ESB Energy EV Fleet Management Portal Guide

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1. Introduction

The ESB Energy EV Fleet Management Portal has been developed to allow you, the Fleet Manager, to effectively administer and manage your ESB Energy EV fleet account. It offers a range of useful features and functions which make it easy for you to control, track and monitor charging for all drivers in your fleet, as well as the ability to manage spend. This guide provides an overview of the portal and demonstrates the various features it offers.

2. Signing in

The Fleet Management Portal is available online at https://myevaccount.esbenergy.co.uk. For the best overall experience, we recommend that you access it via a desktop or laptop, using Google Chrome or Microsoft Edge. To sign in, you'll require;

1) **the email address you included on your registration form**,
2) **your password**,

which you would have created following receipt of an email by you from us requesting that you do so. Simply enter both pieces of information on the sign in screen to get access.
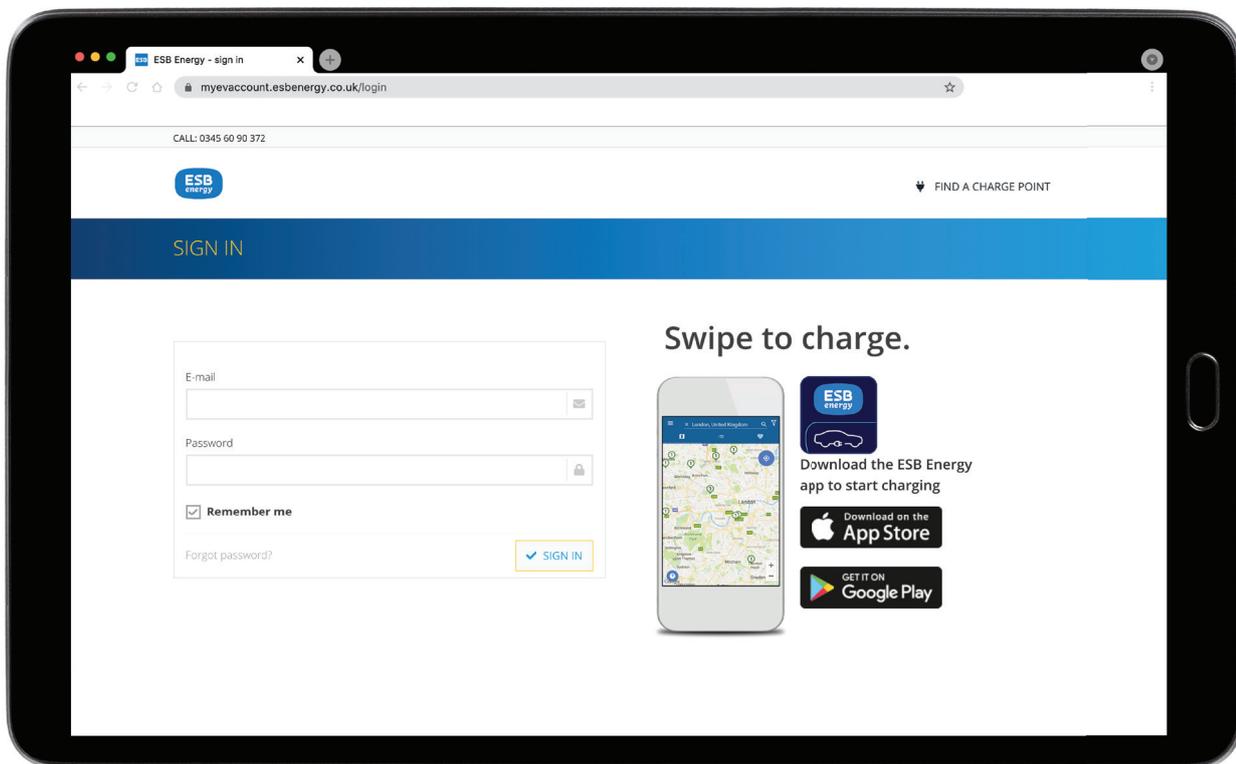
Once access is granted, you will be taken to your profile, or prompted to enter your payment card details. Should you wish to reset your password at any time, just click on the '**forgot password**' link on the sign in page at https://myevaccount.esbenergy.co.uk.

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3. *Finding a charger*

To find and locate a charge point, you can use our charge point map. This can be accessed by clicking the '**find a charger**' link from the main navigation menu on the left. We don't require you to sign in to use the map, although additional features will be available to you if you do.

When you open the charge point map for the first time, it will request to use your location to show you the charger closest to you. You can zoom in and out or move / pan left and right to see more specific charge point information, or to view chargers in other locations.

Available chargers will be shown on the map in green, with those in use being displayed in blue, and so on. A handy legend showing the meaning of all the different icon colours and types is provided. Click on the '**?**' icon on the map to view it.

Clicking on the individual coloured icons will allow you to drill down to view the individual chargers and their connectors. You can see how many of each type are at the location, the cost to charge, the power level and much more.
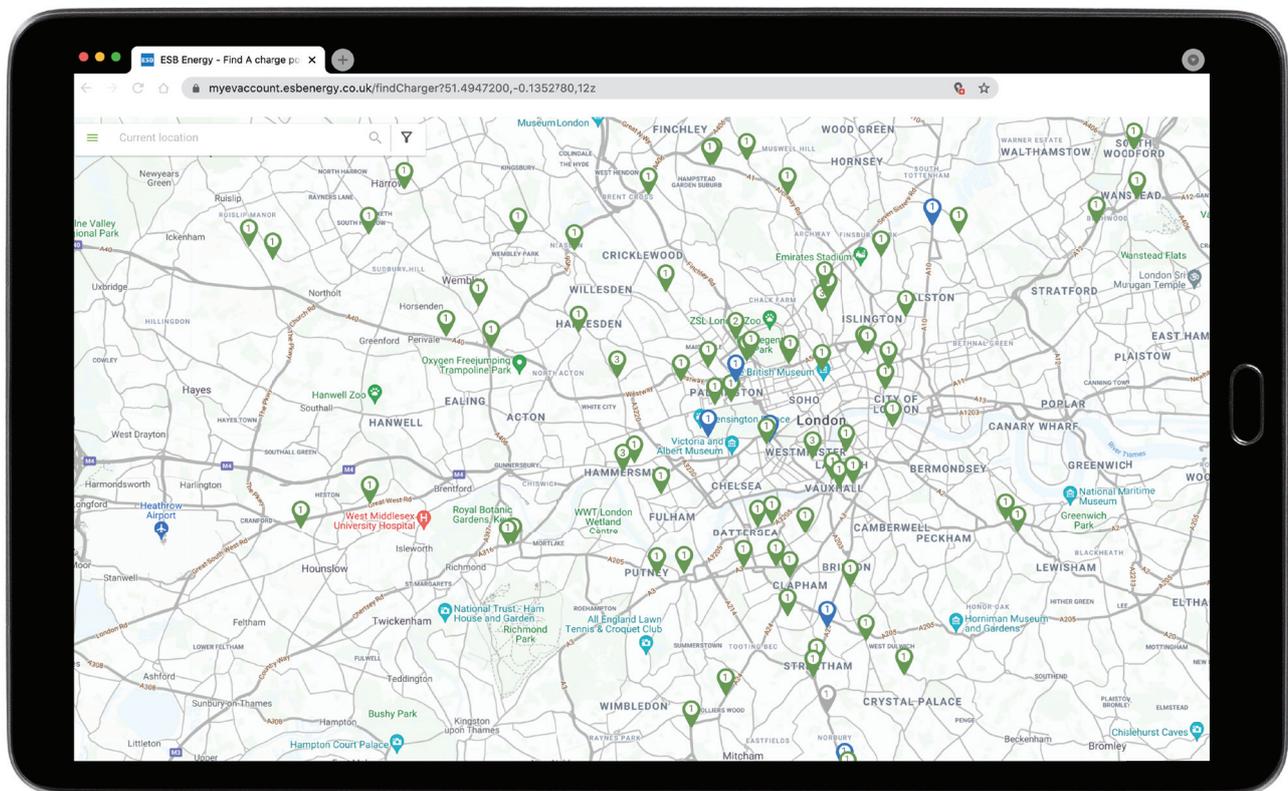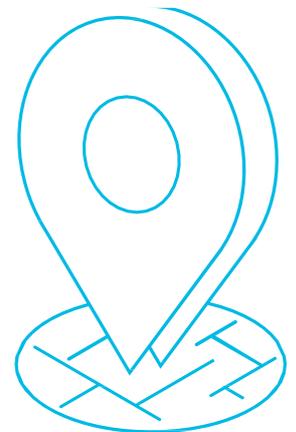
4. Managing your profile

When signed in, this section of the portal allows you to manage aspects of your fleet account such as name and sign-in information, drivers / members, charge point access cards, spend, usage, and more. To access it, click on the '**Profile**' link in the main navigation menu.

a) Profile ———————➔ i.) *Personal Information*

Here you can maintain information such as your name and contact number, view the T&C's as well as the particulars of your assigned fleet plan product, and see when you last signed in. After making any changes, make sure to click on '**Save changes**'. Please note that the email address is fixed and cannot be changed via the portal.

a) Profile ———————➔ ii.) *Address*

Here you can view and update your organisations contact addresses, both for billing and mailing purposes. To make any changes, simply edit the relevant fields, and click '**Save changes**'.

**a) Profile** ———————➔ iii.) *Changing your Password*

This section allows you to change your password. To do so, you must enter your current password, followed by your new one. Click '**Save changes**' when you are finished. We strongly advise that you choose a strong password, remembering to keep it safe and secure at all times. We also encourage you to change your password regularly to minimise the risk of any unauthorised access to your account.

b) Charge history
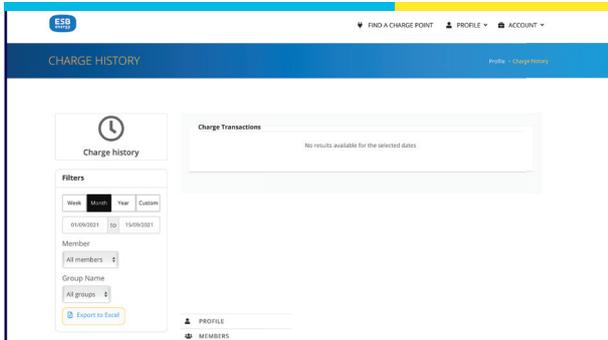
This section of the portal allows you to view and monitor charging usage across your entire fleet, either by individual driver or by specific driver group. It also enables you to track spend, and to create and download custom, historic usage reports for further analysis in tools such as Microsoft Excel. Filter options of '**week**', '**month**' and '**year**' make it simple to see an overview of charging for the current week, month or for the year to date, and the '**custom**' option lets you define your own specific date range and duration.

c) Member
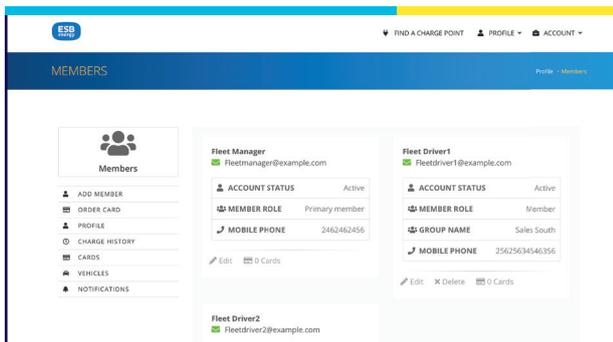
The member area facilitates the management of every member (including Fleet Manager and drivers) on the fleet account. Essentially each member is a driver. The screen displays an overview of all drivers, including names, roles, contact details, and the driver groups to which they belong. A driver group is a virtual grouping of a set of drivers, intended to make

it easier to track usage for large fleets. For example – a fleet manager may have a multi-purpose fleet, with some vehicles used by management, others by sales staff, and others by field staff. Driver groups enable these driver categories to be defined collectively, so they can be tracked and monitored as a single unit or cost centre.

To edit details for an individual driver, click the '**edit**' button next to the driver's information. To delete a driver, simply click the '**delete**' button.

When editing a driver, it's possible to change the name, mobile number, and driver group to which the driver belongs. You may wish to do this to make it simpler to manage and track your drivers.

Please note however that the email address is fixed and cannot be changed. You can assign a driver to a pre-existing driver group by selecting it from the '**group name**' dropdown. If you wish to assign a driver to a new group, select '**new group**' from the dropdown, and enter the name in the '**new group name**' field. After making any changes, make sure to click on '**Save changes**'. Any newly created driver groups once saved will appear in the '**group name**' dropdown.

d) Cards
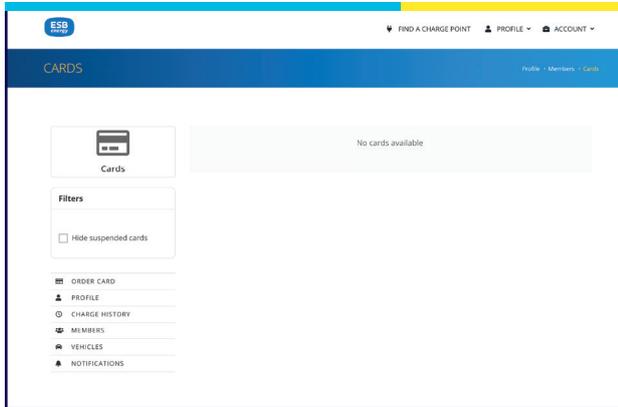
The cards screen allows you to view and manage all charge point access cards that have been assigned to your account.

For each card, its status, number, and the driver to whom it is assigned will be displayed. If a card is lost or stolen, you should de-activate it by clicking on the '**Suspend**' link.

e) Vehicles
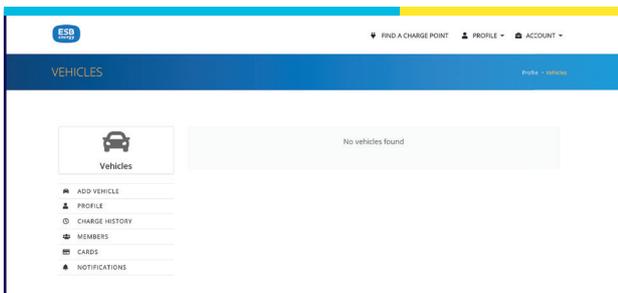
This area of the portal allows you to view and add information on the various vehicles in your fleet, including make, model, registration, and colour. Each vehicle will be listed against the over-all fleet, as opposed to being associated with an individual driver or driver group. To add a vehicle, click the '**add vehicle**' link. Any of the details you enter can be amended at any time by clicking the '**edit**' button next to the vehicle's information. To delete a vehicle, simply click the '**delete**' button.

f) Notifications
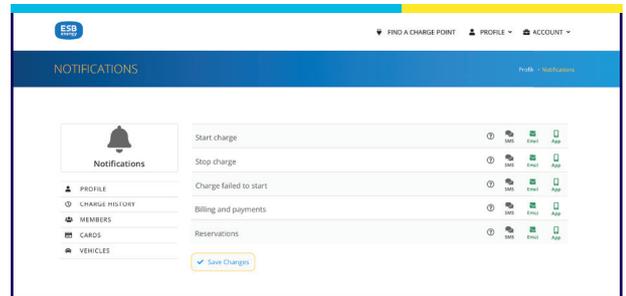
This screen lets you configure your preferences regarding if / how we should alert you of specific events relating to your account. We can notify you via email or if applicable, by way of a push notification within our **EV Plug In** mobile app, should specific pre-defined transaction types occur e.g. when a new invoice becomes available, a driver starts charging, or a payment fails for any reason. You can choose both the alerting method that bests suits you, and the specific transaction types you'd like to receive notifications about. To do so, click to toggle (on / off) the icons next to each transaction category.

5. *Managing your account*

The account section of the portal allows you to view and manage the financial aspects of your account, including contracts, payment methods, invoices, and chargeable transactions, and to see the current balance. To access it, click on the '**Account**' link from the main navigation menu.

a) **Your account** ⟶ i.*) Billing contracts*
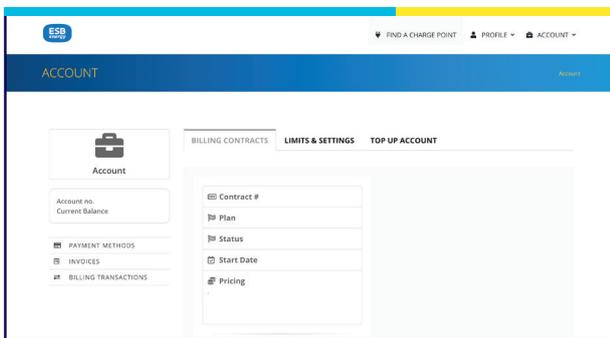
Here you can see specific details relating to your contract with us. This includes such information as the start date, billing plan, set-up fee, monthly subscription charges, contract duration etc.

a) **Your account** ⟶ ii.*) Limits and settings*

If applicable, this screen allows you to activate and set an automatic top-up, which will trigger should the available balance on your account drop below a certain amount. This feature means that you're not required to perform a manual top-up each time a driver is unable to charge due to a low balance issue, making account management much simpler and more efficient.

***a)*** **Your account** ⟶ iii.*) Top up account*

If applicable, you can top-up your account balance from here. Simply enter the required top-up amount in the box and click 'top up my account'. If successful, the balance on the account will be adjusted to reflect this, and confirmation of the top-up will be shown under '**Billing Transactions**' and in the '**Invoice**'.

b) **Payment methods**
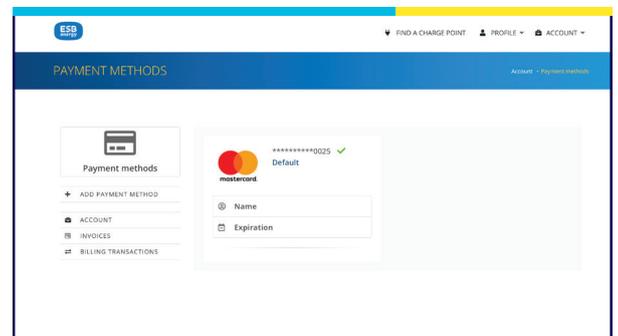
This area of the portal allows you to view, add or amend the payment methods we have on file for your account. All payment cards registered will be displayed here. To add a new payment card, click '**add payment method**', and enter your card details. To change your active payment card (the one to be used to pay), select it from the list of available cards, and choose '**make default**'. To delete a payment card, click '**delete**' next to the card you wish to remove. You must have at least 1 valid payment method active on your account.

c) Invoices
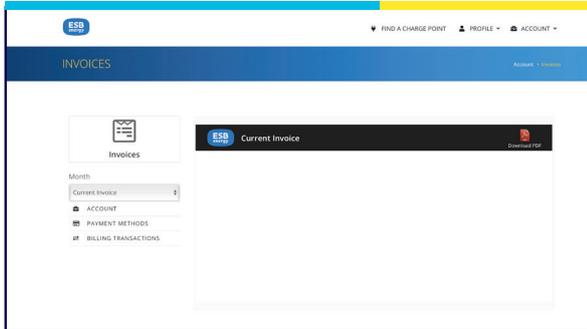
The invoices screen allows you to view and download the current open invoice, as well as ones that have been previously generated and are closed. The content of the invoice selected in the '**month**' dropdown will be displayed on the screen, with the '**Download PDF**' button allowing you to download an official version in PDF format. All relevant activity on your account including charging costs, overstay fees, monthly subscription charges and set-up fees if applicable will be shown. To view past invoices, simply choose from those available in the '**month**' dropdown.

d) Billing transactions
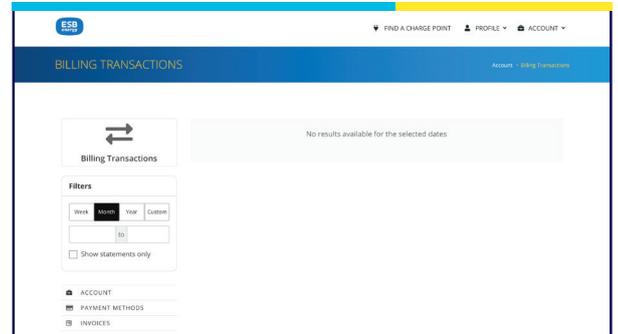
This section of the portal allows you to see an overview of all chargeable transactions on your account for a specifiable time period, including the date / time they were processed, the transaction type, cost, balance on your account and your fleet plan. By clicking on the individual transactions listed, you can see a breakdown of the over-all cost. The default filter options of '**week**', '**month**' and '**year**' make it simple to see an overview of charging for the current week, month or for the year to date, and the '**custom**' option lets you define your own specific date range and duration.

6. Reporting an issue

Should you have an issue, you can report it to us directly from the fleet management portal. Just click the '**Report an issue**' link located at the bottom of each page, choose the type of issue you're having from the dropdown marked '**I'm having a problem with**', and provide some details in the '**Description**' box.

7. Driver access

Access to the fleet management portal is also available for each of the drivers in your fleet. Although they will have limited access, it will enable them to benefit from many of the features already described in this guide, including the charge point map, the ability to view and download a record of their own charging history, as well as the capability to review and confirm their active cards. They will be unable to perform any fleet management related tasks. To sign in, they will require an email address and a password. The email address will take the form *rfidcardnumber-companyname@esbenergyev.co.uk* where the card number will be the visible number on their assigned charge point access card, and the company name will be the company name that was registered with us. The default one-time password is **ESBEnergyFD2$!**. Drivers will be prompted to change this upon first sign in.