Accessing the Agency Pledge Portal

Navigate to swgas.com. From the home page, select the Community menu, and then select “Charitable Giving.”

Scroll down to the Agency Pledge Portal section and select “AGENCY PLEDGE PORTAL LOG IN.”

Log In Screen

To log into the Portal, enter your email address and password, and select the “LOGIN” button.

Access the FAQs for additional documentation and information to guide you through the Portal.
Once logged into the Portal, the Home Screen displays.

Access to functionality is based on user type. Users designated as **Administrators** have full Portal access.

**General users** have access to search Southwest Gas customer accounts, make pledges, perform address verification, and request a quote letter.

**Inquiry Only users** have access to search Southwest Gas customer accounts, perform address verification, and request a quote letter.

These tabs allow for quick access to commonly used Portal features.

To search for customer information, follow these steps:
- Select “Customer Search” from the Home screen
- Verify a written and signed authorization form from the customer is on file with agency
- Check the customer authorization checkbox
- Enter the customer’s account number and last four digits of customer’s ID provided to Southwest Gas, OR the customer’s last name.
- Select “SEARCH”

For additional information regarding authorization forms, visit the FAQs page.
After successfully performing a search, the Account Summary appears. This screen provides an overview of the customer's account and allows users to make a pledge.

### Account Summary

- **Make a pledge.** This button is not available to Inquiry Only users.
- **Review account details**
- **Date for disconnect or link to current bill**

### Usage Within the Last 12 Months

- Total Therm: 434
- Total Dollars: $397.96

### Assistance Programs

- Special programs exist for those who qualify for reduced utility rates. Find out if the customer is eligible to receive assistance.

### Hints and Tips

- To search using the Last 4 digits of ID, it must match ID shown on Southwest Gas account.
- To search using Last Name, it must be an exact match to name on Southwest Gas account.
- Verify customer name and address under the Account Information section, Primary / Secondary.
- If the Amount Due includes arrears, the past due amount owed will display next to the total.
- Usage is based on the service address and may contain less than 12 months.
- Active accounts subject to disconnect for non-pay will display the disconnect date in **orange**.
- Inactive accounts will display the inactive status reason.
- The Account Status affects the Usage, Billing, and Payment histories.
- In Payment History, the source of the payment will display as “Regular” or “Agency”.
- In Pledge History, pledges made by another agency will display as “Other”.

If a search does not yield expected results, refer to the Support section of this guide.
From the Account Summary screen, select the “MAKE A PLEDGE” button to open the pledge window.

To enter your pledge, follow these steps:

- Select the Funding Source
- Select Apply Towards to choose a charge type to apply funds
- Enter dollar amount in Pledge Amount box (Ex: 35 = $35.00; 3550 = $3,550.00; 35.50 = $35.50)
- Select “CONTINUE” to review pledge and make changes as needed

Note: A separate pledge is required for each funding source and / or charge type combination. Refer to the section on “Making Multiple Pledges on a Customer Account” below.

- Confirm pledge details. If a change is required, select “MAKE CHANGES” to edit.
- When pledge details are correct, select “SUBMIT PLEDGE” to submit.
• The “Pledge Completed Successfully” screen displays

![Pledge Completed Successfully](image)

- Click the “PRINT” button to print pledge details.
- Click “ADD ANOTHER PLEDGE” button to make another pledge on the same account.
  - This would be done if the monies need to be divided between two different funding sources or applied to different charges.
  - Example of first pledge:
    - **Funding Source**: LIHEAP (EAP) - Enr
    - **Apply Towards**: UTILITY BILL
    - **Pledge Amount**: 75.00
  - Example of second pledge:
    - **Funding Source**: ACAA - Arizona Cc
    - **Apply Towards**: DEPOSIT
    - **Pledge Amount**: 100.00
- Total amount of pledge made on the customer’s account is $175.00
- Click “X” or the “CLOSE” button to close screen and return to Account Summary page
- Select “Pledge History” to review the pledge
Address Verification

The Address Verification functionality allows users to look up an address to see if Southwest Gas service is available. To verify, enter an address in the Address field.

When an address is entered, results begin to appear that match addresses serviced by Southwest Gas.

<table>
<thead>
<tr>
<th>Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>5788 N LAKE, CARNEILIAN BAY, CA 90140</td>
</tr>
<tr>
<td>5769 DEEP SEA CT, LAS VEGAS, NV 89110</td>
</tr>
<tr>
<td>5768 BLUE SEA ST, LAS VEGAS, NV 89110</td>
</tr>
<tr>
<td>5768 JUDSON AVE, LAS VEGAS, NV 89156</td>
</tr>
<tr>
<td>5768 E CAREY AVE, LAS VEGAS, NV 89156</td>
</tr>
</tbody>
</table>

When a search is successful, a successful message appears below the Address field. If not, no message is displayed.

This address is serviced by Southwest Gas

If no address is found, a “No Address Found” message is displayed.

<table>
<thead>
<tr>
<th>Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>88888</td>
</tr>
</tbody>
</table>

| No Address Found                             |

Note: This search function will identify partial matches. If the correct address has been entered, but is not listed in the results, the address is not serviced by Southwest Gas.
Request a Quote Letter

To request a quote letter, enter the customer information in the form and submit. Your request will be completed within three (3) business days.

![Request a Service Establishment Quote Letter](image)

Change Password

To change your Portal password, follow these steps:

- Select “Change Password” from the Home screen or the Settings menu tab
- Enter required information

![Change Password Form](image)
Logout

To logout, select the Logout link.

Set Up a New User – Administrator Use Only

The Primary and Secondary contacts designated for an agency are granted administrative rights and can grant General and Inquiry user access to the Agency Pledge Portal to other users within their own agency.

- Select “Set Up New Users” from the Home Page or the Settings menu tab
- Complete all required fields and select “CREATE NEW USER”
- The new user will receive an email with login instructions
Manage Users – Administrator Use Only

The Primary and Secondary contacts designated for an agency are granted administrative rights to manage all Agency Pledge Portal users for their own agency.

- Select “Manage Users” from the Home page or the Settings menu tab
- Under Options, select the Update button to edit a user’s information
- Under Options, select the Deactivate button and follow prompts to disable a user’s access

<table>
<thead>
<tr>
<th>Name</th>
<th>Title</th>
<th>Last Updated</th>
<th>Last Logged In</th>
<th>Status</th>
<th>User Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>JOHN DOE</td>
<td>Programmer</td>
<td>01/26/2017</td>
<td>12/12/17 08:40 PM</td>
<td>ACTIVE</td>
<td>INQUIRY</td>
</tr>
<tr>
<td>JANE DOE</td>
<td>Person Of Interest</td>
<td>01/26/2017</td>
<td>12/12/17 08:42 PM</td>
<td>ACTIVE</td>
<td>ADMIN</td>
</tr>
<tr>
<td>STEVE SMITH</td>
<td>Person Of Interest</td>
<td>01/17/2017</td>
<td>12/12/17 08:40 PM</td>
<td>ACTIVE</td>
<td>GENERAL</td>
</tr>
</tbody>
</table>

Reports – Administrator Use Only

Reports are available to Administrator users only and may be accessed from the Reports submenu. Users may choose a custom date range, or choose preset 30-60-90-day buttons to view data. Reports may be exported to a .csv file as well.

The following reports are available:

Pledge History Report

The Pledge History Report shows the history of pledges made by the user’s agency. Pledges are sorted by the order they are received, from newest to oldest.
User Activity Report

The User Activity Report shows the history of pledges made by agency user. Pledges are sorted by who the pledge was made by in alphabetical order (first name), and then the order they are received, from newest to oldest.

Pledge Funding Source Report

The Pledges by Funding Source Report shows the history of pledges made by an agency. Pledges are sorted alphabetically by Funding Source, and then alphabetically by pledge status.

Support

For questions, contact Southwest Gas Agency Assistance at sca-swgagencies@swgas.com, or 877-967-9427.