How to Create and Manage Your eTRACK+ 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:

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- Account Registration
- Logging in
- Account & User Management
- Viewing Projects/Applications

Account Registration

Step	Action
1. Locate	From the Installer Page or Dashboard, select the "Register as Installer"
eTRACK+	button or click "register here."
registration	"Restricted Access - Only for Authorized Users"
on the	*User ID Forgot User ID?
Connecting	Enter your User ID
Solar	- reserved - Hargot Password Enter your password
website.	Click here to register as "Installer"
	REGISTER AS INSTALLER > Not registered? Register Here Looking for the Customer Login? Elick Here
2. Complete	Each eTRACK+ user must have a unqiue email address.
the	Contact Us
required	Installation Company Close
fields.	Corpusy Information - 'Unmarke 'Company Name 'Company Name 'First Name 'Lest
	*Mou Nuther JohdbaigComputy.com (71)9555122
	* Address * City * Bitke * 20 Code 123 Main Street Colored Springs Colored Sp
	By submitting this form you are neptatering 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.
	Selecting the Contact Us icon will open a web form to submit questions to
	support staff.
3. Click the	You will receive a popup confirming your registration. You may now close
Save	the tab or window.
button.	\bigotimes
	Thank you for registering. An email will be sent to set your password.
	For further details, please contact connectingsolar@csu.org
	Close this Window

4. Set your	You will receive an email from eTRACK+	containing a link to setup a
password.	password. If you do not receive the link,	check your spam, or junk folders.
	CANADA SUPERATING	
	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 f	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 cli	icking 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 repty directly to this automatically genera	ted email. If you have a question, please contact <u>connectingsolar/acsu.org</u>
	Click the link and enter your account pas	ssword and click Submit.
	Reset Password	
	* New Password	Password Rules
		Minimum password length should be 10
	* Confirm Password	Use at least 1 uppercase (A-Z) character
		 Use at least 1 lowercase (a-z) character
		Use at least 1 special character
	Cancel Submit	Use at least 1 number (0-9)
		Password should not include User ID
	You will receive a confirmation email inc successful.	licating your registration was

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Logging in

Step	Action
 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.
	<image/>
2. Customer	If a customer is looking for documents completed by the
documentation	installer, please have them navigate to the Customer Login
view.	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.
 - \circ $\;$ View all applications for users in their company.

	Step	Action
1.	Selecting	For users with both Installer Master and Installer access, you will need
	Your Role	to 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.
		APPLICATION PORTAL Welcome John Doa You are logged in as linstaller Master 🗸
		Dashboard Projects Training Gu
		Dashboard
2.	User	The dashboard shows a list of interconnection applications and
	Dashboard.	statuses. If you are in the Installer Master role, the quantity of each
		category is the sum of all installers in your company.

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	APPLICATION PORTAL	Welcome John Doe You are logged in as Installer Master 🔗	💄 My Account 🛩
	CONNECTING SELLS		Dashboard Projects Training Guides
	Dashboard		
	TOTAL PROJECTS	AWAITING INSTALLER SIGNATURE	STANDARD NMA AWAITING SIGNATURE
	INSTALLER QUEUE	COLORADO SPRINGS QUEUE	
	Project Status	Project Count Status	Project Count
	Agreement Generated	0 Pending Application Review	0
	Project Rejected	0 Project Resubmitted	0
	Austria Damin Musehan	Durder DTO	
	Awaiting Permit Number	U Penaing PTU	U
3. User	To view or modify your p	profile, select "Profile" ur	nder the My Account
profiles	link in the upper right co	rner of the application. I	Note, the "My
promes	Organization" link will or	he appear for Installer M	lasters
	Organization link will of	ny appear for installer iv	lasters.
		My Accoun	t ~
	Das	hboard Projects 💄 Profile	
		😽 My Organiza	tion
		ථ Sign Out	
	Modify non-greyed field	s in the Details and Conta	act Details by typing
	over and selecting save.		
	JD John Doe		
	Change Installer Massler/Massler		
	My Profile Details Contact Details Change Password		Cancel Save
	* Email ID JohnDee@tjftco.xyz	Work Phone	
	Mobile 7995551222	Address	
	Country	State	
	Select Country City	Select State	
	You may change your pa	ssword from the Change	Password tab.
	JD John Doe Installer Masterinstaller		
	Charge		
	My Profile Details Contact Details Change Password		Cancel Size
	* Current Password	Password Rules Minimum password length should be 10 	
	* New Password	Use at least 1 uppercase (A-Z) character Use at least 1 lowercase (a-z) character	
	* Confirm Password	Use at least 1 special character Use at least 1 special character Use at least 1 number (0-9)	
4 NA.			
4. IVIY	An installer Master may	change the company info	ormation including the
Organizatio	profile, company addres	s, and manage company	users.
n (Installer	Edit Organization		X Cancel Save
Master Only).	General Address Users		
	· organization rype Installer	· Name · MyGompanyName	
	* Federal Tax Id	Contact Name	
	Email ID		
		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.
		Uber ID V Type here to search Q. QL Uber ID Uper here to search QL Uper here Uper here
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: Select "+User." Enter the required information. You can provide Installer Master and/or Installer roles for a user. 3. Select "Save." 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	Click the username and update the fields desired.
	User (Installer Master Only).	User ID V Type here to search User ID I First Nan User ID John atester0404 Jack Total 2 10/page V < 1 > Go to 1
6.	Deactivating	Users are not deleted since they may have applications associated with
	a User (Installer Master Only).	their Username. Instead, the Installer Master should deactivate them by toggling the "Is Active" slider to "No."
		د الله Active در؟ وتعدی وتعدی

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Viewing Projects/Applications

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

opplication ID 🗸 🗸	Type here to search	Q	Θ,				6	App App	lication Small	System 🗸
Application ID 🙏 🕆	Project Name 💷 🕸	Workflow Status $\downarrow\uparrow$	Created At 👘	Updated By $\qquad \downarrow \uparrow$	Updated At $\downarrow\uparrow$	Created By	φ I	Status Date	μ†	Address
CS-69	LFJTEST0403	PTO Issued	04/03/2024	Luthercsutest	04/03/2024	Ifjinstaller0312		04/03	2024 10:26 AM	12345 Broad Stree
CS-68	Testing Project 1	Project Resubmitted	04/02/2024	Ifjinstaller0312	04/02/2024	Ifjinstaller0312		04/02	2024 12:00 PM	12345 Main Stree
CS-67	-	Created	04/02/2024	lfjinstaller0312	04/02/2024	lfjinstaller0312		04/02	2024 11:32 AM	-
S-65	LFJTEST 20240402	PTO Issued	04/02/2024	Luthercsutest	04/02/2024	Ifjinstaller0312		04/02	2024 10:03 AM	123 Main Street

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	The status updates to green as you step through the application.
	Status	APPLICITN VOTIN V Via ze logged na Stalaler - Dashboard Projects Training Guides
		Project % 👌 🗠 Comments 🕅 History X Cose
2.	History	Click "History" to see the Transaction History View which shows the status and
		time within each step.
		🖓 History
		Transition History View
		Gial Elapsed Time: 22 Days
		03/03/2025 Waiting 220 Workflow Status Status Changed By Total Elayered Time Agreement Generated 22 days -
		03/03/2025 03/03/2025 03/03/2025 03/03/2025 03/03/2025 05:40 AM AV
		03/03/2025 03/00000000000000000000000000000000000
		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.
		Total Elapsed Time: 22 Days Timeline 💽 Process Flow D
		Dopticate Agreement Agreement Void
		Corost Approx Approx Approx Approx Approx Approx
3.	Comments	Shows all workflow steps and comments for the project application.
		Total Elapsed Time: 5 Days
		11/14/2024 05:12 AM Waiting 5d Workflow Status Status Changed By Total Elapsed Time SLA PTO ISSUED Subhashi T 5 days –
4.	eSignature	Shows history of eSignatures for the project application.

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Parties				Document Audits	
Name	Sent	View	Signed	TimeStamp	Message
	emaila	address	~	11/14/2024 04:42 AM	All signers have signed and the docum now executed. Copies have been sent t
				email address	
				11/14/2024 04:42 AM	signed the document on Microsoft Edg Windows from 115.111.7.226.
				11/14/2024 04:38 AM	viewed the document on Microsoft Edg Windows from 115.111.7.226.
				11/14/2024 04:36 AM	was emailed a link to sign.
Interconnection App Document Id:1af47e6a-c5t Parties	blication 56-4660-9539-4adofob3ded	j1 Status:Exec	uted Sent:11/14/	2024 04:33 AM Expiry:11/15/202 Document Audits	1 04:33 AM Completed:11/14/2024 04:36 AM
Interconnection App Document Id:1af47e6a-c53 Parties Name	Dication 55-4660-9539-4adofob3ded Sent	d1 Status:Exec	uted Sent:11/14/3 Signed	2024 04:33 AM Expiry:11/15/202 Document Audits TimeStamp	4 04:33 AM Completed:11/14/2024 04:36 AM Message
Interconnection App Document Id:1af47e6a-c55 Parties Name	Dication 55-4660-9539-4adofob3ded Sent V	11 Status:Exec	uted Sent:11/14/3 Signed	2024 04:33 AM Expiry:11/15/202. Document Audits TimeStamp 11/14/2024 04:36 AM	4 04:33 AM Completed:11/14/2024 04:36 AM Message All signers have signed and the docum now executed. Copies have been sent t
