



## Illinois Shines/Adjustable Block Program Portal Help Guides: Batching

Last updated: October 28, 2022



# Topics

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- **Manage** your batch list
- **Create, edit, and submit** a batch
- **Pay** your batch fees

*Please note:*

The Batches functionality is only available to **Vendors** (AVs).



# Getting started: Logging in

**Sign in**

Username

yourusername

Password

.....

**Sign in** [Forgot Password](#)

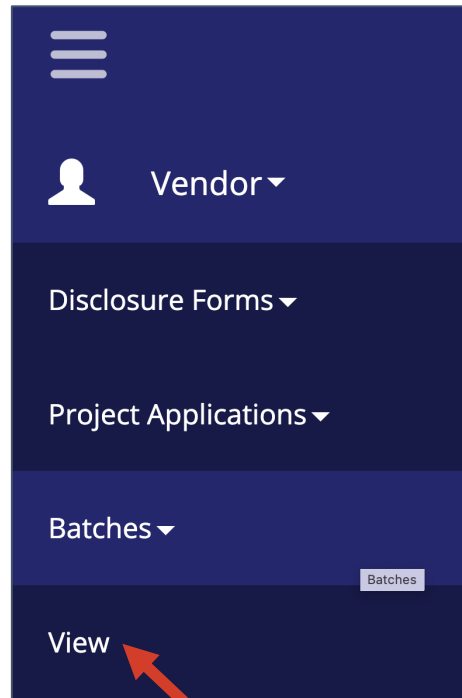
**Step 1:** In your browser, navigate to <https://portal.illinoisabp.com/>

**Step 2:** Enter your registered username and password.

- Usernames are *case-sensitive*.
- If you don't remember your password, select the "*Forgot Password*" link and follow the prompts.
- Contact Support for further help at [admin@illinoisabp.com](mailto:admin@illinoisabp.com)

**Step 3:** Select "*Sign In*" to be taken to your Dashboard.

# Getting started: Batches menu

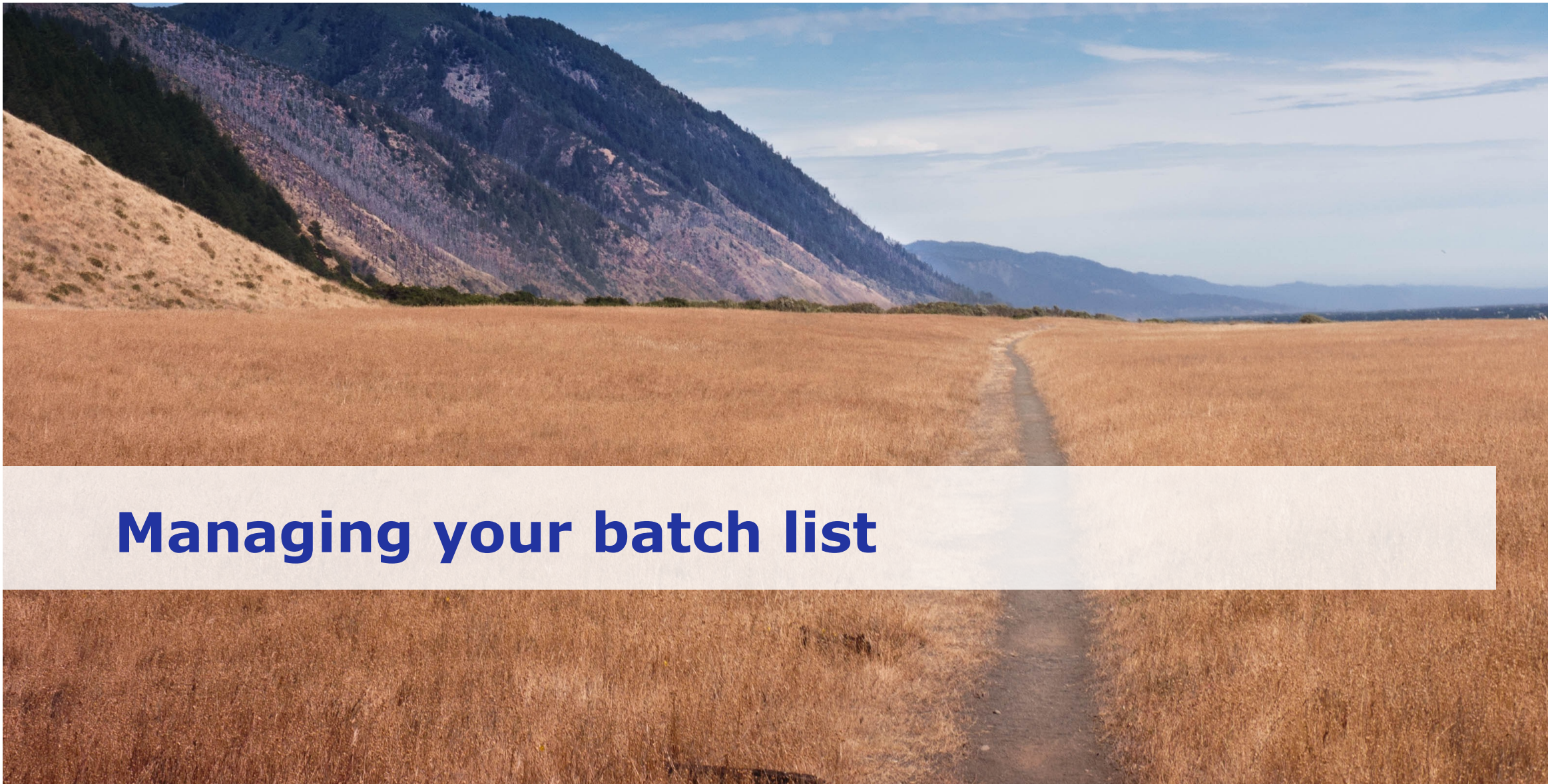


**Step 4:** In the **left** menu, expand the Vendor role and then the “*Batches*” functionality. Then select the “**View**” task.

**Step 5:** (If prompted) Select a Vendor from the list in the pop-up window. When it’s highlighted, select the “*Proceed*” button.







# Managing your batch list




# Managing your batch list: Overview

Search bars: filter by column criteria

Show/hide columns

Create a **new** batch

Create Batch

Vendor ID	Batch ID	Batch Type	REC Contract Type	Status	Exported to Stripe UTC	Actions
1134	20018	DG	20 Year Contract	Created		
4	20017	CS	15 Year Contract	Pending Payment	10/28/2022	
4	470	CS	20 Year Contract	Approved		

Edit batch

List of previously created batches

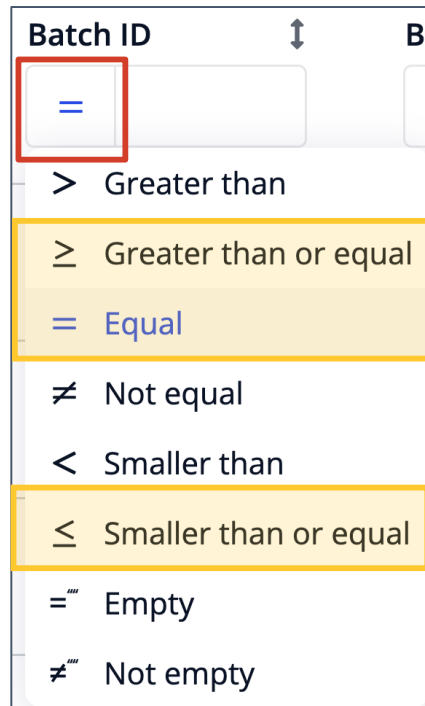
View batch

1 to 4 of 4

# Viewing your batch list

Use the search bars at the **top** of each column to filter your list of batches.

- The portal will search all of your batches.
- You can search/filter multiple columns simultaneously.



The image shows a dropdown menu for filtering 'Batch ID'. The menu is open, showing several options. The top option is an equals sign (=), which is highlighted with a red box. Below it are options for 'Greater than', 'Greater than or equal', 'Equal', 'Not equal', 'Smaller than', 'Smaller than or equal', 'Empty', and 'Not empty'. The 'Equal' and 'Smaller than or equal' options are highlighted with a yellow background.

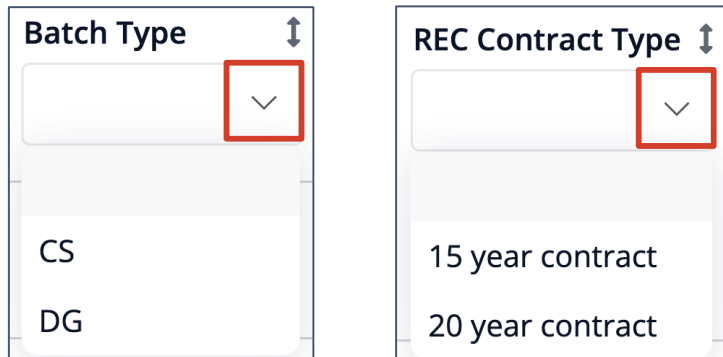
- Batch IDs are numbers.
- Select the **left** button to try other match criteria.

Useful options:

- = You know the **exact** batch ID you need
- ≥ Find more recent batches (**higher** numbers)
- ≤ Find older batches (**lower** numbers)



# Viewing your batch list

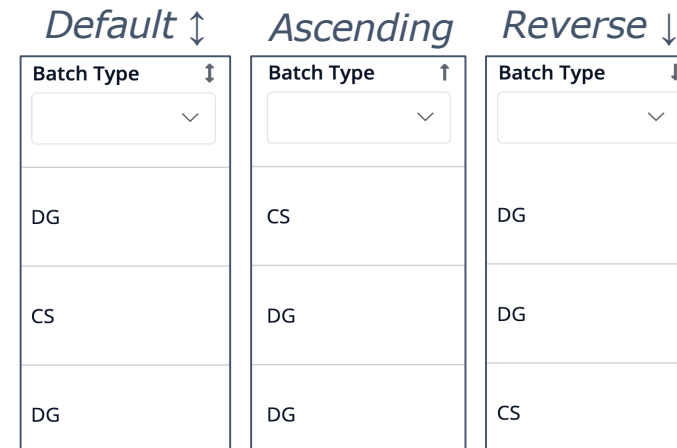


*Dropdowns:* Select the down arrows to see your options.

CS – Community Solar  
DG – Distributed Generation

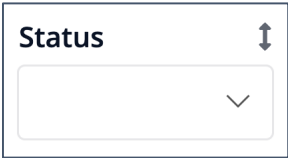
## *Sorting the table*

By default, batches are listed in order of creation. Select an arrow to the **right** of any column to sort by that column in default, ascending, or reverse order.

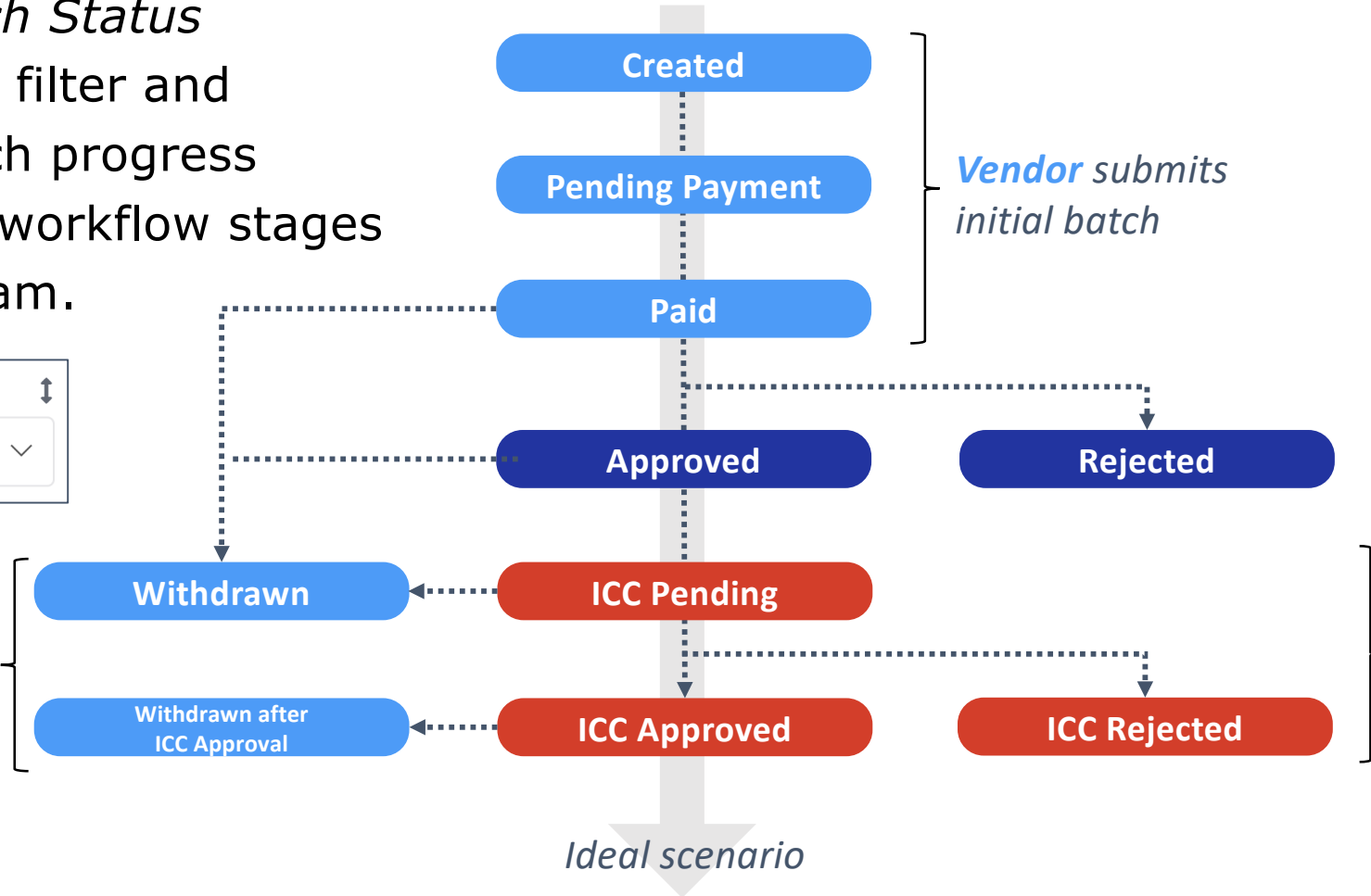


# Viewing your batch list

Use the *Batch Status* dropdown to filter and monitor batch progress through the workflow stages of this diagram.



*Vendor withdraws all applications in batch*



*PA works with Vendor to qualify and/or rebatch*

*ICC reviews batches every 2 weeks*



# Creating and editing batches



# Creating a new batch

**Step 1:** From the Batches > **View** task, select the “*Create Batch*” button at the **top right** of the dashboard.

**Step 2:** In the pop-up window:

- Use the radio buttons to choose the project type to be batched (Distributed Generation or Community Solar) and the REC contract length.
- Select a Vendor number from the dropdown.
- Select the “*Create Batch*” button. You’ll be sent to a page for your new batch.


The screenshot shows a 'Create Batch' pop-up window with the following elements highlighted by green boxes and arrows:

- A 'Create Batch' button in the top right corner of the dashboard, with an arrow pointing to the 'Batch Type' section.
- A 'Batch Type' section containing two radio buttons: 'DG' (selected) and 'CS'.
- A 'REC Contract Type' section containing two radio buttons: '15 Year Contract' and '20 Year Contract'.
- A note below the contract types: '\* 20-year contract includes Public Schools and Traditional Community Solar'.
- A 'Vendor' dropdown menu with a downward arrow icon.
- A 'Create Batch' button at the bottom left of the pop-up window.

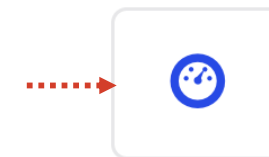
# Resuming a batch

(Skip to the next page if you've just created a new batch)

**Step 1:** From the Batches > **View** task, find the batch you want to work on (use the search bars if it helps.) Select the *"Edit"* button under the Actions column.

Batch ID	Batch Type	REC Contract Type	Status	Exported to Stripe UTC	Actions
<input type="text" value="="/> 20018	<input type="text" value=""/> DG	<input type="text" value=""/> 20 Year Contract	<input type="text" value="Created"/> <b>Created</b>		

If you see this *"View only"* button, the batch can't be edited. This may be because the batch is locked after being submitted, or because the batching function is not yet available.



# Editing a batch: overview

Select intended payment method from dropdown

Fee/total size calculators  
*Updated in real time*

Save and exit

Finalize batch

Exit w/o saving

Search bars

Save & Calculate Submit Back

Show/hide columns

Eligible projects  
- Matching type  
- Submitted status  
- Not already in batch

Add/remove projects from batch

Visible vs. total number of eligible projects; page control

**Batch 20017**  
Status: **Created**  
Batch Type: CS  
REC Contract Type: 15 Year Contract

Payment type (required):  
ACH  
Check  
CreditCard  
WireTransfer

Batch Fee: **\$5000.00**  
Total Size: **2000 kW**  
Project Count: **1**

Vendor ID	Project Type	Disclosure ID	Project Application ID	Project Name	Part 1 Status	
9	CS		93248	Batch3	Submitted	Remove
	CS		93247	Batch2	Submitted	Add
	CS		93246	Batch1	Submitted	Add

1 to 3 of 3





# Editing a batch: step by step

**Step 1:** Go to the Batch edit page by creating a new batch or resuming a “Created” batch. The table below the search bars lists all projects that are eligible for the batch.

## What if I don't see the project I want?

Confirm that the project:

- Is under the Vendor you selected
- Has a Part I App in the **Submitted** state
- Has **not** been added to a different batch
- Matches the current batch type (DG or CS)
- Matches the current REC contract type
  - 20 year: Public Schools or Traditional Community Solar
  - 15 year: All others

# Editing a batch: step by step

**Step 2:** For each row, select the "+Add" button to include that project in the batch and the "xRemove" button to take the project back out. The **Batch Fee** and the **Total Size** will recalculate after each change.

*How do I know if a project has been included?*

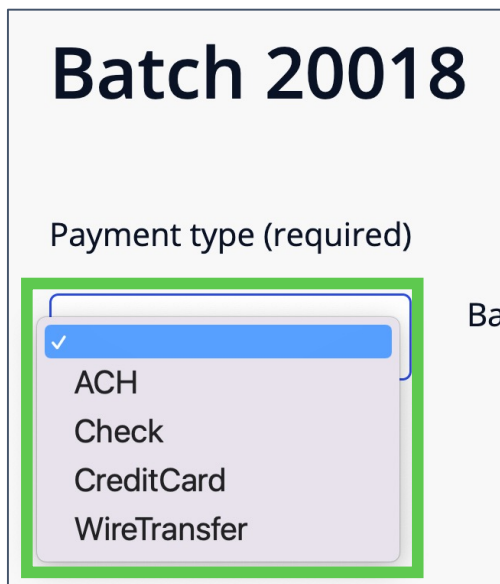
The easiest way is to associate the button with a status:

9	CS	93251	test12	Submitted	<input type="button" value="x Remove"/>	= <i>Included</i>
9	CS	93251	test12	Submitted	<input type="button" value="+ Add"/>	= <i>Excluded</i>

You'll also see the Batch Fee and Total Size calculators update as you add and remove projects.

# Editing a batch: step by step

**Step 3:** Select your intended payment method for this batch from the dropdown at the **left** side of the workbench, below the Batch ID.



Batch 20018

Payment type (required)

Payment type (required) dropdown menu options:

- ACH (selected)
- Check
- CreditCard
- WireTransfer

You'll be able to pay the batch fee *after* you finalize and submit the batch.

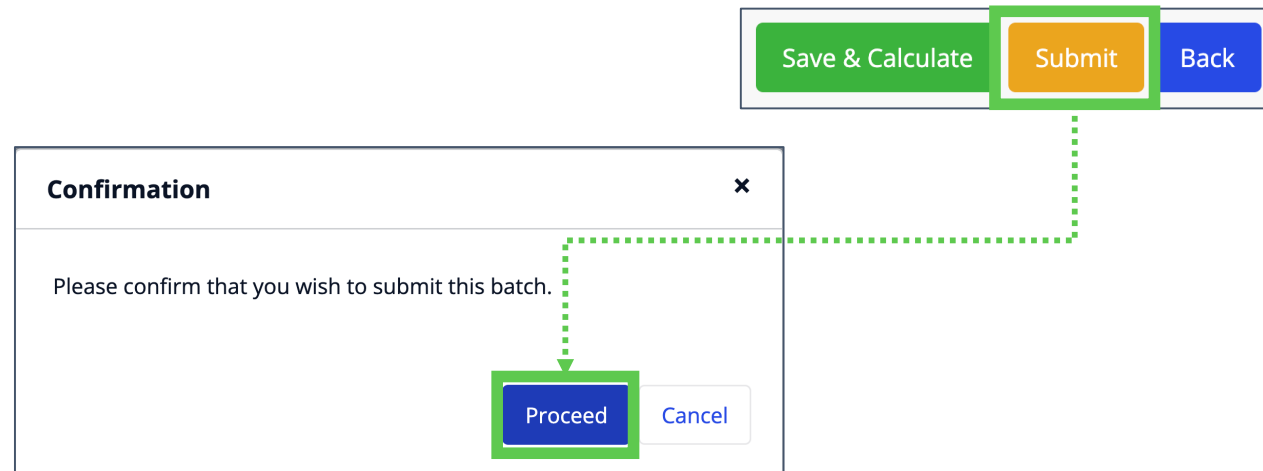
Jump to "[Paying your batch fees](#)"

Please note that credit card payments (only) are subject to a 2.9% credit card processing fee, which will increase your final total.



# Editing a batch: step by step

**Step 4:** When you're done with adding projects, select the "Submit" button **above** the table, and then "Proceed" in the Confirmation window. This saves your batch.

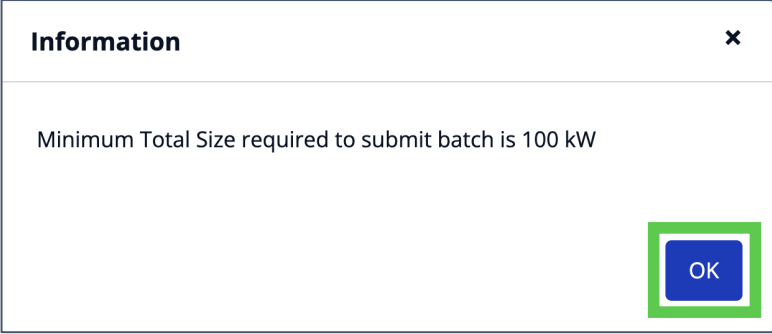


If you're not ready to move ahead, select the "Save & Calculate" button to save your changes for later, and/or select the "Back" button to go back to the Batch View dashboard.

# Editing a batch: step by step

If your batch has a problem (such as an ineligible size), you'll see an explanation when you attempt to Submit. Select "OK", make additional changes, and resubmit.

**Step 5:** If you selected "Credit Card" as your Payment Type in Step 3, the portal will inform you of the 2.9% credit card processing fee and the resulting final batch fee amount. Select "Confirm" to proceed with the credit card payment. Select "Cancel" to choose a different payment method.

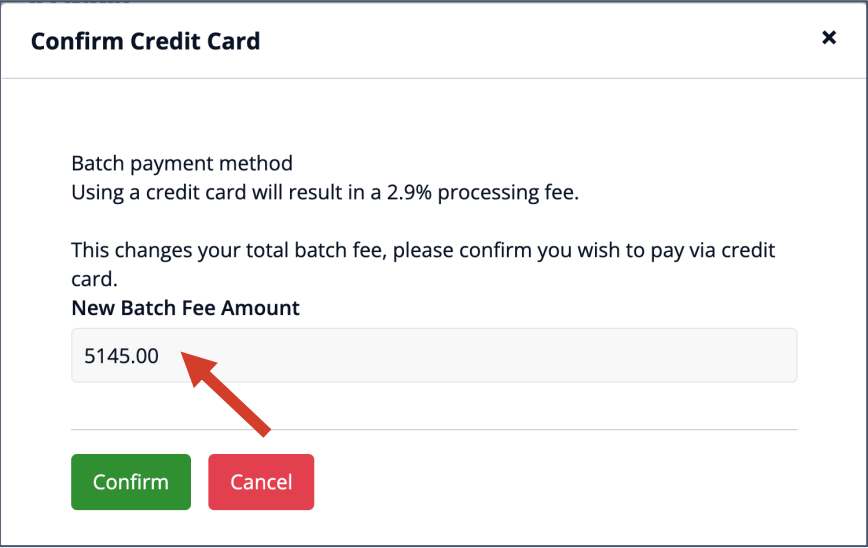


Information

Minimum Total Size required to submit batch is 100 kW

OK

This is a screenshot of an 'Information' dialog box. The title bar says 'Information' with a close button (x) on the right. The main content area contains the text 'Minimum Total Size required to submit batch is 100 kW'. In the bottom right corner, there is a blue button with the text 'OK' inside, which is highlighted with a green rectangular border.



Confirm Credit Card

Batch payment method  
Using a credit card will result in a 2.9% processing fee.

This changes your total batch fee, please confirm you wish to pay via credit card.

New Batch Fee Amount

5145.00

Confirm Cancel

This is a screenshot of a 'Confirm Credit Card' dialog box. The title bar says 'Confirm Credit Card' with a close button (x) on the right. The main content area contains the text 'Batch payment method Using a credit card will result in a 2.9% processing fee.' followed by 'This changes your total batch fee, please confirm you wish to pay via credit card.' Below this is a label 'New Batch Fee Amount' and a text input field containing the value '5145.00'. A red arrow points to the input field. At the bottom, there are two buttons: a green 'Confirm' button and a red 'Cancel' button.

# Editing a batch: step by step

**Step 6:** If you selected “*Credit Card*” and then “Confirm”, or if you selected any other payment method, you’ll receive a payment confirmation message informing you of next steps.

Select “OK” to return to your Batches dashboard. Your Batch will now have “Pending Payment” Status and be view-only.

**Information** ✕

Batch submitted successfully!

You will receive an email from our payment processor Stripe within 1 business day with batch payment instructions.

The batch status will update to "Paid" once your payment is confirmed.

Please contact [admin@illinoisabp.com](mailto:admin@illinoisabp.com) if you have any questions.

**OK**

20026	CS	A	<b>Pending Payment</b>	
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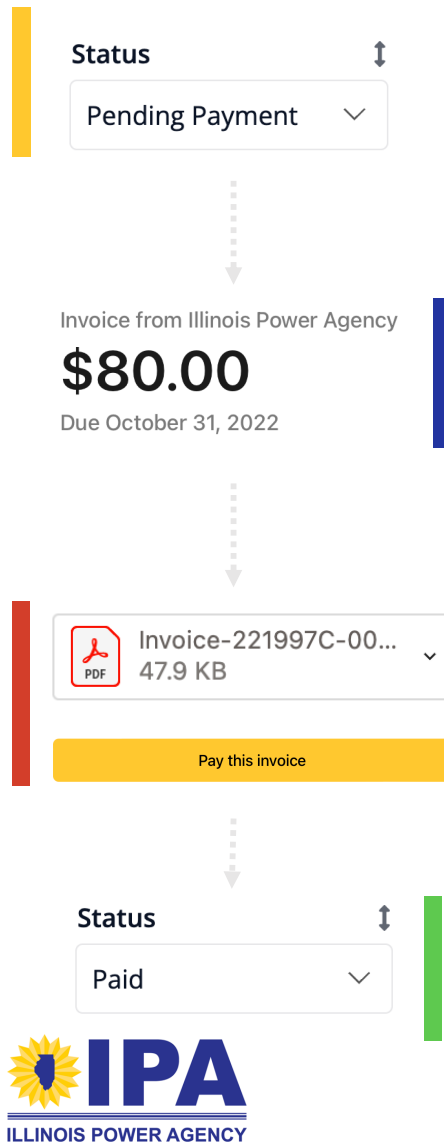




## **Paying your batch fees**



# Paying your batch fees: workflow



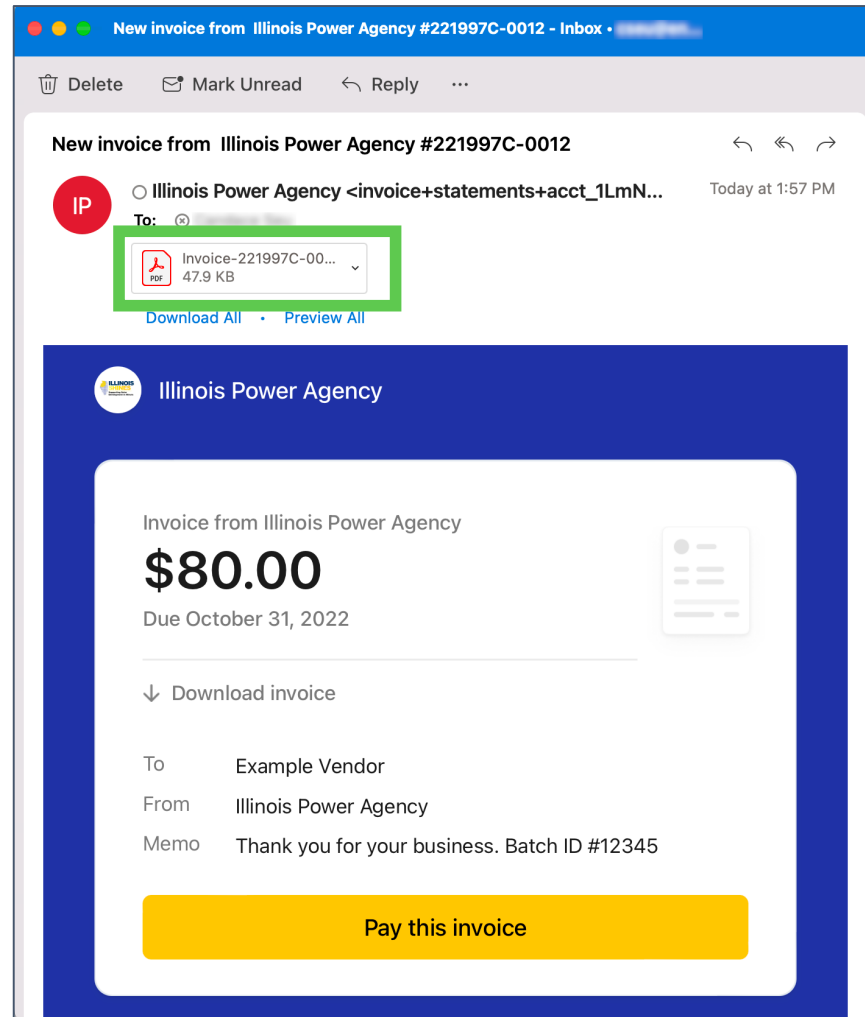
After you've **submitted a batch**, the batch status will change to "Pending Payment".

Within 1 business day, you should **receive an email** via Stripe, our payment processor, with the subject "New invoice from Illinois Power Agency". *Be sure to check your Spam folder if you don't see this email.*

Open the attached invoice for details and **check payment** instructions; or select "*Pay this invoice*" to **pay online**. *Fees must be paid within 10 days (15 day grace period).*

The batch status will update to "Paid" once we confirm your payment (generally within **2 business days** of receipt).

# Paying your batch fees: payment options



*To pay by check*

**Step 1:** Find and open the batch fee Invoice email from Stripe.

The **From:** field will name the Illinois Power Agency, but the email address will end in @stripe.com

The body of the email will show a Memo field with your Batch ID.

**Step 2:** Double-click the Invoice attachment (PDF) to open it.

*Your computer may look different from this example, depending on your operating system and email program.*



# Paying by check (cont.)

**Step 3:** Write a check for the batch fee amount shown in the invoice.

\$80.00 due October 31, 2022

[Pay online](#)

Thank you for your business.  
Batch ID #12345

Description	Qty	Unit price (excl. tax)	Amount (excl. tax)
Batch Fee	1	\$80.00	\$80.00
Subtotal			\$80.00
Total			\$80.00
Amount due			\$80.00

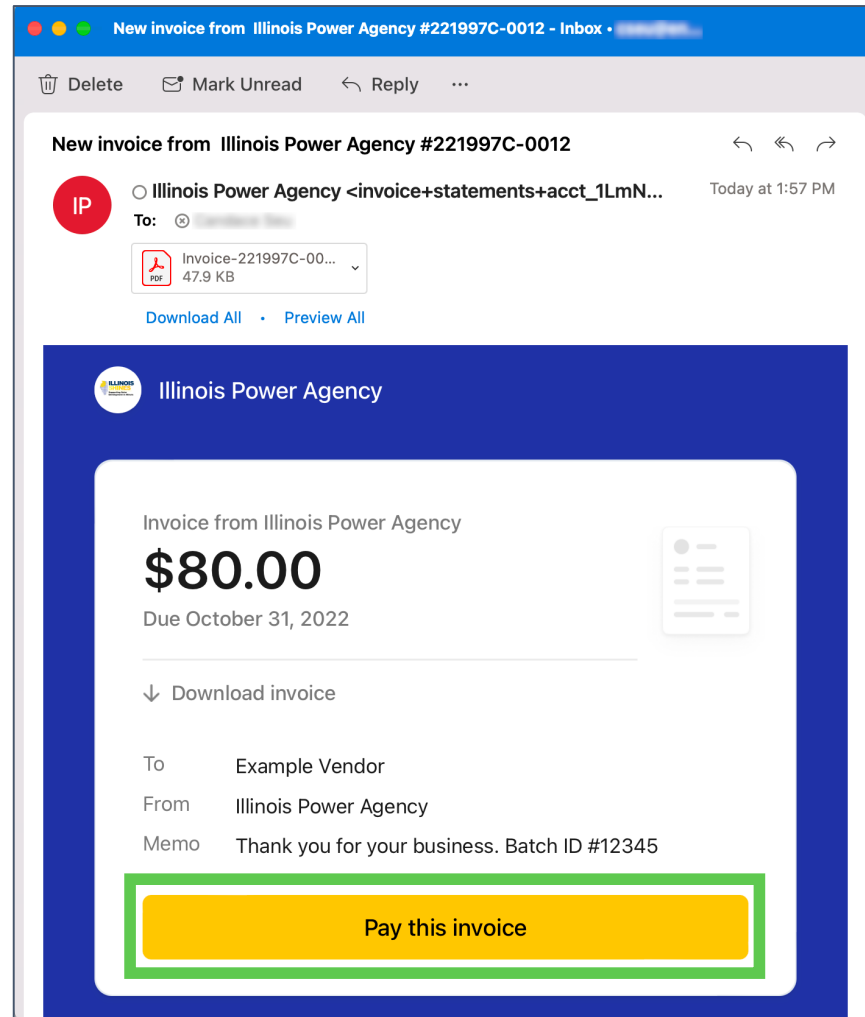
The check must be payable to **Illinois Shines-Cohen Ventures**.

Include the batch ID # in the check memo field.

**Step 4:** Mail the check to: Illinois Shines  
c/o Energy Solutions (IL ABP Program Administrator)  
Attn: Grace Reyes  
449 15th St, Suite 400  
Oakland, CA 94612



# Paying your batch fees: payment options



*To pay by credit card, bank transfer (ACH), or wire transfer*

**Step 1:** Find and open the batch fee Invoice email from Stripe.

The **From:** field will name the Illinois Power Agency, but the email address will end in @stripe.com

The body of the email will show a Memo field with your Batch ID.

**Step 2:** Select the "Pay this invoice" button to go to the Stripe website.

*Your computer may look different from this example, depending on your operating system and email program.*

# Paying online via Stripe

**Step 3:** Confirm that you're at an <https://invoice.stripe.com/> URL with the IPA logo at the top. The webpage will show the same batch fee and batch ID# that you saw in the email.

You can select the arrow on the document icon on the right to download a copy of the PDF invoice (the same document that was attached to your email).

https://invoice.stripe.com/i/acct\_1LmNo9CH1AnqtiPy/test\_YWNjd...

ILLINOIS SHINES  
ILLINOIS POWER AGENCY

Illinois Power Agency TEST

**\$80.00**  
Due October 31, 2022

To Example Vendor  
From Illinois Power Agency  
Invoice #221997C-0012  
Memo Thank you for your business.  
Batch ID #12345

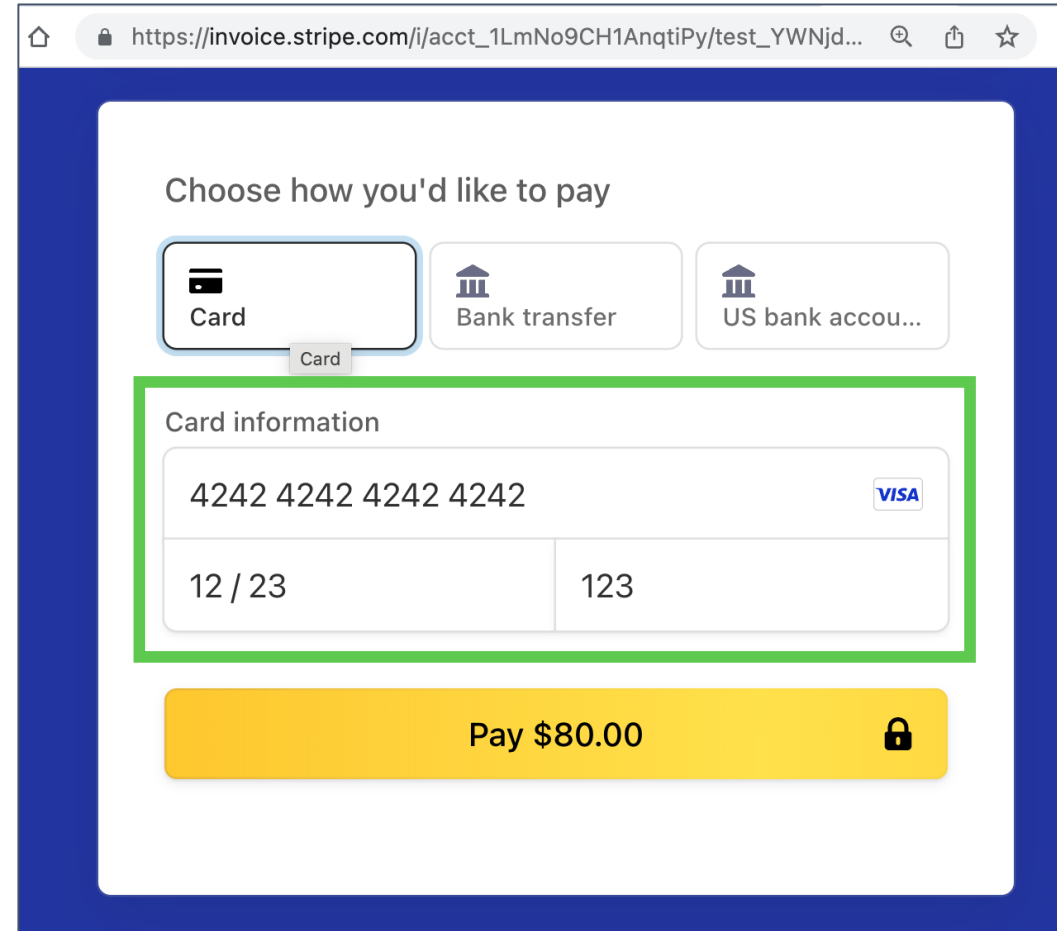
View invoice details >



# Paying online via Stripe

**Step 4:** Scroll down and select your preferred electronic payment option:

- For **card**, enter your credit card information as prompted and select the “*Pay*” button to authorize.

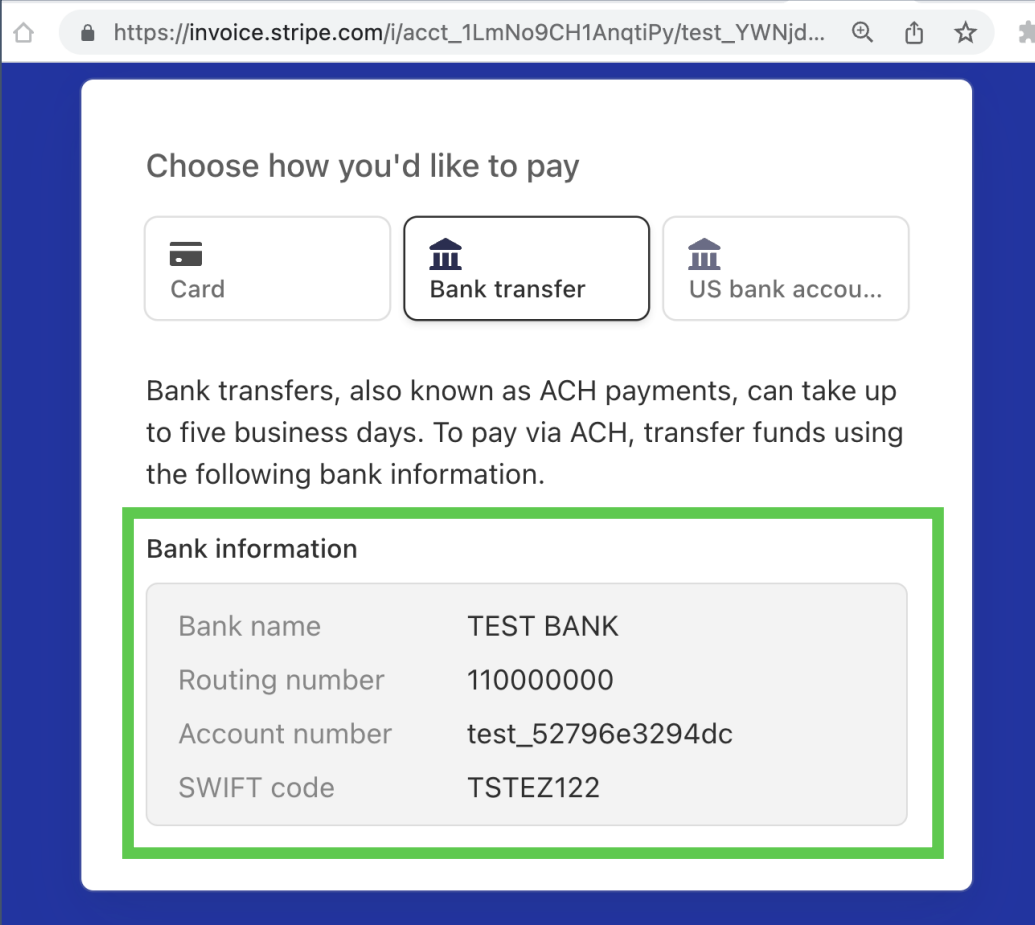


The screenshot shows a Stripe payment page with the URL [https://invoice.stripe.com/i/acct\\_1LmNo9CH1AnqtiPy/test\\_YWNjd...](https://invoice.stripe.com/i/acct_1LmNo9CH1AnqtiPy/test_YWNjd...) in the browser address bar. The page title is "Choose how you'd like to pay". There are three payment options: "Card", "Bank transfer", and "US bank accou...". The "Card" option is selected, indicated by a blue border and a "Card" label below it. Below the payment options is a "Card information" section with a green border. It contains a card number field with "4242 4242 4242 4242" and a "VISA" logo. Below the card number are two fields for the expiration date, showing "12 / 23" and "123". At the bottom of the form is a yellow "Pay \$80.00" button with a lock icon.

# Paying online via Stripe

- For manual **bank transfer** (ACH), you'll need to log in to your bank's website or call your bank to authorize a bank-to-bank (ACH) transaction.

Use the bank information provided on your payment page (*don't use the example information shown here*).



Choose how you'd like to pay

Card Bank transfer US bank accou...

Bank transfers, also known as ACH payments, can take up to five business days. To pay via ACH, transfer funds using the following bank information.

Bank information	
Bank name	TEST BANK
Routing number	110000000
Account number	test_52796e3294dc
SWIFT code	TSTEZ122

# Paying online via Stripe

- For **ACH direct debit**, select the “*US bank account*” option.
- If you haven’t previously linked a bank account to Stripe, you may need to go through the bank verification process as shown.

stripe

TEST DATA

Enter bank account details

Your bank information will be verified with micro-deposits to your account.

123456789 000123456789 1234

Routing number  
123456789

Account number  
000123456789

Your account can be checking or savings.

Confirm account number  
000123456789

Continue

Choose how you'd like to pay

Card Bank transfer **US bank accou...**

Full name  
Example Vendor

Bank account Secured by Stripe

No checking or savings account linked. Please link a checking or savings account to complete this transaction.

Search for your bank

Test Institution Down Bank (unscheduled) Down Bank (unknown error)

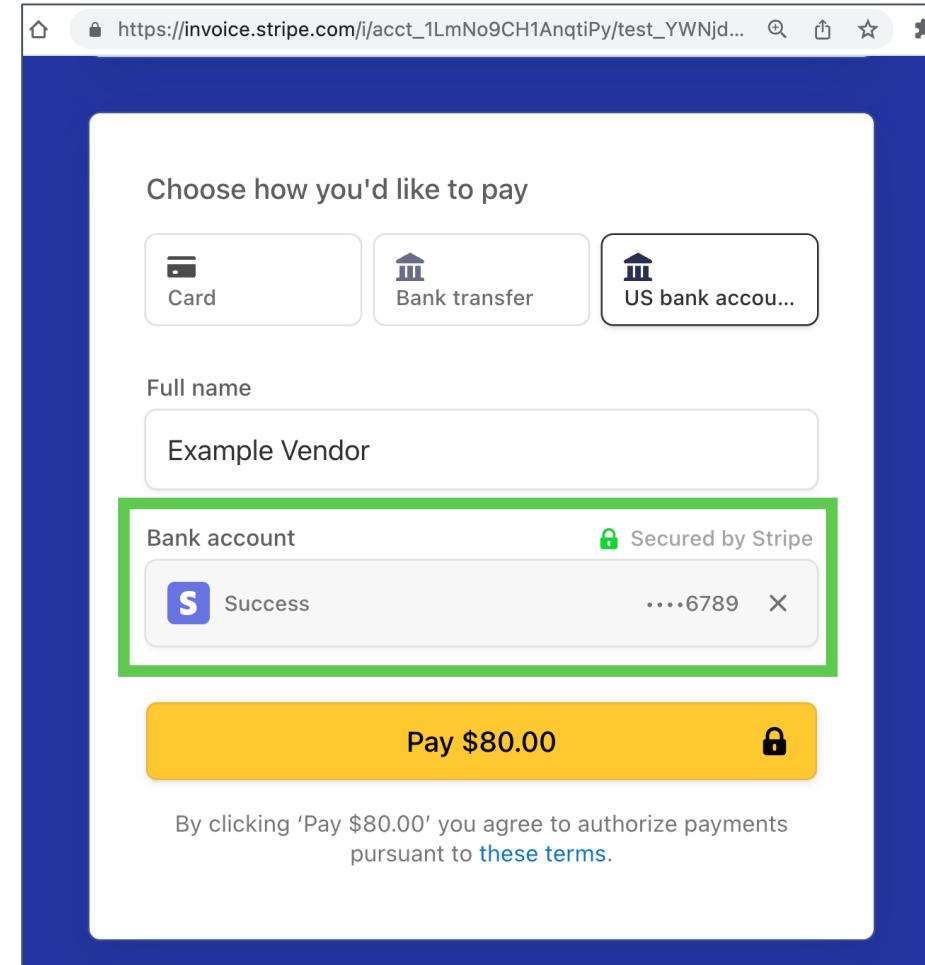
Down Bank (scheduled) Test OAuth Institution Ownership Accounts

**Enter bank details manually instead** (takes 1-2 business days)

Pay \$80.00

# Paying online via Stripe

- For **ACH direct debit**, if you've already linked one or more bank account to Stripe, make sure that the bank account you'd like to pay from is shown in the "Bank account" section, and select "Pay".



The screenshot shows a Stripe payment page with the URL [https://invoice.stripe.com/i/acct\\_1LmNo9CH1AnqtiPy/test\\_YWNjd...](https://invoice.stripe.com/i/acct_1LmNo9CH1AnqtiPy/test_YWNjd...). The page title is "Choose how you'd like to pay". There are three payment method options: "Card", "Bank transfer", and "US bank accou...". Below these is a "Full name" field containing "Example Vendor". A "Bank account" section is highlighted with a green border, showing a success message "Success" with a blue 'S' icon and a lock icon, indicating it is "Secured by Stripe". The account number is partially visible as "...6789". Below this is a yellow "Pay \$80.00" button with a lock icon. At the bottom, there is a disclaimer: "By clicking 'Pay \$80.00' you agree to authorize payments pursuant to [these terms](#)."

# Paying online via Stripe

**Step 5:** If you were able to pay with an automatic payment option (**card** or **ACH direct debit**), you'll see a payment confirmation page. Select the "*Download receipt*" button to get a PDF receipt confirming the payment date and method for your records.

Receipt	
Invoice number	221997C-0012
Receipt number	2961-7397
Date paid	October 21, 2022
Payment method	Visa - 4242

https://invoice.stripe.com/i/acct\_1LmNo9CH1AnqtiPy/test\_YWNjd...

ILLINOIS POWER AGENCY TEST

Invoice paid  
**\$80.00**  
View invoice details >

Invoice number 221997C-0012  
Payment date October 21, 2022  
Payment method Visa •••• 4242

Download receipt  
Download invoice



## Post-payment next steps

If you opted to pay via check or manual bank transfer, please allow additional time for mailing and processing. The Program Administrator will confirm your payment once it arrives and update your Project Status to Paid.

As vendors submit, the capacity in each block will be allocated. The program administrator will regularly update the capacity status of each block on the IL ABP website.

To view the capacity status, visit:

<https://illinoisabp.com/block-capacity-dashboard/>

*"Detailed Program Data"*

# Questions?

Contact Program Administration Support:

[admin@illinoisabp.com](mailto:admin@illinoisabp.com)

877.783.1820

