

Solar Victoria Portal – Retailer User Guide

Uploading a quote for solar battery installation

July 2023



Solar
Victoria



The purpose of this user guide is to walk you through completing a quote for a solar battery installation, as a Retailer participating in the Victorian Government's Solar Homes Program.

1

To access the Solar Victoria

Portal, enter your username and password. These are the details you provided when you were invited to join the portal. If you don't remember your password you can use the forgot password link to reset it.

Note: if you haven't previously registered for the Portal, check your email for an invitation or contact our customer experience team.



Username

Password

Log In

Remember me

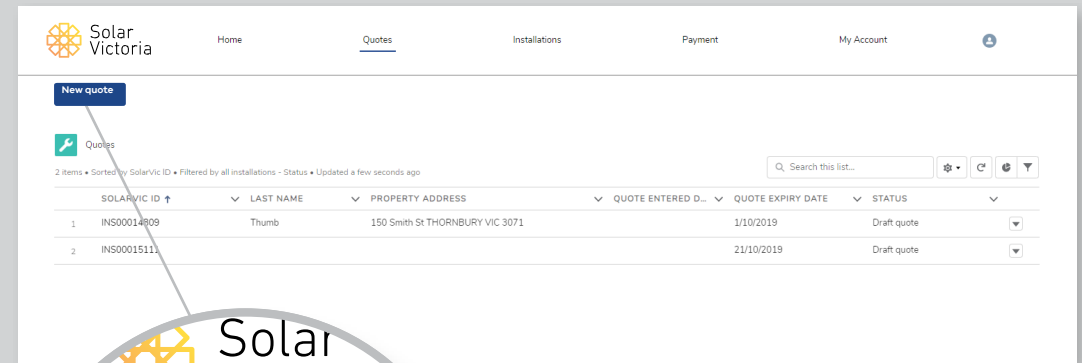
[Forgot your Password?](#)

2

In the portal you can create and keep track of quotes, manage installations, claim a payment, manage Installers, and edit your account details.

To create a new quote for a customer, go to the quote page.

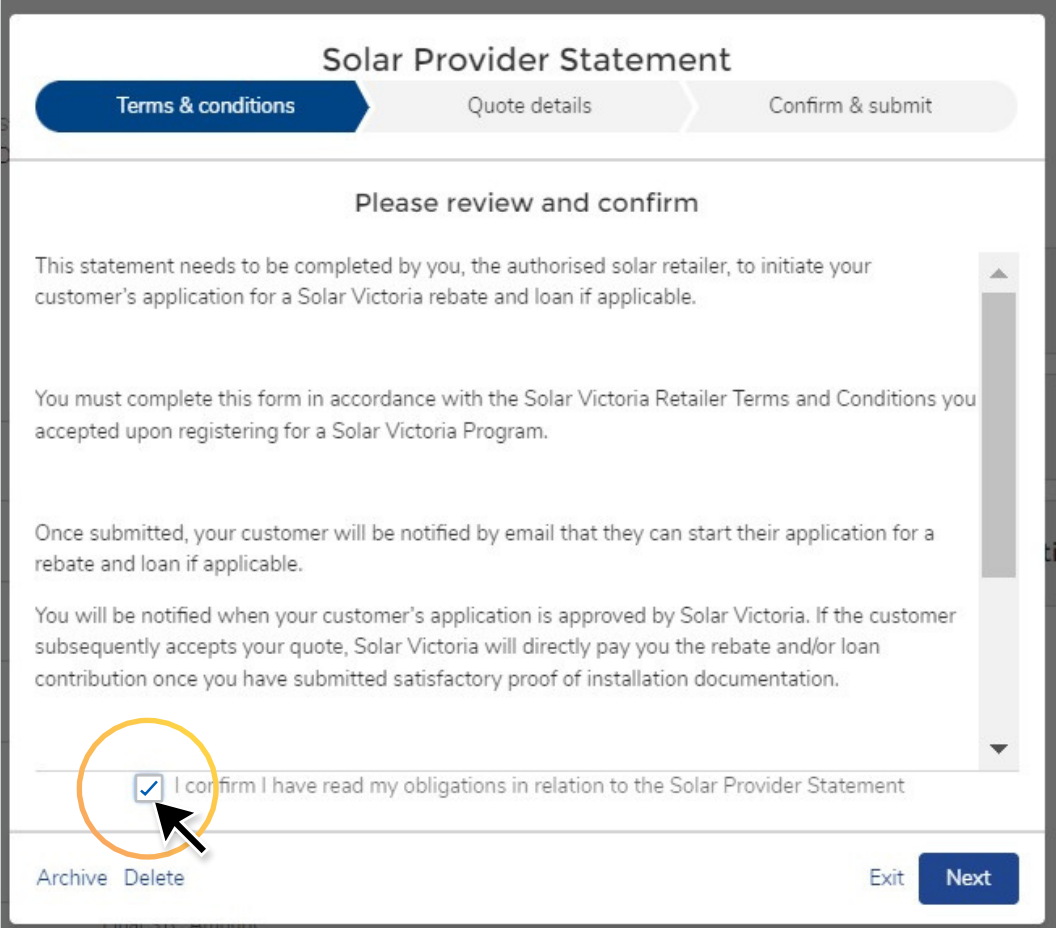
Click **New quote**



3

Review and confirm the Solar Provider Statement Terms & Conditions.

Once you've done this, tick the accept box, before clicking 'Next' to proceed to the quote details. This is required each time you create a new quote.



The screenshot shows a web interface titled "Solar Provider Statement". At the top, there is a progress bar with three steps: "Terms & conditions" (highlighted in blue), "Quote details", and "Confirm & submit". Below the progress bar, the heading "Please review and confirm" is centered. The main content area contains four paragraphs of text explaining the requirements for completing the statement. At the bottom of the text area, there is a checkbox that is checked, with a mouse cursor pointing to it. The text next to the checkbox reads "I confirm I have read my obligations in relation to the Solar Provider Statement". Below the checkbox, there are two buttons: "Archive" and "Delete". At the bottom right of the form, there are two buttons: "Exit" and "Next" (highlighted in blue).

Solar Provider Statement

Terms & conditions | Quote details | Confirm & submit

Please review and confirm

This statement needs to be completed by you, the authorised solar retailer, to initiate your customer's application for a Solar Victoria rebate and loan if applicable.

You must complete this form in accordance with the Solar Victoria Retailer Terms and Conditions you accepted upon registering for a Solar Victoria Program.

Once submitted, your customer will be notified by email that they can start their application for a rebate and loan if applicable.

You will be notified when your customer's application is approved by Solar Victoria. If the customer subsequently accepts your quote, Solar Victoria will directly pay you the rebate and/or loan contribution once you have submitted satisfactory proof of installation documentation.

I confirm I have read my obligations in relation to the Solar Provider Statement

Archive Delete

Exit Next

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Choose the 'Rebate or Loan Type' based on your customer's quote.

For a solar battery installation, choose 'Battery' from the drop-down menu.

Next, enter the date the quote is effective from as well as the customer's details (first name, last name, email address, and installation address).

Ensure all details are correct as these cannot be changed after quote submission.

Solar Provider Statement

Quote details

Confirm & submit

✓ Rebate or Loan

* Rebate or Loan Type

Battery

* Only battery loans are offered through Solar Homes Program

* Quote Effective date

26/06/2023

✓ Customer

* First Name

Jenna

* Last Name

Coleman

* Email

solarretailer@gmail.com

Installation Address

3 Circuit Drive, TRUGANINA VIC 3029

Property is part of a Lifestyle Village

In relation to the system and property identified in this Solar Provider Statement, I confirm that I have received a pre-approval to connect to the grid from the relevant DNSP, or do not require one. I have also discussed the pre-approval and any DNSP imposed restrictions on solar export with the customer.

Archive Delete

Exit Save and Exit

Previous Next

5

For solar battery installations, you must confirm that you have received pre-approval to connect to the grid from the relevant DNSP, and that you have discussed the pre-approval and any DNSP imposed restrictions on solar exports with your customer.

Solar Provider Statement

✓ Quote details Confirm & submit

Installation Address

Search Address

Property is part of a Lifestyle Village

In relation to the system and property identified in this Solar Provider Statement, I confirm that I have received a pre-approval to connect to the grid from the relevant DNSP, or do not require one. I have also discussed the pre-approval and any DNSP imposed restrictions on solar export with the customer.

∨ **Select Solar Products for Installation**

Please select equipment

* Total installed capacity for all batteries must be at least 6kWh

New Product

BATTERY PRODUCT QUANTITY

Archive Delete Exit Save and Exit Previous Next

6

Add the battery products you've quoted by clicking 'New Product'. Then search for the product from the list. Include the quantity required.

Total installed capacity for all batteries must be at least 6kWh.

Solar Provider Statement

Quote details

Confirm & submit

✓ Select Solar Products for Installation

Please select equipment

* Total installed capacity for all batteries must be at least 6KwH

New Product

| BATTERY PRODUCT | QUANTITY |
|---|----------|
| Tesla Powerwall 2 AC wth Backup Gateway | 1 |

✓ Customer Benefits

* In line with the CEC Code Of Conduct 2.1.6 (e), we have carried out a site-specific full system design.

* No solar battery system has been previously installed at this address.

Performance estimate (PV Panels only)

Estimated financial saving against current consumption (annual, \$):

10000

Archive Delete Exit Save and Exit Previous Next

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Tick the check box to confirm you have provided this to your customer.

Then tick the check box to confirm no solar battery has been previously installed at this address.

Enter your estimate of the benefits to the customer for solar panels (PV). Note: You have a duty of care to perform a site-specific system design for the site in accordance with Clean Energy Council regulations.

Solar Provider Statement

Quote details

Confirm & submit

✓ Select Solar Products for Installation

Please select equipment

* Total installed capacity for all batteries must be at least 6KwH

New Product

| BATTERY PRODUCT | QUANTITY |
|---|----------|
| Tesla Powerwall 2 AC wth Backup Gateway | 1 |

✓ Customer Benefits

- In line with the CEC Code Of Conduct 2.1.6 (e), we have carried out a site-specific full system design.
- No solar battery system has been previously installed at this address.

Performance estimate (PV Panels only)

Estimated financial saving against current consumption (annual, \$):

10000

Archive Delete Exit Save and Exit Previous Next

8

Enter your quote reference number.

Note: Your customer will use this reference number to find their quote in the portal when they apply for eligibility.

The quote reference can be letters or numbers and must be less than twenty characters long.

The screenshot displays a 'Solar Provider Statement' form with a progress bar at the top showing 'Quote details' as the current step. The form includes several input fields and calculated values:

- Year quote reference:** BLP2606 (highlighted with a yellow circle)
- Total price(inc GST) before Solar Home Program loan:** \$10,000.00
- Loan Amount:** \$8,800
- GST @ 10%:** \$909.09
- Price before Solar Program loan (inc GST):** \$10,000.00
- Loan Term (months):** 48
- Estimated Net payable by customer (inc GST):** \$1,200.00
- Estimated monthly installments payable by customer:** \$183.33
- Installed or Planned System Capacity – PV Panels (kilowatts):** 30.00

At the bottom of the form, there are navigation buttons: 'Archive', 'Delete', 'Exit', 'Save and Exit', 'Previous', and 'Next'.

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Enter the total cost of the battery supply and install in the next field.

Enter the loan amount for the customer.

The total installed system cost must be equal to or greater than the Loan Amount. The loan amount cannot be less than \$1,000 or exceed \$8,800.

The screenshot displays a 'Solar Provider Statement' form with a progress bar at the top. The progress bar has three steps: a first step with a checkmark, a second step labeled 'Quote details' which is currently active, and a third step labeled 'Confirm & submit'. Below the progress bar, the 'Quote Details' section is expanded. It contains several input fields and calculated values:

- * Your quote reference** (with an information icon): BLP2606
- * Total price (inc GST) before Solar Home Program loan**: \$10,000.00 (circled in yellow)
- * Loan Amount** (with an information icon): \$8,800 (circled in yellow)
- GST @ 10%**: \$909.09
- Price before Solar Program loan (inc GST)**: \$10,000.00
- Loan Term (months)**: 48
- Estimated Net payable by customer (inc GST)** (with an information icon): \$1,200.00
- Estimated monthly installments payable by customer** (with an information icon): \$183.33
- * Installed or Planned System Capacity – PV Panels (kilowatts)**: 30.00

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Please enter the 'Installed or Planned System Capacity for the PV Panels (kilowatts)'. The capacity must be equal to, or greater than, 5kW.

Next, add a 'Quote Expiry Date'.

You can leave this blank, and it will automatically set the expiry date three months from the date you raise the quote, or you can change this to an earlier date if you choose to.

Finally, upload a copy of the quote.

Note that the quote document cannot exceed 6mb in size.

Click 'Next' to proceed to the confirmation page, or click 'Save and exit' to save a draft.

The screenshot displays the 'Solar Provider Statement' form with the following details:

- Progress:** A navigation bar at the top shows 'Quote details' as the active step, with a checkmark on the previous step and 'Confirm & submit' as the next step.
- Loan Term (months):** 48
- Estimated Net payable by customer (inc GST):** \$1,200.00
- Estimated monthly installments payable by customer:** \$183.33
- * Installed or Planned System Capacity – PV Panels (kilowatts):** A text input field containing '30.00', which is circled in yellow.
- Quote Expiry Date:** A date picker field, also circled in yellow.
- Upload Quote:** A section with a note 'Uploads are subject to size limit of 6 MB'. It features a 'Quote' label, an 'Upload Files' button (circled in yellow), and the text 'Or drop files'. Below this is a '+ Additional Pages' button.
- Footer:** Navigation buttons for 'Archive', 'Delete', 'Exit', 'Save and Exit', 'Previous', and 'Next'.

11

Review and confirm the 'Solar Provider Statement', ticking the declaration box at the bottom of the statement before clicking 'Submit' to finalise this statement.

The screenshot displays a web form titled "Solar Provider Statement". At the top, a progress bar shows three steps: the first two are completed (indicated by checkmarks), and the third, "Confirm & submit", is the current active step. Below the progress bar, the text "Please review and confirm" is centered. The main content area is titled "Safety" and contains a paragraph stating that safety and compliance are the highest priorities for the Solar Homes program. It lists four requirements for the installation: 1) conducted by a CEC accredited installer, 2) by an installer with a current unrestricted Class A Electrical Licence, 3) by an installer with no prosecutions in the past 3 years, and 4) by an installer ensuring safe work methods. At the bottom of the form, there is a checkbox labeled "I, Solar Retailer, agree to this statement on behalf of Solar Retailer", which is checked and circled in orange. A black arrow points to this checkbox. At the bottom right, there are three buttons: "Exit", "Previous", and "Submit". The "Submit" button is also circled in orange. At the bottom left, there are links for "Archive" and "Delete".