Managing Accounts and Program Partnerships in Salesforce

System Instructions

Introduction

The following sections will help you understand the process for **Creating** and **Managing Program Partnerships** in **Salesforce**.

Before creating a **New Account**, search in **Salesforce** for an **Existing Account** to prevent duplicate accounts. Maintaining clean, accurate data is one of the most critical things you can do to get the most out of **Salesforce.**

Search for an Existing Account

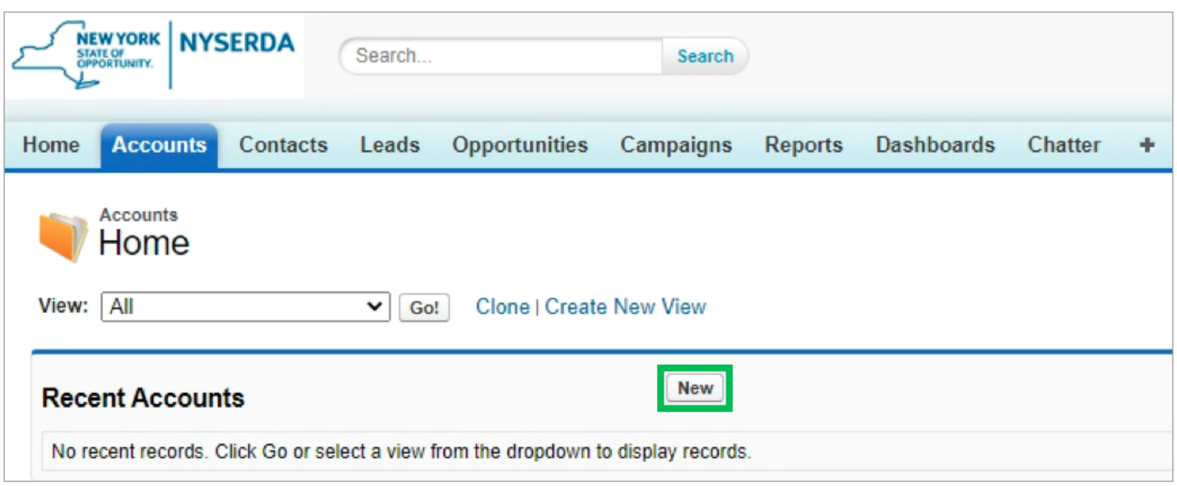
1. Navigate to the **NYSERDA launch page** and click the **Salesforce** tile**.**

2. Enter the **Company Name** in the **Search** field at the top of **Salesforce** to check for any existing accounts. Always select and edit an existing account if you find a match.

3. If the search results in zero matches, create a **New Account**.

Create a New Account

1. If there are no existing accounts, click on the **Accounts** tab and then click **New**.

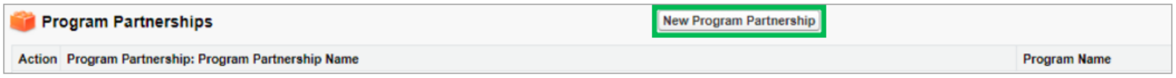


2. Fill in all available information into the corresponding fields and **Save** the entry.

Establish a Program Partnership

1

On the **Account** tab, scroll to the **Program Partnerships** section and click **New Program Partnership.**



2

Search for the program name in the **Program field**; select the appropriate program and click **Save**. If the program name is not available, submit a **Salesforce Jira Software Issue** to request adding the program to the list.

3

Save the record.

Updating Program Partnership Records

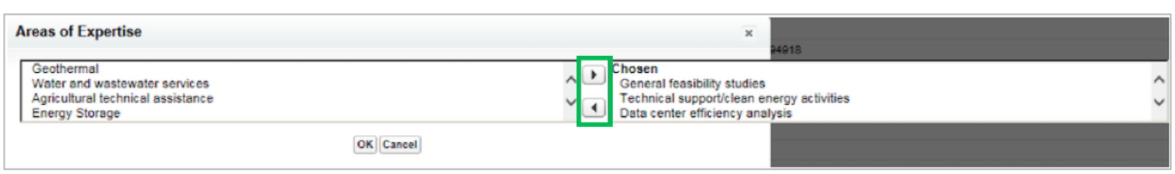
1

If a website is not already established to display your **Program Partnership** data, a **Salesforce Jira Software Issue** must be **Submitted** to initiate the process. The **Program Partnership** record fields impact what is displayed on **NYSERDA's Website**. Reference the record fields in the information table below:

Status	Indicates the status of the Account in relationship to the Program. Program Partnerships with a "Full", "Provisional", or "Probation" status can be displayed on the website.
Website	The URL of the Account's website. This can be displayed on the website.
Areas of Expertise	Skillsets and technologies in which an Account specializes. Multiple Areas of Expertise may be selected and displayed on the website.
Counties Served	The New York State Counties where the Account performs their business activities. Multiple Counties Served may be selected and displayed on the website.
Do Not Display on Website	A checkbox which when selected, removes an Account from the website listing for only the applicable Program Partnership.

2

Select desired **Area of Expertise** from left-hand section and click the right arrow to add to the **chosen** field; to remove an **Area of Expertise** from the **chosen** field, select from the right-hand section and click left arrow. When done click **OK**.

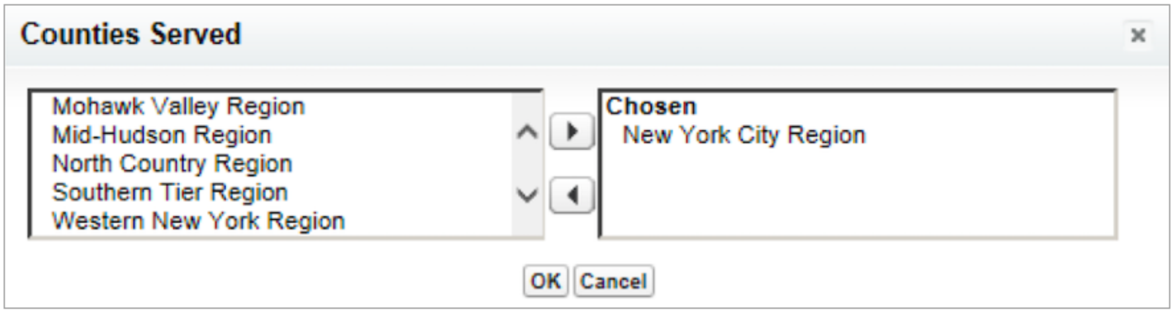


3

To edit **Counties Served**, hover over the field and **Double Click**.

4

Scroll down past the counties until you reach the regions at the bottom of the list on the left and select **desired region(s)**. Click **OK**.


Counties Served
Mohawk Valley Region
Mid-Hudson Region
North Country Region
Southern Tier Region
Western New York Region
Chosen
New York City Region
OK
Cancel