

Project Invoice Reference Guide

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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.

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



Username

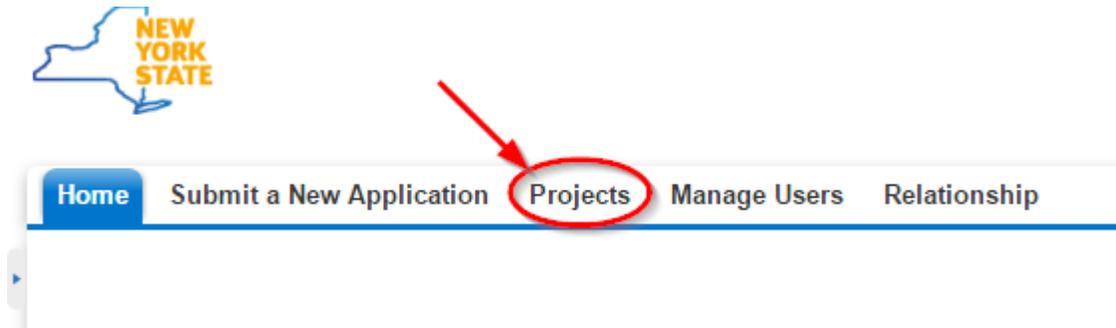
Password

Log In

Remember me

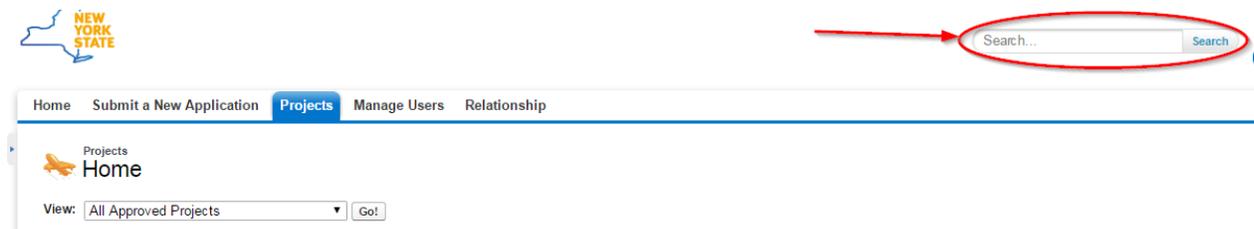
[Forgot Your Password?](#)

2. Click on the 'Projects' tab.

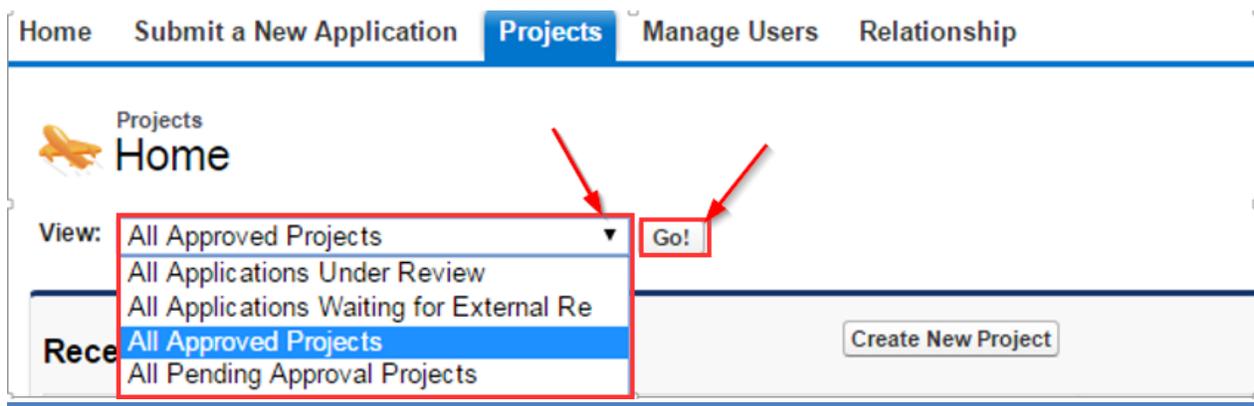


3. Search for the project you wish to submit a project invoice for by using either the 'Search' feature or 'All Approved Projects' in your list view.

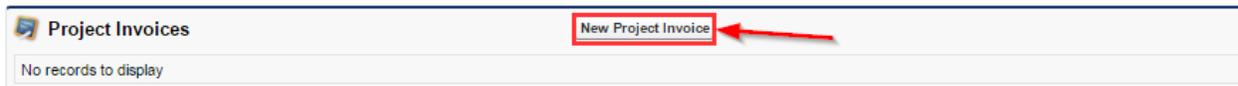
a. Search



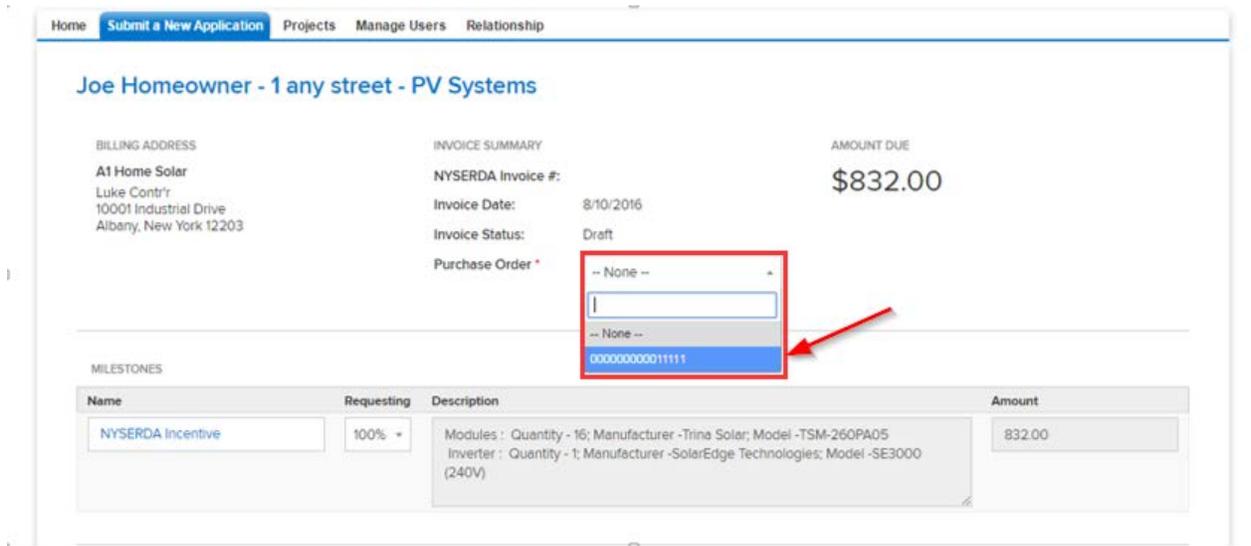
b. List View



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.



- b. The % of incentive you are requesting (100%, 75%, or 25%).
 - i. If 100% or 25%, you will need to select 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 ]

Utility Interconnect Date]

DESCRIPTION

Customer Invoice #

Invoice Notes

GO BACK **SAVE**

- Get customer signature using either the built-in electronic signature or print for a hard copy signature.

ELECTRONIC SIGNATURE

GO BACK **PRINT**

Note: For old Incentive Request Forms that were signed by the customer prior to September 8, you can skip the signature step and proceed to step 7. Here, you will upload the signed Incentive Request Form to the Paperwork Record under 'Signed Invoice'. This will only be allowed until October 10.

- Click on 'Manage Deliverables' to upload the required supporting documents.

- a. The documents that you are required to upload will be dependent upon the % of incentive you are requesting.

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. Agree to the Terms and Conditions of the Certification Statement. Then, click on ‘Submit’.

