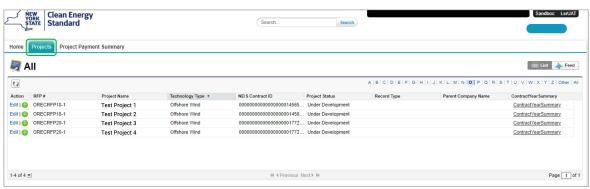## Introduction

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

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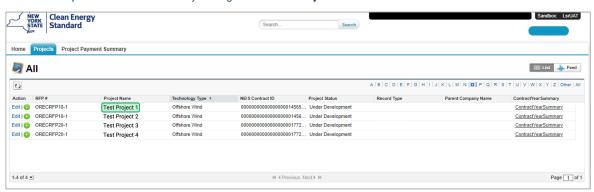
1 Log into the Salesforce Portal and access the **Projects** Tab.
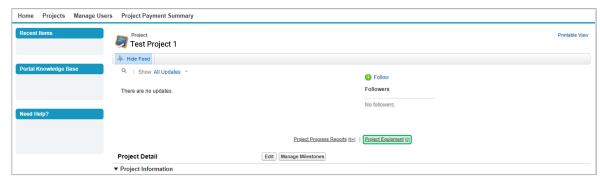

2 Access the Project Record in Salesforce by clicking the link in the **Project Name** column.
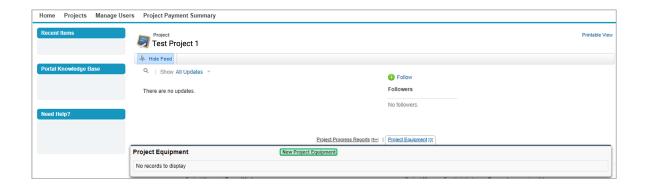

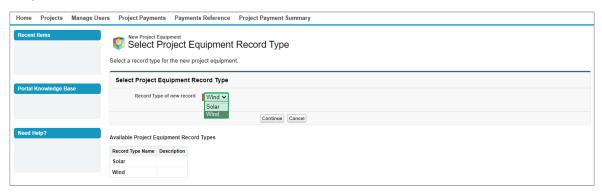**3** In the Project Records page, click the **Project Equipment** tab.

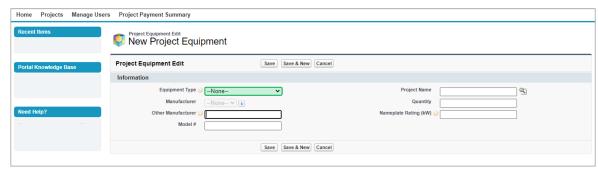**4** Then, click the **New Project Equipment** button to add new Project Equipment details.

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.

6

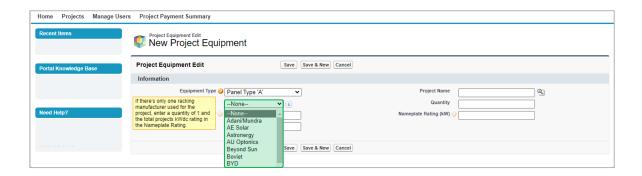The page will redirect to the New Project Equipment page, use the Equipment Type drop-down menu to select the **Equipment Type**.

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.
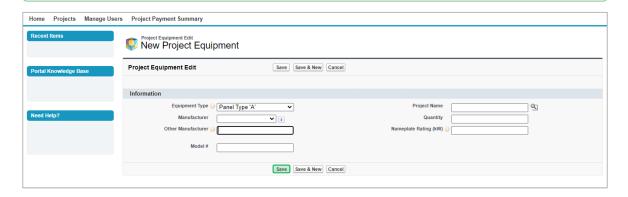
8

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.

9

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

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 Equiment.

Home   Projects   Manage Users   Project Payment Summary

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Project
Test Project 1

Printable View

Hide Feed

Show All Updates ▾

There are no 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
Edit	E-0014	Panel Type 'A'	Other			