



MY ENGIE PORTAL GUIDE

For Customers

Updated Dec 6, 2024

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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 link into your browser:

[https://accounts.engieresources.com/user/activate/3d8432ef-7e4c-4acc-8e81-336b8172a5ea/k\[redacted\]jie.com](https://accounts.engieresources.com/user/activate/3d8432ef-7e4c-4acc-8e81-336b8172a5ea/k[redacted]jie.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.

Finish setting up your account

Email Address

[redacted]@engie.com

First Name

Preferred or Nickname

Last Name

Company Name

Create Password



Your password must be at least 8 characters in length.

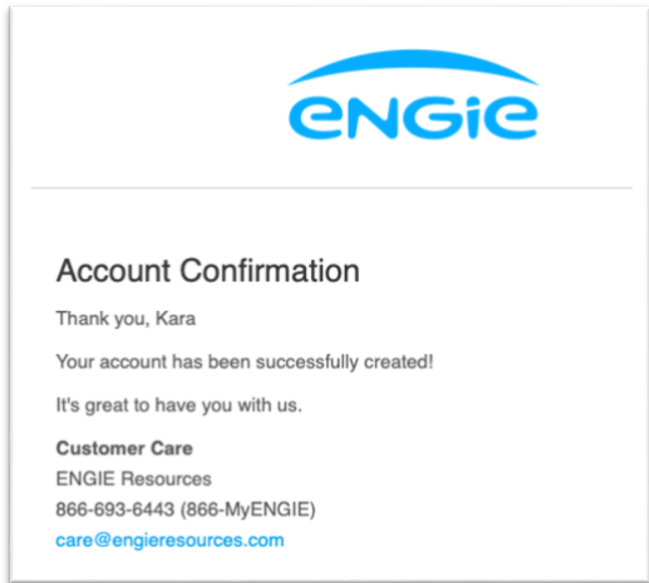
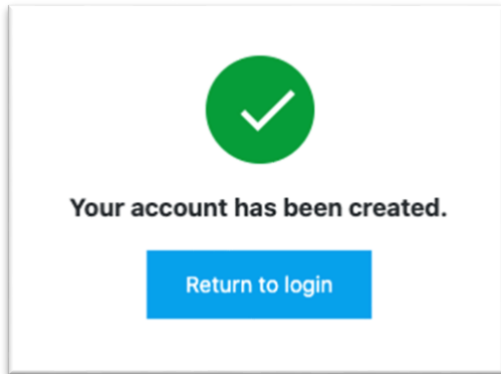
Confirm Password



Submit

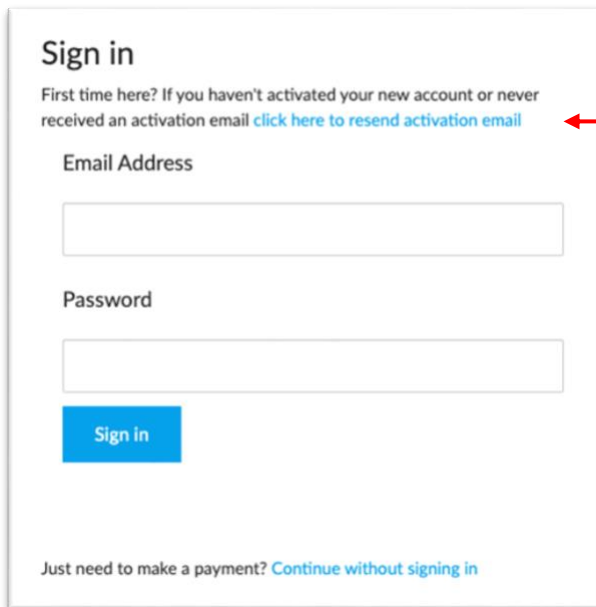
By creating an account, you agree to our Terms and Conditions and Privacy Policy.

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



Didn't receive an activation email?

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



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

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

Resend activation email

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

Email Address
:@engie.com

[Confirm](#) [Return to sign in](#)

Resend activation email

Email Address

[Confirm](#) [Return to sign in](#)

Guest Payment (Pay without signing in)

If you wish to make a one-time payment without signing into your account, you can do so on the **Sign in** page under the **Sign in** button. Click the link *Just need to make a payment? [Click here to pay without signing in.](#)*

Sign in

First time here? If you haven't activated your account or didn't receive your activation key via email, check your junk mail or spam folder or [click here](#) to resend your activation key.

Email Address

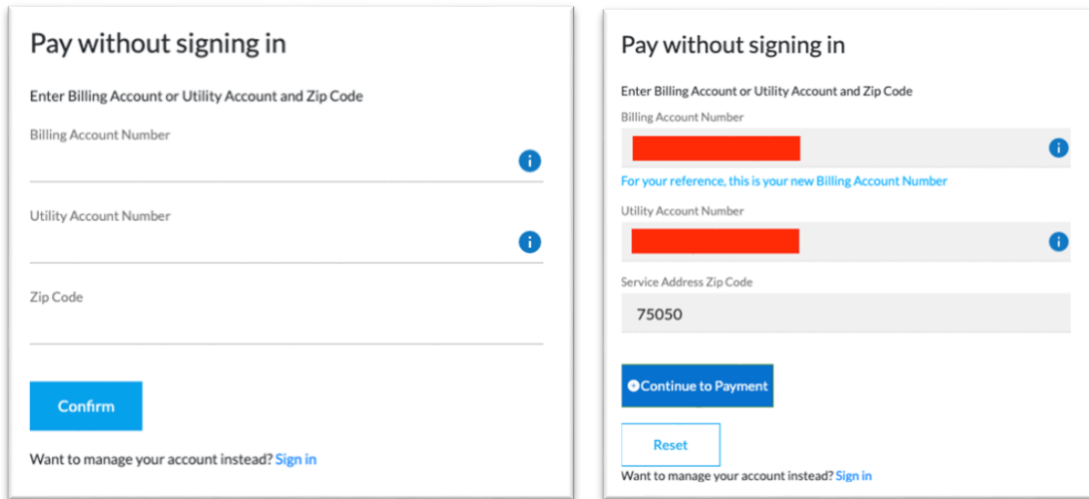
Password [Forgot your password?](#)

Keep me signed in

[Sign in](#)

Just need to make a payment? [Click here to pay](#) without signing in.

Enter either your **Billing Account Number** or **Utility Account Number** and associated Zip Code and click **Confirm**.




If both the Account Number and Zip Code match you will be able to proceed by clicking **Continue to Payment**.

Guest Payment (ACH)

A payment modal will appear for you to enter all the details. If you are making an ACH payment, click the **eCheck** tab at the top of the modal.

Fill out all the details and the button at the bottom will turn green. Click **Next**. You then will see your payment information. Select which amount you would like to pay: Current Charges, Statement Balance, or Current Balance. Select **Next**. You will then see the total amount being charged. Click **Authorize** to submit the payment. You will see a **Success** confirmation modal appear with all details including the confirmation number to reference back to.

ENGIE Resources LLC ✕
Payment Information Edit


 TESTER
Account Ending - [REDACTED]
RTN # [REDACTED]

Amount Summary

Current Charges (\$47.16)
 Statement Balance (\$47.16)
 Current Balance (\$47.16)

[Next](#)

ENGIE Resources LLC ✕
Payment Information Edit

 TESTER
Account Ending [REDACTED]
RTN # [REDACTED]

Amount Summary Edit

Amount: \$47.16

This site is protected by reCAPTCHA and the Google
Privacy Policy and Terms of Service apply.



[Authorize](#)

Guest Payment (Credit Cards – Texas Customers Only)



A payment modal will appear for you to enter all the details. If you are making an ACH payment, click the **Card** tab at the top of the modal.

Please Note: There is a service fee of 4% for credit cards. We support Mastercard, American Express, and Discover Card.

ENGIE Resources LLC
Payment Method

Card  eCheck 

XXXX XXXX XXXX XXXX MM YYYY CV

  DISCOVER

Billing Information United States of America ▼

Company name *

First and last name *

Postal code *


* required (only one name field is required)

Next

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Fill in the Credit Card Number, Expiration Date (2 digits for the month and 4 digits for the year) and the Billing Information. Once all fields are filled out correctly, the **Next** button will enable and turn green. Click **Next**.

ENGIE Resources LLC
Payment Information Edit

 **ENGIE**
Mast Credit Card - 7109
Exp. 03/2024

Amount Summary

Current Charges (\$47.16)

Statement Balance (\$47.16)

Current Balance (\$47.16)

Next


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You then will see your payment information. Select which amount you would like to pay: Current Charges, Statement Balance, or Current Balance. Select **Next**.

This is the final screen before authorizing payment. Review your credit card information and the Account Summary section which includes the service fee amount. Click **Authorize** to make the payment.

ENGIE Resources LLC ✕

Payment Information Edit

 **Tester**
Tester Account
Mast Credit Card - 7109
Exp. 03/2024

Amount Summary Edit

Sub-Total:	\$47.16
Service Fee:	\$2.00
Amount:	\$49.16


This site is protected by reCAPTCHA and the Google [Privacy Policy](#) and [Terms of Service](#) apply.

Authorize

© 2021 CSG Forte Payments, Inc. Security Privacy TO

You will see a **Success** confirmation modal appear with all details including the confirmation number to reference back to.

✕



Success

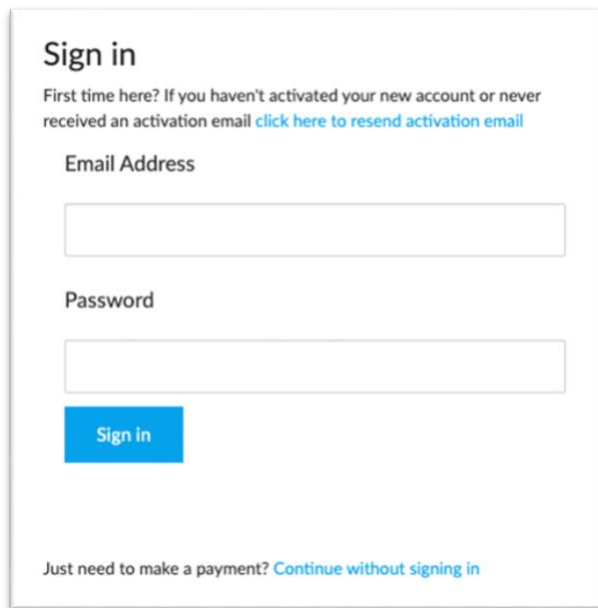
Thank you for your payment. A confirmation message has been sent to the account owner and any linked users who have elected to receive payment notifications.

Account:	0000089740
Amount:	\$49.16
Payment Date:	5/3/21
Confirmation Number:	6CZ227

[Dismiss](#)

Logging In

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



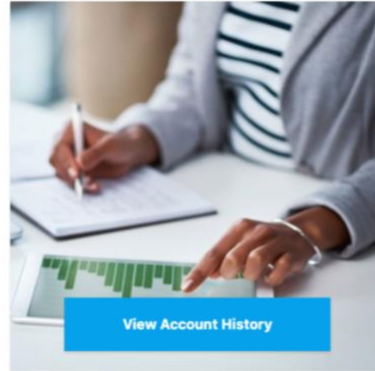
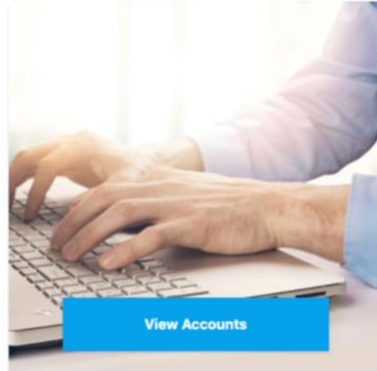
The image shows a sign-in form with the following elements:

- Sign in** (Section Header)
- Text: "First time here? If you haven't activated your new account or never received an activation email [click here to resend activation email](#)"
- Email Address** (Label)
-
- Password** (Label)
-
- Sign in** (Button)
- Text: "Just need to make a payment? [Continue without signing in](#)"

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

Welcome Partner

ENGIE Customer Portal is a place where everything related to your accounts is located. You can update your [profile & preferences](#), download reports, and [view all your accounts](#) all from right here.



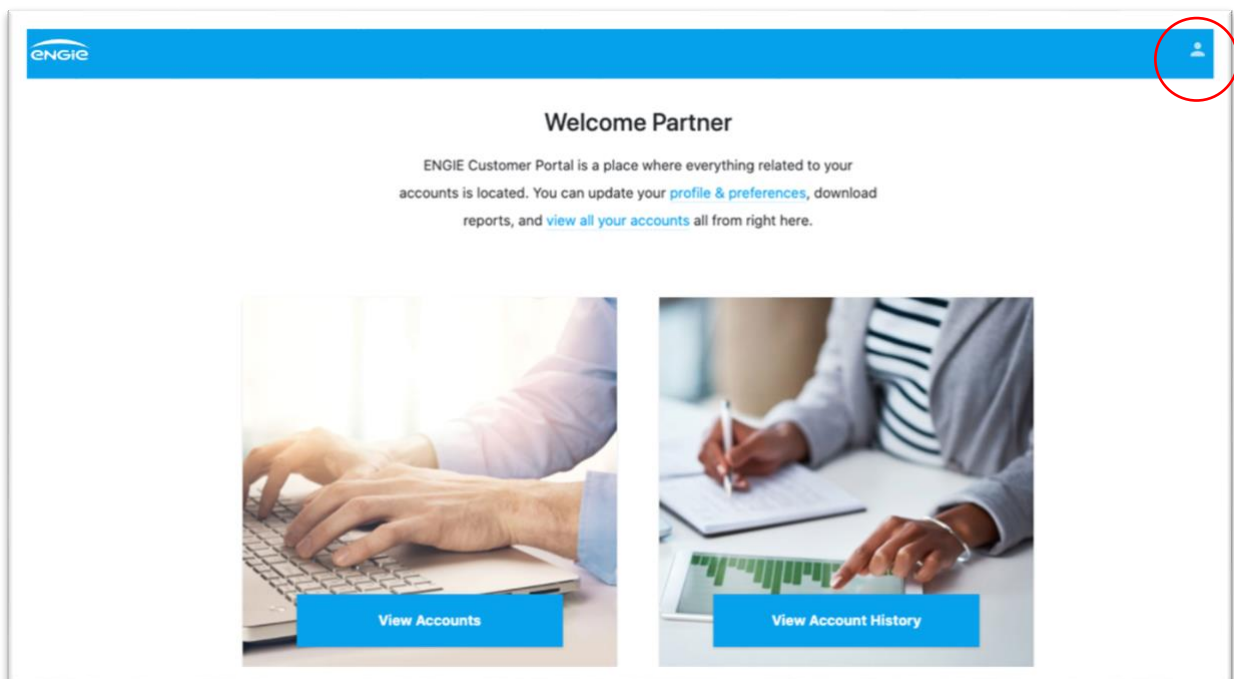
Profile & Preferences

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

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

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

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





My Profile & Preferences



Contact Info

Name

First Name

Partner

Last Name

Test



Preferred Name (Nickname)

Company Name

ENGIE



Billing Address

Address

Address Line 2 (Optional)

City

State

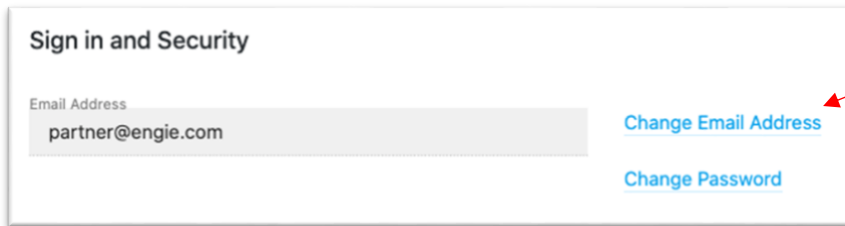
Zip Code

Phone

Primary

Changing Email Address

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



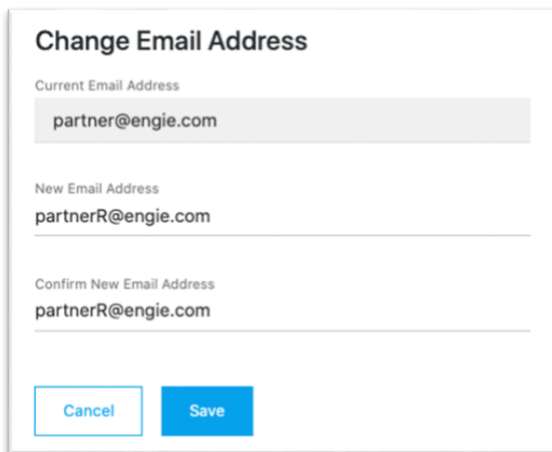
Sign in and Security

Email Address
partner@engie.com

[Change Email Address](#)

[Change Password](#)

A red arrow points to the 'Change Email Address' link.



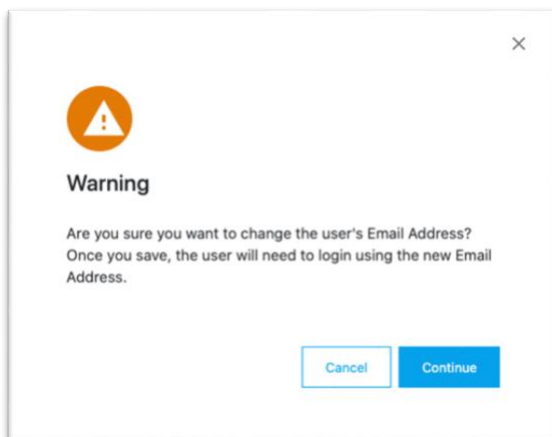
Change Email Address

Current Email Address
partner@engie.com

New Email Address
partnerR@engie.com

Confirm New Email Address
partnerR@engie.com

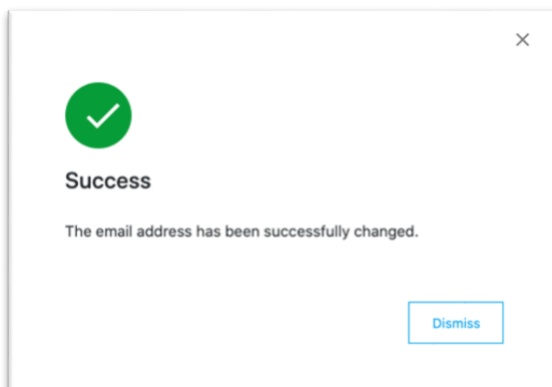
The current email address is shown and disabled. Enter and confirm the new email address you would like to change your online portal login to and click **save**.



Warning

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

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



Success

The email address has been successfully changed.

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

Changing Password

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



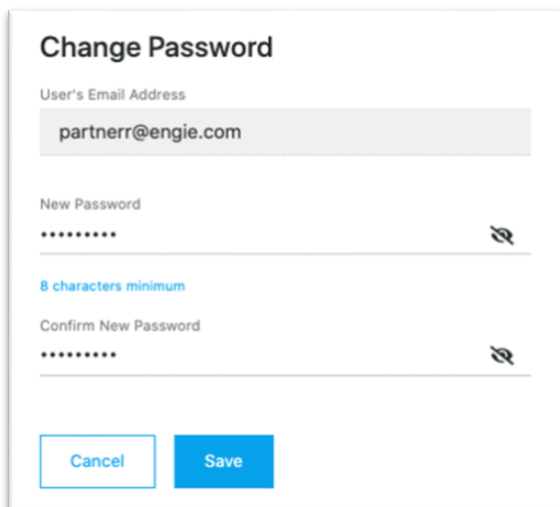
Sign in and Security

Email Address
partner@engie.com

[Change Email Address](#)

[Change Password](#) ←

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



Change Password

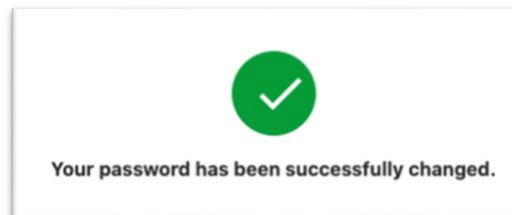
User's Email Address
partnerr@engie.com

New Password
.....

8 characters minimum

Confirm New Password
.....

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



Set up Communication Preferences/Email Notifications

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

Communication Preferences

Email Address
partner@engie.com

Email Notifications

Receive an email notification when:


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

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

E-bill statement is ready

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

[Back to Dashboard](#)

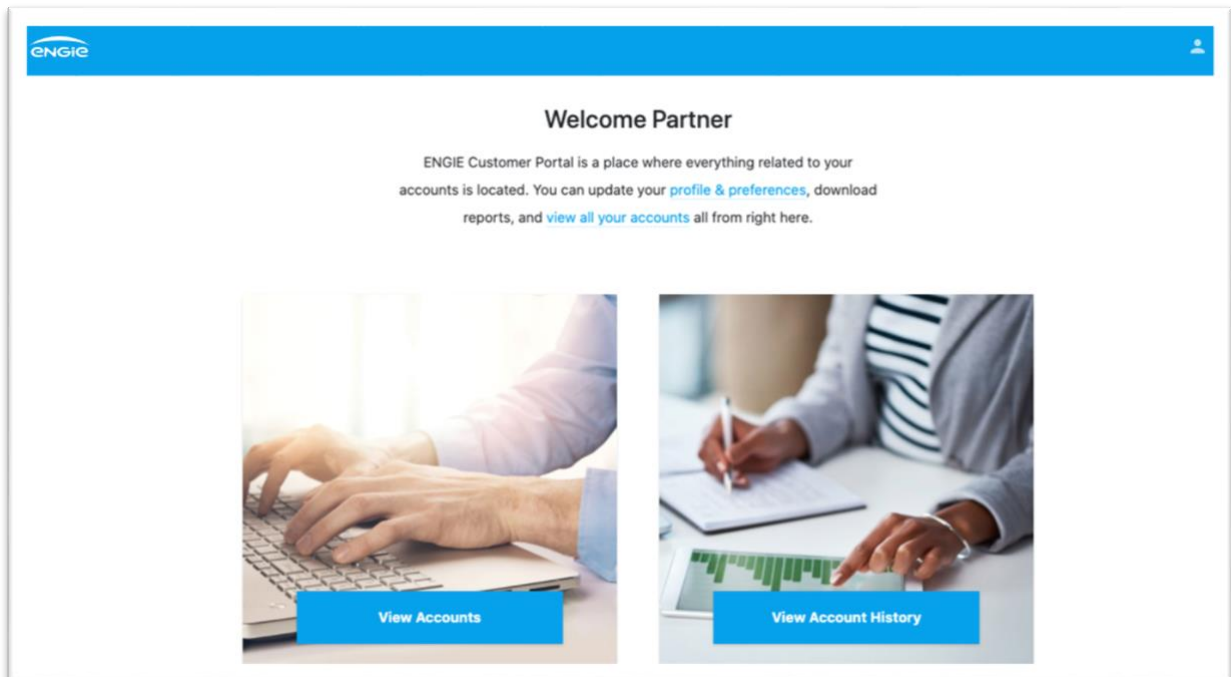


The user profile has been successfully updated.

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

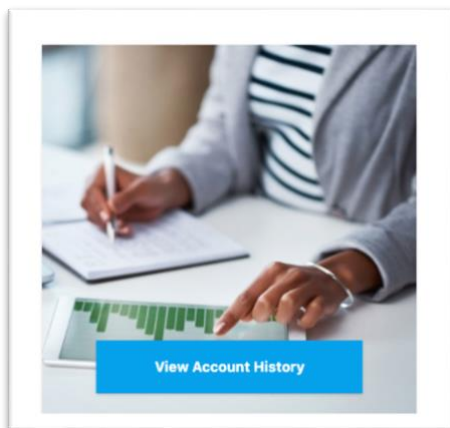
Dashboard Landing Page

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



View Account History

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



Account History

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

00000
00000
00000.....

BILLING ACCOUNT	TYPE	STATUS	PAYMENT AMOUNT	TRANSACTION DATE	STATEMENT PERIOD	USAGE	CURRENT CHARGES	STATEMENT BALANCE
000000	eCheck	Pending	(\$3,195.41)	09/04/2020				
000000	eCheck	Pending	(\$3,400.23)	09/03/2020				
000000	eCheck	Pending	(\$3,195.41)	09/03/2020				
000000	eCheck	Pending	(\$3,195.41)	09/02/2020				
000000	eCheck	Cancelled	(\$2,210.57)	07/15/2020				
000000	eCheck	Cancelled	(\$2,210.57)	07/13/2020				
000000	eCheck	Cancelled	(\$2,210.57)	07/13/2020				
000000	eCheck	Cancelled	(\$2,210.57)	07/10/2020				
000000	eCheck	Cancelled	(\$2,210.57)	07/10/2020				
000000	eCheck	Cancelled	(\$2,210.57)	07/10/2020				

0 to 0 of 0 Page 0 of 0

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

Account: 0000 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
000000	eCheck	Pending	(\$3,195.41)	09/04/2020				
000000	eCheck	Pending	(\$3,400.23)	09/03/2020				
000000	eCheck	Pending	(\$3,195.41)	09/03/2020				
000000	eCheck	Pending	(\$3,195.41)	09/02/2020				
000000	eCheck	Cancelled	(\$2,210.57)	07/15/2020				
000000	eCheck	Cancelled	(\$2,210.57)	07/13/2020				
000000	eCheck	Cancelled	(\$2,210.57)	07/13/2020				
000000	eCheck	Cancelled	(\$2,210.57)	07/10/2020				
000000	eCheck	Cancelled	(\$2,210.57)	07/10/2020				
000000	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.

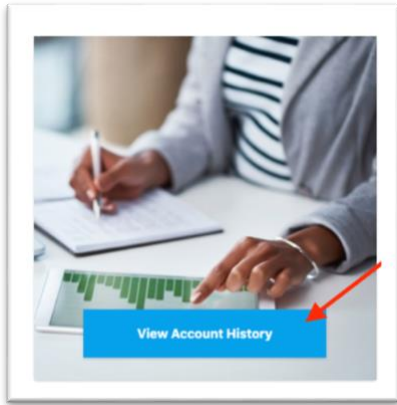
From Date: 6/20/2020 To Date: 9/18/2020 Search

can


Cancel a Pending Payment

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

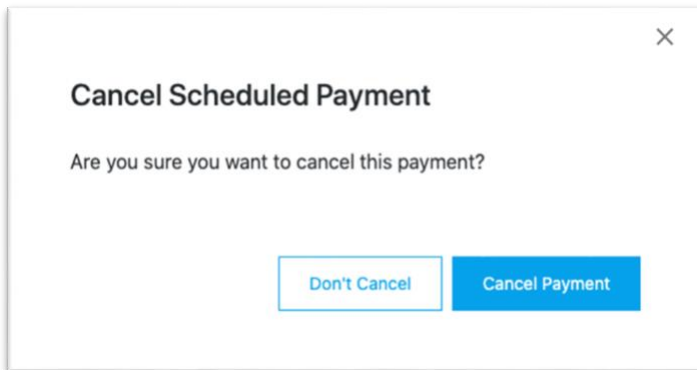
Click on the **View Account History** tile from the **Dashboard** page



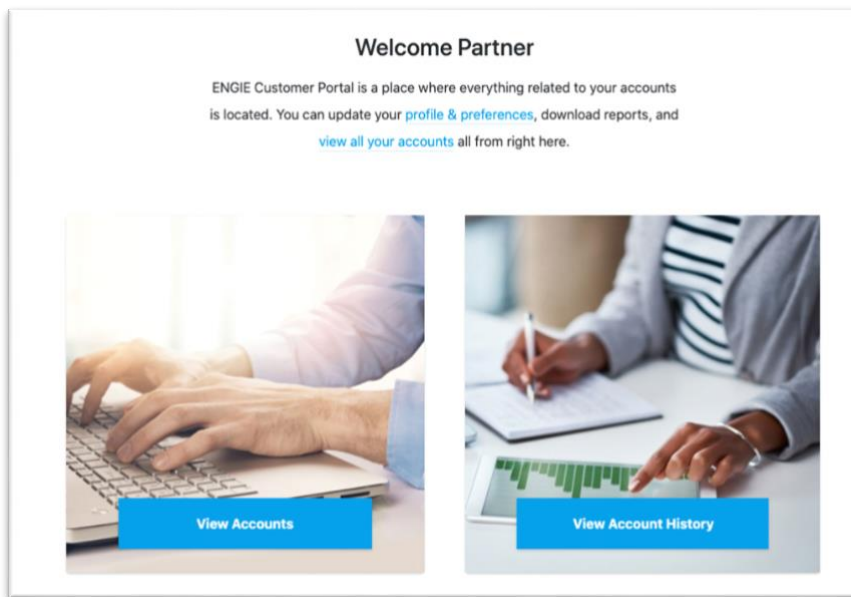
Locate the payment in the table. Click on the **blue 'x' icon** next to the **scheduled** payment

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

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.

User Profile

>

⚡ ENGIE - 3 Account(s)

🔍Save column preferences

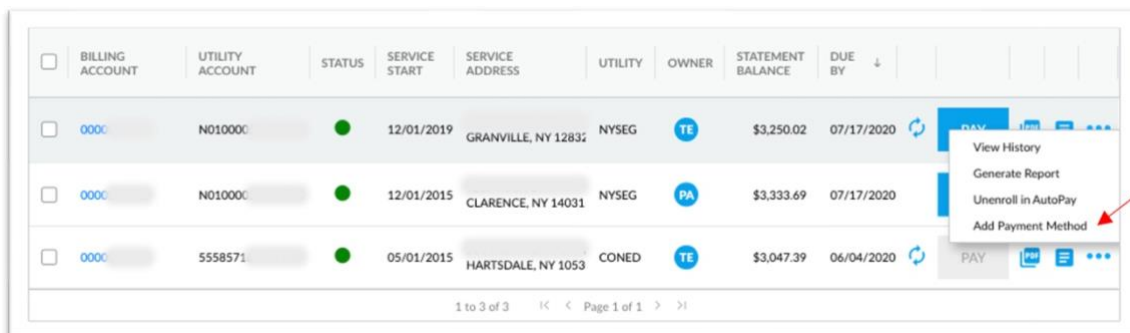
<input type="checkbox"/>	BILLING ACCOUNT	UTILITY ACCOUNT	STATUS	SERVICE START	SERVICE ADDRESS	UTILITY	OWNER	STATEMENT BALANCE	DUE BY					
<input type="checkbox"/>	00000	N01000	●	12/01/2019	GRANVILLE, NY 12832	NYSEG	TE	\$3,250.02	07/17/2020	🔄	PAY	📄	☰	⋮
<input type="checkbox"/>	00000	N01000	●	12/01/2015	CLARENCE, NY 14031	NYSEG	PA	\$3,333.69	07/17/2020		PAY	📄	☰	⋮
<input type="checkbox"/>	00000	555857	●	05/01/2015	HARTSDALE, NY 1053	CONED	TE	\$3,047.39	06/04/2020	🔄	PAY	📄	☰	⋮

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

Rows per page: 10 | [Export to Excel](#)

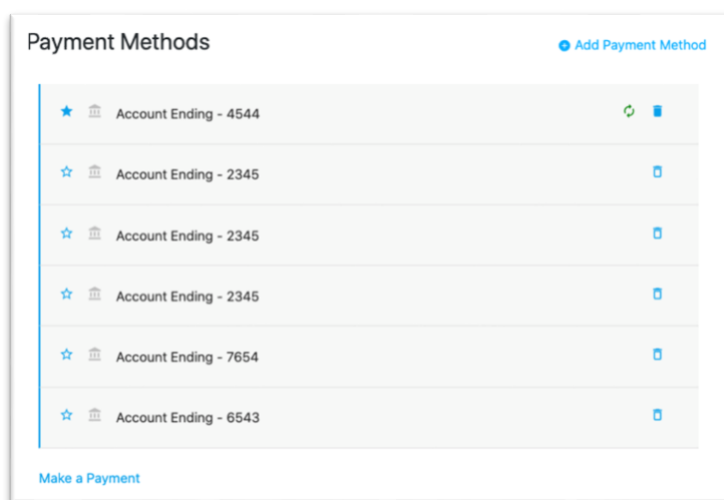
Add/Delete a Payment Method

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



<input type="checkbox"/>	BILLING ACCOUNT	UTILITY ACCOUNT	STATUS	SERVICE START	SERVICE ADDRESS	UTILITY	OWNER	STATEMENT BALANCE	DUE BY				
<input type="checkbox"/>	0000	N010000	●	12/01/2019	GRANVILLE, NY 12832	NYSEG	TE	\$3,250.02	07/17/2020	🔄	📄	📄	⋮
<input type="checkbox"/>	0000	N010000	●	12/01/2015	CLARENCE, NY 14031	NYSEG	PA	\$3,333.69	07/17/2020				⋮
<input type="checkbox"/>	0000	5558571	●	05/01/2015	HARTSDALE, NY 1053	CONED	TE	\$3,047.39	06/04/2020	🔄	PAY	📄	⋮

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



Payment Methods

[Add Payment Method](#)

- ★ 🏠 Account Ending - 4544 🔄 📄
- ★ 🏠 Account Ending - 2345 📄
- ★ 🏠 Account Ending - 2345 📄
- ★ 🏠 Account Ending - 2345 📄
- ★ 🏠 Account Ending - 7654 📄
- ★ 🏠 Account Ending - 6543 📄

[Make a Payment](#)

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

Add Payment Method (ACH)

Methods [Add Payment Method](#)

ENGIE Resources LLC
Payment Method eCheck

9-digit Routing # Checking

Account number Re-enter account numt

Billing Information United States of America

Company name

First and last name

Address Line 1

Address Line 2

City --State--

Postal code * Phone number

Email address

* required

Save

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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.

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.

Add Payment Method (Credit Card – Texas Customers Only)

Payment Methods

[Add Payment Method](#)

☆ Account Ending - 2322

☆ Account Ending - 6785

If you have an ACH debit block feature on your business checking account, please instruct your bank or financial institution to authorize ACH Company ID 5330903620 to draft your checking account. This Company ID must be authorized by your financial institution or your payment may fail or be returned

Make a Payment

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.

ENGIE Resources LLC
Payment Method

Card eCheck

XXXX XXXX XXXX XXXX MM YYYY

Billing Information United States of America

Company name *
First and last name *
Postal code *

* required (only one name field is required)

Save

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ISO-NE

Click the tab **Card**.

Please Note: There is a service fee of 4% for credit cards. We support Mastercard, American Express, and Discover Card.

Fill in the Credit Card Number, Expiration Date (2 digits for the month and 4 digits for the year), and Billing Information. Once all the fields are filled in properly, the save button will enable and turn green. Click **Save**.

ENGIE Resources LLC
Payment Method

Card eCheck

*****0005 02 2025

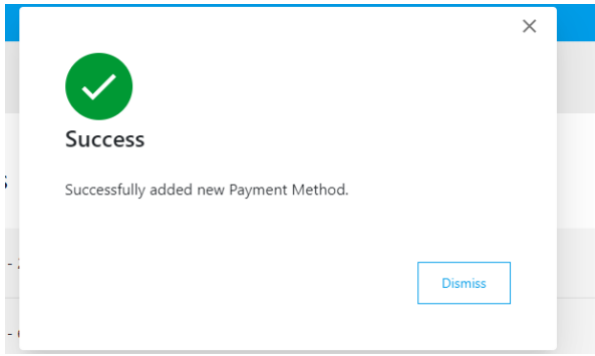
Billing Information United States of America

Cupcakes R Us
Betty Crocker
77059

Save

© 2021 CSG Forre Payments, Inc. Security Privacy TOS
ISO-NE

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

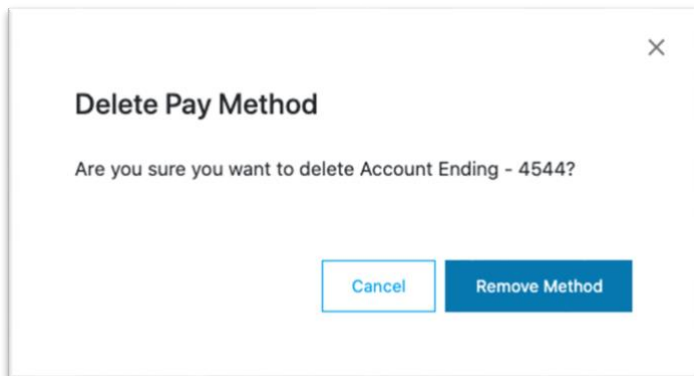
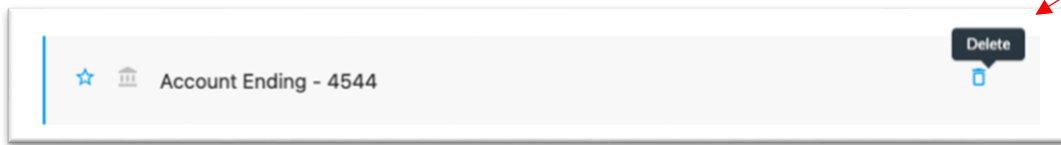


Success

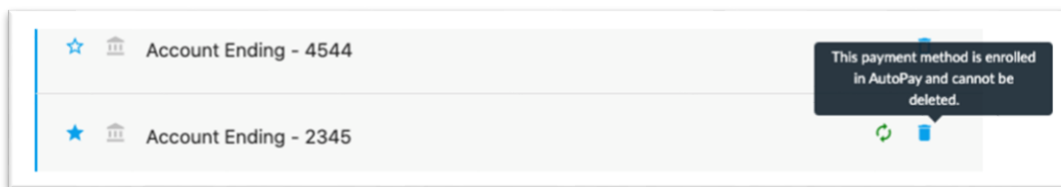
Successfully added new Payment Method.

Dismiss

Delete Payment Method



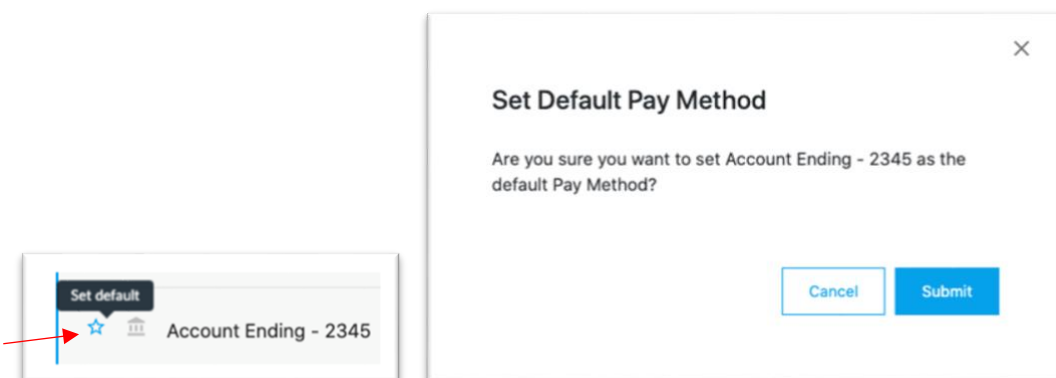
If you no longer need a payment method, you can remove it from the list. Click on the trash can icon to the right of the payment method to delete it. A pop up will appear asking you to confirm you want to delete the payment method. Click **Remove Method** to continue. The payment method will then be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



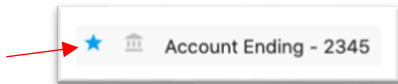
Please note that a payment **cannot** be deleted if it is the payment method that is enrolled in AutoPay. AutoPay is always tied to the default payment method. If you do want to delete a payment method that is associated with AutoPay, change the default payment method and it will tie AutoPay with that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

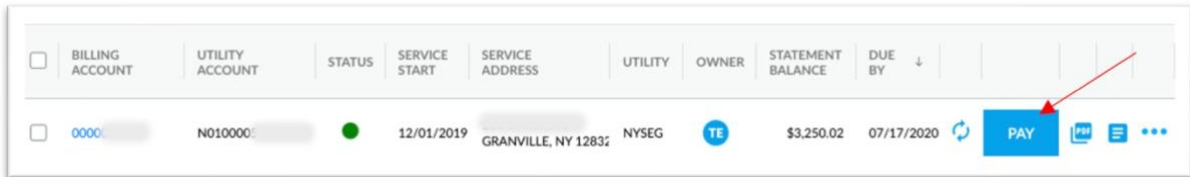


A pop up will appear, asking you to confirm you want to set it as the default pay method. Select **Submit** to continue. A blue star icon will now appear next to the new default pay method.



Make a Payment (ACH and Credit Cards)

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.

Total Amount Due

\$3,195.41

AutoPay applied for Jul 17

[View Bill](#)

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

Payment Amount

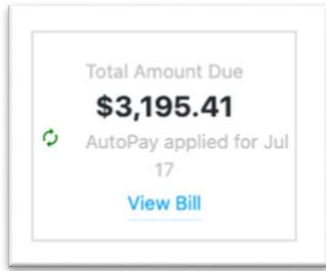
Payment Date

9/18/2020

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

Payment Method

[Submit Payment](#)

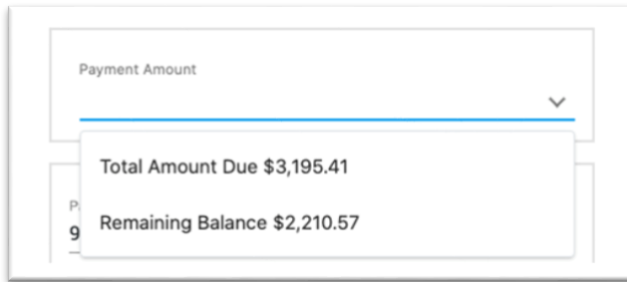


The top section will show your total amount due and if it is enrolled in AutoPay, a message will appear here to indicate that. You can still proceed even though you are enrolled in AutoPay if you want to make a one-time payment.

[View Bill](#)

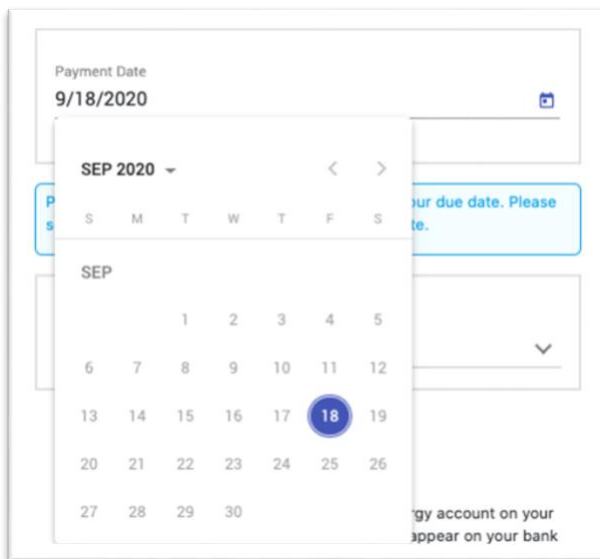
You can also view your bill you are paying on here. This will open up a PDF of the statement.

Payment Amount



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

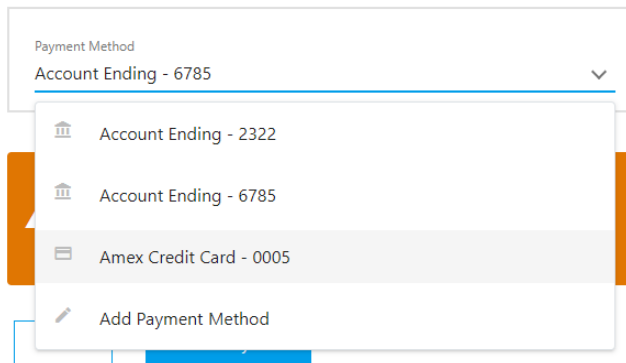
Payment Date



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

Payment Method

When clicking on the caret (down arrow), you will see



all of your payment methods that have been added.

Please note: credit card payments are only for Texas customers at this time.

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.

When selecting a credit card payment method, please note there is a **credit card service amount** that will automatically calculate and populate.

Payment Method
Amex Credit Card - 0005

Credit Card Service Fee ⓘ
\$15.49

Total Amount
\$402.80

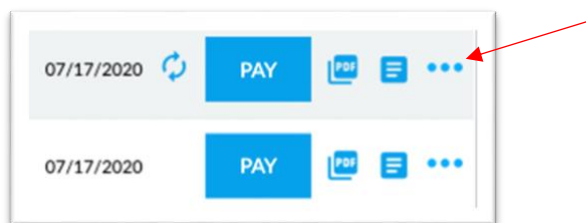
⚠ A service fee of 4% will be charged on all credit card payments. (\$2.00 minimum).

Cancel Submit Payment

Click **Submit Payment**. A confirmation will pop up with an authorization number.

Update Billing Address

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



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

<input type="checkbox"/>	BILLING ACCOUNT	UTILITY ACCOUNT	STATUS	SERVICE START	SERVICE ADDRESS	UTILITY	OWNER	STATEMENT BALANCE	DUE BY			
<input type="checkbox"/>	0000	N0100005	●	12/01/2019	GRANVILLE, NY 12832	NYSEG	TE	\$3,250.02	07/17/2020	🔄	PAY	PDF ⓘ ⋮
<input type="checkbox"/>	0000	N0100005	●	12/01/2015	BUFFALO, NY 14221	NYSEG	TE	\$3,029.15	07/17/2020	🔄		Add Payment Method Update Billing Address Unenroll in AutoPay
<input type="checkbox"/>	0000	55585716	●	05/01/2015	HARTSDALE, NY 10531	CONED	TE	\$3,047.39	06/04/2020	🔄		View History Generate Report
<input type="checkbox"/>	0000	47233900	●	09/01/2012	FAIRMOUNT, IL 61841	AMEREN I		\$18,823.12	05/26/2020			Share Account Transfer Account Release Account

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

Update Billing Address

Apply a single billing address to multiple accounts

Address Line 1

Address Line 2

City State

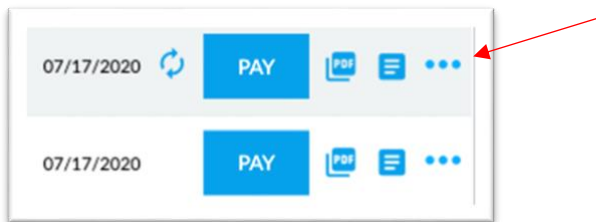
Postal Code

Billing Email Address

Cancel
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.

<input type="checkbox"/>	BILLING ACCOUNT	UTILITY ACCOUNT	STATUS	SERVICE START	SERVICE ADDRESS	UTILITY	OWNER	STATEMENT BALANCE	DUE BY					
<input type="checkbox"/>	0000	N0100005	●	12/01/2019	GRANVILLE, NY 12832	NYSEG	TE	\$3,250.02	07/17/2020					
<input type="checkbox"/>	0000	N0100005	●	12/01/2015	CLARENCE, NY 14031	NYSEG	PA	\$3,333.69	07/17/2020					
<input type="checkbox"/>	0000	55585716	●	05/01/2015	HARTSDALE, NY 1053	CONED	TE	\$3,047.39	06/04/2020					

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

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

Account: 00000 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
00000	eCheck	Pending	(\$3,195.41)	09/04/2020				
00000	eCheck	Pending	(\$3,400.23)	09/03/2020				
00000	eCheck	Pending	(\$3,195.41)	09/03/2020				
00000	eCheck	Pending	(\$3,195.41)	09/02/2020				
00000	eCheck	Cancelled	(\$2,210.57)	07/15/2020				
00000	eCheck	Cancelled	(\$2,210.57)	07/13/2020				
00000	eCheck	Cancelled	(\$2,210.57)	07/13/2020				
00000	eCheck	Cancelled	(\$2,210.57)	07/10/2020				
00000	eCheck	Cancelled	(\$2,210.57)	07/10/2020				
00000	eCheck	Cancelled	(\$2,210.57)	07/10/2020				

1 to 10 of 12 Page 1 of 2

Rows per page: 10 Export to Excel

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

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

Account: 00000 From Date: 6/20/2020 To Date: 9/18/2020 Search can

BILLING ACCOUNT	TYPE	STATUS	PAYMENT AMOUNT	TRANSACTION DATE	STATEMENT PERIOD	USAGE	CURRENT CHARGES	STATEMENT BALANCE
00000	eCheck	Cancelled	(\$2,210.57)	07/15/2020				
00000	eCheck	Cancelled	(\$2,210.57)	07/13/2020				
00000	eCheck	Cancelled	(\$2,210.57)	07/13/2020				
00000	eCheck	Cancelled	(\$2,210.57)	07/10/2020				
00000	eCheck	Cancelled	(\$2,210.57)	07/10/2020				
00000	eCheck	Cancelled	(\$2,210.57)	07/10/2020				
00000	eCheck	Cancelled	(\$2,210.57)	07/10/2020				
00000	eCheck	Cancelled	(\$2,210.57)	07/10/2020				

1 to 8 of 8 Page 1 of 1

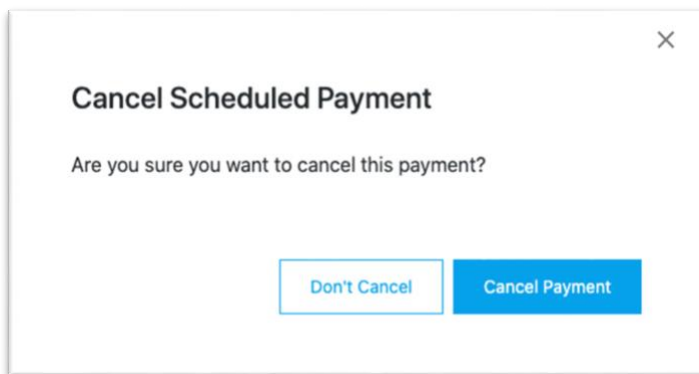
Cancel a Pending Payment

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

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

00000	eCheck	Scheduled 	05/27/2020				(\$3,047.39)	\$0.00
-------	--------	---	------------	--	--	--	--------------	--------

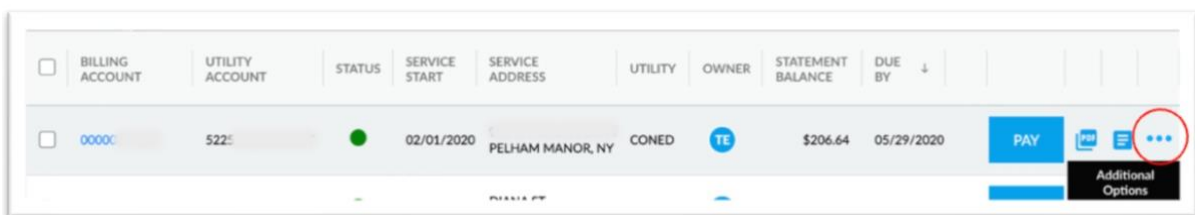
A confirmation modal appears. Click **Cancel Payment** to continue.



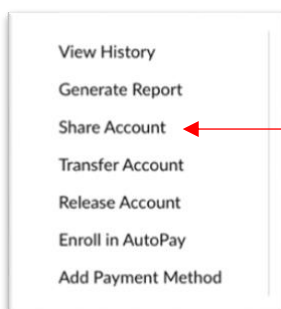
Share Account(s)

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.



Share Accounts

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

Accounts Selected
00000

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

Role

Access Type

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

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

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

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

Role
Customer

Customer
Partner

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

Role
Customer

Access Type
Sharee
Power Sharee
Read Only

- Sharee

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

- Power Sharee

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

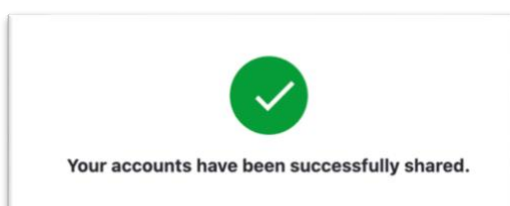
Role
Partner

Access Type
Sharee
Power Sharee
Read Only

- Read Only

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

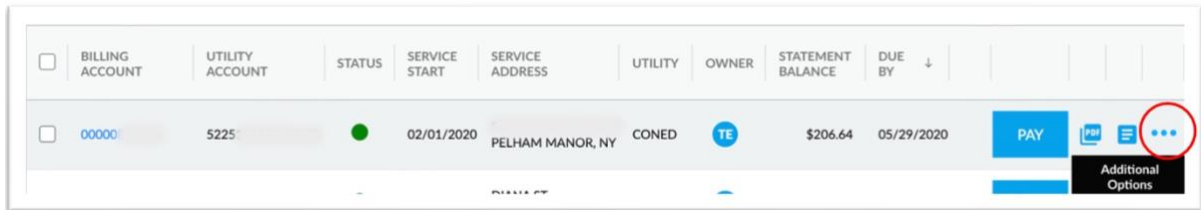
After selecting the Role and Access Type, Click **Share**. A message is displayed that the account(s) have been shared.



Transfer Account(s)

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

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



<input type="checkbox"/>	BILLING ACCOUNT	UTILITY ACCOUNT	STATUS	SERVICE START	SERVICE ADDRESS	UTILITY	OWNER	STATEMENT BALANCE	DUE BY			
<input type="checkbox"/>	00000	5225	●	02/01/2020	PELHAM MANOR, NY	CONED	TE	\$206.64	05/29/2020	PAY	PDF	⋮

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

Transfer Accounts

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

Accounts Selected
00000

Email
test@enge.com, test1@enge.com

Role
▼

Access Type
▼

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

Role
Customer ▼

Access Type
▼

- Owner
- Sharee
- Power Sharee
- Read Only

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

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

- Owner

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

- Sharee

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

- Power Sharee

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

- Read Only

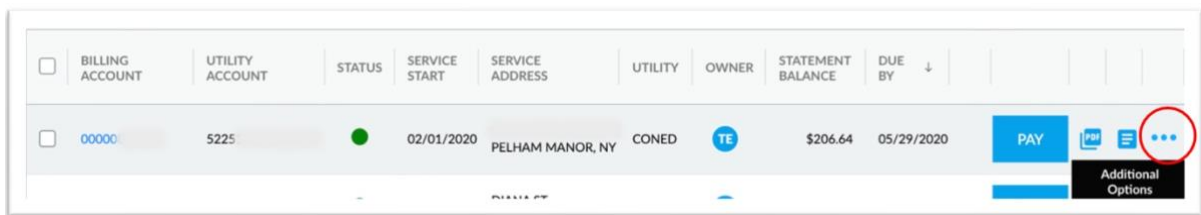
With Read Only access, a user can view all information pertinent to the account, however, they are only able to edit their user profile.

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

Release Account(s)

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

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



<input type="checkbox"/>	BILLING ACCOUNT	UTILITY ACCOUNT	STATUS	SERVICE START	SERVICE ADDRESS	UTILITY	OWNER	STATEMENT BALANCE	DUE BY			
<input type="checkbox"/>	00000	5225	●	02/01/2020	PELHAM MANOR, NY	CONED	TE	\$206.64	05/29/2020	PAY	PDF	⋮

Additional Options

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

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

Release Accounts

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

Accounts Selected

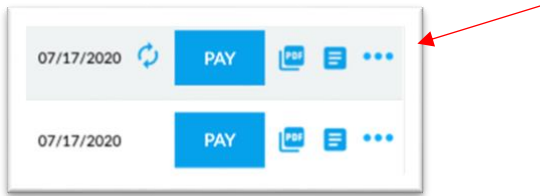
00000

[Cancel](#) [Release](#)

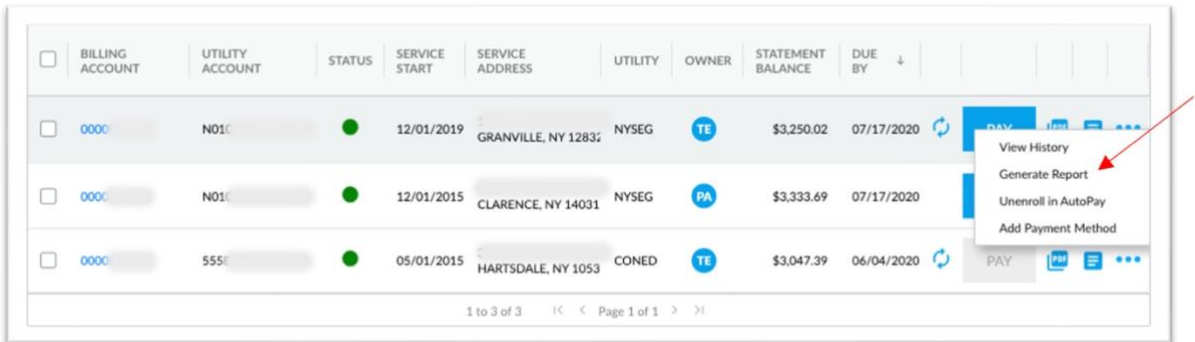
If you need additional assistance visit our [Help Center](#) for additional information on how to get in touch with us.

Generate Report

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



Click on the **Generate Report** option.



Generate Report

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

Select Billed Dates

Choose from date: 9/11/2020

Choose to date: 9/18/2020

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

Select Report Data Fields

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

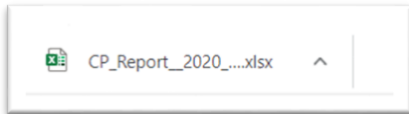
The page will display fields under two columns/sections: **Billing** and **Meter** information.

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



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.

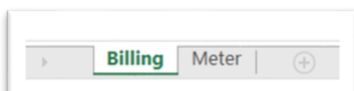


The excel file will have 2 tabs, one for **Billing Info** and one for **Meter Info**.

Billing Information

Customer Name	Supplier Account Number	Utility Account Number
CO.	18	NO:
CO.	18	NO:
CO.	18	NO:
CO.	18	NO:
CO.	18	NO:
CO.	18	NO:

Navigation: > **Billing** | Meter | +



Enroll in AutoPay

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



<input type="checkbox"/>	BILLING ACCOUNT	UTILITY ACCOUNT	STATUS	SERVICE START	SERVICE ADDRESS	UTILITY	OWNER	STATEMENT BALANCE	DUE BY			
<input type="checkbox"/>	00000	N01C	●	12/01/2019	GRANVILLE, NY 12832	NYSEG	TE	\$3,250.02	07/17/2020			
<input type="checkbox"/>	00000	N01C	●	12/01/2015	CLARENCE, NY 14031	NYSEG	PA	\$3,333.69	07/17/2020			
<input type="checkbox"/>	00000	555E	●	05/01/2015	HARTSDALE, NY 1053	CONED	TE	\$3,047.39	06/04/2020	🔄		

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

AutoPay & Paperless Billing

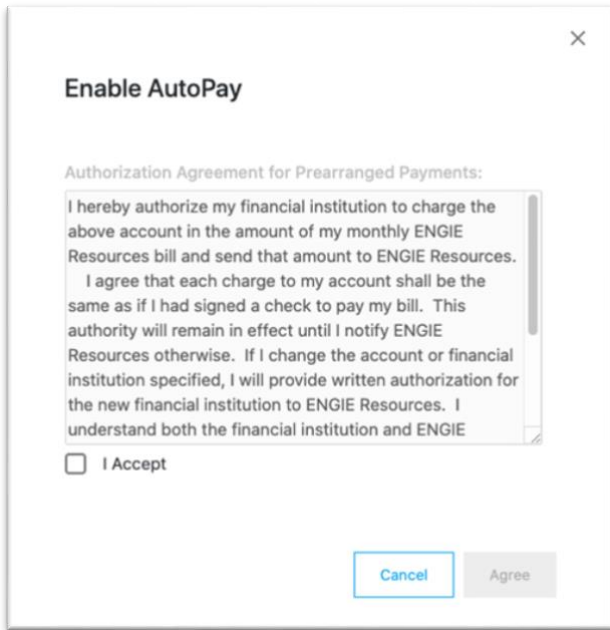
Account number: 00000

AutoPay

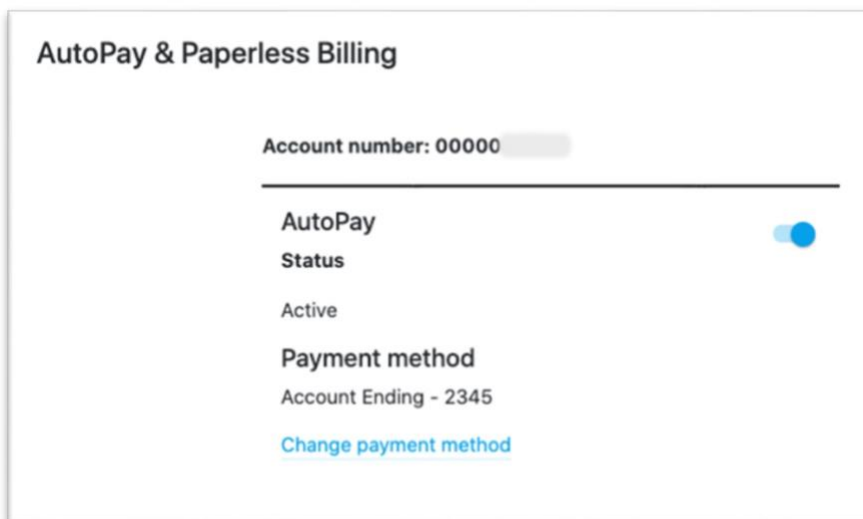
Status

Inactive

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



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



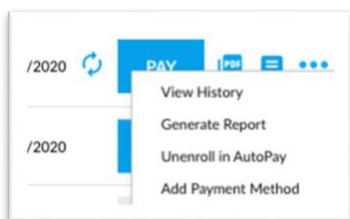
Un-Enroll in AutoPay

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

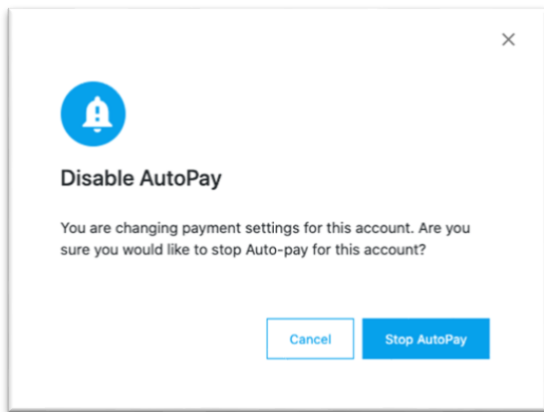


account. If an account is enrolled in AutoPay, there will be a blue icon stating it is enrolled.

Click Un-Enroll in AutoPay.



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

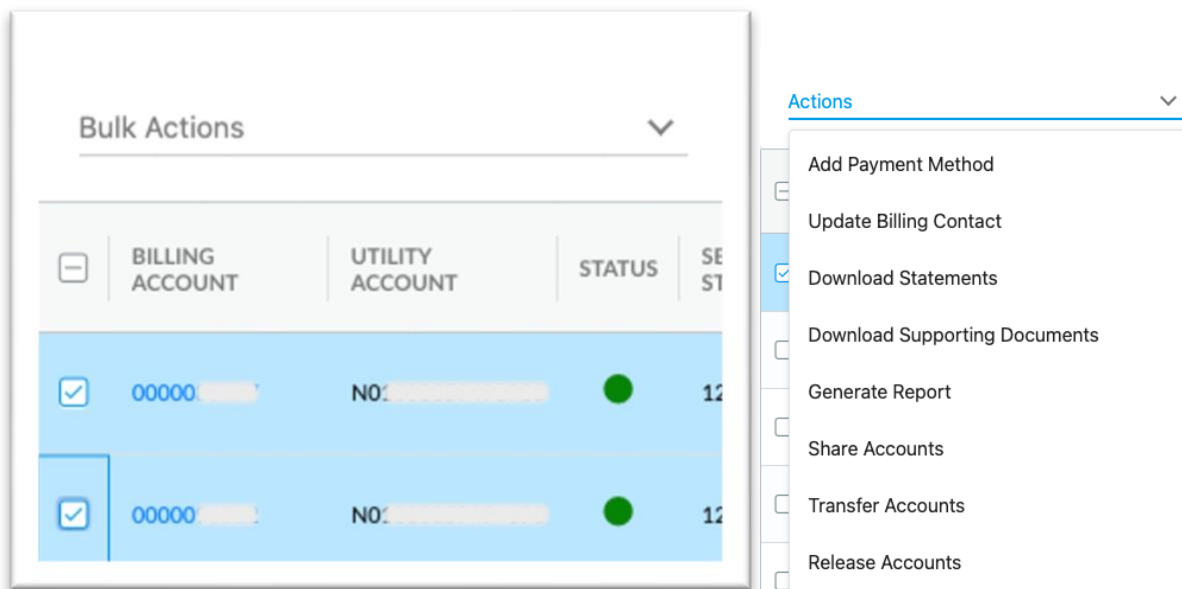


The toggle is now off and the AutoPay is off.



Bulk Actions

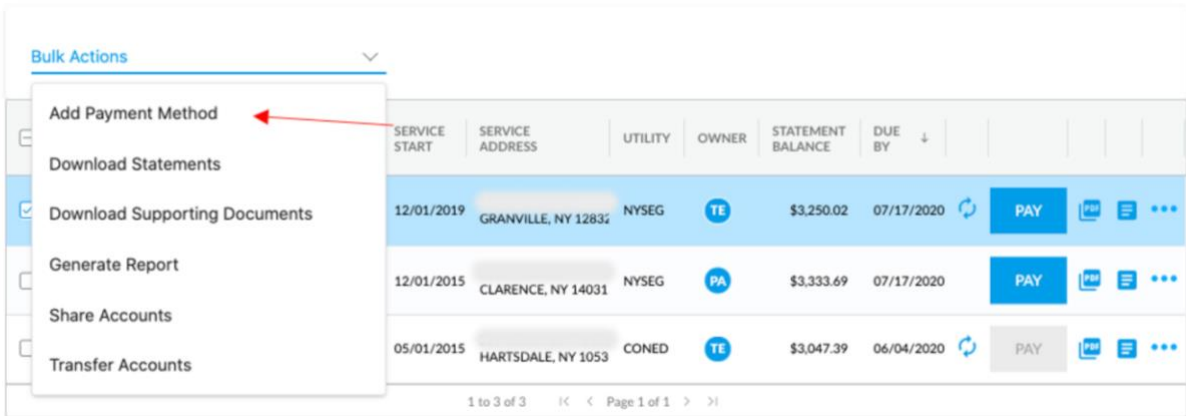
On the account list view, to the left of your accounts you will see a checkbox. Click on one or more checkboxes and a dropdown named **Actions** will appear.



You can select from multiple options:

Add a Payment Method for Multiple Accounts (ACH)

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 **Add 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, select **Checking or Savings Account** and 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**. Select **Save** to make changes and a success message will appear.

Add Payment Method

Apply a single payment method to multiple accounts

2 Selected Accounts

00000

00000

Select Payment Method

Checking or Savings Account

Credit Card (only eligible for Texas customers)

⚠️ If you have an ACH debit block feature on your business checking account, please instruct your bank or financial institution to authorize ACH Company ID 5330903620 to draft your checking account. This Company ID must be authorized by your financial institution or your payment may fail or be returned.

Routing Number

Confirm Routing Number

Account Number

Confirm Account Number

Account Type

Name (First and Last or Company Name)

Set as default payment method

Turn on AutoPay for all accounts

Cancel

Save

Add a Payment Method for Multiple Accounts (Credit Cards – Texas Customers Only)

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**.

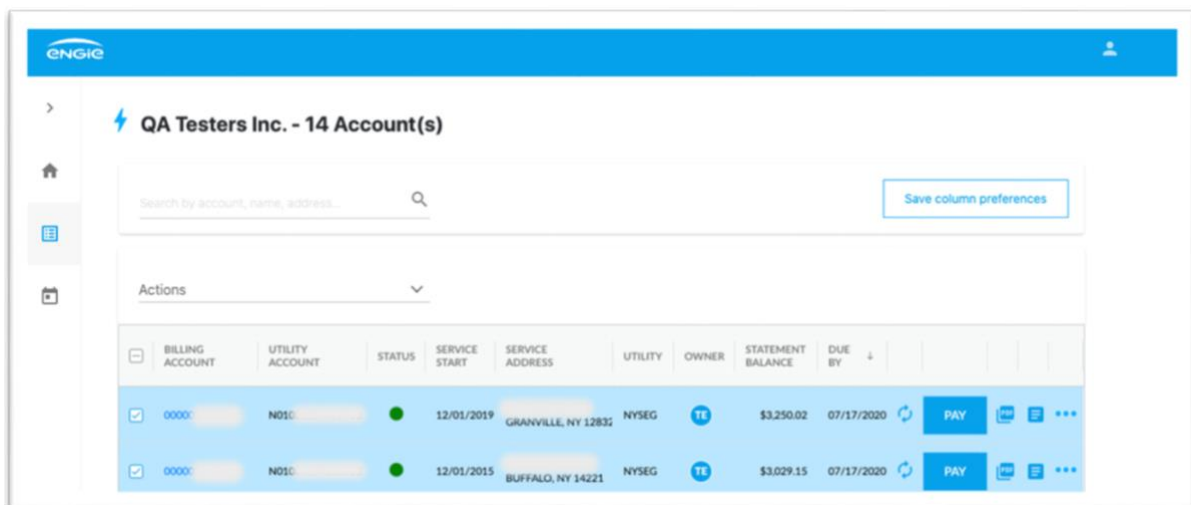
This will take you to the **Add Payment Method** screen. On the left you will see the selected accounts you will be applying the change to. *Please note that if you do not have permissions to apply payment methods to certain accounts, it will not display on the left. There will be a service fee of 4% when paying by credit card. We support Mastercard, American Express, and Discover Card.*

Next, select **Credit Card** and 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.

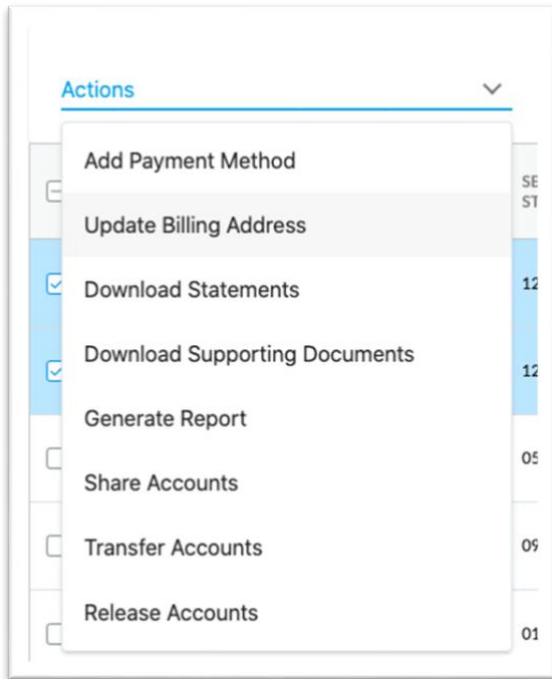
Also, if you would like to turn on AutoPay for those selected accounts, select the second box **Turn on AutoPay for all accounts**. Select **Save** to make changes and a success message will appear.

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.



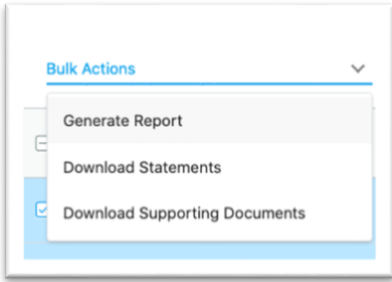
A dropdown named **Actions** will appear. Click **Update Billing Address**.



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**.



Generate Report

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

Select Billed Dates

Choose from date Choose to date

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

Select Report Data Fields

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

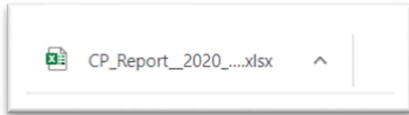
The page will display fields under two columns/sections: **Billing** and **Meter** information.

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

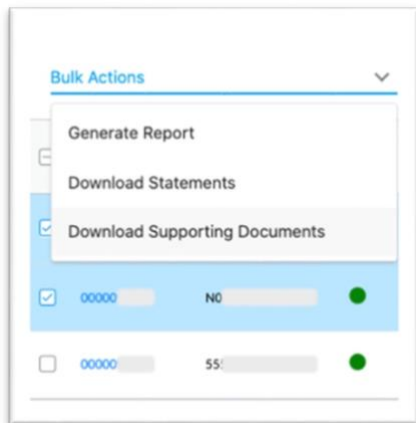
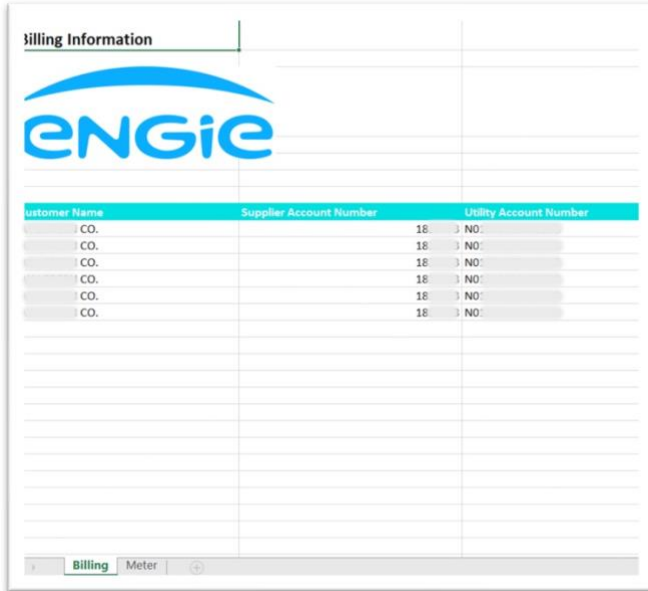
Save Preferences

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

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



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



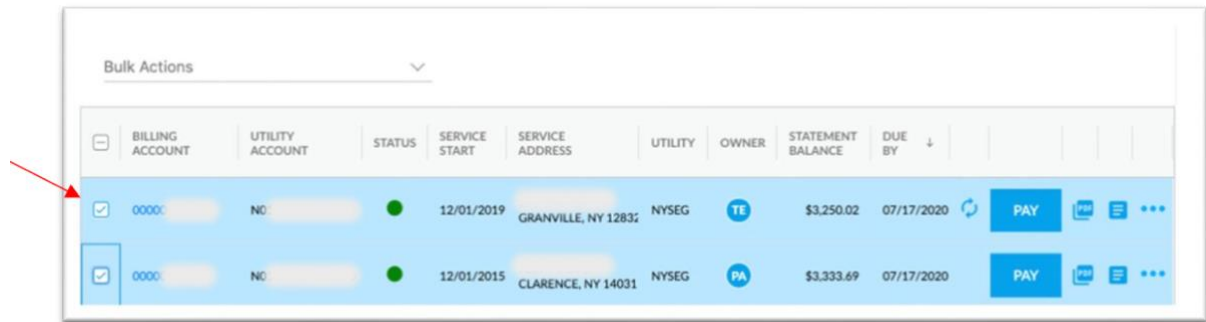
Bulk Download Statements – Download Statements (bills) for Multiple Accounts

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.

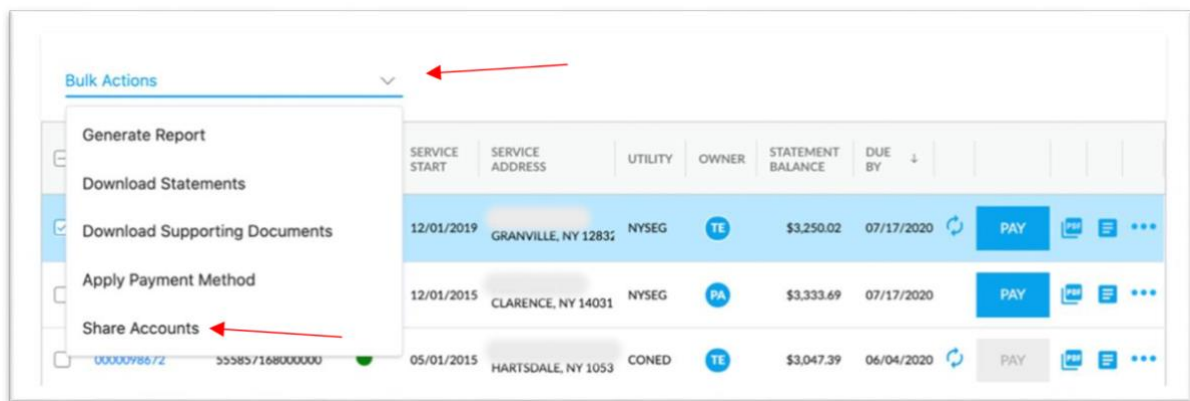
Bulk Download Supporting Documents – Download Supporting Documents for Multiple Accounts

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 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**.



Share Accounts

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

Selected Accounts: 00000

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

Role:

Access Type:

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

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

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

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

Role
Customer

Access Type

- Sharee
- Power Sharee
- Read Only

Select the access type you want them to receive.

- Sharee

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

Role
Partner

Access Type

- Sharee
- Power Sharee
- Read Only

- Power Sharee

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

- Read Only

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

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

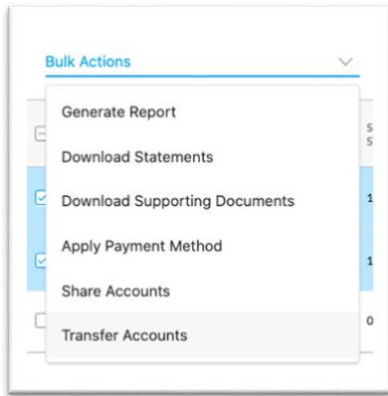
Bulk Transfer Accounts – Transfer Multiple Accounts at Once

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

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

Bulk Actions

	BILLING ACCOUNT	UTILITY ACCOUNT	STATUS	SERVICE START	SERVICE ADDRESS	UTILITY	OWNER	STATEMENT BALANCE	DUE BY			
<input checked="" type="checkbox"/>	0000: [REDACTED]	NO: [REDACTED]	●	12/01/2019	GRANVILLE, NY 12833	NYSEG	TE	\$3,250.02	07/17/2020	🔄	PAY	PDF ☰ ⋮
<input checked="" type="checkbox"/>	0000: [REDACTED]	NO: [REDACTED]	●	12/01/2015	CLARENCE, NY 14031	NYSEG	PA	\$3,333.69	07/17/2020		PAY	PDF ☰ ⋮



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

Transfer Accounts

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

<p>Selected Accounts</p> <p>00000</p>	<p>Email Addresses (separated by comma)</p> <p>test@engie.com, test1@engie.com</p> <hr/> <p>Role</p> <p style="text-align: right;">▼</p> <hr/> <p>Access Type</p> <p style="text-align: right;">▼</p>
---------------------------------------	---

Cancel
Transfer

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

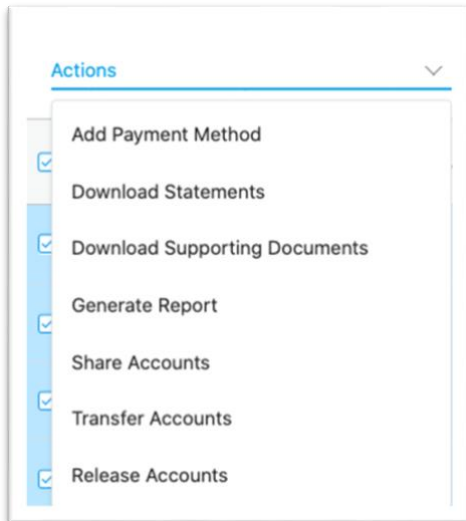
Fill out the email addresses in which you would like to transfer the selected accounts to. Make sure you separate the email addresses with a comma.

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

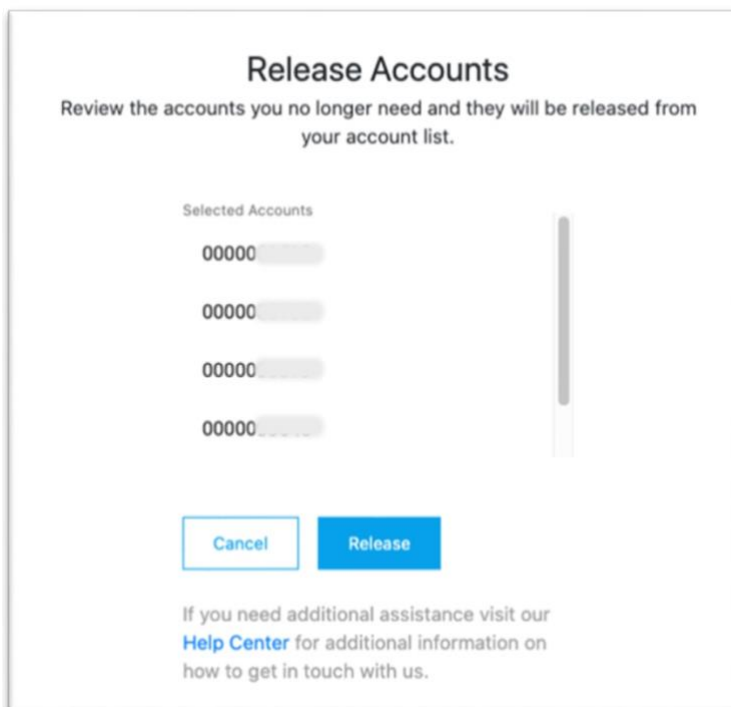
Bulk Release Accounts – Remove Multiple Accounts at Once

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

Bulk Actions										
<input type="checkbox"/>	BILLING ACCOUNT	UTILITY ACCOUNT	STATUS	SERVICE START	SERVICE ADDRESS	UTILITY	OWNER	STATEMENT BALANCE	DUE BY	
<input checked="" type="checkbox"/>	00000	NO	●	12/01/2019	GRANVILLE, NY 12832	NYSEG	TE	\$3,250.02	07/17/2020	PAY ☰
<input checked="" type="checkbox"/>	00000	NO	●	12/01/2015	CLARENCE, NY 14031	NYSEG	PA	\$3,333.69	07/17/2020	PAY ☰



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



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

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

ENGIE - 00000

Total Amount Due
 Your most recent payment of \$2,540.13 on September 3, 2020 is pending.
 Remaining Balance **\$2,540.13**
 Current Charges **\$793.56**
 Statement Balance **\$3,333.69**
 Total Amount Due **-\$15,863.69**

Account Info
 Billing Account 00000
 Utility Account N0100
 Utility NYSEG
 Account Owner(s)
 This account is receiving paper bills.

Contact
 Service Address CLARENCE, NY 14031
 Billing Address ENGIE
 SPOKANE, WA 99210
 Contact Type: Billing
 Billing Email Address

Account Settings
 Service Start Date Dec 1, 2015
 Account Status Account Accepted
 Billing Type Separate Bills
 Tax Status Tax Exempt

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

	BILL CYCLE	YEAR
> Retail Adder Charge	\$24.31	
> Energy Imbalance Charge	\$402.81	
Subtotal Supplier Charges	\$427.12	
> Unforced Capacity Charge	\$90.89	
> Ancillary Services Charge	\$211.70	

Billing Days **35**
 Average Daily Charges **\$22.67**

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

Inc. - 16 Account(s)

Search by account, name, address...

	BILLING ACCOUNT	UTILITY ACCOUNT	STATUS	SERVICE START
<input type="checkbox"/>	00000	597	●	01/01/2016

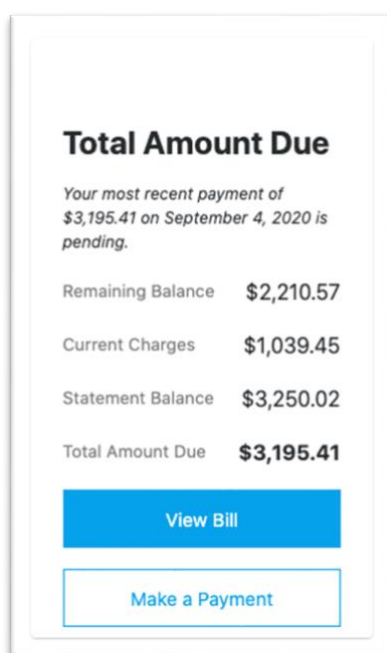
Account Information

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

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

Total Amount Due

Total Amount Due will have the following components:



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

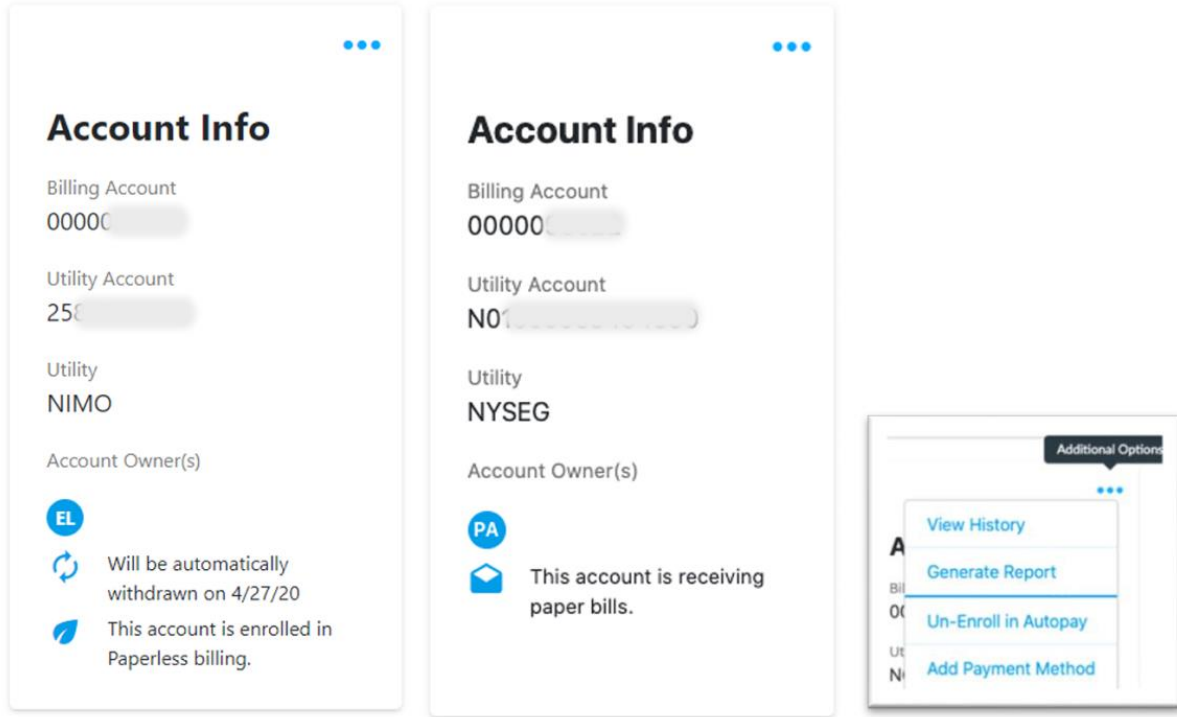
View Bill/Statement

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

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

Account Info Tile

Account Info tile will display the following information:



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

Contact Tile

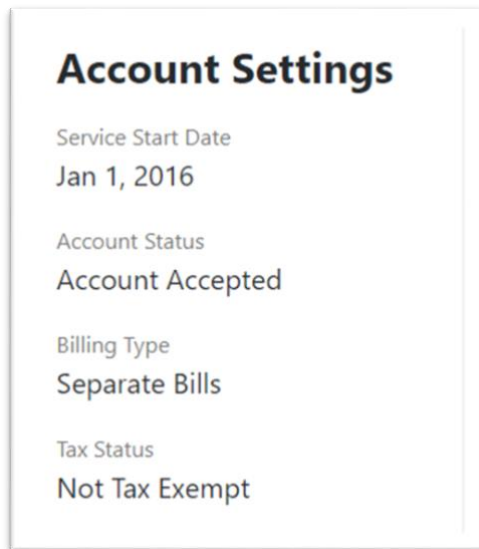
Contact tile has the following information:

- 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.

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

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

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

- Subtotal Taxes
- Remaining Balance
- Current Charges
- Statement Balance
- Total Amount Due

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

Bill Cycle Tab - Usage

Expand the carrot to view details of the line item charge

Costs & Usage

April 14, 2020 - May 12, 2020

▼ Retail Adder Charge	\$30.02
→ 30320 KWH @ 0.000990 / KWH for 29 days	\$30.02

Year Tab - Usage

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

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

Costs & Usage

March 12, 2020 - April 10, 2020

BILL CYCLE YEAR

[< Previous Year](#) **January 1, 2020 - December 31, 2020** [Next Year >](#)

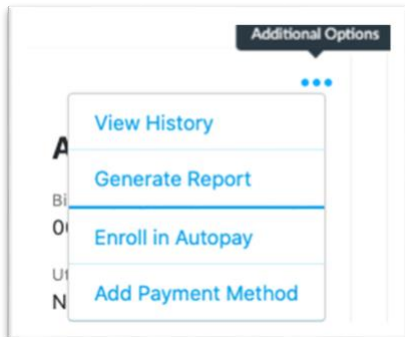
BILL PERIOD FROM	BILL PERIOD TO	METER NUMBER	TOTAL kWh	TOTAL kW
03/12/2020	04/10/2020		17360	0
02/11/2020	03/12/2020		20480	0

1 to 2 of 2 << < Page 1 of 1 > >>

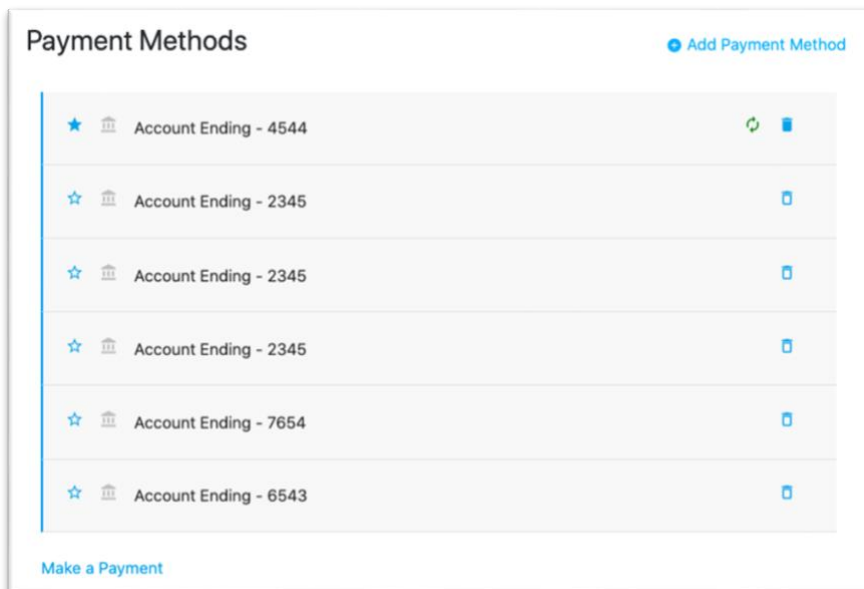
[Export to excel](#)

Add/Delete a Payment Method: Scenario 1

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



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



Add Payment Method (ACH)

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.

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.

Add Payment Method (Credit Card – Texas Customers Only)

Select this to be taken to a pop up that will have you enter in payment information.

Click the tab **Card**.

Please Note: There is a service fee of 4% for credit cards. We support Mastercard, American Express, and Discover Card.

Fill in the Credit Card Number, Expiration Date (*2 digits for the month and 4 digits for the year*), and Billing Information. Once all the fields are filled in properly, the save button will enable and turn green. Click **Save**.

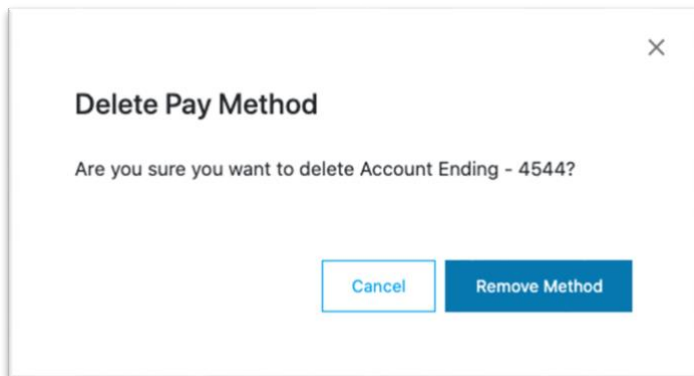
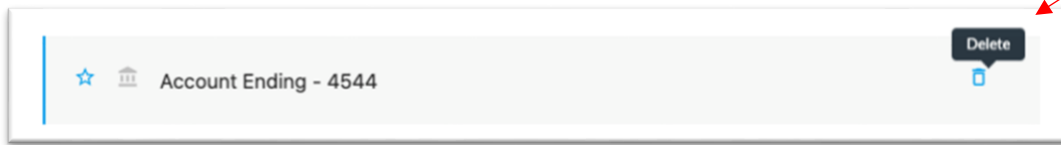
The screenshot shows a web form for adding a payment method. The form is titled "ENGIE Resources LLC Payment Method" and has two tabs: "Card" and "eCheck". The "Card" tab is selected. The form contains the following fields:

- Card Number: *****0005
- Expiration Date: 02 2025
- Billing Information: United States of America (dropdown menu)
- Cardholder Name: Cupcakes R Us
- Address: Betty Crocker
- Zip Code: 77059

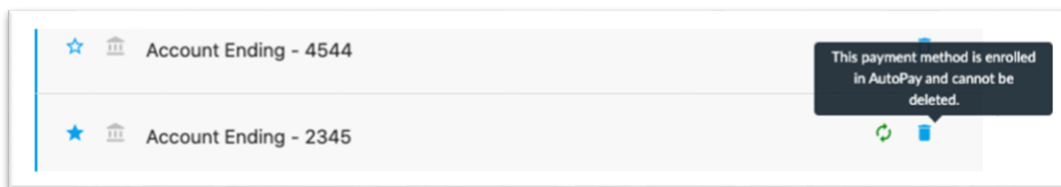
A green "Save" button is located at the bottom right of the form, highlighted with a red box. The footer of the form includes the text "© 2021 CSG Forte Payments, Inc." and links for "Security", "Privacy", and "TOS".

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

Delete Payment Method



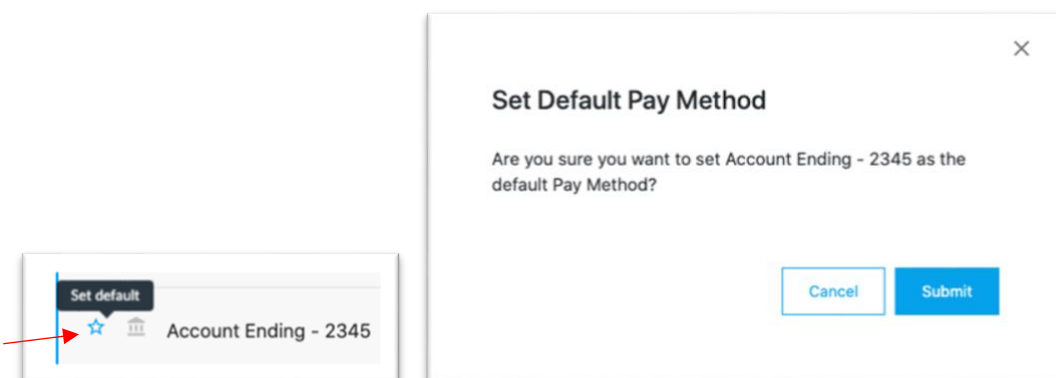
If you no longer need a payment method, you can remove it from the list. Click on the trash can icon to the right of the payment method to delete it. A pop up will appear asking you to confirm you want to delete the payment method. Click **Remove Method** to continue. The payment method will then be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



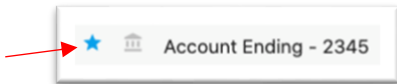
Please note that a payment **cannot** be deleted if it is the payment method that is enrolled in AutoPay. AutoPay is always tied to the default payment method. If you do want to delete a payment method that is associated with AutoPay, change the default payment method and it will tie AutoPay with that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

Default Payment Method

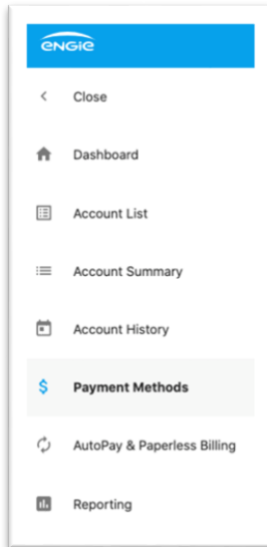
To change the default payment method, click on the star next to the account you would like to change it to.



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.

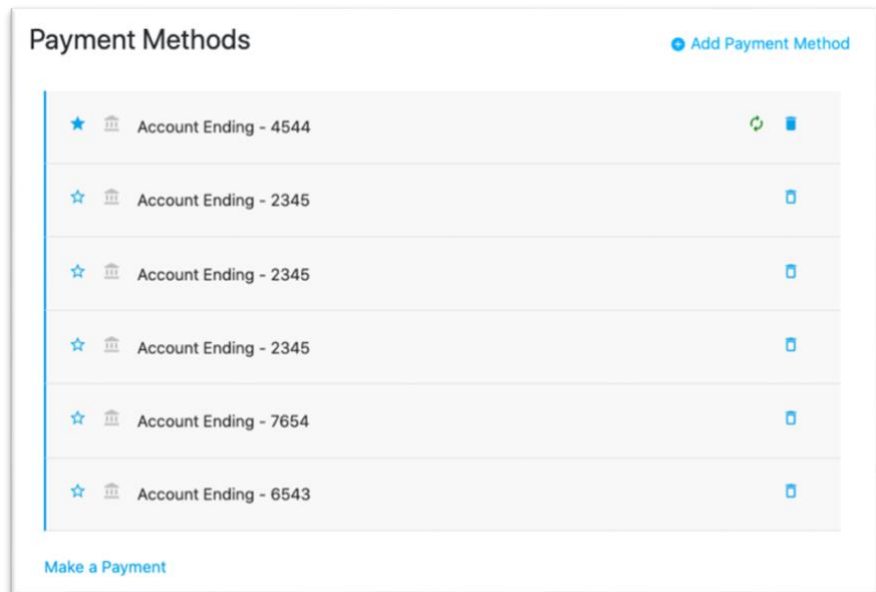


Add/Delete a Payment Method: Scenario 2



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 (ACH)

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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.

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.

Add Payment Method (Credit Card – Texas Customers Only)

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.

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ISO-NE

Click the tab **Card**.

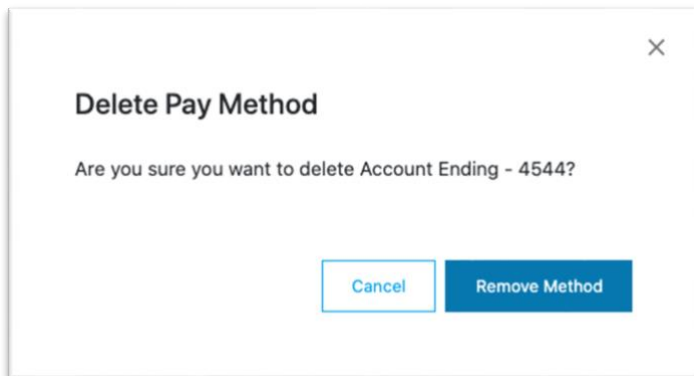
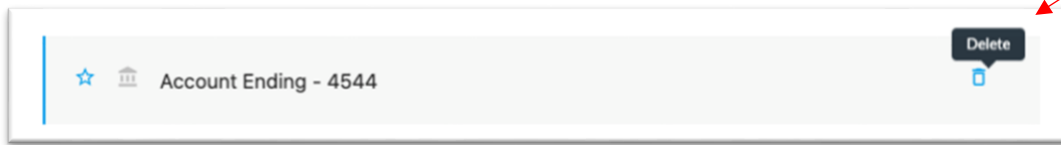
Please Note: There is a service fee of 4% for credit cards. We support Mastercard, American Express, and Discover Card.

Fill in the Credit Card Number, Expiration Date (2 digits for the month and 4 digits for the year), and Billing Information. Once all the fields are filled in properly, the save button will enable and turn green. Click **Save**.

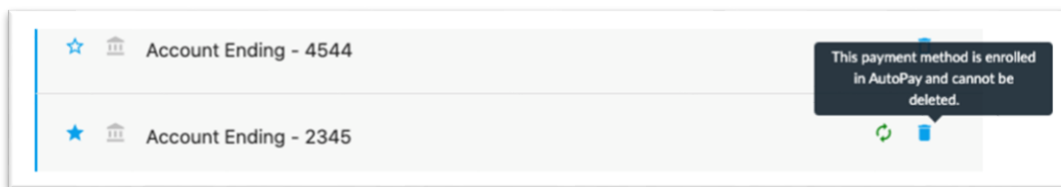
The screenshot shows a web form for adding a payment method. At the top, it says "ENGIE Resources LLC" and "Payment Method". There are two tabs: "Card" (selected) and "eCheck". The "Card" section has a card number field containing "*****0005" and an expiration date field containing "02 2025". Below these are logos for Mastercard, American Express, and Discover. The "Billing Information" section has a dropdown menu set to "United States of America". Below that are three text input fields: "Cupcakes R Us", "Betty Crocker", and "77059". At the bottom right, a green "Save" button is highlighted with a red rectangular box. The footer of the form includes "© 2021 CSG Forte Payments, Inc." and links for "Security", "Privacy", and "TOS".

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

Delete Payment Method



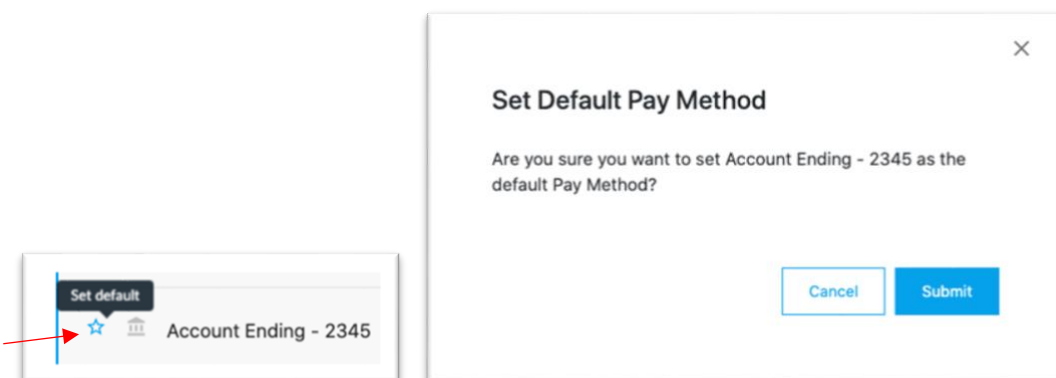
If you no longer need a payment method, you can remove it from the list. Click on the trash can icon to the right of the payment method to delete it. A pop up will appear asking you to confirm you want to delete the payment method. Click **Remove Method** to continue. The payment method will then be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



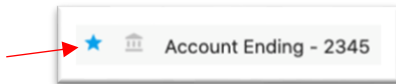
Please note that a payment **cannot** be deleted if it is the payment method that is enrolled in AutoPay. AutoPay is always tied to the default payment method. If you do want to delete a payment method that is associated with AutoPay, change the default payment method and it will tie AutoPay with that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

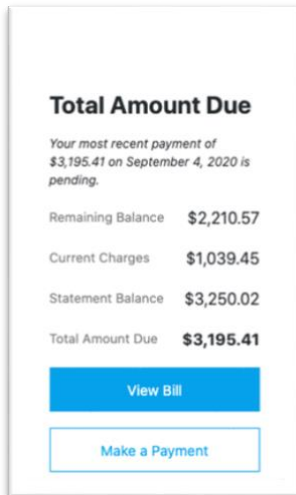


A pop up will appear, asking you to confirm you want to set it as the default pay method. Select **Submit** to continue. A blue star icon will now appear next to the new default pay method.



Make a Payment (ACH and Credit Cards)

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



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

Total Amount Due

\$3,195.41

AutoPay applied for Jul 17

[View Bill](#)

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

Payment Amount ▼

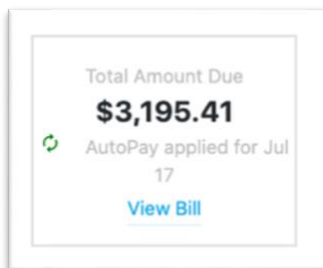
Payment Date

9/18/2020 📅

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

Payment Method ▼

Submit Payment

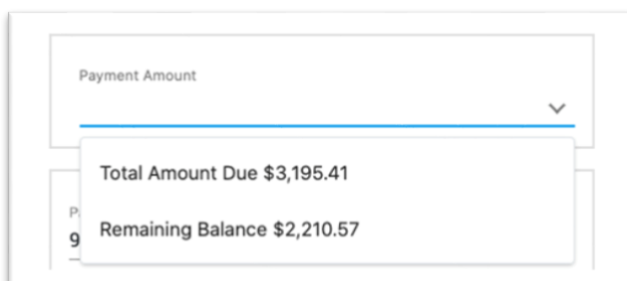


The top section will show your total amount due and if it is enrolled in AutoPay, a message will appear here to indicate that. You can still proceed even though you are enrolled in AutoPay if you want to make a one-time payment.

[View Bill](#)

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

Payment Amount



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

Payment Date

Payment Date
9/18/2020

SEP 2020

S M T W T F S

SEP

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

your due date. Please

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

Payment Method

Payment Method

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

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

Please note: credit card payments are only for Texas customers at this time.

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.

When selecting a credit card payment method, please note there is a **credit card service amount** that will automatically calculate and populate.

Payment Method	Amex Credit Card - 0005
Credit Card Service Fee	\$15.49
Total Amount	\$402.80

A service fee of 4% will be charged on all credit card payments. (\$2.00 minimum).

[Cancel](#) [Submit Payment](#)

Click **Submit Payment**. A confirmation will pop up with an authorization number.

Update Billing Address

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

LLC - 00000

Account Activity

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

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

Account Balance **\$3,195.41**

[View Statement](#)

[Make a Payment](#)

Update Billing Address

Contact

Service Address
GRANVILLE, NY 12832

Billing Address
Ste 2000
Houston, TX 77002

Contact
Contact Type: Billing

Billing Email Address
test@test.com

Account Settings

Service Start Date
Dec 1, 2019

Account Status
Account Accepted

Billing Type
Separate Bills

Tax Status
Tax Exempt

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

Update Billing Address

Apply a single billing address to multiple accounts

Selected Accounts: 00000

Address Line 1: _____

Address Line 2: _____

City: _____ State: _____

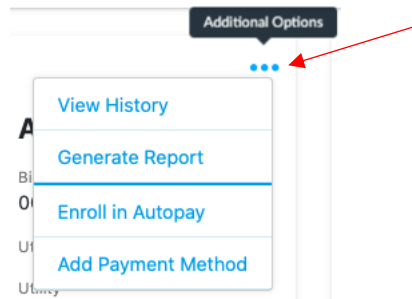
Postal Code: _____

Billing Email Address: _____

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

View Account History

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



Click on the **View History** option.

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

A screenshot of a web interface showing the account history search and results page. At the top, there is a search bar with fields for 'Account' (00000), 'From Date' (6/20/2020), and 'To Date' (9/18/2020). A blue 'Search' button is to the right. Below the search bar is a table with columns: BILLING ACCOUNT, TYPE, STATUS, PAYMENT AMOUNT, TRANSACTION DATE, STATEMENT PERIOD, USAGE, CURRENT CHARGES, and STATEMENT BALANCE. The table contains 12 rows of data. At the bottom, there is a pagination control showing '1 to 10 of 12' and 'Page 1 of 2'. Below the pagination, there is a 'Rows per page' dropdown set to '10' and an 'Export to Excel' button.

BILLING ACCOUNT	TYPE	STATUS	PAYMENT AMOUNT	TRANSACTION DATE	STATEMENT PERIOD	USAGE	CURRENT CHARGES	STATEMENT BALANCE
00000	eCheck	Pending	(\$3,195.41)	09/04/2020				
00000	eCheck	Pending	(\$3,400.23)	09/03/2020				
00000	eCheck	Pending	(\$3,195.41)	09/03/2020				
00000	eCheck	Pending	(\$3,195.41)	09/02/2020				
00000	eCheck	Cancelled	(\$2,210.57)	07/15/2020				
00000	eCheck	Cancelled	(\$2,210.57)	07/13/2020				
00000	eCheck	Cancelled	(\$2,210.57)	07/13/2020				
00000	eCheck	Cancelled	(\$2,210.57)	07/10/2020				
00000	eCheck	Cancelled	(\$2,210.57)	07/10/2020				
00000	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: 00000 From Date: 6/20/2020 To Date: 9/18/2020 Search: can


BILLING ACCOUNT	TYPE	STATUS	PAYMENT AMOUNT	TRANSACTION DATE	STATEMENT PERIOD	USAGE	CURRENT CHARGES	STATEMENT BALANCE
00000	eCheck	Cancelled	(\$2,210.57)	07/15/2020				
00000	eCheck	Cancelled	(\$2,210.57)	07/13/2020				
00000	eCheck	Cancelled	(\$2,210.57)	07/13/2020				
00000	eCheck	Cancelled	(\$2,210.57)	07/10/2020				
00000	eCheck	Cancelled	(\$2,210.57)	07/10/2020				
00000	eCheck	Cancelled	(\$2,210.57)	07/10/2020				
00000	eCheck	Cancelled	(\$2,210.57)	07/10/2020				
00000	eCheck	Cancelled	(\$2,210.57)	07/10/2020				
00000	eCheck	Cancelled	(\$2,210.57)	07/10/2020				

1 to 8 of 8 Page 1 of 1

Cancel a Pending Payment

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

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

00000	eCheck	Scheduled 	05/27/2020	(\$3,047.39)	\$0.00
00000	eCheck	Pending	05/27/2020	(\$3,047.39)	\$0.00

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

✕

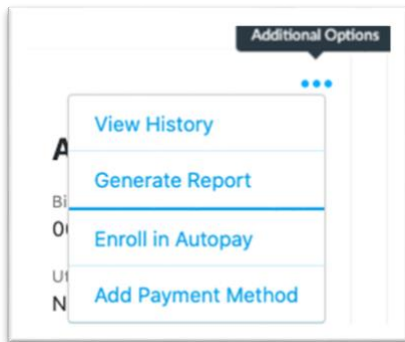
Cancel Scheduled Payment

Are you sure you want to cancel this payment?

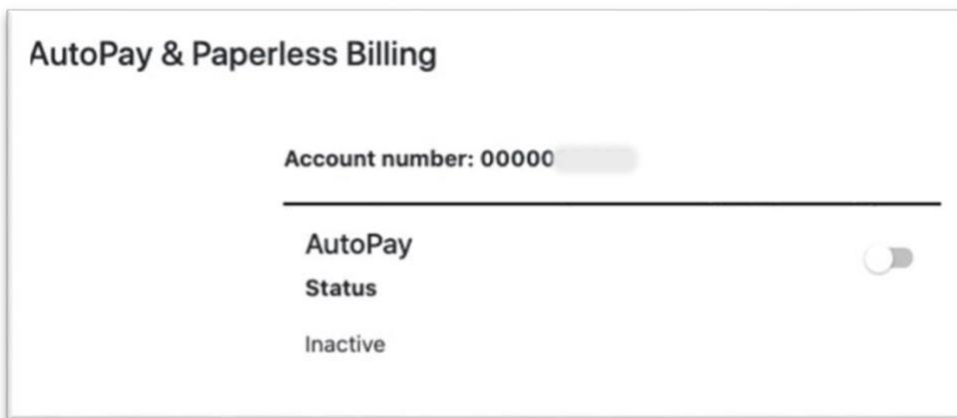
Don't Cancel
Cancel Payment

Enroll in AutoPay

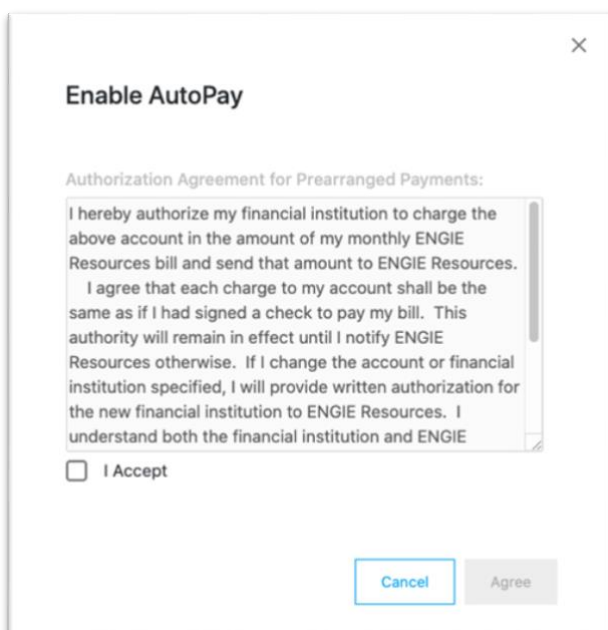
When you are on your account detail view, click on the three horizontal blue dots at the top of **Account Info** tile.



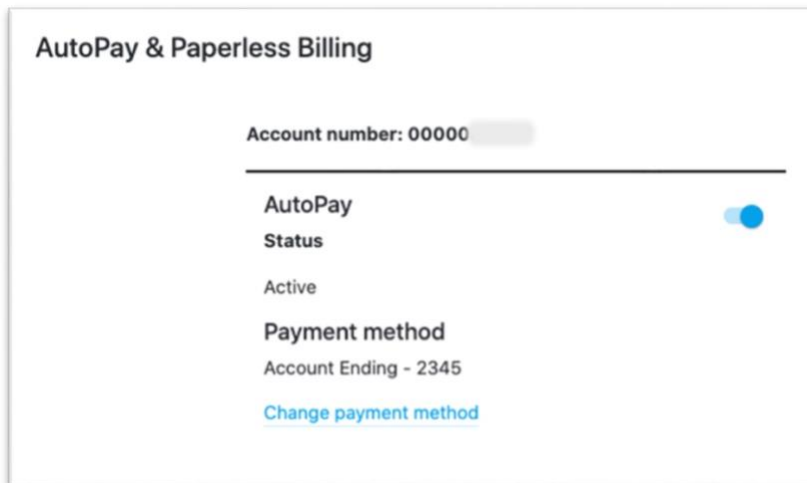
Click the option **Enroll in AutoPay**. This will take you to the **AutoPay & Paperless Billing** page for that specific account.



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

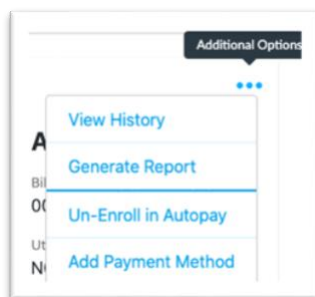


The toggle is now on and active with the default payment method used.

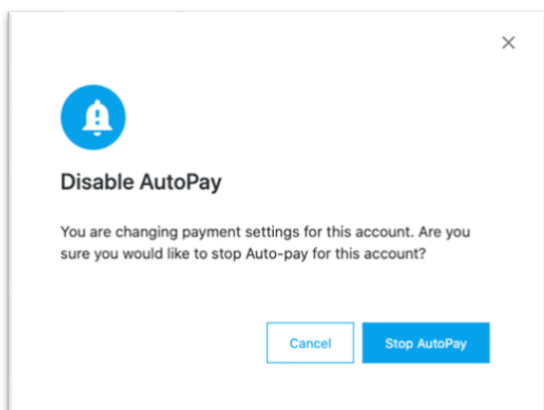


Un-Enroll in AutoPay

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



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



The toggle is now off and the AutoPay is off.

AutoPay

Status

Inactive



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.

Total Amount Due

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

Remaining Balance **\$2,540.13**

Current Charges **\$793.56**

Statement Balance **\$3,333.69**

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

[View Bill](#)

[Make a Payment](#)

View History

Generate Report

Share Account


Transfer Account

Release Account

Enroll in Autopay

Add Payment Method

Enroll in Paperless Billing



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


AutoPay & Paperless Billing

Account number:

AutoPay

Status

Inactive




Paperless billing

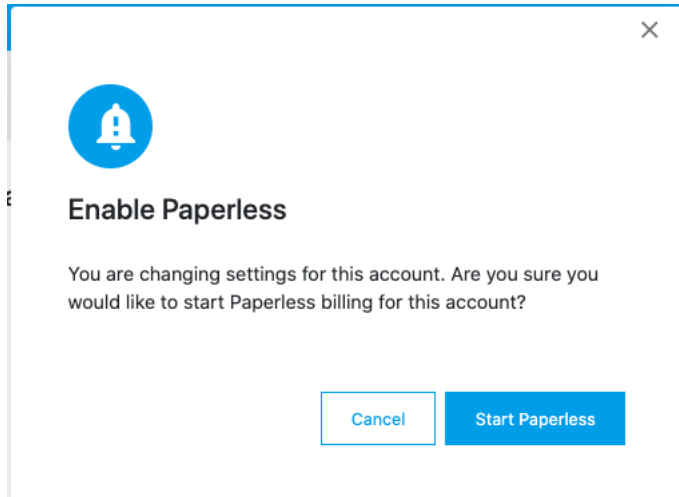
View your bill details anytime. We'll send you notices when your bill is ready.

E-Bill Delivery Address

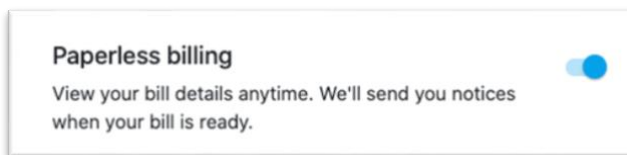
email address



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

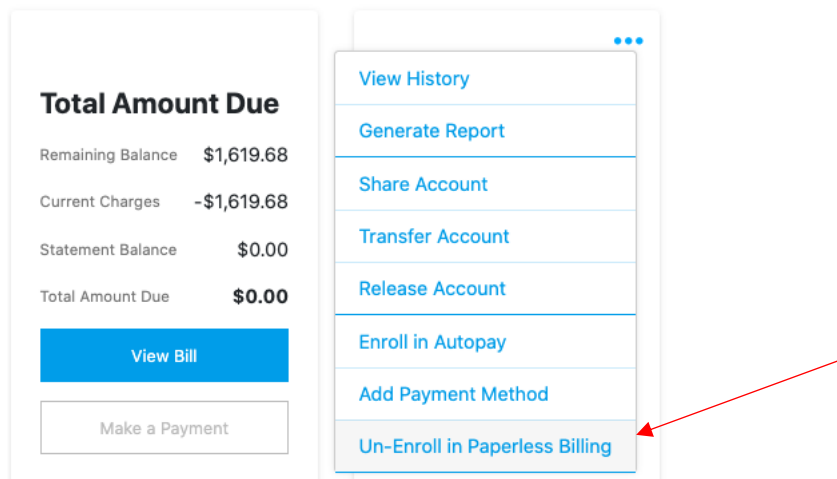


Click **Start Paperless** to continue and now the toggle is on and you are enrolled.



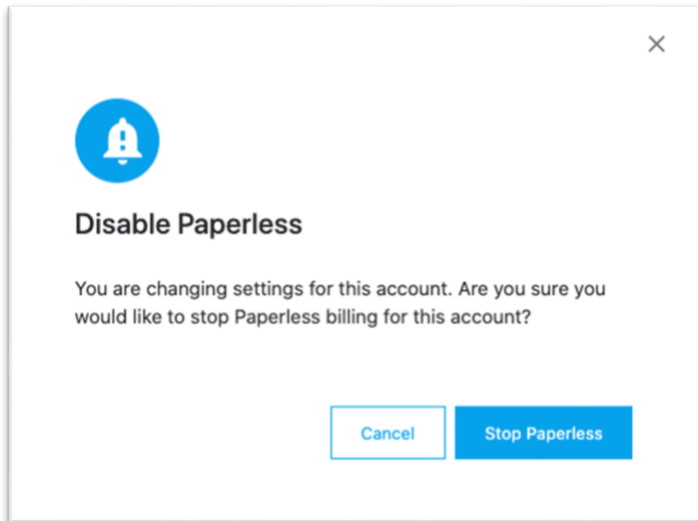
Un-Enroll in Paperless Billing

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

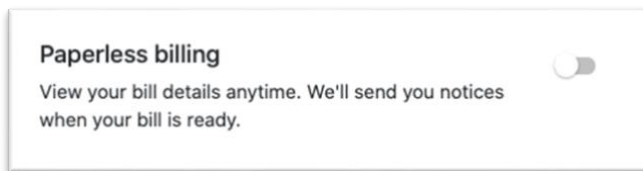


Click on **Un-Enroll in Paperless Billing**. This will take you to the AutoPay & Paperless Billing page.

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



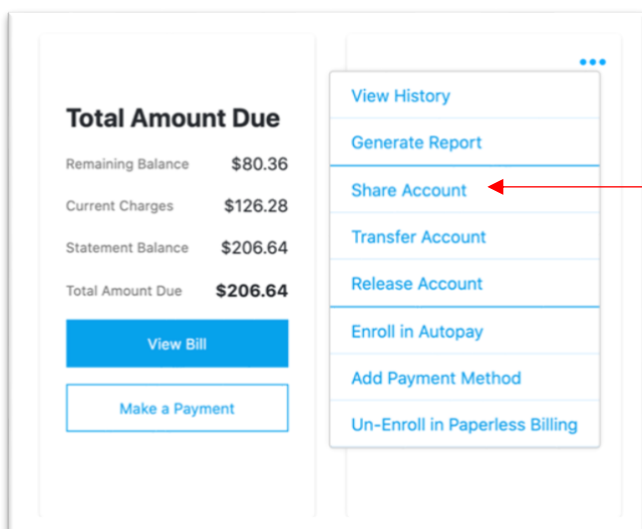
Click **Stop Paperless** to continue and now the toggle is off and you will start receiving paper bills with the next billing cycle.



Share Account(s)

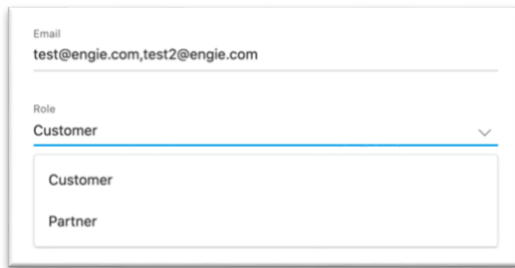
User this feature if you would like to share an account to another email/user and also have it on your account list view to access.

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**.



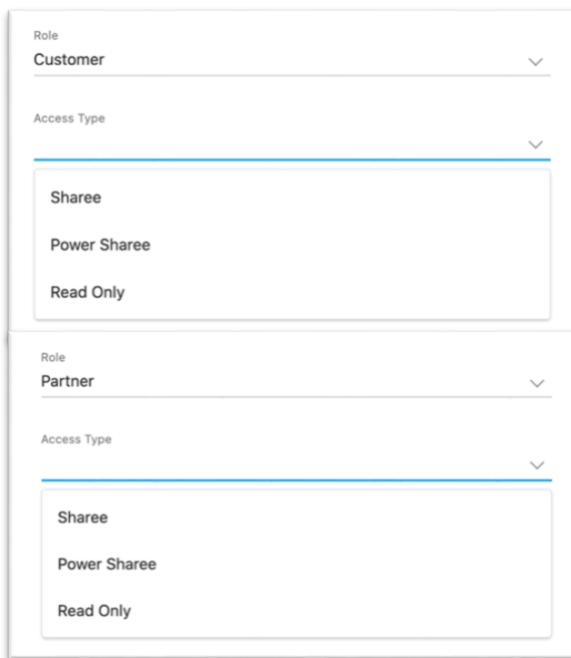
The **Share Accounts** screen will appear where you can enter one or more email address in which you want to share the specified account with.

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



The screenshot shows a form with an 'Email' field containing 'test@engie.com, test2@engie.com'. Below it is a 'Role' dropdown menu currently set to 'Customer'. The dropdown menu is open, showing two options: 'Customer' and 'Partner'.

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



The first screenshot shows the 'Role' dropdown set to 'Customer' and the 'Access Type' dropdown open with 'Sharee' selected. The second screenshot shows the 'Role' dropdown set to 'Partner' and the 'Access Type' dropdown open with 'Sharee' selected. Both screenshots show the same three options: 'Sharee', 'Power Sharee', and 'Read Only'.

- Sharee

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

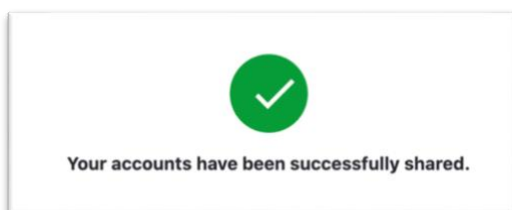
- Power Sharee

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

- 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**.

Total Amount Due

Remaining Balance	\$80.36
Current Charges	\$126.28
Statement Balance	\$206.64
Total Amount Due	\$206.64

View History
Generate Report
Transfer Account
Release Account
Enroll in Autopay
Add Payment Method
Un-Enroll in Paperless Billing

View Bill
Make a Payment

Transfer Accounts

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

Accounts Selected
00000

Email
test@engle.com, test1@engle.com

Role

Access Type

Cancel Transfer

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

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

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

- Owner

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

- Sharee

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

Role
Customer

Access Type

- Owner
- Sharee
- Power Sharee
- Read Only

- Power Sharee

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

- Read Only

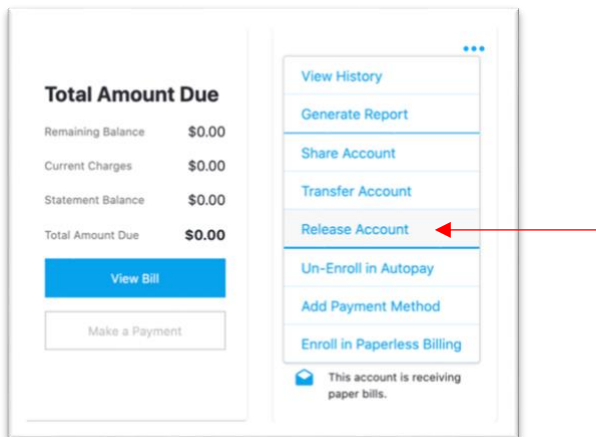
With Read Only access, a user can view all information pertinent to the account, however, they are only able to edit their user profile.

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

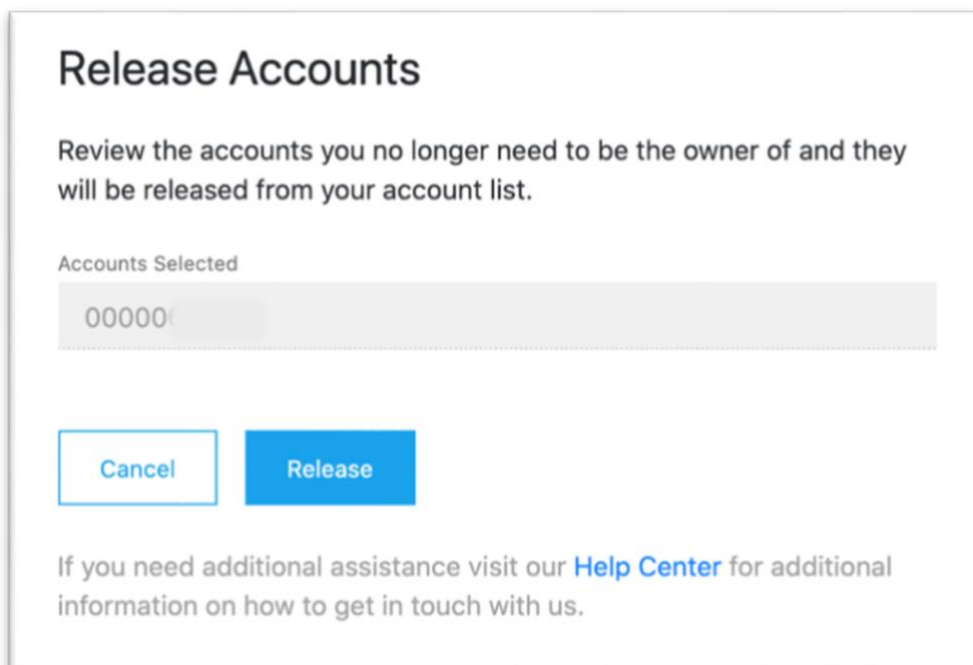
Release Account(s)

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

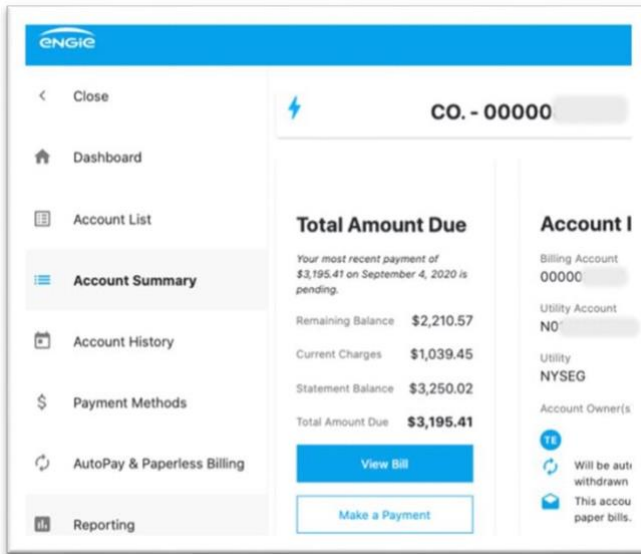
From the account detail view, click on the three blue horizontal dots on the right of the **Account Info** tile to display additional options. Select **Release Account**.



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



Generating a Report



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

Generate Report

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

Select Billed Dates

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

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

Select Report Data Fields

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

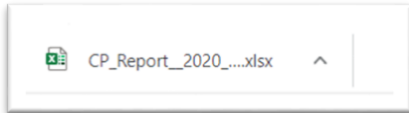
The page will display fields under two columns/sections: **Billing** and **Meter** information.

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



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.

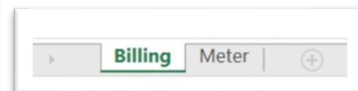


The excel file will have 2 tabs, one for **Billing Info** and one for **Meter Info**.

Billing Information

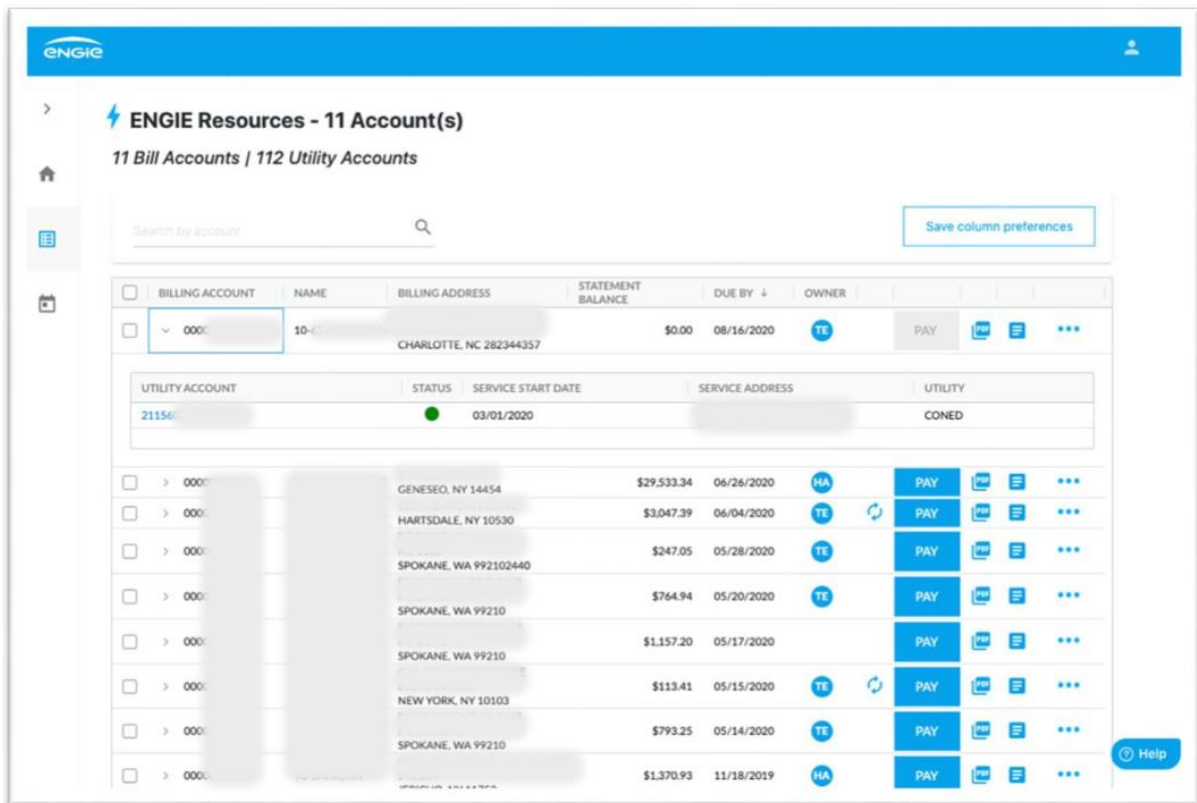
Customer Name	Supplier Account Number	Utility Account Number
CO.	18 3 NO.	
CO.	18 3 NO.	
CO.	18 3 NO.	
CO.	18 3 NO.	
CO.	18 3 NO.	
CO.	18 3 NO.	

At the bottom of the spreadsheet, there are two tabs: "Billing" (selected) and "Meter".



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

This view is when a user has summary bill accounts.



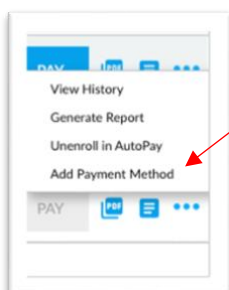
The screenshot shows the ENGIE account summary page. At the top, it says "ENGIE Resources - 11 Account(s)" and "11 Bill Accounts | 112 Utility Accounts". There is a search bar and a "Save column preferences" button. Below is a table of accounts. The first row is a bill account with a balance of \$0.00. Below it is a utility account table with one row showing a utility account with status "CONED". The main table lists several bill accounts with their respective balances and due dates. Each row has a "PAY" button and a three-dot menu icon.

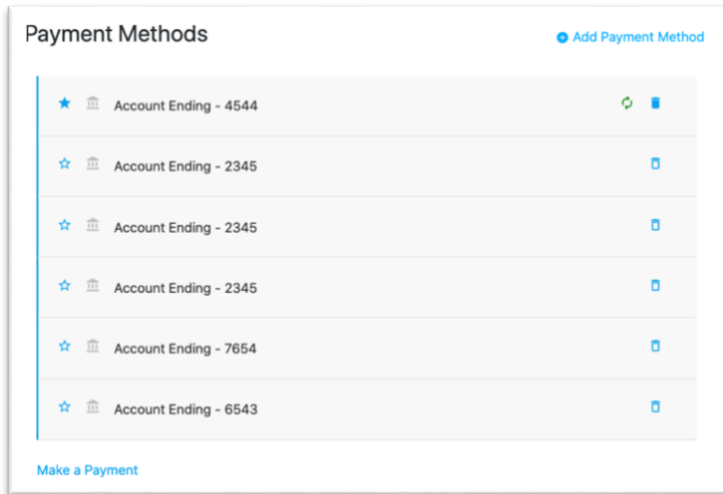
BILLING ACCOUNT	NAME	BILLING ADDRESS	STATEMENT BALANCE	DUE BY	OWNER			
0000	10-	CHARLOTTE, NC 282344357	\$0.00	08/16/2020	TE	PAY		
UTILITY ACCOUNT		STATUS	SERVICE START DATE	SERVICE ADDRESS	UTILITY			
21156		●	03/01/2020		CONED			
0000		GENESE0, NY 14454	\$29,533.34	06/26/2020	HA	PAY		
0000		HARTSDALE, NY 10530	\$3,047.39	06/04/2020	TE	PAY		
0000		SPOKANE, WA 992102440	\$247.05	05/28/2020	TE	PAY		
0000		SPOKANE, WA 99210	\$764.94	05/20/2020	TE	PAY		
0000		SPOKANE, WA 99210	\$1,157.20	05/17/2020	TE	PAY		
0000		SPOKANE, WA 99210	\$113.41	05/15/2020	TE	PAY		
0000		NEW YORK, NY 10103	\$793.25	05/14/2020	TE	PAY		
0000		SPOKANE, WA 99210	\$1,370.93	11/18/2019	HA	PAY		

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

Add/Delete a Payment Method: Scenario 1

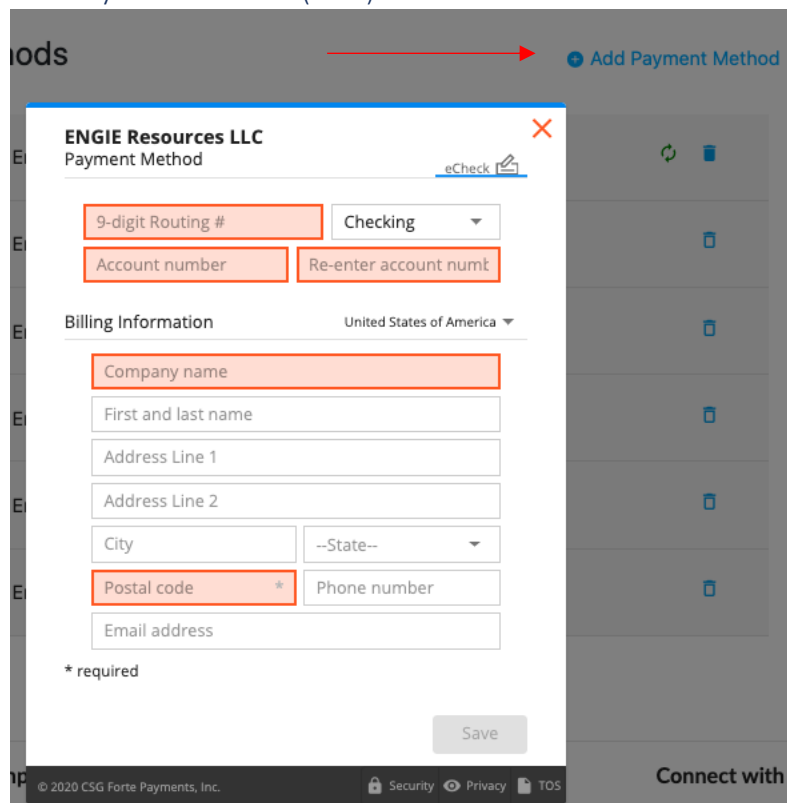
From your account list view, click on the three blue horizontal dots to display more options. Click on the **Add Payment Method** option.





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

Add Payment Method (ACH)



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.






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.

Add Payment Method (Credit Card – Texas Customers Only)

Payment Methods

[Add Payment Method](#)

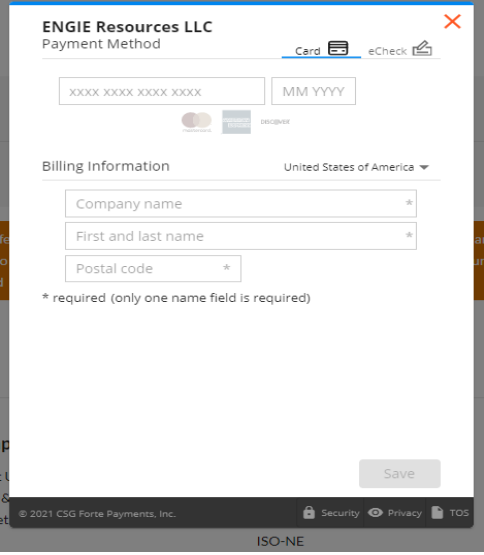
☆  Account Ending - 2322	
★  Account Ending - 6785	 

 If you have an ACH debit block feature on your business checking account, please instruct your bank or financial institution to authorize ACH Company ID 5330903620 to draft your checking account. This Company ID must be authorized by your financial institution or your payment may fail or be returned



[Make a Payment](#)

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.



ENGIE Resources LLC
Payment Method

Card  eCheck 

XXXX XXXX XXXX XXXX MM YYYY

Billing Information United States of America ▼

Company name *

First and last name *

Postal code *

* required (only one name field is required)

Save

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ISO-NE

Click the tab **Card**.




Please Note: There is a service fee of 4% for credit cards. We support Mastercard, American Express, and Discover Card.

Fill in the Credit Card Number, Expiration Date (2 digits for the month and 4 digits for the year), and Billing Information. Once all the fields are filled in properly, the save button will enable and turn green. Click **Save**.

ENGIE Resources LLC
Payment Method ✕

Card  eCheck 

*****0005 02 2025

Billing Information United States of America ▾

Cupcakes R Us

Betty Crocker

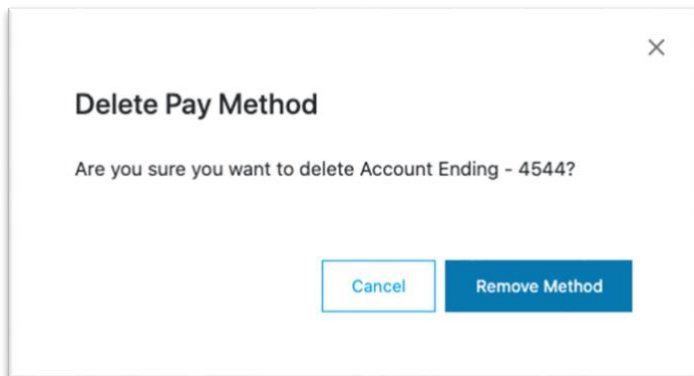
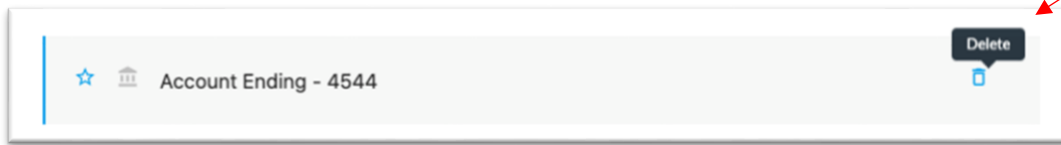
77059

Save

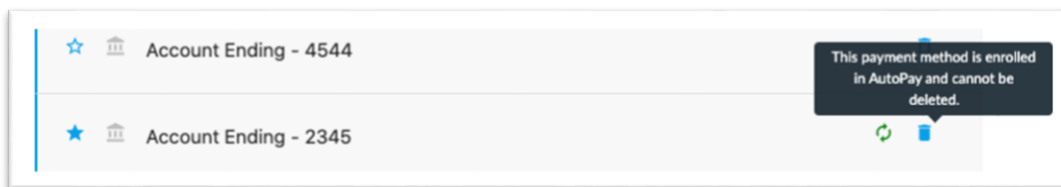
© 2021 CSG Forre Payments, Inc. [Security](#) [Privacy](#) [TOS](#)

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

Delete Payment Method



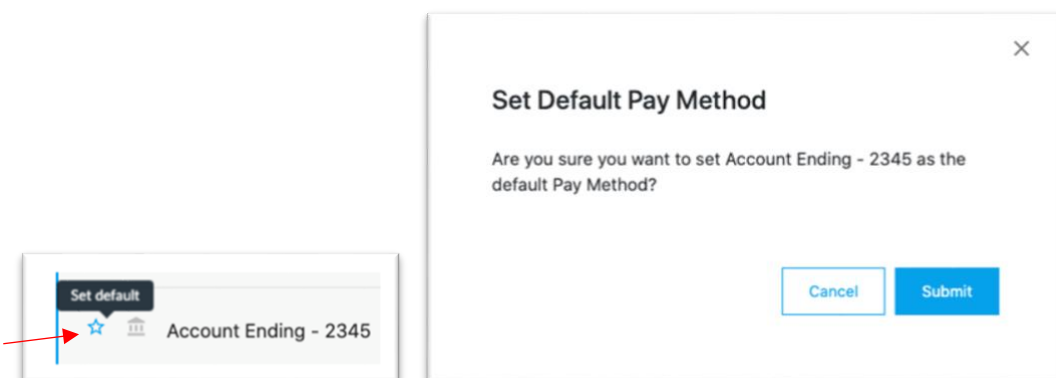
If you no longer need a payment method, you can remove it from the list. Click on the trash can icon to the right of the payment method to delete it. A pop up will appear asking you to confirm you want to delete the payment method. Click **Remove Method** to continue. The payment method will then be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



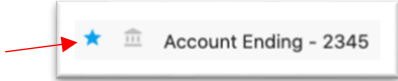
Please note that a payment **cannot** be deleted if it is the payment method that is enrolled in AutoPay. AutoPay is always tied to the default payment method. If you do want to delete a payment method that is associated with AutoPay, change the default payment method and it will tie AutoPay with that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

Default Payment Method

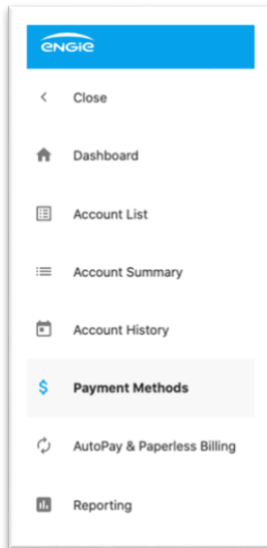
To change the default payment method, click on the star next to the account you would like to change it to.



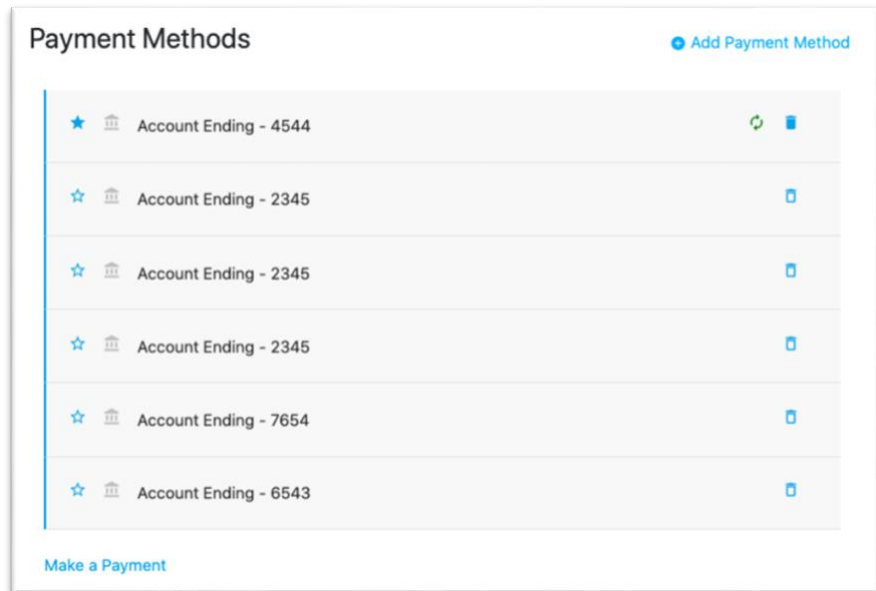
A pop up will appear, asking you to confirm you want to set it as the default pay method. Select **Submit** to continue. A blue star icon will now appear next to the new default pay method.



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 (ACH)

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.






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.

Add Payment Method (Credit Card – Texas Customers Only)

Payment Methods

[Add Payment Method](#)

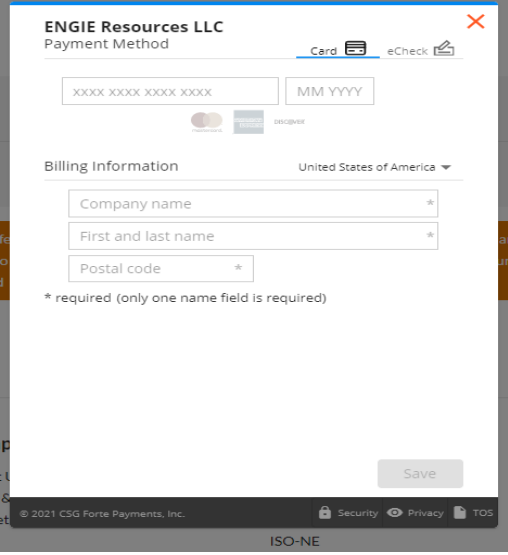
☆  Account Ending - 2322	
★  Account Ending - 6785	 

 If you have an ACH debit block feature on your business checking account, please instruct your bank or financial institution to authorize ACH Company ID 5330903620 to draft your checking account. This Company ID must be authorized by your financial institution or your payment may fail or be returned



[Make a Payment](#)

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.



ENGIE Resources LLC
Payment Method

Card  eCheck 

XXXX XXXX XXXX XXXX MM YYYY

Billing Information United States of America

Company name *

First and last name *

Postal code *

* required (only one name field is required)

Save

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ISO-NE

Click the tab **Card**.




Please Note: There is a service fee of 4% for credit cards. We support Mastercard, American Express, and Discover Card.

Fill in the Credit Card Number, Expiration Date (2 digits for the month and 4 digits for the year), and Billing Information. Once all the fields are filled in properly, the save button will enable and turn green. Click **Save**.

ENGIE Resources LLC
Payment Method ✕

Card  eCheck 

*****0005 02 2025

Billing Information United States of America ▾

Cupcakes R Us

Betty Crocker

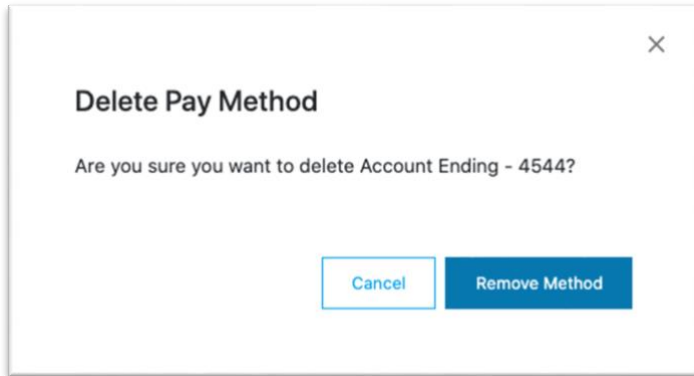
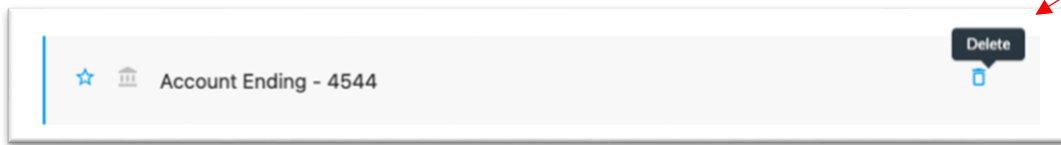
77059

Save

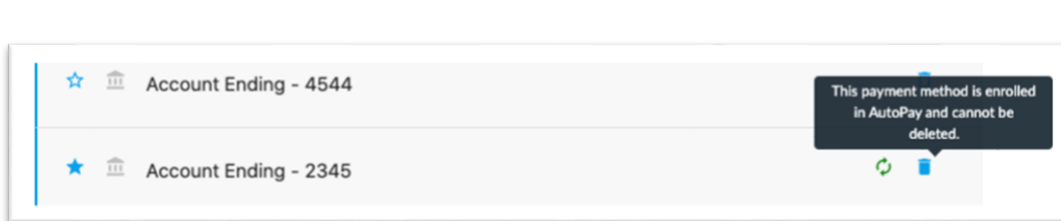
© 2021 CSG Forre Payments, Inc. [Security](#) [Privacy](#) [TOS](#)

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

Delete Payment Method



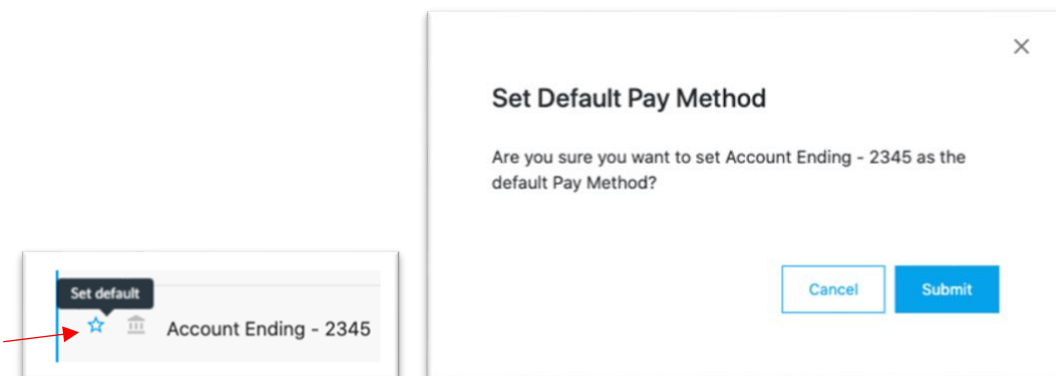
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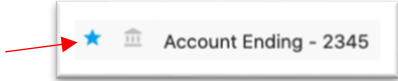
Please note that a payment **cannot** be deleted if it is the payment method that is enrolled in AutoPay. AutoPay is always tied to the default payment method. If you do want to delete a payment method that is associated with AutoPay, change the default payment method and it will tie AutoPay with that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

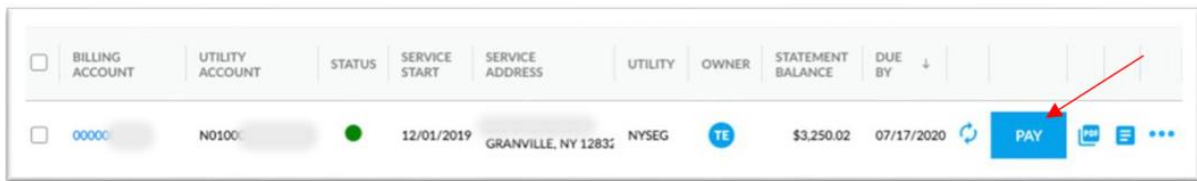


A pop up will appear, asking you to confirm you want to set it as the default pay method. Select **Submit** to continue. A blue star icon will now appear next to the new default pay method.

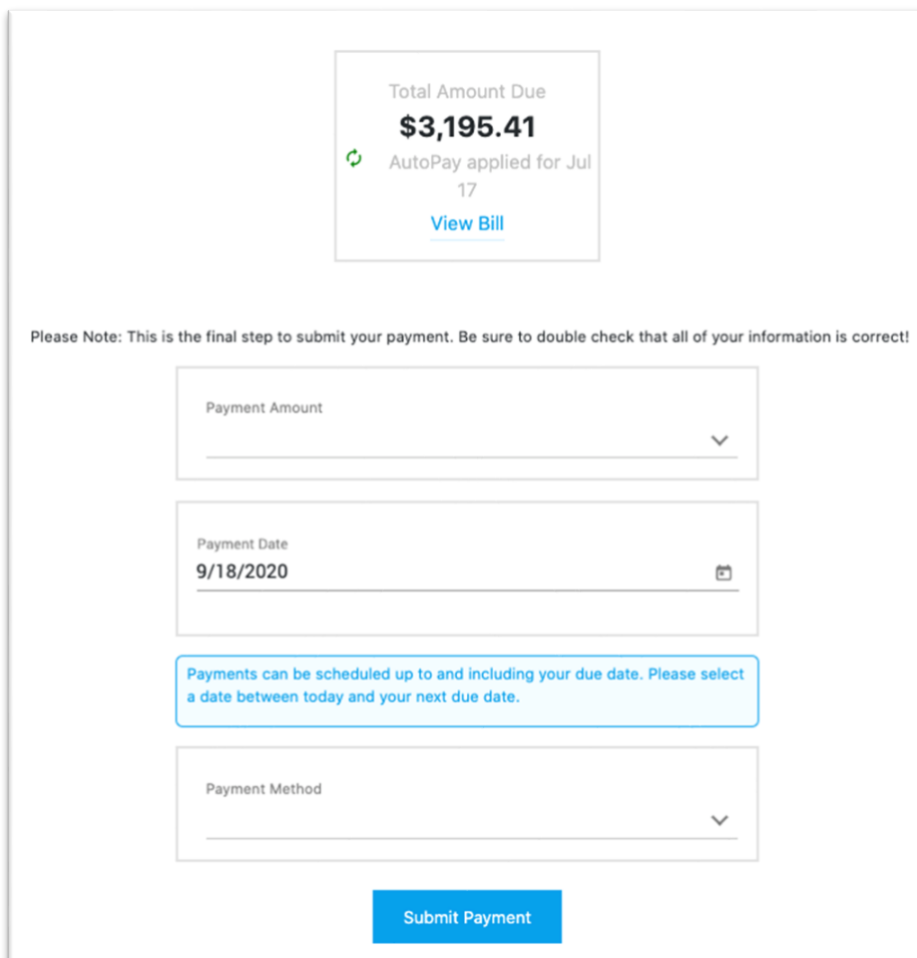
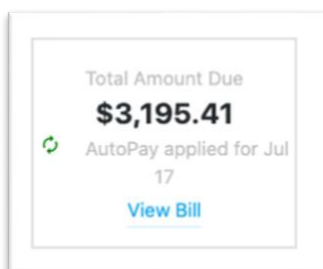


Make a Payment (ACH and Credit Cards)

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.

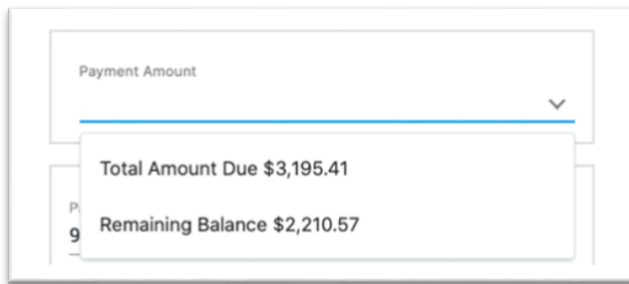
A screenshot of the payment screen. At the top, a box displays 'Total Amount Due \$3,195.41' and 'AutoPay applied for Jul 17' with a 'View Bill' link. Below this is a 'Please Note' section. The main form contains three dropdown menus: 'Payment Amount', 'Payment Date' (set to 9/18/2020), and 'Payment Method'. A blue box provides instructions: 'Payments can be scheduled up to and including your due date. Please select a date between today and your next due date.' A blue 'Submit Payment' button is at the bottom.

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.

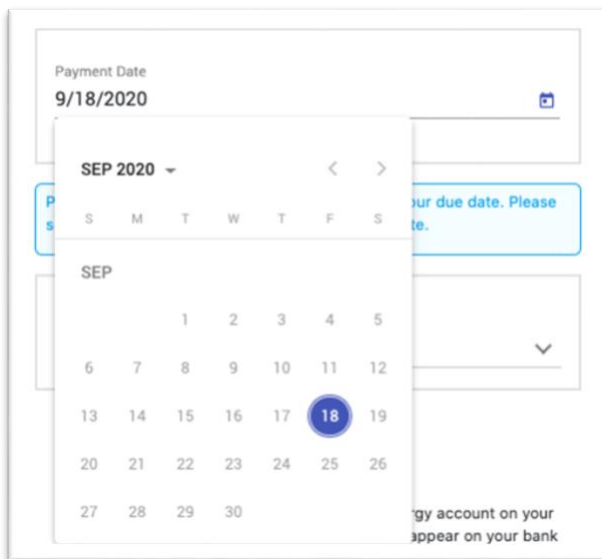
Payment Amount



The screenshot shows a dropdown menu for 'Payment Amount'. The menu is open, displaying two options: 'Total Amount Due \$3,195.41' and 'Remaining Balance \$2,210.57'. A blue horizontal line is visible above the first option.

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

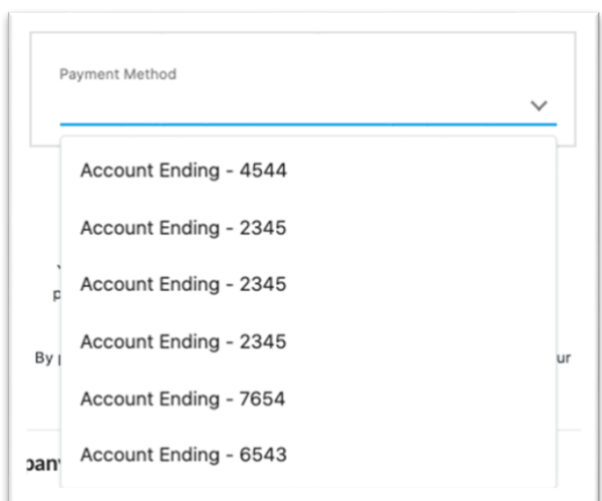
Payment Date



The screenshot shows a date picker for 'Payment Date'. The current date is 9/18/2020. A calendar for September 2020 is displayed, with the 18th selected. A blue box highlights the date 18. A blue tooltip message says 'Your due date. Please...'. A blue box highlights the date 18. A blue box highlights the date 18.

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

Payment Method



The screenshot shows a dropdown menu for 'Payment Method'. The menu is open, displaying a list of payment methods: 'Account Ending - 4544', 'Account Ending - 2345', 'Account Ending - 2345', 'Account Ending - 2345', 'Account Ending - 7654', and 'Account Ending - 6543'. A blue horizontal line is visible above the first option.

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.

Please note: credit card payments are only for Texas customers at this time.

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.

When selecting a credit card payment method, please note there is a **credit card service amount** that will automatically calculate and populate.

Payment Method
Amex Credit Card - 0005

Credit Card Service Fee ?
\$15.49

Total Amount
\$402.80

A service fee of 4% will be charged on all credit card payments. (\$2.00 minimum).

Cancel Submit Payment

Click **Submit Payment**. A confirmation will pop up with an authorization number.

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.

ENGIE

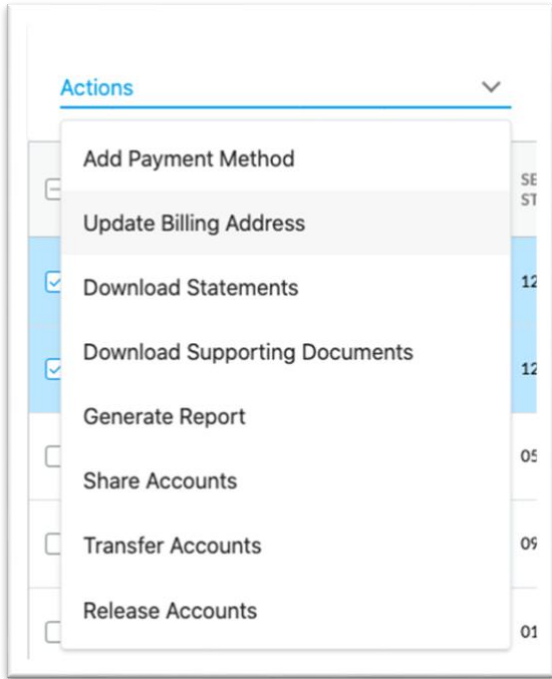
Inc. - 14 Account(s)

Search by account, name, address. Save column preferences

Actions

BILLING ACCOUNT	UTILITY ACCOUNT	STATUS	SERVICE START	SERVICE ADDRESS	UTILITY	OWNER	STATEMENT BALANCE	DUE BY					
<input checked="" type="checkbox"/>	000: [REDACTED]	N01: [REDACTED]	●	12/01/2019	GRANVILLE, NY 12832	NYSEG	TE	\$3,250.02	07/17/2020	RECYCLE	PAY	PDF	***
<input checked="" type="checkbox"/>	000: [REDACTED]	N01: [REDACTED]	●	12/01/2015	BUFFALO, NY 14221	NYSEG	TE	\$3,029.15	07/17/2020	RECYCLE	PAY	PDF	***

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

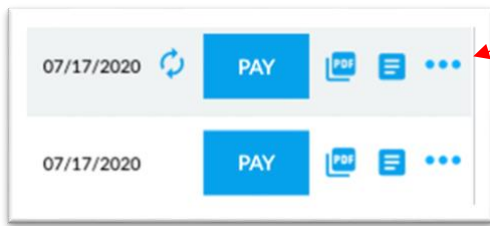


This will take you to the **Update Billing Address** page. Enter the information you would like updated, and press save. Once you go back to your account list view, the changes will be updated.

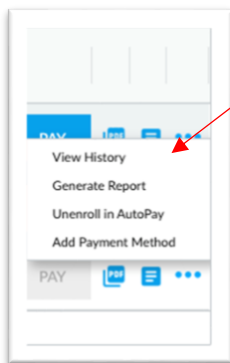
A screenshot of the 'Update Billing Address' form. The title is 'Update Billing Address' with the subtitle 'Apply a single billing address to multiple accounts'. On the left, under 'Selected Accounts', there is a text input field containing '0000'. The form has several input fields: 'Address Line 1', 'Address Line 2', 'City', 'State' (a dropdown menu with a downward arrow), 'Postal Code', and 'Billing Email Address'. At the bottom, there are two buttons: 'Cancel' and '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.

Account: 00000 From Date: 6/20/2020 To Date: 9/18/2020 Search Filter by type, status...

<input type="checkbox"/>	BILLING ACCOUNT	TYPE	STATUS	PAYMENT AMOUNT	TRANSACTION DATE	STATEMENT PERIOD	USAGE	CURRENT CHARGES	STATEMENT BALANCE
	00000	eCheck	Pending	(\$3,195.41)	09/04/2020				
	00000	eCheck	Pending	(\$3,400.23)	09/03/2020				
	00000	eCheck	Pending	(\$3,195.41)	09/03/2020				
	00000	eCheck	Pending	(\$3,195.41)	09/02/2020				
	00000	eCheck	Cancelled	(\$2,210.57)	07/15/2020				
	00000	eCheck	Cancelled	(\$2,210.57)	07/13/2020				
	00000	eCheck	Cancelled	(\$2,210.57)	07/13/2020				
	00000	eCheck	Cancelled	(\$2,210.57)	07/10/2020				
	00000	eCheck	Cancelled	(\$2,210.57)	07/10/2020				
	00000	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 to the **scheduled** payment

0000:	eCheck	Scheduled 	05/27/2020	(\$3,047.39)	\$0.00
-------	--------	---	------------	--------------	--------

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





Cancel Scheduled Payment

Are you sure you want to cancel this payment?


Share Account(s)

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

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

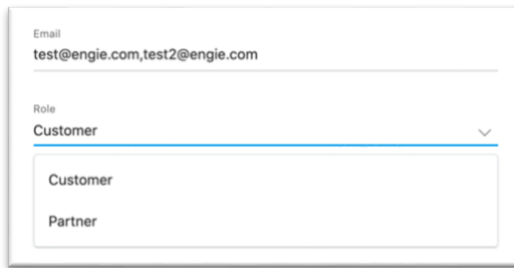
<input type="checkbox"/>	BILLING ACCOUNT	UTILITY ACCOUNT	STATUS	SERVICE START	SERVICE ADDRESS	UTILITY	OWNER	STATEMENT BALANCE	DUE BY			
<input type="checkbox"/>	0000:	5225		02/01/2020	PELHAM MANOR, NY	CONED		\$206.64	05/29/2020	<input type="button" value="PAY"/>		

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

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

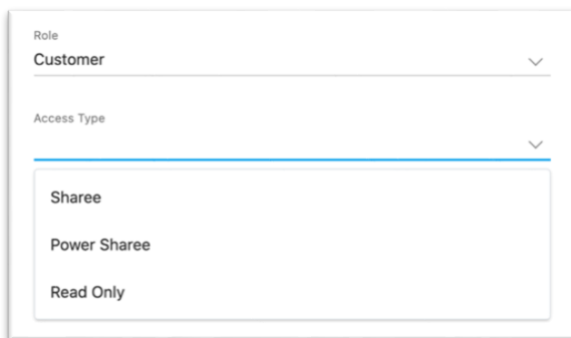
The **Share Accounts** screen will appear where you can enter one or more email address in which you want to share the specified account with.

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



A screenshot of a web form. At the top, there is an 'Email' field containing 'test@engie.com, test2@engie.com'. Below it is a 'Role' dropdown menu. The dropdown is currently set to 'Customer' and is open, showing a list of options: 'Customer' and '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.



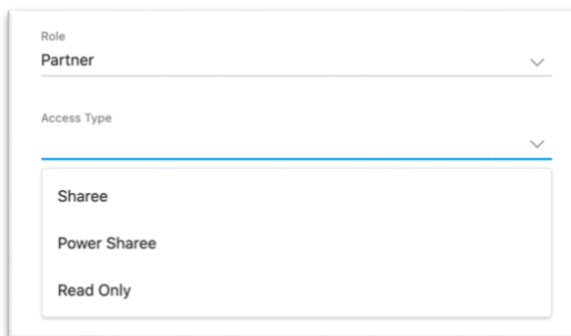
A screenshot of a web form showing the 'Access Type' dropdown menu. The 'Role' dropdown above it is set to 'Customer'. The 'Access Type' dropdown is open, showing three options: 'Sharee', 'Power Sharee', and 'Read Only'. 'Sharee' is selected.

- Sharee

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

- Power Sharee

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

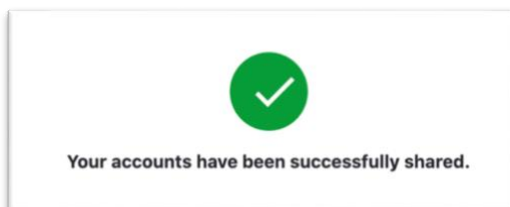


A screenshot of a web form showing the 'Access Type' dropdown menu. The 'Role' dropdown above it is set to 'Partner'. The 'Access Type' dropdown is open, showing three options: 'Sharee', 'Power Sharee', and 'Read Only'. 'Sharee' is selected.

- 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.

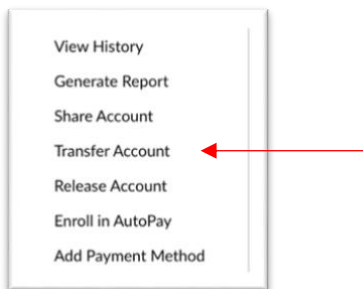
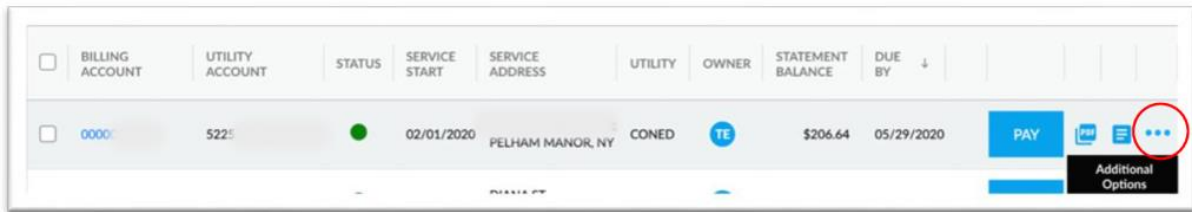
After selecting the Role and Access Type, Click **Share**. A message is displayed that the account(s) have been shared.



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.



Transfer Accounts

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

Accounts Selected

0000

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

Role

Access Type

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

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

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

- Owner

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

- Sharee

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

Role

Customer

Access Type

Owner

Sharee

Power Sharee

Read Only

- Power Sharee

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

- Read Only

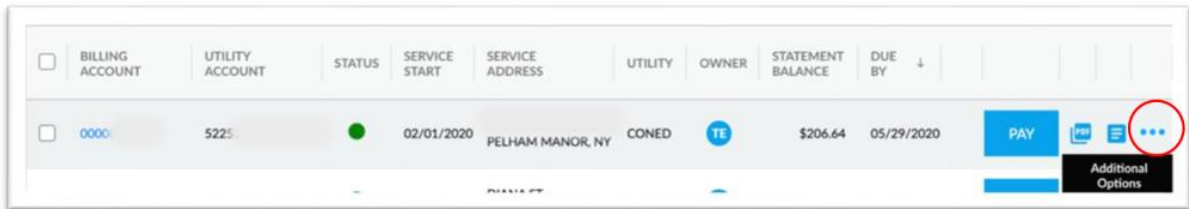
With Read Only access, a user can view all information pertinent to the account, however, they are only able to edit their user profile.

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

Release Account(s)

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

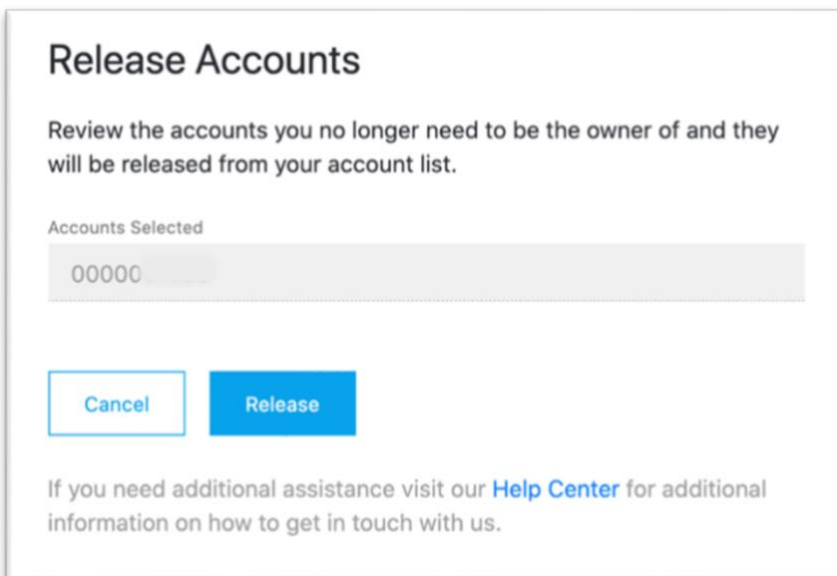
From the account list view, click on the three blue horizontal dots on the right of the account to display additional options.



<input type="checkbox"/>	BILLING ACCOUNT	UTILITY ACCOUNT	STATUS	SERVICE START	SERVICE ADDRESS	UTILITY	OWNER	STATEMENT BALANCE	DUE BY			
<input type="checkbox"/>	0000	5225	●	02/01/2020	PELHAM MANOR, NY	CONED	TE	\$206.64	05/29/2020	PAY	PDF	☰

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

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



Release Accounts

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

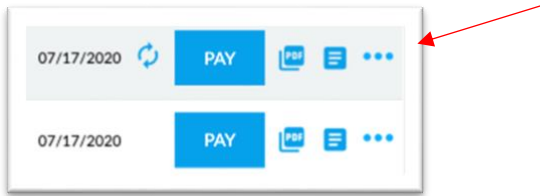
Accounts Selected

00000

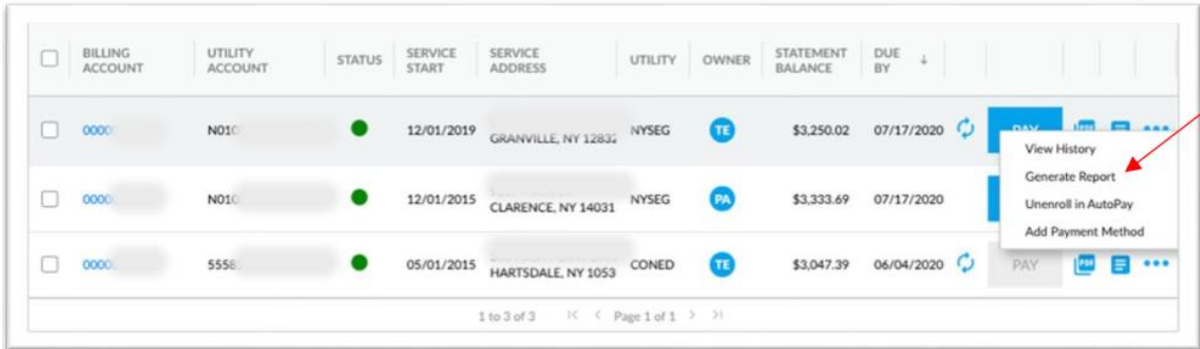
If you need additional assistance visit our [Help Center](#) for additional information on how to get in touch with us.

Generate Report

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



Click on the **Generate Report** option.



Generate Report

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

Select Billed Dates

Choose from date Choose to date

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

Select Report Data Fields

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

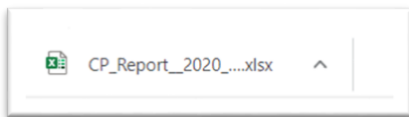
The page will display fields under two columns/sections: **Billing** and **Meter** information.

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

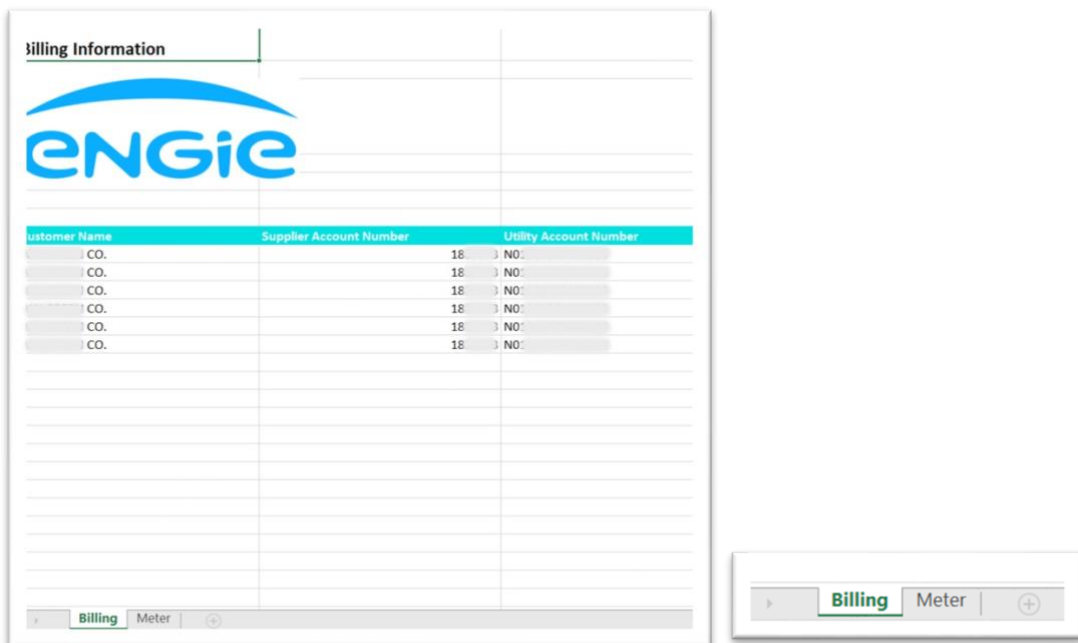


At the bottom of the page there is a toggle that you can turn on to save your preferences if you'd like to run the same report the next time you come into this page for the account.

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



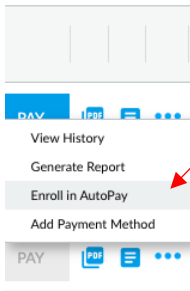
The excel file will have 2 tabs, one for **Billing Info** and one for **Meter Info**.



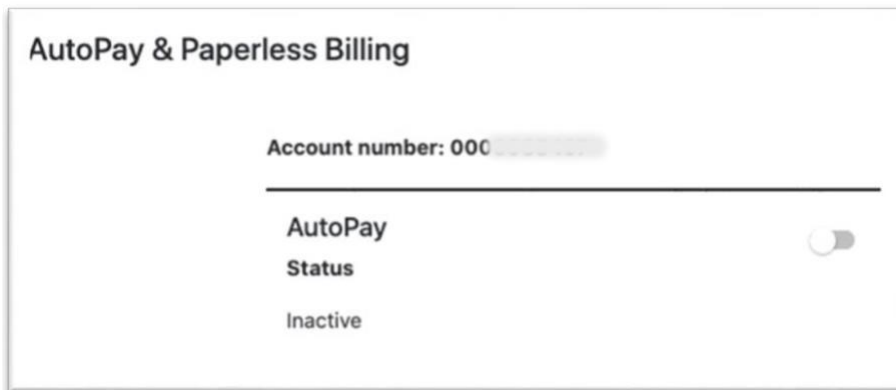
Enroll in AutoPay

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.

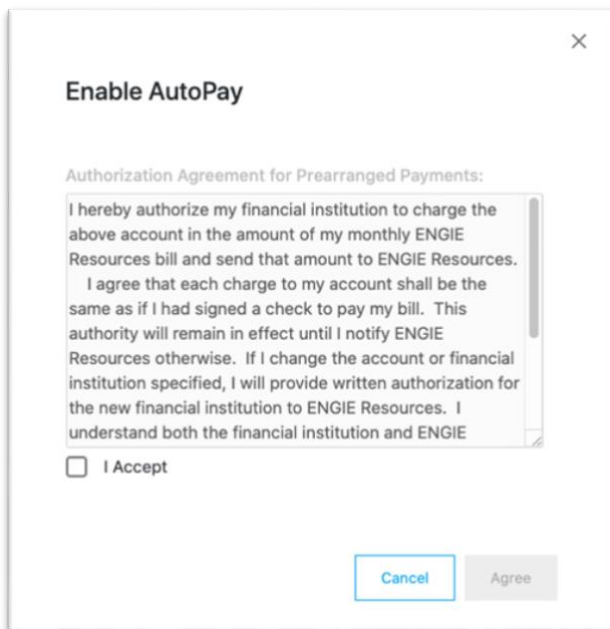




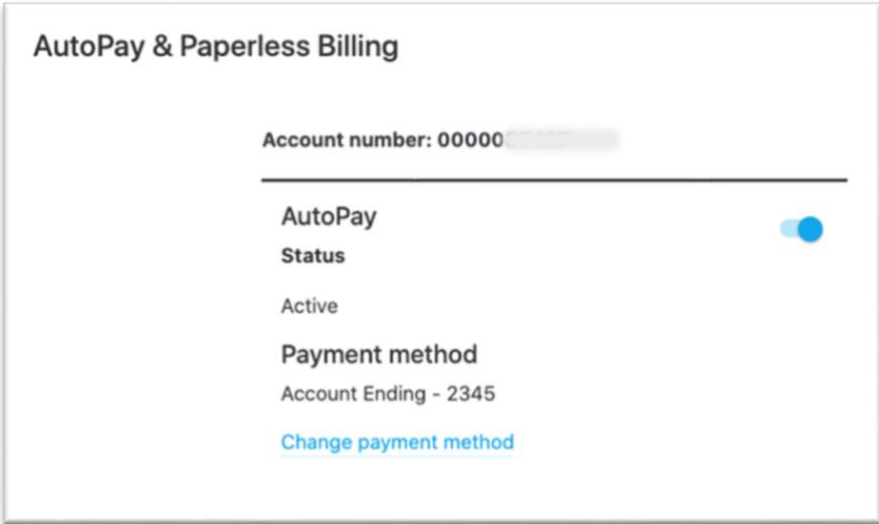
Click the option **Enroll in AutoPay**. This will take you to the **AutoPay & Paperless Billing** page for that specific account.



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.



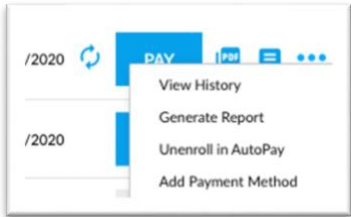
Un-Enroll in AutoPay

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

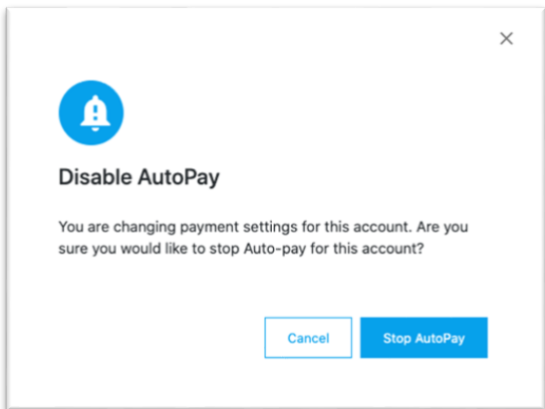


account. If an account is enrolled in AutoPay, there will be a blue icon stating it is enrolled.

Click Un-Enroll in AutoPay.



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



The toggle is now off and the AutoPay is off.

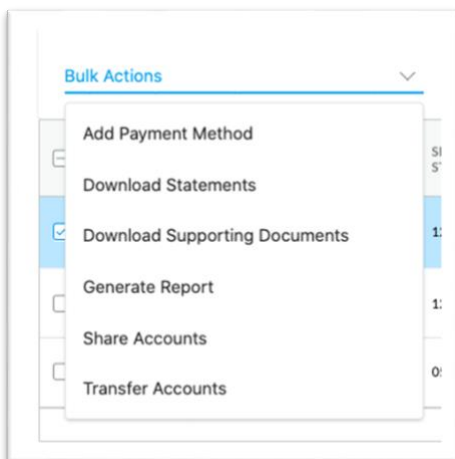


Bulk Actions

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

The screenshot shows a table of accounts with a 'Bulk Actions' dropdown menu open. The table has columns for 'BILLING ACCOUNT', 'NAME', 'BILLING ADDRESS', 'STATEMENT BALANCE', 'DUE BY', and 'OWNER'. Three rows are visible, each with a checked checkbox in the left margin. The dropdown menu is positioned above the table, showing a list of actions with checkboxes.

BILLING ACCOUNT	NAME	BILLING ADDRESS	STATEMENT BALANCE	DUE BY	OWNER	
> 0000		CHARLOTTE, NC 282344357	\$0.00	08/16/2020	TE	PAY
> 0000		GENESE0, NY 14454	\$29,533.34	06/26/2020	HA	PAY
> 0000		HARTSDALE, NY 10530	\$3,047.39	06/04/2020	TE	PAY



You can select from multiple options:

[Add a Payment Method for Multiple Accounts \(ACH\)](#)

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

Bulk Actions									
BILLING ACCOUNT	NAME	BILLING ADDRESS	STATEMENT BALANCE	DUE BY	OWNER				
<input checked="" type="checkbox"/>	> 0000	CHARLOTTE, NC 282344357	\$0.00	08/16/2020	TE	PAY	PA	ME	...
<input checked="" type="checkbox"/>	> 0000	GENESE0, NY 14454	\$29,533.34	06/26/2020	HA	PAY	PA	ME	...
<input checked="" type="checkbox"/>	> 0000	HARTSDALE, NY 10530	\$3,047.39	06/04/2020	TE	PAY	PA	ME	...

Bulk Actions

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

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

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

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

Apply Payment Method

Add a single payment method to multiple accounts

Selected Accounts	Routing Number	Confirm Routing Number
0000	<input type="text"/>	<input type="text"/>
0000	Account Number	Confirm Account Number
	<input type="text"/>	<input type="text"/>
	Account Type	<input type="text"/>
	Name (First and Last or Company Name)	
	<input type="text"/>	
<input type="checkbox"/> Set as default payment method <input type="checkbox"/> Turn on AutoPay for all accounts		
<input type="button" value="Cancel"/> <input type="button" value="Save"/>		

Add a Payment Method for Multiple Accounts (Credit Cards – Texas Customers Only)

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**.

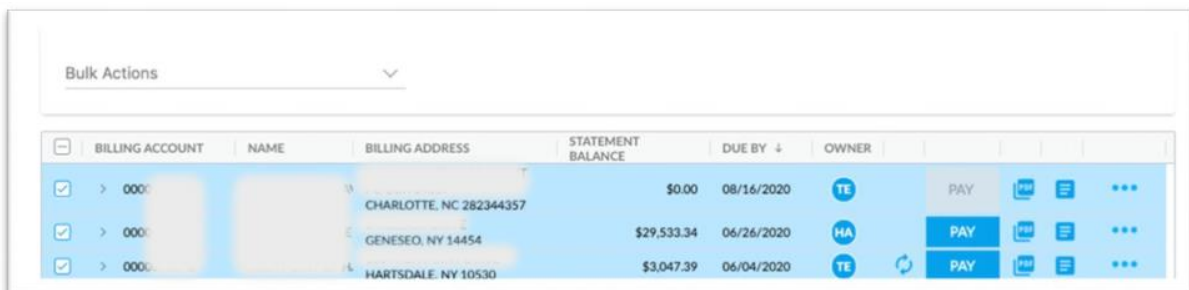
This will take you to the **Add Payment Method** screen. On the left you will see the selected accounts you will be applying the change to. *Please note that if you do not have permissions to apply payment methods to certain accounts, it will not display on the left. There will be a service fee of 4% when paying by credit card. We support Mastercard, American Express, and Discover Card.*

Next, select **Credit Card** and 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.

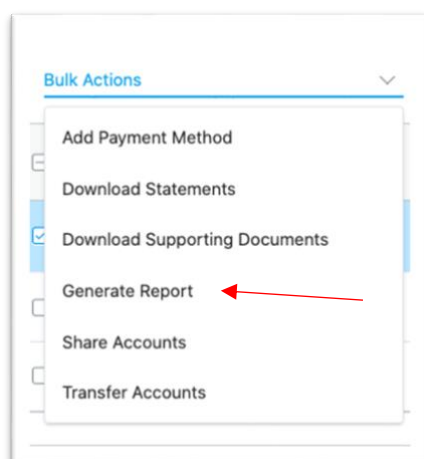
Also, if you would like to turn on AutoPay for those selected accounts, select the second box **Turn on AutoPay for all accounts**. Select **Save** to make changes and a success message will appear.

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**.



BILLING ACCOUNT	NAME	BILLING ADDRESS	STATEMENT BALANCE	DUE BY	OWNER				
<input checked="" type="checkbox"/>	> 0000	CHARLOTTE, NC 282344357	\$0.00	08/16/2020	TE	PAY	PDF	...	
<input checked="" type="checkbox"/>	> 0000	GENESE0, NY 14454	\$29,533.34	06/26/2020	HA	PAY	PDF	...	
<input checked="" type="checkbox"/>	> 0000	HARTSDALE, NY 10530	\$3,047.39	06/04/2020	TE	PAY	PDF	...	



Generate Report

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

Select Billed Dates

Choose from date: 9/11/2020

Choose to date: 9/18/2020

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

Select Report Data Fields

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

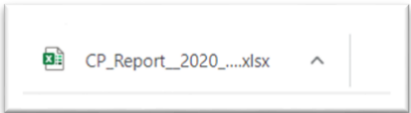
The page will display fields under two columns/sections: **Billing** and **Meter** information.

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

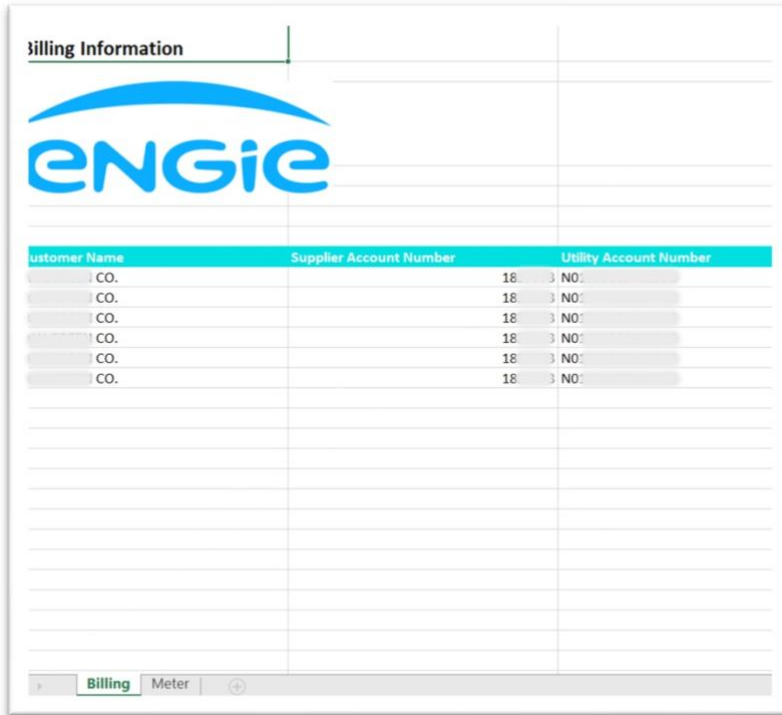
Save Preferences

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

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

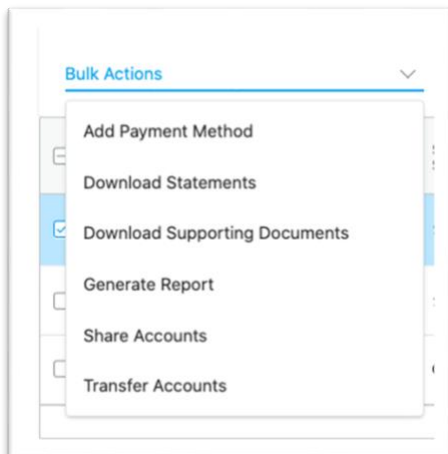
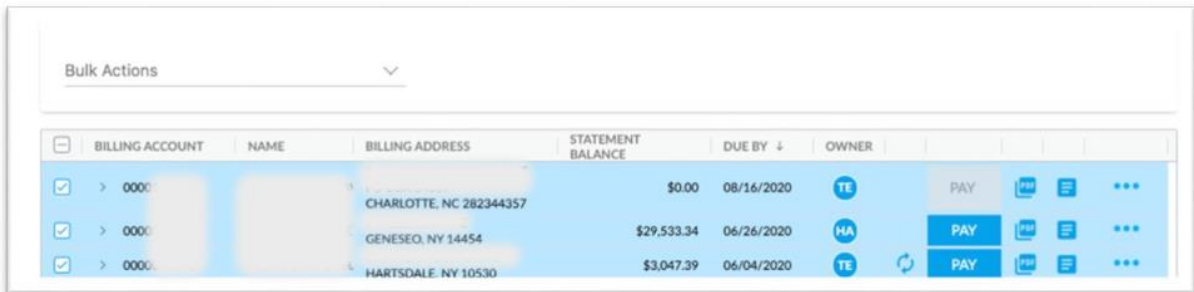


The excel file will have 2 tabs, one for **Billing Info** and one for **Meter Info**.



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.



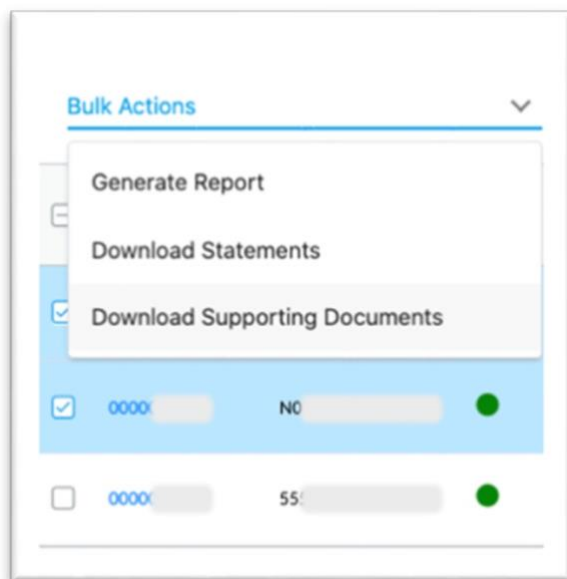
Bulk Download Supporting Documents – Download Supporting Documents for Multiple Accounts

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.

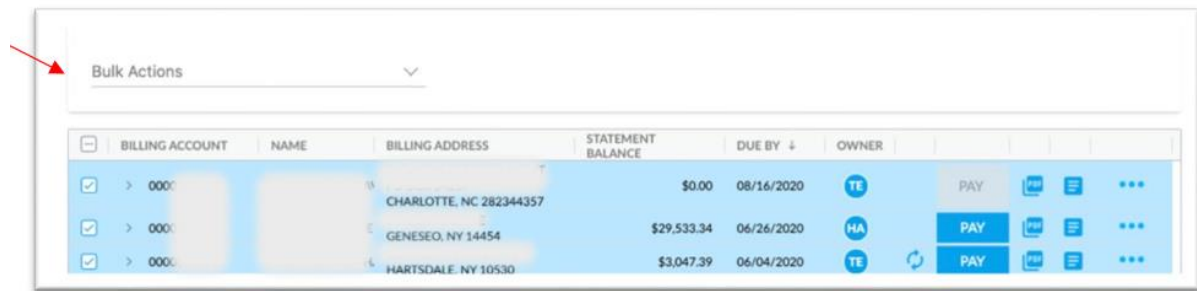


The screenshot shows a table with columns: BILLING ACCOUNT, NAME, BILLING ADDRESS, STATEMENT BALANCE, DUE BY, OWNER, and a series of action buttons. A 'Bulk Actions' dropdown menu is open, showing options: Generate Report, Download Statements, and Download Supporting Documents (which is selected with a checkmark). Below the table, there are two rows of account information with checkboxes and status indicators.

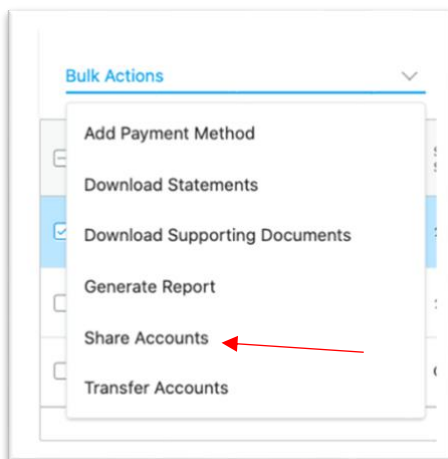
BILLING ACCOUNT	NAME	BILLING ADDRESS	STATEMENT BALANCE	DUE BY	OWNER	PAY	PDF	PRINT	...
<input checked="" type="checkbox"/> > 0000		CHARLOTTE, NC 282344357	\$0.00	08/16/2020	TE	PAY	PDF	PRINT	...
<input checked="" type="checkbox"/> > 0000		GENESEO, NY 14454	\$29,533.34	06/26/2020	HA	PAY	PDF	PRINT	...
<input checked="" type="checkbox"/> > 0000		HARTSDALE, NY 10530	\$3,047.39	06/04/2020	TE	PAY	PDF	PRINT	...



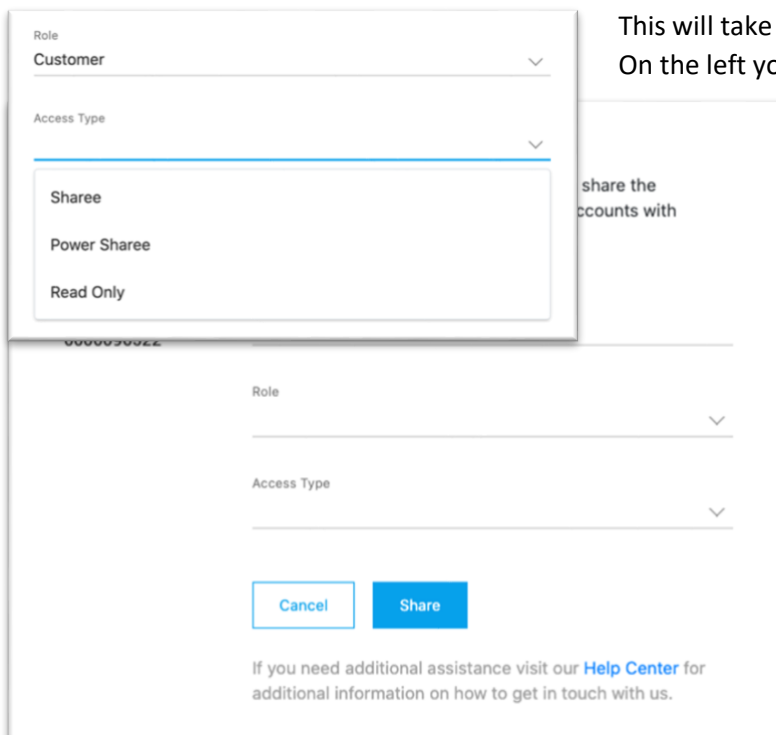
Bulk Share Accounts – Share Multiple Accounts at Once



	BILLING ACCOUNT	NAME	BILLING ADDRESS	STATEMENT BALANCE	DUE BY	OWNER	
<input checked="" type="checkbox"/>	> 0000		CHARLOTTE, NC 282344357	\$0.00	08/16/2020	TE	PAY
<input checked="" type="checkbox"/>	> 0000		GENESE0, NY 14454	\$29,533.34	06/26/2020	HA	PAY
<input checked="" type="checkbox"/>	> 0000		HARTSDALE, NY 10530	\$3,047.39	06/04/2020	TE	PAY



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



Role: Customer

Access Type: Sharee

Power Sharee

Read Only

Role: _____

Access Type: _____

Cancel Share

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

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

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

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

Select the access type you want them to receive.

- Sharee

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

- Power Sharee

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

- Read Only

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

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

Bulk Transfer Accounts – Transfer Multiple Accounts at Once

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

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

	BILLING ACCOUNT	NAME	BILLING ADDRESS	STATEMENT BALANCE	DUE BY +	OWNER			
<input checked="" type="checkbox"/>	> 0000		CHARLOTTE, NC 282344357	\$0.00	08/16/2020	TE	PAY	PDF	...
<input checked="" type="checkbox"/>	> 0000		GENESE0, NY 14454	\$29,533.34	06/26/2020	HA	PAY	PDF	...
<input checked="" type="checkbox"/>	> 0000		HARTSDALE, NY 10530	\$3,047.39	06/04/2020	TE	PAY	PDF	...

Transfer Accounts

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

Selected Accounts: 00000

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

Role: v

Access Type: v

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**.

Bulk Actions v

<input type="checkbox"/>	BILLING ACCOUNT	NAME	BILLING ADDRESS	STATEMENT BALANCE	DUE BY ↓	OWNER			
<input checked="" type="checkbox"/>	> 0000		CHARLOTTE, NC 282344357	\$0.00	08/16/2020	TE	PAY		
<input checked="" type="checkbox"/>	> 0000		GENESE0, NY 14454	\$29,533.34	06/26/2020	HA	PAY		
<input checked="" type="checkbox"/>	> 0000		HARTSDALE, NY 10530	\$3,047.39	06/04/2020	TE	PAY		

Actions v

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

Release Accounts

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

Selected Accounts

00000

00000

00000

00000

Cancel

Release

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