



myAccount Customer Portal

User Guide | 2025

This document is set out to assist you with navigating my**Account**. If you require additional assistance, please contact <u>portalsupport@mcdougallenergy.com</u>.

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Register for myAccount

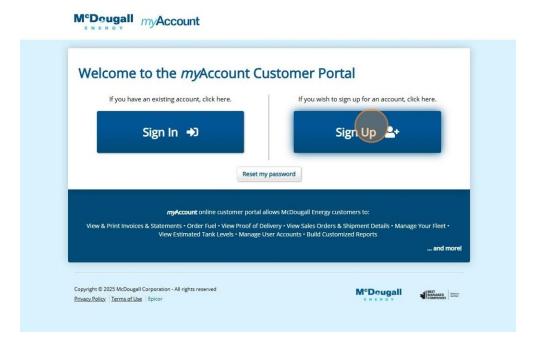
To register for the myAccount customer portal, you must be a *current account holder* with McDougall Energy. The sign-up page can be found at: https://www.mcdougallenergy.com/ or www.mcdougallenergy.com/myaccount

Encountering errors when trying to register?

If you have made multiple attempts to register with different phone numbers or invoice numbers and have double checked that your Customer ID is correct, and are still experiencing issues, please contact portalsupport@mcdougallenergy.com.

1. Visit www.mcdougallenergy.com/myaccount & click "Sign Up."

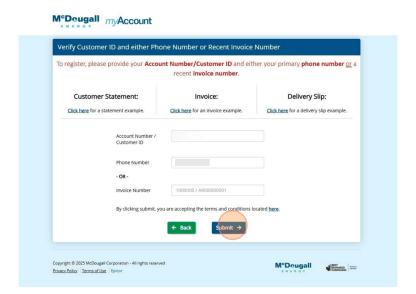
To register for myAccount must already be a McDougall Energy customer. Please ensure to have your Customer ID available for an easy sign-on. This can be found on your most recent invoice, customer statement or delivery slip.



2. Enter your "Customer ID" and either a recent invoice number or your primary contact telephone number. Then click "Submit."







3. If your account has been found, a "Great News" message will pop up. Click "Click here to continue."



*If you receive an "Oops" message, the account was unable to be located.

Please try to register again either with a new phone number or a different invoice number and double check that your Customer ID is correct with the correct number of digits.



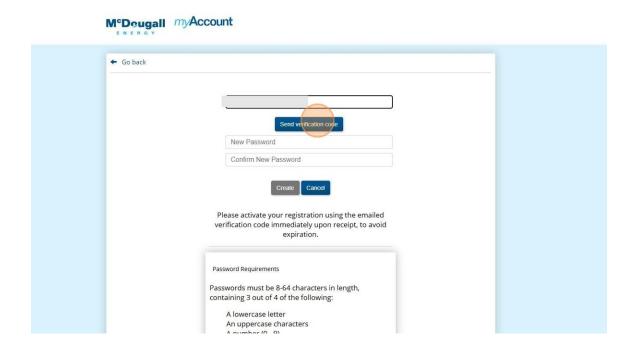


4. Before entering a password, you will need to verify your email address. Enter your email in the "Email Address" field & click "Send verification code." *Do not close your browser window.

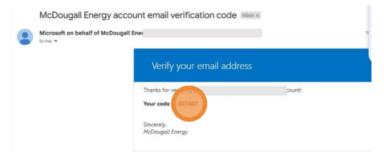
Tip!

Once you click "Send Verification Code," **you will have only 5 minutes** to obtain and verify the code. After the 5 minutes, you will need to click "Send verification code" again and us the new code that will be sent.

If you do end up accidentally closing your browser window to myAccount, you will need to click "Send verification code" again before you are able to move onto the next step & create a password.

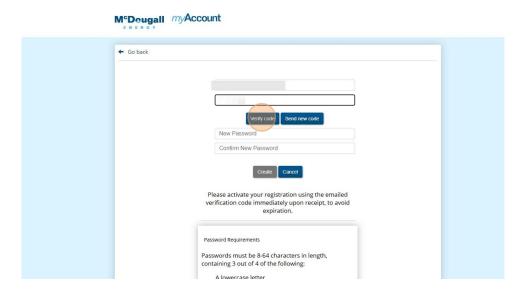


 You should receive an email from McDougall Energy in your inbox (or junk mail) that contains your verification code. Copy and paste your verification code into the Verification Code field & click "Verify Code."

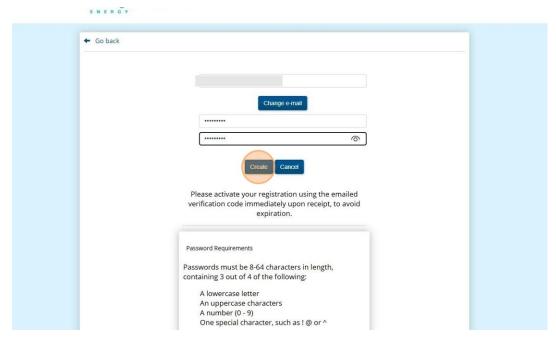








6. Once your email has been verified, you can now create a password using the details found on the "Password Hint" section and click "Create."



7. You are now ready to log in and begin using myAccount! Ensure that you keep your username (email address associated with your account) and password in a secure location for use when logging in to your account.

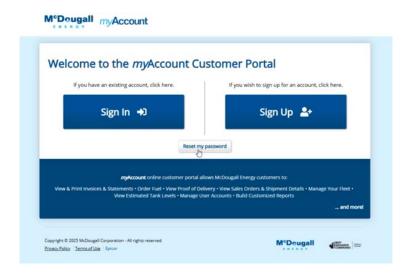
To begin using myAccount, visit www.mcdougallenergy.com/myaccount & click "Sign In."





Change your Password

1. Navigate to myAccount. Click the "reset my password" button.

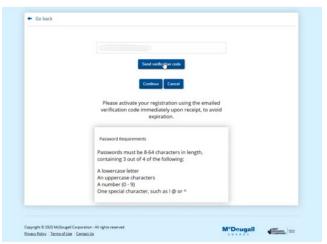


 Please enter your email address into the highlighted field. Confirm that you are entering the email address linked to your current account. click on the "Send verification code" button.
 Do not close your browser window.

Tip!

Once you click "Send Verification Code," **you will have only 5 minutes** to obtain and verify the code. After the 5 minutes, you will need to click "Send verification code" again and us the new code that will be sent.

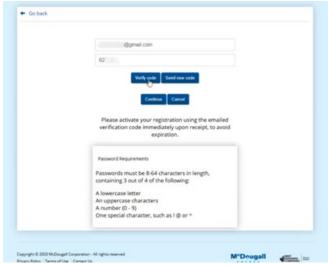
If you do end up accidentally closing your browser window to myAccount, you will need to click "Send verification code" again before you are able to move onto the next step & create a password



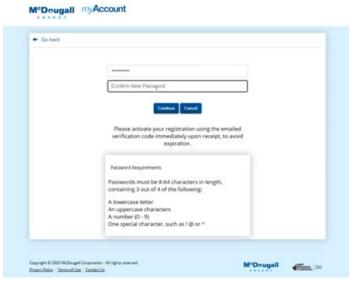




- 3. You will receive an email to the associated email from "Microsoft on behalf of McDougall Energy" with your verification code. Please make a note or copy the code for use in the next step.
- 4. Input the code that was sent to your email into the "Verification code" field. Ensure that no additional spaces are added and that the code matches the one in the email. Click "Verify Code." Once the code has been verified, click "Continue".



5. Once your email has been verified, you can now create a password using the details found in the "Password Hint" section. Click "Continue" to save your new password.



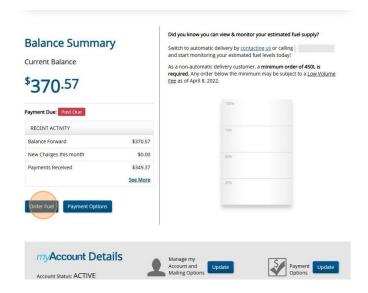
6. **Success** - Your password has been updated, and you can proceed by signing in to your account using your new password.



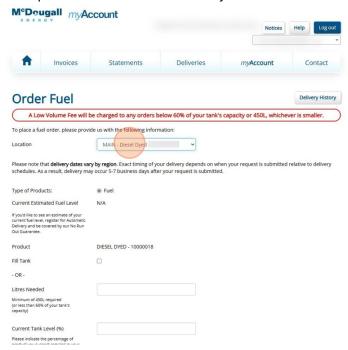


Order Fuel

1. Once you sign in, you will be directed to the homepage of myAccount. Click the "Order Fuel" button located on the screen to start the process.



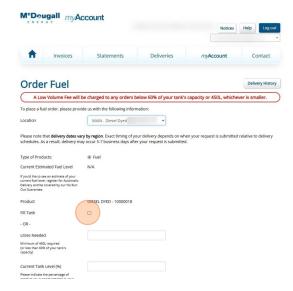
2. Click the "Location" dropdown to select the location you'd like to order fuel.





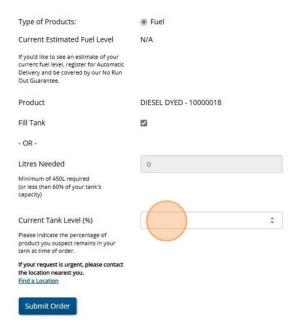


3. Click the "Fill Tank" field or enter the amount of fuel needed if known in the "Litres Needed" section.



Important Note: If you are an Automatic delivery customer, the only option available will be "Fill Tank." Please select this option if this pertains to you.

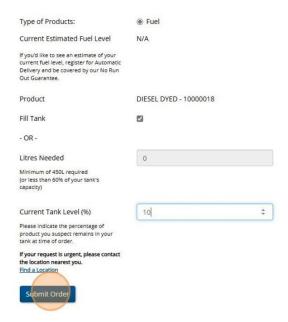
4. Enter the current estimated tank level (percentage).







5. Once you have confirmed your information above is accurate, please click the "Submit Order" button.



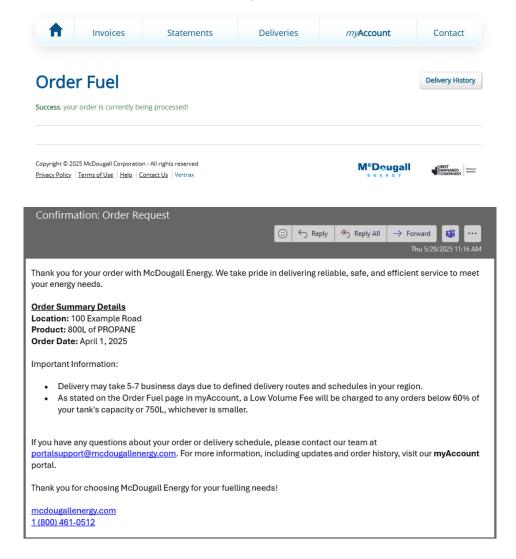
If there is already an open order associated with your account, the details will appear in the section below.







6. Once your order is submitted, a successful screen will be displayed, confirming that your order is being processed & you will receive an order confirmation email in the inbox associated with your account, confirming your request.

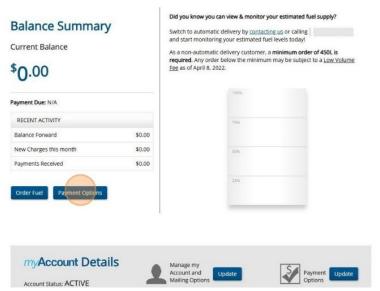




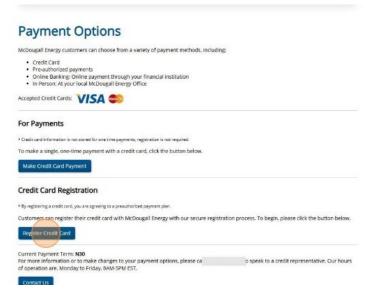


Registering a Credit Card

1. Navigate to the homepage of myAccount & click the "Payment Options" button.



If your account has been given access to register a credit card, you will see the Credit Card
Registration section on the Payment Options screen. Please click the "Register Credit
Card" button.



If you believe you should have access to register a credit card, but are unable to see the Credit Card Registration section on this page, please contact portalsupport@mcdougallenergy.com.

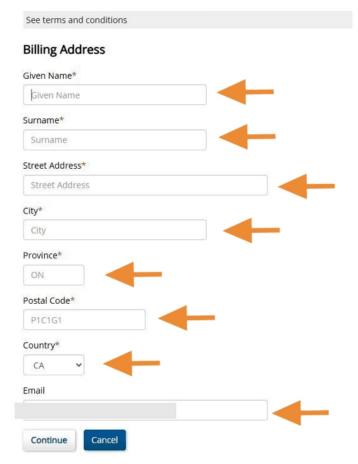




3. Click "See terms and conditions". Review the terms and conditions & click the "I agree to Terms and Conditions" field.



4. Complete all the required fields under "Billing Address" and click "Continue." Please ensure the information matches the billing address associated with the Credit Card you are looking to register.







5. Enter your Credit Card Number, Exp. Date (month/date) and Card Code (CVC) for the card you wish to register.

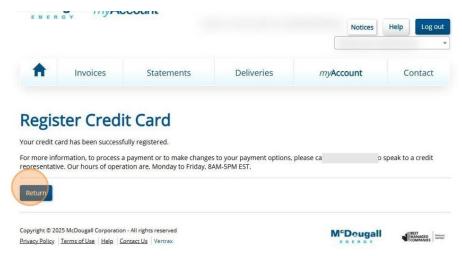


Please note we only accept Visa or MasterCard.

6. Once the information is confirmed, please click the "Submit" button.



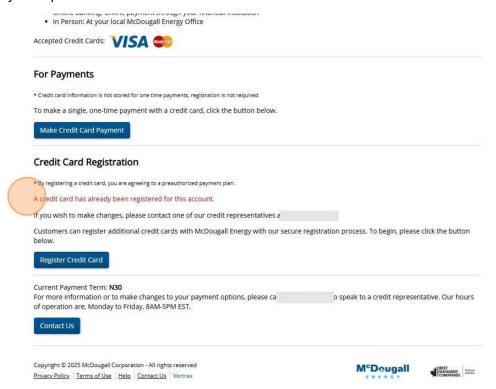
7. Once your Credit Card information has been submitted, a message should appear indicating that the Credit Card registration was successful. Click "Return."







8. When navigating back to the Payment Options screen, a red statement should appear, "a credit card has already been registered for this account" indicating that a Credit Card has been successfully registered to the account. After your Credit Card has been added, your payments will be made automatically on your next statement as per your preauthorized payment plan terms.

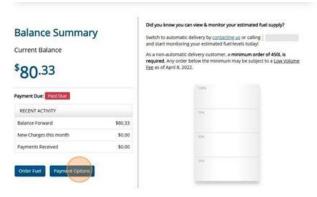




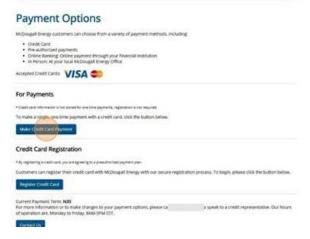


Making a Credit Card Payment

9. On the home page of your account, click "Payment Options."



10. If your account has been given access to pay via credit card, you will see the Make a Credit Card Payment section on the Payment Options screen. Click "Make Credit Card Payment".



If you believe you should have access to pay via credit card, but are unable to see the Credit Card Payment section on this page, please contact portalsupport@mcdougallenergy.com

11. Click "See terms and conditions". Review the terms and conditions & click the "I agree to Terms and Conditions" field.

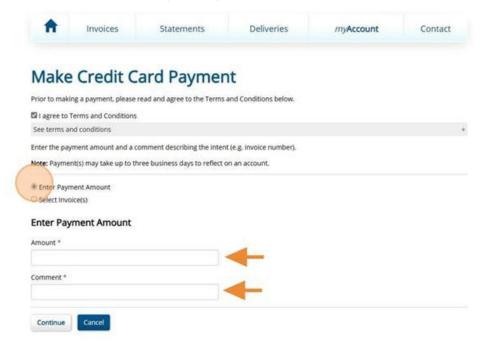




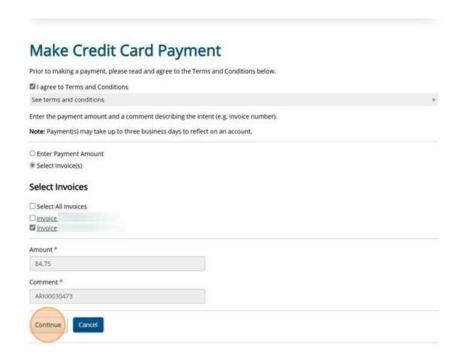


12. To make a custom amount payment, click "Enter Payment Amount" and complete the Amount field. Please enter a description of the payment in the comment field.

E.g. partial payment for invoice (000001)



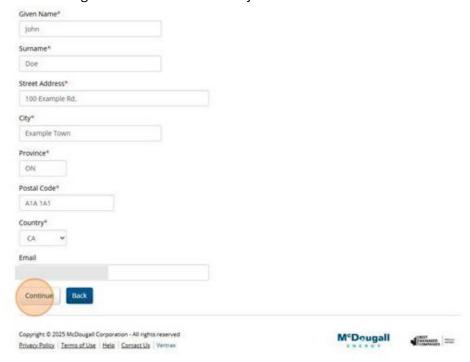
13. To select a single or multiple invoice(s), click the checkbox(s) of the specific invoice(s) you would like to pay. Click "Continue" once you have made your selection.







14. Complete the required fields for your billing address & click "Continue". Ensure the address matches the billing address associated with your Credit Card.



15. Enter your Credit Card Number, Exp. Date* (month/date) and Card Code (CVC). Once you have entered your information and ensured it is correct, click "Submit".







16. An email confirmation will be sent to you, and the screen below should indicate that a payment has been successfully processed.



Copy of the email:



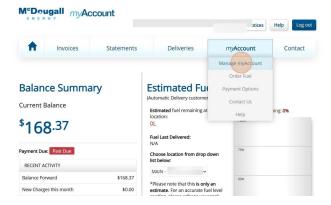
Please note that payments may take up to 3 business days to reflect on myAccount.





Register for E-Billing Notifications

1. To sign up to receive electronic invoices or statements, navigate to "myAccount" in the header & click "Manage myAccount" tab in the drop-down options.



In the new page, click the "Send statements and invoices by email" field and then "Save Changes" to confirm your selection.

Go Paperless

If you wish to start receiving your invoices and statements by email, please confirm your contact details, check the "Go Paperless" box below, and click the "Save Changes" button.

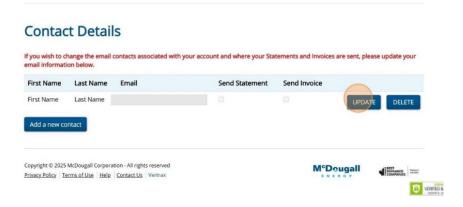
If you have not received an invoice or Statement within 30 days of choosing to "Go Paperless" please contact us at portal support@mcdougallenergy.com.

 $\textbf{NOTICE:} \ \textbf{A fee applies to paper statements and invoices sent by regular mail.}$

Send statements and invoices by email



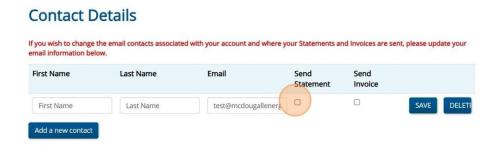
3. If you wish to update a customer who is already registered under the Contact Details, click the "Update" button.



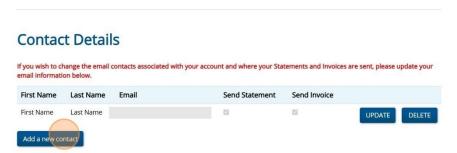




4. To send paperless statements or invoices, click the "Send Statements" and/or "Send Invoice" checkbox. Once you have confirmed your selection, click "save".



5. To add a **new contact** to the account to receive electronic copies of invoices and/or statements, click "Add a new contact."



6. Complete the "First Name, Last Name & Email" field. Click "Send Statement" &/or "Send Invoice" depending on which you would like them to receive. Click "Submit" to finalize your changes. You have now successfully updated your account to send paperless invoices &/or statements.







Print Statements

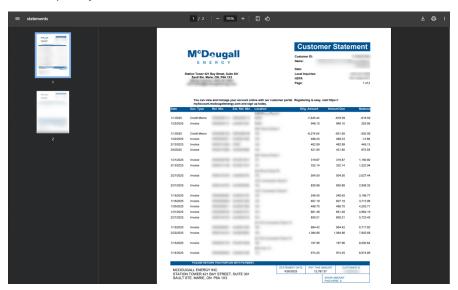
1. To view and print statements on the myAccount customer portal. Click the "Statements" header in the main navigation menu.



2. Click the drop down to select the appropriate "Month" and "Year" of the statement you'd like to view. Once you have chosen your desired month, click "View."

Statements To view a Statement, select the month and year and click "View". The Statement may take time to load. Understanding your Statement: You will notice a horizontal table at the bottom of your Statement that reads "Invoice Aging as of May 12 2025". Invoice Aging is a reflection of your current outstanding balance as of the date you are viewing the Statement. The information included in the body of the Statement and under the "Balance" section will only reflect the activity within the month you are generating a Statement for. April 2025 View

3. A new window will open in your browser. From here you can either save the statement to your device or print your statement as a PDF.

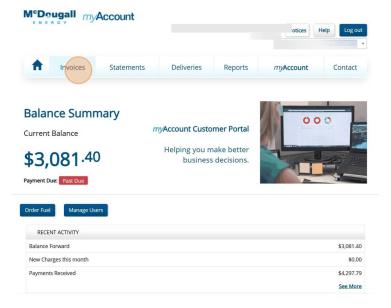




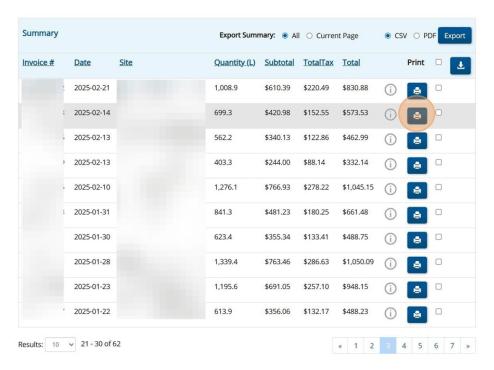


Print Invoices

1. To view and print Invoices on the myAccount customer portal. Click the "Invoices" header in the Main Navigation Menu.



2. Filter and navigate to the invoice you are looking for and click the "Print" icon next to the invoice number.







3. A new window should open with your invoice copy. You can then save the invoice to your device or print your invoice.



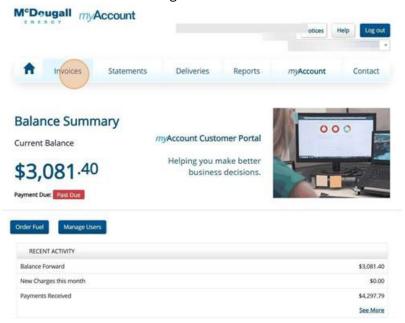




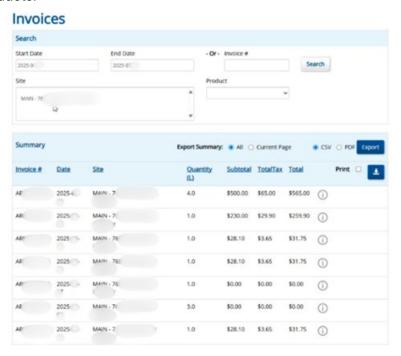


Print HST Summary Information

1. To access your HST Summary invoices on the myAccount customer portal. Click the "Invoices" header in the Main Navigation Menu.



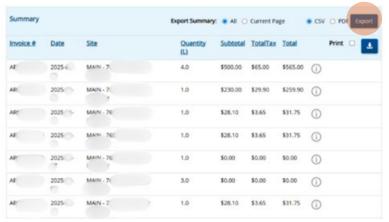
2. Select your start date and end date of the period you would like to see as well as specific sites or products.







3. Select the format that you would like to export the report either as a CSV or PDF document, and Click "Export"



4. If you export the data as a .pdf file, a new screen will open with pre-populated total HST amounts.







5. If you export the data as a .CSV file, it will automatically be downloaded to your computer. From there you will be able to calculate the HST total summary amounts using the column.







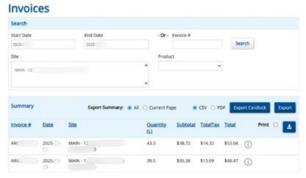
Print Detailed Cardlock Transactions

Please note that this report is only available to residential & commercial cardlock customers.

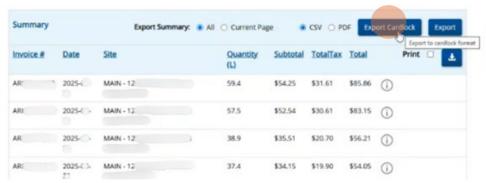
1. To access your detailed cardlock transaction information on myAccount, click the "Invoices" header in the main navigation menu.



2. Customize the "Start Date" and "End Date" to your desired time period. Once you have selected the dates you desire, click the "Search" button. This will populate all cardlock transactions from this time period.



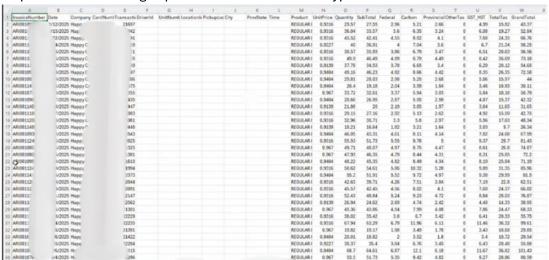
 Select the type of file you would like to export this data, either as a .CSV or .PDF file. After selecting the file type click the "Export Cardlock" button. The export will download to your device.







4. We recommend exporting your cardlock report as a .CSV. This will give you additional options to filter though specific fleet cards or card types.



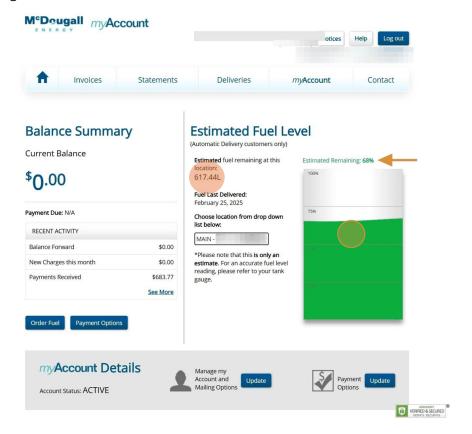




View Estimated Tank Levels

Currently, fuel level details are **only available to residential automatic delivery customers**. Customers with tank monitoring will see actual fuel levels while customers without tank monitors will see their estimated fuel levels.

Log into myAccount and visit the "Home" screen. Select the property/location for which you
would like to view the "Estimated Fuel Level." You will note the estimated fuel level by
percentage as well as the Litre value.

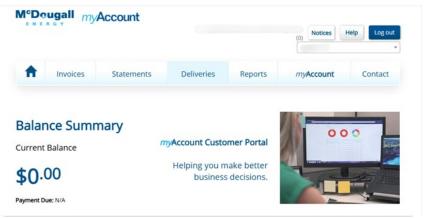






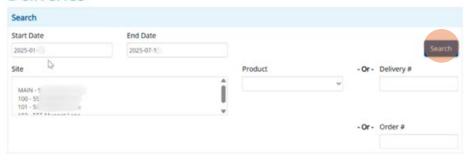
Delivery Details

1. To view details of deliveries in myAccount, click the "Deliveries" header in the main navigation menu.



2. You have the ability to filter for specific deliveries by using "Start Date", "End Date", "Site/Location", "Product", "Delivery Number" or "Order Number" & click "Search.

Deliveries



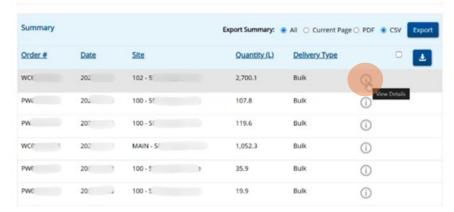
3. For customers with multiple sites/locations & products, a visual doughnut graph comparing total product volume by site will populate.







4. General delivery details will be made available under the "Summary" section of the Deliveries screen including Order #, Date, Site, Quantity in Litres & Delivery type. To view additional details on a specific delivery, please click the "I" Information icon.



5. Additional details such as "Part #", "Product type", and "Invoice #" will be made available. To view the invoice associated with your delivery, click the underlined invoice number.

