NY-Sun Contractor/Builder Relationships

Welcome to the NYSERDA NY-Sun Contractor/Builder Relationship Reference Guide. This document includes step-by-step instructions on how to establish and manage your Contractor/Builder relationships. Please refer to the NY-Sun Program Manuals for Contractor and Builder roles and responsibilities.

1. Login to the portal using the username and password you were provided at nyserda-portal.force.com/login.
1. Click on the “Relationship” tab.

2. Click on the dropdown menu to select the relationship status you want to view.
3. From the “Pending My Approval” relationship status, you will see any requests that have been sent to you to approve.
   a. To approve, simply click on SignDocument, which will bring you to Docusign to complete your e-signature.
   b. You may also click Reject if you do not wish to establish the requested relationship.

4. To establish a new relationship click on “Add a Request”.
   a. Begin typing and select the company name you are requesting to establish a relationship with. If the company you are looking for does not appear, they are not currently an approved Contractor or Builder.
b. Click “Continue and Sign Document” which will bring you to Docusign to complete your e-signature.
c. After signing, the document will be sent to the company you are requesting a relationship with for them to sign.

5. You can also view the requests you have sent from the “Pending My Approval” relationship status.