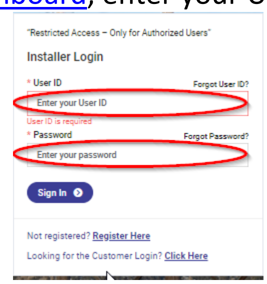
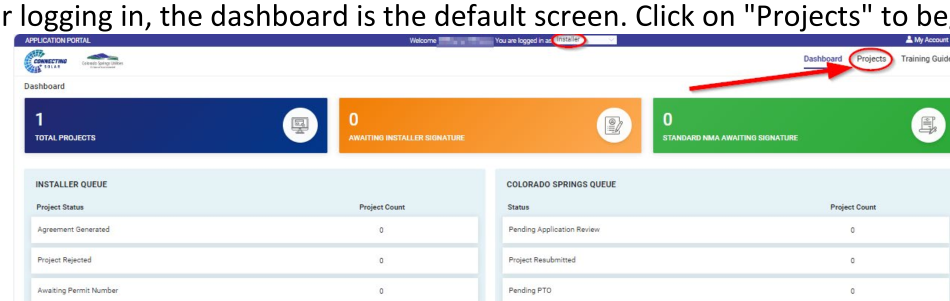
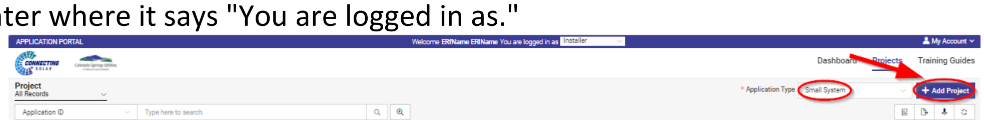
How to Create and Manage a New Application

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

Step	Action
1. Sign in to Your Account	From the Installer Page or Dashboard, enter your User ID and Password  If you receive an error, check for spacing before or after your User ID and Password.
2. Start a New Project	After logging in, the dashboard is the default screen. Click on "Projects" to begin.  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." 
3. Completing the Required Information	Fill in each tab and all fields marked with an asterisk (*). Progress from "Customer" through "Document."

Quick Reference Guide

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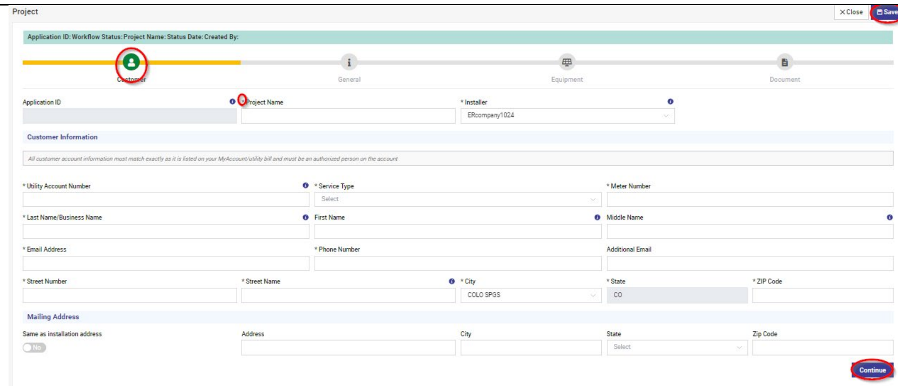

Click "Save" to return later or "Continue" to move to the next tab.

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

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<td>4. Adding Equipment to the Application.</td>
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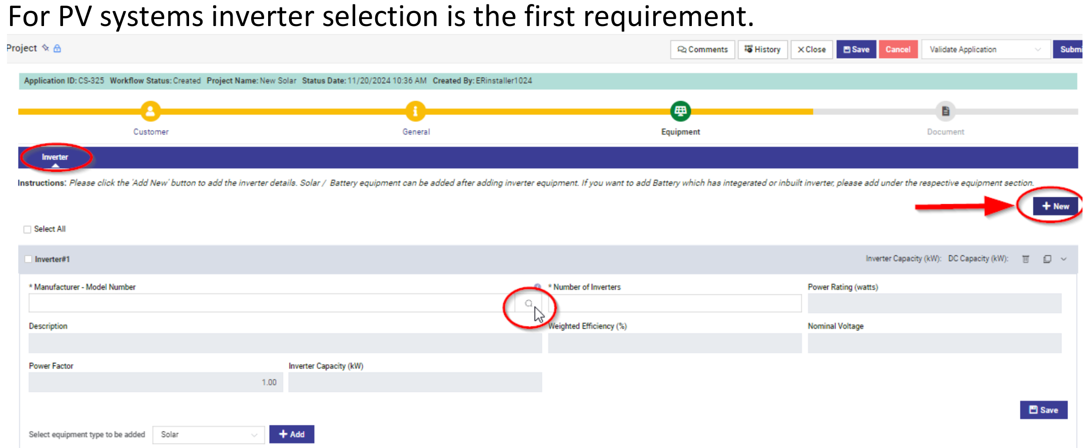
For PV systems inverter selection is the first requirement.



Click "Add" under Inverter to open the dialog box. Use the magnifying glass to search.
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	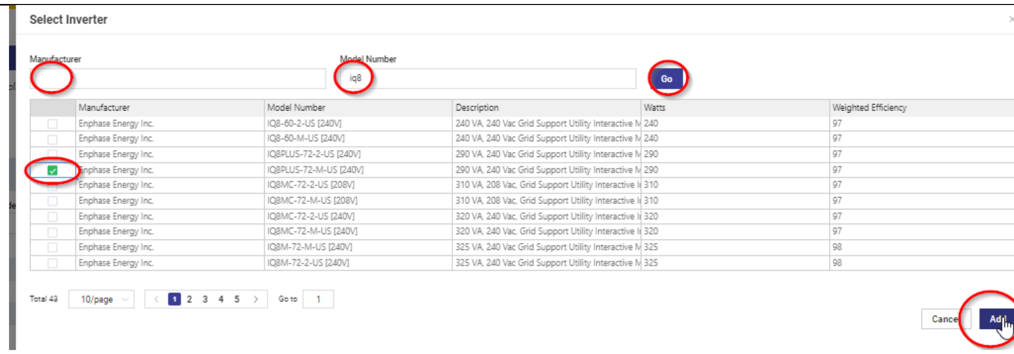 Enter the manufacturer or model, then click "Go." Select the appropriate item from the list and check the box to add it. Click "Save" after entering all solar and energy storage equipment to proceed.
5. Adding Documents /Attachments	Follow the prompts to upload necessary documents and attachments.

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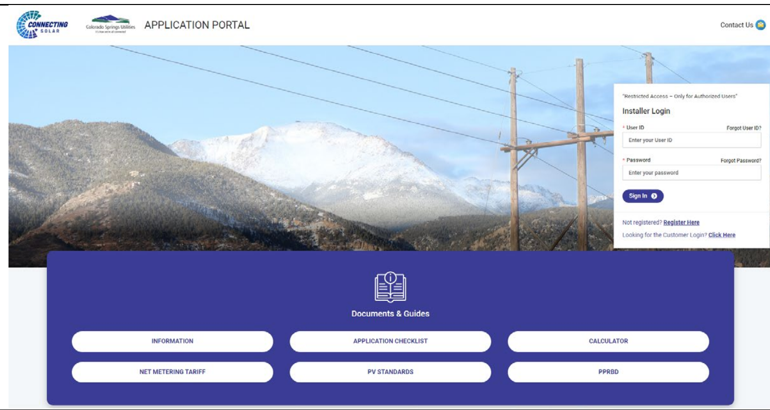
Editing and Reviewing Applications

Step	Action
1. Logging In to Your Account.	1. **Log in to Your Account** • The login page contains important guides and information related to the interconnection process. • Enter your registered User ID and chosen Password. • If you forget your User ID or Password, use the respective links to reset them. 2. **Customer Self-Installer Registration** • Follow the administrative registration steps to create your own installer login. • 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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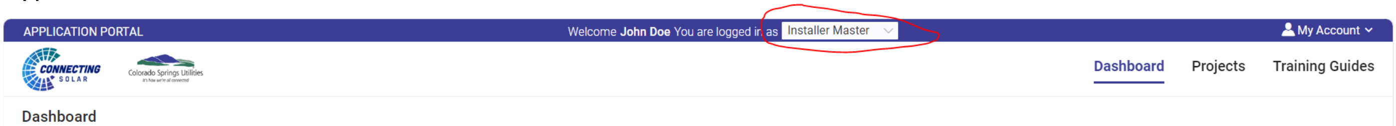
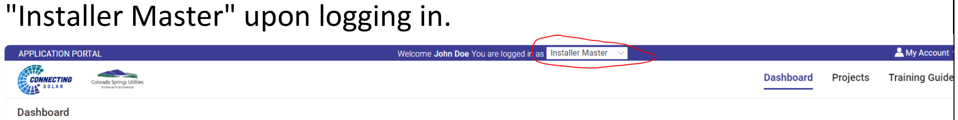
Account & User Management

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	Users with both Installer Master and Installer access will default to "Installer Master" upon logging in.  To change roles, select the appropriate value from the dropdown menu.
2. User Dashboard.	• Displays a summary of interconnection applications and statuses.

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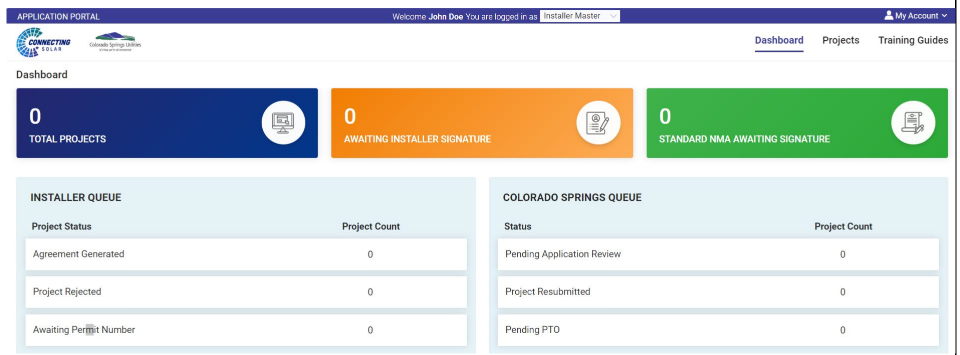
- Installer Masters see the quantity of each category for all installers in the company



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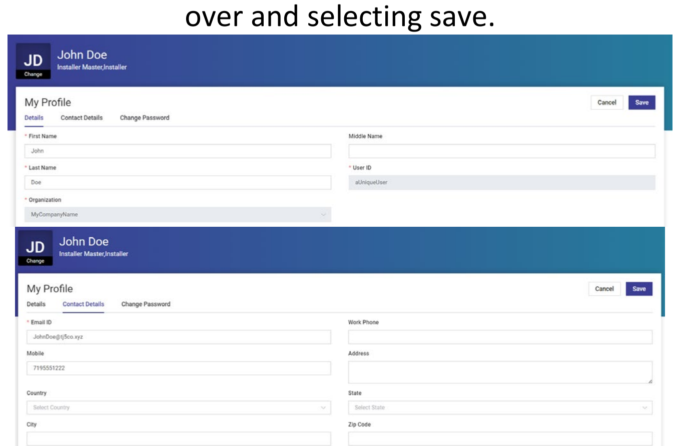
<tr><td>3. User profiles</td><td>

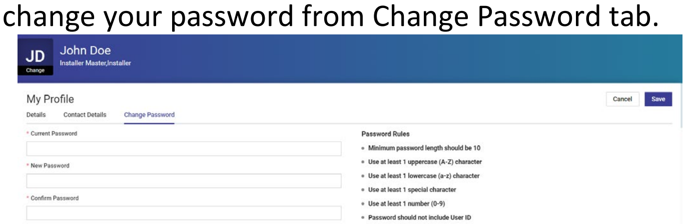
To view or modify your profile, select "Profile" under the "My Account" link in the upper right corner.

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 Change Password tab.



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<tr><td>4. My Organization (Installer Master Only).</td><td>

Installer Masters can also access the "My Organization" link to manage company information and users.

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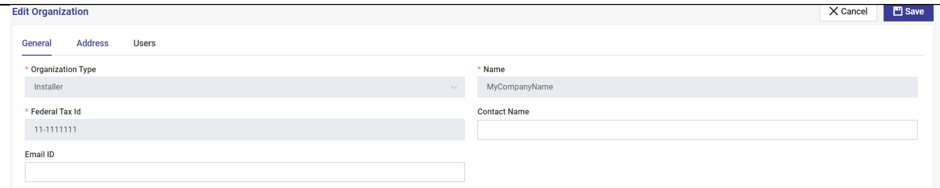

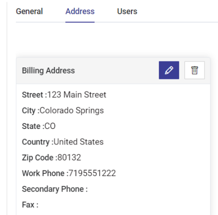

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<td>5. Managing Users (Installer Master Only).</td>
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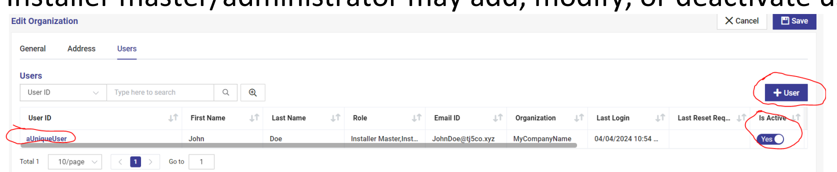
Installer master/administrator may add, modify, or deactivate users.


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<td>6. Adding a User (Installer Master Only).</td>
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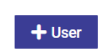
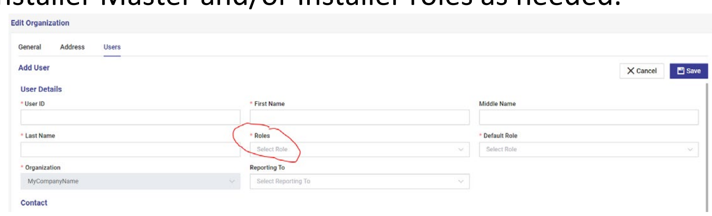
Company administrators are responsible for managing the profiles in their organization. Only one administrator should register for the account via the instructions in the Account Registration section above. Add all other users (Installers) for the company via the portal.



1. Select "+User" and enter the required information.
2. Assign Installer Master and/or Installer roles as needed.


3. Click "Save." The new user can then set their initial password via the "forgot password" link.
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<td>4. Modifying a User (Installer Master Only).</td>
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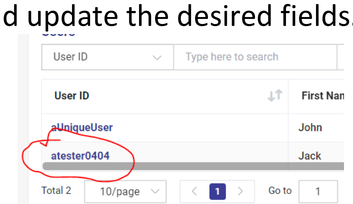
Click the username and update the desired fields.


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<td>5. Deactivating a User (Installer Master Only).</td>
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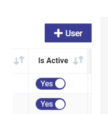
Instead of deleting users, deactivate them by toggling the "Is Active" slider to "No."


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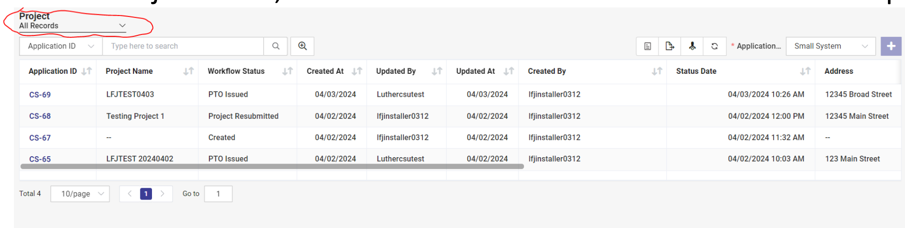
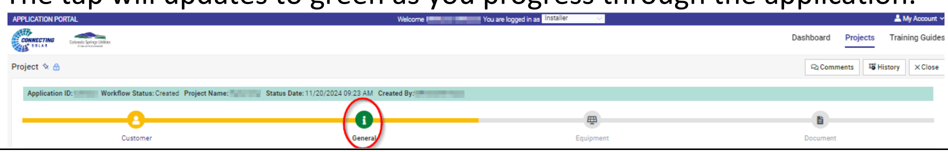
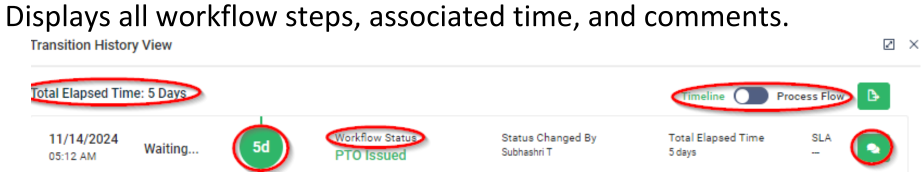
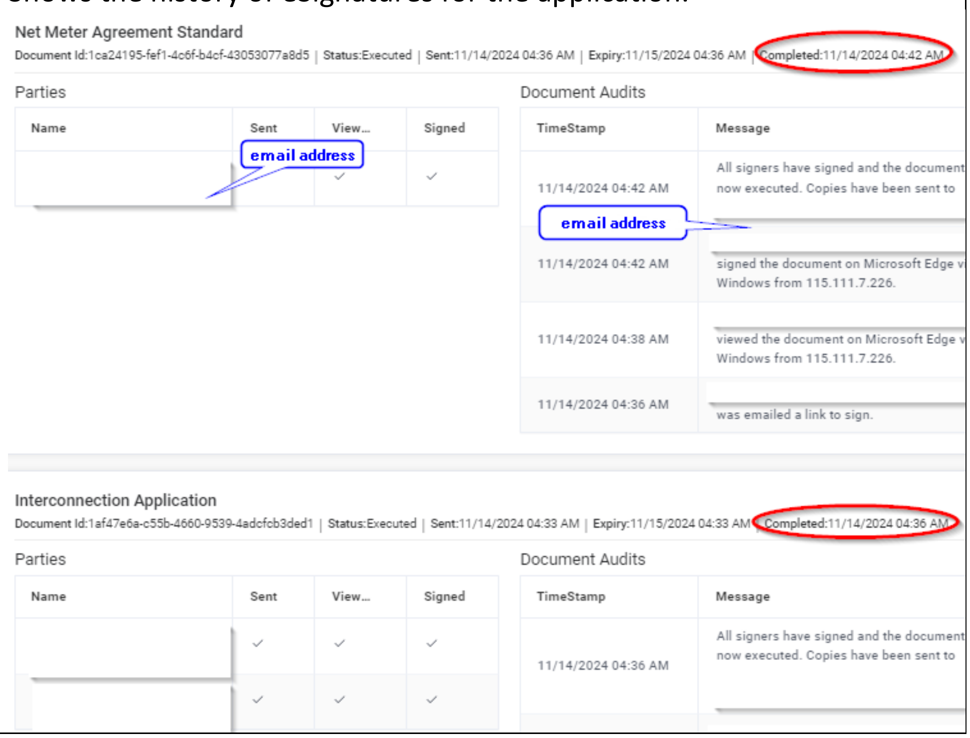
Viewing Projects/Applications:

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



- 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	The tap will updates to green as you progress through the application. 
2. Comments	Displays all workflow steps, associated time, and comments. 
3. eSignature	Shows the history of eSignatures for the application. 

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