

Contractor Portal Reference Guide

NY-Sun Contractor Portal

Welcome to the NYSERDA NY-Sun Contractor Portal Reference Guide. This document includes step-by-step instructions on how to login to and navigate through the Portal in the current Sandbox: UAT (test) environment. This environment will only exist temporarily until this new system is active.

1. Login to the portal using the username and password you were provided at nyserda-portal.force.com/login.



Username

Password

Log In

Remember me

[Forgot Your Password?](#)

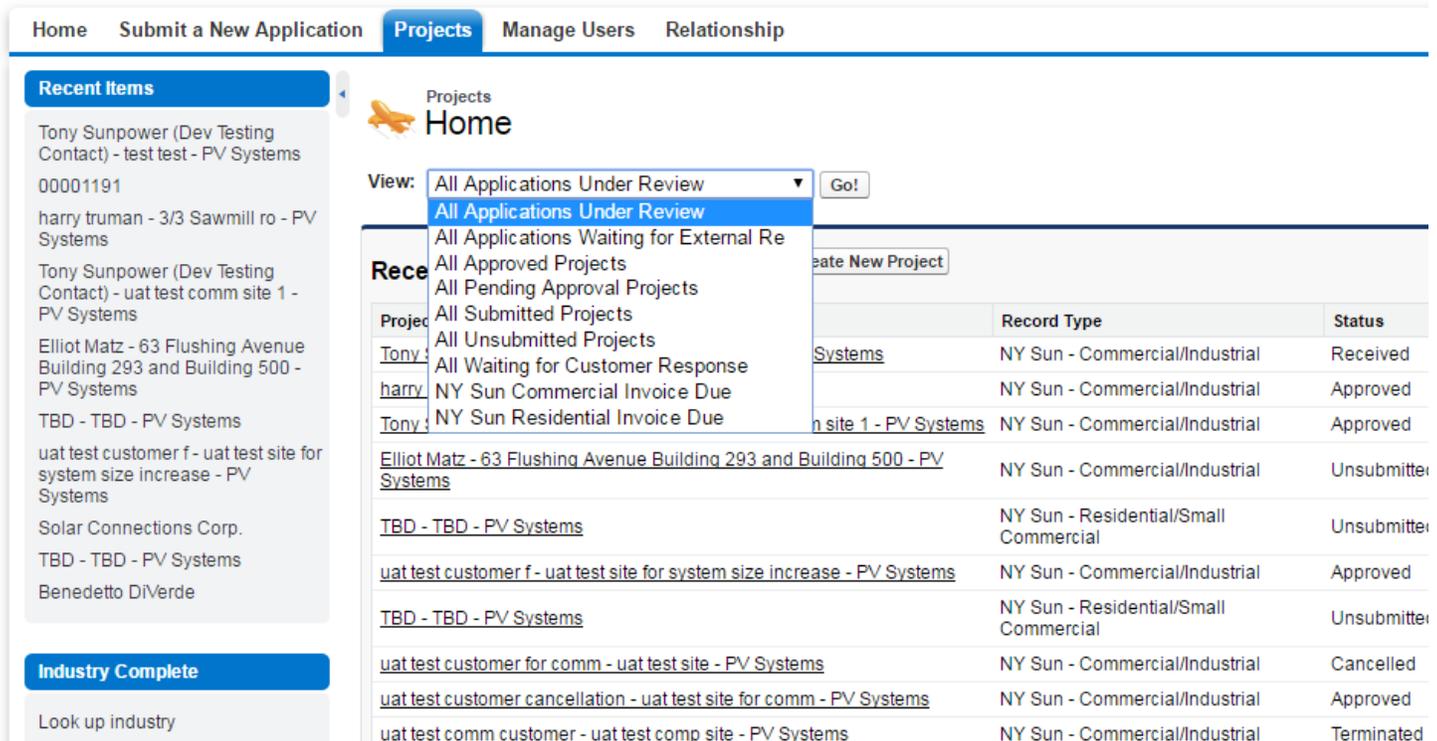
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2. Navigating to existing projects.
 - a. Click on the “Projects” Tab



- b. To look for an existing project, click the dropdown menu next to “View” to select the category you are looking for.





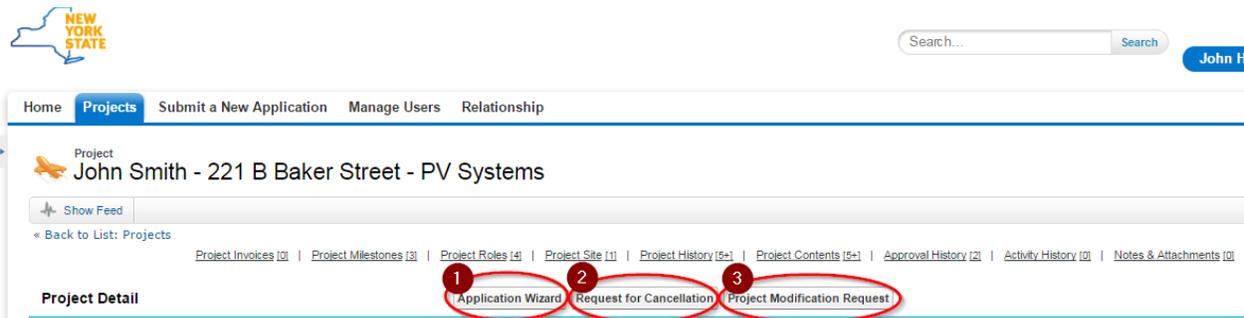
The screenshot shows the Contractor Portal interface with the 'Projects' tab selected. A dropdown menu is open next to the 'View:' label, listing various project categories. The 'Recent Items' sidebar is visible on the left, and a table of project records is shown on the right.

Project	Record Type	Status
Tony Sunpower (Dev Testing Contact) - test test - PV Systems	NY Sun - Commercial/Industrial	Received
harry truman - 3/3 Sawmill ro - PV Systems	NY Sun - Commercial/Industrial	Approved
Tony Sunpower (Dev Testing Contact) - uat test comm site 1 - PV Systems	NY Sun - Commercial/Industrial	Approved
Elliot Matz - 63 Flushing Avenue Building 293 and Building 500 - PV Systems	NY Sun - Commercial/Industrial	Unsubmitted
TBD - TBD - PV Systems	NY Sun - Residential/Small Commercial	Unsubmitted
uat test customer f - uat test site for system size increase - PV Systems	NY Sun - Commercial/Industrial	Approved
TBD - TBD - PV Systems	NY Sun - Residential/Small Commercial	Unsubmitted
uat test customer for comm - uat test site - PV Systems	NY Sun - Commercial/Industrial	Cancelled
uat test customer cancellation - uat test site for comm - PV Systems	NY Sun - Commercial/Industrial	Approved
uat test comm customer - uat test comp site - PV Systems	NY Sun - Commercial/Industrial	Terminated

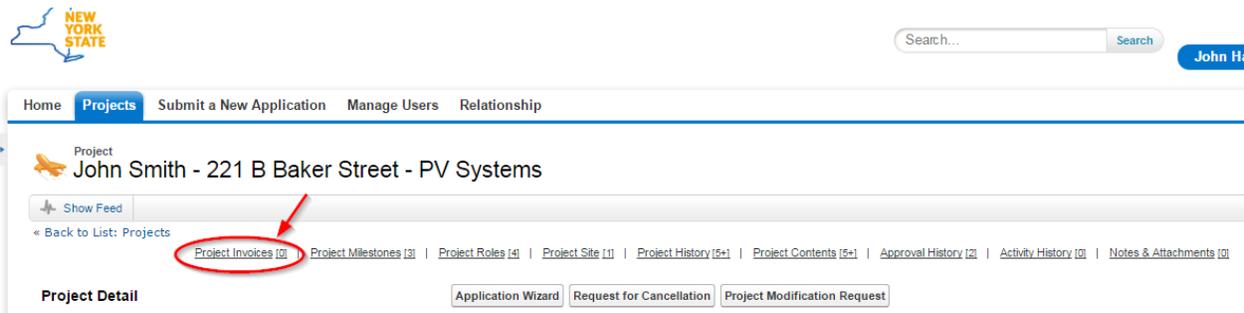
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- c. To review existing project information, click on a project.
 1. To return to the initial application page click the “Application Wizard” button.
 2. To cancel the project, click on the “Request for Cancellation” button.
 3. To request a change, click on the “Project Modification Request” button.



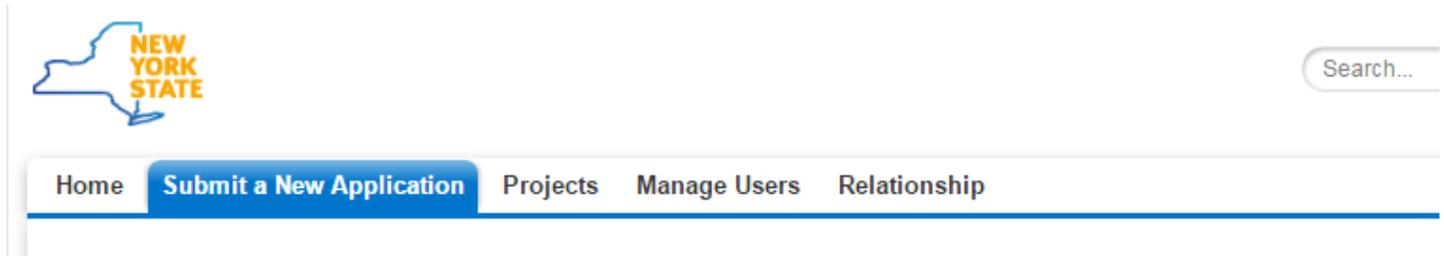
- d. To create and send an invoice, click on or scroll down to the “Project Invoices” related list, then click on “New Project Invoice”.



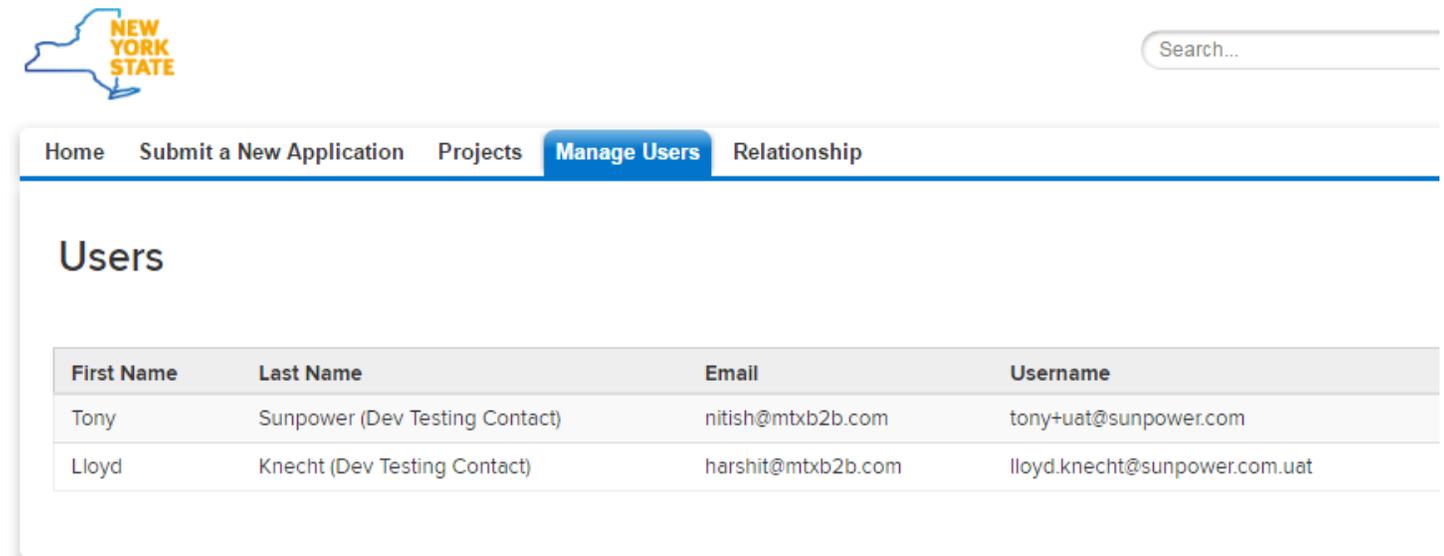
3. To start a new application, click on the “Submit a New Application” tab.

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4. Each member of your organization is required to have a unique username and password. To manage Portal users within your organization, click on the “Manage Users” tab.
 - a. To add a user, click on the “Add a New User” button.
 - b. That user will receive an email to create a password and access the portal.



5. To manage your Contractor/ Builder relationships, click on the “Relationship” tab.
 - a. Click on the dropdown menu under “Filter By Status” to choose.
 - b. Click on the “Add a Request” button to request another relationship.
 - c. For a more comprehensive walk-through, please refer to the “NY-Sun Contractor-Builder Relationship Reference Guide”.

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Sandbox: UAT

Search... Search

Tony Sunpower (D... ▾)

Home Submit a New Application Projects Manage Users **Relationship**

Filter By Status

+ ADD REQUEST

Approved ▾

Company Name	Relationship Status	Relationship Approved Date	Actions
SunPower(DevTest)	Approved	July 21, 2016	ViewDocument Cancel
Harvest Power(DevTest)	Approved	July 31, 2016	Cancel