

# Third-Party Integration

## NorthStar Integration

### NorthStar Integration Overview

MyAccount integrates with NorthStar at three points.

- 1) Customer Data File – WPPI sends a customer data to MyAccount each night to synchronize the NorthStar customer records with MyAccount. This file includes the customer number, account number, meter number, name, billing and service address, phone, start date, meter install/remove dates, acct end date, service type, balance due, past balance due, and E-bill preference
- 2) Billing Data File – WPPI sends a billing data file to MyAccount each night to synchronize the billing history. The billing data file includes Account number, Meter number, and Customer number. It also includes the most recent: meter reads, billed usage, bill date, billing period, bill amount due, bill due date, current charges, bill code).
- 3) NorthStar Business Layer API (NSBL) – This is the real-time interface between NorthStar and MyAccount. Real-time interactions between the two systems include:
  - a) Query for account balance on logon.
  - b) Query for posted payments and transactions as well as remove pending status for payments in MyAccount on logon.
  - c) Retrieve all account transactions for the billing history page. Journal types of “BJ” are excluded on the billing history page; billing journal information is sent to MyAccount via the daily Billing Data File.
  - d) Reconcile pending transactions through a daily process that queries NorthStar for each pending payment in MyAccount, marking completed payments as posted in MyAccount, and deleting MyAccount pending payments older than one day.
  - e) Update customer mailing address when a customer updates from MyAccount

The screenshot shows a web browser window with the title "Account Management View (BROWSE) ACTIVE". The browser address bar shows "9 of 6718". The page content is organized into a grid of form fields. The "Mailing Information" section contains fields for "Address 1", "Address 2" (101 EAST GRAND AVE SUITE 11), "City" (PORT WASHINGTON), "State" (WI), "Zip" (53074-2241), "Mode" (C001), "Home phone", "Business phone", "Cell phone", and "Email". The "Other" section contains fields for "Alpha code", "SSN", "Driver's license", "Cyc / Rte / Walk" (1, 1, 45), "Language" (ENGLISH), "Class" (Gen Service), and "Bill copies" (1) with a checked "Receive Printed Bills" checkbox. The "Current Service Address" section contains fields for "City" (CEDARBURG), "State" (WI), "Zip" (53012), "Lot" (11), and "Plan". The "Previous Service Address" section contains fields for "Address 1", "Address 2", "City", "State", and "Zip".

- f) Update customer e-billing settings. The MyAccount e-bill flag connects to the NorthStar “Receive Printed Bills” checkbox. This checkbox can be seen in the NorthStar Account Gateway, in the Other box of Account Details. Changes in MyAccount update NorthStar immediately using the NSBL. Changes in NorthStar to “Receive Printed Bills” update MyAccount after the nightly customer data file upload.
- g) Insert a payment into the NorthStar web payments table. Payments show on the Utility Web Payments Transfer Screen. From this screen transfer payments to a batch for posting.
  - i) Payments are inserted in real time
  - ii) If payment insertion fails upon the initial attempt due to high traffic on the NSBL web service, four additional attempts will be made: after 3, 30, 150 and 360 minutes.

## NorthStar Payment Processing

**Best practice:** reconcile web payments to those shown on the payment processor’s dashboard screen each day.

**Payments in the NorthStar Web Payments screen and the payment processor dashboard that are not in the NorthStar web payments table must be manually inserted and posted.** If it is necessary to manually enter a payment in cashiering, you must enter the processor’s transaction ID (authorization code) into the Reference Number box in order to clear the pending payment in MyAccount (see below)

The screenshot shows the 'Cash Processing (BROWSE)' window. The 'Receipt (BROWSE)' section is active, displaying fields for Date (2018-08-10), Batch Name (blips1), Agency # (0), Station (slave), Receipt # (1821700), and Name on Receipt (WILLIAM M BAUDHUN). The 'Method of Payment (ADD)' section is also visible, with a 'Payment Code' of 500 (CREDIT CARD PAYMENT) and an 'Amount Tendered' of 500.00. The 'Reference' field is highlighted in yellow, and a red arrow points to it. A tooltip for the Reference field is displayed, indicating 'Field name: drawn\_by', 'Columns: 30', and 'Maximum Characters: -1'. The 'Receipt Totals' section shows 'Amount Owing: 500.00', 'Amount Tendered: 0.00', and 'Change: -500.00'.

After posting the payment in NorthStar, the next time a user logs into MyAccount, the user will not see the pending transaction, and it will show complete along with the account balance reflecting the complete payment.

If you do not have the authorization number, it available on the billing history screen in MyAccount. The pending payment line will include the authorization number.

Date	Description	Usage	Period Ending	Due Date	Amount	Balance	Bill #	View
4/16/2019	Pending Payment - Authorization Number: <a href="#">1620190434947921048</a>				(\$89.94)			

Admin users can delete pending payments by clicking the red “X” in front of the pending payment line item in a customer’s billing history table.

## NorthStar – Removing a customer from eBilling

Customers can be removed from eBilling by placing a check box in the Receive Printed Bills field in Account Gateway – Account Details. Customers SHOULD NOT BE enrolled in eBilling by removing the check box. Enrollment must be through the MyAccount website. Customers that don't have a MyAccount login and are enrolled in eBilling will not receive a printed bill AND will not receive an email notification.

Account Management View (BROWSE) ACTIVE

9 of 6748

Quick Info | Account Details | Occupant Info | Additional Information | Screen Audit

**Mailing Information**

Address 1: [ ]  
Address 2: 101 EAST GRAND AVE SUITE 11  
City: PORT WASHINGTON  
State: WI  
Zip: 53074-2241 Mode: C001  
Home phone: [ ]  
Business phone: [ ]  
Cell phone: [ ]  
Email: [ ]

**Other**

Alpha code: [ ]  
SSN: [ ]  
Driver's license: [ ]  
Cyc / Rte / Walk: 1 1 45  
Language: E ENGLISH  
Class: G Gen Service  
Bill copies: 1 Receive Printed Bills:

**Current Service Address**

City: CEDARBURG  
State: WI  
Zip: 53012  
Lot: 11  
Plan: [ ]

**Previous Service Address**

Address 1: [ ]  
Address 2: [ ]  
City: [ ]  
State: [ ]  
Zip: [ ]

## EnergyIP MDM Integration

As meter data is processed by energyIP it is sent to MyAccount using the data transfer service feature in near real-time. Once at the MyAccount site, their data loader imports the reads into the MyAccount database. An aggregation process then rolls the 15 or 60-minute reads into hourly, daily, weekly and monthly totals for display purposes.

Utility staff can manually resend and load data to MyAccount from energyIP using the data transfer service screen shown below. Use the action menu to select the dates to transfer and create the request. Once a request completes and the file is sent to the MyAccount server, the data must be loaded manually in the MyAccount Data Load screen found under the Admin menu. Find the process "All Standard Interval with mapping" and click on the settings wheel to the right. Select Run Now to load the new meter data.

Search | Information | Device Events | Meter Data

Last login: 03/29/2019 16:42:12  
Time Zone: America/Chicago

Service Point Summary  
Billing Requests  
Service Requests  
DTS Requests  
Customer  
Accounts  
Consumers  
Assets and Services  
Service Point  
Channels  
Devices  
Data Services  
Service Agreements

**DTS Request** Action

Ref: [ ] Export Start Time: [ ] Export End Time: [ ] DTS Group: [ ] Export Identification Tag: [ ] Export Status: [ ]  
DTS Class Name: [ ]

Search Reset

Request Id	DTS Version Id	Export Start Time	Export End Time	Export Id Tag	DTS Name	DTS Class Id
No Records						

## InfoSend Integration

- 1) MyAccount links to the InfoSend PDF archive to retrieve bills based on the bill date as sent in the NorthStar billing data file.
- 2) InfoSend bills are available for viewing in MyAccount after receiving the confirmation email from InfoSend. If the billing journal is posted to NorthStar prior to confirmation from InfoSend, bills may not finished processing to the PIA and may not be available for customers to view. In that case, an error message will display when trying to view the bill in MyAccount.
- 3) After posting the bills in NorthStar, customers will see the bill in MyAccount the next day, and the view bill link for the new bill will be available.
- 4) Up to twelve months of historical bills are available for viewing in MyAccount if they are available in the InfoSend PIA.

## Payment Processor Integration

- 1) Paymentus and PSN are supported payment processors
- 2) Integration is between MyAccount and processor only
- 3) When a customer submits a payment, information in the form of a secure token is passed from MyAccount to the processor; no financial information is stored in MyAccount
- 4) When a payment successfully processes, another secure token is passed from the processor through MyAccount to NorthStar.
- 5) If a one-time payment is rejected at the time of submission, the user will get an error message on-screen in real time
- 6) If a scheduled payment (scheduled one-time or recurring auto pay payment) fails, error information is recorded and retrievable in the Payment Error Integration Report.
- 7) If a successful payment fails to properly insert into the NorthStar web payments table, MyAccount will retry the payment up to four additional times until successful. Retry times are set at 3, 30, 180 and 360 minutes after the first submission time.
- 8) Utility continues to use their payment processor's back end portal to view payments and interact with processor. For Paymentus, this is the Agent Dashboard.