SMART METER
TEXAS

Third-Party Service Provider User Guide

Table of Contents

1   Welcome to Smart Meter Texas

Welcome to Smart Meter Texas! From the Smart Meter Texas (SMT) web portal, you will be able to monitor your Customers' electricity usage by viewing their Smart Meter data. You also have access to your Customers' In-Home Devices.

If your company already has SMT access, then you can request access to your Company's SMT account as a new User or a secondary Administrator. One of your company's existing SMT administrators must approve your access.

A special entry point into the SMT website, private.SmartMeterTexas.com, has been setup for:

- Retail Electric Providers (REP),

- Third-Party Service Providers (Third-Party),

- the Electric Reliability Council of Texas (ERCOT),

- the Public Utility Commission of Texas (PUCT) and

- Transmission and Distribution Service Providers (TDSP).

This private site has pre-registration information that is specific to these parties. Your Customers are instructed to access the SMT website at www.SmartMeterTexas.com. This site contains pre-registration information specific to Customers.

You must go to the special entry point in order to register for a new account. If you have a SMT Account already, you may login from either entry point.

For additional help, contact the SMT Help Desk: (888) 616-5859.

1.1   About this User Guide

1.1.1   SMT Navigation

SMT screens use a standard layout consisting of navigation tabs across the top and a left navigation menu. Throughout this User Guide, you will see references about navigating to a tab or selecting from the left menu. The location of the tabs and left navigation menu are shown in Figure 1.
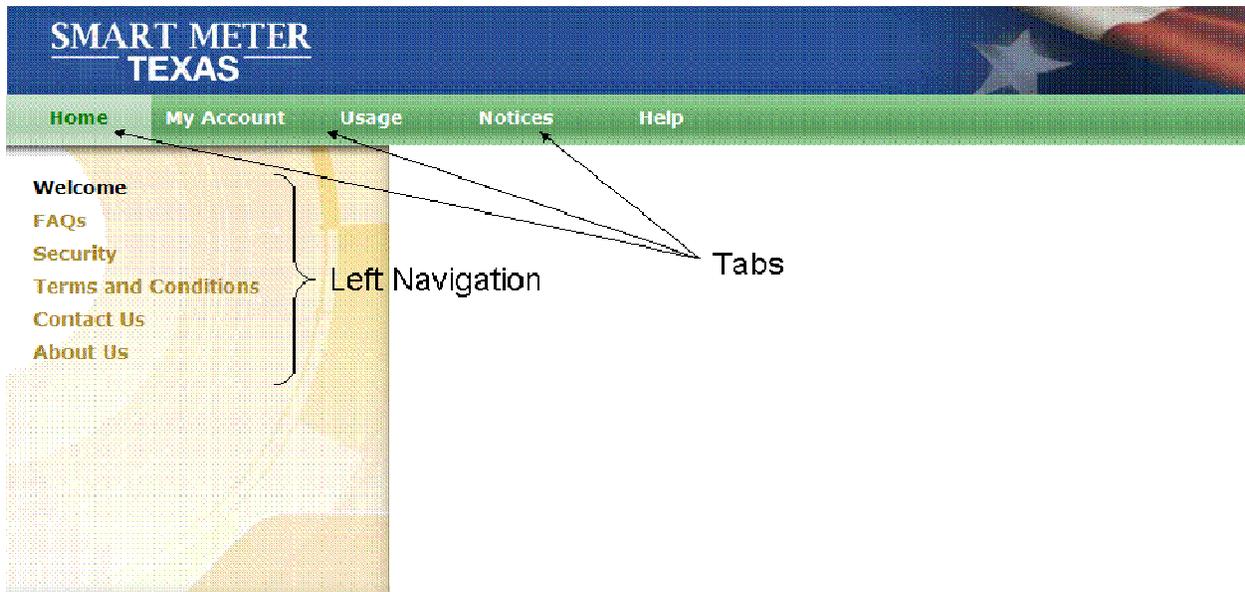
Figure 1: SMT Screen Layout

SMT has a large amount of content organized in hierarchical manner; therefore "breadcrumbs" (or "breadcrumb trail") are utilized as a navigation tool that reveals the user's location within a specific Left Navigation link and can be used to go back to any of the previous screens that were used to arrive to the current location. "Breadcrumbs" are horizontally arranged text links separated by the "slash" symbol (/).

In SMT, breadcrumbs offer a way to trace the path back to previous steps and the original landing point within a Left Navigation link. In SMT, you must use the "breadcrumbs" instead of the browser's "back" button. Example of a breadcrumb is shown in Figure 2.

First part of the breadcrumb indicates the Tab

Middle parts of the Breadcrumb that are "hot" can be selected to navigate back to previous screens

Last part of the Breadcrumb indicates the current location
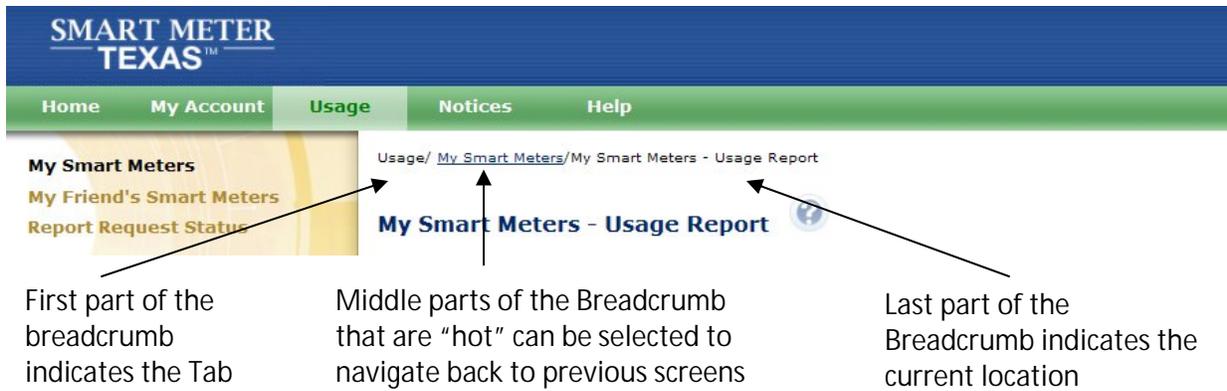
Figure 2: Breadcrumbs

1.1.2   Icons

SMT screens use icons to denote specific kinds of information.

SMT Icon Descriptions	
	Task has completed successfully.
	An error or problem has occurred and the task cannot be completed as requested.
	Warning – this situation could cause a problem in the future.
	Information about a situation is being presented.
	Help entry point. Clicking this icon will display page help for the current page.
	Calendar selection. Clicking this icon will display a calendar that can be used to select a specific date.
	Data is shown sorted in ascending order by this column.
	Data is shown sorted in descending order by this column.
	Special notes contained in this document.

Figure 3: SMT Icon Descriptions

1.1.3   System Requirements

SMT System Requirements	
Browser	Internet Explorer (IE) 6.0 or higher
	Firefox 3.0 or higher
Browser Options	Cookies enabled
	Javascript enabled
Display Resolution	1024 x 768, for optimal screen display

Figure 4: SMT System Requirements

2   Getting Started – Registering for Smart Meter Texas (SMT)

Third-Party companies must have at least one (1) and no more than four (4) administrators. Administrators manage users and control access to your Company's data. If you are the first user registering at SMT for your Company, you will have the Administrator access. SMT will contact you to verify your Company's credentials and your system connectivity for FTP and API access. You will be notified via email when your Company is approved or declined.

Once the Third-Party Company is approved, other Administrators and Users may register for access to your existing Third-Party Company and must be approved by an existing Administrator of your Company. For more information on the capabilities of Administrators and Users, see Section 4.1 Users vs. Administrators.

NOTE: New registrants need to be able to locate your Third-Party Company by company name.

2.1   Creating a New Third-Party Company Account

SMT Procedure – Creating a New Third-Party Company Account	
Step	Action
1	From your browser, go to the SMT website's private entry point for REPs, Third-Party and TDSPs: private.SmartMeterTexas.com
2	Click 'New User Register' button or 'Register Now' link
3	Click 'Create a New 3rd Party Account' link

4	Business Name (required)
	
	    Enter your Company name.
	
	    NOTE: Your company name will be displayed to your Customers when they view the Third-Party Agreements your company has initiated with them. And it will also be printed on all the Third-Party Agreement communications with your Customers.

5	Address 1 (required) Enter the primary address for your Company.
6	Address 2 Enter a second line of address for your Company.
7	City (required) Enter the city for your Company address.

SMT Procedure – Creating a New Third-Party Company Account	
Step	**Action**
8	State (required) Select the state for your Company address from the dropdown box. The default state is TX (Texas).
9	Zip Code (required) Enter the zip code for your Company address.
10	Country (required) Select the country for your Company address from the dropdown box. The default country is United States.
11	Phone (required) Enter the preferred contact phone number for your Company.
12	Email Address (required) Enter the preferred Company email address. NOTE: SMT communication to your Administrators will be sent to this email address. You may want to consider establishing a shared mailbox for these communications. Communications will include SMT notices regarding activity for your Company (e.g., notification that your Administrators have pending Users waiting to be approved).
13	Re-enter Email Address (required) This entry must exactly match the previous entry for Email Address.
14	DUNS Number (required) You must enter a valid DUNS Number in order to complete the Registration process. The DUNS Number is the 9- or 13-digit number issued by Dun & Bradstreet that you use to do business. NOTE: The DUNS Number you provide during the Registration process cannot be changed after your company is approved to access SMT. Contact the SMT Help Desk if you need to change the DUNS Number.
15	Company URL (optional) You may provide the URL of your company's website. NOTE: The URL will be displayed on email communications sent by SMT to your Customers. This link will allow your Customers to go directly to your Company's website.

SMT Procedure – Creating a New Third-Party Company Account	
Step	Action
16	Privacy Policy URL (optional) You may provide the URL of your company's Privacy and Security Policy webpage. 🖍 NOTE: The URL will be displayed on email communications sent by SMT to your Customers. This link will allow your Customers to go directly to the Privacy Policy page of your Company's website.
17	Upload Company Logo (optional) You may provide an image of your company's logo. The image file you want to upload must be less than 20KB. 🖍 NOTE: Your company logo will be displayed on all Agreement-related communications and on the Agreements that the Customer views on SMT.
18	Privacy Seal Requirements (optional) Check this box if your company has met the requirements of the Trusted Smart Grid Privacy Program by TRUSTe and is certified to use the Trusted Smart Grid Privacy Seal. For more information about the TRUSTe certification program, go to www.truste.com. 🖍 NOTE: If you check this box, the Smart Grid Privacy Seal logo will be displayed on all Agreement-related communications and on the Agreements that the Customer views on SMT.
19	Click 'Next' button
20	First Name (required) You will be the first Administrator for your Company. Enter your first name.
21	Middle Initial Enter your middle initial.
22	Last Name (required) Enter your last name.
23	Suffix Enter any name suffix (Jr, Sr, III).
24	Phone Enter your preferred contact phone number.

SMT Procedure – Creating a New Third-Party Company Account	
Step	Action
25	Account Email Address (required) Enter your preferred email address. When registration is complete, your temporary password will be sent to this email address. As an Administrator, you will also receive copies of the email notifications that are sent to the Company Email Address, such as notification of SMT registration requests that are pending approval by an Administrator.
26	Re-enter Email Address (required) This entry must exactly match the previous entry for Email Address.
27	User ID (required) Create a User ID for your Account. User ID must be at least 5 and no more than 100 characters in length and cannot contain slashes (/), single quote marks (') or double quote marks ("). User IDs are not case sensitive.
28	Terms and Conditions (required) You must agree to the stated Terms and Conditions in order to access SMT.
29	Click 'Finish' button If all required fields have been entered successfully, a confirmation will be displayed. An SMT Representative will contact you shortly after the receipt of your new Company Account request to verify your FTP credential and connectivity as part of the approval process. If your company is approved to access SMT, you will receive an email notice that will contain the temporary password for your new Account.

Figure 5: SMT Procedure – Creating a New Third-Party Company Account

2.2   Requesting Access to an Existing Third-Party Company Account

SMT Procedure – Requesting Access to an Existing Third-Party Company Account	
Step	Action
1	From your browser, go to the SMT website's private entry point for REPs, Third-Parties and TDSPs: private.SmartMeterTexas.com
2	Click 'New User Register' button or 'Register Now' link
3	Click 'Request Access to an Existing 3rd Party Account' link

SMT Procedure – Requesting Access to an Existing Third-Party Company Account	
Step	Action
4	Type the Business Name Enter your Third-Party Company Name. You may enter a wildcard search by entering at least two (2) characters and an asterisk (*). The asterisk may be at the beginning, in the middle, or at the end of the string (for example: abc*, a*bc, or *abc). abc* shows all Third-Party Company Names that begin with 'abc' a*bc shows all Third-Party Company Names that begin with 'a' and end with 'bc' *abc shows all Third-Party Company Names that end with 'abc' You can only use one wildcard/asterisk in a given search.
5	Click 'Search' button OR Select a Letter to find the Business in the List Select a letter to display all Third-Party Company names that begin with that letter.
6	Select checkbox (required) Select the Third-Party Company that you wish to access.
7	Click 'Register as an Admin' button or 'Register as a User' button
8	First Name (required) Enter your first name.
9	Middle Initial Enter your middle initial.
10	Last Name (required) Enter your last name.
11	Suffix Enter any name suffix (Jr, Sr, III).
12	Phone Enter your preferred contact phone number.

SMT Procedure – Requesting Access to an Existing Third-Party Company Account	
Step	Action
13	Account Email Address (required) Enter your preferred email address. When registration is complete, your temporary password will be sent to this email address. If you will be an Administrator, you will also receive copies of the email notifications that are sent to the Company Email Address, such as notification of SMT registration requests that are pending approval by an Administrator.
14	Re-enter Email Address (required) This entry must exactly match the previous entry for Email Address.
15	User ID (required) Create a User ID for your Account. User ID must be at least 5 and no more than 100 characters in length and cannot contain slashes (/), single quote marks (') or double quote marks ("). User IDs are not case sensitive.
16	Terms and Conditions (required) You must agree to the stated Terms and Conditions in order to access SMT.
17	Click 'Finish' button You will receive a confirmation screen. An email will be sent to the Administrators of the existing Company notifying them of your request. Your Account must be approved by one of the Administrators for your Third-Party Company before you can access SMT. When you are approved or declined by your company's Administrator, you will receive notification via email. If approved, the email notice will contain the temporary password for your Account.

Figure 6: SMT Procedure – Requesting Access to an Existing Third-Party Company Account

3   Status Values

3.1   Account Status

The status of your SMT account changes when various actions are taken. Figure 7 describes the various Account Status values.

Account Status Values	
Pending	You have successfully completed registration and your Account is pending approval by one of your Company Administrators. If you are the first Administrator and establishing a new Third-Party Company in SMT, then your Account is pending approval by the SMT Team. NOTE: If your Company's Administrator or the SMT Team declines your request or does not approve your request within 14 days, you will be notified by email and your registration request will be deleted. If this occurs, you must re-register.
Approved	You have successfully completed registration and all necessary approvals have been granted. A temporary password for your new Account has been sent to your email address but you have not yet logged in for the first time. NOTE: If you do not login within 14 days after receiving approval, you will be notified by email and your Account will be deleted. If this occurs, you must re-register.
Active	You have successfully logged in for the first time, changed your temporary password, and selected a security question for your Account.
Locked	You have exceeded the number of allowed login attempts with an incorrect password. To reset your Account, a new temporary password must be issued. When your new temporary password is issued, your Account Status will return to Active. See Section 5.3 Forgot Password.
Suspended	Your Account has been suspended by one of your Company Administrators or by the SMT Team. Your Smart Meters will remain associated with your Account. Your Account can only be re-instated by the SMT Team or by your Company Administrators. Once re-instated, your Account Status will return to Active.
Revoked	Your Account has been revoked by one of your Company Administrators or by the SMT Team. This action cannot be undone. To gain access to SMT, you must register for a new Account.

Figure 7: Account Status Values

3.2   Company Status

Your Third-Party Company also carries a status. Your Account Status, your Company Status, and the status of your DUNS number must all be Active for you to gain access to SMT. You cannot view your Company status. If you can login, then your Company status is Active. Figure 8 describes the various Company Status values.

Company Status Values	
Pending	Your Company's first Administrator has successfully registered. The Third-Party Company is currently pending approval by the SMT Team. NOTE: If the SMT Team declines the request or does not approve the request within 14 days, the first Administrator will be notified by email and the registration request will be deleted. If this occurs, the first Administrator must re-register the new Third-Party Company.
Approved	Your Third-Party Company and its first Administrator have been approved by the SMT Team. A temporary password for the first Administrator Account has been sent to the email address provided but the Administrator has not yet logged in for the first time. NOTE: If the first Administrator does not login within 14 days after receiving approval, email notification will be sent and the Third-Party Company and associated first Administrator Account will be deleted. If this occurs, the first Administrator must re-register the new Third-Party Company.
Active	The Third-Party Company's first Administrator has successfully logged in for the first time. NOTE: The Company Status must be Active in order for others to register for user access to your Company's Account.
Suspended	Your Company has been suspended by the SMT Team. When this occurred, an email notification was sent to the email address listed in your Company Profile. Your Company can only be re-instated by the SMT Team. Once re-instated, your Company Status will return to Active.
Revoked	Your Company has been revoked by the SMT Team. Any Third-Party Accounts for Users or Administrators for your Company have also been revoked. This action cannot be undone. To gain access to SMT, you must set up a new Third-Party Company and register for a new Account.

Figure 8: Company Status Values

3.3   DUNS Status

Your DUNS number also carries a status. The status for the DUNS number associated with your Third-Party Company must be Active in order for you to view and access Customer Agreements.

Your Account Status, your Company Status, and the status of your DUNS number must all be Active for you to gain access to SMT.   Figure 9 describes the various DUNS Status values.

DUNS Status Values	
Pending	The DUNS number entered by one of your Company's Administrators is currently awaiting approval by the SMT Team. NOTE: If the SMT Team declines the request or does not approve the request within 14 days, the first Administrator will be notified by email and the registration request will be deleted. If this occurs, the first Administrator must re-register the new Third-Party Company.
Active	The SMT Team has approved the DUNS number.
Suspended	The DUNS has been suspended at the request of the TDSP. An email notification has been sent to the email address listed in your Company Profile. The DUNS can only be re-instated by the SMT Team with TDSP's approval. Once re-instated, the DUNS Status will return to Active.
Revoked	The DUNS has been revoked at the request of the TDSP. All Accounts of the Third-Party using this DUNS number have also been revoked. This action cannot be undone. To gain access to SMT, you must re-register.

Figure 9: DUNS Status Values

4   Managing Accounts for Your Company

If you have a Third-Party Account and are an Administrator for your Company, you are responsible for managing access to your Company data. Managing access includes approving and declining user access requests as well as maintaining access of existing users.

Anyone can request access to your Company Account but approval must be granted by one of the Company Administrators. New registrants will request access as either a User or an Administrator.

For additional information on Account, Company, and DUNS Status values, see Section 3 Status Values.

4.1   Users vs. Administrators

Company Users can:

- Update and view their own personal profile

- View the Company profile

- Initiate, request an extension and terminate Energy Data Agreements (requires Energy Data permission)

- Access usage, meter, and premise information, perform On-Demand Read request for the Smart Meters that are associated with active Energy Data Agreements (requires Energy Data permission)

- Initiate In-Home Device Agreements (requires In-Home Device Services permission)

- Initiate and terminate In-Home Device Services Agreements (requires In-Home Device Services permission)

- View, add, remove and send text messages, pricing signals and load control events to In-Home Devices for the Smart Meters that are associated with active In-Home Device and In-Home Device Services Agreements (requires In-Home Device Services permission).

Company Administrators can:

- Update and view their own personal profile

- Update and view the Company profile

- Approve/decline new registrations requesting access to your Company

- Grant permissions to Company users

- Suspend/re-instate/revoke Accounts that have previously been granted access to your Company

- Initiate, request an extension and terminate Energy Data Agreements

- Access usage, meter, and premise information, perform On-Demand Read request for the Smart Meters that are associated with active Energy Data Agreements

- Initiate In-Home Device Agreements

- Initiate and terminate In-Home Device Services Agreements

- View, add, remove and send text messages, pricing signals and load control events to In-Home Devices for the Smart Meters that are associated with active In-Home Device and In-Home Device Services Agreements.

4.2   Approving and Declining New Account Requests

When a person registers for a Third-Party Account and requests access to your Company, that request must be approved or declined by one of the Company Administrators. Email notification is sent to the email address in the Company Profile whenever a registration request occurs.

NOTE: If a Company Administrator does not take action on a pending registration request within 14 days, the requestor will be notified by email and the registration request will be deleted. If this occurs, the requestor must re-register.

SMT Procedure – Approving and Declining New Account Requests	
Step	Action
1	Navigate to the 'My Account' tab
2	Select 'Pending Approval' from the left menu
3	Select checkbox (required) Select the checkbox next to one or more Accounts. Edit Permissions is only available for one Account at a time. Approve and Decline will function for multiple Accounts at the same time.
4	Click 'Edit Permissions' button, 'Approve' button, or 'Decline' button Edit Permissions will display the Account Profile information for the Pending Account. You will be able to approve or decline this Account from the Edit Permissions screen. Go to Step 5. Approve will approve all selected Accounts without viewing the Account owner's details. The selected Accounts will have read-only access to all Customer Agreements of the Company. NOTE: If you wish to include comments that will be sent to the Account owner upon approval or to grant Agreement permissions to the new user, you must approve the Account through the Edit Permissions screen. Decline will require you to enter comments to be sent to the registrant about why the request is being declined. Go to Step 10.

SMT Procedure – Approving and Declining New Account Requests	
Step	Action
5	**From Step 4 / Edit Permissions** Access to Energy Data (optional) Select this checkbox if you wish to grant this user access to: - Create new Energy Data Agreements - Manage existing Energy Data Agreements - Access energy data reports and meter/premise data All administrators have access to all functions related to Energy Data Agreements automatically. You can only use this checkbox to grant access to users. NOTE: If you approve a user without Editing Permissions (see Step 4), the user will have read-only access to all your Energy Data Agreements. However, you may edit the user's permission later through the option 'Manage Users' (for more information see Section 4.4 Altering Account Status for Existing Accounts).
6	Access to In-Home Device Services (optional) Select this checkbox if you wish to grant this user access to: - Create In-Home Device and In-Home Device Services Agreements - Manage existing In-Home Device and In-Home Device Services Agreements - Add and Remove In-Home Devices to your Customer's Smart Meters All administrators have access to all functions related to In-Home Device and In-Home Device Services Agreements automatically. You can only use this checkbox to grant access to users. NOTE: If you approve a user without Editing Permissions (see Step 4), the user will have read-only access to the In-Home Device and In-Home Device Services Agreements, but will not have access to Add and Remove In-Home Devices. However, you may edit the user's permissions later through the option 'Manage Users' (for more information see Section 4.4 Altering Account Status for Existing Accounts).
7	Web Portal Access (required) Select 'Approve' or 'Decline' from the dropdown box.
8	Comments (required if the Account is being declined) The Account owner will be notified via email when the Account is approved or declined. Any comments entered here are included in that email. If the Account is being approved, the comments are optional.

SMT Procedure – Approving and Declining New Account Requests	
Step	Action
9	Click 'Save Account' button If the Account is approved, the Account Status will change to 'Approved' and an email notification will be sent to the Account owner along with a temporary password. If the Account is declined, the Account will be deleted and an email notification will be sent to the Account owner. Either way, the Pending Request is removed from the Administrator's pending work queue. 🖍 NOTE: The Company Administrators share the Administrator's pending work queue. If any one (1) Administrator approves or declines a registration request, the request is removed from the Administrator's pending work queue for all Company Administrators.
10	From Step 4 / Decline Comments (required) The Account owner will be notified via email when the Account is declined. Comments entered here are included in that email and are meant to give the Account owner a reason why the request was declined.
11	Click 'Decline' button All Accounts selected on the pending work queue will be deleted. An email notification will be sent to each of the Account owners. The Pending Request is removed from the Administrator's pending work queue.

Figure 10: SMT Procedure – Approving and Declining New Account Requests

4.3   Displaying Your Company's Account List

If you are a Company Administrator, your Company's Account List contains all of the Accounts that are associated with your Company. Figure 11 shows an example of an Account list when displayed in SMT.

	User ID	First Name	Last Name ▼	Email	Type	Account Status
☐	jdoe	Jane	Doe	jdoe@company.com	User	Active
☐	ssmith	Steve	Smith	ssmith@company.com	User	Active

Figure 11: Account List

If you have 25 or fewer Accounts associated with your Company, your Account List will automatically display. If you have more than 25 Accounts, you will need to search for Accounts to display in your list.

SMT Procedure – Displaying Your Account List (25 or fewer Accounts)	
Step	Action
1	Navigate to the 'My Account' tab
2	Select 'Manage Users' from the left menu

Figure 12: SMT Procedure – Displaying Your Account List (25 or fewer Accounts)

If you have 25 or more Accounts associated with your Company, you will see a Search screen. You must search for a specific Account or a group of Accounts to populate the search results with an Account List. You may also click the link 'Show All' to display all Accounts associated with your Company.

NOTE: If you have more than 500 Accounts associated with your Company, the 'Show All' link will not appear. In this case, you must search for a specific Account or group of Accounts.

SMT Procedure – Displaying Your Account List (Show All)	
Step	Action
1	Navigate to the 'My Account' tab
2	Select 'Manage Users' from the left menu
3	Click 'Show All' link

Figure 13: SMT Procedure – Displaying Your Account List (Show All)

SMT Procedure – Displaying Your Account List (Search for Accounts)	
Step	Action
1	Navigate to the 'My Account' tab
2	Select 'Manage Users' from the left menu
	Enter search criteria in one (1) or more of the following fields. In each search field, you may enter a wildcard search by entering at least two (2) characters and an asterisk (*). The asterisk may be at the beginning, in the middle, or at the end of the string (for example: abc*, a*bc, or *abc).
	abc* shows all entries that begin with 'abc'
	a*bc shows all entries that begin with 'a' and end with 'bc'
	*abc shows all entries that end with 'abc'
	You can only use one wildcard/asterisk in a given search field.
3	First Name
	Enter the First Name on the Account to be located.

SMT Procedure – Displaying Your Account List (Search for Accounts)	
Step	Action
4	Last Name Enter the Last Name on the Account to be located.
5	Email Address Enter the Email Address on the Account to be located.
6	User ID Enter the User ID on the Account to be located.
7	DUNS Number Check the box next to the DUNS Number to narrow your search to only Accounts that have access to this DUNS.
8	Account Status Select an Account Status from the dropdown list. Your search results will include only Accounts with the selected status. For more information on Account Status values, see Section 3.1 Account Status.
9	Click 'Search' button OR Select a Letter to find the user's last name in the list Select a letter to display all Accounts with Last Names that begin with that letter.

Figure 14: SMT Procedure – Displaying Your Account List (Search for Accounts)

4.4   Altering Account Status for Existing Accounts

Company Administrators can alter the Account Status for any User or Administrator Account that is associated with the Company. For more information on Account Status values, see Section 3 Status Values.

SMT Procedure – Altering Account Status for Existing Accounts	
Step	Action
	🖊 NOTE: You must have an Account List displayed before you can complete these steps. For information on displaying your Account List, see Section 4.3 Displaying Your Company's Account List.
1	Select checkbox (required) Select the checkbox next to one or more Accounts. Edit User is only available for one Account at a time. Suspend, Reinstate, and Revoke is available for multiple Accounts at the same time.

SMT Procedure – Altering Account Status for Existing Accounts	
Step	**Action**
2	Click 'Edit User' button, 'Suspend' button, 'Reinstate' button, or 'Revoke' button
	Edit User will display the Account Profile information for the selected Account. You will be able to change the status of the Account from the Edit User screen. Go to Step 3.
	Suspend will require you to enter comments to be sent to the Account owner about why he is being suspended.
	![pencil icon] NOTE: You cannot suspend an Account that is already Suspended or Revoked.
	Go to Step 8.
	Reinstate will change the Account Status of selected Accounts to 'Active'.
	![pencil icon] NOTE: Account Status must be Suspended in order to be reinstated.
	![pencil icon] NOTE: If you wish to include comments that will be sent to the Account owner upon being reinstated, then you must alter the Account Status through the Edit User screen.
	Revoke will require you to enter comments to be sent to the Account owner about why he is being revoked.
	![pencil icon] NOTE: Revoking an Account is permanent and cannot be undone.
	Go to Step 8.
3	From Step 2 / Edit User
	Access to Energy Data (optional)
	Select this checkbox if you wish to grant this user access to:
	▪ Create new Energy Data Agreements
	▪ Manage existing Energy Data Agreements
	▪ Access energy data reports and meter/premise data

SMT Procedure – Altering Account Status for Existing Accounts	
Step	Action
4	Access to In-Home Device Services (optional)
	Select this checkbox if you wish to grant this user access to:
	▪ Create In-Home Device and In-Home Device Services Agreements
	▪ Manage existing In-Home Device and In-Home Device Services Agreements
	▪ Add and Remove In-Home Devices to your Customer's Smart Meters
5	Web Portal Access (required)
	Select the access from the dropdown box.
	✎ NOTE: The dropdown box values will differ depending on the Account's current status. For example, Reinstate will not be shown as an option unless the current Account Status is Suspended.
6	Comments (required if the Account is being suspended or revoked)
	The Account owner will be notified via email when the Account Status is changed. Any comments entered here are included in that email.
7	Click 'Save Account' button
8	From Step 2 / Suspend or Revoke
	Comments (required)
	The Account owner will be notified via email when the Account Status is changed. Comments entered here are included in that email and are meant to give the Account owner a reason why the action was taken.
9	Click 'Suspend' button or 'Revoke' button
	✎ NOTE: Only one of these buttons will show on your screen.
	All Accounts selected on the Account list will be suspended or revoked. An email notification will be sent to each of the Account owners.

Figure 15: SMT Procedure – Changing Account Status for Existing Accounts

4.5   Changing the Company Profile

Administrators may change the Company Profile information. Users may view but not change the Company Profile.

SMT Procedure – Changing the Company Profile	
Step	Action
1	Navigate to the 'My Account' tab
2	Select 'Company Profile' from the left menu
3	Click 'Edit Profile' button
4	Company Name (required) Change your Company Name.
5	Address 1 (required) Change the primary address for your Company.
6	Address 2 Change the second line of the address for your Company.
7	City (required) Change the city for your Company address.
8	State (required) Select a new state for your Company address from the dropdown box.
9	Zip Code (required) Change the zip code for your Company address.
10	Country (required) Select a new country for your Company address from the dropdown box.
11	Phone (required) Change the preferred contact phone number for your Company.
12	Account Email Address (required) Change the preferred Company email address. NOTE: SMT communication to your Administrators will be sent to this email address. You may want to consider establishing a shared mailbox for these communications. Communications will include SMT notices regarding activity for your Company (e.g., notification that your Administrators have pending Users waiting to be approved).
13	Re-enter Email Address (required if Account Email Address is changed) This entry must exactly match the previous entry for Account Email Address.

SMT Procedure – Changing the Company Profile	
Step	Action
14	DUNS 📝 NOTE: The DUNS Number you provided during the Registration process cannot be changed after your company is approved to access SMT. Contact the SMT Help Desk if you need to change the DUNS Number.
15	Company URL (optional) You may provide the URL of your company's website or change the one you provided before. 📝 NOTE: The URL will be displayed on email communications sent by SMT to your Customers. This link will allow your Customers to go directly to your website.
16	Privacy Policy URL (optional) You may provide the URL of your company's Privacy and Security Policy webpage or change the one you provided before. 📝 NOTE: The URL will be displayed on email communications sent by SMT to your Customers. This link will allow your Customers to go directly to your website.
17	Upload Company Logo (optional) You may provide an image of your company's logo or change the one you provided before. The image file you want to upload must be less than 20KB. 📝 NOTE: Your company logo will be displayed on all Agreement-related communications and on the Agreements that the Customer views on SMT.
18	Privacy Seal Requirements (optional) Check this box if your company has met the requirements of the Trusted Smart Grid Privacy Program by TRUSTe and is certified to use the Trusted Smart Grid Privacy Seal. For more information about the TRUSTe certification program, go to www.truste.com. 📝 NOTE: If you check this box, the Smart Grid Privacy Seal logo will be displayed on all Agreement-related communications and on the Agreements that the Customer views on SMT.
19	Click 'Save Profile' button

Figure 16: SMT Procedure – Changing the Company Profile

5   Managing Your Personal Account

The personal information that you entered when you registered is stored in your profile. Your Company Administrators can change the Status of your Account and grant and remove access to Energy Data and In-Home Device Services functions, but only you can alter your personal profile information.

For more information on Account Status, Section 3.1 Account Status..

You also have the ability to unlock your own Account and to recover forgotten User IDs or Passwords.

5.1   Changing Your Password

SMT Procedure – Changing Your Password	
Step	Action
1	Navigate to the 'My Account' tab
2	Select 'My Profile' from the left menu
3	Click 'Change Password' button
4	Current Password (required) Enter your current password.
5	New Password (required) Enter your new password. Your password must be between 6 and 24 characters. The field is case sensitive and cannot be the same as your User ID. Your new password cannot be the same as your previous password.
6	Re-enter New Password (required) This entry must exactly match the previous entry for New Password.
7	Click 'Save Password' button

Figure 17: SMT Procedure – Changing Your Password

5.2   Changing Your Personal Profile

NOTE: You cannot change your User ID. If you need a different User ID then you will have to register for a new Account.

SMT Procedure – Changing Your Personal Profile	
Step	Action
1	Navigate to the 'My Account' tab

SMT Procedure – Changing Your Personal Profile	
Step	Action
2	Select 'My Profile' from the left menu
3	Click 'Edit Profile' button
4	First Name (required) Change your first name.
5	Middle Initial Change your middle initial.
6	Last Name (required) Change your last name.
7	Suffix Change any name suffix (Jr, Sr, III).
8	Phone Change your preferred contact phone number.
9	Email Address (required) Change your preferred email address.
10	Re-enter Email Address (required if Email Address is changed) This entry must exactly match the previous entry for Email Address.
11	Access to Energy Data This field shows whether you have access to Energy Data functions. Your Company's Administrator can grant you access or remove your access to Energy Data functions.
12	Access to In-Home Device Services This field shows whether you have access to In-Home Device Services functions. Your Company's Administrator can grant you access or remove your access to In-Home Device Services functions.
13	Click 'Change Password' button, 'Change Security' button or 'Save Profile' button Change Password will display a new screen that will allow you to change your password. Go to Step 14. Change Security will display a new screen that will allow you to change your Security Question and Answer. Go to Step 18. Save Profile will save all changes that you have made to your Account Profile

SMT Procedure – Changing Your Personal Profile	
Step	Action
14	From Step 13 / Change Password Current Password (required) Enter your current password.
15	New Password (required) Enter your new password. Your password must be between 6 and 24 characters. The field is case sensitive and cannot be the same as your User ID.
16	Re-enter New Password (required) This entry must exactly match the previous entry for New Password.
17	Click 'Save Password' button Your password is changed and you are returned to the Edit Profile screen. Return to Step 13.
18	From Step 13 / Change Security Security Question (required) Select a Security Question from the dropdown box.
19	Security Question Answer (required) Enter an Answer for the Security Question that you can remember. The Answer is not case sensitive. In the future, if you forget your password, you will be asked for the Answer to your Security Question.
20	Click 'Save Question' button Your security information is changed and you are returned to the Edit Profile screen. Return to Step 13.

Figure 18: SMT Procedure – Changing Your Personal Profile

5.3   Forgot Password / Unlocking Your Account

If you forget your password, you can request that a new temporary password be generated for your Account.

If you attempt to login with an incorrect password more than 4 times, your Account Status will be set to 'Locked'. You can also use the Forgot Password procedure to unlock your Account and reset your password. For more information on Account Status, see Section 3.1 Account Status.

SMT Procedure – Forgot Password / Unlocking Your Account	
Step	Action
1	From your browser, go to the SMT website www.SmartMeterTexas.com or private.SmartMeterTexas.com
2	User ID (required) Enter your User ID in the Login area.
3	Click 'Forgot Password' link Your Security Question from your Account Profile will be displayed.
4	Answer (required) Enter the answer to the displayed security question. The answer must match the Security Question Answer from your Account Profile.
5	Click 'Submit' button If the answer to your security question is correct, a new temporary password will be generated and sent to the Email Address that is contained in your Account Profile. If your Account was locked, then your Account Status will be set to 'Active'. NOTE: If you no longer have access to the Email Address that is listed in your Account Profile and you cannot retrieve your new temporary password, then you must register for a new Account.

Figure 19: SMT Procedure – Forgot Password / Unlocking Your Account

5.4   Forgot User ID

If you forget your User ID, you can request that it be sent to the Email Address in your Account Profile.

SMT Procedure – Forgot User ID	
Step	Action
1	From your browser, go to the SMT website www.SmartMeterTexas.com or private.SmartMeterTexas.com
2	Click 'Forgot User ID' link
3	Email Address (required) Enter the Email Address that is stored in your Account Profile.

SMT Procedure – Forgot User ID	
Step	Action
4	Click 'Submit' button If an Account is found that matches the Email Address entered, then an email containing the User ID will be sent to that Email Address. If multiple Accounts are found, then the email notification will list all User IDs associated with that email address. NOTE: If you no longer have access to the Email Address that is listed in your Account Profile and you cannot retrieve your forgotten User ID, then you must register for a new Account.

Figure 20: SMT Procedure – Forgot User ID

6   Managing Customer Agreements

A Customer Agreement allows Third-Party Service Providers to access the Customer's usage data or In-Home Devices.

SMT supports three (3) types of Customer Agreements:

- Energy Data Agreement

- In-Home Device Agreement

- In-Home Device Services Agreement

6.1   Displaying Your Customer Agreement List – My Account

Your Customer Agreement List contains all the active and pending Customer Agreements that are associated with your associated with your Account. In-active Customer Agreements will only be viewable on this list for up to 30 calendar days. 30 calendar days.

	Agreement Type	Customer Agreement#	Start Date	End Date	Customer Last Name	Status
☐	In-Home Device	1421	N/A	N/A		Rejected
☐	Energy Data - Flex	973	N/A	N/A		Rejected
☐	Energy Data - Fixed	1148	N/A	N/A	Jain	Pending

Figure 21 shows an example of a Customer Agreement List when displayed in SMT.

	Agreement Type	Customer Agreement#	Start Date	End Date	Customer Last Name	Status
☐	In-Home Device	1421	N/A	N/A		Rejected
☐	Energy Data - Flex	973	N/A	N/A		Rejected
☐	Energy Data - Fixed	1148	N/A	N/A	Jain	Pending

Figure 21: Customer Agreement List – My Account

If you have 25 or fewer Customer Agreements associated with your Account, your Agreement List will automatically display. If you have more than 25 Customer Agreements, you will need to search for Agreements to display in your list.

SMT Procedure – Displaying Customer Agreement List (25 or fewer Smart Meters) – My Account	
Step	Action
1	Navigate to the 'My Account' tab
2	Select 'Customer Agreements' or 'Customer Agreements (3rd Party)' from the left menu

🖉 NOTE: If you are a Retail Electric Provider (REP), select 'Customer Agreements (3rd Party)' on the left menu. |

Figure 22: SMT Procedure – Displaying Customer Agreement List (25 or fewer Customer Agreements) – My Account

6.1.1   Searching for Agreements – My Account

If you have more than 25 Customer Agreements associated with your Account, you will see a Search screen. You must search for a specific Customer Agreement or a group of Customer Agreements to populate the search results with a Customer Agreements List.

A search can be performed on up to 100 items. You can choose one of the following search criteria:

- Customer Agreement Number

- Customer Last Name / Business Name

- ESI IDs

- In-Home Device MAC Address

If you have less than 500 Customer Agreements, click the link 'Show All' to display the Customer Agreements associated with your Account.

NOTE: If you have more than 500 Customer Agreements associated with your Account, the 'Show All' link will not appear. In this case, you must search for a specific Agreement or group of Agreements.

SMT Procedure – Displaying Customer Agreements List (Show All) – My Account	
Step	Action
1	Navigate to the 'My Account' tab
2	Select 'Customer Agreements' or 'Customer Agreements (3rd Party)' from the left menu
3	Click 'Show All' link

Figure 23: SMT Procedure – Displaying Customer Agreements List (Show All) – My Account

SMT Procedure – Displaying Customer Agreements List (Search for Agreements) – My Account	
Step	Action
1	Navigate to the 'My Account' tab
2	Select 'Customer Agreements' or 'Customer Agreements (3rd Party)' from the left menu
3	Select type of Customer Agreement identifier (required) Select to search by either Customer Agreement Number, Customer Last Name / Business Name, ESI ID or In-Home Device MAC Address

SMT Procedure – Displaying Customer Agreements List (Search for Agreements) – My Account	
Step	Action
4	Type one or more search items (required)
	Enter up to 100 Customer Agreement Number, Customer Last Name / Business Name, ESI IDs or In-Home Device MAC Address to correspond with your search type. All the search values must be the same search type, and should be separated by a comma (,).
	You may enter a wildcard search by entering at least two (2) characters and an asterisk (*). The asterisk may be at the beginning, in the middle, or at the end of the string (for example: abc*, a*bc, or *abc).
	abc* shows all entries that begin with 'abc'
	a*bc shows all entries that begin with 'a' and end with 'bc'
	*abc shows all entries that end with 'abc'
	You can only use one wildcard/asterisk in a given search. If you use a wildcard, you may not enter other search values.
5	Click 'Search' button

Figure 24: SMT Procedure – Displaying Customer Agreement List (Search for Agreements) – My Account

6.2   Create New Customer Agreements

To establish an Agreement with your Customer, you need to obtain an Account Authorization Code from your Customer if they have a SMT account already. If your Customer does not have a SMT account, you need to provide their email address and ESI ID to start the process.

6.2.1   Energy Data Agreement

An Energy Data Agreement allows a Third-Party Service Provider to view the energy usage, meter and premise information and perform On-Demand Read requests.

If you are a Retail Electric Provider (REP) and the Customer's current REP of Record (ROR), you are not required to establish an Energy Data Agreement. If you are not the Customer's current ROR, you will need to have an active Energy Data Agreement.

If you are an Independent Third-Party Service Provider, you need to have an active Energy Data Agreement.

NOTE: Only Company Administrators or Authorized Users with the Energy Data permission are allowed to create new Energy Data Agreements.

SMT Procedure – Creating a New Energy Data Agreement	
Step	Action
1	Navigate to the 'My Account' tab
2	Select 'Customer Agreements' or 'Customer Agreements (3rd Party)' from the left menu
3	Click 'Energy Data' button under the Create A New Agreement section

Figure 25: SMT Procedure – Creating a New Energy Data Agreement

There are two (2) types of Energy Data Agreements.

- Fixed ESI IDs - Energy Data Agreement with a list of specific ESI IDs only

    o This type of Energy Data Agreement is only available for Customers who have registered with SMT already.

    o You have to provide a list of ESI IDs when you initiate a new Energy Data Agreement. You may provide up to one hundred (100) ESI IDs.

    o Once the Agreement Invitation is submitted, you cannot make any change to the list of the ESI IDs in the Agreement.

    o If your Customer removes an ESI ID from their SMT account after the Agreement is accepted, the ESI ID will be removed from your Energy Data Agreement.

    o If all the ESI IDs are removed from the Customer's SMT account, your Energy Data Agreement will be terminated automatically.

    o If there is at least one (1) ESI ID in the Energy Data Agreement, you or your Customer may terminate the Agreement at any time before the Agreement expires.

    o This type of Energy Data Agreement works best when you only need to access up to one hundred (100) ESI IDs and do not anticipate adding new ESI IDs to the Agreement later.

- Flexible ESI IDs - Energy Data Agreement with all ESI IDs under the Customer's SMT account

    o This type of Energy Data Agreement is available for all customers whether they have registered with SMT or not.

    o You will need to provide one (1) ESI ID during the initiation of the Agreement. All the ESI IDs in your Customer's SMT account will automatically be added to this Energy Data Agreement.

    o Once the Agreement Invitation is submitted, you cannot make any changes to the list of ESI IDs in the Agreement. However, when your Customer adds or removes an ESI ID to their SMT account, the ESI ID will be added or removed from your Agreement automatically.

    o You or your Customer may terminate the Agreement at any time before the Agreement expires.

    o If there is no ESI ID in your Customer's SMT account, this Energy Data Agreement will remain in Active status until one of the following occurs:

- ▪ Your Customer terminates the Agreement

- ▪ You terminate the Agreement

- ▪ The Agreement expires based on the Agreement duration.

o If there is no ESI ID in your Customer's account, you will not be allowed to request an extension of the Agreement.

o This type of Energy Data Agreement works best if your Customer has more than one hundred (100) ESI IDs that you want to access or you anticipate the Customer adding new ESI IDs to their SMT account in the future.

An Energy Data Agreement can be established for up to twelve (12) months in duration. If the initial Energy Data Agreement is less than twelve (12) months and you want to extend it to the maximum duration, refer to Section 6.3.3 to learn how to request an extension of an Energy Data Agreement.

Once an Energy Data Agreement is established, you will have access to the following data:

- ▪ Meter and Premise Information

- ▪ Daily Usage (15 minute intervals), Daily Meter Reads and Monthly usage reports online, request On-Demand Reads, and export usage to CSV file and Green Button (XML) format.

Refer to Section 7 to learn how to access your Customer's Meter and Premise information, and Section 8 for accessing your Customer's usage data, request On-Demand Reads and export reports.

SMT Procedure – Completing an Energy Data Agreement Invitation	
Step	Action
1	Is Customer registered with SMT? (required) Select 'Yes' if your Customer has a registered account with SMT. NOTE: Different information will be required to complete the new Agreement form depending on the SMT registration status of your Customer.
2	Is Customer Residential or Business? (required) Select the type of your Customer. NOTE: Different information will be required to complete the new Agreement form depending on the type of your Customer.

SMT Procedure – Completing an Energy Data Agreement Invitation	
Step	**Action**
3	Account Authorization Code (required if Customer is registered with SMT) Enter your Customer's Account Authorization Code. 🖊 NOTE: Every SMT Customer has a unique Account Authorization Code. If your Customer is a Business, each of its Company Administrators will have their own Account Authorization Code. Verify the Customer information populated on the form to make sure that you are initiating the Agreement with the correct Customer.
4	Email Address (required if Customer is NOT registered with SMT) Enter your Customer's email address.

5	First Name / Business Name, Last Name
	
	If your Customer has a SMT account already, these fields will be pre-populated.
	
	If your Customer does not have a SMT account:
	
	   ▪ For Residential Customer, enter their First Name and Last Name.
	
	   ▪ For Business Customer, enter the Business Name only.
	
	🖊 NOTE: When your Customer receives the Agreement Invitation email and registers with SMT, they may choose to provide a different name for their new SMT account.

6	Phone Number If your Customer has a SMT account already, this field will be pre-populated. If your Customer does not have a SMT account, enter their contact phone number. 🖊 NOTE: When your Customer receives the Agreement Invitation email and registers with SMT, they may choose to provide a different contact phone number for their new SMT account.
7	Language Preference If your Customer is a Residential Customer, you may select the language preference (English or Spanish). 🖊 NOTE: When your Customer receives the Agreement Invitation and registers with SMT, they may choose to select a different language preference for their new SMT account.
8	3rd Party Company Name Your Company name is pre-populated here.

SMT Procedure – Completing an Energy Data Agreement Invitation	
Step	Action
9	3rd Party Email, 3rd Party Phone Number, 3rd Party Contact (required) Your email address, phone number and name are pre-populated based on your profile but can be overridden with new information. NOTE: Your account profile will not be updated with the new contact information you provide for this Agreement Invitation.
10	Agreement Duration (required) Select the duration of the Agreement.
11	ESIID to be covered by Agreement (required) To create a Flexible ESI IDs Energy Data Agreement, choose the option 'All ESI IDs in Account'. Go to Step 12. To create a Fixed ESI IDs Energy Data Agreement, choose the option 'Only Specified'. Go to Step 13. NOTE: If your Customer is not registered with SMT, you must select the option 'All ESI ID in Account'.
12	From Step 11 ESIID(s) – Enter one ESIID (for Validation Only) Enter your Customer's ESI ID. If your Customer has multiple ESI IDs, you may enter any one of their ESI IDs. SMT will validate the ESI ID with the Account Authorization Code or the Customer's email address you provide. Go to Step 15. NOTE: This field is disabled if you select the option 'Only Specified' in previous step.
13	From Step 11 ESIID(s) – Enter one or more ESIIDs (separated by commas) Enter up to one hundred (100) ESI IDs in the text box. ESI IDs need to be separated by a comma. Go to Step 15. If you want to import ESI IDs from a file, leave this field empty. Go to Step 14. NOTE: This field is disabled if you select the option 'All ESI IDs in Account' in previous step.

SMT Procedure – Completing an Energy Data Agreement Invitation	
Step	Action
14	From Step 13 ESIID(s) – Import from a file You can import a file with ESI IDs to be included in the Agreement. The import file must be in a CSV (comma separated values) format and have a file type of CSV. There must be one (1) row of data for each ESI ID and up to one hundred (100) ESI IDs only. Following is an example of the format for an ESI ID file: 99999990000000116 99999990001234567 99999990000000789 Click 'Browse' to select the file from your computer. Go to Step 15. For help creating a CSV file, see Appendix A: Working with CSV Files. NOTE: SMT will reject files that contain trailing commas at the end of each row. NOTE: This field is disabled if you select the option 'All ESI IDs in Account' in previous step.
15	From Step 12 / Step 13 / Step 14 Comments Enter any comments you would like to communicate to your Customer in the Agreement Invitation.
16	Terms and Conditions (required) Check the box to confirm that you have read and agreed to the Terms and Conditions.
17	Click 'Send Invitation' button SMT will send an Agreement Invitation email to your Customer. You will receive a copy of the invitation email. If you have selected a Fixed Energy Data Agreement and entered or imported multiple ESI IDs: • Verify if all the ESI IDs provided are included in the Pending Agreement. • Invalid ESI IDs imported during the initiation will not be included in the Pending Agreement. • Contact the Customer to verify the accuracy of the ESI IDs that are missing from the Agreement. You will receive an email when your Customer accepts or rejects the Agreement.

Figure 26: SMT Procedure – Completing an Energy Data Agreement Invitation

Figure 27: Initiate New Energy Data Agreement Form

6.2.2   In-Home Device Agreement

An In-Home Device Agreement allows a Third-Party Service Provider to add (provision) an In-Home Device to the Customer's Smart Meter.

 NOTE: Only Company Administrators or Authorized Users with the In-Home Device Services permission are allowed to create new In-Home Device Agreements.

SMT Procedure – Creating a New In-Home Device Agreement	
Step	Action
1	Navigate to the 'My Account' tab
2	Select 'Customer Agreements' or 'Customer Agreements (3rd Party)' from the left menu
3	Click 'In-Home Device' button under the Create A New Agreement section

Figure 28: SMT Procedure – Creating a New In-Home Device Agreement

SMT allows the provisioning of up to five (5) In-Home Devices per ESI ID. Each In-Home Device requires a separate In-Home Device Agreement.

You may include up to five (5) In-Home Devices in an In-Home Device Agreement Invitation for a registered SMT Customer. If your Customer is not registered with SMT, you can only have one (1) In-Home Device in the Agreement Invitation.

Your Customer will receive one (1) email per invitation whether the Agreement Invitation has one (1) or multiple In-Home Devices. SMT will create separate Agreements for each Device. Your Customer may accept or reject any or all the Agreements.

Once you have established an In-Home Device Agreement, the Agreement does not expire until one of the following occurs:

- Your Customer moves out of the service location where the In-Home Device is associated

- Your Customer removes the In-Home Device and chooses to terminate the Agreement

- You remove the In-Home Device and choose to terminate the Agreement

- The Agreement is closed by SMT when there is no In-Home Device associated with the Agreement for thirty (30) calendar days.

Before you establish the In-Home Device Agreement, make sure you and your Customer have reviewed the manufacturer's instructions on how to install and operate the new In-Home Device.

SMT Procedure – Completing an In-Home Device Agreement invitation

Step	Action
1	Is Customer registered with SMT? (required) Select 'Yes' if your Customer has a registered account with SMT. 🖍 NOTE: Different information will be required to complete the new Agreement form depending on the SMT registration status of your Customer.
2	Is Customer Residential or Business? (required) Select the type of your Customer. 🖍 NOTE: Different information will be required to complete the new Agreement form depending on the type of your Customer.
3	Account Authorization Code (required if Customer is registered with SMT) Enter your Customer's Account Authorization Code. 🖍 NOTE: Every SMT Customer has a unique Account Authorization Code. If your Customer is a Business, each of its Company Administrators will have their own Account Authorization Code. Verify the Customer information populated on the form to make sure that you are initiating the Agreement with the correct Customer.
4	Email Address (required if Customer is NOT registered with SMT) Enter your Customer's email address.
5	First Name / Business Name, Last Name If your Customer has a SMT account already, these fields will be pre-populated. If your Customer does not have a SMT account: ▪ For Residential Customer, enter their First Name and Last Name. ▪ For Business Customer, enter the Business Name only. 🖍 NOTE: When your Customer receives the Agreement Invitation email and registers with SMT, they may choose to provide a different name for their new SMT account.
6	Phone Number If your Customer has a SMT account already, this field will be pre-populated. If your Customer does not have a SMT account, enter their contact phone number. 🖍 NOTE: When your Customer receives the Agreement Invitation email and registers with SMT, they may choose to provide a different contact phone number for their new SMT account.

SMT Procedure – Completing an In-Home Device Agreement invitation	
Step	Action
7	Language Preference If your Customer is a Residential Customer, you may select the language preference (English or Spanish). ✎ NOTE: When your Customer receives the Agreement Invitation and registers with SMT, they may choose to select a different language preference for their new SMT account.
8	3rd Party Company Name Your Company name is pre-populated here.
9	3rd Party Email, 3rd Party Phone Number, 3rd Party Contact (required) Your email address, phone number and name are pre-populated based on your profile but can be overridden with new information. ✎ NOTE: Your account profile will not be updated with the new contact information you provide for this Agreement Invitation.
10	In-Home Device - ESIID (required) Enter the ESI ID of the Smart Meter which the new device will be provisioned to.
11	In-Home Device – Device Description Enter an optional name for this In-Home Device that will help you remember what the device is (e.g., "ACME Thermostat").
12	In-Home Device – Type of In-Home Device (required) Select the type of In-Home Device that you are adding from the drop down menu.
13	In-Home Device – In-Home Device MAC Address (required) Enter a valid MAC Address, which should be provided with the Device. The MAC Address contains hexadecimal characters only, this means that the MAC Address contains the following letters only: ABCDEF, and the following numbers: 0123456789. An example of a MAC Address is: 001BC5007000052B. If you cannot find the MAC Address, contact the device manufacturer.
14	In-Home Device – Installation Code (required) Enter a valid Installation Code, which should be provided with the Device. The Installation Code contains hexadecimal characters only, this means that the Installation Code contains the following letters only: ABCDEF, and the following numbers: 0123456789. An example of an Installation Code is: 83FED3407A939723A5C639B26916D505C3B5. The installation code can have a maximum of 36 characters. If you cannot find the Installation Code, contact the device manufacturer.

SMT Procedure – Completing an In-Home Device Agreement invitation	
Step	Action
15	'Add Another In-Home Device' button Click this button if you want to add another In-Home Device under this Invitation. 🖍 NOTE: If your Customer does not have a SMT account, you can only have one (1) device per Agreement Invitation. The 'Add Another In-Home Device' button will be disabled. 🖍 NOTE: If your Customer has a SMT account already, you can include up to five (5) In-Home Devices in a single Agreement Invitation. If you already have 5 In-Home Devices in this Agreement Invitation, the 'Add Another In-Home Device' button will be disabled.
16	'Remove' button Click this button if you want to remove a specific In-Home Device under this invitation. 🖍 NOTE: If you only have one (1) In-Home Device entry in the Agreement Invitation, the 'Remove' button will be disabled as you require at least one (1) Device in the Agreement Invitation.
17	Comments Enter any comments you would like to communicate to your Customer in the Agreement Invitation.
18	Terms and Conditions (required) Check the box to confirm that you have read and agreed to the Terms and Conditions.
19	Click 'Send Invitation' button SMT will send an Agreement Invitation email to your Customer. You will receive a copy of the invitation email. You will receive a separate email when your Customer accepts or rejects each of the In-Home Device Agreements created by this invitation.

Figure 29: SMT Procedure – Completing an In-Home Device Agreement Invitation

Figure 30: Initiate In-Home Device Agreement Form

6.2.3   In-Home Device Services Agreement

An In-Home Device Services Agreement allows a Third-Party Service Provider to send text messages, pricing signals and load control events to Customers' In-Home Devices.

NOTE: Only Company Administrators or Authorized Users with the In-Home Device Services permission are allowed to create new In-Home Device Services Agreements.

SMT Procedure – Creating a New In-Home Device Services Agreement	
Step	Action
1	Navigate to the 'My Account' tab
2	Select 'Customer Agreements' or 'Customer Agreements (3rd Party)' from the left menu
3	Click 'In-Home Device Services' button under the Create A New Agreement section

Figure 31: SMT Procedure – Creating a New In-Home Device Services Agreement

You may include up to five (5) In-Home Devices in an In-Home Device Services Agreement Invitation for a registered SMT Customer. If your Customer is not registered with SMT, you can only have one (1) In-Home Device in the Agreement Invitation.

Your Customer will receive one (1) email per invitation whether the Agreement Invitation has one (1) or multiple In-Home Devices. SMT will create a separate Agreement for each Device. Your Customer may accept or reject any or all the Agreements.

Once you have established an In-Home Device Services Agreement, the Agreement does not expire until one of the following occurs:

- Your Customer moves out of the service location where the In-Home Device is associated
- Your Customer removes the In-Home Device and chooses to terminate the Agreement
- You remove the In-Home Device and choose to terminate the Agreement
- The Agreement is closed by SMT when there is no In-Home Device associated with the Agreement for thirty (30) calendar days.

You must select at least one (1) of the following types of messages or any combination of the three for each ESI ID in the Agreement Invitation:

- Simple Text
- Load Control
- Price

You cannot change the type(s) of messages or the Devices in the Agreement once the Invitation is submitted. If you need to change the message type(s) or the Device in the Agreement, you need to terminate the Agreement and establish a new one.

SMT Procedure – Completing an In-Home Device Services Agreement invitation

Step	Action
1	Is Customer registered with SMT? (required) Select 'Yes' if your Customer has a registered account with SMT. NOTE: Different information will be required to complete the new Agreement form depending on the SMT registration status of your Customer.
2	Is Customer Residential or Business? (required) Select the type of your Customer. NOTE: Different information will be required to complete the new Agreement form depending on the type of your Customer.
3	Account Authorization Code (required if Customer is registered with SMT) Enter your Customer's Account Authorization Code. NOTE: Every SMT Customer has a unique Account Authorization Code. If your Customer is a Business, each of its Company Administrators will have their own Account Authorization Code. Verify the Customer information populated on the form to make sure that you are initiating the Agreement with the correct Customer.
4	Email Address (required if Customer is NOT registered with SMT) Enter your Customer's email address.
5	First Name / Business Name, Last Name If your Customer has a SMT account already, these fields will be pre-populated. If your Customer does not have a SMT account: ▪ For Residential Customer, enter their First Name and Last Name. ▪ For Business Customer, enter the Business Name only. NOTE: When your Customer receives the Agreement Invitation email and registers with SMT, they may choose to provide a different name for their new SMT account.
6	Phone Number If your Customer has a SMT account already, this field will be pre-populated. If your Customer does not have a SMT account, enter their contact phone number. NOTE: When your Customer receives the Agreement Invitation email and registers with SMT, they may choose to provide a different contact phone number for their new SMT account.

SMT Procedure – Completing an In-Home Device Services Agreement invitation	
Step	Action
7	Language Preference If your Customer is a Residential Customer, you may select the language preference (English or Spanish). 🖍 NOTE: When your Customer receives the Agreement Invitation and registers with SMT, they may choose to select a different language preference for their new SMT account.
8	3rd Party Company Name Your Company name is pre-populated here.
9	3rd Party Email, 3rd Party Phone Number, 3rd Party Contact (required) Your email address, phone number and name are pre-populated based on your profile but can be overridden with new information. 🖍 NOTE: Your account profile will not be updated with the new contact information you provide for this Agreement Invitation.
10	In-Home Device - ESIID (required) Enter the ESI ID of the Smart Meter which the new device will be provisioned to.
11	In-Home Device – In-Home Device MAC Address (required) Enter a valid MAC Address, which should be provided with the Device. The MAC Address contains hexadecimal characters only, this means that the MAC Address contains the following letters only: ABCDEF, and the following numbers: 0123456789. An example of a MAC Address is: 001BC5007000052B. If you can not find the MAC Address contact the device manufacturer.
12	In-Home Device – Message Type (required) Select all the message types you want to send to your Customer's In-Home Device. You need to select at least one (1) message type per device you entered in this invitation.

SMT Procedure – Completing an In-Home Device Services Agreement invitation	
Step	**Action**
13	'Add Another In-Home Device' button Click this button if you want to add another In-Home Device under this Invitation. 🖉 NOTE: If your Customer does not have a SMT account, you can only have one (1) device per Agreement Invitation. The 'Add Another In-Home Device' button will be disabled. 🖉 NOTE: If your Customer has a SMT account already, you can include up to five (5) In-Home Devices in a single Agreement Invitation. If you already have five (5) In-Home Devices in this Agreement Invitation, the 'Add Another In-Home Device' button will be disabled.
14	'Remove' button Click this button if you want to remove the specific In-Home Device under this Invitation. 🖉 NOTE: If you only have one (1) In-Home Device entry in the Agreement Invitation, the 'Remove' button will be disabled as you are not allowed to remove the only entry.
15	Comments Enter any comments you would like to communicate to your Customer in the Agreement Invitation.
16	Terms and Conditions (required) Check the box to confirm that you have read and agreed to the Terms and Conditions.
17	Click 'Send Invitation' button SMT will send an Agreement Invitation email to your Customer. You will receive a copy of the invitation email. You will receive an email when your Customer accepts or rejects the Agreement(s).

Figure 32: SMT Procedure – Completing an In-Home Device Services Agreement Invitation

*Indicate a required field

* Is customer already registered with SMT?   ○ Yes ● No

* Is customer Residential or Business?   ○ Residential ● Business

Customer Information

Account Authorization Code:

* Email Address:

* Business Name:

Last Name:

Phone Number:

Language Preference: English ▼

3rd Party Contact Information

* 3rd Party Company Name: CJ_thirdparty9

* 3rd Party Email: cj.testing4.3.5@gmail.com

* 3rd Party Phone Number: 9122121123

* 3rd Party Contact: Chandni ja

Agreement Information

* **In-Home Device 1**

* ESIID

* In-Home Device MAC Address

* Message Type: ☐ Simple Text

                         ☐ Load Control

                         ☐ Price

[Remove]

[Add Another In-Home Device]

Comments

Terms and Conditions

WEBSITE TERMS AND CONDITIONS
Created: October 2009

These Website Terms and Conditions (these "Terms") set forth the terms and conditions for use of this website (this "Website") to gain access to the Texas Common Portal and Data Repository (the "Web Portal"). In these Terms, "you" or "your" refers to any user of this Website, and "we" or "us" or "our" refers to the owner(s) or operator(s) of this Website.

Please read these Terms and the information referred to or linked to in these Terms carefully and ensure you understand them. From time to time, we may unilaterally modify these Terms, so it is important that you review these Terms every time you use this Website. Any use of this Website is conditioned on your agreement to, and compliance with, all of these Terms. Your initial acceptance of these Terms and your continued use of this Website constitutes your agreement to comply with all of the terms and conditions in these Terms.

1.   Use of this Website

* ☐ I agree to use this web portal in accordance with the Terms and Conditions.

[Send Invitation] [Cancel]

Figure 33: Initiate In-Home Device Services Agreement Form

6.3   View and Edit Customer Agreements

To view and edit your Customer Agreement, you must first have a Customer Agreement List displayed. See Section 6.1 Displaying Your Customer Agreement List – My Account.

You can view your Customer Agreements that are Pending, Extension Pending, Active or Close Pending at any time. If your Agreement is Rejected or Not Accepted, or your Agreement is Closed or Completed, you will no longer be able to view the Agreement after thirty (30) calendar days. For the descriptions of the Customer Agreement Status, refer to Section 6.3.1 Customer Agreement Status.

NOTE: Only Company Administrators or Authorized Users with the Energy Data and In-Home Device Services permissions are allowed to edit Customer Agreements. Users without the permissions can view Customer Agreements only.

SMT Procedure – View/Edit Customer Agreement	
Step	Action
	NOTE: You must first select the desired Customer Agreement from your Customer Agreement List and display the Agreement on your View & Edit Customer Agreement screen before you can complete the following steps. Refer to Section 6.1 Displaying Your Customer Agreement List – My Account to learn how to search for your Agreement.
1	Select checkbox (required) Select the checkbox next to one of the Customer Agreements.
2	Click 'View/Edit Agreement' button NOTE: View/Edit Agreement is only available for one Agreement at a time.

Figure 34: SMT Procedure – View/Edit Customer Agreement

6.3.1   Customer Agreement Status

You can find the status of the Customer Agreement that you are viewing on the View and Edit Customer Agreement screen. Figure 35 defines the various statuses of a Customer Agreement.

Customer Agreement Status Values	
Status	Status Description

Customer Agreement Status Values	
Status	**Status Description**
Active	Your Customer has accepted your Agreement. If you have an active Energy Data Agreement, you are now able to view your Customer's usage data. If you have an active In-Home Device Agreement: • Your In-Home Device is now in progress of being added to your Customer's Smart Meter or it has been added successfully. For status descriptions of your In-Home Device, see Section 9.1. • You can remove the In-Home Device from the Customer's Smart Meter and keep your Agreement in Active status for up to thirty (30) calendar days. See Section 9.3 for more information of Removing In-Home Devices. If you have an active In-Home Device Services Agreement, you are now able to send the selected type(s) of messages to your Customer's In-Home Device.
Pending	You have successfully submitted the Agreement Invitation to your Customer, your Customer has not responded, and the 30-calendar-day Agreement Invitation window has not yet expired.
Extension Pending	You have successfully submitted a request to your Customer to extend the Energy Data Agreement, your Customer has not responded, and the 30-calendar-day Extension Request window has not yet expired. 🖊 NOTE: This status is only applicable to Energy Data Agreement.
Rejected	Your Customer has rejected your Agreement Invitation.
Not Accepted	Your Customer did not take any action to your Agreement Invitation. The acceptance / rejection window of your Agreement Invitation is now expired. You need to create a new invitation if you want to invite your Customer for the same Agreement again. 🖊 NOTE: Check with your Customer prior to submitting a new invitation. If your Customer did not have a SMT account before but has completed the SMT registration process recently, you will need to indicate that your Customer is a Registered Customer in the new invitation.
Close Pending	When you or your Customer chooses to terminate the In-Home Device Agreement when removing the In-Home Device from your Customer's Smart Meter, the Agreement will be set to this status while SMT is coordinating with your Customer's TDSP to remove the In-Home Device. 🖊 NOTE: Once your Customer's TDSP removes the In-Home Device successfully, the Agreement will be Closed.

Customer Agreement Status Values	
Status	Status Description
Closed	Your Agreement has been terminated by you or your Customer. SMT will terminate your Agreement if one of the following occurs: ▪ If you have a Fixed ESI IDs Energy Data Agreement and your Energy Data Agreement is not associated with at least one ESI ID (e.g. if your Customer has removed the ESI ID associated with your Energy Data Agreement from their SMT account). ▪ If you have an In-Home Device Agreement or an In-Home Device Services Agreement and your Customer has moved out. ▪ If you have an In-Home Device Agreement or an In-Home Device Services Agreement and the Agreement is not associated with an In-Home Device for thirty (30) calendar days.
Completed	You have reached the end of the terms of the Energy Data Agreement. Once the Agreement is completed, you have to create a new Agreement Invitation if your Customer agrees to allow you to continue accessing their usage data. 🖊 NOTE: An Energy Data Agreement is active up to twelve (12) months only. If your initial invitation of the Energy Data Agreement has the duration of less than twelve (12) months, you can request an extension of the Agreement before the Agreement changes to the Completed status. 🖊 NOTE: This status is only applicable to Energy Data Agreement.

Figure 35: Customer Agreement Status Values

6.3.2   Sending an Agreement Invitation or Extension Request Reminder

New Customer Agreement Invitations and Energy Data Agreement Extension Requests expire in thirty (30) calendar days. You can send one (1) reminder email to your Customer via SMT if your Customer has not responded to your Agreement Invitation or Extension Request any time before your invitation or request expires. The reminder email will not renew the expiration window of the Agreement Invitations or the Extension Requests.

Your Agreement must be in the Pending or Extension Pending (for Energy Data Agreement only) status to send the reminder email.

🖊 NOTE: Only Company Administrators or Authorized Users with Energy Data and In-Home Device Services permissions are allowed to send reminder emails to the Customers.

SMT Procedure – Send Agreement Invitation Reminder Email	
Step	Action
	🖊 NOTE: You must first select the desired Customer Agreement from your Customer Agreement List and display the Agreement on your View & Edit Customer Agreement screen before you can complete the following step. Refer to Section 6.1 Displaying Your Customer Agreement List to learn how to search for your Agreement.
1	Click 'Resend Email' button You will receive a confirmation on the screen that your Agreement Invitation email or Extension Request email has been resent to your Customer successfully. 🖊 NOTE: Resend Email is only available for Agreements with Pending or Extension Pending status. 🖊 NOTE: You can only send one (1) reminder email to your Customer. Once you send a reminder, the Resend Email button will be disabled.

Figure 36: SMT Procedure – Send Agreement Invitation Reminder Email

6.3.3 Extending an Energy Data Agreement

An Energy Data Agreement has a maximum duration of twelve (12) months. Once the Agreement reaches the end of its term, you must create a new Agreement with the Customer.

If the Energy Data Agreement is less than twelve (12) months in duration and it has at least one (1) ESI ID associated with it, you can request an extension of the Agreement at any time before it expires.

🖊 NOTE: You can request an extension of an Energy Data Agreement multiple times, until the Agreement reaches the maximum duration of twelve (12) months.

🖊 NOTE: Only Company Administrators or Authorized Users with the Energy Data permission are allowed to request an Energy Data Agreement Extension.

Your Customer has thirty (30) calendar days to accept or reject your Extension Request. You cannot request an extension of the Energy Data Agreement if your last Extension Request is still pending.

Your Customer will receive an email from SMT indicating that you are requesting their acceptance of the Extension. If your Customer accepts the request, you will receive an email with the confirmation and the Agreement Duration will be updated. If your Customer rejects your request to extend the Agreement, you will receive a notification of the rejection and there will be no impact to the current duration of your Agreement.

For example, your Energy Data Agreement with the Customer is eight (8) months in duration. You may request an extension of up to four (4) months. If your Customer accepts your request, the term of your Agreement will now be twelve (12) months. If your Customer rejects your request, the Agreement will remain with eight (8) months in duration.

NOTE: Your Customer can extend the Energy Data Agreement with you at any time before the Agreement is completed without your approval.

NOTE: If the original term of the Agreement is twelve (12) months or the Agreement has been extended to twelve (12) months, the Extension Request function will not be available to you or your Customer.

SMT Procedure – Requesting an Energy Data Agreement Extension	
Step	Action
	NOTE: You must first select the desired Customer Agreement from your Customer Agreement List and display the Agreement on your View & Edit Customer Agreement screen before you can complete the following steps. Refer to Section 6.1 Displaying Your Customer Agreement List to learn how to search for your Agreement.
1	Extend Agreement By (required) Select the number of months you would like to request for the extension from the dropdown. For example, if your Agreement currently has duration of eight (8) months, you can extend the Agreement for one (1) month, three (3) months, or up to one (1) year.
2	Click 'Extend Agreement' button You will receive a confirmation on the screen that your Extension Request email has been sent to your Customer successfully. NOTE: The 'Extend Agreement' button is only available for an Energy Data Agreement that has at least one (1) ESI ID.

Figure 37: SMT Procedure – Requesting an Energy Data Agreement Extension

6.3.4   Terminating an Agreement

You can terminate an Energy Data Agreement or In-Home Device Services Agreement with your Customer at any time if the Agreement is in Pending, Extension Pending, or Active status.

Once the Agreement is terminated, you need to create a new Agreement with the Customer to regain your access.

You cannot terminate an In-Home Device Agreement directly. You can choose to keep or terminate an In-Home Device Agreement when you remove the In-Home Device. See Section 9.3 to learn how to remove an In-Home Device and terminate the associated In-Home Device Agreement.

NOTE: Your Customer can terminate an Agreement with you at any time without your approval. You will receive an email from SMT informing you that your Customer has terminated the Agreement.

NOTE: Only Company Administrators or Authorized Users with Energy Data permission are allowed to terminate an Energy Data Agreement, and In-Home Device Services permission to terminate an In-Home Device Services Agreement.

SMT Procedure – Terminating an Energy Data Agreement or In-Home Device Services Agreement	
Step	Action
	NOTE: You must first select the desired Customer Agreement from your Customer Agreement List and display the Agreement on your View & Edit Customer Agreement screen before you can complete the following step. Refer to Section 6.1 Displaying Your Customer Agreement List to learn how to search for your Agreement.
1	Click 'Terminate Agreement' button You will receive a confirmation on the screen that your Agreement is terminated. NOTE: Terminate Agreement is only available if the Agreement Status is 'Pending', 'Extension Pending' or 'Active'.

Figure 38: SMT Procedure – Terminating an Energy Data Agreement or In-Home Device Services Agreement

7   Creating Meter and Premise Information Reports

Information about individual Meters and Premises is available in SMT for each one of the Smart Meters that you can access. To request a Meter and/or Premise Information Report you must first select the Energy Data Agreement from your Customer Agreement List.   See Section 6.1 Displaying Your Customer Agreement List – My Account.

7.1   Viewing Meter and Premise Information

You can only view Meter or Premise Information for one (1) ESI ID at a time. You must first select an ESI ID from your ESI ID list under the Energy Data Agreement to be able to View Meter and Premise Information.

SMT Procedure – Viewing Meter and Premise Information (1 ESI ID)	
Step	Action
	🖊 NOTE: You must first select the desired Energy Data Agreement from your Customer Agreement List and display the Agreement on your View & Edit Customer Agreement screen before you can complete the following steps. Refer to Section 6.1 Displaying Your Customer Agreement List to learn how to search for your Agreement.
1	Click 'View ESIIDs' button The list of ESI IDs under the Energy Data Agreement will be displayed. 🖊 NOTE: If your Energy Data Agreement has more than 500 ESI IDs, SMT will only display the first 500 ESI IDs. You need to use the 'Export all ESIID(s)' button to request a report that provides you with the complete list of ESI IDs under the Agreement.
2	Select checkbox (required) Select the checkbox next to an ESI ID. You may view information for only one (1) ESI ID at a time.
3	Click either the 'View Meter Information' button, or the 'View Premise Information' button. When selecting the 'View Meter Information' button, the information related to the meter will be displayed. When selecting the 'View Premise Information' button, the information related to the premise (or service address) will be displayed. 🖊 NOTE: You can see a brief description by positioning your mouse over the field name.

Figure 39: SMT Procedure – Viewing Meter and Premise Information (1 ESI ID)

7.1.1   Meter Information

Figure 40 describes the values that are shown with Meter Information.

Meter Information Values	
Field Name	**Brief Description**
Electric Utility Company	Company that transmits and distributes electricity for this Smart Meter
ESI ID	Electric Service Identifier
kWh Meter Multiplier	A multiplying factor that is used to convert kWh readings to kWh consumption on certain (instrument rated) meters
Number of Channels	Number of Channels the Meter is Configured for
Meter Manufacturer Name	Company that manufactured the Meter
Last Meter Test Date	Last date the Meter was manually tested
Meter Class (Ampacity)	The maximum current (amperes) the meter can register continuously without creating an unsafe condition at the meter socket
Meter Installation Date	Date Meter was Installed
Meter Activation Date	Date when Meter started sending Usage Information to SMT
Technology/Communicator Indicator	Indicator of the type of communication used to transport data from the Meter
Instrument Rated	Indicator of whether or not the Meter requires a Current Transformer / Potential Transformer
Ratio of Current Transformers	The ratio of the primary to secondary transformer windings of a current transformer that is on the source side of an instrument rated meter
Ratio of Potential Transformers	The ratio of the primary to secondary transformer windings of a potential or voltage transformer that is on the source side of an instrument rated meter
ESI Firmware Version	The firmware version of the ZigBee communication module
HAN Protocol (ZigBee or HomePlug)	Type of HAN Protocol enabled (displayed if available)
Smart Energy Profile	The HAN compliance specification that this meter supports
Interval Setting	How often the Meter is recording usage (length in minutes of the interval)
In flow / Out flow (DG) Capable	Indicator of whether or not the Meter is able to handle both consumption and generation metering

Meter Information Values	
Field Name	Brief Description
Distributed Generation Channel	The channel number on the meter of the Distributed Generation channel (displayed if available)
Remote disconnect / connect Capable	Indicator of whether or not the Meter is enabled for remote disconnects
Meter Status	If the value is E or e, it means that the Meter is energized; If the value is D or d, it means that the Meter is de-energized (displayed if available)
Meter Phases	The number of phases that the meter handles, either 1, 2 or 3 (displayed if available)
Meter Model	Meter Model Identifier (displayed if available)
Last Updated	Last date and timestamp that the Meter Information was updated

Figure 40: Meter Information Values

7.1.2   Premise Information

Figure 41 describes the values that are displayed with Premise Information.

Premise Information Values	
Field Name	Brief Description
Electric Utility Company	Company that transmits and distributes electricity for this Smart Meter
ESI ID	Electric Service Identifier
Service Voltage	Voltage at the Premise (displayed if available)
Premise Status	If the value is A or a, it means the Premise is active; if the value is I or i, it means that the Premise is inactive
Time Zone	The time zone where the premise is located
House Number	The House Number of the service address (displayed if available)
Fractional House Address	Designator that can be used to distinguish premises with the same address (displayed if available)
Leading Directional	The directional indicator (typically N, S, E, W) that precedes the street name (displayed if available)
Street Name	The street name for the service address
Street Type	The street type (e.g. St, Ave, Ln) for the service address (displayed if available)

Premise Information Values	
Field Name	Brief Description
Trailing Directional	The directional indicator that occurs after the street type (displayed if available)
Unit Designation	Denotes individual premises in multi-unit addresses, for example in apartment buildings (displayed if available)
City	The city or locality of the service address
State	The state of the service address
ZIP Code	The primary, five digit ZIP Code of the service address
Zip Code + 4	The secondary, four digit ZIP Code of the service address (displayed if available)
Meter Read Cycle	The cycle number corresponding to a meter read cycle date when data is reported for the monthly billing period
Load Profile	Describes the load profile at the service location as per ERCOT specifications
Rate Class/Code	Code that identifies the tariff used by the TDSP billing this location (displayed if available)
AMS Profile Effective Date	Effective start date for SMT to start sending usage data to ERCOT (displayed if available)

Figure 41: Premise Information Values

7.2   Print or Export from View

If you are currently viewing Meter or Premise Information online, you may print the information or export the information to a file.

SMT Procedure – Printing or Exporting from View – Meter and Premise Information	
Step	Action
	✎ NOTE: You must have Meter or Premise information for a Smart Meter showing on your screen before you can execute this procedure. See Section 7.1 Viewing Meter and Premise Information for more information on how to view Meter and Premise information.
1	Click 'Print' button or 'Export' button

Print will cause your displayed report to print.

Export will cause your displayed report to be immediately downloaded to a CSV file. For information on using SMT CSV files, see Appendix A.2 Opening a CSV File. |

Figure 42: SMT Procedure – Printing or Exporting from View – Meter and Premise Information

7.3   Exporting Reports

You may export the Meter and Premise Information of multiple ESI ID(s) at the same time without viewing online.

SMT Procedure – Requesting Reports for Export – Premise and Meter Information	
Step	Action
	🖊 NOTE: You must first select the desired Energy Data Agreement from your Customer Agreement List and display the Agreement on your View & Edit Customer Agreement screen before you can complete the following steps. Refer to Section 6.1 Displaying Your Customer Agreement List to learn how to search for your Agreement.
1	Click 'View ESIID(s)' button The list of ESI IDs under the Energy Data Agreement will be displayed. 🖊 NOTE: If your Energy Data Agreement has more than 500 ESI IDs, SMT will only display the first 500 ESI IDs. You need to use the 'Export all ESIID(s)' button to request a report that provides you with the complete list of ESI IDs under the Agreement.
2	Select checkbox (required) Select the checkbox next to one or more ESI IDs.
3	Click 'Export Information' button A new screen is displayed allowing you to select Types of Information for this export.
4	Premise Information Select the checkbox to request the Premise Information for each of the previously selected ESI IDs. Meter Information Select the checkbox to request the Meter Information for each of the previously selected ESI IDs. 🖊 NOTE: You may request either one or both Premise and Meter Information reports.
5	Click 'Export' button A new screen will display showing an Order Number for your report request. Your request will be run offline. When the request completes, an email will be sent to the Email Address in your Account Profile. For information on retrieving your report, see Section 8.4.3 Retrieving Exported Reports.

Figure 43: SMT Procedure – Requesting Reports for Export – Premise and Meter Information

8   Creating Usage Reports

If you have an Energy Data Agreement established with your Customer, you will be able to access your Customer's usage data. There are three (3) types of Usage Data Reports available on SMT:

- Daily Usage (15 min intervals) Report
- Daily Meter Reads Report
- Monthly Usage Report

You may view or request exports of these reports online, create automated scheduled reports, or request exports via Application Programming Interfaces (API).

8.1   Displaying Your Customer Meter List – Usage

Your Customer Meter List contains all of the Smart Meters that are associated with all the Active Energy Data Agreements in your Account. Figure 44 shows an example of a Customer Meter List when displayed in SMT.

Showing 1 - 1 of 1

	Customer Agreement #	ESIID	Customer Last Name	Service Address	City
☐	1442	000000000000000000000	bell	9213 LONG POINT RD	HOUSTON

Figure 44: Customer Meter List – Usage

If you have twenty-five (25) or fewer Smart Meters associated with all your Active Energy Data Agreements in your Account, your Meter List will automatically display. If you have more than twenty-five (25) Smart Meters, you will need to search for meters to display in your list.

SMT Procedure – Displaying Customer Meter List (25 or fewer meters) – Usage	
Step	Action
1	Navigate to the 'Usage' tab
2	Select 'Customer Meters' or 'Customer Meters (3rd Party)' from the left menu NOTE: If you are a Retail Electric Provider (REP), select 'Customer Meters (3rd Party)' on the left menu to access usage data of the Smart Meters associated with an active Energy Data Agreement.

Figure 45: SMT Procedure – Displaying Customer Meter List (25 or fewer) – Usage

8.1.1   Searching for Meters – Usage

If you have more than 25 Smart Meters associated with your Active Energy Data Agreements, a Search screen will be displayed. You must search for a specific Smart Meter or a group of Smart Meters to populate the search results with a Customer Meter List. You also may select the link 'Show All' to display all the Smart Meters associated with your Account.

NOTE: If you have more than 500 Smart Meters associated with your Active Energy Data Agreements, the 'Show All' link will not appear. In this case, you must search for a specific Smart Meter or group of Smart Meters. A search can be performed on up to 100 ESI IDs or Agreement Number if you enter the values on the search screen. To learn how to conduct a search on more than 100 Customer Agreements read the Section 8.1.2 Search for Meters by Importing a File.

SMT Procedure – Displaying Customer Meter List (Show All) – Usage	
Step	Action
1	Navigate to the 'Usage' tab
2	Select 'Customer Meters' or 'Customer Meters (3rd Party)' from the left menu
3	Click 'Show All' link

Figure 46: SMT Procedure – Displaying Customer Meter List (Show All) – Usage

SMT Procedure – Displaying Customer Meter List (Search for Meters) – Usage	
Step	Action
1	Navigate to the 'Usage' tab
2	Select 'Customer Meters' or 'Customer Meters (3rd Party)' from the left menu
3	Select type of meter identifier (required) Select to search by Customer Agreement Number, Customer Last Name / Business Name or ESI ID.

SMT Procedure – Displaying Customer Meter List (Search for Meters) – Usage	
Step	Action
4	Type one or more Search Items (required)
	Enter up to 100 Customer Agreement Numbers, Customer Last Name / Business Name, or ESI IDs to correspond with your search type. Values should be separated by a comma (,).
	You may enter a wildcard search by entering at least two (2) characters and an asterisk (*). The asterisk may be at the beginning, in the middle, or at the end of the string (for example: 123*, 1*23, or *123).
	123* shows all ESI IDs that begin with '123'
	1*23 shows all ESI IDs that begin with '1' and end with '23'
	*123 shows all ESI IDs that end with '123'
	You can only use one wildcard/asterisk in a given search. If you use a wildcard, you may not enter other search values.
5	Click 'Search' button

Figure 47: SMT Procedure – Displaying Customer Meter List (Search for Meters) – Usage

8.1.2   Search for Meters by Importing a File

If you routinely search for the same set of Smart Meters, you may find it beneficial to create a file containing your list of meters. You can then import that file and search for specific meters in a single step. The import file must be in a CSV (comma separated values) format and have a file type of CSV. There must be one (1) row of data for each Smart Meter. Each row will have only one ESI ID that identifies a Smart Meter. Following is an example of the format for an ESI ID file:

    99999990000000116
    99999990001234567
    99999990000000789

For help creating a CSV file, see Appendix A: Working with CSV Files.

NOTE: SMT will reject files that contain trailing commas at the end of each row.

SMT Procedure – Search by Importing a File	
Step	Action
1	Navigate to the 'Usage' tab
2	Select 'Customer Meters' or 'Customer Meters (3rd Party)' from the left menu

SMT Procedure – Search by Importing a File	
Step	Action
3	Select a search criteria (required) You must select ESI ID(s) as your search criteria. All entries in the corresponding import file will be interpreted as this type of value.
4	Import ESIID(s) from a file (required) The file type must be CSV. Click 'Browse' to select the file from your computer. For help creating a CSV file, see Appendix A: Working with CSV Files.
5	Click 'Import' button Import the file and search for the designated ESI IDs in your Meter List. The results of your search will be consolidated in a file and the following message will appear on your screen: ☐ The information in your import file was used to search your Meter List. Select this Checkbox and Click on Export Report(s) to use the search results to request Usage Reports. Select the checkbox if you want to create and export the usage data reports for all of the Smart Meters that are found successfully from your search. For information on exporting reports, see Section 8.4 Exporting Reports.

Figure 48: SMT Procedure – Search by Importing a File

8.2   Viewing Reports

If you only have one (1) Active Energy Data Agreement in your account and the Agreement has one (1) ESI ID only, then the Daily Usage (15 min intervals) report for that Smart Meter will automatically display upon selecting the Usage tab.

SMT Procedure – Viewing Reports (1 meter)	
Step	Action
1	Navigate to the 'Usage' tab
2	Select 'Customer Meters' or 'Customer Meters (3rd Party)' from the left menu

Figure 49: SMT Procedure – Viewing Reports (1 meter)

If you have more than one (1) Active Energy Data Agreement in Account, then you must first display your Customer Meter List before you can view a report online. Since you can only view reports online for one (1) ESI ID at a time, the view function is not valid with Search by Importing a File. For more information on displaying your Meter List, see Section 8.1 Displaying Your Customer Meter List – Usage.

SMT Procedure – Viewing Reports (more than 1 meter)	
Step	Action
	🖍 NOTE: You must have a Customer Meter List displayed before you can complete these steps. For information on displaying your Meter List, see Section 0 If you have an Energy Data Agreement established with your Customer, you will be able to access your Customer's usage data. There are three (3) types of Usage Data Reports available on SMT: ▪ Daily Usage (15 min intervals) Report ▪ Daily Meter Reads Report ▪ Monthly Usage Report You may view or request exports of these reports online, create automated scheduled reports, or request exports via Application Programming Interfaces (API). Displaying Your Customer Meter List – Usage.
1	Select checkbox (required) Select the checkbox next to the Energy Data Agreement and ESI ID combination. You may view reports for only one (1) ESI ID at a time.
2	Click 'View Report' button The Daily Usage (15 min intervals) report is displayed.

Figure 50: SMT Procedure – Viewing Reports (more than 1 meter)

Report Options can be selected from the top portion of any Report screen. You can change these options to view different reports for the Smart Meter that was selected. If you want to see a report for a different Smart Meter, you must go back to your Meter List and select a different meter.

SMT Procedure – Changing Report Options	
Step	Action
	🖍 NOTE: You must have a report displayed before you can complete these steps.
1	Report Type (required) Select the desired report from the dropdown box. You may select 'Daily Usage (15 min intervals)' , 'Daily Meter Reads', or 'Monthly Usage'

SMT Procedure – Changing Report Options	
Step	Action
2	View (required) Select 'Current Version' to see only the most current data available for the report. This is the only data that your Customers will see. Select 'Version Updates' to see the current plus any previous versions of data available for the report.
3	Start Date (required) Enter a date, or use the Calendar Tool to select a date, that represents the beginning range of the usage data that you would like to see. Your Start Date cannot be prior to the start date of your Energy Data Agreement with this Customer. NOTE: Usage data will not be available in SMT prior to February 1, 2010, or prior to the Customer's Smart Meter installation date, if it occurred after February 1, 2010.
4	End Date (required) Enter a date, or use the Calendar Tool to select a date, that represents the ending range of the usage data that you would like to see. NOTE: Usage data is retrieved from Smart Meters by the TDSP. SMT receives usage data 7-days/week from the TDSP companies. The data is made available through the SMT website within 2 calendar days. For example, usage data through midnight on Monday is available on Wednesday.
5	Click 'Update Report' button The report options are changed. If your selected options require a small amount of data (for example, less than 40 days for the Daily Usage report) then your report view will update immediately to reflect the new options. If your selected options require a large amount of data (for example, 6 months for the Daily Usage report) then your request will be run offline. In this situation, SMT will display a confirmation screen with an Order Number for your report request. When the request completes, an email will be sent to the Email Address in your Account Profile. If you requested a Monthly Usage Report, your report will be attached to the email. If you have requested the Daily Usage (15 min Interval) Report or the Daily Meter Reads Report, it will be available on your FTP folder. For information on retrieving your report, see Section 8.4.3 Retrieving Exported Reports.

Figure 51: SMT Procedure – Changing Report Options

8.2.1   Daily Usage (15 min intervals) Report

The Daily Usage (15 min intervals) report shows electricity usage for the selected Smart Meter in 15-minute segments. The report view displays 96 intervals (one for each 15-minute segment of a 24-hour day) of usage data for one day at a time. Use the Previous Day and Next Day buttons to navigate to other days within your selected date range.

Figure 52: Daily Usage (15 min intervals) Report

8.2.2   Daily Meter Reads Report

The Daily Meter Reads report shows electricity usage for the selected Smart Meter in 1-day segments. The report view displays up to 30 days of usage data at a time. Use the Previous and Next buttons to navigate to other days within your selected date range.

Figure 53: Daily Meter Reads Report

NOTE: N/A is displayed if the Start and/or End read values for a day are not available.

8.2.3   Monthly Usage Report

The Monthly Usage report shows the total monthly electricity usage for the selected Smart Meter. You may request up to the previous 24 months of usage data.

🖊 NOTE: The Monthly Usage Report provides the monthly electricity usage that the TDSP reports to the Retail Electric Provider.

Figure 54: Monthly Usage Report

🖊 NOTE: N/A is displayed if the kWh value for a month is not available.

8.2.4   On Demand Read Report

You may request an On Demand Read of a Customer's meter during your viewing of any one of the Usage Report online. SMT allows you to request an On Demand Read of a Customer's meter once every hour, 24 times in a day.

SMT Procedure – Requesting an On Demand Read
🖉 NOTE: You must have a report displayed before you can complete these steps.

Step	Action
1	Click 'On Demand Read' button Your On Demand Read request will be processed immediately. You may click the link provided 'Click here' to refresh the page after a few moments. The On Demand Read Report section will be refreshed with the latest data. 🖉 NOTE: If the On Demand data is NOT successfully retrieved, you will see a message "Error! On Demand Read request could not be fulfilled. Please try again" displayed on the report screen. You may try to request again. 🖉 NOTE: If you have submitted a request within an hour and the request has been processed by SMT, this button will be disabled. You may come back to the Usage Report screen to make another request for the same Customer's meter after an hour.

Figure 55: SMT Procedure – Requesting an On Demand Read

8.3   Print or Export from View

If you are currently viewing a report online, you may print the report or export the report to a file.

SMT Procedure – Printing or Exporting from View

Step	Action
🖉 NOTE: You must have a report displayed before you can complete these steps. For more information on viewing reports, see Section 8.2 Viewing Reports.	

SMT Procedure – Printing or Exporting from View	
Step	Action
1	Click 'Print' button or 'Export' button
	Print will cause your displayed report to print. The full report, as designated by the current Report Options, will print even though your view may only be displaying a specific page.
	Export will download your report to a CSV file immediately. The full report, as designated by the current Report Options, will export even though your view may only be displaying a specific page. The file will be in a CSV format. For information on using SMT CSV files, see Appendix A.2 Opening a CSV File.

Figure 56: SMT Procedure – Printing or Exporting from View

8.4   Exporting Reports

If you have more than one (1) Energy Data Agreement or more than (1) ESI IDs in your Energy Data Agreement in your Account, you may choose to Export your Report Request without first viewing online.

8.4.1   Requesting Ad-hoc Reports

An Ad-hoc Report Request will be processed by SMT offline. Once you submit the request, you will be given an Order ID for tracking and you will receive the report in your FTP folder.

Ad-hoc Reports can be exported in Green Button (XML) format or in CSV format. The CSV format can be used with MS Excel, and the XML format can be used with programming applications that process the file.

The Green Button icon, which is located on several pages of the Smart Meter Texas site, allows you to download your Customer's energy usage information from SMT into a nationally standardized format. The Green Button allows you to download up to 12 months of data from the Daily Usage (15 min intervals) report.

Figure 57: Green Button Icon

If you want to export Daily Meter Reads or Monthly Usage data, you may export your reports in CSV format. With the CSV format option, you may select multiple Smart Meters to be processed for your report at the same time. The CSV report option allows you to download up to 12 months of data for all three report options (i.e. "Daily Usage (15 min intervals) report", "Daily Meter Reads" and "Monthly Usage").

NOTE: You may select multiple ESI IDs to be processed for your Ad-hoc report at the same time.

SMT Procedure – Requesting Ad-hoc Reports for Export	
Step	**Action**
	NOTE: You must have a Customer Meter List displayed before you can complete the remaining steps. For information on displaying your Meter List, see Section 0 If you have an Energy Data Agreement established with your Customer, you will be able to access your Customer's usage data. There are three (3) types of Usage Data Reports available on SMT: ▪ Daily Usage (15 min intervals) Report ▪ Daily Meter Reads Report ▪ Monthly Usage Report You may view or request exports of these reports online, create automated scheduled reports, or request exports via Application Programming Interfaces (API). Displaying Your Customer Meter List – Usage.
1	Select checkbox (required) Select the checkbox next to one or more Smart Meters, or select the checkbox next to the 'Search by Import' message.
2	Click 'Export Report(s)' button A new screen is displayed allowing you to select Report Options for this export.
Ad-hoc Report Option:	
3	Daily Usage checkbox Select the checkbox to request that the Daily Usage (15 min intervals) report be generated for each of the previously selected Smart Meters. NOTE: You may request one report or all 3 types of report at the same time.
4	Daily Usage Start Date (required if Daily Usage checkbox is selected) Enter a date, or use the Calendar Tool to select a date, that represents the beginning range of the usage data that you would like to see. Your Start Date cannot be more than 12 months prior to the start date of the Energy Data Agreement with your Customer. NOTE: Usage data will not be available in SMT prior to February 1, 2010, or prior to the Smart Meter installation date, if it occurred after February 1, 2010.

SMT Procedure – Requesting Ad-hoc Reports for Export	
Step	Action
5	Daily Usage End Date (required if Daily Usage checkbox is selected)
	Enter a date, or use the Calendar Tool to select a date, that represents the ending range of the usage data that you would like to see.
	NOTE: Usage data is retrieved from Smart Meters by the TDSP. SMT receives usage data 7-days/week from the TDSP companies. The data is made available through the SMT website within 24 hours of the last meter retrieval. For example, usage data through midnight on Monday is available by 12:01 AM on Wednesday.
6	Daily Meter Reads checkbox
	Select the checkbox to request that the Daily Meter Reads report be generated for each of the previously selected Smart Meters.
	NOTE: You may request one report or all 3 types of report at the same time.
7	Daily Meter Reads Start Date (required if Daily Meter Reads checkbox is selected)
	Enter a date, or use the Calendar Tool to select a date, that represents the beginning range of the usage data that you would like to see. Your Start Date cannot be more than 12 months prior to the start date of the Energy Data Agreement with your Customer.
	NOTE: Usage data will not be available in SMT prior to February 1, 2010, or prior to the Smart Meter installation date, if it occurred after February 1, 2010.
8	Daily Meter Reads end Date (required if Daily Meter Reads checkbox is selected)
	Enter a date, or use the Calendar Tool to select a date, that represents the ending range of the usage data that you would like to see.
	NOTE: Usage data is retrieved from Smart Meters by the TDSP. SMT receives usage data 7-days/week from the TDSPs. The data is made available through the SMT website within 24 hours of the last meter retrieval. For example, usage data through midnight on Monday is available by 12:01 AM on Wednesday.
9	Monthly Usage checkbox
	Select the checkbox to request that the Monthly Usage report be generated for each of the previously selected Smart Meters.
	NOTE: You may request one report or all 3 types of report at the same time.

SMT Procedure – Requesting Ad-hoc Reports for Export	
Step	Action
10	Monthly Usage Start Date (required if Monthly Usage checkbox is selected)
	Enter a date, or use the Calendar Tool to select a date, that represents the beginning range of the usage data that you would like to see. Your Start Date cannot be more than 12 months prior to the start date of the Energy Data Agreement with your Customer.
	NOTE: Usage data will not be available in SMT prior to February 1, 2010, or prior to the Smart Meter installation date, if it occurred after February 1, 2010.
11	Monthly Usage End Date (required if Monthly Usage checkbox is selected)
	Enter a date, or use the Calendar Tool to select a date, that represents the ending range of the usage data that you would like to see.
12	Click 'Export' button
	A confirmation screen will be displayed showing an Order Number for your report request. Your request will be run offline. When the request completes, your report will be placed in your FTP folder. If you have requested the Daily Usage (15 min Interval) Report or the Daily Meter Reads Report, it will also be available on your FTP folder. For information on retrieving your report, see Section 8.4.3 Retrieving Exported Reports.
13	Click the Green Button Icon
	A new screen will display showing an Order Number for your report request. Your request will be run offline. When the request completes, an email will be sent to the Email Address in your Account Profile. Your report will be attached to the email. For information on retrieving your report, see Section 8.4.3 Retrieving Exported Reports.

Figure 58: SMT Procedure – Requesting Ad-hoc Reports for Export

8.4.2   Requesting Scheduled Reports

SMT allows you to setup usage reports to be generated for a period of time. Scheduled reports will be run offline and delivered to your FTP folder.

The Daily 15-minute Intervals Usage Report and the Daily Meter Reads Report will be generated daily and provide the new 15 minute interval data each day for each specified customer. The Monthly Usage Report will be generated at the end of each calendar month.

- If a scheduled report end date is the same as an agreement end date, the scheduled report and agreement will expire on the same set date. If an agreement is extended, then the scheduled report end date will be aligned to new agreement end date automatically.
- If a scheduled report end date is modified by the Third Party to be less than the agreement end date, that scheduled report will expire on the set date before the agreement terminates.

- When a scheduled report end date is modified by the Third Party then that end date cannot be changed again in the future.
- After expiry of a scheduled report, there is no way to reschedule that same report or modify its end date., If a scheduled report is needed after its end date expires, its expiration may not be modified and a new report has to be scheduled.
- If a Third Party modifies the scheduled report end date and the agreement associated with that report is extended, that associated scheduled report end date will not be updated automatically to the new agreement end date. In this situation the third party will have to schedule a new report.
- Any time an agreement is terminated, the associated scheduled reports end dates will be aligned to the agreement termination date

NOTE: You can schedule usage reports for one (1) ESI ID at a time.

SMT Procedure – Setting Up Schedule Reports	
Step	Action
	NOTE: You must have a Customer Meter List displayed before you can complete the remaining steps. For information on displaying your Meter List, see Section 0 If you have an Energy Data Agreement established with your Customer, you will be able to access your Customer's usage data. There are three (3) types of Usage Data Reports available on SMT: - Daily Usage (15 min intervals) Report - Daily Meter Reads Report - Monthly Usage Report You may view or request exports of these reports online, create automated scheduled reports, or request exports via Application Programming Interfaces (API). Displaying Your Customer Meter List – Usage.
1	Select checkbox (required) Select the checkbox next to one or more Smart Meters, or select the checkbox next to the 'Search by Import' message.
2	Click 'Export Report(s)' button A new screen is displayed allowing you to select Report Options for this export.
Schedule Report Option:	

SMT Procedure – Setting Up Schedule Reports	
Step	Action
3	Daily Usage checkbox Select the checkbox to request that the Daily Usage (15 min intervals) report be generated for each of the previously selected Smart Meters. 🖍 NOTE: You may request one report or all 3 types of report at the same time.
4	Daily Usage Start Date (required if Daily Usage checkbox is selected) Enter a date, or use the Calendar Tool to select a date, that represents the beginning range of the usage data that you would like to see. Your Start Date cannot be prior to today's date.
5	Daily Usage End Date (required if Daily Usage checkbox is selected) By default End Date is set to agreement end date, End Date can also be edited to any date less than default agreement end date. Your End Date cannot be greater than agreement end date. Enter a date, or use the Calendar Tool to select a date, that represents when you want the schedule report to stop being executed. 🖍 NOTE: Usage data is retrieved from Smart Meters by the TDSP. SMT receives usage data 7-days/week from the TDSP companies. The data is made available through the SMT website within 24 hours of the last meter retrieval. For example, usage data through midnight on Monday is available by 12:01 AM on Wednesday.
6	Daily Meter Reads checkbox Select the checkbox to request that the Daily Meter Reads report be generated for each of the previously selected Smart Meters. 🖍 NOTE: You may request one report or all 3 types of report at the same time.
7	Daily Meter Reads Start Date (required if Daily Meter Reads checkbox is selected) Enter a date, or use the Calendar Tool to select a date, that represents the beginning range of the usage data that you would like to see. Your Start Date cannot be prior to today's date.

SMT Procedure – Setting Up Schedule Reports	
Step	**Action**
8	Daily Meter Reads end Date (required if Daily Meter Reads checkbox is selected) By default End Date is set to agreement end date, End Date can also be edited to any date less than default agreement end date. Your End Date cannot be greater than agreement end date. Enter a date, or use the Calendar Tool to select a date, that represents when you want the schedule report to stop being executed. 🖍 NOTE: Usage data is retrieved from Smart Meters by the TDSP. SMT receives usage data 7-days/week from the TDSPs. The data is made available through the SMT website within 24 hours of the last meter retrieval. For example, usage data through midnight on Monday is available by 12:01 AM on Wednesday.
9	Monthly Usage checkbox Select the checkbox to request that the Monthly Usage report be generated for each of the previously selected Smart Meters. 🖍 NOTE: You may request one report or all 3 types of report at the same time.
10	Monthly Usage Start Date (required if Monthly Usage checkbox is selected) Enter a date, or use the Calendar Tool to select a date, that represents the beginning range of the usage data that you would like to see. Your Start month cannot be prior to the current month.
11	Monthly Usage End Date (required if Monthly Usage checkbox is selected) By default End Date is set to the month same as agreement end month, End Date can also be edited to any month less than default agreement end month. Your End month cannot be greater than agreement end month. Enter a date, or use the Calendar Tool to select a date, that represents when you want the schedule report to stop being executed.
12	Click 'Export' button A new screen will display showing an Order Number for your report request. Your request will be run offline. When the request completes, your scheduled report will be delivered to your FTP folder. For information on retrieving your report, see Section 8.4.3 Retrieving Exported Reports.

Figure 59: SMT Procedure – Setting Up Schedule Reports

8.4.3   Retrieving Exported Reports

If you have submitted a Report Request that will run offline, when the report is completed, Green Button type reports will be sent via email to the Email Address in your Account Profile and Adhoc type reports will be sent to your FTP folder.

You can view the status of your Report Requests at any time. Go to the Usage Tab and Select Report Request Status from the left menu. Figure 60 shows an example of a Report Request Status screen. Following are the potential Report Request status values:

- Processing – Your request is still in process.

- Unsuccessful – Your request could not be processed. This is likely due to a temporary system or internet problem. Submit your request again. If you continue to receive this status, then refer to Section 11 Additional Help for information on how to contact the SMT Team.

- Complete – Your request is complete and the results are ready for download.

🖉 NOTE: The Details section of the Report Request Status screen will display a message if no data was found that matched the Report Options in your Report Request. This may happen, for example, if your selected date range is for a period prior to the installation of the Smart Meter.

Figure 60: Report Request Status Screen

The results of your completed report request is sent to your email for Green Button type reports and to your FTP folder for Adhoc type reports typically within a few minutes. Please work with your internal IT group if you need assistance to retrieve and distribute the files that are delivered to the FTP folder only.

9   Managing In-Home Devices

An In-Home Device, also known as a Home Area Network (HAN) Device, displays usage information and/or receives informational messages and commands from Third-Party Service Providers. These devices may help Customers manage and control energy consumption. Examples of In-Home Devices include in-home displays, programmable communicating thermostats, and smart appliances.

You need to have an Active In-Home Device Agreement in order to add or remove an In-Home Device to your Customer's Smart Meter.

NOTE: Only Company Administrators or Authorized Users with In-Home Device Services permission are allowed to access In-Home Devices functions.

9.1   Viewing In-Home Device Details

To view the information of a specific In-Home Device, you must first select the In-Home Device Agreement from the Customer Agreement List. See Section 6.1 Displaying Your Customer Agreement List – My Account.

SMT Procedure – Viewing In-Home Device Details	
Step	Action
	NOTE: You must first select the desired In-Home Device Agreement from your Customer Agreement List and display the Agreement on your View & Edit Customer Agreement screen before you can complete the following step. Refer to Section 6.1 Displaying Your Customer Agreement List to learn how to search for your Agreement.
1	Click 'View In-Home Device Details' button A new screen will display the following information of the In-Home Device associated with the Agreement: ▪ In-Home Device MAC Address and Installation Code ▪ Current status of the In-Home Device Agreement and In-Home Device Services Agreement associated with the device ▪ History of the In-Home Device: the times and dates of the status related to any add, re-add, or remove request.

Figure 61: SMT Procedure – View In-Home Device Details

Figure 62: View In-Home Device Details

Every time a request is made to add, re-add, or remove an In-Home Device, the status history of the request will be shown in the In-Home Device History section of this screen. This information is stored for up to 13 months.

Figure 63 defines the various status messages that may show on your In-Home Device History.

In-Home Device Status Values	
Status	Status Description
Add Acknowledged	A request to Add this In-Home Device was sent by the Customer or by the Third-Party Service Provider and has been received by SMT.
Add Pending	The Add request has been sent by SMT and has been received by the TDSP.
Meter Ready	The Smart Meter is ready to communicate with the In-Home Device. The In-Home Device is ready for action. You should advise your Customer to press the button on the In-Home Device to establish communication between their device and the Smart Meter. Review the manufacturer's instructions for the In-Home Device to complete the Add Process.
Device Added	The In-Home Device has been successfully Added and is ready to display usage or receive messages. NOTE: Functionality varies by In-Home Device. Please consult the manufacturer's guide for the specific In-Home Device to learn more about the specific functions.

In-Home Device Status Values	
Status	**Status Description**
Add Failed	The request to Add an In-Home Device has failed. You may try to Add the Device again.
Remove Acknowledged	A request to Remove this In-Home Device was received by SMT.
Remove Pending	The Remove request has been sent by SMT and received by the TDSP.
Device Removed	The In-Home Device has been successfully Removed and can no longer receive messages. NOTE: Removing the In-Home Device from SMT does not physically remove the device from the property. It simply causes the communication link between the In-Home Device and the Smart Meter to be removed.
Remove Failed	The request to Remove an In-Home Device has failed. You may try to Remove the Device again.

Figure 63: In-Home Device Status Values

9.2   Re-Adding In-Home Device

You need to establish an In-Home Device Agreement with your Customer to add a new In-Home Device to your Customer's Smart Meter. If you or your Customer removed the device from your Customer's Smart Meter without terminating the In-Home Device Agreement, or if the In-Home Device was not added to your Customer's Smart Meter successfully, you may re-add the In-Home Device to your Customer's Smart Meter.

NOTE: The In-Home Device Agreement will remain active without an In-Home Device for thirty (30) calendar days. Once it expires, you will not be able to re-add the In-Home Device to the Agreement. A new Agreement will be needed.

SMT Procedure – Re-Add an In-Home Device	
Step	**Action**
NOTE: You must first select the desired In-Home Device Agreement from your Customer Agreement List and display the Agreement on your View & Edit Customer Agreement screen before you can complete the following step. Refer to Section 6.1 Displaying Your Customer Agreement List to learn how to search for your Agreement.	

SMT Procedure – Re-Add an In-Home Device	
Step	Action
1	Click 'Re-Add In-Home Device' button

You will receive a confirmation on the screen that your request to re-add the In-Home Device associated with the Agreement has been submitted.

🖊 NOTE: Re-add In-Home Device is only available if the Agreement Status is 'Active'.

🖊 NOTE: You can only re-add the same In-Home Device that was originally associated with the In-Home Device Agreement. |

Figure 64: SMT Procedure – Re-Add an In-Home Device

The process to add an In-Home Device to a Smart Meter may take some time. You may check the status of the In-Home Device by Viewing the In-Home Device details. Some devices require you to take action (e.g., press a button on the device) for the process to be completed. If the status of your In-Home Device in SMT is Meter Ready, check the installation guide of your In-Home Device and follow the instructions to complete the process. The process is complete when the status of your In-Home Device in SMT is Device Added.

9.3   Removing In-Home Devices

You or your Customer may only remove an In-Home Device through SMT if it is associated with an Active In-Home Device Agreement.

SMT Procedure – Removing In-Home Devices	
Step	Action
	🖊 NOTE: You must first select the desired In-Home Device Agreement from your Customer Agreement List and display the Agreement on your View & Edit Customer Agreement screen before you can complete the following steps. Refer to Section 6.1 Displaying Your Customer Agreement List to learn how to search for your Agreement.
1	Click 'Remove In-Home Device' button

🖊 NOTE: Remove In-Home Device is only available if the Agreement Status is 'Active'. |
| 2 | Do you wish to keep the In-Home Device Agreement or terminate it? (required)

Choose whether you want to keep or terminate the Agreement before you confirm the removal. |

SMT Procedure – Removing In-Home Devices	
Step	Action
3	Click 'Continue' button A new screen will display; this screen shows the In-Home Device selected to be removed.
4	Reason for Removing (required) Select the removal reason from the dropdown box.
5	Comments You may provide optional comments.
6	Terms and Conditions (required) Check the box to confirm that you have read and agreed to the Terms and Conditions,
7	Click 'Remove In-Home Device' button You will receive a confirmation on the screen that your request to remove the In-Home Device associated with the Agreement is submitted.

Figure 65: SMT Procedure – Removing In-Home Devices

The process to remove an In-Home Device from your Customer's Smart Meter may take some time. You may check the status of the In-Home Device by Viewing the In-Home Device details. The Remove In-Home Device process is complete when the status of your In-Home Device in SMT is Device Removed.

9.4   Sending Messages to In-Home Devices

There is currently no method for sending messages to In-Home Devices via the web user interface. You can only send messages to In-Home Devices using an SMT API.

You or your IT group should receive the API documentation when you first register for FTP and web services access to SMT. Contact the SMT Help Desk if you have questions using the APIs.

You can request a copy of the In-Home Device Message Log to see what messages have been sent using the API. See Section 9.5 Requesting the In-Home Device Message Log.

9.5   Requesting the In-Home Device Message Log

The In-Home Device Message Log is a file that provides information regarding the status of messages sent to In-Home Devices through the Messaging API.

NOTE: If you do not have any In-Home Device Services Agreements, you can access this screen but no data will be displayed.

SMT Procedure – Requesting the In-Home Device Message Log	
Step	Action
1	Navigate to the 'My Account' tab
2	Select 'In-Home Device Messages' from the left menu
3	Message Type (required) Select one or more message types to include on the report.
4	Date of Message (required) Select a date using the calendar tool. This is the date that the message was sent to SMT using your API.
5	Click 'Submit Request ' button A new screen will display showing an Order Number for your report request. Your request will be run offline. When the request completes, an email will be sent to the Email Address in your Account Profile. For information on retrieving your report, see Section 8.4.3 Retrieving Exported Reports.

Figure 66: SMT Procedure -- Requesting the In-Home Device Message Log

Figure 67: Request In-Home Device Message log

Figure 68 shows the data that is included in the In-Home Device Message Log.

In-Home Device Message Log Content	
COLUMN NAME	DESCRIPTION
TDSPDUNSNumber	TDSP DUNS Number
MessageDate	Date the Message Request was sent to the SMT through the API
RequestID	Message Request ID. This is a unique Request ID generated by the SMT. You received this Request ID when you submitted the Message request through the API
MessageCancelationID	Message Cancellation Request ID. This is a unique Request ID generated by the SMT. You received this Request ID when you submitted the Message Cancellation Request through the API (this field is only available for Event Categories CLE, CAL and CSM)
MessageStatusID	Message Status ID. This is a unique Message ID generated by the SMT
ESIID	ESI ID (Electric Service Identifier)
MeterSerialNumber	Meter Serial Number (this will be empty)
DeviceMACAddr	In-Home Device MAC Address (this field is populated when status is available at the Device level)
EventCategoryID	Event Category. Possible values are: PRM: Price Message LCE: Load Control Event CLE: Cancel Load Control Event CAL: Cancel All Load Control Events STM: Simple Text Message CSM: Cancel Simple Text Message
StatusCode	Message Status Code. Possible values are: RQA: Request Accepted and sent to TDSP ACK: Acknowledgment from TDSP that the message request has been received PEN: Pending STR: Event Started CON: Confirmed Delivery OPT: Opt Out FLR: Delivery Failure
StatusDesc	Message Status Description
StatusTimestamp	Message Status Time Stamp

Figure 68: In-Home Device Message Log Content

10 Supporting Your Customers

The SMT user experience is somewhat different for Customers than it is for Third-Party Service Providers. For example, Customers must add their Smart Meters to their accounts by using the ESI ID and Meter Number showing on the bill. As a Third-Party Service Provider, you will gain access to your Customer's Smart Meter by establishing an Agreement with your Customer.

10.1 Verifying Your Customer's Meter Information

SMT only has data for Smart Meters. Many Customers believe that they have Smart Meters yet receive errors when attempting to register for a SMT account. The most common reasons for the errors are:

- The Customer does <u>not</u> have a Smart Meter. A meter with a digital display is not necessarily a Smart Meter.

- A Smart Meter has been installed at the Customer location but it has not yet been provisioned by the TDSP. The provisioning process by the TDSPs can take up to 60 days after installation. The Smart Meter is not available in SMT until after the provisioning period.

If your Customer has problems attaching a Smart Meter to their SMT account, refer the Customer to their REP of Record (ROR) for assistance.

10.2 Removing a Smart Meter from a Customer Account

Your Customer claims a Smart Meter by adding the meter to their SMT account. The Customer provides the ESI ID and Meter Number found on the electric bill to add the Smart Meter. SMT will only allow a Smart Meter to be attached to a single SMT Customer Account at any given time.

If a Customer tries to attach a Smart Meter that is already attached to another account, the Customer will get an error message and will be instructed to call their REP of Record (ROR) for assistance.

If your Customer's ROR has determined that the Smart Meter is being attached to an SMT Customer Account incorrectly, their ROR will coordinate with the TDSP to remove the meter from the current SMT Customer Account. When the TDSP takes this action, the SMT Customer who is losing the Smart Meter will be notified via email. As soon as the Smart Meter is released, the rightful Customer may attach the Smart Meter to their SMT account or may register for a SMT account using the Smart Meter in question.

11 Additional Help

Most SMT web pages have page help available. Look for the Help icon ⑦ near the top of the page. Clicking this icon will display page help for the current page.

Most SMT fields and labels contain tool tips. Roll your mouse over the field or label to see the tool tip. Figure 69 shows an example of a displayed tool tip.

Personal Information

* First Name:	
Middle Initial:	You must provide your first name.
* Last Name:	
Suffix:	

Figure 69: Tool Tip Display

Frequently asked questions and other helpful information can be found by selecting the Help tab.

If you need additional Help with the SMT website, contact the SMT Team at 888-616-5859.

Appendix A: Working with CSV Files

CSV, or Comma Separated Values, represents a specific text file format in which the fields in a record are separated by a comma. All Import and Export functions in SMT require the use of CSV formatted files.

A.1   Creating a CSV File for Import

Two of the most common tools for creating CSV files are Windows Notepad and MS-Excel.

Before creating your CSV file, you will need to know which fields to enter. If you will be using your Import file to add Smart Meters to your Account, you will need both ESI ID and Meter Number for each Smart Meter that you wish to add. If you will be using your Import file to create reports for your Smart Meters, then you will need either the ESI IDs or the Meter Numbers to be selected, but not both.

A.1.1   Creating a CSV File using Windows Notepad

Open Windows Notepad on your computer.

✎   NOTE: On most computers, Windows Notepad can be found by pressing the Start button, selecting 'All Programs', and then selecting 'Accessories'.

Type directly into the open text area. Use a comma to separate fields. Use the Enter key to separate rows. Each Smart Meter in your CSV file should be in a separate row. Do not include any headers, text, or other information in the file.

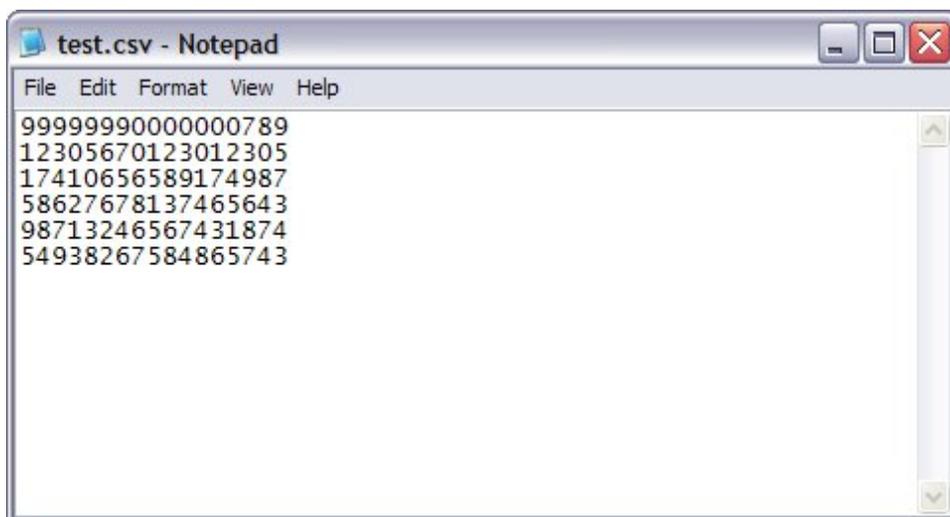Figure 70 shows an example of CSV files created in Windows Notepad.

Figure 70: Sample Notepad CSV – Import for Adding Meters or Reporting by ESI ID

Save your file and exit Windows Notepad when you finish entering your data.

![pencil icon] NOTE: Windows Notepad will automatically save your file with a file extension of TXT. SMT requires Import files to have a file extension of CSV. You must rename your file after saving with Windows Notepad so that it ends in CSV.

Test.txt must be renamed to Test.csv

A.1.2   Creating a CSV File using MS-Excel

Open MS-Excel on your computer.

Each Smart Meter in your file should be in a separate row. Each field should be in a separate column. Do not include any headers, text, or other information in the file.

![pencil icon] NOTE: Excel has a limitation of 15-digits for cells formatted as Number. Excel will use exponential notation for numbers greater than 12-digits for cells formatted as General. Because ESI IDs contain 17-digits, any Excel cell where you will type an ESI ID must first be formatted as 'Text'.
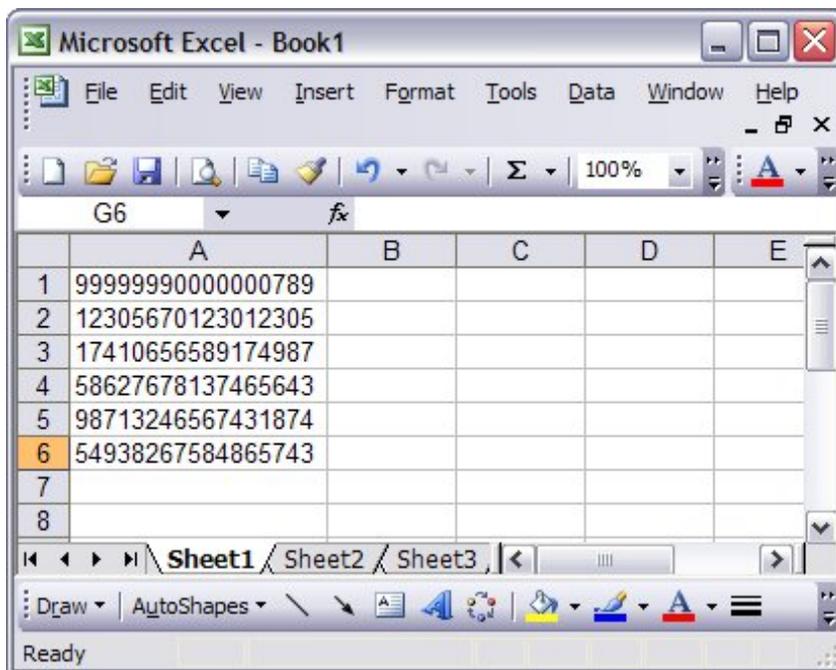
Figure 71 shows an example of MS-Excel file.

Figure 71: Sample Excel CSV – Import for Adding Meters or Reporting by ESI ID

When you are finished entering your data, save your file as a CSV file by selecting the CSV in the 'Save as type' field as show in Figure 72.
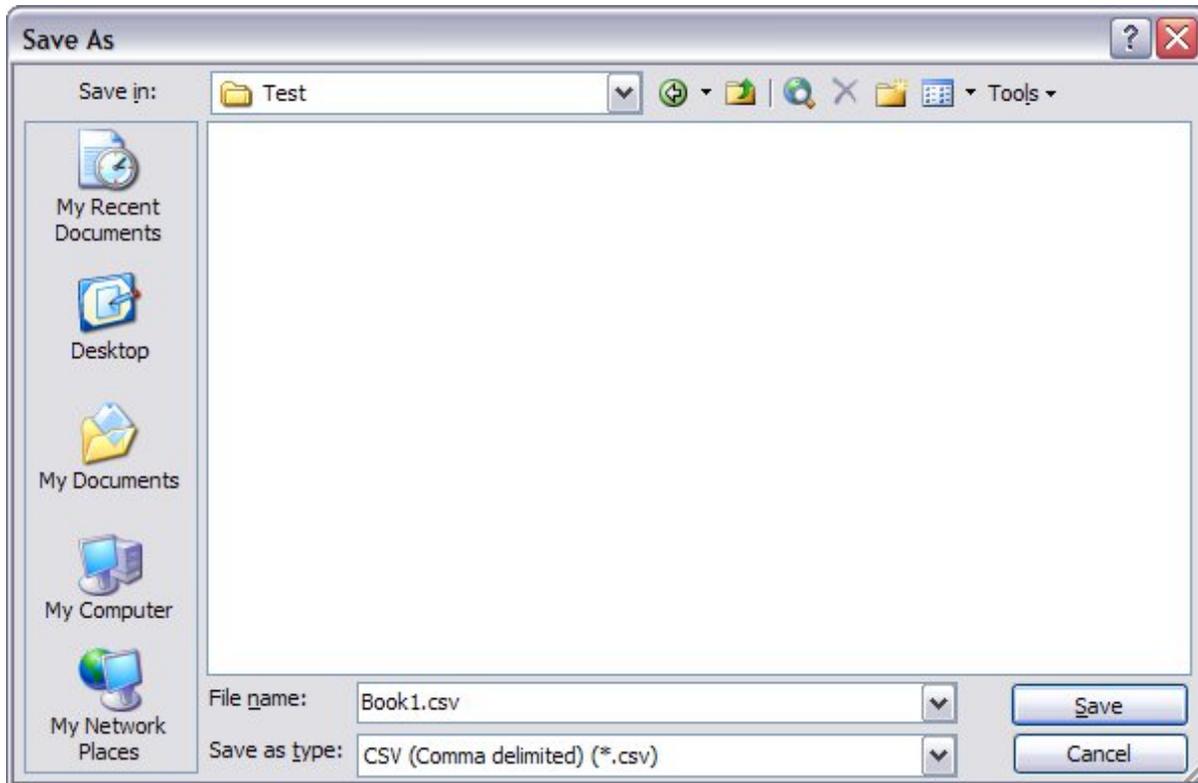

Figure 72: Excel Save as type CSV

🖉 NOTE: When Excel saves to the CSV file type, it does not save the cell format. If you re-open the file that you just created, Excel will default the cell formatting to the General format. For cells formatted as General, Excel will use exponential notation for numbers greater than 12-digits. Because ESI IDs contain 17-digits, your ESI IDs will not display correctly. For more information, see Appendix A.2 Opening a CSV File.

A.2   Opening a CSV File

Reports and files that are exported or downloaded from SMT are in CSV format. Since CSV files are specially formatted text files, they can be opened by any text-based application, like Windows Notepad.

CSV files can also be opened by MS-Excel. However, Excel will default the cell formatting to the General format. For cells formatted as General, Excel will use exponential notation for numbers greater than 12-digits. Because ESI IDs contain 17-digits, your ESI IDs will not display correctly if you simply open the CSV file using Excel.

To properly display all fields, you must use the Excel 'Import External Data' feature which can be found under Data on your Excel toolbar, as show in Figure 73.
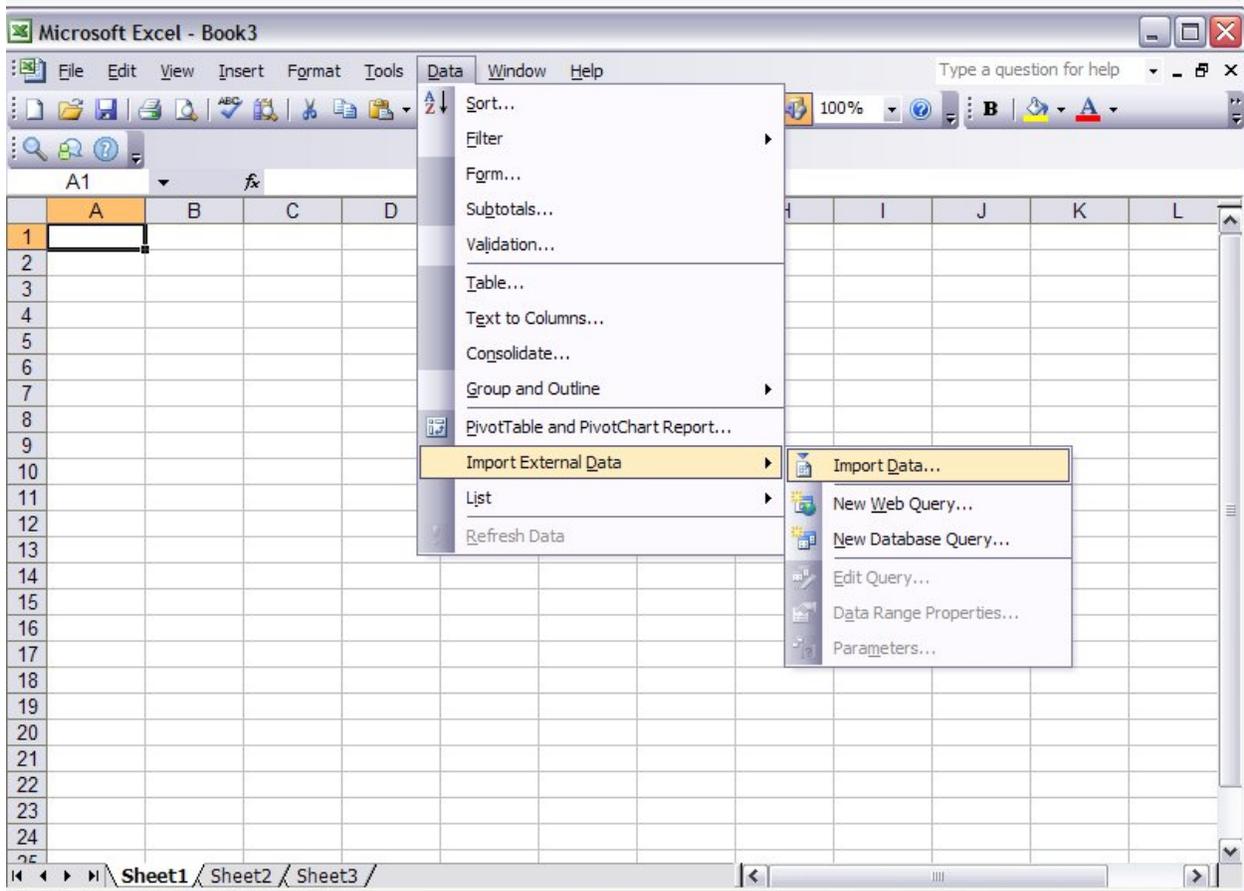
Figure 73: Excel Import External Data

Select the CSV file to be opened as your Source Data file. This action will initiate the Excel Text Import Wizard. In Step 1 of 3 of the Text Import Wizard, verify that 'Delimited' is selected, as shown in Figure 74, and Click Next.
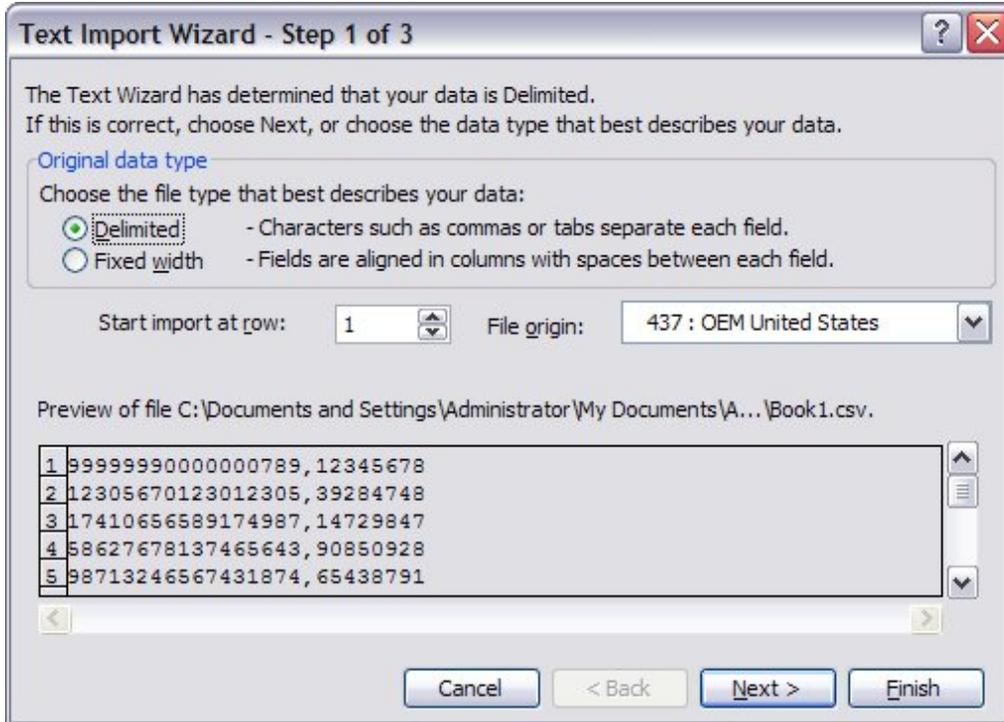
Figure 74: Excel Text Import Wizard – Step 1 of 3

In Step 2 of 3 of the Text Import Wizard, verify that 'Comma' is selected, as shown in Figure 75, and Click Next.

Figure 75: Excel Text Import Wizard – Step 2 of 3

In Step 3 of 3 of the Text Import Wizard, select the column header of any column containing ESI IDs, change the column data format to 'Text', as shown in Figure 76, and Click Finish.
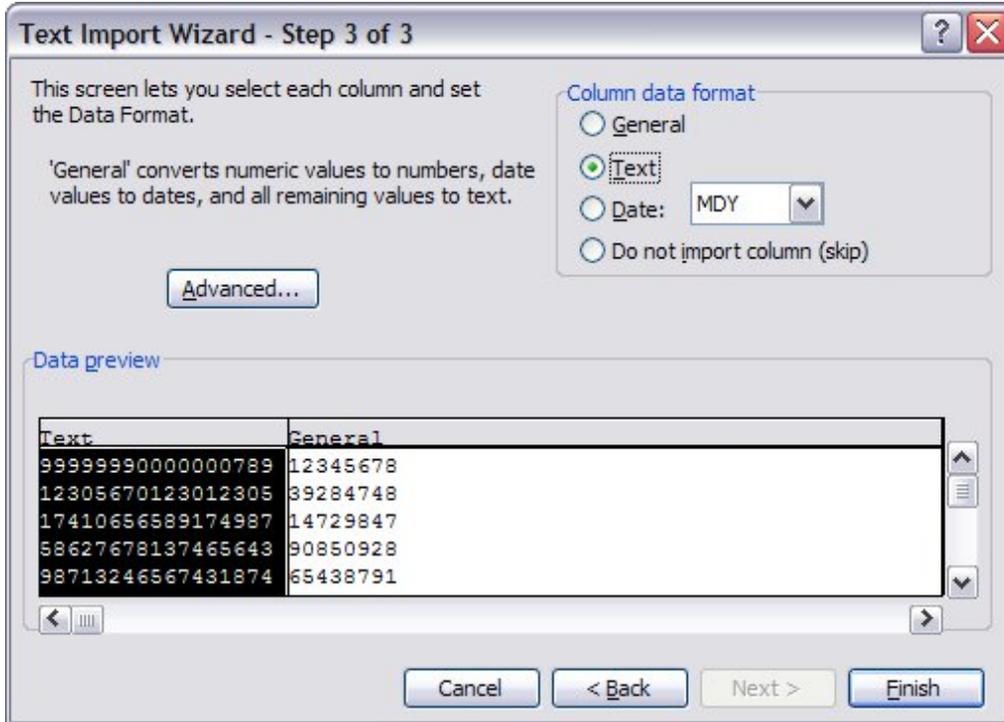

Figure 76: Excel Text Import Wizard – Step 3 of 3

Appendix B: Glossary

The following terms and acronyms are commonly used by SMT or in the Texas competitive electric market.

Term	Definition
AMS	Advanced Metering Solutions
API	Application Program Interface
Authenticated user	Users who have already logged in with their UserID and password.
CSV	Comma Separated Values – a common file format in which the data is presented as a list of fields that are separated by commas. CSV files are typically opened with an application or spreadsheet software, such as MS-Excel.
Company Administrator	An employee or representative of a Company that is assigned the role and responsibility to manage (grant and revoke) permissions of Accounts having SMT access to the Smart Meters associated with the Company.
ERCOT	Electric Reliability Council of Texas that operates the electric grid and manages the deregulated market for 75 percent of the state of Texas.
ESI ID	Electric Service Identifier, a unique identifier for the point of electric delivery to a consumer.
FAQ	Frequently asked questions
HAN	Home Area Network – this is the network between the advanced meter and the In-Home Device as mentioned in the AMS rules
LSE	Standard file format used in the Texas competitive electric market for interval data files.
PUCT	Public Utility Commission of Texas
REP	Retail Electric Provider
ROR	REP of Record
SMT	Smart Meter Texas
TDSP	Transmission and Distribution Service Provider, also known as the TDSP
Unauthenticated user	Users who have not yet logged in with their UserID and password.
ZigBee	Communication protocol used with In-Home Devices