

# MyBusiness

User guide for large business customers



**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 energy account online.

MyBusiness makes it easy to manage your energy accounts online, at any time:

- ✓ analyse and understand your 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.

## Logging in and getting around

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

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- › View your paperless and copy bills

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- › View your consumption data

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- › Reports

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- › Submit a meter reading

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- › Queries

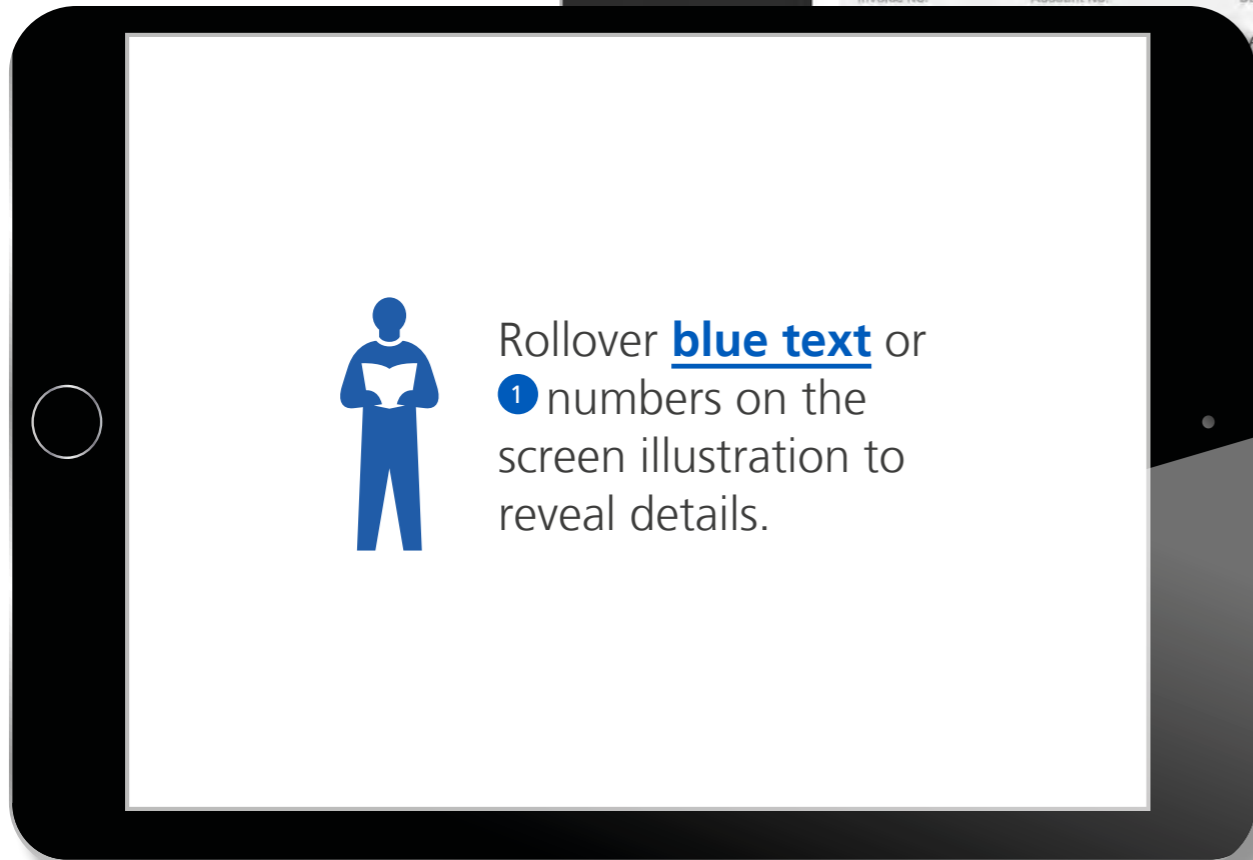
Problems logging in?  
Call us on 0845 301 3515

# 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 electricity account 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**

The screenshot shows the MyBusiness interface for a client named Edf Energy Plc. On the left is a dark sidebar with navigation options. At the top is a search bar and a main navigation bar with tabs for Overview, Accounts (67), Sites (37), Contracts (25), Documents (78), Users (2), Feed, and 3rd Parties with Access. Below this are several widgets: a map of the UK with location pins, a bar chart showing Customer Cost (Power) in £ over time, a table of Latest Invoices, and a bar chart showing the number of Open Queries for different categories.

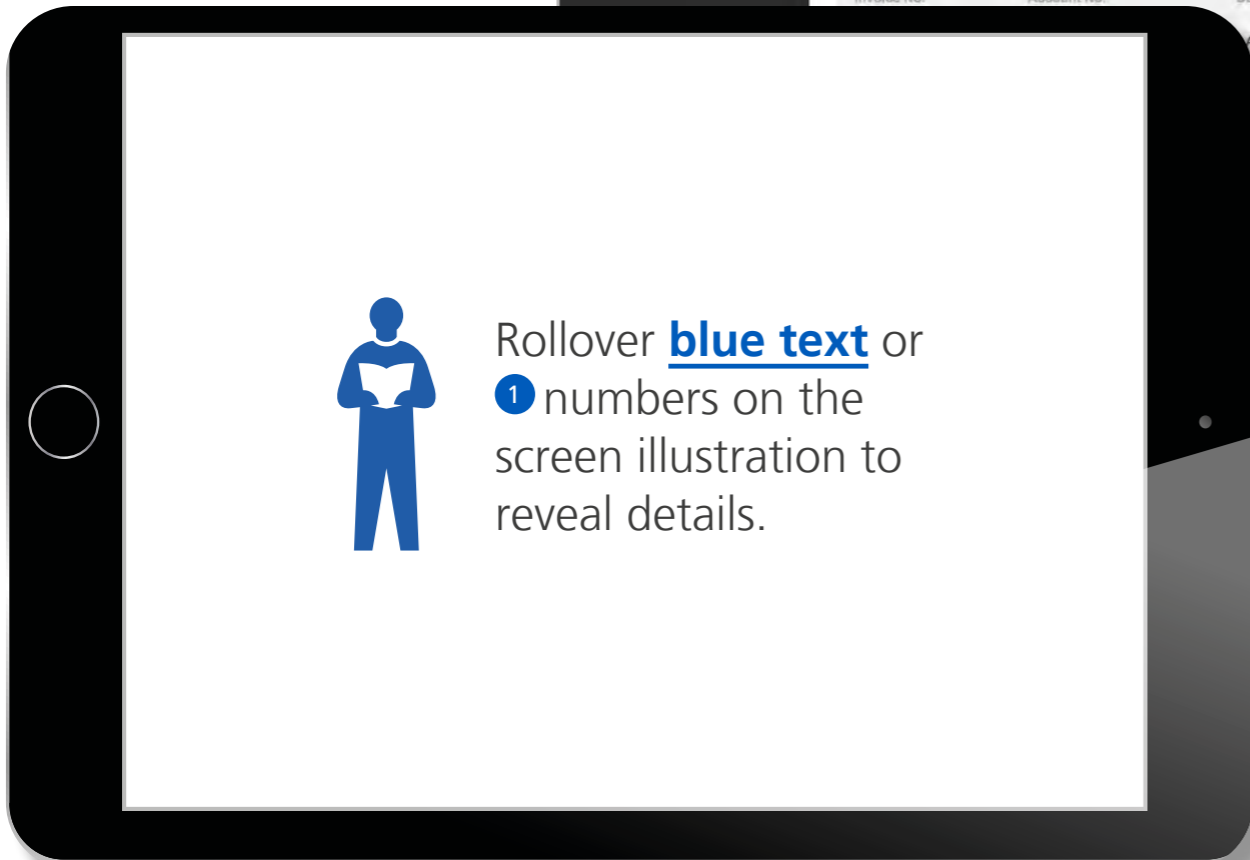


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# Main navigation

- 6 [Search](#)
- 7 [Dashboard](#)
- 8 [Inbox](#)
- 9 [Query Dashboard](#)
- 10 [Companies & Sites](#)
- 11 [Data Analysis](#)

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# Main navigation

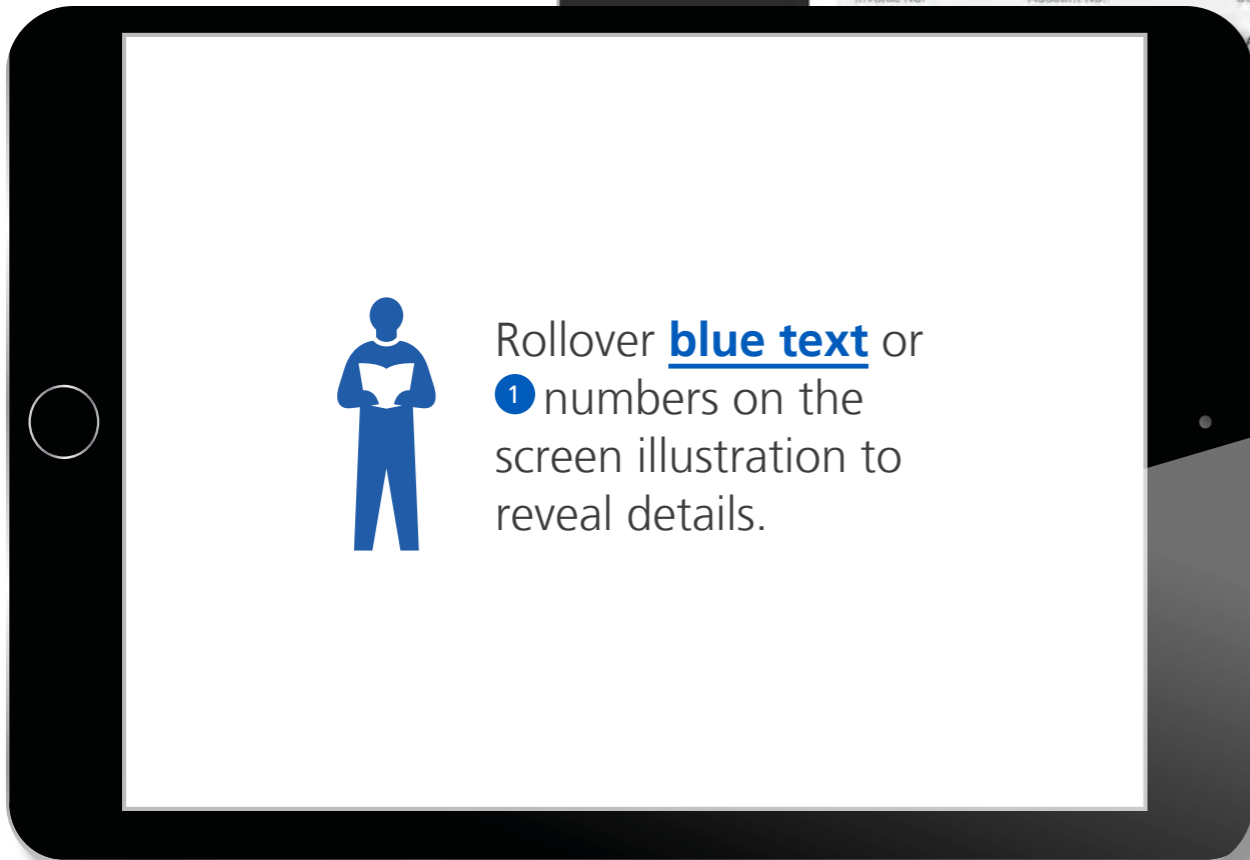
12 [Reports and Data Push](#)

13 [How To](#)

14 [Shortcut icons](#)

15 [Actions](#)

The screenshot shows the MyBusiness EDF web interface. The sidebar on the left contains navigation options: Dashboard, Inbox, Query Dashboard, Companies, Sites, Data Analysis, Reports and Data Push, and How To. The main content area displays the EDF logo, user profile, and a dashboard for 'Edf Energy Plc (Client)'. The dashboard includes a map of the United Kingdom, a bar chart for 'Customer Cost (Power)', and a table for 'Latest Invoices'. Blue circles with numbers 12, 13, 14, and 15 are overlaid on the interface to indicate specific features.



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# Action tabs

16 [Overview](#)

17 [Accounts](#)

18 [Sites](#)

19 [Contracts](#)

20 [Documents](#)

21 [Users](#)

22 [Feed](#)

23 [3rd Parties with Access](#)

The screenshot shows the MyBusiness EDF interface for a client named Edf Energy Plc. The dashboard features a navigation menu on the left with options like Dashboard, Inboxes, Query Dashboard, Companies, Sites, Data Analysis, Reports and Data Push, and How To. The main content area includes a search bar, a map of the UK, a bar chart showing Customer Cost (Power) from Feb 18 to Jul 18, a table of Latest Invoices, and a bar chart of Open Queries. Blue circles with numbers 16-23 are overlaid on the dashboard to indicate the location of the 'Action tabs'.



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

## Logging in and getting around

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# 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.

**24** To customise your dashboard simply click the **Action** menu and select Dashboard Manager.

The screenshot shows the MyBusiness interface for a client named Edf Energy Plc. The dashboard is organized into several sections:

- Navigation:** A left-hand menu with options like Dashboard, Inbox, Query Dashboard, Companies, Sites, Data Analysis, and Reports and Data Push. A top navigation bar includes 'Contact Us', 'Customer Name', and an 'Action' menu.
- Client Information:** Displays 'Edf Energy Plc (Client)' with a reference number 'Ref. 1000000000' and a 'Total Balance: £0'.
- Overview Widgets:**
  - Map:** A map of Europe with location pins.
  - Customer Cost (Power):** A bar chart showing monthly power costs from Feb 18 to Jul 18. The y-axis is labeled 'Amount £s' and ranges from 0 to 15,000.
  - Latest Invoices:** A table with columns for Invoice No., Account No., Due Date, and Value. The value column shows '£0.00' for several entries from Aug 2018.
  - Open Queries:** A bar chart showing the number of open queries for different categories: '03 Meterin...', '02 Invoice...', '05 Change ...', and '08 Request...'. The y-axis is labeled 'No. of Queries' and ranges from 0 to 3.



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## Logging in and getting around

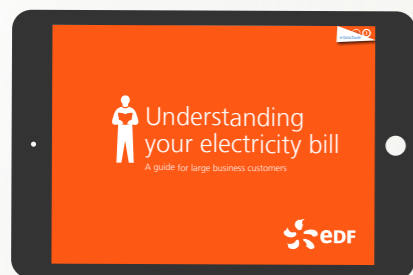
- › Getting started
- › Main navigation
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- › **Customise your dashboard**
- › View your paperless and copy bills
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# View your paperless and copy bills...

... 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 bill?

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



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

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## Viewing your single site bills

**25** In order to see a single site bill or credit note, first select the **Accounts tab**. You will then be presented with a list of your accounts you have access to.

**26** Click on the **account number** you wish to view an invoice or credit note for and you will open the account page.

The screenshot shows the MyBusiness portal interface. The top navigation bar includes the EDF logo, a search bar, and a user profile section. The main content area displays the 'Accounts (86)' tab, which contains a table of accounts. The table has columns for Account Number, Parent Account, Account Type, User Reference, Payment Method, Payment Terms (Days), and Current Balance. The first row is highlighted, and a blue circle with the number 26 is overlaid on the account number '000000000'.

Account Number	Parent Account	Account Type	User Reference	Payment Method	Payment Terms (Days)	Current Balance
000000000	510000000	Electricity only		DD	60 days from invoice date	£0.00
000000000		Electricity only		DD	14 days from invoice date	£0.00
000000000		Electricity only		DD	60 days from invoice date	£0.00
000000000	410000000	Electricity only		DD	60 days from invoice date	£0.00
000000000		Electricity only		CHEQUE	14 days from invoice date	£0.00
000000000	510000000	Electricity only		DD	14 days from invoice date	£0.00
000000000		Electricity only		DD	60 days from invoice date	£0.00
000000000		Electricity only		DD	60 days from invoice date	£0.00
000000000		Electricity only		DD	60 days from invoice date	£0.00
000000000		Electricity only		CHEQUE	14 days from invoice date	£0.00
000000000		Electricity only		CHEQUE	14 days from invoice date	£0.00
000000000		Electricity only		CHEQUE	14 days from invoice date	£0.00
000000000		Electricity only		DD	60 days from invoice date	£0.00
000000000		Electricity 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 your paperless and copy bills**

› Viewing your single site bills & credit notes

› Viewing your consolidated bills

› View your consumption data

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## Viewing your consolidated bills

**27** In order to see a consolidated bill or credit note, first select the [Accounts tab](#).

**28** Click on a [parent account](#), and you will open the account page.

**29** Select the Invoices tab and then click on the [invoice number](#) you wish to view an consolidated bill for.

The screenshot shows the MyBusiness EDF portal. The left sidebar contains navigation options: Dashboard, Inbox, Query Dashboard, Companies, Sites, Data Analysis, Reports and Data Push, and How To. The main content area displays the EDF logo and user information. Below this, there are tabs for Overview, Accounts (86), Sites (52), Contracts (26), Documents (39), Feed, and 3rd Parties with Access. A table lists account details with columns for Account Number, Parent Account, Account Type, User Reference, Payment Method, Payment Terms (Days), and Current Balance. A blue circle with the number 27 highlights the Accounts tab, and another blue circle with the number 28 highlights a parent account in the table.

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
0000000000		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
0000000000		Electricity only		DD	60 days from invoice date	£0.00
0000000000		Electricity only		DD	60 days from invoice date	£0.00
0000000000		Electricity only		DD	60 days from invoice date	£0.00
0000000000		Electricity only		CHEQUE	14 days from invoice date	£0.00
0000000000		Electricity only		CHEQUE	14 days from invoice date	£0.00
0000000000		Electricity only		CHEQUE	14 days from invoice date	£0.00
0000000000		Electricity only		DD	60 days from invoice date	£0.00
0000000000		Electricity only		DD	60 days from invoice date	£0.00



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› Logging in and getting around

### View your paperless and copy bills

› Viewing your single site bills

› Viewing your consolidated bills

› View your consumption data

› Reports

› Submit a meter reading

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## View your consumption data

Viewing your 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 your paperless and copy bills

⌕ **View your consumption data**

› Data analysis

› Data export

› Reports

› Submit a meter reading

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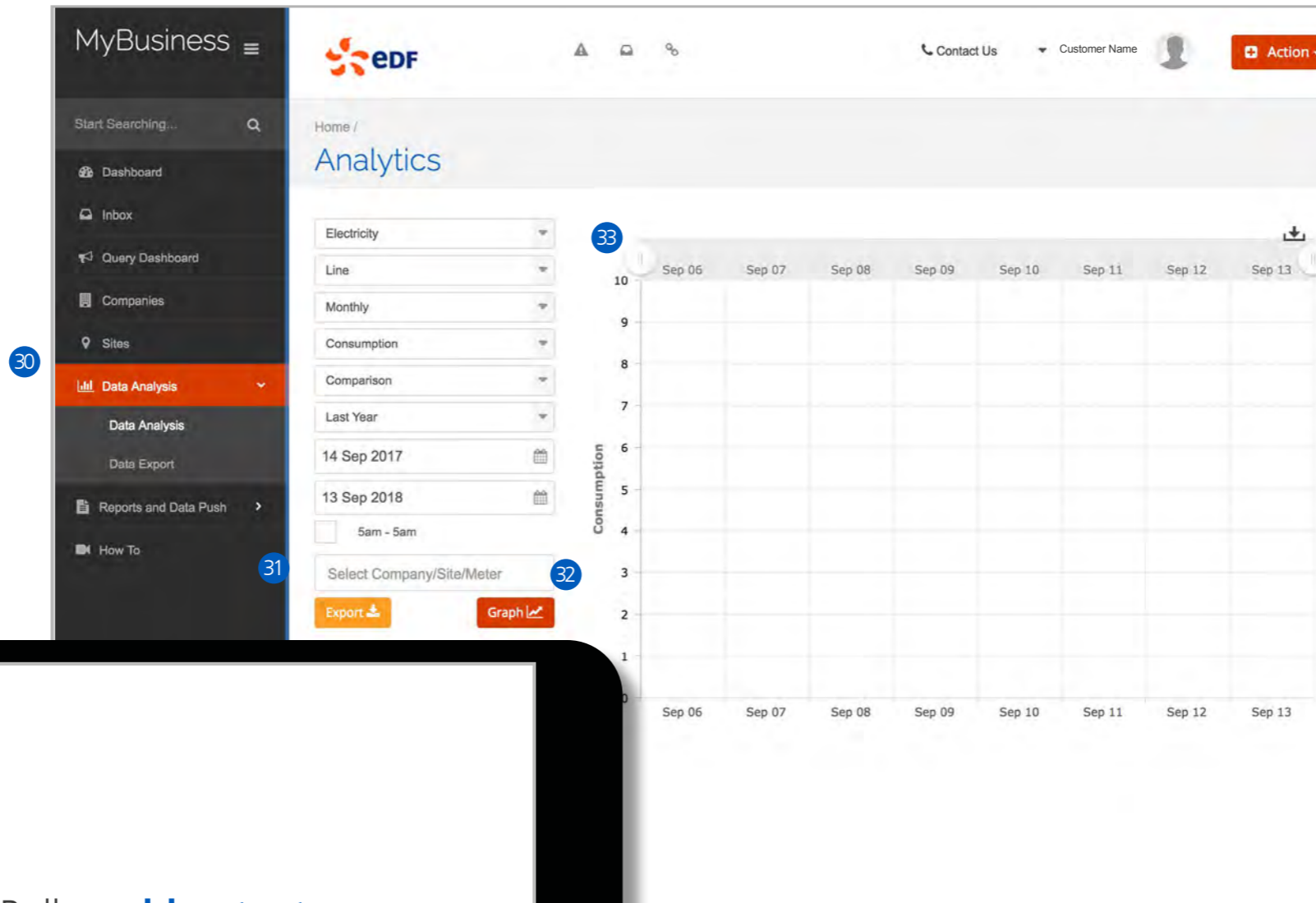
## Data analysis

**30** You can analyse your energy consumption by clicking on the **Data Analysis** button in the main navigation.

**31** **Search** up to five meters using the search box.

**32** Press the **graph button** to display the data.

**33** You can zoom by using the **zoom bar** at the top or by clicking and by drag-click.



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- › Logging in and getting around
- › View your paperless and copy bills

### View your consumption data

- › **Data analysis**
- › Data export
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## Data export

- 34 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.
- 35 Check and [refine](#) your export.
- 36 Once you've refined your data click [Export Data](#).

MyBusiness

Start Searching

Dashboard

Inbox

Query Dashboard

Companies

Sites

Data Analysis

Data Export

Reports and Data Push

How To

EDF

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

Unassigned

Assigned

Edf Energy Plc

Filter Results

Monthly

Consumption

Comparison

Last Year

14 Sep 2017

13 Sep 2018

Export Data

Est. Download Time (Max): 76s

Edf Energy 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



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### View your consumption data

- › Data analysis
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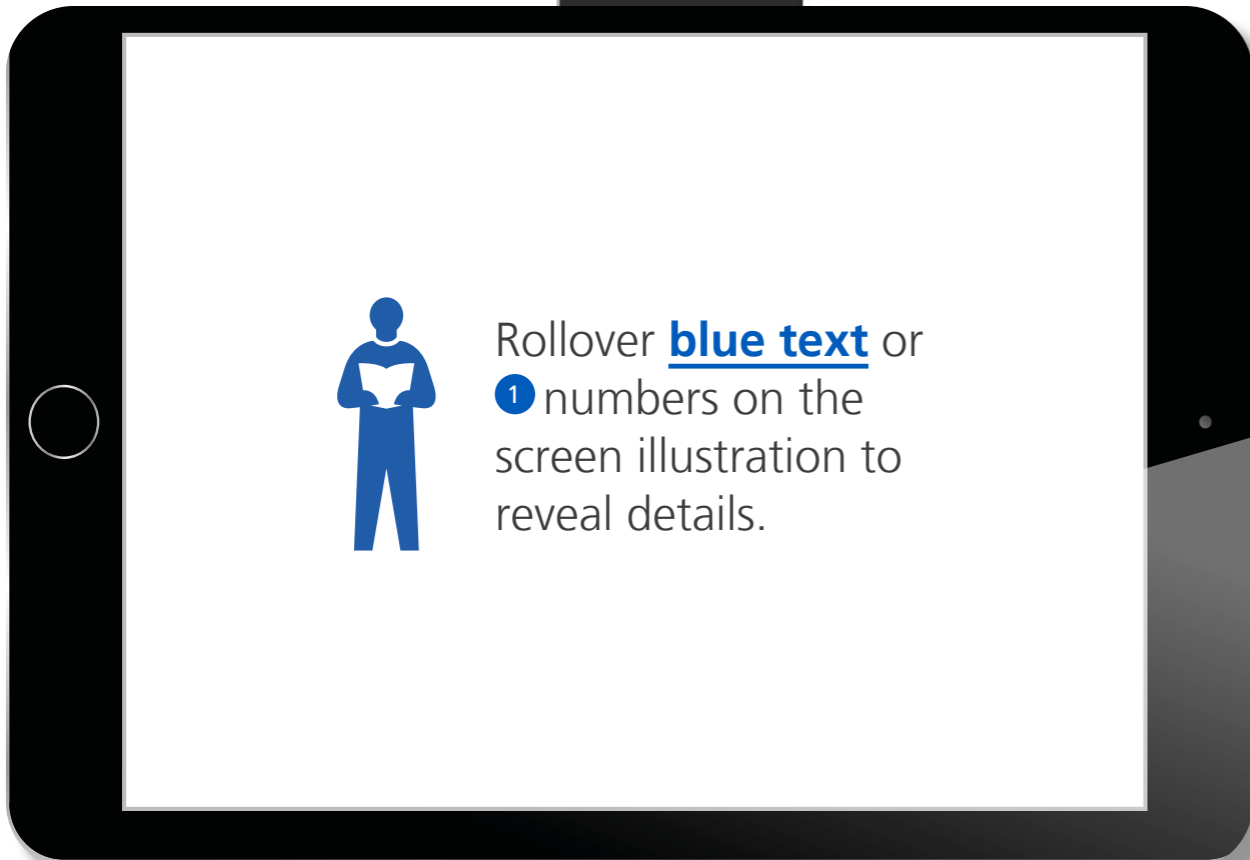
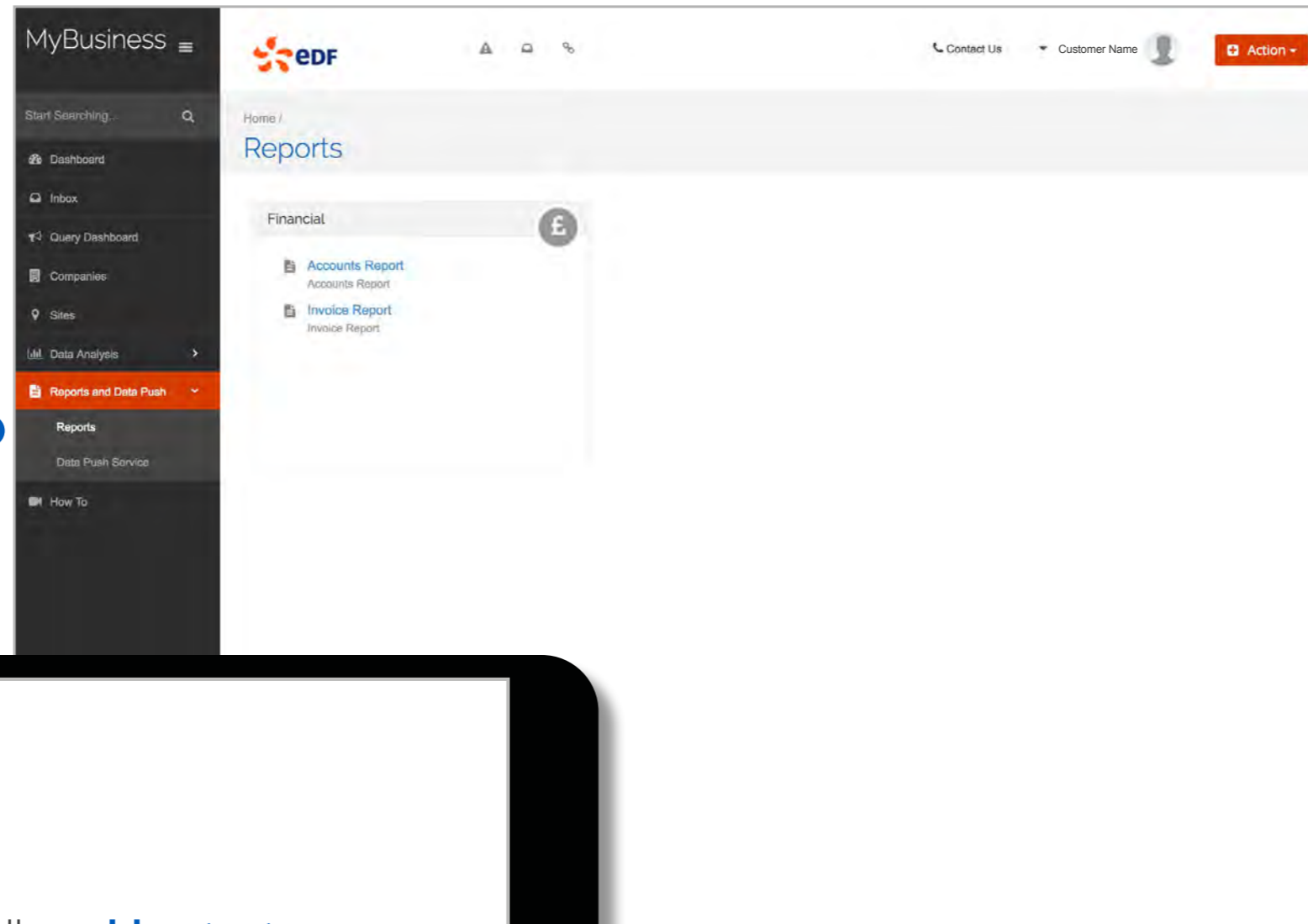
# Reports

**37** In the main navigation click on the [Reports](#) link to display a selection of reports:

- Accounts
- Invoice

**38** You can [filter reports](#) by specific date ranges or use the search button drop down to access popular date ranges.

**39** To download click the [download icon](#) at the top right of the report.



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

## 🕒 Reports

- › Submit a meter reading
- › Queries

## Meter reads

- 40 To submit a meter read, first select the required site from the [Sites Tab](#)
- 41 Select your site link and then click the [Electricity Meters Tab](#). Here you will find all meters associated with that site. Under Action button select [Submit Meter Reading](#).
- 42 Enter a reading date and the meter read, then simply click [Submit Readings](#) to submit your reading.

Site Name	Company	Address	City	County	Post Code	Status	Contact	MPANs
14 Sample Square	Edf Energy Plc	14 Sample Square	City		SAM PL2	Active		1
25 Sample Street	Edf Energy Plc	25 Sample Street	City		STR PL3	Active		8
14 Sample Square	Edf Energy Plc	14 Sample Square	City		SAM PL2	Active		1
25 Sample Street	Edf Energy Plc	25 Sample Street	City		STR PL3	Active		8
14 Sample Square	Edf Energy Plc	14 Sample Square	City		SAM PL2	Active	Primary User 37477	1
25 Sample Street	Edf Energy Plc	25 Sample Street	City		STR PL3	Active		2
14 Sample Square	Edf Energy Plc	14 Sample Square	City		SAM PL2	Active		1
25 Sample Street	Edf Energy Plc	25 Sample Street	City		STR PL3	Active		8
14 Sample Square	Edf Energy Plc	14 Sample Square	City		SAM PL2	Active		1
25 Sample Street	Edf Energy Plc	25 Sample Street	City		STR PL3	Active		8
14 Sample Square	Edf Energy Plc	14 Sample Square	City		SAM PL2	Active	Primary User 37477	1



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- › Reports
- ⌚ **Submit a meter reading**
- › 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 your paperless and copy bills
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- › Reports
- › Submit a meter reading

## 🕒 Queries

- › Raising a query
- › Query notifications

## Raising a query

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

The screenshot shows the MyBusiness EDF portal interface. At the top, there's a navigation bar with 'Contact Us', 'Customer Name', and an 'Action' dropdown menu. The main content area displays the customer profile for 'Edf Energy Plc (Client)' with a reference number and a total balance of £0. Below this, there are several widgets: a map of Europe with location pins, a 'Customer Cost (Power)' bar chart showing costs from Feb 18 to Jul 18, a 'Latest Invoices' table with columns for Invoice No., Account No., Due Date, and Value, and an 'Open Queries' bar chart showing the number of queries for different categories like '03 Meterin...', '02 Invoice...', '05 Change ...', and '08 Request...'. A blue circle with the number '47' is positioned at the top center of the dashboard area.



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

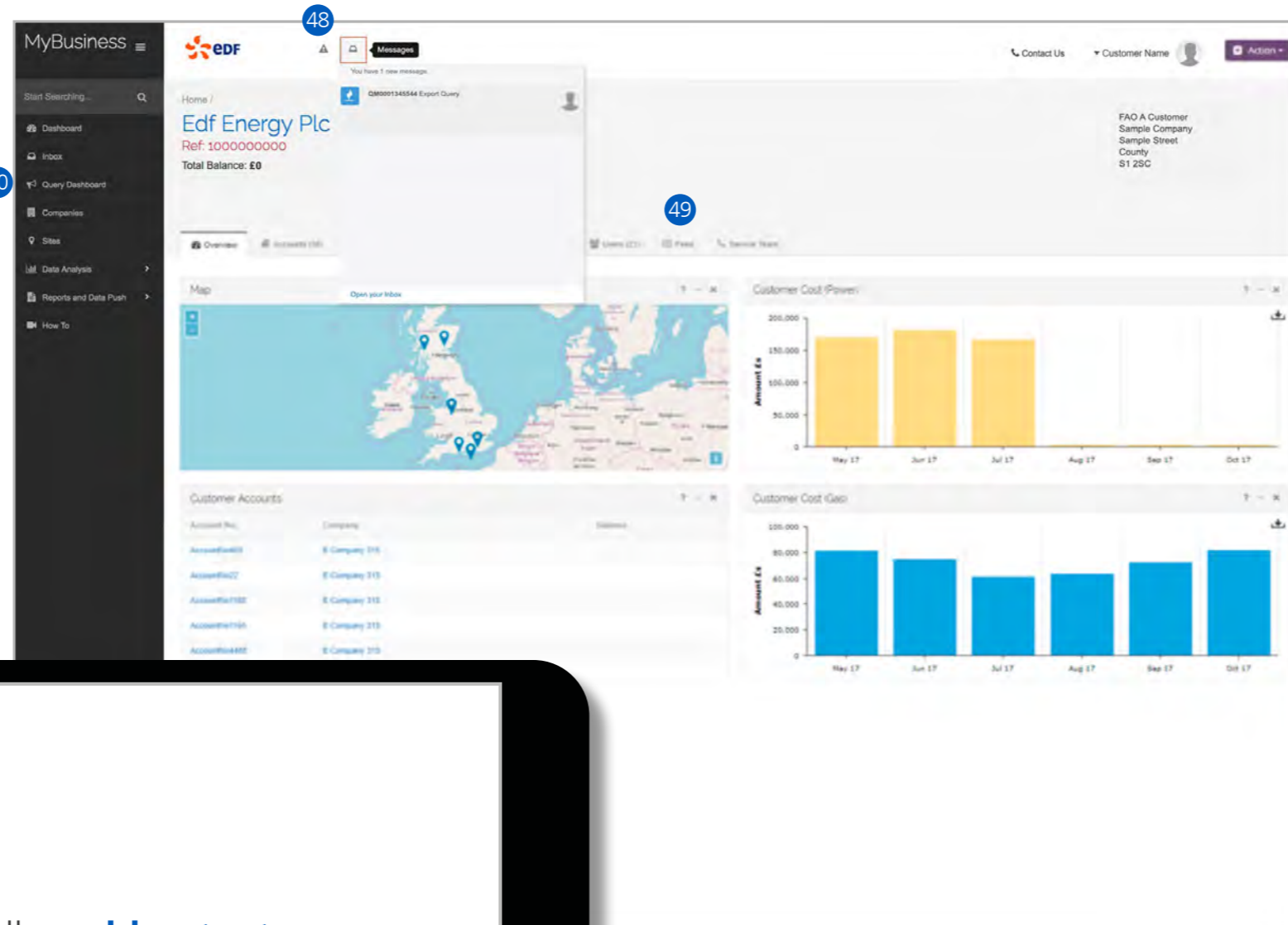
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- ⊖ **Queries**
  - › Raising a query
  - › Query notifications

# Query notifications

**48** Every time the query is updated you will receive an **e-mail alert** to keep you informed.

**49** Replying to a query via the **Feed tab**.

**50** Viewing your **Query Dashboard**



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

- › Logging in and getting around
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## Queries

- › Raising a query
- › **Query notifications**

## e-guides - a better way of working

Why an e-guide? At EDF 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](https://edfenergy.com/largebusiness)**

To view our fuel mix visit [edfenergy.com](https://edfenergy.com)