

Training Manual For Solar Retailer

GREENBOT PLATFORM

VERSION 1.0



Greenbot
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GREENBOT

Getting Started with Greenbot

Welcome to Greenbot!

Greenbot is a free online trading platform for trading small-scale technology certificates (STCs). Greenbot can be accessed from any internet ready device. Greenbot is 100% cloud-based and all transactions happen in real time, ensuring that you have the most up-to-date financial information at your fingertips.

There is no additional cost or limit for the number of user and STCs that can be traded through Greenbot. Greenbot's intuitive design promotes efficiency and collaboration for the Solar Retailer and their contractors.

Because the system is in the cloud, there is nothing to download or install; all updates, security and maintenance automatically happen behind the scenes.

Quickstart Guide

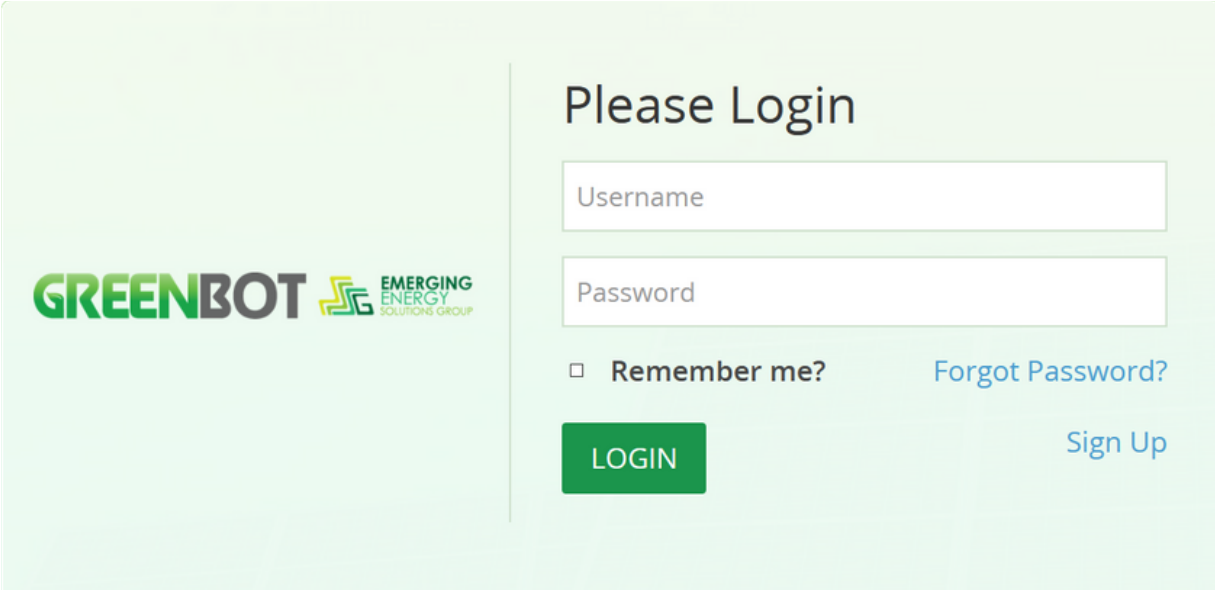
What you will need


- Access to internet
- An email address
- One of the following internet browsers
 - Google Chrome (PC and Mac) [recommended]
 - Mozilla Firefox (PC and Mac)
 - Microsoft Edge (PC)
 - Safari 8 (Mac)

Create an Greenbot Account

Solar Retailer

To sign up, go to <https://login.greenbot.com.au/emergingenergy>



GREENBOT  EMERGING ENERGY SOLUTIONS GROUP

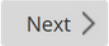
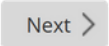

Please Login

Username

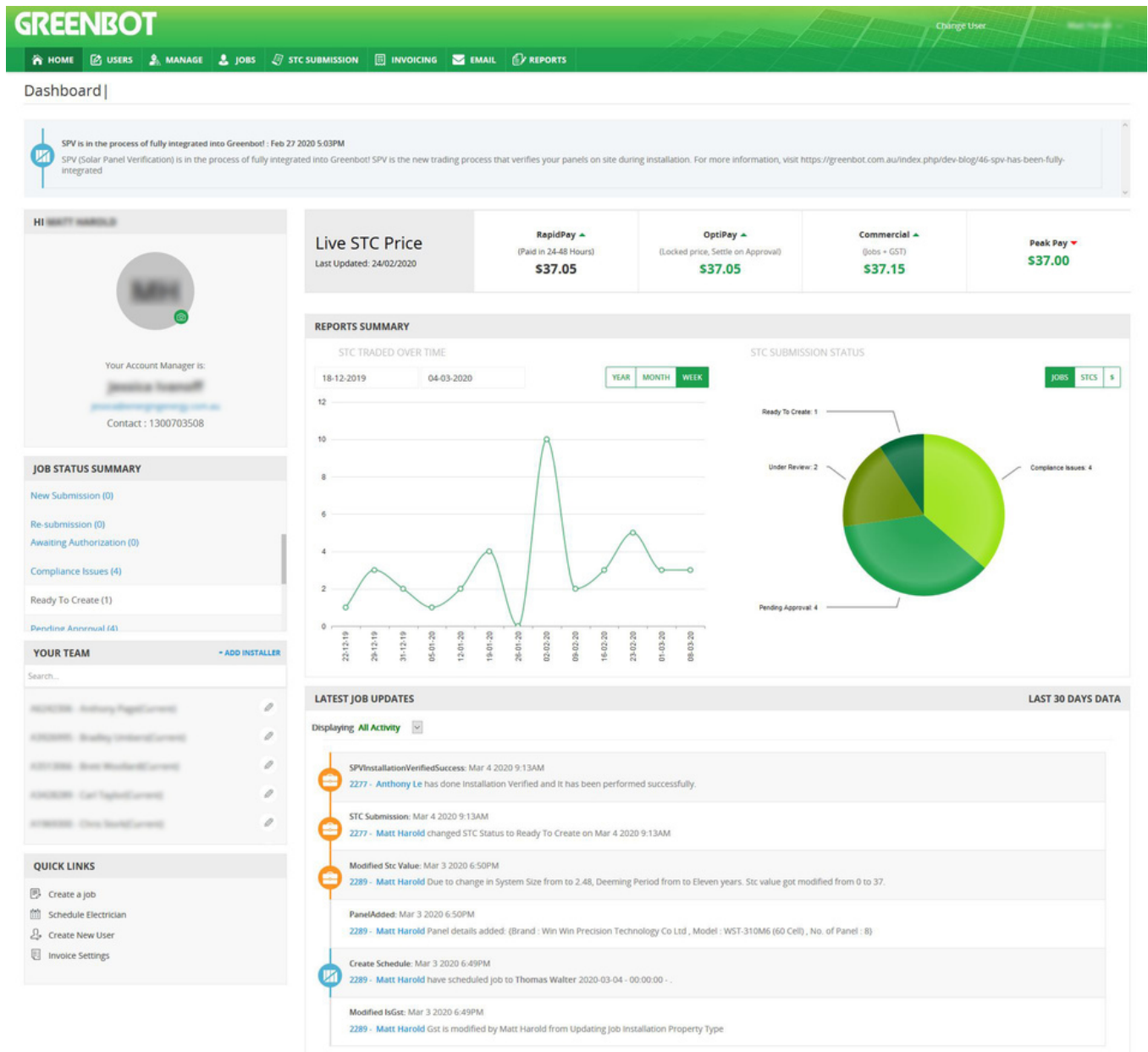
Password

☐ Remember me? [Forgot Password?](#)

LOGIN [Sign Up](#)

1. Click the Sign Up link
2. Enter your first name, last name, email address, your unique username and password
3. Click  Button
4. Enter your company ABN, name and company address details
5. Click  Button
6. Enter your account details and upload Identification Check documents
7. Click  Button

Once your account has been approved and you are logged in, the Greenbot dashboard will be the first page you will see. The dashboard will give you visibility not only to our live STCs pricing but also an overall activity summary for your Greenbot account.



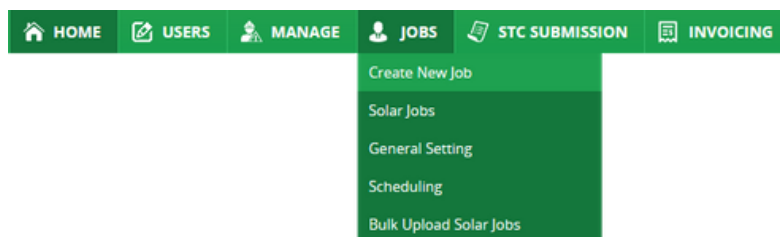
Create a Job

Solar Retailer

Navigate to Jobs

Hover your pointer to Jobs tab on the menu bar

Select create new job



Fill in your job details with *

Job Type:

PVD - Solar Panel System

SWH - Solar Water Heater

Reference Number:

Your internal job reference number to keep track of submissions

Job Stage:

Choose new installation, if it is an upcoming job and you plan on scheduling it to an installer to capture data onsite. If it is completed, you can select an installation date. (not mandatory)

Title:

Name of the homeowner. (not mandatory)

Installation Date:

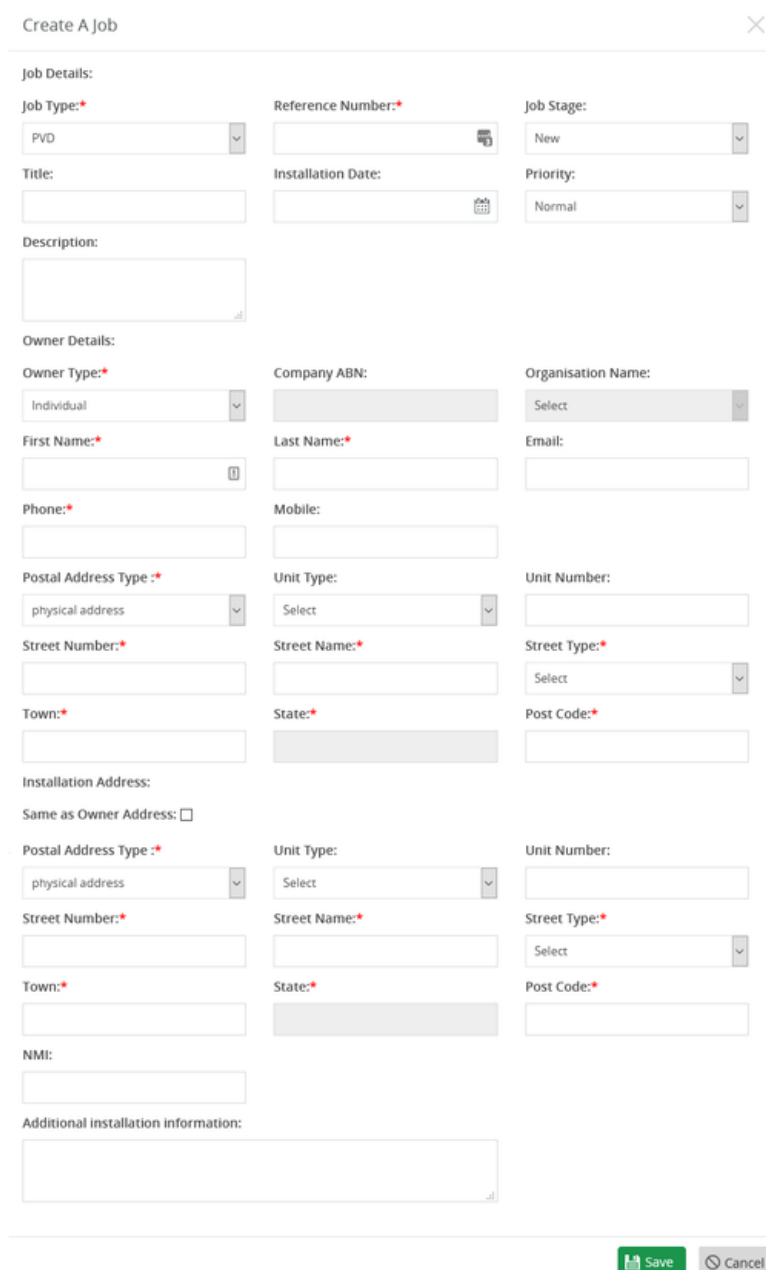
If it's completed, you can select an installation date.(can be amended later)

Priority:

High, Normal and low. (not mandatory)

Description:

Description of the system that will be installed. (not mandatory)



Create A Job

Job Details:

Job Type:* PVD Reference Number:* Installation Date: Job Stage: New Priority: Normal

Description:

Owner Details:

Owner Type:* Individual Company ABN: Organisation Name: Select

First Name:* Last Name:* Email:

Phone:* Mobile:

Postal Address Type:* physical address Unit Type: Select Unit Number:

Street Number:* Street Name:* Street Type: Select

Town:* State:* Post Code:

Installation Address:

Same as Owner Address: ☐

Postal Address Type:* physical address Unit Type: Select Unit Number:

Street Number:* Street Name:* Street Type: Select

Town:* State:* Post Code:

NMI:

Additional installation information:

Save Cancel

Click Save when you finish entering in all the details with a *

When your job is successfully created, you will be taken to the job screen where you can view all information about this particular job

HOME

USERS

MANAGE

JOB

STC SUBMISSION

INVOICING

EMAIL

REPORTS

GREENBOT

EMERGING

GREENBOT PORTAL

EESG123456PVD

John Jones, HOUSE 5 15 Power Street MELBOURNE VIC 3000

PV SOLAR

Job Details

Invoice

History

Message

Job Action

Assign to SCO: Select

Assign to STC: Select

Save job

Cancel

Print

Reference Number*

EESG123456PVD

Title:

Mr John Jones

Description:

22 x 300 watt Jinko

Job Number*

00-GP30-S00013

Job Stage:

New

Installation Date:

Sold By:

Priority:

Normal

NMI:

PHOTOS

Collapse All

Download All

Upload Photos

PDF

Delete

Reference Photos

Default Photos

STC Submission

PANEL SERIAL NUMBERS

You can enter multiple serial numbers in this field. Each serial number must appear on a new line and be less than 101 characters.

1

2

3

4

5

6

7

8

OWNER DETAILS

Owner Type: Individual

John Jones

HOUSE 5

15 Power Street

MELBOURNE VIC 3000

Email:

PH: 0400000000

IM:

INSTALLATION DETAILS

Same as owner address

HOUSE 5

15 Power Street

MELBOURNE VIC 3000

Distributor:

Electricity Provider:

Meter Number:

Phase Property:

Latitude:

Longitude:

OTHER DETAILS

Does the home owner have an existing system on the property?: No

Additional installation information:

CUSTOM DETAILS

SYSTEM DETAILS

System Size (kW):

STC Value:

Total Panels:

Brand

Model

#

Action

STC DETAILS

Installation property type:

Single or multi story:

Are you installing new, replacing or adding panels to a system?:

Type of connection to the electricity grid:

System mounting type:

For what period would you like to create REC:

Is there more than one SGI at this address?:

INSTALLER DETAILS

Find Installer

Installer:

Designer:

Electrician:

Signature:

Signature:

Signature:

SCHEDULE AN INSTALLER: JOHN JONES, HOUSE 5 15 POWER STREET MELBOURNE VIC 3000

Add a Visit

CES/COC FORM

There is no CES/COC form available, Create one now?

CONVERT CES PDF

CREATE

UPLOAD

STC FORM

There is no STC form available, Create one now?

CREATE

UPLOAD

DOCUMENT MANAGER

Download All

Add Document

STC STATUS: NOT YET SUBMITTED

You must fill out these required details before you are able to trade:

Installer details required

Designer details required

Electrician details required

STC value has not been calculated

The submission date must either be on or within 12 months of the date of installation

CES document is required to trade

STC document is required to trade

Please complete all fields under System Details section

Please complete all fields under STC Details section

Serial number photos are required

At least one installation photo is required

NMI is required

STC Value: 0.00

RapidPay

OpdPay

Commercial

Peak Pay

RETAILER DETAILS

Company Name: Greenbot Traders

Company ABN: 83614837124

Contact Name: GREENBOT PORTAL

Company Phone: 1300703008

Retailer: EMERGING ENERGY SOLUTIONS GROUP PTY LTD

Retailer ABN: 34152953412

Email: test@greenbot.com.au

Company Mobile:

Retailer Name: Emerging Energy


Job Page - System and STC Details

Solar Retailer

On the Job Page,

Go to System Details and the STC Details Section

Complete the form with the system information. This information will help the Greenbot calculate how many STC your system is eligible for.

SYSTEM DETAILS		STC DETAILS											
System Size (KW):	<input type="text"/>	Installation property type:	<input type="text" value="Select"/>										
STC Value:	<input type="text"/> 	Single or multi-story:	<input type="text" value="Select"/>										
Total Panels:		Are you installing new, replacing or adding panels to a system?:	<input type="text" value="Select"/>										
<div>+ Add Panel Brand + Add Inverter Brand + Add Battery Manufacturer</div>		Type of connection to the electricity grid:	<input type="text" value="Select"/>										
<table border="1"><thead><tr><th>Brand</th><th>Model</th><th>#</th><th>Action</th></tr></thead><tbody><tr><td> </td><td> </td><td> </td><td> </td></tr></tbody></table>		Brand	Model	#	Action					System mounting type:	<input type="text" value="Select"/>		
Brand	Model	#	Action										
<table border="1"><thead><tr><th>Brand</th><th>Series</th><th>Model</th><th>#</th><th>Action</th></tr></thead><tbody><tr><td> </td><td> </td><td> </td><td> </td><td> </td></tr></tbody></table>		Brand	Series	Model	#	Action						For what period would you like to create RECs:	<input type="text" value="Eleven years"/>
Brand	Series	Model	#	Action									
<table border="1"><thead><tr><th>Manufacturer</th><th>Model Number</th><th>Action</th></tr></thead><tbody><tr><td> </td><td> </td><td> </td></tr></tbody></table>		Manufacturer	Model Number	Action				Is there more than one SGU at this address?:	<input type="text" value="Select"/>				
Manufacturer	Model Number	Action											
Latitude	<input type="text"/>	Longitude	<input type="text"/>										

System Size (KW):

Your system power output.

STC Value:

Click the calculator icon to generate STC value.

Job Stage:

Add Solar Panel brand and model.

Add Inverter brand and model.

Add Battery brand and model. (not mandatory)

Latitude and Longitude:

If the installation is in a rural area, this functionality will enable our Compliance Team to locate the system easily.

STC Details:

Choose your answer accordingly from the drop-down list.

Job Page - Assigning Job to an Installer

Solar Retailer

On the Job Page,

You also can assign an Installer, Designer and Electrician to the installation.

There are 3 ways to assign a job to an installer.

1. You can find the installer by **clicking** + next to 'Find Installer'
 - a. **Type** in the Installer's CEC Accreditation Number
 - b. **Type** in their First Name
 - c. **Select** their System Electrician Role
 - d. **Click** Save
2. You can **select** the installer from drop-down list
 - a. If the name of installer is **green**, it means that the Installer's Greenbot account is already linked to your solar company and the scheduled job will appear on their Greenbot App.
 - b. If the name of the installer is gray, it means that the installer's Greenbot account haven't been linked to your solar company. To link this installer, please contact your Account Manager
3. You can add a visit by **clicking** the green + Add a Visit button
 - a. Fill in the job scheduling form to schedule a visit
 - b. On this section you can also choose your checklist template. Default-SE will be the default template.

INSTALLER DETAILS Find Installer + ? Help

Installer: [dropdown] [Find Installer] [Help] [Copy]

Signature: [icons] [Signature Field]

Designer: [dropdown] [Find Designer] [Help] [Copy]

Signature: [icons] [Signature Field]

Electrician: [dropdown] [Find Electrician] [Help] [Copy]

Signature: [icons] [Signature Field]

You have not scheduled an installer.
(Scheduling allows an electrician to view and capture job data.)
Is your installer not showing on the list? [INVITE THEM TO GREENBOT](#)
[Assign an Installer](#)

SCHEDULE AN INSTALLER : JOHN JONES, HOUSE 5 15 POWER STREET
MELBOURNE VIC 3000 [+ Add a Visit](#)

Editing or Creating Checklist

You should always be on default template, unless if you want to add something specific. Click save to log all of the changes.

You can access checklist:

1. If you haven't schedule a visit:
 - a. Go to the schedule an installer section and click Add a visit
 - b. Job schedule window will open and you can see the checklist Template on the bottom of the window. Default-SE is a default template.
2. If you already schedule a visit:
 - a. Go to schedule an installer section and click Actions then choose edit
 - b. Job Schedule screen will be opened, you can see your selected checklist and its content.
3. Click Save to keep all the changes.

SCHEDULE AN INSTALLER · HEPBURN SHIRE COUNCIL, HEPBURN SHIRE COUNCIL ANNA IMBERGER - PROGRAM LEADER, 34 GRENVILLE STREET DAYLESFORD VIC 3460

+

Add a visit

Job Schedule

Visit Start:*

From

Time

Visit End:

To

Time

Visit Label:

EESG123456PVD

Visit Detail:

22 x 300 kwk Jinko

Assign Staff:*

Select

Assign Job:*

EESG123456PVD

CheckList Template:

Default - SE

↑ ↓ ⌵ ⌶

Capture Back Panel Label (0/1)

↑ ↓ ⌵ ⌶

↑ ↓ ⌵ ⌶

Capture PV Serial Numbers (0/0)

↑ ↓ ⌵ ⌶

↑ ↓ ⌵ ⌶

Capture Installation Photos (0/1)

↑ ↓ ⌵ ⌶

↑ ↓ ⌵ ⌶

Capture Inverter(s) photo (0/1)

↑ ↓ ⌵ ⌶

↑ ↓ ⌵ ⌶

Capture Meterbox Photos (0/1)

↑ ↓ ⌵ ⌶

↑ ↓ ⌵ ⌶

Capture Switchboard Photos (0/1)

↑ ↓ ⌵ ⌶

↑ ↓ ⌵ ⌶

Capture Inverter(s) Model label (0/1)

↑ ↓ ⌵ ⌶

↑ ↓ ⌵ ⌶

Capture Signatures (0/4)

↑ ↓ ⌵ ⌶

↑ ↓ ⌵ ⌶

Capture Certificate of Electrical Safety (0/1)

↑ ↓ ⌵ ⌶

+ Add New Item

Save as New Template

Cancel

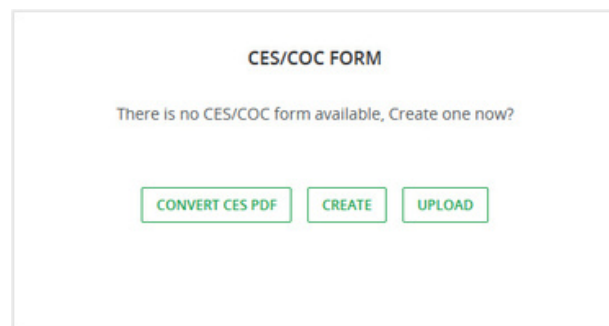
Save

CES/COC Form

Solar Retailer

There are dedicated section for Certificate Electrical Safety (CES) and Certificate of Compliance (COC) on Greenbot.

There are 3 ways to submit your CES/COC form to the system.



Convert CES PDF

If your company already have CES Form in non editable PDF file, Convert CES PDF button will give you the ability to convert your pdf file into the editable form where you can ask your installer to fill in within the Greenbot App.

Create CES/COC Form

If you don't have CES Form for your company, Greenbot will give you the ability to create one. To create CEC/COC Form is simply by clicking Create button.

The system now will prompt you to create the form from the new document template or the existing one.

Please choose existing one, unless your company have a specific information to ask.

Upload CES/COC Form

If you already completed a hand written CEC/COC form, Greenbot gives you the flexibility to upload those form of yours.

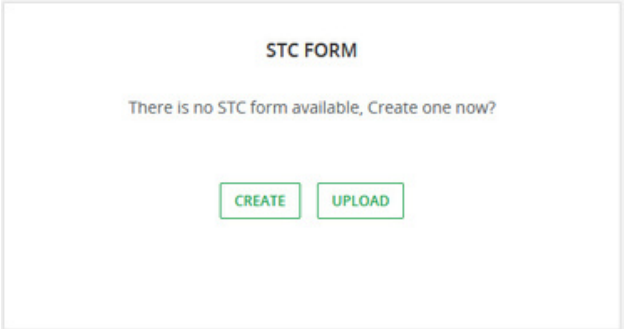
STC Form

Solar Retailer

STC form is located next to CES/COC form.

There are 2 way to submit your STC form:

1. Create: if you don't have one yet, the system will allow you to create your STC Form
2. Upload: if you already complete STC Form, you can upload that document by clicking Upload Button



The screenshot shows a web interface for the STC FORM. At the top, it says "STC FORM". Below that, a message states "There is no STC form available, Create one now?". At the bottom, there are two buttons: "CREATE" and "UPLOAD".

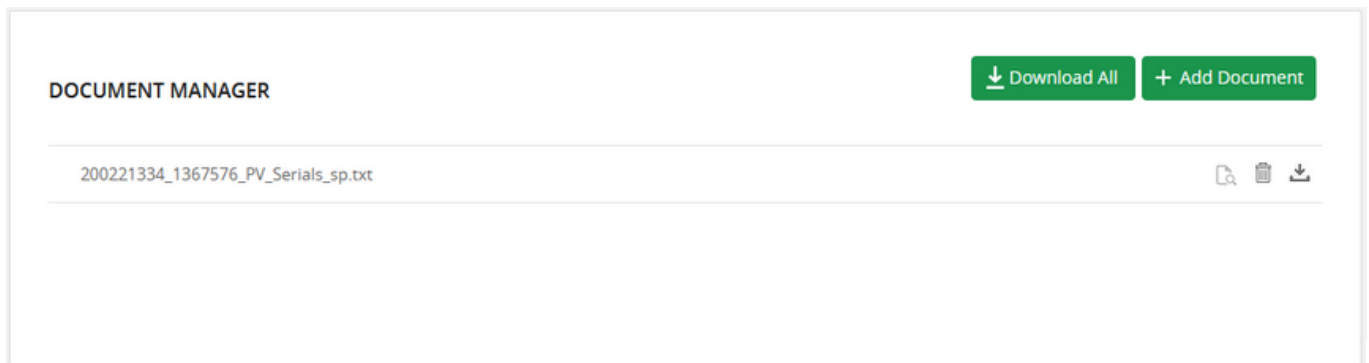
Create CES/COC Form

If you don't have STC Form for your company, Greenbot will give you the ability to create one. To create STC Form is simply by clicking Create button.

Please choose your new STC Document by checked the check box.

Upload CES/COC Form

If you already completed a hand written STC form, Greenbot gives you the flexibility to upload those form of yours.



All the needed document that you need, you can uploaded here. If you already have multiple document uploaded already and you would like to download all of them, The Download All button will compress all the document into zip file for you for your convinience.

Add Document

Next to the Download All button, there is a button that will allowing you to add document to the system for this particular job.

Delete Document

In every item in the list, you can see the bin icon. Click that icon to delete specific document.

Download Single Document

Next to the delete icon, you will see an icon to download a single document.

STC STATUS: NOT YET SUBMITTED

You must fill out these required details before you are able to trade:

- Please check warning notice of serial number.
- The number of serial numbers provided does not match the total panel amount for this job.

Capture Back Panel Label (1/1)	✓
Capture PV Serial Numbers (21/20)	✓
Capture Installation Photos (1/1)	✓
Capture Inverter(s) photo (1/1)	✓
Capture Meterbox Photos (1/1)	✓
Capture Switchboard Photos (1/1)	✓
Capture inverter(s) Model label (1/1)	✓
Capture Signatures (4/4)	✓
Capture Certificate of Electrical Safety (1/1)	✓

STC Value: 97.00

RapidPay	OptiPay	Commercial	Peak Pay
(Paid in 24-48 Hours)	(Locked price, Settle on Approval)	(Jobs + GST)	
\$38.25	\$37.50	\$38.25	\$37.00

TRADE STCs

By trading on the Geenbot Portal, you agree to the following [terms and conditions](#)

This section is where you can monitor your STC trading progress. Next to it you can see our best daily rate for STC.

Choose your trading term preference for your STC to be paid.

Before you trade your STC, please make sure that you already submitted all necessary information for this trading. The information that you enter will help our compliance team to speed up the process.

RETAILER DETAILS

Company Name : GREENBOT PTY. LTD.

Company ABN : 564667134

Email : info@greenbot.com.au

Contact Name : Mr. David Green

Company Phone : 08 9478 1234

Company Mobile : 08 9478 1234

Reseller : Greenbot Pty Ltd

Reseller ABN : 564667134

Reseller Name : Mr. David Green

Retailer Details can be found on the bottom of the page.

All Users

Send Mail

Create New User

Name:

Developer

Company ABN:

UserName:

Is Active:

☒

Email:

Role:

Select

Search

Reset

0 of 0 User(s) found

<input type="checkbox"/>	Name ▾	UserName ▾	Active	Email ▾	Last Login ▾	Action
No Record(s) Found.						

Page Size:

10 ▾

For your solar retailer STCs trading operation, You have the ability to add user, search, edit or delete your user details

New user

If you have a new personel to your team, click **Create New User** for adding them as new user to the system.

Search User

You can search a user by filling in their name, username, email and their role.

Edit and Delete User

In order to do this task for a user, you need to perform a search for the user and once you find the user then you can see the pencil icon for edit and trash bin icon for delete.

STC Submission Page

Solar Retailer

STC Submission

Reference Number/Job ID Number:

Owner Name:

Installation Address:

Submission Date Range:

From

To

Settlement Date Range:

From

To

Settlement Term :

Select

Is SPV Required:

All

Installation Verified:

All

☒ Not Yet Invoiced

☒ Has Been Invoiced

Search

Reset

10 of 111 job(s) found

<div> <div>Filters:</div> <div> <div>Show All 111</div> <div>New Submission 0</div> <div>Re-submission 1</div> <div>Under Review 0</div> <div>Requires Call Back 0</div> <div>Awaiting Authorization 0</div> <div>Compliance Issues 0</div> <div>Ready To Create 0</div> <div>Pending Approval 2</div> <div>CER Approved 108</div> <div>CER Failed 0</div> </div> <div>Cannot re-create 0</div> </div>														
<input type="checkbox"/>	Is SPV	IV	REF No - Company Name - Owner Name	Installation Address	STC Status	Solar Company	STC	Price (\$)	Trade Term	Submit Date	Settle Date	Auditor	Invoiced?	Action
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<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	20000 - Sunway - Sunway	20000 - Sunway - Sunway	<input checked="" type="checkbox"/>	20000 - Sunway - Sunway	200	200.00	Report Pay	20000-0000	20000-0000	20000-0000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

No Of Jobs Selected : 0

Total STC Selected : 0

Total \$ Selected : 0

Export.csv - All Download

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Terms and conditions

This page is created for you to track your job status before the job is ready to be traded. As you can see from the picture above, you can see all the details about the job such as Job Installation Address, STC Status, REC Code, STC Price, Trading Term Submission date, Settlement Date, Auditor name and etc.