

Contractor/Builder Relationship Reference Guide

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 nyserderda-portal.force.com/login.



Username

Password

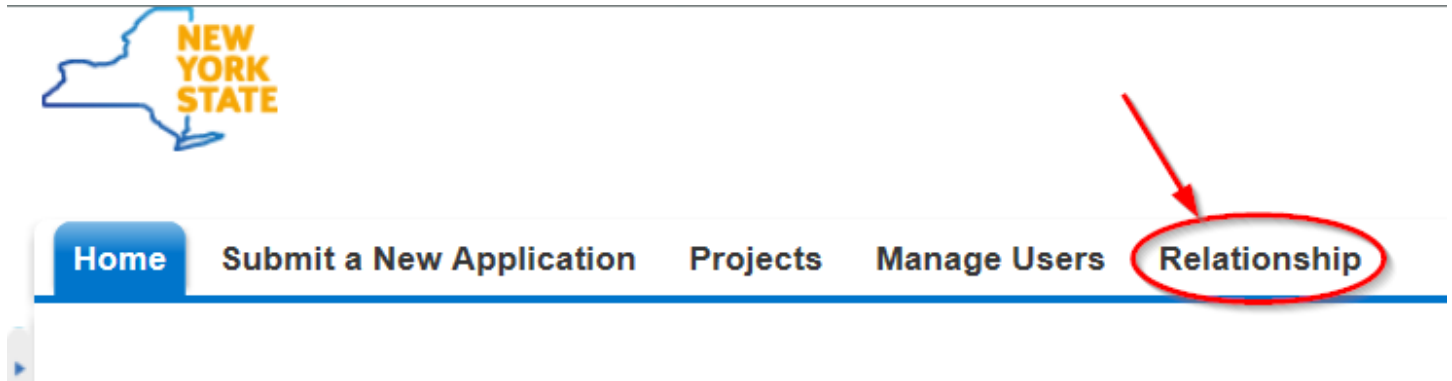
[Log In](#)

Remember me

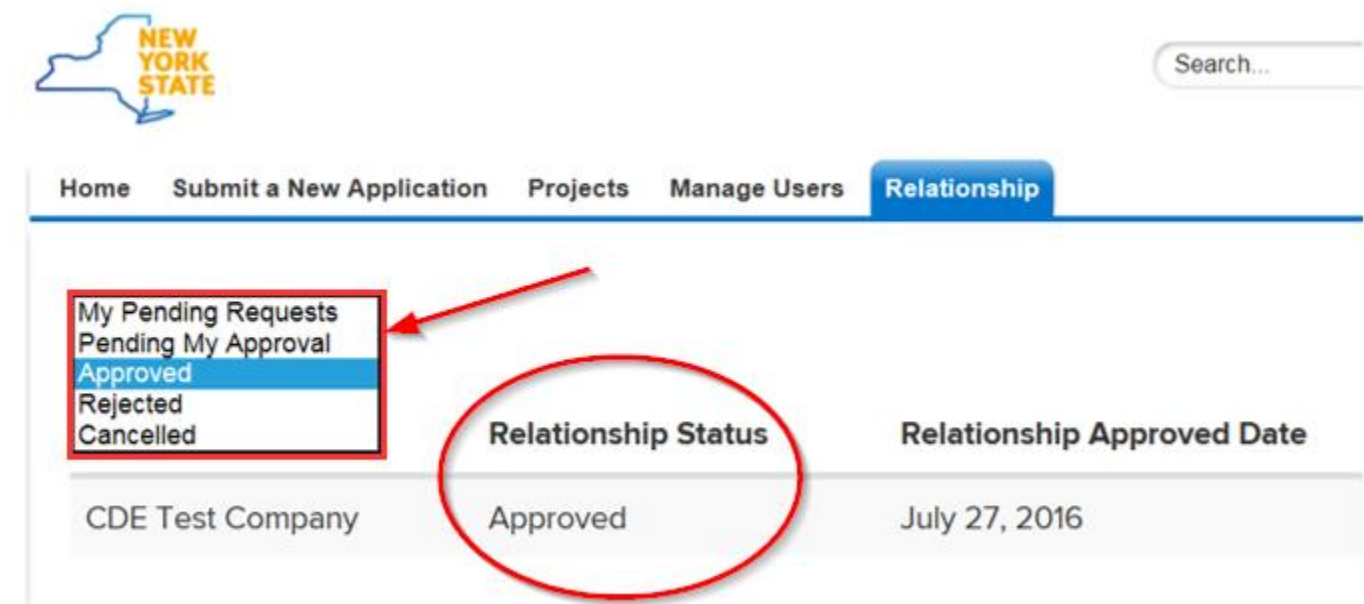
[Forgot Your Password?](#)

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1. Click on the "Relationship" tab.



2. Click on the dropdown menu to select the relationship status you want to view.



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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.

Filter By Status + ADD REQUEST

Pending My Approval ▾

Company Name	Relationship Status	Relationship Requested Date	Actions
Best Home Solar	Pending Approval	July 27, 2016	SignDocument Reject

4. To establish a new relationship click on “Add a Request”.

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

Filter By Status + ADD REQUEST

Approved ▾

Company Name	Relationship Status	Relationship Approved Date	Actions
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- 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.

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REQUEST FOR RELATIONSHIP ×

Company Name	<input type="text" value="solar"/>
Notes	<ul style="list-style-type: none">Solar Liberal - MLBBorrego Solar Systems 123 TestQuicheSolar 2SuNation Solar SystemsSuNation Solar Systems64 Solar LLCActive Solar Development, LLC

- b. Click “Continue and Sign Document” which will bring you to DocuSign to complete your e-signature.

REQUEST FOR RELATIONSHIP ×

Company Name	<input type="text" value="Solar Co."/>
Notes	<input type="text"/>

CONTINUE AND SIGN DOCUMENT

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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.

Filter By Status

[+ ADD REQUEST](#)

My Pending Requests ▼

Company Name	Relationship Status	Relationship Requested Date	Actions
A-Best Energy Power	Pending Approval	August 10, 2016	