

## Introduction

This page reviews how external contractors can add equipment to their project.

## Instructions

1

Log into the Salesforce Portal and access the **Projects** Tab.

The screenshot shows the Salesforce Portal interface for the 'Clean Energy Standard' project. The 'Projects' tab is selected, displaying a list of four test projects. The table columns include Action, RFP #, Project Name, Technology Type, NEIS Contract ID, Project Status, Record Type, Parent Company Name, and Contract/Year Summary. The first project, 'Test Project 1', is highlighted with a green box around its name.

Action	RFP #	Project Name	Technology Type	NEIS Contract ID	Project Status	Record Type	Parent Company Name	Contract/Year Summary
<a href="#">Edit</a>	ORECRFP18-1	Test Project 1	Offshore Wind	0000000000000000000000001455...	Under Development			<a href="#">Contract/Year Summary</a>
<a href="#">Edit</a>	ORECRFP18-1	Test Project 2	Offshore Wind	0000000000000000000000001456...	Under Development			<a href="#">Contract/Year Summary</a>
<a href="#">Edit</a>	ORECRFP20-1	Test Project 3	Offshore Wind	0000000000000000000000001772...	Under Development			<a href="#">Contract/Year Summary</a>
<a href="#">Edit</a>	ORECRFP20-1	Test Project 4	Offshore Wind	0000000000000000000000001772...	Under Development			<a href="#">Contract/Year Summary</a>

2

Access the Project Record in Salesforce by clicking the link in the **Project Name** column.

This screenshot is identical to the previous one, but with a green box highlighting the 'Test Project 1' link in the 'Project Name' column of the first row.

3

In the Project Records page, click the **Project Equipment** tab.

The screenshot shows the 'Project Record' page for 'Test Project 1'. The 'Project Equipment' tab is highlighted in green. The page includes a 'Recent Items' section, a 'Portal Knowledge Base' section, and a 'Need Help?' section. The 'Project Detail' section is visible at the bottom, showing 'Project Information' and 'Manage Milestones' buttons.

4

Then, click the **New Project Equipment** button to add new Project Equipment details.

Home Projects Manage Users Project Payment Summary

Recent Items

Portal Knowledge Base

Need Help?

Project  
Test Project 1

Hide Feed

Show All Updates

Follow

Followers

No followers.

Project Progress Reports (54) | Project Equipment (0)

Project Equipment

New Project Equipment

No records to display

5

On the next page, use the drop-down menu to select whether it is a **Wind Project** Equipment or **Solar Project** Equipment record. Then, click the **Continue** button.

Home Projects Manage Users Project Payments Payments Reference Project Payment Summary

Recent Items

Portal Knowledge Base

Need Help?

New Project Equipment  
Select Project Equipment Record Type

Select a record type for the new project equipment.

Select Project Equipment Record Type

Record Type of new record

Wind

Solar

Wind

Continue Cancel

Available Project Equipment Record Types

Record Type Name	Description
Solar	
Wind	

6

The page will redirect to the New Project Equipment page, use the Equipment Type drop-down menu to select the **Equipment Type**.

Home Projects Manage Users Project Payment Summary

Recent Items

Portal Knowledge Base

Need Help?

Project Equipment Edit  
New Project Equipment

Project Equipment Edit

Save Save & New Cancel

Information

Equipment Type

None

Manufacturer

None

Other Manufacturer

None

Model #

None

Project Name

Quantity

Nameplate Rating (kW)

Save Save & New Cancel

7

The **Manufacturer** field will become available after you select the Equipment Type. Use the drop-down menu to select the Manufacturer.

If you select **Other** as an option under the Manufacturer field, then the **Other Manufacturer Text Field** should be filled.

Home Projects Manage Users Project Payment Summary

Recent Items

Portal Knowledge Base

Need Help?

Project Equipment Edit  
New Project Equipment

Project Equipment Edit Save Save & New Cancel

Information

Equipment Type Panel Type 'A'

Project Name

Quantity

Nameplate Rating (kW)

If there's only one racking manufacturer used for the project, enter a quantity of 1 and the total projects kWdc rating in the Nameplate Rating.

--None--  
Adani/Mundra  
AE Solar  
Astronergy  
AU Optonics  
Beyond Sun  
Boviet  
BYD

Save Save & New Cancel

8

Once you have entered all of the data, click on the **Save** to save the record.

Click on **Save & New** button to save a record and create a new record immediately.

Click on **Cancel** button to exit out of the page without saving any information.

Home Projects Manage Users Project Payment Summary

Recent Items

Portal Knowledge Base

Need Help?

Project Equipment Edit  
New Project Equipment

Project Equipment Edit Save Save & New Cancel

Information

Equipment Type Panel Type 'A'

Project Name

Quantity

Nameplate Rating (kW)

Manufacturer

Other Manufacturer

Model #

Save Save & New Cancel

9

Once the new Project Equipment is created successfully, a message confirming **Project Equipment has been saved** will pop up.

Home Projects Manage Users Project Payment Summary

Recent Items

Portal Knowledge Base

Need Help?

Project Equipment  
E-0014

Printable View

Project Equipment has been saved.

Notes & Attachments (0) | Open Activities (0) | Activity History (0) | Project Equipment History (1)

Project Equipment Detail Edit Clone

Equipment Type Panel Type 'A'

Project Name

Quantity

Nameplate Rating (kW)

Nameplate Capacity for Bid Facility (MW) 0.000

Created By

Last Modified By

Project Equipment Name E-0014

Edit Clone

10

Once the new Project Equipment is created, go back to the Project Records page and click on the **Project Equipment** tab to check /edit the new Project Equipment.

HomeProjectsManage UsersProject Payment Summary

Recent Items

Portal Knowledge Base

Need Help?

Project

Test Project 1

Printable View

Hide Feed

Search

Show All Updates

Follow

Followers

No followers.

Project Progress Reports (5+)

Project Equipment (1)

Project Equipment

New Project Equipment

Action	Project Equipment Name	Equipment Type	Manufacturer	Model #	Nameplate Rating (kW)	Quantity
<a href="#">Edit</a>	E-0014	Panel Type 'A'	Other			