# Energex
# Electrical Partners Portal

My Profile
Registration Details, EWR Notifications,
My Groups User Guide

**Energex Limited**
18 February 2020

L.V. COVER
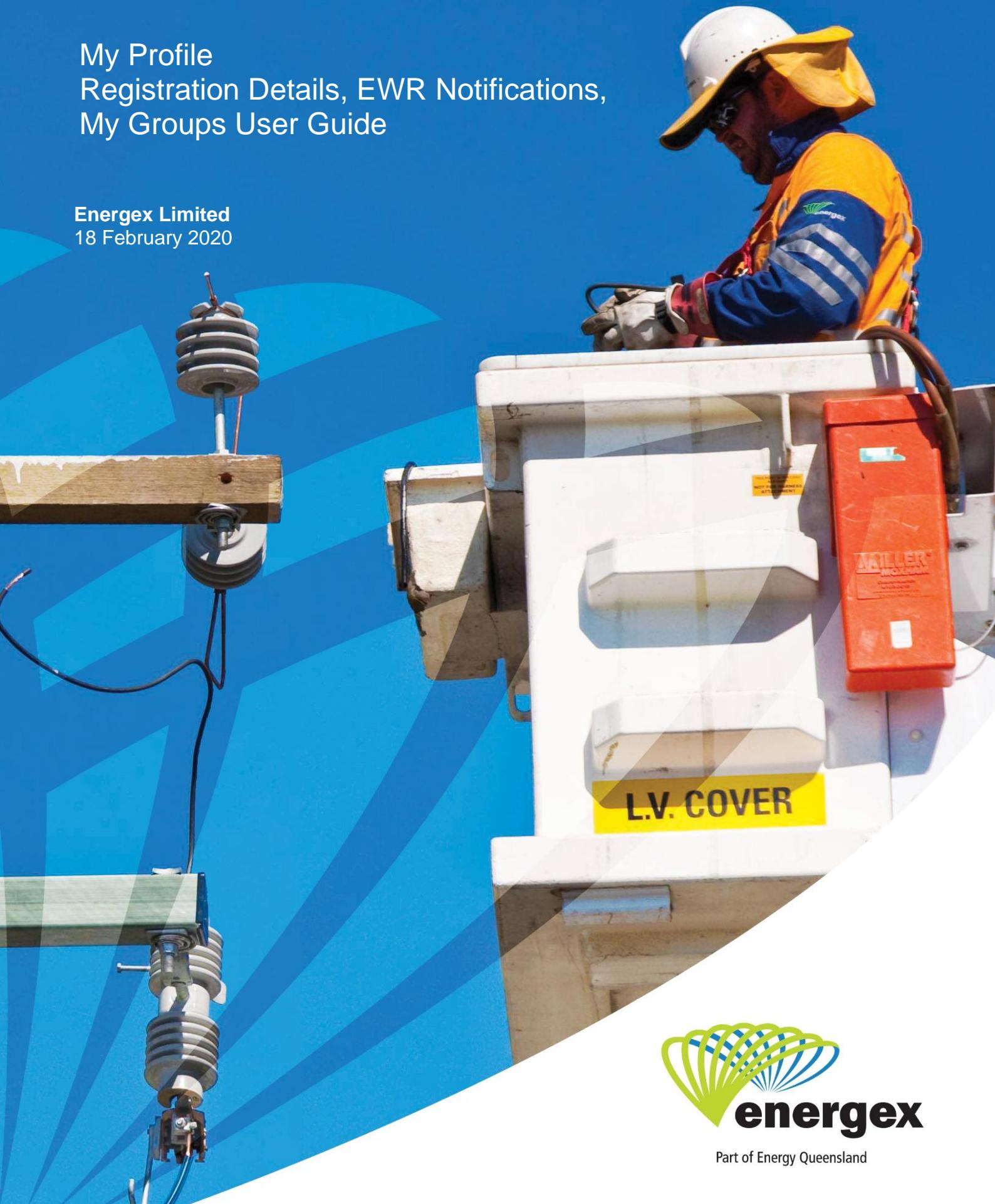
## Version Control

| Version | Date | Description |
|---------|------|-------------|
| 1.0 | 18/02/2021 | Initial |
| 1.1 | 02/01/2026 | Updated to general enquiries opening times |

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# Contents

# MyProfile



In the MyProfile area of the External Partners (EP) Portal you can:

- Update your **Registration Details** (e.g. username, password, email address)
- As a Solar Installer, you can **add multiple or new** CEC Accreditation numbers in manually
- As an Electrical Contractor, you can **select what EWR status updates** you would like to be notified for all EWRs
- **Access to My Groups**. This is the area where you can subscribe to another group and manage your group members as a Group Manager.

## Registration Details

Registration Details holds the information you entered when you registered for access to
EP Portal such as username, password and your unique email address. Changing
these details can only be done via this area in the EP Portal.

1. Click on Update Details or Change Password under Registration Details to change any of the listed information.
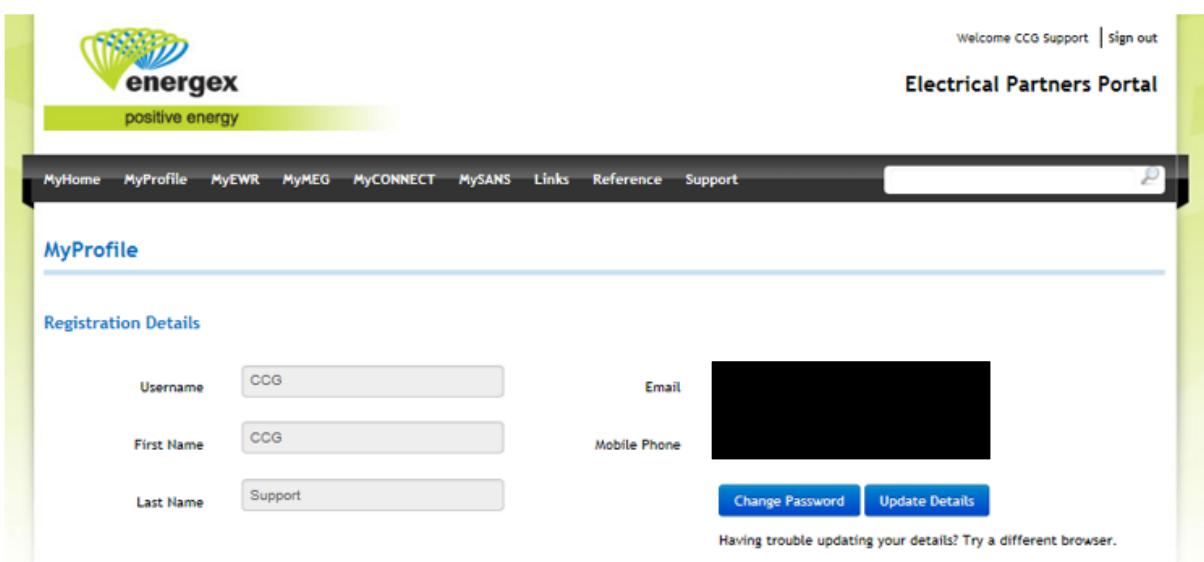
2. You will notice that a new tab or window has opened displaying all your Registration Details. To change any of these details you will need to click on UPDATE next to the relevant heading.
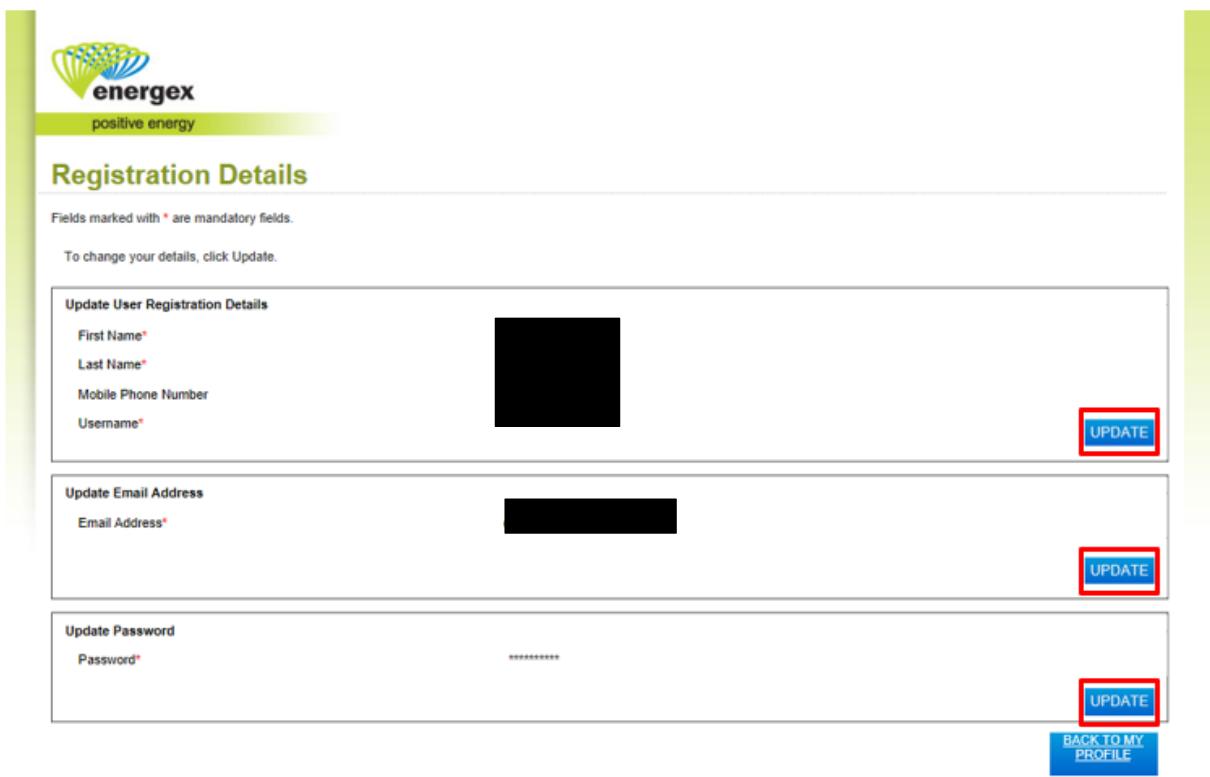


3. Once you have updated your details click on CONFIRM.
4. A message will display confirming your details have been updated. Clink on COMPLETE to return to Registration Details.
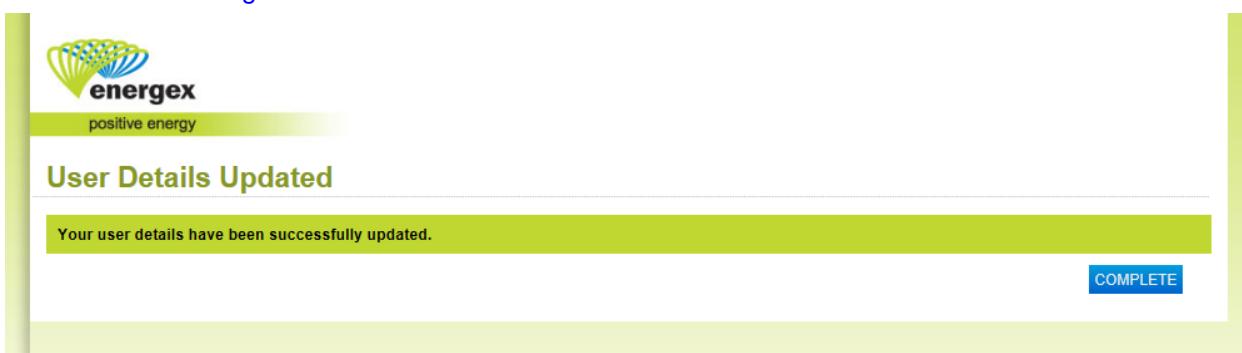


5. When updating an email address, an email will be sent to your updated email address where you will need to activate the link to confirm the change of your email. Your request to change email address will only be complete once this link is activated.

6. An email will also be sent to your original email address confirming this change request.

> You will need to click on the link provided to change your email address

Subject:  Activate your changed email address

Hello Sterling,

We have received a request to change your email address for the Energex Portal.

To activate your changed email address, please click on the link below:

https://www.sparq.com.au/my-access-preprod/Profile/ConfirmEmailAddressChange.aspx?userName=test01&confirmationCode=a1e8c99dc5d644d886353cbb9dab3d57
&emailType=New&returnUrl=https%3a%2f%2fwww.energex.com.au%2fpp-preprod%2fCP%2fProfile&CPY=EX

This email change request was made on 15/03/2013 4:05:44 PM.

For security reasons, the above link will expire in 24 hours if it is not accessed and no changes will be made to your details.

Regards,
Energex Portal Team
energexportal@energex.com.au

*******************************************************************************************

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 Energex
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 http://www.energex.com.au

Energex policy is to not send unsolicited electronic messages. Suspected breaches of this policy can be reported by replying to this message including the original message and the word "UNSUBSCRIBE" in the subject.

*******************************************************************************************

To report this email as spam, please forward to spam@mailcontrol.com

**NEED TO KNOW**

For security reasons, you have 24 hours from the time the request was made to change your password using the link in the email.  If you do not click on the link inside this 24 hour timeframe, your request will expire, and you will need to try your request again.

# Changes to Update on your Next Login

Any changes made to your Registration Details can be seen on the Update Details page, however these  changes will not be visible under the heading Registration Details under MyProfile until you logout, then log  back in.

# Clean Energy Council (CEC) Details

**Clean Energy Council Details**

If you have multiple CEC Accreditations or need to replace an expired Accreditation, enter the CEC number, check it then click 'Add CEC Number'.
Please enter your Clean Energy Council (CEC) Accreditation Number:

| | Check |

| | Add CEC Number |

| Accreditation Number | Licencee | Status |
|---|---|---|
| A12345678 | Joe Citizen | Current |

If you have **multiple** CEC Accreditation Numbers or your existing CEC Accreditation Number has **expired**, manually add in your new or additional CEC Number here.

If your existing CEC Accreditation Number has **expired,** the Status will automatically update in the green table from Current to Expired.

To add another CEC Number:

1. Enter in the CEC Accredited number in the field provided and click on Check.

2. If the name is correct, click on Add CEC Number to add this CEC number into the EP Portal. When submitting a CONNECT, this number will now appear under the Clean Energy Council Accreditation No. field.

> **NEED TO KNOW**
> If your CEC Accreditation Number has expired the status will change from Current to Expired. When submitting a new CONNECT, the expired CEC Number will no longer appear in the drop down list under the Clean Energy Council Accreditation No. field.
> You cannot delete an expired CEC Accreditation Number.

# Manage My Notifications



**Manage My Notifications** (callout on image)

- Use my Registration Email Address
- Change my Notification Email Address to: [black box]
- Use my Registration Mobile Number
- Change my Notification Mobile Number to: 0400000001

*The email address and phone number will automatically default to your Registration email address and phone number.*

| Status | Notify Me By |
| --- | --- |
| EWR Processing | ☐ Email ☐ SMS |
| Awaiting Retailer Request | ☐ Email ☐ SMS |
| Retailer Request Received | ☐ Email ☐ SMS |
| Appointment Set | ☐ Email ☐ SMS |
| Work Scheduled | ☐ Email ☐ SMS |
| Retailer Request Cancelled | ☐ Email ☐ SMS |
| Cancelled due to Scheduling | ☐ Email ☐ SMS |
| Cancelled by Retailer | ☐ Email ☐ SMS |
| Closed - No Access | ☐ Email ☐ SMS |
| Incomplete - Form 3 Left | ☑ Email ☑ SMS |
| Completed | ☐ Email ☐ SMS |
| Completed - Form 3 Left | ☑ Email ☑ SMS |

*Hover your mouse over a Status type to see the definition or click on help*

*You will automatically be notified on Form 3 Left updates*

Save Settings

Manage My Notifications allows you to select which of the EWR statuses you would like to receive an update on, and how you wish to receive these updates.

- You can receive updates via Email, SMS or both.
- Your selection here will be the default for all submitted EWRs.
- You will automatically receive updates on Incomplete - Form 3 Left and Completed – Form 3 Left.

**NEED TO KNOW**

When submitting a new EWR, you can change these notification settings for that EWR only, through the *Change EWR Notification* area.

# Change your Email Address or Mobile Number

1.  The email address and mobile number will **automatically default to your Registration** email address and Mobile number.  If you would like to send your EWR status updates to a different email  address and/or mobile number, click on:

    -   Change my Notification Email Address to:

    -   Change my Notification Mobile Number to:

2.  You will need to enter in your new email address and/or mobile number **in the blank field**.

3.  Click on Save Settings located underneath the **green** status table to save changes.

> **NEED TO KNOW**
> If you make any changes to your email address or mobile number, you will receive an email to confirm  that these changes have been made.  Look for an email from
> energexportal@energex.com.au

# Select or Change your EWR Status Updates

1.  If you are not sure what each EWR status means, you can hover over the status (e.g. EWR Processing, Completed) or click on the help 🔵 for more information.

2.  Next to the EWR Status, tick how you wish to be notified under the Notify Me By heading. You can  select Email, SMS or both.

3.  Click on Save Settings located underneath the **green** status table to save changes.

# My Groups



The My Groups area will display all Groups (or businesses) you have subscribed to, your role and the status for that Group.

My Groups will look slightly different for all users depending on how you have been set up - whether you are  Group Manager or a Member.

- Group Name -  This is the business you have subscribed to

- Group Reference

   o  If you are an Electrical Contractor - your EC Licence number will be displayed

   o  If you are a Solar Installer - you will see your EGX reference number which associates all users to the same Group

- My Role – Are you a Manager or a Member for your Group

- My Status – What is your subscription status?

   o  Approved – your subscription been Approved by the Group Manager

   o  Pending Approval – the Group Manager has yet to Approve or Decline your subscription

- Manage button – This button will only appear if you are set up as a Group Manager. The Manage button allows you change a user's role (Group Manager or Member), approve or decline subscription requests and view all members associated with your Group.

- Unsubscribe button – This button will only appear when your subscription request has been approved. If your subscription request is not approved, the button will display as Cancel Request.

- Subscribe to another Group – If you work for more than one business, you can subscribe to another Group.

# How to Approve or Decline a Member Subscription

The Group Manager will receive an email each time a new member subscribes to their



Group. it is the Group Managers responsibility to Approve or Decline their subscription.

1. Click on the Manage button to take you to your Group Members list. If you are a Manager for more  than one group, ensure you select the Manage button next to the correct Group Name. (Refer to  above example).



2. Look for the member who is requesting access to your Group and click on the action to either Approve or Decline their request.

   - Approve – will allow access to your Group
   - Decline – will not allow access to your Group
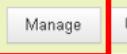
> **NEED TO KNOW**
> An email is sent to the Member to advise the outcome of their subscription request, whether they have  been approved or declined.  An email is also sent to the Group Manager.
> Once a member is approved, they can access the EP Portal straight away.

# Change Role from Member to Manager or Manager to Member



There are two types of roles within the EP Portal; Group Manager and Member.
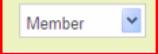
- Group Manager – can view all EWRs and/or CONNECTs (Solar PV – Form 1060) submitted for the business, as well as the responsibility to approve, decline or unsubscribe (remove) members from the Group. Users who are set up as the Group Manager will receive emails sent from the EP Portal when a user's details change.

- Member – can only view EWRs and/or CONNECTs (Solar PV – Form 1060) they have submitted for the business.

**NEED TO KNOW**
Only a user set up as Group Manager can change roles from Member to Manager or Manager to Member.

1. Click on the Manage button to take you to your Group Members list. If you are a Manager for more than one group, ensure you select the Manage button next to the correct Group Name. (Refer to above example).



2. Look for the name of the user whose role you wish to change.

3. From the drop down list select the role you now wish this user to have – Manager or Member. You will receive a pop-up box asking if you are sure you wish to make this change.

4. Once a user's role has changed, an email is sent to the user to advise them of the role change.

**NEED TO KNOW**
- It is at your discretion how many users you set up as Group Manager for your Group.
- The EP Portal requires a minimum of one Group Manager per Group.
- If you are the only Group Manager, you will need to change a Member to a Manager role before you can change yourself to a Member.
- An email will be sent to the Group Manager and Member to advise that their role has been changed. Look for an email from energexportal@energex.com.au

# Change your Business Details



Under the My Groups area you can change any of your business details that were entered when your Group was first set up. This includes your Business Name, ABN, Physical Address or Group Contact Details. Only a user set up as **Group Manager** can update business details.

1. Click on the Manage button to take you to the Manage Group area. If you are a Manager for more than one group, ensure you select the Manage button next to the correct Group Name. (Refer to above example)

2. Update the required fields and click on Save Details.

3. An email will be sent to the Group Manager when changes are made to Group Details. Look for an email from energexportal@energex.com.au

# Subscribe to Another Group



When you register to the EP Portal you are asked to subscribe against your business's primary role. Once you are in the EP Portal, if you work for several businesses, you can now subscribe to additional Groups if required.

Click on Subscribe to another Group if you work for more than one business and subscribe to groups as required.

# Cancel your Subscription

You can cancel your additional subscription request under the My Groups area.

## Member

1.  If you subscribed as a Member to a Group, you will see under the My Status heading that your subscription is Pending Approval.

2.  To cancel this subscription request, click on Cancel Request.

3.  You will receive a prompt box confirming that you wish to cancel the pending subscription request which will remove it from the list. Click Yes to continue.

4.  You will no longer see your subscription request under My Groups as it has now been removed.

5.  When you cancel your pending subscription request, an email will be sent to the Group Manager and to your registered email address advising that your subscription request has been cancelled. Look for emails from energexportal@energex.com.au

## Group Manager

1.  If you have subscribed to a Group as Group Manager, there is no Cancel Request option.

2.  As a Group Manager you can only unsubscribe yourself from a group if there is another Group Manager set up.

3.  If you are the only user for your Group (set up as Group Manager), you will need to email us at energexportal@energex.com.au to disable your Group from the EP Portal.

# To Unsubscribe from a Group

You can remove your subscription from a Group at any time under the My Groups area.



## Member

1. Once your subscription has been approved an Unsubscribe button will display.

2. To remove yourself from a Group, click on Unsubscribe.  If you are a Member to multiple Groups,  ensure you unsubscribe from the correct Group.

3. You will receive a prompt box confirming that you wish to remove yourself from this Group. Click Confirm to continue.



4. Click on the Delete button that will now appear for you to remove the Group from your My Groups  area.

5. When you unsubscribe from a Group, an email will be sent to the Group Manager and to your registered email address advising that you have removed your subscription to that Group. Look for emails from energexportal@energex.com.au

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**NEED TO KNOW**

If you unsubscribe yourself from your only Group, your access to the EP Portal will be removed and you  will be taken back to the EP Portal Subscription page.  To access the EP Portal, you will need to  subscribe to another Group.

## Group Manager

1. As a Group Manager, you can only Unsubscribe yourself from a group if there is another Group Manager set up.  The EP Portal will not allow you to unsubscribe if you are the **only** Group Manager.

**My Groups**

| Group Name | Group Reference | My Role | My Status | | |
|---|---|---|---|---|---|
| Testing Electrical | Group Ref# 1111 EC# 0123 | Member | Approved | | Unsubscribe |
| Test Electrical | Group Ref# 1555 EC# 1234 | Manager | Approved | Manage | Unsubscribe |

2. If you are not the only Group Manager set up for the Group, click on Unsubscribe to be removed.

3. You will receive a prompt box confirming that you wish to remove yourself from this Group. Click Confirm to continue.

**My Groups**

| Group Name | Group Reference | My Role | My Status | |
|---|---|---|---|---|
| Test Electrical | Group Ref# 1555 EC# 1234 | Manager | Unsubscribed | Delete |

4. Click on the Delete button that will now appear for you to remove the Group from your My Groups  area.

5. When you unsubscribe from a Group, an email will be sent to the Group Manager and to your registered email address advising that you have removed your subscription to that Group. Look for emails from energexportal@energex.com.au

# Subscription Emails

Each time you create a new Group or join an existing Group within the EP Portal, you will receive emails which advise where your subscription status is at or what change you have made in the EP Portal. These emails will be generated for several reasons such as:

- A Group Manager subscribing to the EP Portal for the first time
- A Member subscribing to the EP Portal for the first time
- A Group Manager or Member unsubscribe from the EP Portal
- A Group Manager or Member is unsubscribed from the EP Portal by the Group Manager
- A Member cancels their pending subscription request under My Groups
- A Group Manager changes the role of a Member or Group Manager under My Groups
- A Group Manager updates any business details under My Groups
- A Group Manager or Member changes their email address under Manage My Notifications
- A Group Manager or Member changes their mobile number under Manage My Notifications

All users who are set up as Group Manager will receive emails. Look for emails from energexportal@energex.com.au