

Retailer Portal Uplift

Industry Webinar

Date: 19 May 2025

Host: The Solar Victoria Team



solar.vic.gov.au

OFFICIAL



We acknowledge and respect Victorian Traditional Owners as the original custodians of Victoria's land and waters, their unique ability to care for Country and deep spiritual connection to it.

We honour Elders past and present whose knowledge and wisdom has ensured the continuation of culture and traditional practices.

DEECA is committed to genuinely partnering with Victorian Traditional Owners and Victoria's Aboriginal community to progress their aspirations.

Meet the speakers



Guy Pritchard,
Director,
Incentive Programs
Solar Victoria



Helen Town,
Change Officer
Solar Victoria



James Ovens,
Escalation Officer
Solar Victoria



Ronaldo Dela Cruz,
Senior Salesforce
Solution Architect
Solar Victoria

Format of this session and what will be covered

Agenda

- Enhancements to the retailer portal
- Portal demonstration
- Q&A time

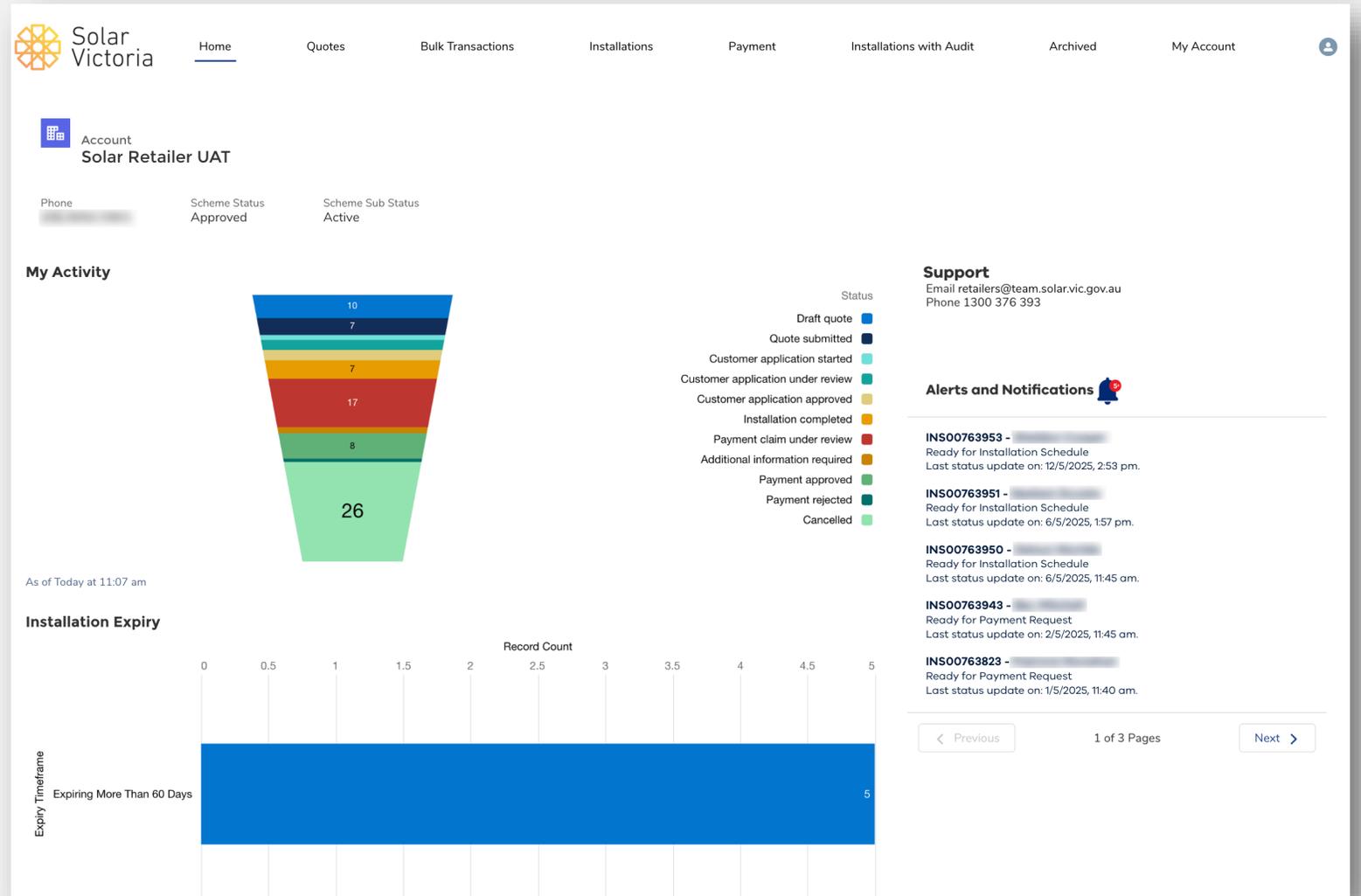


Enhancements to the Retailer Portal – Dashboard update

Retailer Portal homepage

The dashboard reflects your account activities with drilldown functionality.

- Installations statuses
- Expiry timelines
- Alerts and notifications



Enhancements to the Retailer Portal – Installation statuses

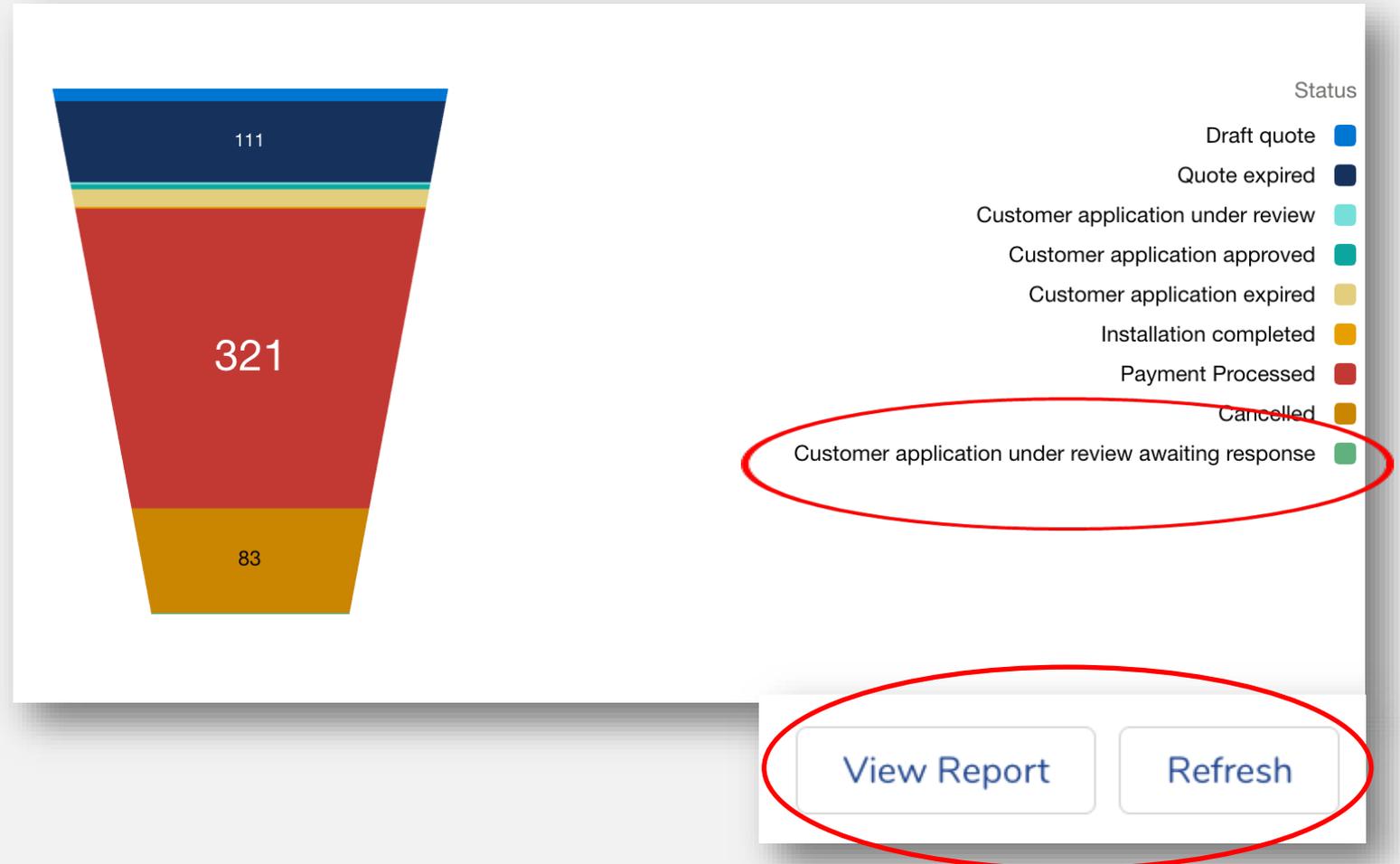
This section of the dashboard shows the status of all the installation records.

From here

- **Refresh** the data
- Drill down and **View Report**

Introducing a New Status

‘Customer application under review awaiting response’



Enhancements to the Retailer Portal – View reports

 Report: Installations
My Activity
Report showing status of all installation records from quote through to payment.

[Enable Field Editing](#) [Search](#) [Share](#) [Filter](#) [Refresh](#) [Export](#)

Total Records	Total Total installed system cost (i...	Total Final STC Amount	Total Final Loan Amount	Total Final Rebate Amount	Total Calculated Net Amount
11	\$115,863.00	\$9,681.00	\$16,800.00	\$11,550.00	\$94,332.00

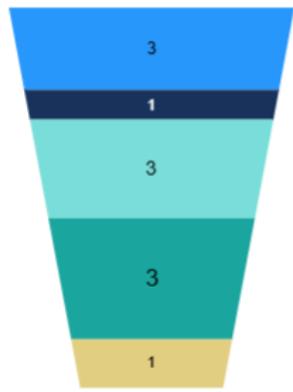
Filters Close Filter Panel

Show Me
All installations

Quote Expiry Date
All Time

Program Type
equals Standard Application ✕

Record Count: 11



Activity

- Quote submitted ■
- Customer application approved ■
- Payment claim under review ■
- Additional information required ■
- Customer application under review awaiting response ■

<input type="checkbox"/> Status ↑	<input type="checkbox"/> Quote Reference	<input type="checkbox"/> Installation: SolarVic ID	<input type="checkbox"/> Property Address	<input type="checkbox"/> Total installed system cost (inc G
<input type="checkbox"/> Quote submitted (3)	QA12312	INS00759587		\$13,000

Row Counts Detail Rows Subtotals Grand Total

Enhancements to the Retailer Portal – Alerts & Notifications

- This feature is a list of actions you must take for standard applications:
 - Scheduling Installation
 - Request Payment
 - Payment Request Requires Additional information
- Facility to filter and sort in the Notification Settings

Notification Settings

Schedule Installation Notifications



Payment Request Notifications



Alerts and Notifications

INS00779206 - Pranathi A

Payment request requires additional information

Last status update on: 27/02/2025 12:00 PM.

INS00780224 - Test AA

Ready for Installation Schedule

Last status update on: 3/03/2025 11:43 AM.

INS00780228 - Test BB

Ready for Installation Schedule

Last status update on: 3/03/2025 11:44 AM.

INS00780227 - Test DD

Ready for Installation Schedule

Last status update on: 3/03/2025 11:45 AM.

INS00780226

Ready for Installation Schedule

Last status update on: 3/03/2025 11:45 AM.

< Previous

1 of 2 Pages

Next >

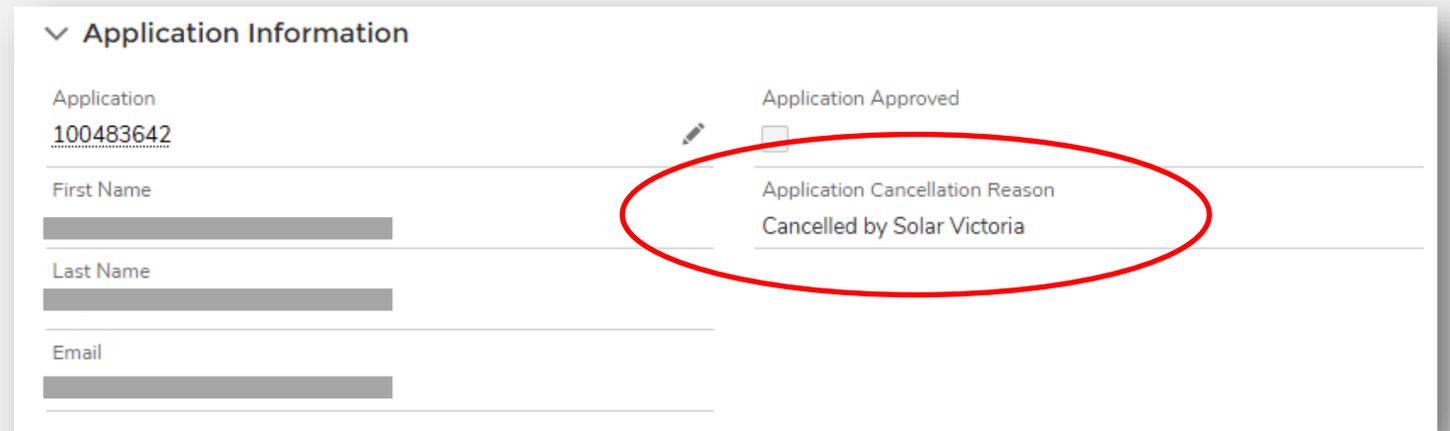
Enhancements to the Retailer Portal – Cancelled applications

Visibility on the Cancelled Application

On the installation record the Status will show as Cancelled.

New field that will provide the
‘Application Cancellation Reason’

- Customer initiated cancellation
- Timed out
- Cancelled by Solar Victoria



Application Information

Application <u>100483642</u>	Application Approved <input type="checkbox"/>
First Name [Redacted]	Application Cancellation Reason Cancelled by Solar Victoria
Last Name [Redacted]	
Email [Redacted]	

The screenshot shows a form titled "Application Information" with several fields. The "Application" field contains the number "100483642". The "Application Approved" field has an unchecked checkbox. The "Application Cancellation Reason" field is circled in red and contains the text "Cancelled by Solar Victoria". Other fields for "First Name", "Last Name", and "Email" are redacted with grey bars.

Enhancements to the Retailer Portal – Quote Improvements

Product Search and Display

The search field has been increased to provide better visibility of the product name.

And the search results displayed have been increased from 5 to 10.

✓ **Select Solar Products for Installation**

Please enter all major equipment items (e.g. panels, inverters).

New Product

PRODUCT	QUANTITY	
Solar	0	
Alpha ESS SMILE5-BAT (x3) w/ Shenzhen SOFAR SOLA... Alpha ESS/Shenzhen SOFAR SOLAR Co Ltd		
Alpha ESS SMILE5-BAT (x2) w/ Shenzhen SOFAR SOLA... Alpha ESS/Shenzhen SOFAR SOLAR Co Ltd		
Force 3S (AS4777-2 2020) 8 Star Energy Pty Ltd		
Force 3.6S (AS4777-2 2020) 8 Star Energy Pty Ltd		
Force 5S (AS4777-2 2020) 8 Star Energy Pty Ltd		

ried out a site-specific full system

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

Performance estimate (PV Panels only)

Estimated energy yield (annual performance in kWh):

Enhancements to the Retailer Portal – Quote Improvement

Discount changes on Quote Screen

Capturing Total Cost to the Customer after ALL Discounts:

Question: Are there any other discounts not factored in the total price?

If yes, enter the total cost to the customer after ALL discounts including STCs and any discounts offered by the Retailer.

Tick box declaration to confirm

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

- Progress:** A progress bar at the top shows 'Quote details' as the current step, with 'Confirm & submit' as the next step.
- Financial Summary:**
 - GST @ 10%: \$1,818.18
 - Price before Solar Program loan (inc GST): \$20,000.00
 - Loan Term (months): 48
 - Estimated Net payable by customer (inc GST): \$12,000.00
 - Estimated monthly installments payable by customer: \$166.67
- System Capacity:** A field for '* Installed or Planned System Capacity – PV Panels (kilowatts)' contains the value '20.00'.
- Total Cost:** A field for '* Total cost to customer after ALL discounts (including STCs and any discounts offered by the retailer) are applied' contains the value '8000'. This field is highlighted with a red border and has a red error message below it: 'Complete this field.'
- Declaration:** A checkbox is present for the statement: 'I confirm the quote amount includes all price reductions including any sales, promotional or early payment discounts offered by my business. I am aware that failure to report all discounts is in breach of Solar Victoria's retailer terms and conditions and may result in suspension or cancellation from the Solar Homes Program'.
- Quote Expiry Date:** A date selection field is provided.
- Quote Upload:** A section for 'Upload Quote' with a note 'Uploads are subject to size limit of 6 MB'. It includes an 'Upload Files' button, 'Or drop files' text, and a trash icon.
- Footer:** Navigation buttons include 'Archive', 'Delete', 'Exit', 'Save and Exit', 'Previous', and 'Next'.

Retailer Portal – Payment Request

Discount changes confirmation on the Request Payment Screen

Capturing Total Cost to the Customer after ALL Discounts:

Enter the total cost to the customer after ALL discounts including STCs and any discounts offered by the Retailer.

Tick box declaration to confirm

Request Payment

Review Installed Products | Upload Documents | Submit Installation

* Electrical installation worker licence no. ?
a1234

* Inspector/Certifier of the electrical installation work ?
Joan Hendrix

* NMI ?
1234571235

* Total installed system cost (inc GST) before Solar Homes Program loan ?
\$12,000.00

* Total cost to customer after ALL discounts (including STCs and any discounts offered by the retailer) are applied
8,000.00

I confirm the quote amount includes all price reductions including any sales, promotional or early payment discounts offered by my business. I am aware that failure to report all discounts is in breach of Solar Victoria's retailer terms and conditions and may result in suspension or cancellation from the Solar Homes Program

Select Products New Product

PRODUCT	QUANTITY	REASON FOR CHANGE
Maxeon Solar Technologies Ltd. RESERVE-BAT1-DC-10.1P-INT(x6) w/ Maxeon S ×	1	

Retailer Portal – Payment request, additional information required

On completion of an installation

Retailers will complete the Payment Request; this then prompts our CX payments team to review the payment claim and action.

Following the review, if additional information is required to further support the payment claim, then the CX payments team will make a request.

- The request will trigger:
 - An email request and,
 - a notification alert
- A new Status field will appear on the INS record, '**Additional information required**'

Alerts and Notifications



INS00779206 - Pranathi A

Payment request requires additional information
Last status update on: 27/02/2025 12:00 PM.

Retailer Portal – Payment requesting additional information

When additional information is requested to support a payment claim.

This triggers;

- An email detailing the required information and
- A prompt in the Alerts and Notifications

Alerts and Notifications 

INS00779206 - Pranathi A
Payment request requires additional information
Last status update on: 27/02/2025 12:00 PM.

 Solar Victoria 

Hi Solar Retailer

On review of the Installation INS00752479, further action is required by you.

The rebate request cannot be finalised due to the following :
CES: Installer does not match portal

The following action is required by you to complete the process:
test

Click [here](#) to take action and re-submit the installation for review.

For more information about the requirement for participation in our programs and our focus on safety and quality, see solar.vic.gov.au/industry

Alternatively, contact us at retailers@team.solar.vic.gov.au or 1300 376 393, Monday to Friday 9am to 5pm (except public holidays).

Kind regards,
The Solar Victoria team

Solar Victoria is a Victorian Government Agency delivering the Solar Homes Program. 

Retailer Portal – Payment requesting additional information

Click on either the link in the email or the notification alert

This will drill down into the INS record, select:

Additional information

A new pop-up will appear showing what information is required to support the payment claim.

Use the drop-down field to select the document you are ready to up-load.

On completion click SAVE to save and submit.

The installation status will update to **‘Payment claim under review’**.

Additional Information Required

Reasons : CES: Incorrect installation address
Additional Information : Tax Invoice;VBA Certificate
Comments : Additional Information required

File Upload
List of documents required:

Tax Invoice Or drop files

Additional Information Required

Reasons : CES: Incorrect installation address
Additional Information : Tax Invoice;VBA Certificate
Comments : Additional Information required

File Upload
List of documents required:

Select an Option Or drop files

Files Uploaded

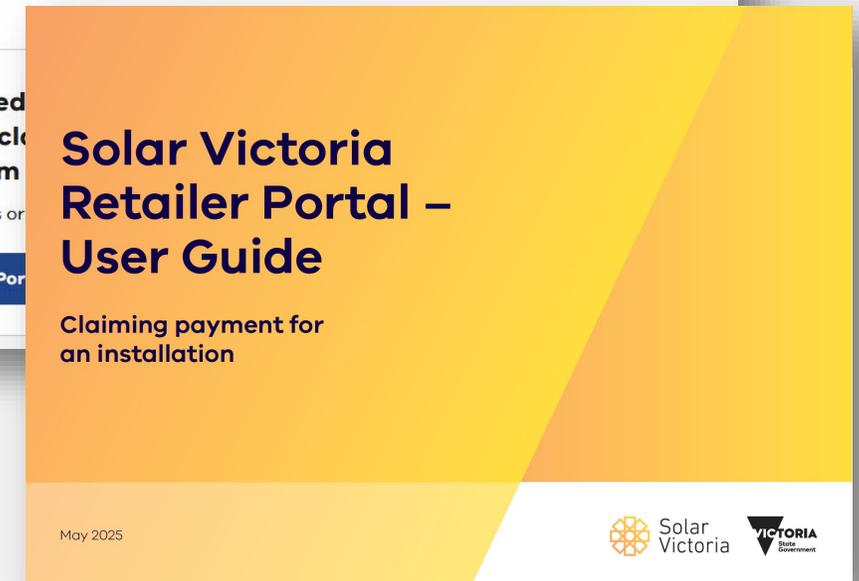
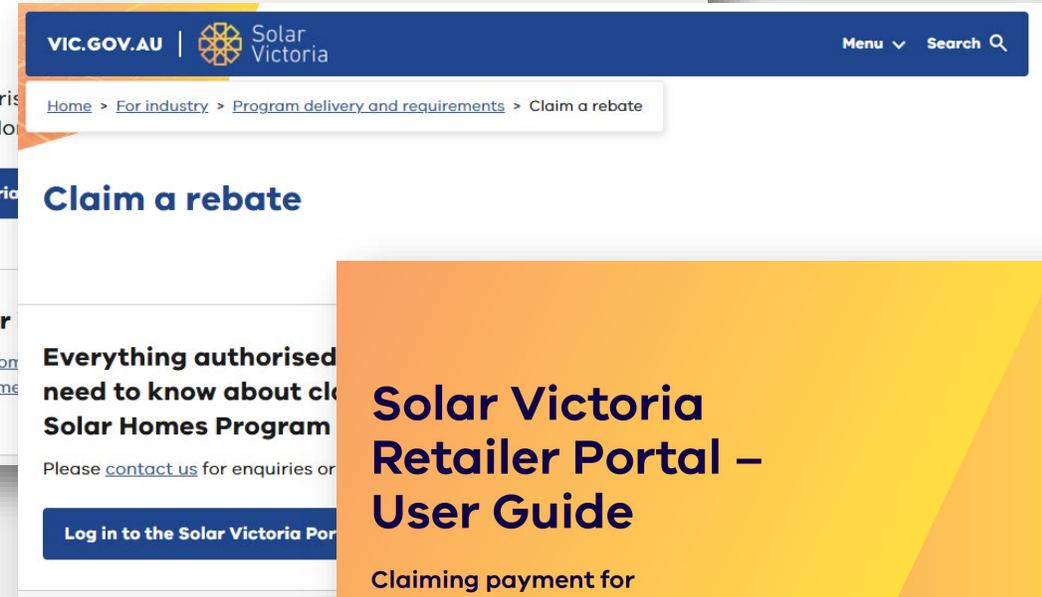
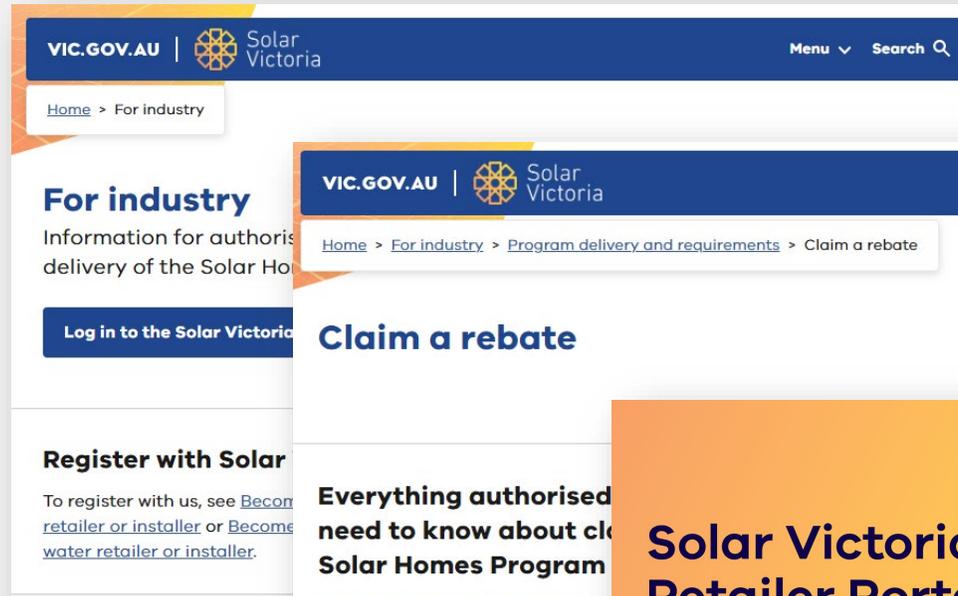
DOCUMENT NAME	DOCUMENT TYPE	UPLOADED DATE	
Lightning Experience.pdf	Tax Invoice	07/04/2025, 02:35 pm	<input type="button" value="Remove"/>
Loan Document.pdf	VBA Certificate	07/04/2025, 02:36 pm	<input type="button" value="Remove"/>

Website and User Guides

Everything authorised retailers need to know about claiming a Solar Homes Program rebate.

On this page:

- Portal registration process
- Using the portal
- Application status
- Uploading a quote
- Scheduling an installation
- Organising installations by sorting
- Requoting
- Accessing accreditations and scanning QR codes
- Claiming a payment
- Invoices, STC and GST



Hand over for demonstration



solar.vic.gov.au

OFFICIAL



Q&A



solar.vic.gov.au

OFFICIAL



Thank you



solar.vic.gov.au

OFFICIAL

