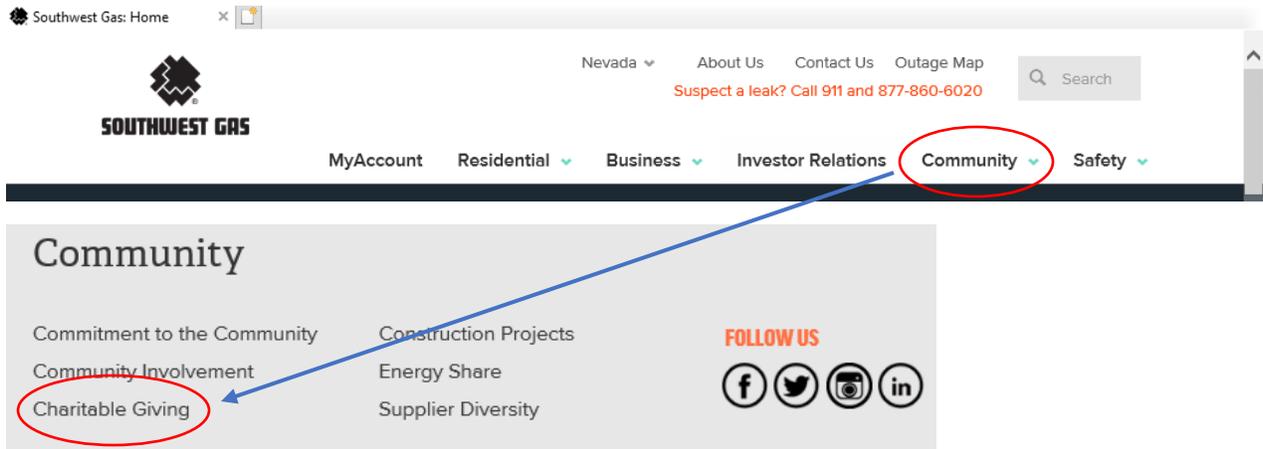


## Southwest Gas Agency Pledge Portal User Guide

### 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”

#### ENERGY SHARE



Energy Share is an emergency fund that provides direct utility assistance to qualified customers with unexpected financial difficulties.

[LEARN MORE ABOUT ENERGY SHARE](#)

#### SUPPLIER DIVERSITY



We welcome the opportunity to build strong business relationships with a variety of suppliers in our service territories and across the nation.

[LEARN MORE ABOUT SUPPLIER DIVERSITY](#)

#### AGENCY PLEDGE PORTAL



The Agency Pledge Portal allows charitable agencies the opportunity to pledge to pay Southwest Gas customer's utility bills.

[AGENCY PLEDGE PORTAL LOG IN](#)

## Log In Screen

To log into the Portal, enter your log in and password, and click the Log In box



Suspect a leak? Call 911 and 877-860-6020

### Log Into Your MyPledge Account

Username

Password  

Remember Me

**LOG IN**

[Forgot Username](#) or [Password?](#)

[Agency Pledge Portal Registration](#)

#### Need to register a new agency?

Follow these easy steps and register today!

- Complete the online registration form
- Review, complete and return the required agreement
- Receive authorization to use the portal and activate your account
- Still have question? Check out our [FAQs](#)

Additional information and documentation can be found in the FAQs

12A-002 Agency Assistance | P.O. Box 1498 | Victorville, CA 92393-1498 [sca-sw@gas.com](mailto:sca-sw@gas.com) | 877-967-9427

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## HOME SCREEN

Once logged into the Portal, the Home Screen displays – **As of April 2021, we've enhanced your portal!**

The screenshot shows the Southwest Gas Agency Admin Home Screen. At the top, there is a navigation bar with 'Home', 'Pledges', 'Account', and 'FAQs'. Below the navigation bar, the user is greeted with 'Good Afternoon, TESTER SMITH'. The main content area features a large green card displaying 'Total Pledge Dollars Unpaid' as '\$0.00' with a 'VIEW PLEDGES' button. To the right, there is a 'Create New Pledge' form with a dropdown menu for search criteria, input fields for 'Account Number' and 'Last Name', a checkbox for authorization, and a 'SEARCH' button. Below the main card is an 'Address Verification' section with an input field and explanatory text. At the bottom right, there is a 'Request a Service Establishment Quote Letter' button. Callout boxes provide additional context: one points to the 'Pledges' link, another to the 'Agency' dropdown, a third to the search dropdown, a fourth to the 'Address Verification' section, and a fifth to the footer.

Access all your pledges information

Agency Admin can add & edit your agency's users easily

Review your customer's bill information and manage your pledges starting with their account number and either last name OR date of birth!

Verify if Southwest Gas provides service to your customer's service address

**\*\* NEW AS OF MAY 2021 \*\***

The new portal will only have ONE Administrator.  
The new Manager roll is the former "General" roll  
The new Viewer roll is the former "Inquiry Only" roll

Access to functionality is based on the user type. The single User designated as **Administrator** will have full Portal Access and will be responsible for their User's access.

The **Manager** User Roll will have access to search Southwest Gas Customer accounts, make pledges, perform address verification, and request a quote letter.

The **Viewer** User Roll will have access to search Southwest Gas Customer accounts, perform address verification, and request a quote letter.

## CUSTOMER INFORMATION SEARCH & MAKING A PLEDGE

To search for customer information, follow these steps from your portal's home screen:

The screenshot shows the Southwest Gas portal home screen. At the top, there is a navigation bar with the Southwest Gas logo, an 'Agency' dropdown, and a user profile for 'TESTER SMITH'. Below the navigation bar, there are tabs for 'Home', 'Pledges', 'Account', and 'FAQs'. The main content area displays 'Good Afternoon, TESTER SMITH' and a 'Create New Pledge' form. The form has a dropdown menu set to 'By Account Number and Last Name', input fields for 'Account Number' and 'Last Name' (containing 'Test'), a checked checkbox for 'By performing a search, I confirm written and signed authorization from the customer is on file.', and a 'SEARCH' button. Below the form is a 'Request a Service Establishment Quote Letter' section with a 'GO TO REQUEST FORM' button. A list of instructions is shown in a box on the left, and a note about the date of birth selection is in a box on the right.

- Verify a written and signed authorization form from the customer is on file with the agency
- Enter the Customer's Southwest Gas Account number
- Enter the Customer's Last name as spelled on their bill OR their Date of Birth\*
- Select the check box indicating that the agency has written and signed authorization
- Click SEARCH

\* If you use the Customer's Date of Birth, change your selection here

After successfully performing a search, you will see the Step 1: Review Customer Information page for the agency to review:

The screenshot shows the 'Make A Pledge' Step 1: Review Customer Information page. It features a progress indicator with three steps, where the first step is active. The customer's name is 'GREGORY TEST'. Below the name are fields for 'Account Number' and 'Service Address', both redacted. A list of review items is shown with dropdown arrows: 'Billing Information', 'Bill History', 'Payment History', 'Pledge History', and 'Usage'. At the bottom, there are 'CANCEL' and 'NEXT' buttons. Two blue boxes on the left provide instructions on what to do based on the review results. A list of items to be reviewed is shown in a box on the right, with red arrows pointing to the corresponding dropdowns in the screenshot.

If determined NO pledge will be made, select Cancel

If determined a pledge WILL be made, select Next

- The Current Balance
- Current and Prior Bills
- Payment History
- Pledge History
- Usage

## MAKE A PLEDGE

After selecting NEXT from Step 1: Review Customer Information page, you will be on Step 2: Pledge Amount page where the Pledge information is entered:

When entering a pledge, include:

- The Amount
- The Funding Source from the dropdown choices
- Determine if the pledge will apply to the Utility bill or the Billed Security Deposit

**Make A Pledge**

Step 2: Pledge Amount

Pledge Amount  
\$ 100.00

Funding Source  
SWG Energy Share

Apply To  
Utility Bill

BACK NEXT

You can navigate back to the prior step by selecting BACK or proceed by clicking NEXT

After selecting NEXT from Step 2: Pledge Amount page, you will be on Step 3: Review & Confirm page where the Pledge information is validated:

**Make A Pledge**

Step 3: Review & Confirm

Pledge Details

Name  
GREGORY TEST

Service Address  
[REDACTED]

Account Number  
[REDACTED]

Pledge Amount  
\$100.00

Funding Source  
SWG Energy Share

Payment Due Date  
03/09/2021

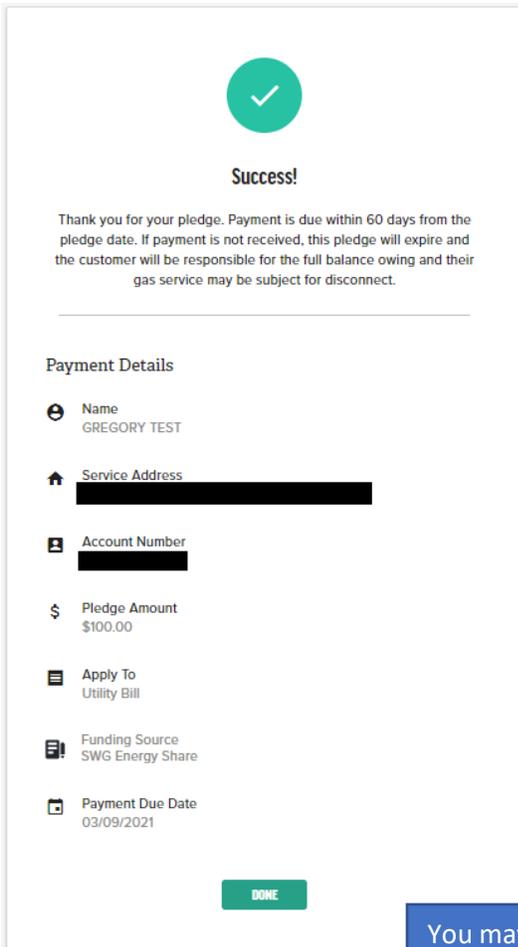
Apply To  
Utility Bill

BACK SUBMIT

Prior to submitting the Pledge, please review your entries

You can navigate back to the prior step by selecting BACK or proceed by clicking SUBMIT

After selecting SUBMIT from Step 3: Review & Confirm page you will see a Success message:



A screenshot of a success message screen. At the top center is a green circle with a white checkmark. Below it, the word "Success!" is displayed in bold. A paragraph of text follows: "Thank you for your pledge. Payment is due within 60 days from the pledge date. If payment is not received, this pledge will expire and the customer will be responsible for the full balance owing and their gas service may be subject for disconnect." Below this is a horizontal line. Underneath the line, the heading "Payment Details" is followed by a list of items, each with an icon and a label: a person icon for "Name" (GREGORY TEST), a house icon for "Service Address" (redacted with a black bar), a document icon for "Account Number" (redacted with a black bar), a dollar sign icon for "Pledge Amount" (\$100.00), a calendar icon for "Apply To" (Utility Bill), a document icon for "Funding Source" (SWG Energy Share), and a calendar icon for "Payment Due Date" (03/09/2021). At the bottom center is a green button with the word "DONE" in white.

When the Success Message is received by the Agency

- The Customer's account is noted that a pledge payment is pending
- The Customer's account is exempt from Late Charges and Disconnection for Non-payment for 60 days / due date of the Agency Pledge \*
- Correspondence will be sent to the Customer advising that Southwest Gas has received notice of the Pledge to be made by your agency

*\*If the Customer's service has already been disconnected, the Customer may be reconnected with the pending Pledge payment. Advise the Customer to contact Southwest Gas during normal business hours for further assistance.*

You may print your SUCCESS message and/or Select DONE to close this transaction

After selecting DONE from the Success screen, you will be returned to your home page:

**\*\* NEW AS OF MAY 2021 \*\***  
 You will see the pledge made added to the Agency's "Unpaid Pledges" balance  
 Select either Pledges or View Pledges for new features

After selecting View Pledges, you will see up to 2 years of Pledge History made by your Agency!

The steps for making a Pledge can be started from here too

CUSTOMER NAME	ACCOUNT	PLEDGE AMOUNT	PLEDGE DATE	EXP DATE	STATUS
GREGORY TEST	[REDACTED]	\$100.00	01/08/2021	04/08/2021	PENDING
GREGORY TEST	[REDACTED]	\$200.00	01/08/2021	04/08/2021	PENDING
GREGORY TEST	[REDACTED]	\$300.00	01/08/2021	04/08/2021	PAID

Download an excel of your pledges here!!

**\*\* NEW AS OF MAY 2021 \*\***  
 Additional Real Time Pledge Status's are now viewable by the Agency are:

- Pending – seen when a pledge is made
- Paid – is updated when a payment is received and posted by Southwest Gas's Agency Assistance
- Canceled – pledges can be canceled or Edited by the Agency
  - o When an Edit is completed, the original line will show as Canceled and a new Pledge line will be created for easy tracking
- Expired – if a Pledge is not Canceled or payment's received, the status will change to Expired after 90 days

## EDITING OR CANCELLING A PLEDGE

To **EDIT** a Pledge, select the **Kabob (3 dots)** on the line to be edited, and select **Edit**.

The screenshot shows the Southwest Gas Agency Portal. The page title is "Pledge History" and there is an "ADD NEW PLEDGE" button. A table displays the following data:

CUSTOMER NAME	ACCOUNT	PLEDGE AMOUNT	PLEDGE DATE	EXP DATE	STATUS	
GREGORY TEST	[REDACTED]	\$100.00	01/08/2021	04/08/2021	PENDING	⋮
GREGORY TEST	[REDACTED]	\$200.00	01/08/2021	04/08/2021	PENDING	
GREGORY TEST	[REDACTED]	\$300.00	01/08/2021	04/08/2021	PAID	

A dropdown menu is open for the first row, showing the following options:

- Customer Details
- Pledge Details
- Edit**
- Cancel

After selecting **Edit**, you will be on **Step 1: Pledge Details** - Enter the desired changes and Click **Next**.

The screenshots show the "Edit Pledge" form in two states. The left screenshot shows the "Pledge Amount" field set to 200.00. The right screenshot shows the "Pledge Amount" field set to 1000.00. A red arrow points from the "Pledge Amount" field in the left screenshot to the "Pledge Amount" field in the right screenshot, indicating the change.

The form includes the following fields:

- Funding Source: SWG Energy Share
- Apply To: Utility Bill
- Pledge Amount: \$ 1000.00

Buttons: CANCEL, NEXT

After selecting NEXT from Step 1: Pledge Details, you will be on Step 2: Review & Confirm page where the Pledge information is validated:

### Edit Pledge

Step 2: Review & Confirm

---

**Pledge Details**

- 👤 Name  
GREGORY TEST
- 🏠 Service Address  
████████████████████
- 🏠 Account Number  
██████████
- 📄 Funding Source  
SWG Energy Share
- 📄 Apply To  
Utility Bill
- 💰 Pledge Amount  
1,000.00

BACK
SUBMIT

After selecting SUBMIT from Step 2: Review & Confirm page you will see a success message:

Pledge successfully updated. CLOSE

Home Pledges Account ▾ FAQs

ADD NEW PLEDGE

CUSTOMER NAME	ACCOUNT	PLEDGE AMOUNT	PLEDGE DATE	EXP DATE	STATUS
GREGORY TEST	████████████████████	\$400.00	01/11/2021	04/11/2021	CANCELED
GREGORY TEST	████████████████████	\$300.00	01/11/2021	04/11/2021	PENDING
GREGORY TEST	████████████████████	\$100.00	01/11/2021	04/11/2021	CANCELED
GREGORY TEST	████████████████████	\$1,000.00	01/11/2021	04/11/2021	PENDING
GREGORY TEST	████████████████████	\$200.00	01/11/2021	04/11/2021	CANCELED
GREGORY TEST	████████████████████	\$200.00	01/11/2021	04/11/2021	CANCELED
GREGORY TEST	████████████████████	\$250.00	01/11/2021	04/11/2021	PENDING
GREGORY TEST	████████████████████	\$300.00	01/08/2021	04/08/2021	PAID
GREGORY TEST	████████████████████	\$200.00	01/08/2021	04/08/2021	CANCELED

**\*\* NEW AS OF MAY 2021 \*\***  
 After editing the pledge, you will see the initial pledge line as Canceled and a new pledge line as Pending

GREGORY TEST	████████████████████	\$1,000.00	01/11/2021	04/11/2021	PENDING
GREGORY TEST	████████████████████	\$200.00	01/11/2021	04/11/2021	CANCELED

**\*\* NEW AS OF MAY 2021 \*\***

Immediately or months from now the Agency can click on the kabob menu and select Pledge Details

GREGORY TEST	[REDACTED]	\$1,000.00	01/11/2021	04/11/2021	PENDING	⋮
GREGORY TEST	[REDACTED]	\$200.00	01/11/2021	04/11/2021	CANCELED	Customer Details Pledge Details

**Pledge Details**

**Customer Name:** GREGORY TEST      **Status:** CANCELED

**Account:** [REDACTED]

**Pledge Amount:** 200.00      **Pledge Date:** 01/11/2021

**Exp Date:** 04/11/2021      **Funding Source:** SWG Energyshare (ESHARE)

**Agency User:** Test121820      **Applied To:** UTILITY BILL

**Updated By:** Test121820      **Updated On:** 01/11/2021

[CLOSE](#)

**\*\* NEW AS OF MAY 2021 \*\***

The pop-up window will show the Agency users additional information

- The User & Date of the original pledge.
- The User & Date of the Edit/Cancellation

To CANCEL a Pledge, select the Kabob (3 dots) on the line to be edited, and select Pledge

SWITCHES

Agency

Suspect a leak? Call 911 and 877-860-6020

TESTER SMITH

Home Pledges Account FAQs

Pledge History

ADD NEW PLEDGE

CUSTOMER NAME	ACCOUNT	PLEDGE AMOUNT	PLEDGE DATE	EXP DATE	STATUS
GREGORY TEST		\$400.00	01/11/2021	04/11/2021	CANCELED
GREGORY TEST		\$300.00	01/11/2021	04/11/2021	PENDING
GREGORY TEST					
GREGORY TEST					
GREGORY TEST					
GREGORY TEST		\$200.00	01/11/2021	04/11/2021	CANCELED
GREGORY TEST		\$250.00	01/11/2021	04/11/2021	PENDING

Customer Details  
Pledge Details  
Edit  
Cancel

**\*\* NEW AS OF MAY 2021 \*\***  
- Note - only Pledges in Pending Status can be Cancelled.

After selecting Cancel, a Pop-Up to verify the request

Are you sure you want to cancel this pledge?

By choosing to cancel this pledge you will no longer be able to manage it from the agency portal.

CLOSE YES, CANCEL PLEDGE

Pledge is successfully canceled.

Home Pledges Account FAQs

Pledge History

ADD NEW PLEDGE

CUSTOMER NAME	ACCOUNT	PLEDGE AMOUNT	PLEDGE DATE	EXP DATE	STATUS
GREGORY TEST		\$400.00	01/11/2021	04/11/2021	CANCELED
GREGORY TEST		\$300.00	01/11/2021	04/11/2021	PENDING
GREGORY TEST		\$100.00	01/11/2021	04/11/2021	CANCELED
GREGORY TEST		\$1,000.00	01/11/2021	04/11/2021	PENDING
GREGORY TEST		\$200.00	01/11/2021	04/11/2021	CANCELED
GREGORY TEST		\$200.00	01/11/2021	04/11/2021	CANCELED
GREGORY TEST		\$250.00	01/11/2021	04/11/2021	CANCELED

**\*\* NEW AS OF MAY 2021 \*\***  
After selecting YES, CANCEL PLEDGE a success message will show, and the status will show as CANCELED

## 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

Address Verification

Addresses serviced by Southwest Gas will be displayed in the dropdown results.

Enter address  
5768

- 5768 AKRON CT, LAS VEGAS, NV 89142-2683
- 5768 ALYSHEBA CT, LAS VEGAS, NV 89142-1855
- 5768 BLUE SEA ST, LAS VEGAS, NV 89110-4962
- 5768 COWBOY FIDDLE CT, LAS VEGAS, NV 89131-1991
- 5768 DANISH GARDEN ST, LAS VEGAS, NV 89148-5557
- 5768 DEEP SEA CT, LAS VEGAS, NV 89110-3849

This Search function will identify partial matches. If the correct address has been enter, but not listed in the results, the address is not serviced by Southwest Gas

## SIGN OUT

To end your session, select the SIGN OUT link

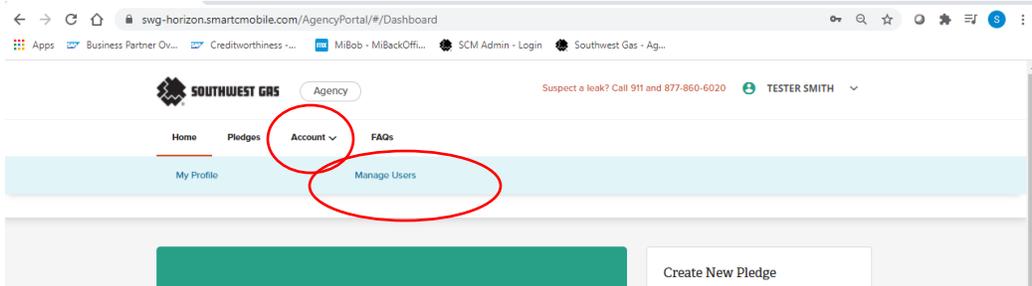
TESTER SMITH

- MY PROFILE
- SIGN OUT

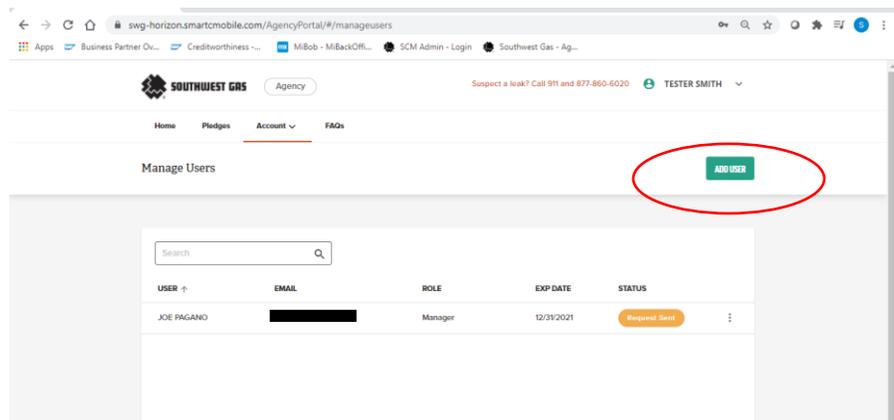
Create New Pledge

## SET UP A NEW USER – Administrator User Only

The Primary Contact is designated as the Agency's Administrator User with administrative rights and can grant Manager and Viewer Users to their Agency's Pledge Portal. The Admin User will need to log into the Portal and select the Account tab and select Manage Users



At the Manage User page, select ADD USER



### Invite A Guest User

Select Guest Role  
Manager

User's First Name  
Tester

User's Last Name  
Smith

Email Address  
Tester@TesterMail.net

Access Exp Date  
12/31/2021

CANCEL INVITE

**\*\* NEW AS OF MAY 2021 \*\***

- Enter the User Roll to be assigned
- First / Last Name
- Their e-mail address
- Enter an expiration date for the User. This can be edited and changed by the Admin User!!

The New User will receive an e-mail with a URL link to the Agency Portal for their initial set up!

## REPORTS – Administrator User Only

Agency Administrator User can download up to two years of their pledge history in an excel format:

**SOUTHWEST GAS** Agency Suspect a leak? Call 911 and 877-860-6020 TESTER SMITH

Home **Pledges** Account FAQs

Pledge History [ADD NEW PLEDGE](#)

CUSTOMER NAME	ACCOUNT	PLEDGE AMOUNT	PLEDGE DATE	EXP DATE	STATUS
GREGORY TEST		\$400.00	01/11/2021	04/11/2021	CANCELED
GREGORY TEST		\$300.00	01/11/2021	04/11/2021	PENDING
GREGORY TEST		\$100.00	01/11/2021	04/11/2021	CANCELED
GREGORY TEST		\$1,000.00	01/11/2021	04/11/2021	PENDING
GREGORY TEST		\$200.00	01/11/2021	04/11/2021	CANCELED
GREGORY TEST		\$200.00	01/11/2021	04/11/2021	CANCELED
GREGORY TEST		\$250.00	01/11/2021	04/11/2021	CANCELED
GREGORY TEST		\$100.00	01/08/2021	04/08/2021	CANCELED

[Download Pledges](#) Rows per page: 10 1-10 of 10

**\*\* NEW AS OF MAY 2021 \*\***  
From the Pledges tab, Select Download Pledges

The Agency will then be able to use excels functions to filter or arrange the data

Customer Name	Account	Pledge Amount	Pledge Date	Exp Date	Status	Applied To	Created By	Funding Source
GREGORY TEST		\$400.00	01/11/2021	04/11/2021	CANCELLED	UTILITY BILL	Test121820	SWG Low Income Bill Assistance
GREGORY TEST		\$300.00	01/11/2021	04/11/2021	PENDING	UTILITY BILL	Test121820	SWG Low Income Bill Assistance
GREGORY TEST		\$100.00	01/11/2021	04/11/2021	CANCELLED	UTILITY BILL	Test121820	SWG Energy Share
GREGORY TEST		\$1,000.00	01/11/2021	04/11/2021	PENDING	UTILITY BILL	Test121820	SWG Energy Share
GREGORY TEST		\$200.00	01/11/2021	04/11/2021	CANCELLED	UTILITY BILL	Test121820	SWG Energy Share (ESHAPE)

## SUPPORT

For questions, contact Southwest Gas Agency Assistance by:

Email: [sca-swgagencies@swgas.com](mailto:sca-swgagencies@swgas.com)

Phone: 877-967-9427