

Electrical Partners Portal Updating MyProfile



NETWORK

User Guide – April 2021



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MyProfile Features

The MyProfile area of the Electrical Partners Portal allows you to update your details such as:

- **Registration Details** - update your username, password, email address, phone number
- **CEC Details** - solar installers can add multiple or new CEC Accreditation Numbers
- **EWR Notifications** - select what status updates you receive by email or SMS
- **MyGroups (or businesses)** - Group Managers can manage Group Members and update business details. Group Members can update which groups they've joined.

IMPORTANT

If you haven't yet registered for the Electrical Partners Portal, please follow the instructions in our [How to Register User Guide](#).

When you login to the Electrical Partners Portal, you will first see your MyHome screen. Click on **MyProfile** in the top menu to get started.

MyHome **MyProfile** MyEWR MyCONNECT MyCLAIM Links Support

New Alerts
You currently have no new alerts. [View All](#)

EWR
Know what you need? → [EWR Power User Links](#) [EWR Quick Links](#)

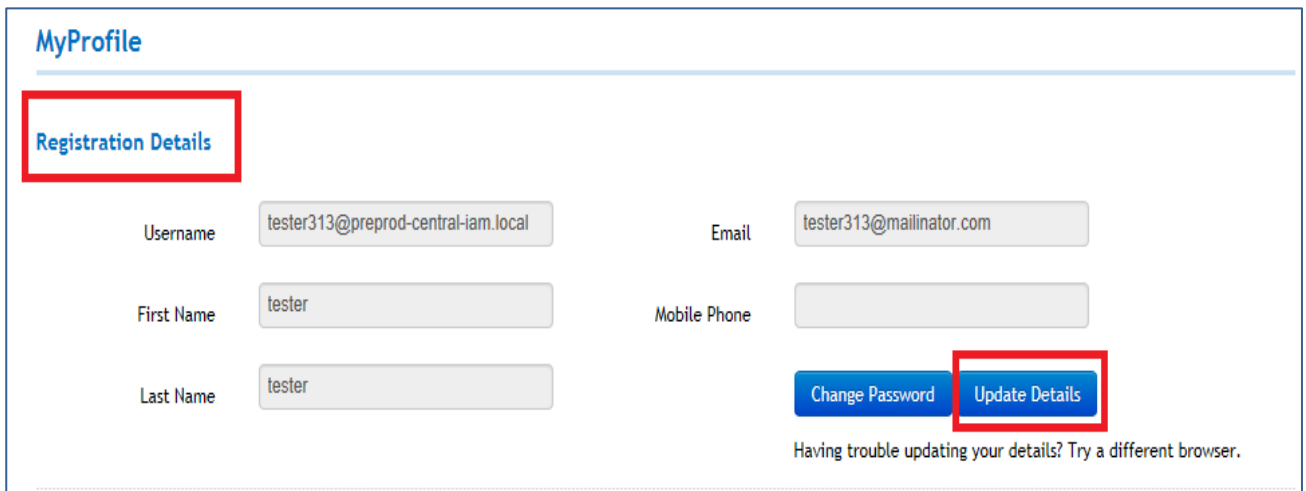
- New Permanent Supply Solar Install <30Kw
- New Temporary Builder's Supply Add Meter (H/W or Control Load)
- Form 3 Faults Rectified

Form 3 (Incomplete)	5	Open	299	Awaiting Retailer Requests	98
Saved	22	Open > 30 Days	208	Form 3 (Complete) < 60 Days	0

[View Recent](#) [View All](#)

Update Registration Details

1. In the **Registration Details** area on your MyProfile screen, to change any of the information click **Update Details**.



MyProfile

Registration Details

Username: tester313@preprod-central-iam.local Email: tester313@mailinator.com

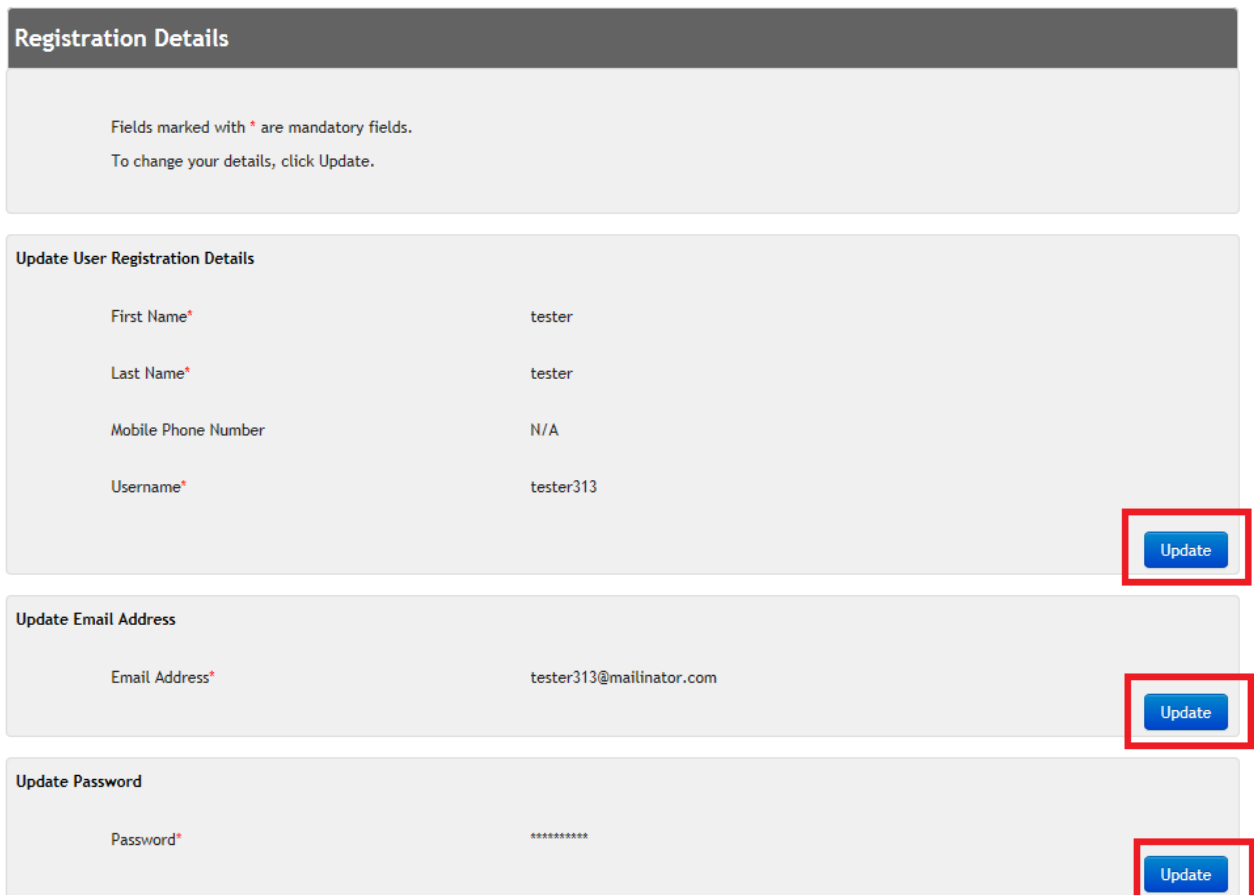
First Name: tester Mobile Phone: [Empty]

Last Name: tester

[Change Password](#) [Update Details](#)

[Having trouble updating your details? Try a different browser.](#)

2. Your **Registration Details** screen will display. To change any information, click **Update** in the relevant section.



Registration Details

Fields marked with * are mandatory fields.
To change your details, click Update.

Update User Registration Details

First Name*	tester
Last Name*	tester
Mobile Phone Number	N/A
Username*	tester313

[Update](#)

Update Email Address

Email Address*	tester313@mailinator.com
----------------	--------------------------

[Update](#)

Update Password

Password*	*****
-----------	-------

[Update](#)

[BACK TO MY PROFILE](#)

Update your User Registration Details

3. Click **Update** in the **Update User Registration Details** section.

Update User Registration Details

First Name*	tester
Last Name*	tester
Mobile Phone Number	N/A
Username*	tester313

[Update](#)

4. Update your First Name, Last Name, Mobile Number or Username as required. If you update your **Username**, click **Check Availability** to see if it's available in the Portal. Usernames are not case sensitive. Once done, click **Submit**.

Update User Registration Details

Fields marked with * are mandatory fields.

To change your details, update the appropriate fields below and click Submit

First Name*	<input type="text" value="tester"/>
Last Name*	<input type="text" value="tester"/>
Mobile Phone Number	<input type="text" value="N/A"/>
Username*	<input type="text" value="tester313"/> ? Check Availability ✓

[Cancel](#) [Submit](#)

Your Username must not be the same as anyone else registered in the Portal. If you receive an error message, choose another Username and check again.

5. Once you click Submit, you will see that your updates have been made. Click **Confirm**.

Confirm Registration Details

Check the below details are correct and click Confirm.

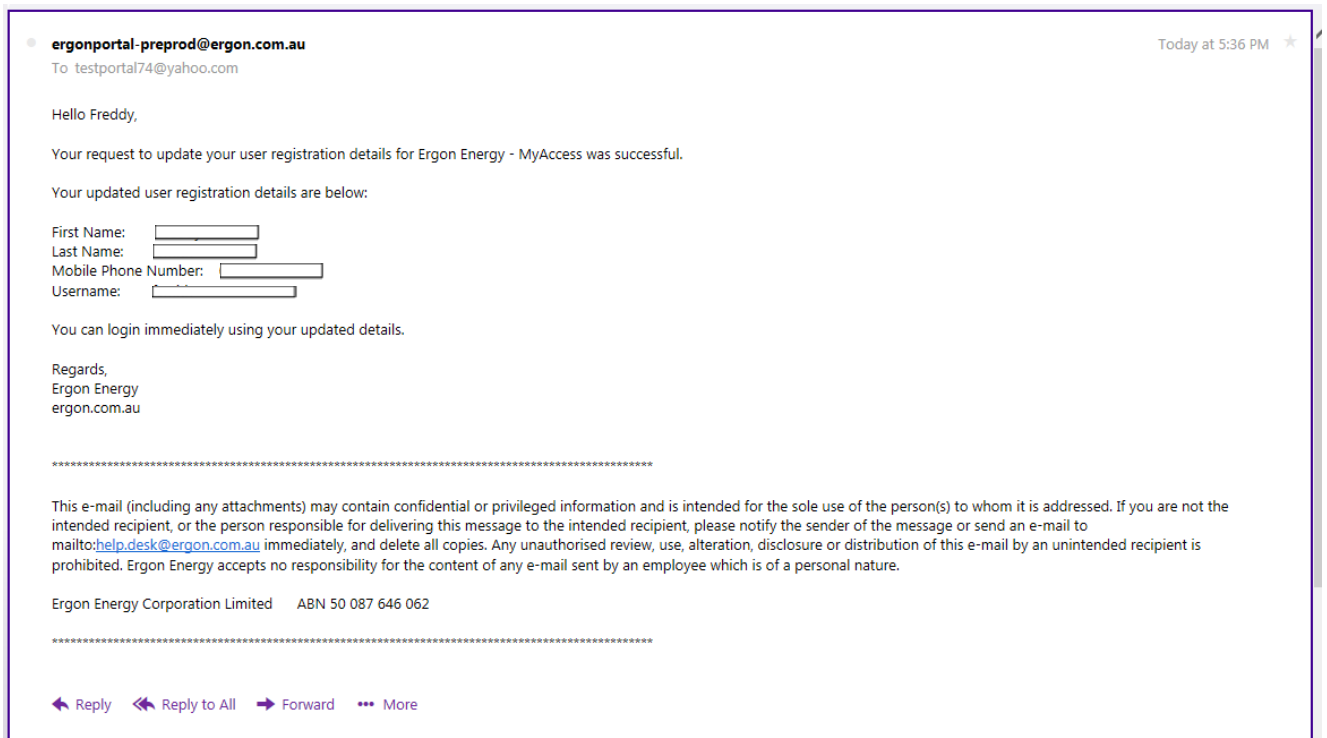
First Name*	Jim
Last Name*	tester
Mobile Phone Number	N/A
Username*	tester313

[Cancel](#) [Back](#) [Confirm](#)

6. Your updates are now saved and you can click **Complete** to return to your Registration Details screen.



7. An email will be sent to your registered email address confirming the updates.



NEED TO KNOW

Some changes made to your Registration Details will not be visible on your MyProfile screen until your next login.

Update Email Address

8. Back on your Registration Details screen, click **Update** in the **Update Email Address** section.

Registration Details

Fields marked with * are mandatory fields.
To change your details, click Update.

Update User Registration Details

First Name*	<input type="text"/>
Last Name*	<input type="text"/>
Mobile Phone Number	<input type="text"/>
Username*	<input type="text"/>

[Update](#)

Update Email Address

Email Address*	testportal74@yahoo.com
----------------	------------------------

[Update](#)

Update Password

Password*	*****
-----------	-------

[Update](#)

9. Update your Email Address and click **Submit**.

Change email address

Fields marked with * are mandatory fields.

Your current email address: tester313@mailinator.com

Once you have entered a new email address, click Submit.

Email Address*	<input type="text"/>
----------------	----------------------

Your email address will assist with retrieving your forgotten username or password.

[Back](#) [Submit](#)

10. You will be asked if you are sure you want to change your email address. Click **Confirm**.

Change email address

Are you sure you want to change your email address? Click Confirm to continue.

From: tester313@mailinator.com

To: jimjones@gmail.com

An email will be forwarded to your updated email address for you to activate. An email will also be forwarded to your original email address confirming this change request.

Cancel BACK **Confirm**

11. An email will be sent to your **new** email address to confirm this change. You must click on the **link in the email** to activate your change of email address. For security, an email is also sent to your old email address notifying you of the change.

Activate your change of email address

Check your email!

- We have sent an email to your updated registered email address
- Look for a message with the subject: Activate your changed email address
- Click the link in the email to activate your changed email address

Didn't receive our email?

- Check that your updated email address is spelt correctly
- Check your email address's junk or spam folder
- Still didn't receive the email? Please try again to ensure your email address is correct. If you are still experiencing issues, please call us for assistance on 13 10 46

NEED TO KNOW

The activation link sent to your new email address is only **valid for 24hours**. Your request to change email address will only be complete once this link is activated.

12. Once you click on the activation link at your new email address, you will receive the message – **“Your new email address now activated.”** Click **Complete** and you will be returned to your Registration Details screen.

Email address now activated

Your new email address is now activated.

You can now login using your username and password.

Complete

Update Password

13. Back on your Registration Details screen, click **Update** in the **Update Password** section.

The screenshot shows the 'Registration Details' page. At the top, it says 'Fields marked with * are mandatory fields. To change your details, click Update.' Below this are three sections: 'Update User Registration Details' with fields for First Name*, Last Name*, Mobile Phone Number, and Username*; 'Update Email Address' with the email 'testportal74@yahoo.com'; and 'Update Password' with a Password* field containing '*****'. The 'Update' button in the 'Update Password' section is highlighted with a red box.

14. Enter your current password, then enter your new password twice. If you use a password that you have already used in the last six passwords, you will receive an error. Click **Submit**.

The screenshot shows the 'Change password' page. It includes the instruction 'Fields marked with * are mandatory fields.' and three input fields: 'Enter your current password*' (filled with '*****'), 'Create a new password*' (filled with '*****' and has a help icon), and 'Confirm New Password*' (filled with '*****'). Below the fields, it says 'Your password is case sensitive. You need your password and username to login.' At the bottom left is a 'Back' button, and at the bottom right is a 'Submit' button highlighted with a red box.

15. You will receive confirmation that your password has been changed. A **confirmation email** is also sent to your registered email address to notify you of the password change. Click **Back to My Profile**.

Password has been changed

Your password has been changed.

On your next login, you will need to use your username and your new password.

[Back to My Profile](#)

16. You will be returned to your Registration Details screen. Click **Back to My Profile** again.

Registration Details

Fields marked with * are mandatory fields.
To change your details, click Update.

Update User Registration Details

First Name*

Last Name*

Mobile Phone Number

Username*

[Update](#)

Update Email Address

Email Address* testportal74@yahoo.com [Update](#)

Update Password

Password* [Update](#)

[BACK TO MY PROFILE](#)

17. You will be asked to login to the Portal again with your **new password**.

Login

Fields marked with * are mandatory fields.

Please enter your username and password below to login.

Username* [Forgotten your Username?](#)

Password* [Forgotten your Password?](#)

[Sign In](#)

Not registered yet?
[Register Now](#)

Update Clean Energy Council Details

If you have **multiple** CEC Accreditation Numbers or your existing CEC Accreditation Number has **expired**, enter your new or additional numbers on your **MyProfile** screen.

To add another CEC Accreditation Number:

1. On your **MyProfile** screen, enter your CEC Accreditation Number in the field provided and click **Check**. Ensure the **name** that displays is correct. Next click **Add CEC Number**.

MyProfile

Registration Details

Username: Email:

First Name: Mobile Phone:

Last Name:

Having trouble updating your details? Try a different browser.

Clean Energy Council Details

If you have multiple CEC Accreditations or need to replace an expired Accreditation, enter the CEC number, check it then click 'Add CEC Number'. Please enter your Clean Energy Council (CEC) Accreditation Number:

Accreditation Number	Licencee	Status
<input type="text"/>	<input type="text"/>	Current

2. You will be asked to confirm that you wish to continue. Click **Yes**.

Confirmation ✕

You are about to register this CEC Accreditation on your profile.

Are you sure you wish to continue?

If your CEC Accreditation Number has expired, this status will automatically update from Current to Expired.

3. You will now see the new number in your **Accreditation Number list**. When submitting a CONNECT Application, this number will now appear under the Clean Energy Council Accreditation No. field.

MyProfile

Registration Details

Username: Email:

First Name: Mobile Phone:

Last Name:

Having trouble updating your details? Try a different browser.

Clean Energy Council Details

If you have multiple CEC Accreditations or need to replace an expired Accreditation, enter the CEC number, check it then click 'Add CEC Number'.
Please enter your Clean Energy Council (CEC) Accreditation Number:

✓

Accreditation Number	Licencee	Status
<input type="text"/>	Freddy Smith	Current
<input type="text"/>	Scott Keid	Current

NEED TO KNOW

When submitting a new CONNECT Application, **expired CEC Accreditation Numbers** will no longer appear in the drop-down list under the Clean Energy Council Accreditation No. field.

You **can't delete** an expired CEC Accreditation Number.

Update EWR Notifications

If you have registered in the Portal under an **ESO Licenced Electrical Contractor Number**, you will see **Manage My Notifications** on your MyProfile screen.

Manage My Notifications allows you to set-up **your default notice settings for all EWRs**.

1. Select which status update notices you wish to receive by **ticking Email, SMS or both**. When finished click **Save Settings**.
You will automatically receive update notices on Incomplete (Open) and/or Completed (Closed) Form 3s.

Manage My Notifications

Use my Registration Email Address

Change my Notification Email Address to:

Use my Registration Mobile Number

Change my Notification Mobile Number to:

NEED TO KNOW

These are your default notice settings for all EWRs.

When submitting a new EWR, you can change these settings for that particular work request.

Status	Notify Me By
Awaiting Retailer Request	<input checked="" type="checkbox"/> Email <input type="checkbox"/> SMS
Retailer Request Received	<input checked="" type="checkbox"/> Email <input type="checkbox"/> SMS
Work Scheduled	<input checked="" type="checkbox"/> Email <input checked="" type="checkbox"/> SMS
Appointment Set	<input checked="" type="checkbox"/> Email <input checked="" type="checkbox"/> SMS
Cancelled due to Scheduling	<input checked="" type="checkbox"/> Email <input checked="" type="checkbox"/> SMS
Cancelled by Retailer	<input type="checkbox"/> Email <input checked="" type="checkbox"/> SMS
Completed	<input type="checkbox"/> Email <input checked="" type="checkbox"/> SMS
Incomplete - Form 3 Left	<input checked="" type="checkbox"/> Email <input checked="" type="checkbox"/> SMS
Completed - Form 3 Left	<input checked="" type="checkbox"/> Email <input checked="" type="checkbox"/> SMS
Closed - No Access	<input checked="" type="checkbox"/> Email <input checked="" type="checkbox"/> SMS
Retailer Request Cancelled	<input checked="" type="checkbox"/> Email <input checked="" type="checkbox"/> SMS
EWR Processing	<input checked="" type="checkbox"/> Email <input checked="" type="checkbox"/> SMS
MP to Complete	<input checked="" type="checkbox"/> Email <input checked="" type="checkbox"/> SMS

Hover your mouse over a Status type to see the definition.



You will automatically be notified on Form 3 Left updates

Save Settings

2. The notification email address and mobile number **automatically defaults** to those in your **Registration Details**.

To send your EWR status update notices to a different email and/or mobile, select **Change my Notification Email Address to** and/or **Change my Notification Mobile Number to** and enter the new details in the blank fields.

Click **Save Settings** when done.

Manage My Notifications

Use my Registration Email Address

Change my Notification Email Address to:

Use my Registration Mobile Number

Change my Notification Mobile Number to:

NEED TO KNOW

If you need to make any changes to your notification email address or mobile number, you will receive an email to confirm that these changes have been made.

Update My Groups


Businesses are set-up as “**Groups**” in the Electrical Partners Portal.

This is because if more than one person works under a licence/accreditation number, they can all register to the same Group (or business) in the Portal

Each Group has a “**Group Manager**” who sets it up in the Portal and manages its Members.

At the bottom of your **MyProfile** screen you will see **My Groups**. This section displays all the Groups you are subscribed to.

My Groups

Group Name	Group Reference	My Role	My Status	
<input type="text"/>	<input type="text"/>	Manager	Approved	<input type="button" value="Manage"/> <input type="button" value="Unsubscribe"/>
<input type="text"/>	<input type="text"/>	Manager	Approved	<input type="button" value="Manage"/> <input type="button" value="Unsubscribe"/>
 <input type="text"/>	<input type="text"/>	Member	Pending Approval	<input type="button" value="Cancel Request"/>

- **Group Name** – this is the business you have subscribed to.
- **Group Reference** – this is the Ergon Group Reference (ERG) number that identifies your group in the Portal. The Electrical Contractor Licence Number also displays.
- **My Role** – shows if you are a Manager or a Member in your Group.
- **My Status** – this is your Group subscription status, eg. approved or pending approval.
- **Manage button** – this will only appear if you are the **Group Manager**. It allows you to:
 - change a user’s role in your Group
 - approve or decline subscription requests to your Group
 - view all members in your Group
 - update your business details
- **Unsubscribe button** – this will only appear when your Group subscription request has been approved.
- **Cancel Request button** – this will only appear if your Group subscription request is pending approval.
- **Subscribe to another Group** – if you work for more than one business, you can subscribe to another Group.

How to subscribe to another Group

When you register to the Portal you are asked to subscribe to a Group. If you work for a number of businesses, you can subscribe to additional Groups.

1. Click **Subscribe to another Group**.

[My Groups](#)

Group Name	Group Reference	My Role	My Status		
<input type="text"/>	<input type="text"/>	Manager	Approved	Manage	Unsubscribe
<input type="text"/>	<input type="text"/>	Manager	Approved	Manage	Unsubscribe

[Subscribe to another Group](#)

2. Select your subscription type. Your three options include:

- ESO Licenced Electrical Contractor – go to **step 3 below**
- CEC Accredited Solar Installer – go to **step 7 below**
- Other Electrical Partner (eg Admin Staff) – go to **step 12 below**

Join a Group as an Electrical Contractor

3. Select **ESO Licenced Electrical Contractor** and enter your Electrical Contractor (EC) Licence Number. Click on **Check** to validate the number. Ensure the name that displays is correct.

Electrical Partners Portal Subscription

Please select additional subscriptions

- ESO Licenced Electrical Contractor
 CEC Accredited Solar Installer
 Other Electrical Partner
 Retailer

Please enter a valid **Electrical Contractor (ESO) Licence Number**

✓

ENSOR ELECTRICAL PTY LTD

NEED TO KNOW

The Electrical Contractor (EC) Licence Number entered is validated against information provided to us from the ESO. If the number is not valid, you will receive a message which will tell you the status.

Tick the **Terms and Conditions** box at the bottom of the page (read the Terms of Use if you haven't already) and click **Next**.

Terms and Conditions

I accept the [Terms of use](#) for the Ergon Energy Portal.

[Next >>](#)

4. You will see a **Subscription Confirmation** message and an email will be sent to the **Group Manager** to **approve** your membership subscription request. You will also be sent an email confirming your subscription request and advising how to check the status.

Subscription Confirmation

Thank you for your subscription request to join EC Licence # [] for [].
An email has been sent to the Group Manager of EC Licence #68025 to approve your request to join this Group.
An email has also been sent to your registered email address confirming your subscription request and how to check your subscription status.
You will receive an email confirming your subscription once the Group Manager has approved your request.

Next >>

Your subscription request is pending Group Manager approval.

You will be sent another email when the Group Manager **approves** your membership subscription. Once approved, you can start submitting EWRs under the EC Licence Number.

Click **Next** and you will be returned to your **MyProfile** screen.

5. Scroll down to the bottom of your MyProfile screen to **My Groups** and you will see that your Member request is **Pending Approval**.

My Groups

Group Name	Group Reference	My Role	My Status	
[]	[]	Manager	Approved	Manage Unsubscribe
[]	[]	Member	Pending Approval	Cancel Request

Subscribe to another Group

NEED TO KNOW

You **cannot submit** any EWR's under an EC Licence Number until the Group Manager has **approved** your request to be a Member of the Group.

You will be sent an email when your request is approved.

Join a Group as a Solar Installer

6. Select **CEC Accredited Solar Installer** and enter the CEC Accreditation Number. Click on **Check** to validate the number. Ensure the name that displays is correct.

Electrical Partners Portal Subscription

Please select additional subscriptions

ESO Licenced Electrical Contractor

CEC Accredited Solar Installer

Other Electrical Partner

Retailer

[? I'm not sure what to select](#)

Please enter your Clean Energy Council (CEC) Accreditation Number

✓

NEED TO KNOW

The CEC Accreditation Number entered is validated against information provided to us from the CEC. If the number is not valid, you will receive a message which will tell you the status.

7. Select **Join a Group using an Ergon Group Reference**. Enter the number (you need to get this from your Group Manager), click on **Check** and ensure the name that displays is correct.

Are you creating a new Group or joining a Group?

Create a new Group

Join a Group using an Ergon Group Reference

[? I'm not sure what to select](#)

Enter the Ergon Group Reference.
Use the correct format of ERG000 and check that the Group name is correct before continuing.

✓

Before you begin, ask your Group Manager for the Ergon Group Reference number for their CEC Accreditation Number.

8. Tick the **Terms and Conditions** box at the bottom of the page (read the Terms of Use if you haven't already) and click **Next**.

Terms and Conditions

I accept the [Terms of use](#) for the Ergon Energy Portal.

Next >>

9. You will see a **Subscription Confirmation** message and an email will be sent to the **Group Manager** to **approve** your request to join the Group. You will also be sent an email confirming your subscription request and advising how to check the status. You will be sent another email when the Group Manager **approves** your membership subscription.

Click **Next** and you will be returned to your **MyProfile** screen.

Subscription Confirmation

i Thank you for your subscription request to join Fred Smith Installers ([]).

An email has been sent to the Group Manager for Fred Smith Installers to approve your request to join this group.

An email has also been sent to your registered email address confirming your subscription request and how to check your subscription status.


You will receive an email confirming your subscription once the Group Manager has approved your request.

Next

Your subscription request is pending Group Manager approval.

10. Scroll down to the bottom of your MyProfile screen to **My Groups** and you will see that your Member request is **Pending Approval**.

My Groups

Group Name	Group Reference	My Role	My Status	
[]	[]	Manager	Approved	Manage Unsubscribe
 []	[]	Member	Pending Approval	Cancel Request

Subscribe to another Group

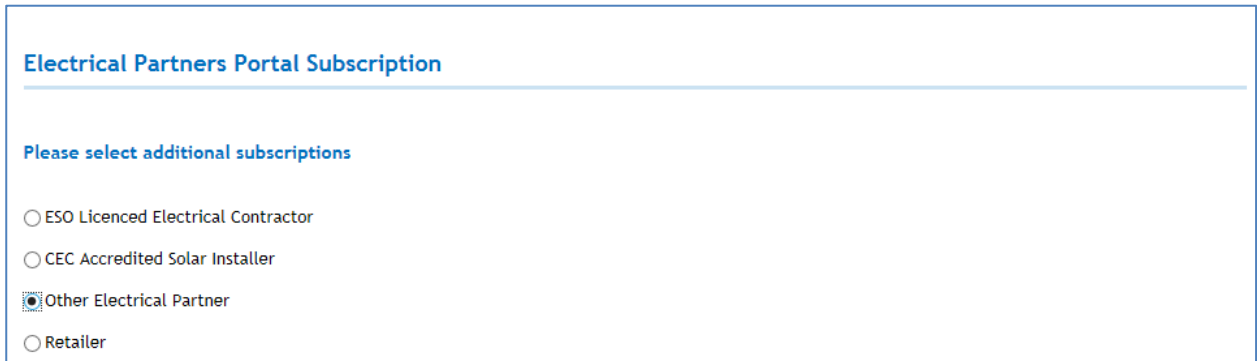
NEED TO KNOW

You **cannot submit** any CONNECT Applications under a CEC Accreditation Number until the Group Manager has **approved** your request to be a Member of the Group.

You will be sent an email when your request is approved.

Join a Group as another Electrical Partner (e.g. admin staff, spouse)

11. Select the **Other Electrical Partner** option.

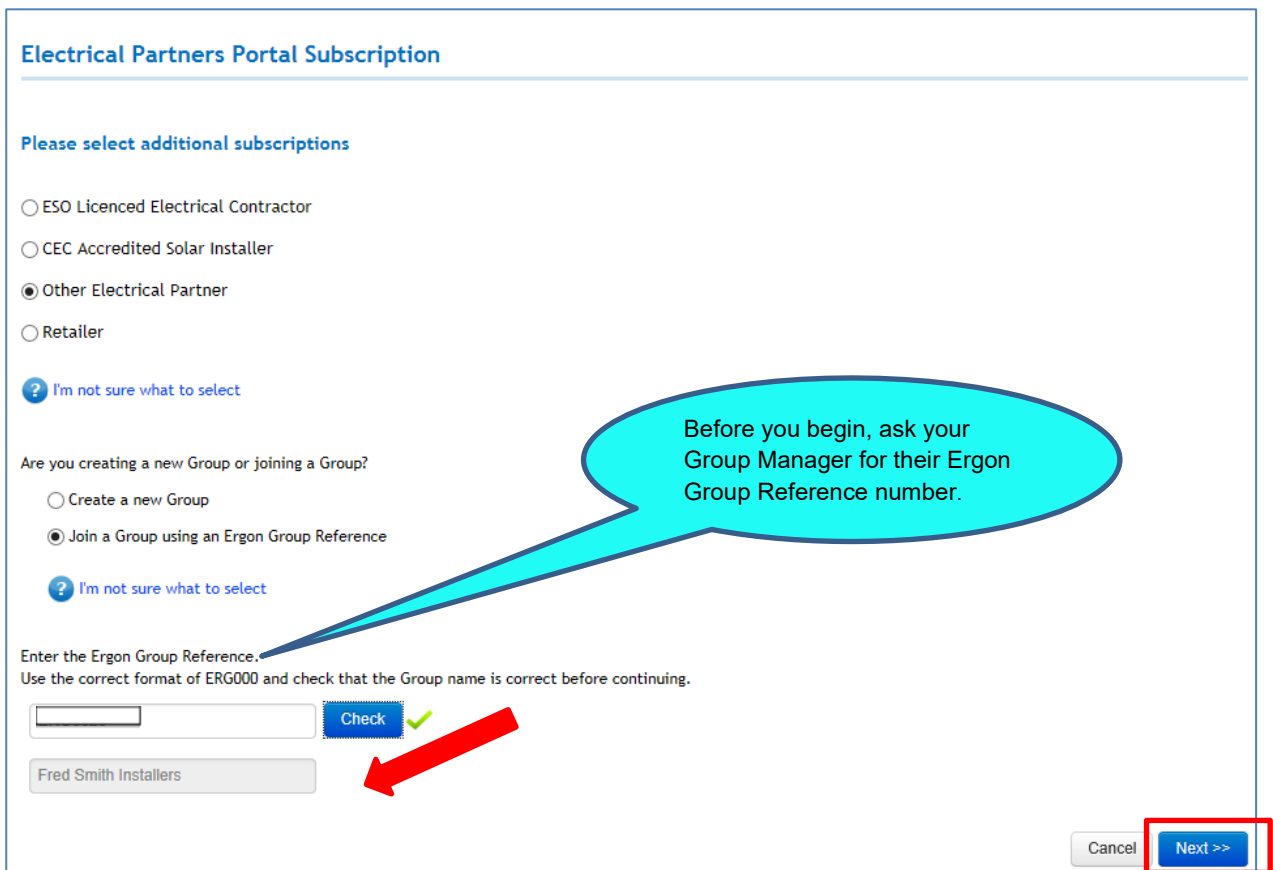


Electrical Partners Portal Subscription

Please select additional subscriptions

- ESO Licenced Electrical Contractor
- CEC Accredited Solar Installer
- Other Electrical Partner
- Retailer

12. Enter your **Ergon Group Reference** number that has been given to you by your Group Manager. Click on **Check** and ensure the name that displays is correct. Click **Next**.



Electrical Partners Portal Subscription

Please select additional subscriptions

- ESO Licenced Electrical Contractor
- CEC Accredited Solar Installer
- Other Electrical Partner
- Retailer

[? I'm not sure what to select](#)

Are you creating a new Group or joining a Group?

- Create a new Group
- Join a Group using an Ergon Group Reference

[? I'm not sure what to select](#)

Enter the Ergon Group Reference.
Use the correct format of ERG000 and check that the Group name is correct before continuing.

✓

Before you begin, ask your Group Manager for their Ergon Group Reference number.

13. You will see a **Subscription Confirmation** message and an email will be sent to the **Group Manager** to **approve** your request to join the Group. You will also be sent an email confirming your subscription request and advising how to check the status. You will be sent another email when the Group Manager **approves** your membership subscription.

Click **Next** and you will be returned to your **MyProfile** screen.

Subscription Confirmation


i Thank you for your subscription request to join Fred Smith Installers ({}).
An email has been sent to the Group Manager for Fred Smith Installers to approve your request to join this group.
An email has also been sent to your registered email address confirming your subscription request and how to check your subscription status.
You will receive an email confirming your subscription once the Group Manager has approved your request.

Your subscription request is pending Group Manager approval

Next

14. Scroll down to the bottom of your MyProfile screen to **My Groups** and you will see that your Member request is pending approval.

My Groups

Group Name	Group Reference	My Role	My Status	
<input type="text"/>	<input type="text"/>	Manager	Approved	Manage Unsubscribe
 <input type="text"/>	<input type="text"/>	Member	Pending Approval	Cancel Request

Subscribe to another Group



NEED TO KNOW

When you subscribe to more than one Group, you will find when you submit a new EWR or CONNECT Application you will need to select from a drop down list which business you wish to submit the form under.

How to unsubscribe from a Group

If you no longer work for a business, you can cancel your subscription to its Group in the Portal. It's a slightly different process for **Group Members** and **Group Managers**.

Group Members with Pending Approval status

1. If your Member status is **Pending Approval**, click **Cancel Request**.

My Groups

Group Name	Group Reference	My Role	My Status	
<input type="text"/>	<input type="text"/>	Manager	Approved	<input type="button" value="Manage"/> <input type="button" value="Unsubscribe"/>
<input type="text"/>	<input type="text"/>	Manager	Approved	<input type="button" value="Manage"/> <input type="button" value="Unsubscribe"/>
 <input type="text"/>	<input type="text"/>	Member	Pending Approval	<input type="button" value="Cancel Request"/>

2. You will be asked to confirm your request, click **Yes**.

Confirmation ✕

This will cancel the pending subscription request and remove it from the list

Do you wish to continue?

The Group is **removed** from your My Groups list.

My Groups

Group Name	Group Reference	My Role	My Status	
<input type="text"/>	<input type="text"/>	Manager	Approved	<input type="button" value="Manage"/> <input type="button" value="Unsubscribe"/>
<input type="text"/>	<input type="text"/>	Manager	Approved	<input type="button" value="Manage"/> <input type="button" value="Unsubscribe"/>

Group Members with Approved status

1. If your Member status is **Approved**, click **Unsubscribe**.

My Groups

Group Name	Group Reference	My Role	My Status		
<input type="text"/>	<input type="text"/>	Manager	Approved	Manage	Unsubscribe
<input type="text"/>	<input type="text"/>	Member	Approved		Unsubscribe

2. You will see a message box asking you to confirm that you wish to remove yourself from this particular Group. Click **Confirm**.

Confirmation ✕

Are you sure you wish to remove yourself from this group?

You will no longer be able to manage this Group.

NEED TO KNOW

If you unsubscribe yourself from your only Group, **your access** to the Portal will be **removed** and you will be taken back to the Portal Subscription page. To access the Portal again, you will need to subscribe to another Group.

3. You will see that your status is now **Unsubscribed**. If you wish to remove the Group from your list, click the **Delete** button that now appears.

My Groups

Group Name	Group Reference	My Role	My Status		
<input type="text"/>	<input type="text"/>	Manager	Approved	Manage	Unsubscribe
<input type="text"/>	<input type="text"/>	Member	Unsubscribed		Delete

[Subscribe to another Group](#)

4. You will see a message box asking you to confirm, click **Yes**.

Confirmation ✕

This will delete the membership from your list

Do you wish to continue?

NEED TO KNOW

When you unsubscribe from a Group, an email will be sent to the Group Manager and to your registered email address advising that you have removed your subscription.

5. The Group is **removed** from your My Groups list.

My Groups

Group Name	Group Reference	My Role	My Status		
<input type="text"/>	<input type="text"/>	Manager	Approved	Manage	Unsubscribe

[Subscribe to another Group](#)

Group Managers

The Portal will not allow you to unsubscribe from a Group if you are the **only** Group Manager. **There must be another Group Manager to take over.**

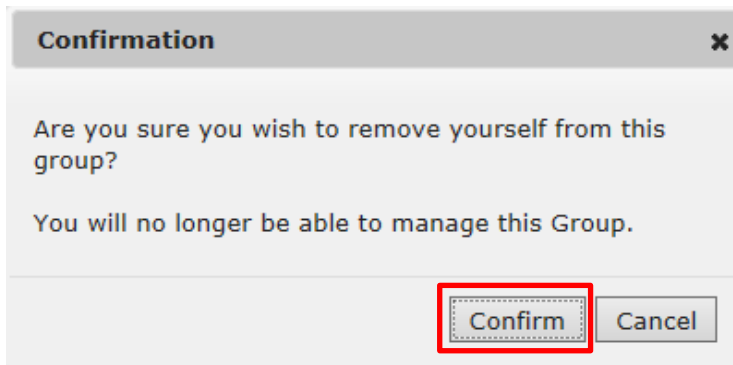
You will need to change a Member to a Group Manager before you can unsubscribe yourself.

If there is no other Group Manager to take over, you will need to email us at ergonportal@ergon.com.au to **disable your Group from the Portal.**

1. If there is another Group Manager set-up in your Group, go to your **MyProfile** screen and under **My Groups** click **Unsubscribe.**



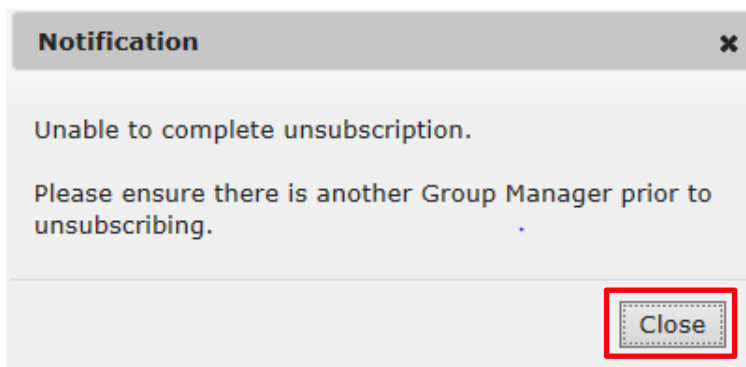
2. You will be asked if you are sure, click **Confirm.**



NEED TO KNOW

If you unsubscribe yourself from your only Group, **your access** to the Portal will be **removed** and you will be taken back to the Portal Subscription page. To access the Portal again, you will need to subscribe to another Group.

If there actually isn't another Group Manager, you will see this message box. Click **Close.**



3. You will see that your status is now **Unsubscribed**. If you wish to remove the Group from your list, click the **Delete** button that now appears.

My Groups

Group Name	Group Reference	My Role	My Status		
<input type="text"/>	<input type="text"/>	Manager	Approved	Manage	Unsubscribe
<input type="text"/>	<input type="text"/>	Manager	Unsubscribed		Delete

Subscribe to another Group

4. You will see a message box asking you to confirm, click **Yes**.

Confirmation ✕

This will delete the membership from your list

Do you wish to continue?

5. The Group is **removed** from your My Groups list.

My Groups

Group Name	Group Reference	My Role	My Status		
<input type="text"/>	Group Ref# <input type="text"/>	Manager	Approved	Manage	Unsubscribe

Subscribe to another Group

NEED TO KNOW

The Portal will **not allow** you to unsubscribe yourself if you are the **only Group Manager**. You will need to change a Member to a Group Manager before you can unsubscribe yourself.

If you are the only user for your Group (set-up as a Group Manager) you will need to email us at ergonportal@ergon.com.au to disable your Group from the Portal.

Group Manager Functions

How to update your Group's business details

Group Managers can update the Group's business details in the Portal, like Business Name, ABN, Physical Address or Group Contact Details.

1. On your MyProfile screen under **My Groups** at the bottom, click on the **Manage** button next to the group you wish to update. In this case its Group **Freddy Smith Installers**.

My Groups

Group Name	Group Reference	My Role	My Status		
<input type="text"/>	<input type="text"/>	Manager	Approved	Manage	Unsubscribe
<input type="text"/>	<input type="text"/>	Manager	Approved	Manage	Unsubscribe

Subscribe to another Group

2. The **Manage Group** screen will open. You will see the **Group Details** at the top and **Group Members** at the bottom. **Update** the required details and click **Save Details**.

Manage Group

Group Details

Business Name

ABN

Group Contact Details

Contact Name

Contact Email

Business Phone

Business Fax

Physical Address

Street Address

Suburb

State

Postcode

Postal Address

Use Physical Address

Postal Street Address

Postal Suburb

Postal State

Postal Postcode

Save Details

Group Members


Name	Username	Mobile Phone	Role ?	Status	
<input type="text"/>	Fsmith@preprod-central-iam.local	<input type="text"/>	Manager	Approved	Unsubscribe

How to approve or decline a Member subscription request

The Group Manager will receive an **email** each time a new Member subscribes to their Group. It is the Group Managers' responsibility to login to the Portal and **approve or decline** Member subscription requests.

1. On your MyProfile screen under **My Groups** at the bottom, click on the **Manage** button.

My Groups

Group Name	Group Reference	My Role	My Status		
<input type="text"/>	<input type="text"/>	Manager	Approved	Manage	Unsubscribe
<input type="text"/>	<input type="text"/>	Manager	Approved	Manage	Unsubscribe
 <input type="text"/>	<input type="text"/>	Member	Pending Approval	Cancel Request	

[Subscribe to another Group](#)

2. The Manage Group screen will open. Scroll down to **Group Members**. Look for the member who is requesting to subscribe to your Group - their Status will be **Pending Approval**. Click on either **Approve** or **Decline** to accept or reject their request.

Group Members

Name	Username	Mobile Phone	Role ?	Status	
Freddy Smith	Fsmith@preprod-central-iam.local	<input type="text"/>	Manager	Approved	Unsubscribe
<input type="text"/>	Beccyob@preprod-central-iam.local	<input type="text"/>	Member	Pending Approval	Approve Decline

3. You will see a message box asking you to confirm, click **Confirm** to complete the action.

Confirmation ✕

You are about to Approve membership to your Group.
Click confirm to complete.

Confirm Cancel

Confirmation ✕

You are about to Decline membership to your Group.
Click confirm to complete.

Confirm Cancel

4. If you Approved their subscription request, you will see their Status has changed to **Approved**.

Group Members

Name	Username	Mobile Phone	Role ?	Status	
<input type="text"/>	Beccyob@preprod-central-iam.local	<input type="text"/>	Manager	Approved	Unsubscribe
<input type="text"/>	Fsmith@preprod-central-iam.local	<input type="text"/>	Member	Approved	Unsubscribe

The person who was Approved membership will see a status of **Approved** on their My Groups profile.

My Groups

Group Name	Group Reference	My Role	My Status		
<input type="text"/>	<input type="text"/>	Manager	Approved	Manage	Unsubscribe
<input type="text"/>	<input type="text"/>	Member	Approved		Unsubscribe

[Subscribe to another Group](#)

5. If you Declined their subscription request, you will see their Status has changed to **Declined**.

Group Members

Name	Username	Mobile Phone	Role ?	Status	
<input type="text"/>	Fsmith@preprod-central-iam.local	<input type="text"/>	Manager	Approved	Unsubscribe
<input type="text"/>	Beccyob@preprod-central-iam.local	<input type="text"/>	Member	Declined	

The person who was Declined membership will see a status of **Denied** on their My Groups profile.

My Groups

Group Name	Group Reference	My Role	My Status		
<input type="text"/>	<input type="text"/>	Manager	Approved	Manage	Unsubscribe
<input type="text"/>	<input type="text"/>	Manager	Approved	Manage	Unsubscribe
<input type="text"/>	<input type="text"/>	Member	Denied		Delete

[Subscribe to another Group](#)

NEED TO KNOW

An email is sent to the Member to advise the outcome of their subscription request, whether they have been approved or declined. An email is also sent to the Group Manager.

Once a member is approved, they can access the Portal straight away.

Change Role from Member to Manager OR Manager to Member

Group Managers can change the **Role** of Members in their Group. There are two types of roles:

- **Group Manager** – can view all EWRs and/or CONNECT Applications submitted for the Group (or business) as well as the responsibility to approve, decline or unsubscribe (remove) members from the Group. Users who are set up as the Group Manager will receive emails sent from the Portal when a Member's details change.
- **Member** – can only view EWRs and/or CONNECT Applications they have submitted for their Group (or business).

In this Group you can see there is one **Manager** and one **Member**.

Name	Username	Mobile Phone	Role ?	Status	
<input type="text"/>	Beccyob@preprod-central-iam.local	<input type="text"/>	Manager	Approved	Unsubscribe
<input type="text"/>	Fsmith@preprod-central-iam.local	<input type="text"/>	Member	Approved	Unsubscribe

NEED TO KNOW

Only a Group Manager can change Roles from Member to Manager or Manager to Member.

Change a Member to a Manager

1. On your MyProfile screen under **My Groups** at the bottom, click on the **Manage** button next to the group you wish to update.

My Groups

Group Name	Group Reference	My Role	My Status		
<input type="text"/>	<input type="text"/>	Manager	Approved	Manage	Unsubscribe
<input type="text"/>	<input type="text"/>	Manager	Approved	Manage	Unsubscribe
<input type="text"/>	<input type="text"/>	Member	Denied		Delete

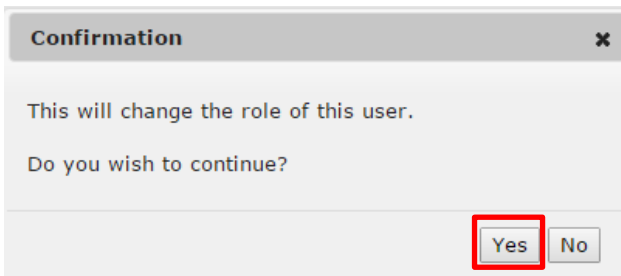
[Subscribe to another Group](#)

2. The Manage Group screen will open. Scroll down to **Group Members**. Click on the **drop down arrow** beside the Member whose role you wish to change. In this case its **Member Freddy Smith**. Select **Manager**.

Group Members

Name	Username	Mobile Phone	Role ?	Status	
<input type="text"/>	Beccyob@preprod-central-iam.local	<input type="text"/>	Manager	Approved	Unsubscribe
<input type="text"/>	Fsmith@preprod-central-iam.local	<input type="text"/>	Member	Approved	Unsubscribe

3. You will be asked to confirm your action. Click **Yes** to complete the action.



4. Freddy Smith has been changed to a **Manager**.

Group Members

Name	Username	Mobile Phone	Role ?	Status	
<input type="text"/>	Beccyob@preprod-central-iam.local	<input type="text"/>	Manager	Approved	Unsubscribe
<input type="text"/>	Fsmith@preprod-central-iam.local	<input type="text"/>	Manager	Approved	Unsubscribe

5. You can change it back again by clicking on the drop down arrow and selecting **Member**.

Group Members

Name	Username	Mobile Phone	Role ?	Status	
<input type="text"/>	Beccyob@preprod-central-iam.local	<input type="text"/>	Manager	Approved	Unsubscribe
<input type="text"/>	Fsmith@preprod-central-iam.local	<input type="text"/>	Manager Member Manager	Approved	Unsubscribe

NEED TO KNOW

When a user's Role is changed, an email is sent to the user to advise them of the change.

Change the Manager to a Member

NEED TO KNOW

Only when there are **two or more Managers** in your Group can you change your Role from **Manager to Member**. There must always be **at least one** Manager in a Group.

1. On your MyProfile screen under **My Groups** at the bottom, click on the **Manage button** next to the group you wish to update. In this case its Group **Bec Test Electrical**.

My Groups

Group Name	Group Reference	My Role	My Status	
<input type="text"/>	<input type="text"/>	Manager	Approved	<input type="button" value="Manage"/> <input type="button" value="Unsubscribe"/>
<input type="text"/>	<input type="text"/>	Manager	Approved	<input type="button" value="Manage"/> <input type="button" value="Unsubscribe"/>
<input type="text"/>	<input type="text"/>	Member	Denied	<input type="button" value="Delete"/>

2. The Manage Group screen will open. Scroll down to **Group Members**. This group has two Managers, so it's possible to change **one** to a Member.

Group Members

Name	Username	Mobile Phone	Role ?	Status
<input type="text"/>	Beccyob@preprod-central-iam.local	<input type="text"/>	Manager	Approved <input type="button" value="Unsubscribe"/>
<input type="text"/>	Fsmith@preprod-central-iam.local	<input type="text"/>	Manager	Approved <input type="button" value="Unsubscribe"/>

3. Click on the **drop down arrow** and select **Member**.

Group Members

Name	Username	Mobile Phone	Role ?	Status
<input type="text"/>	Beccyob@preprod-central-iam.local	<input type="text"/>	Manager	Approved <input type="button" value="Unsubscribe"/>
<input type="text"/>	Fsmith@preprod-central-iam.local	<input type="text"/>	Manager	Approved <input type="button" value="Unsubscribe"/>

4. You will be asked to confirm your action. Click **Yes** to complete the action.

Confirmation ✕

Are you sure you wish to change your Manager role?
You will no longer be able to manage this Group.

5. You will be taken back to your **MyProfile** screen. Scroll down to **My Groups** and you will see that you are now a **Member only** and you no longer have a **Manage button** next to that group.

[My Groups](#)

Group Name	Group Reference	My Role	My Status	
<input type="text"/>	<input type="text"/>	Manager	Approved	<input type="button" value="Manage"/> <input type="button" value="Unsubscribe"/>
<input type="text"/>	<input type="text"/>	Member	Approved	<input type="button" value="Unsubscribe"/>

6. If you want to go back to being a **Manager** for that Group, the remaining Group Manager will have to change your status for you.

Subscription Emails

Each time you create a new Group or join an existing Group within the Portal, you will receive emails which advise where your subscription status is at, or what change you have made.

These emails will be sent for a number of reasons such as:

- A Group Manager subscribing to the Portal for the first time
- A Member subscribing to the Portal for the first time
- A Group Manager or Member unsubscribing from the Portal
- A Group Manager or Member is unsubscribed from the Portal by the Group Manager
- A Member cancels their pending subscription request under My Groups
- A Group Manager changes the role of a Member or Group Manager under My Groups
- A Group Manager updates any business details under My Groups
- A Group Manager or Member changes their email address under Manage My Notifications
- A Group Manager or Member changes their mobile number under Manage My Notifications

Following are some examples of subscription emails.

Email to the Group Manager

Confirmation number: 32766

Hello (Beccyob@preprod-central-iam.local).

You have the following pending subscription request:

Freddy Smith (Fsmith@preprod-central-iam.local) has requested to subscribe to ZKC Electrical on 14 March at 11:41:01 AM.

How to approve / decline subscription requests on the Portal
Approving / declining a request is easy, simply follow the steps below:

Visit the Ergon Energy Portal website at <http://www.ergon.com.au/ergonportals>
Enter your Username and Password
Select Manage My Groups from the My Profile section
Then follow the prompts

Any questions?

If you have any questions or would like further information, please email ergonportal@ergon.com.au or call us on 13 74 66.

Regards,

Ergon Energy Portal Team

Email to the Member

Confirmation number: 32766

Hello [redacted] (Fsmith@preprod-central-iam.local).

Thank you for your subscription request to join the Ergon Energy Electrical Partners Portal.

Your request to join as a Group Member to [redacted] on 14 March at 11:41:01 AM is awaiting Group Manager approval.

How to check the status of your subscription on the Portal

Checking the status of your subscription is easy, simply follow the steps below:

Visit the Ergon Energy Portal website at <http://www.ergon.com.au/ergonportals>

Enter your Username and Password

Then follow the prompts

Alternatively, once your Group Manager has approved your request, you will receive an email.

Any questions?

If you have any questions or would like further information, please email ergonportal@ergon.com.au or call us on 13 74 66.

Regards,

Ergon Energy Portal Team