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, primarily due to volume differences. Additionally, Products vary based on Utility Territories and Markets served, influenced by differing Utility Tariffs and Market rules.

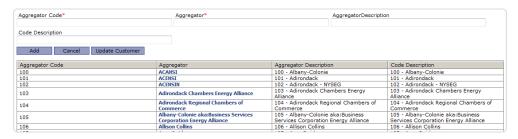


Figure 1: Overview visual

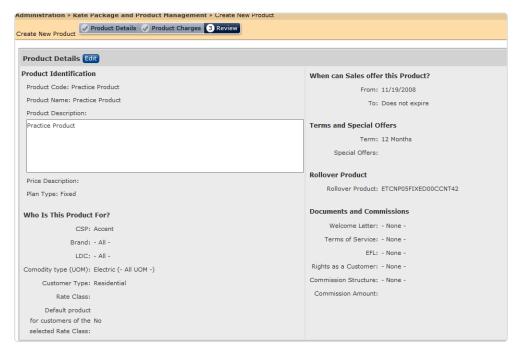


Figure 2: Overview visual

Understanding Energy Service Provider Products

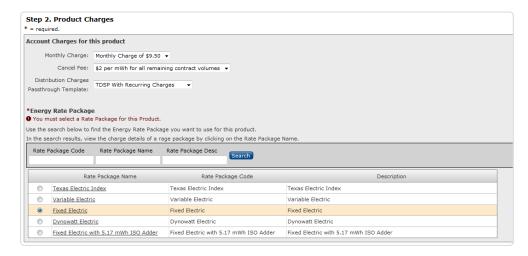


Figure 3: Overview visual

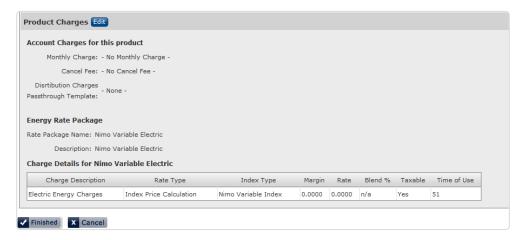


Figure 4: Overview visual

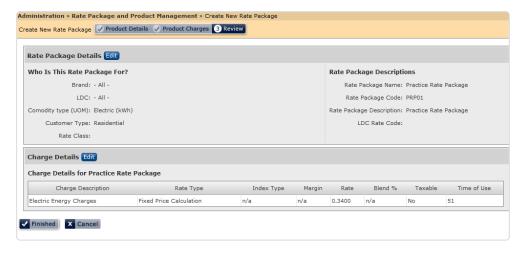


Figure 5: Overview visual

Understanding Energy Service Provider Products

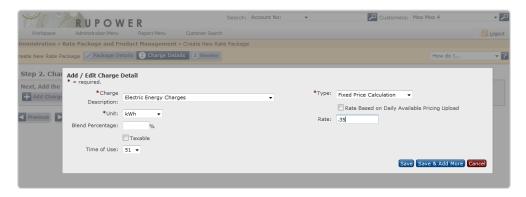


Figure 6: Overview visual

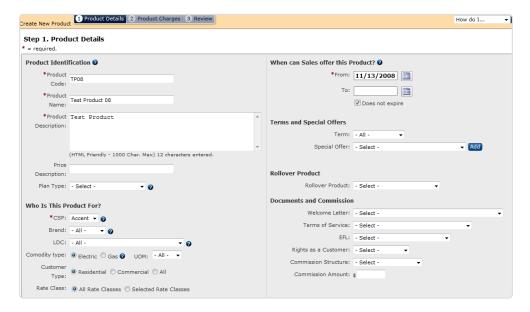


Figure 7: Overview visual

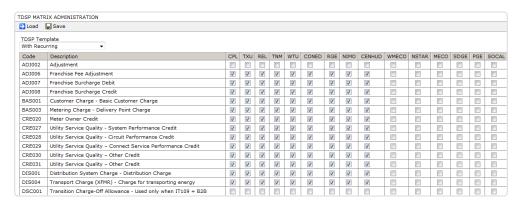


Figure 8: Overview visual

Components of a Product

At its core, a Product defines the commodity and/or service(s) offered, along with its pricing and calculation method. This foundational level is known as the **Rate Package** (also referred to as Rate Detail). A Product is further comprised of business rules that determine its 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, County Taxes, NSF Charge, Late Fee)
- Rate Type: Calculation method for a given Rate Description (e.g., Fixed, Variable)
- Rate Category: Organizes multiple Rate Descriptions under a category for invoice display (e.g., Energy Charges, Utility Passthrough Charges, Taxes, Miscellaneous Charges)
- Effective Date: Begin 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 of the Customer Info tab under the field labeled "Rate Code."

Business Rules for Products

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

- Business Division: 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 Utility
- Offering Period: Begin and end date for Product Offering
- Terms: Length of 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 of a product
- 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.

Initially, Products are assigned to Customers during the enrollment process. Customer 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 of Products

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

- Client Rate Administration: One link where only a Rate Package is created.
- 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.
- Rate Package and Product Management: One link that combines Rate Packages and Products with more robust features.

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

Creating a Rate Package

To create a Rate Package, follow these steps:

- 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. Click on the *Add Detail* button to open the Charge Detail Template. Select the appropriate Charge Category, Charge Description, and Unit of Measure.
- 5. Review the details. To make changes, click on the *Edit* button. When finished, click on the *Done* button.

6. If more Charge Details are needed, repeat the previous step.
When all Charge Details are added, click on the *Done* button to return to the Rate Administration page.

Creating a Product

To create a new Product, follow these steps:

- 1. From the Product Administration link, click on the *New Product* button.
- 2. Follow the prompts to complete the Product creation process.

Conclusion

Understanding the structure and management of Products and Rate Packages is essential for effective customer billing and service delivery within the *ista*|NET system.

Additional Resources

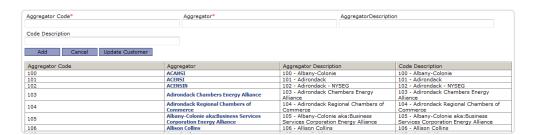


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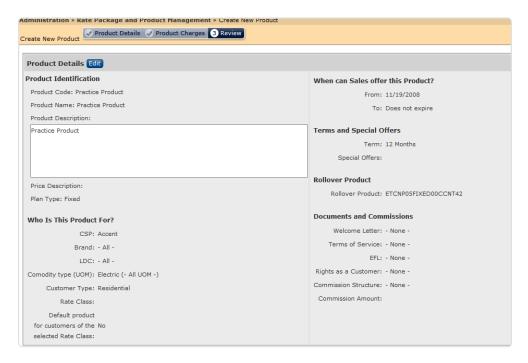


Figure 2: Overview visual

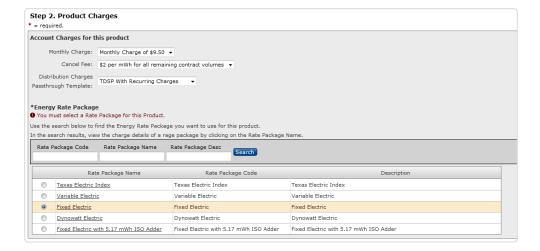


Figure 3: Overview visual

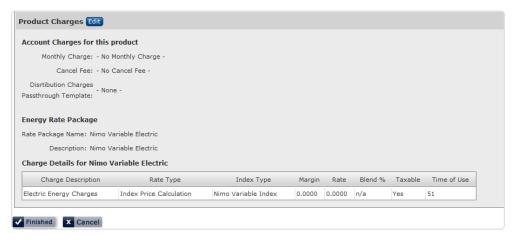


Figure 4: Overview visual

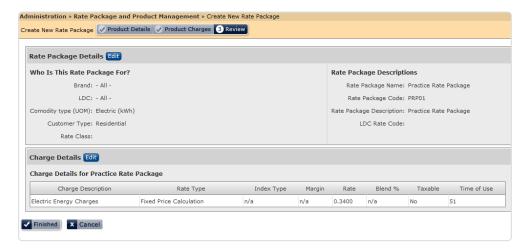


Figure 5: Overview visual

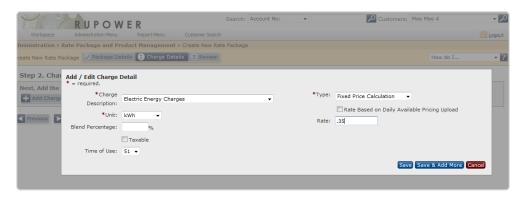


Figure 6: Overview visual

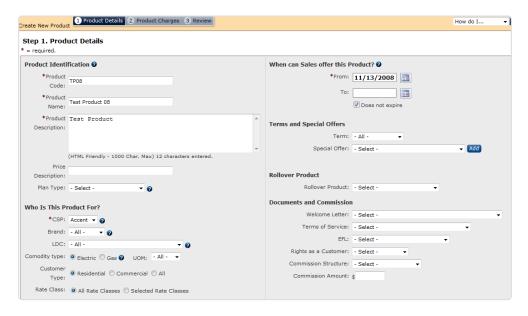


Figure 7: Overview visual

Understanding Energy Service Provider Products

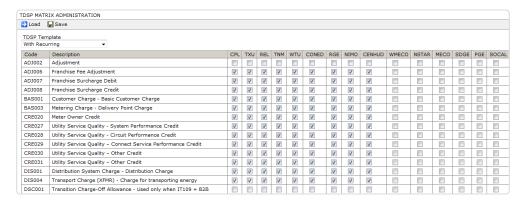


Figure 8: Overview visual