

Overview of Energy 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 vary based on Utility Territories and Markets served, influenced by differing 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

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Figure 4: Overview illustration

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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 most basic level, a Product defines the commodity and/or service(s) offered, along with its price and calculation method used for billing. This is referred to as the **Rate Package** (also known as Rate Detail). A Product is further comprised of business rules that determine availability, including:

- To whom the product is available
- Which Utility and Market it serves
- Specific business conditions supporting the product

Rate Package Details

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:

- **Rate Description:** Description of the charge (e.g., Energy Charge, Monthly Meter Charge, City Taxes, etc.)
- **Rate Type:** Calculation method (e.g., Fixed, Variable)
- **Rate Category:** Organizes multiple Rate Descriptions (e.g., Energy Charges, Taxes)
- **Effective Date:** Start date for the rate detail
- **Expiration Date:** End date for the rate detail
- **Rate Amount:** Charge amount of the rate detail

The Customer's assigned Rate Package is visible on the Customer Summary screen in the Billing Information section under "Rate Code."

Business Rules for Products

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

- **Business Division:** 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 Utility
- **Offering Period:** Start and end date for Product Offering
- **Terms:** Length of Contract
- **Cancellation Fees:** Charges for early contract termination
- **Rollover Product:** Product for billing at contract end
- **Special Offers:** Promotional offers
- **Documents:** Customer documents sent upon enrollment
- **Commissions:** Sales channel commissions associated with the product

Customer Billing Process

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 the Customer is crucial.

Products are initially assigned to Customers during the enrollment process. Renewals and product changes are managed within the Customer's account on the Customer Summary screen. Products must be configured in the system prior to assignment.

Administration Options for Products

To streamline the administration of Products, **ista**|NET offers four options for creating and managing Products, ranging from simple to complex:

1. **Client Rate Administration:** One link for creating only a Rate Package.
2. **Rate Administration and Product Administration:** Two links; Rate Admin creates the Rate Package, and Product Admin creates the Product.
3. **Client Product Rate Administration:** One link that combines both features into one page for Rate Package and Product.
4. **Rate Package and Product Management:** One 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 - Rate Administration page creates the Rate Package without an associated Product.

1. Click on the **Client Rate Administration** link from the Administration Menu Tab.
2. On the Rate Administration page, click the *New Rate* button to open a new Rate Package Template.
3. Fill in the following details:
 - Description
 - Effective Dates
 - Rate Type – calculation method
4. 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.

5. In Step 3, review the details. To make changes, click the *Edit* button. When finished, click the *Done* button. Repeat Step 2 if more Charge Details are needed. Click *Done* to return to the Rate Administration page.

Creating a Product

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

1. Click on the ***Client Rate Administration*** link from the Administration Menu Tab.
2. On the Rate Administration page, click the *New Rate* button to open a new Rate Package Template.
3. Fill in the following details:
 - Description
 - Effective Dates
 - Rate Type – calculation method
4. 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.
5. In Step 3, review the details. To make changes, click the *Edit* button. When finished, click the *Done* button. Repeat Step 2 if more Charge Details are needed. Click *Done* to return to the Rate Administration page.
6. To create a new Product, navigate to the Product Administration link and click on the *New Product* button.

Conclusion

Understanding the structure and management of Products and Rate Packages is essential for effective customer billing and service delivery in the energy sector.

Additional Resources

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