Alliant Energy
200 First Street SE
P.O. Box 351
Cedar Rapids, IA 52406-0351

1-800-ALLIANT (800-255-4268)
alliantenergy.com

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Dear Dealer Network member,

Thank you for participating in Alliant Energy's Dealer program and supporting energy efficiency. You play a vital role in helping our customers save energy.

We are excited to offer a new benefit to our Dealers – Efficiency Navigator.

The Efficiency Navigator allows you to personalize and update your company profile on the Dealer Locator. Through Efficiency Navigator, you now have the ability to:

- Define the service areas you support
- Choose the services and technologies your business offers
- Add your company logo and with a message about your company
- Upload insurance certificates

All of these features are designed to help you promote your business through our enhanced Dealer Locator.

Within this packet are instructions on how to use these self-service options. If you have any questions, please contact the Dealer Network by calling (319) 237-3856.

We look forward to working with you this year and helping customers discover the power of energy efficiency!

Sincerely,

Scott Arnold
Trade Account Manager
Phone: (641) 437-5221

Hilleri Steinbrecher
Outreach Lead
Phone: (319) 237-3856

Efficiency Navigator Guide –

Trade Ally – Become the manager of an existing account and profile

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How to register as a Trade Ally

Trade allies are contractors who are eligible to participate in programs. 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 about it. Contractors usually have to sign a trade ally agreement as well. 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 depends on the program.

Any questions not answered within 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

It is 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?

[Log in]

➡ [Register as a new user] [Forgot your password]

   b. Fill out all of the required fields and click "Register"

Register
Fill out your account information below.

User Information

First name *	Mayra
Last name *	Martinez
Password *	········
Confirm password *	········
Email *	rock.mayra34@gmail.com
Security question	What was the name of your first pet? ▾
Answer *	Tom ❶

[Register] ⬅

2. 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.

3. You should receive an 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 it.

Welcome to Efficiency Navigator ☐ Inbox 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.

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

Account Confirmed

Thank you for confirming your account.

⬅ | Log in | | Return to the previous page |

5. Enter your email and password and click "Log In."

Log In

| **Email** | franknavtest@gmail.com |
| **Password** | •••••••••• |

☐ Remember me?

| Log in | ⬅

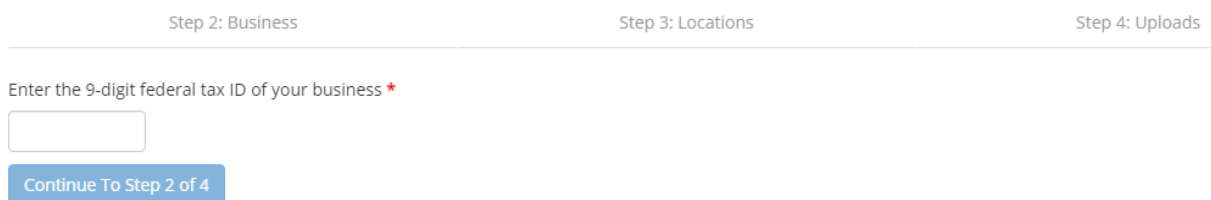| Register as a new user | | Forgot your password |

2.0 Become the manager of your account and profile

1. When logging into the portal for the first time, you will be directed to the Profile Management page. Enter your 9-digit tax ID and click "Continue to Step 2 of 4."

Profile Management

Welcome! You're on your way to managing your free account anytime, anywhere. Simply, fill out the information in the tabs below to access online applications, check project statuses and customize your featured profile within our 'Find a Contractor' tool for customer users. You will also find details on how to become a registered Trade Ally with programs currently available on Efficiency Navigator.

Upon completing the following tabs your information will be reviewed 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.

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

Enter the 9-digit federal tax ID of your business *

Continue To Step 2 of 4

2. After entering your Tax ID, and if the information matches with that in our database, you will be given the option to "Become the manager of this account." Click the button as seen below.

Profile Management

Welcome! You're on your way to managing your free account anytime, anywhere. Simply, fill out the information in the tabs below to access online applications, check project statuses and customize your featured profile within our 'Find a Contractor' tool for customer users. You will also find details on how to become a registered Trade Ally with programs currently available on Efficiency Navigator.

Upon completing the following tabs your information will be reviewed 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.

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

Enter the 9-digit federal tax ID of your business *   This Tax ID is already in use.

888888888   Become the manager of the account

Continue To Step 2 of 4

3. Once you have become the manager of the account, you will be able to modify your account and profile information. Your profile is what prospective customers will see when searching for a contractor using the Find a Trade Ally feature in Efficiency Navigator.

3.0 Account management

1. "Account Setup" will be the landing page upon your initial log in. This can also be found in "MY ACCOUNT" in the main menu.

(NOTE: To go back to a previous tab on the "Account Setup" 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.)
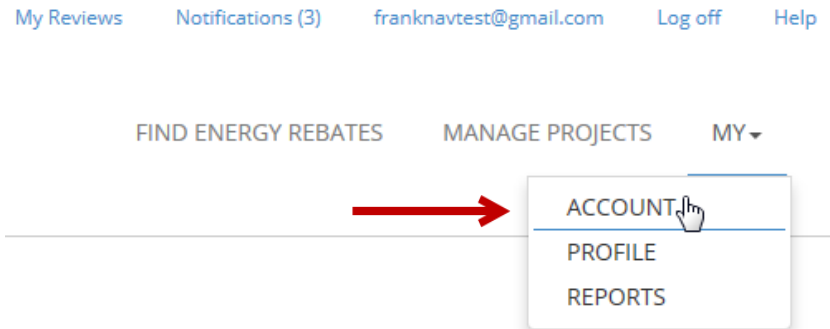
Business information

2. If needed, modify fields under the "Business" tab. Fill out business information as required by your 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 *

My Business

DBA (If Applicable)

License Number

123456789

Number of employees

400

Insurance Information

Liability insurance limit

$ 100,000.00

Insurance Expiration Date

01/01/2018

Tax Information

Tax Status *

◉ Corporation
○ Tax Exempt
○ Individual
○ Other, please specify

Tax ID *

421399047

Training Information

Training Certificate Number

123456789

Training Date

06/01/2017

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

3. If needed, modify "Location" fields for your business. Fill out location information as required by your program.

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

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 *

My Location

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 *   Street Address 2

123 Franklin Street

ZIP Code *

53151

Contact information

Business email *   Business phone

business@gmail.com   (556) 565-6565

Contact Name *   Contact email *   Contact phone *

Harrison Fegley   location@gmail.com   (265) 265-6565

Web Site URL

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

This is a brief description of your company.

106 more characters are allowed

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

This is a detailed description of your company. Both the brief description and the detailed description will be displayed on the customer portal of Efficiency Navigator when a customer is searching for a contractor.

284 more characters are allowed

Service Sectors *
(Select one or more)

☑ Residential
☑ Commercial
☑ Multi-Family Property
☑ Industrial
☑ Schools & Government
☑ Agriculture

Technologies Supported *
(Select one or more)

☑ Heating
☑ Cooling
☑ Lighting
☑ Motors/VFD
☑ Other
☑ Refrigeration
☑ Insulation/Weatherization
☑ Commercial Food Service
☑ Commercial Refrigeration
☑ Geothermal
☑ Manufct/Dstrb/Whlesr
☑ Recycling
☑ Solar
☑ Wind
☑ Plumbing

Services Offered *
(Select one or more)

☑ Design
☑ Efficiency Consulting
☑ Engineering
☑ Equipment Installaion
☑ Equipment Sales
☑ HERS Rater
☑ New Construction
☑ Weatherization Assistance

Select Service Area

4. If applicable, modify the "Service Area" for your business location.
   a. Use the state, county and ZIP code drop-down menus to select the area(s) your business location will service.
      i. If your company services an entire state, there is no need to select counties and zip codes.
      ii. If your company 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.

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

5. Some of the information entered in 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	Select county	Select ZIP code
Wisconsin	Waukesha (Added)	select a zipcode

+ Add County to Service Area   **– Clear all areas**

Added Counties
- Milwaukee, WI   • Waukesha, WI

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

< Back   **+ Save Location**   **Continue to Step 4 of 4**
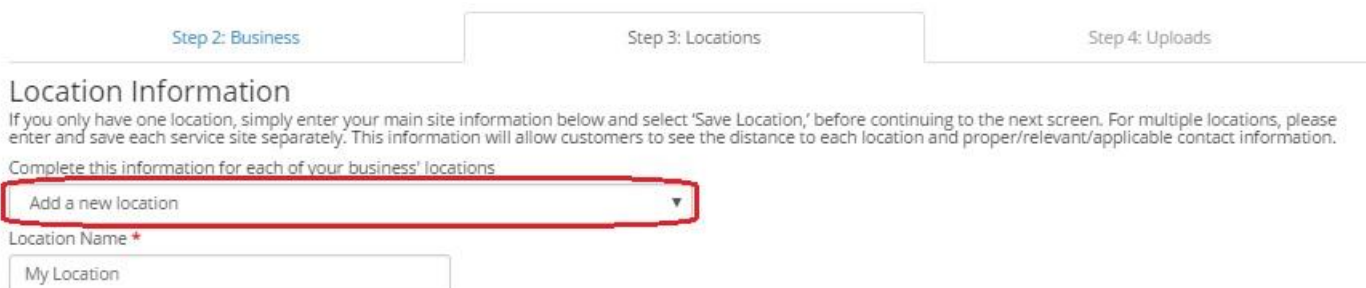
7. You will get the following message:

Success

This location has been updated.

OK

   a. Click "OK"

Update an existing location

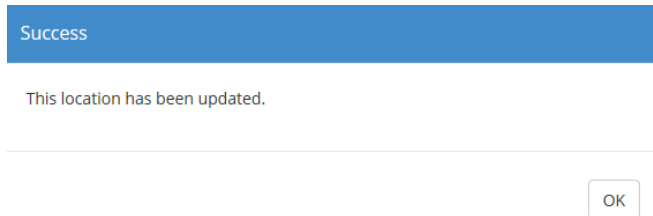8. Update existing information by selecting the dropdown menu at the top of the "Locations" tab.

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

10. You will get the following message:

   a. Click "Ok"
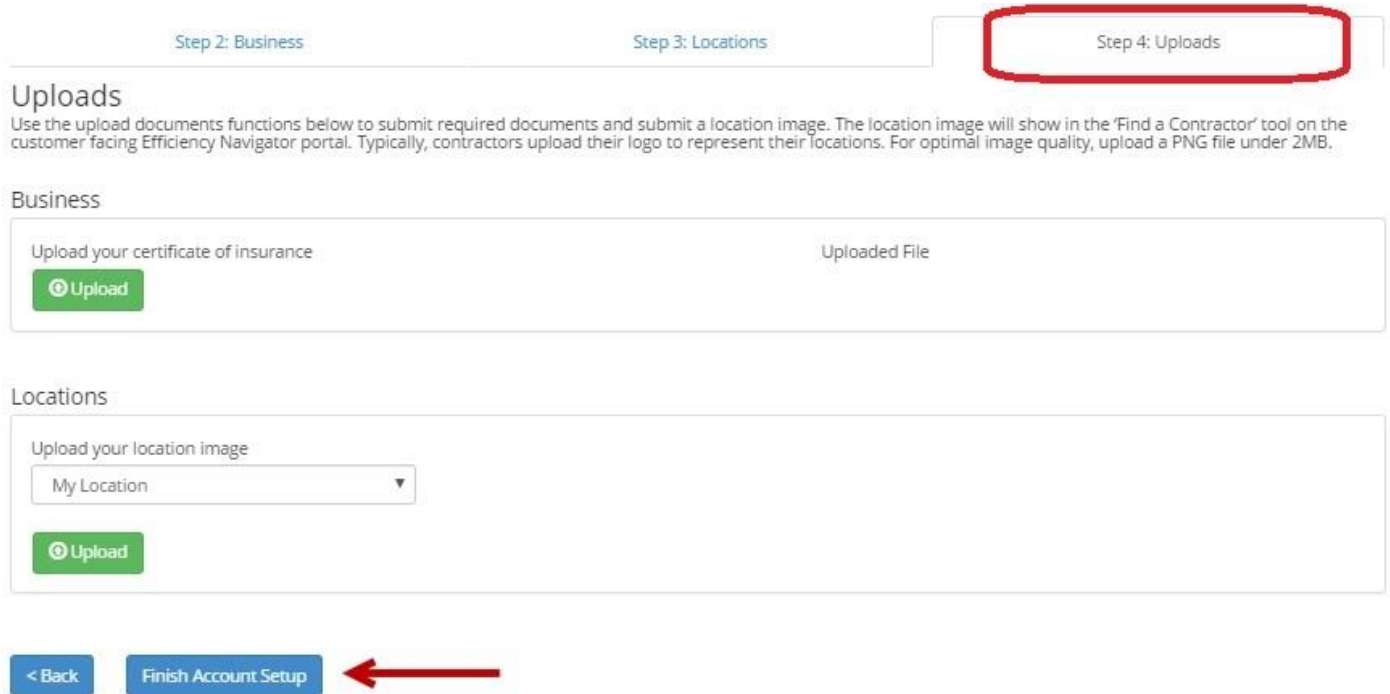
Add an additional location

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

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

< Back   **+ Save Location**   Continue to Step 4 of 4

13. You will get the following message:

Success

This location has been updated.

OK

a. Click "OK"

14. After all business locations have been added and **SAVED**, click "Continue".

NOTE: If you do not click "+Save Location" before clicking "Continue", all information for that location will be lost.

Continue to Step 4 of 4

Uploads

15. Upload a certificate of insurance and/or a location image as required by your program. If no image is uploaded, there will be no image provided for your business in the Efficiency Navigator customer portal.
16. Click "Finish Account Setup" when you are satisfied with your entry.
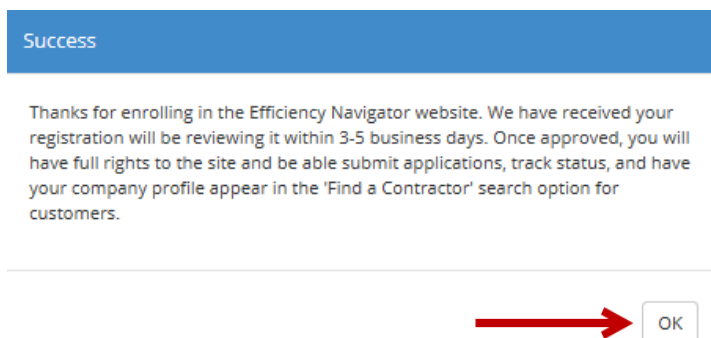
17. You will get the following message:

a. Click "OK"

Application approval

18. Program staff will contact you directly if further information is needed. You will be notified when and if there is a status change regarding your application. Please keep in mind that 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.