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14 May 2025

New Portal:

Frequently asked questions

portal.zenergi.co.uk

→ Portal access and user management

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→ Invoices and billing

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Portal access and user management

- **How do I get into the new Portal?**

  - You'll need to register a new account at https://portal.zenergi.co.uk/ using the same email address that you used for the old Portal. Your previous password or any other email will not work. If you wish to use a different login email address or you've never used any of our Portals before, please send your request to askus@zenergi.co.uk or your Customer Success Manager, and we will set you up.

- **Can we have multiple login accounts for the same organisation?**

  - Yes, there's no limit to the number of users we can set up for your organisation. Your company's decision maker will just need to contact your Customer Success Manager or email askus@zenergi.co.uk, providing the email addresses to be added, along with the required site access for each user.

- **We have a Group of companies – can views be restricted so users don't see the whole Group data?**

  - Yes, we can restrict user access by site. If you'd like to make any changes, please have your decision maker get in touch with your Customer Success Manager or contact askus@zenergi.co.uk.

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Site and meter visibility

- **Why can't we see all our sites or meters?**

  - This may be because you don't have the relevant permissions to see all sites and meters. If you believe you should have access to more sites, please have your decision maker contact your Customer Success Manager, or askus@zenergi.co.uk, with the updated permissions and we can apply them for you.

- **There are no electricity meters on my meter list – is this because it is a HH meter?**

  - The meter list represents meters that require regular meter reading submissions. HH meters operate in a different way - automatically logging consumption every half-hour, and so do not require meter readings. To avoid confusion, these are excluded from this list.

- **Will we be able to access our half-hourly data from HH meters on the new Portal?**

  - Yes, provided Zenergi look after your half-hourly data collection, HH data can be accessed via the Report library. Once you have selected the period you are interested in, the CSV export will be presented in the usual way.

- **I don't have any HH data in my half-hourly reports, why is that?**

  - Generally, only customers who subscribe to our half-hourly data collection service will see data here. If you believe you are missing data, or would be interested in learning more about this service please contact your Customer Success Manager or askus@zenergi.co.uk.

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Meter readings

- **If our meter readings are done automatically, do we still need to submit them?**

  - If you have a half-hourly electricity meter, it won't appear in the meter reads section of the Portal, as billing is based on actual consumption data rather than manual reads. If you have an AMR meter, we still recommend submitting regular meter readings, as these meters can sometimes be inaccurate. Providing readings can help ensure accurate billing and assist in resolving any issues with your supplier.

- **Is it better to submit the meter readings via the Portal rather than direct to the supplier?**

  - We recommend submitting your meter readings through our Portal rather than directly to your supplier. This ensures we have all the necessary information for accurate bill validation and helps us resolve any billing discrepancies with your supplier more efficiently.

- **Should the Portal be down, where should we send meter readings?**

  - We do not anticipate any downtime with the Portal. However, in the unlikely event of a technical issue, you should email your meter readings to askus@zenergi.co.uk.

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Invoices and billing

- **Will we still receive invoices by email notification, or should we download them from the Portal?**

  - Yes, you will continue to receive your invoices from the validation team by email as usual. Additionally, bills and billing data will be available on the Portal, where you can access copies or download the data in Excel format if you prefer to process your billing that way, instead of using PDFs.

- **Have historic invoices been added and how long will this billing data be kept on the Portal before it is archived?**

  - Yes, you'll have access to all historic invoices. All billing data will remain available to you on the Portal for the duration of your contract with Zenergi.

- **Will we be able to download water invoices as well as gas and electricity?**

  - Yes, water invoices are also available to download.

- **Are these bills only those that have been approved?**

  - No, any invoices that have been sent to you, regardless of their bill validation status, will be available to view and download on the Portal.

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Invoices and billing

- **Can we see an account breakdown or statement of what's been paid and what hasn't?**

  - No, Zenergi does not hold any records of payments, since all payments are made directly by you to your supplier. If you require a statement of account, we can assist in requesting one from your supplier on your behalf.

- **How do we edit the reporting period in bill validation insights?**

  - There is a filter panel on the right-hand side of the report where you can define the 'tax-point date'.

- **How far back does the half-hourly data go?**

  - The HH data reports go back 24 months, if your first DC/DA contract with Zenergi started after that you will see data from the start of your contract.

- **Can we extract an Excel of the specifications of cost allocation if there are multiple locations listed on the invoice?**

  - The Billing insight report gives you a breakdown of invoices, costs, and consumption for each meter. There's also a 'customer reference' column available. If you provide us with any cost center or cost analysis codes, we can add them to the report in the customer reference field.

- **What does it mean when a consumption check fails, and what do we need to do?**

  - If your invoice fails all three checks – against the previous month; the same period last year; and your contract forecast – our Bill Validation Specialists will investigate. You'll receive an email with your invoice, and we'll follow up should further action be needed.

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Reports and data export

- **Can the list of bills be exported to Excel?**

  - You can't export the list of bills from the utility bills page, however, if you open the Billing insight report, all invoice data will be available which you can then export to Excel. All electricity, gas and water bills can be exported from this report.

- **Why do the reports I run return blank?**

  - Billing, consumption and cost data will only be available if you use our bill validation service. HH data will only be available if you have a live DC/DA contract with Zenergi. If data isn't showing that you expect to see, please reach out to your Customer Success Manager, or email askus@zenergi.co.uk and the team will be able to investigate.

- **With the historical cost comparison, when will we be able to view 2025 figures to date?**

  - This report does include the data from your latest validated invoices, if you are not seeing 2025 data, try switching your date filter from 'Last *x* years' to 'Last x months', since the 'Last' option within the relative filter does not include the current period.

- **What is the difference between 'bill end date' and 'apportioned' on the cost and consumption reports?**

  - "Bill end date" means that all costs and consumption on an invoice are assigned to the month in which the bill ends, even if the billing period spans multiple months. If you choose "apportioned," the report will distribute the cost and consumption across all the months covered by the invoice, providing a more accurate reflection of when the energy was actually used.

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Reports and data export

- **Can we see all our sites on the same graph? Can we also separate them out and drill down?**

  - You'll only be able to view reports for the sites you have access to. Filtering options within the Portal allow you to separate and drill down into individual sites you have access to. If you require access to additional sites, please ask your decision maker to contact your Customer Success Manager or email askus@zenergi.co.uk to update your permissions.

- **What should we do if we spot unusual trends in our consumption data?**

  - You are invited to raise this with your Customer Success Manager or email askus@zenergi.co.uk so we can investigate and discuss possible causes and ways to troubleshoot.

- **The switch view does not seem to work? The error message is "no report views found. Save your current view to easily load it later."**

  - To use the switch view functionality, you'll first need to save a report view. Start by applying the relevant filters within any report and select 'Save as new view'. This view will then be saved for that specific report, allowing you to quickly and easily return to it whenever needed.

- **Where can I get information on future budgets and forecasts?**

  - Either your Customer Success Manager or the Customer Support team will be able to help you calculate this, working with our Procurement team - should you have a contract renewal prior to the end of the budgeting window under review. The consumption and cost reports on our Portal also help with this process and we will be developing future automated reports to support this fully.

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Here to help

Contact us

askus@zenergi.co.uk

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