

# **DFS Unit Registration Providers Manual**

## **Single Market Platform Portal**

**Demand Flexibility Service**  
**October 22**

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# 0. Introduction

## 0.1. Document Purpose

The purpose of this document is to help readers access, navigate and use the Single Markets Platform (SMP) Portal to enable existing Balancing Service Providers and Agents market entry to engage in the Demand Flexibility Service. This currently includes the ability to register Units including the Versioning of Units and the ability to enter the Units for Pre-qualification.

This guide is designed as a supplementary resource to the main SMP External Guide.

## 0.2. Background to Demand Flexibility Service

The Demand Flexibility Service is a service which allows the ESO to access upwards flexibility (when additional flexibility is required to balance demand and generation), that is not currently accessible in real time. This will expand our ability to control output from providers that we cannot currently access through the Balancing Mechanism and the Platform for Ancillary Services. For more information on the Demand Flexibility Service please visit: <https://www.nationalgrideso.com/industry-information/balancing-services/demand-flexibility>

## 0.3. Supported Browsers

For the best experience, we recommend that the latest version of Google **Chrome** is used to access the portal, otherwise key functionality will not render on screen

We do not recommend any version of Internet Explorer as this site has not been designed to use this browser and therefore you may encounter errors.

## 0.4. Requirement for Use

Access to the internet and a phone to receive two factor authentication codes.

## 0.5. Disclaimer and Applicant's Responsibility

The information supplied with, contained in, or referred to in this Document, and all other information is given in good faith. However, no warranty or representation or other obligation or commitment of any kind is given by National Grid ESO, its employees or advisors as to the accuracy or completeness of any such information or that there are not matters material to the arrangements and matters referred to therein other than is contained or referred to in such information. Neither National Grid ESO nor its employees or advisors shall be under any liability for any error or misstatement or as a result of any failure to comment on any information provided by National Grid ESO or the recipient of the Documentation or any other person or any answers to any questions or for any omission and none of such information shall constitute a contract or part of a contract.

## 0.6. Help and Support

For any queries on registering and completing an application, these should be sent to [commercial.operation@nationalgrideso.com](mailto:commercial.operation@nationalgrideso.com). For any technical issues, you can contact the helpdesk on +44 800 917 7111.



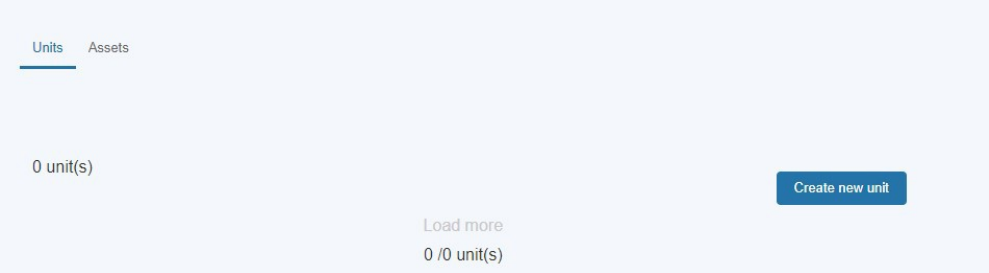
# 1. Creating & Managing Units

## 1.1. Create a Unit

To register a new Unit specifically for the Demand Flexibility Service, the first step is to click on the *'Create new unit'* where a user will be presented with the screen illustrated in Figure 1.1 'New Unit registration' where a unique Unit name will be required. Please note that firstly a Unit cannot be created without a Unit name and secondly the name must be **unique in naming convention to the Unit in question**. Once the Unit name is provided, the user will be able to progress to the next step by clicking **create**.

The Unit ID is not required.

**Figures 1.1: Create Unit**



### New Unit Registration

Choose the following details for your new Unit

\* Unit Name

Functional Test 1

Unit Id

Unit Id

Cancel

Create

## 1.2. Unit Registration: Unit Details Page

The user is navigated to the Unit Registration Page as outlined in Figure 1.2, the format is similar to the Registration Page structure for Balancing Services Unit(s) with an accordion section on the left-hand side for direct navigation to a specific section or the user can select the sub section they wish to complete.

The figure illustrates the unique named Unit for which the details are being registered; “*Functional Test 1*”

Please note that the user is not able to progress the registration process for a created Unit without completing all the sections and corresponding fields.

A new field entitled ‘Applicable Markets’ has been introduced to help portal users identify the specific Market the Unit is applying under. The option *Demand Flexibility Service* should be selected from the drop down. **Please ensure that this option is selected, otherwise an alternative set of fields will display that are only relevant to Unit’s applying under Balancing Services which are not relevant.**

The Unit can be identified as both Generation and/or Demand, however for the purposes of the Demand Flexibility Service, if Generation is checked, a corresponding default value of ‘0.00’ is set automatically on the ‘Generation Capacity’ Field as it is not a requirement. Alternatively if ‘Demand’ is checked then the portal user will be prompted to enter a value under the ‘**Demand Capacity**’ field. For details of the format for entry of the Demand Flexibility, please consult the Glossary of Terms.

Units applying under the Demand Flexibility Service are not expected to provide Fuel Type, hence the Value is set to ‘Load Response’ by default.

Figure 1.2: Unit Details Registration Detail Page

**New Unit Registration**

**Functional Test 1**

Complete all the information below in order to complete the registration of a new unit

1 Unit Details

2 Connection Details

3 Site Location

Unit Details

\*Applicable Market 1  
Demand Flexibility Service

\*Unit Type  
☒ Generation Unit  
☒ Demand Unit

\*Effective From Date  
26-Sept-2022

Fuel Type  
☒ Load Response

Connection Details

\* Generation Capacity 1  
0.00

\* Demand Capacity 1

## 1.3 Submitting Unit Information: Unit Details Section (cont)

Please note that the *Applicable Markets*, *Unit Type*, and the *Effective from Date* are all mandatory and therefore marked in a red Asterix. It is essential that these fields have information submitted.

**Figure 1.3: Unit Details Registration Detail Page**

**New Unit Registration**

**Functional Test 1**

Complete all the information below in order to complete the registration of a new unit

1 Unit Details

2 Connection Details

3 Site Location

Unit Details

\* Applicable Market ⓘ

Demand Flexibility Service ▼

\* Unit Type

☒ Generation Unit

☒ Demand Unit

\* Effective From Date

26-Sept-2022 📅

Fuel Type

☒ Load Response

Connection Details

\* Generation Capacity ⓘ

0.00

\* Demand Capacity ⓘ

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## 1.4 Submitting Unit Information: Unit Connection Section

The Demand Flexibility Service has an extra series of alternative fields to complete as illustrated in Figure 1.4 below. Under the Connection Section, only the existing '*Connection Type*' field is mandatory.

**Figure 1.4: Unit Details Registration Detail Page**

The screenshot displays the 'Connection Details' section of a registration form. It includes several input fields and a radio button group. The 'Connection Type' field is highlighted with a red rectangle.

▼ Connection Details

\* Generation Capacity ⓘ

0.00

\* Demand Capacity ⓘ

20

Customer Base/Unit Type ⓘ

Domestic ▼

Delivery Method ⓘ

\*Connection Type

☐ Firm

☐ Flexible

## 1.5 Submitting Unit Information: Unit Site Location Section

The Demand Flexibility Service only requires the fields illustrated in Figure 1.5 to be completed for a Unit with respect to Site Location details.

***Please ensure the Primary Despatch Phone Number is an operational phone with 24/7 coverage.***

Figure 1.5: Unit Site Location Registration

Site Location

\* Primary despatch phone number ⓘ

United Kingdom (44) ▼ 0127654678

\* Primary Despatch Email Address

\* Secondary despatch phone number ⓘ

United Kingdom (44) ▼ 0127654678

\* Secondary Despatch Email Address

Despatch fax number ⓘ

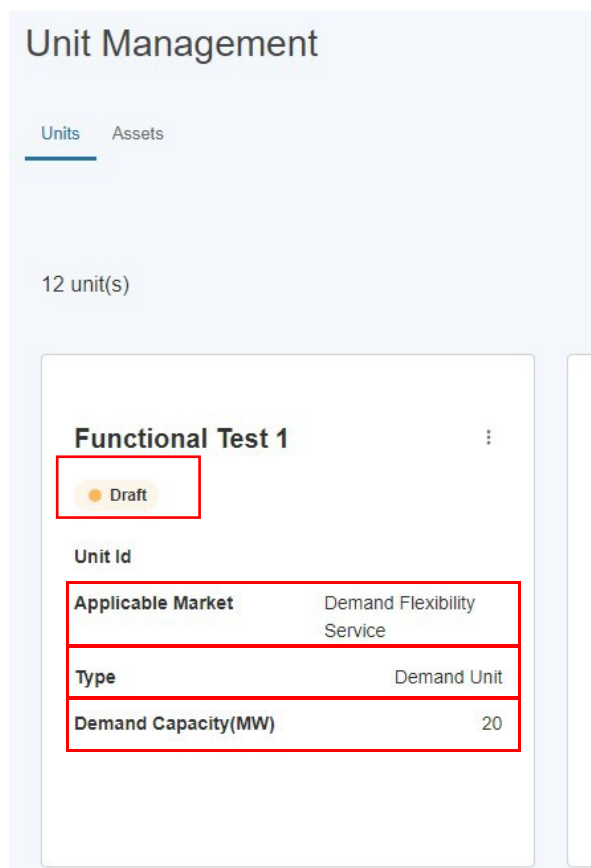
Select country code ▼

## 1.6 Submitting Unit Information: Confirmation of Submission.

Once all the sections are completed correctly, then the 'Save Unit' button will appear in a blue background, enabling the user to complete the registration process for creating the Unit, upon selecting it a green pop up notification will appear as a banner at the top of the page as confirmation of submission.

If the User wishes to repeat the exercise and create subsequent Units, they can select the 'save and create new one' button instead and repeat the cycle.

**Figure 1.6: Unit Tile.**



A summary overview of the newly created Unit will appear on the Unit Management landing page as illustrated in Figure 1.6 with headline data displayed including the Status of the Unit Registration set to 'Draft' – awaiting appraisal by a Contract Manager.



## 1.7 Modifications to Registration of Units

To view the full registration details, click on the **three dots on the right-hand corner of the tile**. The user then selects the **'View Unit Details'** link to be re-directed to the Unit Detail page expanded version.

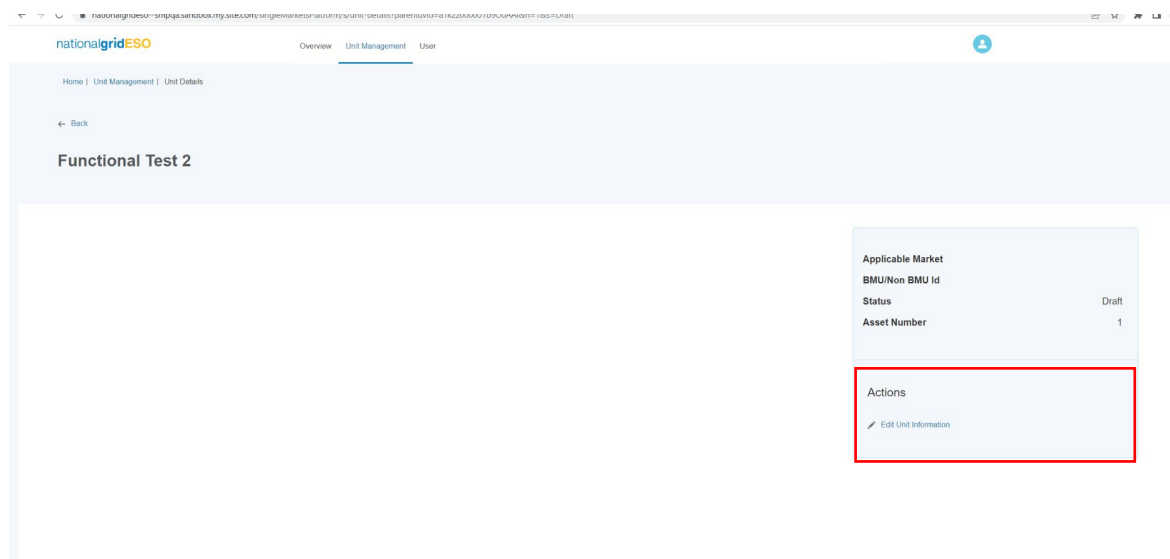
Users have the ability to retrospectively edit Unit Registration Details before final submission. Upon 'saving the Unit' registration details, the Unit Status will appear as 'Draft' automatically.

To make edits, the user should click on **'Edit Unit Details'** link to be re-directed to the Unit Detail page expanded version. They then have the ability to edit the sections or specific fields desired. The Unit Status will appear as 'Accepted' once the Unit has been appraised for consideration.

Once the Unit is submitted for approval, the NGESO Contract Management Team will a) assign the Unit a Unit ID (which will auto populate on the Unit Id field) b) set the Unit Status field from 'submitted' to 'approved' or 'rejected' and c) Assign a BMU NON BMU ID

An 'accepted' Unit cannot be modified.

**Figure 1.7: Edit Unit Details & View Expanded Unit Details Page for Editing**



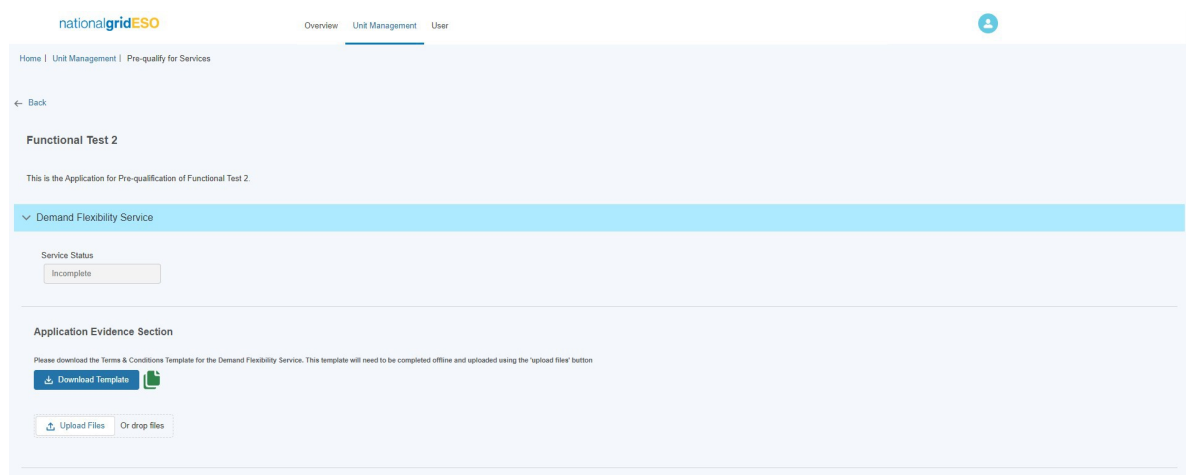
# 2 Prequalification for Services

## 2.1 Identifying Unit to participate in Pre-qualification

Once the Unit has been registered the user is in a position to elect the Unit for participation in the Demand Flexibility Service Market and subject to the pre-qualification process.

To start, the user must navigate to the selected unit tile on the Unit Management home page and hover over the right-hand corner of the Unit tile and click on the three dots on the Unit tile as highlighted in the Figure below. They will be prompted with the link '**pre-qualify for services**'

**Figure 2.1: Pre-qualify for Services Page**



The screenshot displays the 'nationalgridESO' portal interface. At the top, there are navigation tabs for 'Overview', 'Unit Management', and 'User'. The 'Unit Management' tab is active. Below the navigation bar, the breadcrumb trail reads 'Home | Unit Management | Pre-qualify for Services'. A 'Back' link is visible on the left. The main content area is titled 'Functional Test 2' and includes a sub-header 'This is the Application for Pre-qualification of Functional Test 2'. A blue bar indicates the 'Demand Flexibility Service' section. Below this, the 'Service Status' is shown as 'Incomplete'. The 'Application Evidence Section' follows, with a note: 'Please download the Terms & Conditions Template for the Demand Flexibility Service. This template will need to be completed offline and uploaded using the 'upload file' button'. It features a 'Download Template' button with a download icon and a green document icon. At the bottom of this section, there is an 'Upload Files' button with an upload icon and the text 'Or drop files'.

The user will then be presented with the Pre-qualify for Services Page as illustrated in Figure 2.1.

The pre-qualification screen for the Demand Flexibility has been streamlined as there are no pre-requisites for entry. The portal user is simply required to navigate to the 'Application Evidence' Section and undertake the following tasks;

1. **Download Template;** The Terms & Conditions Document for the Demand Flexibility Service is temporarily available to download a physical copy during the transition to a digital e-signature functionality pending in Release 2.0b across the SMP portal. The Document must be filled in and signed manually before being uploaded.
2. **Upload Files:** Once completed manually/offline, the Document must be uploaded prior to navigating to the Terms & Conditions Sub-Section.

## 2.2 Example of Template for Download



The image shows a screenshot of a form template for National Grid ESO. The header features the 'nationalgridESO' logo in the top left corner, with 'national' in blue, 'grid' in bold blue, and 'ESO' in orange. The background of the header is a solid yellow color with a wavy, organic shape on the left side. Below the header, the text 'Terms & Conditions' is displayed in a bold, orange font. Underneath this, the text 'DEMAND FLEXIBILITYSERVICE:' is shown in a bold, black font. A horizontal line separates this section from the registration details. The registration details are listed on the left side of the form, each followed by a horizontal line for input: 'Name of Registered Service Provider:', 'Country of incorporation:', 'Company number:', 'Registered office:', and 'Address for receipt of notices (if not R/O):'. Below these, the text 'Agent (if acting on behalf of above Registered Service Provider)' is shown in bold, followed by 'Name:' and another horizontal line for input.

**nationalgridESO**

**Terms & Conditions**

**DEMAND FLEXIBILITYSERVICE:**

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**Name of Registered Service Provider:**

Country of incorporation:

Company number:

Registered office:

Address for receipt of notices (if not R/O):

**Agent (if acting on behalf of above Registered Service Provider)**

Name:

## 2.3 Uploading Completed Template

▼ Demand Flexibility Service

Service Status

Incomplete

Application Evidence Section

Please download the Terms & Conditions Template for the Demand Flexibility Service. This template will need to be completed offline and uploaded using the 'upload files' button

Download Template

Upload Files

Or drop files

## 2.4 Confirmation of Upload Completed

service.

Upload Files

Upload Contract DFS.jpg 48 KB

1 of 1 file uploaded

Done

## 2.5 Completion of Pre-qualification Criteria: Terms & Conditions Section

The step preceding final submission involves completing the Service Specific Terms & Conditions Checkboxes.

To access the Service Specific Terms & Conditions Documentation, the user is provided with a hyperlink illustrated in 2.5

To complete the Pre-qualification process, the user must click on the **'Submit'** button. This will appear in blue in its activated state. In order to proceed to this step, the two checkboxes must be checked and the hyperlink visited to consult the specific Ts&Cs for the Demand Flexibility Service.

In this instance, the NGENO Contract Manager will be notified and undertake an internal appraisal of the application for the selected Unit and Service.

The Status Field will switch from 'Incomplete' to 'Submitted' and once the Unit has been appraised if approved, the status will switch to 'Approved', accompanied by an email notification to the portal user (applicant). Conversely, if the Unit has failed pre-qualification an email notification with the 'rejected' outcome will be sent and the status field will be updated accordingly. In this instance, the Contract Management Team will liaise with the Provider directly to evaluate the application.

**Figure 2.5: Services Specific Terms and Conditions**

Application Evidence Section

Please download the Terms & Conditions Template for the Demand Flexibility Service. This template will need to be completed offline and uploaded using the "upload files" button

[Download Template](#)

[Upload Files](#) Or drop files

DPS Test

**Terms & Conditions Section**

Please make sure to read the documents available at [this link](#)

☒ I have read the documents provided.

☒ I agree to the terms & conditions.

[Submit](#)

## 3 Unit Versioning

### 3.1 What is Versioning?

A Unit is subject to versioning when it requires a change or modification to its properties or to a change or modification to its composition of asset(s). Examples include and not limited to;

- An Increase or Decrease in Capacity
- Change in Agent or Registered Service Provider

For the Demand Flexibility Service the *Versioning Process* is only applied to the *Unit*.

A Unit can be subject to multiple iterations of Versioning during its lifetime. For example, a Unit can require several changes over time and each change will constitute a case for Versioning – therefore one Unit within a provider's portfolio may have 1 Version whilst another may have 10 or more.

### 3.2 Why is Versioning is needed?

- The main rationale for introducing Versioning on the SMP Portal is to keep track of changes of a Unit over time which are documented and available for the Contracts Team to monitor for auditing purposes as well as recording the history of a Unit as it evolves or changes during its lifetime. Essentially, when changes are made to the Unit, a cloned copy of the original record is produced with the original retaining its original properties, allowing a new version (cloned) to be subject to modifications or updates by the Portal User(s).
- Moreover, 'related' or supplementary records linked to the Unit will also be cloned automatically. For example, if the origin Unit has a pre-qualification 'application' attached, the application record will also be cloned – critically retaining the Status at the point of Versioning
- It is important to note that with the introduction of User Roles, all Records including those Versioned will be available to view and edit or manage exclusively by User(s) with the "Unit Manager" Role assigned to their User Record/Profile by their respective Super User. For more on User Roles please consult the main SMP External User Guide.
- It is recommended that only one user at any one time is solely responsible for undertaking the task of Versioning a Unit.
- For the purposes of the Guide, the naming convention will run as follows; the origin Unit will be referred to as Version 1.0 and the second iteration of the Unit will be referred to as Version 2.0. Any subsequent iterations will follow the same logic, so a third version will be referred to as 3.0

### 3.3 What types of Versioning apply to Units?

- In the instance of the Demand Flexibility Service, a Unit will exclusively be subject to **'automatic' versioning**.
- The purpose of Automatic Versioning is simply to keep an audit trail of the Unit's changes and original properties/details/data. This requires no intervention on the part of the portal user beyond providing the initial update to the Unit, subsequently enabling the automatic creation of the latest Unit Record and changing the Status of the origin or predecessor record to 'Versioned'.
- The section overleaf outlines the steps required to initiate automatic versioning on a Demand Flexibility registered Unit.

## 3.4 Automated Versioning Process

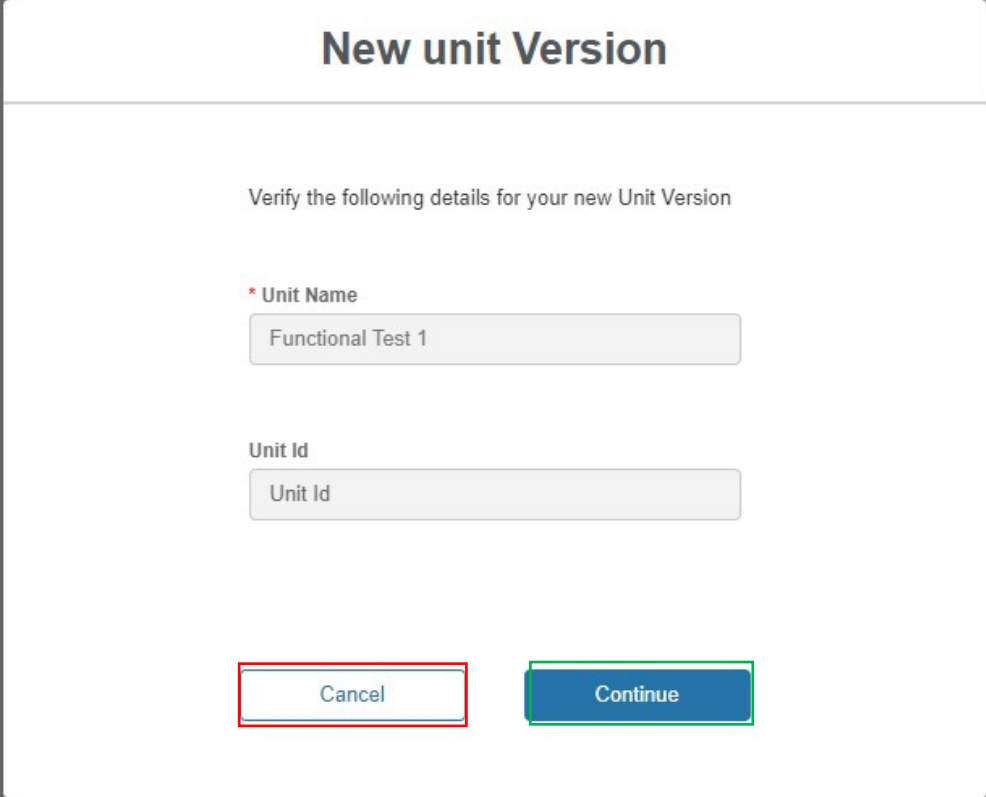
### 3.4.1 Selection of Unit to Version

- Portal User (with the Unit Manager Role) navigates to Unit listed under the Unit Tab of the Unit Management Screen Page
- The pre-requisite is that the Unit must be display the **'Accepted' Status**. This signifies that the original Unit has already been appraised and vetted by the Contracts Management Team
- Navigate to the top-hand right corner of the tile for the Unit (3 linear dots) and click. Three options are presented – select the third option *'Create New Version'*

### 3.4.2 Revision to Unit Details

- A pop up screen will appear. Please note that as of Release 2.0 there is a lag or delay of a couple of seconds for the screen to load. Avoid refreshing the page, as a duplicate Version could accidentally be created. This will be remedied in Release 2.0a.
- Please ensure that the portal user is using Google Chrome to undertake this task.
- A compact screen will display pre-populated with the Unit Name and Unit Id as illustrated in Figure 3.4.2
- There is the option to cancel the step if Versioning is no longer required by selecting the Cancel button. This is currently the only opportunity to undertake this step. If a decision is taken to nullify a 'versioned' record post creation, then the portal user must approach the Contract's Management Team with details of the Unit via email communication to rectify the issue.
- Select 'Continue' to proceed with the process of enabling the next step.

Figure 3.4.2: Revision to Unit Details Screen



**New unit Version**

Verify the following details for your new Unit Version

\* Unit Name  
Functional Test 1

Unit Id  
Unit Id

Cancel Continue

### 3.4.3 Update/Revision to Unit Details

- A secondary pop up screen will appear. This will resemble the format of the original Unit Registration. The portal user will be presented with pre-populated field values based on the original Unit information. The portal user will be expected to update the relevant fields. Once again, all fields marked in a Red Asterix are mandatory and it will not be possible to proceed with 'Save Unit' if these fields are left blank.
- The critical feature of Versioning is the use of '*Effective Dates*'. Versions run in succession and adjacent to one another. There cannot be an overlap of two versions of a Unit at any one time.
  - *For example*, Version 1.0 (origin Unit) is available to operate between 1<sup>st</sup> August 2021 to 31<sup>st</sup> August 2022. Version 2.0 (next iteration of origin Unit) can

only be effective from **a minimum of a day after Version 1.0's effective to date** – therefore Version 2.0 is available to operate from 1<sup>st</sup> September 2022.

- The *Effective from Date* is therefore essential to enter as part of the Update/Revision to the Unit Details and a portal user will not be able to progress without entering a date.
- It is expected that as it pertains to the Demand Flexibility Service - the key field that are subject to revision/updates are under the Unit Details Section;

*Unit Type, Delivery Method, Customer Base or Primary and/or secondary dispatch email addresses*

It is expected that in Release 2.0 the key fields that are subject to revision/updates are under the Connection Details Section;

*Demand Capacity*

- Once the updates are made, the Portal User should select 'Save Unit' to complete the process of generating a secondary version of the Unit

**Figure 3.4.3.1: Revision to Unit Details Screen**

### Update Unit Information

**Functional Test 1**

Complete all the information below in order to update the existing unit

1 Unit Details

2 Connection Details

3 Site Location

Unit Details

Applicable Market ⓘ

Demand Flexibility Service ▼

\* Unit Type

☐ Generation Unit
 ☒ Demand Unit

\* Effective From Date

Effective From Date

Fuel Type

☒ Load Response

Connection Details

\* Demand Capacity ⓘ

20

Customer Base/Unit Type ⓘ

Domestic ▼

Delivery Method ⓘ

\* Connection Type

☐ Firm
 ☒ Flexible

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Customer Base/Unit Type ⓘ

Domestic ▼

Delivery Method ⓘ

Empty Text 2

\* Connection Type

☐ Firm

☒ Flexible

▼ Site Location

\* Primary despatch phone number

United Kingdom (44) ▼

0127654678

\* Primary Despatch Email Address

\* Secondary despatch phone number

United Kingdom (44) ▼

0127654678

\* Secondary Despatch Email Address

Despatch fax number

Select country code ▼

Update and create new one

Update unit

3.4.5 Post Unit Versioning

Once the Unit has been updated, the portal user is automatically navigated to the Unit Management Landing Page where the Unit Tile for both the Versioned ( Version 1.0) and the Accepted (Version 2.0) records are displayed adjacent to each other. As previously mentioned, as a result of automated versioning – the 'latest' version of the Unit is automatically set to 'Accepted' for the Demand Flexibility Service.

As illustrated in the example below, the Unit was subject to versioning due to an increase in Demand Capacity from 20 to 50 MW.

Unit Management

Units

Assets

12 unit(s)

Functional Test 1

Accepted

Unit Id

Applicable Market

Demand Flexibility Service

Type

Demand Unit

Demand Capacity(MW)

50

Functional Test 1

Versioned

Unit Id

Applicable Market

Demand Flexibility Service

Type

Demand Unit

Demand Capacity(MW)

20

## 4. Glossary of Terms

Term	Description
Account	A Salesforce account.
Delivery Method	The means in which you (provider) will instruct assets and/or consumers to reduce their energy consumption
Demand Flexibility Services Provider	A market participant as defined by the Electricity Balancing Guidelines who is NGESO's counterparty to Demand Flexibility Services Contract.
Connection Type	This can be Firm or Flexible.
Demand Capacity	In relation to the DFS Unit, the maximum Demand Reduction Volume capable of being delivered as Demand Flexibility. The value can range from 1MW to 100MW (only whole numbers)
Customer Base	Either 'Domestic' or 'Industrial and Commercial (I&C)', as more particularly described in Schedule 3 of the DFS Procurement Rules.
Effective from Date	The date that an asset is live and connected to the Grid.
Pre-qualification for Services	Process of submitting data and evidence for a unit requesting approval for participation for a particular service.
Primary Despatch Telephone Number	A 24/7 phone number that will be the primary method used to contact a provider regarding unit despatch.
User	Registered user of SMP.



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