SSE BUSINESS
ENERGY CENTRE

Detailed user instructions

sse Energy Solutions

For a better world of energy

CONTENTS

REGISTER FOR AN ONLINE ACCOUNT

To register for an online account on the SSE Business Energy website please go to the sign-up page: https://ssebusiness.co.uk/signup.

- Select user type as "TPI/Energy Consultant" and fill out the remaining part of the form.
- Once registered you'll receive a verification email within couple of minutes.
- It may appear that the email contains an empty green box; please click in this box as it contains a link, to verify your account.
- You'll receive a message confirming your email address has been verified. However, you will not be able to log until one of our Website Support Team approves your profile. You'll receive an automated email when this is completed: generally, within one working day.

If you have any problems with registration, please get in touch with us at sse.business@sse.com.

PASSWORD UPDATE – FROM WITHIN USER LOGIN

Your password can be updated from within the online account. This password change will not require you to answer the security question.
To update your password after you've logged into your online accounts please follow the steps below:

- Click on the Settings icon in the top right corner of the page (right next to the logout button).
- Select the Change Password option.
- Enter your current password into the "Old Password" field.
- Enter your newly created password into the "New Password" field.
- Re-enter the newly created password into the "Confirm New Password" field.
  Please note: your password must comply with all the following:
  1. Be at least eight digits long
  2. Contain at least one upper case letter
  3. Contain at least one lower case letter
  4. Contain at least one number

PERSONAL DETAILS UPDATE

To update any personal information within the online portal, such as the first name, last name or company details, please follow the steps below:

- Click on the Settings icon in top right corner of the page (right next to the logout button).
- Select Manage Profile option.
- Make the necessary changes in the new page.
- Click on Save & Close on the top left.

LEAD TPI USER – ADD USER TO MY CONSULTANCY

To add new users via My Consultancy tab, the new user must be registered online and approved by the SSE Website Support team.

To register online please go to https://ssebusiness.co.uk/signup.

- Select user type as “TPI/Energy Consultant” and fill out the remaining part of the form.
- Once registered, you’ll receive a verification email within a couple of minutes.
- It may appear that the email contains an empty green box; please click in this box as it contains a link, to verify your account.

You’ll receive a message confirming your email address has been verified. However, you will not be able to log in until one of our Website Support Team approves your profile. You’ll receive an automated email when this is completed: generally, within one working day.

Normally we’re able to add the new user into the current consultancy group while we’re approving the user but should this not happen, you’ll be able to complete this action.

- Please go to My Consultancy page.
- Click on Add Profile on the top left corner of the page.
- Enter the email address and click on +Add Profile. When completed the email address will show in the list on the My Consultancy page.
  Please note: If the email address is not registered or was not approved by the SSE Website Support Team, you’ll receive an error message “Email does not belong to a valid profile”.

LEAD TPI USER – REMOVE USER FROM MY CONSULTANCY

To remove a user from your consultancy – which will remove all account access from that user – please follow the steps below:

- Go to My Consultancy page.
- Click on the “X” next to the user you wish to remove.
- A window will pop up to double confirm you wish to complete the action; click Confirm.
- The user profile will disappear from the list on the My Consultancy page.

LOA – UPLOAD

To upload a new letter of authority (LOA) to the online portal please follow the steps below:

- Go to My LOAs page.
- Click on the Submit LOA button on the top left.
- Enter the name of the company that provided the LOA to you in the Customer Name field.
- Enter LOA start date – this can be today's date as it has no effect on the access to accounts.
- Enter LOA end date – this would be the date specified on the LOA itself, which could be the contract end date if this is noted on the document.
  Please note: if your LOA states a period such as "evergreen" or "valid until further notice given", it will only be accepted as valid for 12 months from date of signature.
- Click on the Upload button, and search to where you have saved the LOA document.
- **Please note:**
  - You'll only be able to upload .pdf, .jpeg, .png, .tiff or .eps file types.
  - Please do not submit Word documents as they will not be accepted.
  - If you have a verbal LOA please email this to sse.business@sse.com.
  - If you have a DocuSign LOA and your summary page is a separate document please submit separately as a second LOA and append "summary" into the Company Name field.
- Click on +Request.
- **Please note: managing agents only**: a single LOA entry can be created for you to allow you to add all accounts online against it. The LOA name should be "All Managed Accounts" valid for a year. Your account requests will be validated against information held within our billing system. In case you are not named on the account as "Care Of" we'll request a proof of authority before approving your request. This can be in the form of an actual LOA, a copy of the management agreement or a confirmation email from the customer.

LOA – VIEW REJECTION REASON

When a LOA is approved or rejected by the SSE Website Support Team an automated email is generated to the user who submitted the LOA. The rejection email will contain a reason for the rejection. If the email is unavailable the rejection reason can be viewed online. To do so, please follow the steps below:

- Go to My LOAs page.
- Search for the relevant LOA if needed by starting to enter the customer name in the search box.
- Click on the eye icon next to the relevant LOA.
- In new screen you will see a notes area; this contains the rejection reason.

REQUEST ACCESS TO AN ACCOUNT

To request access to an account online please follow the steps below:

- Go to My Customer Accounts tab.
- Click on the Add New Customer button on the top left of the page.
- Enter either Customer Account Number or Meter Point Number without any spaces; it does not require both numbers.
- Select the relevant LOA from the drop-down menu.
  Please note: if the LOA is not in the drop-down menu, please submit a new one via the My LOA page, then add the account via the My Customer Accounts screen again, as the newly submitted LOA will show in the drop-down menu immediately. **Managing agents only:** if a LOA in the customer name is not available please use the generic LOA entry of “All Managed Accounts”; if this is not in the list please email sse.business@sse.com to add this for you.
- Click on request.

The account will show in My Customer Accounts screen with the status: Awaiting Approval. One of our team will endeavour to review your request and approve the account within five working days.

Customer Account number:
You can find this 10-digit account number on the top right-hand corner of a statement.
Meter Point number:
You can find the Electricity Meter Point Number (MPAN) on the bottom left-hand side of the invoice page of a bill. It’s 13 digits long and next to a large letter "S".
You can also find the Gas Meter Point Number (MPRN) on the invoice page, in the box labelled "Meter Point Reference".

REMOVE ACCOUNT FROM ONLINE PORTAL

To remove an account from the online portal please go to the My Customer Accounts screen.

- Use filters if necessary, to find the relevant account. You can search by either Account number, MPAN/MPRN number or Customer Name.
- When you see the account you wish to remove please click on the dustbin icon under the Options.
- When a pop-up appears, confirm the action and the account will be removed.

Please note: If you remove an account from your online portal, you’ll remove the account for all users from your organisation.
Please do not remove accounts from the view to delete duplicate records. We’re working on resolving a system fault to remove the duplicate records. If you remove one of the duplicate records, you’ll remove all of them, and lose access to that specific account.
You can always re-request access to an account if you remove one by accident by clicking on the “Add New Customer” button on the top left.

STATUS OF ACCOUNT IN MY CUSTOMER ACCOUNTS SCREEN EXPLANATION

There are four different account statuses you may see on the My Customer Accounts page:

1. Approved – this means you have full access to the account and can view bills and run reports.
2. Awaiting approval – it's awaiting the SSE Website Support Team to review. If this status is next to an account for over two weeks, it's highly likely the account was linked to the wrong LOA to start with and a new LOA may be required.
3. Rejected – if a LOA was not submitted within a month of the account access being requested – this would mostly apply to accounts requested prior to the website change.
4. Disabled – the LOA linked to this account expired and a new one is required to restore access to the account. When submitting a LOA to replace an expired one the best practice is to keep exactly the same Customer Name on the LOA.
   Please note: managing agents only: if the LOA named "All Managed Accounts" has expired, please email sse.business@sse.com to review your account and restore access to the affected accounts.

STATUS OF ACCOUNT IN MY LOAS SCREEN EXPLANATION

There are four different account statuses you may see on the My LOAs page:

1. Approved – this means the LOA meets the required criteria and has been approved. This does not mean that accounts added to the LOA will automatically be approved; accounts are reviewed separately to the LOAs by the SSE Website Support Team.
2. Awaiting approval – it's awaiting the SSE Website Support Team to review; our standard SLA is five working days.
3. Rejected – the LOA has been rejected due to a specific reason which can be found in the details page; click on the eye icon next to the LOA and look for the notes.
4. Expired – LOA end date has passed; a new LOA is required if account access is still needed. Please submit a replacement LOA with exactly the same Customer Name on the LOA as the expired one to avoid any delays.
   Please note: managing agents only: if the LOA named "All Managed Accounts" has expired, please email sse.business@sse.com to review your account and restore access to the affected accounts.

GROUP ACCOUNTS – CREATE A GROUP

To create a group of accounts online please follow the below steps:

- Go to My Customer Accounts page.
- Click on Groups in the top left corner.
- In the new window click on Create Group.
- Create a name for your group, for example “Customer 1”.
- Click on Save.
- Once saved, two new buttons will appear: Assign Customer Accounts and Close. Click on Assign Customer Accounts.
- In the new window you’ll be able to search for company names, account numbers or MPANs/MPRNs in order to tick boxes to add accounts to the group.
  Please note: only accounts with Approved status can be added to a group.
- When all appropriate accounts are selected click on Close then Save & Close.

Your group will show in the screen and when you wish to run a report based on the accounts in a group only, you’ll be able to select this group from the drop-down menu in the Groups filter in My Customer Accounts screen.

BILL NOTIFICATION SET UP

To set up a Bill Notification please follow the steps below:

- Go to My Customer Accounts page.
- If needed use filters to find the relevant account. You can search by either Account Number, MPAN/MPRN number or Customer Name if applicable.
- Click on the envelope icon under the options next to the account number you wish to receive notifications for.
- To double check the notification has been enabled, scroll to the right, and you will see a column named Bill Notification. If you see a green tick, this means you’ll receive a notification email when a new bill is ready to view online. If you see a red cross, this means the bill notification is not switched on for this account.

Please note: If you set up bill notification on an account, all current active users will receive the Bill Notification emails. The best way to discard these unwanted emails is to set up a rule in your mailbox to automatically delete these emails.

VIEW BILL ONLINE

To view bills online please follow the below steps:

- Go to My Bills page.
- Do not enter anything into the fields on the page; if anything is already there, click on Clear Filters on the top left.
- Click on Find Bills on the top left of the page.
- The Date range is pre-set to the last 30 days – you can change this using the date picker. Please make sure you select the full date (YYYY/MM/DD) otherwise you may find the date does not change.
- You'll have an option to:
    - Select individual accounts from the list of all accounts. If you have access to many accounts, you can start typing the account number into the Customer Account Number search box and the list of accounts will narrow down. To find another account please clear the search and conduct a new search.
    - Select all accounts by clicking on the Select All button. If you have more than 50 accounts in the list only 50 accounts will be selected.
    - Select accounts from a pre-existing group. The group drop-down menu will only contain entries if you've previously set up a group of accounts via the My Customer Accounts tab.
- Please select at least one account by clicking in the box next to the account number so it will turn blue with white tick inside.
- After you've selected all accounts you wish to view bills for, click on the Find Bills button.
- On the new page a list of bills will show.
  Please note: If no results come up, click on Clear Filters in top left corner, and if there are still no results this means no bills have been produced for the selected account(s) during the selected search period.
- To download a bill, click on the down arrow next to the bill you wish to view.

RUN BILLING REPORT

To run a billing report please follow the steps outlined below:

- Go to My Customer Accounts page.
- Apply necessary filters to narrow down the list of accounts to the ones you wish to run a report on (for example you can choose a specific fuel type, a specific customer name or a specific group if you've created one beforehand).
  Please note: To proceed successfully at least one account must show as Approved in the Status column in My Customer Accounts page.
- Click on Bill Report on top right side.
- In the new window choose your report dates.
- Select a report type, either Bill Summary, Multi Line or Single Line (if you choose Multi Line or Single Line you'll also need to choose the energy type).
- Click on Download Report.

Your report will be delivered to you via email as soon as it is ready.

FILTER/SEARCH FOR DETAILS ONLINE

To help users find the required details faster, filters/search boxes have been introduced to the user pages. Each box will allow you to complete a search from specific data set; for example, one box will let you search for MPAN/MPRN Number and another one will let you search for Customer Name. Each box is accordingly named to ensure the correct value is entered into the correct box.

Some search boxes have a list of values set up as a drop-down menu to choose from, acting like filters. This drop-down menu contains all possible choices; for example, the Status drop-down menu on My Customer Accounts page will only have choice of Approved, Awaiting Approval, Disabled or Rejected.

Please note: if you're searching for a Customer Account Number where the account number starts with 0s, please do not enter the 0s at the front of the number. If you start the number with 0 the search will come back with 0 results.

CREATE AND DELETE CUSTOMISED TABS

Within the SSE Business Energy portal, you can customise your views. The best way to do so is by creating various tabs within individual screens where you can apply different filters that will help you with your daily work. For example, you can create a tab in the My LOAs screen which will only contain LOAs that are expired or awaiting approval. Or you could set up a tab in the My Customer Accounts screen where you'll see only an account for a specific customer, accounts which are awaiting approval or accounts that belong to a group you've created.

To create a tab from within either My Customer Accounts, My LOAs or My Tenders page, follow the below steps:

- Go to the screen where you wish to create a new Tab (My Customer Accounts, My LOAs or My Tenders).
- Click on the + sign right next to the Search in the top left corner.
- In the pop-up create a name for your new tab, for example “Awaiting Approval” or “Customer 1”.
- Click on Create.
- You'll see the new tab name right next to Search on the top left and you will be able to click between the two tabs.
- Within the newly created Tab, apply the necessary filters – for example, if your Tab is created to view items which are awaiting approval, click on Status and select Awaiting Approval from the drop-down menu, or if you want to filter for a specific customer name, please start typing the customer name into the Customer Name filter. The filters are saved automatically; if you move to another page and come back to your tab these changes will be available until you change them again manually.

If you no longer require a tab that you previously created, you can delete it. To do so:

- Click into the tab you wish to delete.
- Click on the Setting button in the top right corner.
- Select Delete Tab from the drop-down menu.
- In the Confirm Deletion pop-up, click on Delete.
- Once a tab is deleted it cannot be restored but you can easily create a new one.