

Introduction

This page reviews how contractors add new users to the Large Scale Renewable (LSR) Salesforce Portal.

Instructions

 The instructions on this page can only be completed by existing contractors who have been assigned the **Manage Users Tab** permission. This permission set must be set either by a NYSERDA employee or an existing contractor in your organization that has previously been granted this access. If you have access to this permission set you will have access to the **Manage Users** tab after logging into the Large Scale Renewables Salesforce Portal.

1

Log into the Large Scale Renewables [Salesforce Portal](#).

2

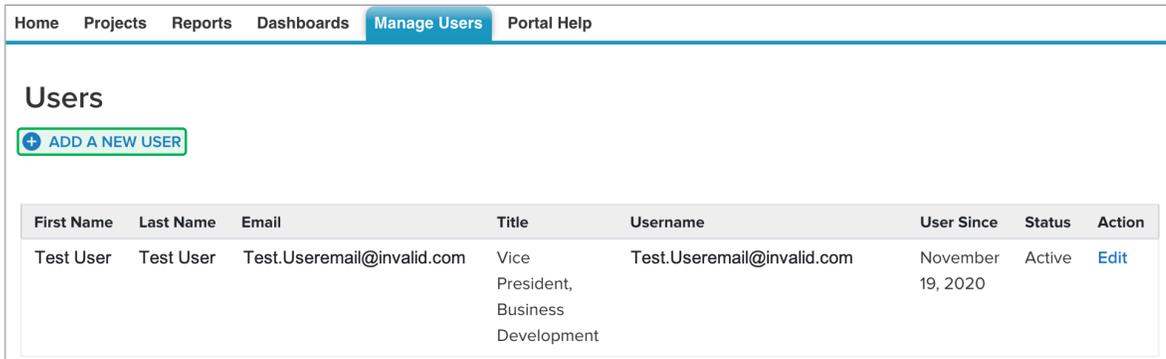
Click on the **Manage Users** tab.

 This tab will only appear for Portal users who have previously been granted Admin access.



3

Click the **Add A New User** option. A modal window will open.



4

Enter the new users **First Name**, **Last Name** and **Email Address**. If this new user should also have access to the Salesforce Portal as an Admin user, check the **Admin** box.

Add a new User ×

Please select an existing contact to create new user

Info: There are no existing contacts available to enable as a user.

OR

Please enter new user information:

First Name

Last Name

Email

Admin

✔ If your organization currently has other members listed as Contacts in the Large Scale Renewable Salesforce Portal that are not set up as Portal users, the **Please select an existing contact to create new user** section of the modal window will contain a drop-down with a list of all Portal contacts. If the user you want to add appears on this drop-down list, you can select their name. This will auto-populate all fields on the modal window except the **Admin** box.

5

When you have completed the form, click Save Changes to add the new user for Portal access.