

GEO training for activity 6 A/C

This guide will guide you step-by-step on how to submit your first form using our platform. You'll learn how to:

- Set up an assignment form
- Fill out the details that need to be captured.
- Capture the required evidence to submit a claim.

For the best experience, watch the [full training video](#). Otherwise, read on to get a breakdown of the step-by-step in text/images.



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The Basic Details

This is the first page you'll see whenever you start a new claim with us.

The first field to complete is for the Site "**Address**". You'll be presented with a dropdown menu to select the address.

If it doesn't appear, you can click on the 'Input Manually' button located at the top left and enter the address there.

The '**Client**' section will automatically populate with your company details."

[Click here to watch the video training for this part.](#)

Fill the "**Client Selected Reference**" field with your own reference for each job (the one you use in your system)

[Click here to watch the video training for this part.](#)

In the "**Activity Field**", select "Air Conditioning" (Activity 6). The Subsidiary Field will be defaulted to "Green Energy Trading).

[Click here to watch the video training for this part.](#)

"**Original Energy Saver**" should be selected depending on which type of property you are upgrading.

If it's a residential house, select "Individual".

If it's a commercial building, select "Corporate Body"

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For Individuals, fill out the "**First Name**" and "**Last Name**" of the homeowner/energy consumer who signed off for the upgrade.

Click

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Once you hit Create, you'll be taken to the Geo Form.

The Assignment Form

Few things to note:

- **On the top left, you can see the reference number for the form. If you ever need to contact us about a job, please use this reference number so we can locate it.**
- To the right of the assignment reference, you'll see the end consumer's name.

AC-WIC-040000993 - Ashley Chan
GET Test Client / Air conditioning
SAVE 0 VEECS ANTICIPATED
Actions
Form
Client assigned reference: 12345

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Energy Consumer Section

Fill out the end consumer "**First Name**", "**Last Name**", "**Phone**" and "**Email**"

Energy consumer
Entity type *
Individual
First name *
Ashley
Last name *
Chan
Phone *
0412345678
Email
email@email.com

[Click here to watch the video training for this part.](#)

For the "**Type of benefit provided**", you get to pick from "upfront cash", "price reduction", "delayed cash", "free installation" and "other".

The most common scenario will be "price reduction". If you pick "other", an additional field will pop up for you to describe.

Type of benefit provided *
upfront cash
price reduction
delayed cash
free installation
other
Benefit amount provided to the Energy Consumer *
Required
When the type of benefit provided is not monetary in nature, please provide an equivalent dollar amount.
Lead generation company name *
Required

In "**Benefit amount provided to the Energy Consumer**", you'll fill the benefit amount your consumer is receiving.

The value that you decide on needs to be reflected in the Customer Tax Invoice that the end consumer will receive.

Phone *
0412345678
Email
email@email.com
Type of benefit provided *
price reduction
Benefit amount provided to the Energy Consumer *
\$500
When the type of benefit provided is not monetary in nature, please provide an equivalent dollar amount.

[Click here to watch the video training for this part.](#)

In “**Method Lead Generation**”, you should select the method you use to generate your sales.

If you use a third-party company, you will be asked to provide their name.

[Click here to watch the video training for this part.](#)

In “**Is the System Owner registered for GST**”:

- For Residential Upgrades” select “No”
- For an upgrade on a commercial business, you can fill out the ABN, and the ABN lookup you show you if the business is registered for GST. Then you can answer accordingly.

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Installation Dates

In “**Installation**”, Pick the date that the installation took place.

If the installation took multiple days, always select the last day work was undertaken at the site.

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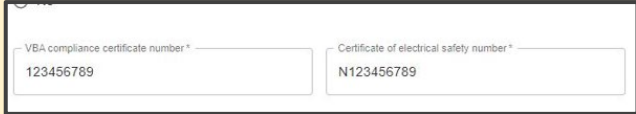

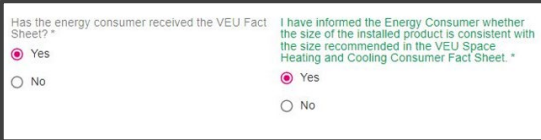
The address will be defaulted to the same one you filled in the first section. In “**Premises type**”, you pick “Residential” or “Commercial”.

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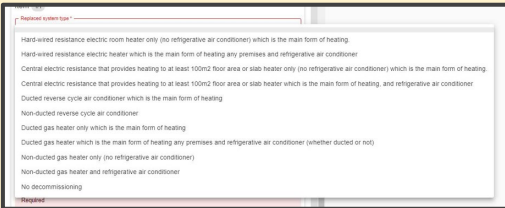

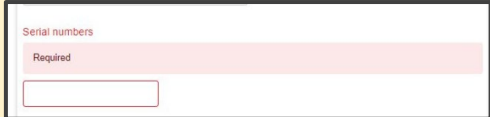
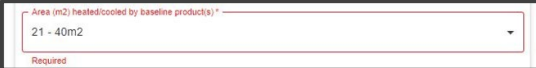
Here, you will select if the building that the upgrade will take place in is more or less than 2 years old.

Buildings must be at least 2 years old to claim the baseline unit. If a building is **less** than 2 years old, then the baseline unit is **not eligible** to be included in this submission.

You can only claim the baseline scenario as ‘**No decommissioning**’ in this instance.

<p>You should then write the “VBA compliance certificate number” and the “Certificate of electrical safety number”. If you don’t have these numbers with you, leave these blank and return to them later once you have them.</p>	 <p>Click here to watch the video training for this part.</p>
<p>In the next two sections, you should confirm how the end consumer will receive these mandatory documents.</p> <p>Click “Sent” if the was already sent to the client or that the client will receive the documents shortly if the documents are being prepared.</p>	 <p>Click here to watch the video training for this part</p>
<p>For “Has the Energy Consumer received the “VEU Fact Sheet”, and “I have informed the Energy Consumer whether the size of the installed product is consistent with the size of the recommended...”,</p> <p>You can select “Yes”. We’ll always send a copy of the Fact Sheet to the End Consumer once they sign-off for the upgrade on Geo.</p>	 <p>Click here to watch the video training for this part</p>

System Installation Details

<p>For “Replaced system type”. Pick the option that describes your baseline scenario.</p> <p>These scenarios are all taken from the Activity Guide</p>	 <p>Click here to watch the video training for this part</p>
<p>Then, you select the “Brand” and “Model” of the unit that will be installed. Then add the “Quantity” installed.</p>	 <p>Click here to watch the video training for this part</p>
<p>Fill out the Serial numbers. If you don’t have that with you, leave it blank and come back to it later.</p>	 <p>Click here to watch the video training for this part</p>
<p>The next section is related to the floor space area of where the baseline unit was located.</p> <p>Select the range that best represents the room area where the old unit was in.</p>	 <p>Click here to watch the video training for this part</p>

Then, you repeat this process for the space where the upgrade product will be installed. If the new product will be installed in the same area as the baseline unit, the range will be the same as what you selected previously.

[Click here to watch the video training for this part](#)

You'll need to pick "Yes" or "No" to answer if the product installed meets the size requirements as per the [VEU fact sheet](#). This is a guideline from the VEU.

You can install equipment that don't follow this size requirement as long as you provide a justification. If that's the case, when you click "No", a new field will appear where you can provide a short statement justifying why the new product didn't meet the sizing requirements. (i.e. room didn't receive enough sunlight).

RECOMMENDED SIZE FOR SINGLE-SPLIT OR MULTI-SPLIT AIR CONDITIONING		
Room size	Example room	Recommended heating output
Small (up to 20m ²)	Bedroom, study	2.5 to 3 kW
Medium (21-40m ²)	Bedroom with ensuite, small lounge	3 to 5 kW
Large (41-60m ²)	Lounge, large kitchen	5 to 8 kW
Very large (More than 60m ²)	Open plan areas, large lounges	+8 kW

[Click here to watch the video training for this part](#)

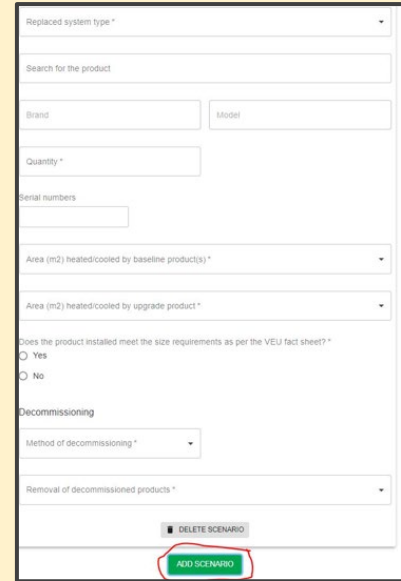
For **method of decommissioning**, please pick the one that describes your installation. Most of the time, if a unit is removed from site and taken to an EPA accredited recycling facility, you'll select "Disconnected and Removed". In specific cases, you don't need to remove the old product. In these cases, you'll need to provide photos showing the unit being inoperable.

In "**Removal of decommissioned product**" you'll confirm either the unit was removed by the installer to be recycled at an EPA approved site or it was left on site.

[Click here to watch the video training for this part](#)

If you are installing a multi-split system. You will enter the details for the first system against the baseline scenario. After you have filled out everything else in the system section, click on 'Add Scenario' at the bottom.

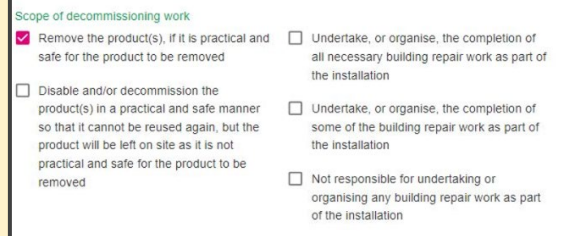
A new section will pop up below the one you have just filled out. Next, enter the baseline scenario as 'No Decommissioning', enter the upgrade product and fill out the rest of the section. When you click the save button, Geo will update the VEEC total. You can add up to 5 split systems as per the VEU requirements.



[Click here to watch the video training for this part](#)

In “**Scope of decommissioning work**”, you’ll pick the situation that best describes your decommissioning method. Mostly, you’ll pick either “Remove the product(s), if it’s practical and safe for the product to be removed” or “Disable and/or decommission the product(s) in a practical and safe manner so that it cannot be reused again, but the product will be left on site as it is not practical and safe for the product to be removed”.

The options on the right only need to be considered if any construction work was done to remove the baseline unit. (i.e. roof was removed to retrieve baseline unit).



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Installation Team

This is where you fill the details of the team who completed the installation on site. **Your installers will need to complete our installer training prior to be able to be selected as an installer in Geo.**

Select the installer. If the same installer does multiple jobs, you can select "Yes" for the next two questions that ask if the electrician is the same as the licensed plumber and if the refrigeration mechanic is the same as the licensed plumber.

Installation team

Licensed plumber *

GET Admin

First name GET

Last name Admin

Phone 0403307871

Email demo.pv.installer@gmail.com

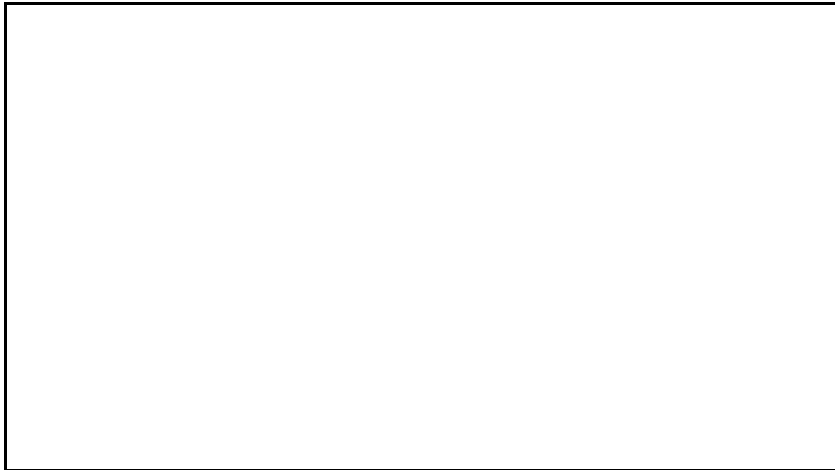
Licenses Missing licence valid at the time of the installation

Working for Test Client

Was a Registered Plumber involved who will sign off on the installation? *

Yes

No



Is the electrician the same as the licensed plumber? *

Yes

No

Required

Electrician *

Required

CLEAR EDIT NEW TEAM MEMBER

Is the refrigeration mechanic the same as the licensed plumber? *

Yes

No

Required

Refrigeration mechanic *

Required

[Click here to watch the video training for this part](#)

Payment

Select who will be receiving the cashback from GET for the installation. Most of the time, you'll select your own company.

Hit "Save" on the top left corner and the main form is completed.

Payment

Test Client

Ashley Chan (System Owner)

[Click here to watch the video training for this part](#)

Onsite

Here you will add the installation team members that can see this form in the GET Onsite App.

AC-WIC-24000993 - Ashley Chan

GET Test Client Air conditioning

SAVE 18 VECS ANTICIPATED

Actions

Form

Onsite

Photos

Documents

Agreements

Submit

Exports

Onsite

Save time, energy and paper with our simple, easy to use mobile app.

- Learn more and request login
- Create FAQ's
- Give feedback

Download on the App Store

GET IT ON Google Play

Onsite users

GETAdmin

These users will have access to this job in our mobile app.

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Photos

Here you will see all the photos you need to provide and capture on the GET Onsite app.

Any scenarios you add into the Geo Form, will populate what photos are required for your installers in the GET Onsite app when conducting the installation.

Tip: Add in the baseline scenario and the brand and model number of the installed product in a Geo form prior to doing the upgrade itself to see the photo prompts in the Onsite App.

The screenshot shows the 'Front of premises' section with a 'Required' status and an 'UPLOAD' button. Below it is the 'Additional Photo Evidence' section, also with a 'Required' status and an 'UPLOAD' button. At the bottom, there is a table for 'Activities' with columns for 'Name', 'No. of uploads', 'Required', and 'UPLOAD'.

Name	No. of uploads	Required	UPLOAD
New product - compliance stickerplate (before unit)	0	Required	UPLOAD
New product - in situ after installation	0	Required	UPLOAD
Existing product - in situ before removal	0	Required	UPLOAD
Existing product - after removal or decommissioning	0	Required	UPLOAD
Existing product - compliance stickerplate	0	Required	UPLOAD
New product - compliance stickerplate (after unit)	0	Required	UPLOAD

[Click here to watch the video training for this part](#)

Document

This is where you will upload the required documents: Plumbing compliance certificate, Certificate of Electrical Safety, Customer Tax Invoice and Recycling Evidence (if old unit was removed from site)

If the old unit was taken to an EPA accredited recycling facility, you will need to provide recycling evidence. This can simply be a recycling docket/receipt/invoice you can request from the recycling facility when you drop off the old unit.

The recycling document will need to list the:

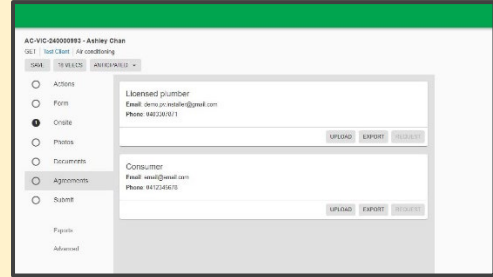
- Recycling company
- Date the unit was dropped off
- Either the quantity of units dropped off **or** the total weight (kg) of the units dropped off.

The screenshot shows the 'Documents' section with a 'Required' status and an 'UPLOAD' button. Below it are sections for 'Certificate of Electrical Safety', 'Customer tax invoice', and 'Recycling evidence', each with a 'Required' status and an 'UPLOAD' button.

[Click here to watch the video training for this part](#)

Agreements

This is the place to capture the signature of the installer and the end consumer. The “request” button will be greyed out if the form is incomplete. But once the form is completed, you can press “Request” to send an automatic email to collect the signatures.



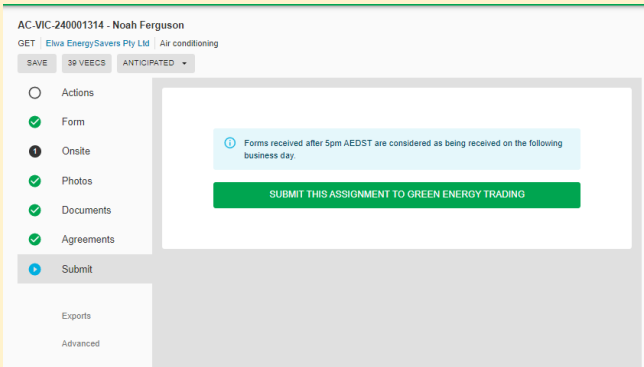
[Click here to watch the video training for this part](#)

Submit

Once the form is complete and all the photos, documents and agreement signature have been provided, you'll can submit this form by clicking on the “submit” button.

The way you can tell all sections are complete is if a green tick is present on the left side of the page. If a section does not have a green tick, this will not allow you to submit the form yet and will need resolving.

From there, we will contact you to make amendments to the form if needed or submit it to the Regulator.

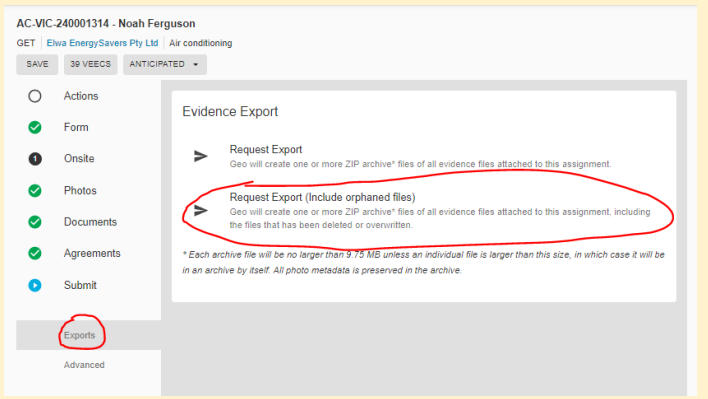


[Click here to watch the video training for this part](#)

Exports

We understand that Geo will not always be the only system you use for tracking work you have completed with photo evidence.

Thats why we have included an export functionality for all photos located in Geo. If you select the export button, a link with the photos will be emailed to you for downloading.



Finding your Form:

Go to the legacy version of Geo. Click "In progress" under Assignments for this contact. Type "ac" in the search. Find your form, click it and then you can continue from where you left off.