

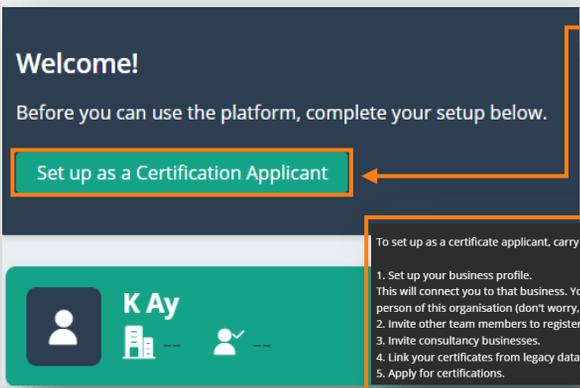
A Learning Guide

Certificate Applicants setting up your business

1 Setting up your business

Once you have completed creating your account (see [Setting up yourself](#) on the EESS Platform in the [Learning guides](#)) and selected how you intend to use the EESS platform, when you log in again you will see a 'Welcome' message top left of your screen. Below this will be a button to set up your business

It is important that only one person from your business completes this activity (see [Understanding Roles and Permissions](#) in the [Learning guides](#)). The person who does this will have the Business Admin permissions. This can be changed later when you invite your team members to join the business you have set up



Welcome!
Before you can use the platform, complete your setup below.

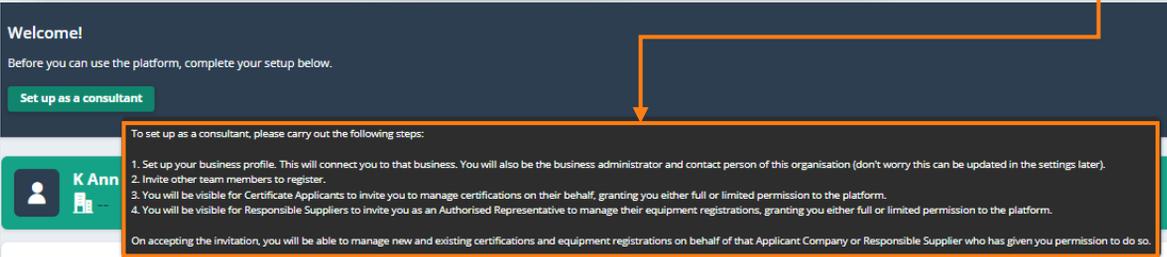
[Set up as a Certification Applicant](#)

To set up as a certificate applicant, carry out the following steps:

1. Set up your business profile. This will connect you to that business. You will also be the business administrator and contact person of this organisation (don't worry, this can be updated in the settings later).
2. Invite other team members to register.
3. Invite consultancy businesses.
4. Link your certificates from legacy database.
5. Apply for certifications.

This button will reflect the intent selected previously when creating your individual account

Hovering over the button provides more information



Welcome!
Before you can use the platform, complete your setup below.

[Set up as a consultant](#)

To set up as a consultant, please carry out the following steps:

1. Set up your business profile. This will connect you to that business. You will also be the business administrator and contact person of this organisation (don't worry this can be updated in the settings later).
2. Invite other team members to register.
3. You will be visible for Certificate Applicants to invite you to manage certifications on their behalf, granting you either full or limited permission to the platform.
4. You will be visible for Responsible Suppliers to invite you as an Authorised Representative to manage their equipment registrations, granting you either full or limited permission to the platform.

On accepting the invitation, you will be able to manage new and existing certifications and equipment registrations on behalf of that Applicant Company or Responsible Supplier who has given you permission to do so.

To begin setting up your business

- Click on the button

2 Enter your business information

To enter the information

- Select the Country using the dropdown
- Once you enter the correct ABN/NZBN* click on the **Search ABN/NZBN** button.
The platform will look up the ABN/NZBN and if found, the Business & Trading name fields will auto populate
- Enter a business email address**
- For country code type a + then select the correct code from the list
- Enter your business phone number

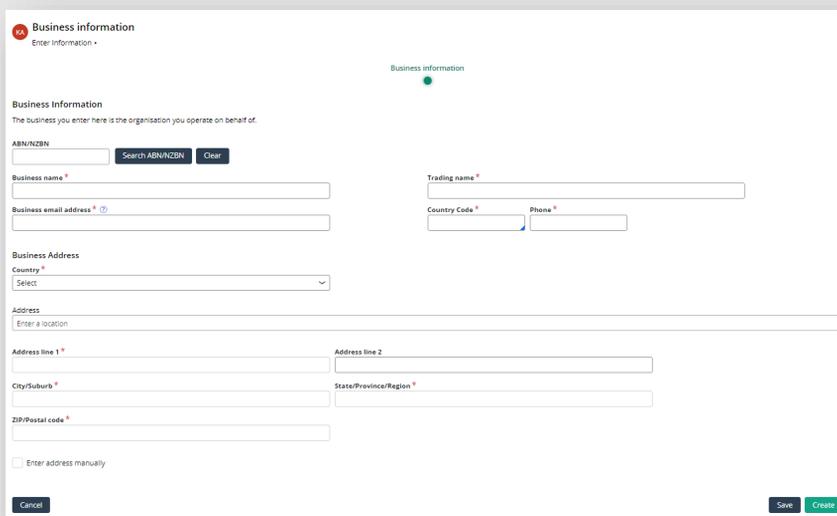
For Business Address:

- Select country
- Start typing the address to select it from a drop-down or
- Click the box to enter the address details manually
- When done click the **Create** button

*ABN/NZBN: The Australian or New Zealand Business Number.

IRDN: Inland Revenue Department Number for New Zealand companies.

** it is advisable the business email address be generic such as:
infoequip@xyzcompany .com
and not an individual's email address as that person may leave the organization at some point



- You will receive a success message and a summary of the details you entered to set up your business
- You will then be logged out



Business Information	
The business you entered is the organisation you operate on behalf of:	
ABN/NZBN	Business email address
51 3611136211	info@xyz.com
Business name	Business phone number
THOMAS	94997033
Trading name	Business address
Thomas	101 Collins Street, Melbourne, 3005, Australia

Business Setup is complete

NEXT STEPS:

- When you log back in you can begin:
 - Inviting your team members and consultants if relevant
 - Applying for certificates to Energy Safe Victoria or Office of the Technical Regulator (South Australia)
 - View the certificates details put on by RECS Private Certifiers for you

Note: provide the business details used to onboard the platform to your certifier:

- Business name as shown on your Certificate Applicant account
- Trading name as shown in your Certificate Applicant account
- ABN (or IRDN if NZ)
- Business email as shown on your Responsible Supplier account
- Business Address
- Business ID (BUSINESS-XXXXX) visible in the business details on the 'My Organisation' page when they have logged on to the EESS Platform

And request the certifier uses these details to select the correct 'certificate applicant' to upload your certificate data to their EESS account, so you can see it in searches when they log in

- If you realise that you need to also set up as a Responsible Supplier, when you log back in you can [Register as a responsible supplier](#)
- For more information, see the [Learning guides](#) :
 - Understanding Role and Permissions
 - Managing Users in the EESS Platform
 - Extending privileges in the EESS Platform

RUSSELLS CHIMNEY & HEATER SERVICE [Edit](#)

<p>Business ID BUSINESS-78313</p> <p>Business name ARTHUR RUSSELL</p> <p>Trading name RUSSELLS CHIMNEY & HEATER SERVICE</p> <p>ABN/NZBN 69139848163</p>	<p>Email address arthur.russell@gmail.com</p> <p>Phone number (+61) 94997171</p> <p>Role Certification Applicant</p>
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Invite a team member

Invite a consultancy business

Register as a responsible supplier