

# We are changing our systems

Which means improvements  
and a new look to future invoices.



# What does this mean for you?

Over the next few months, we will move you and your customers to a new and improved customer management system called **Evolve**.

Evolve is designed around customer needs and will mean a simpler, more flexible service with enhancements to what we can offer. It will also mean easier-to-read invoices and more detailed reporting to help customers understand their usage better and take steps on their journey to Net Zero.

The move should be straightforward, and there shouldn't be any disruption to you or your customers. Important account information will be available internally for us to view from the legacy system.

To help you prepare your business to integrate with Evolve on the following pages we will cover:

- Changes to pricing
- How to read your future invoices
- Other changes and benefits
- Relationship management
- Next steps





# Changes in pricing

As well as the benefits noted above, **Evolve** will mean changes to the pricing format you and your customers receive on offers, contracts, invoices and reports.

The main differences you should be aware of are:

- The Standing Charge will change to pence per day (p/day)
- Available capacity will change to p/kVA/day
- All prices will move to 6 decimal places
- The Feed In Tariff (FiTs) will be included in the unit rate, and as a result, the unit rate will be uplifted



# How to read future invoices

The move to **Evolve** will mean a new look to our invoices.

We have redesigned them to make them simpler and easier to understand by providing you with a more straightforward summary of charges and transactions. Below we show the visual difference between an old and a new invoice.

Account for quarter 4 2022/23

Statement of account

Invoice no.	Site name	Energy	CCL	VAT	Amount
8700000000	1018P	30.17	144.11	879.47	
Total for enclosed invoice		30.17	144.11	879.47	
Total new charges including VAT				879.47	
Balance from previous bill				267.28	
Payments received					
Total to be collected by direct debit on or after 28 February 2023					879.47

Payment in full by direct debit

This bill is for information only. The direct debit transfer of the total amount shown will take place on or soon after 28 February 2023.

Turn over for more information about what to do if you have any questions about this statement or your meter readings.

Old invoice



Electricity Supply Invoice

Invoice period 01/10/2022 to 31/03/2023

Site reference	Units kWh	Energy inc SC	CCL	VAT at 20%	VAT at 5%	Total
AG00000000	18196.9	£34429.14	£1466.28	£7179.09	£0.00	£43074.51

Invoice Summary

Energy inc standing charges (SC) Total	£34429.14
CCL	£1466.28
Total VAT	£7179.09
Total inc invoice	£43074.51
Balance brought forward from previous invoice	£35571.52
Payment due	£38646.03

Failure to make payment in full by the due date will result in a late payment charge. If you're struggling to pay, please contact us.

New invoice

## New invoice: Summary of key changes

### 1. Invoice Structure Identifier

The 'Customer Account Number' on your old invoice has been replaced with an 'Invoice Structure Identifier' on your new invoice. This is a ten-digit numerical number that will always begin with '87' e.g. 8700000000 and ensures that the balance can be identified at account level.

### 2. CCL Registration Number

This is a new addition to your invoices. CCL stands for 'Climate Change Levy'. The Climate Change Levy is a Government tax which is designed to encourage business customers to use energy more efficiently and support the reduction of the UK's overall emissions.

### 3. Electricity/Gas Supply Invoice

Your invoices were previously titled 'Statement of Account'. We have changed this, so they are now titled 'Supply Invoice'.

### 4. Site Reference

If you are a multi-site business your Site Reference is used to identify individual properties. In the updated invoice you may notice we've added a prefix of 'AGR' which stands for 'Agreement'.

### 5. VAT

Depending on how much energy you use, you will either pay standard VAT or reduced VAT. Your invoice now clearly displays this. For more on VAT thresholds please see the HMRC website; [www.gov.uk/how-vat-works/vat-thresholds](http://www.gov.uk/how-vat-works/vat-thresholds).

### 6. How to Pay

We've changed our banking information. Please take time to familiarise yourself with our new bank details which will appear in the how to pay area of your invoice. You can find more details on this in the 'Payment Information' section on page 5.

### Direct Debit Discount

Where you or your customer pay by Direct Debit, you will see a separate line item on the contract and invoice which will show the Direct Debit discount you receive. This will only be applied to contracts agreed in our new system (not on existing contracts).





# Other changes and benefits

On the following pages, we look at specific areas in more detail, explaining what is changing, and what it means for you and your customers.

We will continue to support you and help you understand the benefits and positive changes that Evolve offers as we migrate your portfolio.

## Payment Information

### If you pay by Direct Debit

Once you have been migrated to the new system, your Direct Debit(s) will be collected by SSE Energy Supply Ltd. This means that our new name and new reference may appear on your bank statement against each Direct Debit collection from us.

The good news is, you don't need to take any action to continue receiving the benefits of Direct Debit collections. You don't need to cancel your current Direct Debit and there is no need for you to complete a new Direct Debit instruction as details of the change have been communicated directly to your bank, who may also notify you independently.

### If you pay by direct bank transfer

The change to the new system also means there will be new customer references and new bank details under the SSE Energy Supply Ltd name for making invoice payments by bank transfer. When you and your customer receive your first new-look invoice from the new system, you and your customer will need to take action to update our new bank details in your records. The new bank details are below, which you and your customer can verify when you receive your first invoice from the new system.

<b>Bank:</b>	NatWest Bank	<b>Account Name:</b>	SSE Energy Supply Ltd
<b>Sort code:</b>	60-17-21	<b>Account No:</b>	99370069

If you or your customer need to send a remittance advice to support your payment, please send it to [RemittanceAdvice@sse.com](mailto:RemittanceAdvice@sse.com) clearly quoting the relevant payment reference as explained on your invoice.

If you or your customer pay by direct bank transfer and would like to pay by Direct Debit, you can request this by completing the [Direct Debit Mandate](#) and return it to us by email at [DDMandate@sse.com](mailto:DDMandate@sse.com).

## Letters of Authority (LOA)

The process of submitting LOAs will improve in Evolve, as unlike the current process, the LOA will only need to be logged and uploaded once as an association will be made between the TPI and Customer.

## Invoicing

In some circumstances, we may need to bring forward your invoicing cycle temporarily to ensure you are invoiced correctly. If this applies to you, your Billing Account Manager will be in contact to discuss what this means for you.

Your new invoicing account will be set-up in Evolve according to the services we are invoicing you for.

For example, where your half-hourly and non-half hourly services are currently invoiced using the same invoice account, they will instead be invoiced through separate invoicing accounts. We'll take care of this for you so you don't need to take any action.



## Electronic Invoicing

### WHAT IS CHANGING?

**Electronic invoicing will move from EDI to XML invoicing formats**

### WHAT DOES IT MEAN?

- XML is more widely used, it offers more flexibility and is available in various formats. Once you have received your XML file you can customise this to show you what you need.
- XML provides better reporting functionality.
- No coding will be required to read and understand invoicing formats. In addition, any application that can process XML can use the information e.g. Java.
- We will still offer three levels of detail in our invoicing summaries, alongside the new XML files.
- If you wish to have iEDIC invoicing, you must also be sent the XML files as they are VAT compliant, you cannot just have iEDIC.
- If you require a PDF, you can register on our website, where you and your customer can download PDF copies from the portal as and when required.
- We are here to support you with the move to XML invoicing and have created a separate document providing more details and highlighting how XML invoicing can benefit you. You can access this document [here](#).
- We have created a step by step guide on how to create an XML template and import the data into a Microsoft Excel workbook. You can access the guide [here](#).

The table below features some of the most important Excel workbook headings with supporting descriptions. Those that are in bold will be new or different to you and it's worth taking the time to familiarise yourself with them.

NEW IEDIC HEADING	DESCRIPTION
Invoice structure ID	<b>Groups together Delivery Agreements under the same Invoice Cycle and/or same Utility and tariff structure</b>
Delivery agreement ID	<b>The Agreement number which can be seen via the Contracts page. This goes out on the invoices as a Site Reference number</b>
Customer account	<b>Unique number relating to the contracted customer</b>
Customer own reference	<b>Customers own reference (if applicable)</b>
Customer name	Contracted party
Service PO + building	Building name relating to the site/delivery address
Service Nr + street	Street Number relating to the site/delivery address
Service post town	Town/City name relating to the site/delivery address
Service county	County relating to the site/delivery address
Service post code	Postcode relating to the site/delivery address
Tariff structure	<b>Tariff name relating to the tariff</b>
Top line	<b>Contains details of the Customers Profile including the Meter Time-switch Code and the Line Loss Factor</b>
Metering point number	Unique Distribution number for a delivery address (MPxN)

<b>NEW IEDIC HEADING</b>	<b>DESCRIPTION</b>
Meter serial number	Unique number assigned to each meter at the delivery address
Tax point date	Date invoice is posted to the ledger
Invoice number	Unique number relating to the specific invoice
Start date	Start date of an invoice period
End date	End date of an invoice period
Note type	Description of the type of note received (e.g., Invoice / Credit Note)
WDLAF*	Weighted Average Loss Adjustment Factor
WTLAF*	Weighted Transmission Loss Adjustment Factor
Primary metering point number**	SMART meter Primary Total register
Total primary register**	SMART meter primary register total
Unrestricted units	Units used or consumed during unrestricted period according to your tariff
Unrestricted unit rate	Cost of each unrestricted unit according to your tariff
Day units	Units recorded during day period according to your tariff
Day unit rate	Cost of each day unit according to your tariff
Night units	Units recorded during night period according to your tariff
Night unit rate	Cost of each night unit according to your tariff
Weekday units	Units recorded during weekday period according to your tariff
Weekday unit rate	Cost of each weekday unit according to your tariff
Evening-weekend-night units	Units recorded during Evening-Weekend-Night period according to your tariff
Evening-weekend-night unit rate	Cost of each Evening-Weekend-Night unit according to your tariff
Evening-weekend units	Units recorded during Evening-Weekend according to your tariff
Evening-weekend unit rate	Cost of each Evening-Weekend unit according to your tariff
Weekend day units	Units recorded during Weekend period according to your tariff
Weekend day unit rate	Cost of each Weekend unit according to your tariff
Calorific value	Measures the quality of gas supplied to your property. This figure is set by the Local Distribution Zone and will appear on each invoice ranging between 37 and 43.0
Current read type	Whether the reading is actual or estimated
Maximum demand	Highest recorded usage in any 1 billing period (usually a month)
Available capacity	Maximum amount of power your site has been allocated by your Distribution Company
Available capacity rate	Rate according to your tariff
Available capacity charge	Calculation of the Available Capacity volume multiplied by the Available Capacity rate



NEW IEDIC HEADING	DESCRIPTION
Standing charge payable	Daily charge applicable for each site
VAT rate	VAT rate applied according to current HMRC and usage guidelines
Charge ex VAT	Total charges applied minus calculated VAT
Total VAT	Total VAT applied to your invoice
Invoice total	Total of all credits/charges
Invoice amount payable	Total value outstanding after all credits and debits have been taken into consideration

\* This will only appear on energy only invoices.

\*\* This is only applicable if you have a SMART meter.

## Commissions

WHAT IS CHANGING?	WHAT DOES IT MEAN?
We will be introducing new claim templates?	<ul style="list-style-type: none"> <li>We are currently working on a new claim template file and a claim output file, which we will share with you soon. In the meantime, submit your claim files as normal and our Commissions Team will do the rest.</li> </ul>
The way you submit your invoices	<ul style="list-style-type: none"> <li>For a short period we may need 4 invoices to be submitted, one for electricity and/or Gas per system. This will go back to two invoices once all of your sites have been migrated.</li> </ul>
Our service level agreement	<ul style="list-style-type: none"> <li>While we are dual running the turnaround times may increase to 10 working days, once we have fully migrated we should return to our normal 5 working day turnaround.</li> </ul>
Your ESCAPs consultant ID	<ul style="list-style-type: none"> <li>Evolve will provide you with a new consultant ID.</li> </ul>

## Commissions FAQs

QUESTION	ANSWER
What does 'future payments only made from Evolve' mean?	When you see this message against specific MPR/MPANs, it means that they have been migrated to Evolve. If you don't see this message against sites, it means they are still in our legacy system.
Will commission on the Standing Charge change?	<p>In Evolve all Standing Charge commissions will be recorded as pence per day, not pounds per annum. To convert rates from pounds per annum to pence per day, you need to:</p> <p><b>*100 (to convert to pence per day) / by 365 (number of days in a year</b>  <b>E.g., £365 p/a * 100 / 365 = 100 pence per day</b></p>
If I forget to claim for a historic contract can it be claimed in Evolve?	If the contract has ended and the final bill has been produced it will not be migrated. Any outstanding commission can be claimed via the legacy system.
No Job ID is quoted on the Output Claim File, which is needed to process the invoice on Tradex. How should I proceed?	The PO number and fuel type can be used to replace the Job ID.

## Commissions FAQs continued

### QUESTION

### ANSWER

I have already received one set of claim results this month. Why have I received a second set?

While you have sites in both our legacy system and Evolve, we must run your commission claims in both systems. As a result, you will receive two Commission Claim Output Files until all your sites have been migrated.

Do I have to submit two sets of invoices or do I have any other options?

You will need to submit invoices for each set of results you receive. However, if you do not wish to invoice/credit for your second set of results, we can withdraw it for you. To do this, please email [ssecommission.cardiff@sse.com](mailto:ssecommission.cardiff@sse.com). The sites will be withdrawn and then processed again on your next claim.

How can I tell if my contract has been migrated with an unclaimed commission?

If the contract has been migrated with unclaimed commission, the first claim will show a payment description as 'migration unpaid claims'.

Is the new Claim Output File still in its early stages of development as it appears to be incomplete/incorrect?

Yes, the Commission Claim Output File is in development, because of this you will notice that:

**PPU:** On the first claim this will show as 1, the amount to pay has been calculated based on the pence per unit quoted on the contract.

**Consumption:** If the value is against a migrated line this is the unpaid value in pounds. If the value is against the unit rate line this is the consumption used for the billed period.

Why is my commission rate showing as 0.005ppu when it should be 0.5ppu?

The Commission Claim Output File shows commission in pounds, e.g., 0.005 £/kWh, however, the commission rate agreed upon with your Key Account Manager would have been pence per unit. To convert pounds per unit to pence per unit, you need to multiply it by 100.

E.g.,  $0.005 * 100 = 0.5$

Will the commission process change?

The process will not change, but file formats will. We will be on hand to support you through this change.

How can I tell from the new Claim Output File what the payment type is?

E.g., is the payment a forward balance, interim or final payment?

If the contract has been migrated with unclaimed commission, the first claim will show a payment description as 'migration unpaid claims'. Further claims will then state what type of payment the value relates to. You can see a table of the types of payments and a description below.

Payment Type	Description
Forward	Positive value to pay out to you
Reverse	Negative value to clawback from you
Migration PPU Bill Balance	This is the outstanding commission from our legacy system
Upfront Migration	This is the outstanding commission from our legacy system
Migration Unpaid Claims	This is the outstanding commission from our legacy system

## Query Management & Reporting

### WHAT IS CHANGING?

### WHAT DOES IT MEAN?

**The way we manage customer requests**

- Evolve is intuitive, which means that it will prompt users for next actions and follow-ups. We will now be able to provide you with regular query updates including expected resolution dates and insight into query types.

**We have a new document storage solution integrated with Evolve**

- In Evolve we can quickly and easily upload signed contracts, LOAs, URLs and pictures of meters as well as other related documents/images. These items can also be easily located and exported. This means you will no longer need to send an LOA in multiple times to different teams.
- When a LOA is saved in Evolve an association is created between the TPI and customer. This association carries itself through other parts of Evolve for consistency.

**Reporting capabilities**

- Running reports in Evolve will be easier and quicker, which should reduce your waiting times.
- Evolve will provide tracking and reporting on KPIs.
- Evolve will give us the ability to provide our customers with various standardised reports.

**One system, one customer view**

- Evolve allows our teams to have a single view of our customers which will allow us to provide you with a better service.

**Clearer ownership for queries**

- Which means we should be able to resolve your queries faster and more accurately.

**Case/query management**

- The new cases/query management feature in Evolve is for internal use only. It allows us to track your query through the system and we can pass it to the relevant person or team for actioning.



## Quoting

### WHAT IS CHANGING?

The new system will mean a change to the information we ask for in your initial quote request

### WHAT DOES IT MEAN?

Evolve provides us with a more automated and streamlined process for assessing and credit checking our customers. This means that we should be able to get quotes to you more quickly.

In order for us to provide your quotes more quickly, we now require certain mandatory information which we have detailed below.

If you are a limited company:

- Company Reg Number as held on [Companies House](#)
- Registered Name and address as held against the Company Registration Number

If you are a Sole Trader/Partnership:

- Proprietor Information e.g. Name, Address
- Date of Birth (if consented)
- Date of Ownership\*
- Date of Incorporation\*

If you are a Charity:

- Charity Registration Number as registered on Charity Commission's website
- [Scottish Charity Regulator](#)
- [Charity Commission's website](#)

**Note:** We have future plans to fully integrate with the Charity Commission's website which means we'll be able to attain England and Wales Charity information automatically.

Our quoting process is more robust

- Unsupported tariffs will be blocked at the quotation stage.
- When quoting related MPANs, the lead MPAN will pull through all related MPANs from Ecoes. There will be further validation during the registration process to ensure we still have all related MPANs.

Your contracts may look different

- You will see Rolling Annual Quantity (AQ) on the contract document only.

Commission on Standing Charge

- Commission on the Standing Charge will be recorded as pence per day instead of pounds per annum.

\*For example, Bob's Butchers will have been running for 40 years so the Date of Incorporation would be 1983 but J. Bloggs became the new owner and retained the business name 2 years ago, therefore his Date of Ownership would be 2021.

## Manage My Account (MMA) Portal

### WHAT IS CHANGING?

We are upgrading our MMA portal

### WHAT DOES IT MEAN?

Once you have been migrated to Evolve you'll have the benefits of our new MMA portal where you can view lots of useful information like:

- Current account balance
- Meter details including the type of meter at site
- Whether a meter reading is due

Our new MMA portal also improves our sign-up and payment journeys.

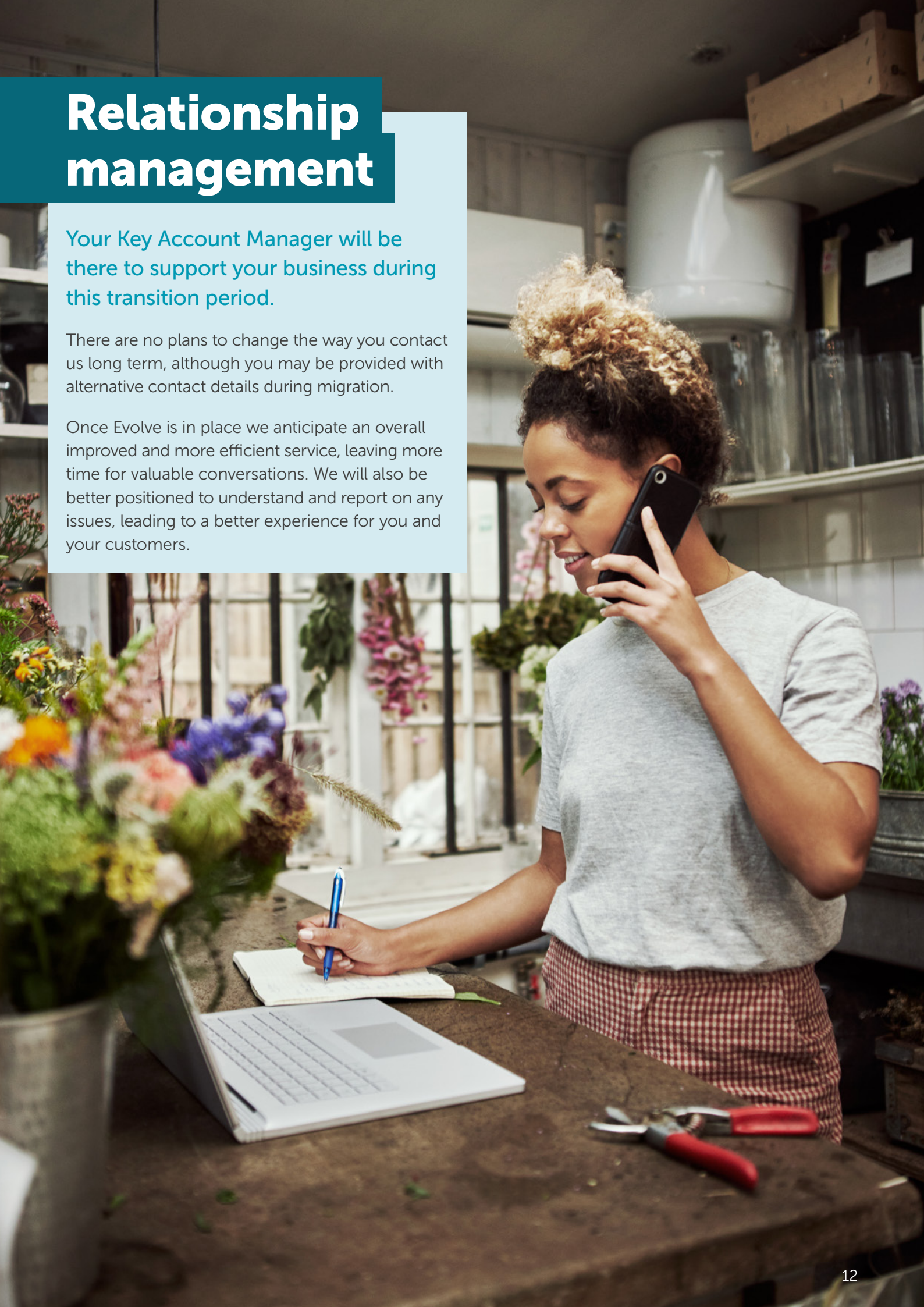
If you require any assistance regarding MMA there is a banner located on the home page with telephone number and a 'contact us' form which will go straight to the Evolve Enquiries Team.

# Relationship management

Your Key Account Manager will be there to support your business during this transition period.

There are no plans to change the way you contact us long term, although you may be provided with alternative contact details during migration.

Once Evolve is in place we anticipate an overall improved and more efficient service, leaving more time for valuable conversations. We will also be better positioned to understand and report on any issues, leading to a better experience for you and your customers.



# Next steps

We expect all customers to be migrated to **Evolve** over the coming months.

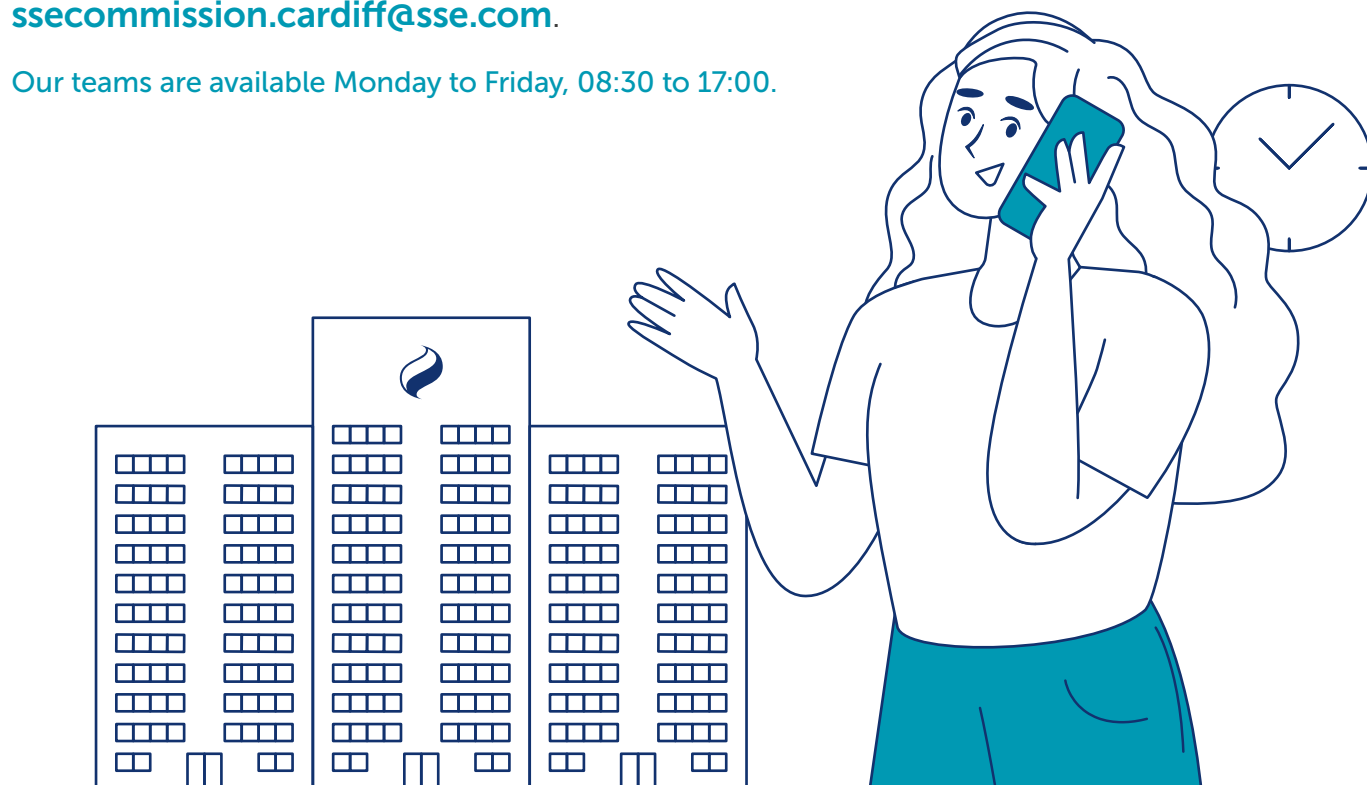
We will keep you updated with the migration roll-out and share any further changes or templates you should be aware of.

In the meantime, we'd ask that you take the appropriate action to get ready for migration to Evolve. For example, making your teams aware of the forthcoming changes.



If you have any questions, or want to provide us with your feedback, please contact your Account Management Team. For commission related queries please email the Commission Team on [ssecommission.cardiff@sse.com](mailto:ssecommission.cardiff@sse.com).

Our teams are available Monday to Friday, 08:30 to 17:00.



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