



My SEFE Energy User Guide

October 2024

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Overview of functionality

	Functionality (Gas / Power)	Gas	Power
Dashboard	My account balance	Yes	No
	My latest invoice / Invoices	Yes	Yes
	My latest gas reading / Meter reading	Yes	Yes
	My contract details	Yes	No
	Renew or agree a new contract	Yes	No
Metering	Submit meter reading	Yes	Yes
	Submit multiple meter readings	Yes	No
	View meter reading history	Yes	No
Invoicing	For all accounts	Yes	No
	For account / For group account	Yes	Yes
	For agreement / For account	Yes	Yes
Balance	View and download	Yes	No
Billing reports	For all accounts / For account	Yes	No
Consumption and cost reports	Consumption reports	Yes	Yes
	Energy cost reports	Yes	No
	Cost of fuel reports	Yes	No
	AMR and smart metering	Yes	Yes
Manage my details	Manage site details	Yes	No
	Change password	Yes	Yes
Admin	Add users	Yes	Yes
	Manage existing users	Yes	Yes

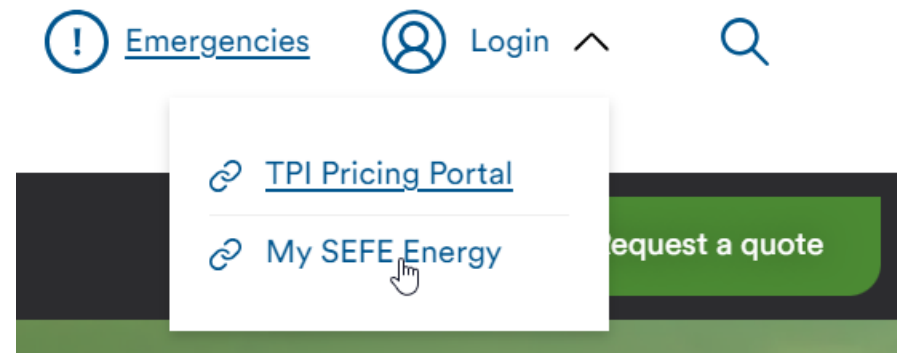
Accessing the portal

You can access the portal via this link:

<https://my.sefe-energy.co.uk/>

Alternatively, you can access the portal via the SEFE Energy website:

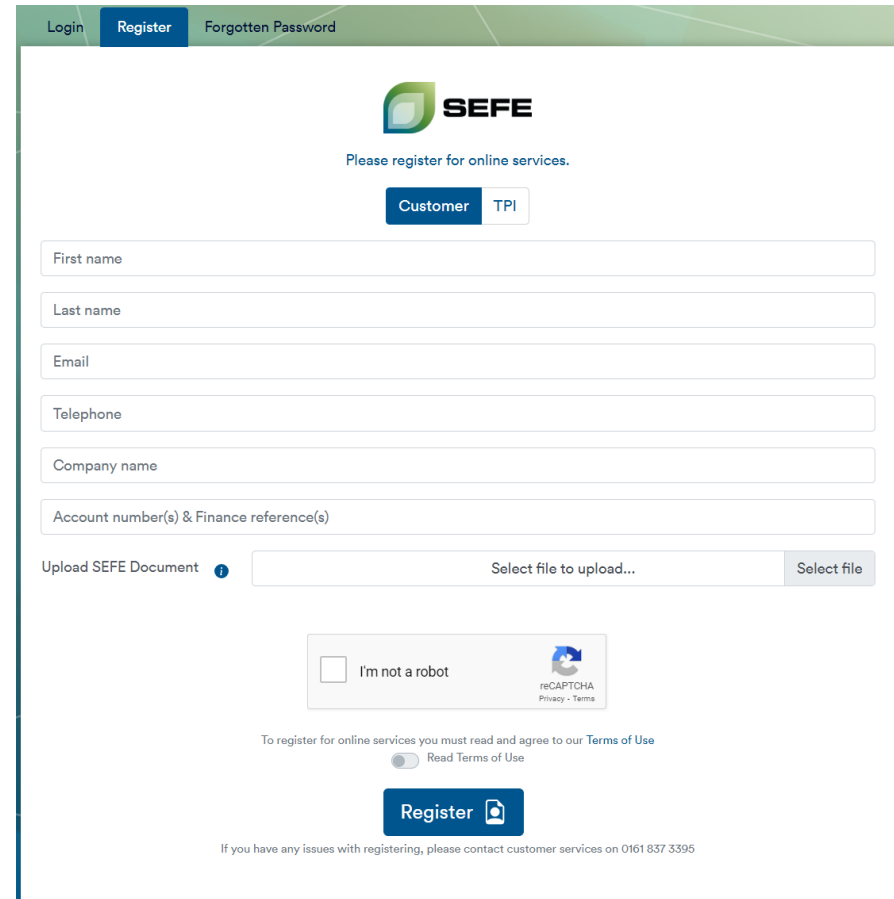
1. Select Login
2. Select My SEFE Energy



Registering as a new user – customer

To register as a customer:

1. Navigate to the register tab
2. Select the Customer tab
3. Fill in the form
4. Upload a SEFE Document that has been sent to you. This is for validation purposes.
5. Select the Terms of use link and scroll to the bottom to accept
6. Select Register



The screenshot shows the SEFE registration interface. At the top, there are navigation tabs: "Login", "Register" (which is active), and "Forgotten Password". Below the navigation is the SEFE logo and the text "Please register for online services." There are two tabs for registration: "Customer" (selected) and "TPI". The registration form consists of several input fields: "First name", "Last name", "Email", "Telephone", "Company name", and "Account number(s) & Finance reference(s)". Below these fields is an "Upload SEFE Document" section with a file selection button "Select file to upload..." and a "Select file" button. A reCAPTCHA "I'm not a robot" checkbox is present. Below the reCAPTCHA, there is a toggle switch for "Read Terms of Use" and a "Register" button with a user icon. At the bottom, there is a footer note: "If you have any issues with registering, please contact customer services on 0161 837 3395".

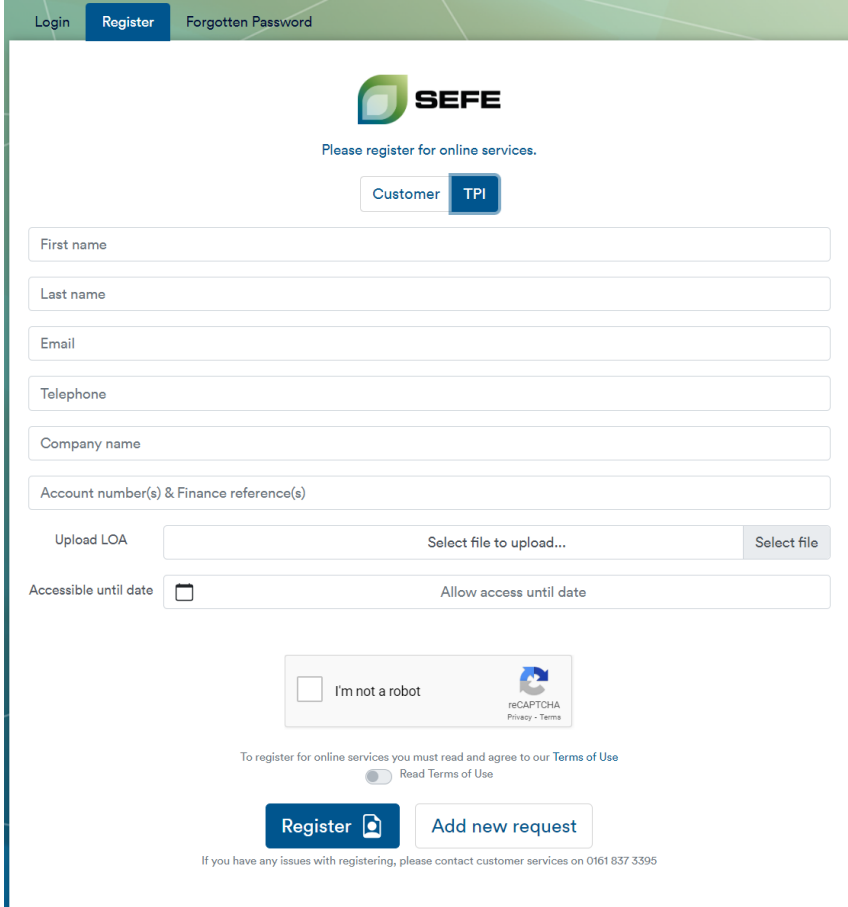
Registering as a new user – TPI

To register as a TPI:

1. Navigate to the Register tab
2. Select the TPI tab
3. Fill in the form
4. Click Select file to upload a Letter of Authority (LOA) document
5. Click Allow access until date to select the date for which you are authorised to have access to the account(s)
(Note: This should match what is in the LOA document)
6. Select the Terms of use link and scroll to the bottom to accept
7. Select Register

To register as a TPI with multiple account requests:

1. Follow steps 1-7 above for initial account request
2. Click Add new request
3. Fill in Account number(s) & Finance reference(s) field, Upload LOA file and select Accessible until date for the new request
4. Click Add new request
5. Repeat steps 3-4 for as many new requests you want
6. Click Register to submit all requests in the list



Add new request

Requests **3**

Firstname	Lastname	Email	Telephone	Company Name	Account Number	Finance Reference	LOA	Actions
Name	Surname	email@email.com	0123456789	Company	10*****1		Download	Delete
Name	Surname	email@email.com	0123456789	Company	10*****2		Download	Delete
Name	Surname	email@email.com	0123456789	Company	10*****3		Download	Delete

Register

Selection tool

The selection tool is present throughout the portal and allows you to easily select between your different accounts and agreements.

- If you have both gas and power accounts with SEFE Energy, you can use the Energy selection box to select either Gas or Power.

Given you have gas selected:

- You can select a different account using the Account selection box.
 - Use the MPRN selection box to select between any MPRNs associated with the selected account.
 - Use the Agreement selection box to select between any agreements associated with the selected account and MPRN.

Energy:	Account:	MPRN:	Agreement:
Gas	10234567 - Test Account	1234567891	AG12345678

Given you have power selected:

- You can select a different group account using the Group Account selection box.
 - Use the MPAN selection box to select between any MPANs associated with the selected group account.
 - Use the Account selection box to select between any accounts associated with the selected group account and MPAN.

Energy:	Group Account:	MPAN:	Account:
Power	10234567 - Test Group Account	1234567890123	PN012345 - TEST STREET

Greyed out selection boxes:

- Selection boxes that are unrelated to the page will be greyed out.
 - For example, the balance page for gas is only relevant at the account level, therefore the agreement and MPRN selection boxes are greyed out.

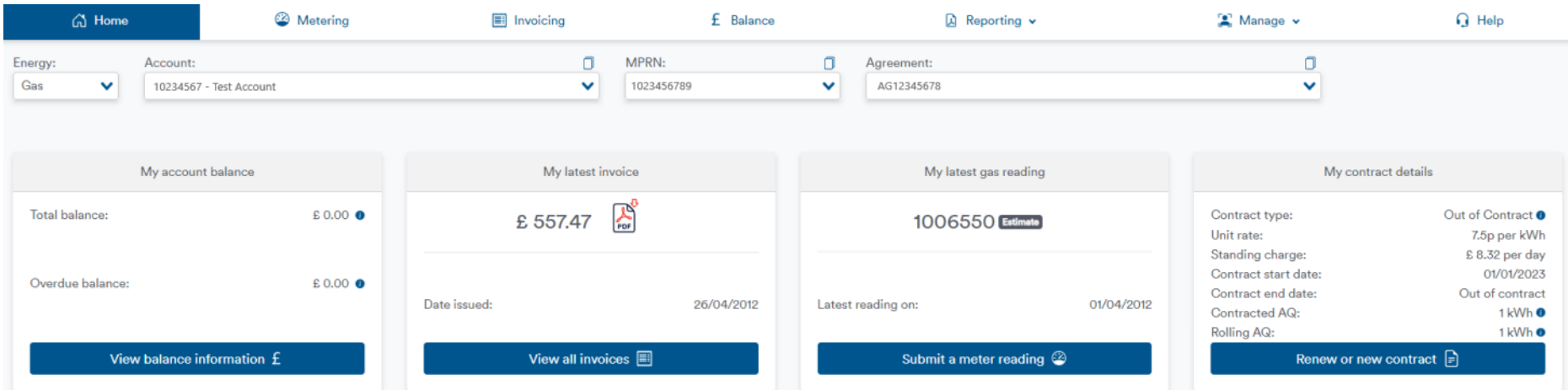
Home	Metering	Invoicing	£ Balance	Reporting	Manage
Energy:	Account:	MPRN:	Agreement:		
Gas	10234567 - Test Account	1234567890	AG00000001		

Gas – Dashboard

Dashboard

After logging in to the portal, you will see a dashboard displaying details about the selected account and agreement.

- My account balance (refers to selected account)
- My latest invoice (refers to selected agreement)
- My latest gas reading (refers to selected agreement)
- My contract details (refers to selected agreement)



The screenshot shows the SEFE Gas Dashboard interface. At the top, there is a navigation bar with links for Home, Metering, Invoicing, Balance, Reporting, Manage, and Help. Below the navigation bar, there are four selection fields: Energy (set to Gas), Account (10234567 - Test Account), MPRN (1023456789), and Agreement (AG12345678). The dashboard is divided into four main sections:

- My account balance:** Shows Total balance: £ 0.00 and Overdue balance: £ 0.00. A button "View balance information £" is at the bottom.
- My latest invoice:** Shows a total of £ 557.47 with a PDF icon. The date issued is 26/04/2012. A button "View all invoices" is at the bottom.
- My latest gas reading:** Shows a reading of 1006550 with an "Estimate" label. The latest reading on is 01/04/2012. A button "Submit a meter reading" is at the bottom.
- My contract details:** Lists contract information: Contract type: Out of Contract, Unit rate: 7.5p per kWh, Standing charge: £ 8.32 per day, Contract start date: 01/01/2023, Contract end date: Out of contract, Contracted AQ: 1 kWh, and Rolling AQ: 1 kWh. A button "Renew or new contract" is at the bottom.

Selecting another account and/or agreement using the selection tool will refresh the dashboard.

Gas – Submit meter reading

Navigating to the page

To get to the submit meter reading page you can:

- Select Submit a meter reading button on the gas dashboard
- OR navigate to the Metering menu option and select the Submit meter reading tab

Submitting a meter read

1. Ensure that the correct account, MPRN and agreement are selected in the selection tool at the top of the page
2. Enter Current meter reading date i.e. when you took the meter reading
3. Enter Current meter reading
4. Click Send

Note: To ensure you correctly enter a meter reading, use the [How to read your gas meter guide](#) which is linked on the page.

You should aim to submit your meter readings between the 25th and 5th for your meter read to be used in the invoice. See the Help – Metering and new connection page for further details.

Metering

Please select appropriate options:

Please enter your meter reading below

Serial number
G1K00012345678

Previous meter reading date
03/01/2019

Previous meter reading
526

Current meter reading date

Current meter reading

[How to read your gas meter](#)

Gas – Submit multiple meter readings

Navigating to the page

Navigate to the Metering menu option and select the Submit multiple meter readings tab.

Submitting multiple meter reads - template

This page allows you to submit meter readings for multiple live gas agreements linked to your profile.

To do this:

1. Download the bulk meter reads upload template
(Note: this template will include all live agreements for all the gas accounts linked to your profile)
2. Open this template in excel and enter meter reading dates and meter readings in the relevant rows
3. Save and upload this file using the Select file to upload box
4. Click Upload and validate
5. Once uploaded, correct any error messages, and check your readings before selecting Submit meter readings

Metering

Please select appropriate options:

[How to read your gas meter](#)

Step one: download the '[Bulk meter readings upload template](#)'
The template is pre-populated with account numbers, agreements, MPRNs and meter serial numbers. You may need to refer to these to ensure meter readings are submitted against the correct meter.

Step two: enter the reading dates and values into the template fields.
You only need to add the current meter reading date(s) and meter reading values. Amendments to any other fields in the template will fail validation.

Step three: save the file and upload your completed file here:

Account Number	Agreement Number	Account Name	Meter Point Reference Number	Meter Serial Number	Previous Reading Date	Previous Reading	Current Reading Date	Current Reading
10234567	AG01234567	Test Account 1	1234567890	M012K012345601	28/02/2023	309505		
10234567	AG01234568	Test Account 1	12345678	M012K012345602	27/02/2023	89203		
10234568	AG01234569	Test Account 2	1234567891	1234567	27/02/2023	46012		

Gas – View meter reading history

Navigating to the page

Navigate to the Metering menu option and select the View meter reading history tab.

Meter read history table

In the table you can view a history of meter readings for the agreement selected, with the most recent reading date at the top.

To download the information in the table in a csv file, select Download.

Metering

Please select appropriate options:

[Submit meter reading](#) [Submit multiple meter readings](#) [View meter reading history](#) ✓

Reading date	Source	Meter Reading	Energy kWh	Billed Date
28/02/2023	Actual	1205622	97591	17/03/2023
31/01/2023	Actual	1196813	100800	16/02/2023
31/12/2022	Actual	1187691	137076	17/01/2023
30/11/2022	Actual	1175318	11240	14/12/2022
31/10/2022	Actual	1174306	155	16/11/2022
30/09/2022	Actual	1174292	0	19/10/2022
31/08/2022	Actual	1174292	0	19/09/2022
31/07/2022	Actual	1174292	0	15/08/2022
30/06/2022	Actual	1174292	0	18/07/2022
31/05/2022	Actual	1174292	5520	22/06/2022

« < 1 2 3 > »

Meter point reference number
1234567891

Annual quantity (AQ)
412695

Meter serial number(s)
M123A0012345A1

How to read your gas meter

[Download](#) 📄

Gas – Invoicing

Navigating to the invoicing page

To view invoices and credit notes, select the Invoicing menu option.

You can select to view invoices and credit notes for the selected agreement, the selected account or for all accounts linked to your profile.

Invoices for selected agreement











To view invoices and credit notes for the selected agreement, select the For agreement tab.

Here you will see a table with your invoices and credit note information.

Click the download icon to download a PDF of the invoice.

Invoicing

Please select appropriate options:

Invoices			
Date issued	Invoice number	Amount	Download
17/02/2023	INV01234567	£414.38	
17/01/2023	INV01234568	£353.44	
14/12/2022	INV01234569	£377.61	
16/11/2022	INV01234561	£449.99	
18/10/2022	INV01234562	£441.12	
30/09/2022	CR01234567	-£163.37 CR	
16/09/2022	INV01234563	£163.37	
15/08/2022	INV01234564	£165.29	
15/07/2022	INV01234565	£160.53	
16/06/2022	INV01234566	£219.90	

« < 1 2 3 4 > »

Invoices for selected account


To download invoices for all agreements associated with the selected account, select the For account tab.


Here you can select one of the options available.
The results will download as PDFs into a zip folder.

Please select appropriate options:

For all accounts For account For agreement

You can download all your site invoices for last month or for the last year below. Alternatively, choose a date range within a year to download invoices for.

Download most recent month's invoices 

Download last 12 months' invoices 

Choose custom date

Invoices for all accounts


To download invoices for all accounts and agreements linked to your profile, select the For all accounts tab.

Here you can select one of the options available.
These will download as PDFs into a zip folder.

Please select appropriate options:

For all accounts For account For agreement

Download latest invoices for all accounts and sites. Alternatively, choose a date range within 31 days to download invoices for.

Download latest invoices 

Choose custom date

Gas – Balance

You can view a summary of the total balance and overdue balance for the selected account on the homepage dashboard.

Navigating to the balance page

Select View balance information button on the gas dashboard or select the Balance menu option.






Here you will see a table showing details of all outstanding invoices and credit notes contributing to the account balance.

- You can download the invoice or credit note PDFs by selecting the the icons in the Download column.
- You can download this table as an excel file using to Download .xlsx button.
- You can download a balance statement using the Download .PDF button.
- To set up a direct debit, you can download a direct debit mandate form using the Download DD Mandate button. This form should be submitted to enquiries@sefe-energy.com.

Balance

The balance information for the above account is shown below.

Total balance: **£3,176.77 Debit** ⓘ Overdue balance: **£0.00** ⓘ [Download DD Mandate](#) ⬇

Document date	Agreement	Document number	Download	Due date	Debit (£)	Credit (£)	Balance (£)
18/01/2024	AG01234567	INV00000001		28/01/2024	4,354.86	0.00	-3,176.77
18/01/2024	AG01234567	INV00000002		28/01/2024	3,218.38	0.00	1,178.09
18/01/2024	AG01234567	INV00000003		28/01/2024	2,142.59	0.00	4,396.47
18/01/2024	AG01234567	INV00000002		28/01/2024	3,812.49	0.00	6,539.06
18/01/2024	AG01234567	INV00000005		28/01/2024	2,949.08	0.00	10,351.55

This information is accurate as of 21/01/2024. Please note that payments (credits) will not appear on the transaction list above but will be reflected in the total balance and can take up to five working days to appear.

[Download .PDF](#) ⬇ [Download .xlsx](#) ⬇

Gas – Billing reports

Navigating to the billing reports page

To download billing reports, navigate to the Reporting menu option and select Billing reports in the dropdown.

You can select to download billing reports for the selected account or for all accounts linked to your profile.

Downloading the reports

1. Select a date range
2. You can configure which fields you want in the report by using the arrows to move fields across from the Available report data box into the Selected report data box
 - The > and < buttons move one field at a time
 - The >> and << buttons move all fields at once
 - You can select the ↑ and ↓ arrows next to the Selected report data box to change the order of the fields
3. Select Download. Your report will download as a csv file

Copy data selection – Previous reports log (for account only)

To copy the data selection from a previous report you have downloaded, scroll down to the Previous reports log.

Select Copy data selection next to the report you wish to copy. This will populate the Selected report data box above to match the fields of the previous report.

Billing

For all accounts For account

You can configure your report by selecting the data you wish to see from the list below.

Invoice date from

Invoice date to

Available report data ?

- Invoice Type
- Site Ref Number
- Invoice Date
- Meter Point
- Correction Factor
- Calorific Value
- Gas Cost
- Standing Charge
- SC VAT
- Commercial VAT Content

>

>>

<

<<

Selected report data ?

- Account Number
- Invoice Number
- Consolidated Invoice Number
- Energy
- Unit Price

↑

↓

Please select the data you want to see in your report from the list above and use the arrows to move the data to the right. Your report will be created from the data you select and move to the right box. You can edit the order of the data selected by using the arrows to the right. Please note the report covers all sites within an account.

[Download](#) ⬇

Previous reports log

If you frequently use the same data fields on your reports, you can save time by copying the data selection used on previous reports. To do this simply find the report you wish to copy from the list below and click on 'Copy data selection'. This will copy the data fields from that report and put them on the 'Selected report data' box above. To get your new report simply click on 'Download report'. If you do not wish to keep a record of the data selection from previous reports, simply click 'Delete'.

Date report generated	Invoice date from	Invoice date to	
25/01/2023 11:18	01/12/2022	25/01/2023	Copy Data Selection 📄 Delete ✖

Gas – Invoice consumption reports

Navigating to the invoice consumption reports page

Navigate to the Reporting menu option and select Consumption and cost reports in the dropdown. Then select the Consumption reports option.

You can select to download consumption reports for the selected agreement, account or for all accounts linked to your profile.

Downloading the reports

1. Select report date from and report date to (within a 12-month period)
2. Select Download – your report will download as a csv file

Consumption and cost reports

Please select appropriate options:

Invoice consumption reports Daily consumption reports Energy cost reports Cost of gas reports AMR and smart metering

For all accounts For account For agreement

View and download consumption reports for the selected agreement by choosing a date range below. The date range cannot exceed 12 months. The reports will be downloaded as CSV files.

Report date from Report date to

Gas – Daily consumption reports

Navigating to the daily consumption reports page

Navigate to the Reporting menu option and select Consumption and cost reports in the dropdown. Then select the Daily consumption reports option.

Downloading the reports

Select the Download report button to generate a report for the selected agreement. Consumption is provided in kWh.

The report will download as a csv file


Consumption and cost reports

Please select appropriate options:

[Invoice consumption reports](#) [Daily consumption reports](#) [Energy cost reports](#) [Cost of gas reports](#) [AMR and smart metering](#)

Download a daily consumption report for the selected agreement. Consumption is provided in kWh
The report will be downloaded as a .CSV file.

ⓘ Invoicing and invoicing correction may result in amended consumption data for the current month.

[Download report](#) 

Gas – Energy cost reports

Navigating to the energy cost reports page

Navigate to the Reporting menu option and select Consumption and cost reports in the dropdown. Then select the Energy cost reports option.

You can select to download energy cost reports for the selected agreement or account.

Downloading the reports

1. Select report date from and report date to
2. Select Download. The report will download as a csv file

Consumption and cost reports

Please select appropriate options:

View and download energy cost reports for the selected agreement by choosing a date range below. The reports will be downloaded as CSV files.

Report date from Report date to

Gas – Cost of gas reports

Given you have a gas basket linked to your profile, you can download cost of gas reports.

Navigating to the cost of gas reports page

Navigate to the Reporting menu option and select Consumption and cost reports in the dropdown. Then select the Cost of gas reports option.

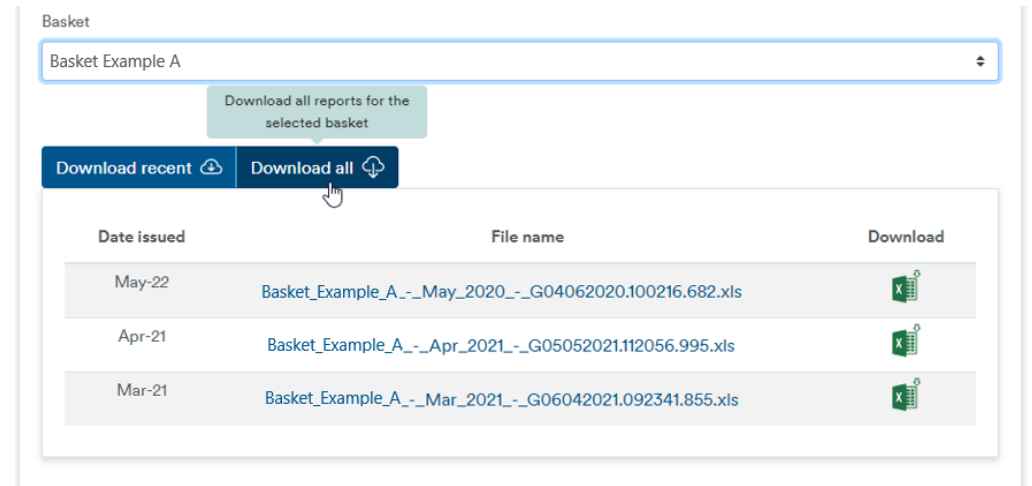
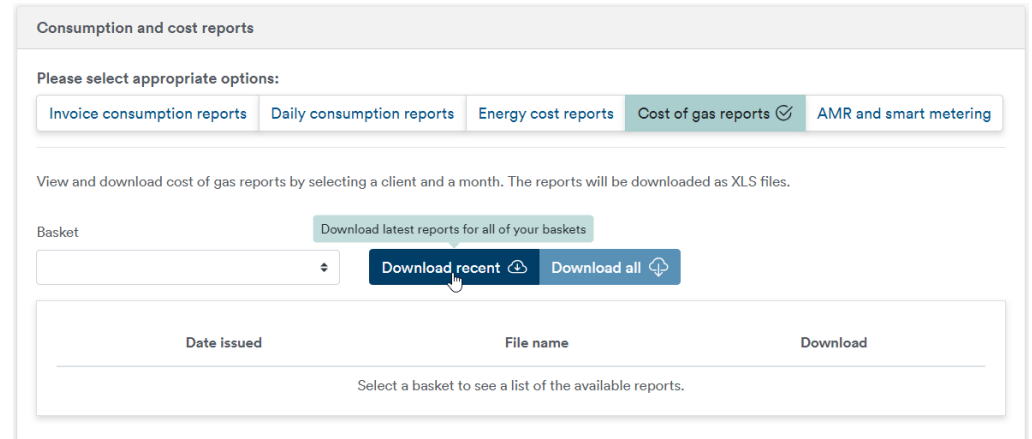
Downloading the reports




To download the latest reports for all your baskets, select Download recent.

To download reports for a particular basket, use the basket dropdown to select a basket.

Here you can see all cost of gas reports for that basket:

- You can download an individual report by selecting the download icon at the end of the row.
- You can download all reports for this basket by selecting Download all.



Date issued	File name	Download
May-22	Basket_Example_A_-_May_2020_-_G04062020.100216.682.xls	
Apr-21	Basket_Example_A_-_Apr_2021_-_G05052021.112056.995.xls	
Mar-21	Basket_Example_A_-_Mar_2021_-_G06042021.092341.855.xls	

Gas – AMR and smart metering

Navigating to the AMR and smart metering page

Navigate to the Reporting menu option and select Consumption and cost reports in the dropdown. Then select the AMR and smart metering option.

You can select to download AMR and reports for the selected agreement, account or for all accounts linked to your profile.

For agreement – Consumption graph

Given you have a smart meter or an AMR device, selecting For agreement will generate a monthly view graph of the selected meter's consumption for the contract period.

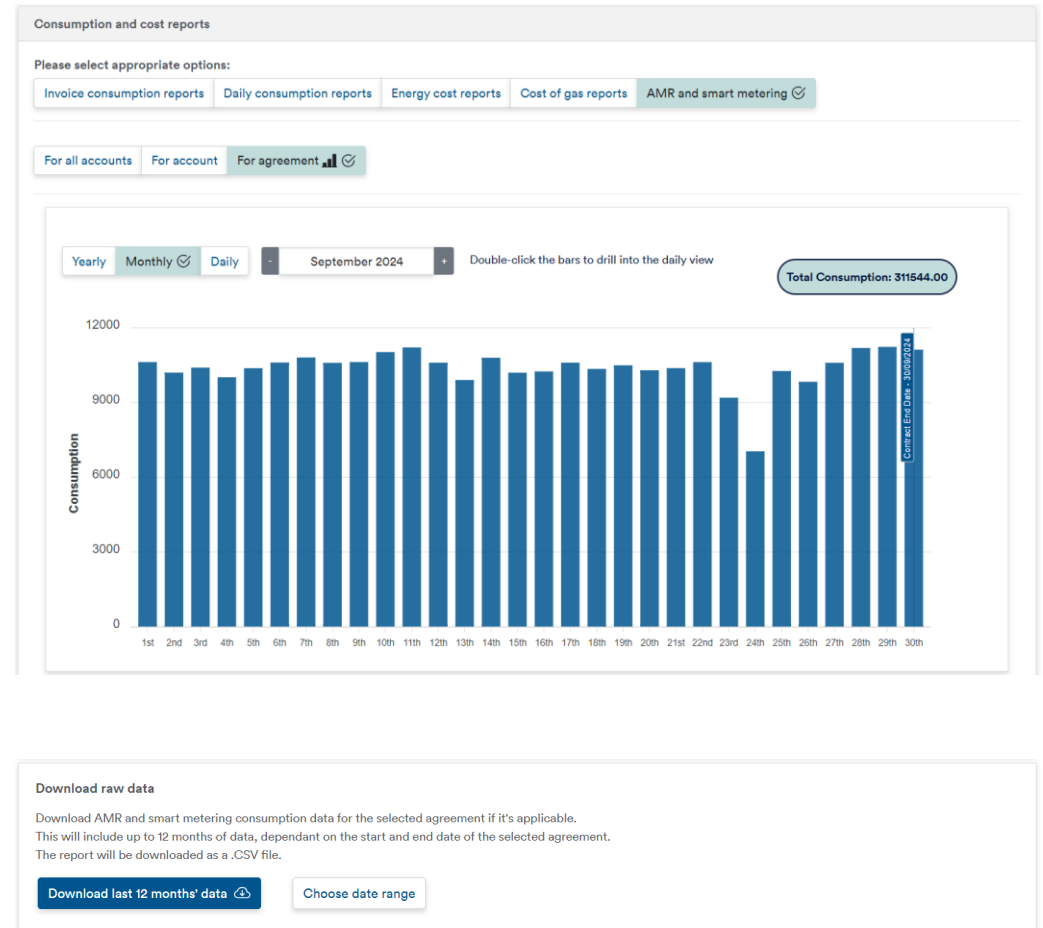
You can navigate between Yearly, Monthly and Daily views. In addition, you can double click on bars to drill through from Yearly to Monthly to Daily views.

The graphs and reports display data sent directly from the meter. The units depend on the unit of your meter which you can find on your invoices (e.g. m³, ft³).

For agreement – report download

Select Download last 12 months' data to download a csv file with up to 12 months of AMR and smart metering data for the selected agreement.

Alternatively, select Choose date range to specify a start and end date for the report download.



For account – report download

Select the for account option.

Input Report date from and Report date to, then select download.

This will download a single csv file for agreements within the selected account with AMR/Smart metering consumption data.

For all accounts – report download

Select the for all accounts option.

Input Report date from and Report date to, then select download.

This will download a single csv file for agreements linked to your profile with AMR/Smart metering consumption data.

Consumption and cost reports

Please select appropriate options:

[Invoice consumption reports](#) [Daily consumption reports](#) [Energy cost reports](#) [Cost of gas reports](#) [AMR and smart metering](#) ✓

[For all accounts](#) [For account](#) ✓ [For agreement](#) 📊

Download AMR and smart metering data for all agreements within the selected account. The date range cannot exceed the last 12 months. The report will be downloaded as a .CSV file.

Report date from

Report date to

[Download](#) 📄

Consumption and cost reports

Please select appropriate options:

[Invoice consumption reports](#) [Daily consumption reports](#) [Energy cost reports](#) [Cost of gas reports](#) [AMR and smart metering](#) ✓

[For all accounts](#) [For account](#) [For agreement](#) 📊

Download AMR and smart metering data for agreements within all accounts. The date range cannot exceed the last 12 months. The reports will be downloaded as .CSV files.

Report date from

Report date to

[Download](#) 📄

Gas – Manage billing details

Navigating to the billing details page

Navigate to the Manage menu option and select Manage site details in the dropdown. Then select the Billing details option.

Here you can view the existing billing details for the selected agreement.

To update your billing details, fill in the form fields and click Send.

Manage site details

Please select appropriate options:

Billing details Site address Emergency contact

Use the form below to request an update or change your billing details for the selected site.

* indicates a required field.

Contact name *	<input type="text"/>
Email address *	<input type="text"/>
Company name *	<input type="text" value="COMPANY NAME EXAMPLE LIMITED"/>
Address line 1 *	<input type="text" value="COMPANY NAME EXAMPLE LIMITED"/>
Address line 2	<input type="text" value="ADDRESS LINE 2"/>
Address line 3	<input type="text" value="ADDRESS LINE 3"/>
Address line 4	<input type="text"/>
Postcode *	<input type="text" value="AB1 2CD"/>
Telephone *	<input type="text" value="0123 456 7891"/>

Gas – Manage site address

Navigating to the site address page

Navigate to the Manage menu option and select Manage site details in the dropdown. Then select the Site address option.

Here you can view the existing site address for the selected agreement.

To update your site address, fill in the form fields and click Send.

Manage site details

Please select appropriate options:

If you have provided us with emergency contact details for this site we will have this information on file so please contact us to check or amend these details. Alternatively, you can supply new emergency contact details by completing the form below. We will replace any details we have on file with those supplied via this form.

* indicates a required field.

Contact name *

Email address *

Company name *

Address line 1 *

Address line 2

Town

Postcode *

Telephone *

Gas – Manage emergency contact

Navigating to the emergency contact page

Navigate to the Manage menu option and select Manage site details in the dropdown. Then select the Emergency contact option.

Here you can provide us with emergency contact details for the selected agreement.

To update your emergency contact details, fill in the form fields and click Send.

Manage site details

Please select appropriate options:

[Billing details](#) [Site address](#) [Emergency contact](#)

Use the form below to update your site address. Please note, this is the address where the meter is located.

* indicates a required field.

Contact name *	<input type="text"/>
Email address *	<input type="text"/>
Company name *	<input type="text" value="COMPANY NAME EXAMPLE LIMITED"/>
Address line 1 *	<input type="text" value="COMPANY NAME EXAMPLE LIMITED"/>
Address line 2	<input type="text" value="ADDRESS LINE 2"/>
Address line 3	<input type="text" value="ADDRESS LINE 3"/>
Address line 4	<input type="text"/>
Postcode *	<input type="text" value="AB1 2CD"/>
Telephone *	<input type="text" value="0123 456 7891"/>

Power – Metering

Given you have selected a power account with a non-half-hourly meter type in the selection tool, you can submit meter readings using the portal.

Navigating to the metering page

On the home page, select the Submit a meter reading button. Alternatively, select the Metering menu option. Then select the Submit meter reading option.

Submitting a meter reading

For each meter serial number and register:

1. Enter a current meter reading date (note: the date must be the same for all registers under the same meter serial number)
2. Enter the current meter reading
3. Click Send

You will then see a confirmation that the meter read has been sent to the customer services team.

Note: To ensure you have entered the meter readings correctly, click the How to read your electricity meter link.

Metering

Please enter your meter reading below

Please note that readings need to be submitted between 25th and 5th of each month to be used in next month's invoice

MPAN: 12345678910

Meter serial number: Z12ABC345DE

Register	Previous Reading Date	Previous Meter Reading	Current Reading Date	Current Meter Reading
01	30/03/2022	24186	<input type="text" value="dd/mm/yyyy"/>	<input type="text"/>
02	30/03/2022	88123	<input type="text" value="dd/mm/yyyy"/>	<input type="text"/>

[Send](#)

Metering

Thank you, meter reading sent successfully.

Your meter reading has been sent to our Customer Service team.

Meter Serial Number	Register ID	Current Reading Date	Current Meter Reading
Z12ABC345DE	01	02/10/2024	123456
Z12ABC345DE	02	02/10/2024	123456

Please allow up to two business days for your meter reading to be processed. If we can be of any assistance, please contact us on 0161 837 3395.

Thank you.

The SEFE Energy team.

[Return to Meter Readings](#)

Power – Invoices

Given you have selected a power account in the selection tool, you can view power invoices.

Navigating to the power invoices page

On the home page, select the View invoices button. Alternatively, select the Invoicing menu option.

View invoices for account

Select the For account option.

Here you will see a summary of invoices for the account selected. Click the Download icon to download your PDF invoice.

View invoices for group account







Select the For group account option. Here you will see a summary of invoices for accounts within the selected group account. Click on the respective icons to download:

- Group summary (PDF) – a multi-page document with a cover sheet, list of each site and a backing page per site with bill calculations.
- Group statement (PDF) – similar to the group summary without the backing page per site.
- Detailed group statement (Excel) – a breakdown of the invoices.

Invoicing

Please select appropriate options:



For group account For account

Group Invoices					
Date issued	Group Summary Number	Amount	Group Summary	Group Statement	Detailed Group Statement
14/12/2022	345678	£162.82			
23/11/2022	567890	£358.38			

Invoicing

Please select appropriate options:

For group account For account

Invoices			
Date issued	Site Invoice number	Amount	Download
14/12/2022	123456	£91.49	
23/11/2022	234567	£290.35	

Power – Daily consumption reports

Given you have selected a power account with a half-hourly meter type in the selection tool, you can access daily consumption reports.

Navigating to the Daily consumption report page

On the home page, select the Consumption report button. Alternatively, select the Reporting menu option and click Consumption and cost reports in the dropdown.

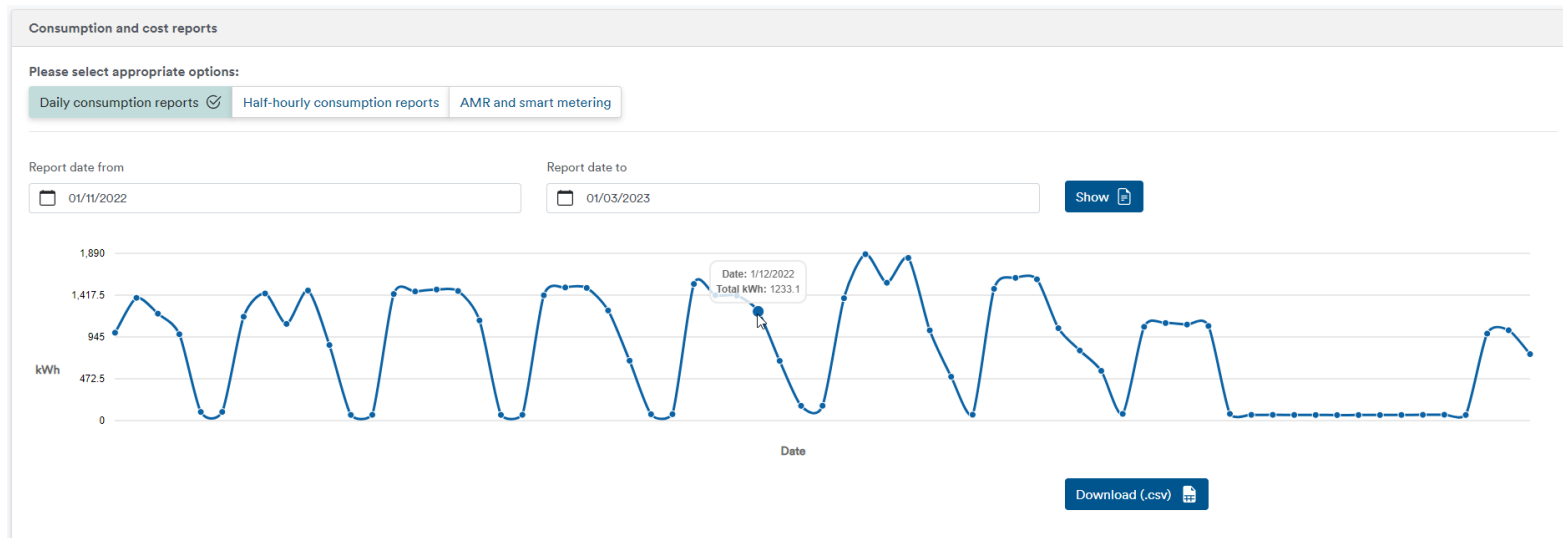
Select the Daily consumption reports option.

Viewing Daily consumption report

1. Enter a report date from and report date to
2. Select Show

Here you will see a graph showing the total kWh for the selected period. Hovering over points on the graph will show the details for each day.

3. Select Download to download this report as a csv file.



Power – Half-hourly consumption reports

Given you have selected a power account with a half-hourly meter type in the selection tool, you can access half-hourly consumption reports.

Navigating to the Half-hourly consumption report page

On the home page, select the Consumption report button. Alternatively, select the Reporting menu option and click Consumption and cost reports in the dropdown.

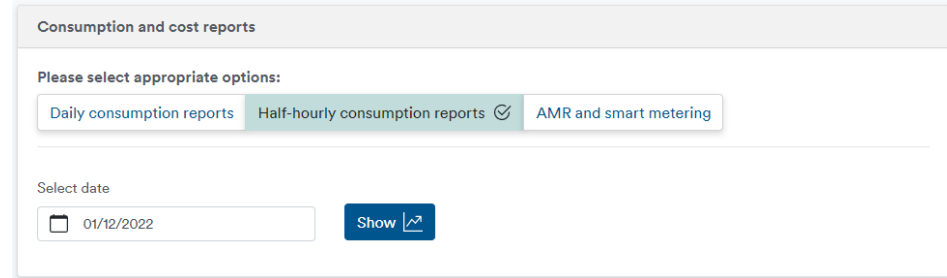
Select the Half-hourly consumption reports option.

Viewing Half-hourly consumption report

1. Enter a date
2. Select Show

Here you will see a graph showing the total kWh for every half-hour for the selected date. Hovering over points on the graph will show the details for each day.

3. To view data for another day, enter another date in the box to the right of the selected date
4. Select Show additional data – this will add another line in the graph, allowing you to compare data consumption per day.
Note: you can view up to 5 dates worth of data at one time.
5. To view data in a csv file, click Download



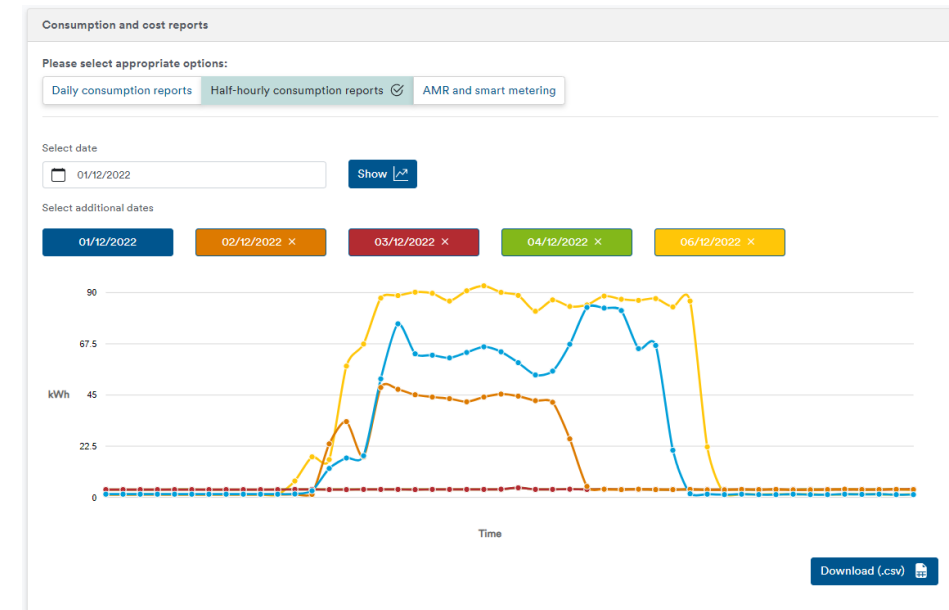
Consumption and cost reports

Please select appropriate options:

Daily consumption reports Half-hourly consumption reports AMR and smart metering

Select date

01/12/2022 Show



Power – AMR and smart metering

Navigating to the AMR and smart metering page

Navigate to the Reporting menu option and select Consumption and cost reports in the dropdown. Then select the AMR and smart metering option.

Consumption graph

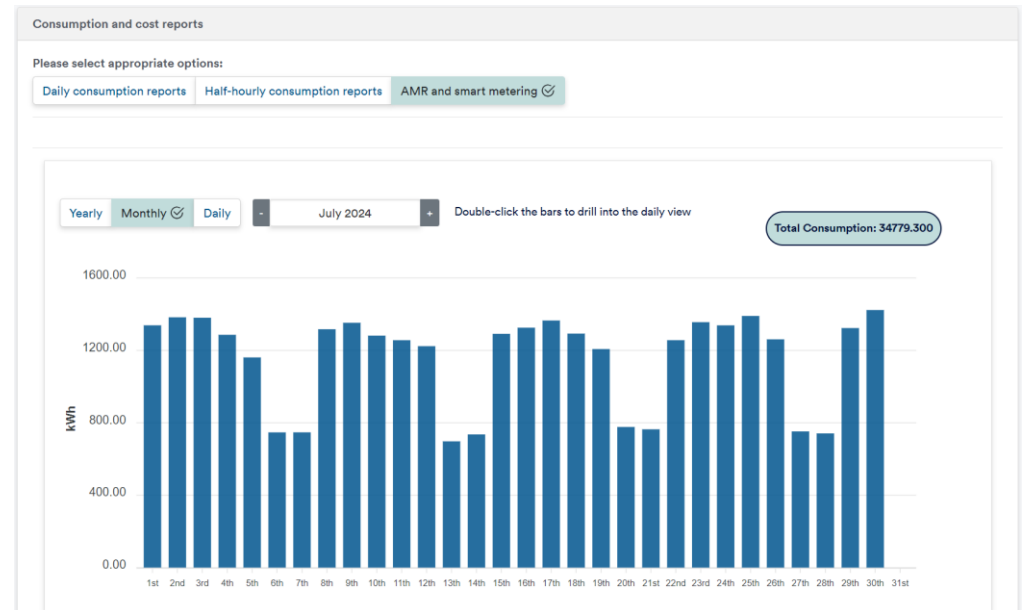
Given you have a smart meter or an AMR device, selecting AMR and smart metering will generate a monthly view graph of the selected meter's consumption for the contract period.

You can navigate between Yearly, Monthly and Daily views. In addition, you can double click on bars to drill through from Yearly to Monthly to Daily views.

Downloading the reports

Below the consumption graph, select Download last 12 months' data to download a csv file with up to 12 months of AMR and smart metering data for the selected agreement.

Select Choose date range to specify a start and end date for the report download.



Download raw data

Download AMR and smart metering consumption data for the selected agreement if it's applicable. This will include up to 12 months of data, dependant on the start and end date of the selected agreement. The report will be downloaded as a .CSV file.

[Download last 12 months' data](#)

[Choose date range](#)

Manage users – Add new user

You can add another user so they can manage your gas and/or power accounts using the add new user page.

Note: For security purposes, the manage users functionality is only available to users who were created by the SEFE team. If your profile was added by a colleague, you are unable to add or manage users.

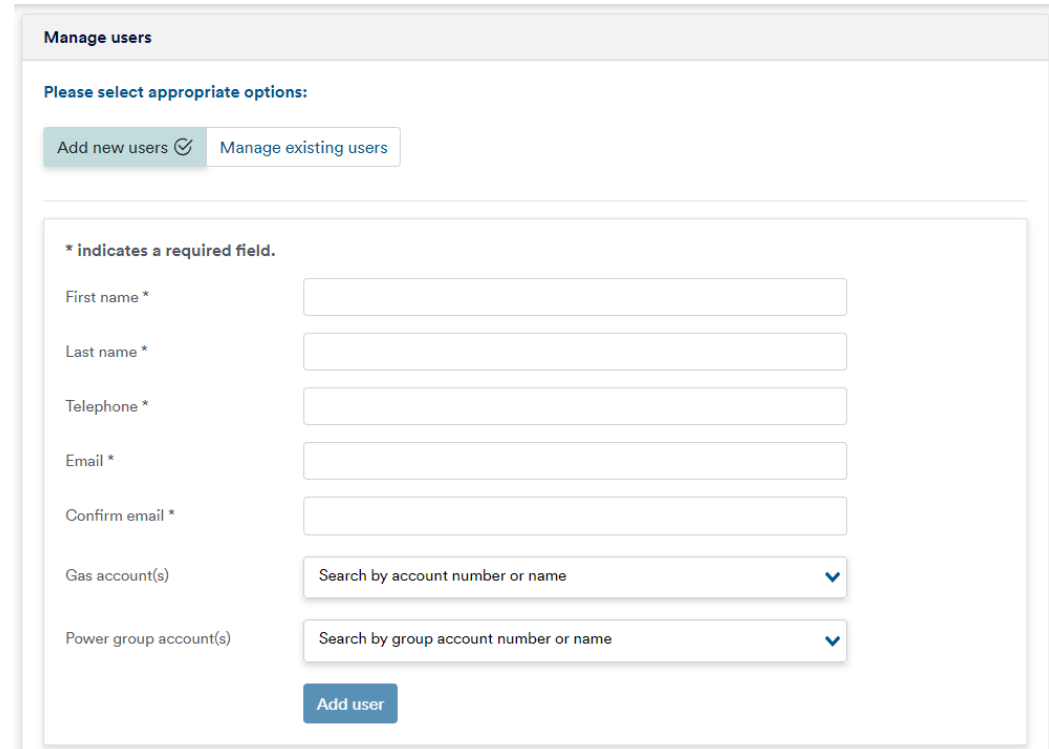
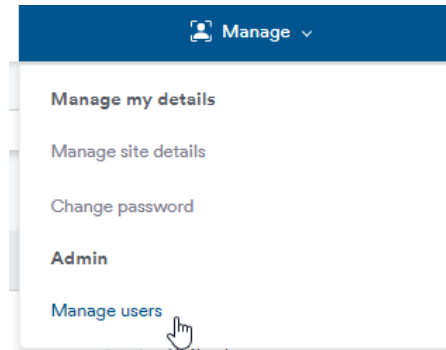
Navigating to the Add new user page

Navigate to the Manage menu option and select Manage users in the dropdown.

Select Add new user.

Adding a new user

1. Fill in the new user's details.
2. Use the gas account and/or power group account dropdowns to select the accounts you want them to have access to.
3. To delete an account from the selection, click the checkbox then select Remove selected accounts.
4. When you are happy with your account selection, select Add user.
5. The new user will receive an email prompting them to log in.

A screenshot of the 'Manage users' page. At the top, there is a header 'Manage users'. Below it, a prompt says 'Please select appropriate options:'. There are two buttons: 'Add new users' (which is selected and has a checkmark) and 'Manage existing users'. Below this, there is a form with several fields. A note says '* indicates a required field.' The fields are: 'First name *', 'Last name *', 'Telephone *', 'Email *', 'Confirm email *', 'Gas account(s)' (with a dropdown menu showing 'Search by account number or name'), and 'Power group account(s)' (with a dropdown menu showing 'Search by group account number or name'). At the bottom right of the form is a blue 'Add user' button.

Manage users – Manage existing users

Navigating to the Manage existing users page

Navigate to the Manage menu option and select Manage users in the dropdown.

Select Manage existing users.

Select users

You can select a user to manage by looking through the list or searching for users in the search box.

Click Manage at the end of the row to manage that users profile.

Manage users details and access

- In the user details section, you can edit the users name, phone number and email (their username)
- You can lock/unlock the users profile using the tickbox
- Remember to select save users details
- Expand the Gas account(s) section to add and remove access to gas accounts
- Expand the Power group account(s) section to add and remove access to power group accounts

Manage users

Please select appropriate options:

Manage users

Please select appropriate options:

Users

Search by username, first name or last name (min 3 characters) Clear

Username	First name	Last name	Last logged in	Locked
karen@company.com	Karen	Finance	10/10/2022	<input type="checkbox"/>
Sharon@company.com	Sharon	HR	02/10/2024	<input type="checkbox"/>

« < 1 > »

User details ^

* indicates a required field.

First name *

Last name *

Telephone *

Email *

Lock user

Gas account(s) v

Power group account(s) v

Request access to additional accounts (TPIs)

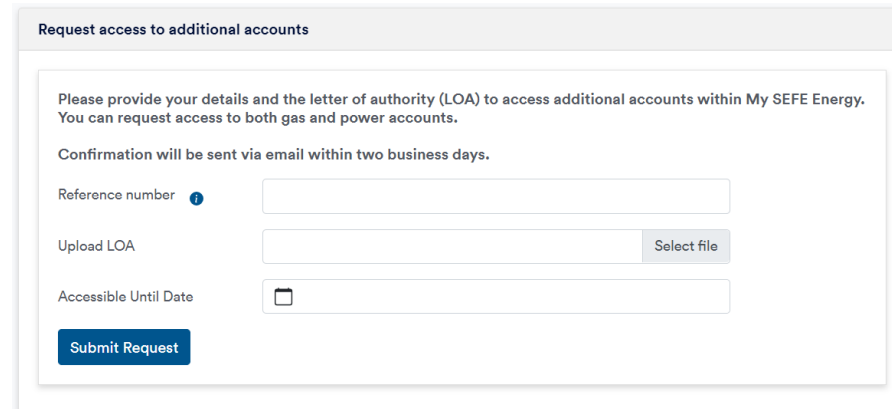
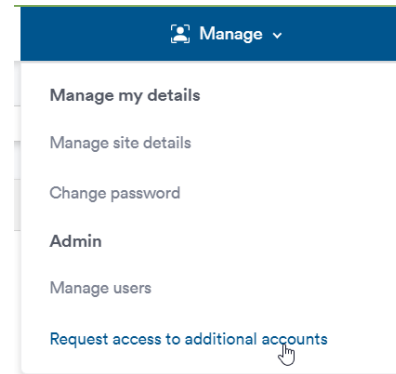
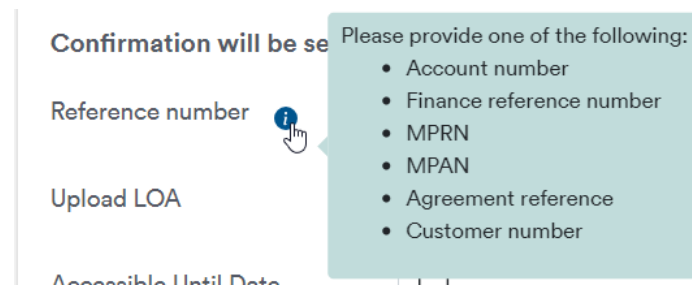
This feature is only available for TPI users.

Navigating to the page

Navigate to the Manage menu option and select Request access to additional accounts in the dropdown.

Request access form

1. Provide a Reference number (see tooltip) for the accounts you wish to access
2. Click Select file to upload a Letter of Authority (LOA) form
3. Click Accessible until date to select the date for which you are authorised to have access to the account(s)
(Note: This should match what is in the LOA document)

A screenshot of the 'Request access to additional accounts' form. The form has a title bar and a main content area. The main content area contains the following text: 'Please provide your details and the letter of authority (LOA) to access additional accounts within My SEFE Energy. You can request access to both gas and power accounts.' Below this is a sub-heading: 'Confirmation will be sent via email within two business days.' The form includes three input fields: 'Reference number' with an information icon, 'Upload LOA' with a 'Select file' button, and 'Accessible Until Date' with a calendar icon. A 'Submit Request' button is located at the bottom left of the form.

Change password

Navigating to the change password page

Navigate to the Manage menu option and select Change password in the dropdown.

Enter your current password, new password and confirm new password. Select Change password.

You will receive an email conformation to confirm your password has been changed successfully.

Forgotten password

If you have forgotten your password, on the login page select the Forgotten password tab.

Enter your email address and click Submit.

If the email you entered matches an existing username on our system, you will receive an email to reset your password.

Change password

Please complete the form below to change your password.


Current password *

New password *

Confirm new password *

[Change password](#)

[Login](#) [Register](#) [Forgotten Password](#)



Enter your email address and we will email you instructions on how to reset your password.

[Submit](#)