



TABLE OF CONTENTS

1.	Creating a job on Greenbot	3
2.	Adding installers	8
3.	Checking the status of traded jobs	10
4.	Create company staff/retailer representative account	11

CREATING A JOB ON GREENBOT

Step 1: Open jobs and then select 'Create New Job'

GREENBOT								
	🏠 номе	🖉 USERS	🍰 MANA	GE		JOBS	STC SUBMISSIC	DN
Dashboard						Create New Job		
Dashboard						Solar Jobs		
DATABASE						General Setting		
						Scheduling		
ACCREDITED PV MODULE LIST Last Updated: 21/02/2022						Bulk Upload Solar Jobs		

Fill in the job details

Note:

Job Type – PVD is for solar jobs

Job type – SWH is for solar hot water jobs

Create A Job		
Job Details:		
Job Type:*	Reference Number:*	Job Stage:
PVD 🗸		New 🗸
Title:	Installation Date:	Priority:
	(int) 	Normal 🗸
Description:		
Ourper Details	8	
Owner Details:		
Owner Type:*	Company ABN:	Organisation Name:
Individual 🗸		Select 🗸
First Name:*	Last Name:*	Email:
Phone:*	Mobile:	
Postal Address Type :*	Unit Type:	Unit Number:
physical address	Select 🗸	
Street Number:*	Street Name:*	Street Type:*
		select 🗸
Town:*	State:*	Post Code:*

Once the details are filled in, save the job.

Installer: Ø Greenbot Electrician(Current) ▼ Ø iii Designer: Signature : □ □ □ Signature : □ □ Signature :	: Ø Greenbot Electrician(Current) - ♥	Electrician: Greenbot Electrician →+ Signature: □ ⊕ ⊕ ☆
SCHEDULE AN INSTALLER : IVAN TEST2, 1 TEST STREET MELBOURNE VIC 3000 Visit ID : 211013169 Electrician : Greenbot Electrician	Visit Status : Open	Expand View Z Default Submission Actions -

Step 2: Enter in the Installer, Designer and Electrician

When you select the Installer, you'll receive the below prompt. Press OK to schedule visit.



At this point, the installer will be able to access the job on their app.



If the button above lights up green, the installer has an approved account. If it is grey, the installer needs to create a Greenbot account.

Step 3: Enter in the System Details (Inverter, Panels, System size etc) and STC Details

SYSTEM DETAILS					STC DETAILS		
System Size (KW) :					Installation property type:	Select	~
STC Value : 0					Single or multi-story:	Select	~
Total Panels : + Add Panel Brand +	+ Add Inverter Brand + Add Ba	attery Manufacturer			Are you installing new, replacing, extending or adding panels to a system?:	Select	~
					Type of connection to the electricity grid:	Select	~
Brand	Model		#	Action	System mounting type:	Select	~
Brand	Serles	Model	#	Action	For what period would you like to create RECs:	Nine years	~
Manufacturer		Model Num	ber	Action	Are you creating certificates for a system that has previously been failed by the Clean	Select	~
Additional Information:					Energy Regulator?:	Colort	
Latitude		Longitude					

Tip: Ensure the Owner's signature has been captured by the installer. If it hasn't, click the highlighted icon below to send the owner a text or email requesting a signature.

OWNER DETAILS

Owner Type : Individual								
Ivan Test2 1 Test Street MELBOURNE VIC 3000								
Email : PH : 0400000000 M : 040000000								
la 🤉 🖻								

Tip: Ensure the Panel Serial Numbers have been filled in after the installer has finished scanning the serial numbers on the app. This should populate automatically if the Installer uses the Greenbot app.

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	00000	*
2	11111	
3	22222	
4	33333	
5	44444	
6	55555	
7	66666	
8	77777	-
_		

Step 4: Sign the Written Statements Declarations

WRITTEN STATEMENTS DECLARATIONS	2		₹ Auto Sign Setting
Retailer Representative:	Developers API		
Position Held:	Solar Company Admin		
Installer, A1234567 Greenbot Electrician is	a SubContractor and have not changed the system design		
By Signing this Written Statement I declare the st	atements provided in the documents is true and correct	Signed By : Date : Retailer Name : GREENBOT PTY. LTD.	

Step 5: Upload the CES/COC/CCEW form and create the STC Form

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

Step 6: If the job is over 60kW, upload the 1) Panel supplier invoice and 2) Property electricity bill in Document Manager

DOCUMENT MANAGER	<u> ↓</u> Download Job Pack	<u>↓</u> Download All	+ Add Document

Step 7: Once the above is done, check the STC Status to see what still needs to be completed

STC STATUS: NOT YET SUBMITTED

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

- STC value has not been calculated.
- Please check warning notice of serial number.
- The submission date must either be on or within 12 months of the date of in
- stallation.
- 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.

Step 8: Once everything is done successfully, a green 'TRADE STCs' button will appear under our prices. Press the button to trade the job.



ADDING INSTALLERS

Step 1: Open Users and select 'Requested Solar Electricians'



Step 2: On the top right hand side, press 'Send Request'

GINGENBOT JG	EMERGING				Change User	
A HOME 🔄 USERS 🤰 MANAGE 🛓 JOBS 🔮	3 STC SUBMISSION	NOICING 🔤 EMAIL 🕑 REPORTS				
Requested Solar Electricians/SWH Us	sers					Send Request
Use the "send request" button on the right to add an installer to Bectricians who are displayed as "Request Accepted" Status wi To sign-up an electrician use this link: https://login.greenbot.co	o your scheduling team. Only el Il be able to be selected from th m.au/Account/GreenbotSignUp	ectricians who are registered and approved Greenbot users will be estaff dropdown in "Add Visit" single job view.	e able to be actied. Chice a request has been sent, electricians must accept the request via	the Greenbot installers APP to complete the connection.		
User Job Type:		Name	CEC Accreditation Number:	Status:		
Solar Blectricians	*			Select		Ŷ
Q, Search O Reset						
1 of 1 Solar Electriciant(s) found						
Name #		CEC Accreditation Number #		Status Ø		Action
Greenoot Bectrician		A1234567		Request Accepted		D. 8
man mar ha col						

Step 3: Enter in Details and press 'Save'

Send Request By Solar Company			≰ Back
Send Request Details			
First Name:*	Last Name.*	CEC Accreditation Number:	SWH License Number:
Email:			
SE Role:*			
■ Design Install Design & Install			
			M Save 🛇 Cancel

Step 4: You'll be able to add the Installer to jobs

	~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~	ш н н . :
Manufactur Iogin.greenbot.com.au says Additional Ir Installer has been added successfully.Do you want to schedule visit? OK Cancel	Action He Eyror Locaring Construction in a System Select that has previously been failed by the Clean Energy Regulator?: Is there more than one SGU at this address?: Select	· ·
Latitude INSTALLER DETAILS Find Installer + Installer/Detainer har base removed		(2) Неір
Installer: greenb Signature: Signature:	Greenbot Electrician(Current) ← ● ² ² ² ² ² ² Electrician:	· (+)
You have not scheduled an installer. (Scheduling alows an electrician to view and capture joo data.) Is your installer not snowing on the list? INVITE THEM TO GREENBOT	Assign an Installer	

CHECKING THE STATUS OF TRADED JOBS

Step 1: Open STC Submission and select 'STC Submission'

🏠 номе	🛃 USERS	🐊 MANAGE	💄 joi	BS	STC SUBMISSION	IVOIC	ING	🖂 EMAIL	PREPORTS	SPV LOG
TC Sub	mission				STC Submission					
ne sub	111551011				REC Creation Status					

Step 2: Press the 'Show All' tab on the far right. You'll be able to see the status of all traded jobs

1 of 1 job	t) found																
Filt	NS: New Subr	mission (0)	Re-submission (0) Under Review (0) Requires Call Back (0)	Analting Authorization (D) Cor	mpliance Issues (0) R	eady To Create (0) Pending A	oproval (0) CER.Approved (0) CE	R Failed (0) Cannot re-creat	urgent Revi	ew (0) Se	ow 41 (1)						
	IS SPV	IV	REF No - Company Name - Owner Name #	Installation Address Φ	STC Status #	REC BulkUpload Id ®	REC Id Creation Time ®	Solar Company #	Rec Code ®	STC ©	Price (\$) ©	Trade Term ®	Submit Date ®	Settle Date 9	Auditor ©	Invoiced?	Action
	No	Not Yet Verified	Job1 - John Jones	1112 Filnders Lane. MELBOURNE VIC 3000	Cannot re-create			GREENBOT PTY. LTD.		NeN	\$35.30	24 Hour	06/07/2018	09/07/2018 Ø	Claudia Tran	R	10
																	1

CREATE COMPANY STAFF/RETAILER REPRESENTATIVE ACCOUNT

Step 1: Open the Users dropdown box and select 'Create New User'

(REE	NBO	Т					
	🏠 номе	🖄 USERS	🐊 MANAGE	💄 Jobs	🖉 ѕтс	SUBMISSION		G
	Dashboa	Create New User						
	Dashbod	All Users						
	DATABASE	Solar Compan	ies			REPORTS		
		Solar Electricia	ins			KEI OKIS		
	ACCREDITE Last Updated	User Roles				Displaying Re	seller 5 Selecte	ed
	ACCREDITE	Requested Sol	ar Electricians					
	Last Updated	d: 22/03/2022		-		26 -		
	L CODEDITE		- D L LOT			24 -		

Step 2: Fill in details and press 'Save'

Create New Us	er			< Back
User Type: Company Staff	~	Role:* Default SCO		
Personal Details	staller & Designer			
First Name:*		Last Name:*	Email:*	Phone:*
User Name:*		Password:*	Is Active	
				🗎 Save 🚫 Cancel

Step 3: You will be able to change the user using the pencil icon under the 'Written Statements Declarations' on jobs

Iler Representative: Developer's API Developer's API Solar Company Admin Developer's API Solar Company Admin Uller, A1234567 Greenbot Electrician is a SubContractor and have not changed the system design Iller, A1234567 Greenbot Electrician is a SubContractor and have not changed the system design gning this Written Statement I declare the statements provided in the documents is true and correct Signed By: Date : Date : Date : Retailer Name : GREENBOT PTY, LTD. Retailer Name : GREENBOT PTY, LTD.	RITTEN STATEMENTS DECLARATIONS			
n Held: Solar Company Admin er, A1234567 Greenbot Electrician is a SubContractor and have not changed the system design ing this Written Statement I declare the statements provided in the documents is true and correct Bate : CkTO Sign 2c, Set Data From AutoSign Change : Retailer Name : GREENBOT PTY, LTD.	er Representative:	Developers API		
er, A1234567 Greenbot Electrician is a SubContractor and have not changed the system design ing this Written Statement I declare the statements provided in the documents is true and correct Date : Exto Sign dg - Set Data From AutoSign Retailer Name : GREENBOT PTY, LTD.	n Held:	Solar Company Admin		
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To Sign de Ste Data From AutoSign Retailer Name : GREENBOT PTY. LTD.	this Written Statement I declare the st	atements provided in the documents is true and correct	Signed By : Date :	
	- Click To Sign $\int \underline{\partial_{\mathcal{S}}}$ Set Data From AutoSign	1	Retailer Name : GREENBOT PTY. LTD.	