

How to Create and Manage a New Application

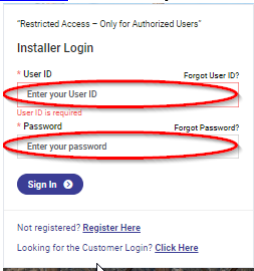
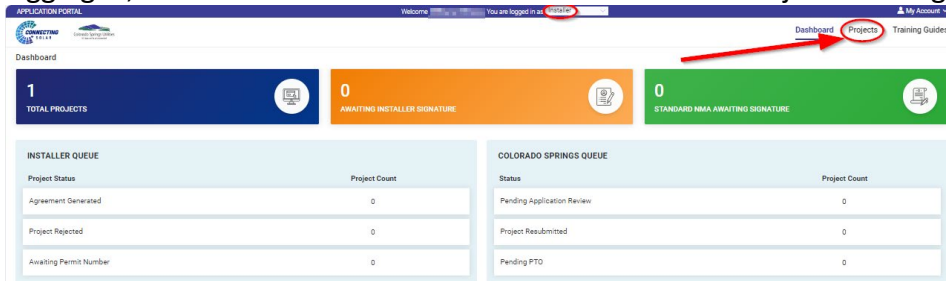
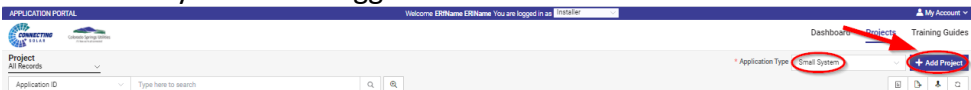
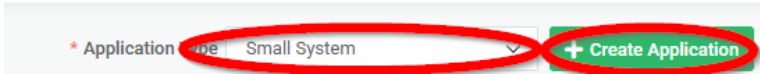
**Description:** If your company is registered with eTRACK+, this guide provides instructions on how to create and manage an installation application for solar or energy storage systems.

Section Links:

- [Creating a New Application](#)
- [Editing and reviewing applications](#)
- [Account and User Management](#)
- [Viewing Projects/Applications](#)

Create a New Application

Quick Reference Guide

Step	Action
1. Sign in to Your Account	<p>From the <a href="#">Installer Page</a> or <a href="#">Dashboard</a>, enter your User ID and Password</p> 
2. Start a New Project	<p>If you receive an error, check for spacing before or after your User ID and Password.</p> <p>After logging in, the dashboard is the default screen. Click on "Projects" to begin.</p>  <p>Ensure you have the "Installer" role to create a new project. Verify this at the top center where it says "You are logged in as."</p> 
3. Create a new application.	<p>Select "Small System" and click on the plus (+) to Add New.</p> 

#### 4. Completing the Required Information

Fill in each tab and all fields marked with an asterisk (\*). Progress from "Customer" through "Document."

Click "Save" **before** clicking "Continue" to move to the "General" tab.

Errors will prevent you from progressing. Ensure data is consistent with the billing account and meets field requirements.

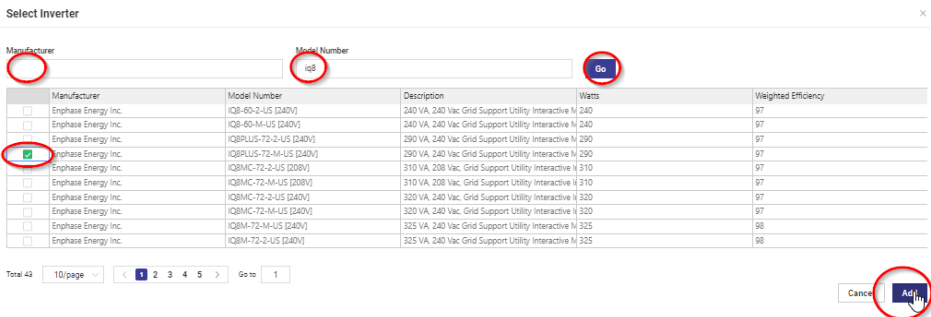
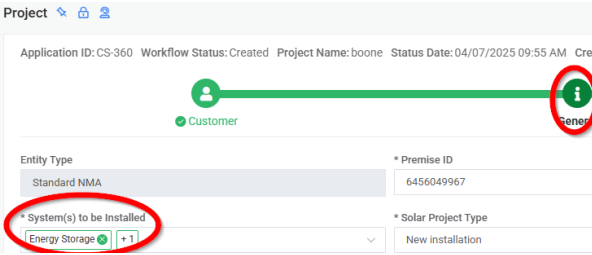
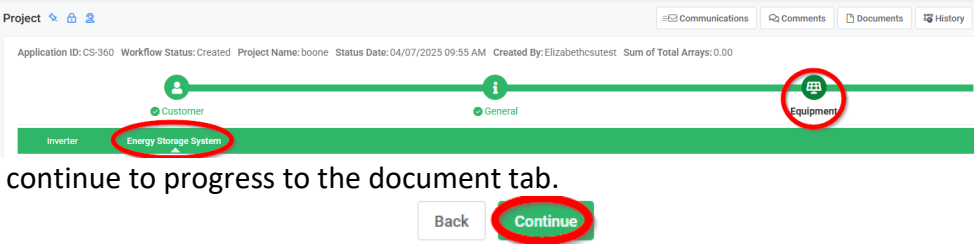
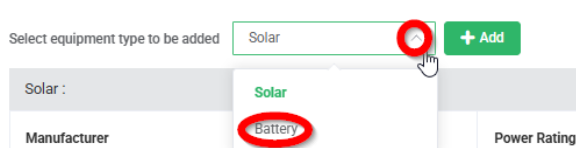
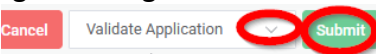
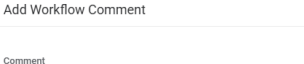
- Errors**
- Please enter the 10-digit Utility Account Number
  - Please enter the Service Type
  - Please Enter Meter Number
  - Please enter the Last Name/Business Name
  - Please enter Street Number
  - Please enter Street Name
  - Please enter the Customer's Zip Code
  - Please enter the Customer's Email Address
  - Please enter a valid 10-digit Phone Number
  - Please enter Complete Address in the Mailing Address Section
  - Please enter the Zip Code in the Mailing Address Section
  - Please enter City in the Mailing Address Section
  - Please enter State in the Mailing Address Section

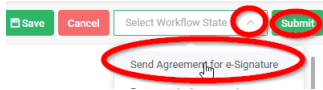
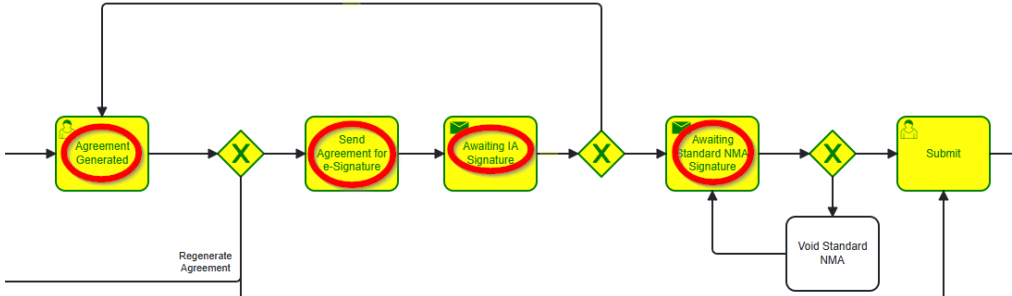
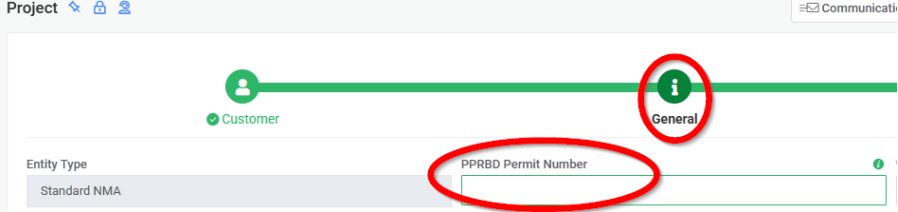
Clicking save verifies the customer information in the account and takes a few moments. Please be patient.

#### 5. Adding Equipment.

For Solar PV systems the inverter selection is the first requirement.

Click "+New" in the Inverter screen to open the dialog box. Use the magnifying glass to search.

	 <p>Enter the manufacturer or model, then click "Go." Select the appropriate item from the list and check the box to add it.</p>
6. Adding Energy Storage equipment	<p>Two options AC or DC energy storage. For AC click on the “Energy Storage System” heading. This is required if you selected energy storage in “systems(s) to be installed” of the general tab.</p>  <p>Select “Energy Storage System” to add the AC battery.</p>  <p>Click continue to progress to the document tab.</p> <p>DC energy storage/battery is in the solar PV section. In the inverter section at the bottom click on “Select equipment to be added” and select battery.</p> 
7. Adding Documents	<p>Follow the prompts to upload necessary documents and attachments. A minimum of six (6) documents are required to complete the submission.</p>
8. Submit the application	<p>Click “Submit” to save the documents to the application. Then click “Validate Application” and “Submit” again to begin the review.</p> 
9. Optional comments	<p>Enter an optional comment or leave blank and click “save.” The comment is viewable after the submission. The system will then process the request. Three green dots will appear to indicate the system is working.</p> 

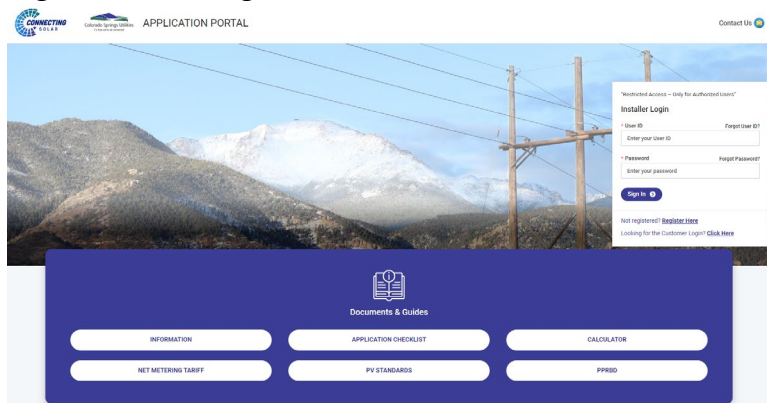
10. E-signature	<p>Select “send Agreement for e-Signature.” A dialog box for option comment will appear.</p>  <p>The forms will generate and email to you, the installer, for electronic signature. You will receive an email from “ANB” stating the application has been saved. Then, an email from “Right Signature” requesting the signature. Then, the customer will receive two documents for signature, each requires a signature to proceed. Sign the document within 24 hours to avoid the link expiring.</p> 
11. PPRBD permit	<p>After application approval. Apply with Pikes Peak Regional Building Department, PPRBD for a permit. Once received, log in to the portal and enter the permit number in the general tab. Click “Submit.”</p> 
12. PTO Process	<p>To obtain Permission to Operate, PTO, each of the previous steps are required. PTO is triggered on the PPRBD permit number. Verification of the ES=complete is verified with the permit number.</p>

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## Editing and Reviewing Applications

Step	Action
1. Logging In to Your Account.	<ol style="list-style-type: none"> <li><b>Log in to Your Account</b> <ul style="list-style-type: none"> <li>The login page contains important guides and information related to the interconnection process.</li> <li>Enter your registered User ID and chosen Password.</li> <li>If you forget your User ID or Password, use the respective links to reset the password.</li> </ul> </li> <li><b>Customer Self-Installer Registration</b> <ul style="list-style-type: none"> <li>Follow the administrative registration steps to create your own installer login.</li> </ul> </li> </ol>

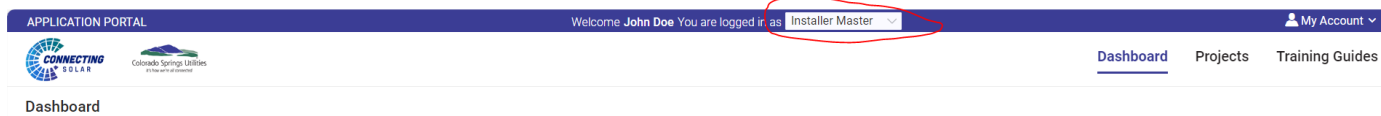
- For documents completed by your installer, navigate to the Customer Login Page. Your User ID is the email address associated with your Colorado Springs Utilities billing account.



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## Account & User Management

Types of Accounts in eTRACK+:

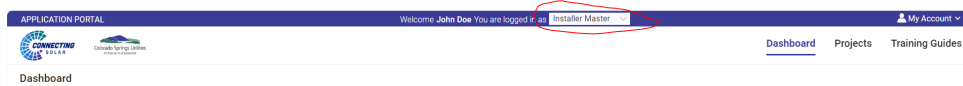


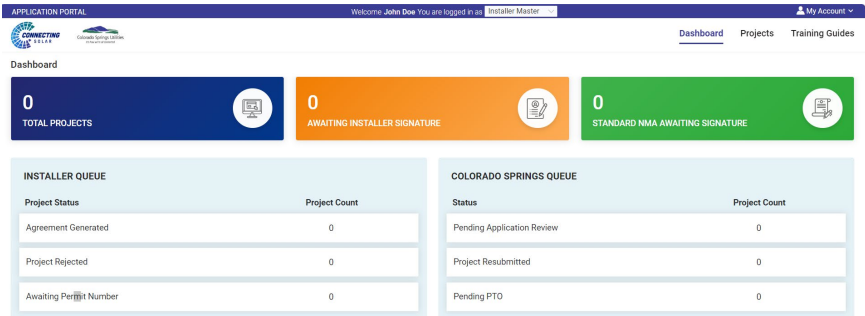
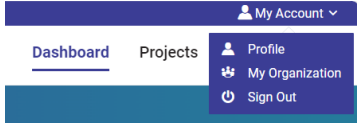
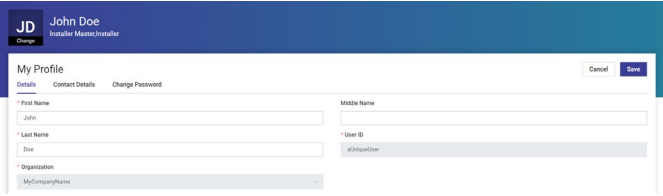
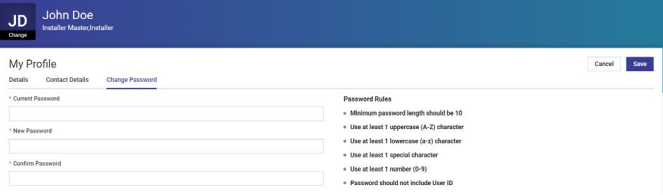
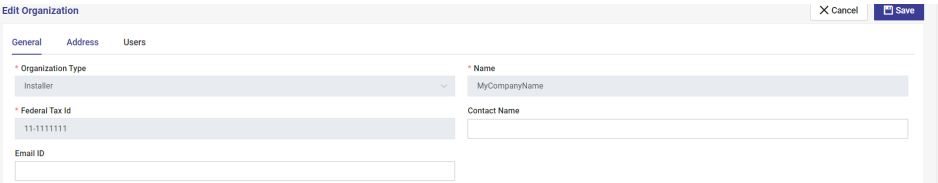
### 1. Installer Master

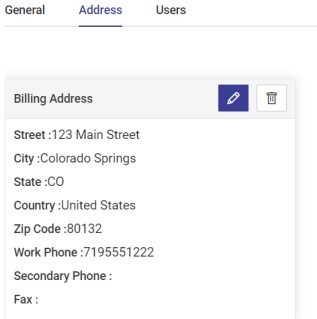
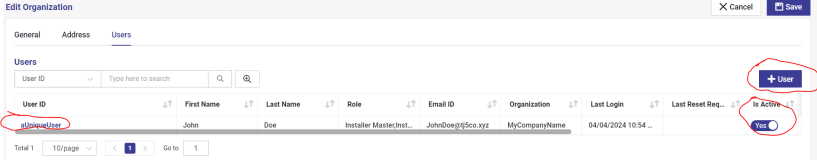
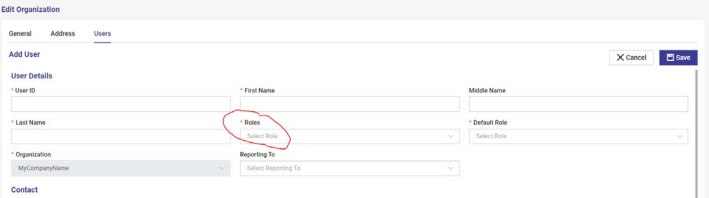
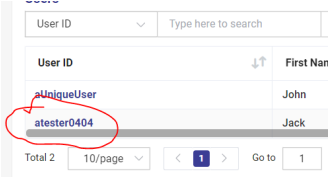
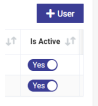
- The first employee registering for the company user ID becomes the Installer Master, who acts as the company administrator.**
- Responsibilities include managing the company profile, user profiles, adding/deactivating users, and viewing all applications within the company.**

### 2. Installer

- Can manage their own profile, create and submit applications, and view all applications within the company.**

Step	Action
1. Setting up Your Role	<p>Users with both Installer Master and Installer access will default to "Installer Master" upon logging in.</p>  <p>Dashboard</p> <p>To change roles, select the appropriate value from the dropdown menu.</p>
2. User Dashboard.	<ul style="list-style-type: none"> <li>Displays a summary of interconnection applications and statuses.</li> </ul>

	<ul style="list-style-type: none"><li>Installer Masters see the quantity of each category for all installers in the company</li></ul> 
<p>3. User profiles</p>	<p>To view or modify your profile, select "Profile" in the "My Account" link in the upper right corner.</p> <p><i>Note, "My Organization" link will only appear for Installer Masters.</i></p>  <p>Modify non-greyed fields in the Details and Contact Details by typing over and selecting save.</p>  <p>You may change your password from Change Password tab.</p> 
<p>4. My Organization (Installer Master Only).</p>	<p>Installer Masters can also access the "My Organization" link to manage company information and users.</p> 

		
5. Managing Users <i>(Installer Master Only).</i>	Installer master/administrator may add, modify, or deactivate users.	
6. Adding a User <i>(Installer Master Only).</i>	<p>Company administrators are responsible for managing the profiles in their organization. Only one administrator should register for the account via the instructions in the Account Registration section above. Add all other users (Installers) for the company via the portal.</p> <ol style="list-style-type: none"> <li>1. Select "+User" and enter the required information.</li> <li>2. Assign Installer Master and/or Installer roles as needed.</li> </ol>  <ol style="list-style-type: none"> <li>3. Click "Save." The new user can then set their initial password via the "forgot password" link.</li> </ol>	
4. Modifying a User <i>(Installer Master Only).</i>	Click the username and update the desired fields.	
5. Deactivating a User <i>(Installer Master Only).</i>	Instead of deleting users, deactivate them by toggling the "Is Active" slider to "No."	 <p><i>This ensures that installers applications are still available to the organization</i></p>

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## Viewing Projects/Applications:

- Under the "Projects" tab, both Installer Masters and Installers can view projects.

Application ID	Project Name	Workflow Status	Created At	Updated By	Updated At	Created By	Status Date	Address
CS-69	LJUTEST0403	PTO Issued	04/03/2024	Lutherctest	04/03/2024	Ifjinstaller0312	04/03/2024 10:26 AM	12345 Broad Street
CS-68	Testing Project 1	Project Resubmitted	04/02/2024	Ifjinstaller0312	04/02/2024	Ifjinstaller0312	04/02/2024 12:00 PM	12345 Main Street
CS-67	--	Created	04/02/2024	Ifjinstaller0312	04/02/2024	Ifjinstaller0312	04/02/2024 11:32 AM	--
CS-65	LJUTEST 20240402	PTO Issued	04/02/2024	Lutherctest	04/02/2024	Ifjinstaller0312	04/02/2024 10:03 AM	123 Main Street

- Installer Masters can view but not edit any application in their organization.
- Installers can view or edit applications they have created.

### When viewing an application:

Step	Action
1. Current Status	<p>The tab will update to green as you progress through the application.</p>
2. Multiple installers	<p>Customers may choose multiple installers and have two or more applications in the system for the current solar energy system. The customer will receive an email to choose the installer they are moving forward with for the solar energy system. The customer is required to choose one installer to proceed with.</p>
3. Comments	<p>Displays all workflow steps, associated time, and comments.</p>
4. eSignature	<p>Shows the history of eSignatures for the application.</p>



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