CleanCo Customer Portal

User Guide

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1. Establishing your Portal Access

1.1. Initial set up and sign-in to the CleanCo Customer Portal

- If you have already completed Multi-Factored Authentication (MFA) with CleanCo previously (i.e. had a prior Portal account) proceed to ***Step 4***.

- *Step1*
  You will be emailed a message from the CleanCo Retail via Microsoft invitations.
  - *Please also check your spam/junk email folder as this message may route to there.*

- *Step 2*

  Click **Accept invitation** within the Microsoft invitations email. This is to confirm your email address. Then follow the onscreen instructions to set up Microsoft Authenticator.

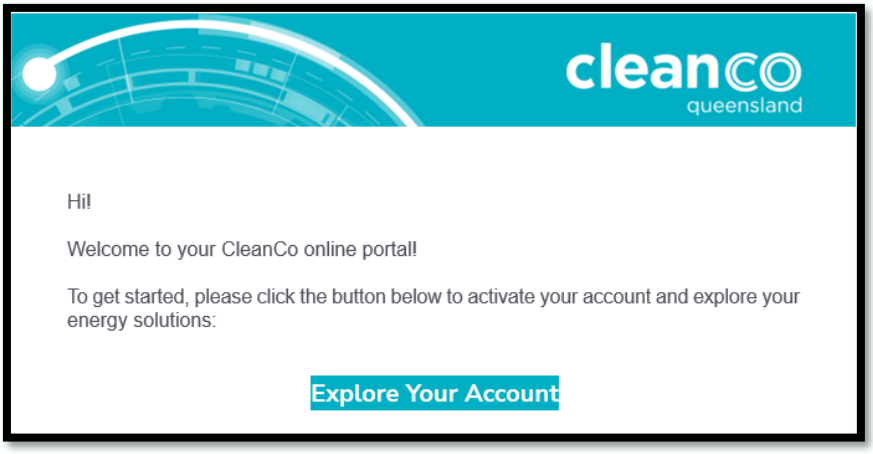
- *Step 3*

  Advise your CleanCo Account Manager or the CleanCo Retail team (retail@cleancoqld.com.au) once you have completed the invitation to set up.

- *Step 4*

  CleanCo Retail will then send you a formal Welcome email. Click the '**Explore Your Account**' button.

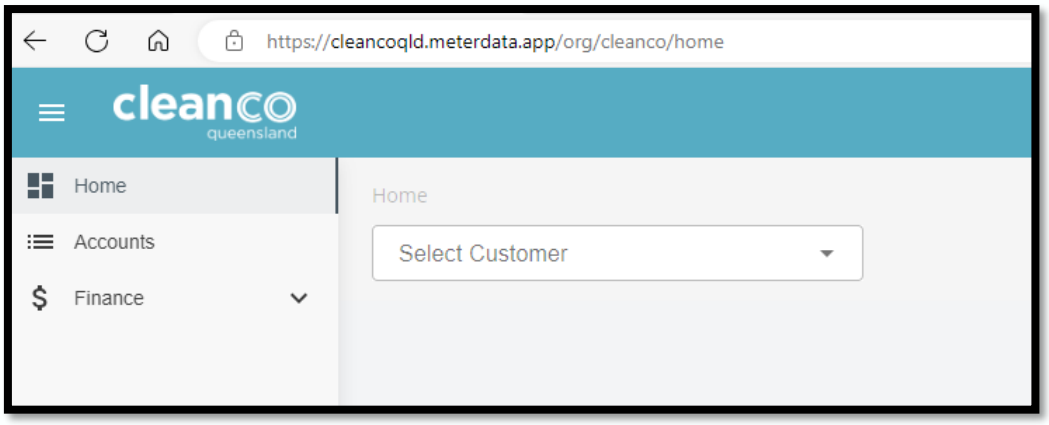
From: CleanCo Retail Team <retail@cleancoqld.com.au>
Subject: CleanCo invited you to access Customer Portal



- *Step 5*

  On the CleanCo Customer Portal page click '**Sign In**' to enter your portal.

- *Step 6*
  Begin using your portal. Note it can take time to initially load this page, as the portal prepares your account data.

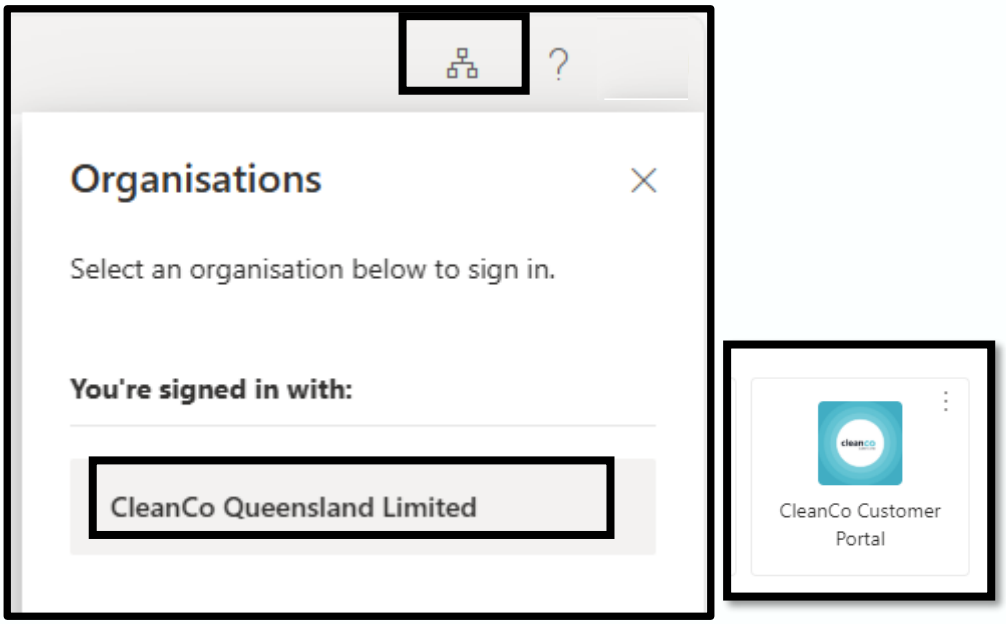


2. CleanCo Portal Navigation Guide

This section is for customer users to help access and navigate around the site and assist use of the common features of your CleanCo Portal.

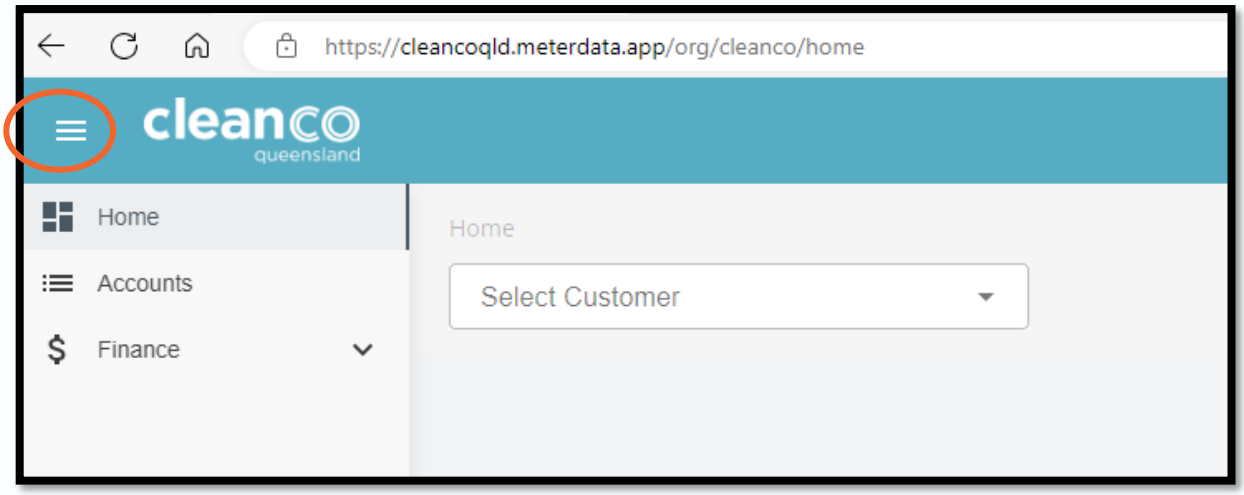
2.1. Accessing the CleanCo Customer Portal

Navigate to your 'My Apps' (https://myapps.microsoft.com/) to find your assigned applications. Ensure the organisation is set to 'CleanCo Queensland Limited' and then Select CleanCo Customer Portal tile.



2.2. Side Menu Bar

Use the menu icon ☰ to show or hide the side menu bar:



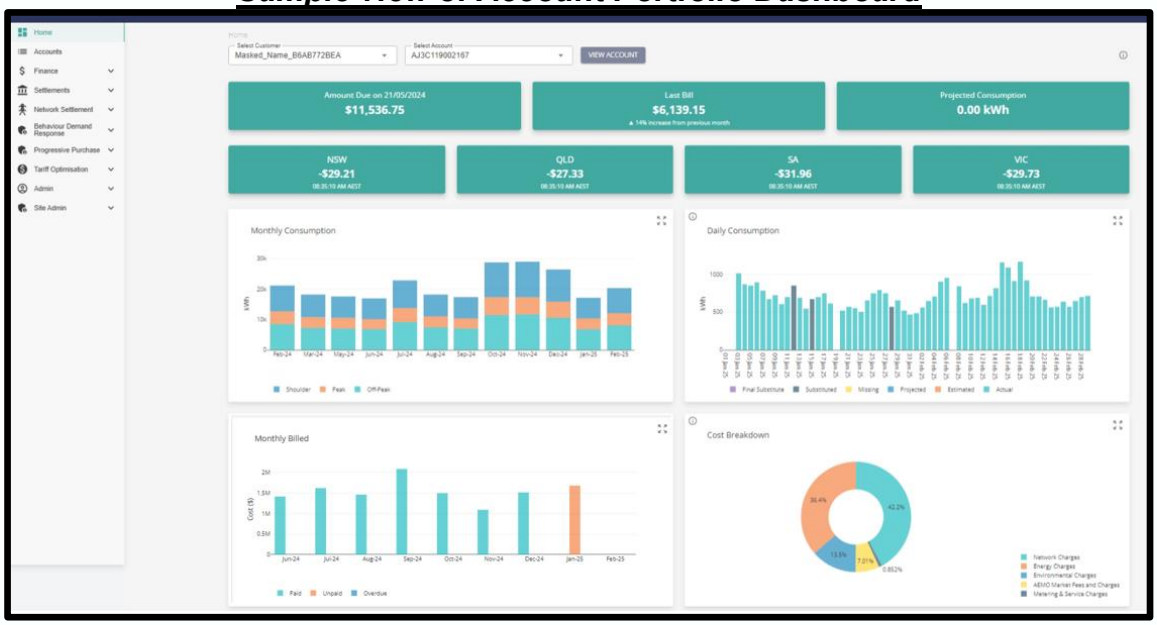
2.3. Home

The **Home** screen will display your **Account Portfolio Dashboard** which includes:

- Amount Due
- Last Bill
- Recent market energy rates across the main NEM states
- Monthly consumption graph (last 12 months)
- Daily Consumption graph (last 12 months)
- Monthly Billed graph (last 12 months)
- Cost Breakdown graph (last 12 months)

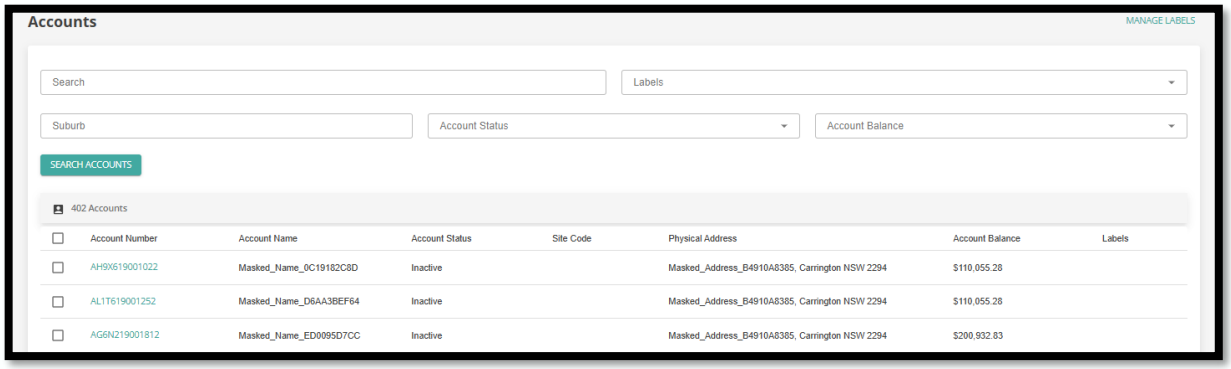
Tip: By hovering the mouse across the graphs specific information will display in tags.

Sample view of Account Portfolio Dashboard



2.4. Accounts

Review the Accounts list or look for account specific information completing the required search criteria:



2.5. Manage Labels

Labels can allow you to group a subset of sites, these are user specific so will not appear in other portal users' views. The main benefit is that this can allow you to quickly find and compare the same subset of sites.

Select **Manage Labels** (top right). Any labels already created will be listed below to view and search.

To create a New Label, click the **New Label** button, top right (image above).

Complete Label Name, Description and select a Label Colour. Click **Create Label** button.

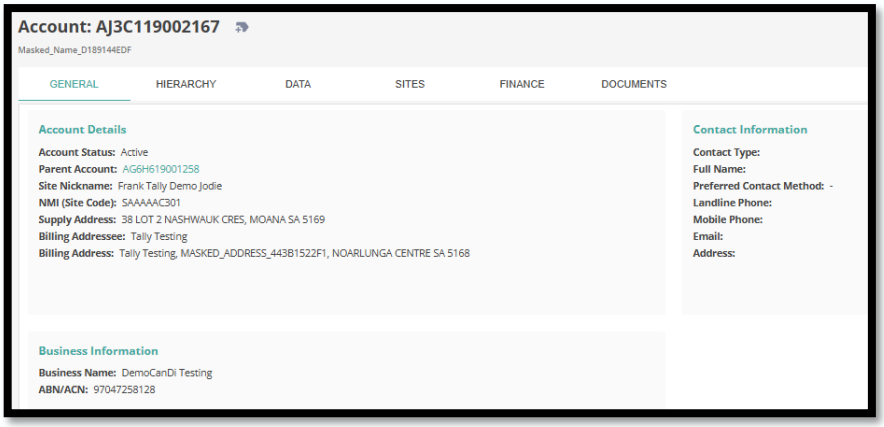
2.6. Account Number

Click on an **Account number** link to get the breakdown of that account. Select headings along the top menu bar to get more specific information:

- General
- Hierarchy
- Data
- Sites

2.6.1. General

Shows relevant Account Details, Contact Information and Business Information for that Account.



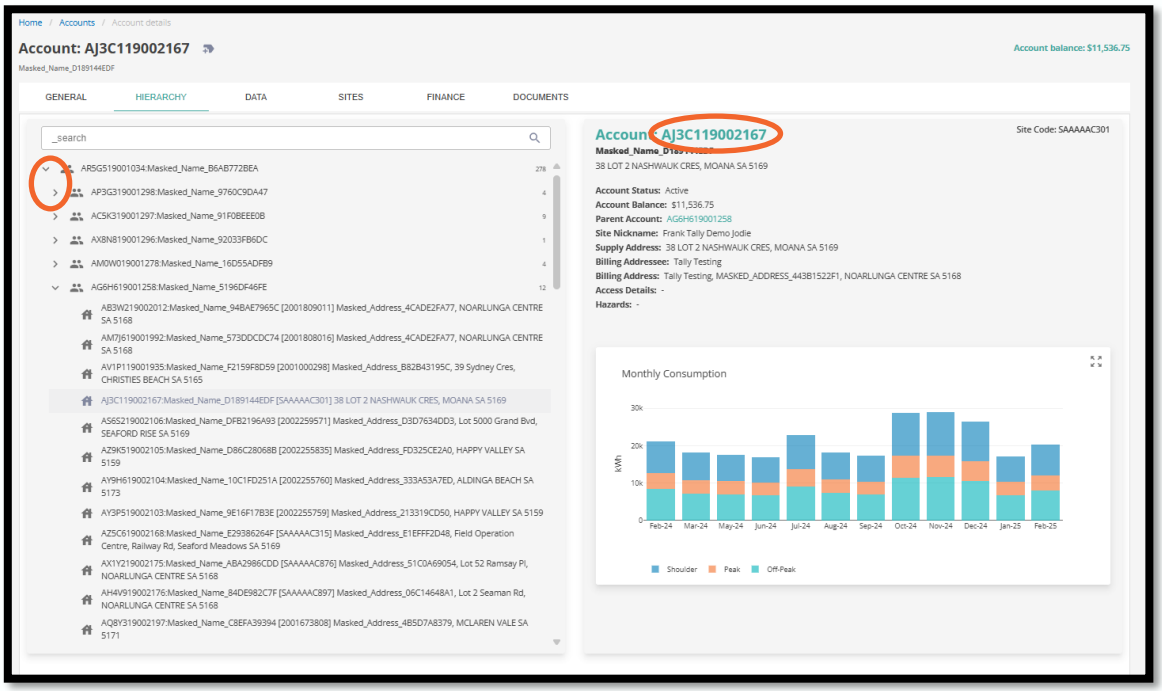
2.6.2. Hierarchy

Displays the parent/ child relationships of your sites/ locations of the account.

Click the arrows to expand or condense the hierarchy on display.

Click on any site or hierarchy level to see specific account info within the right-side window, including a Monthly Consumption graph for that site or group.

To drill through into that individual account further for data downloads etc, you can click on the ***account id link*** at the top left within the right-side window.



2.6.3. Data

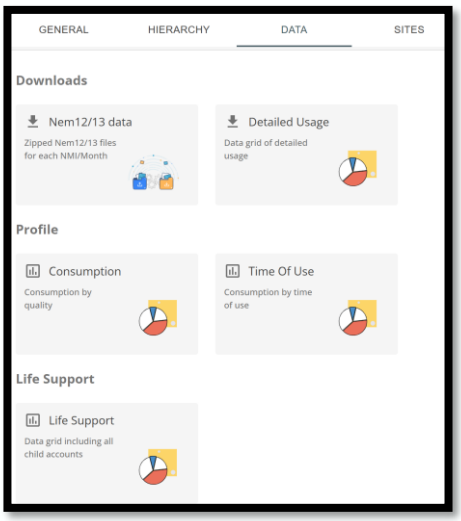
This section is for accessing your energy data downloads and other data visualisations.

2.6.4. Sites

Displays the connections and meters at each site. No data will display unless the account “site” hierarchy level has been selected.

2.7. Data menu

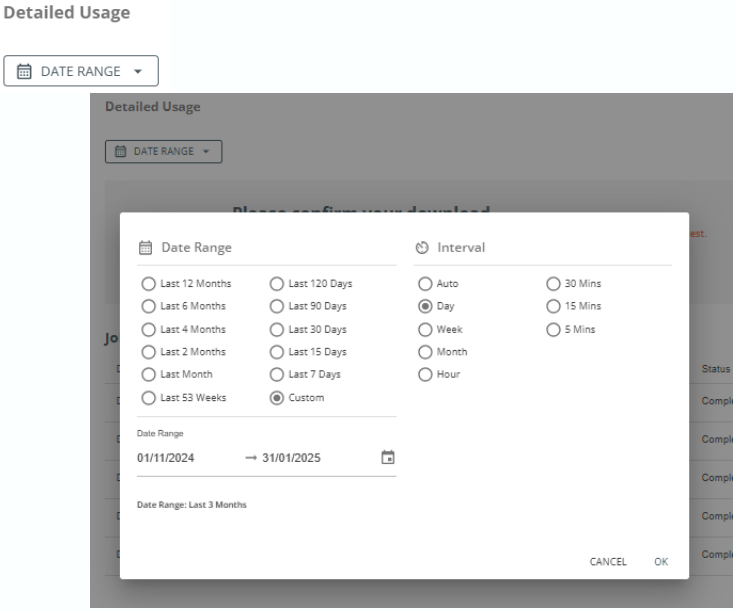
There are currently several download or graphical views available:



1. Downloads
    a. NEM12/13 data: Zipped NEM12/13 files for each NMI/Month
    b. Detailed Usage: Data grid of detailed usage
2. Profile
    a. Consumption: Consumption by quality
    b. Time of Use (if applicable): Consumption view by relevant time of use brackets (Peak, Off Peak etc)
    c. Detailed Demand (site level only): Demand view by relevant time
3. Life Support: Data grid including all child accounts

Download options:

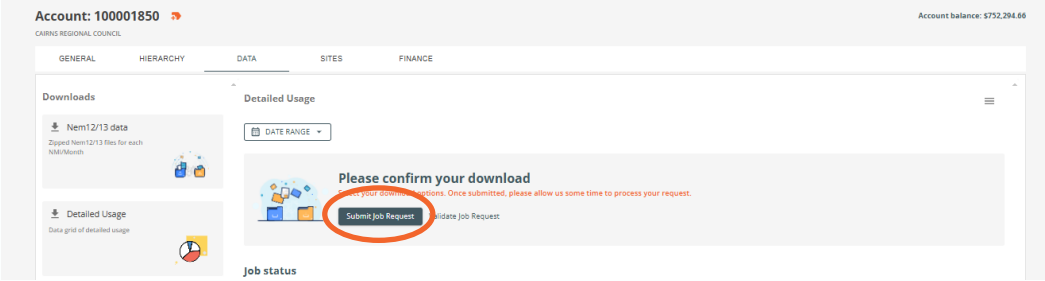
- Select your required date range and the interval type to download:



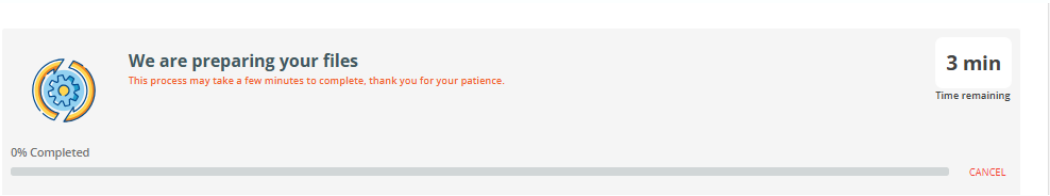
- Aggregate or Non-Aggregate

Prior to running your report you can choose between the option to Aggregate or Non-Aggregate. When Aggregating the current account hierarchy you've selected will be output as a single rolled up output. When selecting Non-Aggregate this will create an itemised batch for all the sites under the current account hierarchy you've selected. At the time of writing there will be an individual output file created for each site using the Non-Aggregate option. *Note feedback has been lodged to consolidate this into a single file where possible.*

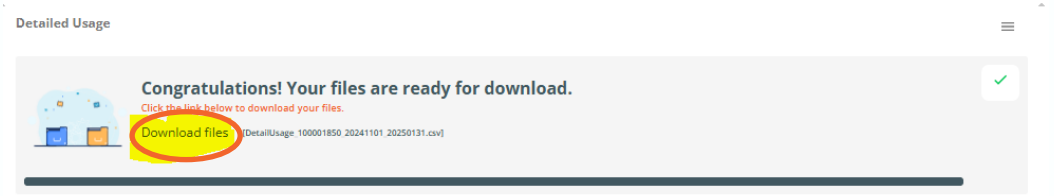
- For Downloads click Submit Job Request button



- The job is prepared. Note it should usually complete well before the time remaining shown:



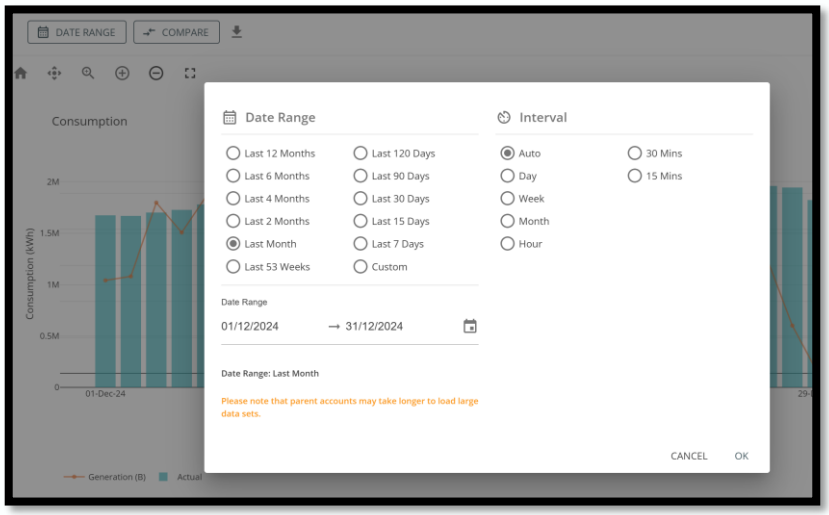
- Click Download files:



- Your data extract file(s) will save to your local download folder.

Profile options:

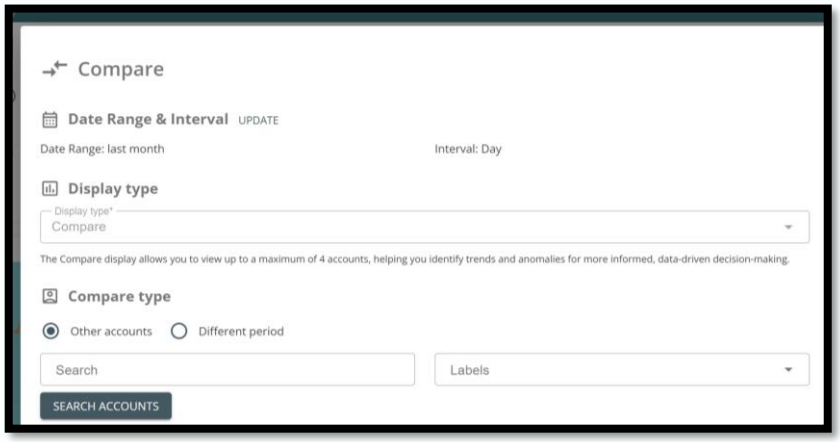
- **Date Range**: Select from several date-based criteria and specific interval level data views.



- **Display Type**
  - **Compare**: Allows for visual comparison between account sites, labels, or date periods. *Tip: currently you can only compare up to four locations.*

  Or

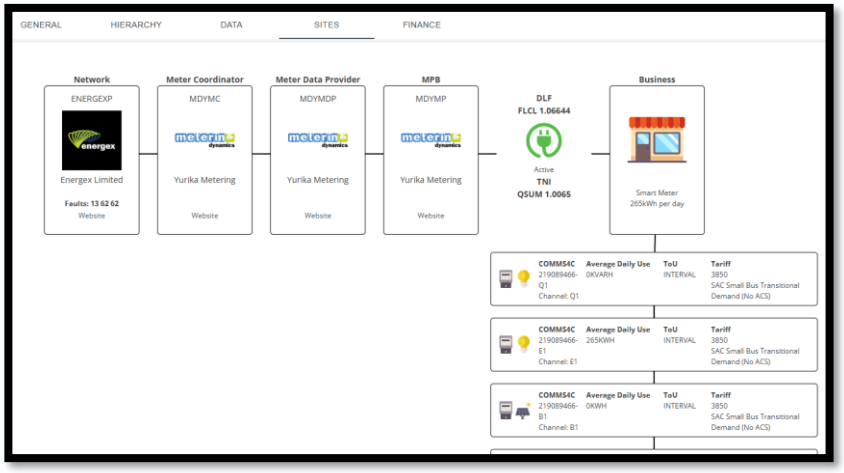
  - **Consolidate**: Allows for the visual to aggregate account sites, labels, or date periods.
- **Clear fields** at the bottom, clears all search parameters.
- **Confirm / Cancel** in the bottom right to proceed or go back.



- **Download CSV** (down arrow): To download the data in CSV format.
- **Home** (house): To download the graph/ image.

2.8. Sites

Displays the connections and meters at account site level.

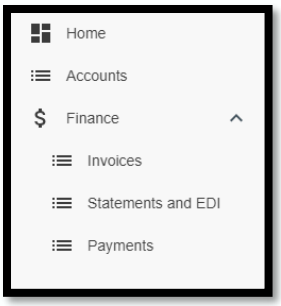


2.9. Finance

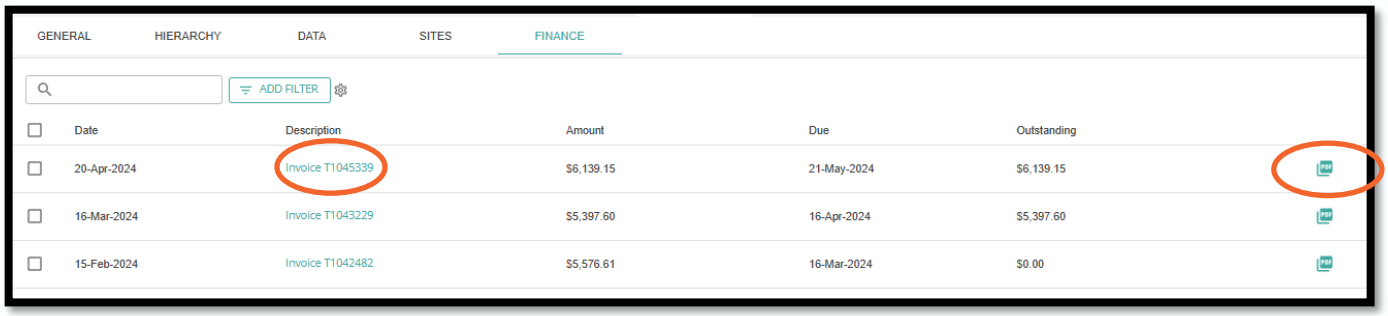
This lists the transactions for that location in a date order, and to assist you further the available invoices can also be filtered as needed.

Click on Finance to get a sub menu:

- Invoices
- Statements and EDI (Electronic Data Interchange)
- Payments



Click on the Invoice description link or the PDF icon to display or download the artefact.



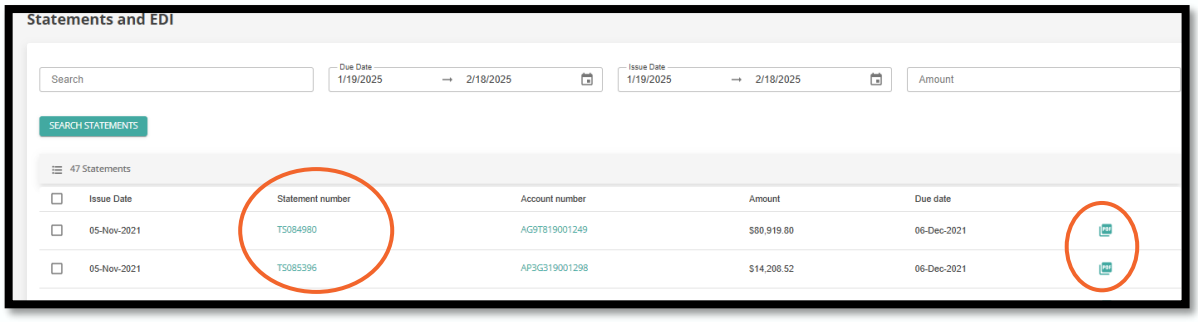
2.10. Invoices

Allows visibility of the invoiced usage and applicable charges.

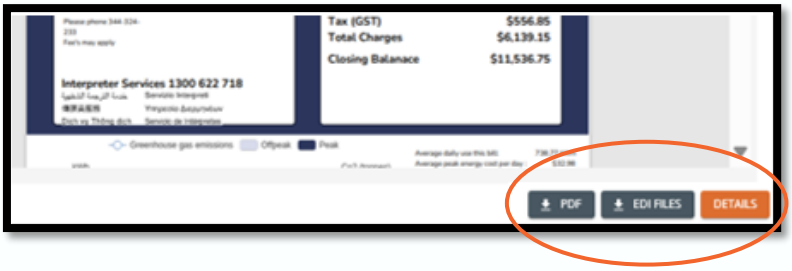
2.11. Statements and EDI

Use search fields to find a specific or type of statement.

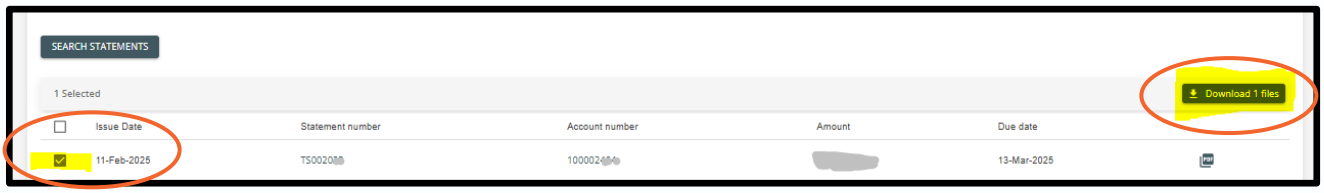
- Click the Statement Number to view the statement.



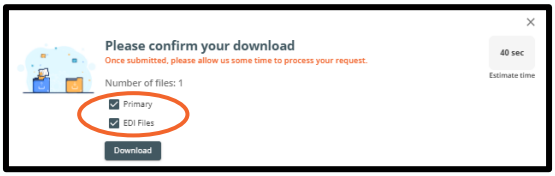
- Click the PDF icon (far right of each row) to select to download the statement in PDF or EDI (csv) File or view Details (bottom of page).



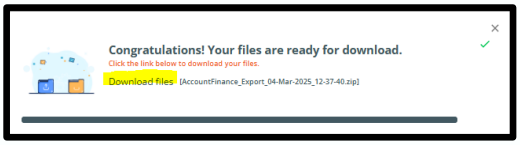
- Alternatively, you can select via check box the statement you wish to view in the left-hand check box, once this is complete a “Download files” button will appear over on the right-hand side.



- Select the downloads you want via check box.



- Click the Download files link to access your pdf statement and/or EDI csv file.



2.12. Payments

- Search, filter, or scroll the list of payments.
- Click on Description to see more details of the Transaction.
- Click Account number to go to the Account Page.

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