Overview of Products

The Energy Service Provider (ESP) offers competitive pricing for energy commodities and customer services, commonly referred to as a “Product.” These Products are typically customized to meet consumer needs and frequently change to remain competitive. Products for Residential Customers differ from those for Commercial Customers due to volume differences and are influenced by Utility Territories and Markets served, which vary based on Utility Tariffs and Market rules.

Figure 1: Overview illustration

Figure 1: Overview visual

Figure 2: Overview illustration

Figure 2: Overview visual

Figure 3: Overview illustration

Figure 3: Overview visual

Figure 4: Overview illustration

Figure 4: Overview visual

Figure 5: Overview illustration

Figure 5: Overview visual

Figure 6: Overview illustration

Figure 6: Overview visual

Figure 7: Overview illustration

Figure 7: Overview visual

Figure 8: Overview illustration

Figure 8: Overview visual

Components of a Product

At its core, a Product defines the commodity and/or service(s) offered, along with the pricing and calculation methods used for customer billing. This foundational level is known as the **Rate Package** (also referred to as Rate Detail). A Product is further defined by business rules that determine its availability and specific conditions.

Rate Package

A Rate Package consists of charges billed to a customer each month and determines how services are charged. It includes one or more **Rate Details**, which consist of the following components:

- **Rate Description** – Description of the charge used by the ESP to bill a customer. Examples include:
  - Energy Charge
  - Monthly Meter Charge
  - City Taxes
  - County Taxes
  - NSF Charge
  - Late Fee
- **Rate Type** – The calculation method for a given Rate Description. Examples include:
  - Fixed
  - Variable
- **Rate Category** – Organizes multiple Rate Descriptions under a category for display on invoices. Examples include:
  - Energy Charges
  - Utility Pass-through Charges
  - Taxes

  - Miscellaneous Charges

- **Effective Date** – The start date for the rate detail.
- **Expiration Date** – The end date for the rate detail.
- **Rate Amount** – The charge amount of the rate detail.

The assigned Rate Package is visible on the Customer Summary screen in the Billing Information section of the Customer Info tab under the field “Rate Code.”

Business Rules for Products

Products are governed by business rules that determine their availability. Typical business rules include:

- **Business Division** – The business entity of the ESP offering the Product.
- **Customer Type** – Residential or Commercial.
- **Commodity Type** – Gas or Electric.
- **LDC Rate Class** – Customer service class assigned by the utility.
- **Offering Period** – Start and end dates for the product offering.
- **Terms** – Length of the contract.
- **Cancellation Fees** – Charges for early contract termination.
- **Rollover Product** – Product used for billing at the end of the contract period.
- **Special Offers** – Promotional offers.
- **Documents** – Customer documents sent upon enrollment.
- **Commissions** – Sales channel commissions associated with the product.

Importance of Customer Billing

Fundamental to ***ista***|NET is customer billing. For billing to occur, the customer must receive monthly consumption data from the utility and have a current product assigned for that commodity. Proper management of products and their assignment to customers is crucial.

Product Assignment Process

Products are assigned to customers during the enrollment process. Customer renewals and product changes are managed within the Customer Summary screen. Products must be configured in the system prior to assignment. ***ista***|NET offers four options for creating and managing products, ranging from simple to complex:

1. **Client Rate Administration** – A single link for creating a Rate Package.
2. **Rate Administration and Product Administration** – Two links where Rate Admin creates the Rate Package and Product Admin creates the Product.
3. **Client Product Rate Administration** – A single link that combines Rate Package and Product creation.
4. **Rate Package and Product Management** – A single link that combines Rate Packages and Products with more robust features.

Note: Only one of these administration features can be used at a time.

Creating a Rate Package

This process uses one link - the Rate Administration page to create the Rate Package without an associated Product.

1. Click on the ***Client Rate Administration*** link from the Administration Menu Tab. This will take you to the Rate Administration page where you will see two buttons labeled:
    - *New Rate*
    - *Search*
2. Click the *New Rate* button to open a new Rate Package Template. Fill in the following:
    - Description
    - Effective Dates
    - Rate Type – calculation method
3. In Step 2, add Charge Details (Rate Details) by clicking the *Add Detail* button to open the Charge Detail Template. Select the appropriate Charge Category, Charge Description, and Unit of Measure. The Charge Type selected will determine if additional fields are required.
4. In Step 3, review the details. To make changes, click the *Edit* button. When finished, click the *Done* button. If more Charge Details are needed, repeat Step 2. Once all Charge Details are added, click the *Done* button to return to the Rate Administration page.

Creating a Product

This process uses two links - the Rate Administration page to create the Rate Package and the Product Administration page to create the Product.

1. Click on the ***Client Rate Administration*** link from the Administration Menu Tab. This will take you to the Rate Administration page where you will see two buttons labeled:
    - *New Rate*

   - *Search*

2. Click the *New Rate* button to open a new Rate Package Template. Fill in the following:
   - Description
   - Effective Dates
   - Rate Type – calculation method
3. In Step 2, add Charge Details (Rate Details) by clicking the *Add Detail* button to open the Charge Detail Template. Select the appropriate Charge Category, Charge Description, and Unit of Measure. The Charge Type selected will determine if additional fields are required.
4. In Step 3, review the details. To make changes, click the *Edit* button. When finished, click the *Done* button. If more Charge Details are needed, repeat Step 2. Once all Charge Details are added, click the *Done* button to return to the Rate Administration page.
5. To create a new Product, navigate to the Product Administration link and click on the *New Product* button.

Additional Resources

Figure 1: Overview illustration

Figure 1: Overview visual

Figure 2: Overview illustration

Figure 2: Overview visual

Figure 3: Overview illustration

Figure 3: Overview visual

Figure 4: Overview illustration

Figure 4: Overview visual

Figure 5: Overview illustration

Figure 5: Overview visual

Figure 6: Overview illustration

Figure 6: Overview visual

Figure 7: Overview illustration

Figure 7: Overview visual

Figure 8: Overview illustration

Figure 8: Overview visual