

MyBusiness

User guide for energy brokers

Please note – for best results when using this guide and to unlock its full functionality please download and open using Adobe Reader.

Top tip...

If you're a Chrome user, simply click the download button.



Take control and discover easy ways to manage your customers energy accounts online.

MyBusiness makes it easy to manage your customers energy accounts online, at any time, all under one login:

- ✓ analyse and understand your customers energy spend and consumption
- ✓ create bespoke reports
- ✓ raise, track and manage all of your queries in one place, with real time updates




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Logging in and getting around


The first step is to open a new web browser and go to **<https://mybusinessaccount.edfenergy.com>**

- 1 If you're a [returning user](#), enter your email and password.
- 2 If you haven't logged in before, click [register here](#) and follow the on screen instructions. You'll then receive a welcome email with a link to set your password.



Login

Please enter your email and password to log in.

1


 customer email

2



[I've forgotten my password](#)

☐ Remember My Details

[Submit](#) 

2 Not Registered? - [Register here](#)

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Logging in and getting around

- › Getting started
- › Main navigation
- › Action tabs
- › Customise your dashboard
- › View paperless and copy bills
- › View your customers consumption data
- › Reports
- › Queries

Problems logging in?
Call us on 0845 301 3515

Getting started

Once you've logged in, you'll see your MyBusiness homepage, which gives you quick access to all the key tools you need to manage your customers electricity accounts via:

3 The [Main Navigation](#) side bar

4 On relevant pages you will also find quick access page [Tabs](#)

5 You can also access key data through your MyBusiness [Widgets](#)

Invoice No.	Account No.	Due Date	Value
0000000000		12 Nov 2018	£0.00
0000000000		12 Nov 2018	£0.00
0000000000		12 Nov 2018	£0.00
0000000000		12 Nov 2018	£0.00
0000000000		12 Nov 2018	£0.00



Rollover [blue text](#) or
1 numbers on the
screen illustration to
reveal details.

☑ Logging in and getting around

› Getting started

- › Main navigation
- › Action tabs
- › Customise your dashboard

- › View paperless and copy bills

- › View your customers consumption data

- › Reports

- › Queries

Main navigation

- 6 [Search](#)
- 7 [Dashboard](#)
- 8 [Inbox](#)
- 9 [Query Dashboard](#)
- 10 [Companies & Sites](#)
- 11 [Data Analysis](#)
- 12 [Reports and Data Push](#)
- 13 [How To](#)

The screenshot shows the MyBusiness EDF Energy portal. The left sidebar contains a navigation menu with items 6 through 13. The main content area displays the 'Sample Plc (3rd Party)' dashboard. It includes a table of 'Latest Invoices' with columns for Invoice No., Account No., Due Date, and Value. The table shows five invoices, all with a value of £0.00 and a due date of 12 Nov 2018. There is also a section for 'Open Queries' and a 'Closed Queries In Last Week' section.

Invoice No.	Account No.	Due Date	Value
0000000000		12 Nov 2018	£0.00
0000000000		12 Nov 2018	£0.00
0000000000		12 Nov 2018	£0.00
0000000000		12 Nov 2018	£0.00
0000000000		12 Nov 2018	£0.00



Rollover **blue text** or **1** numbers on the screen illustration to reveal details.

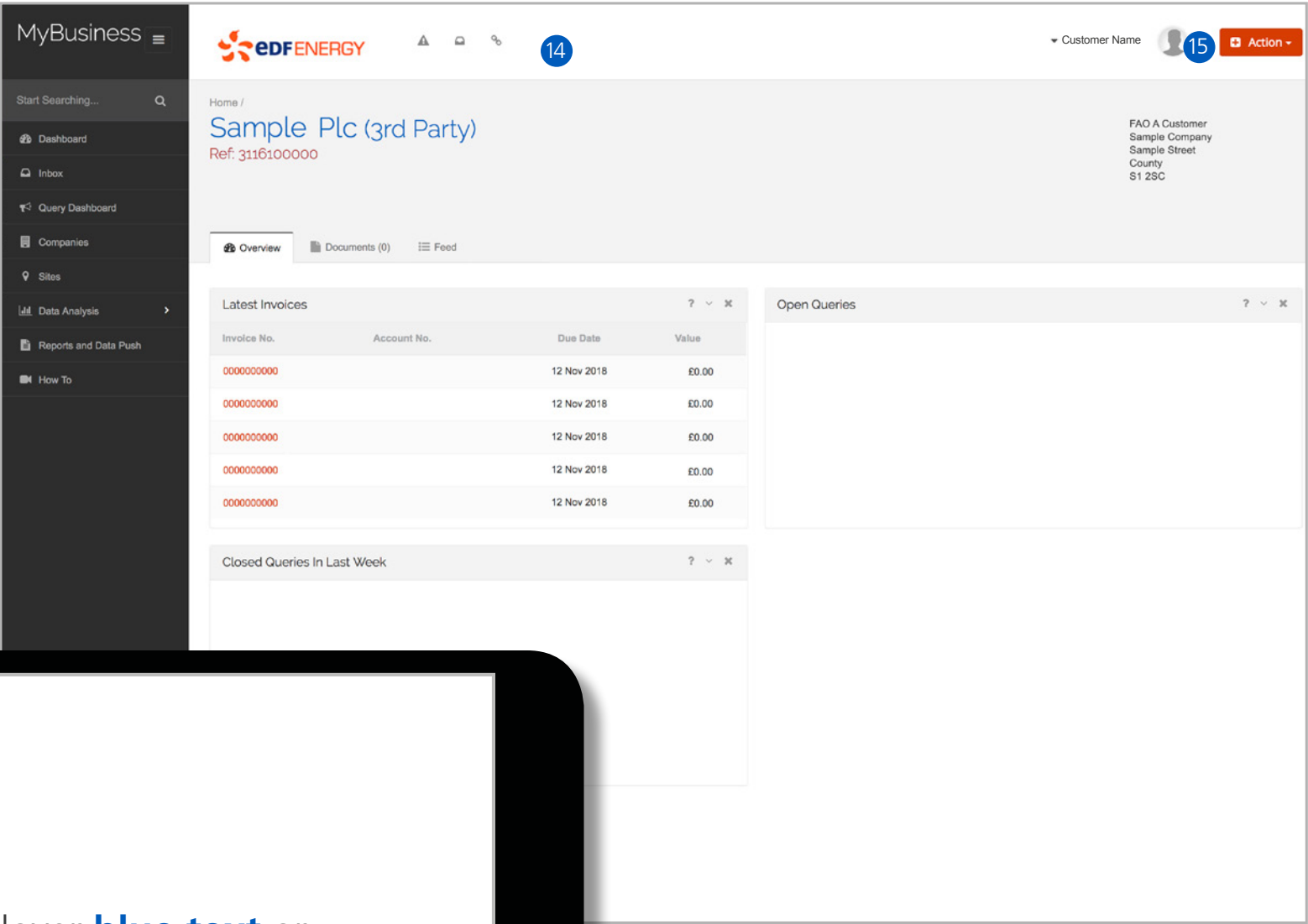
Logging in and getting around

- › Getting started
- › **Main navigation**
- › Action tabs
- › Customise your dashboard
- › View paperless and copy bills
- › View your customers consumption data
- › Reports
- › Queries

Main navigation

14 [Shortcut icons](#)

15 [Actions](#)



Rollover [blue text](#) or 1 numbers on the screen illustration to reveal details.

Logging in and getting around

- › Getting started
- › **Main navigation**
- › Action tabs
- › Customise your dashboard
- › View paperless and copy bills
- › View your customers consumption data
- › Reports
- › Queries

Action tabs

[16 Overview](#)

[17 Documents](#)

[18 Feed](#)

MyBusiness

EDF ENERGY

Customer Name

Action

Start Searching...

Home / Sample Plc (3rd Party)
Ref: 3116100000

FAO A Customer
Sample Company
Sample Street
County
S1 2SC

16 17 18

Overview Documents (0) Feed

Invoice No.	Account No.	Due Date	Value
0000000000		12 Nov 2018	£0.00
0000000000		12 Nov 2018	£0.00
0000000000		12 Nov 2018	£0.00
0000000000		12 Nov 2018	£0.00
0000000000		12 Nov 2018	£0.00

Open Queries

Closed Queries In Last Week



Rollover **blue text** or **1** numbers on the screen illustration to reveal details.

☑ Logging in and getting around

- › Getting started
- › Main navigation
- › **Action tabs**
- › Customise your dashboard
- › View paperless and copy bills
- › View your customers consumption data
- › Reports
- › Queries

Customise your dashboard

To help you get to the information that's relevant to you quickly, we've made it easy to design your own MyBusiness overview dashboard.

19 To customise your dashboard simply click the [Action](#) menu and select Dashboard Manager.

The screenshot shows the MyBusiness dashboard interface. On the left is a dark sidebar with navigation links: Dashboard, Inbox, Query Dashboard, Companies, Sites, Data Analysis, Reports and Data Push, and How To. The main content area has a header with the EDF Energy logo, contact information, and a user profile with an 'Action' button. A dropdown menu from the 'Action' button is highlighted with a blue circle containing the number 19, showing options: Change your password, Raise a Query, Watch the introduction video, Dashboard Manager, and Submit Multiple Meter Readings. Below the header, there are several widgets: a Map of Europe, a 'Customer Cost (Power)' bar chart showing amounts from Feb 18 to Jul 18, a 'Latest Invoices' table, and an 'Open Queries' bar chart showing the number of queries for different categories.

Invoice No.	Account No.	Due Date	Value
Aug 2018			£0.00
Aug 2018			£0.00
Aug 2018			£0.00
Aug 2018			£0.00
Aug 2018			£0.00

Category	No. of Queries
03 Meterin...	3
02 Invoice...	2
05 Change ...	2
08 Request...	1



Rollover [blue text](#) or **1** numbers on the screen illustration to reveal details.

Logging in and getting around

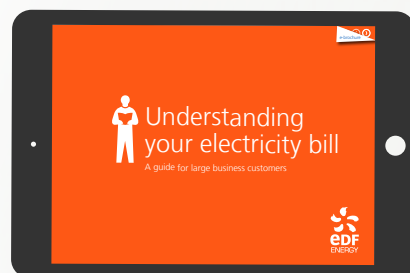
- › Getting started
- › Main navigation
- › Action tabs
- › **Customise your dashboard**
- › View paperless and copy bills
- › View your customers consumption data
- › Reports
- › Queries

View paperless and copy bills...

... so you won't need to request and wait for copy bills to arrive. What's more, our paperless bills are VAT compliant* too.

Want to know more about your customers bill?

[Click here](#) to download our handy guide.



*If you choose to have online bills as your primary billing channel.

› Logging in and getting around

🕒 View paperless and copy bills

› Viewing single site bills & credit notes

› Viewing consolidated bills

› View your customers consumption data

› Reports

› Queries

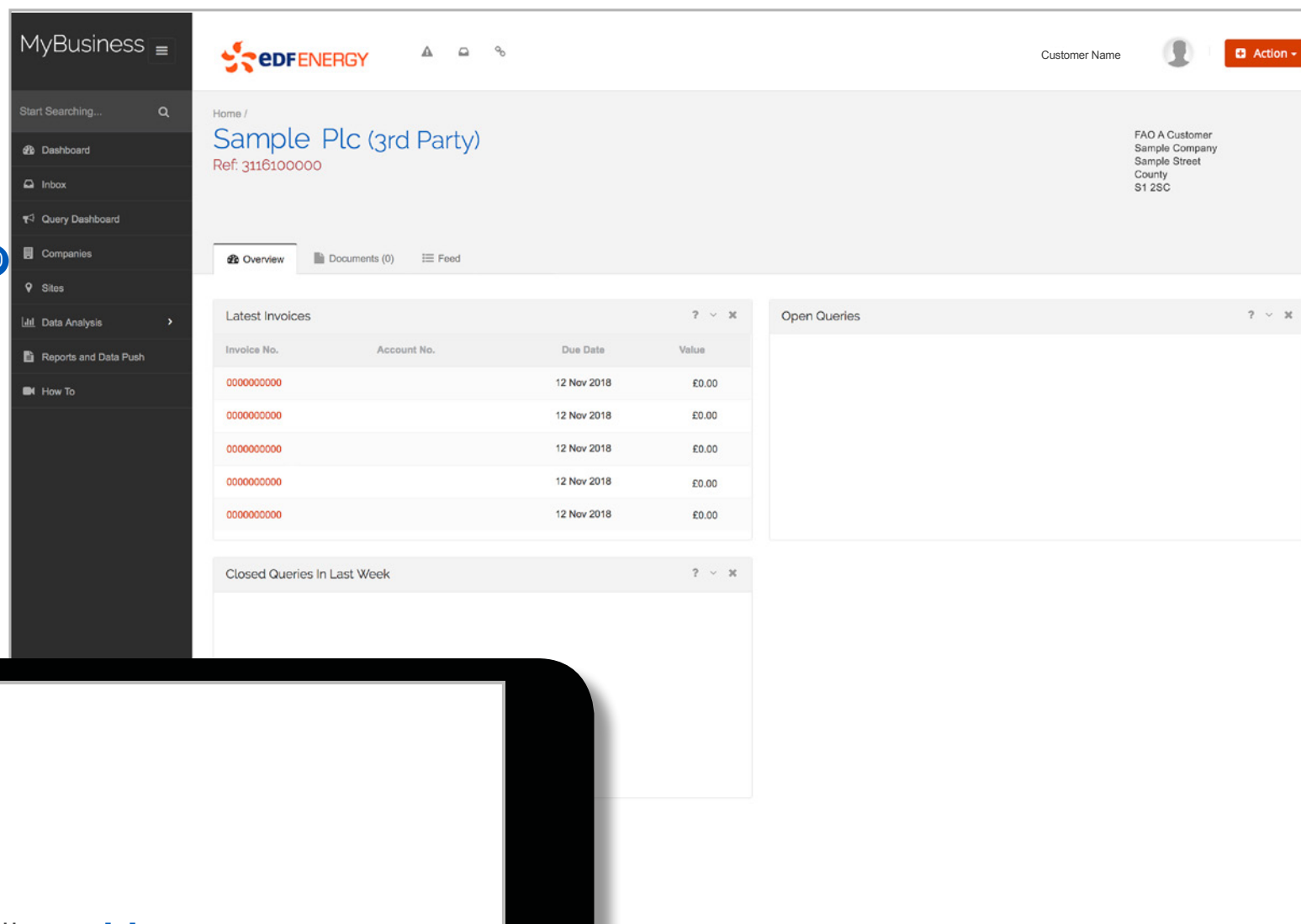
Viewing single site bills

20 To see a single site bill or credit note, first select the customer from the [Companies](#) button on main navigation.

21 Select the [Accounts tab](#) for that customer. You will then be presented with a list of the accounts you have access to.

22 Click on the [account number](#) you wish to view an invoice or credit note for and you will open the account page.

20



The screenshot shows the MyBusiness EDF Energy portal. The left sidebar contains navigation links: Dashboard, Inbox, Query Dashboard, Companies (highlighted), Sites, Data Analysis, Reports and Data Push, and How To. The main content area shows the customer details for 'Sample Plc (3rd Party)' with reference number 'Ref: 3116100000'. The 'Overview' tab is selected, displaying a table of 'Latest Invoices' and a section for 'Open Queries'.

Invoice No.	Account No.	Due Date	Value
0000000000		12 Nov 2018	£0.00
0000000000		12 Nov 2018	£0.00
0000000000		12 Nov 2018	£0.00
0000000000		12 Nov 2018	£0.00
0000000000		12 Nov 2018	£0.00

Customer Name: Sample Plc (3rd Party)
Ref: 3116100000

FAO A Customer
Sample Company
Sample Street
County
S1 2SC

Overview Documents (0) Feed

Latest Invoices

Open Queries

Closed Queries in Last Week



Rollover [blue text](#) or **1** numbers on the screen illustration to reveal details.

› Logging in and getting around

☑ **View paperless and copy bills**

› **Viewing single site bills & credit notes**

› Viewing consolidated bills

› View your customers consumption data

› Reports

› Queries

Viewing consolidated bills

- 23 In order to see a customers consolidated bill or credit note, first select the Accounts tab.
- 24 Click on a parent account, and you will open the account page.
- 25 Select the Invoices tab and then click on the invoice number you wish to view an consolidated bill for.

MyBusiness

Start Searching...

Dashboard

Inbox

Query Dashboard

Companies

Sites

Data Analysis

Reports and Data Push

How To

edfENERGY

Contact Us

Customer Name

Action

Home / Sample Plc (Client)
Ref: 1000000000
Total Balance: £0

OverviewAccounts (86)23Sites (5)Contracts (1)Documents (0)Feed

AllSearch Query

Account Number	Parent Account	Account Type	User Reference	Payment Method	Payment Terms (Days)	Current Balance
0000000000	5100000000	Electricity only		DD	60 days from invoice date	£0.00
0000000000		Electricity only		DD	14 days from invoice date	£0.00
000000000024		Electricity only		DD	60 days from invoice date	£0.00
0000000000	4100000000	Electricity only		DD	60 days from invoice date	£0.00
0000000000		Electricity only		CHEQUE	14 days from invoice date	£0.00
0000000000	5100000000	Electricity only		DD	14 days from invoice date	£0.00
Electricity only				DD	60 days from invoice date	£0.00
ty only				DD	60 days from invoice date	£0.00
ty only				DD	60 days from invoice date	£0.00
ty only				CHEQUE	14 days from invoice date	£0.00
ty only				CHEQUE	14 days from invoice date	£0.00
ty only				CHEQUE	14 days from invoice date	£0.00
ty only				DD	60 days from invoice date	£0.00
ty only				DD	60 days from invoice date	£0.00



Rollover blue text or 1 numbers on the screen illustration to reveal details.

- › Logging in and getting around
- View paperless and copy bills
- › Viewing single site bills
- › Viewing consolidated bills
- › View your customers consumption data
- › Reports
- › Queries

View your customers consumption data

Viewing your customers consumption data in an on-screen graph can help you analyse your portfolio. The consumption graphs also allow you to make historical comparisons between sites, or year-on-year comparisons for a single meter.

› Logging in and getting around

› View paperless and copy bills

④ View your customers consumption data

› Data analysis

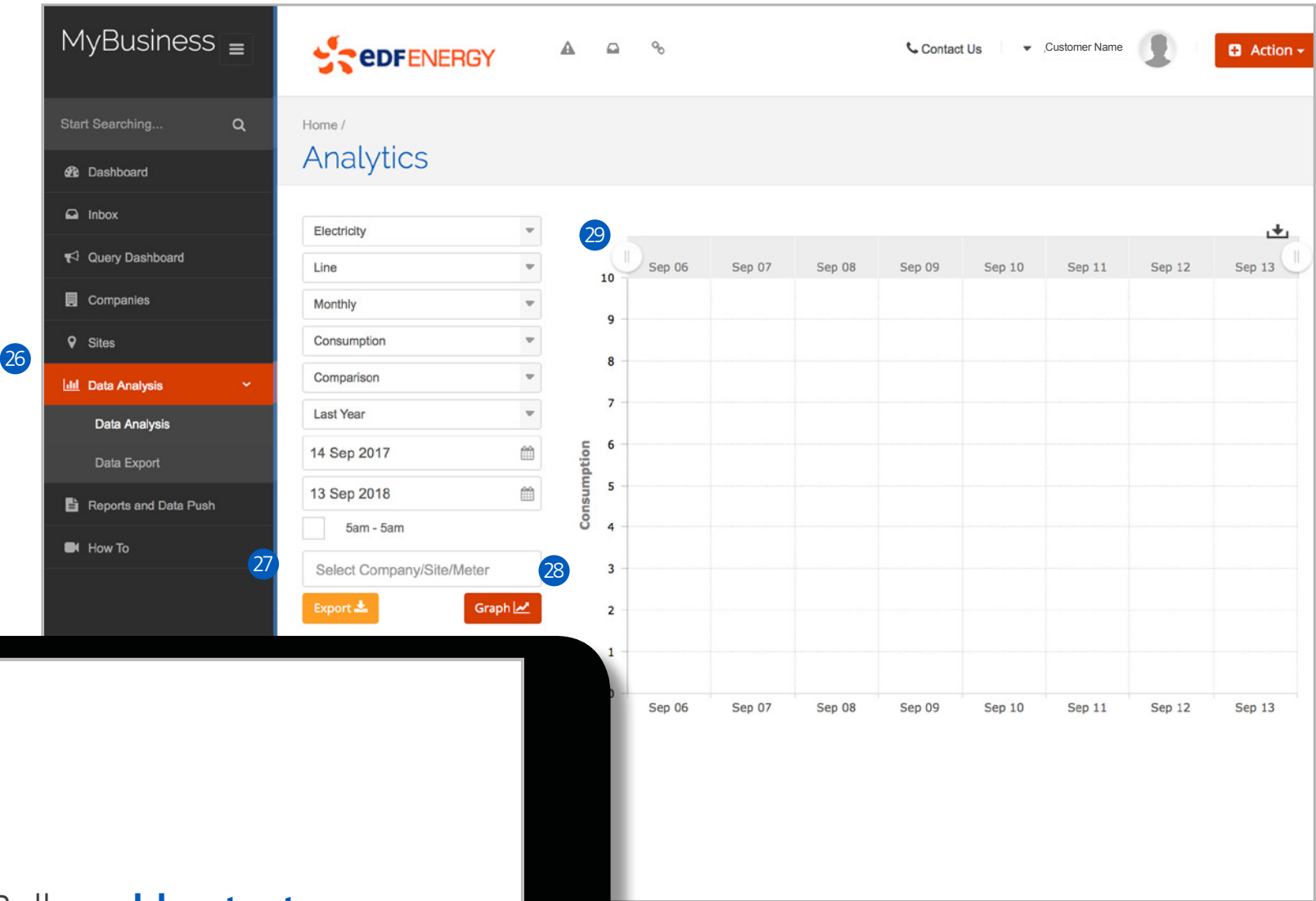
› Data export

› Reports

› Queries

Data analysis

- 26 You can analyse your customers energy consumption by clicking on the **Data Analysis** button in the main navigation.
- 27 **Search** up to five meters using the search box.
- 28 Press the **graph button** to display the data.
- 29 You can zoom by using the **zoom bar** at the top or by clicking and by drag-click.



Rollover **blue text** or **1** numbers on the screen illustration to reveal details.

› Logging in and getting around

› View paperless and copy bills

☑ View your customers consumption data

› Data analysis

› Data export

› Reports

› Queries

Data export

- 30 If you wish to download a large volume of data to csv or xlsx use the [Data Export](#) facility by clicking on the data export button in the main navigation.
- 31 Check and [refine](#) your export.
- 32 Once you've refined your data click [Export Data](#).

MyBusiness

Start Searching...

Dashboard

Inbox

Query Dashboard

Companies

Sites

Data Analysis

Data Analysis

Data Export

Reports and Data Push

How To

EDF ENERGY

Contact Us

Customer Name

Action

Home /

Data Export

By default users will have access to all meters in their company. By selecting meters, you will have to assign meters to that user

31

Monthly

Consumption

Comparison

Last Year

14 Sep 2017

13 Sep 2018

Export Data

Est Download Time (Max) : 76s

Unassigned

Sample Plc

Filter Results

32

Assigned

Sample Plc

1 High Street 00000000 000000

2 High Street 00000000 000000

16 Broadway 00000000 000000

4 High Street 00000000 000000

5 High Street 00000000 000000

27 High Street 00000000 000000

7 High Street 00000000 000000

8 High Street 00000000 000000

9 High Street 00000000 000000

10 High Street 00000000 000000

15 Broadway 00000000 000000

5 High Street 00000000 000000

34-35 High Street 00000000 000000

17 Broadway 00000000 000000



Rollover [blue text](#) or 1 numbers on the screen illustration to reveal details.

› Logging in and getting around

› View paperless and copy bills

View your customers consumption data

› Data analysis

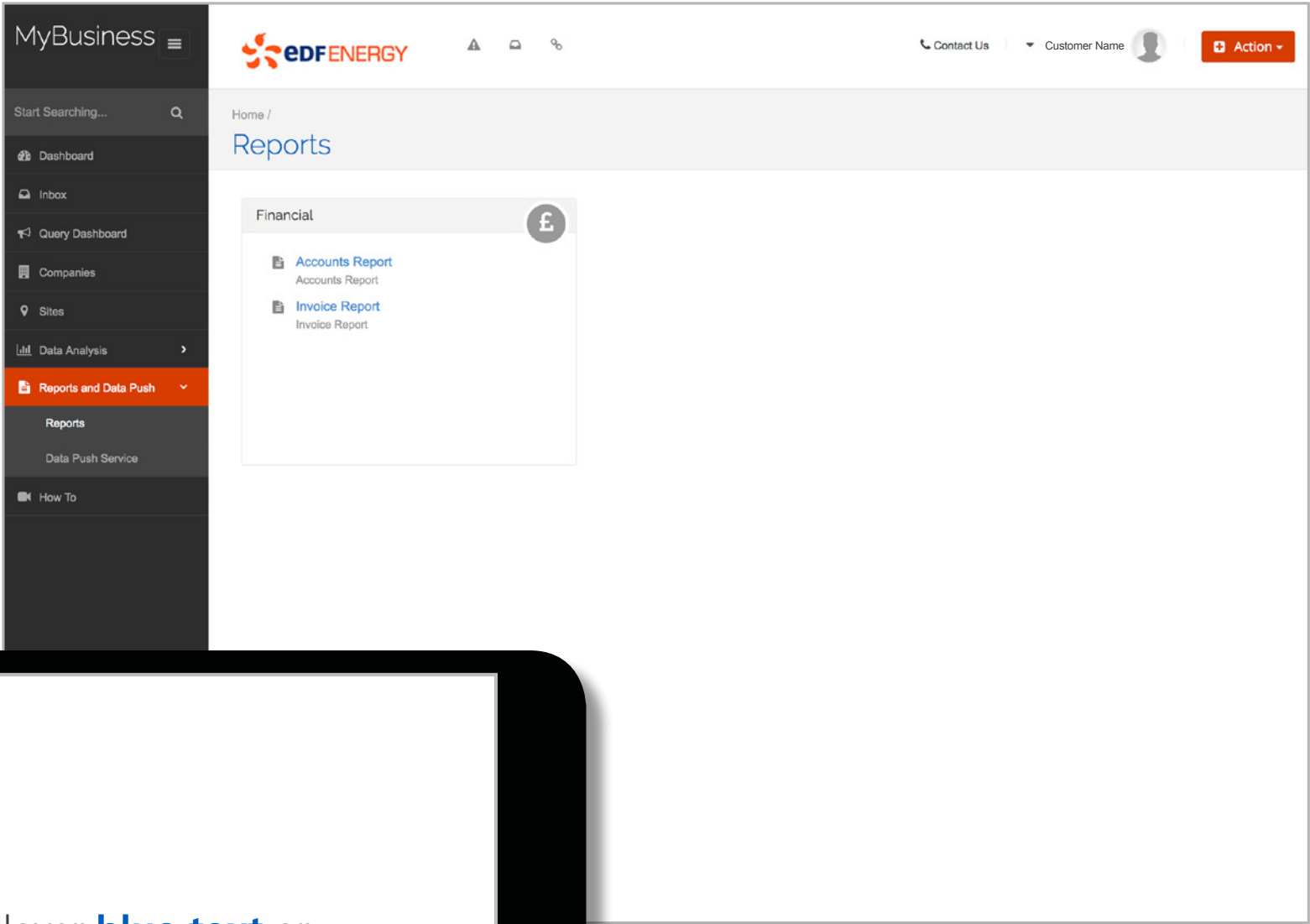
› Data export

› Reports

› Queries

Reports

- 33 In the main navigation click on the [Reports](#) link to display a selection of reports:
- Accounts
 - Invoice
- 34 You can [filter reports](#) by specific date ranges or use the search button drop down to access popular date ranges.
- 35 To download click the [download icon](#) at the top right of the report.



Rollover [blue text](#) or 1 numbers on the screen illustration to reveal details.

- › Logging in and getting around
- › View paperless and copy bills
- › View your customers consumption data
- › Data analysis
- › Data export

🕒 Reports

- › Queries

Online query management

Raise all your requests in one place, from updating a contact to changing the billing address.

You can also track your query from initial contact to resolution with regular updates.

› Logging in and getting around

› View paperless and copy bills

› View your customers consumption data

› Reports

🔍 Queries

› Raising a query

› Query notifications

Raising a query

- 36 You can raise a query at any time by clicking [Raise a Query](#) on the action button.
- 37 [Select or search](#) for a query category from the drop down list.
- 38 [Add details](#) about your query.
- 39 [Submit](#) your query.
- 40 Every time the query is updated you will receive an [e-mail alert](#) to keep you informed.

4036373839

MyBusiness

Start Searching...

Dashboard

Inbox

Query Dashboard

Companies

Sites

Data Analysis

Reports and Data Push

How To

edfENERGY

Contact Us

Customer Name

Action

Change your password

Raise a Query

Watch the introduction video

Dashboard Manager

Submit Multiple Meter Readings

Home /

Sample Plc (3rd Party)


Ref: 3116100000

Overview

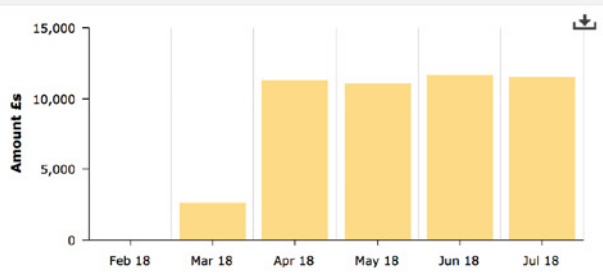
Documents (0)

Feed

Map



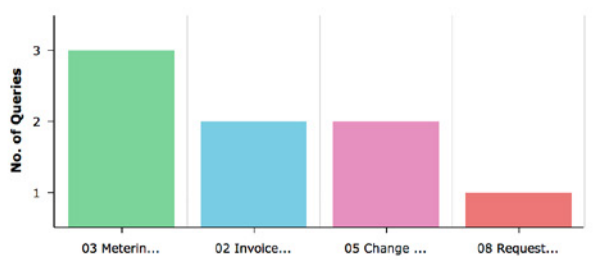
Customer Cost (Power)



Latest Invoices

Invoice No.	Account No.	Due Date	Value
		Aug 2018	£0.00
		g 2018	£0.00
		g 2018	£0.00
		g 2018	£0.00
		g 2018	£0.00

Open Queries



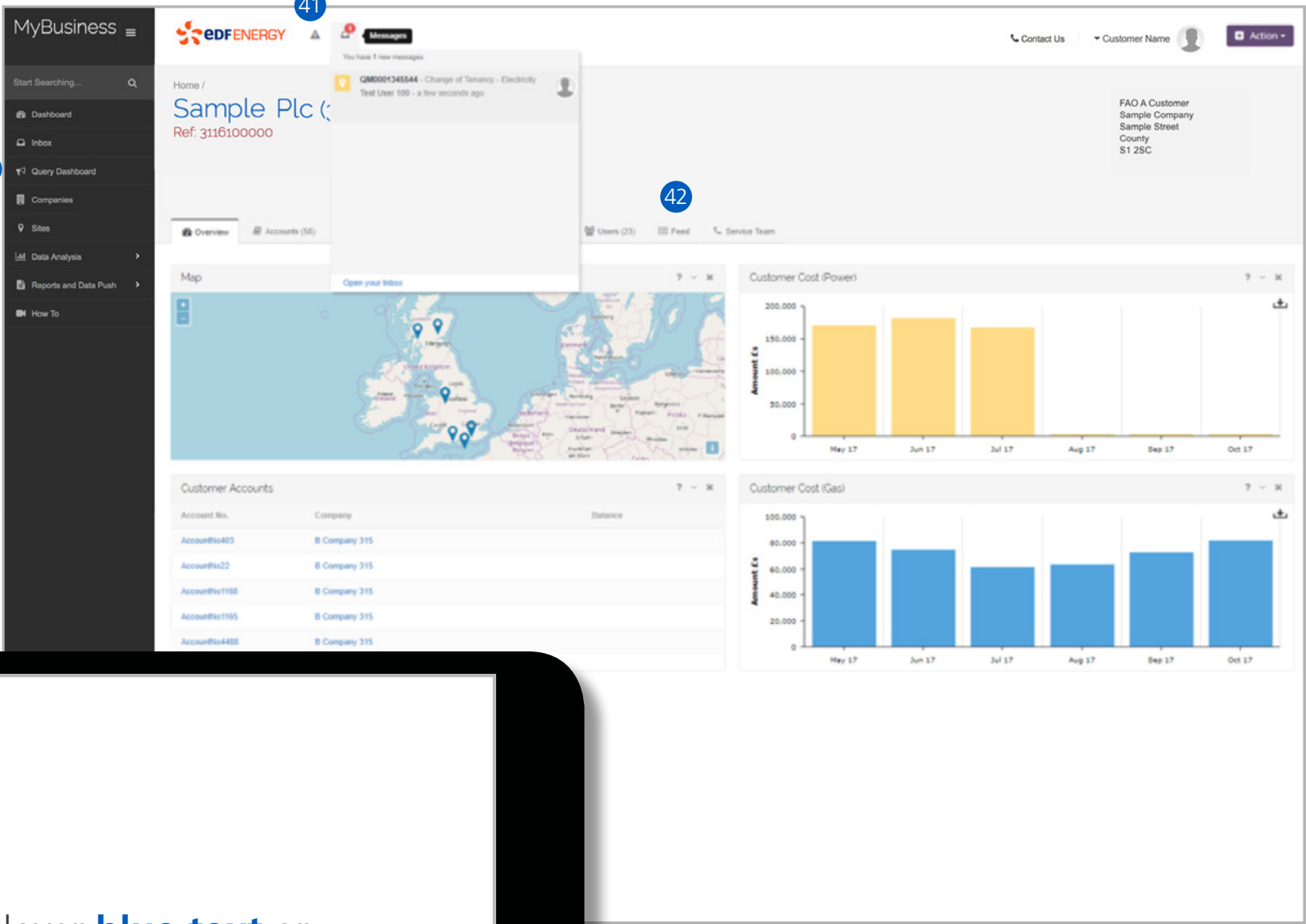


Rollover [blue text](#) or 1 numbers on the screen illustration to reveal details.

- › Logging in and getting around
- › View paperless and copy bills
- › View your customers consumption data
- › Reports
- 🕒 Queries
- › Raising a query
- › Query notifications

Query notifications

- 41 Every time the query is updated you will receive an [e-mail alert](#) to keep you informed.
- 42 Replying to a query via the [Feed tab](#).
- 43 Viewing your [Query Dashboard](#)



Rollover [blue text](#) or 1 numbers on the screen illustration to reveal details.

- › Logging in and getting around
- › View paperless and copy bills
- › View your customers consumption data
- › Reports
- ☑ Queries
 - › Raising a query
 - › **Query notifications**

e-guides - a better way of working

Why an e-guide? At EDF Energy we are committed to using the most sustainable working practices wherever possible and this includes when delivering communications to our customers.

E-guides significantly reduce the volume of printed material we need, reducing our carbon footprint.

Our customers appreciate e-guides because they offer timely delivery of easy to access information in an ideal format for the modern screen based working environment.

edfenergy.com/largebusiness

To view our fuel mix visit edfenergy.com