



MY ENGIE PORTAL GUIDE

For Customers

Updated Dec 6, 2024

Contents

Overview	5
Activating Account.....	5
Didn't receive an activation email?	7
Guest Payment (Pay without signing in).....	8
Guest Payment (ACH)	9
Guest Payment (Credit Cards – Texas Customers Only).....	10
Logging In.....	13
Profile & Preferences	15
Add/Edit Contact Info: Name, Company, Billing Address, Phone Number	15
Changing Email Address.....	17
Changing Password	18
Set up Communication Preferences/Email Notifications	19
E-bill statement is ready	19
Dashboard Landing Page	20
View Account History.....	20
Cancel a Pending Payment	21
View Your Account(s) (3 Scenarios)	23
View Your Account(s) - Scenario 1: Account List View	24
Add/Delete a Payment Method.....	25
Add Payment Method (ACH)	26
Add Payment Method (Credit Card – Texas Customers Only)	26
Delete Payment Method	29
Default Payment Method	29
Make a Payment (ACH and Credit Cards)	30
Payment Amount	31
Payment Date	31
Payment Method	31
Update Billing Address.....	32
View Account History.....	33
Cancel a Pending Payment	34
Share Account(s)	35
Transfer Account(s).....	37
Release Account(s).....	38

Generate Report	39
Enroll in AutoPay	41
Un-Enroll in AutoPay.....	42
Bulk Actions	43
Add a Payment Method for Multiple Accounts (ACH)	43
Add a Payment Method for Multiple Accounts (Credit Cards – Texas Customers Only)	45
Bulk Update Billing Address – Update Billing Address for Multiple Accounts	45
Bulk Generate Report – Generate a Report for Multiple Accounts	46
Bulk Download Statements – Download Statements (bills) for Multiple Accounts	48
Bulk Download Supporting Documents – Download Supporting Documents for Multiple Accounts	48
Bulk Share Accounts – Share Multiple Accounts at Once	49
Bulk Transfer Accounts – Transfer Multiple Accounts at Once	50
Bulk Release Accounts – Remove Multiple Accounts at Once	51
View Your Account(s) - Scenario 2: Account Detail View	52
Account Information.....	54
Total Amount Due.....	54
View Bill/Statement.....	54
Account Info Tile	55
Contact Tile	55
Account Settings Tile	56
Costs & Usage	56
Bill Cycle Tab - Cost.....	56
Bill Cycle Tab - Usage	57
Year Tab - Usage	58
Add/Delete a Payment Method: Scenario 1.....	59
Add Payment Method (ACH)	60
Add Payment Method (Credit Card – Texas Customers Only)	60
Delete Payment Method	62
Default Payment Method	62
Add/Delete a Payment Method: Scenario 2.....	63
Add Payment Method (ACH)	64
Add Payment Method (Credit Card – Texas Customers Only)	64
Delete Payment Method	66
Default Payment Method	66
Make a Payment (ACH and Credit Cards)	67

Payment Amount	68
Payment Date	69
Payment Method	69
Update Billing Address	71
View Account History	72
Cancel a Pending Payment	73
Enroll in AutoPay	74
Un-Enroll in AutoPay	75
Enroll in Paperless Billing (Sign up to get emailed bill copies)	76
Un-Enroll in Paperless Billing	77
Share Account(s)	78
Transfer Account(s)	79
Release Account(s)	81
Generating a Report	82
View Your Account(s) - Scenario 3: Account Summary/Summary Bill	84
Add/Delete a Payment Method: Scenario 1	84
Add Payment Method (ACH)	85
Add Payment Method (Credit Card – Texas Customers Only)	86
Delete Payment Method	88
Default Payment Method	88
Add/Delete a Payment Method: Scenario 2	90
Add Payment Method (ACH)	90
Add Payment Method (Credit Card – Texas Customers Only)	91
Delete Payment Method	93
Default Payment Method	93
Make a Payment (ACH and Credit Cards)	95
Payment Amount	96
Payment Date	96
Payment Method	96
Update Billing Address for one or Multiple Accounts	97
View Account History	99
Cancel a Pending Payment	100
Share Account(s)	100
Transfer Account(s)	101
Release Account(s)	103
Generate Report	104

Enroll in AutoPay	105
Un-Enroll in AutoPay.....	107
Bulk Actions	108
Add a Payment Method for Multiple Accounts (ACH)	108
Add a Payment Method for Multiple Accounts (Credit Cards – Texas Customers Only)	110
Bulk Generate Report – Generate a Report for Multiple Accounts	110
Bulk Download Statements – Download Statements (bills) for Multiple Accounts.....	112
Bulk Download Supporting Documents – Download Supporting Documents for Multiple Accounts	113
Bulk Share Accounts – Share Multiple Accounts at Once	114
Bulk Transfer Accounts – Transfer Multiple Accounts at Once.....	115
Bulk Release Accounts – Remove Multiple Accounts at Once	116

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.

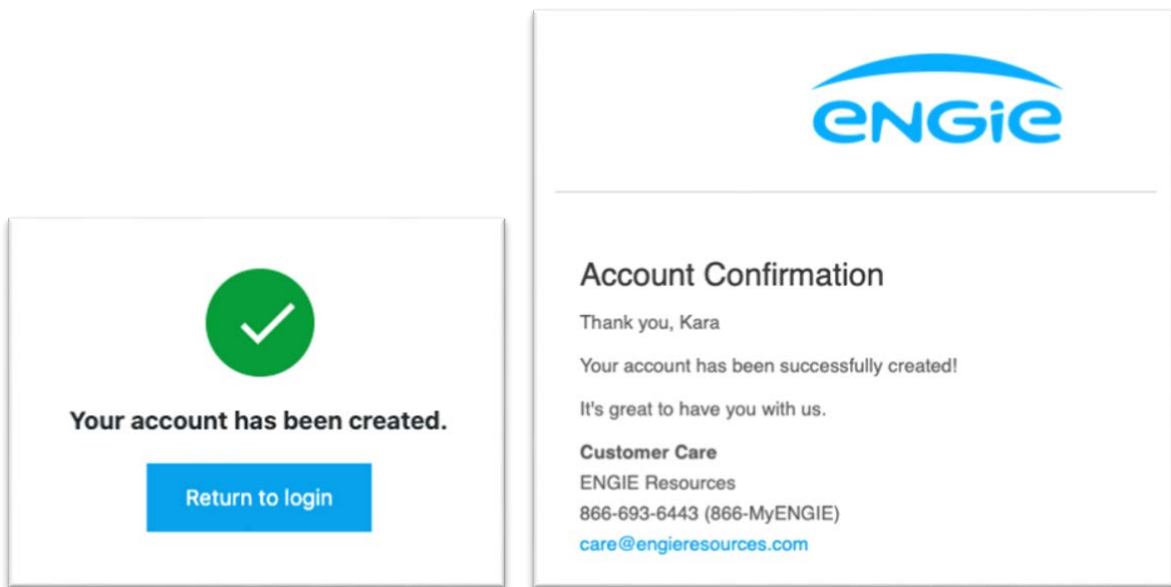
Confirm Password



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**.

The image shows a "Sign in" form. At the top, it says "Sign in" and "First time here? If you haven't activated your new account or never received an activation email [click here to resend activation email](#)". Below this are two input fields: "Email Address" and "Password". A blue "Sign in" button is at the bottom. A red arrow points to the "click here to resend activation email" link. At the very bottom, it says "Just need to make a payment? [Continue without signing in](#)".

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

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

Resend activation email

 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**.

Pay without signing in

Enter Billing Account or Utility Account and Zip Code

Billing Account Number

Utility Account Number

Zip Code

Confirm

Want to manage your account instead? [Sign in](#)

Pay without signing in

Enter Billing Account or Utility Account and Zip Code

Billing Account Number

For your reference, this is your new Billing Account Number

Utility Account Number

Service Address Zip Code

75050

Continue to Payment

Reset

Want to manage your account instead? [Sign in](#)

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.

ENGIE Resources LLC

Payment Method

Card eCheck

9-digit Routing # Checking

Account Number Re-enter account number

Billing Information United States of America

Company Name

First and last name

Postal code

* required (only one name field is required)

Next

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

echeck

TESTER

Account Ending -

RTN #

Amount Summary

☒ Current Charges (\$47.16)

☐ Statement Balance (\$47.16)

☐ Current Balance (\$47.16)

Next

ENGIE Resources LLC

Payment Information

Edit

echeck

TESTER

Account Ending

RTN #

Amount Summary

Amount: \$47.16

Edit

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 CW

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

© 2021 CSG Forte Payments, Inc. Security Privacy TOS


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

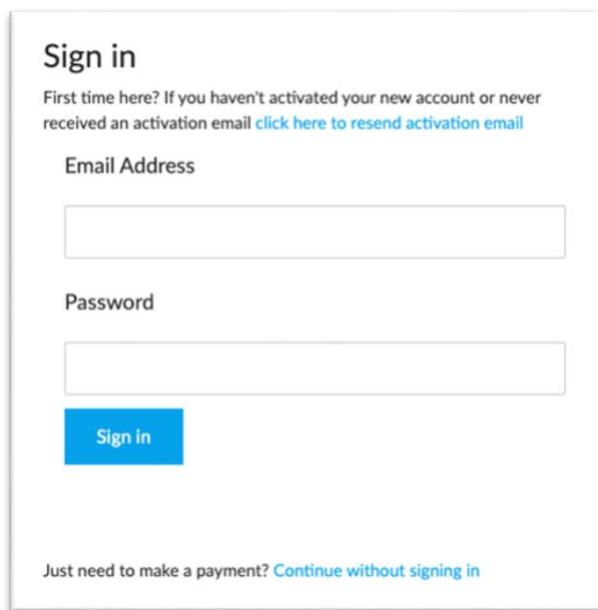
Confirmation Number:

6CZ227

Dismiss

Logging In

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

A sign-in form with a white background and a thin grey border. At the top, the text "Sign in" is in bold. Below it, a line of text says "First time here? If you haven't activated your new account or never received an activation email" followed by a blue link "click here to resend activation email". There are two input fields: "Email Address" and "Password", each with a white box and a grey border. Below the password field is a blue "Sign in" button. At the bottom, a line of text says "Just need to make a payment?" followed by a blue link "Continue without signing in".

Sign in

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

Email Address

Password

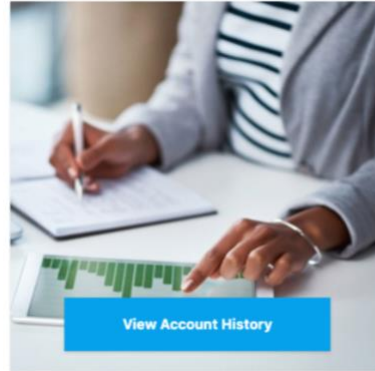
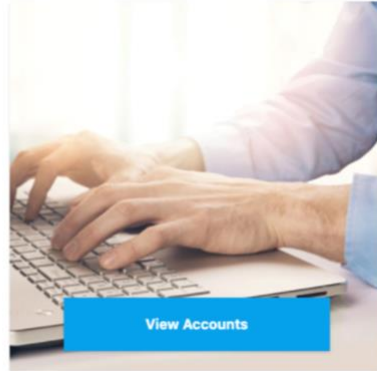
Sign in

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

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

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.



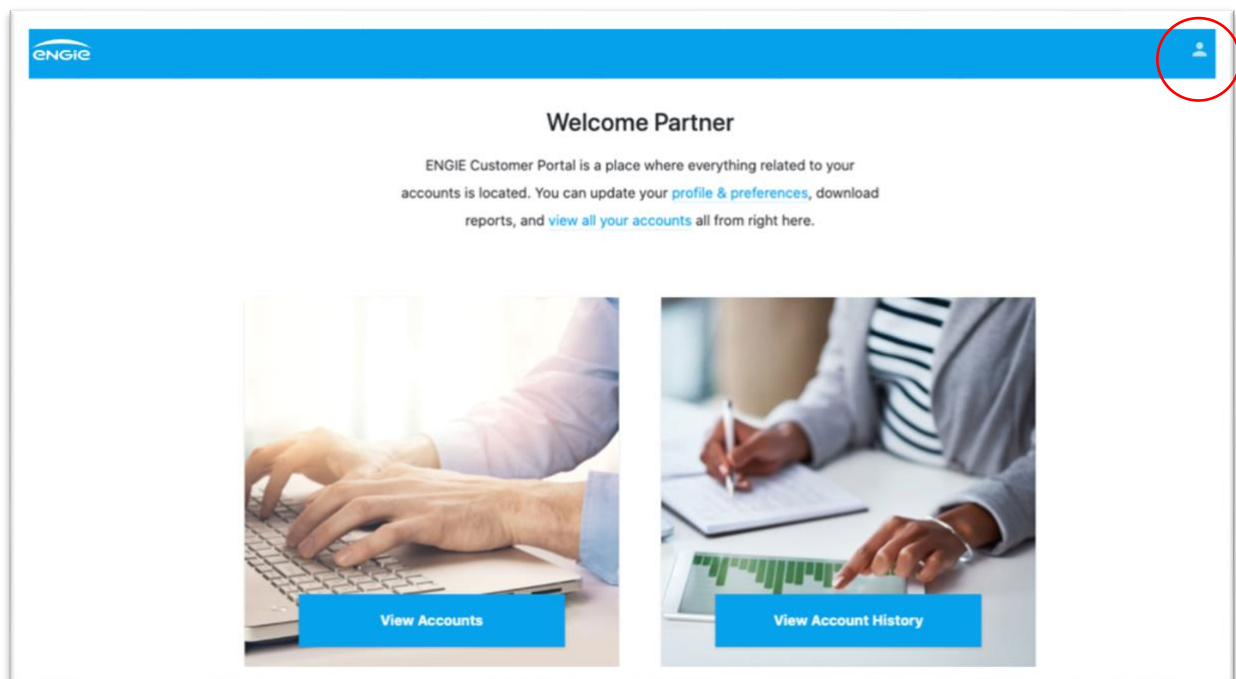
Profile & Preferences

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**.

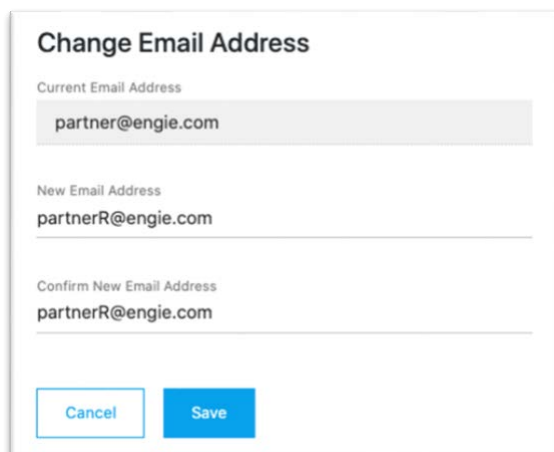


Sign in and Security

Email Address
partner@engie.com

[Change Email Address](#)

[Change Password](#)



Change Email Address

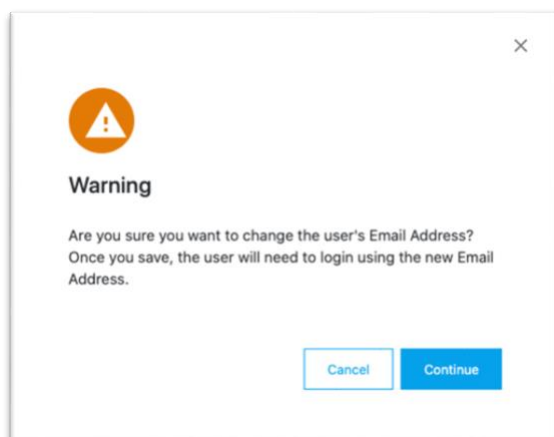
Current Email Address
partner@engie.com

New Email Address
partnerR@engie.com

Confirm New Email Address
partnerR@engie.com

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

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

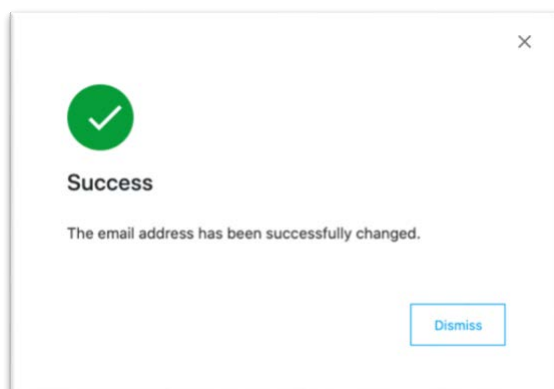


Warning

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

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

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



Success

The email address has been successfully changed.

[Dismiss](#)

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

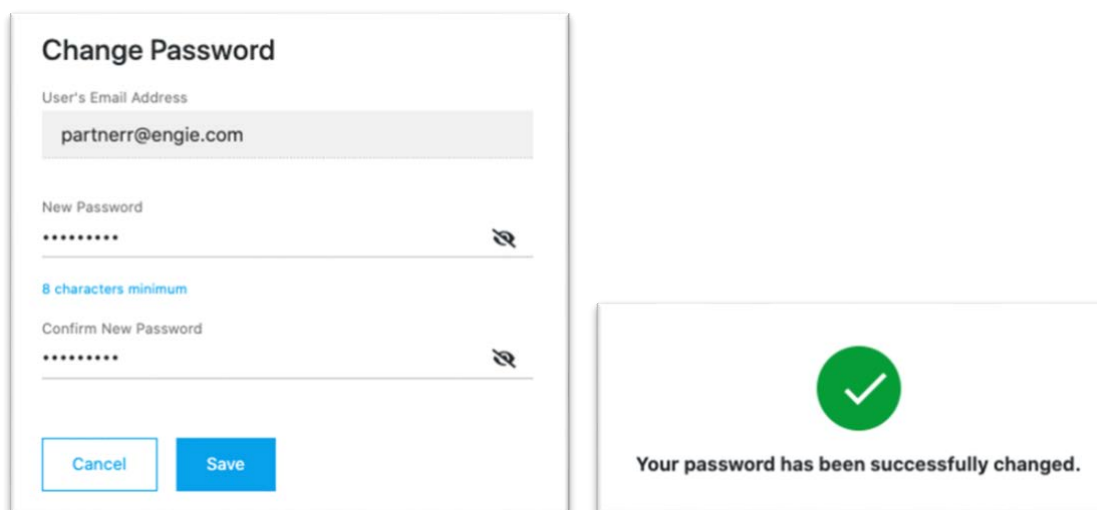
Changing Password

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



The image shows a 'Sign in and Security' panel. It contains an 'Email Address' field with the text 'partner@engie.com'. To the right of the field are two links: 'Change Email Address' and 'Change Password'. A red arrow points to the 'Change Password' link.

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.



The image shows two components. On the left is the 'Change Password' form, which includes a 'User's Email Address' field (disabled) with 'partnerr@engie.com', a 'New Password' field (masked with dots), a 'Confirm New Password' field (masked with dots), and a note '8 characters minimum'. At the bottom are 'Cancel' and 'Save' buttons. On the right is a confirmation pop-up with a green checkmark icon and the text 'Your password has been successfully changed.'

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

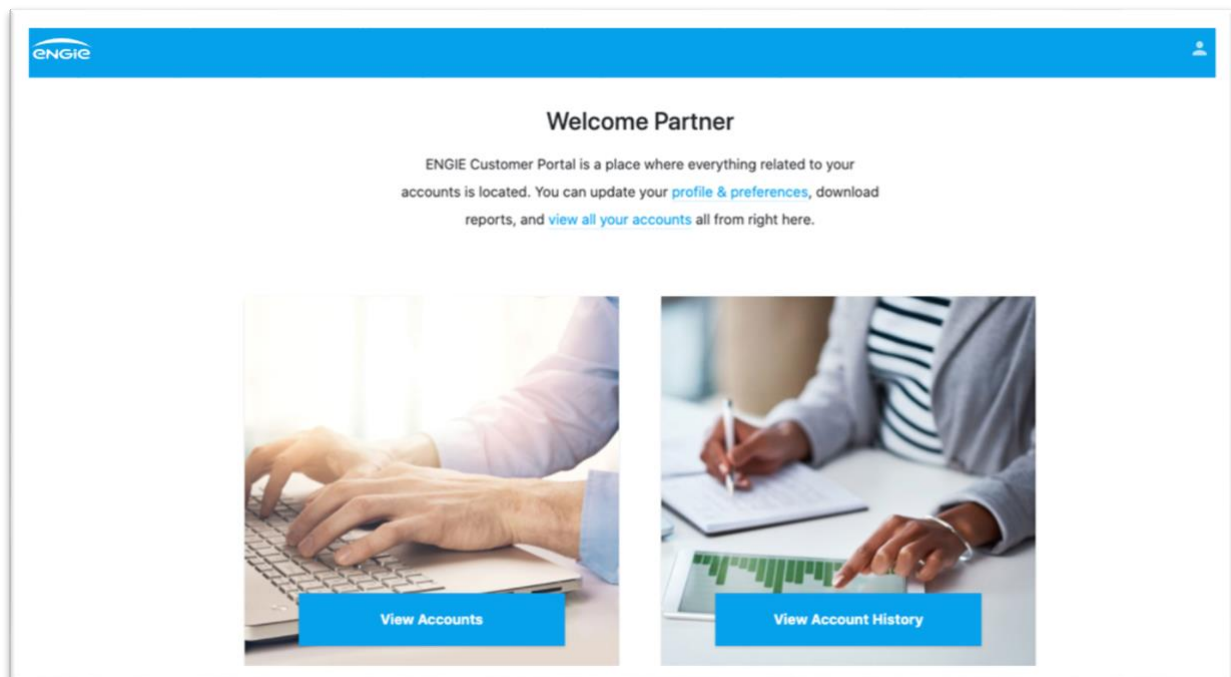


The user profile has been successfully updated.

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

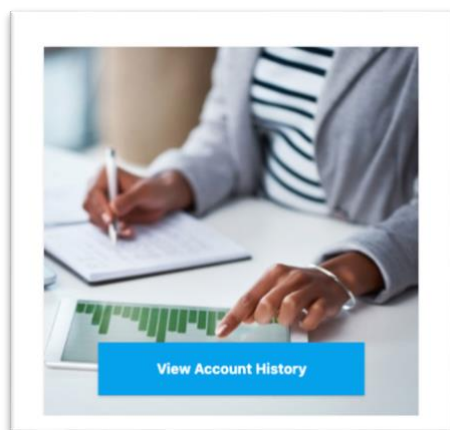
Dashboard Landing Page

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 Date6/20/2020To Date9/18/2020

Search

Filter by type, status...

	STATUS	PAYMENT AMOUNT	TRANSACTION DATE	STATEMENT PERIOD	USAGE	CURRENT CHARGES	STATEMENT BALANCE
0000							
0000							
0000							

0 to 0 of 0Page 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
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.


From Date

6/20/2020




To Date

9/18/2020



Search

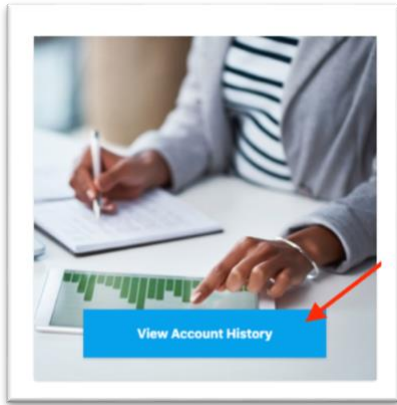
can



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

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

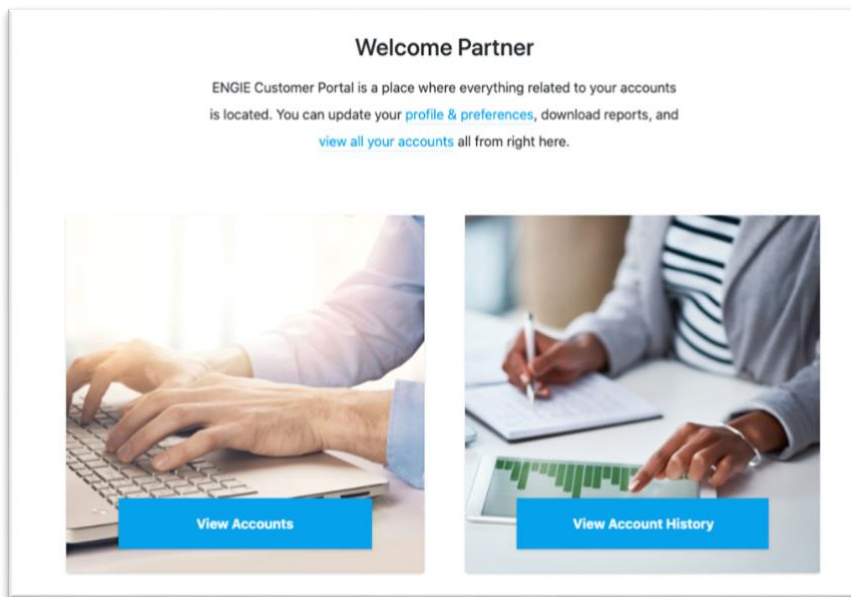
×

Cancel Scheduled Payment

Are you sure you want to cancel this payment?

Don't Cancel
Cancel Payment

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.

	BILLING ACCOUNT	UTILITY ACCOUNT	STATUS	SERVICE START	SERVICE ADDRESS	UTILITY	OWNER	STATEMENT BALANCE	DUE BY	
<input type="checkbox"/>	00000	N01900		11/01/2019	GRANVILLE, NY 12031	NYSEG	19	\$1,250.00	07/17/2020	PAY PDF S ***
<input type="checkbox"/>	00000	N01900		11/01/2015	CLARENCE, NY 14031	NYSEG	06	\$3,333.69	07/17/2020	PAY PDF S ***
<input type="checkbox"/>	00000	S118571		05/01/2015	HARTSDALE, NY 10524	COMED	19	\$3,047.29	06/04/2020	PAY PDF S ***

1 to 3 of 3 Page 1 of 1

Rows per page: 19 [Export to Excel](#)

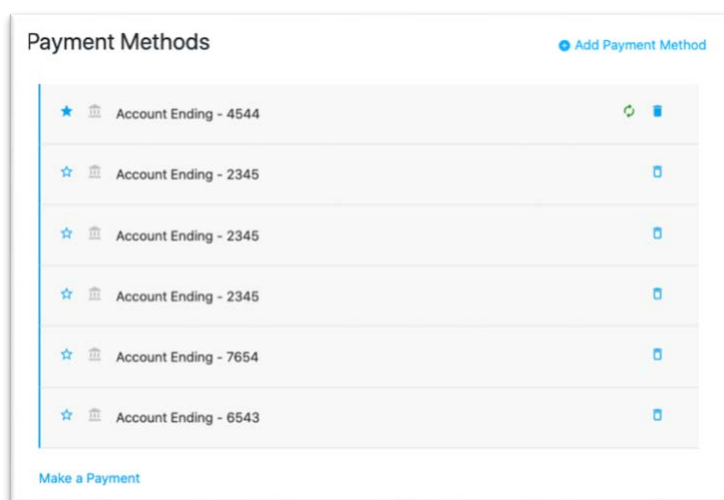
Add/Delete a Payment Method

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



The screenshot shows a table with columns: BILLING ACCOUNT, UTILITY ACCOUNT, STATUS, SERVICE START, SERVICE ADDRESS, UTILITY, OWNER, STATEMENT BALANCE, and DUE BY. There are three rows of data. A dropdown menu is open for the first row, showing options: View History, Generate Report, Unenroll in AutoPay, and Add Payment Method. A red arrow points to the 'Add Payment Method' option.

BILLING ACCOUNT	UTILITY ACCOUNT	STATUS	SERVICE START	SERVICE ADDRESS	UTILITY	OWNER	STATEMENT BALANCE	DUE BY
<input type="checkbox"/> 0001	H050000	●	12/01/2019	GRANVILLE, NY 12850	NYSEG	TE	\$3,250.02	07/17/2020
<input type="checkbox"/> 0002	H050000	●	12/01/2019	CLARENCE, NY 14001	NYSEG	PN	\$1,333.49	07/17/2020
<input type="checkbox"/> 0003	1518571	●	05/01/2019	HARTSDALE, NY 1053	CONED	TE	\$3,047.39	06/04/2020



The screenshot shows the 'Payment Methods' page. It has a title 'Payment Methods' and a link 'Add Payment Method'. Below is a list of payment methods, each with a star icon, a bank icon, and a text description. At the bottom is a link 'Make a Payment'.

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

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)

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

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

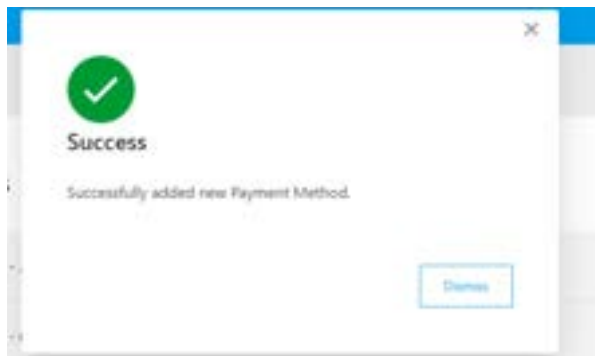
XXXXXXXXXXXX0005 02 2025

Billing Information United States of America

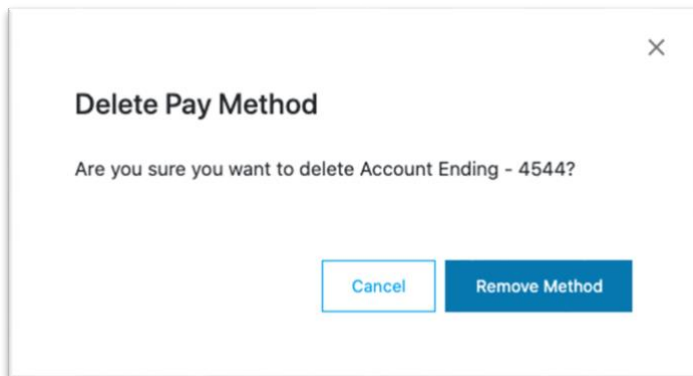
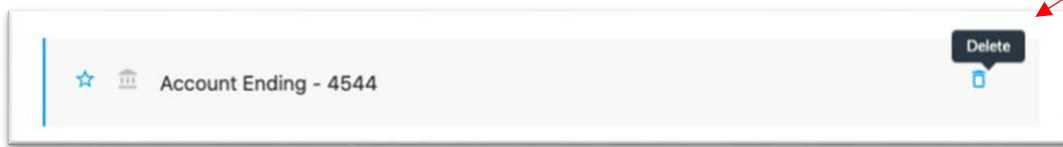
Cupcakes R Us
Betty Crocker
77059

Save

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



Delete Payment Method



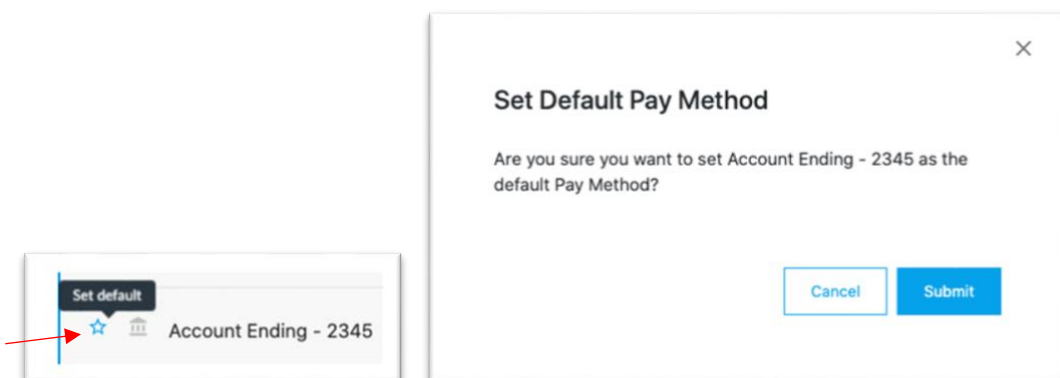
If you no longer need a payment method, you can remove it from the list. Click on the trash can icon to the right of the payment method to delete it. A pop up will appear asking you to confirm you want to delete the payment method. Click **Remove Method** to continue. The payment method will then be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



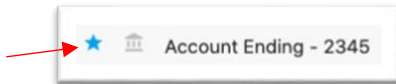
Please note that a payment **cannot** be deleted if it is the payment method that is enrolled in AutoPay. AutoPay is always tied to the default payment method. If you do want to delete a payment method that is associated with AutoPay, change the default payment method and it will tie AutoPay with that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

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!

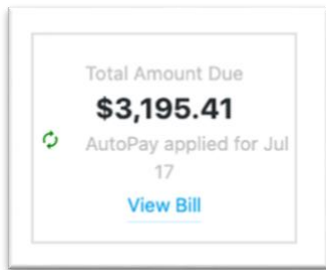
Payment Amount

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

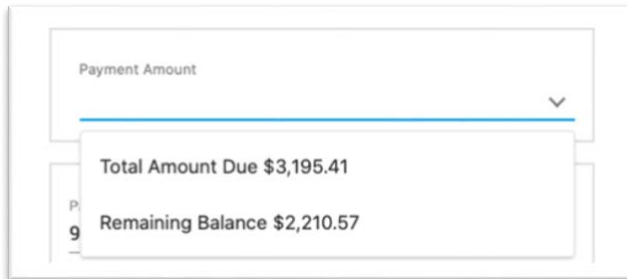


The top section will show your total amount due and if it is enrolled in AutoPay, a message will appear here to indicate that. You can still proceed even though you are enrolled in AutoPay if you want to make a one-time payment.

[View Bill](#)

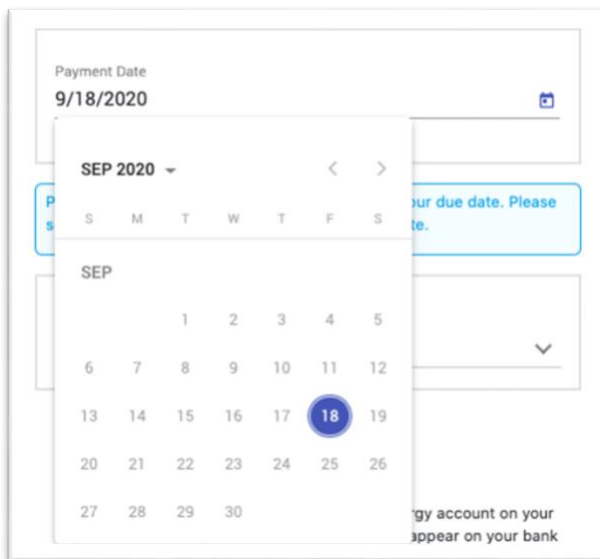
You can also view your bill you are paying on here. This will open up a PDF of the statement.

Payment Amount



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

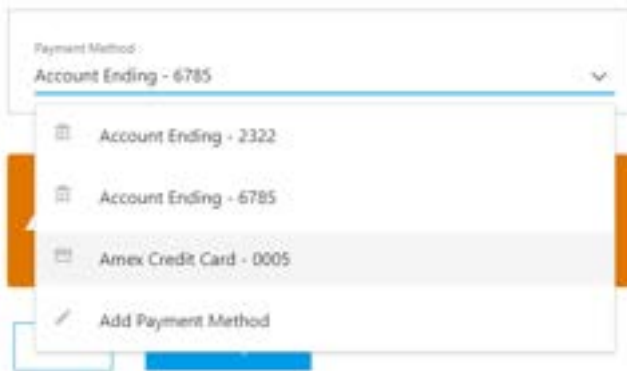
Payment Date



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

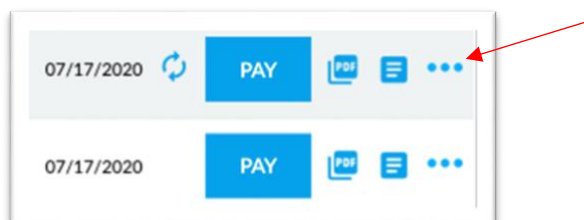
A service fee of 4% will be charged on all credit card payments (\$2.00 minimum)

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	NE000000		12/01/2019	GRANVILLE, NY 12032	NYSEG	19	\$1,250.00	07/17/2020		<div><div>PAY</div><div> </div></div>
<input type="checkbox"/>	0000	NE000000		12/01/2015	BUFFALO, NY 14223	NYSEG	19	\$1,029.15	07/17/2020		<div><div>PAY</div><div> </div></div>
<input type="checkbox"/>	0000	55581710		05/01/2015	HARTSDALE, NY 10539	CONED	19	\$1,047.39	06/04/2020		<div><div>PAY</div><div> </div></div>
<input type="checkbox"/>	0000	47232900		09/01/2012	FAIRMOUNT, IL 61842	AHEREN		\$18,823.12	05/26/2020		<div><div>PAY</div><div> </div></div>

Add Payment Method

Update Billing Address

Enroll in AutoPay

View History

Generate Report

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

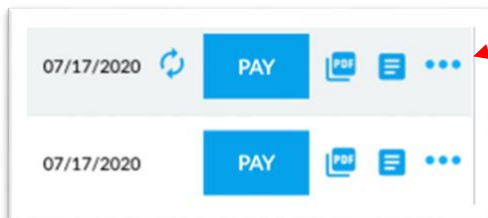
Postal Code

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	NE500000	●	12/01/2019	GRAINVILLE, NY 12832	NYSEG	TS	\$3,250.02	07/17/2020	<div> <div></div> <div>View History</div> <div>Generate Report</div> <div>Unenroll in AutoPay</div> <div>Add Payment Method</div> </div>
<input type="checkbox"/>	0000	NE500000	●	12/01/2015	CLARENCE, NY 14031	NYSEG	PH	\$3,333.69	07/17/2020	
<input type="checkbox"/>	0000	19585714	●	05/01/2015	HARTSDALE, NY 10523	CONED	TS	\$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	From Date	To Date	Search		Filter by date range				
00000	6/20/2020	9/18/2020							
<input type="checkbox"/>	BILLING ACCOUNT	TYPE	STATUS	PAYMENT AMOUNT	TRANSACTION DATE	STATEMENT PERIOD	USAGE	CURRENT CHARGES	STATEMENT BALANCE
	00000	eCheck	Pending	(\$3,395.41)	09/04/2020				
	00000	eCheck	Pending	(\$1,400.23)	09/03/2020				
	00000	eCheck	Pending	(\$3,395.41)	09/03/2020				
	00000	eCheck	Pending	(\$3,395.41)	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	From Date	To Date	Search		can				
00000	6/20/2020	9/18/2020							
<input type="checkbox"/>	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				
1 to 8 of 8 Page 1 of 1									

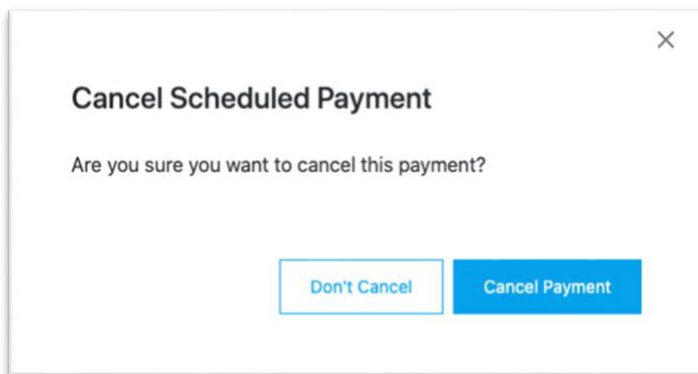
Cancel a Pending Payment

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
Information: 9/18/2020	09/18/2020	09/18/2020	09/18/2020	09/18/2020	09/18/2020

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



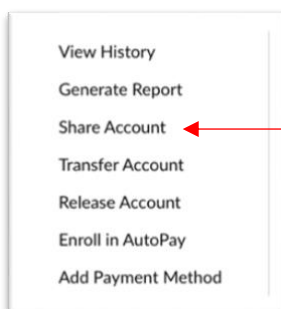
Share Account(s)

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
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.*

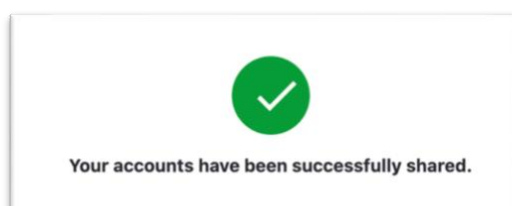
Role
Partner ▼

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.



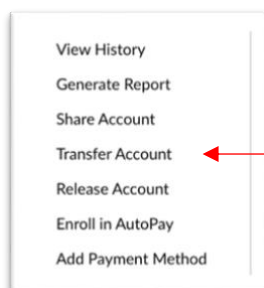
Transfer Account(s)

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

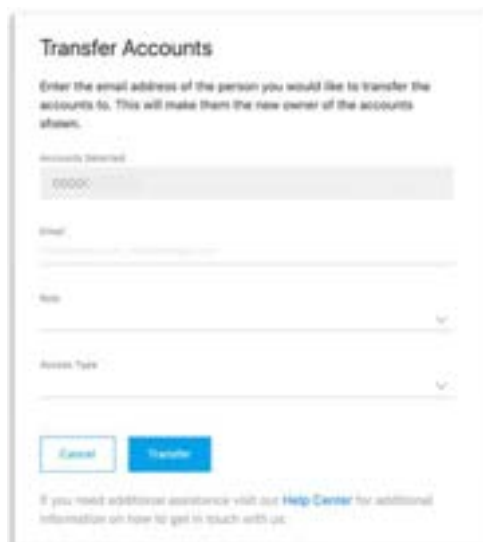
From the account list view, click on the three blue horizontal dots on the right of the account to display additional options.



<input type="checkbox"/>	BILLING ACCOUNT	UTILITY ACCOUNT	STATUS	SERVICE START	SERVICE ADDRESS	UTILITY	OWNER	STATEMENT BALANCE	DUE BY	
<input type="checkbox"/>	00000	\$225	●	02/01/2020	PELHAM MANOR, NY	CONED	TE	\$306.84	05/29/2020	<div>PayMore***</div>



- 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.

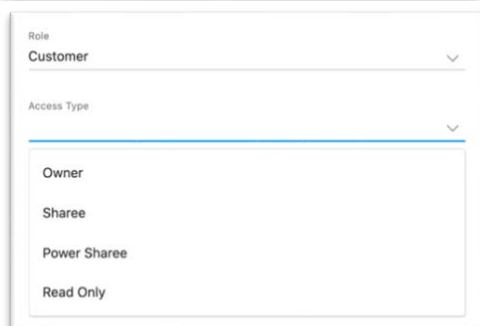
Accounts Selected
00000

Email
[text input]

Role
[dropdown menu]

Access Type
[dropdown menu]

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	\$225	●	02/01/2020	PELHAM MANOR, NY	CONED	TE	\$206.64	05/29/2020	<div> <div>PAY</div> <div>Additional Options</div> </div>

- 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

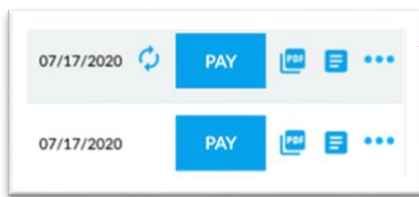
Cancel

Release

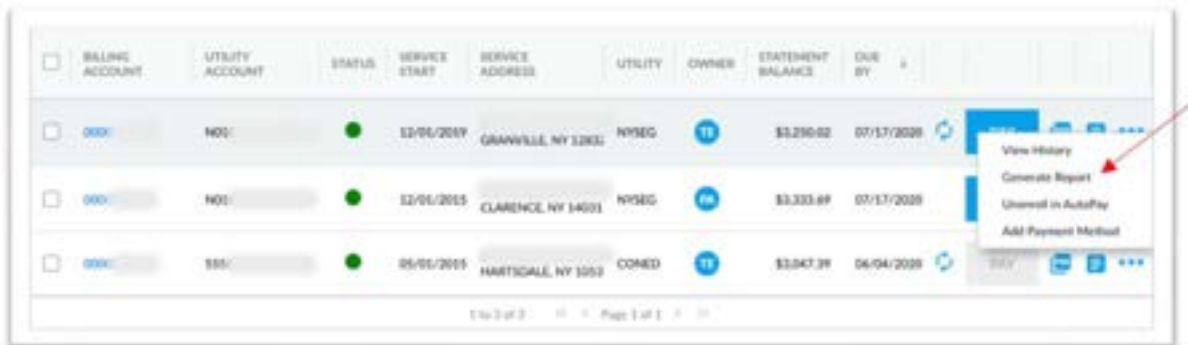
If you need additional assistance visit our [Help Center](#) for additional information on how to get in touch with us.

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 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.

☒ Save Preferences

Cancel

Generate 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
<div> <div>Billing</div> <div>Meter</div> </div>		

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	N01	●	12/01/2019	GRANVILLE, NY 12832	NYSEG	TS	\$3,290.02	07/17/2020	⋮
<input type="checkbox"/>	00000	N01	●	12/01/2019	CLARENCE, NY 14031	NYSEG	RA	\$3,333.69	07/17/2020	⋮
<input type="checkbox"/>	00000	S55	●	06/01/2019	HARTSDALE, NY 10523	CONED	15	\$3,047.39	06/04/2020	⋮

View History

Generate Report

Enroll in AutoPay

Add Payment Method

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

AutoPay & Paperless Billing

Account number: 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.

×

Enable AutoPay

Authorization Agreement for Prearranged Payments:

I hereby authorize my financial institution to charge the above account in the amount of my monthly ENGIE Resources bill and send that amount to ENGIE Resources.

I agree that each charge to my account shall be the same as if I had signed a check to pay my bill. This authority will remain in effect until I notify ENGIE Resources otherwise. If I change the account or financial institution specified, I will provide written authorization for the new financial institution to ENGIE Resources. I understand both the financial institution and ENGIE

☐ I Accept

Cancel

Agree

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

AutoPay & Paperless Billing

Account number: 00000

AutoPay

Status

Active

Payment method

Account Ending - 2345

Change payment method

Un-Enroll in AutoPay

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



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

Click Un-Enroll in AutoPay.

/2020

PAY

PDF

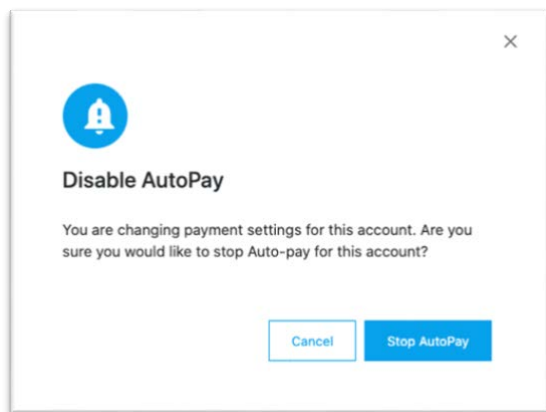
View History

Generate Report

Unenroll in AutoPay

Add Payment Method

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

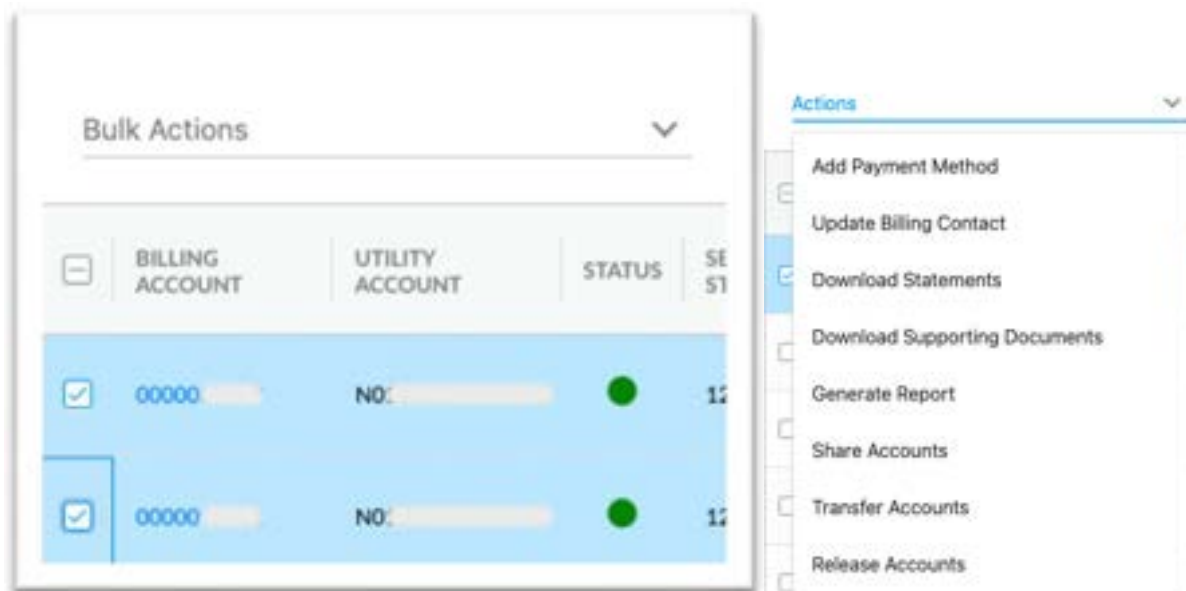


The toggle is now off and the AutoPay is off.



Bulk Actions

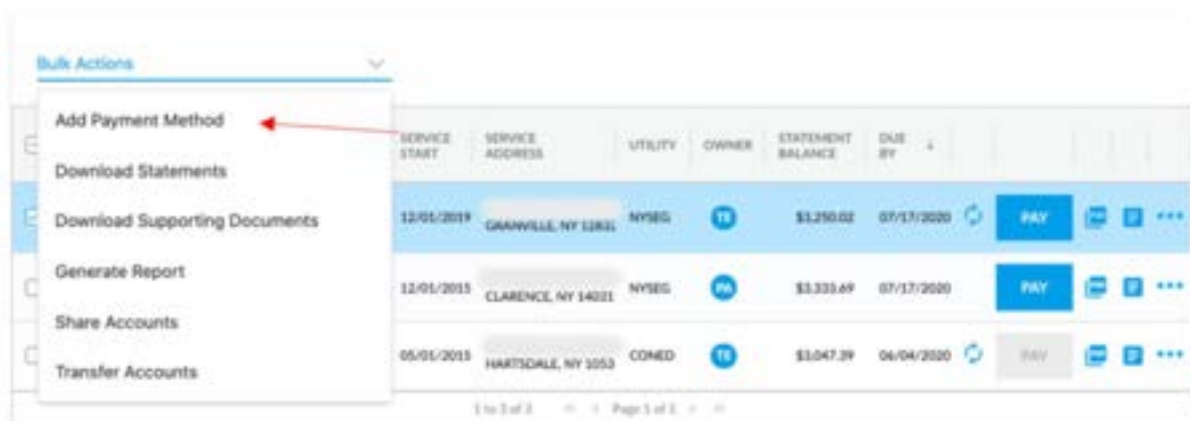
On the account list view, to the left of your accounts you will see a checkbox. Click on one or more checkboxes and a dropdown named **Actions** will appear.



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

3 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 8330903620 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

Account Number

Account Type

Confirm Routing Number

Confirm Account Number

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**.

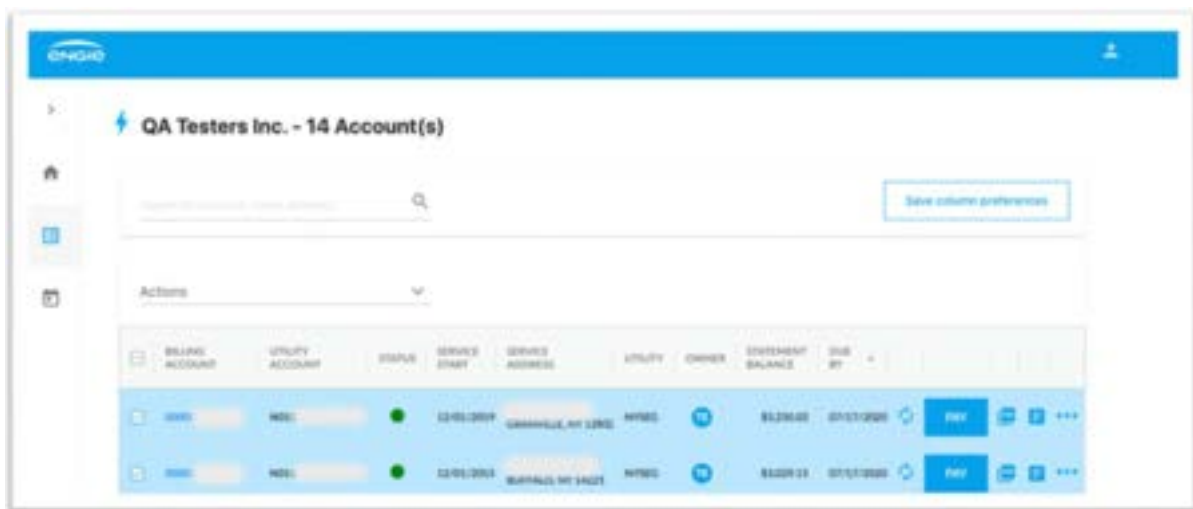
This will take you to the **Add Payment Method** screen. On the left you will see the selected accounts you will be applying the change to. *Please note that if you do not have permissions to apply payment methods to certain accounts, it will not display on the left. There will be a service fee of 4% 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.

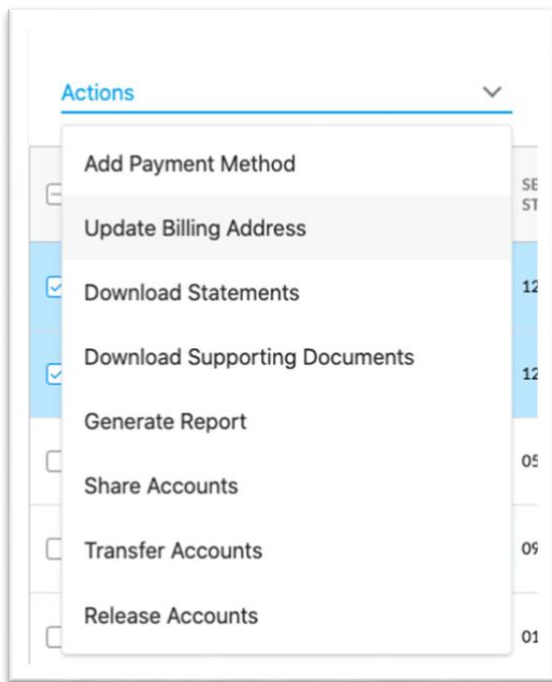
Also, If you would like to turn on AutoPay for those selected accounts, select the second box **Turn on AutoPay for all accounts**. Select **Save** to make changes and a success message will appear.

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.



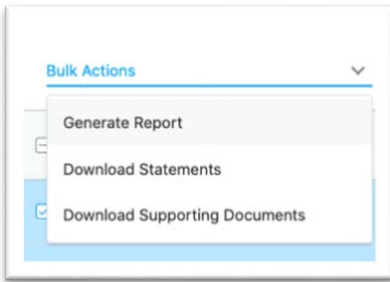
A dropdown named **Actions** will appear. Click **Update Billing Address**.



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

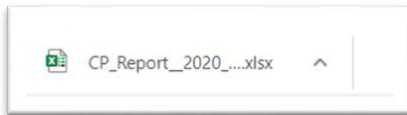
The page will display fields under two columns/sections: **Billing** and **Meter** information.

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**.

The screenshot shows the 'Billing Information' tab of an Excel spreadsheet. It features the ENGIE logo at the top. Below the logo is a table with three columns: 'Customer Name', 'Supplier Account Number', and 'Utility Account Number'. The table contains several rows of data, with some cells highlighted in blue. At the bottom of the spreadsheet, there are tabs labeled 'Billing' and 'Meter'.

Customer Name	Supplier Account Number	Utility Account Number
CSL	11	1 NO
CSL	11	1 NO
CSL	11	1 NO
CSL	11	1 NO
CSL	11	1 NO
CSL	11	1 NO
CSL	11	1 NO



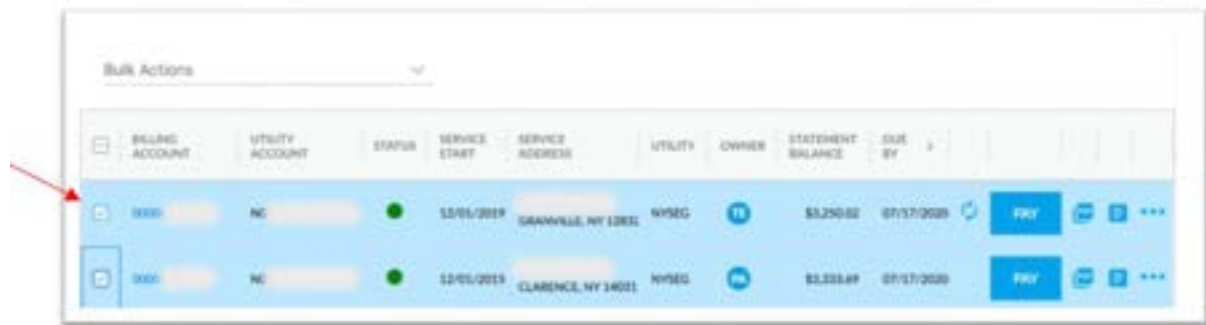
Bulk Download Statements – Download Statements (bills) for Multiple Accounts

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.

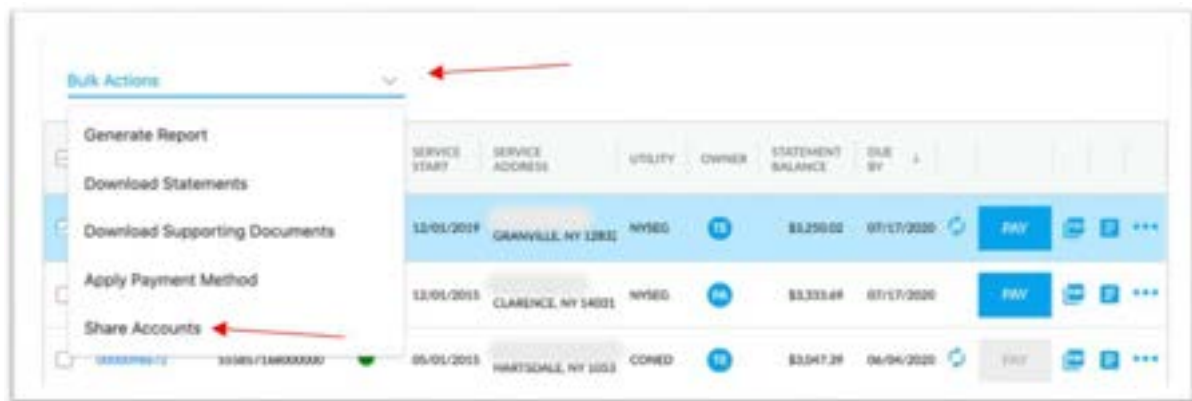
Bulk Download Supporting Documents – Download Supporting Documents for Multiple Accounts

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):

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.

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.

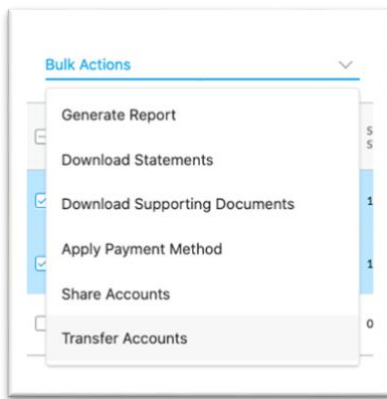
Bulk Transfer Accounts – Transfer Multiple Accounts at Once

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 type="checkbox"/>	0000	NO	●	12/01/2019	GRANVILLE, NY 12821	NYSEG	TS	\$1,250.00	07/17/2020	PAY
<input type="checkbox"/>	0000	NO	●	12/01/2019	CLARENCE, NY 14031	NYSEG	MS	\$1,333.89	07/17/2020	PAY



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.

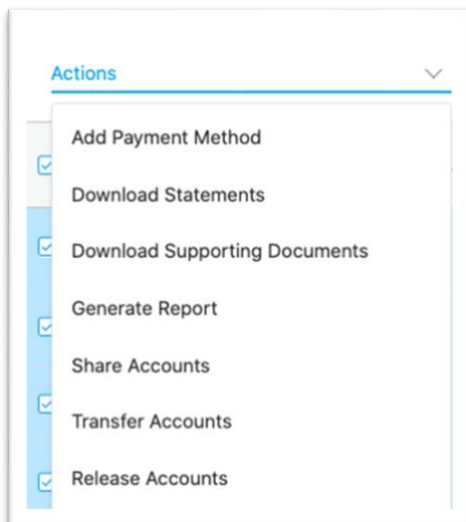
Fill out the email addresses in which you would like to transfer the selected accounts to. Make sure you separate the email addresses with a comma.

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

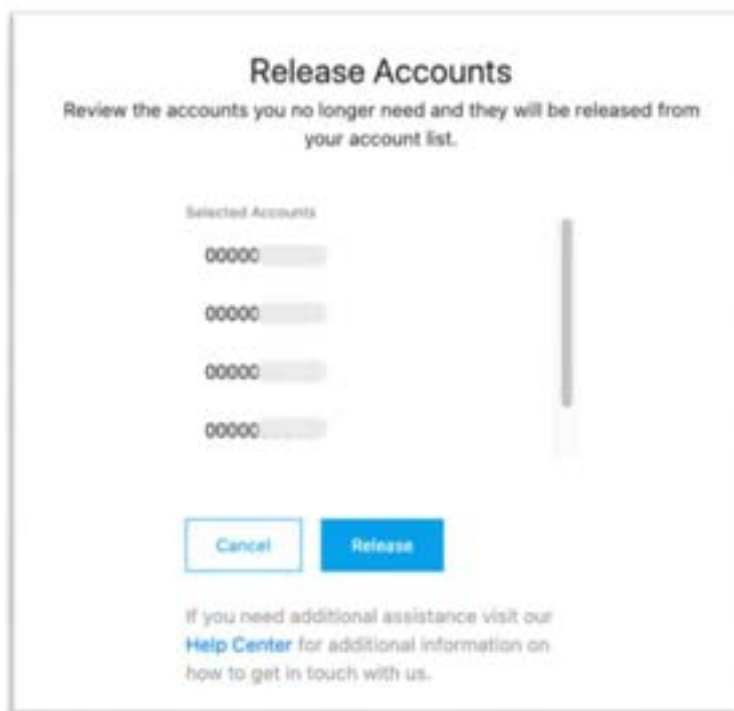
Bulk Release Accounts – Remove Multiple Accounts at Once

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**.

	BILLING ACCOUNT	UTILITY ACCOUNT	STATUS	SERVICE START	SERVICE ADDRESS	UTILITY	OWNER	STATEMENT BALANCE	DUE BY	
<input checked="" type="checkbox"/>	0000	NO	●	12/01/2019	GRANVILLE, NY 12831	NYSEG	19	\$3,256.02	07/17/2020	PAY
<input checked="" type="checkbox"/>	0000	NO	●	12/01/2019	CLARENCE, NY 14031	NYSEG	19	\$3,333.89	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.

CHORD

ENGIE - 00000

Total Amount Due

Your most recent payment of \$2,540.12 on September 8, 2020 is pending.

Remaining Balance	\$2,540.13
Current Charges	\$793.56
Statement Balance	\$3,333.69
Total Amount Due	-\$15,663.69

View Bill

Make a Payment

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: 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

> 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

BILL CYCLE

YEAR

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...

<input type="checkbox"/>	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:

The screenshot shows a 'Total Amount Due' tile. At the top, it states 'Your most recent payment of \$3,195.41 on September 4, 2020 is pending.' Below this is a table with four rows: 'Remaining Balance' at \$2,210.57, 'Current Charges' at \$1,039.45, 'Statement Balance' at \$3,250.02, and 'Total Amount Due' at \$3,195.41. At the bottom of the tile are two buttons: a solid blue 'View Bill' button and a white 'Make a Payment' button with a blue border.

Total Amount Due	
<i>Your most recent payment of \$3,195.41 on September 4, 2020 is pending.</i>	
Remaining Balance	\$2,210.57
Current Charges	\$1,039.45
Statement Balance	\$3,250.02
Total Amount Due	\$3,195.41
View Bill	
Make a Payment	

- 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.

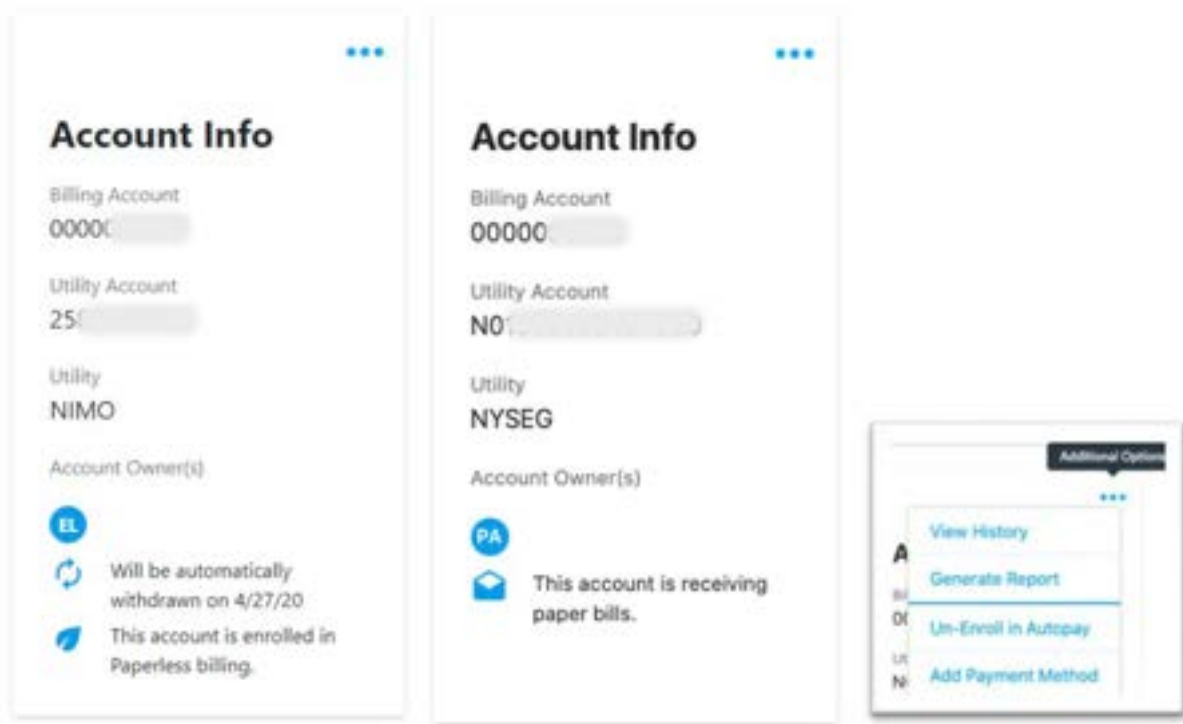
View Bill/Statement

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

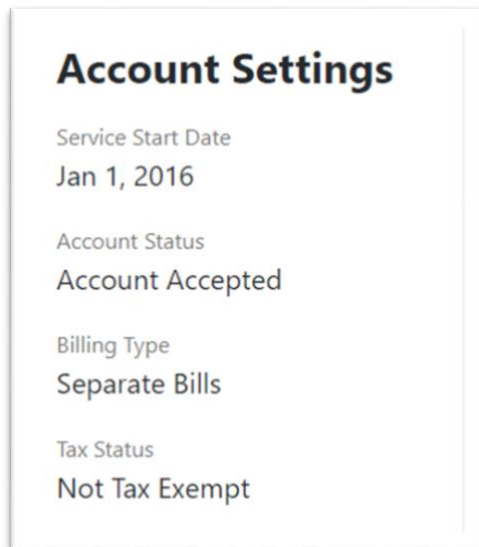
Contact tile has the following information:

- 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

April 14, 2020 - May 12, 2020

▼

Retail Adder Charge

30320 KWH @ 0.000990 / KWH for 29 days

\$30.02

\$30.02

>

Energy Imbalance Charge

\$528.27

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

Billing Days

29

Average Daily Charges

\$35.84

*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

April 14, 2020 - May 12, 2020

▼ Retail Adder Charge

30320 KWH @ 0.000990 / KWH for 29 days

\$30.02

\$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](#) >

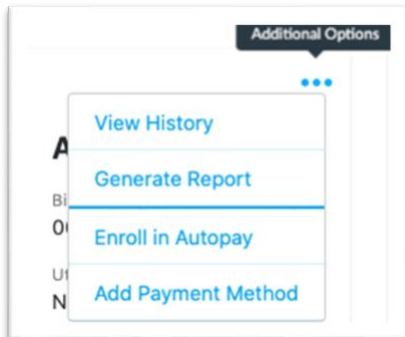
BILL PERIOD FROM	BILL PERIOD TO	METER NUMBER	TOTAL kWh	TOTAL kW
03/12/2020	04/10/2020		17360	0
02/11/2020	03/12/2020		20480	0

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

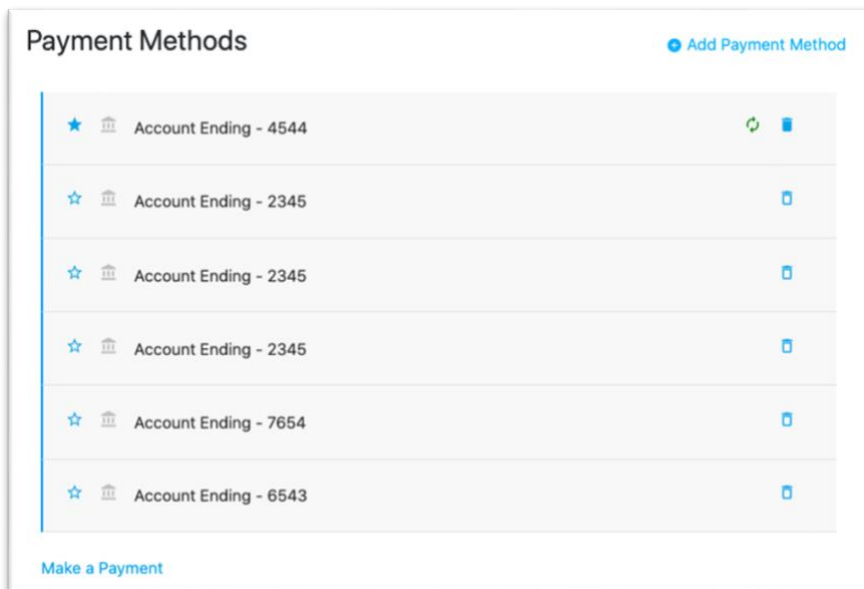
[Export to excel](#)

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)

The screenshot shows a web form titled "ENGIE Resources LLC Payment Method". At the top right, there is a link "Add Payment Method" with a blue arrow pointing to it. The form has a tabbed interface with "ACH" selected. The form fields are as follows:

- 9-digit Routing #: [Text field]
- Account number: [Text field]
- Re-enter account number: [Text field]
- Billing Information: [Section header]
- United States of America: [Dropdown menu]
- Company name: [Text field]
- First and last name: [Text field]
- Address Line 1: [Text field]
- Address Line 2: [Text field]
- City: [Text field]
- State: [Dropdown menu]
- Postal code: [Text field]
- Phone number: [Text field]
- Email address: [Text field]
- * required: [Text]
- Save: [Button]

At the bottom, there is a footer with "© 2020 CIO Fintech Payments, Inc.", "Security", "Privacy", and "TOS" links.

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.

The screenshot shows a web form titled "ENGIE Resources LLC Payment Method". At the top right, there is a link "Add Payment Method" with a blue arrow pointing to it. The form has a tabbed interface with "Card" selected. The form fields are as follows:

- Card number: [Text field]
- MM/YY: [Text field]
- Billing Information: [Section header]
- United States of America: [Dropdown menu]
- Company name: [Text field]
- First and last name: [Text field]
- Postal code: [Text field]
- * required (only one name field is required): [Text]
- Save: [Button]

At the bottom, there is a footer with "© 2020 CIO Fintech Payments, Inc.", "Security", "Privacy", and "TOS" links.

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**.

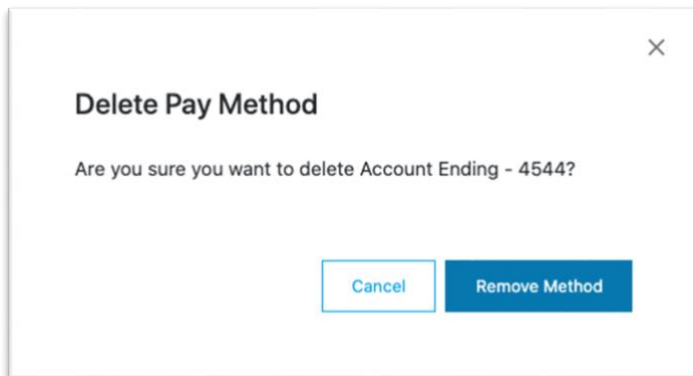
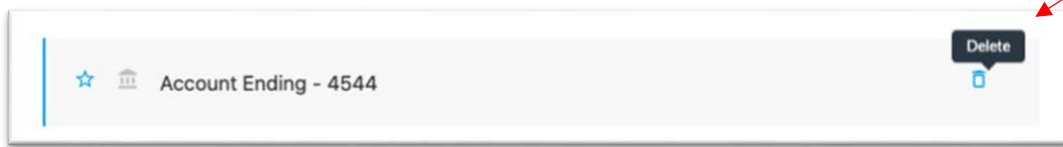
The screenshot shows a web form titled "ENGIE Resources LLC" with a sub-header "Payment Method". There are two tabs: "Card" (selected) and "eCheck". The "Card" tab contains the following fields:

- Card Number: A text box with "XXXXXXXXXX0005" entered.
- Expiration Date: A text box with "02/2025" entered.
- Card Type: A dropdown menu showing "Visa" and "MasterCard" options.
- Billing Information: A section with a dropdown menu set to "United States of America".
- Cardholder Name: A text box with "Cupcakes R Us" entered.
- Address: A text box with "Betty Crocker" entered.
- Zip Code: A text box with "77059" entered.

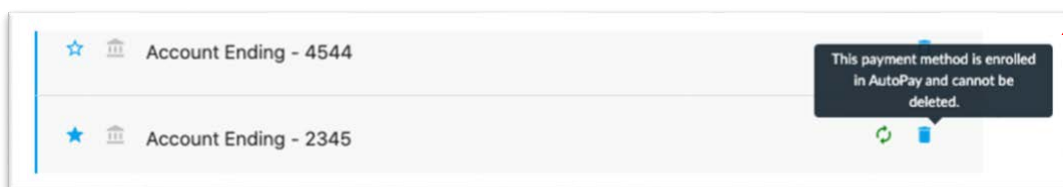
At the bottom right of the form, there is a green "Save" button, which is highlighted with a red rectangular box. The footer of the form includes "© 2017 ENGIE Resources LLC" and "Security" and "Privacy" links.

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

Delete Payment Method



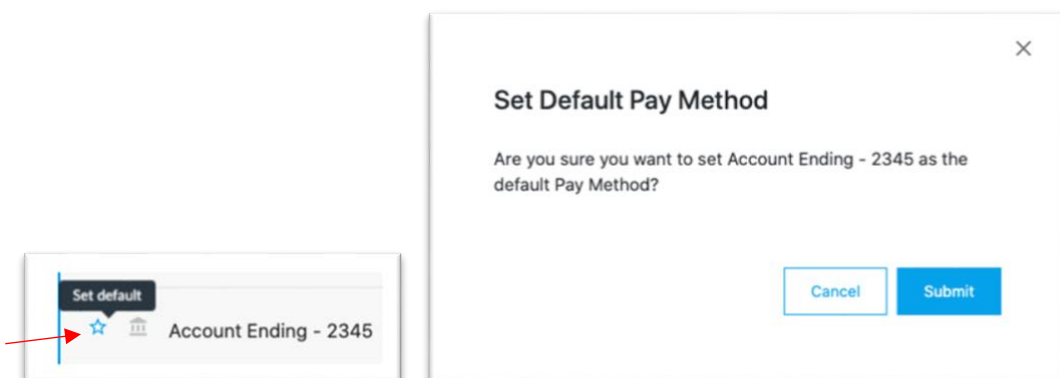
If you no longer need a payment method, you can remove it from the list. Click on the trash can icon to the right of the payment method to delete it. A pop up will appear asking you to confirm you want to delete the payment method. Click **Remove Method** to continue. The payment method will then be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



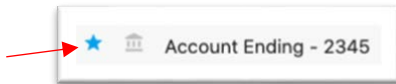
Please note that a payment **cannot** be deleted if it is the payment method that is enrolled in AutoPay. AutoPay is always tied to the default payment method. If you do want to delete a payment method that is associated with AutoPay, change the default payment method and it will tie AutoPay with that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

Default Payment Method

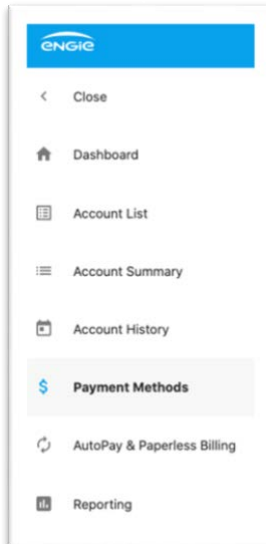
To change the default payment method, click on the star next to the account you would like to change it to.



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.

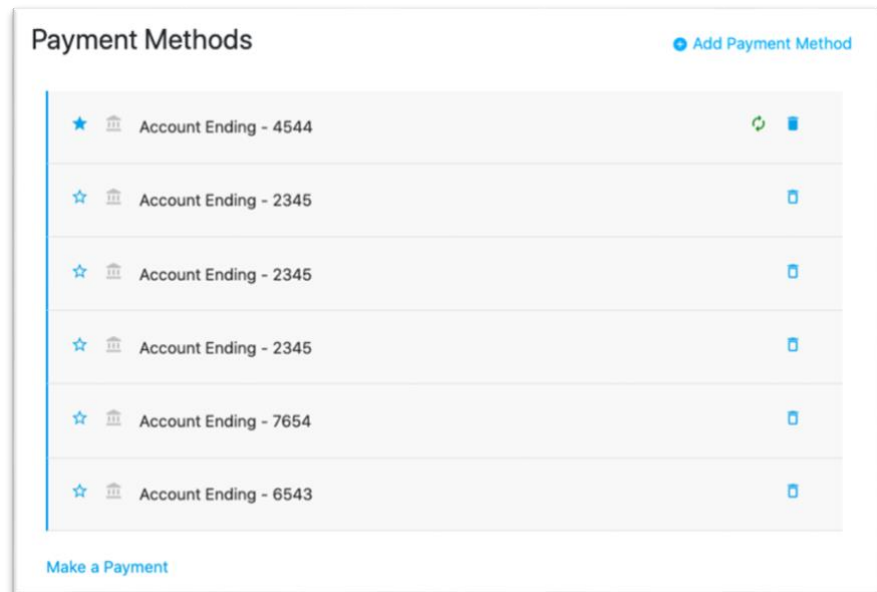


Add/Delete a Payment Method: Scenario 2



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)

The screenshot shows a web form titled "ENGIE Resources LLC Payment Method" with a close button (X) in the top right corner. A red arrow points to the "Add Payment Method" link in the top right of the page. The form has two tabs: "ACH" (selected) and "Card". The "ACH" tab contains the following fields: "9-digit Routing #", "Checking" (dropdown), "Account number", "Re-enter account number", "Billing information" (United States of America), "Company name", "First and last name", "Address Line 1", "Address Line 2", "City", "State" (dropdown), "Postal code", "Phone number", and "Email address". A "Save" button is at the bottom right. A footer bar contains "© 2020 CIO Forte Payments, Inc.", "Security", "Privacy", and "TOS" links.

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.

The screenshot shows a web form titled "ENGIE Resources LLC Payment Method" with a close button (X) in the top right corner. The form has two tabs: "Card" (selected) and "ACH". The "Card" tab contains the following fields: "Card number" (masked as XXXX XXXX XXXX XXXX), "MM/YY" (masked as MM/YY), "Billing information" (United States of America), "Company name", "First and last name", and "Postal code". A "Save" button is at the bottom right. A footer bar contains "© 2020 CIO Forte Payments, Inc.", "Security", "Privacy", and "TOS" links.

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**.

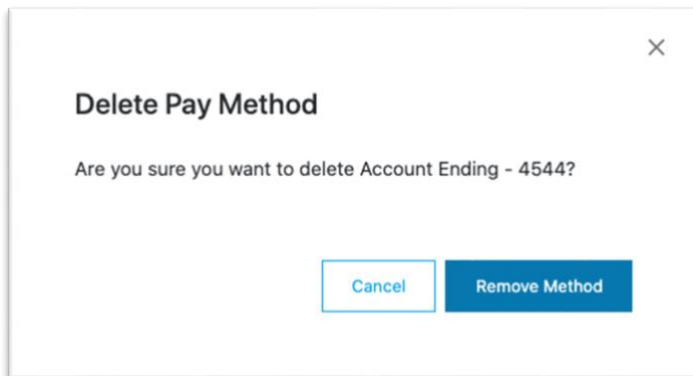
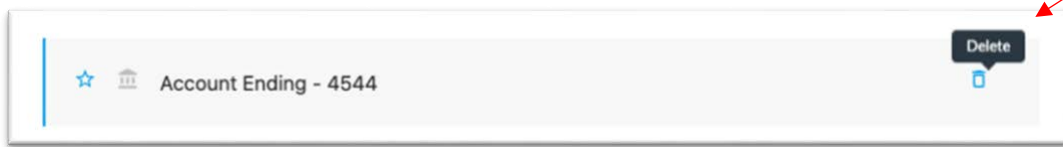
The screenshot shows a web form titled "ENGIE Resources LLC" with a sub-header "Payment Method". There are two tabs: "Card" (selected) and "eCheck". The "Card" tab contains the following fields:

- Card Number: A text box with "0005" entered.
- Expiration Date: A dropdown menu showing "02 2025".
- Billing Information: A dropdown menu showing "United States of America".
- Cardholder Name: A text box with "Cupcakes R Us" entered.
- Address: A text box with "Betty Crocker" entered.
- Zip: A text box with "77059" entered.

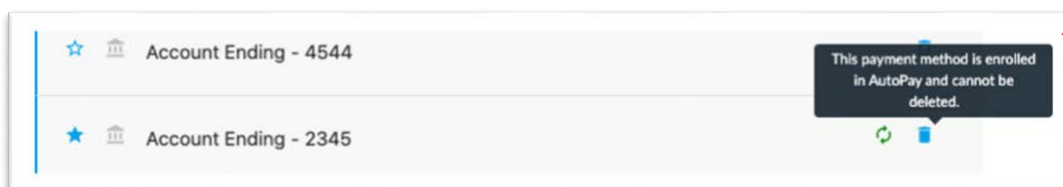
At the bottom right of the form, there is a green "Save" button, which is highlighted with a red rectangular box. The bottom of the screen shows a Windows taskbar with icons for Security, Windows, and Task View.

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

Delete Payment Method



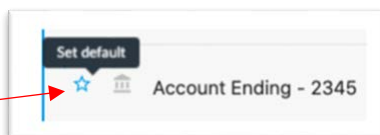
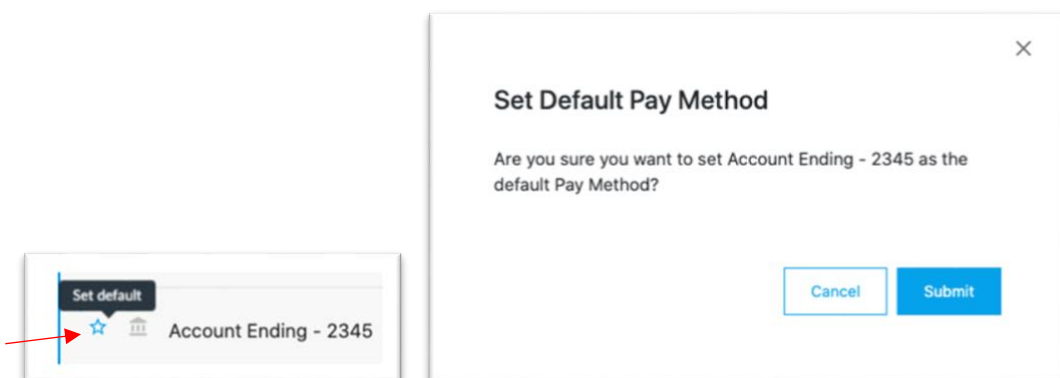
If you no longer need a payment method, you can remove it from the list. Click on the trash can icon to the right of the payment method to delete it. A pop up will appear asking you to confirm you want to delete the payment method. Click **Remove Method** to continue. The payment method will then be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



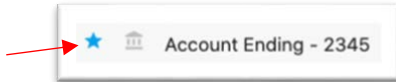
Please note that a payment **cannot** be deleted if it is the payment method that is enrolled in AutoPay. AutoPay is always tied to the default payment method. If you do want to delete a payment method that is associated with AutoPay, change the default payment method and it will tie AutoPay with that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

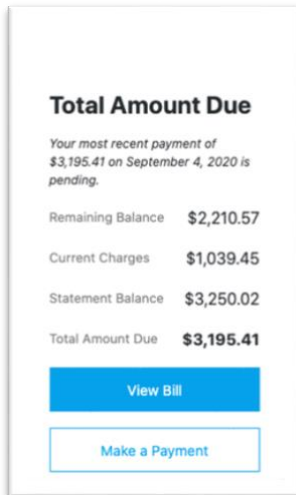


A pop up will appear, asking you to confirm you want to set it as the default pay method. Select **Submit** to continue. A blue star icon will now appear next to the new default pay method.



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

Total Amount Due

\$3,195.41

AutoPay applied for Jul 17

[View Bill](#)

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

[View Bill](#)

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

Payment Amount

Payment Amount ▼

Total Amount Due \$3,195.41

Payment Amount \$900.00

Remaining Balance \$2,210.57

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
te.

gy account on your
appear on your bank

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](#)

More Options

- [Add Payment Method](#)
- [Update Billing Address](#)
- [Unenroll in Autopay](#)
- [Enroll in Paperless Billing](#)
- [View History](#)
- [Generate Report](#)
- [Share Account](#)
- [Transfer Account](#)
- [Release Account](#)

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

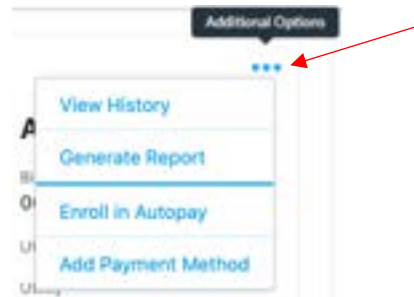
Postal Code

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.

The screenshot shows a search interface at the top with fields for 'Account' (00000), 'From Date' (6/20/2020), and 'To Date' (9/18/2020), followed by a 'Search' button. Below this is a table of transaction history.

<input type="checkbox"/>	BILLING ACCOUNT	TYPE	STATUS	PAYMENT AMOUNT	TRANSACTION DATE	STATEMENT PERIOD	USAGE	CURRENT CHARGES	STATEMENT BALANCE
<input type="checkbox"/>	00000	eCheck	Pending	(\$3,395.41)	09/04/2020				
<input type="checkbox"/>	00000	eCheck	Pending	(\$3,400.23)	09/03/2020				
<input type="checkbox"/>	00000	eCheck	Pending	(\$3,395.41)	09/03/2020				
<input type="checkbox"/>	00000	eCheck	Pending	(\$3,395.41)	09/02/2020				
<input type="checkbox"/>	00000	eCheck	Cancelled	(\$2,210.57)	07/15/2020				
<input type="checkbox"/>	00000	eCheck	Cancelled	(\$2,210.57)	07/13/2020				
<input type="checkbox"/>	00000	eCheck	Cancelled	(\$2,210.57)	07/13/2020				
<input type="checkbox"/>	00000	eCheck	Cancelled	(\$2,210.57)	07/10/2020				
<input type="checkbox"/>	00000	eCheck	Cancelled	(\$2,210.57)	07/10/2020				
<input type="checkbox"/>	00000	eCheck	Cancelled	(\$2,210.57)	07/10/2020				

At the bottom of the table, there is a pagination bar showing '1 to 11 of 12' and 'Page 1 of 2'. Below the table, there are controls for 'Rows per page' (set to 10) and an 'Export to Excel' button.

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

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

Account

From Date

To Date

<input type="checkbox"/>	BILLING ACCOUNT	TYPE	STATUS	PAYMENT AMOUNT	TRANSACTION DATE	STATEMENT PERIOD	USAGE	CURRENT CHARGES	STATEMENT BALANCE
	00000	eCheck	Cancelled	(\$2,250.57)	07/15/2020				
	00000	eCheck	Cancelled	(\$2,250.57)	07/15/2020				
	00000	eCheck	Cancelled	(\$2,250.57)	07/15/2020				
	00000	eCheck	Cancelled	(\$2,250.57)	07/15/2020				
	00000	eCheck	Cancelled	(\$2,250.57)	07/15/2020				
	00000	eCheck	Cancelled	(\$2,250.57)	07/15/2020				
	00000	eCheck	Cancelled	(\$2,250.57)	07/15/2020				
	00000	eCheck	Cancelled	(\$2,250.57)	07/15/2020				
	00000	eCheck	Cancelled	(\$2,250.57)	07/15/2020				

1 to 9 of 9

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.

×

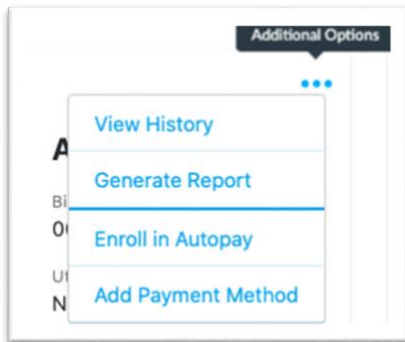
Cancel Scheduled Payment

Are you sure you want to cancel this payment?

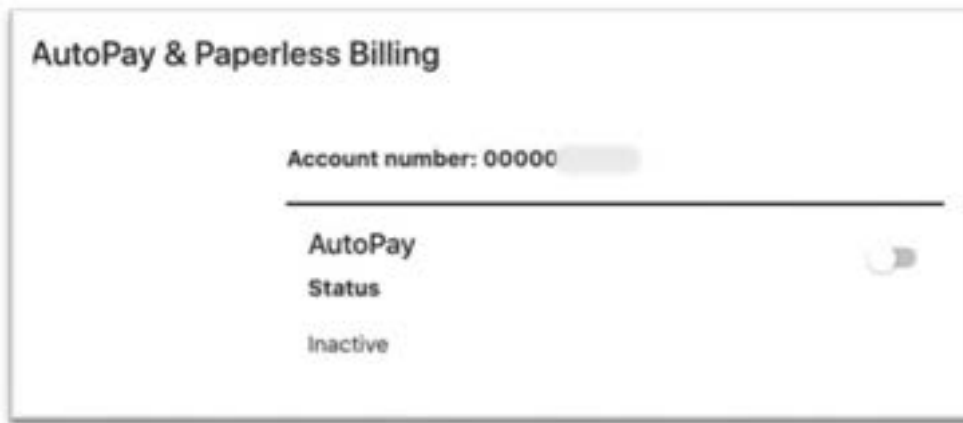
Don't Cancel
Cancel Payment

Enroll in AutoPay

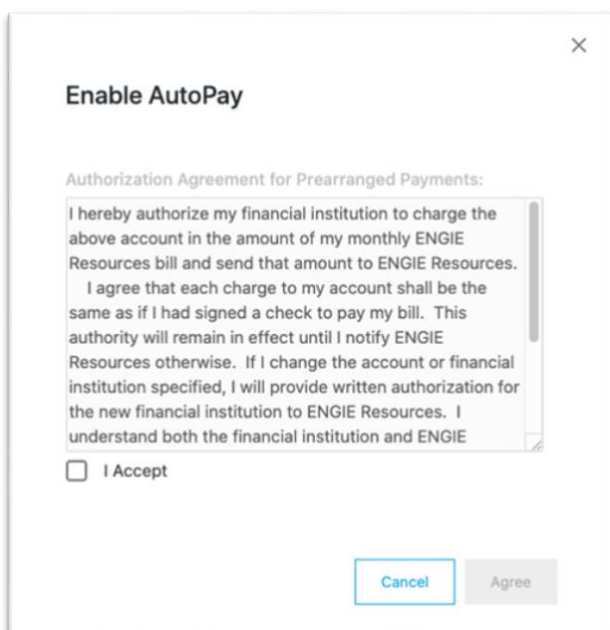
When you are on your account detail view, click on the three horizontal blue dots at the top of **Account Info** tile.



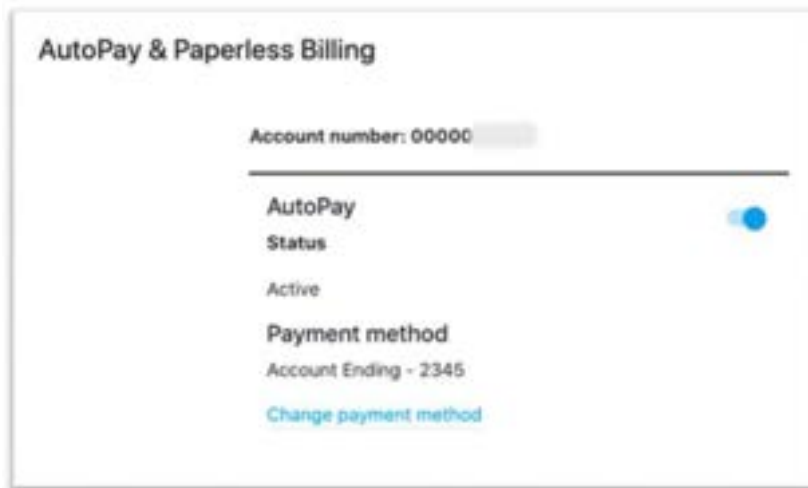
Click the option **Enroll in AutoPay**. This will take you to the **AutoPay & Paperless Billing** page for that specific account.



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.

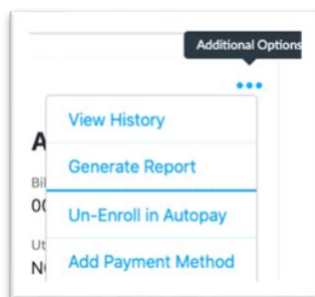


The toggle is now on and active with the default payment method used.

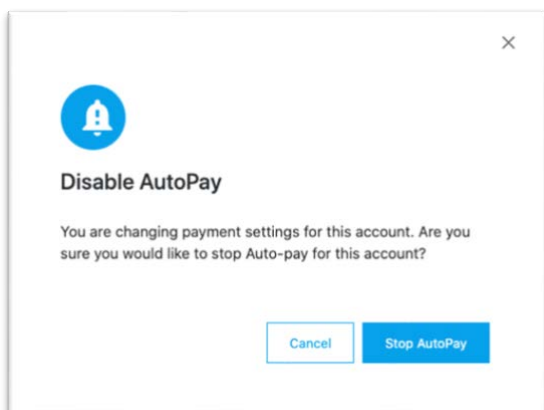


Un-Enroll in AutoPay

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

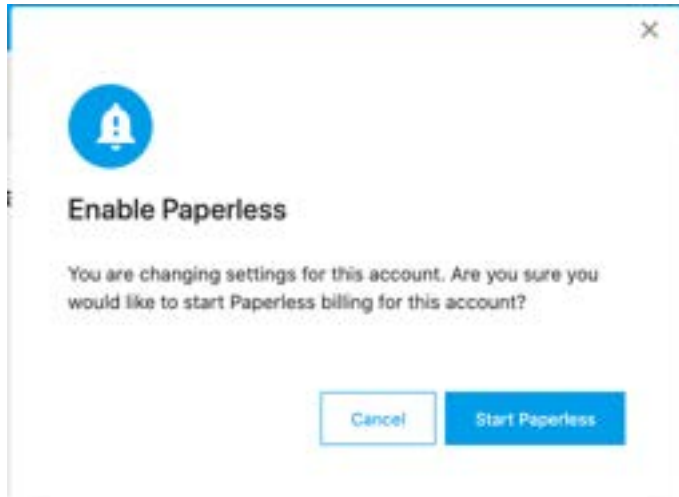
Paperless billing

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

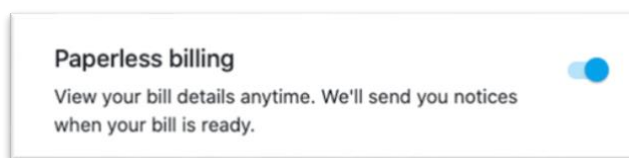
E-Bill Delivery Address

email address

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

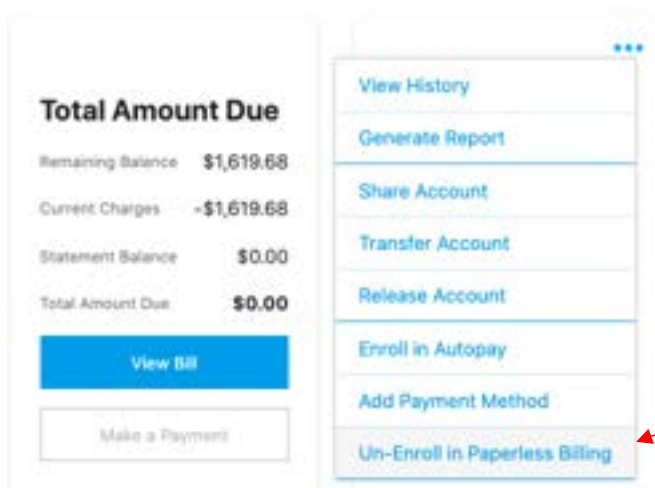


Click **Start Paperless** to continue and now the toggle is on and you are enrolled.



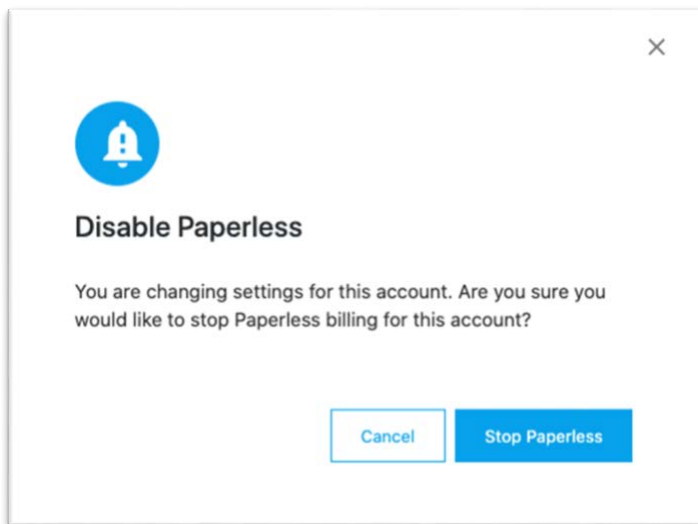
Un-Enroll in Paperless Billing

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

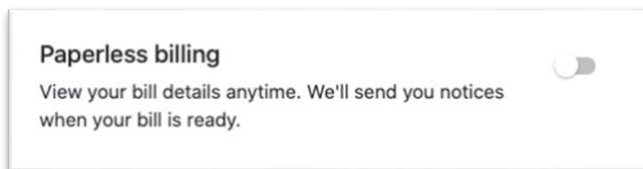


Click on **Un-Enroll in Paperless Billing**. This will take you to the AutoPay & Paperless Billing page.

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



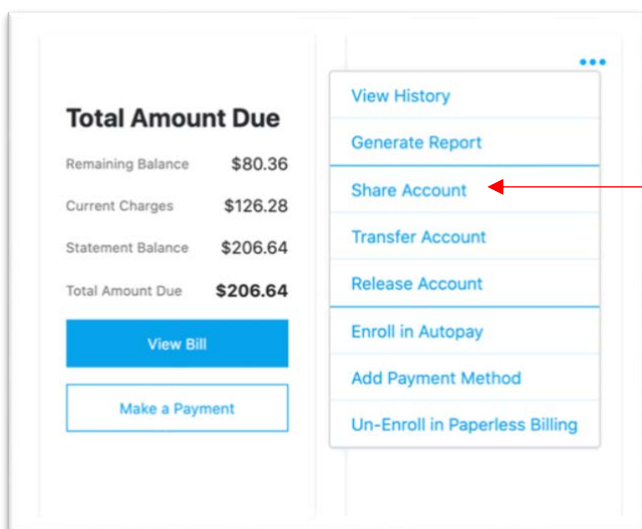
Click **Stop Paperless** to continue and now the toggle is off and you will start receiving paper bills with the next billing cycle.



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**.

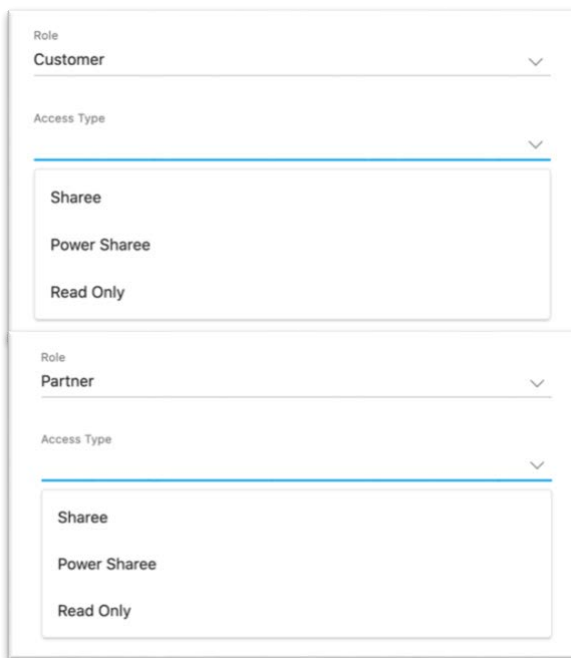


The **Share Accounts** screen will appear where you can enter one or more email address in which you want to share the specified account with.

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

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 open, showing 'Customer' as the selected option. Below the dropdown, there is 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 two instances of the 'Access Type' dropdown menu. The first instance has 'Customer' selected in the 'Role' dropdown, and the 'Access Type' dropdown is open, showing 'Sharee' as the selected option. The second instance has 'Partner' selected in the 'Role' dropdown, and the 'Access Type' dropdown is open, showing 'Sharee' as the selected option. Both dropdowns show 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.

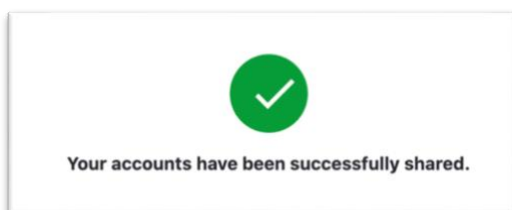
- **Power Sharee**

*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 Bill](#)

[Make a Payment](#)

- [View History](#)
- [Generate Report](#)
- [Share Account](#)
- [Transfer Account](#)
- [Release Account](#)
- [Enroll in Autopay](#)
- [Add Payment Method](#)
- [Un-Enroll in Paperless Billing](#)

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

000000

Email

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

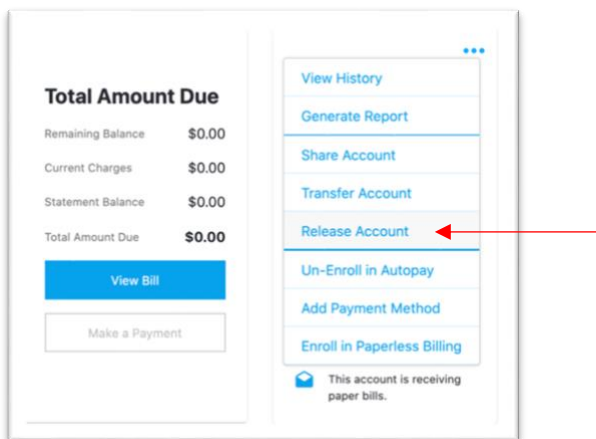
With Read Only access, a user can view all information pertinent to the account, however, they are only able to edit their user profile.

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

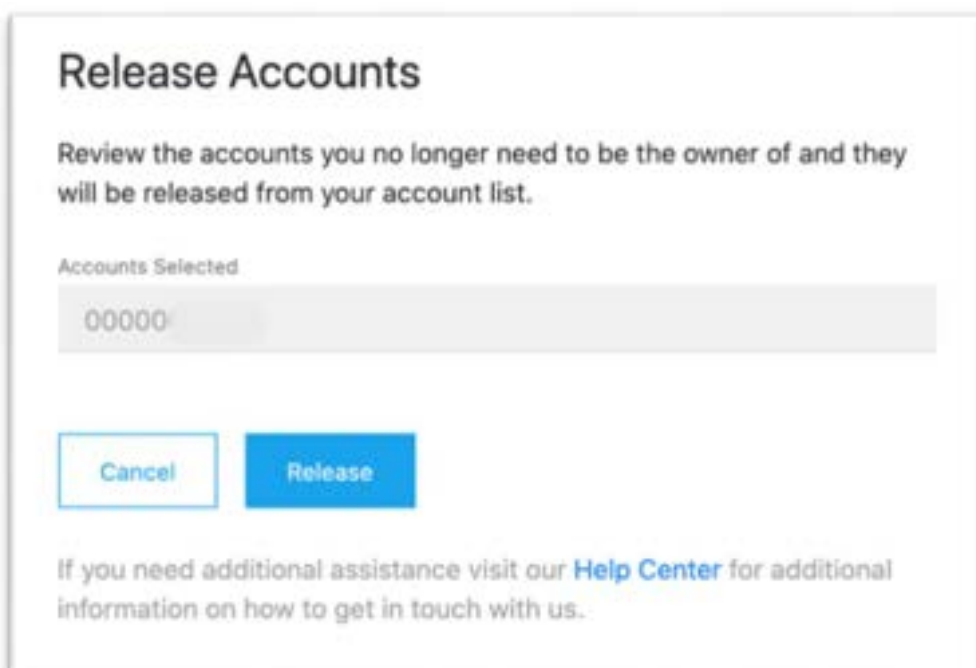
Release Account(s)

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

CH2M

Close

CO. - 00000

Dashboard

Account List

Account Summary

Account History

Payment Methods

AutoPay & Paperless Billing

Reporting

Total Amount Due

Your most recent payment of \$2,195.41 on September 4, 2020 is pending.

Remaining Balance \$2,215.57

Current Charges \$1,039.45

Statement Balance \$3,250.02

Total Amount Due \$3,195.41

View Bill

Make a Payment

Account Information

Billing Account 00000

Utility Account NO

Utility NYSEG

Account Details

Will be auto-withdrawn

This account paper bills

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

☐ Select All

☐ Statement Id

☐ Statement Date

☐ Contract Name

☐ Customer Name

☐ Supplier Account Name

☐ Billing Account Number

☐ Utility Account Number

☐ Billing Address

☐ Service Address

☐ Transaction Type

☐ From Date

☐ To Date

☐ kWh Usage

☐ Previous Balance

Meter Information

☐ Select All

☐ Statement Date

☐ Contract Name

☐ Customer Name

☐ Supplier Account Name

☐ Billing Account Number

☐ Utility Account Number

☐ Client Id

☐ Meter Number

☐ Meter Multiplier

☐ Beginning Meter Read

☐ Start Date

☐ End Date

☐ Quantity

☐ 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

Cancel

Generate 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.

 CP_Report__2020_....xlsx

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.	SB	1 NO
CO.	SB	1 NO
CO.	SB	1 NO
CO.	SB	1 NO
CO.	SB	1 NO
CO.	SB	1 NO

Billing

Meter

Billing

Meter

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

This view is when a user has summary bill accounts.

BILLING ACCOUNT	NAME	BILLING ADDRESS	STATEMENT BALANCE	DUE BY	OWNER
0001	0001	CHARLOTTE, NC 28244027	\$0.00	08/14/2020	13

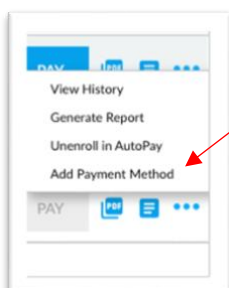
UTILITY ACCOUNT	STATUS	SERVICE START DATE	SERVICE ADDRESS	UTILITY
0001	ON	08/01/2020		COMED

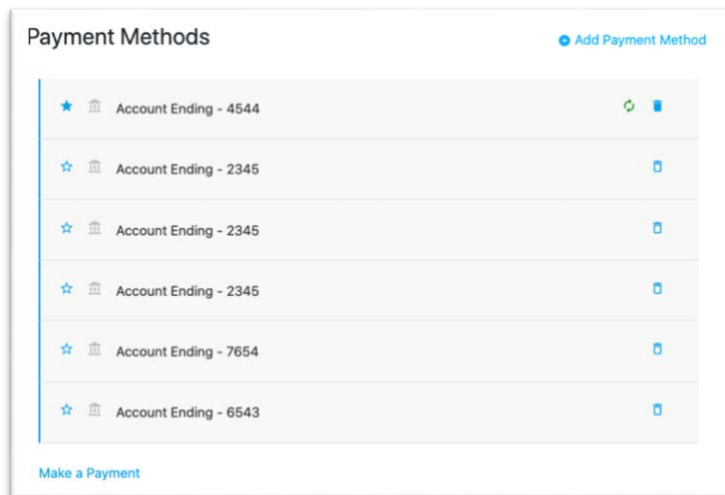
BILLING ACCOUNT	NAME	BILLING ADDRESS	STATEMENT BALANCE	DUE BY	OWNER
0001	0001	EDMUNDS, NY 10408	\$29,335.34	06/04/2020	13
0001	0001	HARTSDALE, NY 10530	\$3,047.39	06/04/2020	13
0001	0001	SPOKANE, WA 99202440	\$247.00	05/08/2020	13
0001	0001	SPOKANE, WA 99202	\$764.94	05/05/2020	13
0001	0001	SPOKANE, WA 99202	\$1,157.20	05/07/2020	13
0001	0001	SPOKANE, WA 99202	\$113.40	05/15/2020	13
0001	0001	NEW YORK, NY 10000	\$793.25	05/14/2020	13
0001	0001	SPOKANE, WA 99202	\$1,270.90	11/18/2019	13

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)

The screenshot shows a 'Payment Method' form for 'ENGIE Resources LLC'. A red arrow points to the 'Add Payment Method' link at the top right. The form includes fields for '9-digit Routing #', 'Account number', 'Re-enter account number', 'Company name', 'First and last name', 'Address Line 1', 'Address Line 2', 'City', 'State' (dropdown), 'Postal code', 'Phone number', and 'Email address'. A 'Save' button is at the bottom right. A legend indicates that fields with an asterisk are required.

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.



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

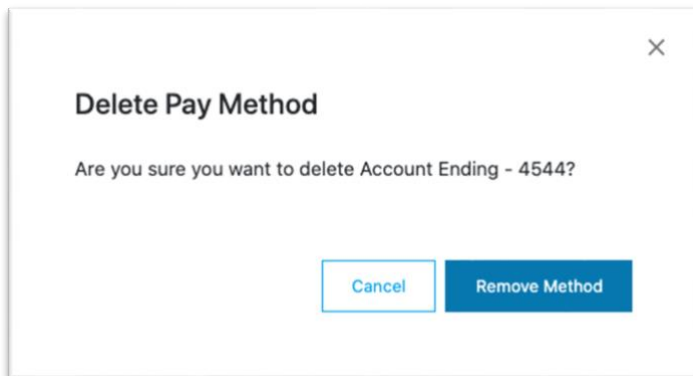
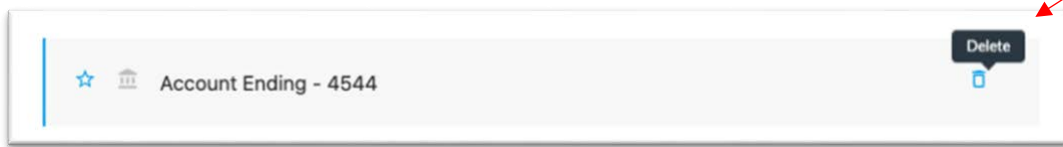
Billing Information United States of America

Cupcakes R Us
Betty Crocker
77059

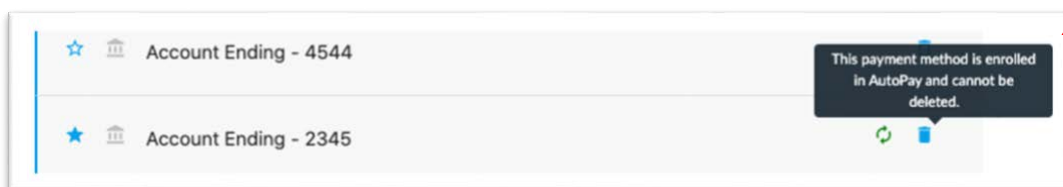
Save

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

Delete Payment Method



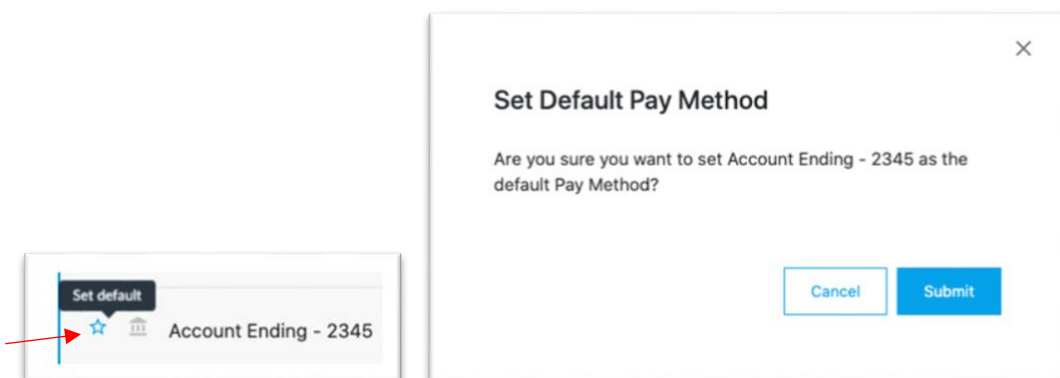
If you no longer need a payment method, you can remove it from the list. Click on the trash can icon to the right of the payment method to delete it. A pop up will appear asking you to confirm you want to delete the payment method. Click **Remove Method** to continue. The payment method will then be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



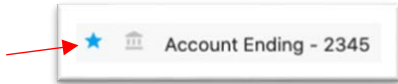
Please note that a payment **cannot** be deleted if it is the payment method that is enrolled in AutoPay. AutoPay is always tied to the default payment method. If you do want to delete a payment method that is associated with AutoPay, change the default payment method and it will tie AutoPay with that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

Default Payment Method

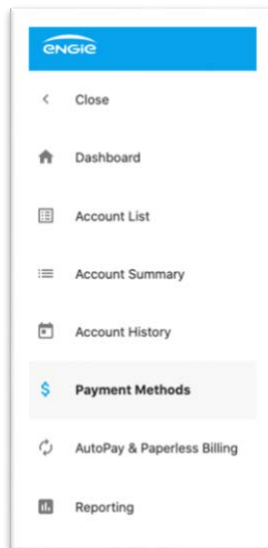
To change the default payment method, click on the star next to the account you would like to change it to.



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.

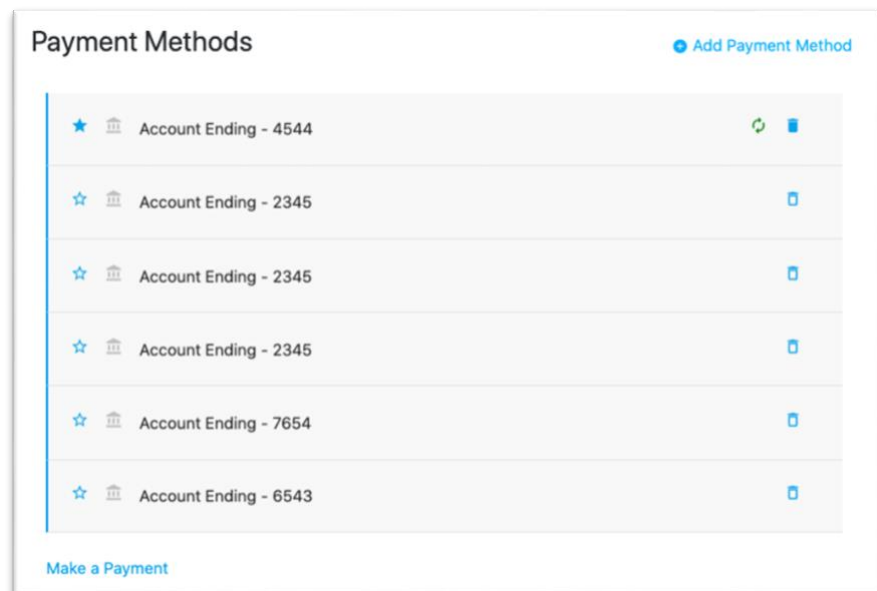


Add/Delete a Payment Method: Scenario 2



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)

A screenshot of the 'Add Payment Method' form for 'ENGIE Resources LLC'. The form is titled 'Payment Method' and has a close button (X) in the top right corner. It contains several input fields: '9-digit Routing #' (highlighted with an orange box), 'Checking' (a dropdown menu), 'Account number' (highlighted with an orange box), 'Re-enter account number' (highlighted with an orange box), 'Billing Information' (a section header), 'United States of America' (a dropdown menu), 'Company name' (highlighted with an orange box), 'First and last name', 'Address Line 1', 'Address Line 2', 'City', 'State' (a dropdown menu), 'Postal code' (highlighted with an orange box), 'Phone number', and 'Email address'. There is a 'Save' button at the bottom right. A red arrow points from the 'Add Payment Method' link in the top right of the previous page to this form. At the bottom of the form, there is a small text that says '* required'.

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.

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

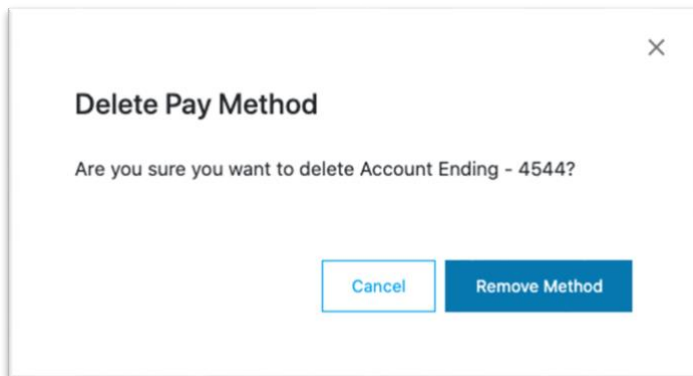
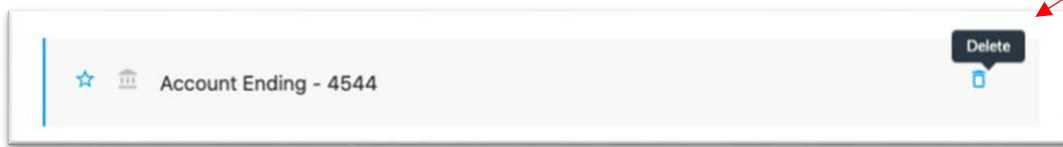
Billing Information United States of America

Cupcakes R Us
Betty Crocker
77059

Save

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

Delete Payment Method



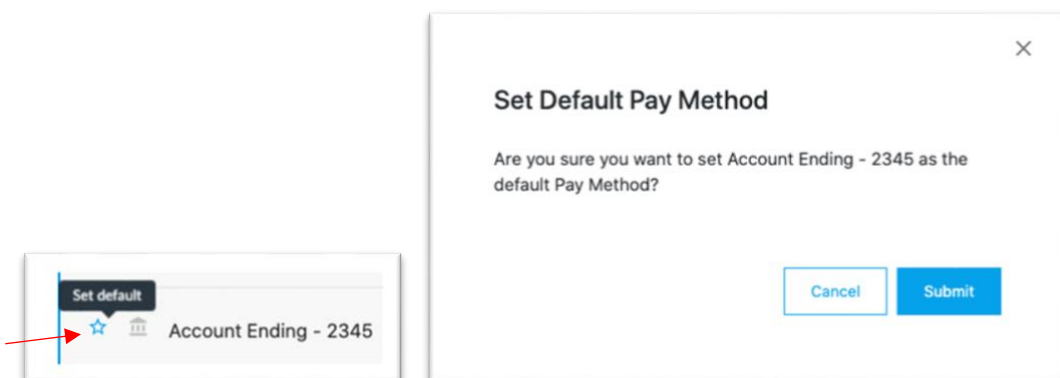
If you no longer need a payment method, you can remove it from the list. Click on the trash can icon to the right of the payment method to delete it. A pop up will appear asking you to confirm you want to delete the payment method. Click **Remove Method** to continue. The payment method will then be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



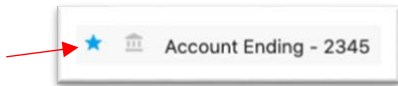
Please note that a payment **cannot** be deleted if it is the payment method that is enrolled in AutoPay. AutoPay is always tied to the default payment method. If you do want to delete a payment method that is associated with AutoPay, change the default payment method and it will tie AutoPay with that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

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.

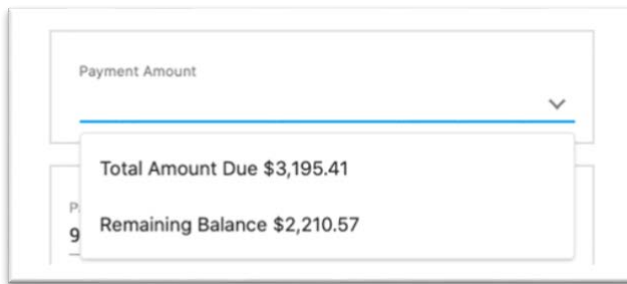
A screenshot of the 'Payment' screen. At the top, it shows 'Total Amount Due' as '\$3,195.41'. Below this, it says 'AutoPay applied for Jul 17' with a green circular arrow icon and a 'View Bill' link. A note states: 'Please Note: This is the final step to submit your payment. Be sure to double check that all of your information is correct!'. There are three input fields: 'Payment Amount' (a dropdown menu), 'Payment Date' (set to '9/18/2020' with a calendar icon), and 'Payment Method' (a dropdown menu). A blue box with text says: 'Payments can be scheduled up to and including your due date. Please select a date between today and your next due date.' At the bottom is a blue 'Submit Payment' button.A close-up screenshot of the top section of the payment screen. It displays 'Total Amount Due' as '\$3,195.41'. Below the amount, it says 'AutoPay applied for Jul 17' with a green circular arrow icon. At the bottom of this section is a blue 'View Bill' link.

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](#)

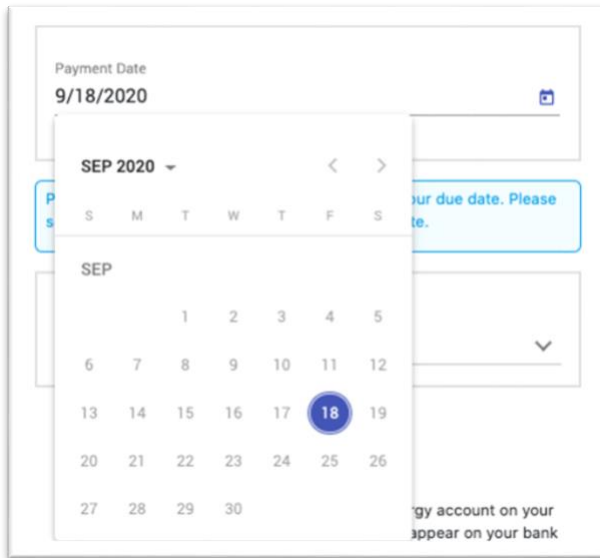
You can also view your bill you are paying on here. This will open up a PDF of the statement.

Payment Amount

A screenshot of a web form showing a dropdown menu for 'Payment Amount'. The dropdown is open, displaying two options: 'Total Amount Due \$3,195.41' and 'Remaining Balance \$2,210.57'. The dropdown is triggered by a blue caret icon.

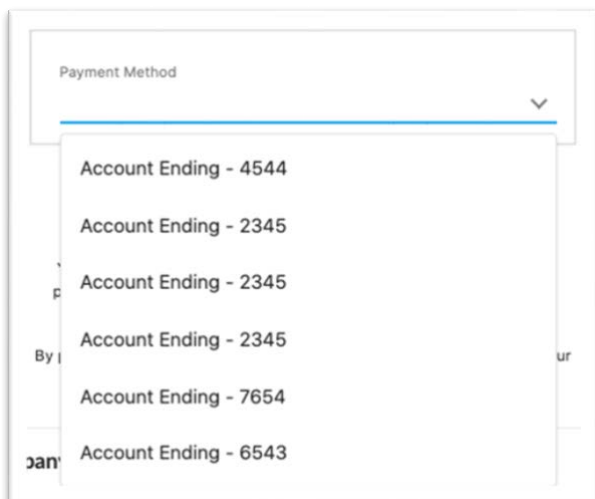
When clicking on the caret (down arrow), you will see the total amount due and the remaining balance.

Payment Date

A screenshot of a web form showing a calendar for 'Payment Date'. The date '9/18/2020' is selected. The calendar is for September 2020, and the 18th is highlighted. A blue box with text is visible on the right side of the calendar.

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

Payment Method

A screenshot of a web form showing a dropdown menu for 'Payment Method'. The dropdown is open, displaying a list of account numbers: 'Account Ending - 4544', 'Account Ending - 2345', 'Account Ending - 2345', 'Account Ending - 2345', 'Account Ending - 7654', and 'Account Ending - 6543'. The dropdown is triggered by a blue caret icon.

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

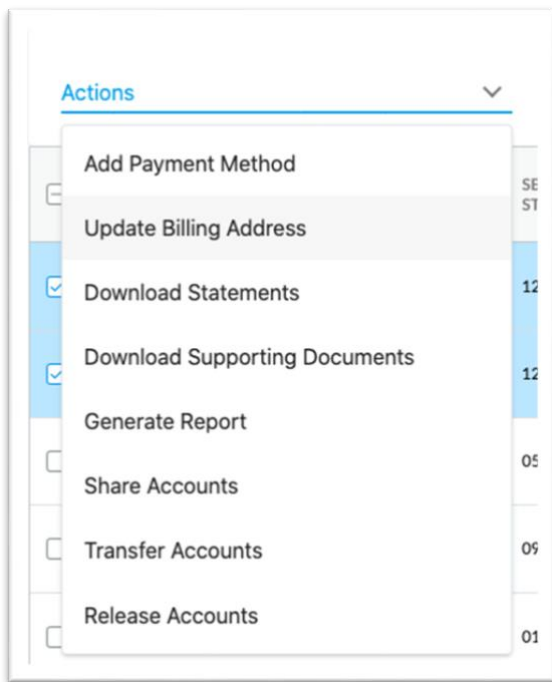
Click **Submit Payment**. A confirmation will pop up with an authorization number.

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.

Billing Account	Utility Account	Status	Service Start	Service Address	Utility	Owner	Statement Balance	Due By	Actions
1001	1001	Active	01/01/2019	1001, NY 10001	NYSG	10	\$120.00	01/15/2020	<input type="checkbox"/> Edit
1002	1002	Active	01/01/2019	1002, NY 10001	NYSG	10	\$120.00	01/15/2020	<input type="checkbox"/> Edit

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

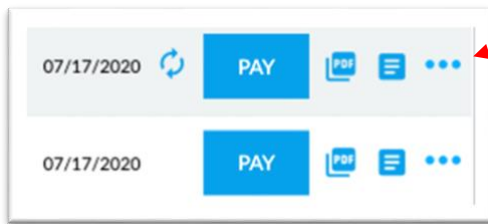


This will take you to the **Update Billing Address** page. Enter the information you would like updated, and press save. Once you go back to your account list view, the changes will be updated.

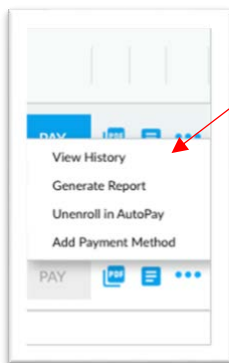
The screenshot shows the "Update Billing Address" form. The form title is "Update Billing Address" with a subtitle "Apply a single billing address to multiple accounts". The form includes several input fields: "Selected Accounts" (showing "0000"), "Address Line 1", "Address Line 2", "City", "State" (a dropdown menu), "Postal Code", and "Billing Email Address". At the bottom of the form 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.

<input type="checkbox"/>	BILLING ACCOUNT	TYPE	STATUS	PAYMENT AMOUNT	TRANSACTION DATE	STATEMENT PERIOD	USAGE	CURRENT CHARGES	STATEMENT BALANCE
<input type="checkbox"/>	00000	eCheck	Pending	(\$3,395.41)	09/04/2020				
<input type="checkbox"/>	00000	eCheck	Pending	(\$1,400.23)	09/03/2020				
<input type="checkbox"/>	00000	eCheck	Pending	(\$3,395.41)	09/03/2020				
<input type="checkbox"/>	00000	eCheck	Pending	(\$3,395.41)	09/02/2020				
<input type="checkbox"/>	00000	eCheck	Cancelled	(\$2,210.57)	07/15/2020				
<input type="checkbox"/>	00000	eCheck	Cancelled	(\$2,210.57)	07/13/2020				
<input type="checkbox"/>	00000	eCheck	Cancelled	(\$2,210.57)	07/13/2020				
<input type="checkbox"/>	00000	eCheck	Cancelled	(\$2,210.57)	07/10/2020				
<input type="checkbox"/>	00000	eCheck	Cancelled	(\$2,210.57)	07/10/2020				
<input type="checkbox"/>	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.

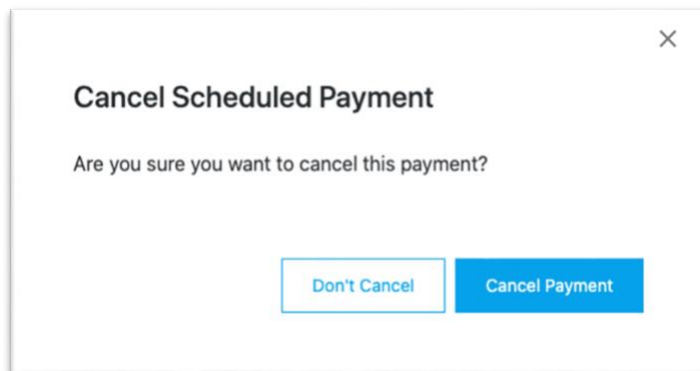
Cancel a Pending Payment

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



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



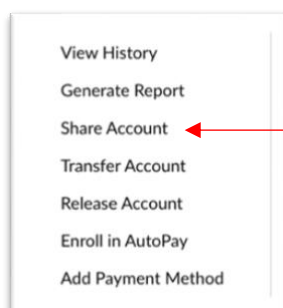
Share Account(s)

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.



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

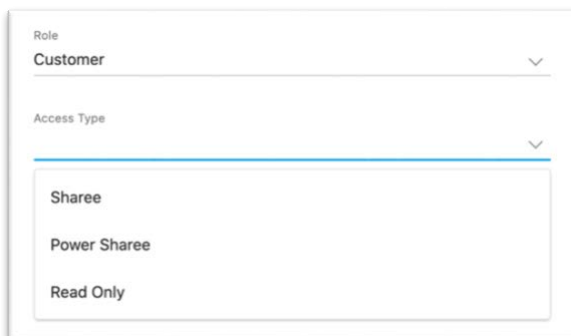


The **Share Accounts** screen will appear where you can enter one or more email address in which you want to share the specified account with.

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

A screenshot of a web form. At the top, there is an 'Email' field with the text 'test@engie.com,test2@engie.com'. Below it is a 'Role' dropdown menu. The dropdown is open, showing 'Customer' as the selected option. Below the dropdown, there is 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.

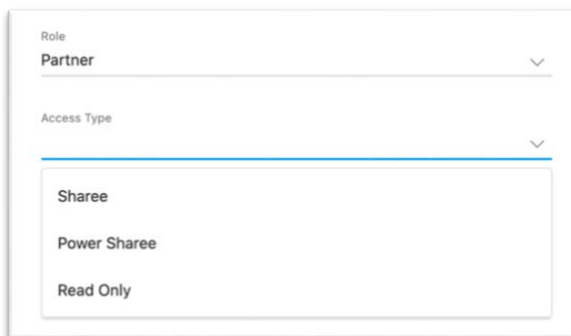
A screenshot of a web form. At the top, there is a 'Role' dropdown menu with 'Customer' selected. Below it is an 'Access Type' dropdown menu. The dropdown is open, showing 'Sharee' as the selected option. Below the dropdown, there is a list of options: 'Sharee', 'Power Sharee', and 'Read Only'.

- **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**

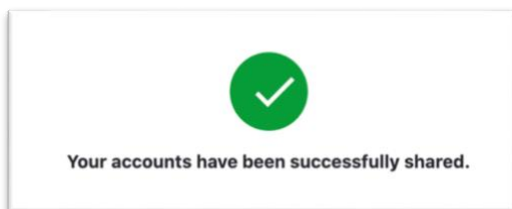
*With Power Sharee access, a user can perform all actions a **Sharee** can, but also can Share, Transfer, and Release Accounts.*

A screenshot of a web form. At the top, there is a 'Role' dropdown menu with 'Partner' selected. Below it is an 'Access Type' dropdown menu. The dropdown is open, showing 'Sharee' as the selected option. Below the dropdown, there is a list of options: 'Sharee', 'Power Sharee', and '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.

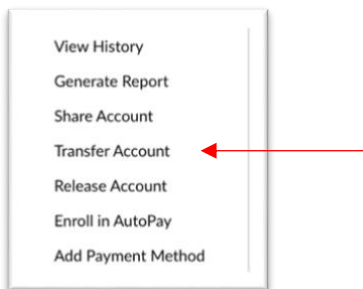
After selecting the Role and Access Type, Click **Share**. A message is displayed that the account(s) have been shared.



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.



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.

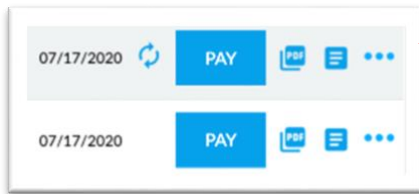
User this feature if you no longer need to be the owner of an account, and the account(s) will be released from your account list.

BILLING ACCOUNT	UTILITY ACCOUNT	STATUS	SERVICE START	SERVICE ADDRESS	UTILITY	OWNER	STATEMENT BALANCE	DUE BY		
0000	2221	●	02/05/2020	PELIHAM MANOR, NY	CONED	●	\$206.44	05/29/2020	PAY	<div>    </div> <div>Additional Options</div>

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

Generate Report

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



Click on the **Generate Report** option.



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

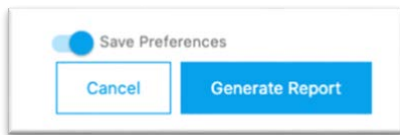
The **Generate Report** page displays a date range for the report. The page will default to the *To* billed date and the *From* billed date.

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.



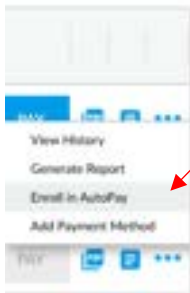
The excel file will have 2 tabs, one for **Billing Info** and one for **Meter Info**.



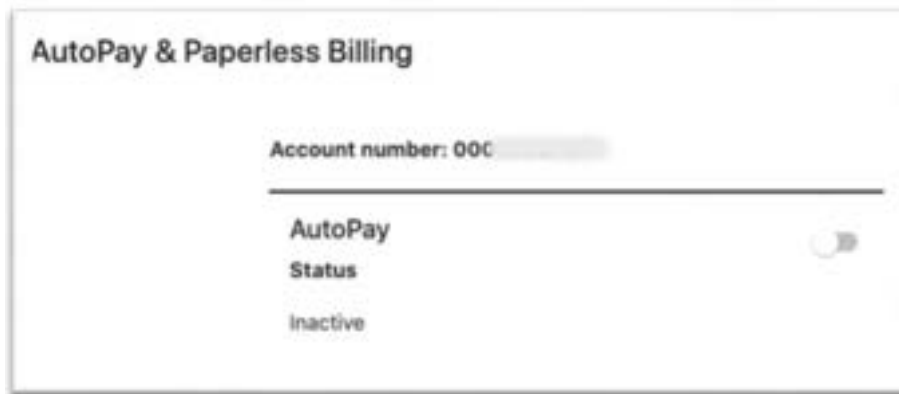
Enroll in AutoPay

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.

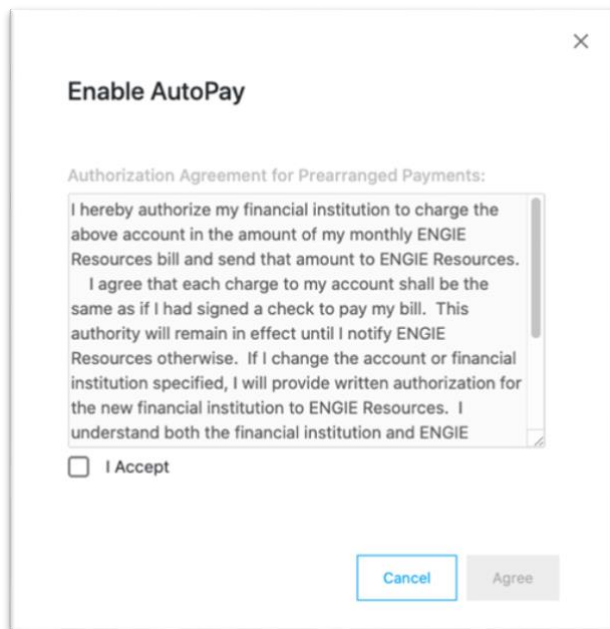




Click the option **Enroll in AutoPay**. This will take you to the **AutoPay & Paperless Billing** page for that specific account.



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.

AutoPay & Paperless Billing

Account number: 00000

AutoPay

Status

Active

Payment method

Account Ending - 2345

Change payment method

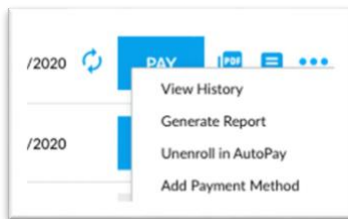
Un-Enroll in AutoPay

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



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

Click Un-Enroll in AutoPay.



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

Disable AutoPay

You are changing payment settings for this account. Are you sure you would like to stop Auto-pay for this account?

Cancel

Stop AutoPay

The toggle is now off and the AutoPay is off.

AutoPay

Status

Inactive

Bulk Actions

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

Bulk Actions

BILLING ACCOUNT	NAME	BILLING ADDRESS	STATEMENT BALANCE	DUE BY	OWNER	
<input type="checkbox"/> 0001		CHARLOTTE, NC 282344357	\$0.00	06/15/2020	TE	<div>PAY</div> <div></div> <div></div> <div></div>
<input type="checkbox"/> 0001		GENESEE, NY 14454	\$29,523.34	06/30/2020	MA	<div>PAY</div> <div></div> <div></div> <div></div>
<input type="checkbox"/> 0001		HARTFORD, CT 06103	\$3,047.39	06/04/2020	TE	<div>PAY</div> <div></div> <div></div> <div></div>

Bulk Actions

☐

Add Payment Method

Download Statements

☒ Download Supporting Documents

Generate Report

Share Accounts

Transfer Accounts

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 28234R357	\$0.00	08/15/2020	TE	<input type="checkbox"/> PAY <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<input checked="" type="checkbox"/> 0000		GENESEO, NY 14454	\$29,533.34	04/25/2020	TE	<input type="checkbox"/> PAY <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<input checked="" type="checkbox"/> 0000		HARTSDALE, NY 10530	\$1347.29	04/04/2020	TE	<input type="checkbox"/> PAY <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

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

0000

0000

Routing Number

Account Number

Account Type

Name (First and Last or Company Name)

Confirm Routing Number

Confirm Account Number

☐ 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.

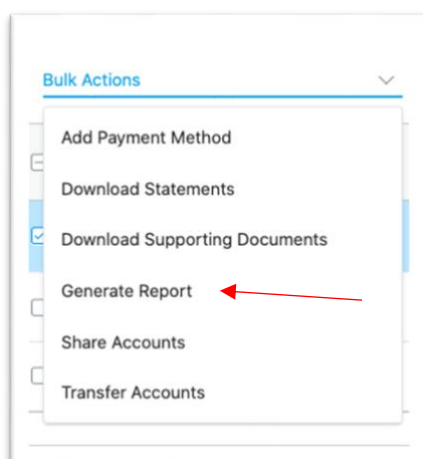
Also, If you would like to turn on AutoPay for those selected accounts, select the second box **Turn on AutoPay for all accounts**. Select **Save** to make changes and a success message will appear.

Bulk 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
000		CHARLOTTE, NC 282246257	\$0.00	08/16/2020	TS
000		GENESEE, NY 14454	\$29,523.34	06/30/2020	NA
000		HARTSDALE, NY 10530	\$3,047.39	06/04/2020	TS



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

- ☐ Select All
- ☐ Statement Id
- ☐ Statement Date
- ☐ Contract Name
- ☐ Customer Name
- ☐ Supplier Account Name
- ☐ Billing Account Number
- ☐ Utility Account Number
- ☐ Billing Address
- ☐ Service Address
- ☐ Transaction Type
- ☐ From Date
- ☐ To Date
- ☐ kWh Usage
- ☐ Previous Balance

Meter Information

- ☐ Select All
- ☐ Statement Date
- ☐ Contract Name
- ☐ Customer Name
- ☐ Supplier Account Name
- ☐ Billing Account Number
- ☐ Utility Account Number
- ☐ Client Id
- ☐ Meter Number
- ☐ Meter Multiplier
- ☐ Beginning Meter Read
- ☐ Start Date
- ☐ End Date
- ☐ Quantity
- ☐ Measurement Unit

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

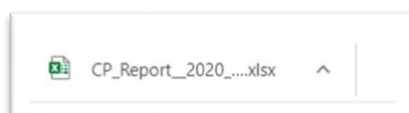
Select the checkboxes next to the items you wish to have in the report.

☒ Save Preferences

Cancel
Generate Report

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

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

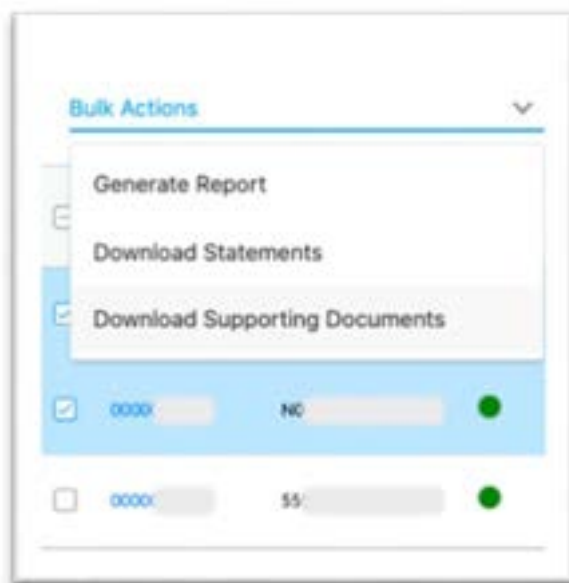


The excel file will have 2 tabs, one for **Billing Info** and one for **Meter Info**.

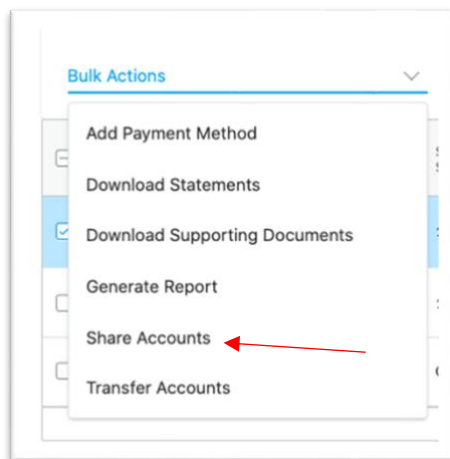
Bulk Download Supporting Documents – Download Supporting Documents for Multiple Accounts

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

	BILLING ACCOUNT	NAME	BILLING ADDRESS	STATEMENT BALANCE	DUE BY	OWNER	
<input checked="" type="checkbox"/>	0000		CHARLOTTE, NC 28234	\$0.00	06/16/2020	TE	PAID
<input checked="" type="checkbox"/>	0000		GENESEO, NY 14454	\$29,533.34	04/25/2020	HA	PAY
<input checked="" type="checkbox"/>	0000		HARTSFIELD, NY 10830	\$3,047.39	04/04/2020	TE	PAY



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**.

The screenshot shows the 'Share Accounts' screen. On the left, there is a list of selected accounts. The main area has two dropdown menus: 'Role' (set to 'Customer') and 'Access Type' (set to 'Sharee'). Below these are 'Cancel' and 'Share' buttons. At the bottom, there is a link to the 'Help Center' for additional assistance.

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**.

BULK ACTIONS	BILLING ACCOUNT	NAME	BILLING ADDRESS	STATEMENT BALANCE	DUE BY	OWNER	
<input type="checkbox"/>	000		CHARLOTTE, NC 28244257	\$0.00	06/14/2020	TS	TSY
<input type="checkbox"/>	000		GENESEO, NY 14454	\$29,533.34	04/30/2020	HA	PAW
<input type="checkbox"/>	000		HARTFORD, CT 06103	\$3,047.39	04/04/2020	TS	PAW

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**.

BILLING ACCOUNT	NAME	BILLING ADDRESS	STATEMENT BALANCE	DUE BY	OWNER
0000		CHARLOTTE, NC 282344257	\$0.00	06/16/2020	TS
0000		GENESEO, NY 14454	\$29,533.34	06/16/2020	HA
0000		HARTFORD, CT 06103	\$3,047.36	06/04/2020	TS

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.