



# GoGreen Home Portal

## How to Create a Contractor Account & Add Users

### Getting Started – Enroll in GoGreen Home

You must be enrolled in GoGreen Home to use the GoGreen Home Portal. For more information about enrolling in GoGreen Home, please visit this page: [gogreenfinancing.com/partners/contractor-partners/home/](https://gogreenfinancing.com/partners/contractor-partners/home/)

### How to Log On

Follow this link to create your account and log on: [https://gogreenportal.treasurer.ca.gov/users/sign\\_in](https://gogreenportal.treasurer.ca.gov/users/sign_in)

### Creating Your User Account

**Note:** Only create a Contractor Account once for your company. To add new users, your company's GoGreen Home Portal Account Administrators (the person who creates the account and/or users who are designated as Administrators) must log in and add them.

1. At the log in page, click **New Contractor? Sign up here.**

The screenshot shows the login page for the GoGreen Home Portal. At the top, there are logos for 'gogreen FINANCING' and 'n•GEN National Green Energy Network'. Below the logos is the heading 'Sign in'. There are two input fields: 'Email' and 'Password'. Below the 'Password' field is a checkbox labeled 'Remember me'. There is a blue 'Log in' button and a link that says 'Forgot your password?'. At the bottom of the form, there is a link that says 'New Contractor? Sign up here.' which is highlighted with a red rectangular box.

2. At the **Step 1 - Contractor Profile** page, fill in all required fields and then click **Continue** at the bottom of the page.
3. At the **Step 2 - New User Account** page, fill in all required fields and then click **Create My Account and Contractor Profile** at the bottom of the page.
4. The next page is the **Programs** page. Click **Apply to Program** to link your account with GoGreen Home.



The screenshot shows the GoGreen Home portal interface. At the top, there is a navigation bar with the GoGreen logo, 'Dashboard', 'Jobs', 'Customer Reviews', and 'Resources'. On the right, it says 'Premier Installer...' and 'Carmen B.' with a dropdown arrow. Below the navigation bar, the heading 'Programs' is displayed. A message states: 'Each program may have its own unique requirements. You can start an application now and finish it later (make sure to click the "Save Progress" button).' A yellow banner below this message reads: 'You have not applied to any Programs yet. In order to be approved for Jobs and listed in the Contractor Directory, please apply to one or more Programs below.' The main content area features a card for 'GoGreen Home' with a 'GoGreen' tag. Below the card, it says 'GoGreen Home connects Californians with energy upgrade contractors and affordable, accessible financing.' A blue button labeled 'Apply to Program' is highlighted with a red rectangular box.

5. At the GoGreen Home Application page, fill in the required information, agree to the Program Agreement, and then click **Next** at the top right-hand corner of the page.
6. Then click **Submit Program Application**.
7. Upon receipt of the application, the GoGreen Home Team will review it and ensure you are already enrolled in GoGreen Home. You will receive notice of whether your application to access the Portal is approved or not within 48 hours of your submission.

This screenshot shows the GoGreen Home portal after an application has been submitted. The navigation bar is identical to the previous screenshot. Below the 'Programs' heading, a green progress bar indicates 'Submitted' with a checkmark icon, and 'Pending Authorization by GoGreen Home Program Tea' is shown to the right. The 'GoGreen Home' card now includes a 'View Application' button. Below the card, there is a link that says 'Questions about this program? Send us a message'.

## Adding Users to Your Contractor Account

The User who sets up the Contractor Account is automatically designated in the Portal as an Administrator. Administrators can add other User Accounts, such as office staff who will be handling documentation and interacting with Lenders and the GoGreen Home Team.

To add new Users Accounts, click your username in the top right panel and then click **User Accounts**.



The screenshot shows the GoGreen Financing dashboard. At the top right, the user 'Kellen J.' is logged in. A dropdown menu is open, showing options: My Profile, Contractor Profile, Programs, Badges and Assets, Reports, **User Accounts** (highlighted with a red box), and Log Out. Below the menu is a table of jobs.

Job #	Job Status	Customer	Address	Project Cost	Last Up
#100078	Pending Completion	Cameron Johnson	566 West Lane	\$10,000.00	7/16/20
#100077	Pending Completion	Customer Tamara Green	222 West Street	\$19,500.00	7/16/20
#100076	Draft				7/15/20
#100075	Draft				7/14/2024 09:21 PM PDT

At the **User Accounts** page, click **New User** to create a new User Account.

The screenshot shows the 'User Accounts' page. A 'New User' button is highlighted with a red box. Below it is a table with columns: Name, Email, Role, and Last login.

Name	Email	Role	Last login
Kellen James	kellen@email.com	Administrator	

At the New User page, fill in the required fields. Make sure you identify the new User Account as either a “Staff” Account (can submit project data, can send messages, can sign forms) or an “Administrator” Account (has all the same user permissions as Staff Accounts, but can also create and delete other User Accounts). When you are finished, click **Save User** at the bottom of the page.

The screenshot shows the 'New User' form. The 'Role' dropdown menu is highlighted with a red box, showing options: Staff, **Administrator** (selected), and Staff.

Fields include: First name \*, Last name \*, Job title, Role \*, Phone, and Email \*.