

# Kraken Account guide

Last Modified on 12/18/2025 2:20 pm EST

## Kraken Account: Good Egg Energy's Operating System

Welcome to your guide on Kraken, Good Egg Energy's powerful technology platform that powers everything from customer billing to account management. Understanding Kraken is essential to providing excellent customer service.

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### What is Kraken?

Kraken is Good Egg Energy's comprehensive operating system—an AI-powered platform that manages all aspects of our energy retail operations. Think of it as the "brain" behind our company, connecting customers, billing, usage data, communications, and operations into one seamless system.

#### Key capabilities:

- Customer account management
- Billing and invoicing
- Meter data processing
- Payment processing
- Customer communications
- Usage analytics and reporting
- Field operations management
- Smart meter integration

Kraken was developed by Octopus Energy and is now used by major energy companies worldwide, managing over 70 million customer accounts globally. Good Egg Energy licenses this technology to deliver world-class service to our customers.

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### Why We Use Kraken

#### For Our Customers

##### Better service

- 24/7 online account access
- Real-time usage data and insights
- Flexible payment options
- Fast, accurate billing
- Personalized energy recommendations

##### Innovation

- Smart tariff options
- Time-of-use rate plans

- Paperless billing with detailed breakdowns
- Mobile app integration
- Automated alerts and notifications

## For Our Agents

### Efficiency

- All customer information in one place
- Automated workflows reduce manual work
- AI-powered tools assist with responses
- Quick access to account history
- Streamlined billing dispute resolution

### Accuracy

- Real-time data updates
  - Automated meter readings from smart meters
  - Reduced billing errors
  - Integrated payment tracking
  - Comprehensive audit trails
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## Accessing Kraken

### Login Information

All Good Egg Energy agents receive Kraken access credentials on their first day. You'll use these to log in to the Kraken portal.

**Portal URL:** <https://kraken.goodeggenenergy.com>

**Login credentials:** Provided by IT during onboarding

**Password requirements:** Must be changed every 90 days

**Important:** Never share your Kraken login credentials with anyone, including other agents. Each agent has their own account for security and audit purposes.

### Your Dashboard

When you first log in, you'll see your agent dashboard which includes:

#### Quick stats:

- Active cases assigned to you
- Pending tasks
- Recent account interactions
- Today's call volume metrics

#### Search bar:

- Search by account number, customer name, address, phone number, or email
- Quick access to any customer account

#### Navigation menu:

- Accounts
  - Billing
  - Payments
  - Communications
  - Reports
  - Settings
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## Key Kraken Features for Agents

### 1. Customer Account Management

**Account Overview** Every customer account in Kraken displays:

- Account number and status
- Service address and billing address
- Contact information (phone, email)
- Rate plan and tariff details
- Payment method on file
- Account balance (current and past due)
- Payment history
- Billing preferences (paper vs. paperless)

**Account Timeline** Shows a chronological history of all interactions:

- Bills generated
- Payments received
- Service calls and visits
- Communication sent/received
- Account changes and updates
- Notes added by agents

### 2. Billing Information

#### Current and Historical Bills

- View any bill ever generated for the account
- See detailed charge breakdowns
- Compare billing periods
- Download PDFs of bills
- Generate duplicate bills for customers

**Usage Data** For customers with smart meters:

- Daily, weekly, and monthly usage charts
- Hour-by-hour consumption data
- Cost projections based on current usage
- Comparison to similar homes
- Seasonal usage patterns

### 3. Payment Processing

#### Recording Payments

- Process phone payments directly in Kraken

- Apply payments to specific bills or balance
- Issue refunds for overpayments
- Set up payment arrangements
- Update payment methods

#### **Payment Status Tracking**

- See pending ACH/check payments
- Track payment failures and returns
- Monitor auto-pay status
- View payment confirmation numbers

## **4. Communications Hub**

#### **Send Communications**

- Email customers directly from Kraken
- SMS notifications (for enrolled customers)
- Generate letters (disconnection notices, etc.)
- All communications are logged and tracked

#### **Communication Templates**Pre-written templates for common scenarios:

- Bill payment reminders
- Service appointment confirmations
- Rate change notifications
- Payment arrangement terms
- Dispute acknowledgments

#### **Communication History**View all outbound and inbound communications:

- Emails sent and received
- SMS messages
- Letters mailed
- Phone call logs (when integrated)

## **5. Case Management**

#### **Creating Cases**Document and track customer issues:

- Billing disputes
- Service requests
- Complaint escalations
- Meter test requests
- Account investigations

#### **Case Tracking**

- Assign cases to specific teams or agents
- Set priority levels
- Add notes and updates
- Attach supporting documents
- Track resolution time

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## **Common Kraken Tasks for Agents**

## Looking Up a Customer Account

1. Use the search bar at the top of any page
2. Enter account number, name, phone, email, or address
3. Select the correct account from search results
4. Review account overview before proceeding

**Pro tip:** If multiple results appear, verify the service address with the customer to ensure you're looking at the right account.

## Reviewing a Bill

1. Navigate to the customer's account
2. Click "Billing" tab
3. Select the bill in question
4. Review the detailed charge breakdown
5. Compare to previous bills if needed
6. Use the "Usage" tab to see consumption data

## Processing a Payment

1. From the account overview, click "Take Payment"
2. Select payment method (card, bank account, check)
3. Enter payment amount
4. Add customer's payment details
5. Confirm and process
6. Provide confirmation number to customer

**Important:** Always read back the confirmation number to the customer and let them know when the payment will post to their account.

## Setting Up a Payment Arrangement

1. Navigate to "Payment Arrangements" in the account menu
2. Click "Create New Arrangement"
3. Enter down payment amount (typically 25% of past due)

4. Set installment amount and frequency
5. Review terms with customer
6. Save and generate agreement letter
7. Email or mail terms to customer

## Updating Account Information

### Contact Information:

- Click "Edit" next to contact details
- Update phone, email, or mailing address
- Save changes
- Verify with customer

### Billing Preferences:

- Navigate to "Billing Settings"
- Update paper/paperless preference
- Update billing address if different from service address
- Enable/disable auto-pay

## Creating Notes

Document every customer interaction:

1. Click "Add Note" in the account timeline
2. Select note type (General, Billing, Payment, Service)
3. Write clear, detailed notes
4. Save note—it will appear in the timeline

**Good note example:** "Customer called regarding 11/15 bill showing \$243. Explained usage increase due to colder weather in November vs October. Customer used 1,100 kWh this month vs 850 last month. Reviewed daily usage data with customer. Customer understood explanation. No adjustment needed."

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## Kraken AI-Powered Features

### Smart Responses

Kraken uses AI to help agents draft responses to customer emails and inquiries:

#### How it works:

1. When a customer email comes in, Kraken analyzes the content
2. The system suggests a response based on the inquiry

3. Agent reviews, edits, and personalizes the response
4. Agent sends the response with one click

**Important:** Always review and personalize AI-suggested responses. Never send them without reading them first.

## Predictive Analytics

Kraken analyzes usage patterns to:

- Flag unusual consumption spikes
- Predict high bill alerts
- Identify customers likely to struggle with payment
- Recommend proactive outreach opportunities

## Automated Workflows

Certain tasks are automated:

- Bill generation on cycle dates
  - Auto-pay processing
  - Late payment reminders
  - Disconnection notice generation
  - Smart meter data collection
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## Account Status Indicators

Kraken uses color-coded status indicators:

**Green:** Account in good standing

- Current on payments
- No issues or holds

**Yellow:** Account needs attention

- Approaching due date
- Payment arrangement in place
- Pending investigation

**Red:** Account at risk

- Past due balance
- Disconnection pending
- Returned payment
- Active dispute

**Gray:** Account inactive

- Service disconnected
  - Account closed
  - Seasonal hold
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# Reporting and Analytics

## Agent Reports

Available reports in Kraken:

- Daily call volume and resolution stats
- Average handle time
- Customer satisfaction scores
- Payment collection metrics
- Case closure rates

## Account Reports

Generate reports for specific customers:

- 12-month usage history
  - Payment history
  - Communication log
  - Billing comparison reports
  - Rate analysis
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# Security and Compliance

## Data Protection

**What you can access:**

- Only accounts you need for your current work
- Customer personal information is encrypted
- Payment data is PCI-compliant

**What you cannot do:**

- Access accounts without a business reason
- Share customer information outside of work
- Discuss customer accounts outside of Kraken
- Export customer data without authorization

## Audit Trails

Every action in Kraken is logged:

- Who accessed an account and when
- What changes were made
- What information was viewed
- All communications sent

**This protects both customers and agents by maintaining a complete record of all activities.**

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## Mobile Access

Kraken is accessible on tablets and smartphones for field agents:

**Mobile capabilities:**

- Look up customer accounts
- View billing information
- Process payments
- Update service appointments
- Add notes and photos
- Access customer contact information

**Not available on mobile:**

- Complex billing adjustments
  - Bulk account updates
  - Advanced reporting
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## Integration with Other Tools

Kraken connects with other systems we use:

**Smart Meters**

- Automatic daily meter readings
- Real-time usage data
- Remote connection/disconnection capability

**Payment Processors**

- Credit card processing
- ACH/bank transfers
- Payment confirmation notifications

**Email Systems**

- Send/receive customer emails
- Track email opens and clicks
- Template management

**Field Service Tools**

- Service appointment scheduling
  - Technician dispatch
  - Job completion tracking
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## Common Kraken Issues and Solutions

### System Running Slowly

**Causes:**

- Too many browser tabs open
- Cache needs clearing
- System maintenance

**Solutions:**

- Close unnecessary tabs
- Clear browser cache
- Check system status page
- Contact IT if persistent

## Can't Find a Customer Account

### Troubleshooting:

- Try different search terms (name vs address vs phone)
- Check for spelling variations
- Verify account number with customer
- Search by service address instead of billing address
- Contact supervisor if account truly missing

## Payment Won't Process

### Common issues:

- Incorrect payment details entered
- Card declined by bank
- ACH verification failed
- Payment amount exceeds limits

### Solutions:

- Verify all payment information with customer
  - Try alternative payment method
  - Check error message for specific issue
  - Escalate to payment processing team if needed
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## Best Practices for Using Kraken

### 1. Always Verify the Account

Before making any changes, confirm you're in the correct customer account.

### 2. Document Everything

Add notes for every customer interaction, even if it seems minor.

### 3. Use Templates When Appropriate

Don't reinvent the wheel—use approved templates for common communications.

### 4. Review Before Sending

Always review AI-generated or template responses before sending to customers.

### 5. Keep Information Current

Update contact information and preferences as customers inform you of changes.

## 6. Respect Privacy

Only access accounts when you have a legitimate business need.

## 7. Stay Organized

Use cases to track ongoing issues and keep your work organized.

## 8. Ask for Help

If you're unsure how to do something in Kraken, ask a supervisor or check the knowledge base.

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# Kraken Training Resources

### Initial Training

- New agent onboarding includes 3 days of Kraken training
- Hands-on practice with test accounts
- Certification quiz before going live

### Ongoing Learning

- Monthly Kraken tips and tricks sessions
- Knowledge base articles: <https://kb.goodeggenergy.com>
- Video tutorials available in the training portal
- Peer mentoring program

### Support Channels

- IT Help Desk: ext. 3000 (technical issues)
  - Supervisor: escalations and complex cases
  - Kraken Super Users: in-depth questions
  - Team Slack channel: quick questions
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# Future Kraken Enhancements

Good Egg Energy continuously works with Kraken to improve our platform. Upcoming features include:

- Enhanced mobile app functionality
- More AI-powered customer insights
- Improved usage visualization tools
- Expanded self-service capabilities
- Integration with additional smart home devices

**Stay informed:** New feature announcements are shared in weekly team meetings and via email.

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# Quick Reference: Kraken Navigation

**To find:** Customer account → Use search bar

**To view:** Bills → Account > Billing tab

**To see:** Usage data → Account > Usage tab

**To process:** Payment → Account > Take Payment

**To create:** Payment arrangement → Account > Payment Arrangements > Create New

**To send:** Email → Account > Communications > Compose

**To add:** Note → Account Timeline > Add Note

**To create:** Case → Account > Cases > New Case

**To update:** Contact info → Account > Edit Details

**To change:** Billing preferences → Account > Billing Settings

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## Remember

Kraken is a powerful tool that helps us deliver exceptional service to our customers. The more comfortable you become with its features and capabilities, the more efficient and effective you'll be as an agent.

### **Kraken allows us to:**

- Serve customers faster
- Make fewer errors
- Provide personalized service
- Track and resolve issues efficiently
- Build stronger customer relationships

Take time to explore Kraken, ask questions, and utilize all of its capabilities. You'll quickly discover how it makes your job easier and helps you provide the best possible service to Good Egg Energy customers.

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**Last updated:** December 2024

**Version:** 1.0

**Questions?** Contact IT Support at [itsupport@goodeggenergy.com](mailto:itsupport@goodeggenergy.com) or ext. 3000

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