Retailer portal user guide
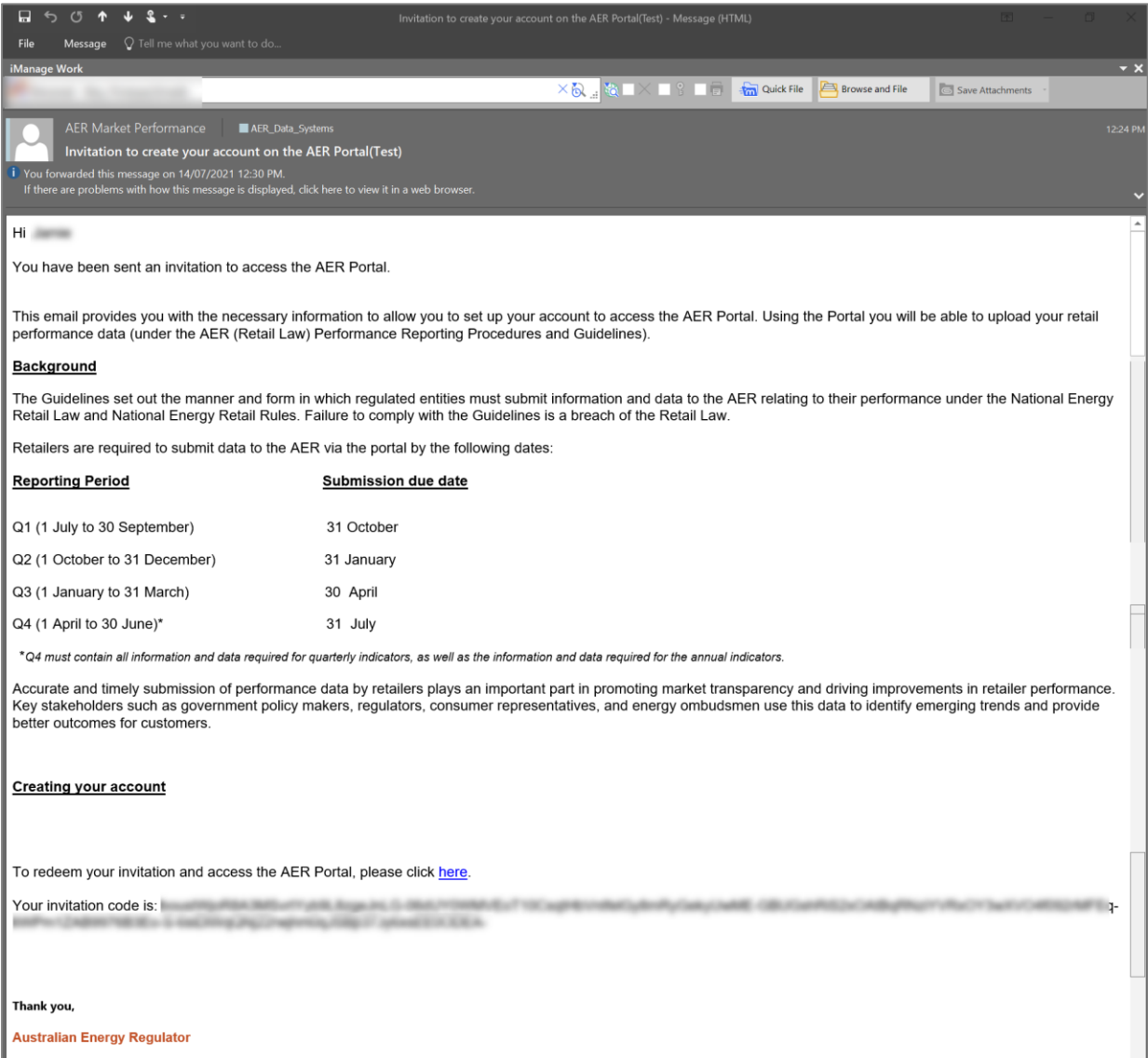
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AUSTRALIAN
ENERGY
REGULATOR

Retailer portal user guide

The AER has developed the **AER portal** to provide a streamlined method for retailers submitting retail performance data under the National Energy Retail Law and National Energy Retail Rules. The portal will also assist retailers in keeping their data and information up to date.

Invitation email

You would have received an email inviting you to establish a portal account. Sample invitation email below.

How to create your account

1. Redeem your invitation

Step 1: Click on the hyperlink in the invitation email and you will arrive at the redeem invitation screen. The code included within the email will auto-populate in the 'Invitation code' field.

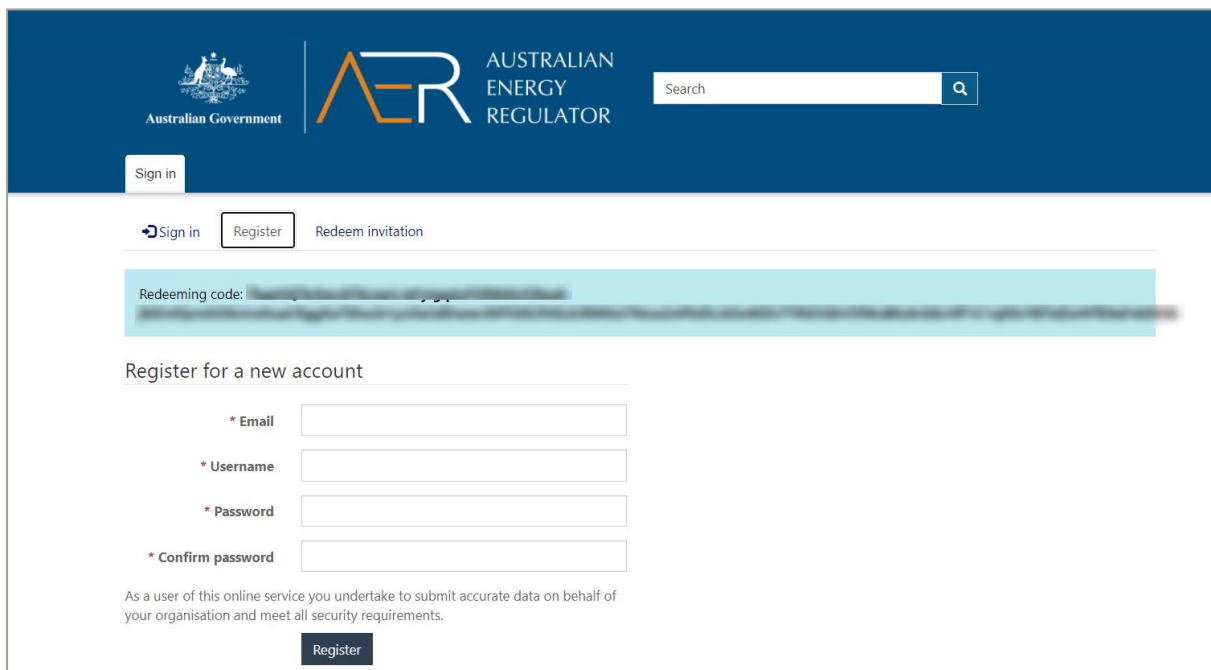**Step 2:** Click the 'Register' button that will take you to the registration screen.

2. Registration

Step 1: Please enter your email and create a username and password to successfully register as an authenticated user. *(There are no restrictions on creating your password).*

Username tip: *This is at the user's discretion, however we suggest that you use an email for your username.*

Step 2: Please tick the checkbox to accept the terms and conditions.

Step 3: You may choose to edit some of your details i.e. first name, last name, email, phone number, website & title. You may also choose to change your password if necessary.
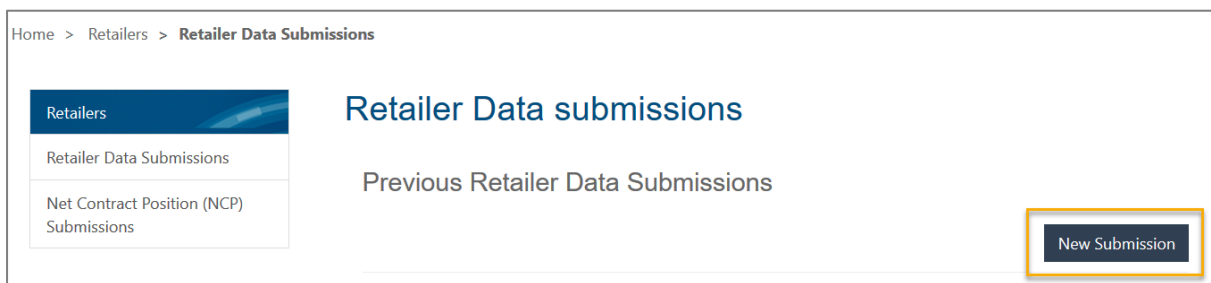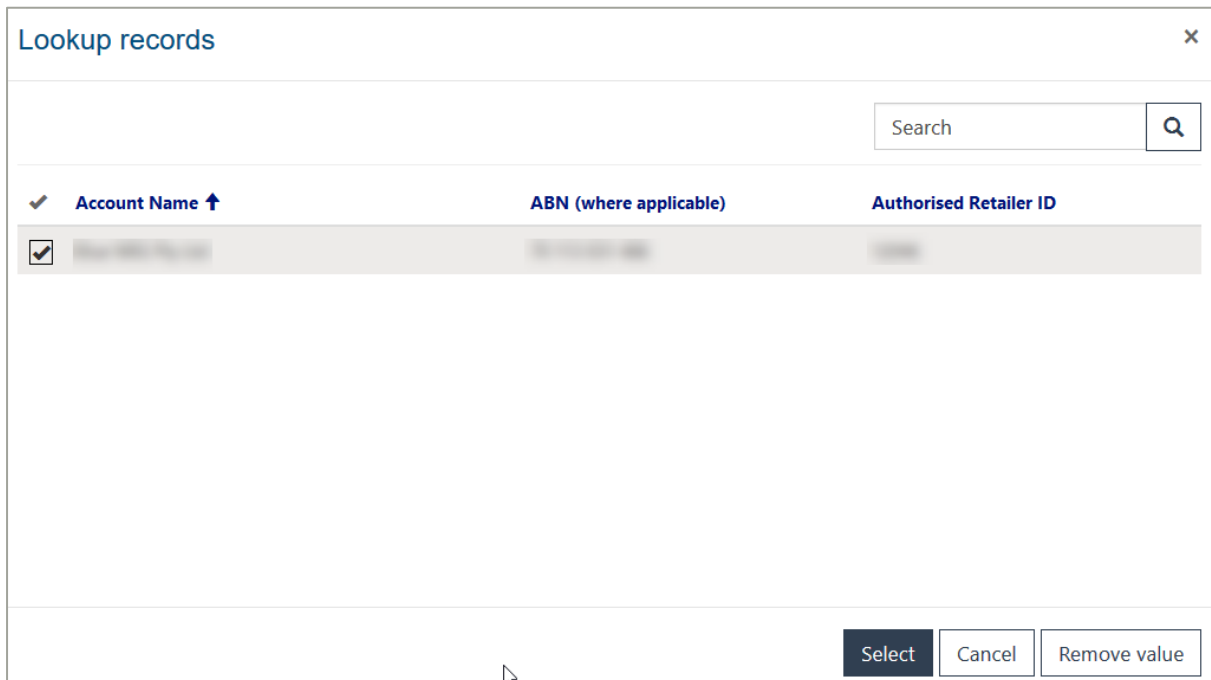
How to create a submission

Step 1: Hover over the "Retailers" tab and click "Retailer Data Submissions"
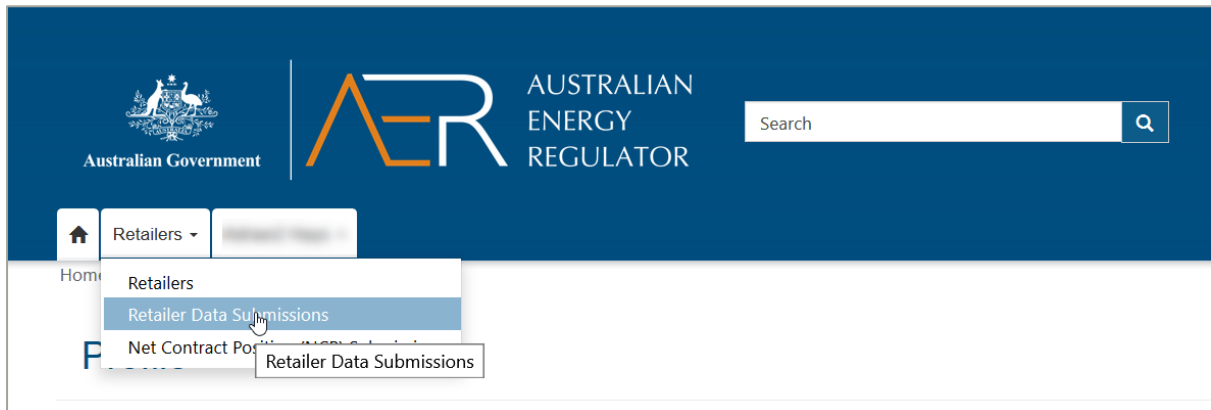
Step 2: Click "New Submission" to create a new record.

Step 3: Select the Authorised Retailer you're submitting data for.

NOTE: *A user could be assigned to one or more authorised retailers. Select the authorised retailer from the look up window.*

NOTE: *If the user is assigned to multiple authorised retailers then only one authorised retailer can be selected at a time. The user should click on "New Submission" to create a new record and choose another authorised retailer from the look up window.*

STEP 4: Select the quarter for which data is being submitted from the Quarter lookup.

	Quarter	Quarter End Date ↓	Due Date	Retailer Reporting Template Version
☑	Q4-2020-2021	30/06/2021	31/07/2021	Version 4.2
☐	Q3-2020-2021	31/03/2021	30/04/2021	Version 4.2
☐	Q2-2020-2021	31/12/2020	31/01/2021	Version 4.2
☐	Q1-2020-2021	30/09/2020	31/10/2020	Version 4.2
☐	Q4-2019-2020	30/06/2020	31/07/2020	Version 4.2
☐	Q3-2019-2020	31/03/2020	30/04/2020	Version 4.2
☐	Q2-2019-2020	31/12/2019	31/01/2020	Version 4.2
☐	Q1-2019-2020	30/09/2019	31/10/2019	Version 4.2

Lookup records

Search

Select   Cancel   Remove value

NOTE: *You may choose to select any Quarter from the look up. However, if you choose anything other than the most recent quarter, an alert message will appear to inform you of your selection.*

Please ignore this alert message (shown below) if you are submitting data for a quarter other than the most recent quarter.

Retailer Data Submission

Submission Details
Supporting Files
Summary

Submission Details

You have not selected the most current quarter. Please ensure you want to submit data for Q2-2019-2020 before continuing.

User

Quarter *

Q2-2019-2020

NOTE: *Ensure there isn't an existing "DRAFT" record with an identical set of authorised retailer and financial quarter. Duplicate DRAFT records are not allowed and the following error will be returned.*

If the above error appears, click on the "Retailer Data Submissions" sub-menu to navigate to the Retail Data Submissions landing page.

All existing DRAFT & SUBMITTED records will be listed there as pictured below.

STEP 5: Click "Next" to navigate to the "Add Files" section.

NOTE: *There are three types of files that could be uploaded.*

1. *Retail Performance Reporting File(.xlsm) – Mandatory attachment*
2. *CEO Letter – Mandatory attachment*
3. *Optional Supporting Material – Optional*

NOTE: *The following field values in your "Retail Performance Reporting File" should match with the ones selected in the Submission Details section.*

❖ Authorised Retailer ID – Company look up

❖ Template Version – Quarter look up

❖ Quarter – Quarter look up

Possible Errors when uploading a file

If there is a mismatch between these fields in the Submission Details section and the uploaded Retail Performance Reporting file, then one or all of the following errors (pictured below) could occur

If any of the above errors occur, please navigate back to the Submission Details section and ensure values of Authorised Retailer ID, Template Version and Quarter are consistent with the corresponding fields in the Reporting file.

STEP 6: Once all the files are successfully uploaded, you can navigate to the "Summary" section. The "Summary" section provides a consolidated view of the information you have just entered for your review.

STEP 7: Once you have reviewed your summary you have the option to:

o   submit your record, or

o   save your record draft and exit, or

o   edit your current record,

Submit

o   To submit, click "Submit".

Save and Exit

o   You can also choose to save the record in DRAFT status by clicking on "Save and Exit" and come back later to finalise your submission.
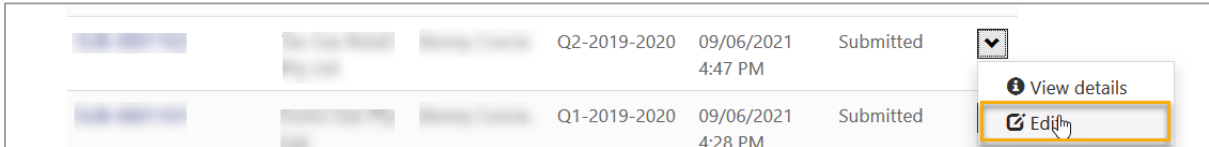
Edit (Previous)

o   To edit your current version, click "Previous". You can navigate back to the section you wish to edit.

Editing your record post submission

You could choose to modify a record after it is submitted should there be any mistakes in the Retail Performance Reporting data file or CEO Letter or any additional supporting documents.

You **must** seek prior consent from the AER to edit a submitted record.

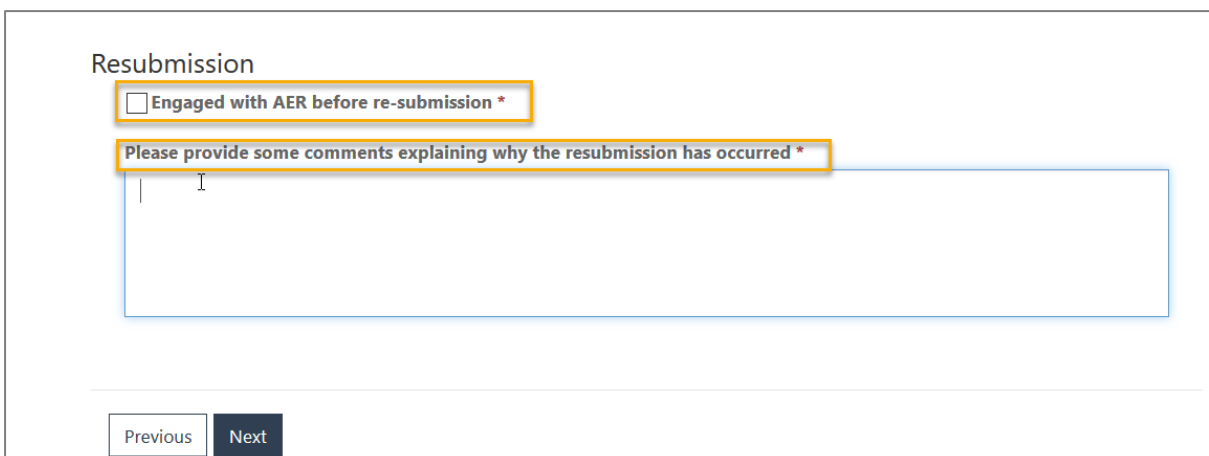**STEP 1:** Click "Edit" from the drop-down menu next to Status column.

NOTE: While modifying a Submitted record you will not be able to change the company and FY quarter for which the data is submitted.

STEP 2: You will be returned to the Submission details page. Click "next" to be taken to the Supporting File section.

STEP 3: Follow from Step 5 under How to create a submission (as noted on page 5) to upload your file.

STEP 4: Once your file is uploaded, you MUST provide your reasons for resubmission in the "Resubmission" section, as it is a mandatory field marked with an asterisk (*). See screenshot in next step.

STEP 5: You MUST also communicate with AER about the reason for the resubmission at MarketPerformance@aer.gov.au prior to editing a submitted record. After receiving confirmation from AER, edit the record & click on the following check-box as it is a mandatory field marked with an asterisk (*).

NOTE: If you haven't completed Step 4 and/or Step 5, one or both of the following errors could occur.

Further assistance

For further information, please contact the AER at MarketPerformance@aer.gov.au for any assistance regarding navigation or functionality of the portal.