

Campaign Codes

With the EmPower+ Application, CLEAResult Shared Services, Contractors, Participating Utilities, and Community Organizers can create Campaign Codes from their Salesforce Application Portal. Once a campaign code is created, a web link will be generated that can be posted to a website or shared with an applicant through email.

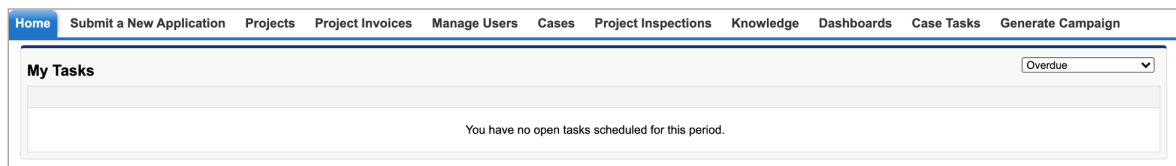
- Campaign codes generated by Contractors or Community Organizers will prepopulate the associated fields on the Partner Information page of the online EmPower+ Application when the customer initiates an application through the associated web link.
- All applications initiated by the customer through a campaign code generated web link, will be associated with that campaign code and trackable via a linked report.
- All entities with access to generate a campaign code can set up multiple campaign codes to track different marketing outreach efforts through Salesforce.

1

To create a **Campaign Code**, log into Salesforce.

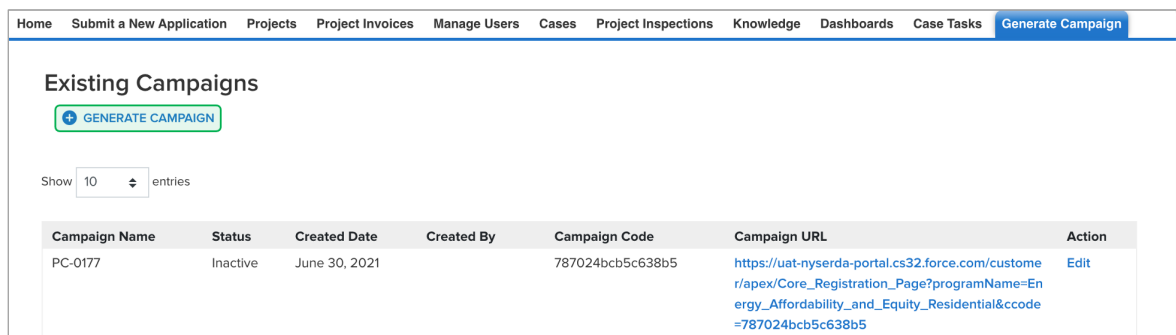
2

Access the **Generate Campaign** tab.



3

On the **Generate Campaign** tab, a list of all campaigns created by the logged in user are displayed. To create a new **Campaign**, click **Generate Campaign**.



4

A modal window will open. Click **OK** to confirm the request to generate a new Campaign Code (and URL).

CONFIRM ×

Are you sure you want to generate a new Campaign URL for the Combined Residential Application?

OK

CANCEL

5

Back on the **Generate Campaign** tab, the newly generated **Campaign Code** will appear on the top of the list. Be sure to check that the **Campaign Code** status is set to **Active**. The Campaign URL can be copied and pasted for use in websites or shared through email.

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GENERATE CAMPAIGN

Show

10

entries

| Campaign Name | Status | Created Date | Created By | Campaign Code | Campaign URL | Action |
|---------------|----------|---------------|------------|------------------|--|--------|
| PC-0180 | Active | July 1, 2021 | | 99aac4ac44e36aee | https://uat-nyserda-portal.cs32.force.com/customerr/apex/Core_Registration_Page?programName=Energy_Affordability_and_Equity_Residential&ccode=99aac4ac44e36aee | Edit |
| PC-0177 | Inactive | June 30, 2021 | | 787024bcb5c638b5 | https://uat-nyserda-portal.cs32.force.com/customerr/apex/Core_Registration_Page?programName=Energy_Affordability_and_Equity_Residential&ccode=787024bcb5c638b5 | Edit |

6

Campaign Codes that will no longer be utilized should be switch to **Inactive** status.

7

Click the **Edit** link to the far right of the **Campaign Code**.

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| Campaign Name | Status | Created Date | Created By | Campaign Code | Campaign URL | Action |
|---------------|--------|--------------|------------|------------------|---|-----------------|
| PC-0180 | Active | July 1, 2021 | | 99aac4ac44e36aee | https://uat-nyserda-portal.cs32.force.com/customerr/apex/Core_Registration_Page?programName=Energy_Affordability_and_Equity_Residential&ccode=99aac4ac44e36aee | <div>Edit</div> |

8

On the modal window that opens, click the **Status** drop-down and change the selection from **Active** to **Inactive**. Then click **Save Changes**.

×

Edit Campaign

Campaign Name *

PC-0180

Campaign Code *

99aac4ac44e36aee

Status *

Active

--None--

✓ Active

Inactive

CLOSE

SAVE CHANGES

9

The number of applications that have been received for each campaign code can be viewed on the **Generate Campaign Code** tab.

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GENERATE CAMPAIGN

Show

10

entries

| Campaign Name | Status | Created Date | Created By | Campaign Code | Campaign URL | Action | #Apps |
|---------------|--------|----------------|------------------------|------------------|--|-------------|-------|
| PC-0103 | Active | August 5, 2022 | Señor Residential Test | 297935e994ecb0e7 | https://uat-nyserda-portal.cs234.force.com/custom/apex/Core_Registration_Page?programName=Energery_Affordability_and_Equity_Residential&ccode=297935e994ecb0e7 | Edit View | 0 |
| PC-0088 | Active | March 30, 2022 | Señor Residential Test | 3a6b09ee453c4b51 | https://uat-nyserda-portal.cs234.force.com/custom/apex/Core_Registration_Page?programName=Energery_Affordability_and_Equity_Residential&ccode=3a6b09ee453c4b51 | Edit View | 2 |
| PC-0087 | Active | March 30, 2022 | Señor Residential Test | 37a49d2c33bd7d8e | https://uat-nyserda-portal.cs234.force.com/custom/apex/Core_Registration_Page?programName=Energery_Affordability_and_Equity_Residential&ccode=37a49d2c33bd7d8e | Edit View | 1 |

10

To view the applications associated with the campaign code, click on the **View** hyperlink in the **Action** column.

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| Campaign Name | Status | Created Date | Created By | Campaign Code | Campaign URL | Action | #Apps |
|---------------|--------|----------------|------------------------|------------------|--|---------------------------------|-------|
| PC-0103 | Active | August 5, 2022 | Señor Residential Test | 297935e994ecb0e7 | https://uat-nyserda-portal.cs234.force.com/custom/apex/Core_Registration_Page?programName=Energy_Affordability_and_Equity_Residential&ccode=297935e994ecb0e7 | <div>Edit</div> <div>View</div> | 0 |
| PC-0088 | Active | March 30, 2022 | Señor Residential Test | 3a6b09ee453c4b51 | https://uat-nyserda-portal.cs234.force.com/custom/apex/Core_Registration_Page?programName=Energy_Affordability_and_Equity_Residential&ccode=3a6b09ee453c4b51 | <div>Edit</div> <div>View</div> | 2 |
| PC-0087 | Active | March 30, 2022 | Señor Residential Test | 37a49d2c33bd7d8e | https://uat-nyserda-portal.cs234.force.com/custom/apex/Core_Registration_Page?programName=Energy_Affordability_and_Equity_Residential&ccode=37a49d2c33bd7d8e | <div>Edit</div> <div>View</div> | 1 |

The page will then redirect to the campaign code **Record**.

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 **EAE Projects By Campaign Code**

Report Generation Status: Complete

Report Options:

Summarize information by:
Status

Show
All projects

Time Frame
Date Field
75% Interconnection Payment Due Date
Range
Custom
From
To

[Run Report](#) [Hide Details](#) [Printable View](#) [Export Details](#)

Filtered By:
Project Record Type equals Energy Affordability and Equity Residential
AND Contractor Supplier ID (Project) equals 3a6b09ee453c4b51

Grouped By: Status
Sorted By: Status

| Project | Project Name | Application Number | Customer Name | Primary Contractor Account | Status Reason | Waiting for External Response | Submitted Date | Uplight Project Stage | Migration ID |
|------------------------------|--------------|--------------------|---------------------------|----------------------------|---------------|-------------------------------|-------------------|-----------------------|--------------|
| Status: Approved (2 records) | | | | | | | | | |
| 0000445800 | | 0000445800 | Mageeth Test | Residential Test Account | - | <input type="checkbox"/> | 9/19/2022 2:08 PM | - | 3761 |
| 0000441800 | | 0000441800 | This is a Test Test I say | Residential Test Account | - | <input type="checkbox"/> | 7/13/2022 4:01 PM | - | 3698 |
| Grand Totals (2 records) | | | | | | | | | |

Confidential Information - Do Not Distribute