

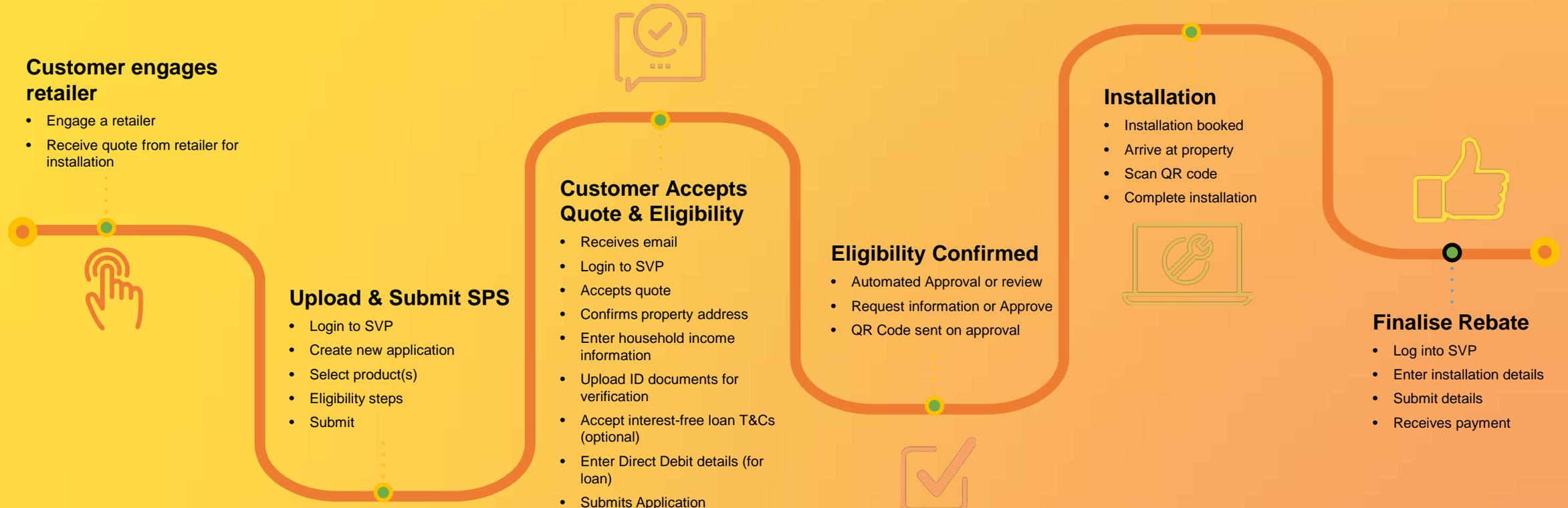


Solar  
Victoria

# Solar Victoria Portal Industry User Guide

# Rebate process

SVP





Solar  
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1. Registering as a retailer
2. Creating a quote
3. Scheduling an installation
4. Registering as an installer
5. Confirming customer eligibility
6. Claiming payment for an installation



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# 1. Registering as a retailer

# Registering as a retailer

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## STEP 1: AUTOMATED WELCOME EMAIL

Click the link in the welcome email to begin registration process.

Register now to become a Solar Retailer in the Solar Homes Program



Please take a moment to register on the new Solar Victoria Portal.

If you haven't done so already, you need to achieve CEC Code of Conduct Approved Solar Retailer status by the notified dates and register on the Solar Victoria Portal in order to participate in the Solar Homes program.

[Click here to register](#)

To find out more information about why you need to register and some basic instructions please visit [www.solar.vic.gov.au](http://www.solar.vic.gov.au)

# Registering as a retailer

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## STEP 2: PORTAL LOG IN PAGE

Create a password that conforms to the password rules.

The screenshot shows a web form titled "Change Your Password". The form is set against a light gray background with a blue cloud-like graphic at the top. The main content area is white. It contains the following elements:

- Title:** "Change Your Password"
- Instruction:** "Enter a new password for mick.w.davies+14@pwc.com. Make sure to include at least:"
- Rules:** Three radio button options: "8 characters", "1 letter", and "1 number".
- Input Fields:** Two text input fields. The first is labeled "\* New Password" and is highlighted with an orange border. The second is labeled "\* Confirm New Password".
- Button:** A gray button labeled "Change Password".
- Feedback:** A line of text below the button stating "Password was last changed on 6/05/2019 3:52 PM."
- Footer:** "© 2019 salesforce.com. All rights reserved."

# Registering as a retailer

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## STEP 3: ACCEPT TERMS AND CONDITIONS

Check the tick boxes to acknowledge acceptance of terms and conditions.

### Enter registration details

response/application;

**Change to the Retailer's installation practices**

25. At Solar Victoria's direction, a Retailer must stop, either temporarily or permanently:

- a. using an Installer identified by Solar Victoria as having unacceptable levels of compliance as part of any Compliance Audit; or
- b. an Installer from using a licensed electrical inspector

**Retailer acknowledgments**

26. Each Retailer acknowledges and agrees to the following as part of its participation in the Solar Homes Program:

- a. That the Payment claimed under the Solar Homes program has been used by the Retailer to exclusively fund the installation required to install the Solar System;
- b. Solar Victoria may publish publicly from time to time, the compliance performance of Retailers or their nominated Installers based on results from the Compliance Audit;
- c. Solar Victoria may produce a public notice advising of the suspension or permanent removal of a Retailer from the Solar Homes Program;
- d. Any information provided to Solar Victoria in connection with compliance, rectification or adverse Compliance Audit findings may also be provided to relevant regulators and the CEC;
- e. Solar Victoria may refuse to pay, or recover (independently or as part of subsequent Payment claims) any amount claimed for a Solar System installed at a Property which is found to be unsafe as part of a Compliance Audit.

Yes, I have confirmed that our organisation agrees to abide by the terms and conditions of participation in the Solar Homes Program

I confirm that I am authorised to accept these terms and conditions on behalf of my organisation

Next

*After completing this step an email will be sent to you containing a PDF version of T&C's.*

# Registering as a retailer

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## STEP 4: ADD BANK ACCOUNT DETAILS

Enter BSB and Bank Account Number into the relevant fields.

A screenshot of a web form titled "Enter registration details". The form has a light gray border and contains the following elements:

- A header section with the text "Enter registration details".
- A sub-header section with the text "Please enter bank details".
- A field labeled "\*BSB" with the value "129821" entered.
- A field labeled "\*Bank Account Number" with the value "1930272" entered.
- An orange "Submit" button at the bottom right.

*After completing this step an email will be sent to you confirming your registration.*

# Registering as a retailer

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## STEP 5: PORTAL LOG IN



Username

Password

Log In to Sandbox

Remember me

[Forgot Your Password?](#)

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## 2. Creating a quote

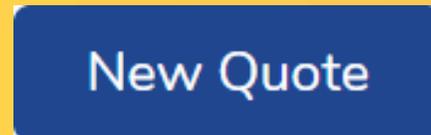
# Creating a quote

SVP



## 1. Click on the 'New Quote' button

From the home page, click on...



The screenshot shows the Solar Victoria web application interface. At the top left is the Solar Victoria logo. A navigation menu includes "Home", "Quotes" (which is underlined), "Installations", "Payment", "Manage Installers", and "My Account". Below the navigation is a blue "New Quote" button. Underneath is a "Quotes" section with a wrench icon. Below that, there is a summary line: "14 items • Sorted by SolarVic ID • Filtered by all installations - Status • Updated a few seconds ago". To the right of this line is a search box with the placeholder text "Search this list..." and a settings gear icon. Below the search box is a table with the following columns: "SOLARVIC ID", "LAST NAME", "PROPERTY ADDRESS", "QUOTE ENTERED DA...", "QUOTE EXPIRY DATE", and "STATUS". The table contains one row of data:

SOLARVIC ID	LAST NAME	PROPERTY ADDRESS	QUOTE ENTERED DA...	QUOTE EXPIRY DATE	STATUS
1	INS00000300	Nine	1 McNab Ave FOOTSCRAY VIC 3011	11/09/2019	Draft quote

# Creating a quote

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## 2. Confirm Conditions

Read the Solar Provider Statement terms and conditions. You are required to confirm an acknowledgement of the conditions by checking the “I confirm I have read and understand the above” box to progress.

A screenshot of a web form 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 three paragraphs of text explaining the statement's purpose, notification process, and the provider's responsibility. At the bottom right, there are two buttons: "Cancel" and "Next".

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

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

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 loan contribution once you have submitted satisfactory proof of installation documentation.

As an Authorised Solar Provider, and in accordance with the Solar Homes Retailer Terms and Conditions that you have accepted, you are responsible for ensuring that the information you

Cancel Next

# Creating a quote

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## 3. Complete all the **required fields** for the application:

- Contact details
- Product information
- Customer Benefits
- Quote Details

A screenshot of a web form titled "Solar Provider Statement". The form is divided into three steps: a green arrow with a checkmark, a blue arrow labeled "Quote details", and a grey arrow labeled "Confirm & submit". The "Quote details" section is expanded, showing several required fields marked with an asterisk: "First Name", "Last Name", and "Email", each with a corresponding text input box. Below these is a radio button selection for "Landlord or Owner Occupier" with options "Landlord" and "Owner Occupier". There is also a "Search Address" input box with a magnifying glass icon. A link labeled "Select Solar Products for Installation" is visible. The "Customer Benefits" section includes a checkbox for "In line with the CEC Code Of Conduct 2.1.6 (e), we have carried out a site-specific full system design." Below this are two more input boxes: "Performance estimate (PV Panels only)" for "Estimated energy yield (average daily performance in kWh)" and "Estimated financial saving against current consumption (yearly, \$)". At the bottom of the form are buttons for "Cancel", "Save and Exit", "Previous", and "Next".

# Creating a quote

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## 4. Upload the Quote

Upload Quote

Quote

 Upload Files Or drop files 

Cancel Save and Exit Previous Next

The screenshot shows a web interface for uploading a quote. At the top, the title "Upload Quote" is displayed. Below it is a large text input area labeled "Quote". In the center of this area is a dashed border indicating a file drop zone, containing an "Upload Files" button with an upward arrow icon and the text "Or drop files". To the right of the drop zone is a trash can icon. At the bottom of the interface, there are four buttons: "Cancel", "Save and Exit", "Previous", and "Next". The "Previous" and "Next" buttons are highlighted in orange.

5. Click **Next** to proceed



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# 3. Scheduling an installation

# Scheduling an installation

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1. Go to the 'Installations' tab of the portal and select an installation

The screenshot shows the Solar Victoria portal interface. At the top, there is a navigation bar with the Solar Victoria logo on the left and several menu items: Home, Quotes, Installations (which is underlined and selected), Payment (also underlined), Manage Installers, and My Account. Below the navigation bar, there is a section titled "Installations" with a green wrench icon and a star icon. Underneath this title, it says "14 items • Sorted by Status • Filtered by all installations - Status • Updated a few seconds ago". To the right of this text is a search bar with the placeholder "Search this list..." and two icons: a gear for settings and a grid for view options. Below the search bar is a table with the following columns: SOLARVIC ID, QUOTE REFE..., LAST NAME, PROPERTY ADDRESS, QUOTE ENTER..., QUOTE EXPIRY..., and STATUS. The first row of the table contains the following data: 1, INS00000269, AB-001, Potter, 1 McNab Ave FOOTSCRAY VIC 3011, 11/09/2019, and Customer application started.

SOLARVIC ID	QUOTE REFE...	LAST NAME	PROPERTY ADDRESS	QUOTE ENTER...	QUOTE EXPIRY...	STATUS
1	INS00000269	AB-001	Potter	1 McNab Ave FOOTSCRAY VIC 3011	11/09/2019	Customer application started

# Scheduling an installation

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## 2. Click on 'schedule installation'

Home Quotes Installations Payment Manage Installers My Account

[Schedule Installation](#) [Request Payment](#)

 Installation  
INS00000268

Customer

First Name  
GreenOne

Last Name  
Battery

Positive Estimated Benefits

Email  
battery\_1@test.com

Quote

Quote Reference  
B0101

Quote Amount  
\$15,000.00

Quote Rebate Amount  
\$4,838.00

Quote Loan Amount  
\$0.00

Quote Entered Date

Quote Expiry Date  
11/09/2019

Final Amount

Final STC Amount

Installation

SolarVic ID  
INS00000268

Schedule Date

Installers (0)

Products (1)

AUTHORISE...	STATUS	REASON FOR ...	QUANTITY
AC Battery L...	Approved		1

Documentation (0)

# Scheduling an installation

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## 3. Select an installation date

The screenshot displays the Solar Victoria web application interface. At the top, there is a navigation bar with the Solar Victoria logo and links for Home, Quotes, Installations, Payment, Manage Installers, and My Account. Below the navigation bar, there are two buttons: "Schedule Installation" and "Request Payments".

The main content area shows details for an installation with ID "INS00000268". It includes sections for Customer information (First Name: GreenOne, Last Name: Battery), Quote details (Quote Reference: B0101, Quote Amount: \$15,000.00, Quote Rebate Amount: \$4,838.00, Quote Loan Amount: \$0.00, Quote Entered Date, and Quote Expiry Date: 11/09/2019), and an Installers section.

A "Schedule Installation" modal is open in the center of the screen. It features a text input field labeled "\* Scheduled Date" and a calendar widget. The calendar is set to June 2019 and shows the date 17th as selected. The calendar grid is as follows:

Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27	28	29	30	31	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	1	2	3	4	5	6

The modal also includes a "Today" button at the bottom.



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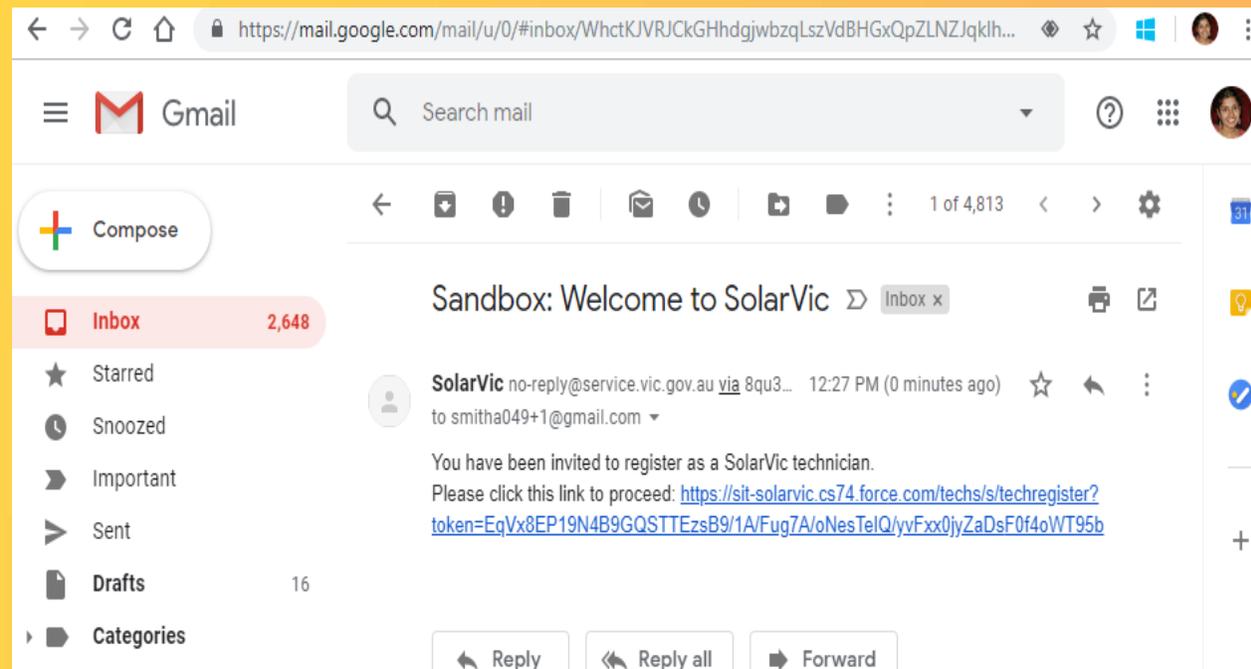
# 4. Registering as an installer

# Registering as an installer

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## 1. Eligible installers should receive a registration email

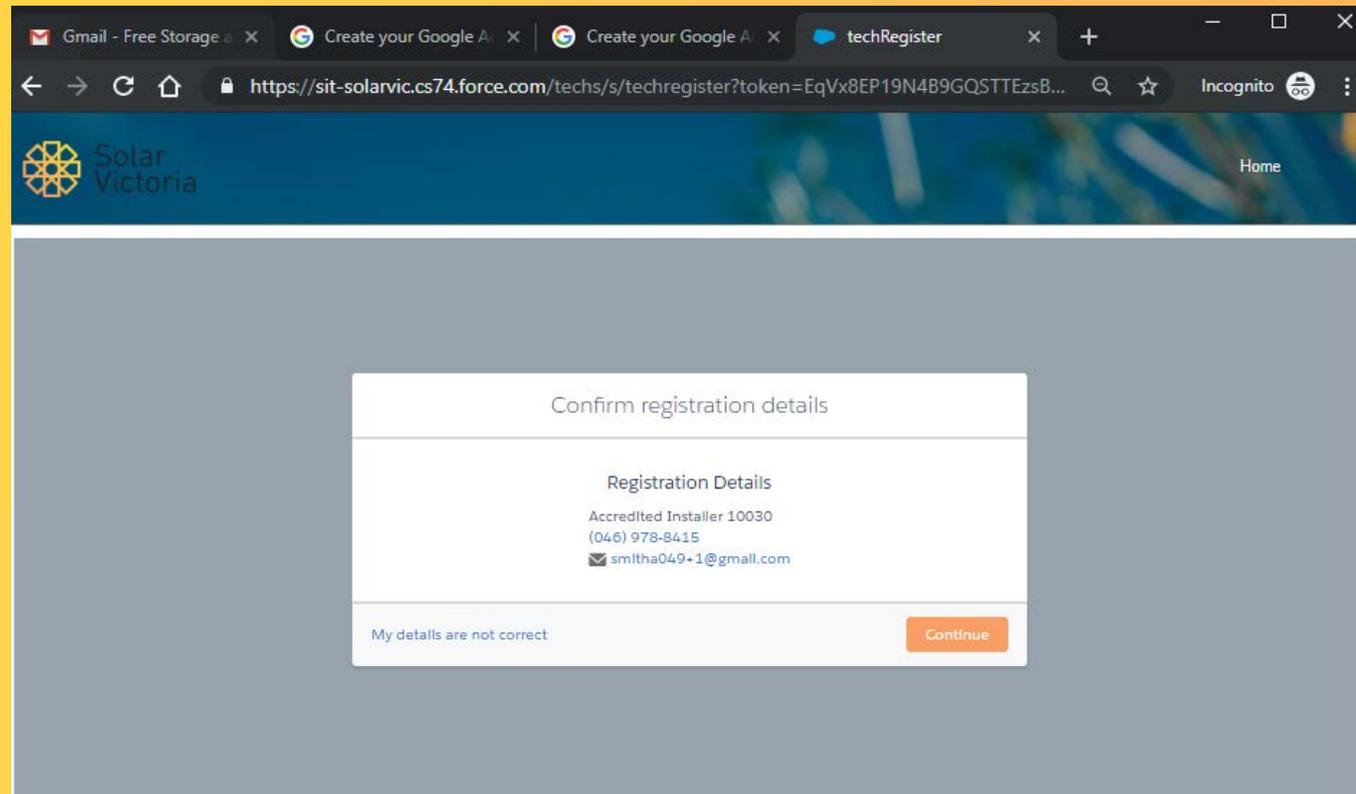


# Registering as an installer

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2. Follow the invitation link to go to this page

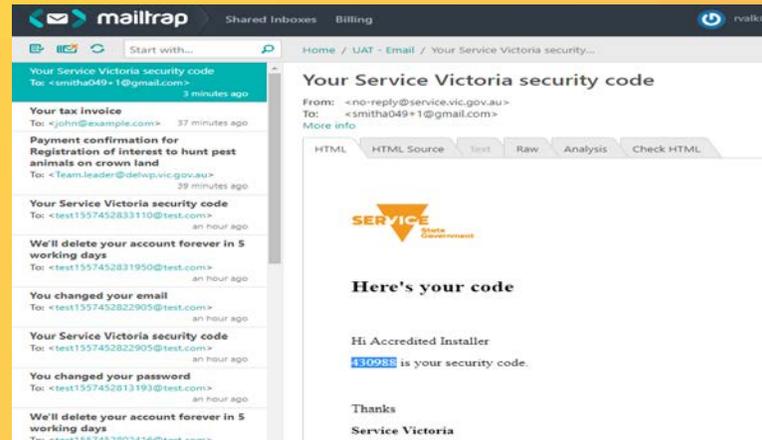


# Registering as an installer

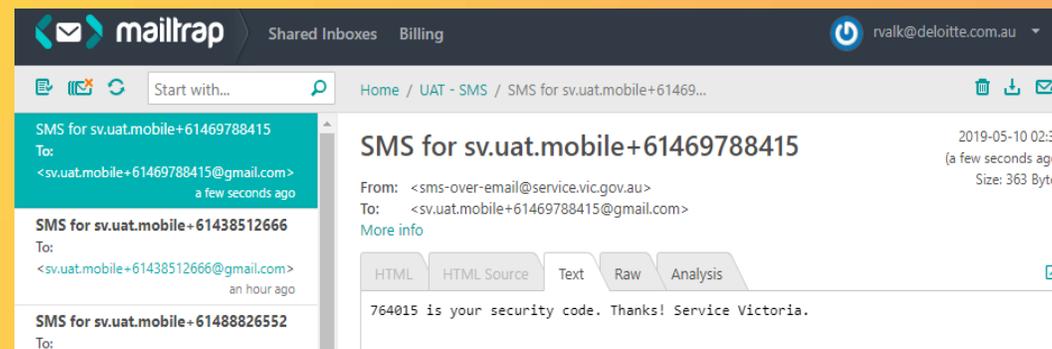
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3A. Once you've clicked continue, you will receive a security code via email or...



3B. ...mobile



# Registering as an installer

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## 4. Create a password and accept the terms and conditions

The screenshot shows a web browser window with the following content:

- Browser tabs:** Gmail - Free Storage, Create your Google A, Create your Google A, Log In | Service Victori
- Address bar:** Service Victoria (Department of Premier and | https://uat.account.service.vic.gov.au/Registratio... Incognito
- Page Title:** Create password
- Error Message:** A red-bordered box contains a warning icon and the text: "The following field contains an error:" followed by a bullet point: "• **Terms & conditions:** You must read and agree to the terms and conditions before you continue."
- Form Fields:**
  - "Enter new password" field: A text input with a red error border and a red asterisk icon.
  - "Re-enter new password" field: A text input with a green checkmark icon.
- Instructions:**
  - Below the first field: "Your password needs to be 8 characters or more, with 1 lower case letter and 1 upper case letter."
  - Below the second field: "You can't paste your password here."
- Terms and Conditions:** A checkbox is followed by the text: "I agree to Service Victoria's [terms and conditions](#) and [privacy and security policy](#)." Below this is a red error message: "You must read and agree to the terms and conditions before you continue."
- Buttons:** "Back" and "Next" buttons at the bottom right.

# Registering as an installer

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## 5. You will receive a confirmation of registration email

You've successfully registered as an industry participant in the Solar Homes program.

### **Before you do anything else**

Download the free Service Victoria app.

The app:

- lets you store and show a 'digital token' as proof of your participation
- confirms your accredited status to customers, retailers and regulators.

Without the app, you can't access this digital token.



Once you've downloaded the app, log in to your Service Victoria account to view or show the token.



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# 5. Confirming customer eligibility

# Confirming customer eligibility

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1. 9:41

**My cards** +

CLEAN ENERGY COUNCIL ACCREDITED INSTALLER A1234567

John Solar

Accred OC Type: Design & Install  
Accred SPS Type:  
Expiry Date: 27/08/2010  
Endorsement:

Eligibility Scanner

Eligibility Activity

2. 9:41

< Back

CLEAN ENERGY COUNCIL ACCREDITED INSTALLER A1234567

John Solar

Accred OC Type: Design & Install  
Accred SPS Type:  
Expiry Date: 27/08/2010  
Endorsement:

Licence Type:  
**3 Year Licence**

Start Date:  
22 Jun 2018

Given Name:  
John Solar

Date of Birth:  
12 Dec 1990

3. 9:41

Cancel

"Service Victoria" Would like to Access the Camera  
Required for scanning QR Codes to confirm eligibility for a Solar Homes installation.

Don't Allow OK

Eligibility Scanner  
Bring the QR Code into view and hold steady!

4. 9:41

Cancel

Eligibility Scanner  
Bring the QR Code into view and hold steady!

# Confirming customer eligibility

SVP



5. 9:41   

Cancel



**Eligibility Scanner**  
Bring the QR Code into view and hold steady!

6. 9:41   



  
**Verifying**

7. 9:41   



**Success**  
This installation has been assigned to you.

Name  
Jenni Dale

Email  
jenni@example.com

Address  
34 Oxford St, Collingwood VIC 3066

**Done**

8. 9:41   



**Invalid Assignment**  
This installation has already been assigned. If you believe this is incorrect, please contact Solar Victoria on [1300 SOLAR VIC.](tel:1300SOLARVIC)

**Close**



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# 6. Claiming payment for an installation

# Claiming payment for an installation

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## 1. Go to the 'payment' tab on the portal and select an installation

The screenshot shows the Solar Victoria portal interface. The navigation bar includes 'Home', 'Quotes', 'Installations', 'Payment', 'Manage Installers', and 'My Account'. The 'Payment' tab is selected. Below the navigation bar, there is a section for 'Installations' with a search bar and a table of 10 items. The table columns are SOLARVIC ID, QUOTE REFERENCE, LAST NAME, PROPERTY ADDRESS, and STATUS. The status of the installations varies from 'Installation completed' to 'Payment Processed'.

	SOLARVIC ID	QUOTE REFERENCE	LAST NAME	PROPERTY ADDRESS	STATUS
1	IN0000171	1234	SIT-TEST	1 McNab Ave FOOTSCRAY VIC 3011	Installation completed
2	IN0000142	UT0001	Tacay	1 McNab Ave FOOTSCRAY VIC 3011	Payment claim under review
3	IN0000145	SUDISD909098	Test	23 Kent St DROMANA VIC 3936	Payment claim under review
4	IN0000146	SIT testing	SITJohnston	17 Tranmere Ave CARNEGIE VIC 3163	Payment claim under review
5	IN0000147	HP001	Potter	3 22 Furzer St PRESTON VIC 3072	Payment claim under review
6	IN0000148	SE-12345	Stark	3 Geelong Rd TORQUAY VIC 3228	Payment claim under review
7	IN0000180	hagjld	t	2-8 Nicholson St ABBOTSFORD VIC 3067	Payment claim under review
8	IN0000141	1231JSF	Wanyne	26 Kent Rd BOX HILL VIC 3128	Payment approved
9	IN0000144	SOE-196901	Wasson	1 McNab Ave FOOTSCRAY VIC 3011	Payment approved
10	IN0000138	21313JKSS	Moore	U 2 33 Kent Rd SURREY HILLS VIC 3127	Payment Processed

# Claiming payment for an installation

SVP



## 2. Click 'request payment'

Solar Victoria navigation: Home, Quotes, Installations, Payment, Manage Installers, My Account

**Request Payment**

Installation IN0000171

**Customer**

First Name: SIT-TEST-BATTERY  
Last Name: SIT-TEST  
Positive Estimated Benefits:   
Email: grant.johnston@delwp.vic.gov.au

**Quote**

Quote Reference: 1234  
Quote Amount: \$10,000.00  
Quote Rebate Amount: \$2,225.00  
Quote Loan Amount: \$0.00  
Quote Entered Date: \_\_\_\_\_  
Quote Expiry Date: 4/09/2019

**Installation**

SolarVic ID: IN0000171  
Schedule Date: \_\_\_\_\_  
Submitted Date: \_\_\_\_\_

**Installers (0)**

**Products (1)**

AUTHORISE...	STATUS	REASON FOR ...	QUANTITY
Power Batter...	Approved		1

**Documentation (0)**

© solarvic 574.1 Status: Industry/Installation/Installation\_0000p00000y09E3A0

# Claiming payment for an installation

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3. Input the relevant details and confirm the installed product(s)

**Request Payment**

Review Installed Products | Upload Documents | Submit Installation

\*Electrical installation worker licence no. ?

11111

**Select Products** New Product

PRODUCT	QUANTITY	REASON FOR CHANGE
Power Battery 1	1	

Have any of the Installation Products changed?  Yes

Invoice Amount ? \$5,000.00

GST @ 10% \$454.55

STC Rebate Amount ? 2000

Loan Amount ? \$0.00

Rebate Amount ? \$1,500.00

Net Payable by Customer ? \$1,500.00

**Next**

# Claiming payment for an installation

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## 4. Upload the relevant supporting documents

The screenshot shows the Solar Victoria web interface. At the top, there is a navigation bar with links for Home, Quotes, Installations, Payment, Manage Installers, and My Account. Below this is a 'Request Payment' modal window. The modal has a progress bar with three steps: 'Request Payment' (selected), 'Upload Documents', and 'Submit Installation'. The 'Upload Documents' step is active, showing a list of required documents:

- Tax Invoice: Tax Invoice.pdf (upload icon)
- STC Assignment Form: STC Assignment Form.pdf (upload icon)
- Certificate of Electrical Safety: Certificate of Electrical Safety.pdf (upload icon)
- Quote: 006-call-center-2.png (upload icon)

There are two input fields for the Certificate of Electrical Safety document:

- \* Certificate of Electrical Safety Number:
- \* Responsible person REC reg./licence no.:  (This field has a red border and a message below it: "Does not match the required format")

At the bottom of the modal, there is a dropdown menu for 'Select Documentation Type' with 'Certificate of Electrical Safety' selected, and a '+ Additional Pages' button. 'Previous' and 'Next' buttons are also visible at the bottom right of the modal.

# Claiming payment for an installation

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## 5. Confirm installation details and submit

**Request Payment**

Progress: ✓ ✓ **Submit Installation**

**Installed Products**

PRODUCT	QUANTITY	REASON FOR CHANGE
Power Battery 1	1	

**Financial Information**

Net Benefit Realisation Amount: \$500.00  
Loan Amount: \$0.00  
Net Payable Amount Customer: \$0.00

**Uploaded Documents**

STC Assignment Form	STC Assignment Form.pdf
Certificate of Electrical Safety	Certificate of Electrical Safety.pdf
Tax Invoice	Tax Invoice.pdf

Previous **Submit**

# Claiming payment for an installation

SVP



6. Your payment claim for the installation will now appear as 'under review' until payment is approved

The screenshot shows the Solar Victoria web application interface. The navigation bar includes Home, Quotes, Installations (selected), Payment, Manage Installers, and My Account. The main content area displays a table of 10 installations. The table has columns for SolarVIC ID, Quote Reference, Last Name, Property Address, and Status. The status for most installations is 'Payment claim under review', while two are 'Payment approved' and one is 'Payment Processed'.

	SOLARVIC ID	QUOTE REFERENCE	LAST NAME	PROPERTY ADDRESS	STATUS
1	IN0000142	UT0001	Tacay	1 McNab Ave FOOTSCRAY VIC 3011	Payment claim under review
2	IN0000145	SUDISD909098	Test	23 Kent St DROMANA VIC 3936	Payment claim under review
3	IN0000146	SIT testing	SITJohnston	17 Tranmere Ave CARNEGIE VIC 3163	Payment claim under review
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6	IN0000171	1234	SIT-TEST	1 McNab Ave FOOTSCRAY VIC 3011	Payment claim under review
7	IN0000180	hagild	t	2-8 Nicholson St ABBOTSFORD VIC 3067	Payment claim under review
8	IN0000141	1231JSF	Wanyne	26 Kent Rd BOX HILL VIC 3128	Payment approved
9	IN0000144	SOE-196901	Wasson	1 McNab Ave FOOTSCRAY VIC 3011	Payment approved
10	IN0000138	21313JKSS	Moore	U 2 33 Kent Rd SURREY HILLS VIC 3127	Payment Processed