

# Customer Portal User Guide

UAT Help Guide

16/09/2022



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## Introduction

As part of our RII0-2 ambition, the Connections Portal is being designed to transform the Connections Journey and account management for all Customers.

The Portal will provide a single point of contact for all ESO connections customers looking to either connect to or make use of the transmission system. The initial release will look at the digitisation of the application process and include the following high-level functionalities:

- Apply for connections and other agreements online
- Monitor live applications and track progress
- Access to signed contract documents
- View of key milestones / milestone management
- Communicate directly with your connections contract manager

This guide is created to help the users with step-by-step process of using the Portal for the Connections Journey.



## New Account Registration

### Important information

1. Please note the first person registered on the portal from an organisation, will be assigned 'Super User' status.
2. Super user will be managing the registration requests of other users from the organisation. This provides the control to the organisation to manage their users.
3. Up-to 5 users (1 Super user and 4 Standard users) can be registered under an account.
4. An individual email Id can only be used once to register.
5. Users will need Salesforce authenticator app to support the secure login process

### Parent Company and Sub Company/SPV

1. To ensure that your account is set up correctly in the Connection Portal, it is essential that registration request is submitted under the appropriate Parent/Child/SPV set up.
2. If you are the user, who want to have the visibility of all the information across all of your sub companies / SPVs which are under the umbrella of parent company, you need to select the company which is a parent company while submitting the registration request.
3. If you only want to manage an individual Sub Company/SPV, please select the relevant while registering for an account.

### Register new account

1. To access the Customer Portal, you will need to register new account.
2. **Before starting the registration process, please note that first user registering for a company will be assigned 'Super User' status. Super user will have full access of the account and will manage the registration of 'Standard Users' of the company.**
3. **Super User will also have to complete Super User registration form. Instruction will be provided via email sent as part of registration process.**
4. **Also 'Standard Users' will not be able to register until the 'Super User' registration has been completed and active. Customer Portal will automatically check this during registration process and will display the message if another user tries to register while Super User registration still in progress.**

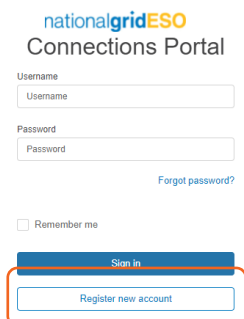
Superuser not active

It looks like the Superuser account for your organisation  
is currently being created.

Unfortunately we cannot process your registration at the moment.  
Please try again later.

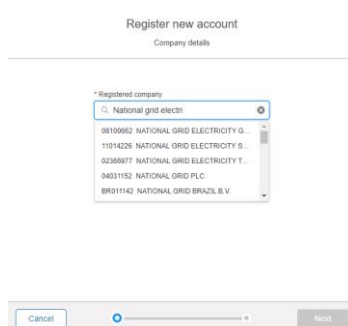
[Return to Login](#)

5. Please follow the below steps for registering new account.
6. Go to Customer Portal webpage and click on 'Register new account'.



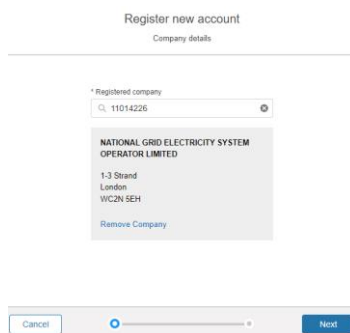
The screenshot shows the 'nationalgridESO Connections Portal' login and registration interface. It includes fields for 'Username' and 'Password', a 'Forgot password?' link, and a 'Remember me' checkbox. At the bottom, there are two buttons: 'Sign in' and 'Register new account'. The 'Register new account' button is highlighted with a red rectangle.

7. The first step is to search for your company for which you want to register. You can search either by company name or registration number. As you will start searching, relevant results will be displayed.



The screenshot shows the 'Register new account' screen with the 'Company details' section. A search bar labeled '\*Registered company' contains the text 'National grid electri'. Below the search bar, a list of search results is displayed, including '08100602 NATIONAL GRID ELECTRICITY G...', '11014226 NATIONAL GRID ELECTRICITY S...', '02395977 NATIONAL GRID ELECTRICITY T...', '04031152 NATIONAL GRID PLC', and '09011142 NATIONAL GRID BRAZIL B V'. At the bottom of the screen, there are 'Cancel' and 'Next' buttons, with a progress indicator showing the first step is active.

8. Select your organisation from the result list, system will show the below screen



The screenshot shows the 'Register new account' screen with the 'Company details' section. The search bar now contains the registration number '11014226'. The search results list shows 'NATIONAL GRID ELECTRICITY SYSTEM OPERATOR LIMITED' as the selected company. Below the company name, the address '1-3 Strand, London, WC2N 5EH' is displayed. A 'Remove Company' link is visible at the bottom of the results. At the bottom of the screen, there are 'Cancel' and 'Next' buttons, with a progress indicator showing the first step is active.

9. Click 'Next' to move to the next step. You can also search again by clicking on 'Remove Company' if needed.
10. Now you will need to enter your details as shown below. Please note all fields are mandatory except the Landline number field.

Register new account

Your contact details

---

First name  
First name

Last name  
Last name

Email  
Email

Confirm email  
Email

Mobile number  
Select country code

Landline number  
Select country code

Previous Submit

11. System will prompt you about the 'Super User' as advised in point 2 above, once an email Id is entered. If you are happy with it, please complete the remaining fields and proceed to next step. Otherwise have a conversation in your team/department about it.

Register new account

Your contact details

---

\* First name  
.....

\* Last name  
.....

\* Email  
.....@nationalgrideso.com

Please note that you are the first user to register for this account, and you will be given Superuser access. If that's not you we suggest to quit the registration process and try later on.

\* Confirm email  
Email

Confirm email address

Previous Submit

12. Once all fields are completed, 'Submit' button will become active to submit the registration request.
13. You will receive an onscreen confirmation as below and email to verify your email address used for registration process.

Register new account

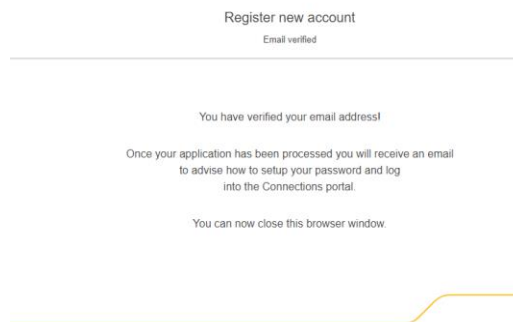
Confirmation

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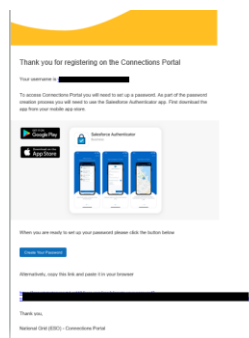
Thank you for submitting your registration.

An email will be sent to you with a link to verify your email address.

14. Please follow the instructions in the email. There are two steps to complete, and these can be completed in any order.
15. First step is to fill the Super User Authorisation form, print on company letter headed paper, get it signed by company authorised signatory and send to [transmissionconnections@nationalgrideso.com](mailto:transmissionconnections@nationalgrideso.com). This will be reviewed by Connection Team to assess the registration request so to ensure that right user is registered against the company.
16. Second step is to verify your email id. Please click on the relevant link in the email for this. Once you have verified the email id, you will see the below message.



17. Once both of the steps are completed by you and Super User Authorisation form has been processed by the Connection Team, you will receive another email containing your username and explaining the process of setting up password. Please follow the instructions in the emails.



18. Please note you will need to download the Salesforce Authenticator application on your mobile device to help with the login process. This also helps with keeping your account safe and secure.
19. You will not need to login into the app by using any email id. Please follow the instruction and app will automatically detect your system login.
20. Once you have downloaded the app, click on the 'Create Your Password' link. Please make sure it meets the minimum requirement as stated and as you start typing, you will see the tick box against these requirements.

**Create a password**

Password

Password

8 characters min.  
Upper case letter  
Lower case letter  
Number  
Symbol

Confirm password

Confirm password

Create password

**Create a password**

Password

Password

8 characters min. ✓  
Upper case letter ✓  
Lower case letter ✓  
Number  
Symbol

Confirm password

Confirm password

Create password

**Create a password**

Password

Password

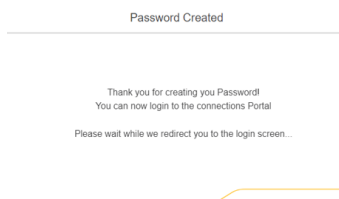
8 characters min. ✓  
Upper case letter ✓  
Lower case letter ✓  
Number ✓  
Symbol ✓

Confirm password

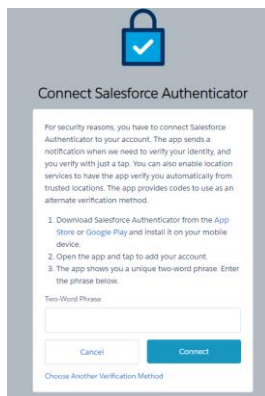
Confirm password

Create password

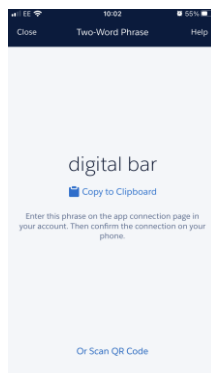
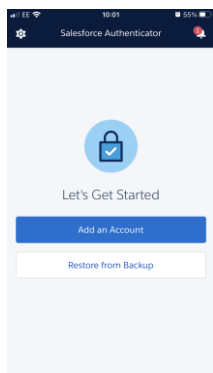
21. Once all required information has been completed, 'Create password' button become active, click to create the password. On successful completion you will be get the following message.



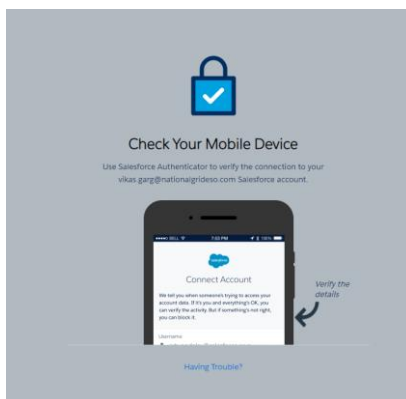
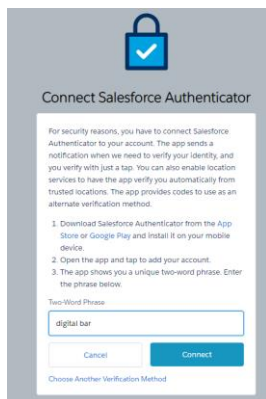
22. Once you are on login screen, enter your username and password that you have just created and click 'Sign in'. You will get the below screen to connect your account to the Sales Force Authenticator app. This will add another layer of security to avoid the risk of unauthorised activities.



23. Open the app. Please note if you are using this app first time, you may get the promotional screen providing you the tour of the app etc. This can be skipped as required.
24. You will then see the below screen. Once you click on 'Add an Account', you will see two words as shown in 2<sup>nd</sup> picture below.

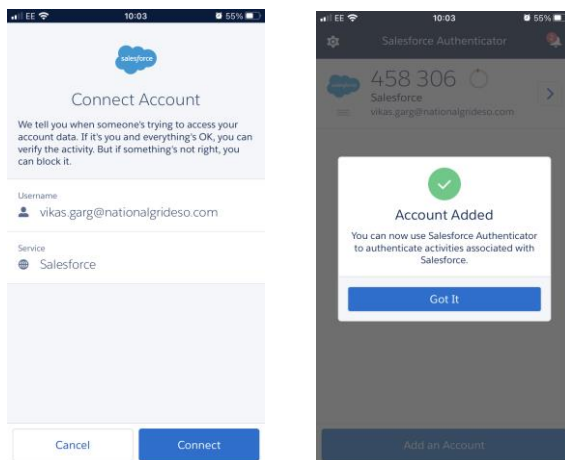


25. Enter these two words in the Portal screen and click 'Connect'. You will then see the 2<sup>nd</sup> picture as below.

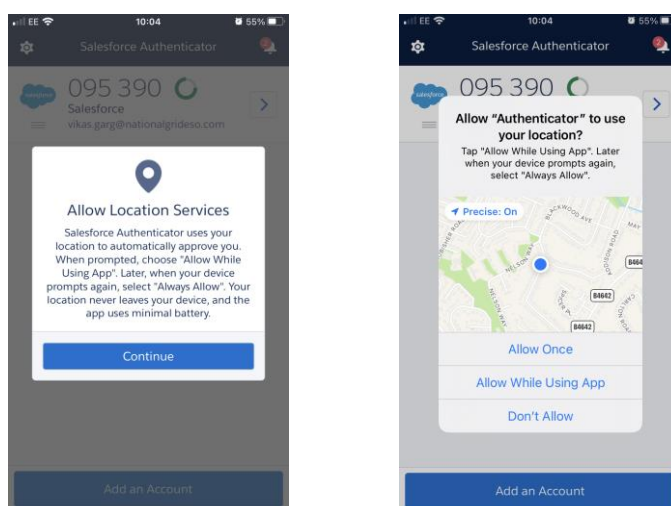




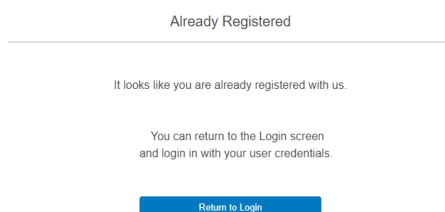
26. Go back to the app in your phone and click 'Connect'. You will note that app has automatically has your details to connect to. Once connected, you will see the confirmation as shown in 2<sup>nd</sup> picture.



27. App also provide an option to automatically approve the login by tracking your location. This can be switched on as needed. Please see some pictures below.



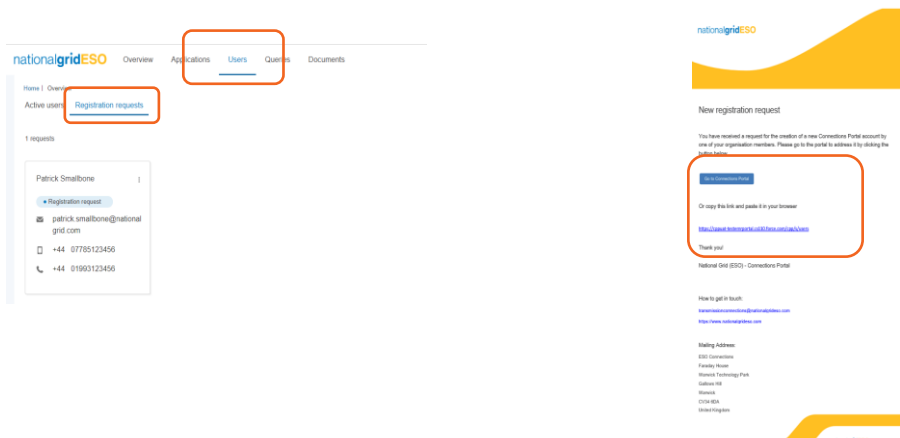
28. You are all set up and ready to use the Connection Portal.
29. Please note that currently an email address can only be used once for registration. So, if you try to register again using an email address, that has already been used, you will see the below error message.'



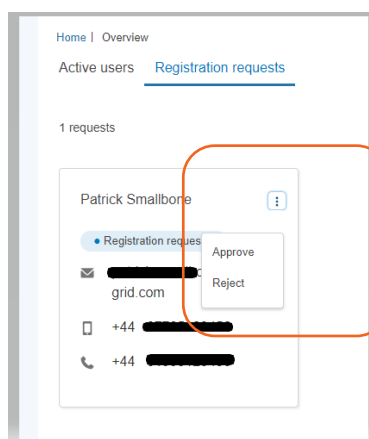
30. Once Super User is active for an organisation, other users can submit the registration requests following the same steps as mentioned above. These requests will be reviewed and approved by Super User of the organisation.
31. Please see the below section how Super User can process these requests.

## Standard User Management

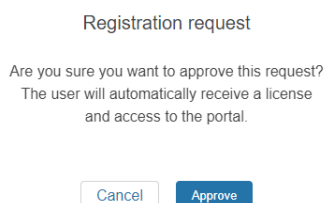
32. Super user will see all the pending requests from other users under the 'User' sections of the portal as shown below (1<sup>st</sup> picture).



33. Super user will also receive an email (2<sup>nd</sup> picture above) about this and click on the link in the email to go to the request.
34. To Approve/Reject the registration request, click on the three-dot menu on the top right of tile and then select the relevant option.



35. To approve the registration, select 'Approve' and you will see the below message. Click 'Approve' to proceed or 'Cancel' to go back



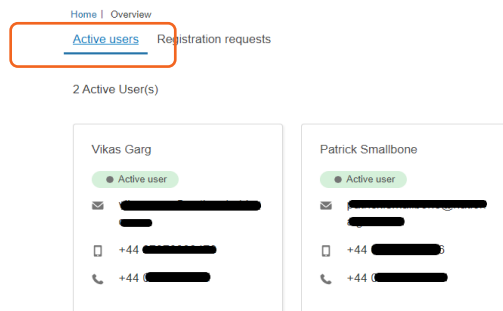
36. Once approved, you will see the confirmation message and advise about remaining licences. User will also receive an email for to complete the registration process e.g., password creation etc.

## Registration accepted

You have successfully accepted the registration request.  
You now have 3 license remaining.

[Go to Users page](#)

37. Super user will also be able to view all the users registered under 'Active User(s)'



38. When you click 'Reject', you will see the following window to add the reason for rejection.

Registration rejection

---

You are rejecting Patrick Smallbone's registration request.

Please select the reason below.

Reason for rejection

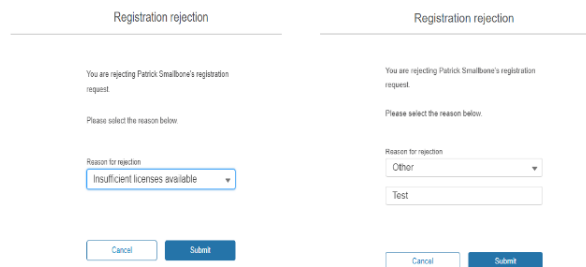
Reason for rejection ▼

[Cancel](#) [Submit](#)

39. Select the reason from the drop-down list. There are currently two options in this dropdown as below

- Insufficient licences available – This is when you already have total of 5 user (including super user) registered for the account.
- Other – This will open a new free text box field for you specify the reason.

40. Please select appropriate option and click 'Submit' to complete the process.



41. You will receive confirmation message as below. This will advise how many licences are still available. This will also send an email to user advising the rejection.

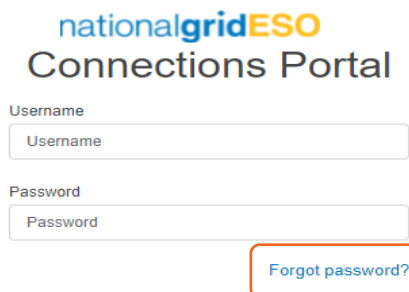
### Registration rejected

You have successfully rejected the registration request.  
You still have 4 licenses remaining.

[Go to Users page](#)

## User login help

42. If you need to request password, please use the 'Forgot Password?' link.

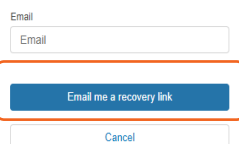


43. Enter the email address and click 'Email me a recovery link'. Once you have received an email, follow the instruction to reset your password.

### nationalgridESO Connections Portal

Forgot your password?

Enter the email address associated to your account



44. If you need help with the Customer Portal, you can use the 'Need help?' function. Clicking on it will create an email which can be used to explain the area of help.

nationalgridESO  
Connections Portal

Username  
Username

Password  
Password

[Forgot password?](#)

☐ Remember me

Sign in

Register new account

[Need help?](#)





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**nationalgrid**ESO