

# How to use the 'my insite' customer portal

A guide for pay-as-you-go (PAYG) residents

Debt balance

£0.00

Debt recovery rate ⓘ 0%

Top up account

Automatic top ups

# A guide to our customer portal 'my insite' for pay-as-you-go residents

Insite Energy's new customer portal, 'my insite', allows you to manage your energy account on any internet connected device. Once you have created an account, you can check your balance, manage your payments, and much more.

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Set up your account in three simple steps. All you need is your personal details and your 19-digit payment number.

### How to set up two-factor authentication (2FA)

This optional security feature allows you to use a second means of identity verification to reduce the risk of identity fraud and cyber hacking.

### How to make an online top-up

Whether you're at home, at work or away, through 'my insite' you can top-up your account from any internet connected device.

### How to set up and manage your automatic top-ups

Take control of your balance by either setting up a balance based or date based recurring payment through 'my insite'.

### How to make a guest payment

If you are unable to log into your account or register, you can still make a payment using our guest payment feature.

### How to view your payment history and statements

Reviewing your payment history is super easy as well as viewing your annual statements.

### How to update your contact details and password

If you need to update your contact details, you can do so directly within 'my insite'. You can also change your password.

### How to add 'my insite' as an icon on your device

'my insite' is a web-app, and is not available for download. As such, we have included instructions on how to add it as an icon on your mobile device.

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## The difference between a balance based and a date based automatic top-up



A **balanced based auto top-up** will take an amount of your choosing when your balance falls below a certain amount.

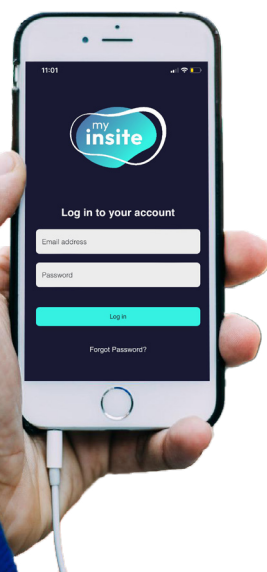
e.g. Top up £20.00 when my balance reaches £10.00.



A **date based auto top-up** will take a fixed amount from your nominated bank account on a specific date.

e.g. Top up £20.00 on 1<sup>st</sup> of each month.

**Both will help keep your balance healthy.**



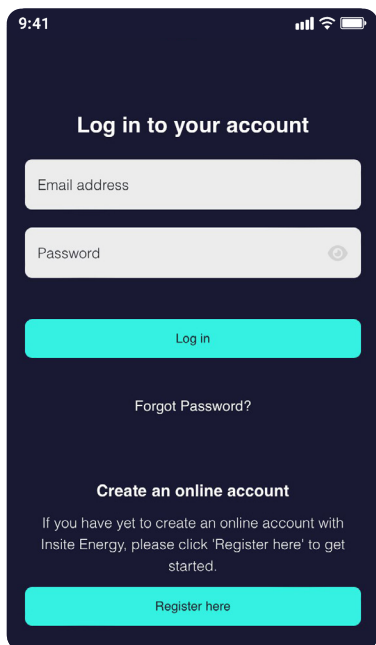
click here to create a 'my insite' account



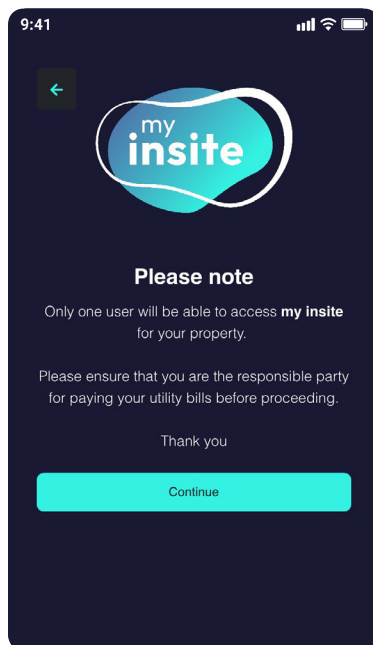
or visit [my.insite-energy.co.uk](https://my.insite-energy.co.uk)

## How to set up an account

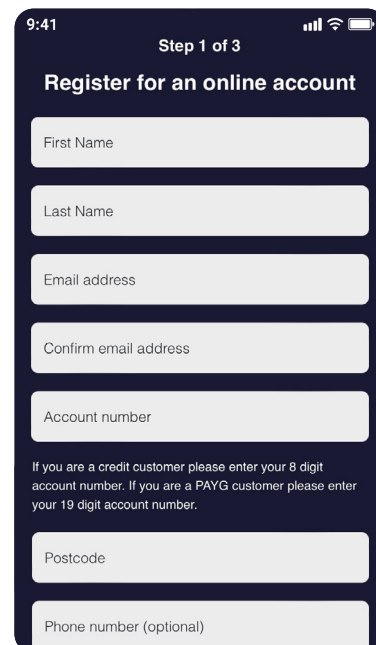
Before setting up your account, please ensure you are the responsible party for paying your utility bills.



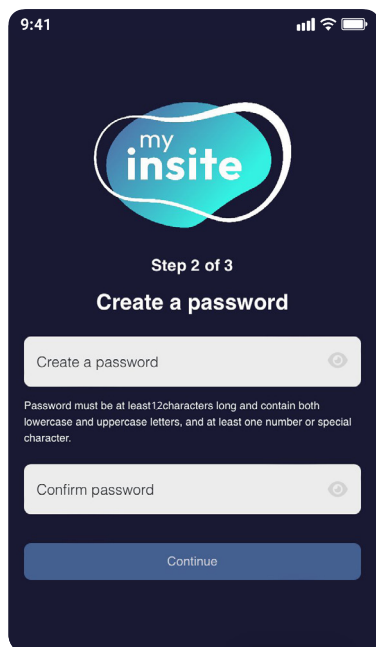
1 Type [my.insite-energy.co.uk](https://my.insite-energy.co.uk) into your selected browser, and click on the 'Register here' button.



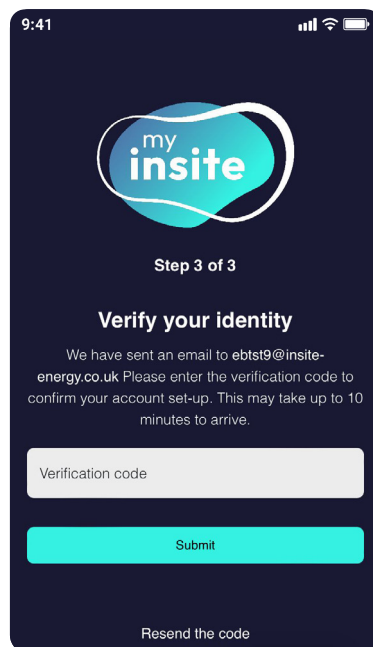
2 Confirm you understand only one user will be able to access 'my insite' for your property.



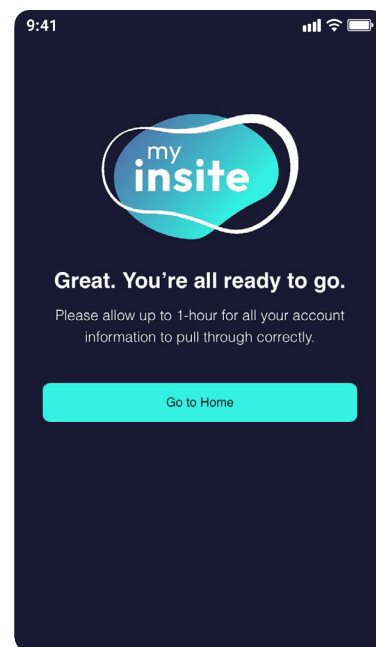
3 Enter your details. Enter your name, email address, 19-digit account number, and postcode.



4 Set up a secure password.



5 Enter the verification code sent to your registered email address.

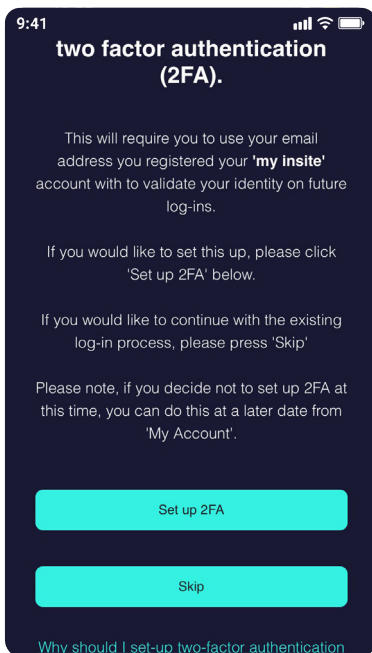


6 Once you have verified your identity, your 'my insite' account will be set up and ready to go.

⚠ Please note, you will only be able to complete registration if your details match those we have of you in our system.

## How to set up two factor authentication (2FA)

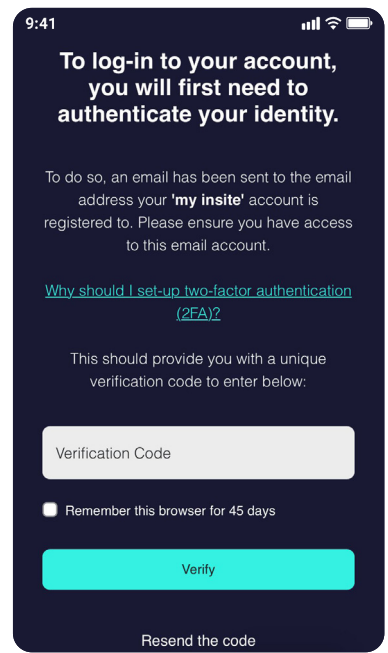
To reduce the risk of identity fraud and cyber hacking, we have implemented 2FA. This means that you provide a second means of authentication on top of your username and password. Setting this up is currently optional but may become mandatory in future.



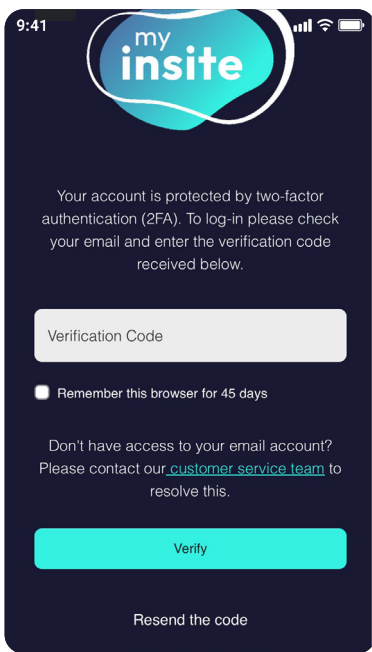
**1** After registration, you'll be given the option to set-up two factor authentication (2FA). You can do this by clicking the respective button, or simply 'Skip'.



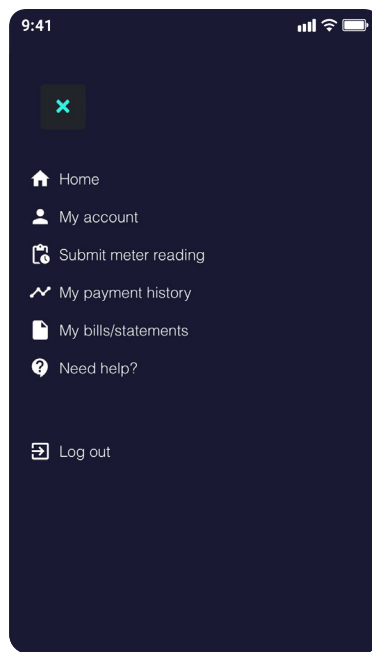
**2** This will trigger an email to be sent to your registered email address with a 6-digit code.



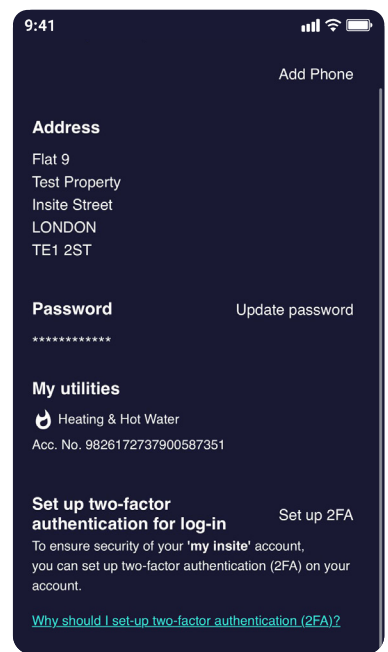
**3** Copy the 6-digit code from the email and enter it in the 'Verification code' field. You can also choose to remember your device for 45 days. Click 'Verify'.



**4** When you next log-in you will be taken to a new 2FA screen. A 6-digit code will be sent to the email again. Enter this in the 'Verification code' field.



**5** If you chose not to set up 2FA at that time, you can so at any time by clicking the burger menu in the top right corner and click 'My account'.

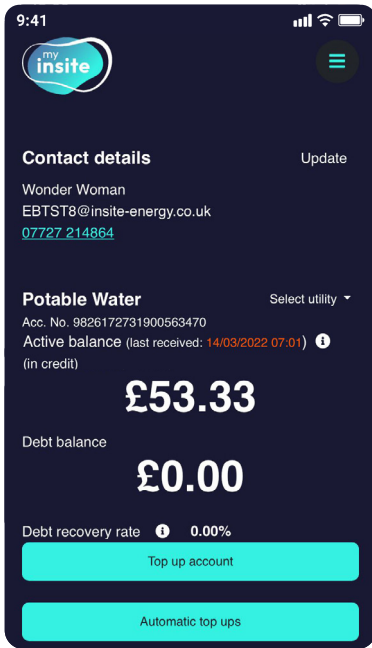


**6** Scroll to the bottom of the page and click 'Set up 2FA'. This will take you through the 2FA set-up screens.

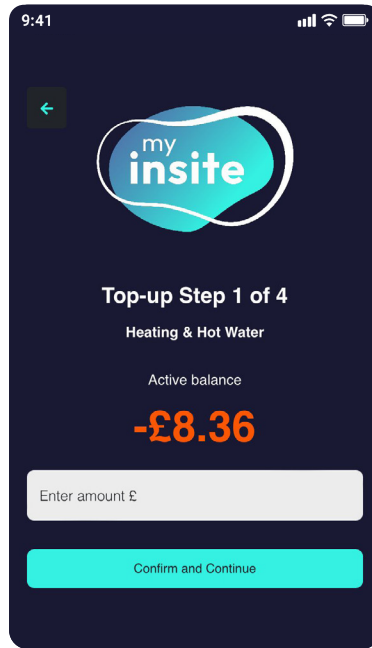
**⚠️ If you did not receive a code, check your junk folder or click 'Resend code'. If you still haven't received it, contact our customer services team.**



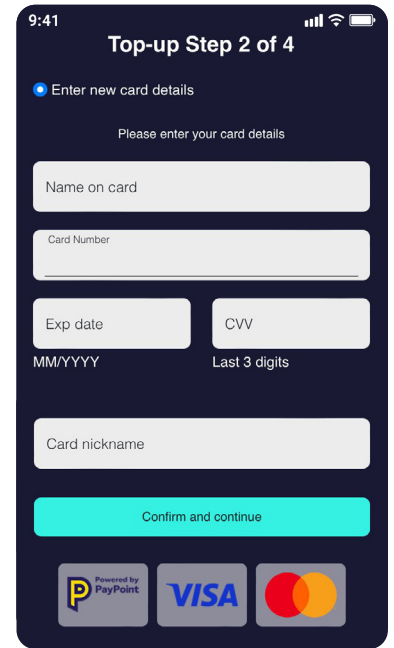
## How to make an online top-up



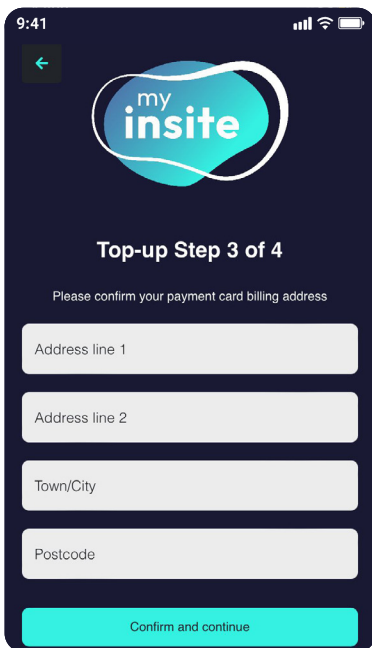
1 Click 'Top up account' on the homepage.



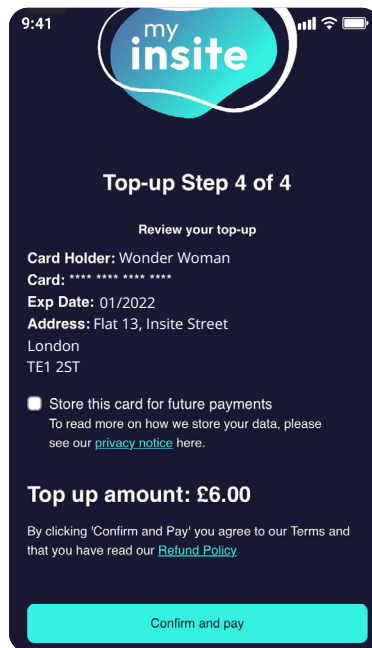
2 Enter an amount between £5 and £300 you wish to top-up your account by.



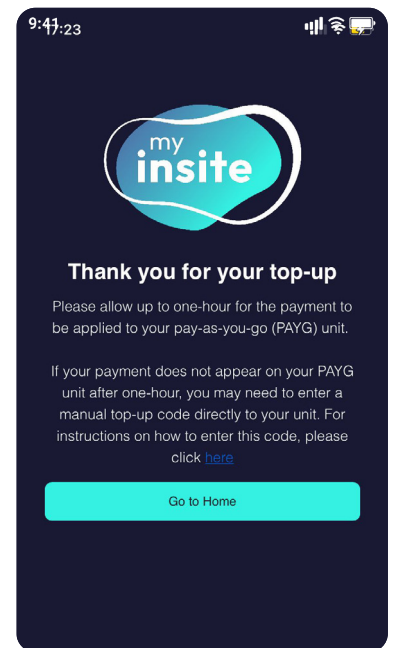
3 Here you will have the option to add a new payment card or select a previously stored one. You can also remove any stored payment cards from this screen.



4 If you are making a payment using a new card, you will need to confirm the address that card is registered to.



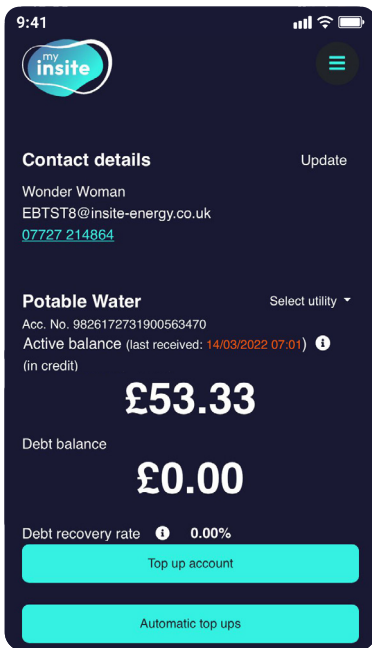
5 Confirm your details are correct. If you wish to store the card details for future top-ups, please tick the check box next to 'remember this card for future payments'.



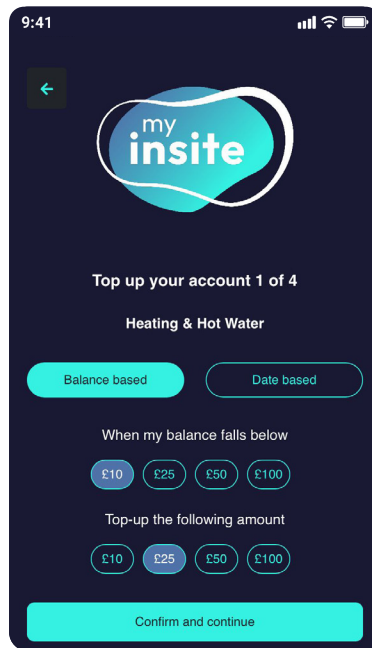
6 If the payment is successful, you will be taken to a 'Thank you screen'.

**⚠ Please note, it may take up to one hour for the payment to be applied to your pay-as-you-go unit and become visible on your payment history.**

## How to set up and manage your automatic top-ups

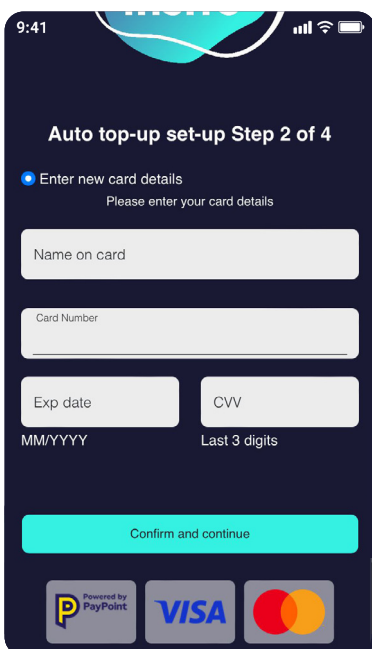
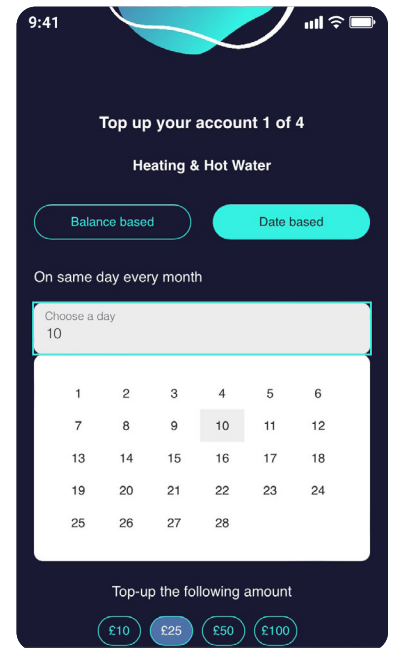


1 Click 'automatic top ups' on the homepage.



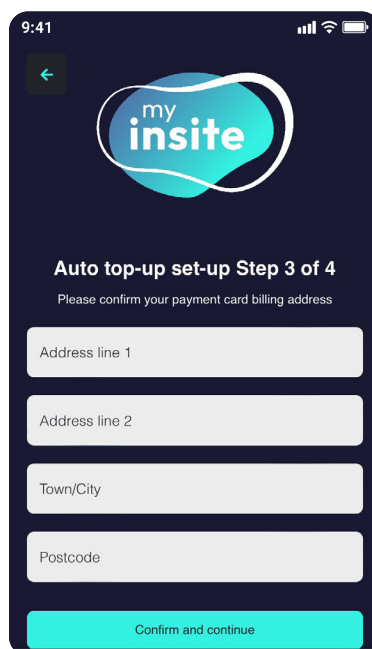
2 To set up a balance based auto top-up, click on 'Balance based'. Select the balance trigger at which you want a payment to be taken. Then select the payment amount you want taken at this trigger point. Click 'Confirm and continue'.

To set up a date based auto top-up, click 'Date based'. Select the date (between 1st-28th) and the payment amount you want taken on this date each month. Click 'Confirm and continue'.

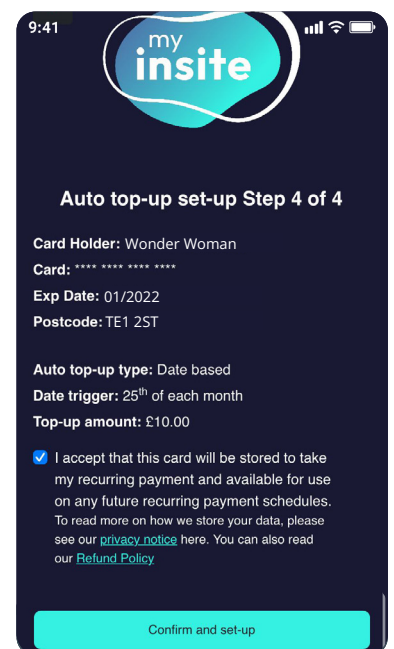


3 Add a new payment card or select a pre-authorized payment card.

You can also remove any stored payment cards from this screen.

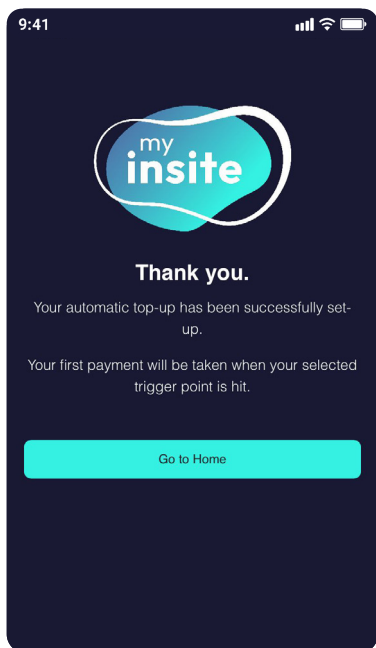


4 If you are adding a new card you will need to confirm the billing address the card is registered to.



5 Confirm your details are correct. Your payment card will be automatically stored in order to take the automatic top-ups in accordance with your trigger points.

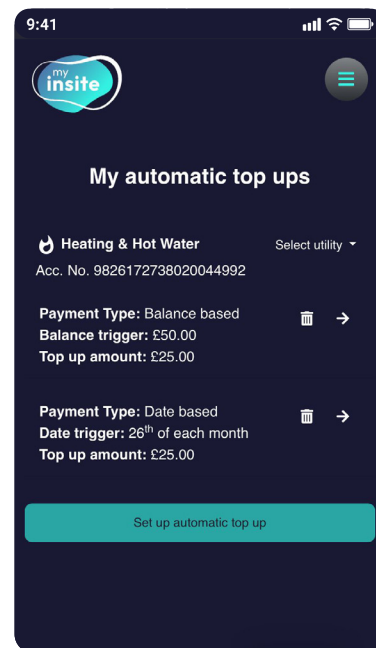
## How to set up and manage your automatic top-ups (contd.)



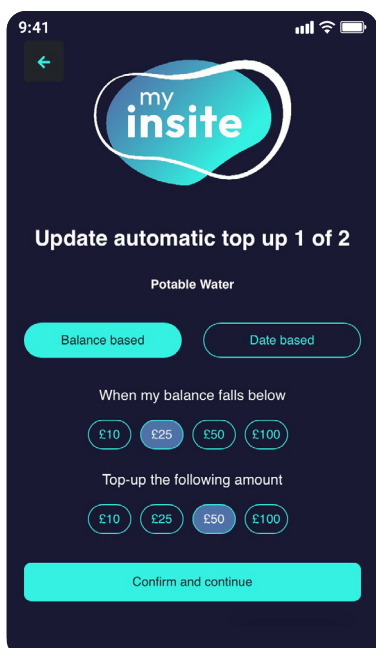
6 If your auto top-up schedule is successfully set-up, you will be taken to a 'Thank you' screen.



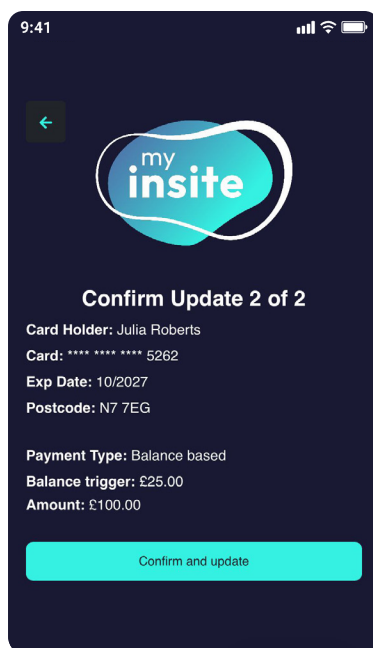
7 If your auto top-up has failed for any reason, you will receive the above email. Please follow instructions to ensure the payment does not fail again.



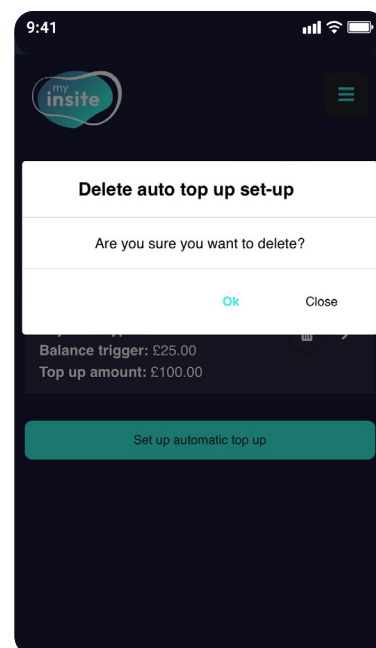
8 To view a list of active auto top-ups click on '**Automatic top-ups**' on the home screen. To adjust one of your schedules, click the arrow on the right hand side.



9 You will be taken to a screen where you can adjust the balance or date trigger or top-up amount. When you've changed the set-up, click '**Confirm and continue**'.



10 Confirm your details are correct. To apply the changes, click '**Confirm and update**'.

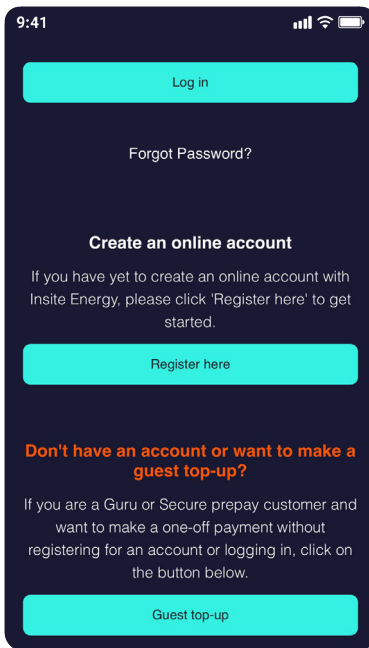


11 To delete an auto top-up, click on the bin icon on the right hand side. Press '**Yes, delete it**' to confirm the deletion.

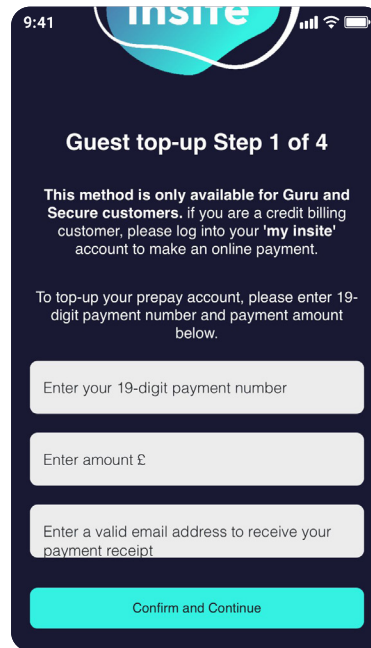
⚠ Please note, for balance based auto top ups, the entered top-up amount will be taken from your debit or credit card when your balance falls below the selected trigger point.

For date based auto top ups, the entered top-up amount will be taken from your debit or credit card on your chosen date each month.

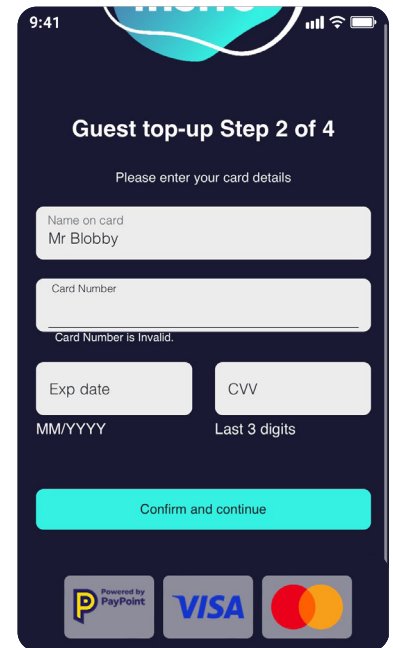
## How to make a guest payment



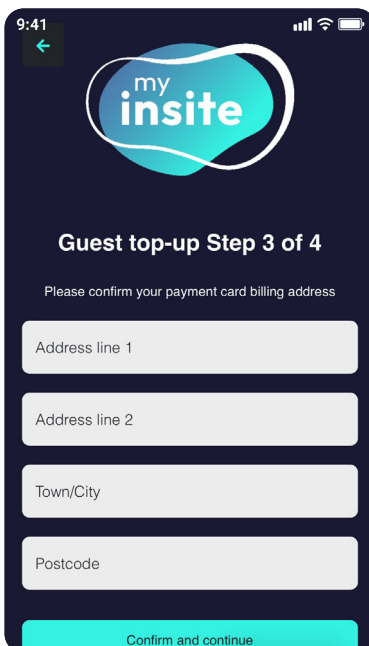
- 1** If you are unable to register or log-in and want to top-up your account, head to the bottom of the log-in page, click 'Guest top-up'.



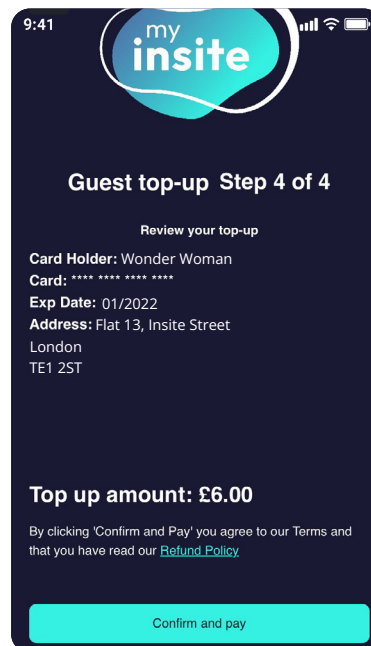
- 2** Enter your 19-digit payment number, the payment amount you wish to make, and an email address to send the payment receipt to.



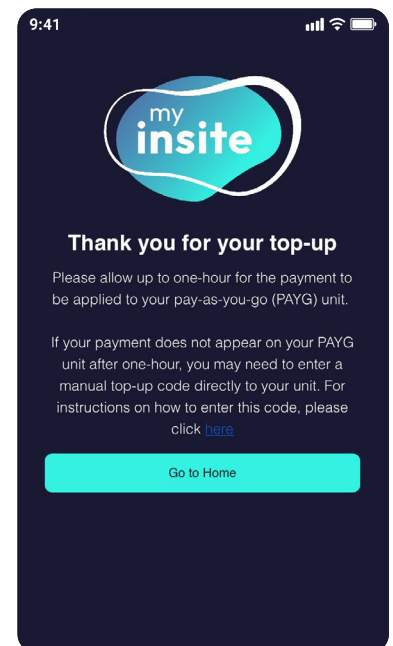
- 3** Enter your card details.



- 4** Confirm the billing address the card is registered to.



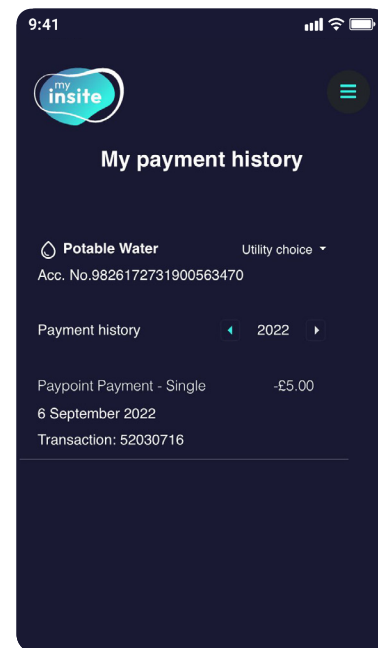
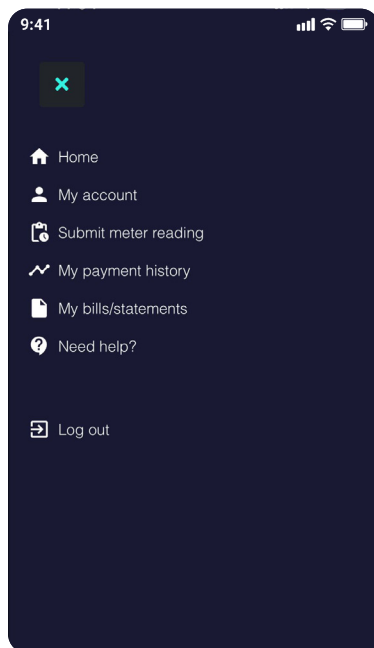
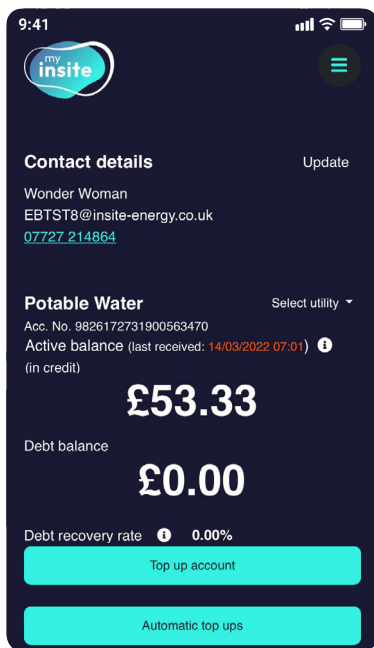
- 5** Confirm your payment instruction is correct.



- 6** If the payment is successful, you will be taken to a thank you page. A payment receipt will also be sent to the email address you entered in step 2.



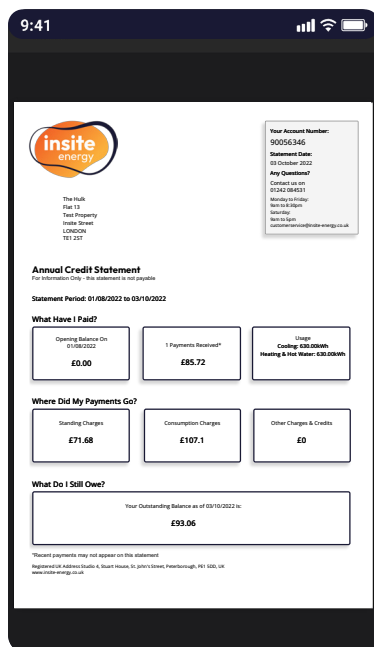
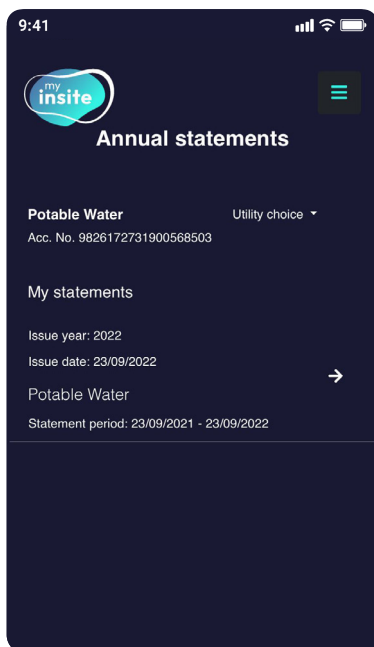
## How to view your payment history and annual statements



**1** To view your payment history, click **'My payment history'** either from the bottom of the homepage, or from the menu in the top-right corner (the three horizontal lines).

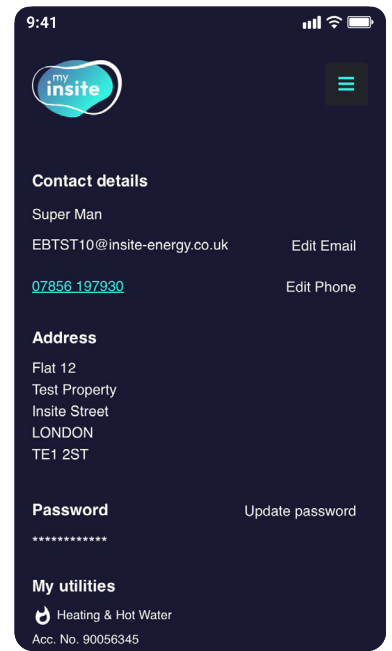
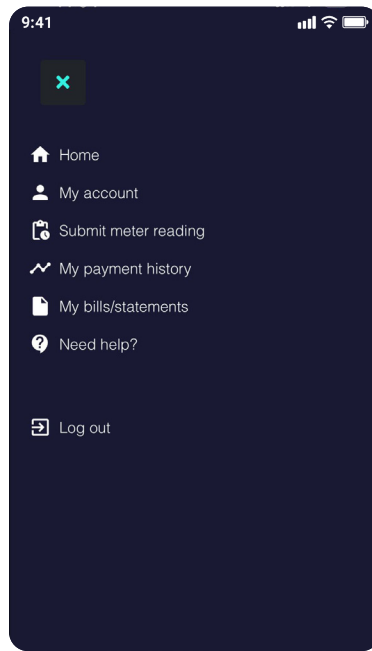
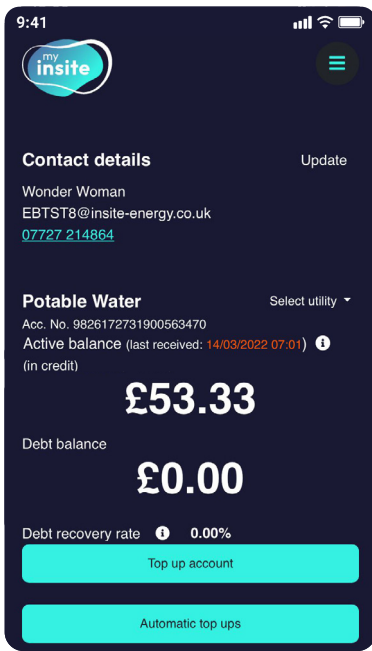
To view your annual statements, click **'My statements'** either from the bottom of the homepage, or from the menu in the top-right corner.

**2** On the **'My payment history'** page, you will be able to see the date, type, and amount against each payment. These are displayed in chronological order with your most recent payments at the top.



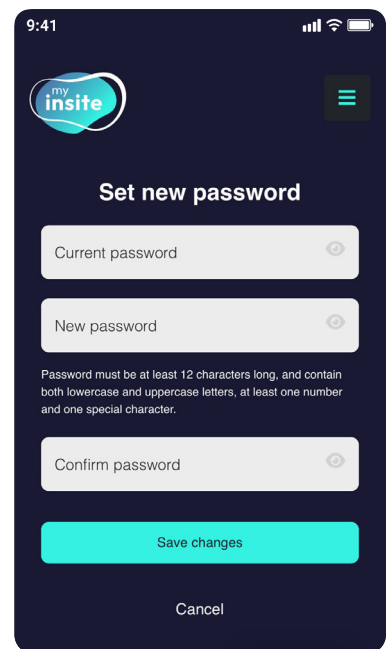
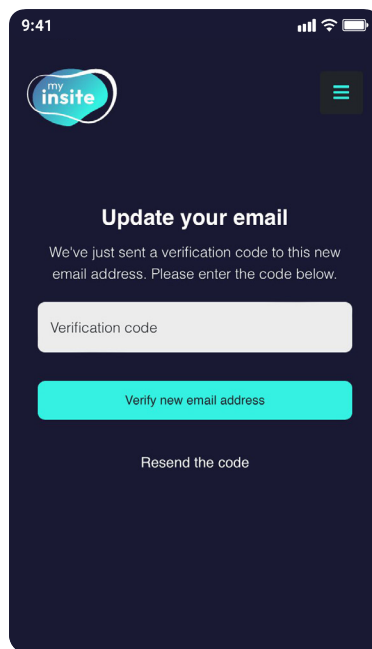
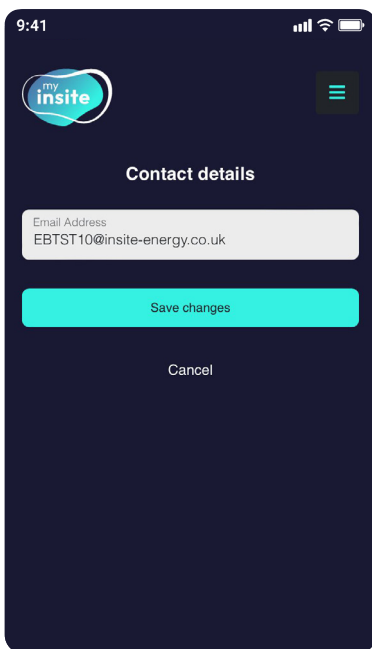
**2** On the **'My statements'** page, you will be able to see the date each annual statement was issued and the time period it covers. These are displayed in chronological order with your most recent statement at the top. These can be opened, downloaded as a PDF, and printed.

## How to update your contact details and password



**1** To view the details we have saved to your account, click **'My account'** from the menu in the top-right (the three horizontal lines). If you want to change your email address or phone number you can click **'Update'** from the home page.

**2** If you click through from the menu you will see a list of the details we have stored against your account. To change your details, click **'Edit email'** or **'Edit phone number'** as required.



**3** After clicking **'Edit email'**, enter the new email address you wish to use.

**4** This will trigger a verification code to be sent to this new email address. To verify your request, please enter the code.




**5** You can also update your password. Simply follow the on-screen instructions.

**▲ To let us know you are moving home, please complete and submit our 'Moving out' form found in the 'Contact us' page within the menu.**

## How to add 'my insite' as an icon on your device?

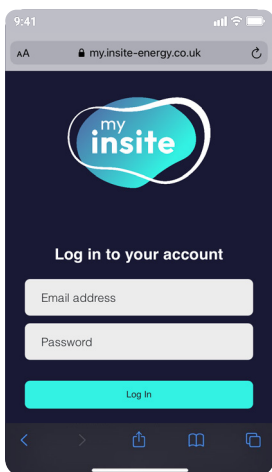
'my insite' has been developed as a web-app, making it accessible via any web-browser on any internet connected device without needing to download an app.

'my insite' was developed this way to:

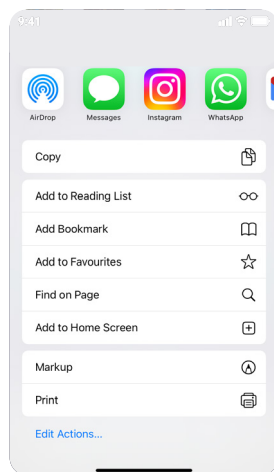
-  make it affordable
-  make it accessible to everyone regardless of the type of internet-connected device used
-  allow us to easily make software updates without any disruption to you.

Depending on whether you have an Apple (iOS) or Android device, you can save 'my insite' as an app icon on your phone by following the relevant instructions below:

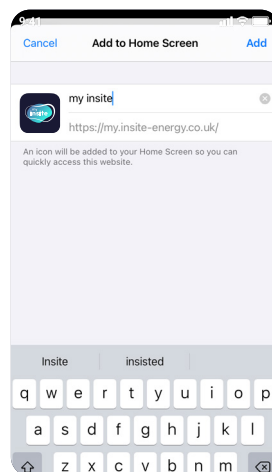
### For Apple/iOS devices



1 Type **my.insite-energy.co.uk** into Safari and tap the share icon.



2 This will open a menu. Click on the 'Add to home screen' button.

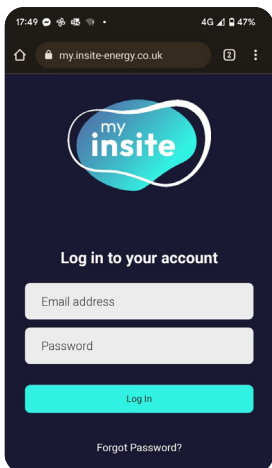


3 Follow the instructions on the screen and click 'Add'.

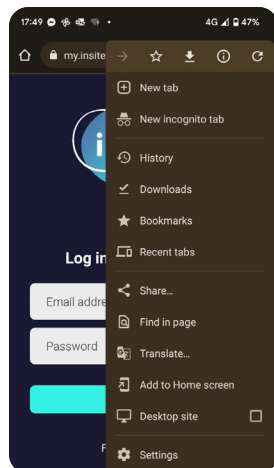


4 An app icon should now appear on your phone home screen.

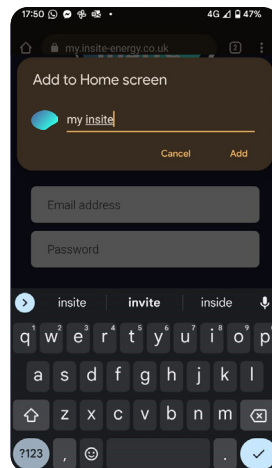
### For Android devices



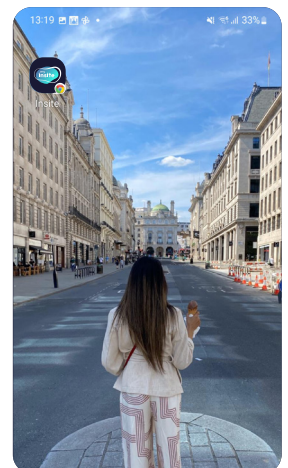
1 Type **my.insite-energy.co.uk** into Chrome and tap on the three dots (upper-right corner).



2 This will open a menu. Click on the 'Add to Home screen' or 'Install' option



3 Follow the instructions on the screen and click 'Add'.




4 An app icon should now appear on your phone home screen.

**⚠ Please note your device or operating system may differ from the above instructions. If so, please investigate the right method for your device.**



Insite Energy take care of metering and billing for heat network utilities across 30,000 homes nationwide on behalf of your heat provider. We connect to the energy meter in your property remotely, accurately measuring your consumption so you only ever pay for what you use.

 [www.insite-energy.co.uk/home](http://www.insite-energy.co.uk/home)

 [customerservice@insite-energy.co.uk](mailto:customerservice@insite-energy.co.uk)

 Insite Energy, Studio 4 Stuart House, St John's Street, Peterborough, PE1 5DD

Insite Energy is accredited with ISO 9001, CHAS, FCA, and help clients comply with Heat Trust Scheme Rules. We are also active members of multiple industry associations.



scan to visit  
our website



or visit

[www.insite-energy.co.uk/home](http://www.insite-energy.co.uk/home)