



# Efficiency Navigator Guide – Trade Ally – How to Register as a Trade Ally



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# How to Register as a Trade Ally

Trade allies are contractors identified in the market that either have or have not participated in programs in the past. The process of becoming a “registered” trade ally usually consists of meeting with a program representative for an explanation of the program and other key points they want to convey to their trade ally network. Contractors usually have to sign a trade ally registration as well, which includes agreeing to certain terms and conditions. Some programs require trade allies to be registered before they submit projects – while others do not.

This document outlines the Efficiency Navigator process for becoming a registered trade ally. The exact process and how Efficiency Navigator will be integrated will depend on the program.

Any questions not answered by this document can be answered by either visiting the [Help](#) page within the Efficiency Navigator trade ally portal or by calling 855-752-7323.

## 1.0 Register as a New User

**There is a lot of user guidance provided within Efficiency Navigator – it is very important that you read all introductions, step instructions, etc.**

1. Create a Trade Ally account in [Efficiency Navigator](#).
  - a. Click “Register as a new user”


Log In

---

Email

Password

Remember me?



- b. Fill out all of the required fields and click “Register”

## Register

Fill out your account information below.

### User Information

**First name \***   
**Last name \***   
**Password \***   
**Confirm password \***   
**Email \***   
**Security question**   
**Answer \***

←

- You will be redirected to the following notification screen.

## Confirmation Email Sent

Please check the inbox of the email address you provided to confirm your account registration. If you do not see an email in your email inbox, please check your Junk Mail folder.

- You should receive an auto generated email welcoming you to Efficiency Navigator. (If there is no email in your inbox, check your spam folder.) This email will contain a link to verify your email address; click the link to verify your email address.

### Welcome to Efficiency Navigator

x



**support@efficiencynavigator.com**

to me ▾

Welcome! Thank you for setting up your Efficiency Navigator account. Please use the link below to verify your account information.

Your user name will be the email address you submitted to receive your confirmation email.

Url: [Verify Your Account](#) ←

If you have any issues accessing the site contact us via the help link at the top of the page.

- You will be redirected to an account confirmation page. Click "Log In".

## Account Confirmed

Thank you for confirming your account.

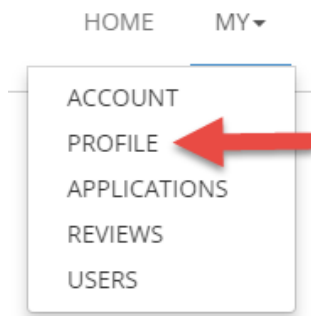
←

5. Enter your email and password and click “Log In”

### Log In

## 2.0 Profile Management

6. “Account Setup” will be the landing page upon your initial log in. This can also be found in “MY” > “PROFILE” in the main menu.
  - a. To go back to a previous tab on the “Profile Management” page, use the “Back” button at the bottom of the tabs or click on the name of the tab. Using the back arrow in the browser will log you out and discard any unsaved changes.



### Initial Setup

7. Enter the Tax ID of your business, then click “Continue to Step 2 of 4”.

## Business Information

8. At a minimum, fill out all of the required fields under the "Business" tab. Fill out business information as required by the program.

Step 2: Business
Step 3: Locations
Step 4: Uploads

### Business Information

The information you provide will match you with participating utilities, including full access to their program benefits.

|                                                |                      |
|------------------------------------------------|----------------------|
| Business Name *                                | DBA (If Applicable)  |
| <input type="text" value="Franklin Business"/> | <input type="text"/> |
| License Number                                 | Number of employees  |
| <input type="text"/>                           | <input type="text"/> |

### Insurance Information

|                           |                           |
|---------------------------|---------------------------|
| Liability insurance limit | Insurance Expiration Date |
| <input type="text"/>      | <input type="text"/>      |

### Tax Information

Tax Status \*

- Corporation
- Tax Exempt
- Individual
- Other, please specify

### Training Information

|                             |                                         |
|-----------------------------|-----------------------------------------|
| Training Certificate Number | Training Date                           |
| <input type="text"/>        | <input type="text" value="MM/DD/YYYY"/> |

### Other Information

Check all that apply

- Member of union
- Minority owned business
- Women owned business
- Veteran owned business

### Terms and Conditions

[Terms and Conditions](#)

I have read and agree with all the terms and conditions set forth in the Terms and Conditions document \*

Continue To Step 3 of 4
←

## Location Information

9. At a minimum, fill out all of the required fields for your business "Location". Fill out location information as required by the program.

### Location Information

If you only have one location, simply enter your main site information below and select 'Save Location,' before continuing to the next screen. For multiple locations, please enter and save each service site separately. This information will allow customers to see the distance to each location and proper/relevant/applicable contact information.

Complete this information for each of your business' locations

Add a new location ▼

Location Name \*

Franklin Business

Location Options

- This is the primary location for the company (only one location can be primary)
- Exclude this location from 'Find a Contractor' searches

Street Address 1 \*

102 Franklin Dr.

Street Address 2

ZIP Code \*

53188

#### Contact information

Business email \*

franklinemail@email.com

Business phone

(555) 370-2666

Contact Name \*

Ben Franklin

Contact email \*

bfranklin@email.com

Contact phone \*

(555) 370-2666

Web Site URL

franklinbusiness.com

Brief description of your company. (Displays in search listing.) \*

Company description.

[130 more characters are allowed](#)

Detail description of your company. (Displays on your profile page.) \*

Detailed description of company.

### Select Service Area

10. Select the "Service area" for this business location.
  - a. Use the state, county, and zip code drop-down menus to select the area(s) this location will service.
    - i. If this location services an entire state, there is no need to select counties and zip codes.
    - ii. If this location services select counties within the state, then select the state, select a county within that state and click "+Add County to Service Area".
      - \*Zip codes only need to be added if the location does NOT service the entire county. Then you will need to add the exact zip codes this location services.

**\*\*WARNING: "-Clear all areas" button will clear ALL state, county, and zip codes that have been added.**

- Some of the information entered in on the “Locations” tab will be seen by customers when searching for a contractor in the Efficiency Navigator customer portal. Some of the information entered in this tab will enable customers to be able to search for you in the Efficiency Navigator customer portal. For additional information about setting up your location information for the Find a Contractor feature, see [Efficiency Navigator - Setting Up The Find a Contractor Feature](#)

Service area

(Select one or more)

Use the drop down options below to enter the ZIP code areas you service. Customers can search for service providers by their ZIP code. You can add multiple ZIP codes at a time by selecting 'Add ZIP Codes' after selecting your state. Once you are satisfied with your service territory select 'Save Location' to update (add?) this location.

Select state: Wisconsin

Select county: Waukesha (Added)

Select ZIP code: select a zipcode

Added Counties

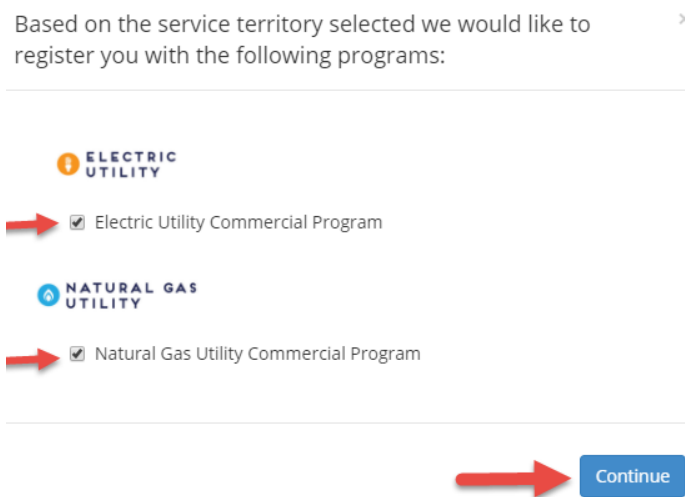
- Milwaukee, WI
- Waukesha, WI

- When finished, click the “+ Save Location” button at the bottom of the page.

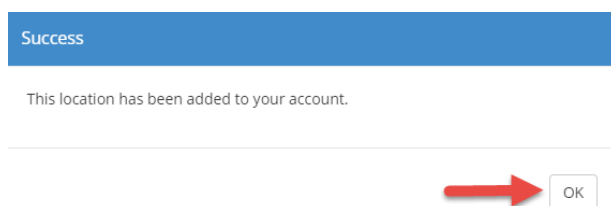


- A pop-up will display the programs you are eligible to participate in based off of the service area for your business. Use the checkboxes to select the programs your business would like to participate in then click “Continue”.

Note: This is a request to participate in the program; this will require approval from the Program Manager.



- You will receive the following success message, click “OK”.

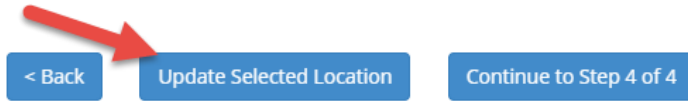




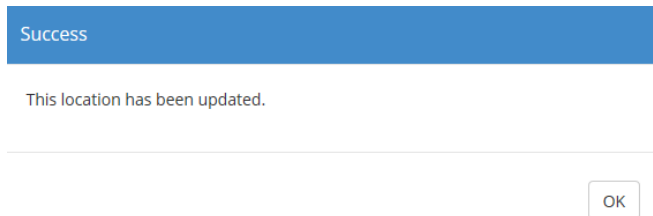
## Update an Existing Location

15. Update an existing location by clicking "Update Selected Location" bottom of the "Locations" tab. Make any needed modifications.

16. When finished, click the "Update Selected Location" button at the bottom of the page.

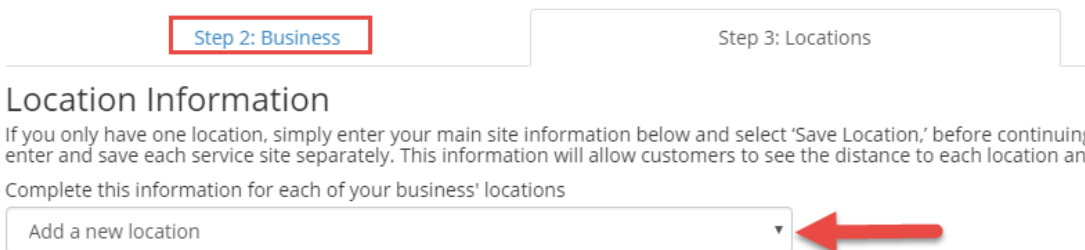


17. You will get the following message, click "OK":



## Add an Additional Location

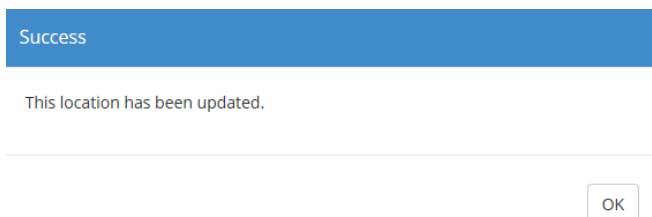
18. Add an additional location by selecting "Add a new location" from the location dropdown at the top of the "Locations" tab. Fill out all of the required fields; follow steps 9 through 13.



19. When finished, click the "+ Save Location" button at the bottom of the page.



20. You will get the following message, click "OK":



21. After all business locations have been added and **SAVED**, click “Continue to Step 4 of 4”.
  - a. If you do not click “+Save Location” before clicking “Continue”, all information for that location will be lost.



22. You will get a pop-up confirming the programs you have requested to participate in, click “OK”

Based on the service territory selected we would like to register you with the following programs: ×

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**ELECTRIC UTILITY**

Electric Utility Commercial Program

**NATURAL GAS UTILITY**

Natural Gas Utility Commercial Program

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## Uploads

23. Upload a certificate of insurance and/or a location image if required by your program. However, if no location image is uploaded, customers will not see an image when searching for a contractor in the Efficiency Navigator customer portal)

**24. Click “Finish Account Setup”**

## Uploads

Use the upload documents functions below to submit required documents and submit a location image. The location image will show in the 'Find a Contractor' tool on the customer facing Efficiency Navigator portal. Typically, contractors upload their logo to represent their locations. For optimal image quality, upload a PNG file under 2MB.

### Business

|                                                                                                 |                                                            |
|-------------------------------------------------------------------------------------------------|------------------------------------------------------------|
| Upload your certificate of insurance                                                            | Uploaded File                                              |
| <input type="button" value="Upload"/> Or <input type="text" value="Select previous insurance"/> | InsuranceCertificate_20151214-033931-253_Chrysanthemum.jpg |

### Locations

|                                          |                                                 |
|------------------------------------------|-------------------------------------------------|
| Upload your location image               | LocationPicture_10077_20160407_033850_10136.png |
| <input type="text" value="My Location"/> |                                                 |
| <input type="button" value="Upload"/>    |                                                 |

25. You will get the following message, click "OK":

**Success**

Thanks for enrolling in the Efficiency Navigator website. We have received your registration will be reviewing it within 3-5 business days. Once approved, you will have full rights to the site and be able submit applications, track status, and have your company profile appear in the 'Find a Contractor' search option for customers.

## Application Approval

26. At this point, there will be an internal process conducted by the program. Program staff will contact you directly if further information is needed. You will be notified when and if there is a status change in regards to your application. Please keep in mind that right now you do not have any functional capabilities within Efficiency Navigator. All functionality is dependent on your trade ally registration application being approved by the program.

### Account Not Yet Approved

Unfortunately, your account has not been approved. Upon completing Account Setup, your information will be reviewed within 3-5 business days. Once approved you will have full rights to the site and be able to submit applications, track status, and have your company profile appear in the 'Find a Contractor' search option for customers. Until then, you do not have access to 'Find a Rebate'.

