on the **Add Payment Method** option.





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

Add Payment Method



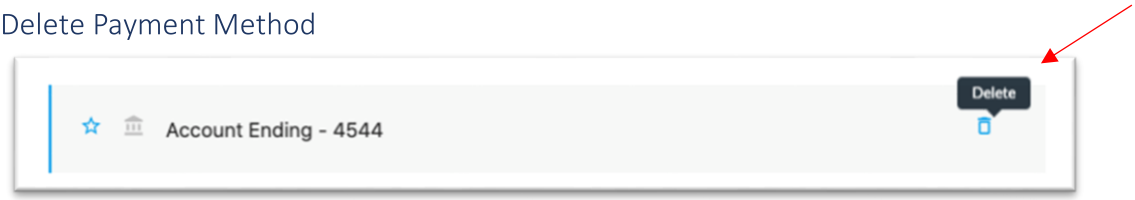
At the top right of the page there will be a **Add Payment Method** link.

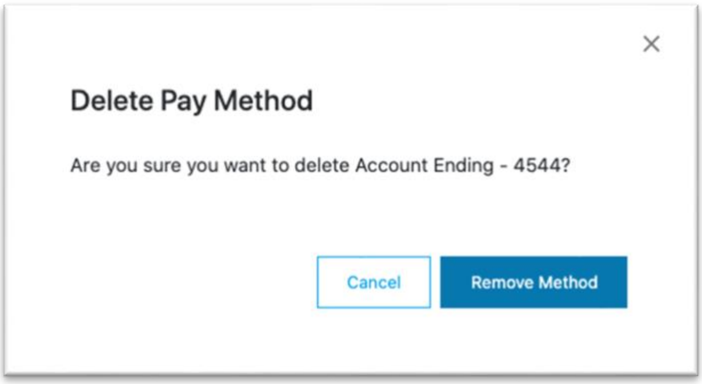
Select this to be taken to a pop up that will have you enter in payment information. Please note at this time payments can only be made from a checking or savings account.

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

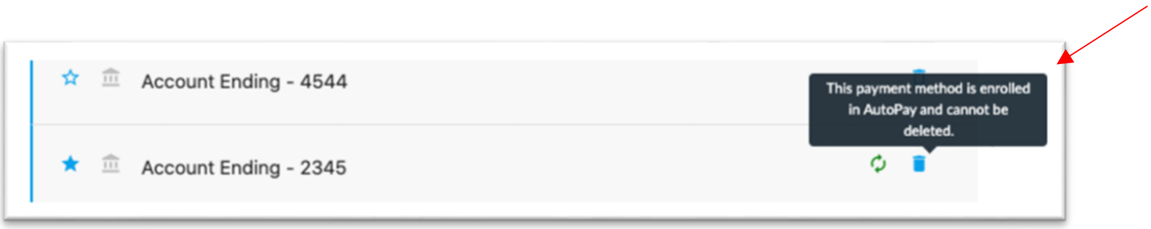
Click **Save**, and you will see a confirmation message that your payment method has been added.

Delete Payment Method





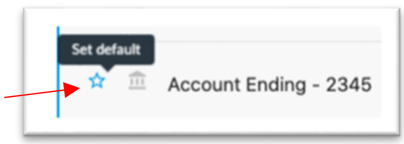
If you no longer need a payment method, you can remove it from the list. Click on the trash can icon to the right of the payment method to delete it. A pop up will appear asking you to confirm you want to delete the payment method. Click **Remove Method** to continue. The payment method will then be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

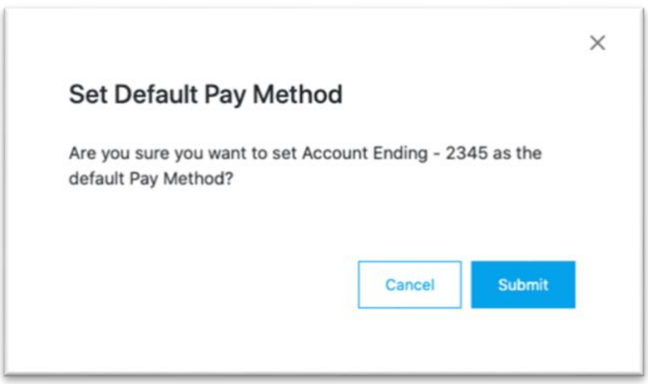


Please note that a payment **cannot** be deleted if it is the payment method that is enrolled in AutoPay. AutoPay is always tied to the default payment method. If you do want to delete a payment method that is associated with AutoPay, change the default payment method and it will tie AutoPay with that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

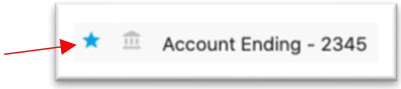
Default Payment Method

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

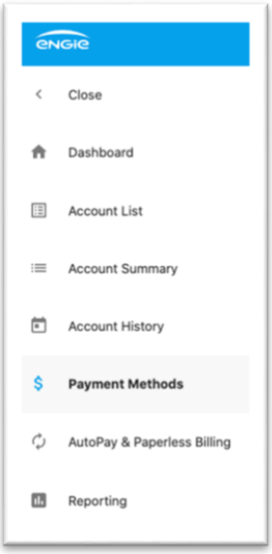




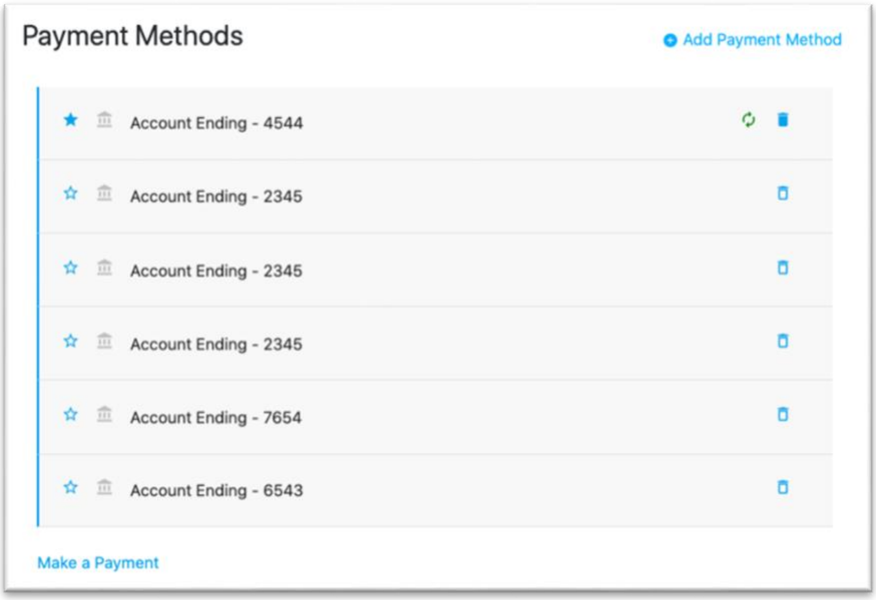
A pop up will appear, asking you to confirm you want to set it as the default pay method. Select **Submit** to continue. A blue star icon will now appear next to the new default pay method.



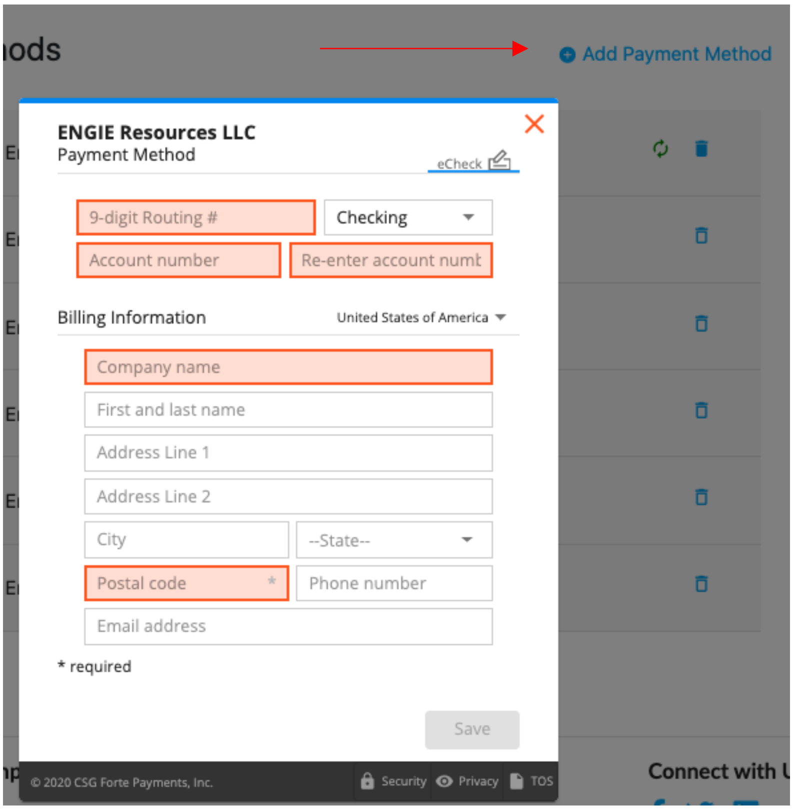
Add/Delete a Payment Method: Scenario 2



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



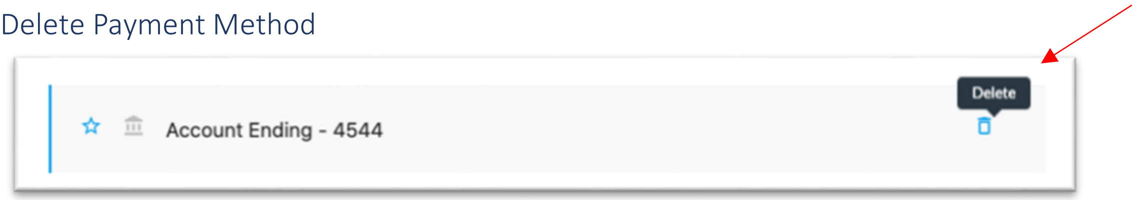
At the top right of the page there will be a **Add Payment Method** link.

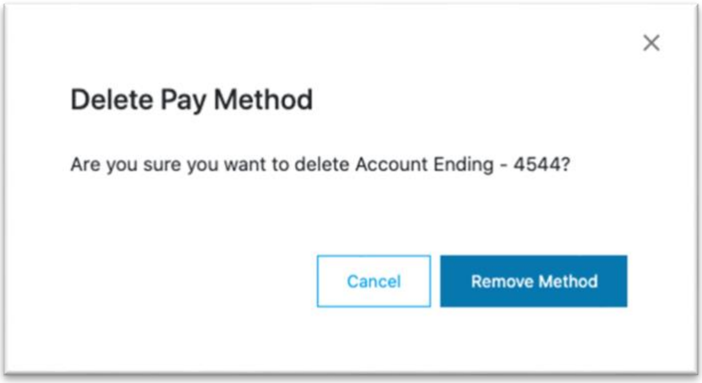
Select this to be taken to a pop up that will have you enter in payment information. Please note at this time payments can only be made from a checking or savings account.

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

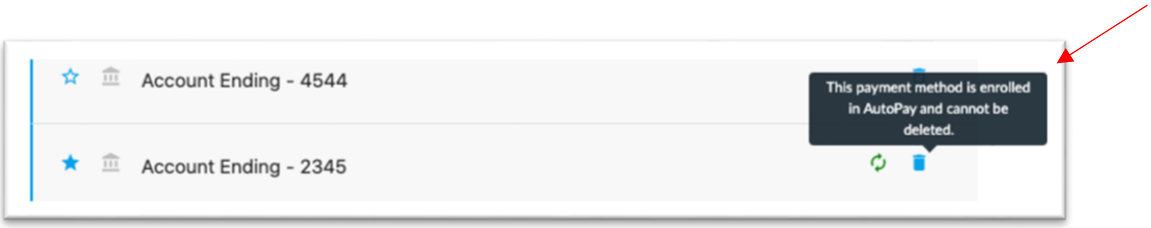
Click **Save**, and you will see a confirmation message that your payment method has been added.

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.



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Default Payment Method

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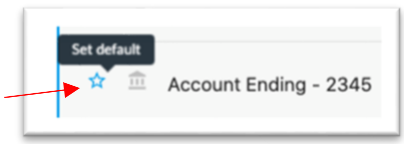
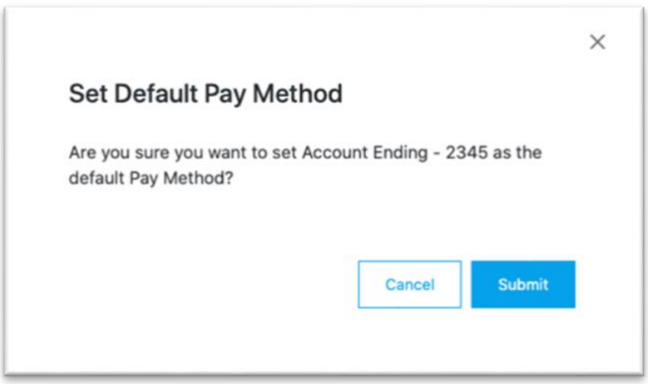
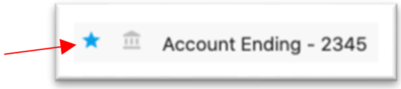




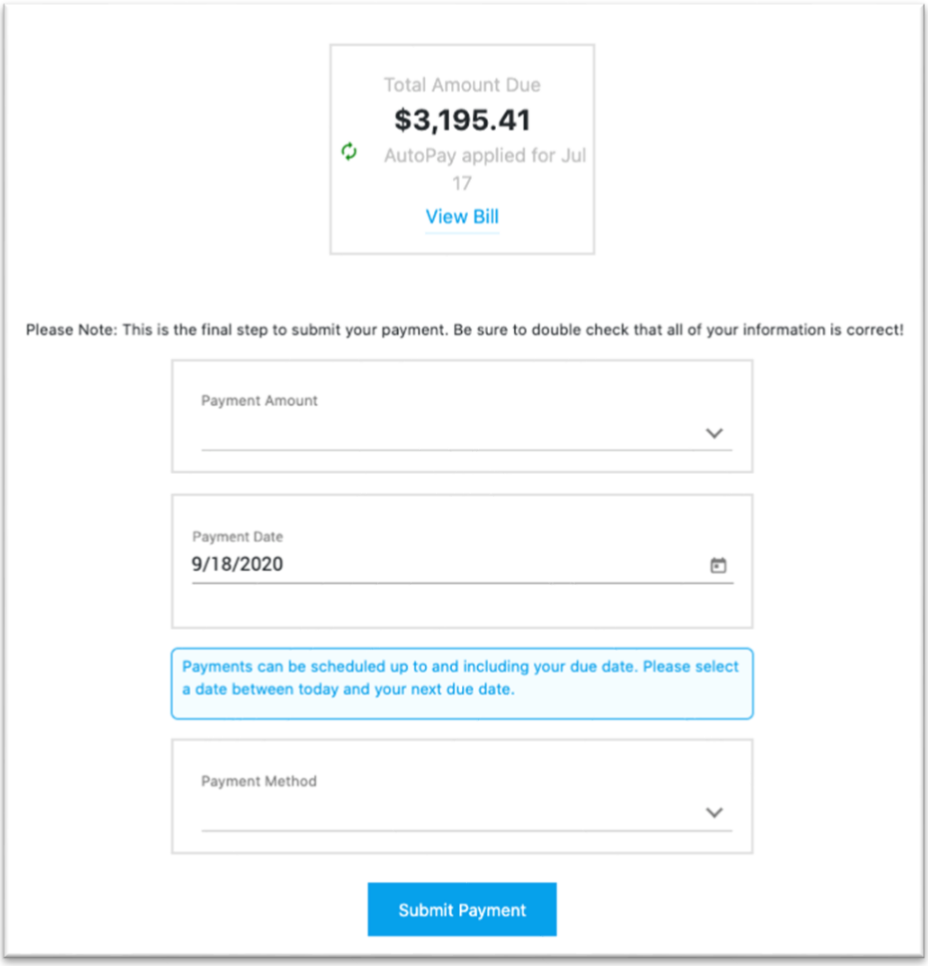
A pop up will appear, asking you to confirm you want to set it as the default pay method. Select **Submit** to continue. A blue star icon will now appear next to the new default pay method.

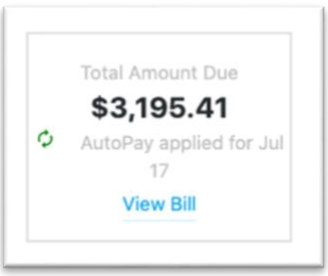


Make a Payment

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

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.



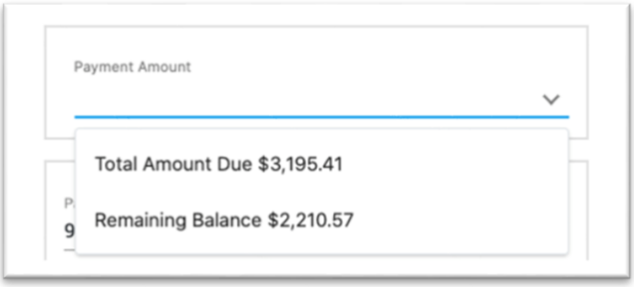


The top section will show your total amount due and if it is enrolled in AutoPay, a message will appear here to indicate that. You can still proceed even though you are enrolled in AutoPay if you want to make a one-time payment.

View Bill

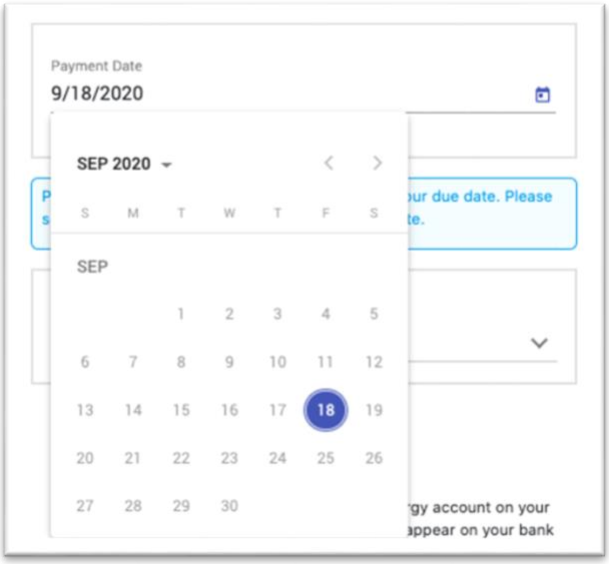
You can also view your bill you are paying on here. This will open up a PDF of the statement.

Payment Amount



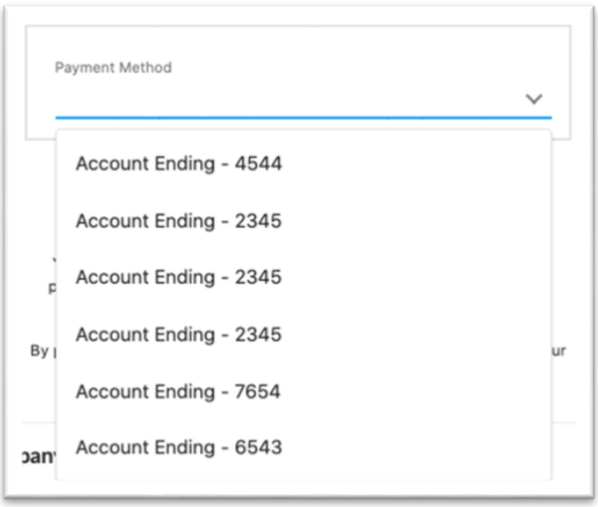
When clicking on the caret (down arrow), you will see the total amount due and the remaining balance.

Payment Date



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

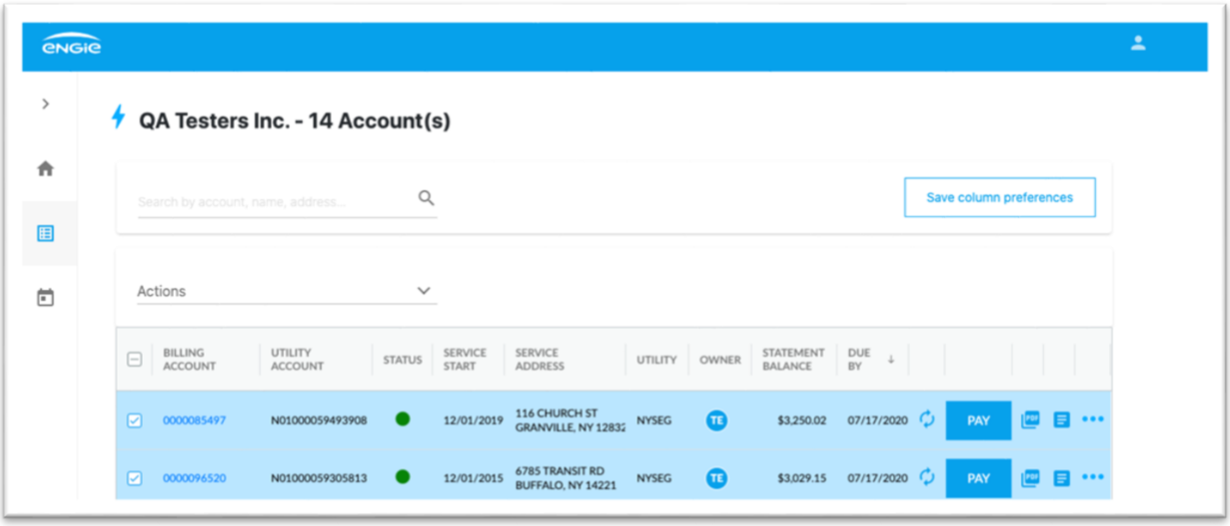
Payment Method



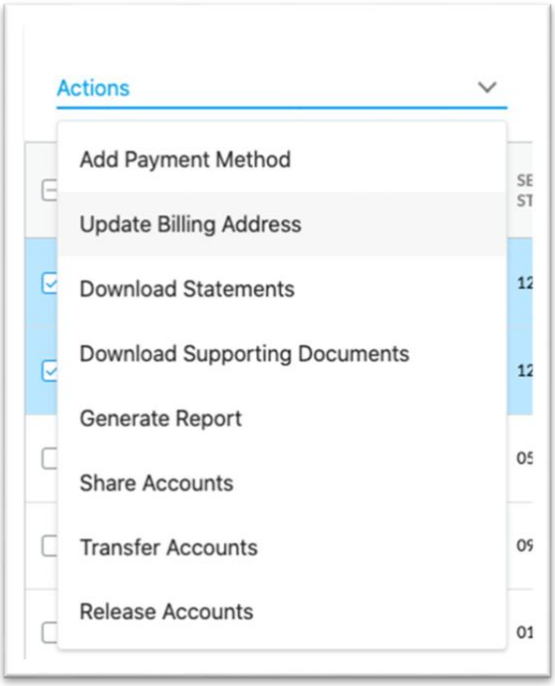
When clicking on the caret (down arrow), you will see all of your payment methods that have been added. Click on the payment method you would like to use, then click the **submit payment** button. You will receive a confirmation message saying that your payment has been made.

Update Billing Address for one or Multiple Accounts

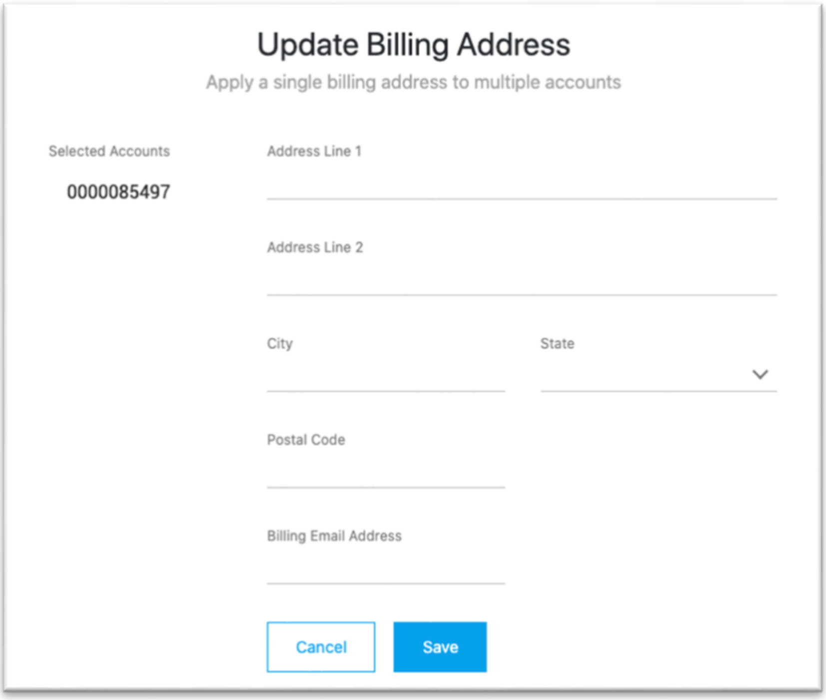
On the account list view, to the left of your accounts you will see a checkbox. Click on one or more checkboxes of the accounts you would like to update.



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

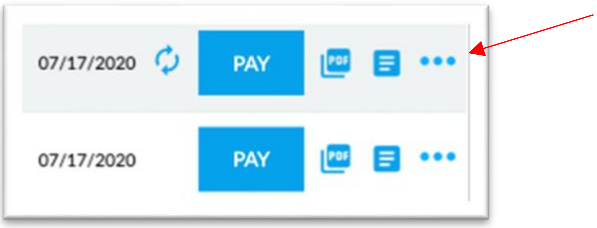


This will take you to the **Update Billing Address** page. Enter the information you would like updated, and press save. Once you go back to your account list view, the changes will be updated.

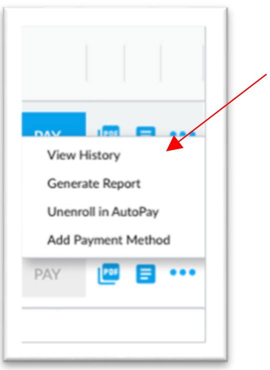


View Account History

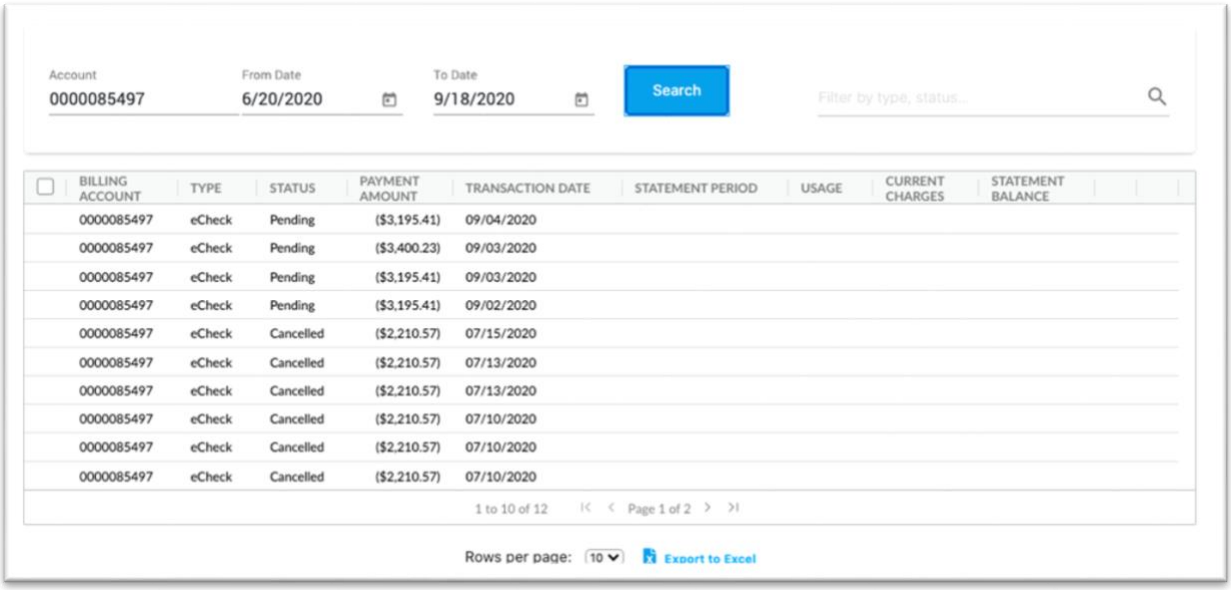
From your account list view, click on the three blue horizontal dots to display more options.



Click on the **View History** option.



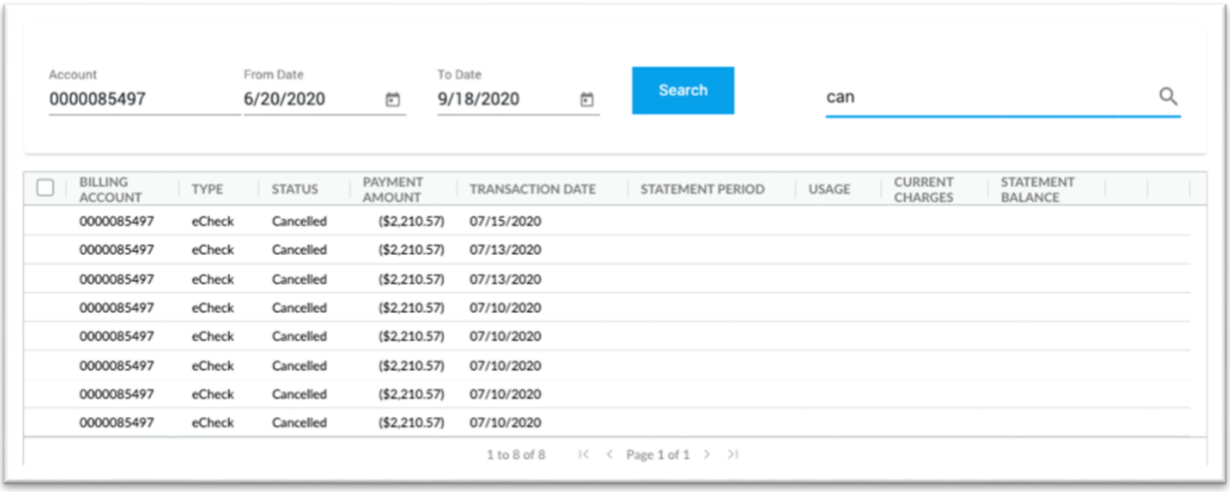
The account will default to the account you are on. You can then select the date range and press **Search**. This will then display all of your previous activity specific to the account you selected.



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				

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.



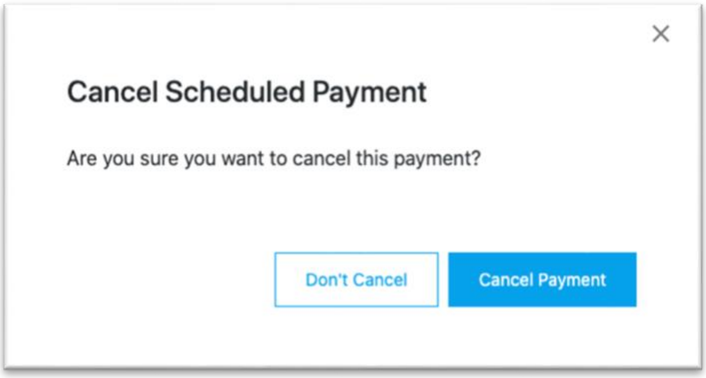
BILLING ACCOUNT	TYPE	STATUS	PAYMENT AMOUNT	TRANSACTION DATE	STATEMENT PERIOD	USAGE	CURRENT CHARGES	STATEMENT BALANCE
0000085497	eCheck	Cancelled	($2,210.57)	07/15/2020				
0000085497	eCheck	Cancelled	($2,210.57)	07/13/2020				
0000085497	eCheck	Cancelled	($2,210.57)	07/13/2020				
0000085497	eCheck	Cancelled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

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

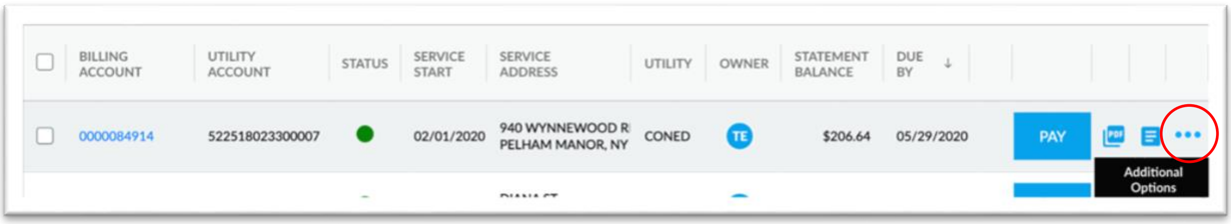
A confirmation modal appears. Click **Cancel Payment** to continue.



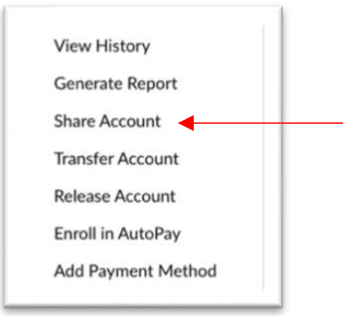
Share Account(s)

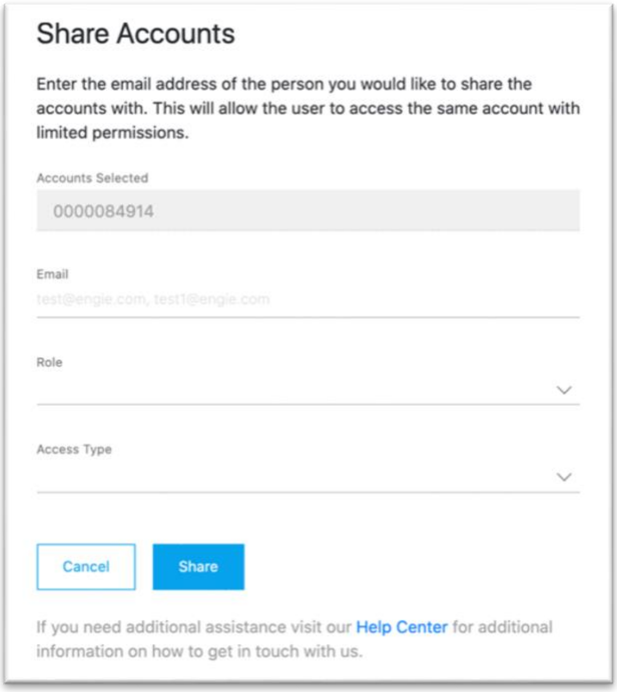
User this feature if you would like to share an account to another email/user and also have it on your account list view to access.

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



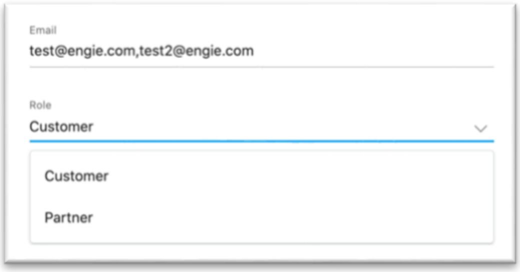
Select **Share Account** from the menu options.



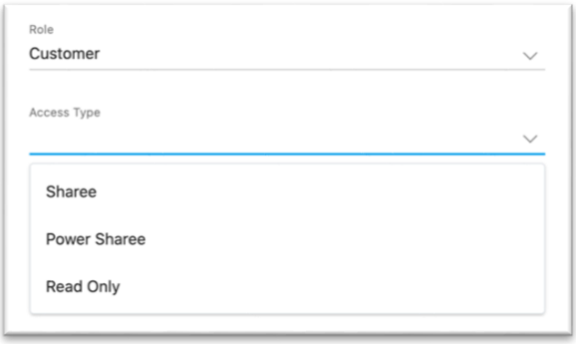


The **Share Accounts** screen will appear where you can enter one or more email address in which you want to share the specified account with.

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

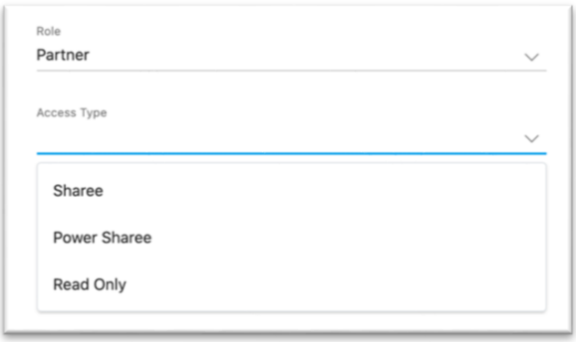


There are three different **Access Types** associated with both **Customer/Partner** Roles. Select the access type you would like the email to have permissions for.



- 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.



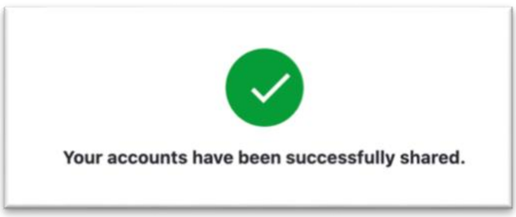
- Power Sharee

*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.

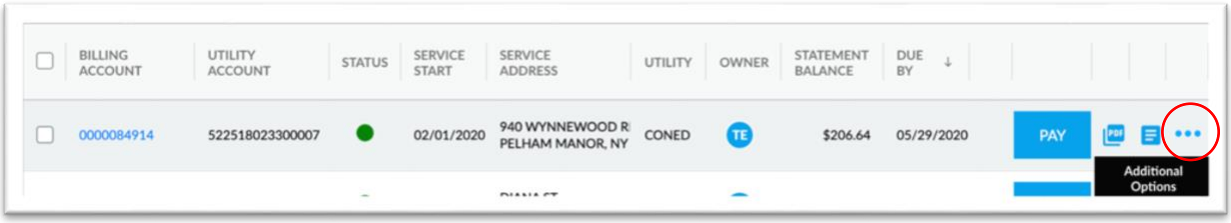
After selecting the Role and Access Type, Click **Share**. A message is displayed that the account(s) have been shared.

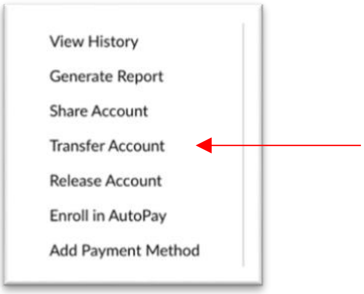


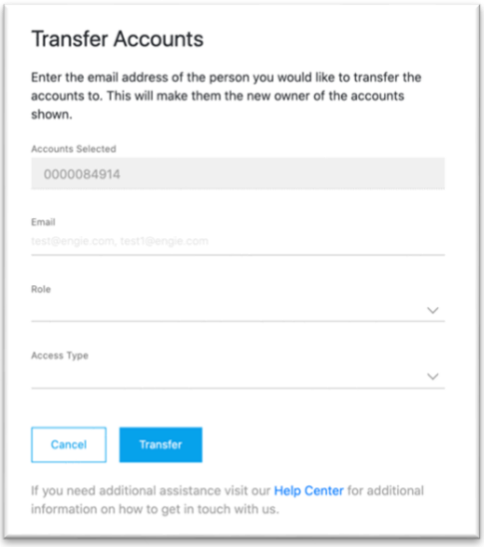
Transfer Account(s)

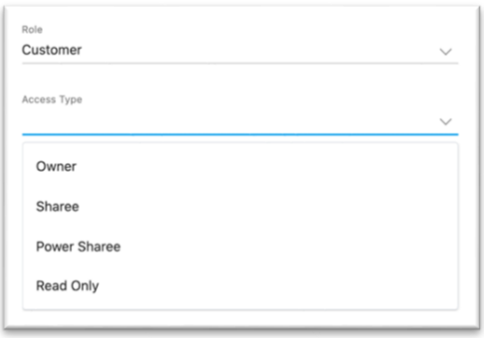
User this feature if you would like to transfer an account to another email/user and no longer have it on your account list view.

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









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.*

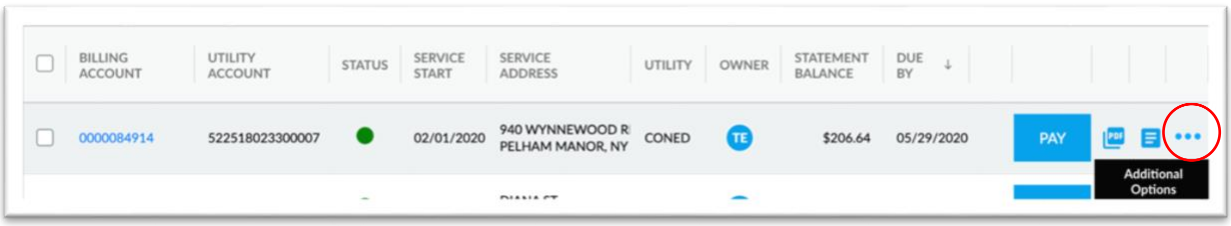
- Read Only
  With Read Only access, a user can view all information pertinent to the account, however, they are only able to edit their user profile.

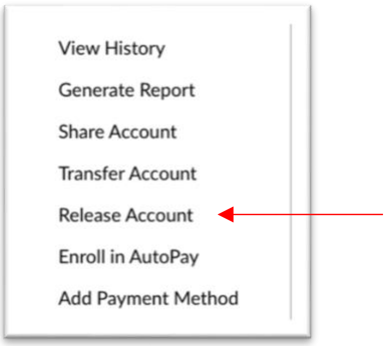
Once you have selected an **Access Type**, click **Transfer**. You will receive a success message.

Release Account(s)

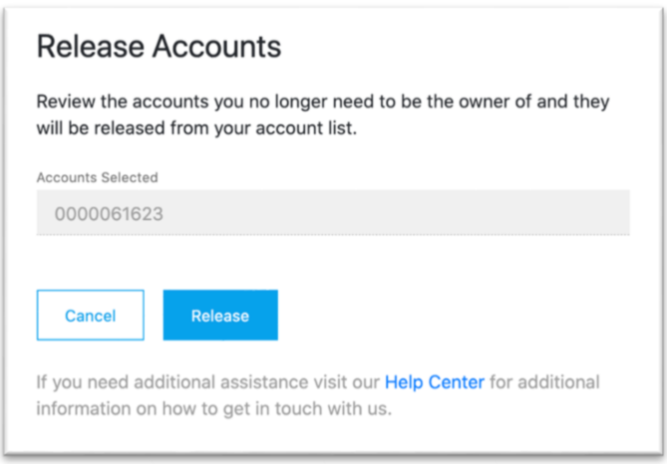
User this feature if you no longer need to be the owner of an account, and the account(s) will be released from your account list.

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



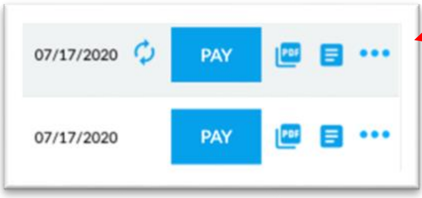


Click on **Release Account**. A new page will appear that shows the account(s) you would like to release. Click **Release** to continue. If the account has a status=dropped as well as zero balance your request will be successful and the account will be removed from your account list view.

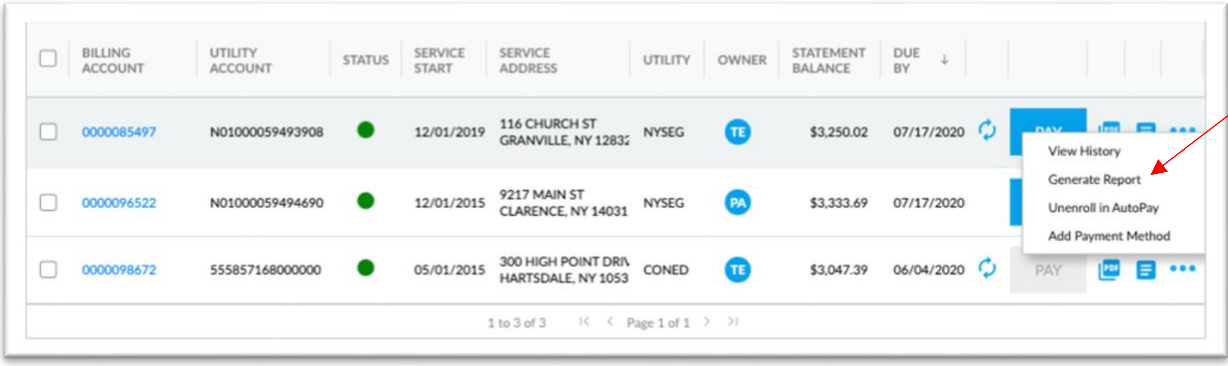


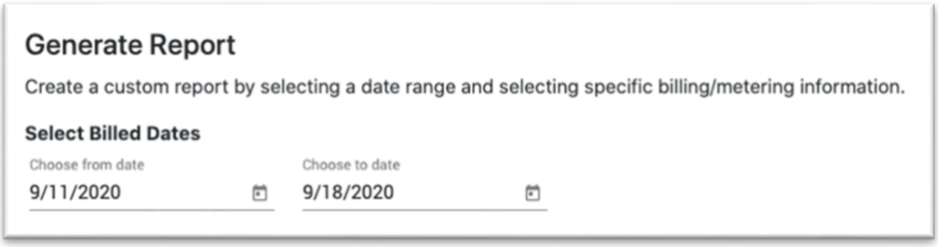
Generate Report

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

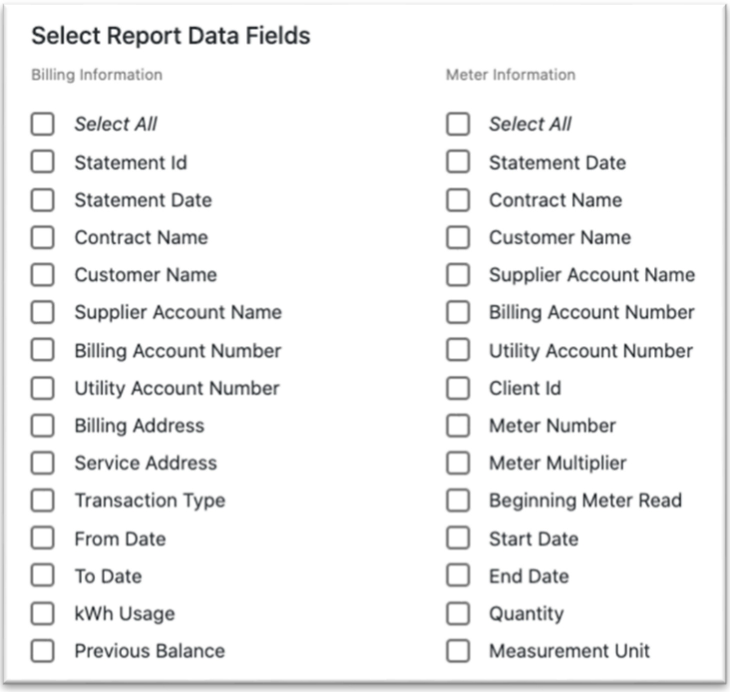


Click on the **Generate Report** option.



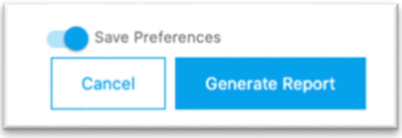


The **Generate Report** page displays a date range for the report. The page will default to the *To* billed date and the *From* billed date.



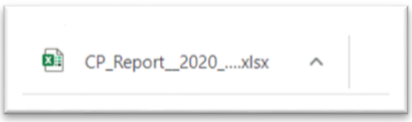
The page will display fields under two columns/sections: **Billing** and **Meter** information.

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

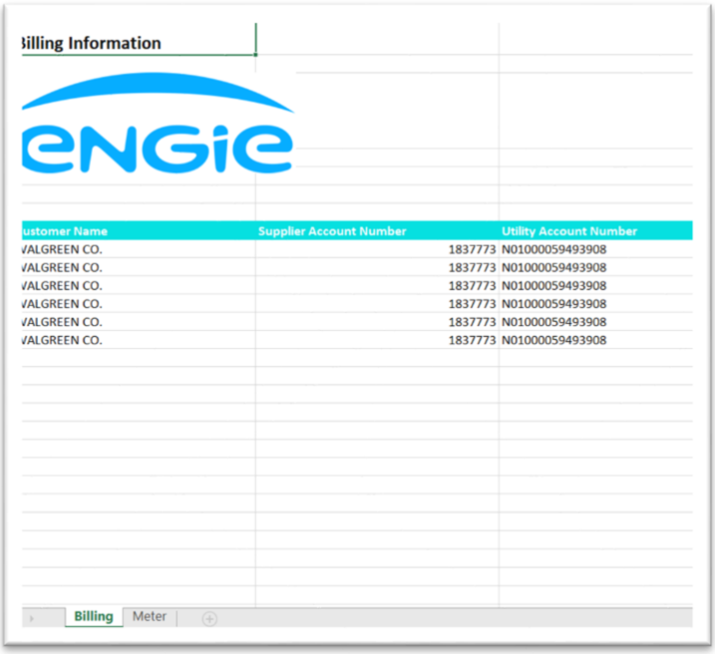


At the bottom of the page there is a toggle that you can turn on to save your preferences if you'd like to run the same report the next time you come into this page for the account.

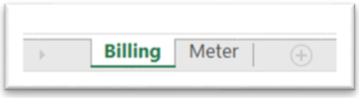
Click **Generate Report** and an Excel download will appear at the bottom of your browser.



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

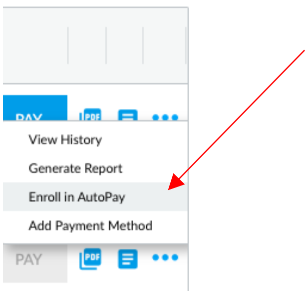


ustomer Name	Supplier Account Number	Utility Account Number
VALGREEN CO.	1837773	N01000059493908
VALGREEN CO.	1837773	N01000059493908
VALGREEN CO.	1837773	N01000059493908
VALGREEN CO.	1837773	N01000059493908
VALGREEN CO.	1837773	N01000059493908
VALGREEN CO.	1837773	N01000059493908

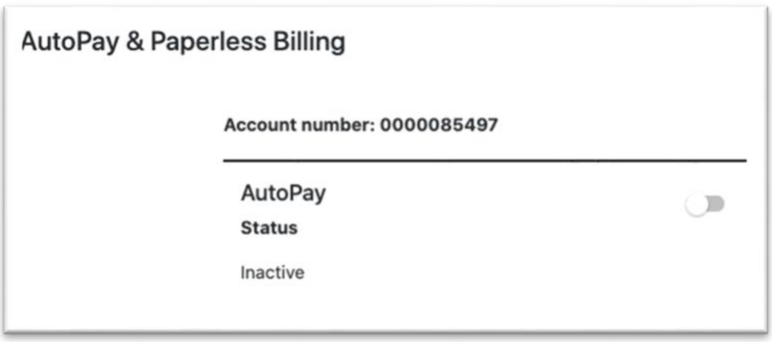


Enroll in AutoPay

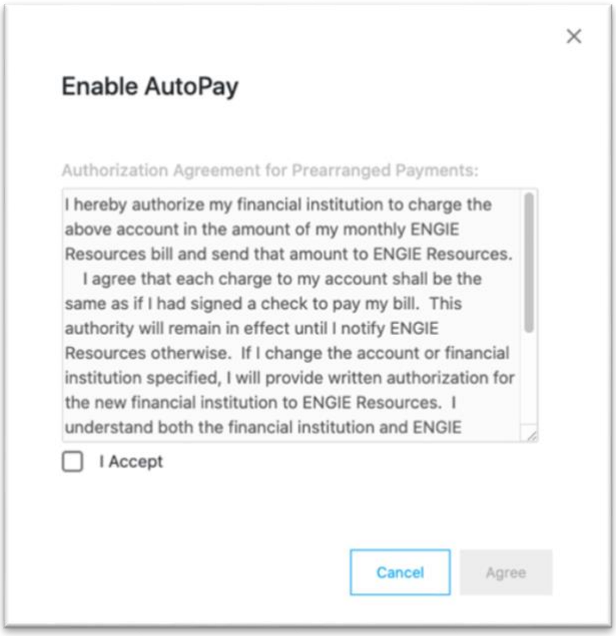
When you are on your account list view, click on the three horizontal blue dots at the right of the account you wish to enroll in AutoPay. If an account is enrolled in AutoPay, there will be a blue icon stating it is enrolled.



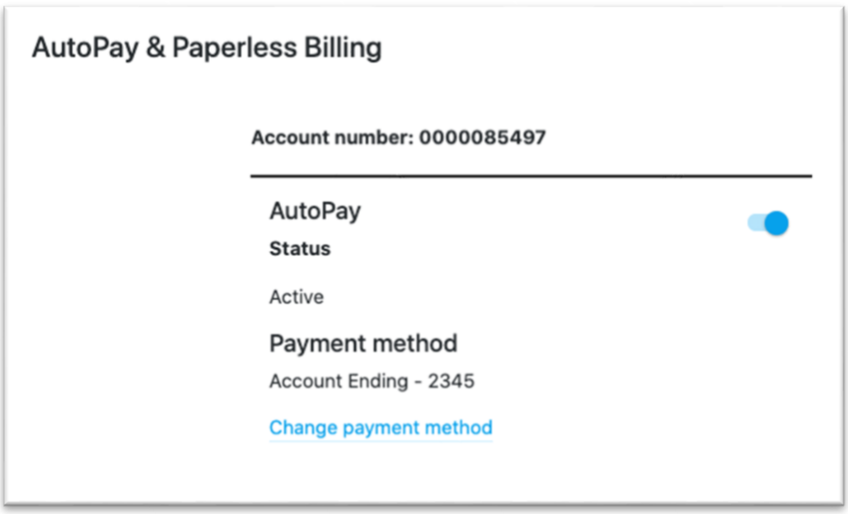
Click the option **Enroll in AutoPay**. This will take you to the **AutoPay & Paperless Billing** page for that specific account.



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.



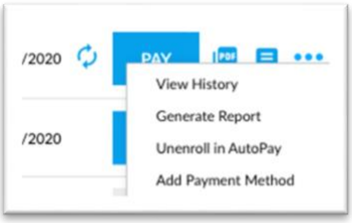
The toggle is now on and active with the default payment method used.



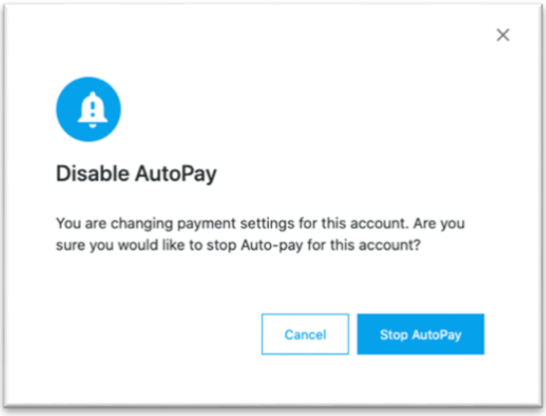
Un-Enroll in AutoPay

When you are on your account list view, click on the three horizonal 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.



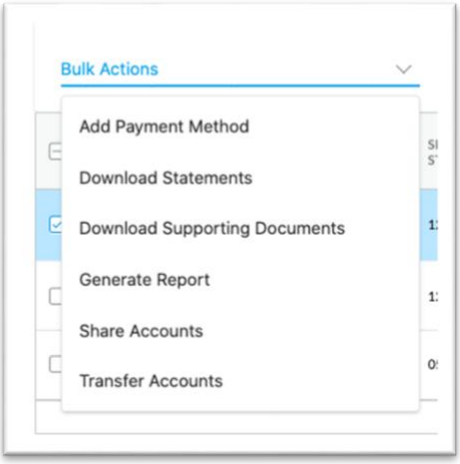
A confirmation pop up will display. Click **Stop AutoPay**.



The toggle is now off and the AutoPay is off.

Bulk Actions

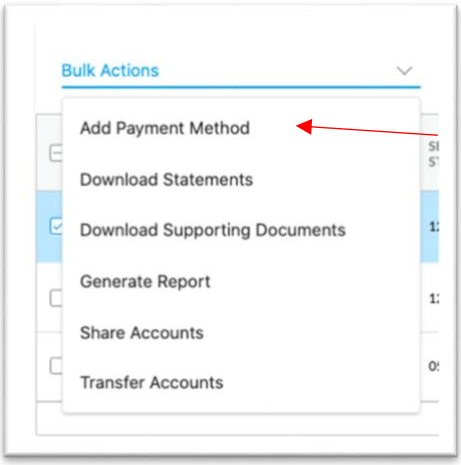
On the account list view, to the left of your accounts you will see a checkbox. Click on one or more checkboxes and a dropdown named **Actions** will appear.



You can select from multiple options:

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

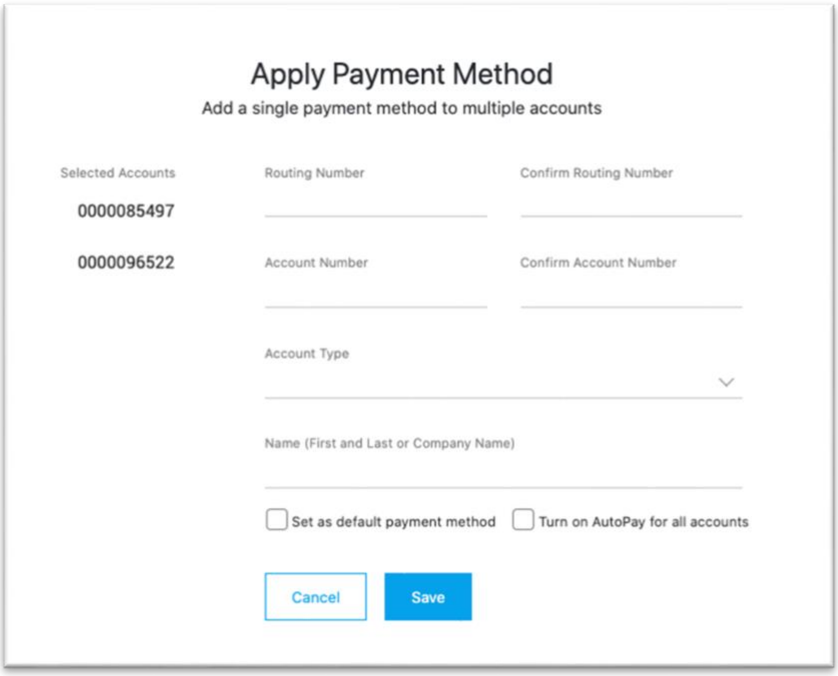
On the account list view, to the left of your accounts you will see a checkbox. Click on one or more checkboxes and a dropdown named **Actions** will appear. Click on **Apply Payment Method**.



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.

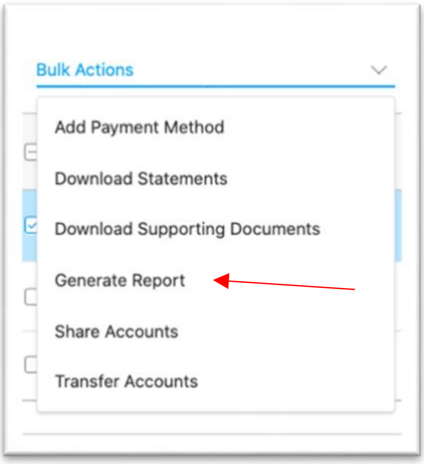
Next, fill out all of the payment information. If you would like to set this payment method as the default payment method for the selected accounts, select the checkbox at the bottom.

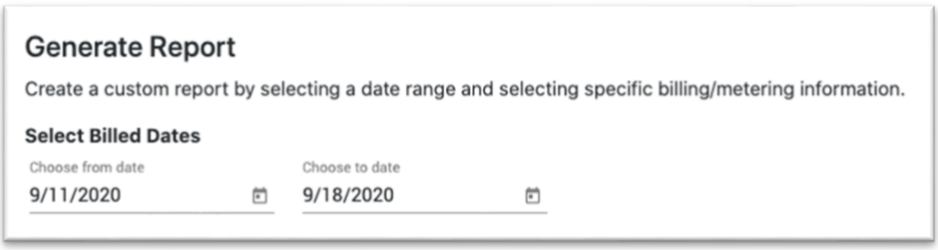
Also, If you would like to turn on AutoPay for those selected accounts, select the second box **Turn on AutoPay for all accounts**.



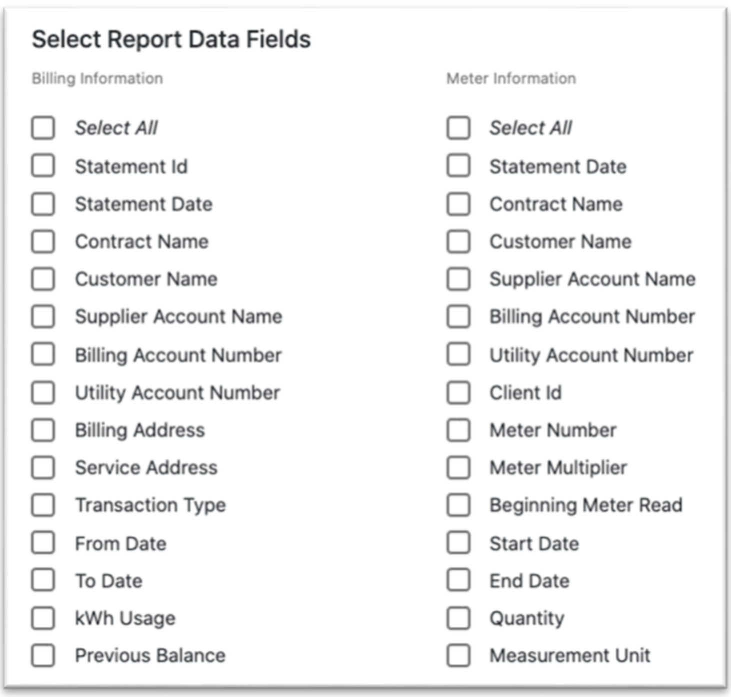
Bulk Generate Report – Generate a Report for Multiple Accounts

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**.



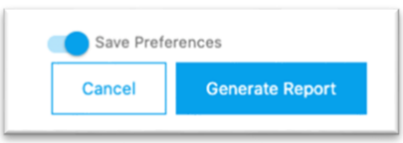


The **Generate Report** page displays a date range for the report. The page will default to the *To* billed date and the *From* billed date.



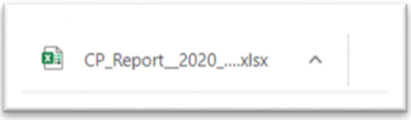
The page will display fields under two columns/sections: **Billing** and **Meter** information.

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

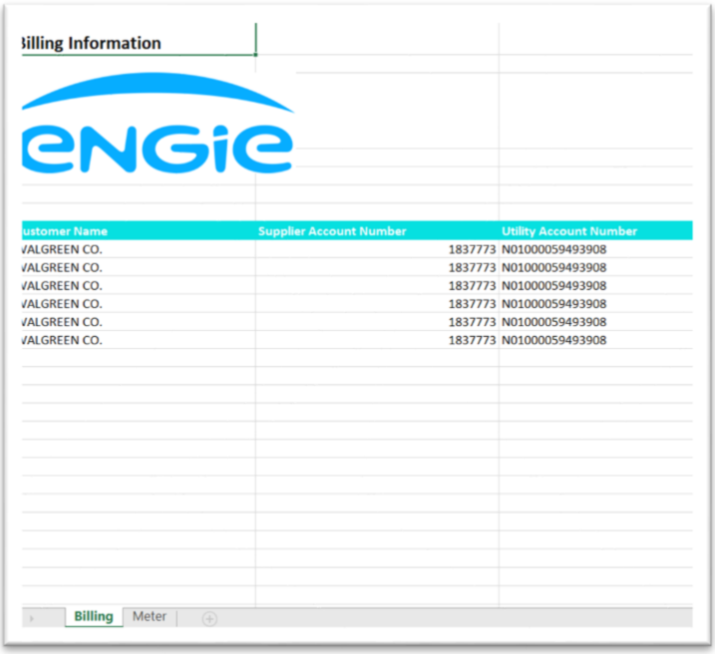


At the bottom of the page there is a toggle that you can turn on to save your preferences if you'd like to run the same report the next time you come into this page for the account.

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**.

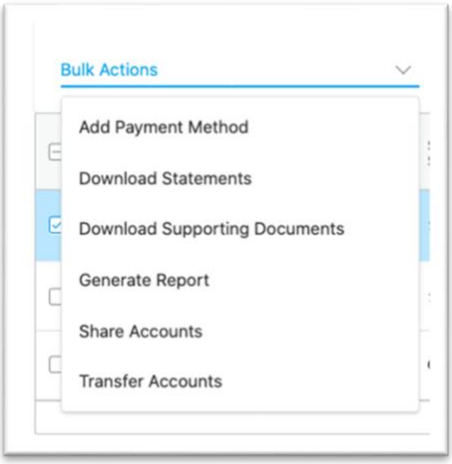


ustomer Name	Supplier Account Number	Utility Account Number
VALGREEN CO.	1837773	N01000059493908
VALGREEN CO.	1837773	N01000059493908
VALGREEN CO.	1837773	N01000059493908
VALGREEN CO.	1837773	N01000059493908
VALGREEN CO.	1837773	N01000059493908
VALGREEN CO.	1837773	N01000059493908

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

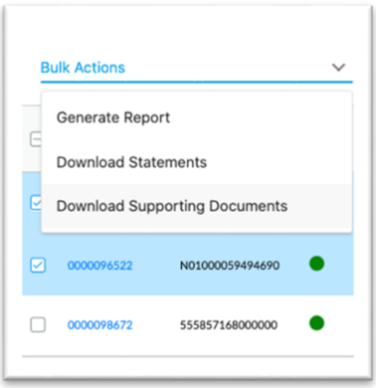
On the account list view, to the left of your accounts you will see a checkbox. Click on one or more checkboxes and a dropdown named **Actions** will appear. Click **Download Statements**. At the bottom of the browser the PDF's will appear.

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
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

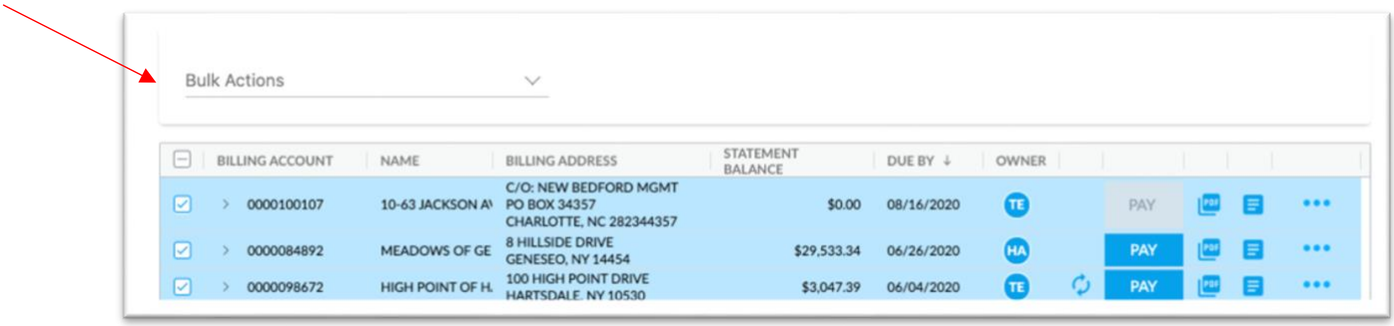


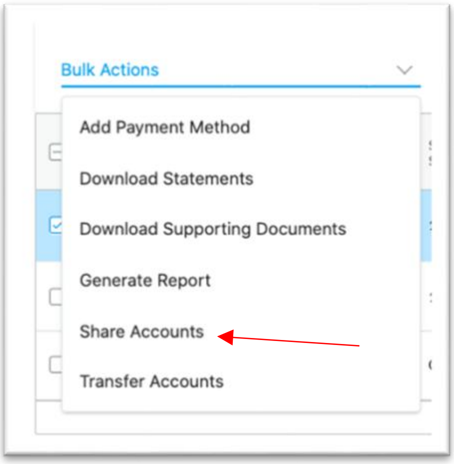
Bulk Download Supporting Documents – Download Supporting Documents for Multiple Accounts

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.

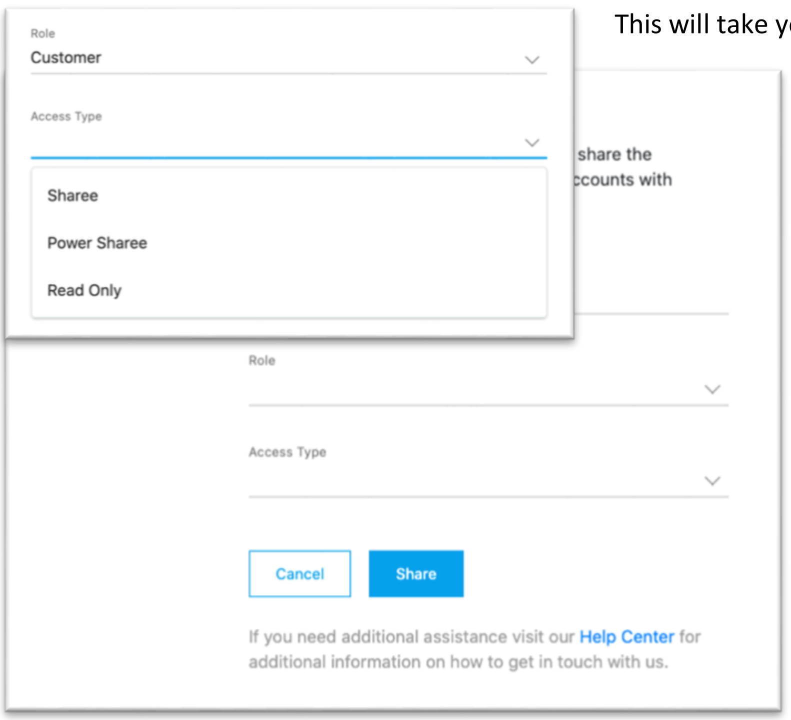


Bulk Share Accounts – Share Multiple Accounts at Once





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 **Share Accounts.**



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.

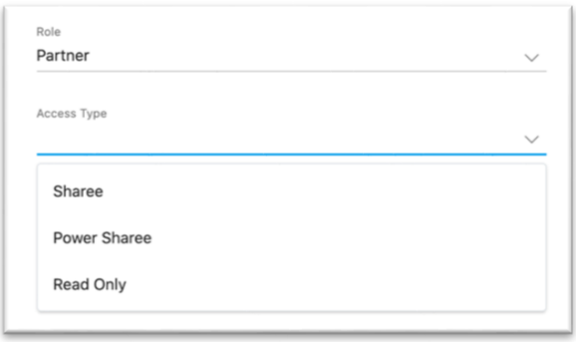
Select the access type you want them to receive.

- 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.*



- Read Only

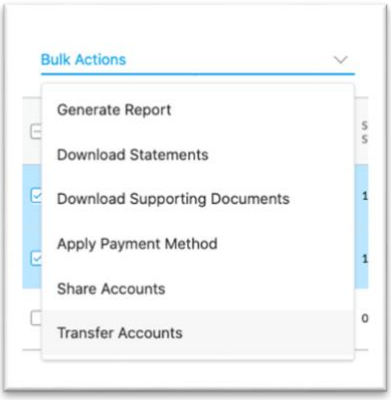
With Read Only access, a user can view all information pertinent to the account, however, they are only able to edit their user profile.

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

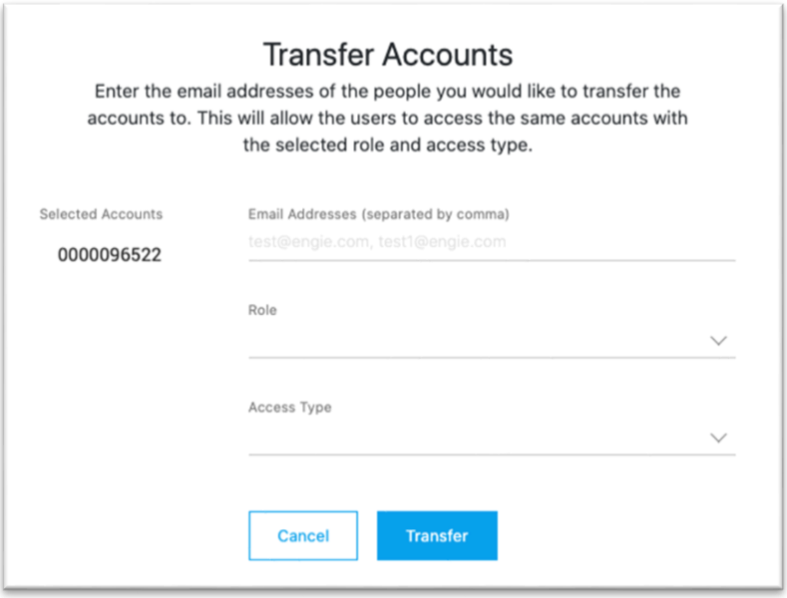
Bulk Transfer Accounts – Transfer Multiple Accounts at Once

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.**



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



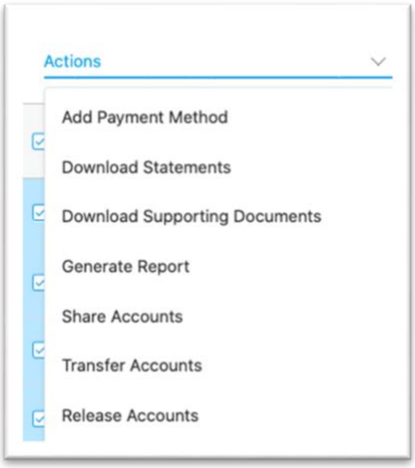
On the left you will see a list of the **selected accounts** you will be applying the change to. Please note that if you do not have permissions to transfer certain accounts, it will not display on the left.

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.**



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.