

# **2023-2024**

## **ALL DISCLOSURE FORMS (DG AND CS)**

### **CSV BULK UPLOAD WALKTHROUGH**



A PORTAL HELP GUIDE  
LAST UPDATED: MAY 30, 2023



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## Table of Contents

<b>Table of Contents.....</b>	<b>2</b>
<b>Overview.....</b>	<b>3</b>
Program context .....	3
Bulk CSV Upload.....	3
<b>Getting started: Log in and download the templates .....</b>	<b>4</b>
Log in .....	4
<b>How to use the DF DETAILS template .....</b>	<b>6</b>
Where to enter your data .....	6
Important cells.....	6
Data entry tips .....	8
<b>How to upload the DF DETAILS template to the portal .....</b>	<b>10</b>
“Save As” your template as a CSV file .....	10
Upload your CSV file to the portal.....	13
Understand your results .....	15
<b>Checklist before you upload .....</b>	<b>16</b>
<b>Frequently Asked Questions.....</b>	<b>17</b>
<b>Additional Questions?.....</b>	<b>20</b>
<b>Document History.....</b>	<b>20</b>

## Overview

### Program context

The Illinois Shines Program uses **disclosure forms** (DFs) to capture key information that a customer needs to know about a proposed solar project or subscription before they sign a contract. These DFs must have a standardized format and are usually generated using the Illinois Shines portal at <https://portal.illinoisabp.com/>

Approved Vendors (AVs) and their Designees can generate DFs one at a time using a webpage interface. They can also upload and generate multiple forms in bulk via a CSV upload within the portal, or by connecting to the DF Application Programming Interface (API).

### Bulk CSV Upload

AVs and Designees can download a different CSV template for each type of DF from the portal. The headers (columns) of each template map directly to the questions that appear on the webpage interface.

One row of template data creates one DF. By adding more rows to the template, an AV or Designee can generate multiple DFs in one upload. For example, a **DG Lease** template can be downloaded, filled with multiple rows, and then uploaded in the portal to create multiple **DG Lease** forms at once. The CS, DG PPA, and DG Purchase templates can be similarly and separately used to create multiple CS, DG PPA, or DG Purchase DFs.

The portal provides success/error feedback immediately after upload so that the program participant can access their new DF(s) or, if they receive an error notice, fix their input and try again.

This document guides AVs/Designees on how to use the CSV bulk upload templates for DF creation on the Illinois Shines portal.

### 2023-2024 Program Year DFs

New streamlined and simplified DFs were released on June 1, 2023 for the 2023–2024 Illinois Shines Program Year. New **CSV upload templates** were released on the same day to match the new DFs, and must be used going forward.

#### *Previous versions*

The CSV upload templates that were on the portal prior to June 1, 2023 were used to create DFs for the 2022-2023 program year. These older templates are not compatible with the new forms released on June 1, 2023. Please download and use the new templates from the program portal.

## Getting started: Log in and download the templates

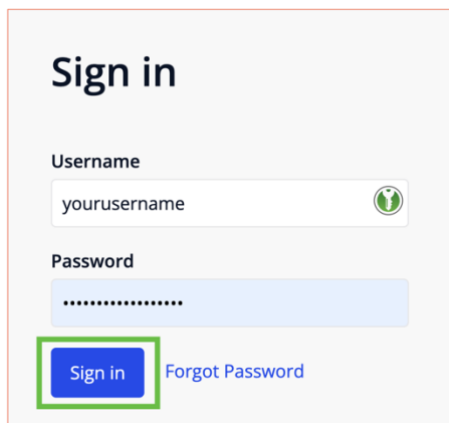
### Log in

This guide assumes that you are already registered as an AV or Designee.

- **AVs:** To learn about the requirements and process for registering as an AV, please visit <https://illinoisabp.com/become-an-approved-vendor/>.
- **Designees:** To become a Designee under an AV, please see the guidelines at <https://illinoisabp.com/become-a-designee/>.

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

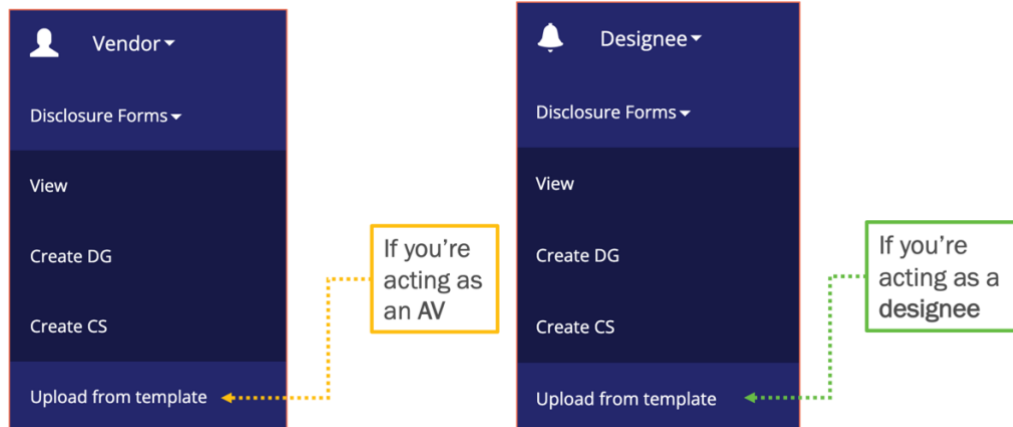
**Step 2:** Under “Sign in”, enter your registered username and password.



- 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)

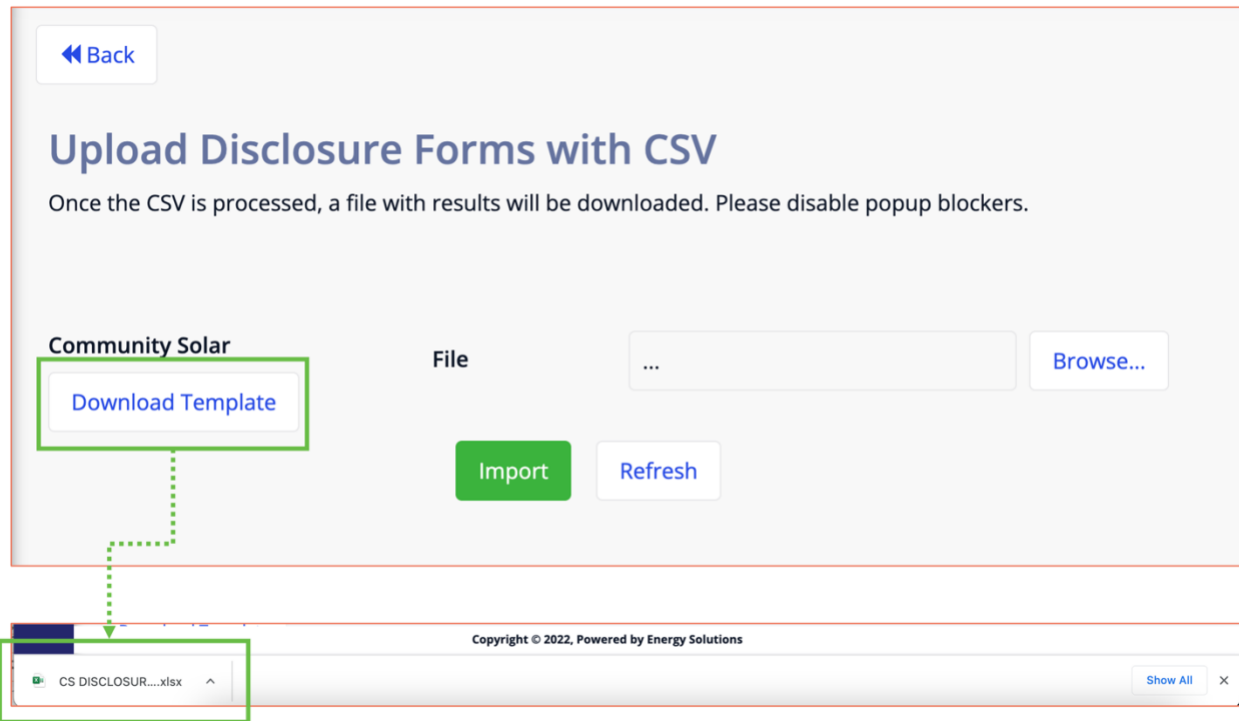
**Step 3:** Select the “*Sign in*” button to be taken to your Dashboard.

**Step 4:** In the left menu, select your active role (Vendor or Designee) to expand its sub-menu. Select the “*Disclosure Forms*” functionality and then select the “*Upload from template*” task.

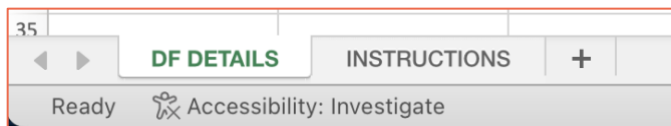


If you're an AV but sometimes work as a Designee for other AVs (e.g., you're an AV and a Designee), you may have access to both sub-menus. Make sure you choose “*Upload from template*” from the correct sub-menu for your current intended role/task.

**Step 5:** A page titled “Upload Disclosure Forms with CSV” will appear. Look for your form type and select the “**Download Template**” button. Your browser should automatically download an **.XLSX** template file to your local computer.



**Step 6:** Open the **.XLSX** file on your computer using any spreadsheet editing program (e.g., Microsoft Excel, Sheets, Google Sheets, LibreOffice Calc). You’ll see one workbook with two tabs (sheets):



- **DF DETAILS** – Template sheet. The blue-shaded row (row 4 or 5 depending on the template) contains the questions for that DF type. The white-shaded row above that contains guidance for each question. You’ll enter your DF data **starting in the first blank row** – see the next section for more details.
- **INSTRUCTIONS** – Provides general instructions on how to use, export, and upload the template.

For a visual walkthrough of questions for all disclosure forms, please refer to the Step-by-Step Disclosure Form Walkthroughs on the Portal Help Guides website:

<https://illinoisabp.com/portal-help/>

## How to use the DF DETAILS template

### Where to enter your data

On the DF Details sheet, each row **starting from the first blank row** (row 6 for the DG forms, and row 5 for CS) corresponds to one DF. Leave all cells in the first column (Column A) blank. In general, you'll enter values in *most* of the columns that have a question. The text of the question is formatted as **bold** and shown in the blue-shaded row.

### Important cells

#### Column A: For portal success/error messages

The first cell of each row (in other words, the first column of the sheet) is **reserved for portal success/error messages**.

After you upload a filled template to the portal, the portal will return a "Response File" that looks very similar to the template file. The first column of the "Response File" will reference the DF data rows you entered and their upload results.

- If you were **successful**: the result will contain your new DF ID.  
*Example: Row: 7 | Form ID: 488808 | Created successfully.*
- If you were **unsuccessful**: the result will be an error message that you can use to troubleshoot and resubmit your form.  
*Example: Row: 6 | Col 2: Project name is required. | Col 3: Customer type is required.*

#### Row 5 (DG) or Row 4 (CS): Lists the DF questions

This row holds the **questions** that will appear on the DF. You'll enter your answer directly below each question for each DF row. When printed or sent out for e-signature, the DF PDF will show these questions and your answers to the customer.

Scroll to the right to see all the questions. You'll need to provide answers for most (but not all) of the questions on the template.

#### Rows 1–4 (DG or Rows 1-3 (CS): For input guidance

- **Row 1 counts the questions** on the form. If there's an issue with your form, the portal will give you an error message that references the numbers in this row.
- **Row 2 describes the type of data** you must enter for that question. The number in parenthesis gives the **maximum length** (e.g., number of characters) your answer can contain.
  - "integer": must be a whole number, usually equal to or greater than zero.

- “decimal”: often used for dollar amounts and percentages. You should omit non-numeric symbols like \$, %, and commas.
- “dropdown”: must be selected from a “dropdown” list. (See [“Using dropdowns”](#) below.)
- “text”: free entry (numbers, letters, and symbols OK)
- “date”: use the format indicated in row 4 (typically yyyy-mm-dd)
- **Rows 3 and 4 (DG) or just Row 3 (CS) indicates:**
  - **Whether an answer is required** (“Yes”), not required (“No”), or conditionally required (“Only if...”).
  - **Allowed answers** in the case where a question only allows certain answers. If the cell in this row says, “Must be one of...” you should use the dropdown arrow on your DF row to choose one of the answers. (See [“Using dropdowns”](#) below.)

If you don’t see the guidance rows (you only see a single row of questions) and there’s only one sheet in the workbook, you may be looking at a **portal response file** (see the section titled [“Understand your results”](#)).

If your goal is to enter data for DFs, **make sure that you’re working with the template file**. Download another copy using the instructions under [“Getting Started”](#).

Always download a new CSV upload template right before you fill it out – this helps you make sure that you have the latest input guidance.

## Data entry tips

### Using dropdowns

Certain questions only allow certain answers. These questions are specially marked in several ways:

1. The “Type” in Row 2 is “dropdown.”
2. The “Validation” guidance in Row 3 or 4 says “Must be one of...” and lists two or more options.
3. When you click on the cell under a dropdown question in the DF row, you see a down arrow on the right edge of the cell.

1	<b>No</b>	2	4	5
2	<b>Type</b>	dropdown	text (200)	text (2
3	<b>Required</b>	Yes	Yes	Ye
4	<b>Validation</b>	Must be one of: "Residential/Small Commercial", "Large Commercial/Industrial", or "Public School"		
RETURNED BY THE SYSTEM DISCLOSURE ID OR ERROR MESSAGE				
5	<b>Customer Type</b>	<b>Customer Name</b>	<b>Street</b>	
6				
7				
8				
9				
10				

The easiest and most accurate way to enter data for dropdown questions is to use the down arrow to choose from the dropdown list.

1. Using your mouse or the keyboard, highlight the cell you want to fill in. The down arrow should appear on the right edge of the box.
2. Open the dropdown list: use your mouse to select the down arrow, or type “ALT” + “Down Arrow” on your keyboard. (“Option” + “Down arrow” on Mac)
3. Use the arrow keys on your keyboard or move the mouse until the option you want is highlighted, then click your mouse or press “Enter”/”Return” to fill the cell.



## How many rows of data can I enter?

The templates are set up with dropdowns so that you can enter DFs **up to row 200**.

If you need to enter more DFs, you have two options:

1. Copy row 200 to additional rows. This will set up the dropdown selections in additional rows.
2. Download or make a copy of the template file and enter your data there.

## Deleting empty rows (optional)

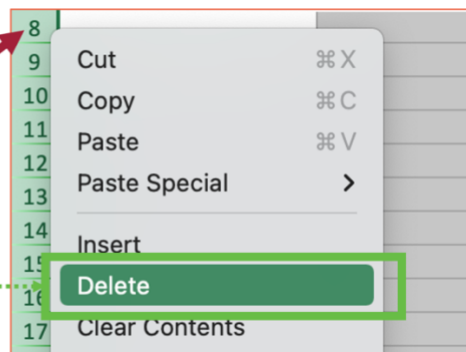
If you're using Excel, when you ["Save as" your template to a CSV file](#), the CSV file will keep data for all rows between 1 to 200 (or more, if you copied row 200 to additional rows as described in "How many rows of data can I enter?")

If you didn't enter data in all of the rows up to row 200, you might see that the CSV (correctly) shows these lower rows as blank. You won't notice this if you try to open the CSV file in Excel, but you may notice it if you open the CSV file in a text editing program (like Notepad or Wordpad). The blank rows will look like a series of commas (" , , , , , , "). This is caused by an issue with Excel.

**The blank rows will not affect your upload!** However, if they bother you, you can delete them:

1. Select all of the empty rows. For example, you can click on the left sidebar on the first empty row, hold "Shift" on your keyboard, and then click on row 200 or below.
2. In the Excel menu, go to File > Edit > Delete. Or using your mouse, right-click to open a menu and select "Delete".

Select your empty rows, then point on this sidebar and right-click to open the menu. Select "Delete."



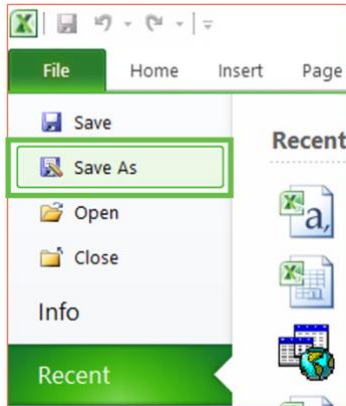
## How to upload the DF DETAILS template to the portal

Use the instructions in this section when you're done filling out the template.

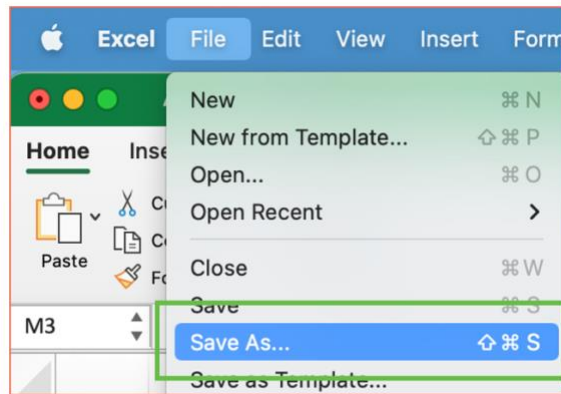
### “Save As” your template as a CSV file

#### Using Microsoft Excel

**Step 1:** While you're on the DF DETAILS sheet, go to the top menu and select File > Save As.



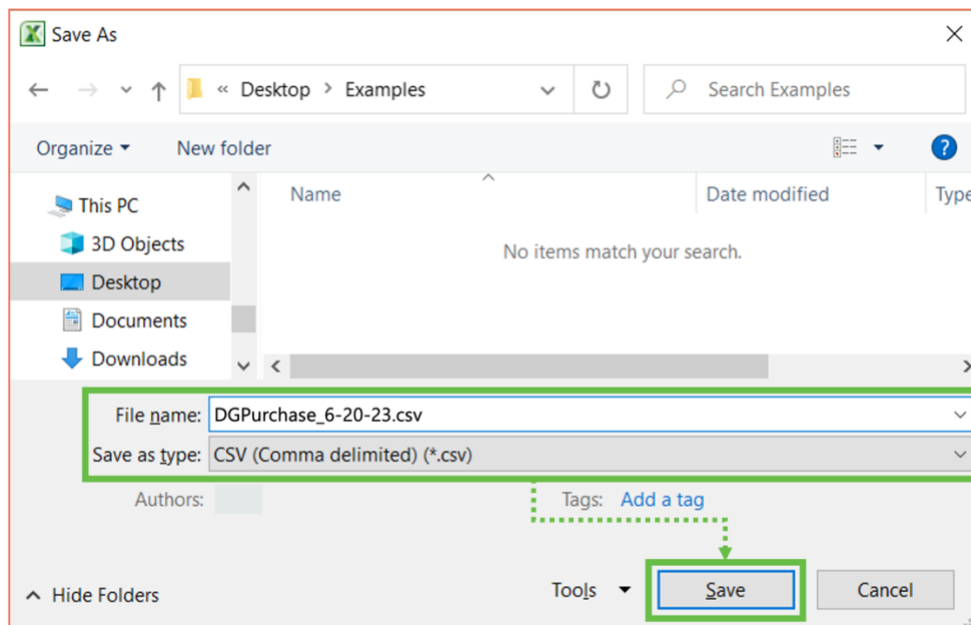
Windows



Mac

**Step 2:** In the “Save As” pop-up window:

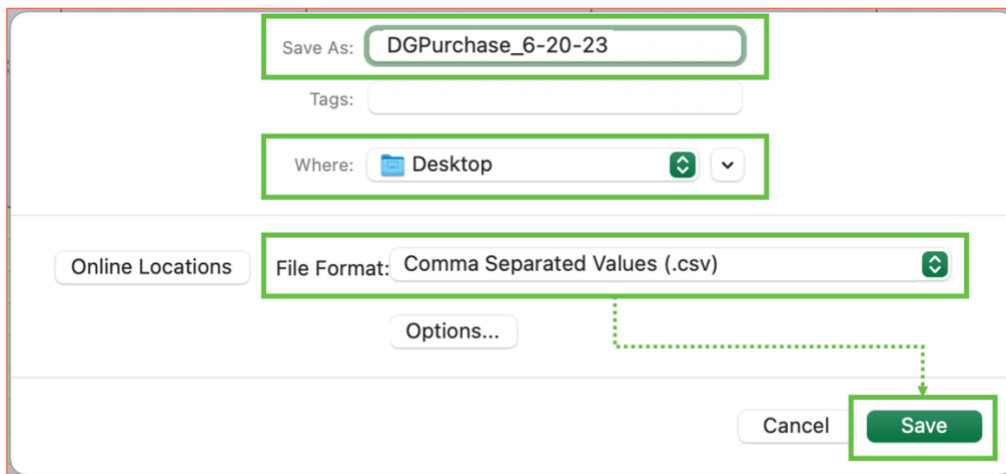
#### Windows:



- **Save destination:** Check where your file will be saved. If needed, change it to somewhere easy to find, like the Desktop.
- **File name:** If needed, edit the filename to something that will help you identify the file later. We recommend that you include the date of upload.
- **Save as type:** (IMPORTANT) Change to “CSV (Comma delimited) (\*.csv)”. (You may have to scroll down the list to find it.)

When you’re ready, select the “Save” button.

**Mac:**

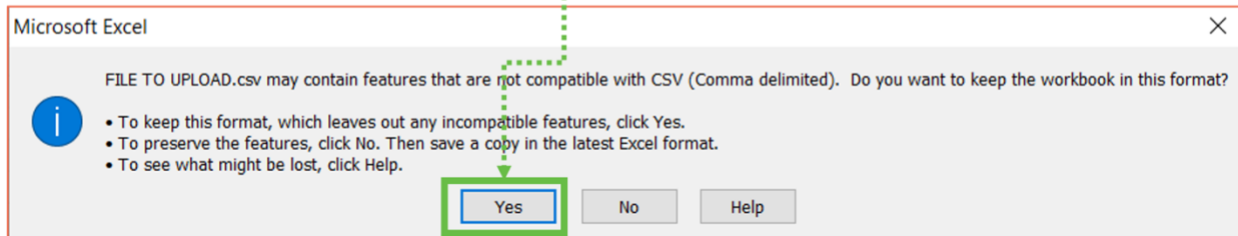
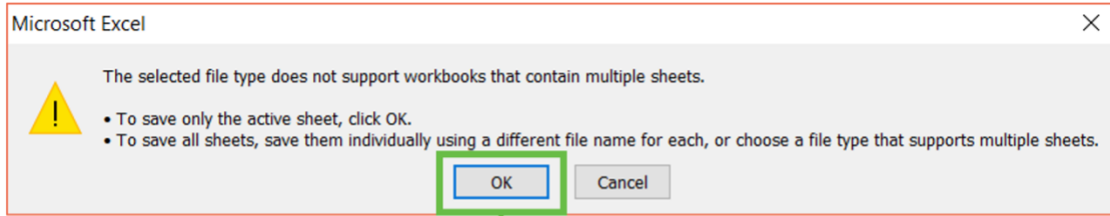


- **Save As:** If needed, edit the filename to something that will help you identify and track the file later. We recommend that you include the date of upload.
- **Where:** Check the file save destination. If needed, change it to somewhere easy to find, like the Desktop.
- **File format:** (IMPORTANT) Change to “Comma Separated Values (.csv)”. (You may have to scroll down the list to find it.)

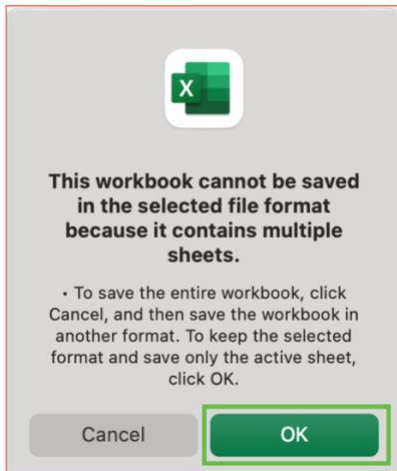
When you’re ready, select the “Save” button.

**Step 3:** A pop-up window or two will ask you to confirm that it’s OK to save *only* the current sheet. Ensure that you’re on the “DF Details” sheet, then select “OK” and “Yes”.

**Windows:**



**Mac:**



**Step 4:** The CSV file should now be saved to your computer. You can go to the “Save As” destination you chose in the Step 2 pop-up to find your upload file and confirm that the save was successful.

*(Optional)* You can open the upload file to confirm that the file has only one sheet and that it contains all your DF data. When you’re done, close the file without saving.



## Upload your CSV file to the portal

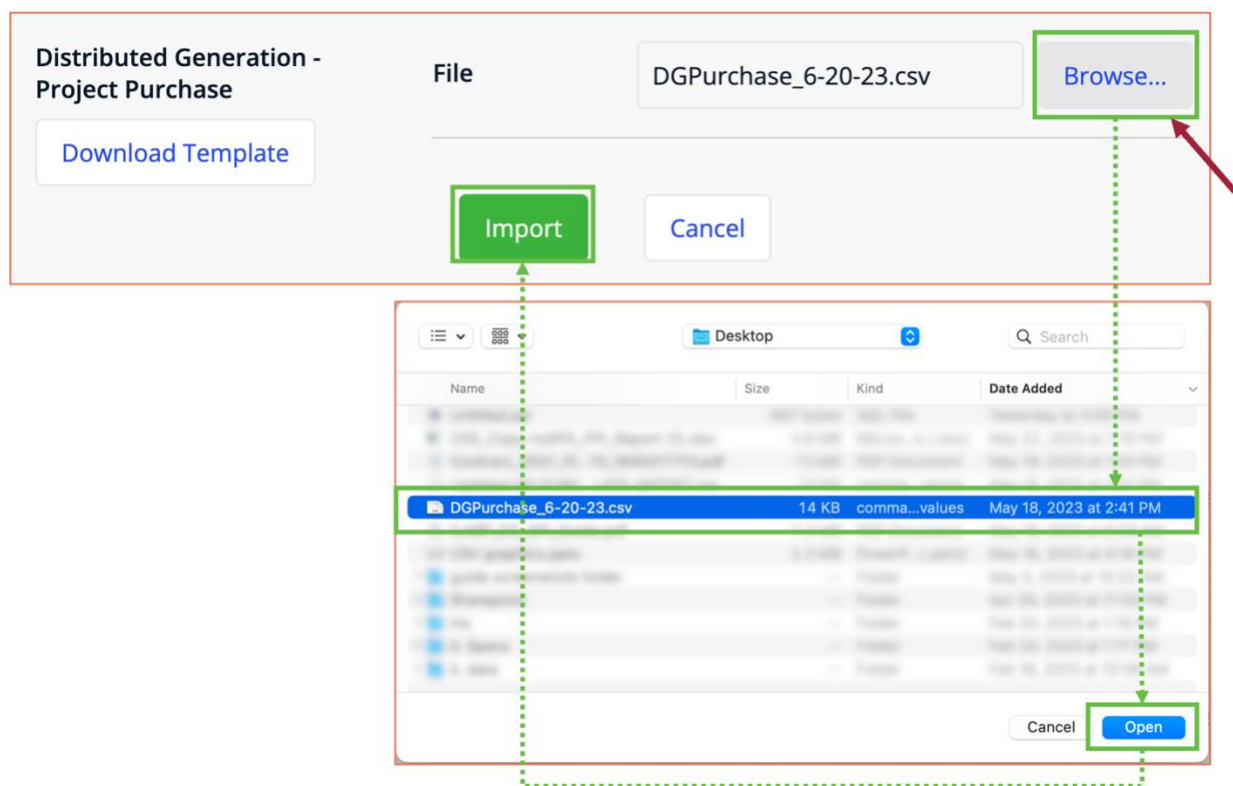
**Step 1:** Log in to the portal at <https://portal.illinoisabp.com/> and navigate back to the Disclosure Forms > “Upload from template” menu item. ([Jump to instructions](#))

**Step 2:** Find the DF type that matches your template file (Community Solar, DG PPA, DG Lease, or DG Purchase). In that section, select the “Browse” button to open a File Search pop-up window. Find and select your template file so that it’s highlighted, and then select the “Open” button.

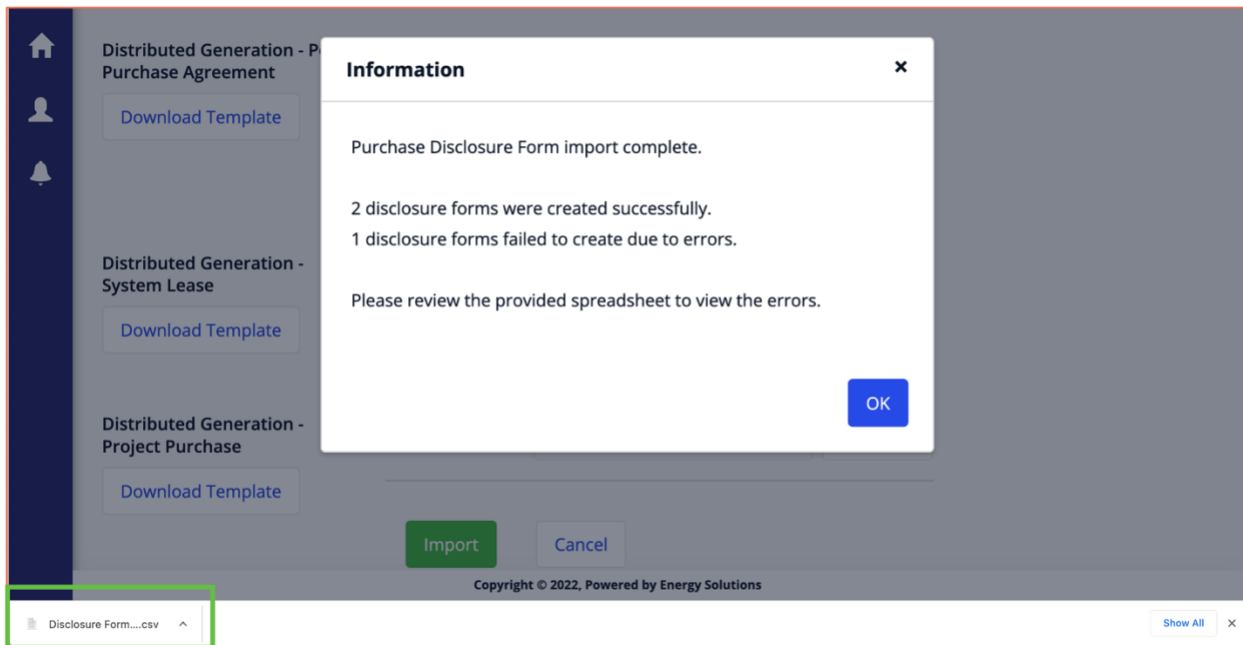
Make sure that the file you choose ends in “.csv”.

The File Search pop-up should close, and the name of your file should appear in the “File” box (next to the “Browse” button).

**Step 3:** Select the green “Import” button to start the upload. A transparent white progress bar will appear on the screen while your data is being uploaded to the portal. This may take a few minutes, especially if many users are online and your file has many rows.



**Step 4:** When your data upload is done, your browser will show an “Information” pop-up window with the results. It will also automatically download a “Response File” CSV with more details. You can click on the “Response File” in your browser’s download bar to read more.



If you can't find your file, check your computer's "Downloads" folder. The file name will include the type of template you used and the date.

(Example: "Disclosure Form Purchase Upload - 05-18-23, 15\_04.csv")

## Understand your results

When you open the CSV “Response File”, you’ll see a sheet very similar to your template file. Here, the first cell of each row (Column A) contains a **portal success/error message for that row’s DF**:

Success message example	What to do
Row: 7   Form ID: 492556   Created successfully.	Your DF uploaded successfully. You can review your form data by going to the DF dashboard for the Vendor ID shown in Column B.

Error message examples	What to do
Row: 8   Col 1 - Current account is not authorized on behalf of this vendor.	Check which vendors you are authorized for by (for example) going to Disclosure Forms > “View”. Review the vendors listed in the pop-up window. The Vendor ID in Col B <b>MUST</b> match one of your listed vendors.
Row: 6   Col 2: Project already exists with this name.	Resubmit this DF row with a different “Project Name” (one that you’ve never used before)
Row: 6   Col 2: Project name is required.   Col 3: Customer type is required.	Enter answers for the required questions/referenced columns.
Row: 6   Col 8: State must be 'IL'.	Make sure that your answer in the referenced column meets the requirements (matches a valid option)

### What if I got an error message?

**Step 1:** Open your original template file (the one with three sheets).

**Step 2:** Delete the rows that uploaded successfully. Make sure that you **delete** rather than just clearing or hiding the rows.

**Step 3:** Fix each row that has an error message (check the “What to do” column in the “Error message example” table above for tips). Note that if one row references multiple columns, there are multiple errors, and you must fix them all.

**Step 4:** “Save As” your edited file as a CSV and upload it again.

**Step 5:** Repeat steps 1–4 as necessary if you receive additional error messages.

## Checklist before you upload

### Did you...

#### *Getting started*

- Download a CSV template for the exact type of DF you want to create?
- Open the template and go to the “DF DETAILS” sheet?

#### *Entering your data*

- Leave Column A blank?
- Enter your DFs row by row in the empty rows (under the questions header)?
- Enter only the ID of an AV you’re associated with in Column B?
- Use the dropdown arrow to enter data for any questions marked “dropdown”?
- Make sure that you provided answers to all the required and conditionally requested questions?
- “Save As” the “DF DETAILS” sheet to a **CSV file** (not an Excel file)?

#### *Uploading your template file*

- Make sure that you’re the template file you selected matches the form type you’re uploading to (DG Purchase, Lease, or PPA, or CS)?
- Check that the file you’re uploading ends in “.csv”?

#### *Correcting and re-uploading your template file*

- Delete (not clear or hide) any rows that gave you a “Form ID <Number>” success message?
- Use the error messages to help you find and make corrections to the right cells?



## Frequently Asked Questions

**Q: Once I download the CSV template from the Program portal, can I just use that template for all future projects?**

A: No. The Program Administrator will continue updating the CSV template on the portal. You should **always** download the most current version from the portal before you fill in any data on a CSV template. If you use an outdated template, you will receive an error message when you try to upload your forms.

**Q: How will I know that my DFs uploaded correctly? If there are errors, how will I know what needs to be corrected?**

A: After you upload your CSV and immediately after the portal is done processing your data, a pop-up will appear in your browser window. The pop-up will state the number of DFs that were created successfully, and the number of DFs that failed to create. Your browser will also automatically download a response file spreadsheet from the portal. The first column in the response file will list the errors that need to be corrected, along with the column number so you can find the error.

**Q: I entered data in a field on the CSV, but that data was not reflected on the generated DF. Why not?**

A: Several of the fields (questions) in the CSV are *conditional* on answering a previous field. That is, an answer to that question is only required, and the data is only reflected on the generated DF, if you provided a certain answer to a previous field.

**Example:**

1	<b>No</b>	117	118
2	<b>Type</b>	text	text (300)
3	<b>Required</b>	Yes	Only if 117 is "Yes"
4	<b>Validation</b>	Must be "Yes" or "No". If "Yes", answer No. 118.	Free text entry
5	RETURNED BY THE SYSTEM DISCLOSURE ID OR ERROR MESSAGE	Is insurance included for loss or damage to the project?	Provide details of insurance coverage, including limitations of coverage

In the DG Purchase template, column 118 is conditional on column 117 (required and used “[o]nly if 117 is ‘Yes’”). If you enter “No” to column 117 but then provide details of insurance coverage in column 118, the subsequently generated DF will not include the insurance details you entered in column 118 of the CSV, based on the “No” you entered in column 117. Note that you would not receive an error code when uploading the CSV to the portal because your answer to 117 (“No”) is an acceptable answer.

To prevent this from happening, please carefully review all fields in the CSV before uploading to the portal. Further, please review all fields in the generated DFs to ensure that you entered the data correctly, and that the DFs populated with the correct conditional fields for your projects.

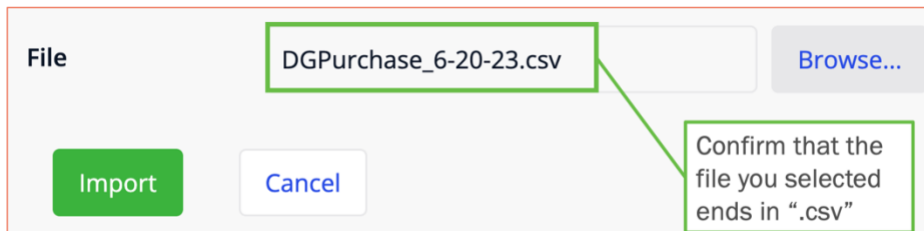
**Q: When I try to upload my CSV (which has 50 rows completed), I receive an error message stating that I have errors in some of the 50 rows I completed as well as over 150 additional rows (where I did not fill in any fields). Why is this happening? Will this prevent me from generating Disclosure Forms for the projects I included on the CSV?**

A: We are aware of this issue and will address it with future updates. For now, please disregard the error messages for the rows where you did not enter projects. If you received a success message for a row, that DF was successfully generated. Once you correct any errors in the rows where you did enter data, you will be able to re-upload the CSV template and generate the appropriate Disclosure Forms for those projects as well.

If you prefer, you can delete empty rows before you upload or re-upload the CSV template. See “Deleting empty rows (optional)” under [“Data Entry Tips.”](#)

**Q: When I try to upload the file to the portal, I receive an error message stating that the file cannot be uploaded, or “An error occurred, please contact your system administrator.” How can I upload the file into the portal?**

A: Make sure that the file you tried to upload is a .CSV file. After you browse and select your file, check to make sure that the file you selected ends in “.csv” or “.CSV.”



Note that the templates that you download from the portal to your computer are Excel (.XLSX) files. When you’re done filling out this Excel file template with your DF data, you need to [re-save the file in CSV format](#) before importing it to the portal.

**Q: Why are the templates provided in Excel format when the uploads need to be in CSV format?**

A: The Excel format allows the Program Administrator to set up dropdowns and provide guiding information in the templates (like cell shading and the “Instructions” sheet) that would not be possible in CSV format.

**Q: After my first upload, some rows uploaded successfully and some rows failed. When I edit my template file to fix the errors, what happens if I forget to delete the rows that uploaded successfully?**

A: The second upload should not create a second DF. That’s because the first and second uploads have the same “Project name”. Since the portal will only accept unique project names, the first upload will block the second.

**Q: What if the form uploaded successfully, but I realized the data is wrong?**

A: Since you can’t edit a completed form, you’ll need to upload a new form. You can edit that row in your template and upload it again. When you do this, you should get a **second** Form ID. Make sure that you give your customer the form that corresponds to this second (corrected) Form ID.

**Q: I uploaded a template and got a response file. Can I just use the response file for further corrections? (E.g., delete the successful rows from the response file, and then edit, save, and upload it back to the portal?)**

A: No. The portal expects the original template, so it skips the first 3 or 4 guidance rows. The response file doesn’t have any guidance rows, so if you try to upload the response file, the portal will miss your first 3 or 4 DF rows.

The safest course of action is to always return to and edit the official upload template.

**Q: I’m editing my template for a second upload. Can I just “hide” the rows that already created successfully?**

A: No. Hiding only works in Excel (.XLSX); it doesn’t work in CSV. When you export the template to CSV, the rows will appear right back. This means you’ll inadvertently upload them again. It’s better to delete those rows so you won’t be confused by the eventual errors (from attempting to upload duplicates).

## Additional Questions?

If you have any questions about disclosure forms (DFs), the DF bulk CSV upload function, the CSV upload templates, or this guide, please contact Program Administration Support:

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

877.783.1820

## Document History

Date	Version	Author(s)	Notes
5/30/23	1.0	Energy Solutions, Inc.	Created for June 1, 2023 Disclosure Form rollout.