

Support Library

User resources

February 2021



User Guide

Overview and Navigation

Dashboard

Facilities

Payables

Budgets

Market

Reports

Settings

Quick Guides



Overview and Navigation

There are six menu items of the portal which can be accessed by clicking on the menu bar at the top of the screen. Each of these sections are explained in detail in this documentation:

- Dashboard
- Facilities
- Payables
- Market
- Report
- Settings



You can search for specific facilities in the search bar at the top of the page. You can search by facility name, meter ID, account number, reference data or address. Searching in the portal will only return results for your company.

Dashboard

Dashboard Overview

Data Availability Status

Latest Notifications

Usage and Spend

Sites

Top 10 Usage and Spend



Dashboard Overview

The dashboard gives a high-level overview of all facilities in the portal. All the facilities available for your company is displayed on this page.



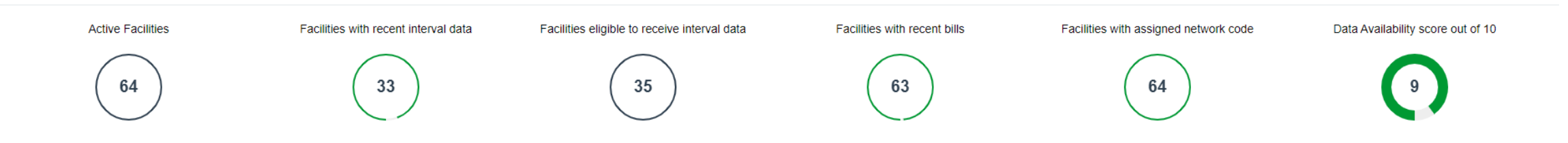
The screenshot shows a dark navigation bar with a search input field on the left containing the text "Search by facility name, meter id or address:" and a magnifying glass icon. On the right, there is a dropdown menu showing "ht_AaronBrainMotorsPtyLtd" with a downward arrow. Below the search bar, a horizontal menu contains the following items: "Dashboard" (highlighted with a red box), "Facilities" with a downward arrow, "Payables" with a downward arrow, "Market" with a downward arrow, "Reports" with a downward arrow, and "Settings". On the far right of the navigation bar, the text "Welcome channelpartn..." is displayed above a red "Logout" button with an arrow icon and a circular profile icon containing the letter "C".

Data Availability Status

The data availability status chart gives an overview of available data for all facilities in the portal, where a facility refers to each unique energy account:

- Active facilities
- Facilities with recent interval data
- Facilities eligible to receive interval data
- Facilities with recent bills
- Facilities with assigned network code
- Data availability score

Data Availability Status



Latest Notifications

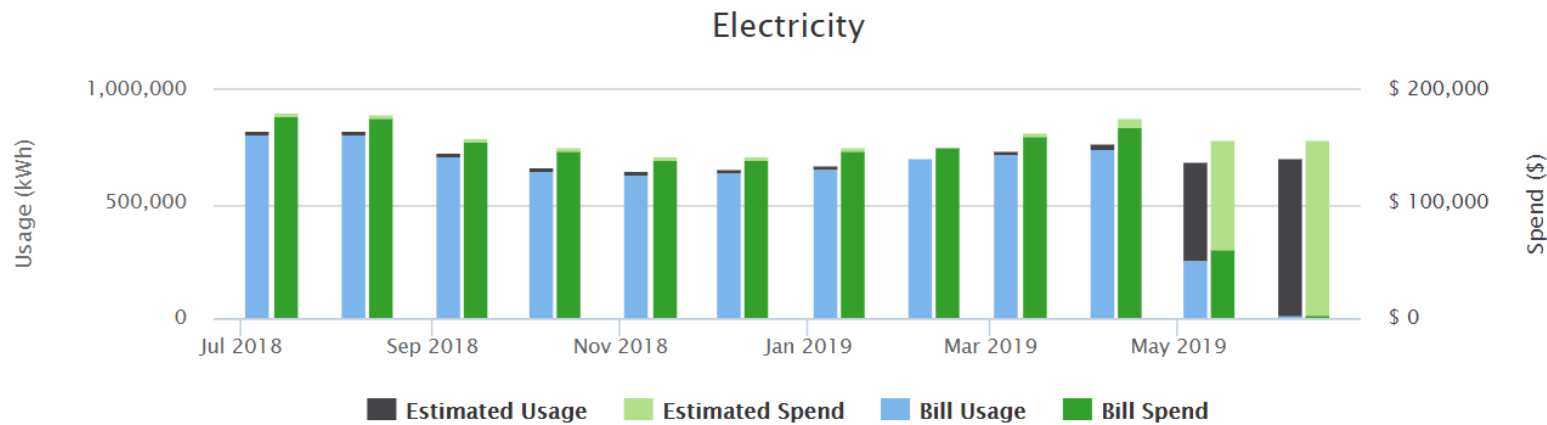
Latest Notifications displays any new notifications received.

Latest Notifications

No new notifications to display

Usage and Spend

The usage and spend chart displays twelve months of rolling data for total bill spend and usage across all facilities. You can filter each category in the chart by clicking on the key labels. You can also click on each of the highlighted headings to be navigated to the relative area for more detail.



Bills Received in last 7 days	60
New Charges	\$ 57,579
Aged Accruals	\$ 107,950
Current Month Forecast	\$ 156,771
Buyer Alert	158
Overdue Bill Notices	3

8,527,063 kWh

Total Usage

\$ 1,894,802

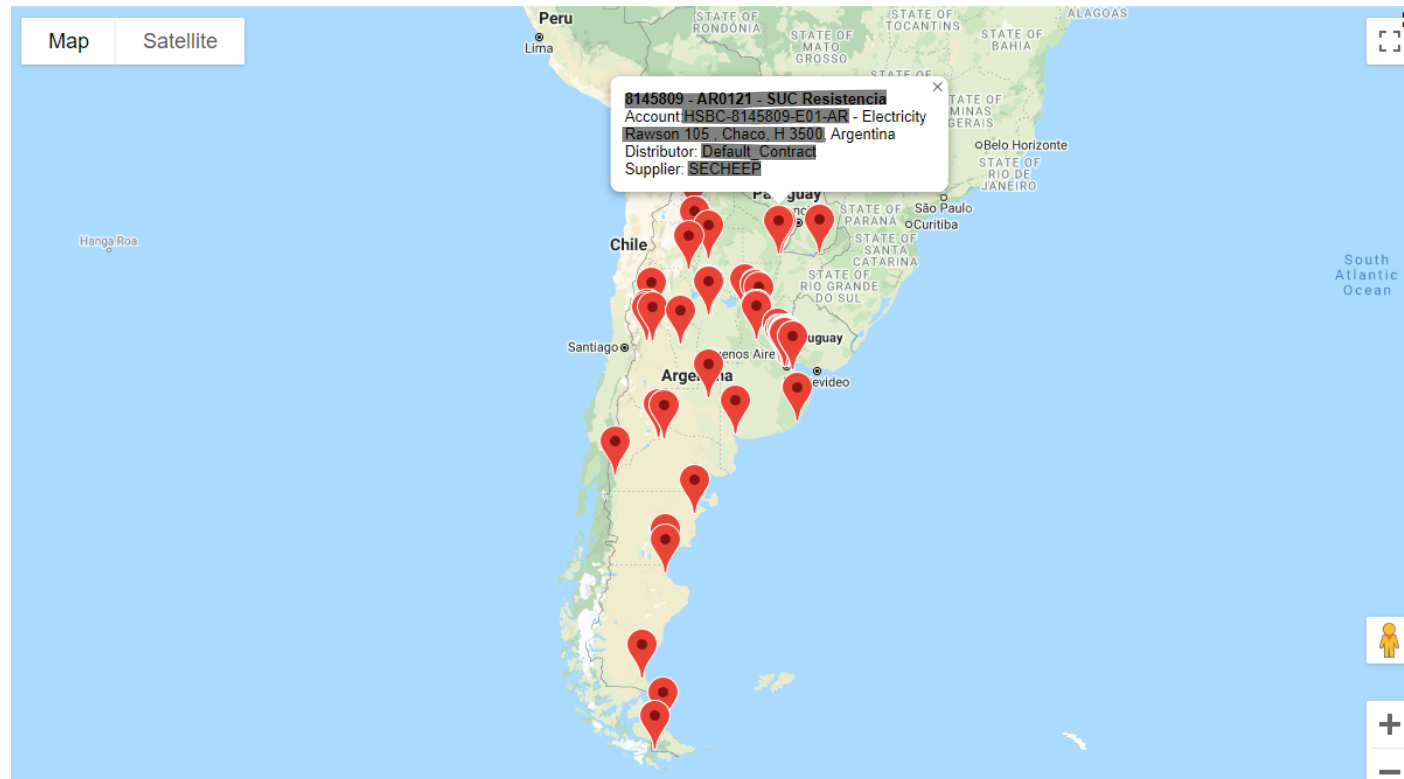
Total Spend

\$ 0

Implemented Savings to Date ⓘ

Sites

The sites map displays the location of all facilities. Clicking on a site will display site information. You can click on the site information to take you directly to the facilities menu item of the portal for that site.



Top 10 Usage and Spend

The Top 10 Usage and Spend lists out the top ten facilities for usage and spend across the portfolio. This is only displayed in the Client section of the portal. You can click on each facility name to take you to the reporting menu item of the portal for that specific site. There are three different options from the drop-down menu:

1. **Top 10 Usage and Spend** – This is the default view and shows the top 10 facilities for usage and spend.

Top 10 Usage and Spend

Top 10 Usage		Top 10 Spend	
CA [REDACTED]	308,155 kWh	CA [REDACTED]	\$ 40,766
CA [REDACTED]	258,496 kWh	CA [REDACTED]	\$ 36,042

2. **Top 10 Usage and Spend Movers** – Displays the top 10 facilities that have the biggest variance in usage and spend between last two months having complete bill data, over a period of six months.

Top 10 Usage and Spend Movers

Top 10 Usage Movers		Top 10 Spend Movers
CA [REDACTED]	4,946 kWh ↑	CA [REDACTED] \$ 2,468 ↑
CA [REDACTED]	2,459 kWh ↓	CA [REDACTED] \$ 902 ↑

3. **Top 10 Spend – Supplier/Utility and Tag** – Displays the top ten spend for suppliers and by tagged facilities.

Top 10 Spend - Supplier/Utility and Tag

Top 10 Spend - Supplier/Utility	Top 10 Spend - Tag
[REDACTED]	\$ 341,161
[REDACTED]	\$ 270,241

Facilities

Facilities Overview

Facility Summary

Bills

Account Details

Usage

Contract



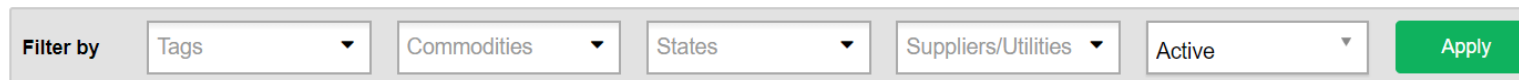
Facilities Overview

In the **Facilities** section, users are able to view and extract data related to energy sites.



You can search for a specific facility by the facility name, meter ID or address. Where additional reference data has been provided, such as site name or number, this information will also become searchable.

You can filter by tags, commodities, states, suppliers and the site status by selecting the options from the drop-down lists in the filter bar. Once you have selected the filters you want to apply, click the **Apply** button to display the filtered sites.



You can select to show invalid buys by ticking the **Show Invalid Bills** checkbox. This will display bills that have been flagged as invalid by the portal when searching bills for a specific site.

You can click on **Export** to export a list of all facilities or to download the form to add or remove a site from the portal.

Facility Summary

The search results will show all facilities based on applied filters. Each facility is displayed in a box with information about the site as well as links to bills, facility details, usage and the contract (the contract option is not displayed if there is no contract for the site).

The information about the site includes:

- **Facilities** – The address, commodity, tags and identifier of the facility.
- **Usage** – Energy usage at the facility per year.
- **Spend** – Spend at the facility per year.
- **Effective Rate** – The cost of a unit of supply in cents including all charges (energy and supply to property).
- **Contracts** – Displays the current contract supplier and expiry date if applicable.
- **Meter Data Contracts** – Displays the current meter data contract if applicable.
- **Last Billed By** – Displays the supplier who last billed the facility.
- **Actions** – Allows you to click on bills, facility details, usage and contract at the facility. Please see following sections for more details on the actions.



Bills

Click on the Bills action to display all bills for the facility:

Accounts	Usage	Spend	Effective Rate	Supplier Account Number	Utility Account Number	Last Billed By	Action
<div style="background-color: #ccc; width: 100px; height: 20px; margin-bottom: 5px;"></div> <div style="background-color: #ccc; width: 100px; height: 20px; margin-bottom: 5px;"></div> <p>Katy, TX 77449 US</p> <p>📍 Electricity</p> <p>Identifier: <div style="background-color: #ccc; width: 100px; height: 15px; display: inline-block;"></div></p> <p>Cost Code: <div style="background-color: #ccc; width: 100px; height: 15px; display: inline-block;"></div></p> <div style="background-color: #ccc; width: 100px; height: 15px; display: inline-block; margin-top: 5px;"></div>	897,988 kWh/year	\$ 59,333/year	6.61 c/kWh	<div style="background-color: #ccc; width: 100px; height: 15px; display: inline-block;"></div>		Supplier: TXU Energy	<div style="border: 2px solid red; padding: 2px; display: inline-block; margin-bottom: 5px;">Bills</div> <div style="border: 1px solid #ccc; padding: 2px; display: inline-block; margin-bottom: 5px;">Account Details</div> <div style="border: 1px solid #ccc; padding: 2px; display: inline-block; margin-bottom: 5px;">Usage</div> <div style="border: 1px solid #ccc; padding: 2px; display: inline-block;">Recreate Site Daily</div>

You can download a copy of the bill by clicking on the PDF icon. Depending on your level of access, you can download the bill information in CSV format by clicking on the Excel icon.

Supplier

07 Jan 2021 - 07 Feb 2021 (32 days)

Issued: 10 Feb 2021

TXU Energy

Bill Type: Standard

Usage: 57,440 kWh



Daily usage average: 1,795 kWh

Spend: USD 4,173.89

Daily spend average: USD 130

Effective rate: 7.27 c/kWh

Mark Bill as Invalid

Bills

Information displayed for each bill includes:

- Bill period
- Bill days
- Bill issue date
- Bill supplier
- Bill usage
- Average daily usage
- Bill spend
- Average daily spend
- Effective rate

Account Details

Click on the **Account Details** action to display details of the facility.

Accounts	Usage	Spend	Effective Rate	Supplier Account Number	Utility Account Number	Last Billed By	Action
<div style="background-color: #cccccc; width: 100px; height: 20px; margin-bottom: 5px;"></div> <p>Katy, TX 77449 US</p> <p>📍 Electricity</p> <p>Identifier: <div style="background-color: #cccccc; width: 100px; height: 15px; display: inline-block;"></div></p> <p>Cost Code: <div style="background-color: #cccccc; width: 100px; height: 15px; display: inline-block;"></div></p> <div style="background-color: #cccccc; width: 100px; height: 15px; display: inline-block; margin-top: 5px;"></div>	897,988 kWh/year	\$ 59,333/year	6.61 c/kWh	<div style="background-color: #cccccc; width: 100px; height: 15px; display: inline-block;"></div>		Supplier: TXUEnergy	<div style="border: 1px solid #ccc; padding: 2px; width: 100%; text-align: center;">Bills</div> <div style="border: 2px solid red; padding: 2px; width: 100%; text-align: center; margin-top: 2px;">Account Details</div> <div style="border: 1px solid #ccc; padding: 2px; width: 100%; text-align: center; margin-top: 2px;">Usage</div> <div style="border: 1px solid #ccc; padding: 2px; width: 100%; text-align: center; margin-top: 2px;">Recreate Site Daily</div>

Account Details

The details of the facility are split into five tabs:

- **Account Information** – Information about the facility including address, reference details, business unit, tag, size, billing address, cost code, GL code and meter number(s).
- **Supplier/Utility** – Information on the supplier details including supplier name, supplier start date, account number, account name, vendor code and purchase order.
- **Contact Setup** – Contact details for the site including name, email and phone as well as email alert setting for new bills.
- **Account Closing** – Closing date of the facility as well as the reason for closing.
- **Admin Setting** – Displays various admin settings for the site including distributor and meter data details, usage email address, geocoding and usage and spend estimates.

Depending on your access level, facility details can be updated by updating the applicable field in each tab and clicking on the **Update** button at the bottom of each tab.

Usage

Click on the Usage action to display usage at the facility.

Accounts	Usage	Spend	Effective Rate	Supplier Account Number	Utility Account Number	Last Billed By	Action
<div style="background-color: #ccc; width: 100px; height: 20px; margin-bottom: 5px;"></div> <p>Katy, TX 77449 US</p> <p>📍 Electricity</p> <p>Identifier: </p> <p>Cost Code: </p> <div style="background-color: #ccc; width: 100%; height: 15px; margin-top: 5px;"></div>	897,988 kWh/year	\$ 59,333/year	6.61 c/kWh	<div style="background-color: #ccc; width: 100%; height: 15px;"></div>		Supplier: TXUEnergy	<div style="border: 1px solid #ccc; padding: 2px; width: 100%; text-align: center; margin-bottom: 2px;">Bills</div> <div style="border: 1px solid #ccc; padding: 2px; width: 100%; text-align: center; margin-bottom: 2px;">Account Details</div> <div style="border: 2px solid red; padding: 2px; width: 100%; text-align: center; margin-bottom: 2px;">Usage</div> <div style="border: 1px solid #ccc; padding: 2px; width: 100%; text-align: center; margin-bottom: 2px;">Recreate Site Daily</div>

Usage

There are four reports you can review for usage at the facility, information displayed will depend on the metering and size of the facility:

- **Daily Usage** – Displays daily consumption at the site in a graph. You can filter by date range, export the data by clicking on the export button, or export the graph in various formats by clicking on the download icon.
- **Time of Use** – Displays usage split by time of use in a pie chart. You can filter by date range, export the data by clicking on the export button, or export the graph in various formats by clicking on the download icon.
- **Max Daily Demand** – Displays the maximum daily demand in a graph. It also displays the 5 highest demand periods for the time period selected. You can filter by date range, export the data by clicking on the export button, or export the graph in various formats by clicking on the download icon.
- **Monthly Demand Graph** – Displays the demand for the selected month. You can filter by month, export the data by clicking on the export button, or export the graph in various formats by clicking on the download icon.

Contract

Click on the **Contract** action to display the contract for the facility. This button will not appear if there is no contract for the facility.

A pop-up window will appear with the details of the contract including:

- Supplier details
- Contract expiry
- Contract period
- Contract pricing

You can download a copy of the contract by clicking **Download Contract**.

Payables

Payment Overview

New Charges Report

New Charges Report Search Results



Payment Overview

The payment section of the portal contains the new charges report.



The screenshot shows a dark navigation bar with a search input field on the left containing the text "Search by facility name, meter id or address:" and a magnifying glass icon. On the right, there is a dropdown menu showing "ht_AaronBrainMotorsPtyLtd" with a downward arrow. Below the search bar, a horizontal menu contains the following items: "Dashboard", "Facilities" with a downward arrow, "Payables" with a downward arrow and a red rectangular highlight, "Market" with a downward arrow, "Reports" with a downward arrow, and "Settings". On the far right of the navigation bar, there is a user profile section with the text "Welcome channelpartn...", a red "Logout" link with a right-pointing arrow, and a circular profile picture containing the letter "C".

New Charges Report

The New Charges screen shows all new charges for the client.

You can search for new charges for a specific facility or apply filters to look for a subset of specific facilities and date ranges.

You can download the new charges by clicking on the **Export** button and bulk mark charges as Paid with the button **MarkasPaid**.

Payables ?

New Charges Report United States

Search by facility name, meter no., or address

Filter by: Tags Commodities States Suppliers/Utilities Apply Advanced Filters

Displaying new charges report with 2477 latest bills from 2239 facilities Show Historical Bulk Action: Enter Date MarkasPaid Export

Facility	Spend	Bill Period	Last Billed By	Status	Approved By	Payment Status
 Data Identifier: B. Cost Code:	Incurred (USD ex. Tax): \$299.00 Incurred (USD inc. Tax): \$299.00 Due (USD inc. Tax): \$897.00	01 Apr 2021 - 30 Apr 2021 Issued: 01 Apr 2021 Captured: 28 Feb 2021 Due Date: 15 Apr 2021 Bill Type: Standard		Unjournaled		

New Charges Report Search Results

The new charges search results will display all new charges applicable to the filters applied. The search results include:

- **PDF Bill** – You can download the bill by clicking on the PDF icon.
- **Facility** – Displays the name, address, commodity, identifier and tags for the facility.
- **Spend** – Displays the incurred and due amounts.
- **Bill Period** – Displays the bill period, the issue date, the due date and the date the bill was captured by the portal.
- **Last Billed By** – Displays the supplier and account number that the last bill was issued by along with the GL and vendor codes.
- **Status** – The status of the new charge.
- **Approved by** – Displays who has approved the new charge.

Accruals

Current Month Forecast

Aged Accrual

Current Accrual

Alternate Methods for Accrual



Current Month Forecast

- Current Month Forecast is found on **Admin > Payment > Current Month Forecast**
- Current Month Forecast = Sum of Estimated Spend AND Actual Spend for current month
- The Estimated Spend for the current month can be referenced through the Usage and Spend graph

Accrual

Aged Accrual

Current Month Forecast

Current Accrual

Accrual Journal

Current Accrual (Alternate Methods)

Financial Accrual

March 2021 Forecast - United States **USD \$1,434,130** United States

Search by facility name, meter no., or address

Filter by Tags Commodities States Suppliers/Utilities **Apply Filter**

Include \$0 Forecasts Export

Facility	Estimated Usage	Estimated Accrual	Effective Rate	Last Billed By
Temple, TX 76501 US Data Identifier: Cost Code:	0 unit	USD \$467	0.0000 c/unit	

Aged Accrual

- Aged accrual is found on **Admin > Payment > Aged Accruals > Estimated Accrual**
- Aged accrual spend = Sum of all the estimated spend from last bill date +1 day until last day of last month (Last day of last month - Last Bill end date)

Case	Today	Last day of last month	Last bill end date	Accrued days	Estimated Accrual	
1	Accrued 1 day	1 May 2020	30 Apr 2020	29 Apr 2020	1 day	Estimated on 30 Apr 2020
2	Current month	15 May 2020	30 Apr 2020	5 May 2020	0 days	0
3	Over 2 years	2 Jun 2020	31 May 2020	31 Mar 2018	792 days	Estimated spend 31 Mar 2018 to 30 Apr 2020
4	Site closed 28 Apr 2020	15 May 2020	30 Apr 2020	25 Apr 2020	3 days	Estimated spend 25 Apr 2020 to 28 Apr 2020

Current Accrual

- Current accrual is found on **Admin > Payment > Current Accrual**
- Current Accrual Report is the combined **Current Month Forecast** and **Aged Accrual**

Case		Today	Last bill end date	Last day of next month	Accrued days	Estimated Accrual
1	Last bill date > start date	9 Feb 2020	31 Jul 2019	30 Aug 2020	334 days	Estimated spend 1 Aug 2019 to 31 Mar 2020
2	Last bill date < start date	9 Feb 2020	30 Jun 2019	31 Jul 2020	365 days	Estimated spend 1 Jul 2019 to 31 Mar 2020
3	Site is closed 16 Jan 2020	9 Feb 2020	30 Nov 2019	31 Mar 2020	47 days	Estimated spend 1 Dec 2020 to 16 Jan 2020
4	Date range changed (default 1 Jul 2019 – 31 Mar 2020)	9 Feb 2020	31 Jul 2019	31 Mar 2020	243 days	Estimated spend 1 Jul 2019 to 31 Mar 2020

Alternate Methods for Accrual

Method	Logic
Last bill	Last bill spend / Bill days
90 days data	Bill spend sum for 90 days from last bill end date / Days bill data is available in the 90-day window from last bill end date
365 days data	Bill spend sum for 365 days from last bill end date / Days bill data is available in the 365-day window from last bill end date
Interval data	$(\text{Interval usage} + \text{Estimated usage}) * \text{Last Bill rate}$ (for the selected period)
Prior year usage	<p>Estimated Energy spend based on prior year usage and current contract/ trade (if applicable) + Estimated charges (Network, Metering, Environmental, Other) charges from site daily</p> <p>Estimated Energy spend based on prior year usage and current contract = $(\text{Prior year Peak usage for the estimating period} * \text{Network Loss factor from site} * \text{Peak rate from contract}) +$ $(\text{Prior year Off-peak usage for the estimating period} * \text{Network Loss factor from site} * \text{Off-peak rate from contract}) +$ $(\text{Prior year Shoulder usage for the estimating period} * \text{Network Loss factor from site} * \text{Shoulder rate from contract}) +$ $(\text{Days in estimating period} * \text{Service rate from contract})$</p>

Budgets

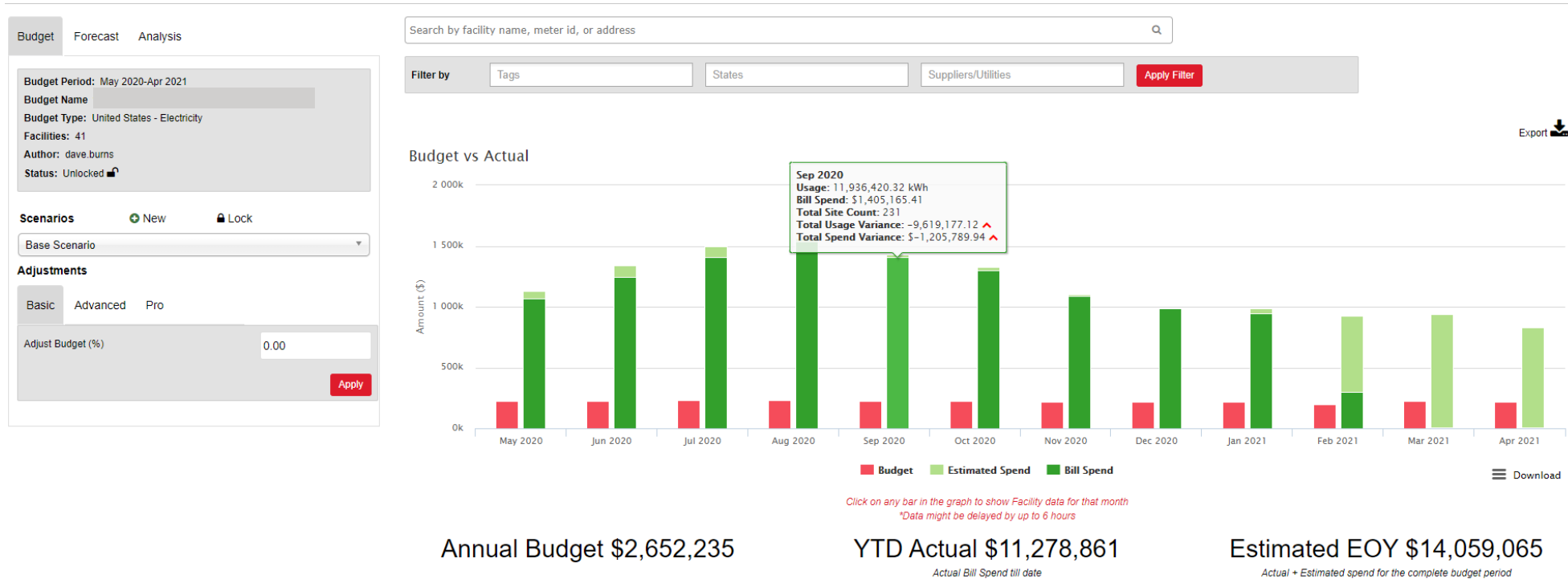
Budgets Overview

Budgets – Setting Up



Budgets Overview

Budgets are initially created from the last 12 months of billing data. A scenario allows you to adjust this base Budget for known or expected future changes in energy spend. You can add one or more Scenarios to create test-cases for your predicted changes.



Budgets - Setting Up

- **Basic adjustments** allow you to increase or decrease the entire Budget by a fixed percentage.
- For improved Budget accuracy, **Advanced adjustments** allow you to increase or decrease specific energy spend components across your entire portfolio or on a state-by-state basis.
- Click on any bar in the graph to show facility data for that month.
- Once you have decided to use your base Budget or one of its Scenarios, you need to lock it to use the Forecast and Analysis features, with the **Lock** icon.
- Under the **Forecast** and **Analysis** tabs you can create monthly Forecasts over time, and run reports that compare the Budget, its Forecasts, and actual Spend.

Market

Market Overview

Energy Futures

Spot Market Analysis



Market Overview

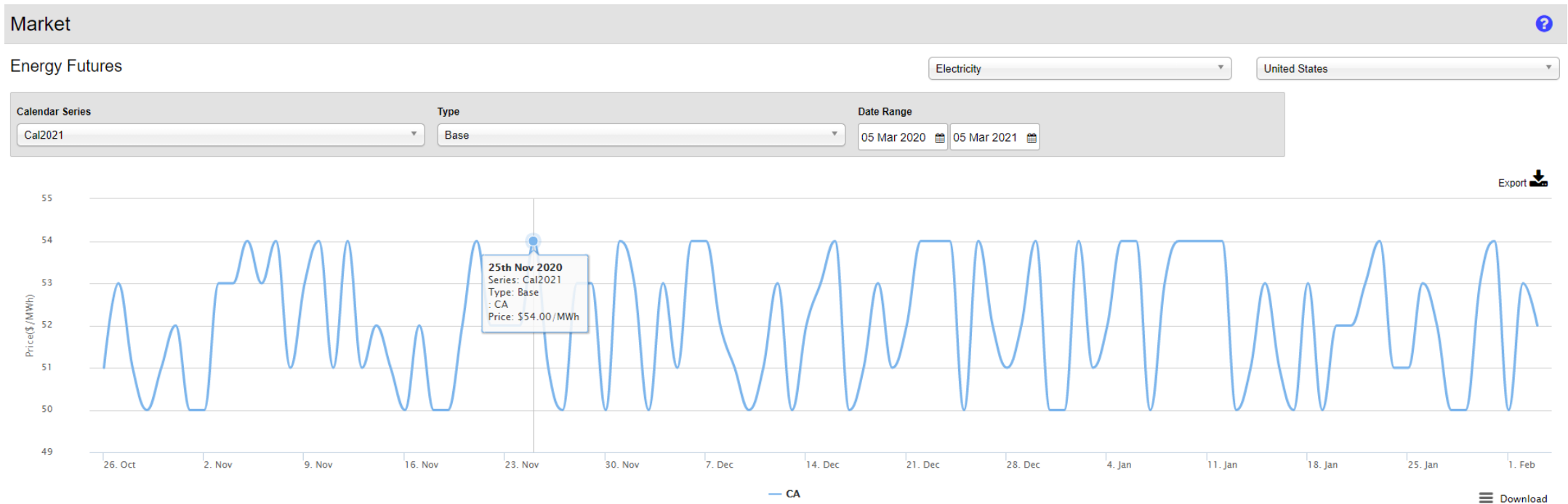
This menu item enables users to receive up to date information on market pricing and trends, as well as developments in key price drivers.



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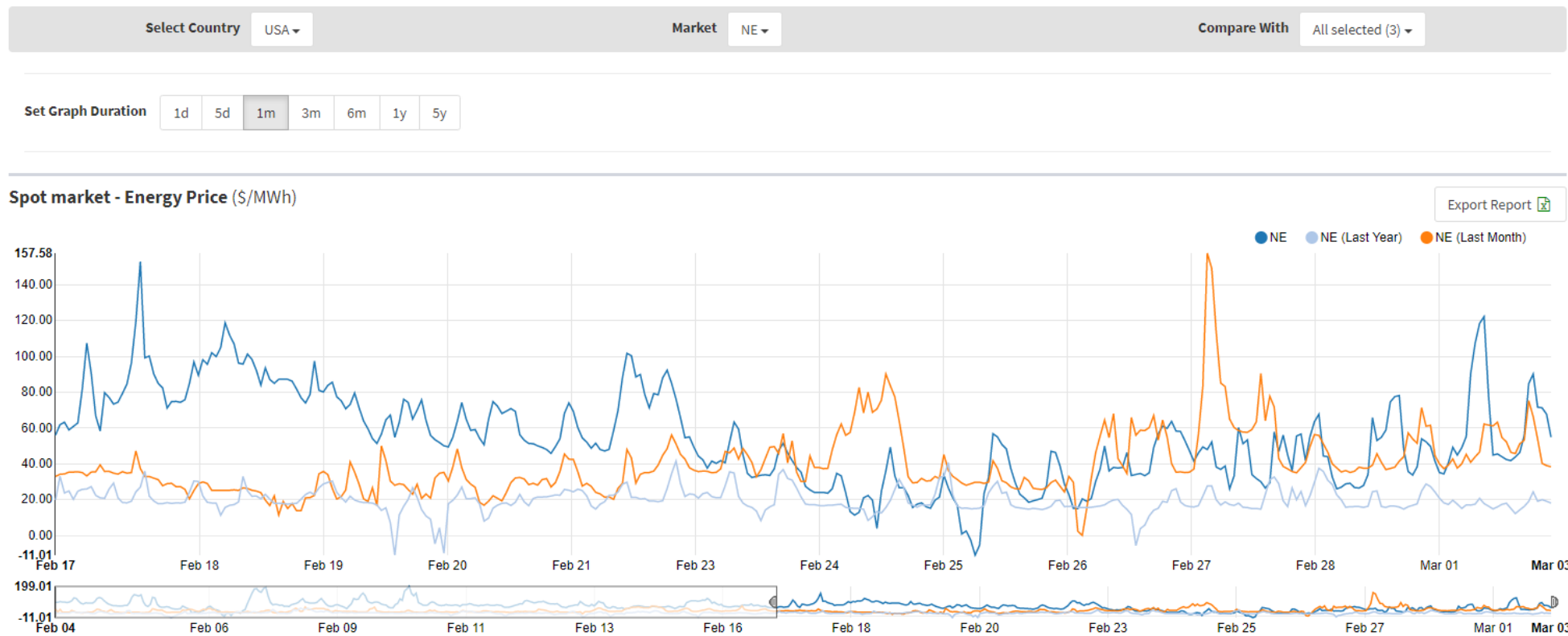
Energy Futures

Energy Futures shows exchange traded wholesale market price trends for a variety of contract products.



Spot Market Analysis

Spot Market analysis provides analysis and comparison of spot market movements in selected markets.



Reports

Reports Overview

Usage and Spend

Estimated Greenhouse Gas Emissions

Interval Usage Profile

Energy Usage Intensity Benchmarking

Billing Data



Reports Overview

The **Reports** menu item of the portal contains various reports. These can be accessed by clicking on the menu on the left-hand side.

The screenshot shows the top navigation bar of the portal. On the left, there is a search bar with the placeholder text "Search by facility name, meter id or address:" and a magnifying glass icon. To the right of the search bar, the user's name "ht_AaronBrainMotorsPtyLtd" is displayed with a dropdown arrow. Below the search bar, the navigation menu includes "Dashboard", "Facilities", "Payables", "Market", "Reports", and "Settings". The "Reports" menu item is highlighted with a red rectangular box. On the right side of the navigation bar, there is a user profile section with the text "Welcome channelpartn...", a "Logout" button with a red arrow icon, and a circular profile picture containing the letter "C".

Below the navigation bar, the "Reports" menu is expanded into a dropdown list. The menu items are:

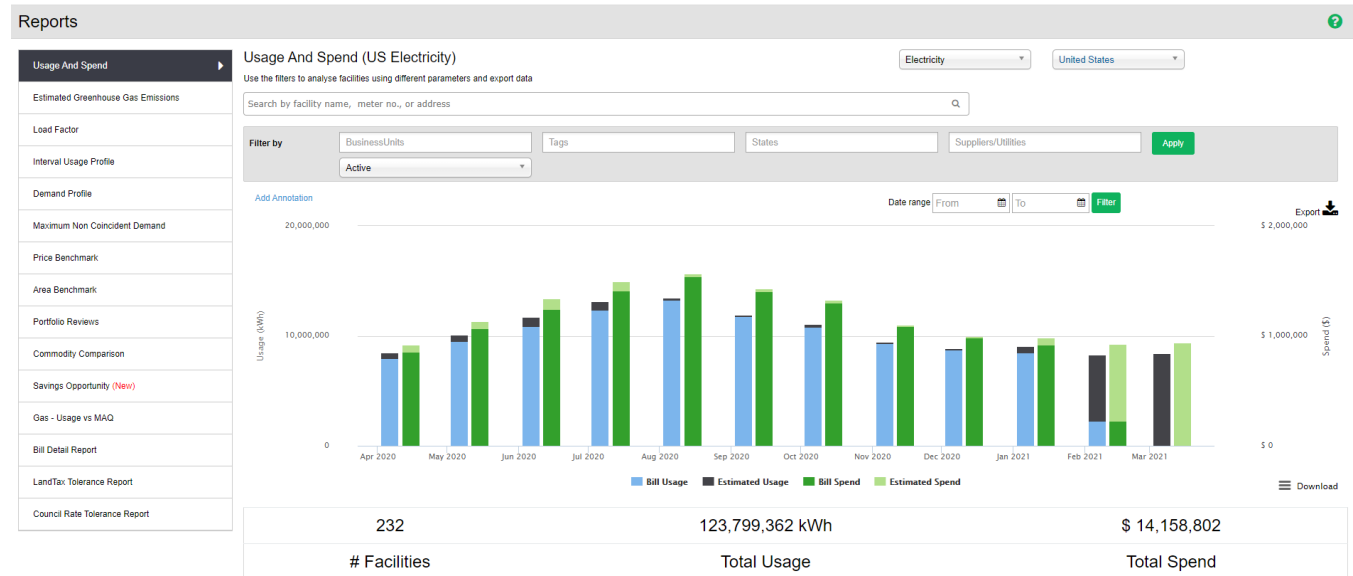
- Usage And Spend
- Estimated Greenhouse Gas Emissions
- Interval Usage Profile
- Billing Data

Usage and Spend

The usage and spend chart shows 12 months of rolling data for total bill spend and usage across all facilities. You can filter each category in the chart by clicking on the key labels.



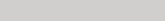

You can apply filters to search for a subset of facilities, apply a specific date range or search for a specific facility.

The graph can be downloaded by clicking on **Download** and the search results can be exported by clicking on **Export**.



Usage and Spend

The search results are displayed under the graph listing each facility the search results apply to. If no filters are applied, then all facilities are listed:

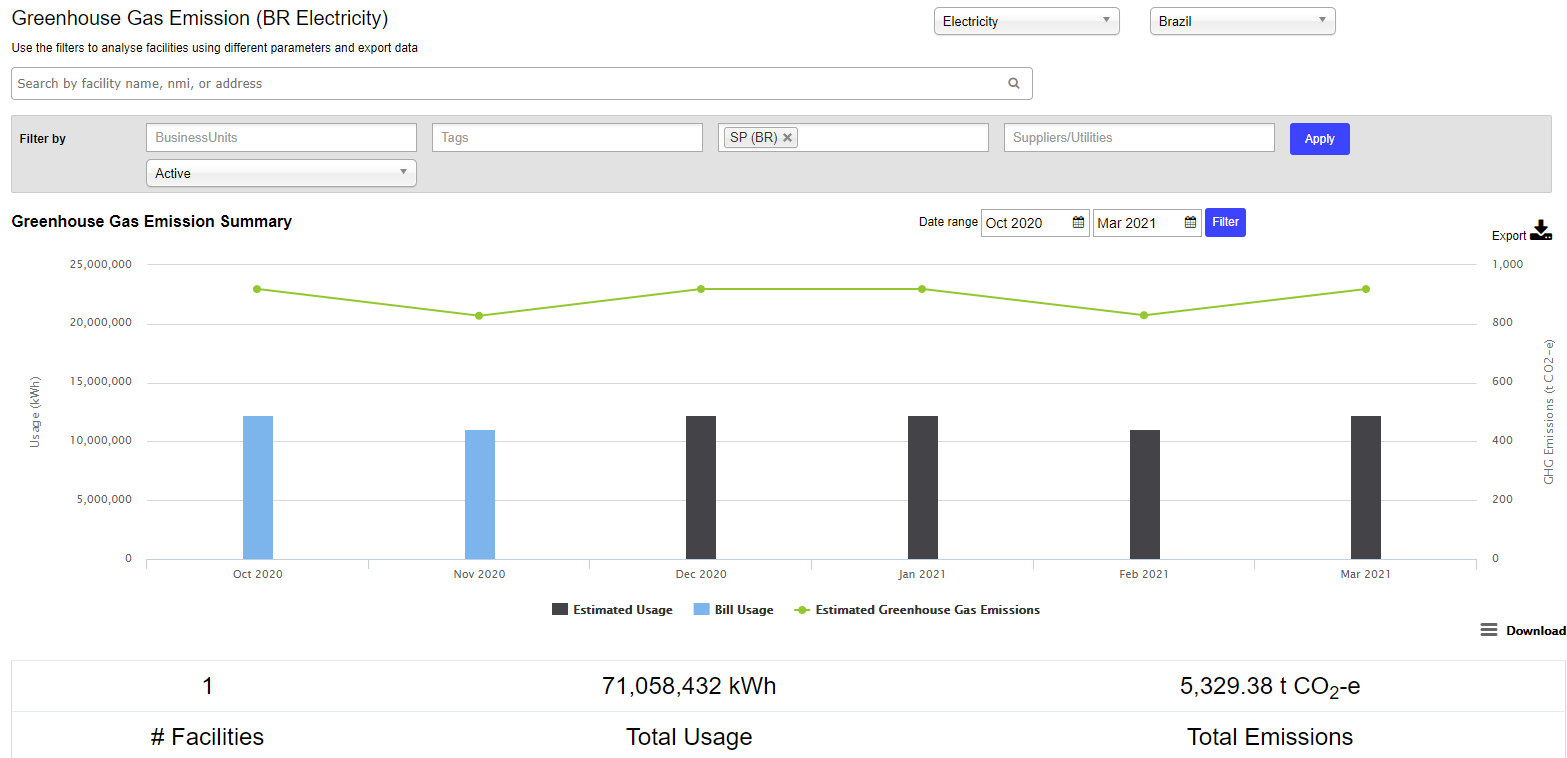
Facilities	Usage	Spend	Effective Rate	Action
 Huntington Beach, CA 92648 US 📍 Electricity Identifier:  Cost Code  	270,691 kWh / year	\$ 44,591 / year	16.47 c/kWh	Refresh Data Usage Details Bills

The search results include:

- **Facilities** – The name, address, commodity, identifier and tags for the facility.
- **Usage** – The usage for the facility for the specified date range.
- **Spend** – The spend for the facility for the specified date range.
- **Effective Rate** - The cost of a unit of supply in cents including all charges (energy and supply to property).
- **Actions** – You can view usage details or bills for the facility.

Estimated Greenhouse Gas Emissions

The **Greenhouse Gas Emission** chart shows greenhouse gas emissions against usage for the date range specified. You can filter each category in the chart by clicking on the key labels. For any search results to be returned you must apply filters first.



Estimated Greenhouse Gas Emissions

You can apply filters to search for a subset of facilities; apply a specific date range or search for a specific facility.

The graph can be downloaded by clicking on **Download** and the search results can be exported by clicking on **Export**.

The search results are displayed under the graph listing each facility the search results apply to:

Facility	Total Usage	Total Emissions
<input type="text"/> 3715		
<input type="text"/>		
<input type="text"/>		
<input type="text"/> Electricity		
Account: <input type="text"/>	71,058,432 kWh 255,810 GJ	5,329.38 t CO ₂ -e

The search results include:

- **Facility** – The name, address, commodity, identifier and tags for the facility.
- **Usage** – The usage for the facility for the specified date range.
- **Emissions** – The emissions for the facility for the specified date range.

Interval Usage Profile

The **Interval Usage Profile** chart shows the interval usage against the date range specified. You can filter each category in the chart by clicking on the key labels. For any search results to be returned you must apply filters first.

You can apply filters to search for a subset of facilities, apply a specific date range or search for a specific facility.

The graph can be downloaded by clicking on **Download** and the search results can be exported by clicking on **Export**.



Energy Usage Intensity Benchmarking

This initiative examines the relative performance of sites with similar attributes e.g., area of comparable sites, production output, other units of value.

Example

Sites within an account can compare their energy usage per area footage of the site with the same property type. Examining a site or industry's energy usage intensity data against a similar building of the same industry, gives the business a reference point with regards to energy performance. This benchmarking analysis allows businesses to determine whether their sites are performing efficiently or not.

Bill Identity's energy usage intensity benchmarking analysis allows an account to get visibility on:

- How a site's energy usage and profile align with that of a comparable site
- How a site stacks up against an average building
- How a site's energy usage compares across all sites with the same property type

Sites that show significant differences to that of the average or a compared site, provide good targets for improvement with energy-saving opportunities.

Methodology

- 12 months of usage is plotted against nominated attribute
- Chart is presented within the platform in the **Area Benchmark** menu item under **Reports** module

Energy Usage Intensity Benchmarking

Sites within an account can compare their energy usage per area footage of the site with the same property type. Examining a site or industry's energy usage intensity data against a similar building of the same industry, gives the business a reference point with regards to energy use. This benchmarking analysis allows businesses to determine whether their sites are performing efficiently or not.

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- How a site's energy usage compared across all sites with the same property type

Sites that show significant differences to that of the average or compared site, provide good targets for improvement with energy-saving opportunities.

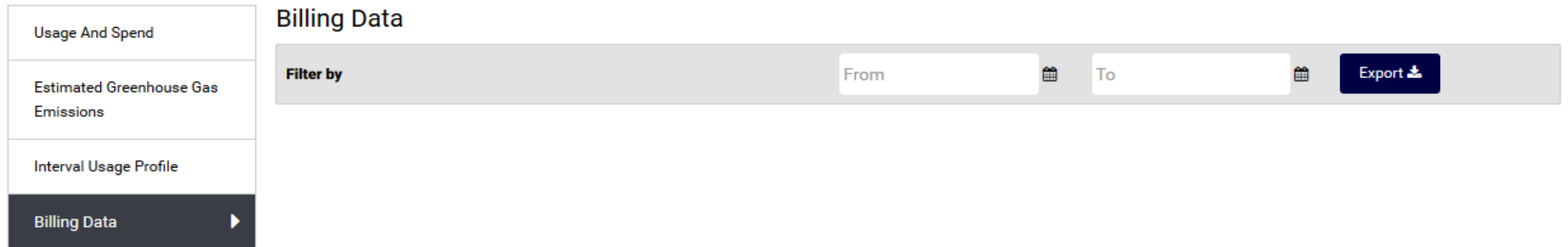
Methodology

- Energy intensity can be analyzed over any time period, usually 12 months for industry comparison
- Intensity, defined as kWh / Net Lettable Area (NLA) / day, is compared against other sites within the account

Billing Data

The billing data page shows you the filter from and to date for the billing data export. You can filter the billing data for a specific date range.

The data can be exported by clicking on **Export**.



The screenshot displays the 'Billing Data' section of a web application. On the left is a vertical sidebar menu with four items: 'Usage And Spend', 'Estimated Greenhouse Gas Emissions', 'Interval Usage Profile', and 'Billing Data'. The 'Billing Data' item is highlighted with a dark background and a white right-pointing arrow. To the right of the sidebar, the main content area is titled 'Billing Data'. Below the title is a horizontal filter bar with a light gray background. The filter bar contains the text 'Filter by' on the left, followed by two date input fields labeled 'From' and 'To', each with a calendar icon to its right. On the far right of the filter bar is a dark blue button with the text 'Export' and a download icon.

Settings

Settings Overview



Settings Overview

The settings menu allows you to customize the settings for the portal.



The screenshot shows a dark navigation bar with a search input field on the left containing the text "Search by facility name, meter id or address" and a magnifying glass icon. On the right, there is a dropdown menu showing "ht_AaronBrainMotorsPtyLtd" with a downward arrow. Below the search bar, a horizontal menu contains the following items: "Dashboard", "Facilities" with a downward arrow, "Payables" with a downward arrow, "Market" with a downward arrow, "Reports" with a downward arrow, and "Settings" which is highlighted with a red rectangular box. To the right of the menu, the text "Welcome channelpartn..." is visible, followed by a red "Logout" button with a right-pointing arrow and a circular profile icon containing the letter "C".

Quick Guides

Download a Bill

View and Download Usage

Update Tags

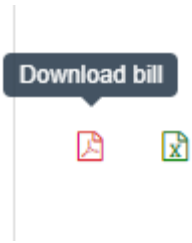
Download Contract

Download Interval Data



Download a Bill

1. Enter the Facility Name, Meter ID or Address at the top of the page
2. Click on **Bills**
3. Click on the PDF icon to download the invoice



View and Download Usage

1. Enter the Facility Name, Meter ID, Reference or Address at the top of the page
2. Click on **Usage**
3. Click on the Usage action to display usage at the facility.

There are four reports you can review for usage at the facility, information displayed will depend on the metering and size of the facility:

- **Daily Usage** – Displays daily consumption at the site in a graph. You can filter by date range, export the data by clicking on the export button, or export the graph in various formats by clicking on the download icon.
- **Time of Use** – Displays usage split by time of use in a pie chart. You can filter by date range, export the data by clicking on the export button, or export the graph in various formats by clicking on the download icon.
- **Max Daily Demand** – Displays the maximum daily demand in a graph. It also displays the 5 highest demand periods for the time period selected. You can filter by date range, export the data by clicking on the export button, or export the graph in various formats by clicking on the download icon.
- **Monthly Demand Graph** – Displays the demand for the selected month. You can filter by month, export the data by clicking on the export button, or export the graph in various formats by clicking on the download icon.

Update Tags

1. Enter the Facility Name, Meter ID, Reference or Address at the top of the page
2. Click on **Facility Details**
3. Enter or Remove tag(s) in **Tag** field

Tag

You can have multiple Tags separated by comma

Please note: Multiple tags can be added separated by a comma

4. Click **Update**
5. A window will appear to confirm update of site details. Click **Ok**
6. A window will appear to confirm the site has been updated. Click **Ok**

Download Contract

1. Enter the Facility Name, Meter ID, Reference or Address at the top of the page
2. Click on **Contract**
Note: If there is no contract button on the facility, this means there is no contract loaded on the portal.
3. Click **Download Contract**

Download Interval Data

1. Enter the Facility Name, Meter ID, Reference or Address at the top of the page
2. Click on **Usage**
3. Enter the Date Range for the interval data and click **Apply**

Filter By Date Range

4. Click on **Export**



Contact

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