

# Retailer portal user guide

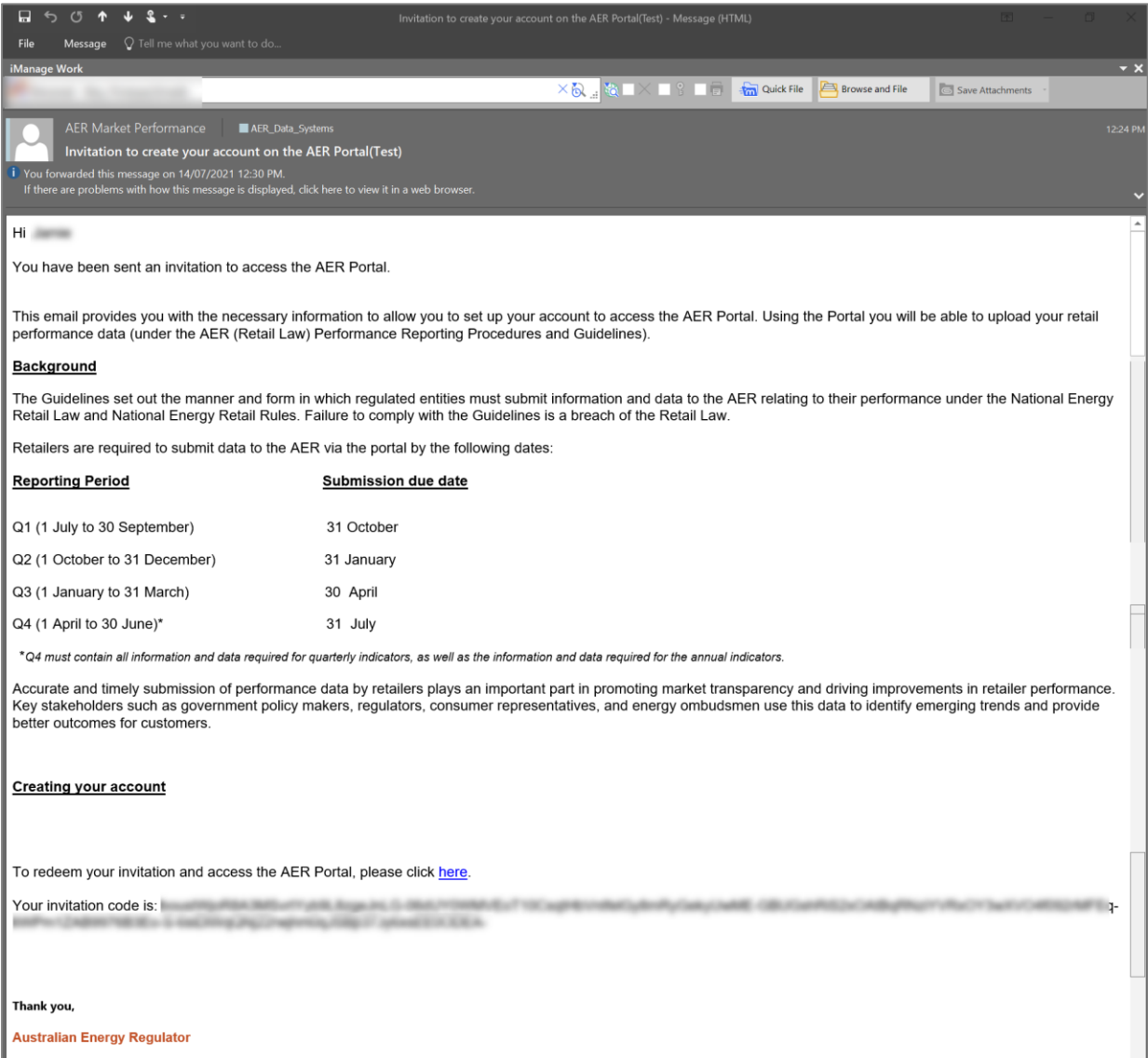
September 2021

## 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.



The screenshot shows an email interface with the following content:

Hi [redacted]

You have been sent an invitation to access the AER Portal.

This email provides you with the necessary information to allow you to set up your account to access the AER Portal. Using the Portal you will be able to upload your retail performance data (under the AER (Retail Law) Performance Reporting Procedures and Guidelines).

**Background**

The Guidelines set out the manner and form in which regulated entities must submit information and data to the AER relating to their performance under the National Energy Retail Law and National Energy Retail Rules. Failure to comply with the Guidelines is a breach of the Retail Law.

Retailers are required to submit data to the AER via the portal by the following dates:

<b>Reporting Period</b>	<b>Submission due date</b>
Q1 (1 July to 30 September)	31 October
Q2 (1 October to 31 December)	31 January
Q3 (1 January to 31 March)	30 April
Q4 (1 April to 30 June)*	31 July

\*Q4 must contain all information and data required for quarterly indicators, as well as the information and data required for the annual indicators.

Accurate and timely submission of performance data by retailers plays an important part in promoting market transparency and driving improvements in retailer performance. Key stakeholders such as government policy makers, regulators, consumer representatives, and energy ombudsmen use this data to identify emerging trends and provide better outcomes for customers.

**Creating your account**

To redeem your invitation and access the AER Portal, please click [here](#).

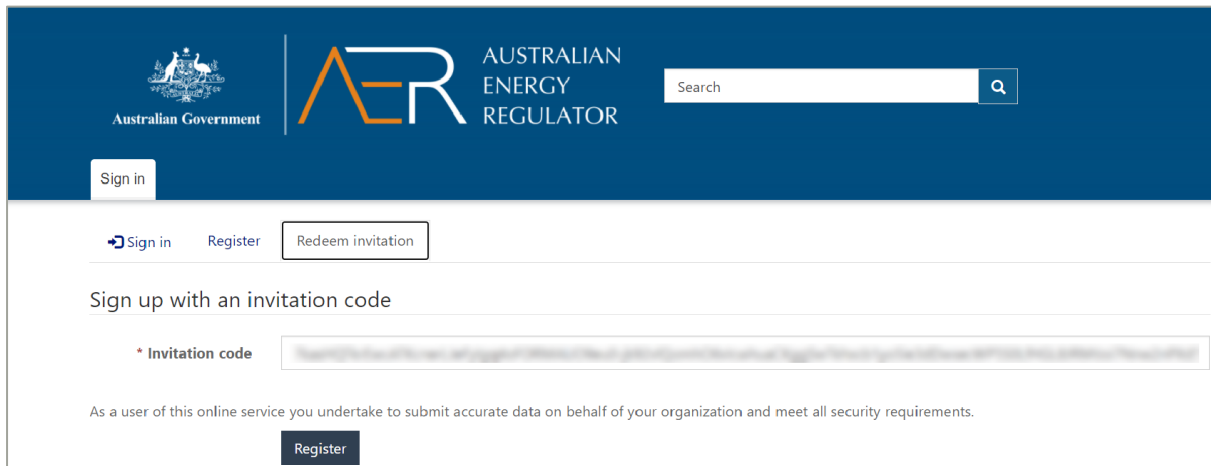
Your invitation code is: [redacted]

**Thank you,**  
**Australian Energy Regulator**

## 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.



Sign in

Sign in Register Redeem invitation

Sign up with an invitation code

\* Invitation code

As a user of this online service you undertake to submit accurate data on behalf of your organization and meet all security requirements.

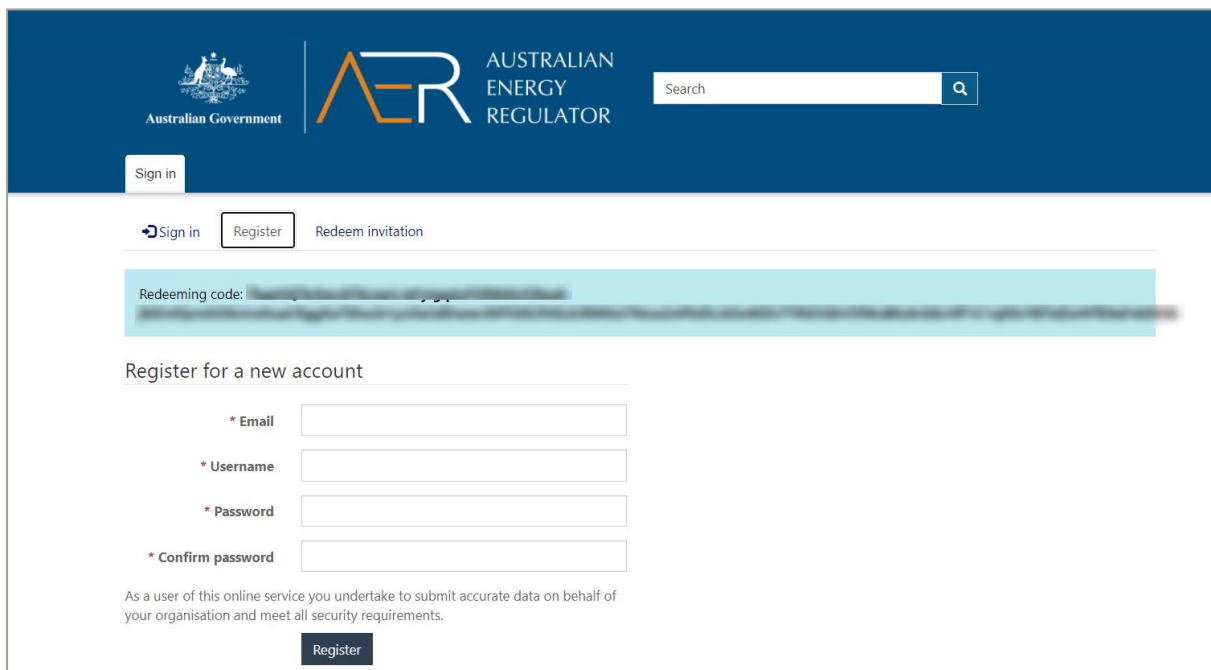
Register

**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.



Sign in

Sign in Register Redeem invitation

Redeeming code:

Register for a new account

\* Email

\* Username

\* Password

\* Confirm password

As a user of this online service you undertake to submit accurate data on behalf of your organisation and meet all security requirements.

Register

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

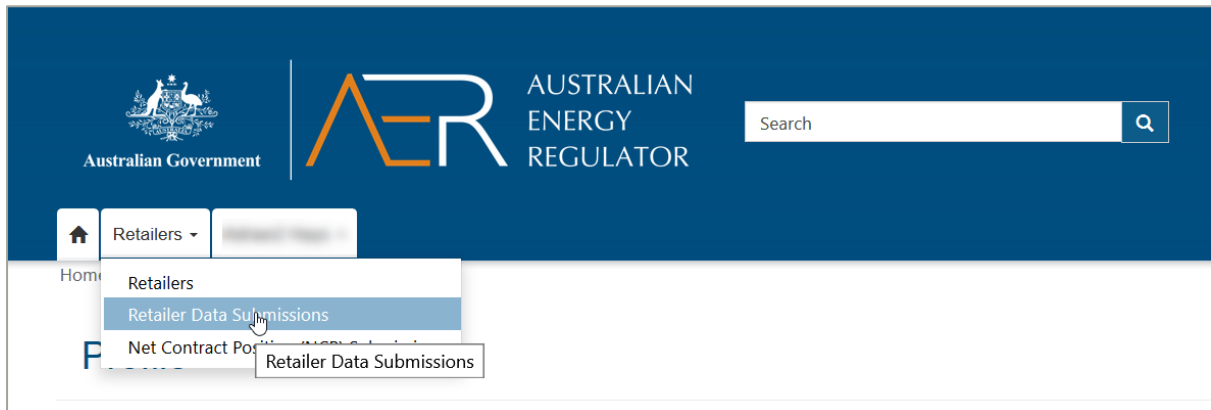
The screenshot shows the AER portal's Terms and Conditions page. At the top, there is a dark blue header with the Australian Government logo on the left, the AER logo in the center, and the text 'AUSTRALIAN ENERGY REGULATOR' on the right. A search bar is located in the top right corner. Below the header, a 'Sign in' button is visible. The main content area is white and features the title 'Terms and Conditions' in blue. Below the title, there is a paragraph explaining that the AER portal is an online digital service of the Australian Government and is restricted to authorized users. This is followed by a section titled 'As an authorised user you are responsible for:' with three bullet points: 'Providing correct and up-to-date information to the AER on behalf of your organisation', 'Keeping your login details safe and making sure that only you can access the portal with them', and 'Informing the AER if you think that anyone else has access to your login details'. Another section titled 'You must not use this online service:' lists four bullet points: 'For any illegal or fraudulent activity', 'To access data without authority', 'To insert, alter, erase or destroy data without authority', and 'In a way that impedes or prevents access to the service by other users'. At the bottom of the page, there is a checkbox labeled 'I agree to these terms and conditions.' and a 'Continue' button.

**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.

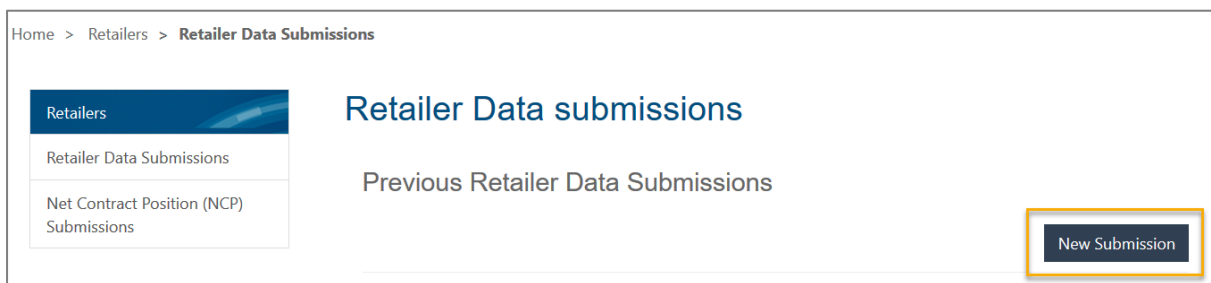
The screenshot shows the AER portal's Profile page. The header is identical to the previous page. Below the header, there is a navigation bar with a home icon, a 'Retailers' dropdown menu, and a 'Profile' button. Below the navigation bar, there is a breadcrumb trail 'Home > Profile'. The main content area is white and features the title 'Profile' in blue. On the left side, there is a sidebar with a 'Profile' button and a 'Security' section containing 'Change Password' and 'Change Email' buttons. The main content area contains a form with several fields: 'First Name', 'Last Name \*', 'E-mail', 'Business Phone', 'Web Site', 'Title/Position', and 'Company'. The form fields are arranged in two columns. The 'First Name' and 'Last Name \*' fields are in the top row, 'E-mail' and 'Business Phone' are in the second row, 'Web Site' and 'Title/Position' are in the third row, and 'Company' is in the fourth row. The form fields are highlighted with a yellow border.

## How to create a submission

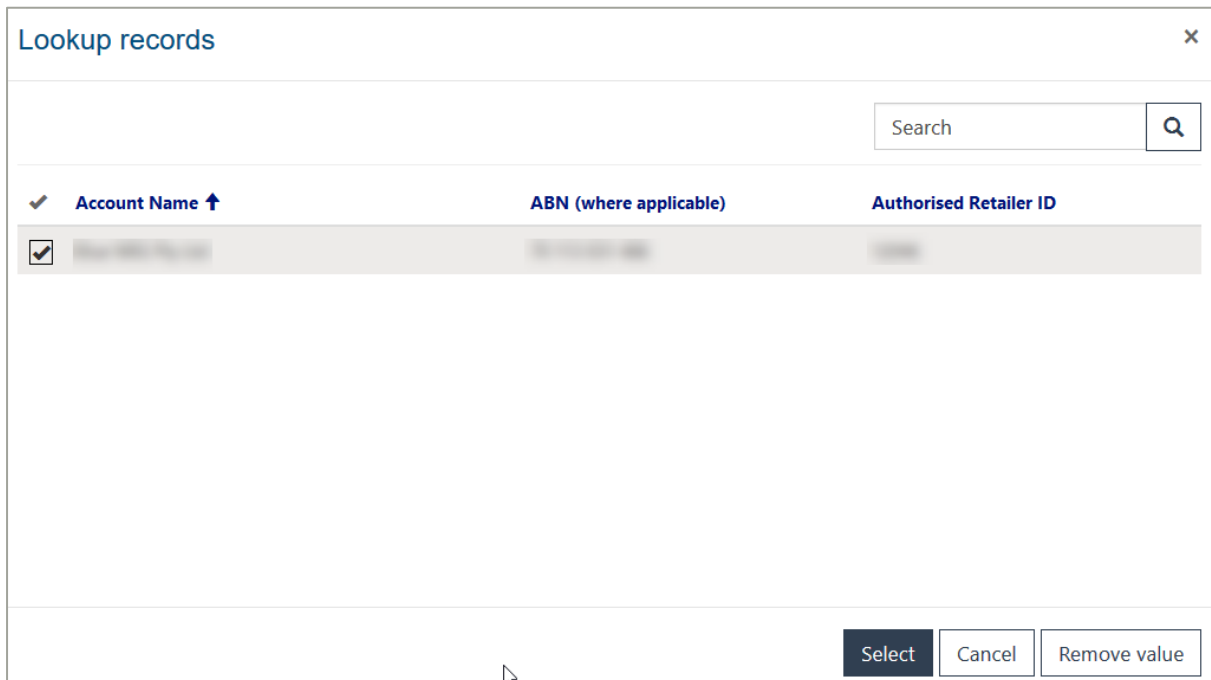
**Step 1:** Hover over the "Retailers" tab and click "Retailer Data Submissions"



**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.

### Lookup records

<input checked="" type="checkbox"/>	Quarter	Quarter End Date ↓	Due Date	Retailer Reporting Template Version
<input checked="" type="checkbox"/>	Q4-2020-2021	30/06/2021	31/07/2021	Version 4.2
<input type="checkbox"/>	Q3-2020-2021	31/03/2021	30/04/2021	Version 4.2
<input type="checkbox"/>	Q2-2020-2021	31/12/2020	31/01/2021	Version 4.2
<input type="checkbox"/>	Q1-2020-2021	30/09/2020	31/10/2020	Version 4.2
<input type="checkbox"/>	Q4-2019-2020	30/06/2020	31/07/2020	Version 4.2
<input type="checkbox"/>	Q3-2019-2020	31/03/2020	30/04/2020	Version 4.2
<input type="checkbox"/>	Q2-2019-2020	31/12/2019	31/01/2020	Version 4.2
<input type="checkbox"/>	Q1-2019-2020	30/09/2019	31/10/2019	Version 4.2

**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 \*

**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.

**Retailer Data Submission**

**Submission Details**

Submission Details | Supporting Files | Summary

A submission already exists for the selected authorised retailer and quarter. Please select a different authorised retailer or quarter, or return to the submission list and edit the existing submission.

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

User: [Redacted] Quarter\*: Q2-2019-2020

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

Australian Government | AUSTRALIAN ENERGY REGULATOR

Home | Retailers - Protay Roy -

Retailers | Retailer Data Submissions | Net Contract Position (NCP) Submission | Retailer Data Submissions

**Submission Details**

Submission Details | Supporting Files | Summary

A submission already exists for the selected authorised retailer and quarter. Please select a different authorised retailer or quarter, or return to the submission list and edit the existing submission.

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

User: [Redacted] Quarter\*: Q2-2019-2020

Authorised Retailer: [Redacted] Additional confirmation email address (optional): [Empty]

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

Home > Retailers > Retailer Data Submissions

Retailers

Retailer Data Submissions

Net Contract Position (NCP) Submissions

## Retailer Data submissions

Previous Retailer Data Submissions

New Submission

ID ↓	Company	User	Quarter	Submission Date	Status	
SUB-0001114	[REDACTED]	[REDACTED]	Q1-2019-2020	29/06/2021 5:23 PM	Submitted	▼
SUB-0001106	[REDACTED]	[REDACTED]	Q1-2020-2021	14/07/2021 10:49 AM	Submitted	▼
SUB-0001105	[REDACTED]	[REDACTED]	Q3-2019-2020		Draft	▼

**STEP 5:** Click “Next” to navigate to the “Add Files” section.

## Submission Details

User: [REDACTED]

Quarter: Q3-2020-2021 [X] [Q]

Authorised Retailer: [REDACTED] [X] [Q]

Additional confirmation email address (optional): [REDACTED]

Title/Position: —

Username, Authorised Retailer or Title/Position incorrect?  
Update your user details.

Next



## Retailer Data Submission

Submission Details ✓

Supporting Files

Summary

### Supporting Files

<b>Authorised Retailer</b>	<b>Quarter</b>
[REDACTED]	[REDACTED]

Retail performance reporting (Excel workbook in .xslm format) (Required)

v

[Add File](#)

**Uploaded files**

No files have been uploaded

**Please provide any commentary on your data submission**

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

1. Retail Performance Reporting File(.xslm) – 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

The screenshot shows a web interface for 'Retailer Data Submission'. On the left is a navigation menu with 'Submission Details' (checked), 'Supporting Files', and 'Summary'. The main content area has a red error banner with the following text:

**The form could not be submitted for the following reasons:**

Reporting file failed validation:

- Authorised Retailer Id [redacted] does not match the expected ID of [redacted] for the selected authorised retailer
- File template version of Version 5 is incorrect, should be Version 4.2 for the selected quarter
- Reporting period of Q3 is invalid, should be Q4
- Quarter year 2021-22 does not match expected value of 2019-20

Below the error banner is the 'Supporting Files' section. It contains a table with two columns: 'Authorised Retailer' and 'Quarter'. The 'Authorised Retailer' field is redacted. The 'Quarter' field is set to 'Q4-2019-2020'. Below the table is a text input field with the placeholder 'Optional supporting material file (Word, PDF, Excel or other)' and a dropdown arrow, followed by an 'Add File' button.

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:

- submit your record, or
- save your record draft and exit, or
- edit your current record,

### Submit

- To submit, click “Submit”.

### Save and Exit

- 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)

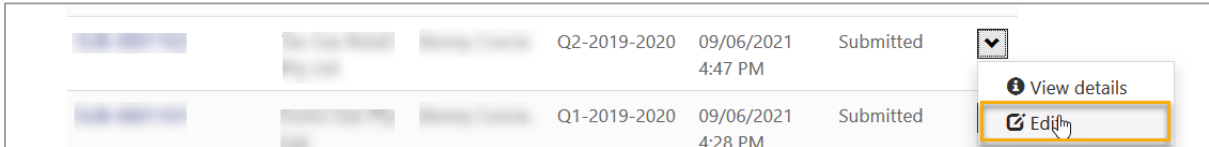
- To edit your current version, click “Previous”. You can navigate back to the section you wish to edit.

## 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.



[blurred]	[blurred]	[blurred]	Q2-2019-2020	09/06/2021 4:47 PM	Submitted	▼
[blurred]	[blurred]	[blurred]	Q1-2019-2020	09/06/2021 4:28 PM	Submitted	View details Edit

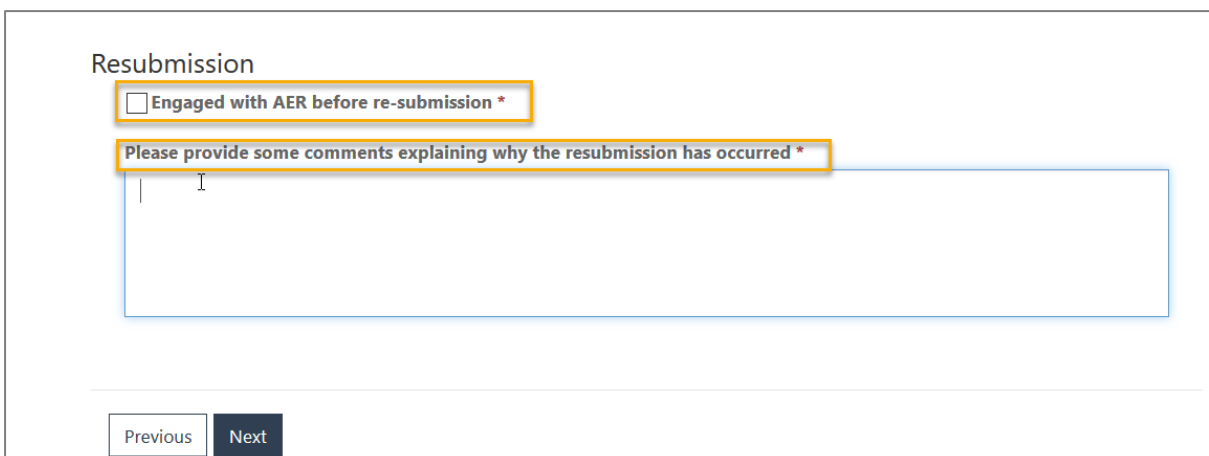
**NOTE:** While modifying a Submitted record you will not be able to change the company and FY quarter for which the data is submitted.

**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](mailto: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 (\*).



Resubmission

Engaged with AER before re-submission \*

Please provide some comments explaining why the resubmission has occurred \*

Previous Next

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

### Retailer Data Submission

Submission ✓	<b>ⓘ</b> The form could not be submitted for the following reasons: Re-submission comments must be completed when changing a Submitted record You must confirm that you have engaged with the AER prior to re-submitting
Supporting Files	
Summary	

Add Files

## Further assistance

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