

# Solar Victoria Retailer Portal – User Guide

Exploring the dashboard

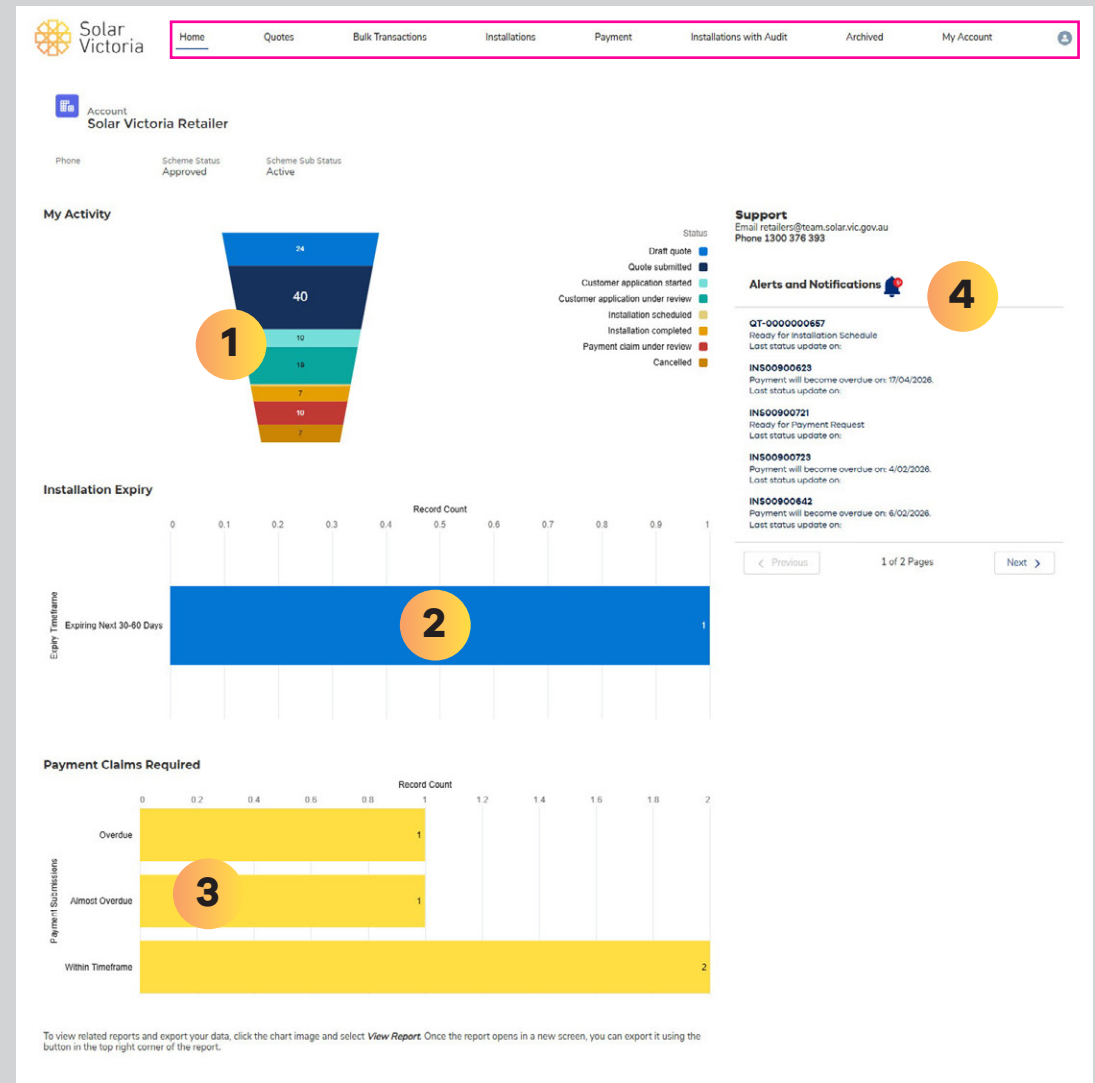
1.

Your **portal homepage** will appear when you log in.

Here you can view:

- 1 installations statuses
- 2 expiry timelines
- 3 payment claim timelines
- 4 alerts and notifications.

Quotes, Bulk Transactions, Installations, Payments, Installations with Audit and other information can be accessed through tabs at the top of the screen.



## 2.

Select sections on the 'Record Count' chart to view details of installations depending on their status.

**Solar Victoria** Account: Solar Retailer UAT

Phone: [Redacted] Scheme Status: Approved Scheme Sub Status: Active

**My Activity**

As of Today at 11:07 am

**Status Legend:**

- Draft quote
- Quote submitted
- Customer application started
- Customer application under review
- Customer application approved
- Installation completed
- Payment claim under review
- Additional information required
- Payment approved
- Payment rejected
- Cancelled

**Support:** Email: retailers@team.solarvic.gov.au Phone: 1300 376 393

**Alerts and Notifications:**

- INSO0763953** - Ready for installation Schedule. Last status update on: 12/5/2025, 2:53 pm.
- INSO0763951** - Ready for installation Schedule. Last status update on: 6/5/2025, 1:57 pm.
- INSO0763950** - Ready for installation Schedule. Last status update on: 6/5/2025, 11:45 am.
- INSO0763943** - [Redacted]

**Report: Installations**

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

Enable Field Editing | Search | Filter | Refresh | Export

Total Records	Total Total installed system cost (inc GST)	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

**Record Count: 11**

**Activity Legend:**

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

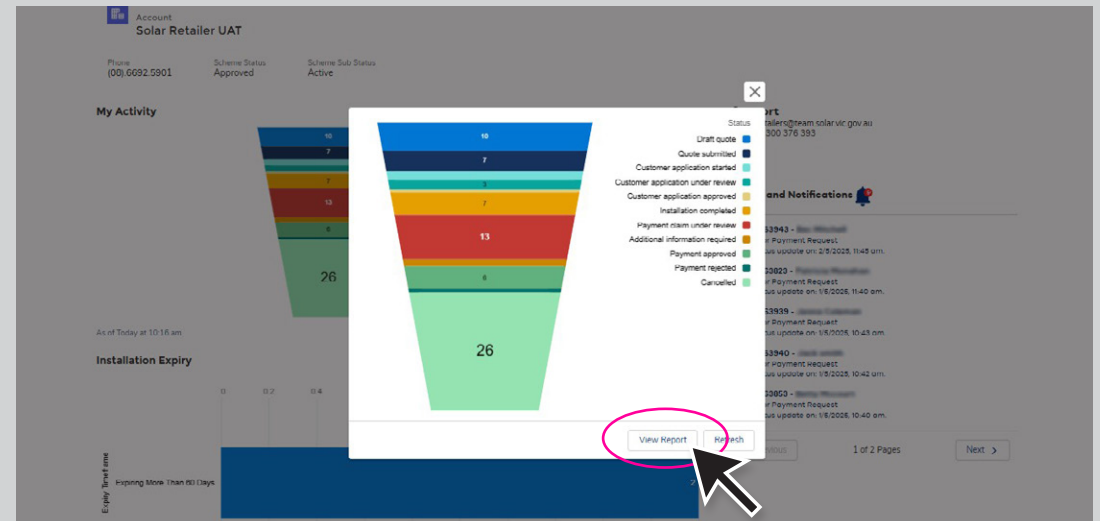
**Filters:** Show Me: All installations; Quote Expiry Date: All Time; Program Type: equals Standard Application

Status	Quote Reference	Installation: SolarVic ID	Property Address	Total installed system cost (inc GST)
Draft quote (10)	-	INSO0763835	-	-
	-	INSO0763858	-	-
	Q121212	INSO0763860	17 Highbury Street (121212) VIC 3185	-
	Ca123213	INSO0763865	25 Highbury Street (123213) VIC 3185	-
	-	INSO0763867	-	-
	-	INSO0763922	-	-
	-	INSO0763928	-	-
	-	INSO0763936	-	-
	-	INSO0763938	-	-
	-	INSO0763942	-	-
<b>Subtotal</b>				\$0.00
Quote submitted (7)	Q786	INSO0763675	4 Highbury Street (786) VIC 3185	\$20,000.00
	Ca123123	INSO0763834	17 Highbury Street (123123) VIC 3185	\$12,111.00
	Solar040612547887	INSO0763836	18 Highbury Street (12547887) VIC 3185	\$10,000.00

**Filters:** Show Me: All installations; Quote Expiry Date: All Time; Program Type: equals Standard Application

## 3.

Double click on the **'Record Count'** chart and select **'View Report'** to see details of all installations, including applicant details, system costs, deductions and recent status updates.



The screenshot shows the Solar Victoria Retailer Portal dashboard. At the top, there's a navigation bar with 'Solar Victoria' logo and links for Home, Quotes, Bulk Transactions, Installations, Payment, Installations with Audit, Archived, and More. Below this, there's a section for 'Installations' with a search bar and a table of 7 items. The table columns are: SolarVic ID, Quote Reference, Last... (Last Updated), Property Address, Applica... (Application Date), Quote... (Quote Date), Appli... (Application Date), Status, and Rebate Type.

SolarVic ID	Quote Reference	Last...	Property Address	Applica...	Quote...	Appli...	Status	Rebate Type
1	INS00763127	BAT1302	31 Middle Court (DUNEDIN VIC 3207)	16/12/2025	14/5/2025		Customer application under review	Battery
2	INS00763804	SolarQuote_0489013624	7 Highbridge Crescent (DUNEDIN VIC 3208)		16/6/2025		Customer application under review	Solar PV (Owner Occupier)
3	INS00763833	Q-12312	38 Neeson Road (DUNEDIN VIC 3208)		21/3/2025		Customer application started	Solar PV (Owner Occupier)
4	INS00763852	Solar040612b4f082	38 Neeson Road (DUNEDIN VIC 3208)	19/11/2025	19/6/2025	21/5/2025	Customer application approved	Solar PV (Owner Occupier)
5	INS00763854	Test041111111190	1 Middle Court (DUNEDIN VIC 3208)		22/6/2025		Customer application started	Solar PV (Landlord)
6	INS0076388b	H-12az	38 Neeson Road (DUNEDIN VIC 3208)		29/6/2025		Customer application under review	Hot Water (Owner Occupier)
7	INS00763910	Qa213	38 Neeson Road (DUNEDIN VIC 3208)		8/7/2025		Customer application started	Solar PV (Owner Occupier)

## 4.

Select an individual installation to view the installation's progress and details for the customer, quote, products and documentation required.

SolarVic ID	Quote Reference	Last...	Property Address	Applica...	Quote...	Appli...	Status	Rebate Type
1	INSO0763127	BAT1302	314 Middle Court (244805) (VIC 3017)	16/12/2025	14/5/2025		Customer application under review	Battery
2	INSO0763804	SolarQuote_0489013624	17 Highgate Crescent (244805) (VIC 3017)	16/6/2025			Customer application under review	Solar PV (Owner Occupier)
3	INSO0763804	Q-12312	314 Middle Court (244805) (VIC 3017)	21/3/2025			Customer application started	Solar PV (Owner Occupier)
4	INSO0763804	Solar040612b4r88z	314 Middle Court (244805) (VIC 3017)	19/11/2025	19/6/2025	21/5/2025	Customer application approved	Solar PV (Owner Occupier)
5	INSO0763854	Test0411111111190	1 Andler Court (244805) (VIC 3017)	22/6/2025			Customer application started	Solar PV (Landlord)
6	INSO076388b	H-12aZ	314 Middle Court (244805) (VIC 3017)	29/6/2025			Customer application under review	Hot Water (Owner Occupier)
7	INSO0763910	Qa213	314 Middle Court (244805) (VIC 3017)	8/7/2025			Customer application started	Solar PV (Owner Occupier)

**Installation INSO0759469**

Quote Reference: Batref | Application: Standard Application | Program Type: Standard Application | Status: Payment approved | Retailer Scheme Status: Retailer is approved | Last status update: 17/03/2025 9:37 am

Progress: 7 steps completed (Done)

**Customer**

First Name:

Last Name:

Email:

Quote Effective date: 17/12/2024

STL Error:

Additional Information:

**Quote**

Quote Reference: Batref | Excess Amount:

**Installers (0)**

**Products (2)**

Authorised Pro...	Quantity	Status	Reason for Cha...
Sigenergy Sig...	0	Approved	Product not com...
Alpha ESS Sm...	1	Approved	More suitable pr...

[View All](#)

**Documentation (3)**

Documentatio...	File Name	Created Date	View File
DOC3635347	Test-1099(2).pdf	17/12/2024 5:2...	<a href="#">View File</a>
DOC3635348	Test-1099(2).pdf	17/12/2024 5:2...	<a href="#">View File</a>

## 5.

Double click the **'Installation Expiry Timeframe'** at the bottom of the homepage to view expiry dates for all your installations.

The **filter icon** allows you to sort expiry dates of installations in different statuses. Filters will reset next time you log in.

The screenshot shows the Solar Victoria Retailer Portal homepage for 'Solar Retailer UAT'. The account status is 'Approved' and 'Active'. A funnel chart shows the distribution of installations by status: Draft quote (10), Quote submitted (7), Customer application started (7), Customer application under review (17), Customer application approved (8), Installation completed (26), Payment claim under review, Additional information required, Payment approved, Payment rejected, and Cancelled. A table of alerts and notifications is visible on the right. At the bottom, the 'Installation Expiry' bar shows a blue bar for 'Expiring More Than 60 Days' with a record count of 6. A mouse cursor is pointing at this bar.

The screenshot shows the 'Installation Expiry' report in the Solar Victoria Retailer Portal. The report title is 'Report: Installations Installation Expiry'. The x-axis is 'Record Count' (0 to 0.75) and the y-axis is 'Expiry Timeframe' (Expiring More Than 60 Days). A blue bar represents the data. A table below the chart shows the details of the installation:

Expiry Timeframe	Installation: SolarVic ID	Quote Reference	Last Name	Property Address	Application Approval Date	Applicat
Expiring More Than 60 Days (1)	INS00759503	LS-HW-00-1992	S	199-209 Collins Street MELBOURNE VIC 3000	18/03/2025	
Subtotal						
Total (1)						

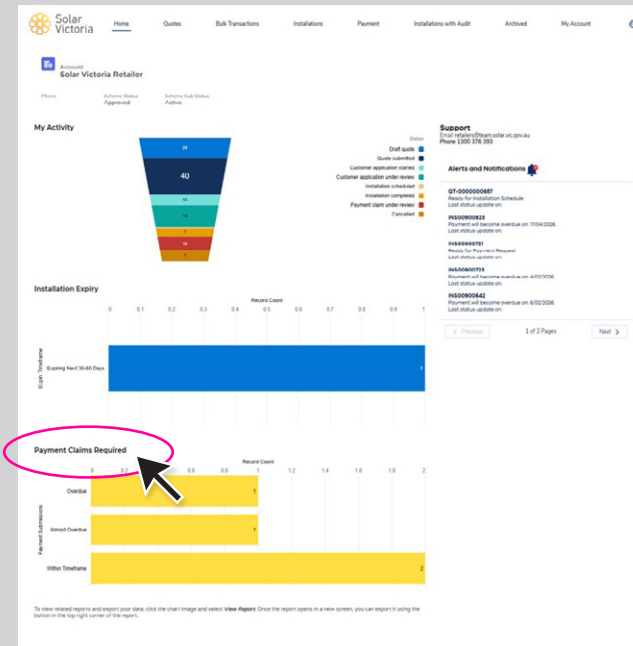
The table has columns for Row Counts, Detail Rows, Subtotals, and Grand Total, all of which are checked. A filter icon is circled in red in the top right corner of the report area.

## 6.

Click the '**Payment Claims Required**' chart at the bottom of the homepage to view Installations that are awaiting a payment submission.

Once the chart opens, you may select '**View Report**' to see a list of all Installations and relevant details.

You can also export this data using the export button at the top right of the report.



The screenshot shows the 'Payment Claims Required' report table. The table has columns for 'Payment Submissions', 'Installation: SolarVic ID', 'Rebate Type', 'Quote Reference', 'Applicant First Name', 'Applicant Last Name', 'Property Address', and 'Payment'. The data is as follows:

Payment Submissions	Installation: SolarVic ID	Rebate Type	Quote Reference	Applicant First Name	Applicant Last Name	Property Address	Payment
Overdue (2)	INS00900642	Solar PV (Owner Occupier)					
Almost Overdue (1)	INS00900723	Solar PV (Owner Occupier)					
Within Timetable (1)	INS00900223	Solar PV (Owner Occupier)					
	INS00900721	Solar PV (Landlord)					

The 'Export' button is highlighted with a red circle and an arrow. The table also includes a 'How Counts' section with options for 'Detail Rows', 'Subtotal', and 'Grand Total'.

## 7.

On the right-hand side of the screen, access **notifications and alerts** for installations including status updates and further actions required.

The screenshot displays the Solar Victoria Retailer Portal dashboard. The top navigation bar includes links for Home, Quotes, Bulk Transactions, Installations, Payment, Installations with Audit, Archived, and My Account. The user is logged in as 'Account Solar Retailer UAT' with a phone number, 'Scheme Status Approved', and 'Scheme Sub Status Active'.

The 'My Activity' section features a funnel chart showing the distribution of installation statuses. The chart is divided into segments with the following counts from top to bottom: 10 (Draft quote), 7 (Quote submitted), 7 (Customer application started), 17 (Customer application under review), 8 (Customer application approved), and 26 (Installation completed).

The 'Installation Expiry' section shows a horizontal bar chart with a 'Record Count' on the x-axis (0 to 5) and 'Expiry Timelines' on the y-axis. A single bar indicates 'Expiring More Than 60 Days' with a count of 5.

The 'Support' section provides contact information: 'Email retailers@team.solarvic.gov.au' and 'Phone 1300 376 393'.

The 'Alerts and Notifications' section is highlighted with a pink box and a black arrow. It lists several notifications with their respective status and last update times:

- INS00763953** - Ready for Installation Schedule. Last status update on: 12/5/2025, 2:53 pm.
- INS00763951** - Ready for Installation Schedule. Last status update on: 6/5/2025, 1:57 pm.
- INS00763950** - Ready for Installation Schedule. Last status update on: 6/5/2025, 11:45 am.
- INS00763943** - Ready for Payment Request. Last status update on: 2/5/2025, 11:45 am.
- INS00763823** - Ready for Payment Request. Last status update on: 1/5/2025, 11:40 am.

The bottom of the page shows navigation controls: '< Previous', '1 of 3 Pages', and 'Next'.

# Alerts and Notifications

8.

To filter notifications, select the 'My Account' tab.

Then select the checkboxes under 'Notification Settings' to sort by 'Scheduled installation notifications' and 'Payment request notifications'.

You will need to reset these filters to see all your notifications.

The screenshot shows the Solar Victoria Retailer Portal dashboard. The 'My Account' tab is highlighted in a pink circle. The dashboard includes a navigation menu, account details, a funnel chart for 'My Activity', a legend for notification statuses, and a list of alerts and notifications.

Status	Count
Draft quote	10
Quote submitted	7
Customer application started	7
Customer application under review	17
Customer application approved	8
Installation completed	26

Alerts and Notifications:

- INS00763953 - Ready for Installation Schedule. Last status update on: 12/5/2025, 2:53 pm.
- INS00763951 - Ready for Installation Schedule. Last status update on: 6/5/2025, 1:57 pm.
- INS00763950 - Ready for Installation Schedule. Last status update on: 6/5/2025, 11:45 am.
- INS00763943 - Ready for Payment Request. Last status update on: 2/5/2025, 11:45 am.
- INS00763823 - Ready for Payment Request. Last status update on: 1/5/2025, 11:40 am.

The screenshot shows the Solar Victoria Retailer Portal account details page. The 'Notification Settings' section is highlighted in a pink box, and the checkboxes for 'Schedule Installation Notifications' and 'Payment Request Notifications' are circled in pink. The page also shows account information, contact details, and sections for 'Contacts (4)', 'Files (0)', 'Notes (0)', and 'Installations (6+)'. An arrow points to the 'Notification Settings' section.

Account Name	Phone
Solar Retailer UAT	(08) 6692 5901

Contact Name	Title	Email	Phone
Solar Retailer			(08) 6692 5901

# Payment Claim Timelines – List View

## 9.

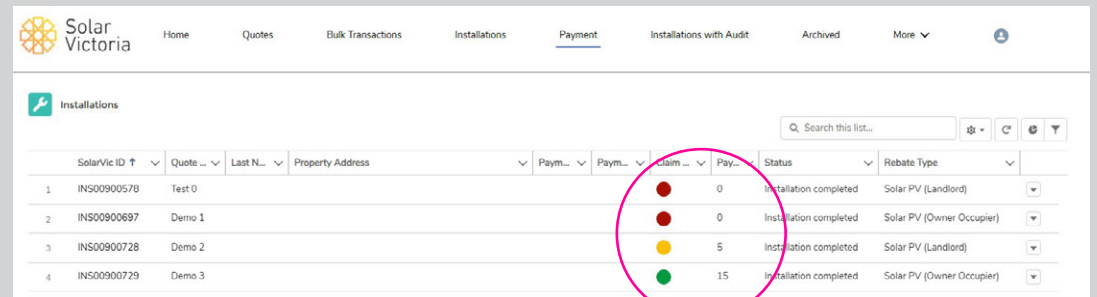
Click **'Payment'** from the top list of tabs to view the following:

### Claim Due Status

- Red icon– indicates installations that exceed the initial 60-day period, including any extensions provided, and requires immediate payment submission.
- Amber icon– indicates installations with 10 days or less remaining to submit a payment submission. You can still request a 14-day payment extension during this time.
- Green icon – indicates installations that have not yet reached the payment request submission deadline.

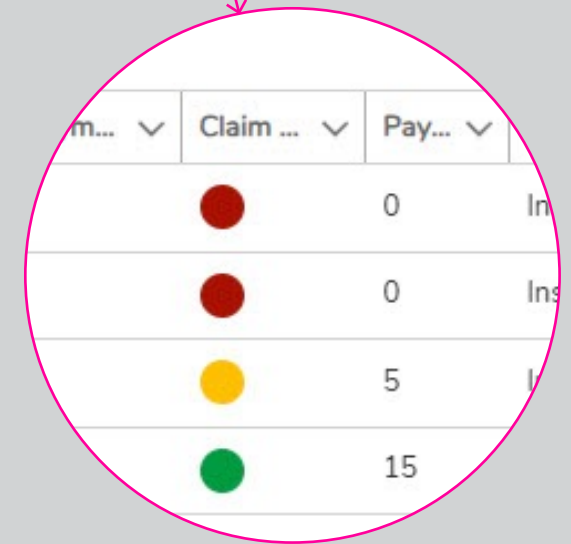
### Payment Submission Days Remaining

Displays remaining days before the payment claim deadline. All installations must submit payment requests within 60 days after the installation has occurred. 14-day extensions can only be requested while installations are green or amber.



The screenshot shows the 'Payment' tab in the Solar Victoria Retailer Portal. A table lists installations with columns for Solar/Vic ID, Quote, Last N., Property Address, Paym., Paym., Claim, Paym., Status, and Rebate Type. A red circle highlights the 'Claim' column, which contains colored icons and numbers representing days remaining.

Solar/Vic ID	Quote	Last N.	Property Address	Paym.	Paym.	Claim	Paym.	Status	Rebate Type
1	INS00900578	Test 0				0		Installation completed	Solar PV (Landlord)
2	INS00900697	Demo 1				0		Installation completed	Solar PV (Owner Occupier)
3	INS00900728	Demo 2				5		Installation completed	Solar PV (Landlord)
4	INS00900729	Demo 3				15		Installation completed	Solar PV (Owner Occupier)



A magnified view of the 'Claim' and 'Paym.' columns from the table above, showing the colored icons and numbers.

Claim	Paym.
0	0
0	0
5	5
15	15

## 10.

On the Installation page, click the **'Request Extension'** button to automatically add 14 days to the 60-day submission deadline.

You can only use this option once, and it can only be used when the Installation is within the initial 60-day period.

Once selected, a pop-up will open that allows you to select the reason for your request.

The payment submission deadline, and days remaining to submit payment information will be automatically updated.

Solar Victoria

Home Quotes Bulk Transactions Installations Payment Installations with Audit Archived More

Request Payment Request Extension

Installation INS00900729 Schedule Installation

Quote Reference Application 100574464 Program Type Standard Application Status Installation completed Retailer Scheme Status Retailer is approved Last Status Update

Application approved Payment - In Progress Done

### Request Payment Submission Extension

#### Payment Extension Request

\* Extension Request Reason

--None--

--None--

Delayed Obtaining CES

Delayed STC/VEEC Documentation

Issues Caused by DNSP Activation Delaying CES

Not Yet Installed

Additional Comments

Submit