



Colorado Springs Utilities
It's how we're all connected

Admin Training

May 12, 2025

Agenda

1. Company registration
2. Logging in
3. Adding users
4. Managing users
5. Demo
6. Resources
7. Questions

Company Registration

Enter all data to create a new installation company.

After saving:

A window will pop up with “successfully registered.”

An email will send to the address you entered to set up your password.

The screenshot shows the 'Installation Company' registration form. At the top, there are logos for 'CONNECTING SOLAR' and 'Colorado Springs Utilities' with the tagline 'We have you covered'. To the right is the text 'APPLICATION PORTAL' and a 'Contact Us' link with a speech bubble icon. The form title is 'Installation Company' with a 'Close' button and a 'Save' button (circled in red). The form is divided into a 'Company Information' section. The fields are: Username, Company Name, First Name, Last Name, Email Address, Phone Number, Address, City, State (a dropdown menu with 'CO' selected), and Zip Code. A red oval highlights the entire form area. At the bottom, a disclaimer states: '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.'

Logging in

- Check your inbox for the ANB email
 - Utilize link within 30 minutes to set password
 - If the link has expired visit the portal login page and select “forgot password” to send a new link
- Set a new password
- Visit the login page and enter your “username” and “password”
- You’re in!

The screenshot displays the 'Installer Master' dashboard. At the top, a blue banner indicates the user is logged in as 'Installer Master'. The dashboard features three main summary cards: '2 TOTAL PROJECTS' (dark blue), '1 AWAITING INSTALLER SIGNATURE' (orange), and '0 STANDARD NMA AWAITING SIGNATURE' (green). Below these are two queue tables: 'INSTALLER QUEUE' and 'COLORADO SPRINGS QUEUE'. The 'INSTALLER QUEUE' table has three rows: 'Agreement Generated' (0), 'Project Rejected' (0), and 'Awaiting Permit Number' (0). The 'COLORADO SPRINGS QUEUE' table has three rows: 'Pending Application Review' (0), 'Project Resubmitted' (0), and 'Pending PTO' (0). Navigation links for 'Dashboard', 'Projects', and 'Training Guides' are visible in the top right.

CONNECTING SOLAR
Colorado Springs Utilities

You are logged in as **Installer Master**

[Dashboard](#) [Projects](#) [Training Guides](#)

Dashboard

2
TOTAL PROJECTS

1
AWAITING INSTALLER SIGNATURE

0
STANDARD NMA AWAITING SIGNATURE

INSTALLER QUEUE

Project Status	Project Count
Agreement Generated	0
Project Rejected	0
Awaiting Permit Number	0

COLORADO SPRINGS QUEUE

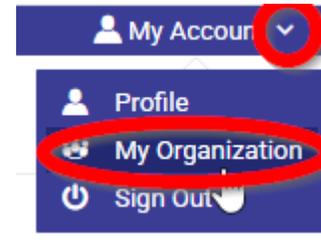
Status	Project Count
Pending Application Review	0
Project Resubmitted	0
Pending PTO	0

Demo



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Adding Users



Edit Organization

Cancel

Save

General Address **Users** Participations

User ID [v] Type here to search [Q] [Q]

User ID	First Name	Last Name	Role	Email ID	Organization	Last Login	Last Reset Req...	Is Active	Created At	Created By	Updated At
---------	------------	-----------	------	----------	--------------	------------	-------------------	-----------	------------	------------	------------

+ User

Open "My Account"

Then "My Organization"

You can add users by clicking the button on the right "+User."

Enter a new user for each person who will be entering applications.

Complete all asterisked data and click save

General Address **Users** Participations

Add User [Cancel] [Save]

User Details

* User ID [input]
* Last Name [input]
* Organization [ERcompany1024 v]

* First Name [input]
* Roles [Select Role v]
Reporting To [Select Reporting To v]

Middle Name [input]
* Default Role [Select Role v]

Contact

* Email ID [input]
Country [Select Country v]
Zip Code [input]

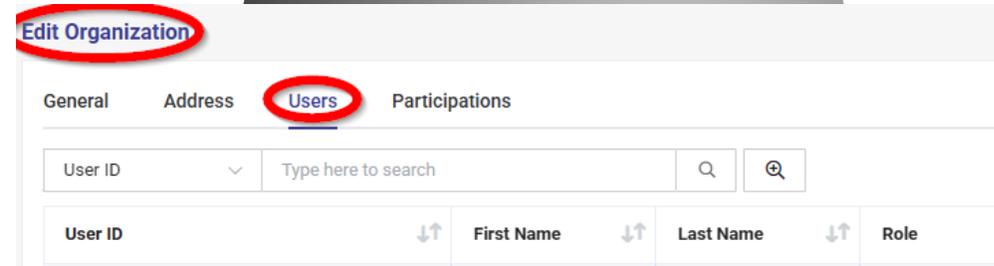
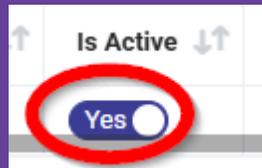
Work Phone [(###) ###-####]
State [Select State v]
Street Address [input]

Mobile [(###) ###-####]
City [input]

Managing Users

Edit organization

- users
 - Lists all the company users
- Edit the user
 - Select the bold "UserID" to edit
 - User details window will open.
 - Click "save"
- Deactivate users
 - Toggle the "is Active" column slider
 - Yes to No



Resources

Portal:

Login page: Documents and Guides
Dashboard: Training guides

Connecting Solar webpage:

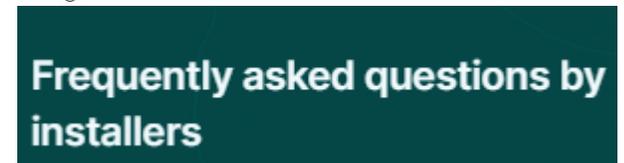
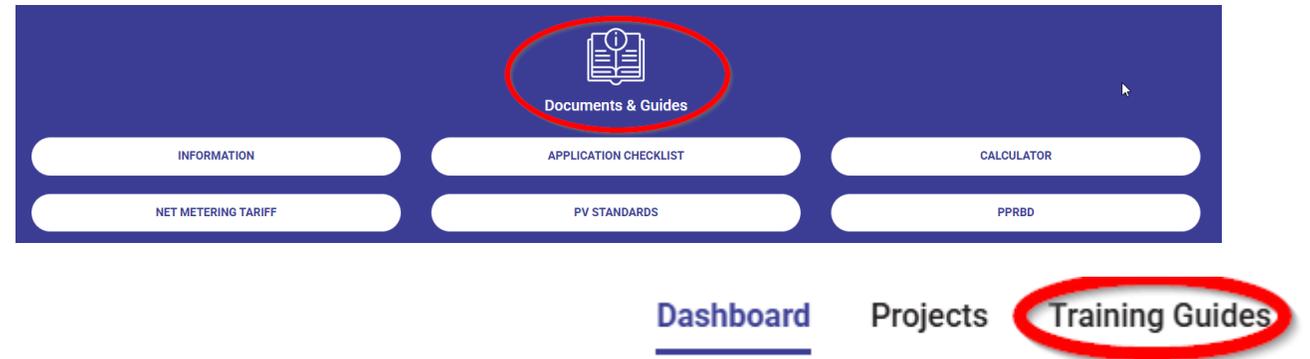
<https://www.csu.org/solar-energy-program>

Open the installer information

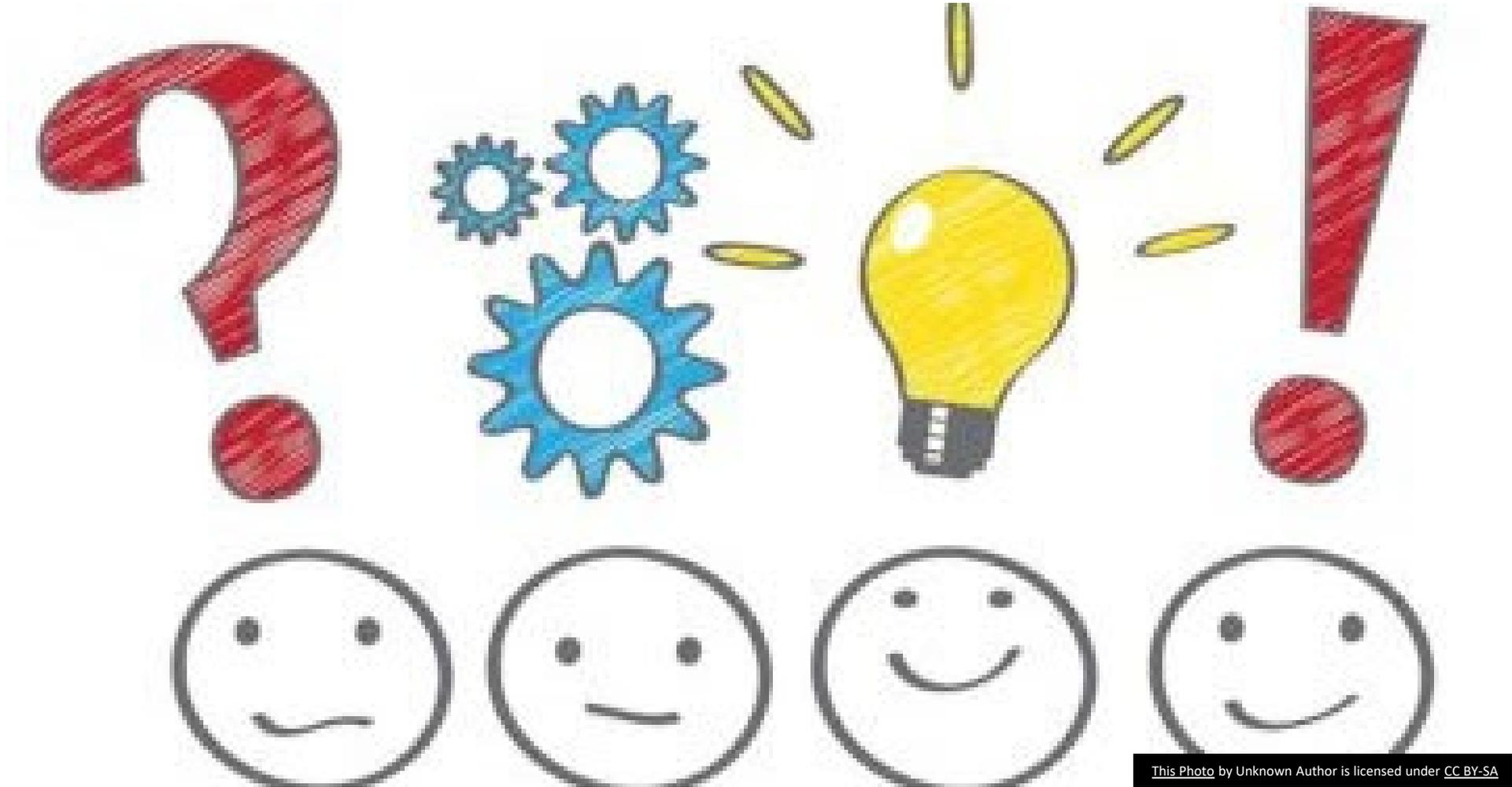
Scroll to the bottom:

Related resources & documents

FAQs



Questions



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