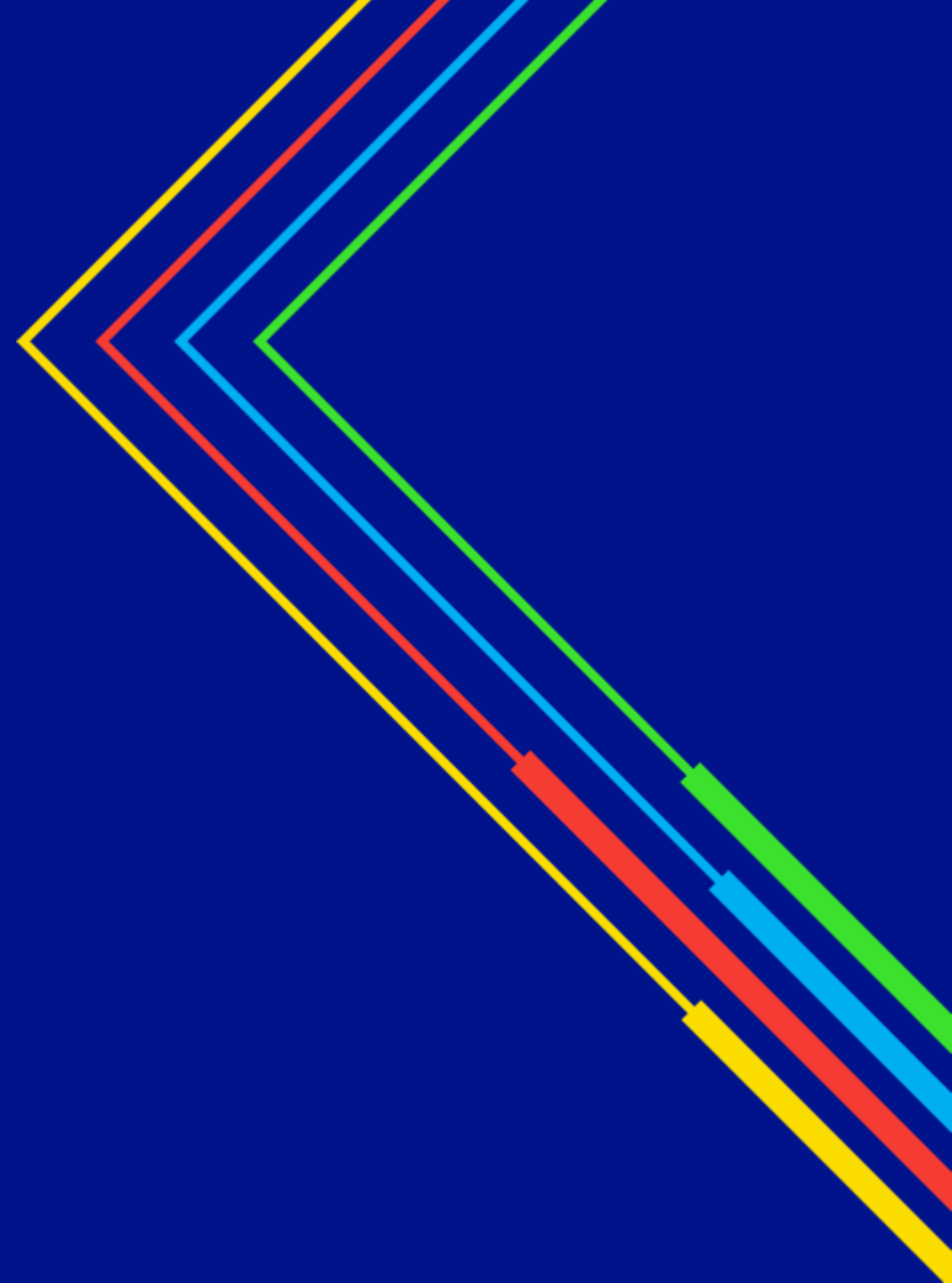


How to Complete a New Company Registration & Manage Users (Part 2)

EV Make-Ready – New York & Massachusetts

November 27, 2023



How to Complete a New Company Registration

HOW TO COMPLETE A NEW COMPANY REGISTRATION



Learning Objectives

This module outlines the steps for completing a new company registration on the Vendor Registration Portal.

The **intended audience** for this module is as follows:

- TRADE PARTNER ADMIN

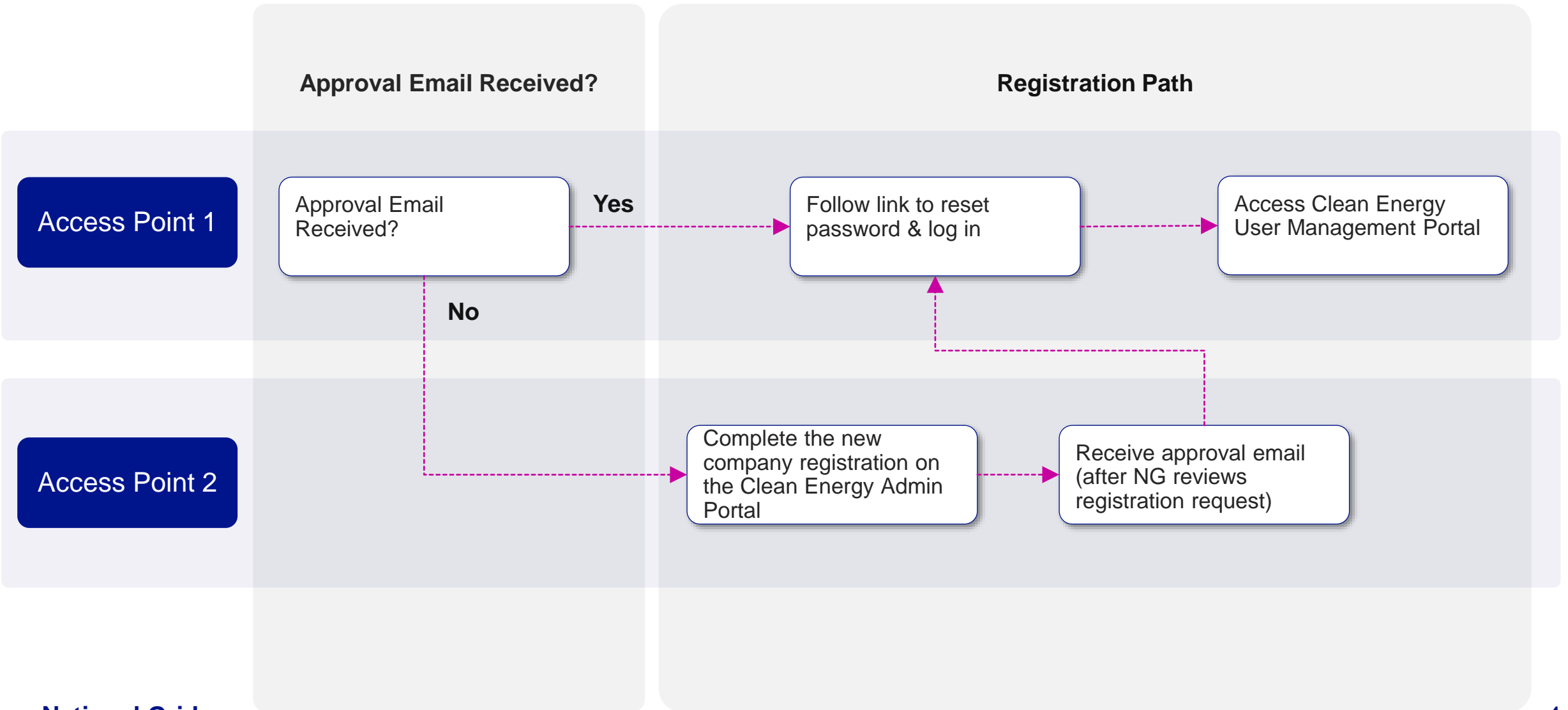
By the end of this module, the user will be able to:

- Manager new users
- Approve / deny new user requests
- Invite employees to register on the portal
- Edit company details

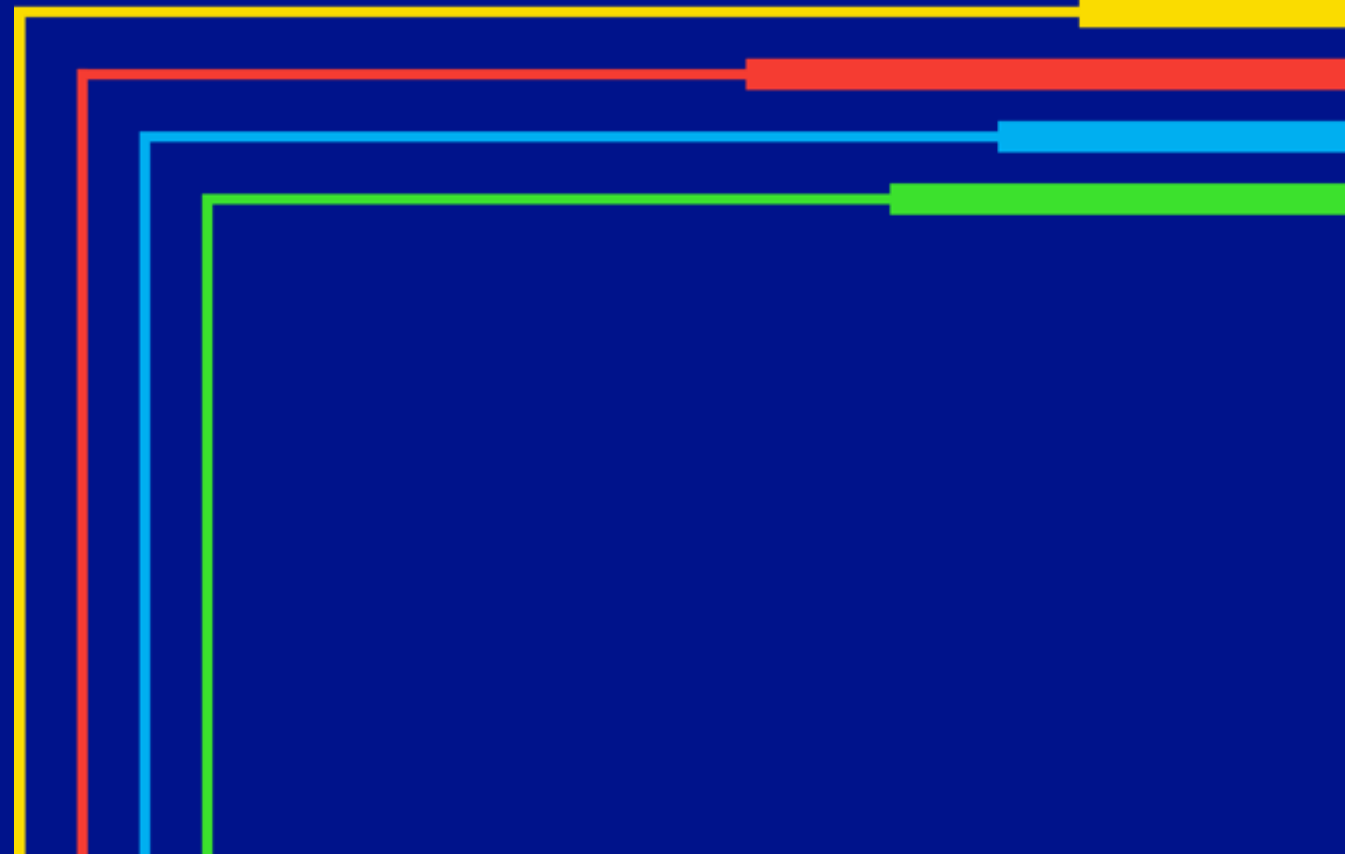
Trade Partner Admin vs. Non-Admin Trade Partner User

Trade Partner Admin	Non-admin Trade Partner User	Permissions / Responsibilities
✓	✓	Create and submit EV Applications on the EV Make-Ready Portal
✓	✓	Access, read, and write private (individually created) EV applications
✓	✓	Ability to save an EV application as a "Draft" and edit/submit it at a later stage
✓	✓	Ability to view all of the EV applications that they have created and submitted
✓	✓	Ability to attach documents to an EV application that they individually submitted
✓	✗	View / edit / attach documents to all company EV Applications, in addition to their own*
✓	✗	Ability to view all submitted company EV applications, in addition to their own (view-only access available once submitted)
✓	✗	Participate in Annual Audit of Trade Partner employee users
✓	✗	Participate in Annual Audit of Necessary Compliance Documents
✓	✗	Approve new Trade Partner Employee requests to access the Clean Energy Application Portal
✓	✗	Access to view & manage a list of all registered Trade Partner Employees within the company
✓	✗	Manage off-boarding of Trade Partner Employees

Portal Access: Trade Partner Admin



Clean Energy User Management Portal: Navigation & Features



Clean Energy 2.0 User Management Portal (cont.)

HOW TO COMPLETE A NEW COMPANY REGISTRATION

Upon accessing the User Management Portal, the left pane will show the following tabs and links:

- A Dashboard:** This will display all recent activities that need the Trade Partner Admin's attention.
- B Manage Team:** This tab will show all users that have already registered or requested registration on the portal.
- C Company Profile:** This tab will show the company details.
- D CE Portal:** This link will be used to create and manage EV applications.
- E** The link for **Help & Support** will be available at the lower-left corner.
- F** Below that, the arrow next to the profile name will provide an option to log out of the portal.

The screenshot shows the Clean Energy 2.0 User Management Portal interface. The left sidebar contains the following navigation items:

- A** Dashboard
- B** Manage Team
- C** Company Profile
- D** CE Portal
- E** Help & Support
- F** Roger (with a dropdown arrow)

The main content area displays the following information:

Clean Energy 2.0 User Management Portal

Welcome Roger

Recent Activity
(1) users need your attention

Name	Role	Email
Max Doe	Non-Admin	maxdoe@...

Dashboard

HOW TO COMPLETE A NEW COMPANY REGISTRATION

The **Dashboard** will show all recent activities that need the Admin's attention. These are registration requests raised by other Non-Admin users in the company.

The screenshot displays the 'Clean Energy 2.0 User Management Portal' dashboard. On the left is a dark blue sidebar with the 'nationalgrid' logo and a menu containing 'Dashboard', 'Manage Team', 'Company Profile', and 'CE Portal'. The 'Dashboard' item is highlighted with a red box. The main content area shows a 'Welcome Roger' message and a 'Recent Activity' section with the note '(1) users need your attention' and a 'View All >' button. Below this is a table with columns for Name, Role, Email, Last Active, and Status. A red box highlights the table content, which shows one entry for 'Max Doe' with the role 'Non-Admin', email 'maxdoe@mailinator.com', and a status of 'UNAPPROVED'.

Name	Role	Email	Last Active	Status
Max Doe	Non-Admin	maxdoe@mailinator.com		UNAPPROVED

Manage Team Tab

HOW TO COMPLETE A NEW COMPANY REGISTRATION

The **Manage Team** tab will show all users that have successfully registered (**ACTIVE**), have requested registration approval (**UNAPPROVED**), or have been denied approval (**REJECTED**).

Clean Energy 2.0 User Management Portal

Manage Team

[Invite Employee](#)

Name	Email	Phone	Last Active	Status
Max Doe	maxdoe@mailinator.com	4445556667		UNAPPROVED
Roger Brown	rogerbrown@mailinator.com	5554443338	1 days (26-09-2023)	ACTIVE
Janet Smith	minakshi.chaudhary@in.ibm.c...	5556667778		ACTIVE

Manage Team Tab

HOW TO COMPLETE A NEW COMPANY REGISTRATION

The Admin can view and manage the other Non-Admin users (also referred to as “Trade Partner Users”) on this tab.

i User details such as **Name**, **Email**, **Phone**, **Last Active** date, and **Status** will be displayed.

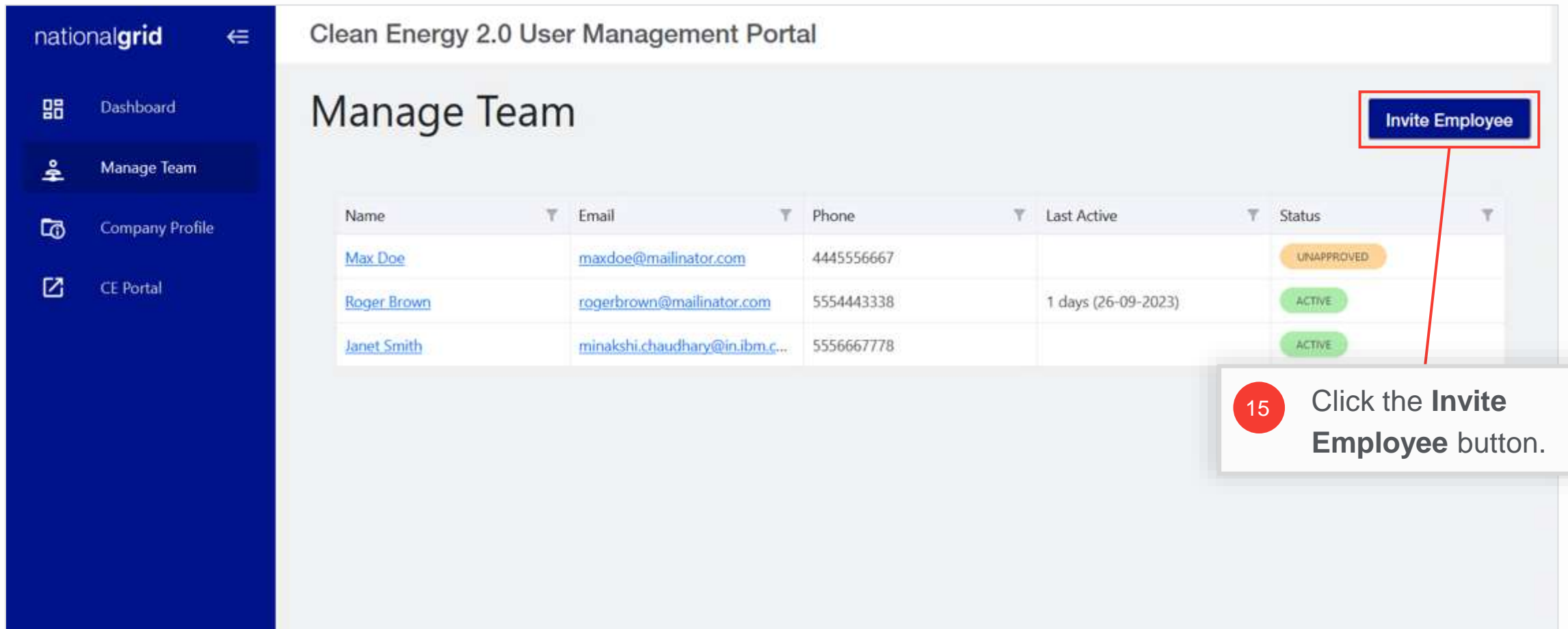
Name	Email	Phone	Last Active	Status
Max Doe	maxdoe@mailinator.com	4445556667		UNAPPROVED
Roger Brown	rogerbrown@mailinator.com	5554443338	1 days (26-09-2023)	ACTIVE
Janet Smith	minakshi.chaudhary@in.ibm.c...	5556667778		ACTIVE

i The Admin can click the **Name** link to view more details of a user.

Invite Employee

HOW TO COMPLETE A NEW COMPANY REGISTRATION

Admins can invite company employees to register on the Vendor Registration Portal.



The screenshot displays the 'Clean Energy 2.0 User Management Portal' interface. On the left is a dark blue sidebar with the 'nationalgrid' logo and a menu containing 'Dashboard', 'Manage Team', 'Company Profile', and 'CE Portal'. The main content area is titled 'Clean Energy 2.0 User Management Portal' and 'Manage Team'. A table lists team members with columns for Name, Email, Phone, Last Active, and Status. A red box highlights the 'Invite Employee' button in the top right corner of the table area. A callout box with the number '15' points to this button, containing the instruction: 'Click the Invite Employee button.'

Name	Email	Phone	Last Active	Status
Max Doe	maxdoe@mailinator.com	4445556667		UNAPPROVED
Roger Brown	rogerbrown@mailinator.com	5554443338	1 days (26-09-2023)	ACTIVE
Janet Smith	minakshi.chaudhary@in.ibm.c...	5556667778		ACTIVE

Invite Employee (cont.)

HOW TO COMPLETE A NEW COMPANY REGISTRATION

The screenshot displays the 'Clean Energy 2.0 User Management Portal' interface. On the left is a dark blue sidebar with the 'nationalgrid' logo and navigation options: Dashboard, Manage Team, Company Profile, CE Portal, Help & Support, and Roger. The main content area is titled 'Clean Energy 2.0 User Management Portal' and 'Manage Team'. A table lists team members with columns for Name, Email, Phone, Last Active, and Status. A blue 'Invite Employee' button is in the top right. A white pop-up window titled 'Invite an Employee' is open, with instructions to enter an email and click 'Invite'. A red box highlights the email input field containing 'jlarsen@mailinator.com', and another red box highlights the 'Invite' button. A callout box with a red circle containing the number '16' provides instructions: 'In the pop-window, enter the Email ID of the employee and then click Invite. Once selected, you will receive a confirmation that says: Invitation Sent!'. A green 'Invitation Sent!' confirmation message is visible at the bottom of the pop-up.

nationalgrid

Clean Energy 2.0 User Management Portal

Manage Team

Invite Employee

Name	Email	Phone	Last Active	Status
Max Doe	maxdoe@mailinator.com	4445556667		UNAPPROVED
Roger Brown	rogerbrown@mailinator.com	5554443338	1 days (26-09-2023)	ACTIVE
Janet Smith	minakshi.chaudhary@in.ibm.c...	5556667778		ACTIVE

Invite an Employee

Enter the employee's email below. They will be sent a link inviting them to register for the new Clean Energy Portal.

Email

Add

Invite

16 In the pop-window, enter the **Email** ID of the employee and then click **Invite**. Once selected, you will receive a confirmation that says:

Invitation Sent!


Invite Employee (cont.)

HOW TO COMPLETE A NEW COMPANY REGISTRATION

The Trade Partner User (non-admin) will receive an email inviting them to register on the Vendor Registration Portal.

To	jlarsen
From	CleanEnergyIncentivePortal@nationalgrid.com
Sending IP	205.220.172.89
Received	2023-08-10 15:29:53

HTML TEXT JSON RAW LINKS SMTP_LOG ATTACHMENTS



Welcome Trade Partner Employee!

Dear jlarsen@mailinator.com,

We invite you to join the National Grid Clean Energy family where you can view, monitor, and apply for Clean Energy programs.

Your company's Clean Energy ID is CE4BVL658EJC

Please follow this link to register:

<https://cust-dev-eus2-ce-app-01.azurewebsites.net/>

For help and support please contact EVNationalGridUNY@nationalgrid.com

Thank you.

National Grid

Review and Approve Employee Registration Request

HOW TO COMPLETE A NEW COMPANY REGISTRATION

Trade Partner Admins can approve / deny the registration requests from other employees.

nationalgrid Clean Energy 2.0 User Management Portal

Manage Team

[Invite Employee](#)

Name	Email	Phone	Last Active	Status
Max Doe	maxdoe@mailinator.com	4445556667		UNAPPROVED
Roger Brown	rogerbrown@mailinator.com	5554443338	1 days (26-09-2023)	ACTIVE
Janet Smith	minakshi.chaudhary@in.ibm.c...	5556667778		ACTIVE

17 To review and approve a registration request, click the **Name** or **Email** link for the request.

i Users can click the email link on the **Dashboard** as well.

Review and Approve Registration Request (cont.)

HOW TO COMPLETE A NEW COMPANY REGISTRATION

nationalgrid Clean Energy 2.0 User Management Portal

User Profile

Team Member

NEW Last Active:

First Name: Max

Last Name: Doe

Email: maxdoe@mailinator.com

Phone Number: 4445556667

Username: maxd_eev

Actions ▾

- Edit Profile
- Approve User**
- Deny User

18 Review the details and then click **Actions**.

19 Select **Approve User** from the drop-down list to approve the request.

Review and Approve Registration Request (cont.)

HOW TO COMPLETE A NEW COMPANY REGISTRATION

The status of the user will change from NEW to **ACTIVE**.

The screenshot displays the 'Clean Energy 2.0 User Management Portal' interface. On the left is a dark blue sidebar with the 'nationalgrid' logo and a back arrow. Below the logo are four menu items: 'Dashboard' (grid icon), 'Manage Team' (person icon), 'Company Profile' (document icon), and 'CE Portal' (portal icon). The main content area is titled 'Clean Energy 2.0 User Management Portal' and contains a 'User Profile' section. At the top of this section is a 'Team Member' label and an 'Actions' dropdown menu. Below this, the user's status is shown as 'ACTIVE' in a green pill, followed by the text 'Last Active:'. The profile details are organized into four input fields: 'First Name' (Max), 'Last Name' (Doe), 'Email' (maxdoe@mailinator.com), and 'Phone Number' (4445556667). A 'Username' field at the bottom contains the value 'maxd_eev'.

Field	Value
First Name	Max
Last Name	Doe
Email	maxdoe@mailinator.com
Phone Number	4445556667
Username	maxd_eev

Approval Email to Trade Partner User

HOW TO COMPLETE A NEW COMPANY REGISTRATION

When the registration request is approved by the Trade Partner Administrator, the Trade Partner User will receive an email indicating the approval of the request and a link to set their password.

Similarly, if the Trade Partner Administrator denies the request, the user will get a rejection email and they will need to resubmit the request after correcting the errors.



Welcome Trade Partner Employee!

Dear Max,

We invite you to join the National Grid Clean Energy family where you can view, monitor, and apply for Clean Energy programs.

To sign in to your account use: maxd_eev

Your company's Clean Energy ID is CE4BVL658EJC

Please follow this link to set your password:

https://testlogincleanenergy.b2clogin.com/testlogincleanenergy.onmicrosoft.com/oauth2/v2.0/authorize?p=B2C_1A_CE_QA_RESETPW&client_id=559f92c...//nationalgridcleanenergy--pfqa1.sandbox.my.site.com/tradepartners&scope=openid&response_type=code&login_hint=maxdoe@mailinator.com&username=

For help and support please contact EVNationalGridUNY@nationalgrid.com

Thank you.

National Grid

Company Profile

HOW TO COMPLETE A NEW COMPANY REGISTRATION

A The **Company Profile** tab will show the company details as provided during the registration of the company.

B The Trade Partner Admin can use the **Edit** button to update the details, if needed.

The screenshot displays the 'Clean Energy 2.0 User Management Portal' for 'Easy EVs Ltd'. The 'Company Profile' section is active, showing the following details:

- Clean Energy ID:** CE4BVL658EJC
- Company Information:**
 - Company Name: Easy EVs Ltd
 - Tax ID: 789567456
 - Email: rogerbrown@mailinator.com
 - Phone Number: 5558884445
- Company Address:**
 - Street Address: 12 Maple Street
 - Building, Suite, etc (optional): ABC Tower
 - City: Boston
 - State / Province: Massachusetts
 - Zip / Postal Code: 02108
 - Country: United States of America
- Mailing Address:**
 - Street Address: [Field]
 - Building, Suite, etc (optional): [Field]

An 'Edit' button is located in the top right corner of the details section, highlighted with a pink box labeled 'B'. The sidebar on the left shows the 'Company Profile' tab selected, highlighted with a green box labeled 'A'.

Company Profile – Programs Subtab

HOW TO COMPLETE A NEW COMPANY REGISTRATION

The **Programs** subtab in the **Company Profile** tab provides the list of programs that the company has registered for.

The screenshot displays the 'Clean Energy 2.0 User Management Portal' for 'Easy EVs Ltd'. The 'Company Profile' section is active, with the 'Programs' subtab selected and highlighted by a red border. A blue button labeled '+ Add Programs' is located in the top right corner of the main content area, highlighted by a pink box. Below the subtab, a message states: 'These are the programs your company participates in. Adding new programs may be subject to approval by a National Grid Program Manager.' Two program entries are listed: 'NEW YORK | ELECTRIC VEHICLES EV Make-Ready Program - New York (NY)' and 'MASSACHUSETTS | ELECTRIC VEHICLES EV Make-Ready Program - Massachusetts (MA)'. A pink callout box with an information icon contains the text: 'The Admin can use the **Add Programs** button to add additional programs.'

Company Profile – Programs Subtab

HOW TO COMPLETE A NEW COMPANY REGISTRATION

The screenshot shows the 'Clean Energy 2.0 User Management Portal' for 'Easy EVs Ltd'. The 'Company Profile' subtab is active, displaying a 'Details' section. A red warning box states: 'Please select atleast one Program'. Below this, a prompt asks: 'Please select the programs you are interested in participating in.' The selection criteria are as follows:

State	Product	Segment
<input type="checkbox"/> NY Jurisdiction (NY)	<input checked="" type="checkbox"/> Electric Vehicle (EV)	<input checked="" type="checkbox"/> Commercial
<input type="checkbox"/> MA Jurisdiction (MA)	<input type="checkbox"/> Energy Efficiency (EE)	<input type="checkbox"/> Residential

Two programs are listed and selected (indicated by a checkmark in a box):

- NEW YORK | ELECTRIC VEHICLES
EV Make-Ready Program - New York (NY)
- MASSACHUSETTS | ELECTRIC VEHICLES
EV Make-Ready Program - Massachusetts (MA)

Each program has a 'Learn More' link. At the bottom, there are 'Cancel' and 'Request' buttons, with the 'Request' button highlighted.

i On clicking the **Add Programs** button, a list of all available programs will appear. The Admin can select any program in which the company wants to participate and click the **Request** button. The selected program will appear in the list of programs after National Grid approves it.

In this example, the company is already participating in the two available EV programs. There are no additional programs to select.

Company Profile – Programs Subtab

HOW TO COMPLETE A NEW COMPANY REGISTRATION

nationalgrid ←

Dashboard
Manage Team
Company Profile
CE Portal

Clean Energy 2.0 User Management Portal

Easy EVs Ltd

Company Profile

+ Add Programs

Details **Programs** Administrator

These are the programs your company participates in. Adding new programs may be subject to approval by a National Grid Program Manager.

NEW YORK ELECTRIC VEHICLES EV Make-Ready Program - New York (NY)	Approved
MASSACHUSETTS ELECTRIC VEHICLES EV Make-Ready Program - Massachusetts (MA)	Approved

i To update the existing program information, select the **Help & Support** button to email CleanEnergyIncentivePortal@nationalgrid.com with the request details.

Help & Support

Company Profile – Administrator Subtab

HOW TO COMPLETE A NEW COMPANY REGISTRATION

The **Administrator** subtab within the **Company Profile** tab shows the user details of the Trade Partner Admin.

The screenshot displays the 'Clean Energy 2.0 User Management Portal' interface. On the left is a dark blue sidebar with the 'nationalgrid' logo and navigation options: 'Dashboard', 'Manage Team', 'Company Profile' (highlighted), and 'CE Portal'. The main content area shows the 'Easy EVs Ltd' 'Company Profile' with three subtabs: 'Details', 'Programs', and 'Administrator' (highlighted with a red box). Below the subtabs is a table with columns: Name, Email, Programs, Last Active, and Status. The table contains one row for 'Roger Brown' with email 'rogerbrown@mailinator.com', associated with 'EV Make-Ready Program - New York' and 'EV Make-Ready Program - Massachusetts', last active '1 days (08-09-2023)', and status 'Active'.

Name	Email	Programs	Last Active	Status
Roger Brown	rogerbrown@mailinator.com	EV Make-Ready Program - New York EV Make-Ready Program - Massachusetts	1 days (08-09-2023)	Active

End of Procedure