APX MarketSuite® Demand Response System Training For SCE Programs
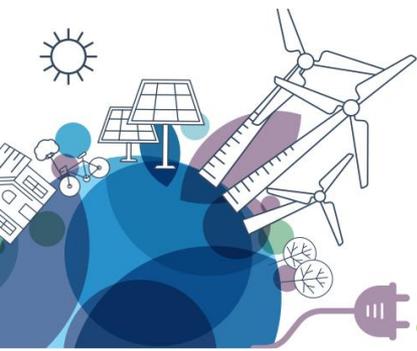
APX DR Program Contacts

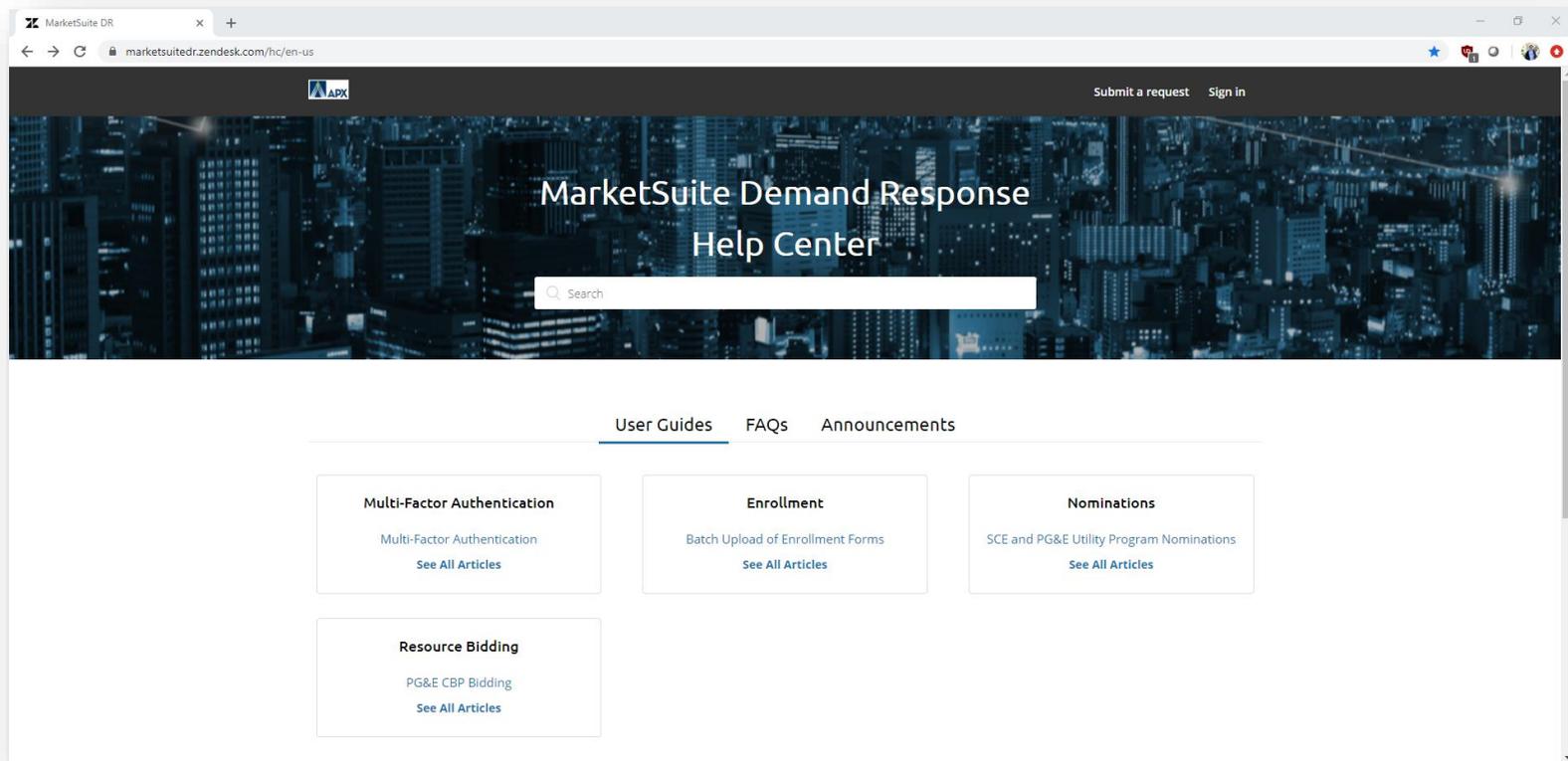| Name	Role	Phone Number	Email Address
Midson Hay	APX Account Manager	408-597-4308	mhay@apx.com, DR@apx.com
Nino Mijares	APX Account Manager	408-517-2129, Option 2	nmijares@apx.com, DR@apx.com
Carl Schlemmer	APX Program Manager	408-517-2134	cschlemmer@apx.com, DR@apx.com

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System Information

- Supported Browsers: Chrome, IE11, Edge, Firefox
  - Unsupported Browsers: IE10 and below, Safari

- Notification Information:
  - From address changes. "@apx.com" will remain the same.
    - e.g., helpdesk@apx.com <23947514_1517278394@apx.com>
  - Email server that should be whitelisted:
    - notify.apx.com
    - notify.mir3.com
    - notify2.mir3.com
    - notify20.mir3.com
    - notify200.mir3.com
  - Phone number/Caller ID: 888-896-8640
  - SMS Short Code: 24639

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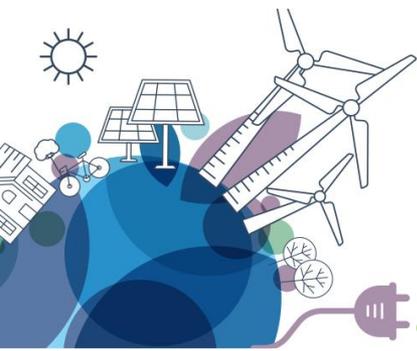
MarketSuite DR Help Center

User guides to using MarketSuite DR System

https://marketsuitedr.zendesk.com/hc/en-us

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DR Systems URL

- APX DR URL - https://marketsuitedr.apx.com
  - Supported browsers are Google Chrome, Microsoft Edge, and Internet Explorer (IE11+)

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DR Systems – Aggregator Functionality

- Self-Registration
- Manage Notification Contacts
- Submit Online Enrollments
- Manage Monthly Nominations
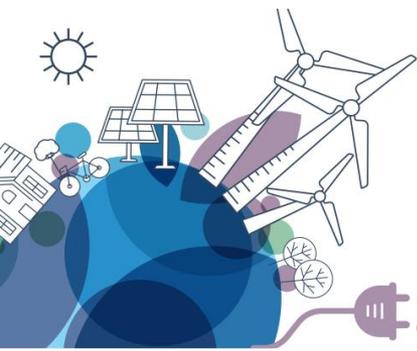- Submit Bids
- View and Download Program Reports

APX MARKETSUITE™   Applications   Administration   Support

Demand Response   Home | Enrollment | Notification Contacts | Nomination | Reports

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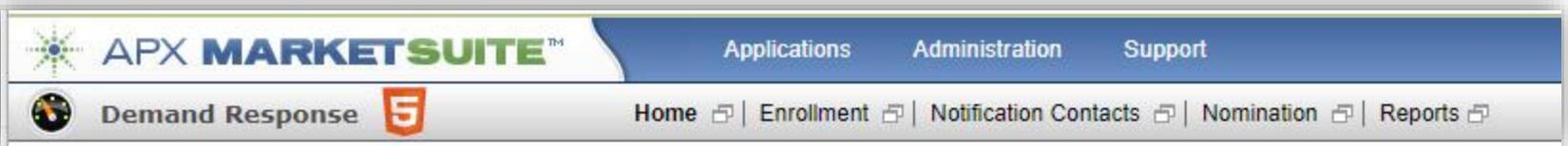
DR Systems Registration

- Self-Registration
    1. Go to https://marketsuitedr.apx.com
    2. Click "Self-Register"
    3. Fill out the registration form
    4. Click "Create User"
    5. When you receive a confirmation email, click the link in the email to confirm the registration and for an APX account manager to review
    6. After your account has been reviewed an account activation email will be sent to the user when activated.

    *Users can be provided with read-only rights. E.g. viewing enrollments

    **Aggregators should let APX know when personnel leave so their username can be deactivated.

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APX MarketSuite DR Home Page

- Home Page/Landing Page

- View Participant Curtailment Statuses and Program Curtailment Statuses for the current and next day

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Managing Notification Contacts

- In the Selection Criteria in the Contacts drop-down contains all active Notification Contacts and allows the user to Add New Contact

- At least one method of contact must be entered and at least one program must be selected. E.g. E-mail, Text Msg Number, or Phone number must be entered

- Clicking the "Test" button sends a test message to all the communication methods of contact listed for the contact

SCE SLAPs

- **Sub-Load Aggregation Points**
  - SLAP_SCEC
  - SLAP_SCEN
  - SLAP_SCEW
  - SLAP_SCHD
  - SLAP_SCLD
  - SLAP_SCNW

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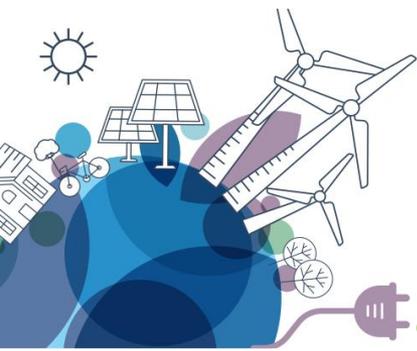
Enrollments

- Enrollment Form (Add and Remove) creation, submission and review process integrated into APX DR System

Add/Remove Form	→	Customer Signature	→	Add Form Review/Approval	→	Service Account Approval

Add/Remove Form
- Aggregator creates new record in DR System
- Provides customer and aggregator contact information
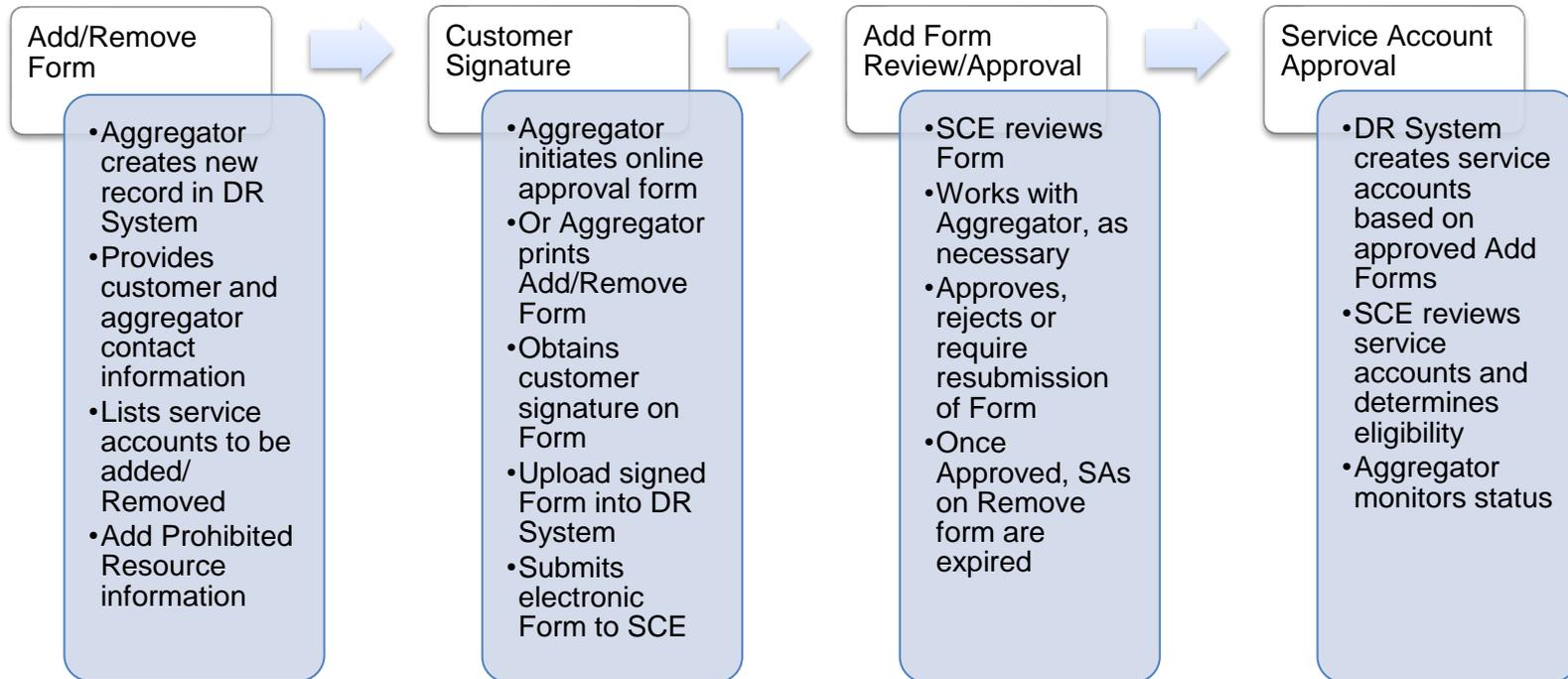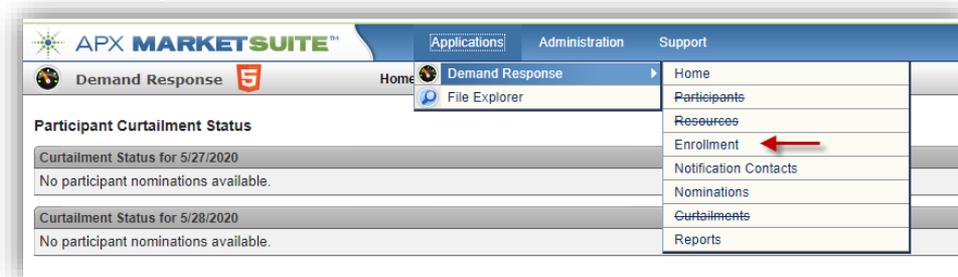- Lists service accounts to be added/ Removed
- Add Prohibited Resource information

Customer Signature
- Aggregator initiates online approval form
- Or Aggregator prints Add/Remove Form
- Obtains customer signature on Form
- Upload signed Form into DR System
- Submits electronic Form to SCE

Add Form Review/Approval
- SCE reviews Form
- Works with Aggregator, as necessary
- Approves, rejects or require resubmission of Form
- Once Approved, SAs on Remove form are expired

Service Account Approval
- DR System creates service accounts based on approved Add Forms
- SCE reviews service accounts and determines eligibility
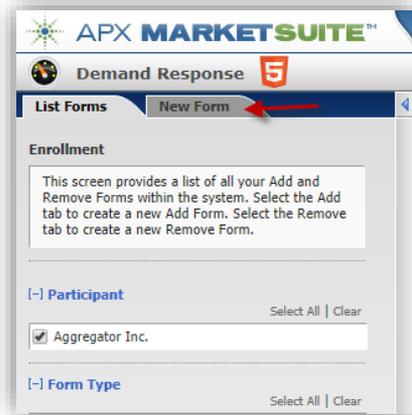- Aggregator monitors status

POWERED BY APX

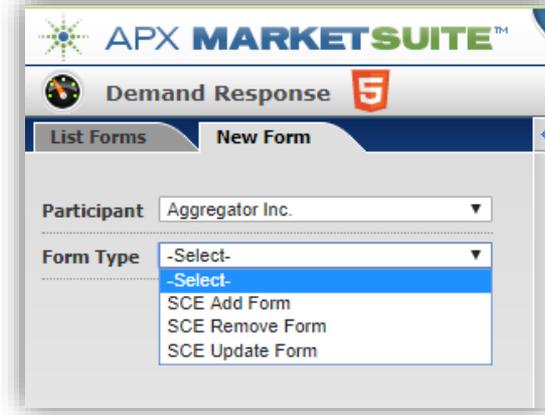# Creating a New Add/Update/Delete Form

Step 1: Go to Applications > Demand Response > Enrollment

Step 2: Click on the "New Forms" tab on the left pane

Step 3: Select the form type applicable to you

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Form Details

- Link to print form with completed data
- Alias assigned by Aggregator to organize Forms
- " * " indicates fields required for submission
- Link to upload data via csv (no headers)
- " * " indicates required fields for each Service Account. Note: Service Agreement number
- Links used to Add, Remove, or Delete service accounts from the form
- Click Choose File to select signed Form file to upload. Once selected, Click Save or Submit to attach the file. Note: Once the form is submitted it is no longer editable.
- Aggregator Comments captures comments to be shared with SCE. Reviewer Comments captures SCE comments or instructions for the aggregator if Form has been returned to aggregator for editing and resubmission
- The Buttons listed on the bottom of the Add Form indicate available actions and next steps. The buttons only become enabled when all required data have been entered
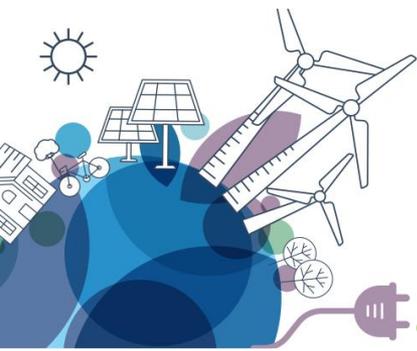
Online Customer Approval

- Online approval module that facilitates end-use customers' review and approval of SCE enrollment forms (i.e., Add, Delete, and Update forms) submitted by Aggregators.

  - Email notifications sent to end-use customers providing instructions for accessing, reviewing and approving enrollment forms. The link will expire after 3 days and can be re-sent by the aggregator.
  - Customer submits approval or rejection of the enrollment form via the online portal.
  - Email notifications sent to the end-use customers providing confirmation of their approval or rejection.
  - "Aggregator Enrollment Forms" report available to the Aggregators to review the status of the customer online approvals.

Online Customer Approval (continued)

- When the customer opens the link it will open the enrollment form and they will be able approve or reject the form. Once an action is taken, they will receive confirmation.

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Online Customer Approval (continued)

- When initiating an online approval you will be prompted to confirm this action
- If the link expires the link can be re-sent.
- When the customer approves the form, the signed form will show on the approved enrollment. *

*An approved enrollment does not mean the SA's are eligible.

Managing Forms

Managing Forms (continued)

Form Statuses

- **Draft** – Aggregator must complete and submit to SCE for approval. (Editable)

- **Pending Review** – SCE to review submitted form. (Cannot Edit)

- **Resubmission Required** – Indicates SCE found an issue with the form that requires the aggregator to update the form and resubmit. (Editable)

- **Rejected** – Indicates the form has been rejected and will not be review any further. (Cannot Edit)

- **Cancelled** – Indicates the form submission was cancelled by the aggregator. (Cannot Edit)

- **Approved*** - Indicates the form has been approved. (Cannot Edit)

  - Approval of an Add Form does not indicate SA eligibility. The next step is an eligibility review of each SA.

  - When an Add approved, SAs will appear in the **Service Account Status** report.

  - When a Delete form is approved, all SAs on the form will be marked for expiration with the later of today's date or the last day for which the SAs were nominated.

Monitoring Service Account Registration

- Monitoring Service Account Approval

  1. Once the Add Form has been approved, the service account records are created and displayed within 24 hours

  2. New Service Account Status Report can be used to track service account registration status, displaying data such as eligibility status and days in status

  3. Once marked Eligible by SCE, a service account can be nominated

Click on column headers to sort

Export to Excel for additional data manipulation

Filter list of service accounts by Eligibility Status

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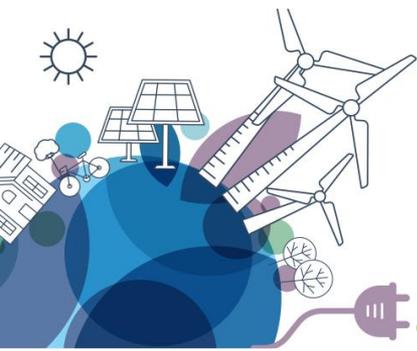
DR Batch Nomination

Nomination Verification Report

This report service two purposes: (1) verifying the current month's nominations and (2) serving as a template for the batch upload process. To download the report:

1. Go to Reports and select **Nomination Verification**

2. Once the selection criteria fields are selected, click the Run Report Button to populate the data pane

3. Download the Nomination Verification Report in **CSV (comma delimited)** format.

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DR Batch Nomination (continued)

Batch Nomination Upload

1. Service account data are pre-populated and do not need to be updated

2. Users must fill out the last 5 columns of the report: **Product, Baseline Option, Nominate, Monthly Portfolio Nomination MW, Tech Potential kW (Tracks expected reductions by SA)**

   ➢ Baseline Options: "10/10 Baseline: No Adjustment", "10/10 Baseline: Day Of Adjustment (40% Cap)"

   ➢ Columns are pre-populated if service account was nominated in the previous month

   ➢ Must enter "Yes" for Nominate column

   ➢ <u>Monthly Portfolio Nomination must be the same for all portfolios, SUM of the portfolio.</u>

3. Save the file as type CSV (comma delimited)

	S	T	U	V	W	X	Y
:i	product	baseline_option	nominate	monthly_portfolio_nomination_mw	tech_potential_kw	Firm_Serv	external_id
4	DO 1-6 Hour	10/10 Baseline: Day Of Adjustment (40% Cap)	Yes	0.404	19.591		
4	DO 1-6 Hour	10/10 Baseline: Day Of Adjustment (40% Cap)	Yes	0.404	15.392		
3	DO 1-6 Hour	10/10 Baseline: Day Of Adjustment (40% Cap)	Yes	0.404	12.948		
1	DO 1-6 Hour	10/10 Baseline: Day Of Adjustment (40% Cap)	Yes	0.404	16.042		
7	DO 1-6 Hour	10/10 Baseline: Day Of Adjustment (40% Cap)	Yes	0.404	18.382		
0	DO 1-6 Hour	10/10 Baseline: Day Of Adjustment (40% Cap)	Yes	0.404	17.628		

https://marketsuitedr.zendesk.com/hc/en-us/articles/360044249153-SCE-and-PG-E-Utility-Program-Nominations

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DR Batch Nomination (continued)

Portfolio Nominations by Product and Location

Program	Location	Product	Load Type	LSE	SA ID	Nominated MW	Tech Potential kW	max_events_ per_ month	max_event_hours per_ month	max_event_day s_in_sequence	External_ id
CBP-SCE	SLAP_SCHD	DA 1-6 Hour	Direct Access Load	Company A	123	0.5	400				
CBP-SCE	SLAP_SCHD	DA 1-6 Hour	Bundled	Company C	XYZ	0.5	150				
CBP-SCE	SLAP_SCHD	DO 1-6 Hour	Direct Access Load	Company A	789	1	120				
CBP-SCE	SLAP_SCHD	DO 1-6 Hour	Direct Access Load	Company B	EFG	1	800				
CBP-SCE	SLAP_SCEW	DA 1-6 Hour	Bundled	Company C	MNO	2.9	2800				
CBP-SCE	SLAP_SCEW	DA 1-6 Hour	Bundled	Company C	456	2.9	250				

*Three new columns to allow aggregators to set the maximum events and hours per month and maximum consecutive events at a resource/nomination level (not less than program defaults).

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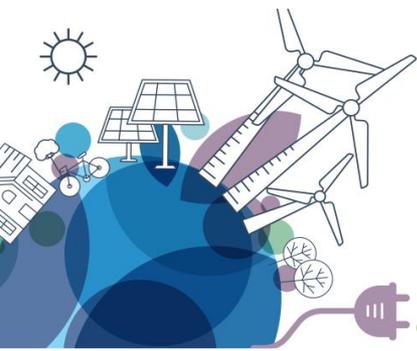
DR Batch Nomination Upload

1. Review the Nomination Verification report

2. Identify service agreements to nominate to specific products

3. Identify nominated MW value for each portfolio

4. Upload the report to the Import tab on the Nominations Application

Once the required fields are entered in the spreadsheet exported from the **Nomination Verification Report** and is saved to a location on your computer, go to the **Nomination** application, click the **Import** to upload nominations.

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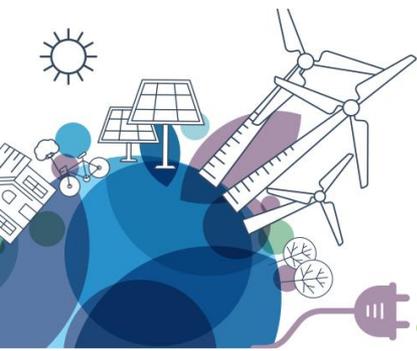
Batch Nomination Upload (continued)

After nominations are uploaded successfully, the **Nomination Import Summary** summarizes results of the upload. If there are issues with the upload, an error message is displayed and user is required to update the file and re-upload.

Program:	Participant:		Trade Month:	File:
CBP-SCE			**Jun, 2020**	**C:\fakepath\Preprod Test Nomination Verification.csv**

Import Summary

Product	Meters	MW
DO 1-6 Hour -N/A -No MPP	32	0.10000000
DO 1-6 Hour -N/A -No MPP	7	0.10000000
DA 1-6 Hour -N/A -No MPP	30	0.10000000
DA 1-6 Hour -N/A -No MPP	3	0.10000000
DA 1-6 Hour -N/A -No MPP	4	0.10000000

Note: Batch Nomination upload overwrites all previous nominations entered in for that nomination month

APX DR System - MarketSuite

- Reports

POWERED BY APX

APX DR System - MarketSuite

- Reports

  Portfolio Nomination
  - Verify nominations are correct

  Meter Nomination

  Meter Readings
  - Can elect to see data for all SAs or just nominated SAs

  Participant Curtailment History

  Program Curtailment History
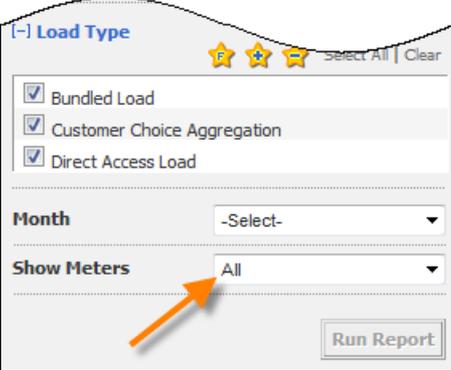
  Notification Contacts

  Nomination Verification
  - Used as the template for batch uploading nominations

  Service Account Status
  - Used to track status of SAs added via Add form

  Settlement Statement Summary

  Settlement Statement Detail
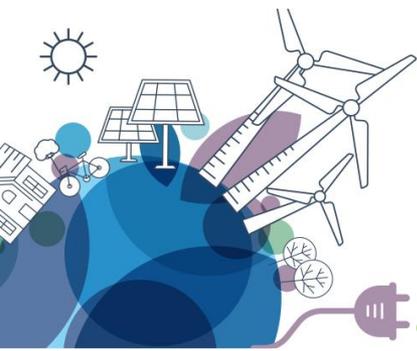
Event Dispatch

- Dispatch and Notifcaitions
  - Dispatch may be system wide or at the local level
  - Initially notifications may be for each program-location combination
  - Will be implementing an enhancement to combine notifications for program-locations combinations

From: helpdesk@apx.com <helpdesk@apx.com>
Sent: Wednesday, May 27, 2020 10:44 AM
To: Midson Hay <mhay@apx.com>
Subject: (Sent From Test Environment - No Action Required) TEST: Southern California Edison CBP Event Called for 06/01/2020
Importance: High

TEST Instruction: Southern California Edison CBP Day Ahead Load Reduction event for 06/01/2020 has been initiated.

Program	Participant	Curtailment Type	Location	Product	Load Type	MPP	MW	Curtailed Hrs.	Total Hrs.
Southern California Edison CBP	Aggregator Inc.	Test – SCE	SLAP_SCEW	CBP 1-6 DA	Not Applicable	No Multiple Program Participation	0.1000	From 1500-1600	1
Southern California Edison CBP	Aggregator Inc.	Test – SCE	SLAP_SCHD	CBP 1-6 DA	Not Applicable	No Multiple Program Participation	0.1000	From 1500-1600	1
Southern California Edison CBP	Aggregator Inc.	Test – SCE	SLAP_SCNW	CBP 1-6 DA	Not Applicable	No Multiple Program Participation	0.1000	From 1500-1600	1

For additional dispatch information please contact APX at 408-517-2135 or visit https://marketsuitedr.apx.com/ or contact Southern California Edison at 866-334-7827 or visit www.sce.com/drp/events if you have any questions.
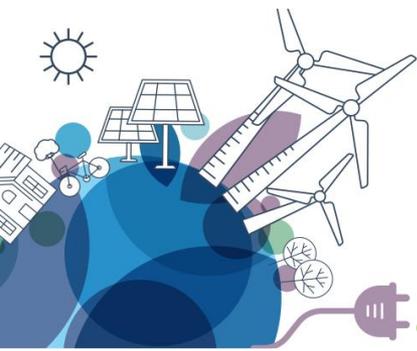
Next Steps

1. Have New Users Self-Register in APX Demand Response System

2. Review and update notification contacts

3. Run notification tests

4. Enroll resources in programs

5. Make Monthly Nominations

    *   Nomination window opens for the first 5 Business days of the month.

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Questions?

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