Enerline Balancing Transactions

View (recent and historical), request and accept balancing transactions
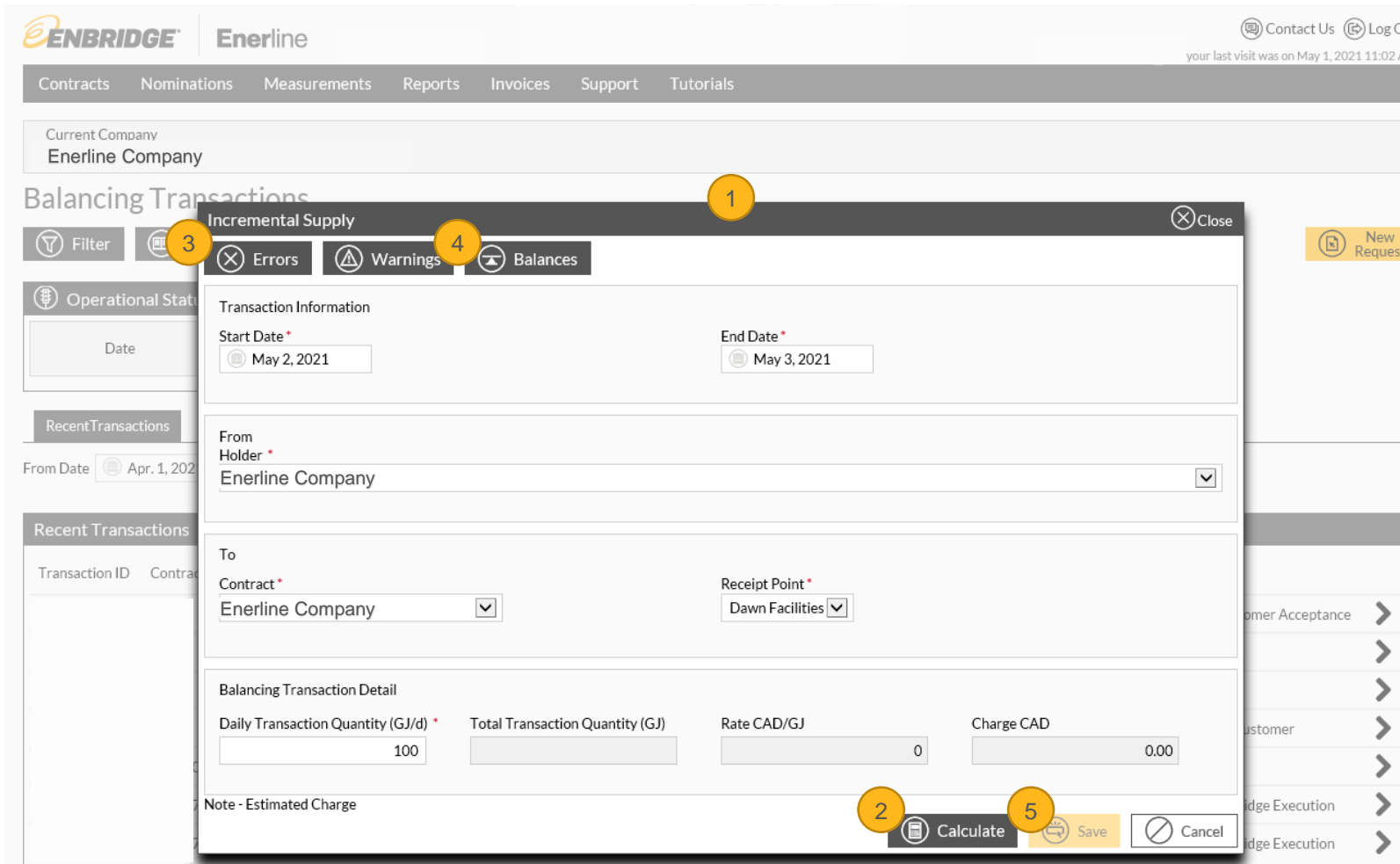

1. **Filter Button** allows you to customize the list of Balancing Transactions displayed on the Invoices screen. The number in the green indicator on the top right side of the button indicates how many Balancing Transactions have been filtered out.

2. **Accept Transaction Button** displays a window with all the Balancing Transactions available to accept (subscriber must have the Balancing Transaction Approval Access Right). The number in the yellow indicator on the top right side of the button indicates the number of transactions currently available for acceptance.

3. **New Request Button** allows you to request a new Balancing Transaction (if you have the Balancing Transaction Request Access Right).

4. **Operation Status** shows 3 days of operational status. Find more details by clicking the ⑦ Button to open the Operational Status page.

5. **Recent Transaction Tab** allows you to view the recent Balancing Transactions based on the date range you select.

Enerline > Contracts > Balancing Transactions

Enerline Balancing Transactions – New Request

1. **New Request Popup** allows you to enter all the data for the Balancing Transaction.

2. **Calculate Button** allows you to calculate the Total Transaction Quantity and Charge once all the mandatory fields are populated in the screen. This button will not become active until all the mandatory fields are populated.

3. **Errors and Warnings Buttons** each display a window with a details reason for the error or waring. Errors will have a red indicator on the top right corner of the button identifying the number of errors. You cannot save a Balancing Transaction if there are Errors present. Warnings will have a yellow indicator on the top right corner identifying the number of warnings. Balancing Transactions with Warnings can be saved and will require a manual review once submitted.

4. **Balances Button** provides you with an overview showing your Balancing Parameters, BGA variance based on any balancing executed since the last billing and the projected variance based on this new request.

5. **Save Button** allows you to save the Balancing Transaction. You will be directed to the New Request tab on the Balancing Transactions screen where you will be able to submit the request.

Enerline > Contracts > Balancing Transactions

Enerline Balancing Transactions – New Requests

1. **New Request Tab** allows you to view, edit and/or submit your saved transactions.

2. **Delete Button** allows you to delete the transaction.

3. ❯ allows you to view or edit the details of the Balancing Transaction before submitting.

4. **Submit All Button** allows you to submit the list of new Balancing Transactions.

Enerline > Contracts > Balancing Transactions

Enerline Balancing Transactions – Accept Transaction

1. **Transaction List** allows you to select the Balancing Transaction you would like to accept or reject.

2. **Reason Text Box** allows you to include a reason for accepting or rejecting a Balancing Transaction. A reason is mandatory when rejecting a transaction.

3. **View Authorize Notice Button** allows you to view the Authorization Notice for the selected Balancing Transaction.

4. **Reject Button** allows you to reject the selected Balancing Transaction.

5. **Accept Button** allows you to accept the selected Balancing Transaction.

Enerline > Contracts > Balancing Transactions