

How to Create and Manage Your eTRACK+ Account

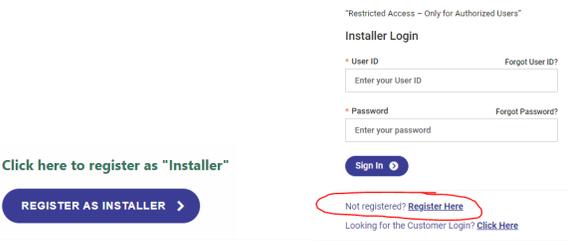
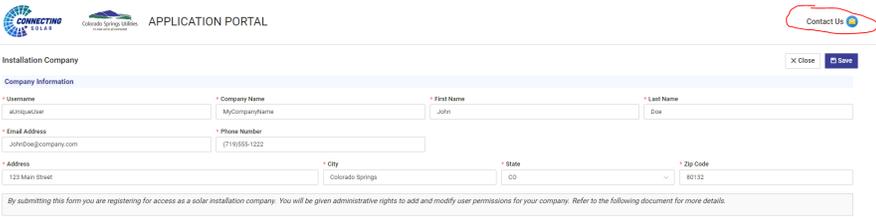
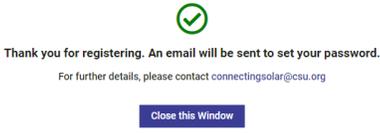
Quick Reference Guide

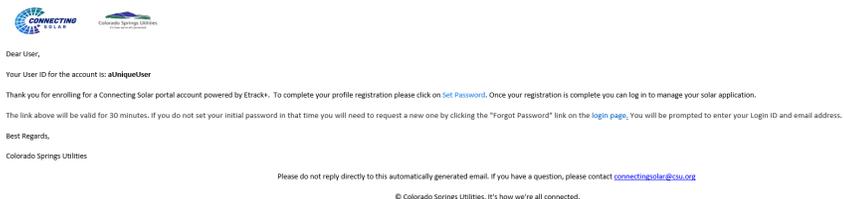
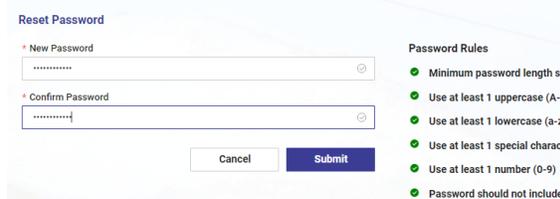
Description: This guide provides instructions on how to register for an account in eTRACK+, sign in, and update permissions for individuals within your company. Setting up an installer master/administrator to review and manage company contacts is the first and crucial step. If your company is registered 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:

- [Account Registration](#)
- [Logging in](#)
- [Account & User Management](#)
- [Viewing Projects/Applications](#)

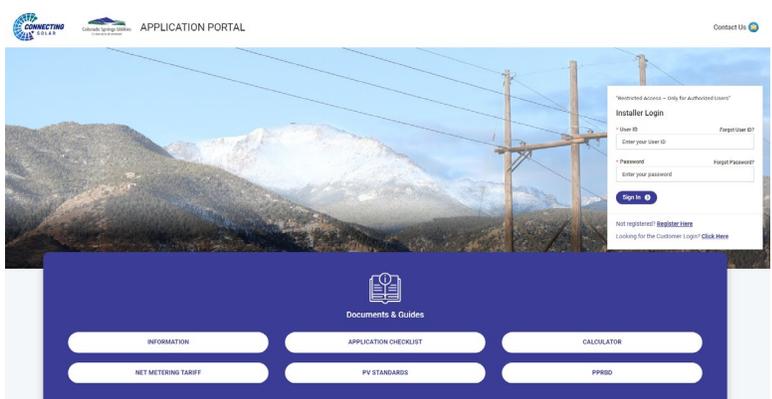
Account Registration

Step	Action
<p>1. Locate eTRACK+ registration on the Connecting Solar website.</p>	<p>From the Installer Page or Dashboard, select the “Register as Installer” button or click “register here.”</p> 
<p>2. Complete the required fields.</p>	<p>Each eTRACK+ user must have a unique email address.</p>  <p>Selecting the Contact Us icon will open a web form to submit questions to support staff.</p>
<p>3. Click the Save button.</p>	<p>You will receive a popup confirming your registration. You may now close the tab or window.</p> 

<p>4. Set your password.</p>	<p>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.</p>  <p>Click the link and enter your account password and click Submit.</p>  <p>You will receive a confirmation email indicating your registration was successful.</p>
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Logging in

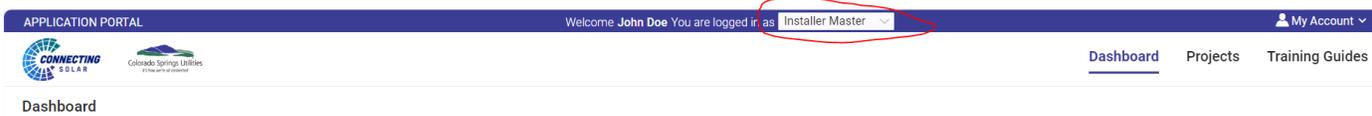
Step	Action
<p>1. Logging In to your account.</p>	<p>The login page contains important guides and information related to the interconnection process and the login widget.</p> <ul style="list-style-type: none"> • Enter the Username that was registered or provided by your administrator. • Enter the Password you chose. • If you forget your Username or Password, select the respective link to the right and follow the directions to reset. 
<p>2. Customer documentation view.</p>	<ul style="list-style-type: none"> • 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.	<ul style="list-style-type: none"> Follow the customer registration steps to create an application to install a solar energy system.

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Account & User Management

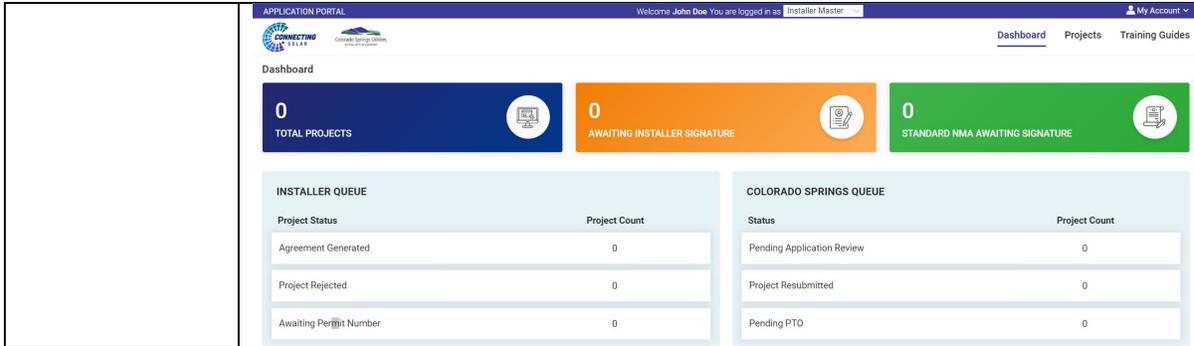
There are two types of installer accounts available in eTRACK+. The first employee registering for the installation company is the Installer Master. The Installer Master is the company administrator and will create and manage installer roles by entering and updating all the installation company’s employees.



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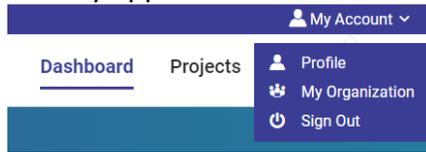
- **Installer Master** can:
 - Manage the company profile.
 - Manage the profile of company users.
 - Add and deactivate company users.
 - View all applications for users in their company.
- **Installer** can:
 - Manage their own profile.
 - Create and submit applications.
 - View all applications for users in their company.

Step	Action
1. Selecting Your Role	<p>For users with both Installer Master and Installer access, you will need 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.</p>
2. User Dashboard.	<p>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.</p>

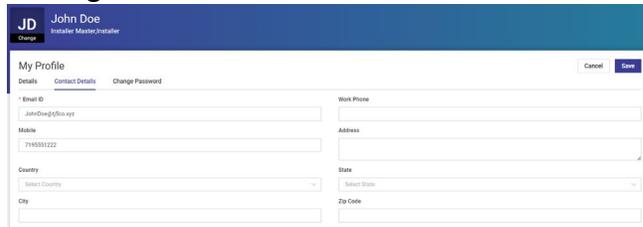


3. User profiles

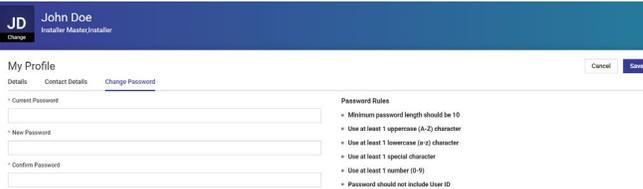
To view or modify your profile, select “Profile” under the My Account link in the upper right corner of the application. Note, the “My Organization” link will only appear for Installer Masters.



Modify non-greyed fields in the Details and Contact Details by typing over and selecting save.

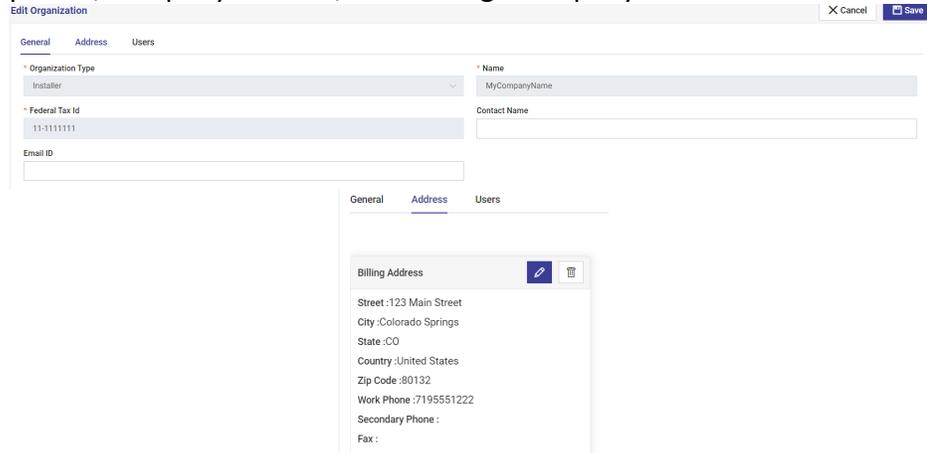


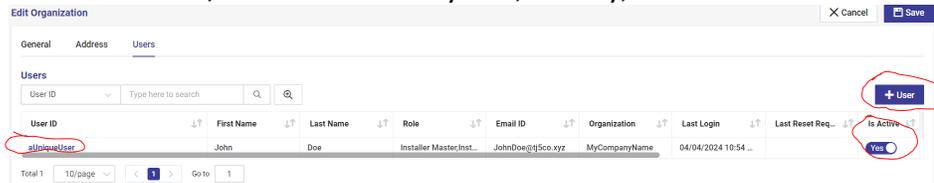
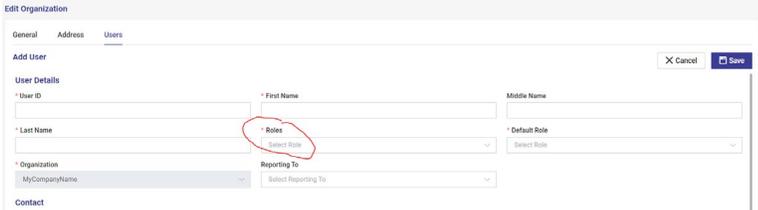
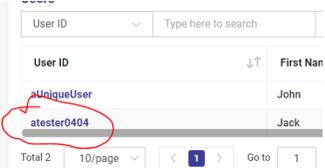
You may change your password from the Change Password tab.



4. My Organization (Installer Master Only).

An Installer Master may change the company information including the profile, company address, and manage company users.

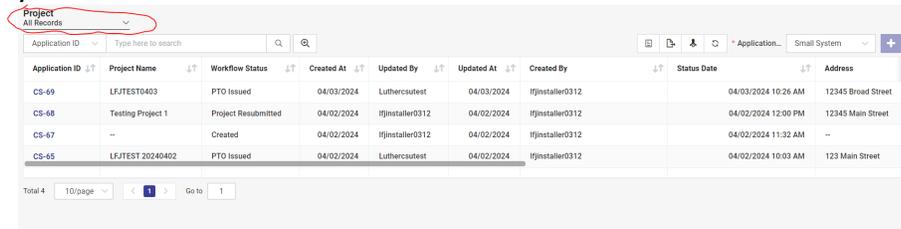


<p>5. Managing Users <i>(Installer Master Only)</i>.</p>	<p>Installer master/administrator may add, modify, or deactivate users.</p> 
<p>6. Adding a User <i>(Installer Master Only)</i>.</p>	<p>Company administrators are responsible for managing the users in their organization. Only one administrator 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:</p> <ol style="list-style-type: none"> 1. Select “+User.” 2. Enter the required information. <ol style="list-style-type: none"> a. You can provide Installer Master and/or Installer roles for a user.  <ol style="list-style-type: none"> 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.
<p>5. Modifying a User <i>(Installer Master Only)</i>.</p>	<p>Click the username and update the fields desired.</p> 
<p>6. Deactivating a User <i>(Installer Master Only)</i>.</p>	<p>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.”</p> 

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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.



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
<p>1. Current Status</p>	<p>The status updates to green as you step through the application.</p>
<p>2. History</p>	<p>Click “History” to see the Transaction History View which shows the status and time within each step.</p> <p>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.</p>
<p>3. Comments</p>	<p>Shows all workflow steps and comments for the project application.</p>
<p>4. eSignature</p>	<p>Shows history of eSignatures for the project application.</p>

Net Meter Agreement Standard
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Parties

Name	Sent	View...	Signed
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Document Audits

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11/14/2024 04:42 AM	[Redacted] signed the document on Microsoft Edge via Windows from 115.111.7.226.
11/14/2024 04:38 AM	[Redacted] viewed the document on Microsoft Edge via Windows from 115.111.7.226.
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