

Salesforce Application Portal

Applicants are required to create a Salesforce Application Portal account to use the Online Application. A Salesforce Application Portal account provides multiple methods of communication through the use of Notes and Attachments that allows Applicants to:

- Communicate with the NYSEDA program (even after application submission).
- Update information or documents in their application.

i The instructional materials below are intended to provide guidance for:

- Applicants when creating a Salesforce Application Portal, or
- CLEAResult Shared Services, Community Organizations, NYSEDA Energy Advisors, Participating Contractors, and Participating Utilities when assisting Applicants through the online application process.

1

Access the Portal Registration website for the Energy Affordability & Equity Residential program.

Salesforce Customer Registration

2

On the Portal Registration page, review the introductory text to familiarize yourself with the registration requirements.

Let's get started with creating your account:

First, please enter your first and last name and provide a valid email address

Once you click submit, an email will be sent to the address provided.

Second, follow the instructions in the email to create a password and take the next steps to complete the application.

Need help? - call 877-697-6278, email us at: info.residential@nyserda.ny.gov

Why do I need to create an account?

Clicking "apply now" allows you to set up an account. Setting up an account is the quickest way to apply for services. Once your account is set up, you can save your in-progress application, submit your application and supporting documents for review, and check on your application status. If you would rather print and mail in a paper application, you may print one here: [link](#)

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On the same page, complete all three fields in the **Contact Information** section. This includes **First Name**, **Last Name**, and **Email Address**. All fields are required.

Contact Information

First Name *

Last Name *

Email *

4

Click **Create**.

CREATE

5

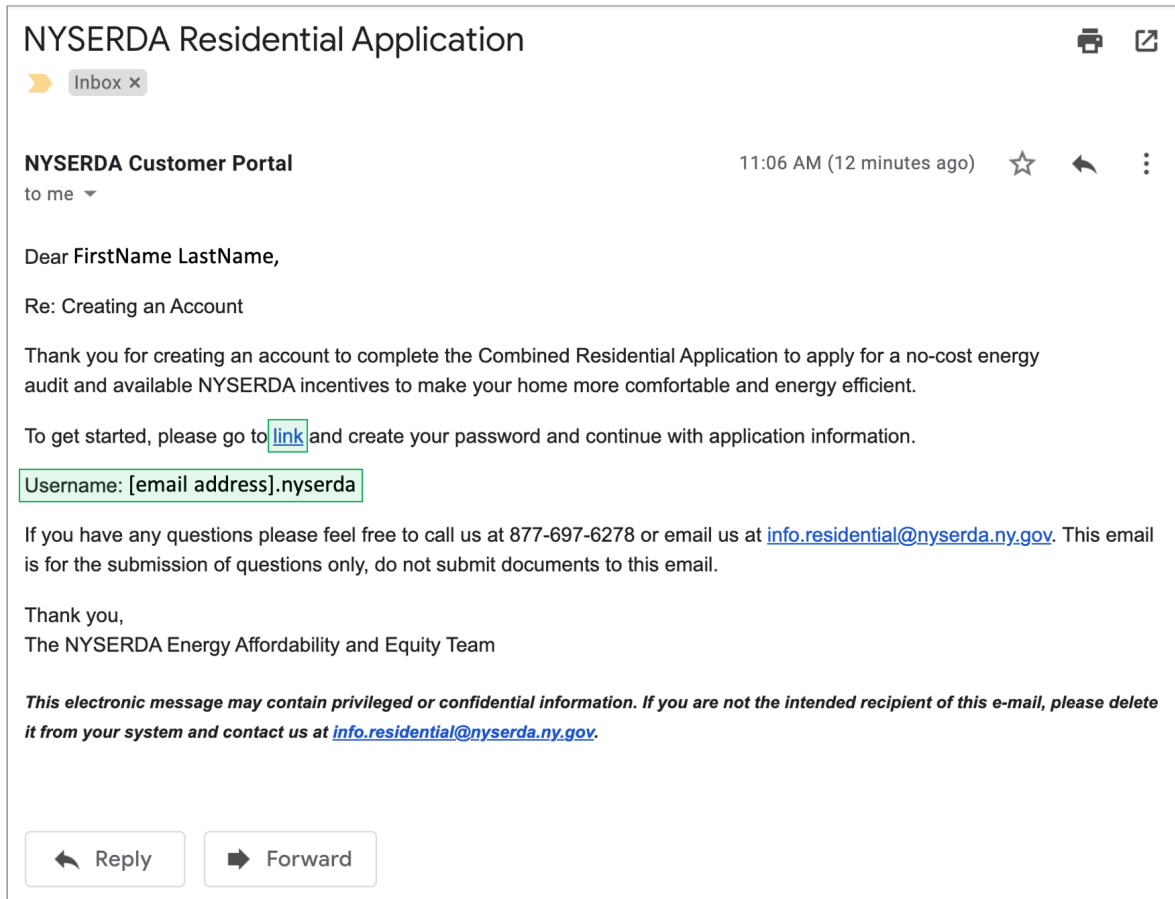
The page will reload with instructions that outline next steps. Salesforce generates an email to the email address provided in Step 3 above to continue the Salesforce Portal account creation process.

Thank you for creating an account to complete your application. An email has been sent to the email address provided. To continue the application process, please follow the directions in the email.

If an email is not received, check your spam folder to make sure the message was not flagged by your email provider. If you still can't find the email, please reach out to us by calling 877-697-6278 or emailing info.residential@nyserda.ny.gov

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Access the email account entered into Step 3 above and locate the email sent by Salesforce. This email contains a link to continue with your Salesforce Portal account creation as well as your **Username** (the email address entered in Step 3 above with **.nyserda** appended to the end).





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Click the link within the email.

8

On the page you are directed to, create, and confirm, a password for your Salesforce Portal account, being sure to consider the password rules listed on the page. Then, click **Change Password**.

Change Your Password

Enter a new password for
andy randers en@gmail.com.nyserda. Make sure to
include at least:

- ☐ 15 characters
- ☐ 1 uppercase letter
- ☐ 1 lowercase letter
- ☐ 1 number
- ☐ 1 special character ⓘ

* New Password



* Confirm New Password

Change Password

Password was last changed on 6/16/2021 11:06 AM.

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Once you click **Change Password**, you will be directed to your new Salesforce Portal account.

Choose a program

Combined Residential Application

Please complete the following application to see if you qualify for a no-cost energy audit and incentives towards making your home more comfortable and energy efficient.

We will ask questions about the number of people living in your home and income sources, your electric and heating fuel providers, and the county where you live to help determine your incentive eligibility.

If you are an electric customer of PSEGLI, and have not received a referral letter from NYSERDA, please reach out to your utility for current offers.
