SMART METER
— TEXAS —

Smart Meter Texas

3rd Party Guide

Definitions (1 of 2)

- Registration
  - **REPs with SMT accounts** do not need to re-register. REPs are automatically granted Third Party capabilities.
  - **REPs without SMT accounts** are required to register as REP, not as Third Party entity. Registering as REP would give REP and Third Party capabilities.
  - **All Third Parties** are required to register as Third Party entity.

- Account Authorization Code
  - Only **registered** Customers have Account Authorization Code
  - Where can it be found?
    - Customer logs in to SMT Portal
    - Customer navigates to Account Profile >> My Profile
    - Customer clicks "Manage Account Authorization" button

- Customers with Multiple ESIIDs / Meters
  - Residential and Business Customers with **Multiple ESIIDs / Meters** must add all these in SMT Portal in order for them to be associated to their SMT accounts
  - REPs and Third Parties that invite these customers using **"All ESIIDs"** option will have access to all ESIIDs / Meters that are associated to the Customers' SMT accounts

Definitions (2 of 2)

- Customer Agreement Initiation
  - REPs and Third Parties can initiate Customer Agreement to
    - **Registered** Customers: ESIID and Customer's Account Authorization Code are required
    - **Unregistered** Customers: ESIID and Customer's Email Address are required

- Energy Data Agreement
  - **REPs** continue to have access to usage data of customers that they serve without the need for Energy Data Agreement
  - Provides **REPs** access to usage data of customers that they don't serve
  - Provides **Third Parties** access to usage data of customers that accepted the Energy Data Agreement invitation

- In-Home Device Agreement
  - REPs and Third Parties need to establish In-Home **Device** Agreement with the Customer in order to **add** and **remove** In-Home Devices

- In-Home Device Services Agreement
  - In order to send **messaging** (simple text, load control, pricing) to Customers' In-Home Devices, REPs and Third Parties must establish In-Home Device **Services** Agreement with the Customer

Quick Guide – Navigational Steps

3rd Party Functions	Navigational Steps
How to Register as Third Party	
New Third Party Account Registration *See Navigation Deck - Process P2*	1) Navigate to private.smartmetertexas.com 2) Click "New User Register" button 3) Click **"Create a New 3rd Party Account"** button
Existing Third Party Account - Request access as **Admin**	1) Navigate to private.smartmetertexas.com 2) Click "New User Register" button 3) Click "Request Access to an Existing 3rd Party Account" button 4) Find / Select Business (Existing 3rd Party Account) 5) Click **"Register as an Admin"** button
Existing Third Party Account - Request access as **User**	1) Navigate to private.smartmetertexas.com 2) Click "New User Register" button 3) Click "Request Access to an Existing 3rd Party Account" button 4) Find / Select Business (Existing 3rd Party Account) 5) Click **"Register as a User"** button
How to Initiate Energy Data Agreement	
Initiate Energy Data Agreement *See Navigation Deck - Process P3A*	1) My Account >> Customer Agreements 2) Click Create a new agreement **"Energy Data"** button
Registered Customers	1) Click **Yes** on **"Is customer already registered with SMT"** field 2) Enter **Account Authorization Code** of the registered customer 3) Choose ESIID(s) to be covered by the Agreement 4) Enter ESIID(s) of the registered customer
Un-registered Customers	1) Click **No** on **"Is customer already registered with SMT"** field 2) Enter **Email Address** of the un-registered customer 3) Choose ESIID(s) to be covered by the Agreement - only All ESIID(s) is available 4) Enter one ESIID of the un-registered customer for validation purposes

Quick Guide – Navigational Steps

3rd Party Functions	Navigational Steps
How to Initiate Device and Services Agreements	
Initiate In-Home Device Agreement *See Navigation Deck - Process P5*	1) My Account >> Customer Agreements 2) Click Create a new agreement **"In-Home Device"** button
Initiate In-Home Device Services Agreement *See Navigation Deck - Process P4*	1) My Account >> Customer Agreements 2) Click Create a new agreement **"In-Home Device Services"** button
How to Request Customer Usage Data	
View / Request Customer Usage via My Account tab *See Navigation Deck - Process P9(1)*	1) My Account >> Customer Agreements 2) Select Agreement(s) 3) Click "View/Edit Agreement" button 4) Click "View ESIIDs" 5) Select ESIID 6) Click "View Usage" button
View / Request Customer Usage via Usage tab *See Navigation Deck - Process P10*	1) Usage >> Customer Meters 2) Select Meter 3) Click "View Report" button or "Export Report(s)" button
How to Determine Status of Customer Usage Data	
View Status of Customer Usage Requests	1) Usage >> Report Request Status 2) Check status and details using Order ID
Where are the Usage Data delivered?	
View Customer Usage Data files	1) Check 3rd Party email inbox 2) Check 3rd Party FTP folder
Customer Functions	**Navigational Steps**
Where to find Account Authorization Code (AAC)	
Account Authorization Code (AAC)	1) Account Profile >> My Profile 2) Click "Manage Account Authorization" button

Navigation Deck Instructions

- Due to the amount of content, the Navigation Deck is spread across 2 power-point files and they are marked Part 1 of 2 and Part 2 of 2.
  - **Part 1 of 2**: covers the contents of the 3rd Party Registration process, Main Private Site Navigation (REP as 3rd Party), 3rd Party Initiates and Manages Energy Data Agreement, In-Home Device Agreement and In-Home Device Services Agreement.
  - **Part 2 of 2**: covers the contents of the Main Public Site Navigation (as a Business Customer), Business Customer (Registered or Non-Registered) accepts/rejects and manages an Energy Data Agreement, In-Home Device Agreement and In-Home Device Services Agreement.

- **Instructions** to view this version of the Navigation Deck:
  - Open both PowerPoint files at the same time
  - Run the slide show (F5)
- Tips:
  - **Hand icon**   : navigation is available
  - **Arrow pointer**   : navigation is **not** available