

# Customer Web Enrollment Guide



## TEXAS RESIDENTIAL ENERGY

Get a firsthand look at the residential enrollment experience for customers in Texas. Keep in mind, as a Kynect Independent Associate, you can guide a prospective customer through the online enrollment process, but you can't do it for them due to regulatory laws.

### Gather Information Before Starting Enrollment

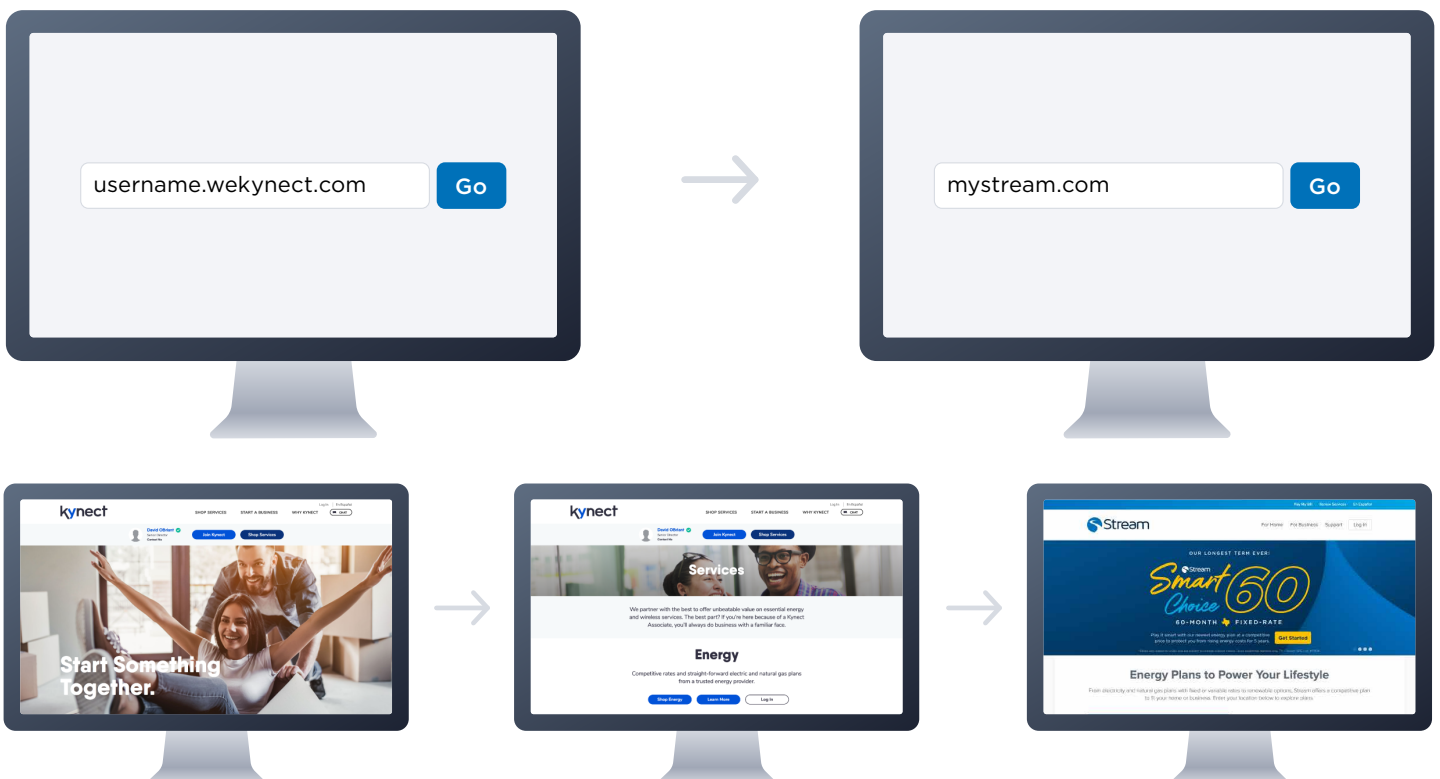
When your customer is ready to sign up for a Stream energy plan, you may want to encourage them to gather the information in this checklist to ensure they have a streamlined experience.

#### Checklist

- ☒ Service Address
- ☒ Service Start Date (Move-In Only)
- ☒ Social Security Number
- ☒ Referring Kynect Associate's ID Number (A-Number)  
FOR CUSTOMERS WHO START ON MYSTREAM.COM OR PHONE ENROLLMENT
- ☒ Debit or Credit Card
- ☒ Email Address

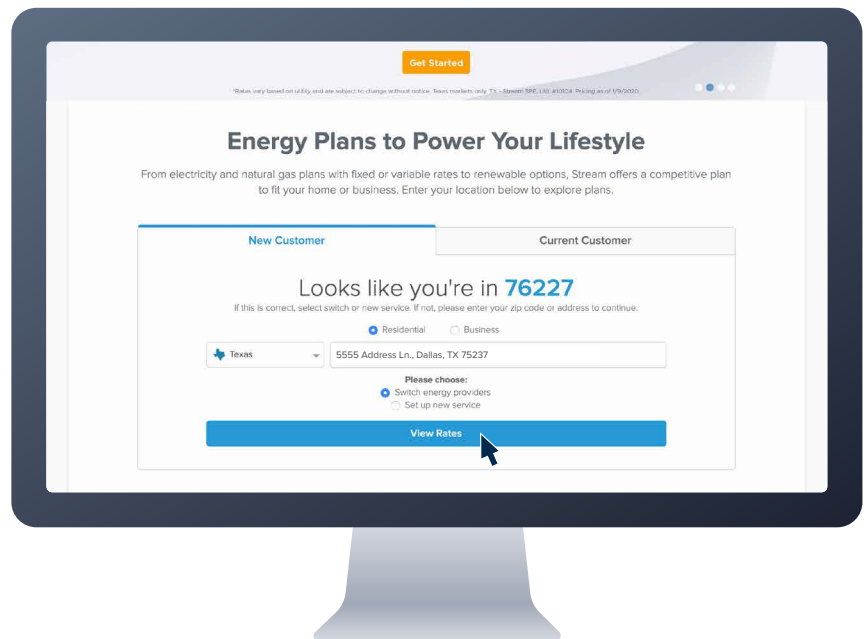
### How to Enroll Online from mystream.com

- 1 To start, your customer will go to mystream.com through your Homesite or web browser.



**2** Once your customer scrolls down, they'll find the rates exploration module, which is preset to their current location. Then, under the New Customer tab, your customer will:

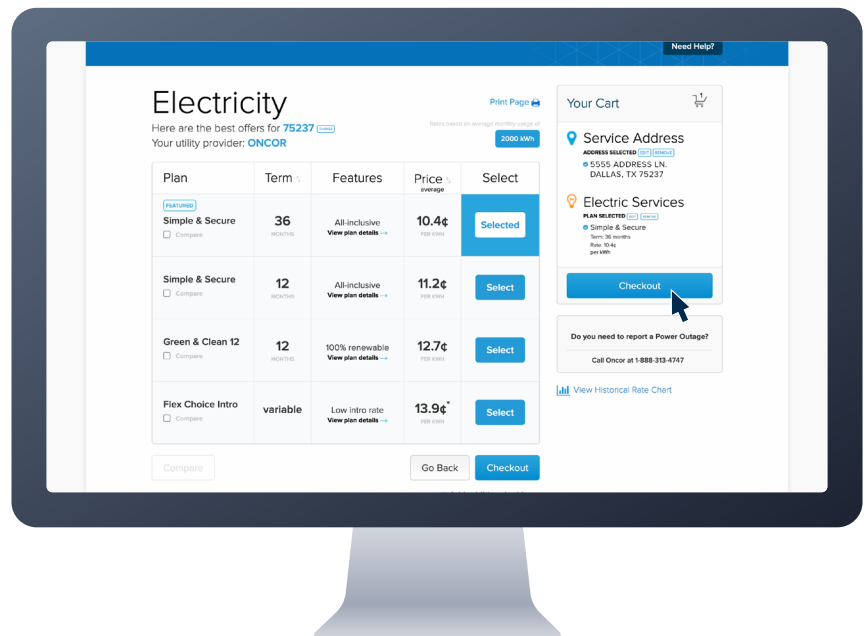
- ✓ Select **Residential** service
- ✓ Click the drop-down list to **select their State**
- ✓ Enter the **Service Address**
- ✓ Choose **Switch Energy Providers** or **Set Up New Service**
- ✓ Click the **View Rates** button



**3** Here, your customer can browse all the plans available at the service address. Remember, prices are based on 2,000 kWh monthly usage.

- ✓ Compare two plans by clicking the **check boxes** under the plan names
- ✓ Click **View Plan Details** to see plan features, the rate breakdown and important documents like the Electricity Facts Label, to view price based on usage less than 2,000 kWh per month

Your customer can click the **Select** button to choose their new plan. Then, click the **Checkout** button to continue enrollment.

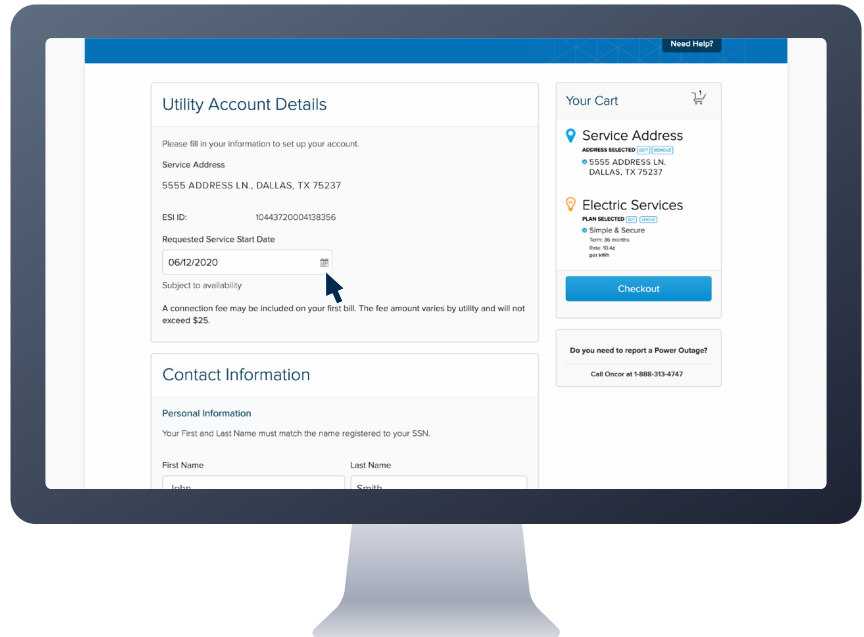


- 4** Next, your customer should review their Utility Account Details and double check the Service Address for accuracy.

For a new move-in, your customer can click the **calendar icon** to select their Service Start Date.

*Please note, if your customer selects a start date within 1-3 days, there may be a fee.*

Switching providers usually will process in 2-5 days.

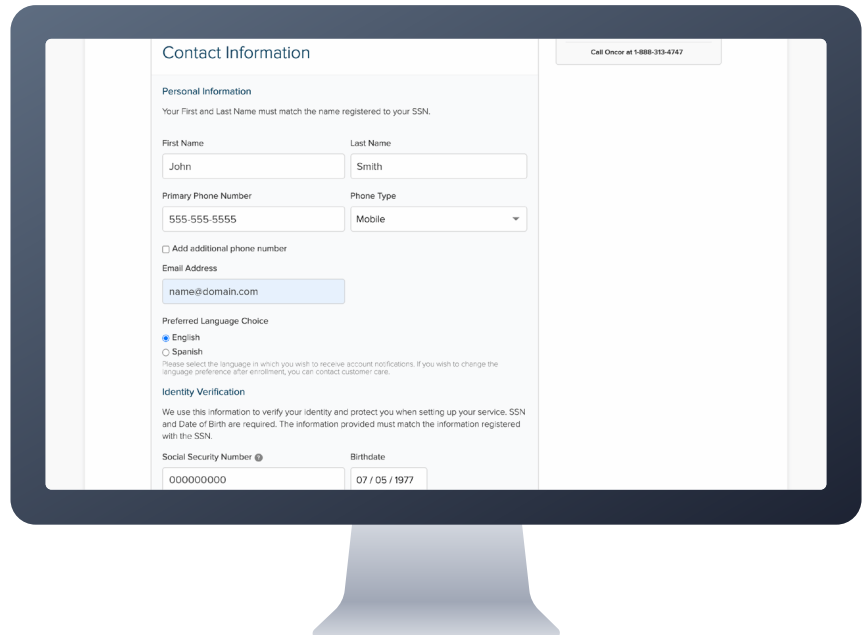


The screenshot shows the 'Utility Account Details' section with fields for Service Address (5555 ADDRESS LN., DALLAS, TX 75237), ESI ID (10443720004038356), and Requested Service Start Date (06/12/2020). A calendar icon is visible next to the date field. The 'Your Cart' section on the right shows the Service Address and Electric Services (Simple & Secure, 12 months, \$10.00 per kWh) with a 'Checkout' button. A 'Need Help?' link is in the top right corner.

- 5** Then, on the same page, your customer will fill out their Contact Information, including:

- ✓ Name
- ✓ Phone Number
- ✓ Email Address
- ✓ Preferred Language
- ✓ Social Security Number
- ✓ Birthdate
- ✓ Mailing Address, if it's different from the Service Address

Your customer will click the drop-down list to choose their **Previous Provider**, if they are switching.

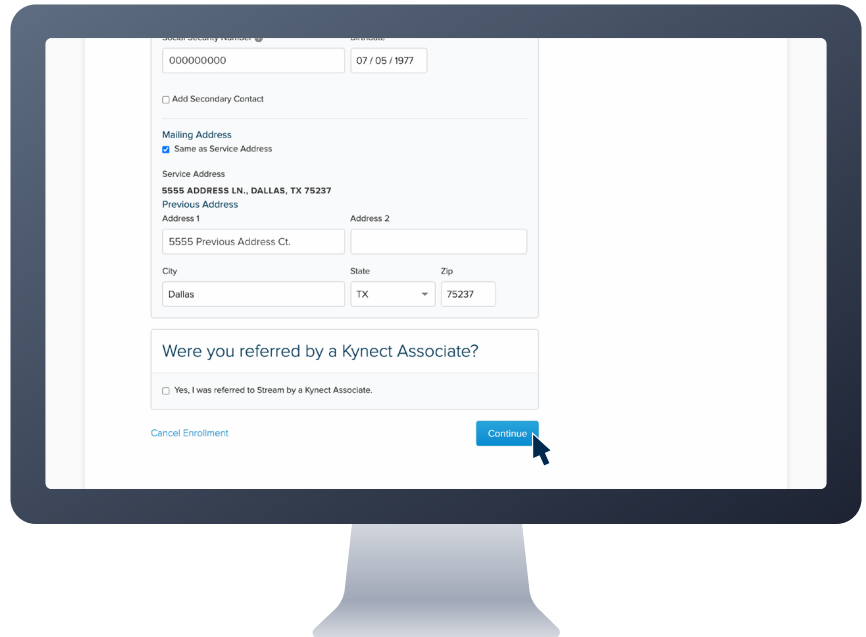


The screenshot shows the 'Contact Information' section with fields for First Name (John), Last Name (Smith), Primary Phone Number (555-555-5555), and Phone Type (Mobile). There is an option to 'Add additional phone number' and an 'Email Address' field (name@domain.com). The 'Preferred Language Choice' section has radio buttons for English (selected) and Spanish. The 'Identity Verification' section includes fields for Social Security Number (000000000) and Birthdate (07 / 05 / 1977). A 'Call Oncor at 1-888-353-4747' link is in the top right corner.

- 6 If your customer did not come from your Homesite, they will need to enter the referring **Kynect Associate's ID Number**, also known as the A-Number.

***This will auto-populate if the customer started at the Associate's Homesite.***

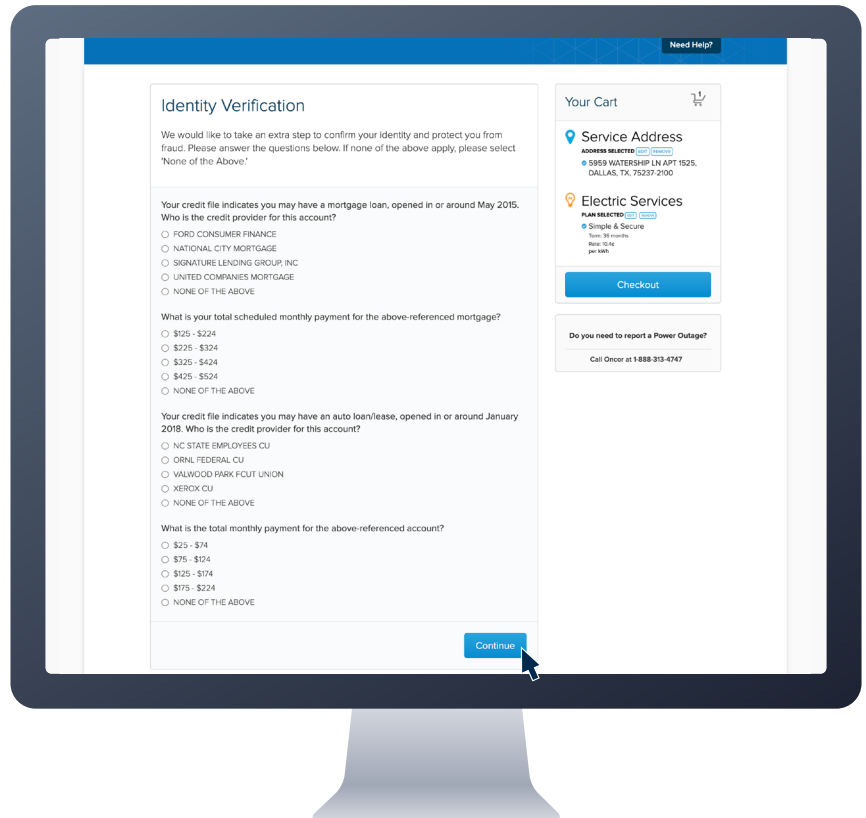
Then, your customer will click **Continue** at the bottom right.



- 7 Next, your customer will answer Identity Verification questions, if applicable, by clicking the **correct answers**.

Once the questions are complete, your customer will click **Continue** at the bottom right.

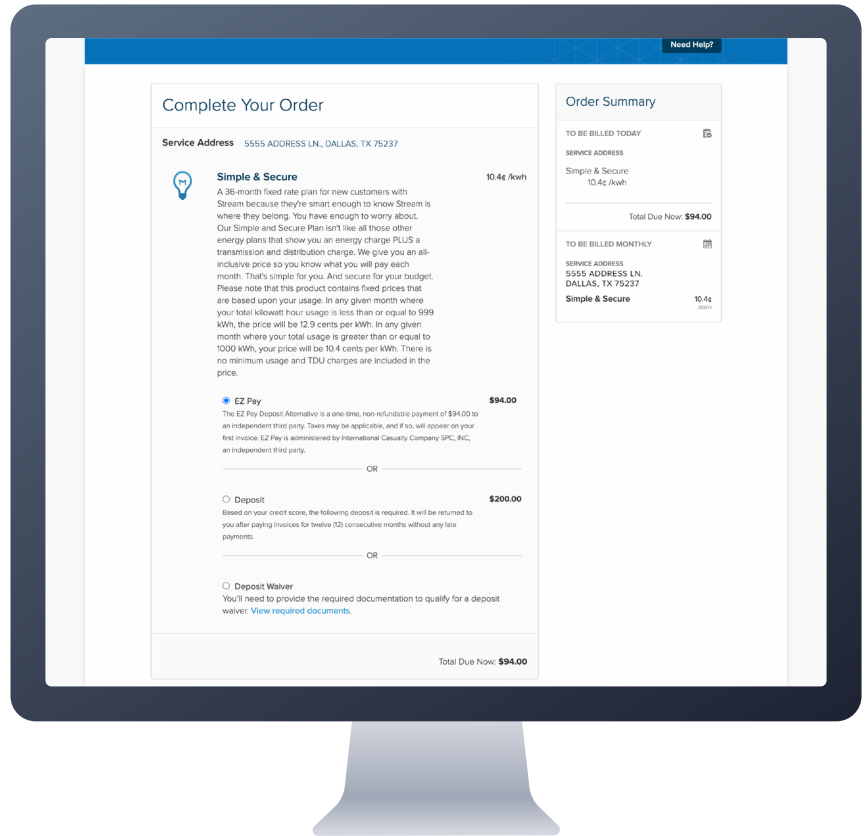
**Note:** If verification fails, your customer will receive an Action Required email instructing them to send identification documents to Stream. See the list of valid documents at [mystream.com/service-requirements](http://mystream.com/service-requirements).



**8** Your customer should review their order to ensure all information and plan details are accurate.

**9** If a deposit is required, based on a soft credit check, your customer can select a **deposit option**.

See the full list of deposit options at [mystream.com/deposits](https://mystream.com/deposits).



**Complete Your Order**

Service Address: 5555 ADDRESS LN., DALLAS, TX 75237

**Simple & Secure** 10.4¢/kwh

A 36-month fixed rate plan for new customers with Stream because they're smart enough to know Stream is where they belong. You have enough to worry about. Our Simple and Secure Plan isn't like all those other energy plans that show you an energy charge PLUS a transmission and distribution charge. We give you an all-inclusive price so you know what you will pay each month. That's simple for you. And secure for your budget. Please note that this product contains fixed prices that are based upon your usage. In any given month where your total kilowatt hour usage is less than or equal to 999 kWh, the price will be 12.9 cents per kWh. In any given month where your total usage is greater than or equal to 1000 kWh, your price will be 10.4 cents per kWh. There is no minimum usage and TDU charges are included in the price.

**EZ Pay** \$94.00

The EZ Pay Deposit Alternative is a one time, non-refundable payment of \$94.00 to an independent third party. Taxes may be applicable, and this will appear on your first invoice. EZ Pay is administered by International Casualty Company SPC, INC, an independent third party.

OR

☐ **Deposit** \$200.00

Based on your credit score, the following deposit is required. It will be returned to you after paying invoices for twelve (12) consecutive months without any late payments.

OR

☐ **Deposit Waiver**

You'll need to provide the required documentation to qualify for a deposit waiver. [View required documents.](#)

Total Due Now: \$94.00

**Order Summary**

TO BE BILLED TODAY

SERVICE ADDRESS  
Simple & Secure  
10.4¢/kwh

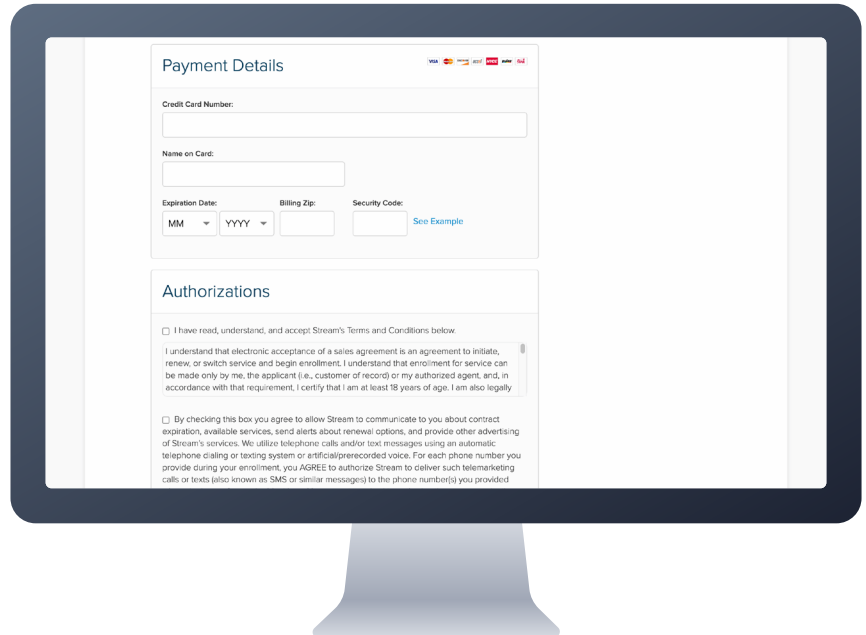
Total Due Now: \$94.00

TO BE BILLED MONTHLY

SERVICE ADDRESS  
5555 ADDRESS LN.  
DALLAS, TX 75237  
Simple & Secure  
10.4¢/kwh

**10** If your customer chooses to pay their deposit requirement at enrollment, they will need to enter their valid credit or debit card **Payment Details**.

**Note:** If any issues come up with the payment, your customer will be asked to call Customer Support to complete their enrollment.



**Payment Details**

Credit Card Number:

Name on Card:

Expiration Date:   Billing Zip:  Security Code:  [See Example](#)

**Authorizations**

☐ I have read, understand, and accept Stream's Terms and Conditions below.

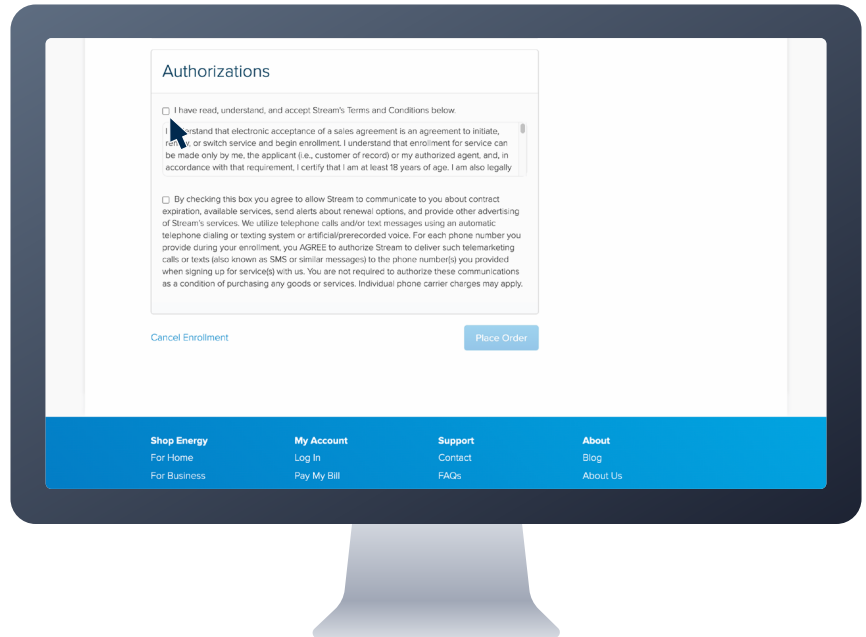
☐ I understand that electronic acceptance of a sales agreement is an agreement to initiate, renew, or switch service and begin enrollment. I understand that enrollment for service can be made only by me, the applicant (i.e., customer of record) or my authorized agent, and, in accordance with that requirement, I certify that I am at least 18 years of age. I am also legally

☐ By checking this box you agree to allow Stream to communicate to you about contract expiration, available services, send alerts about renewal options, and provide other advertising of Stream's services. We utilize telephone calls and/or text messages using an automatic telephone dialing or text messaging system or artificial prerecorded voice. For each phone number you provide during your enrollment, you AGREE to authorize Stream to deliver such telemarketing calls or texts (also known as SMS or similar messages) to the phone number(s) you provided

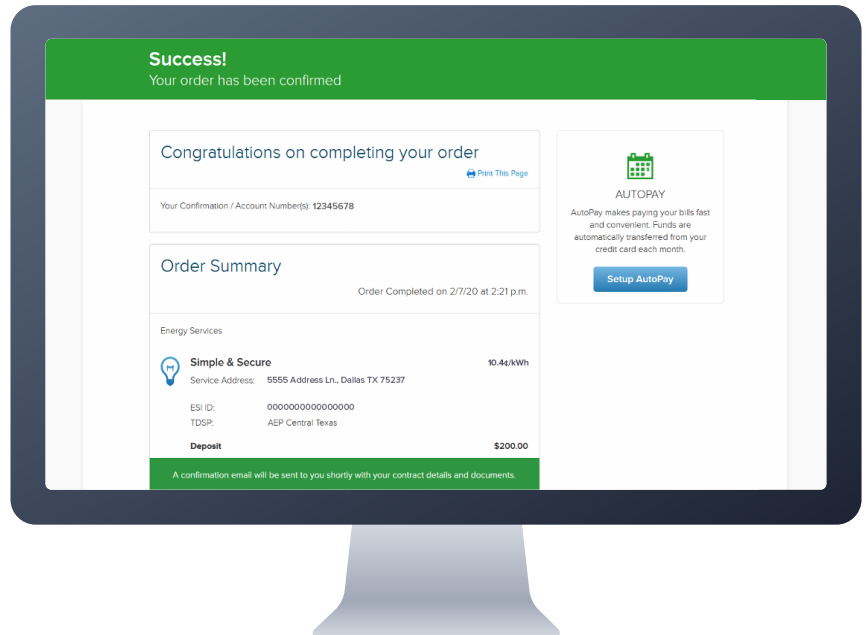
- 11** Your customer must read and click the **check box** to authorize that they understand and accept **Stream's Terms and Conditions**

To receive communications from Stream about account information and promotions, your customer will need to click the second **check box**.

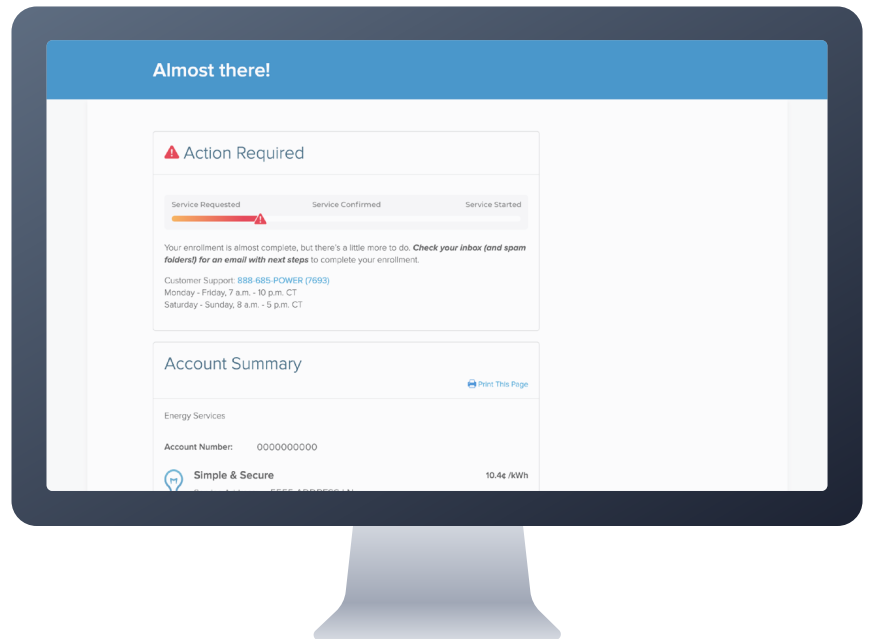
Finally, to submit their enrollment, your customer will click **Place Order** on the bottom right.



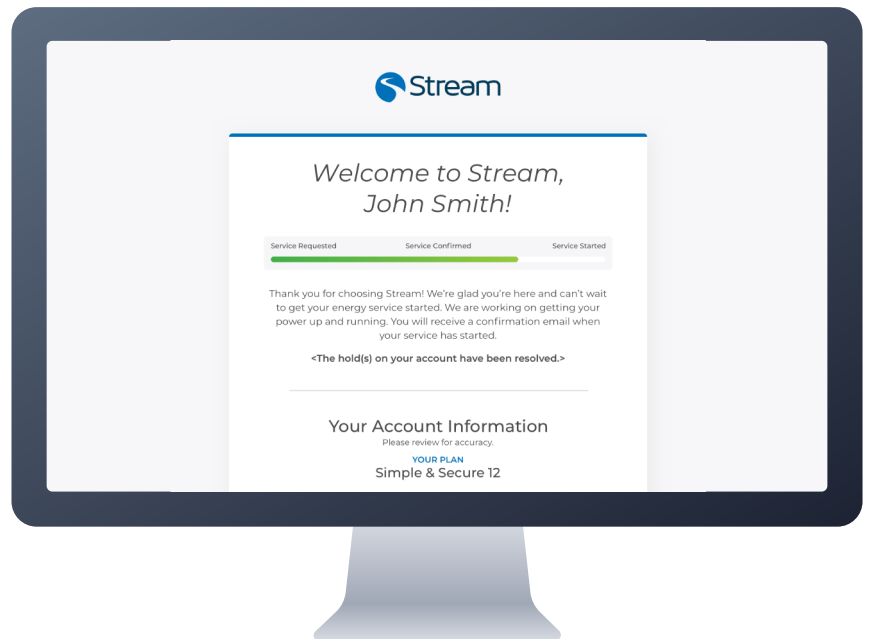
- 12** If enrollment is successful, your customer will receive a confirmation screen showing a **Success!** message with their account number and order summary.



- 12** If your customer's enrollment requires additional steps to be completed, they will receive an **Action Required** screen. Your customer will be instructed to check their email inbox for next steps to resolve any holds.



- 13** If enrollment was successful or once any holds are resolved, your customer will receive a **Welcome!** email, confirming their start date and plan details.



## ✓ Congrats!

Your customer has officially enrolled in Stream's energy service. Encourage your customer to create their My Stream Account online and download the My Stream Connect App to manage their account at the tap of a button. We can't wait to power your customer's lifestyle.