How to Create and Manage Your Connecting Solar Portal Account
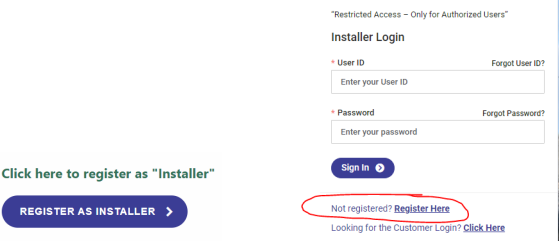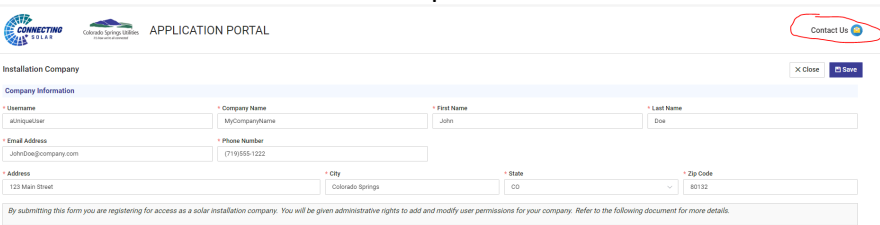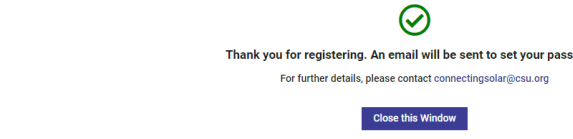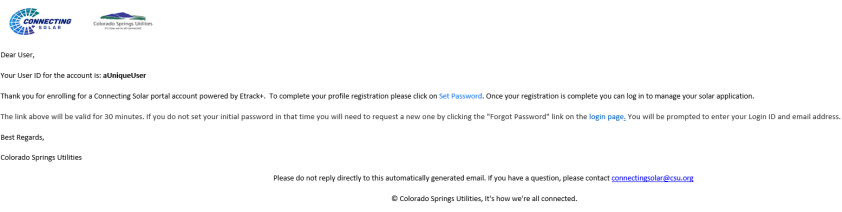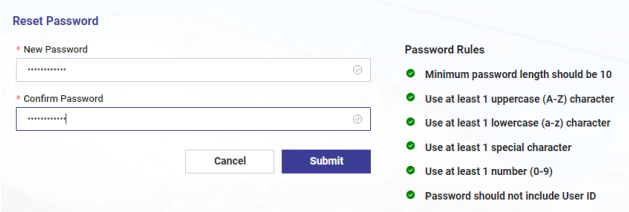
Description: This guide provides instructions on how to register for an account in eTRACK+, sign in, and update permissions for individuals within your company. Setting up an installer master/administrator to review and manage company contacts is the first and crucial step. If your company is registered with eTRACK+, the account administrator will set up access for individuals within your organization. If you are not the administrator and have a USERID set up by the administrator, skip to "Logging in." DO NOT register using the account registration method.

Section topics:

Quick Reference Guide

Account Registration
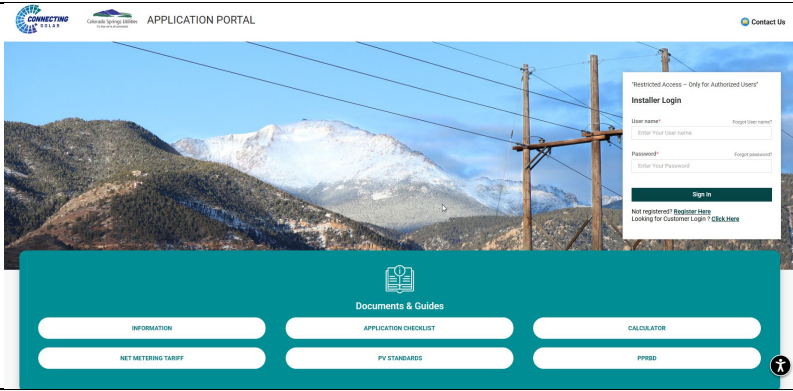
Step	Action
1. Csu.org solar website	Navigate to the installer page on the Utilities Connecting Solar website. Solar customer information **Solar installer information** Proper installation of solar systems is important for the safety of our community and the success of your business. **Steps to apply to install a solar system** Follow the steps below to ensure a smooth installation process: 1. Register, the log in to the Connecting Solar portal *https://www.csu.org/solar-energy-program*
2. Connecting Solar Customer Portal website.	From the Installer Page or Dashboard, select the "Register as Installer" button or click "register here." "Restricted Access – Only for Authorized Users" **Installer Login** * User ID Forgot User ID? Enter your User ID * Password Forgot Password? Enter your password **Click here to register as "Installer"** Sign In ❯ REGISTER AS INSTALLER ❯ Not registered? Register Here Looking for the Customer Login? Click Here *https://csu-installerportal.anbetrack.com/*
3. Complete the required fields.	Each eTRACK+ user must have a unqiue email address. CONNECTING SOLAR Colorado Springs Utilities APPLICATION PORTAL Contact Us ⊕ Installation Company ✕ Close 💾 Save Company Information * Username: alUniqueUser * Company Name: MyCompanyName * First Name: John * Last Name: Doe * Email Address: JohnDoe@company.com * Phone Number: (719)555-1222 * Address: 123 Main Street * City: Colorado Springs * State: CO * Zip Code: 80132 By submitting this form you are registering for access as a solar installation company. You will be given administrative rights to add and modify user permissions for your company. Refer to the following document for more details.

Quick Reference Guide

| Step	Action
	Selecting the Contact Us icon will open a web form to submit questions to support staff.
4. Click the Save button.	You will receive a popup confirming your registration. You may now close the tab or window. ✓ **Thank you for registering. An email will be sent to set your password.** For further details, please contact connectingsolar@csu.org [Close this Window]
5. Set your password.	You will receive an email from eTRACK+ containing a link to setup a password. If you do not receive the link, check your spam, or junk folders. Dear User, Your User ID for the account is: aUniqueUser Thank you for enrolling for a Connecting Solar portal account powered by Etrack+. To complete your profile registration please click on Set Password. Once your registration is complete you can log in to manage your solar application. The link above will be valid for 30 minutes. If you do not set your initial password in that time you will need to request a new one by clicking the "Forgot Password" link on the login page. You will be prompted to enter your Login ID and email address. Best Regards, Colorado Springs Utilities Please do not reply directly to this automatically generated email. If you have a question, please contact connectingsolar@csu.org © Colorado Springs Utilities, It's how we're all connected. **Click the link and enter your account password and click Submit.** **Reset Password** * New Password •••••••••• * Confirm Password •••••••••• [Cancel] [Submit] **Password Rules** ● Minimum password length should be 10 ● Use at least 1 uppercase (A-Z) character ● Use at least 1 lowercase (a-z) character ● Use at least 1 special character ● Use at least 1 number (0-9) ● Password should not include User ID **You will receive a confirmation email indicating your registration was successful.**

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Logging in

Step	Action
1. Logging In to your account.	The login page contains important guides and information related to the interconnection process and the login widget. ● Enter the Username that was registered or provided by your administrator. ● Enter the Password you chose. ● If you forget your Username or Password, select the respective link to the right and follow the directions to reset.

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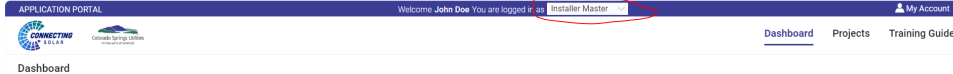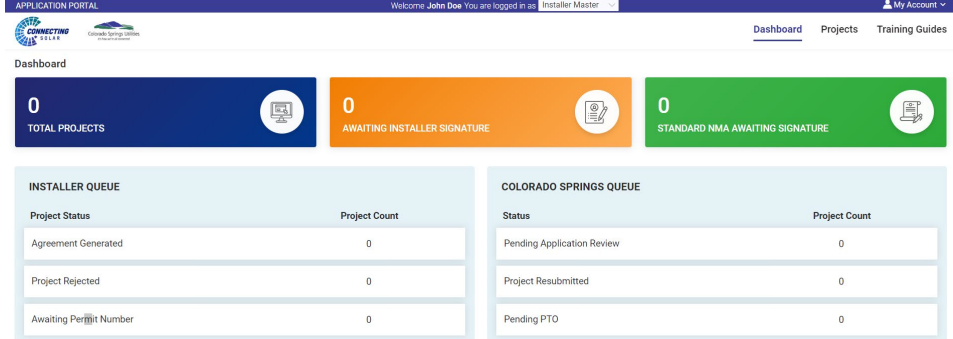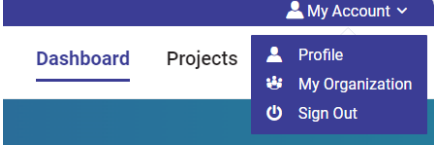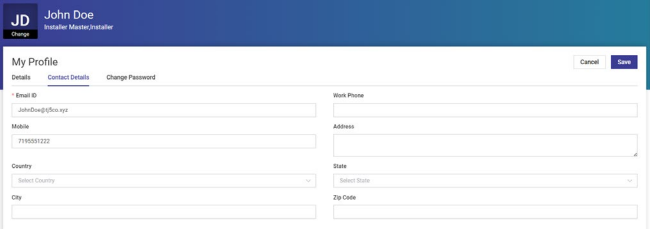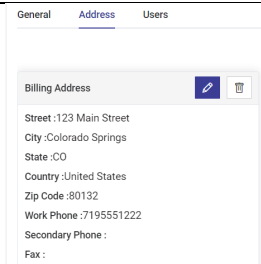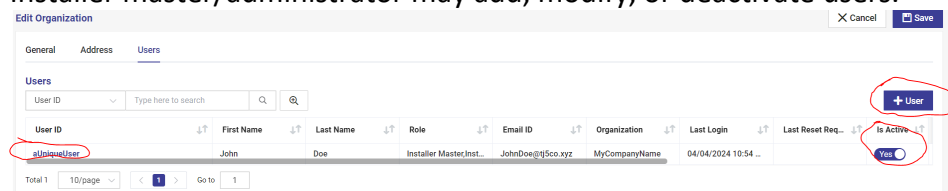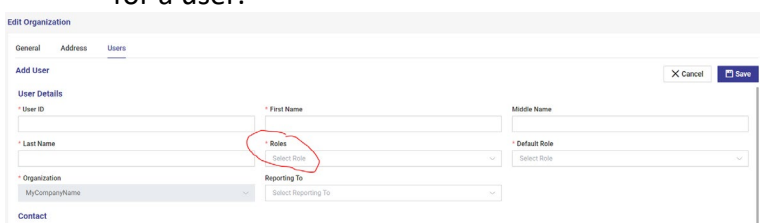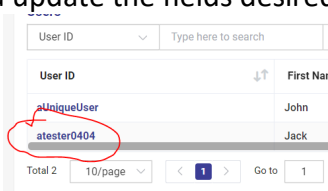|	
2. Customer documentation view.	• If a customer is looking for documents completed by the installer, please have them navigate to the Customer Login Page. Their Username is the email address associated with their Colorado Springs Utilities billing account (not the "My account" portal).
3. Customer self-installer set up.	• Follow the customer registration steps to create an application to install a solar energy system.

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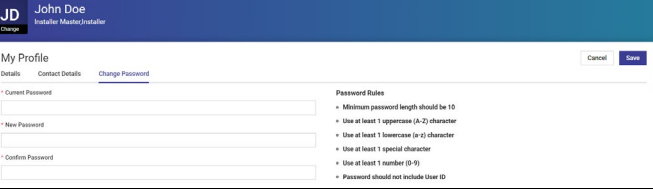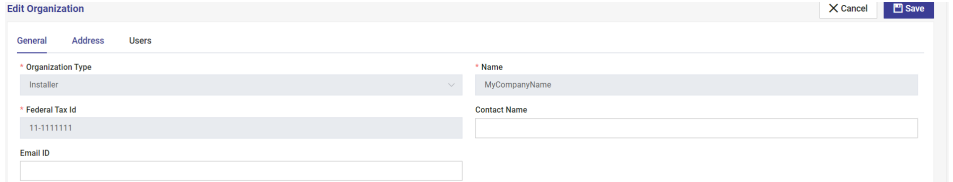
Account & User Management

There are two types of installer accounts available in eTRACK+. The first employee registering for the installation company is the Installer Master. The Installer Master is the company administrator and will create and manage installer roles by entering and updating all the installation company's employees.
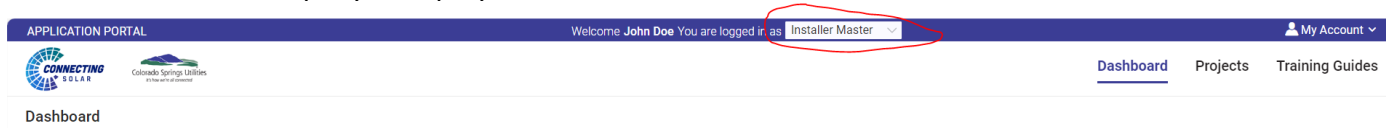
- **Installer Master** can:
  - Manage the company profile.
  - Manage the profile of company users.
  - Add and deactivate company users.
  - View all applications for users in their company.
- **Installer** can:
  - Manage their own profile.
  - Create and submit applications.
  - View all applications for users in their company.

Step	Action
1. Selecting Your Role	For users with both Installer Master and Installer access, select your role depending on the tasks you wish to complete. These users will

		default to "Installer Master" when logging in. To change your role, select the appropriate value from the dropdown.
2.	User Dashboard.	The dashboard shows a list of interconnection applications and statuses. If you are in the Installer Master role, the quantity of each category is the sum of all installers in your company.
3.	User profiles	To view or modify your profile, select "Profile" under the My Account link in the upper right corner of the application. Note, the "My Organization" link will only appear for Installer Masters. Modify non-greyed fields in the Details and Contact Details by typing over and selecting save. You may change your password from the Change Password tab.
4.	My Organization *(Installer Master Only).*	An Installer Master may change the company information including the profile, company address, and manage company users.

		General Address Users Billing Address ✏ 🗑 Street :123 Main Street City :Colorado Springs State :CO Country :United States Zip Code :80132 Work Phone :7195551222 Secondary Phone : Fax :
5.	Managing Users *(Installer Master Only).*	Installer master/administrator may add, modify, or deactivate users. Edit Organization ✕ Cancel 💾 Save General Address Users Users User ID ⌄ Type here to search 🔍 ⊕ + User User ID	First Name	Last Name	Role	Email ID	Organization	Last Login	Last Reset Req...	Is Active aUniqueUser John Doe Installer Master,Inst... JohnDoe@tj5co.xyz MyCompanyName 04/04/2024 10:54 ... Yes ⬤ Total 1 10/page ⌄ ‹ 1 › Go to 1
6.	Adding a User *(Installer Master Only).*	Company administrators are responsible for managing the users 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. To add: 1. Select "+User." **+ User** 2. Enter the required information. a. You can provide Installer Master and/or Installer roles for a user. Edit Organization General Address Users Add User ✕ Cancel 💾 Save User Details * User ID	* First Name	Middle Name * Last Name	* Roles Select Role ⌄	* Default Role Select Role ⌄ * Organization MyCompanyName ⌄	Reporting To Select Reporting To ⌄ Contact 3. Select "Save." 4. The system will automatically send the new user an email to set their password. If the initial email isn't accessed within the required time the user can navigate to the installer login page and select "forgot password" to receive a new email link to set their initial password.
5.	Modifying a User *(Installer Master Only).*	Click the username and update the fields desired. User ID ⌄ Type here to search User ID ↓↑	First Nam aUniqueUser John atester0404 Jack Total 2 10/page ⌄ ‹ 1 › Go to 1
6.	Deactivating a User *(Installer Master Only).*	Users are not deleted since they may have applications associated with their Username. Instead, the Installer Master should deactivate them by toggling the "Is Active" slider to "No."

Viewing Projects/Applications

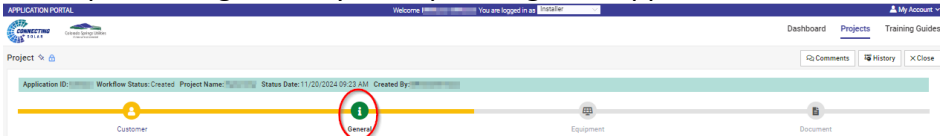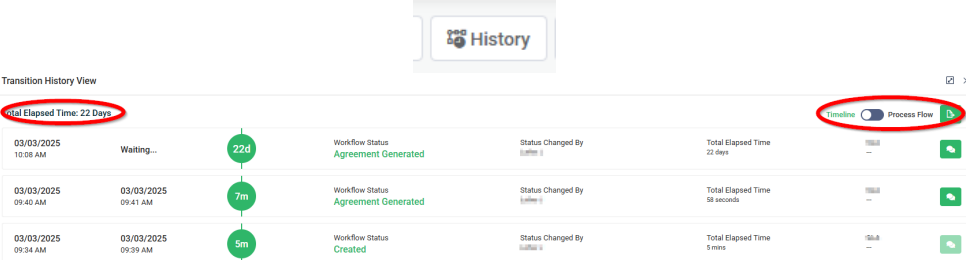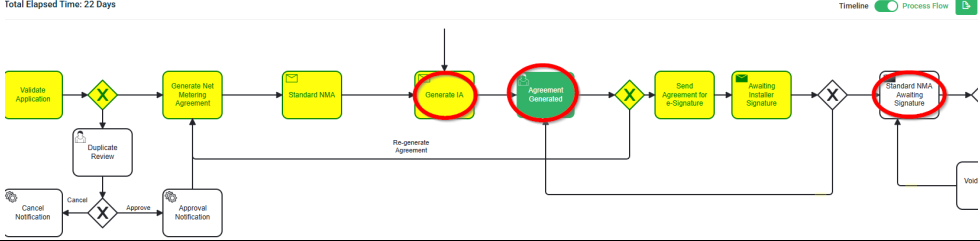Under the projects tab an Installer Master or Installer may view project applications. Projects may be searched or filtered.

The installer master/administrator may view but not edit any application in their organization.

An installer may view or edit applications they have created.

Options when viewing an application include:

Step	Action
1. Current Status	The status updates to green as you step through the application.
2. History	Click "History" to see the Transaction History View which shows the status and time within each step. You can toggle between timeline and process flow. Process flow shows the completed steps in yellow, current step in green and outstanding steps in white.
3. Comments	Shows all workflow steps and comments for the project application.

4. eSignature	Shows history of eSignatures for the project application.