

NYSERDA NY-Sun Initiative Project Invoice Reference Guide

Project Invoice Reference Guide

Welcome to the NYSERDA NY-Sun Project Invoice Reference Guide. This document includes step-by-step instructions on how to complete and submit a project invoice to the Residential & Nonresidential or Commercial & Industrial Programs.

1. Login to your portal at nyserda-portal.force.com/login.



Username

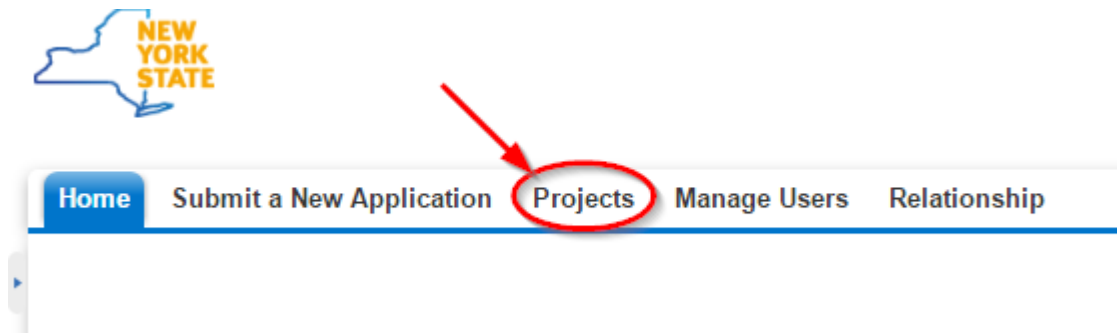
Password

Log In

Remember me

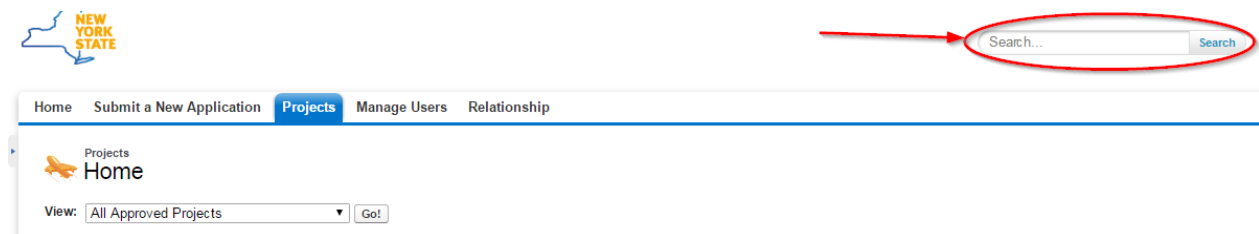
[Forgot Your Password?](#)

2. Click on the 'Projects' tab.

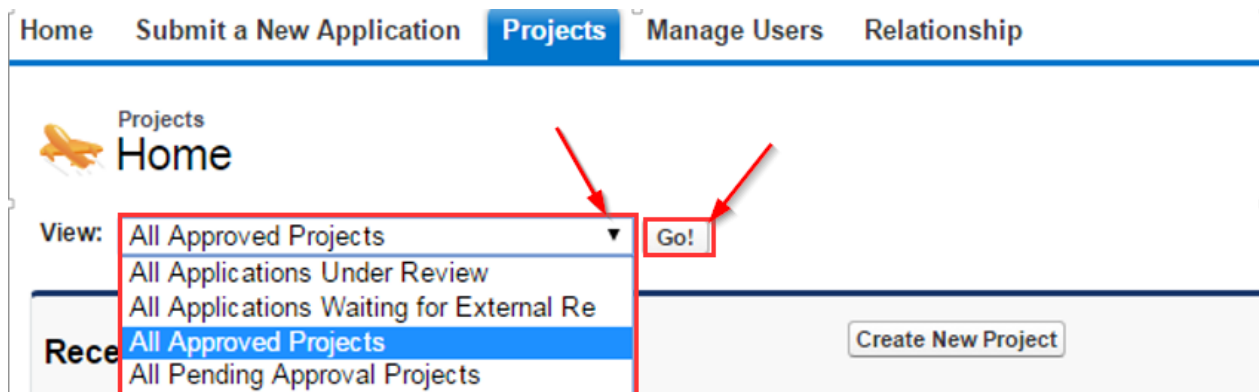


3. Search for the project you wish to submit a project invoice for by using either the 'Search' feature or 'All Approved Projects' in your list view.

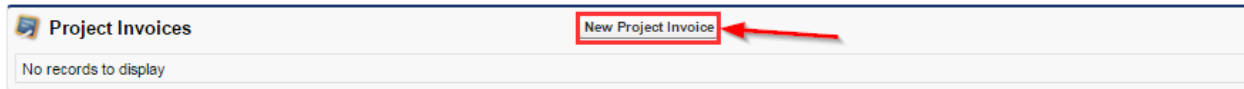
a. Search



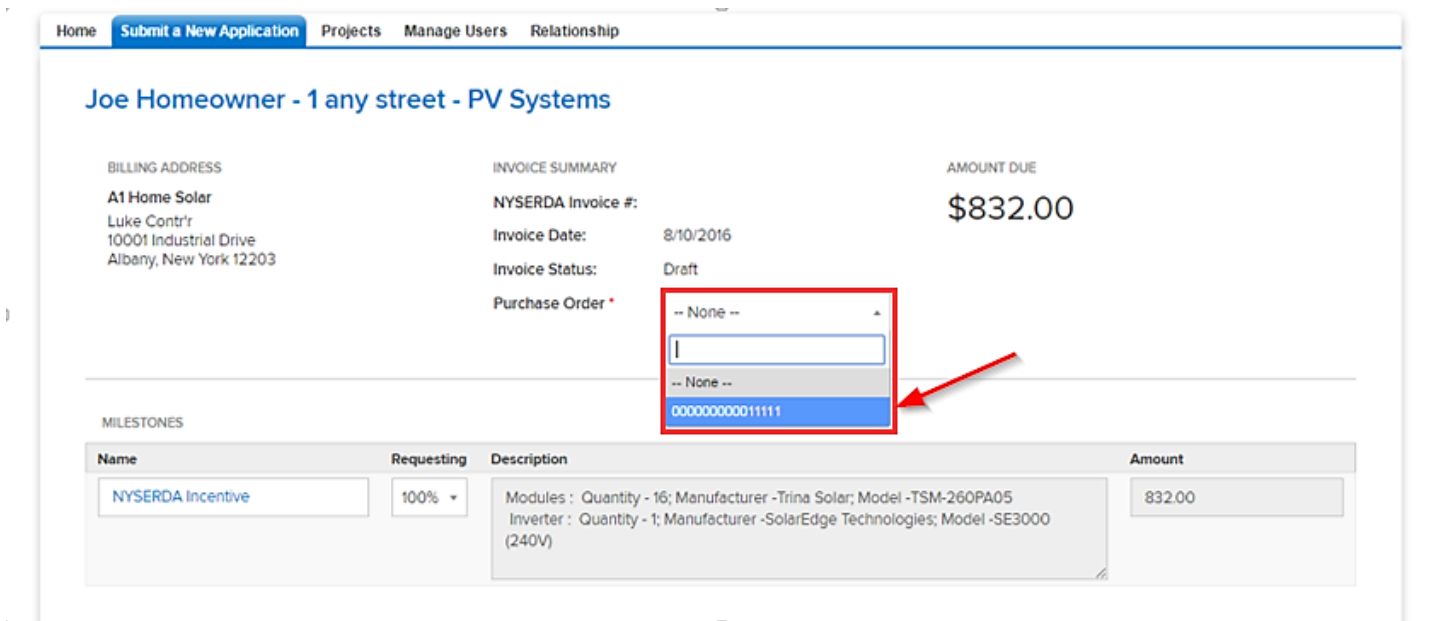
b. List View



4. After finding the project, click on and scroll down to 'New Project Invoice' on the project record.



5. On the Project Invoice, you will need to populate the following fields:
 - a. Purchase Order – most projects will have only one PO to choose from.



Home **Submit a New Application** Projects Manage Users Relationship

Joe Homeowner - 1 any street - PV Systems

BILLING ADDRESS A1 Home Solar Luke Contr'r 10001 Industrial Drive Albany, New York 12203	INVOICE SUMMARY NYSERDA Invoice #: Invoice Date: 8/10/2016 Invoice Status: Draft Purchase Order * -- None -- -- None -- 00000000011111	AMOUNT DUE \$832.00
---	---	-------------------------------

MILESTONES

Name	Requesting	Description	Amount
NYSERDA Incentive	100% ▾	Modules : Quantity - 16; Manufacturer - Trina Solar; Model - TSM-260PA05 Inverter : Quantity - 1; Manufacturer - SolarEdge Technologies; Model - SE3000 (240V)	832.00

- b. Enter the installation and utility interconnection dates from the respective calendar fields.

MILESTONES

Name	Requesting	Description	Amount
NYSERDA Incentive	100% ▾	Modules : Quantity - 16; Manufacturer -Trina Solar; Model -TSM-260PA05 Inverter : Quantity - 1; Manufacturer -SolarEdge Technologies; Model -SE3000 (240V)	832.00

MISCELLANEOUS

Installation Date ⓘ 8/10/2016]

Utility Interconnect Date 8/10/2016]

DESCRIPTION

Customer Invoice #

Invoice Notes

GO BACK **SAVE**

6. If required, you must obtain customer signature using either the built-in electronic signature or print for a hard copy signature.

ELECTRONIC SIGNATURE

GO BACK **PRINT**

7. Click on 'Manage Deliverables' to upload the required supporting documents.
- The documents that you are required to upload will be dependent upon the incentive program you applied to. Incentive adders may require you to upload additional documents at this step.

Note: If your project was approved ‘as noted’, and proof of compliance is required for incentive payment (i.e. new shading report showing tree removal), deliverables can be uploaded under ‘Miscellaneous Document’.

DELIVERABLES (DOCUMENTS)

Deliverable Name	File Name	Upload Date	Action	Approve / Reject	Notes
Final Inspection Certificate	Visit the Manage Deliverables page to add this file.				
Building Permit	Visit the Manage Deliverables page to add this file.				
Utility Interconnect Letter	Visit the Manage Deliverables page to add this file.				
Signed Invoice 25% or 100%	Visit the Manage Deliverables page to add this file.				

[MANAGE DELIVERABLES](#)

b. Choose your files and click on ‘Save’.

Joe Homeowner - 1 any street - PV Systems

NYSERDA INCENTIVE - DELIVERABLES (DOCUMENTS)

Deliverable name	Recent uploaded document	Upload history	Status	Add / update document
Final Inspection Certificate		Attachment History		Choose File Sample PDF.pdf
Building Permit		Attachment History		Choose File Sample PDF.pdf
Utility Interconnect Letter		Attachment History		Choose File Sample PDF.pdf
Signed Invoice 25% or 100%		Attachment History		Choose File Sample PDF.pdf

PREVIOUS

SAVE

8. For Residential & Nonresidential projects, you must agree to the Terms and Conditions of the Certification Statement. Then, click on ‘Submit’.

CERTIFICATION STATEMENT

Customer/Contractor certifies that all approved system components listed above have been delivered to the installation address, and all permits and approvals have been obtained.
 Customer/Contractor certifies that all installation responsibilities have been completed by the Installer/Contractor as outlined in the Solar PV Program Manual. I attest that the PV System is operational, and further agree to notify NYSERDA should the PV system be non-operational for any 4-week period of time going forward.
 Customer has received a copy of the Operations and Maintenance Manual.
 Builder/Contractor has inspected the system to verify it meets all codes and NYSERDA's Program requirements.
 Builder/Contractor has given instruction on the operation of the system to the Customer.
 By signing this form, Customer agrees to release final incentive payment directly to Contractor.
 agree to the Terms and Conditions.

GO BACK

PRINT

EDIT

SUBMIT

9. To view the status of your project invoice, scroll through the project record to the 'Project Invoices' section.

Project Invoices		New Project Invoice		Total Amount Due	Invoice Date
Action	Invoice Number	Status		\$832.00	8/10/2016
Edit	INV-00051899	Pending Program Review			

Project Invoices		New Project Invoice		Total Amount Due	Invoice Date
Action	Invoice Number	Status		\$832.00	8/10/2016
Edit	INV-00051899	Approved			

10. After approval of your project invoice, the status of your project will be updated to 'Completed'.

Project Detail Application Wizard Request for Cancellation Project Modification Request Request Extension

Project Essential

Status Completed		Owner Bob Owner [Change]
Application Number	000076061	Contractor
Project Name	Joe Homeowner - 1 any street - PV Systems	Sub Contractor
Legacy Application #		Total Active Milestone Incentives
Certificate of Occupancy Issued?		\$832.00
Total Remaining Potential Incentive	\$0.00	Program Incentive Block
Risk of Project Termination	<input type="checkbox"/>	Rest of State Residential 9-1