

Account Manager Demo

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Membership Process and Services

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Overview User Registration Process

Review of Security Updates

Additional Information

Demonstration of a User's Profile

Demonstration of a CAM's Profile

Go to [pjm.com](https://www.pjm.com) > Markets & Operations > PJM Tools > [Account Manager](#).

Enter your company email address in the prompt.

- 1 **Email**
- 2 Contact Information
- 3 Main Account
- 4 Subaccounts
- 5 Main Account Access
- 6 Subaccount Access
- 7 Review

To register for a PJM account, please complete the following information. If you already have an account, please [sign in](#).

If you would like to register for a System Account, use this [form](#).

Email Verification

Enter your company email address *

Click **Next**.

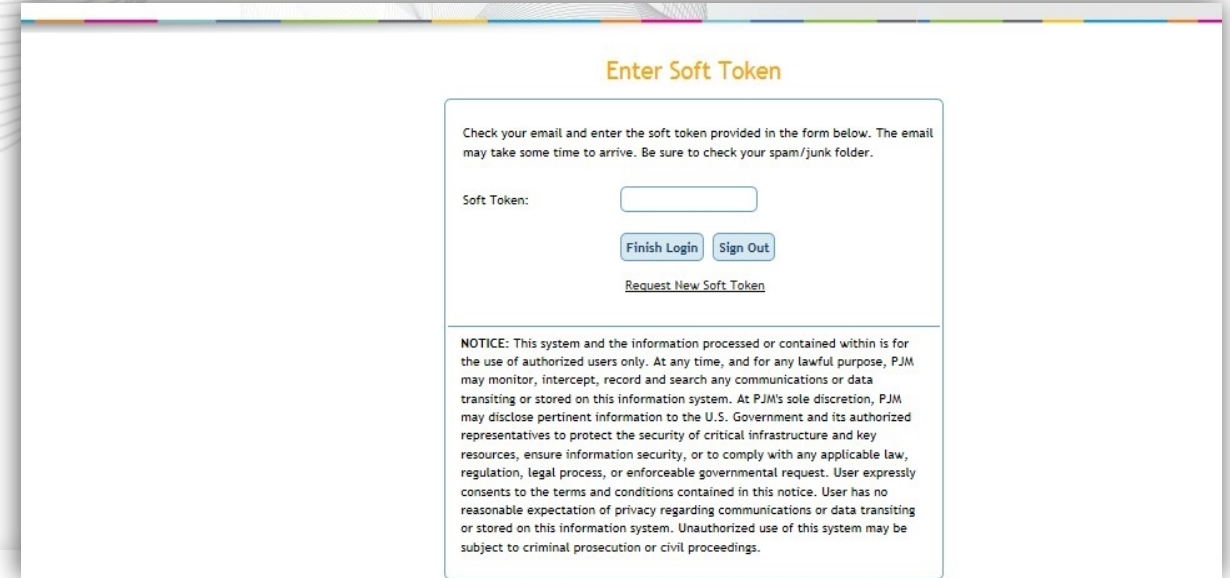
Next

NEW After inputting your email, you will be prompted to enter a soft token to verify the email address.

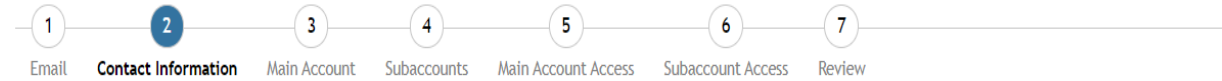
Check your email associated with the user account in Account Manager for the soft token.

PJM Account Manager Soft Token
Account Manager_STG <accountmanager-donotreply@pjm.com>
Sent: Mon 10/16/2017 12:08 PM
To:
Hello ,
**You have requested a Soft Token for
Your Soft Token is 08188826**
Please return to your browser and enter this token into the form to finish your login.
Note that this Soft Token will expire in 10 minutes.

Please check your spam/junk folder if the automated soft token email is not in your inbox before clicking **Request New Soft Token** link.



The screenshot shows a web browser window with a tab titled "Enter Soft Token". The page content includes a heading "Enter Soft Token" in orange. Below it is a paragraph: "Check your email and enter the soft token provided in the form below. The email may take some time to arrive. Be sure to check your spam/junk folder." This is followed by a "Soft Token:" label and a text input field. Below the input field are two buttons: "Finish Login" and "Sign Out". Below these buttons is a link: "Request New Soft Token". At the bottom of the form is a "NOTICE" section with a paragraph of legal text.



Sign In Information

Username * CHoliday15

Between 6 and 12 characters
First character cannot be a special character. Allowed special characters are ()!\$%^&_{}~

Email * carter.holiday@pjm.com

⚠️ Your email address is already associated with a PJM account.

Warning: This warning will not prevent you from creating a new user account; however, if you have an existing user account, please log in to your current account.

Contact Information

First Name * Carter

Job Title * PJM Tester

Last Name * Holliday

Phone * -610-555-1212

Security Questions

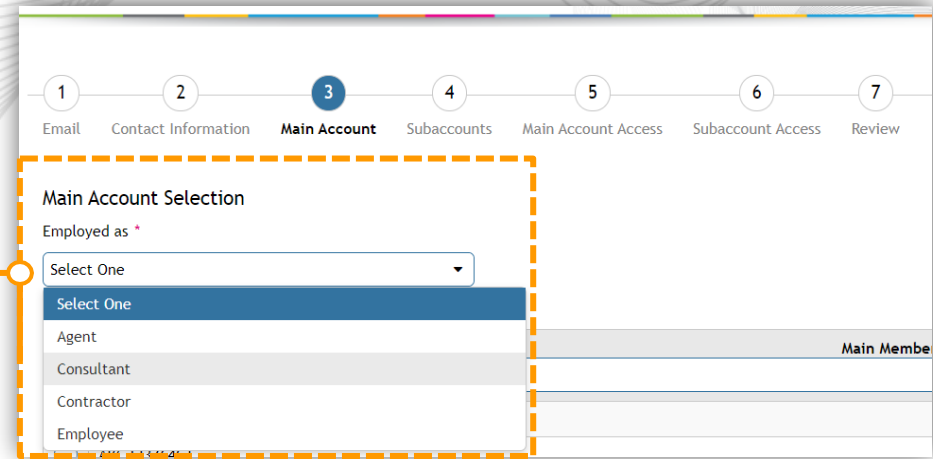
For your protection, these will help us verify your identity in the future.
Answer a minimum of 3 questions below. Capitalization is not important.

Show Security Answers ☐

Q1 * Who is your favorite basketball team?
Q2 * What is/was the make and model of your first car?
Q3 * What is the name of your current pet?

Back Next

Select your relationship to the main company account in the **Employed as** field.



1 Email 2 Contact Information 3 **Main Account** 4 Subaccounts 5 Main Account Access 6 Subaccount Access 7 Review

Main Account Selection

Employed as *

Select One

Select One

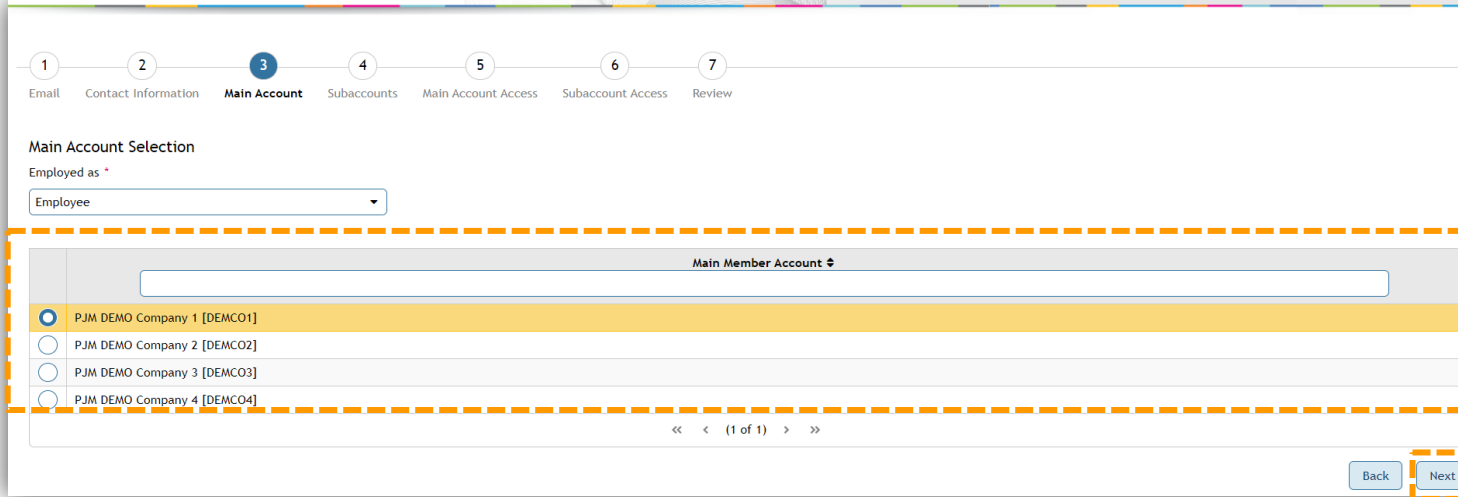
Agent

Consultant

Contractor

Employee

Main Member



1 Email 2 Contact Information 3 **Main Account** 4 Subaccounts 5 Main Account Access 6 Subaccount Access 7 Review

Main Account Selection

Employed as *

Employee

Main Member Account

☒	PJM DEMO Company 1 [DEMC01]
☐	PJM DEMO Company 2 [DEMC02]
☐	PJM DEMO Company 3 [DEMC03]
☐	PJM DEMO Company 4 [DEMC04]

« < (1 of 1) > »

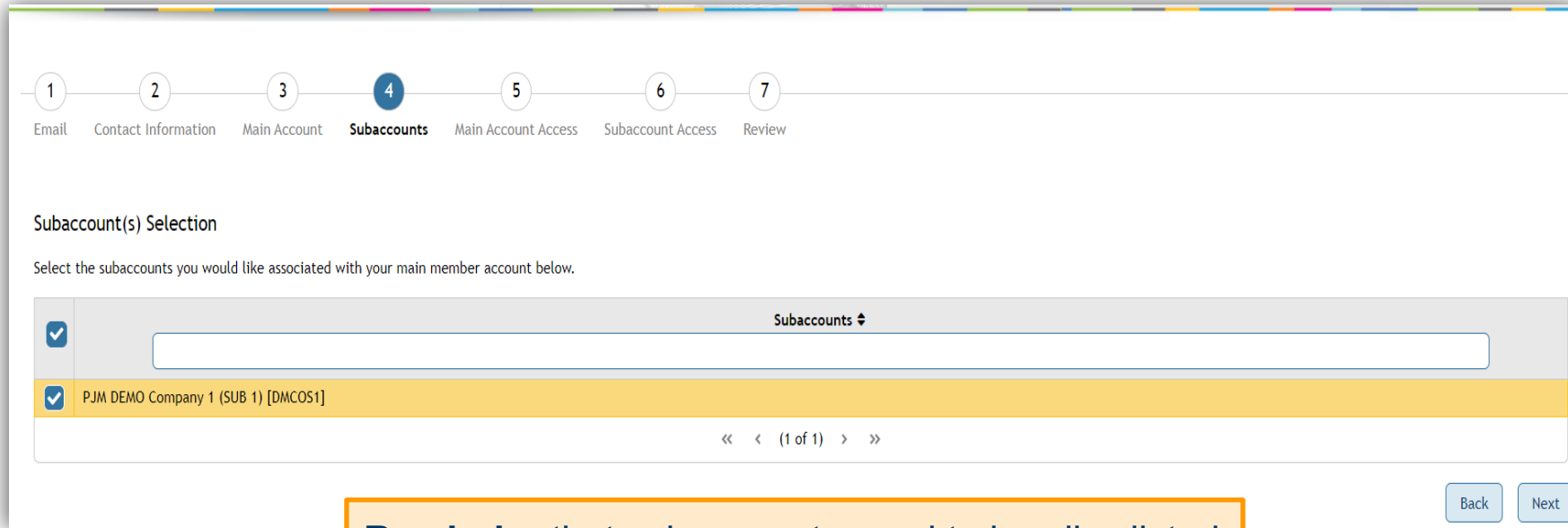
Back Next

Select the main member company account.

Click **Next**.

If the main company account has subaccounts, it will proceed to the *Subaccount(s) Selection* screen, or, if the main company account has no subaccounts, it will proceed to the *Tools Selector* screen for the main company account.

On the *Subaccount(s) Selection* screen, you can select one, multiple or all subaccounts, and then click **Next**.



The screenshot shows a multi-step registration process. The progress bar at the top indicates seven steps: 1. Email, 2. Contact Information, 3. Main Account, 4. Subaccounts (current step), 5. Main Account Access, 6. Subaccount Access, and 7. Review. Below the progress bar, the title 'Subaccount(s) Selection' is followed by the instruction 'Select the subaccounts you would like associated with your main member account below.' A table with one row shows a checked checkbox and the text 'PJM DEMO Company 1 (SUB 1) [DMCOS1]'. A search bar labeled 'Subaccounts' is positioned above the table. At the bottom right of the form are 'Back' and 'Next' buttons.

Reminder that subaccounts need to be allowlisted to appear on the *Subaccount(s) Selection* screen.

1 Email 2 Contact Information 3 Main Account 4 Subaccounts 5 **Main Account Access** 6 Subaccount Access 7 Review

Request Access for Main Company Account
Select the tools below for which you will need access to.

Access

- Markets Gateway Generator Read Write
- Markets Gateway Load Read Only
- Markets Gateway Load Read Write
- Planning Center Gen Model Read Only
- Planning Center Gen Model Read Write
- Planning Center Queue Point Read Only
- Planning Center Queue Point Read Write
- Power Meter Read Only
- Power Meter Read/Write
- Resource Tracker Read Only

Selected Access

- Voting Read/Write
- eCredit Read/Write
- eCredit Read Only
- eCredit R/W with Collateral
- MSRS Read Only
- PJM Public
- Member Community Public**

Comments

Please use the comments field to provide information to the Company Account Manager to help determine what access you require.

Back Next

Assign tool access for the main account by selecting the tool name under Access then clicking the center **double-arrow** icon to add Selected Access. Click **Next** to proceed.

1 Email 2 Contact Information 3 Main Account 4 Subaccounts 5 Main Account Access 6 **Subaccount Access** 7 Review

Request Access for Subaccount(s)

Actions	Subaccounts	Access Selected
	PJM DEMO Company 1	None

Select tool access for subaccounts by clicking the **pencil** icon in the *Actions* column.

Only SUMA-enabled tools will be available to select for the subaccount.

Select Access for Subaccount PJM DEMO Company 1 (SUB 1)

Access

- Billing Line Item Transfer Read Only
- Billing Line Item Transfer Read/Write
- Bulletin Board Read Only
- Bulletin Board Read/Write
- Capacity Exchange Read Only
- DR Hub CSP Full Member
- DR Hub Read Only
- DR Hub Read/Write
- ExSchedule Read Only
- ExSchedule Read/Write

Selected Access

- Capacity Exchange Read/Write
- MSRS Read Only
- Markets Gateway Generator Read Write
- InSchedule Read/Write

InSchedule (formerly known as eSchedules) is an Internet application used by Power Marketers, Load Serving Entities (LSEs) and Generation Owners in PJM to submit their internal PJM energy schedule data. All PJM internal transactions, including load and generation interchange adjustment modeling and implicit internal Spot Market schedules are handled through the PJM InSchedule system

Comments

Please use the comments field to provide information to the Company Account Manager to help determine what access you require.

Cancel Submit

Assign tool access for the subaccount by selecting the tool name under Access then clicking the center **double-arrow** icon to add Selected Access. Click **Submit**.

These steps will need to be repeated for each selected subaccount.

1

2

3

4

5

6

7

Email

Contact Information

Main Account

Subaccounts

Main Account Access

Subaccount Access

Review

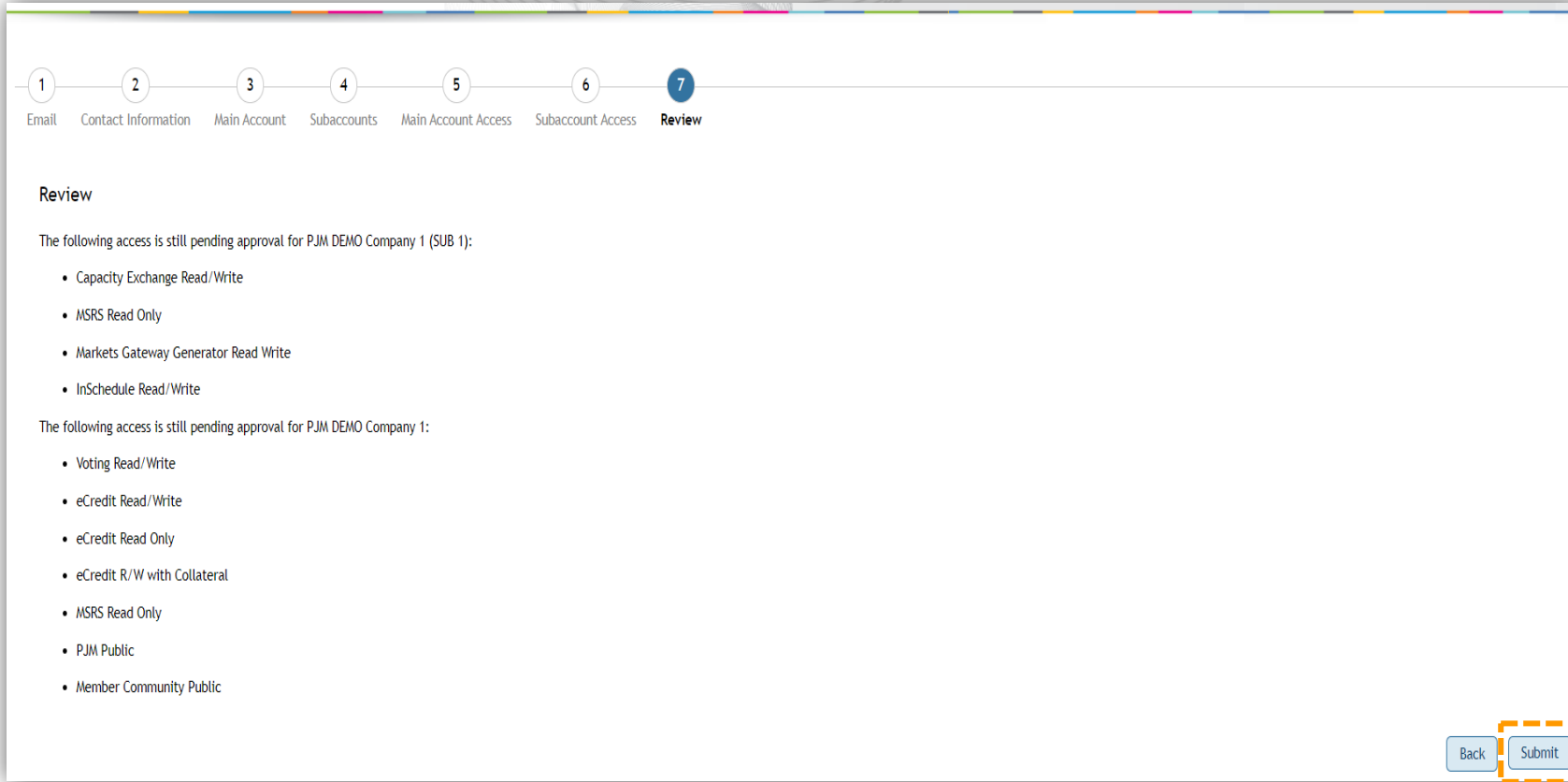
Request Access for Subaccount(s)

Select the subaccount and select the tools below for which you will need access to.

Actions	Accounts	Access Selected
	PJM DEMO Company 1 (SUB 1) [DMCOS1]	Capacity Exchange Read/Write, MSRS Read Only, Markets Gateway Generator Read Write, InSchedule Read/Write

Back

Next



The image shows a screenshot of a web application's user registration process, specifically the 'Review' step. At the top, a horizontal progress bar contains seven numbered circles. Circles 1 through 6 are white with black outlines, while circle 7 is solid blue with a white outline. Below each circle is a label: 'Email', 'Contact Information', 'Main Account', 'Subaccounts', 'Main Account Access', 'Subaccount Access', and 'Review'. The 'Review' label is bolded. The main content area is titled 'Review' and contains two sections of text, each followed by a bulleted list of access permissions. The first section states 'The following access is still pending approval for PJM DEMO Company 1 (SUB 1):' and lists four items: 'Capacity Exchange Read/Write', 'MSRS Read Only', 'Markets Gateway Generator Read Write', and 'InSchedule Read/Write'. The second section states 'The following access is still pending approval for PJM DEMO Company 1:' and lists seven items: 'Voting Read/Write', 'eCredit Read/Write', 'eCredit Read Only', 'eCredit R/W with Collateral', 'MSRS Read Only', 'PJM Public', and 'Member Community Public'. At the bottom right, there are two buttons: 'Back' and 'Submit'. The 'Submit' button is highlighted with a dashed orange border.

1 2 3 4 5 6 7
Email Contact Information Main Account Subaccounts Main Account Access Subaccount Access **Review**

Review

The following access is still pending approval for PJM DEMO Company 1 (SUB 1):

- Capacity Exchange Read/Write
- MSRS Read Only
- Markets Gateway Generator Read Write
- InSchedule Read/Write

The following access is still pending approval for PJM DEMO Company 1:

- Voting Read/Write
- eCredit Read/Write
- eCredit Read Only
- eCredit R/W with Collateral
- MSRS Read Only
- PJM Public
- Member Community Public

Back Submit

Demonstration of Account Manager User and CAM profiles.

- User's can access Account Manager via PJM.com > Markets & Operations > PJM Tools > Account Manager.
- All user guides regarding Account Manager are located at the bottom of the Account Manager page on PJM.com
- Any questions in relation to the Account Manager tool can be sent to AccountManager@pjm.com

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Account Manager Demo



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