FPL DSM Contractor Portal

User Guide for Participating Independent Contractors (PICs)

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DSM Contractor Portal – User Guide for PICs

Table of Contents

Introduction

User Access

Rebate Request

Help & Support

Payment Research

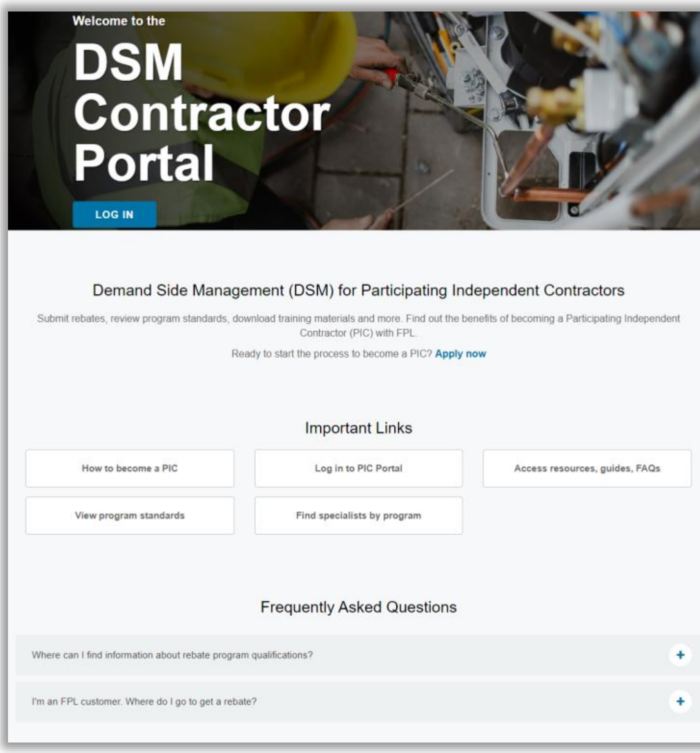
DSM Contractor Portal – User Guide for PICs

Overview

This user guide has been prepared by Florida Power & Light Company exclusively for use by its Participating Independent Contractors (PICs).

It contains instructions for accessing and using the DSM Contractor Portal via www.fpl.com to:

- Submit a New Rebate Request
- View the Status of a Submitted Request
- Request Help & Support
- \+ more



PICs are required to process their rebate request online, using the FPL DSM Contractor Portal. The DSM Contractor Portal, powered by Salesforce, is a secure collection of information and applications.

Submitting rebate requests via the DSM Contractor Portal will provide the following benefits:

- Reduce paperwork errors.
- Ability to view rebates requests in real-time.
- Access your electronic records of rebate requests submitted for the current year and previous two years.

Reminder: Per the Demand Side Management Contract, PICs are required to maintain original documents for a period of two (2) years from the date the work was installed.

Important: An email will be sent to you with a link to the **FPL DSM Contractor Portal** for login. Additionally, a separate email will be sent with your log-in credentials.

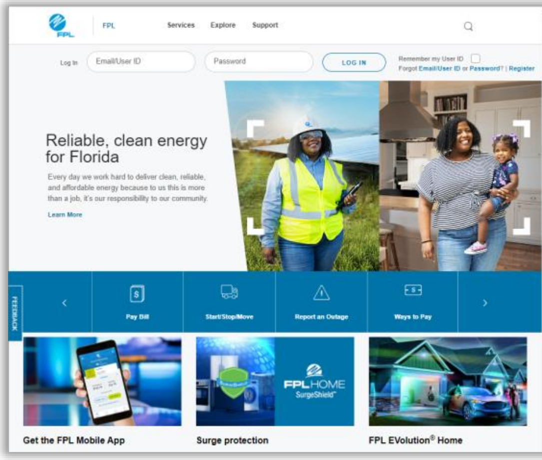
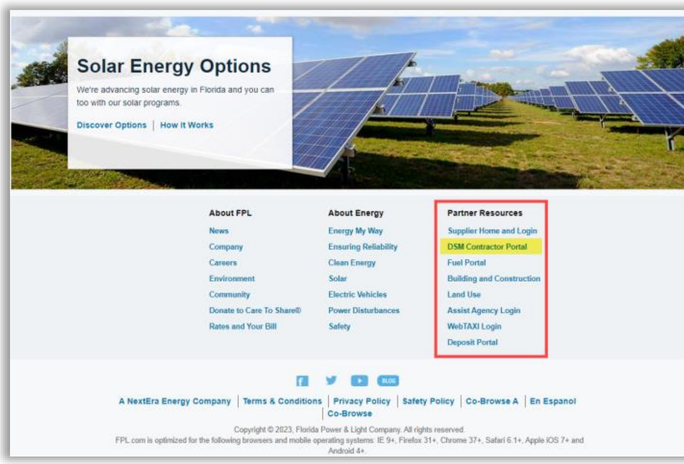
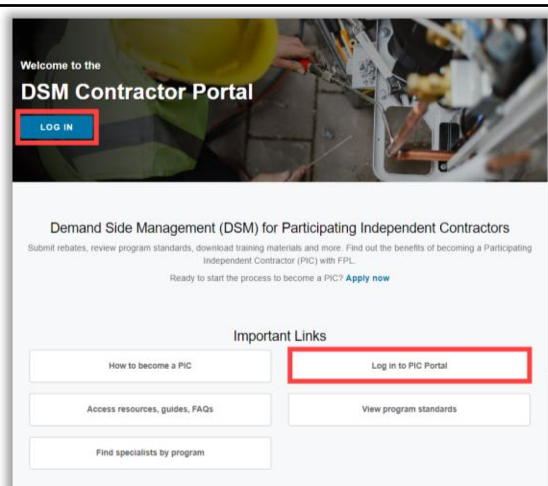
Getting Started

The table below provides an overview of the type of request PICs will be able to complete via the **FPL DSM Contractor Portal**.

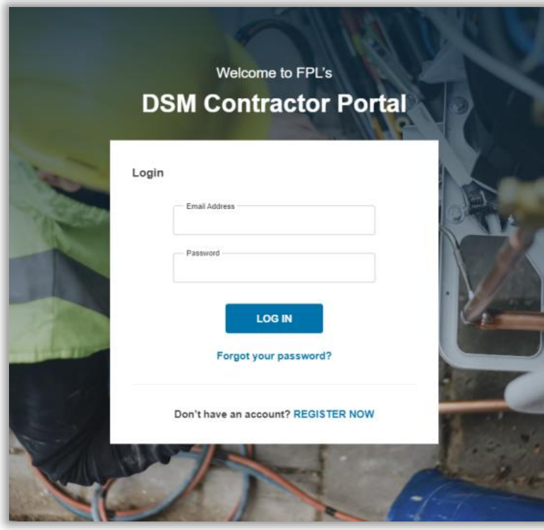
Request Type	Description
New Rebate Request	Allows the user to initiate a rebate request for the various DSM programs.
View the Status of a Submitted Rebate	Allows the user to check on the status of a submitted rebate request.
Request for Help & Support	Allows the user to submit profile updates such as: • Add/Update Insurance Information • Add/Update License Information • Business Address Change • Company Information Change • Update County Information • Update Contact Details • Add/Update Payment Method • Add an Additional Location

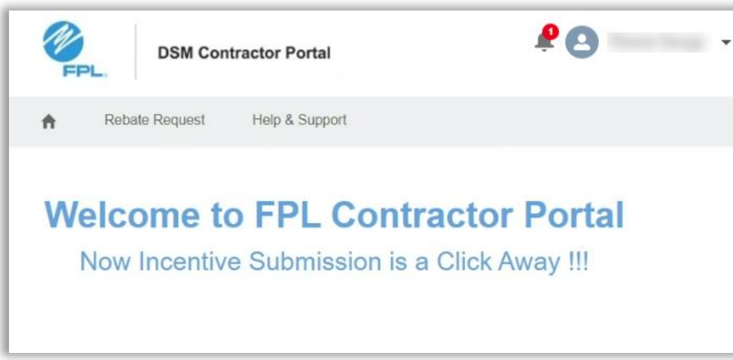
Accessing the DSM Contractor Portal

Directions: Use the steps below to access the DSM Contractor Portal.

Step	Action	
1	Access the www.fpl.com	
2	• Scroll down to the bottom of the website and locate Partner Resources • Click “DSM Contractor Portal”	
3	From the DSM Contractor Portal page, select the Log in button within the welcome banner/image **Note:** Portal can *also* be accessed by selecting into the “Log in to PIC Portal” link located within the Important Links section.	

Step	Action	

4	From the DSM Contractor Portal,
	• Enter your log in credentials:
	    • Email Address
	    • Password
	• Click Log In
		

5	The DSM Contractor Portal will display	

Note:

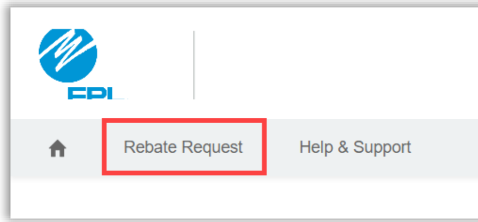
- For password reset select the “Forgot your password” link and follow prompting.
- If you are not a registered PIC, refer to the Become a PIC Portal user guide.

Initiate New Rebate Request

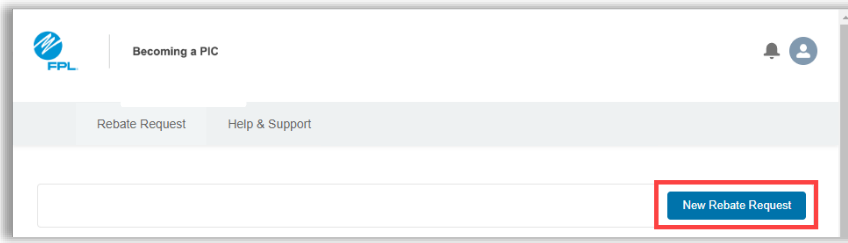
Directions: Use the steps below to initiate a new rebate request via the FPL DSM Contractor Portal.

Important: Ensure all required documents are obtained prior to initiating the rebate request.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Select Rebate Request from the grey toolbar

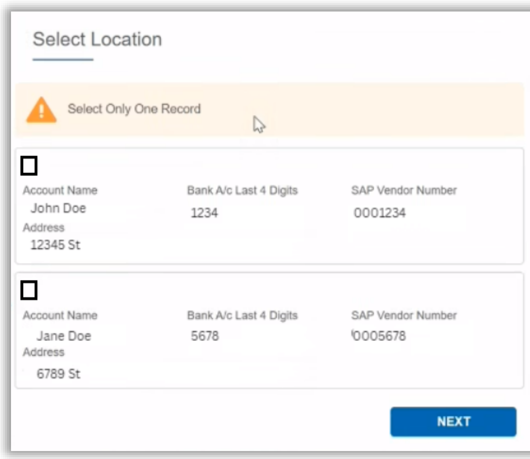


</td></tr>
<tr><td>2</td><td>Click the New Request Rebate button



</td></tr>
<tr><td>3</td><td>If applicable, select your location by selecting the relevant checkbox then click on the Next button to continue

Important: This step will only appear for PIC’s with multiple locations.



</td></tr>
<tr><td>4</td><td>Select the link from the table to obtain required steps based on the program the rebate is being submitted for:

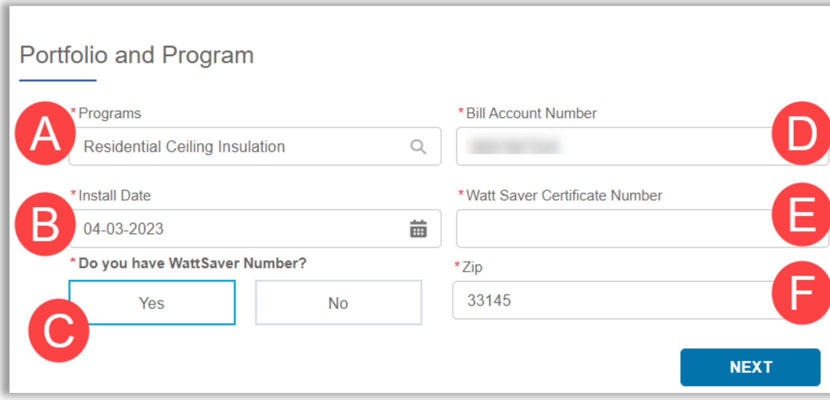
<table>
<tr><th>Program Name</th></tr>
<tr><td>Residential Ceiling Insulation</td></tr>
<tr><td>Residential HVAC</td></tr>
<tr><td>Low Income</td></tr>
<tr><td>Low Income – Power to Save</td></tr>
</table>
</td></tr>
</table>

Residential Ceiling Insulation (RCI) Rebate Request

Directions: Use the steps below to submit a new rebate request for the RCI Program.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>

- Complete the **Portfolio and Program** section
- Refer to the table below for details on what to complete
- Select **Next**



<table>
<tr><th>Section</th><th>Details to enter</th></tr>
<tr><td>A. Program</td><td>Select the applicable program (e.g., Residential Ceiling Insulation)</td></tr>
<tr><td>B. Install Date</td><td>Enter the installation date</td></tr>
<tr><td>C. Do you have WattSaver Number</td><td>Allows user to enter a WattSaver number if applicable

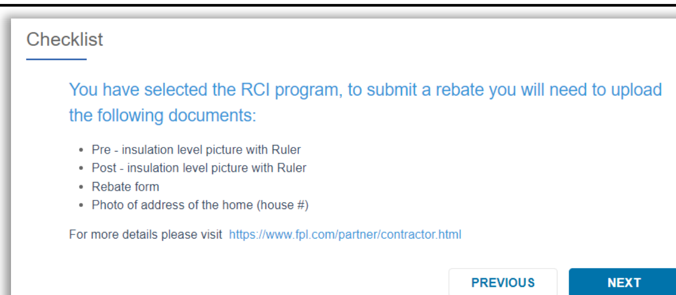
Note: If No is selected, the option to “Download RCI Rebate Certificate” will display.</td></tr>
<tr><td>D. Bill Account Number</td><td>Enter the 10-digit bill account number (include any leading zero's)</td></tr>
<tr><td>E. Watt Saver Certificate Number</td><td>Field is displayed if Yes, was selected for having the WattSaver Number

Important: When entering a WattSaver number, ensure you are entering the whole number including the preceding zeros.</td></tr>
<tr><td>F. Zip</td><td>Enter the zip code for the bill account

Note: Field is displayed if No, was selected for having the WattSaver Number.</td></tr>
</table>

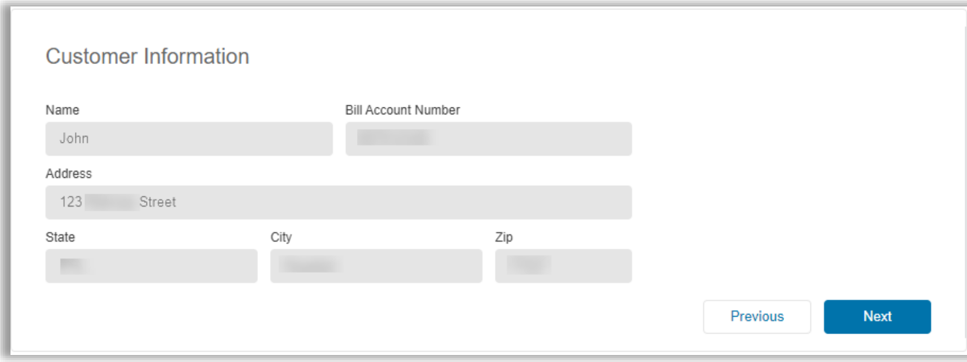
</td></tr>
<tr><td>2</td><td>

- Review the **Checklist** step
- Select **Next**

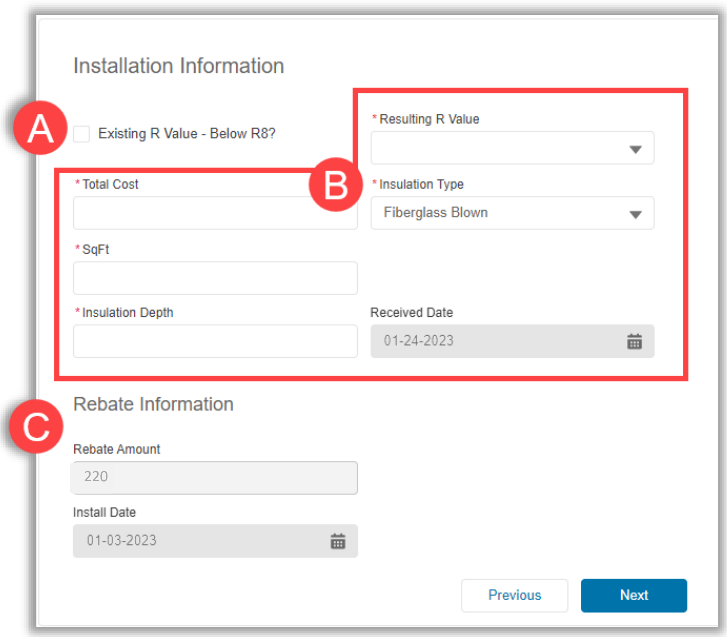


</td></tr>
</table>

Step	Action
3	• Review the **Customer Information** section • Ensure details are correct • Select **Next** **Note:** If incorrect, select the Previous button and modify the Bill Account number.



Step	Action
4	• Complete the **Installation Information** section • Refer to the table below for details on what to complete • Select **Next**

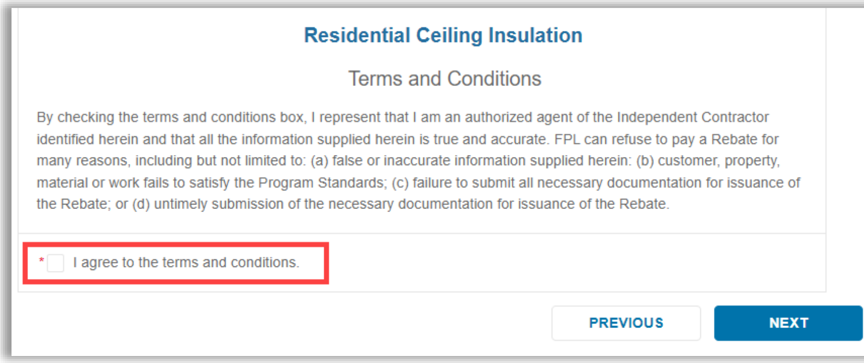


Section	Details to enter
A. Existing R Value	Select checkbox to confirm existing R Value was below R8
B. Install details	Enter details – all fields are required
C. Rebate Information	No action needed – details will auto-populate

DSM Contractor Portal – User Guide for PICs

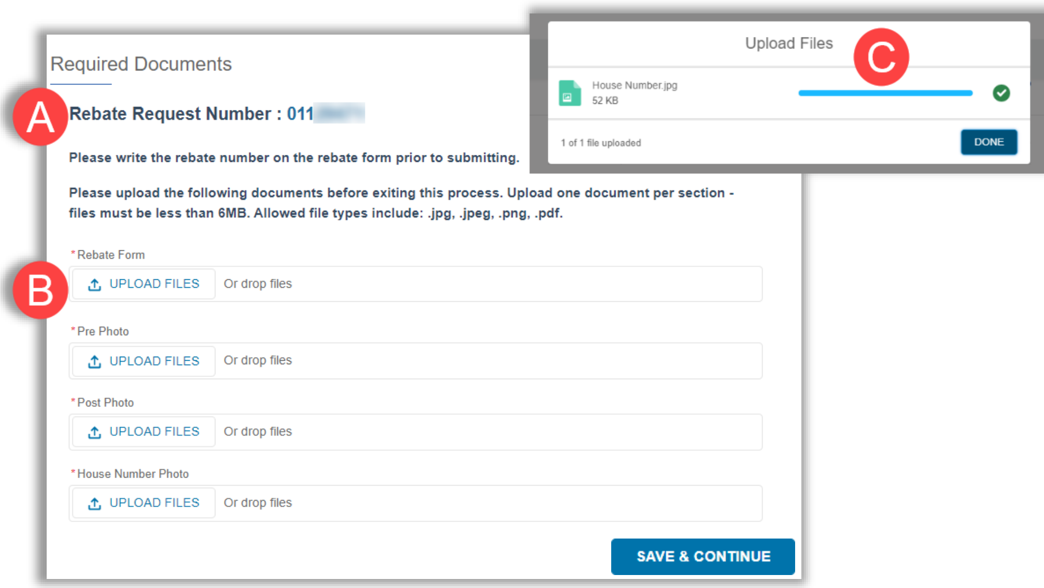
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5</td><td>

- Review the **Terms and Conditions** section
- Select the checkbox acknowledging the terms
- Select **Next**



</td></tr>
<tr><td>6</td><td>

- Complete the **Required Document** section
- Refer to the table below for details on what to complete
- Select **Save & Continue** once the required documents are uploaded



<table>
<tr><th>Section</th><th>Details</th></tr>
<tr><td>A. Rebate Request Number</td><td>• Make note of the rebate request number
• Ensure it is displayed within the RCI Rebate Certificate</td></tr>
<tr><td>B. Required Documents</td><td>Select the Upload Files button to upload all required documents</td></tr>
<tr><td>C. Upload Files</td><td>• Displays as file is being uploaded
• Will confirm whether the file was successfully updated or not

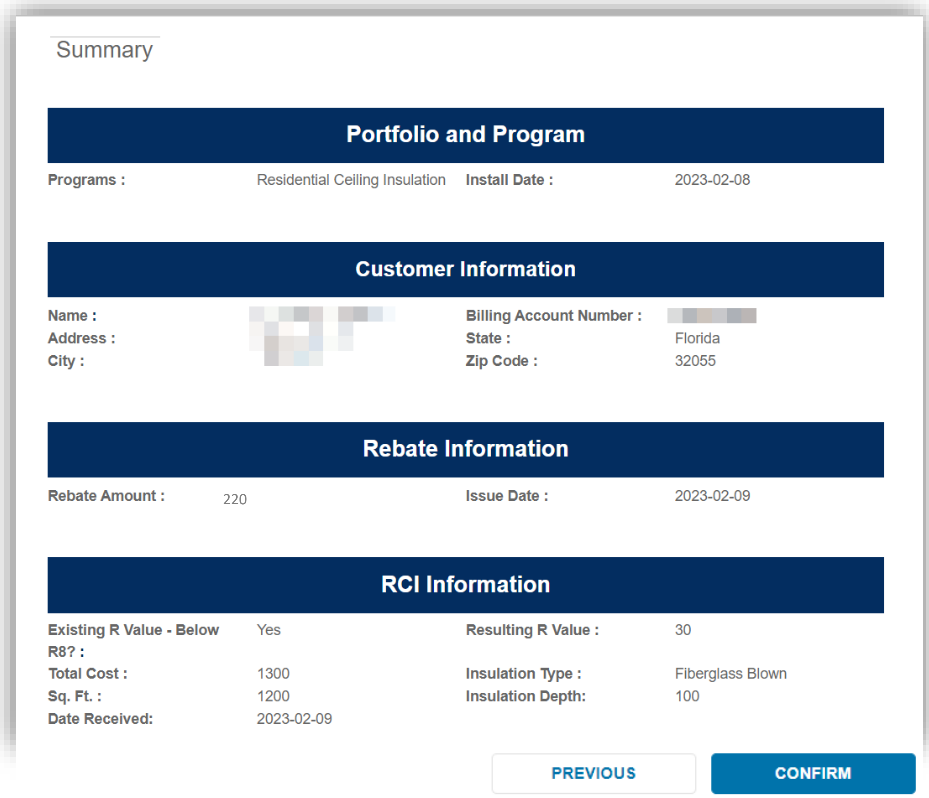
Note: File format allowed for upload include JPG, JPEG, PNG and PDF. Additionally, files must be less than 6MB.</td></tr>
</table>

</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>7</td><td>

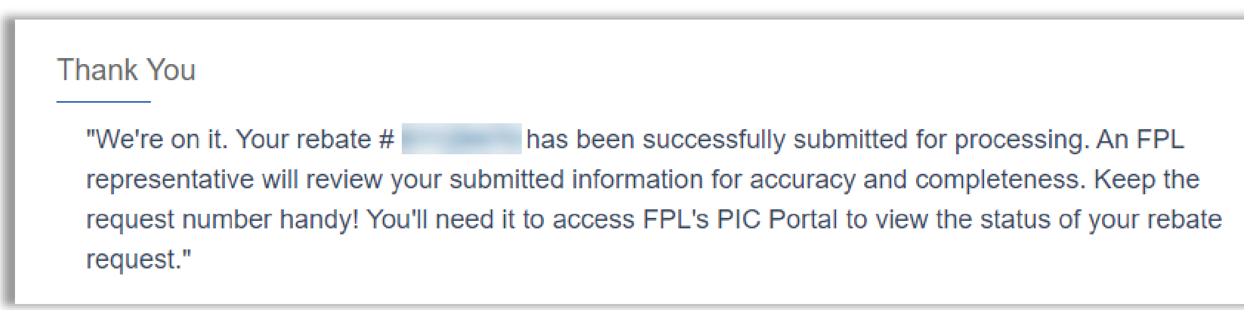
- Review the **Summary** section
- Select **Confirm**

Note: If needed, users will be able to print the Summary page.



</td></tr>
<tr><td>8</td><td>

- RCI Rebate Request submitted
- Review the Thank you page



</td></tr>
</table>

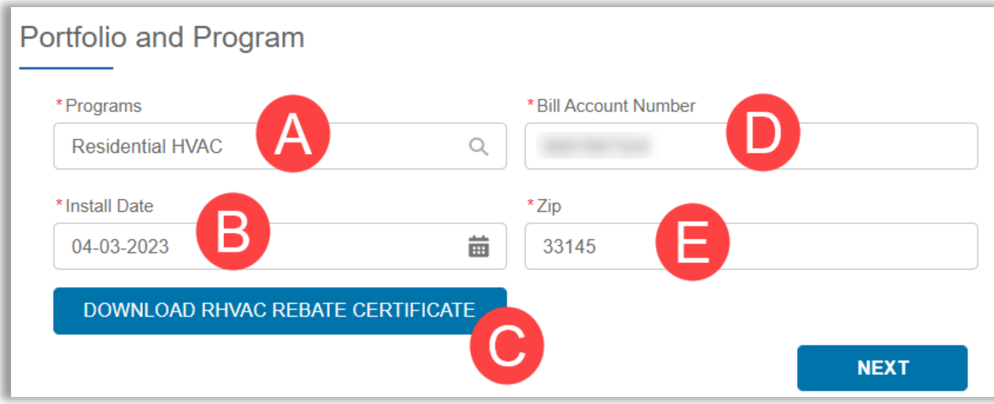
Residential HVAC Rebate Request

Directions: Use the steps below to submit a new rebate request for the Residential HVAC Program.

Step	Action

Step 1

- Complete the **Portfolio and Program** section
- Refer to the table below for details on what to complete
- Select **Next**

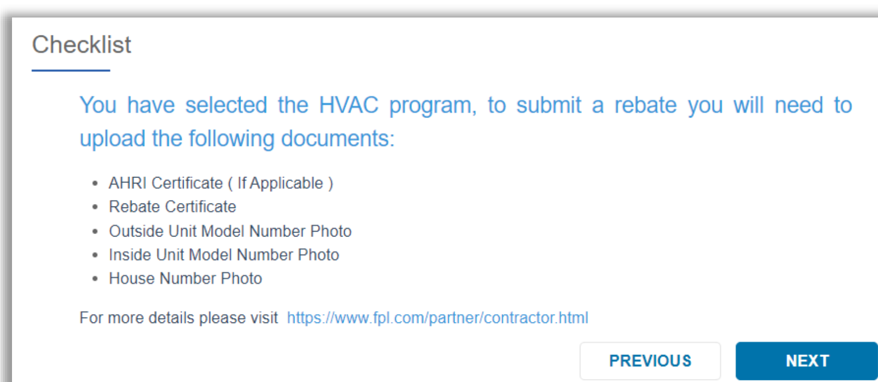


Section	Details to enter
A. Program	Select the applicable program (e.g., Residential HVAC)
B. Install Date	Enter the installation date
C. Download RHVAC Rebate Certificate	Allows user to download the rebate certificate **Reminder:** Certificate must be signed by the customer.
D. Bill Account Number	Enter the 10-digit bill account number (include any leading zero's)
E. Zip	Enter the zip code for the bill account

Reminder: RHVAC rebates must be submitted within 30 days of installation.

Step 2

- Review the **Checklist** step
- Select **Next**

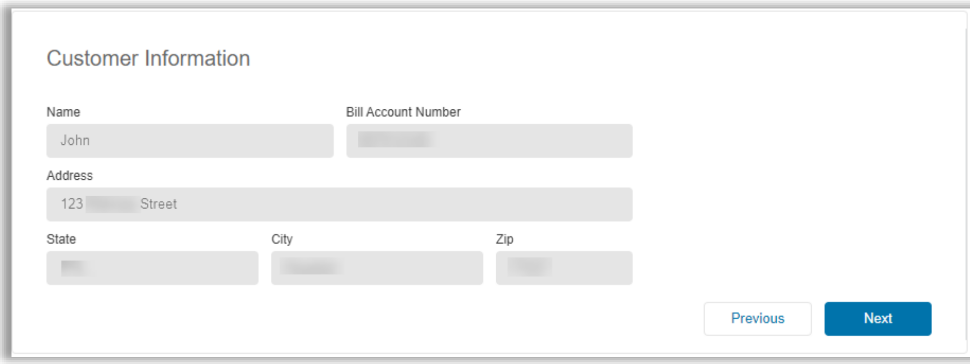


Step	Action

3

- Review the **Customer Information** section
- Ensure details are correct
- Select **Next**

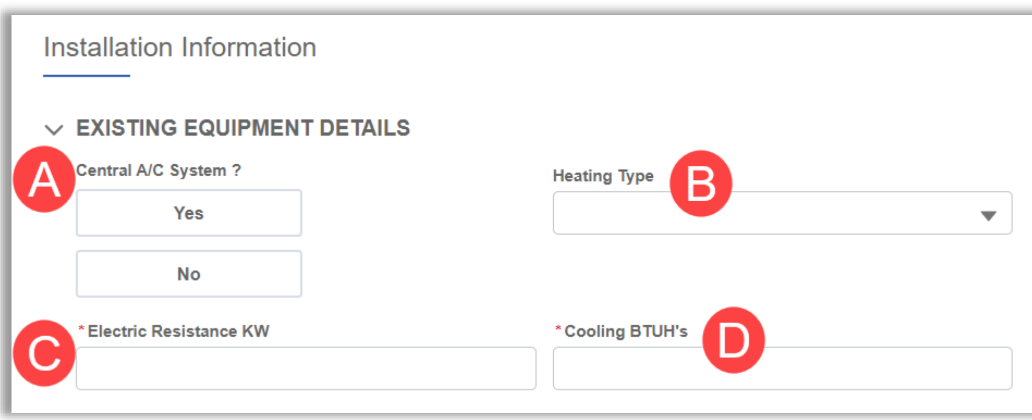
Note: If incorrect, select the Previous button and modify the Bill Account number.



4

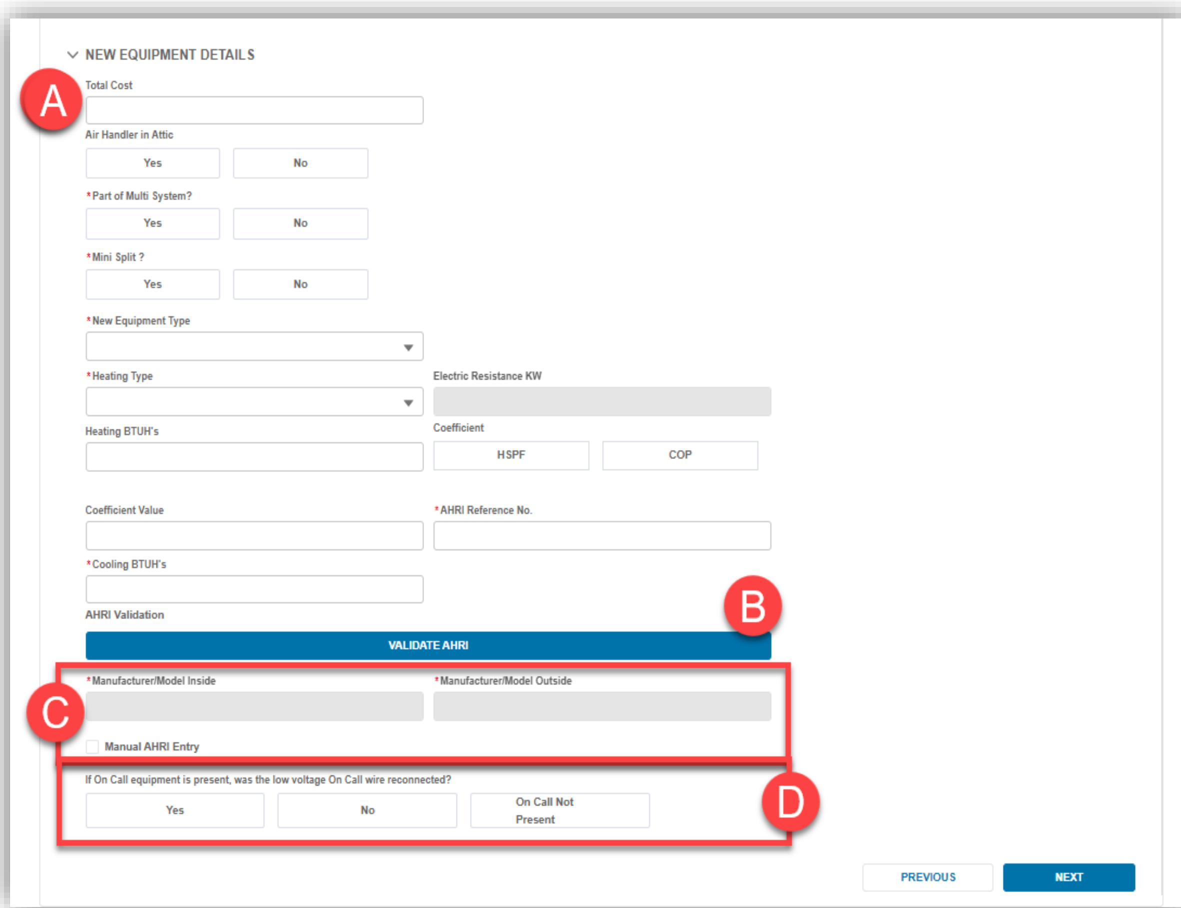
- Compete the **Installation Information** section
- Refer to the table below on what to complete within Existing Equipment Details
- Scroll down to complete the next section

Note: Fields are dynamic based on the Heating Type selected.



Section	Details to enter
A. Central A/C System	Select Yes or No **Note:** If Yes, is selected, then the *Cooling BTUH's* are required.
B. Heating Type	Select applicable type
C. Electric Resistance KW	Enter details if applicable **Note:** Field is dynamic based on the Heating Type selected.
D. Cooling BTUH's	Allows user to enter the Cooling BTUHs

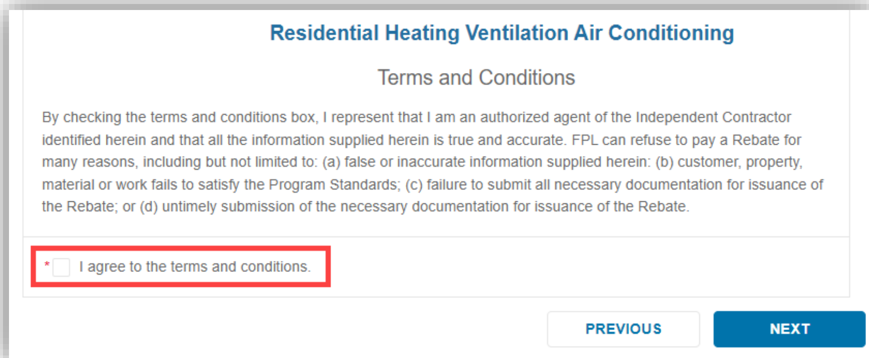
Step	Action
5	• Compete the **New Equipment Details** section of the **Installation** step • Refer to the table below for details on what to complete • Select **Next** **Note:** Fields are dynamic based on the equipment type selected.



Section	Details to enter
A. Details	Enter all required details identified with a red asterisk
B. Validate AHRI	When selected, will validate information entered **Note:** If validation fails, select the *Manual AHRI Entry* checkbox.
C. Manual AHRI Entry	When selecting the checkbox, the fields will enable for entry
D. On Call Details	For premises with On Call present, indicate if the On Call wire was reconnected **Note:** If No, was selected, the Reason field will display.

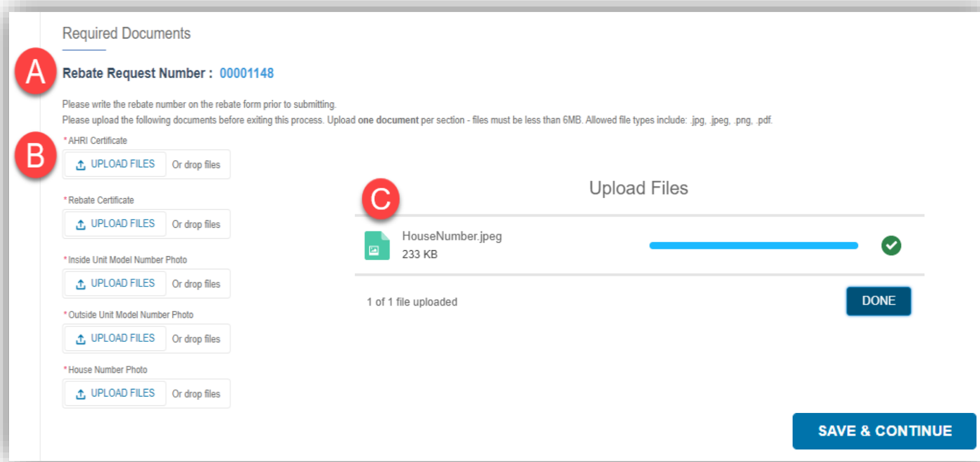
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>6</td><td>

- Review the **Terms and Conditions** section
- Select the checkbox acknowledging the terms
- Select **Next**



</td></tr>
<tr><td>7</td><td>

- Complete the **Required Document** section
- Refer to the table below for details on what to complete
- Select **Save & Continue** once the required documents are uploaded



<table>
<tr><th>Section</th><th>Details</th></tr>
<tr><td>A. Rebate Request Number</td><td>

- Make note of the rebate request number
- Ensure it is displayed within the RHVAC Rebate Certificate

</td></tr>
<tr><td>B. Required Documents</td><td>Select the Upload Files button to upload all required documents

Important: If the AHRI # was entered manually then the AHRI Certificate is required to be uploaded.</td></tr>
<tr><td>C. Upload Files</td><td>

- Displays as file is being uploaded
- Will confirm whether the file was successfully updated or not

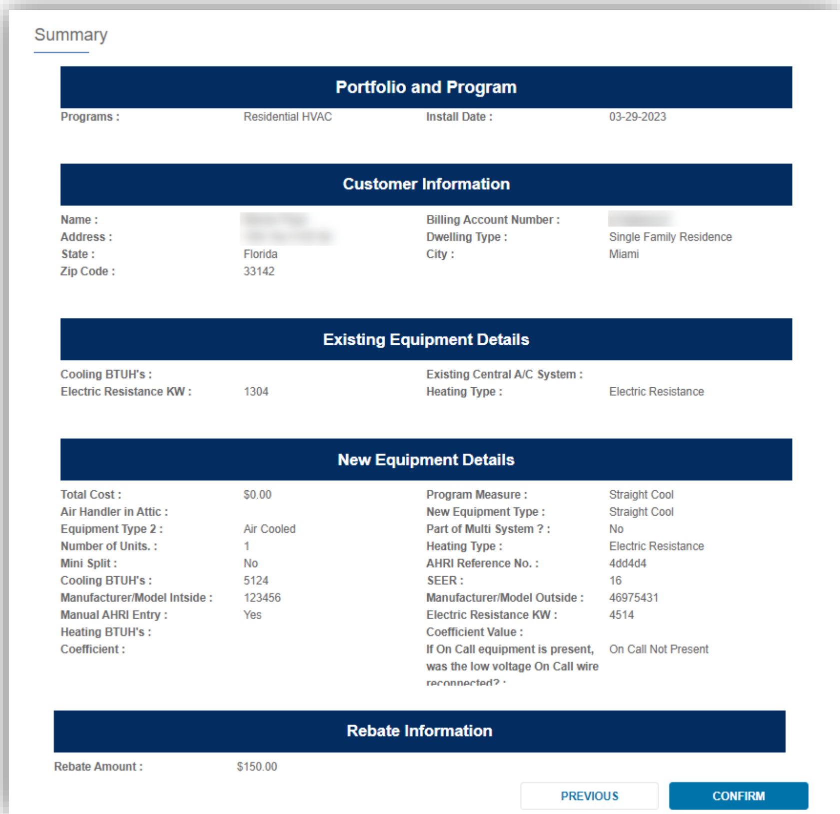
Note: File format allowed for upload include JPG, JPEG, PNG and PDF. Additionally, files must be less than 6MB.

</td></tr>
</table>

</td></tr>
</table>

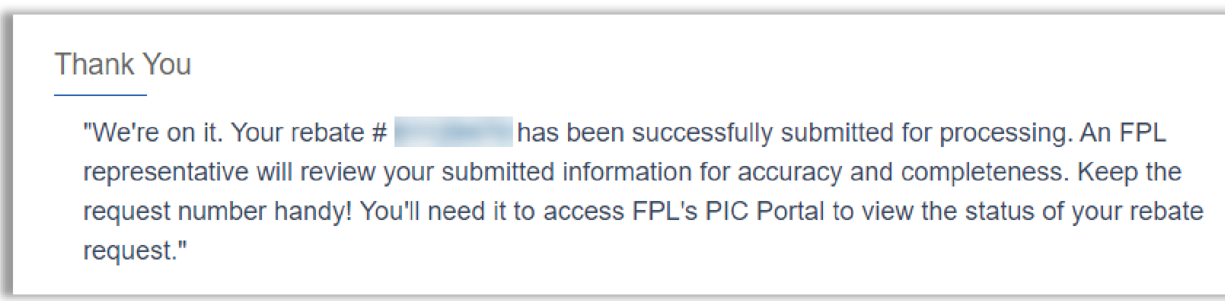
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>8</td><td>

- Review the **Summary** section
- Select **Confirm**



</td></tr>
<tr><td>9</td><td>

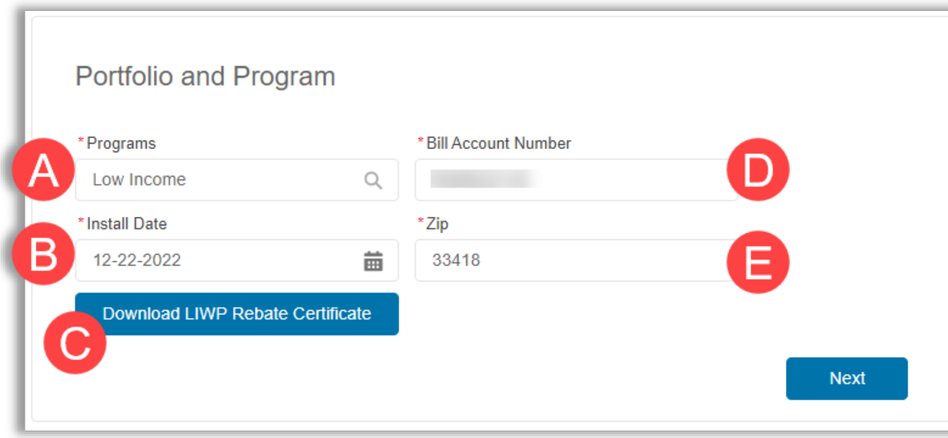
- RHVAC Rebate Request submitted
- Review the Thank you page



</td></tr>
</table>

<table>
<tr><th colspan="2">LIWP Rebate Request</th></tr>
<tr><td colspan="2">Directions: Use the steps below to submit a new rebate request for the Low Income Weatherization Program.</td></tr>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>

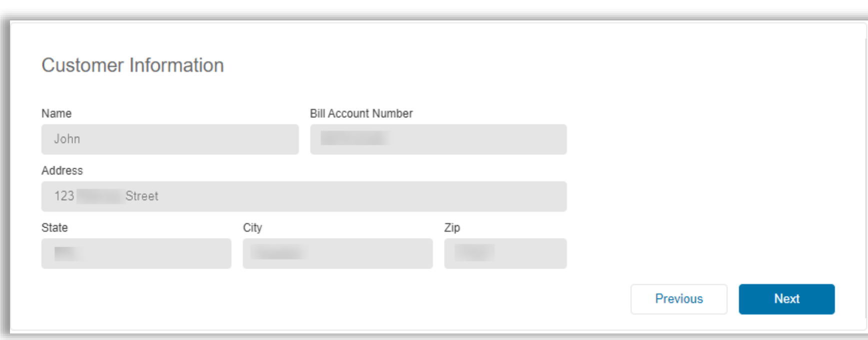
Complete the Portfolio and Program section
Refer to the table below for details on what to complete
Select Next



<table>
<tr><th>Section</th><th>Details to enter</th></tr>
<tr><td>A. Program</td><td>Select the applicable program (e.g., Low Income)</td></tr>
<tr><td>B. Install Date</td><td>Enter the installation date</td></tr>
<tr><td>C. Download LIWP Rebate Certificate</td><td>Allows user to download the rebate certificate</td></tr>
<tr><td>D. Bill Account Number</td><td>Enter the 10-digit bill account number (include any leading zero's)</td></tr>
<tr><td>E. Zip</td><td>Enter the zip code for the bill account</td></tr>
</table>
</td></tr>
<tr><td>2</td><td>

Review the Customer Information section
Select Next

Note: If incorrect, select the Previous button and modify the Bill Account number.

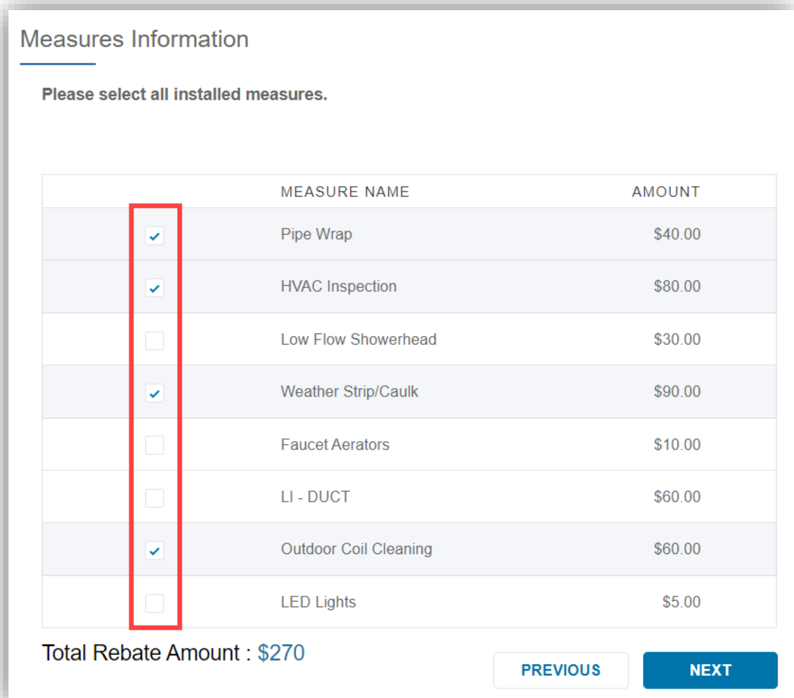


</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>

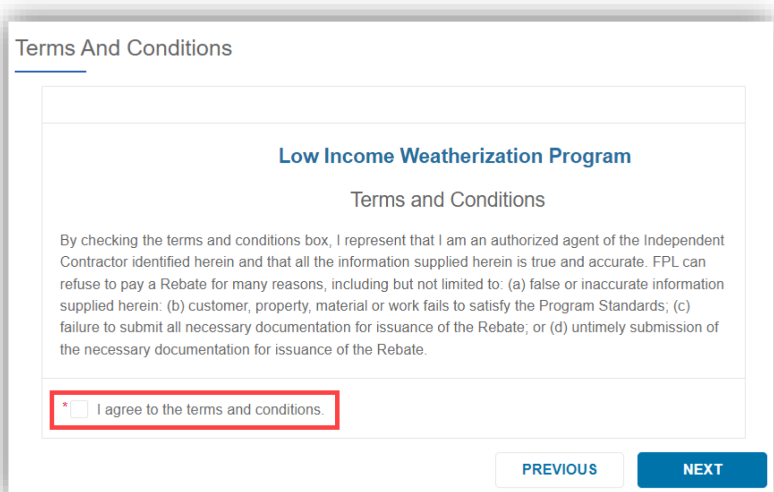
- Complete the **Measure Information** section
- Select the checkbox for all installed measures
- Select **Next**

Note: The Total Rebate Amount will auto-populate based on the selections made.



</td></tr>
<tr><td>4</td><td>

- Review the **Terms and Conditions** section
- Select the checkbox acknowledging the terms
- Select **Next**

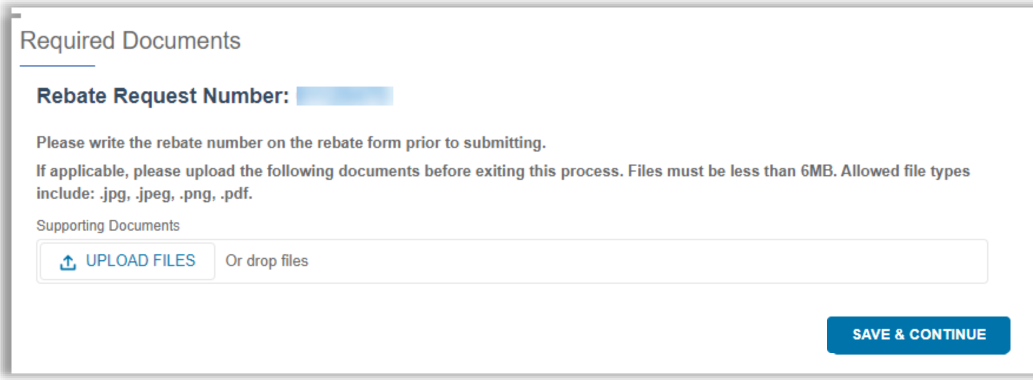


</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5</td><td>

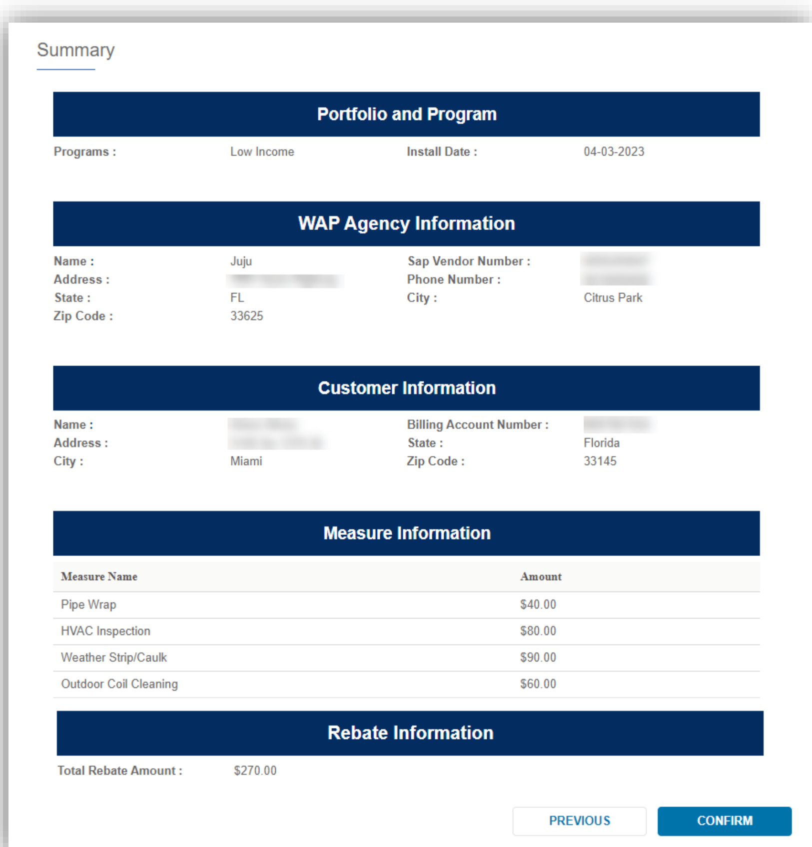
- If applicable, upload any supporting documents within the **Required Document** section
- Select **Save & Continue** to proceed

Note: File format allowed for upload include JPG, JPEG, PNG and PDF. Additionally, files must be less than 6MB.

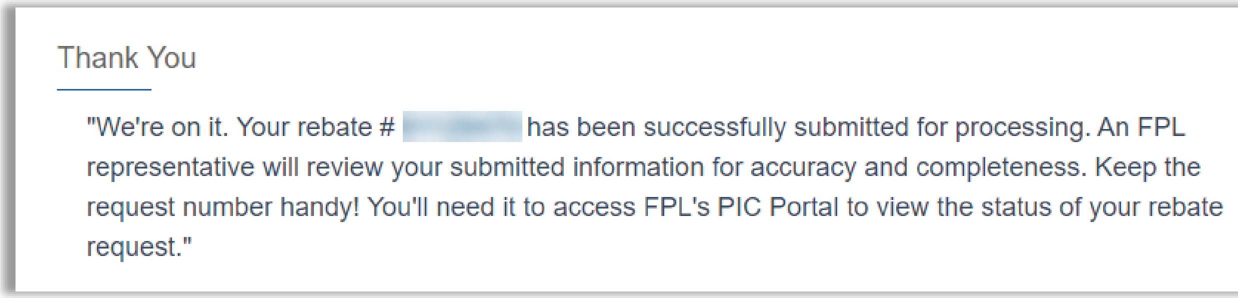


</td></tr>
<tr><td>6</td><td>

- Review the **Summary** section
- Select **Confirm**



</td></tr>
</table>

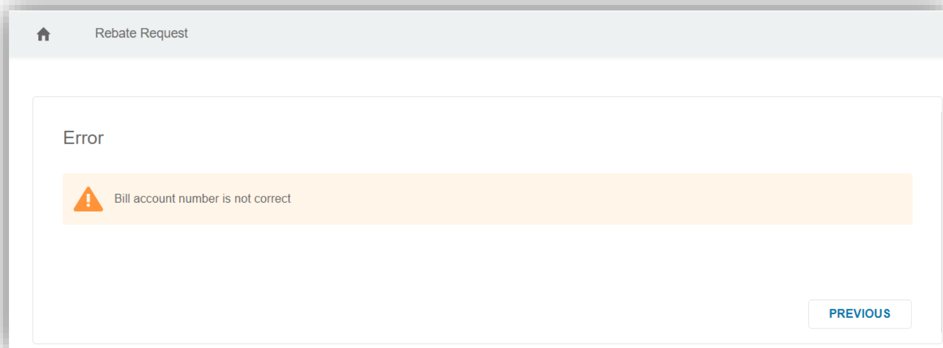
Step	Action
7	• LIWP Rebate Request submitted • Review the Thank you page **Reminder:** The rebate # can be used to view the status of your rebate request. 

Error and Warning Messages

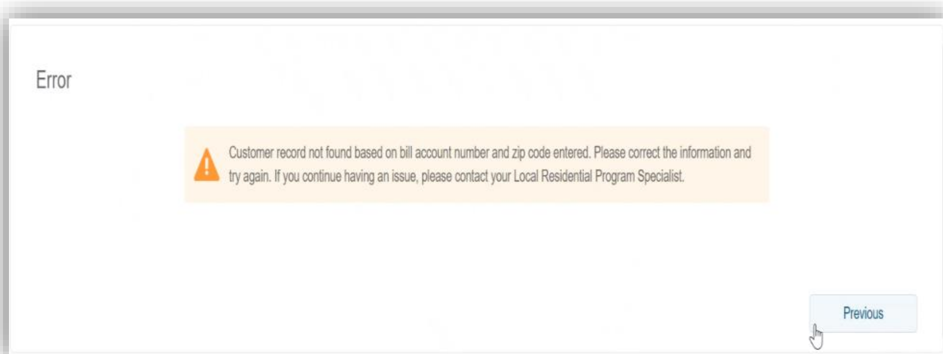
Below are examples of the various error and warning messages you *may* encounter when submitting a rebate request.

Examples

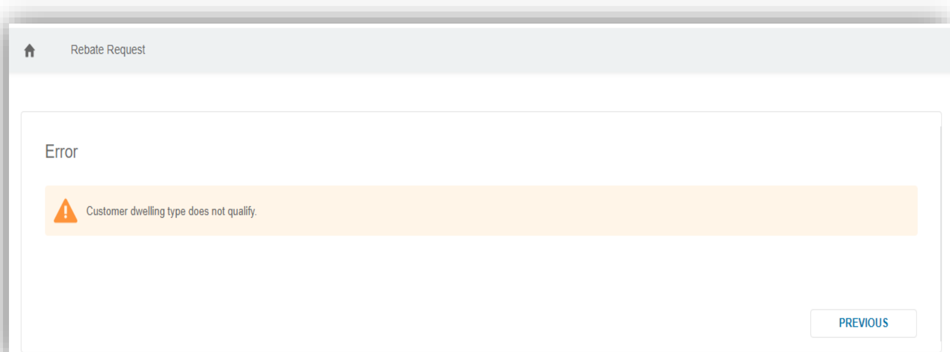
- Incorrect Bill Account Number Entered



- Incorrect Zip Code Entered

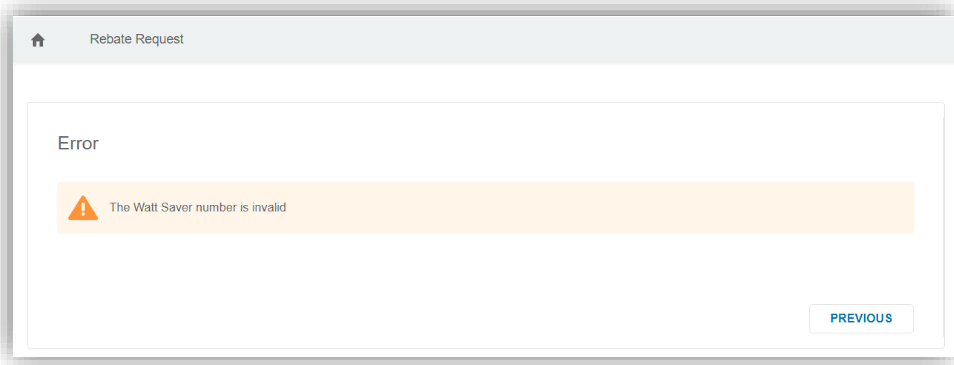


- Dwelling Type Does Not Qualify

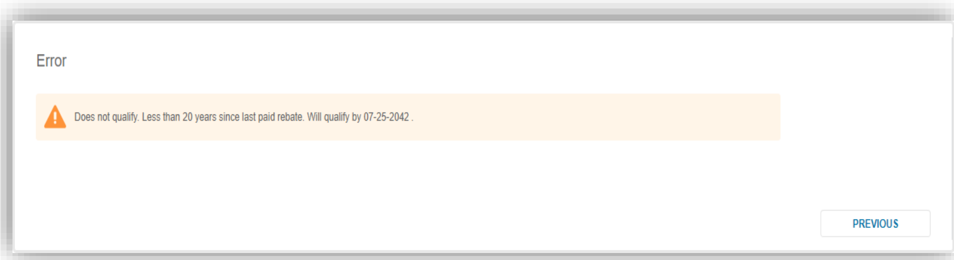


Examples
• Watt-Saver Number is Invalid
• Rebate Already Redeemed

• Watt-Saver Number is Invalid



• Rebate Already Redeemed



Rebate Requests History

The Rebate Request History section of the **FPL DSM Contractor Portal**, allows the PIC to view previously submitted rebates.

Important: PICs are required to monitor the statuses of their rebates for potential errors such as: Paperwork error.

Directions: Use the steps below to access and navigate through the Rebate Requests History section.

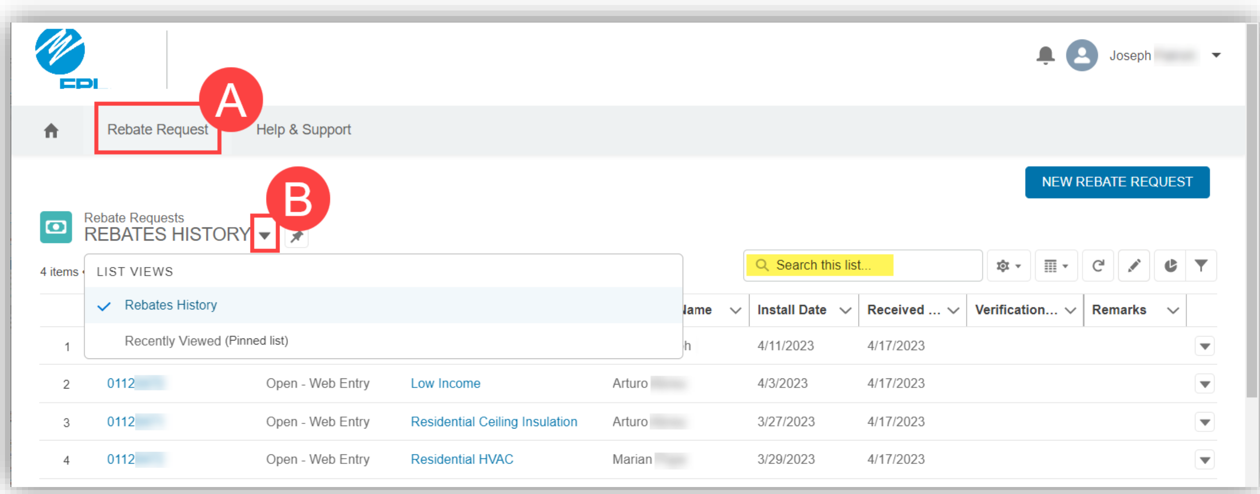
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>

To view the history of a previously submitted rebate request:

A. Select **Rebate Request** from the grey toolbar

B. Select the applicable **List View** by clicking on the drop-down arrow

Note: Refer to the table below for details on the various list views.



List View	Description
Recently Viewed	• Default List View • Includes recently viewed/submitted rebates **Note:** To change the default, select the pin next to the desired List View.
Rebates History	Display a full list of all submitted rebates

Important:

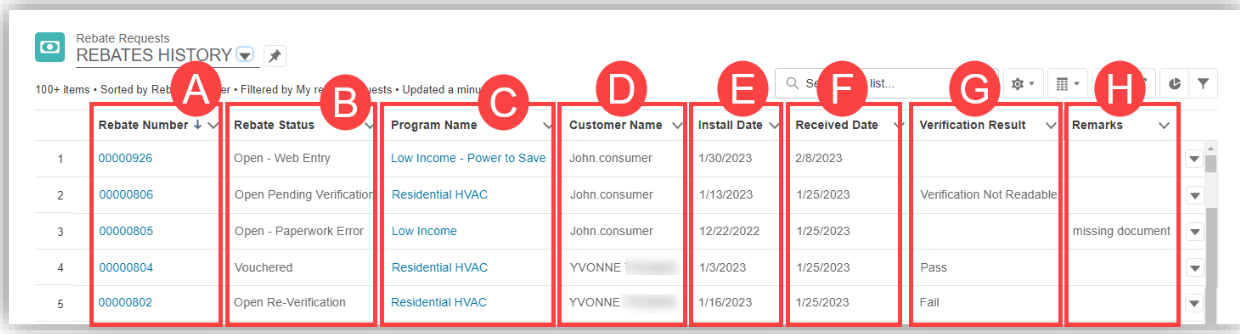
- List views vary depending on the programs supported by your company.
- Users can search for a specific rebate request by entering the rebate number in the "Search this list…" field.

</td></tr>
</table>

DSM Contractor Portal – User Guide for PICs

Step	Action
2	See the content below

- Once the applicable List View is selected, select the Rebate Number hyperlink to access the details
- Refer to the table below for the at-a-glance information found within a List View



Section	Description
A. Rebate Number	When selecting the Rebate Number hyperlink, details for the selected rebate will display **Note:** Refer to the Rebate Request Overview section for details.
B. Rebate Status	See the status table below

Status	Description
Open-Web Entry	Rebate pending review
Open-Pending Verification	Rebate has been selected for verification
Open-Paperwork Error	Rebate has documentation error(s)
Open-Re-Verification	Rebate has been selected for re-verification
Open Resubmission	Rebate has been updated and resubmitted for review
Vouchered	Rebate has been processed

C. Program Name	Displays program rebate was submitted for
D. Customer Name	Displays customer name
E. Install Date	Displays date of installation
F. Received Date	Displays date request was received
G. Verification Result	Displays verification results
H. Remarks	Displays remarks

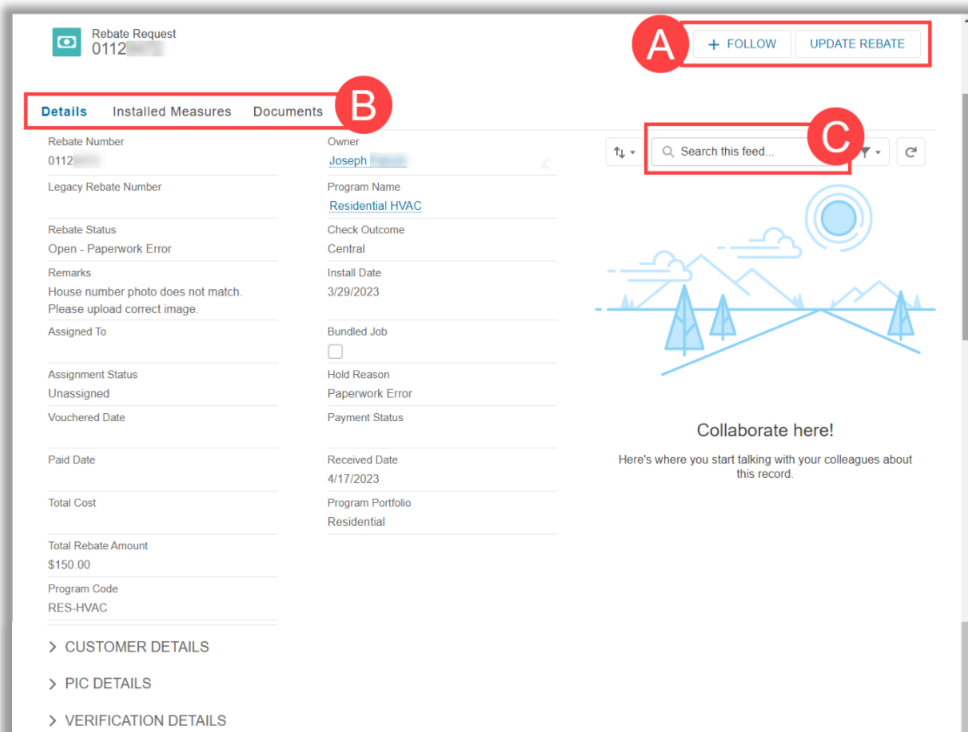
Note: Clicking on Program Name hyperlink will display details of the program.

Rebate Request Overview

When selecting the applicable Rebate Number hyperlink from the Rebate Request History section, you'll see all details that were originally entered when the rebate submittal was initially entered.

Directions: Refer to the table below for details on the various tabs and the information found within the Rebate Request Overview section.

Parts & Functions



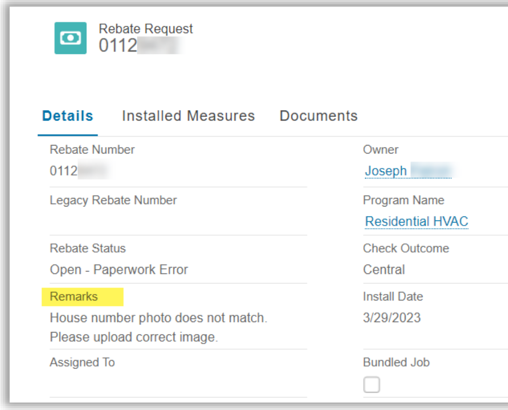
Section	Description
A. Buttons	• Follow – Allows users to see status updates on the Chatter feed • Update Rebate – Allows users to correct any paperwork error identified **Important:** Refer to the Correcting Paperwork Error for details on how to update the rebate.
B. Tabs	Allows users to toggle between the follow tabs: • Details – Displays status and remarks along with Customer, PIC, Verification and WATT Saver Details • Installed Measures – Displays details entered during submittal • Documents – Display all files/documents uploaded
C. Chatter	Allows users to initiate a message by tagging their Program Specialist on the identified request **Note:** Users must use the @ symbol to tag someone (e.g., @Name).

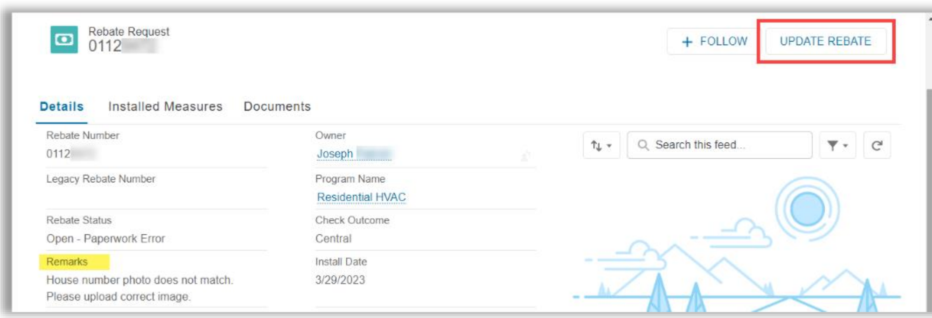
Correcting Paperwork Error Overview

PICs are required to correct any rebate request identified as having paperwork error or failed verification.

The *Remarks* section of the Rebate Request Overview will further explain the required action/error.

Refer to the steps below for an overview on how to correct paperwork error(s).



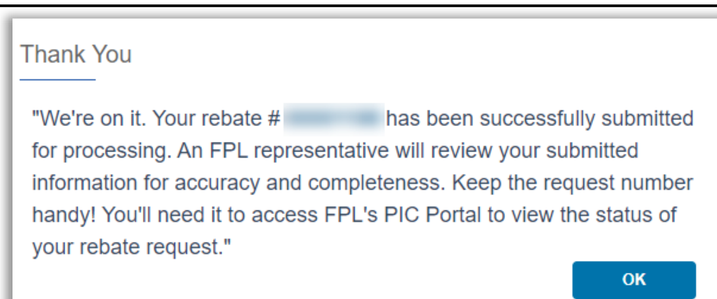
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>
Select the “Update Rebate” button from the Rebate Request Overview page
Note: Action will redirect you to the Rebate Request flow.


</td></tr>
<tr><td>2</td><td>
Within the Rebate Request flow, navigate through the applicable section/step to make the necessary updates.

Important:

The Terms and Conditions checkbox must be reselected.
PIC must go through the entire flow and resubmit the rebate with the updated details/documents.

</td></tr>
<tr><td>3</td><td>
Ensure the Thank You message displays, which confirms the rebate request has been resubmitted

Note: The rebate # will remain the same.


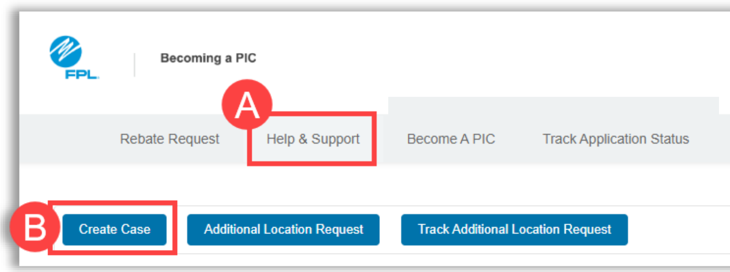
</td></tr>
</table>

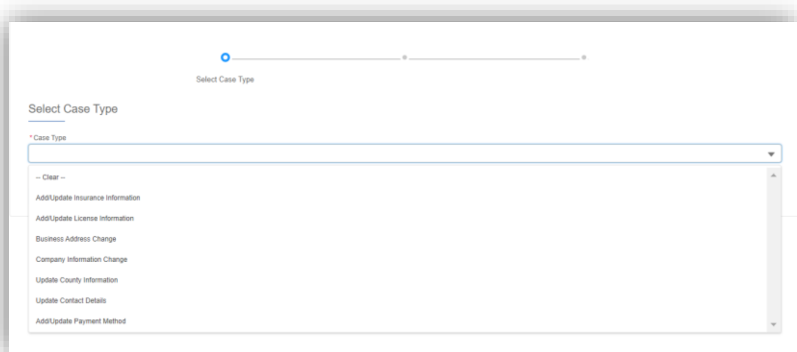
Help & Support – Create Case

The Help & Support section of the **FPL DSM Contractor Portal**, allows users to create Cases which are used to request changes to the PICs User Profile. There are various Case Types to select from and required fields/information are dynamic based on the type selected.

Note: For changes to the company name or ownership contact your Program Specialist.

Directions: Use the steps below to initiate a new Case request via the FPL DSM Contractor Portal.

<table>
<tr><th colspan="2">Initiating a Case</th></tr>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>To initiate a case from the FPL PIC Portal
A. Select Help & Support from the grey toolbar
B. Select the Create Case button


</td></tr>
<tr><td>2</td><td>Within the Select Case Type section, select the applicable Case Type from the drop-down menu


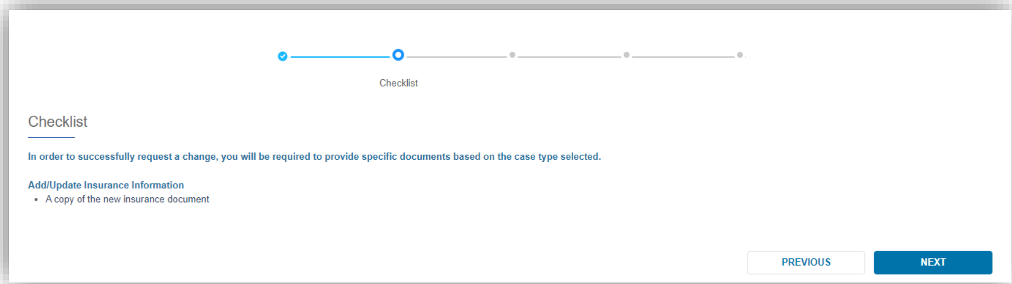
</td></tr>
<tr><td>3</td><td>Important: This user guide will provide the steps and actions to take when completing the following cases:
<table>
<tr><th>Case Type</th></tr>
<tr><td>Add/update Insurance Information</td></tr>
<tr><td>Company Information Change</td></tr>
</table>
</td></tr>
</table>

Case Type – Add/Update Insurance Information

Directions: Use the steps below to submit an Add/update Insurance Information Case request.

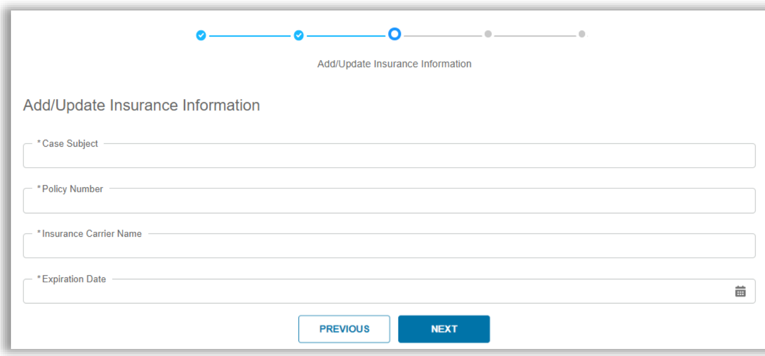
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>

- Review the Checklist details after initiating the Case
- Click **Next**



</td></tr>
<tr><td>2</td><td>

- Complete required fields identified with a red asterisk
- For the Case Subject, enter: Add/update License Information
- Click **Next**

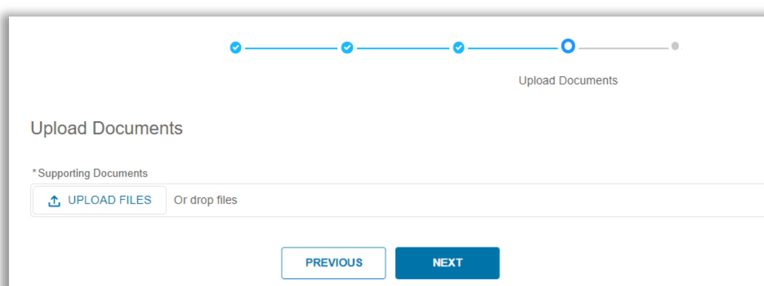


</td></tr>
<tr><td>3</td><td>

- Upload any supporting documents within the Update Documents section
- Click **Next** to continue

Results: A confirmation message will display with the Case number.

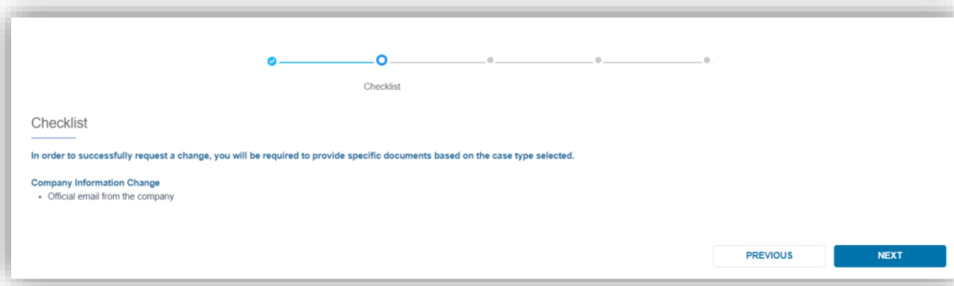
Important: Refer to the Case History section to see the status of your request.



</td></tr>
</table>

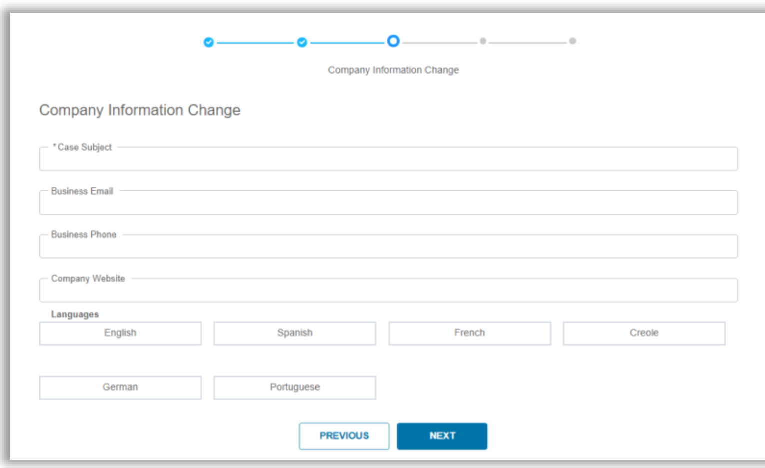
<table>
<tr><th colspan="2">Case Type – Company Information Change</th></tr>
<tr><td colspan="2">Directions: Use the steps below to submit a Company Information Change Case request.</td></tr>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>

- Review the Checklist details after initiating the Case
- Click **Next**



</td></tr>
<tr><td>2</td><td>

- For the Case Subject, enter: Company Information Change
- Complete applicable fields for which the information is changing
- Click **Next**

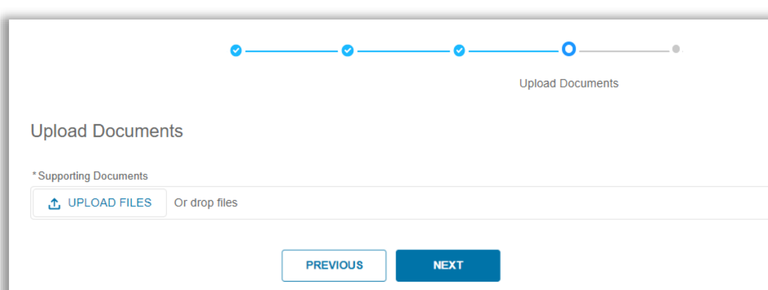


</td></tr>
<tr><td>3</td><td>

- Upload any supporting documents within the Update Documents section
- Click **Next** to continue

Results: A confirmation message will display with the Case number.

Important: Refer to the Case History section to see the status of your request.



</td></tr>
</table>

Help & Support – Case History

After submitting a Case, the history will display within the **Case History** section. Within this section, you'll have the option to modify the List View by selecting on the drop-down arrow.

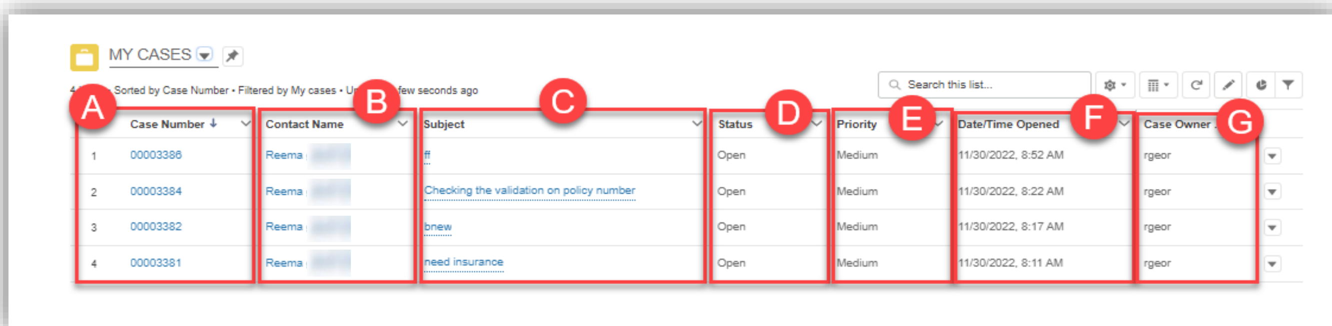
Note: List View will default to: Recently Viewed, however the PIC should *pin* their ideal List View to see the details of a submitted case.

Directions: Use the steps below to access and navigate through the Case History section.

Parts & Functions

Once the applicable List View is selected:
- Select the Case Number hyperlink to access the details
- Refer to the table below for the at-a-glance information found within a List View

Note: Columns/details within each List View will vary.



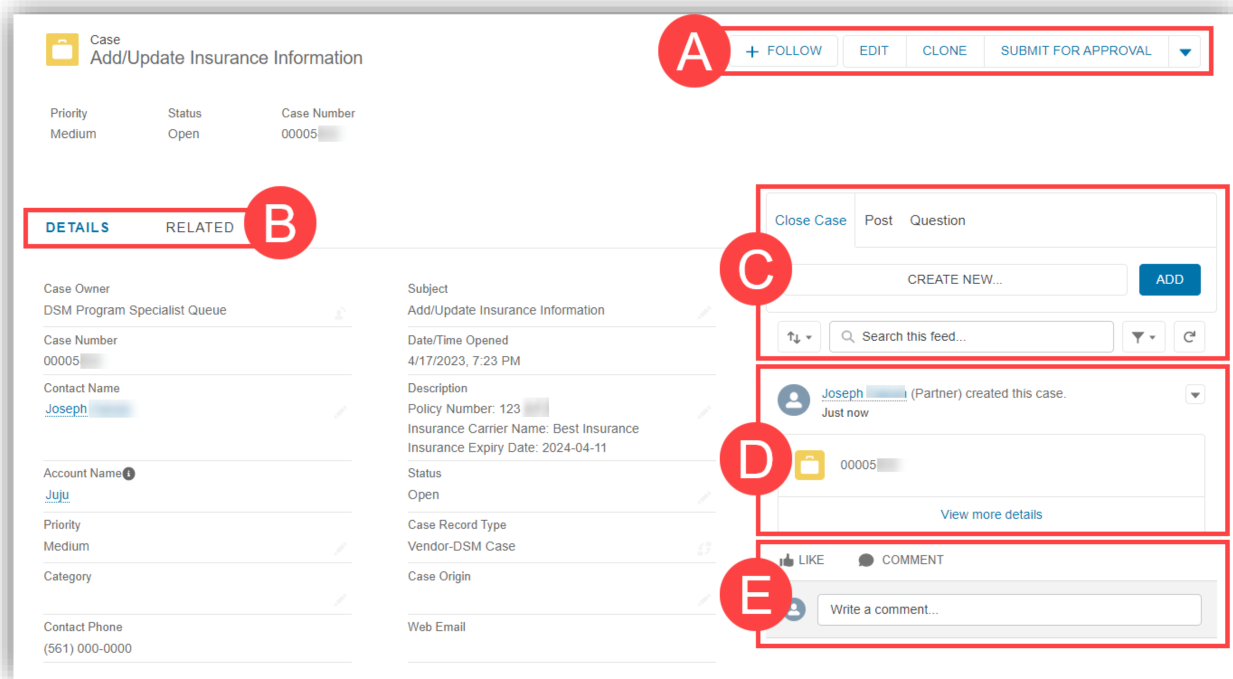
Section	Description
A. Case Number	When selecting the Case Number hyperlink, details for the selected case will display **Note:** Refer to the [Case Overview](#) section for additional details.
B. Contact Name	Displays the contact for the submitted case
C. Subject	Displays the subject of the submitted case
D. Status	Displays case status
E. Priority	Displays the case priority
F. Date/Time Opened	Displays the date and time case was opened
G. Case Owner Alias	Displays which group will be reviewing the case

Case Overview

After selecting the applicable Case Number hyperlink, you'll see the details that were originally entered when the case was created.

Directions: Refer to the table below for details on the various tabs and information found within the Case Overview.

Parts & Functions



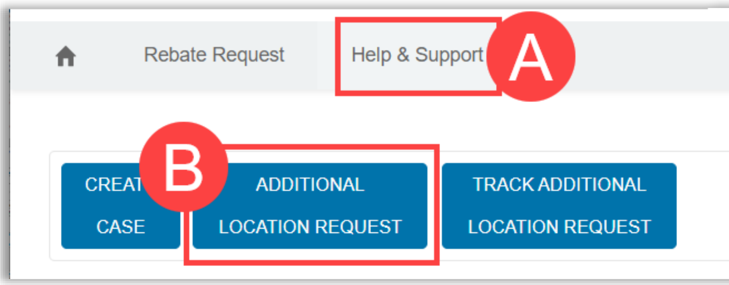
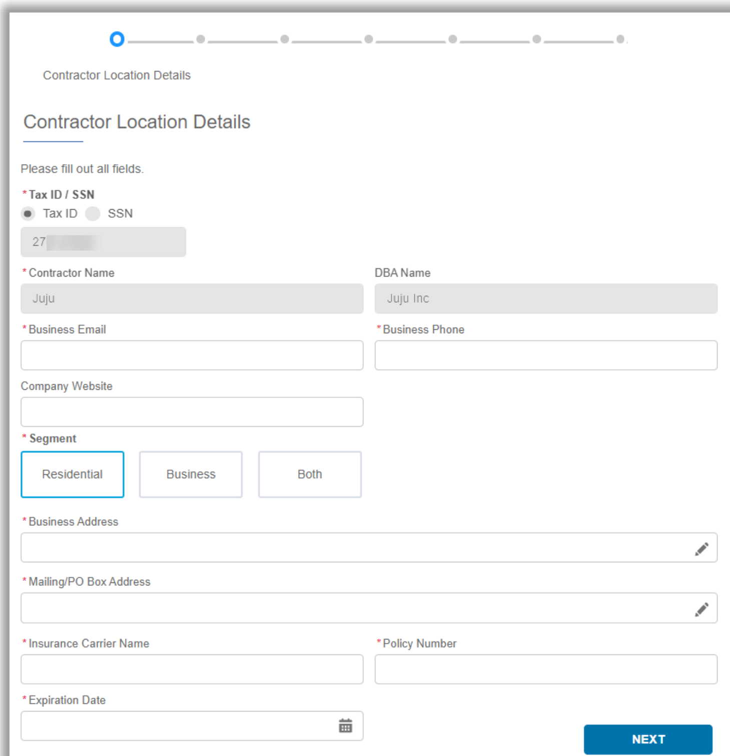
Section	Description
A. Buttons	• Follow – Allows users to see status updates on the Chatter feed • Edit – Allows users to modify certain fields • Clone – Not applicable • Submit for Approval – Not applicable
B. Tabs	Allows users to toggle between the follow tabs: • Details – Displays details pertinent to the selected case • Related – Displays any documents/files that were uploaded
C. Chatter Tabs	Allows users to initiate a message by tagging their Program Specialist on the identified case **Note:** Users must use the @ symbol to tag someone (e.g., @Name).
D. Case Overview History	Displays history of interactions related to the selected case
E. Comment	Feature not available for use

Help & Support – Additional Location Request

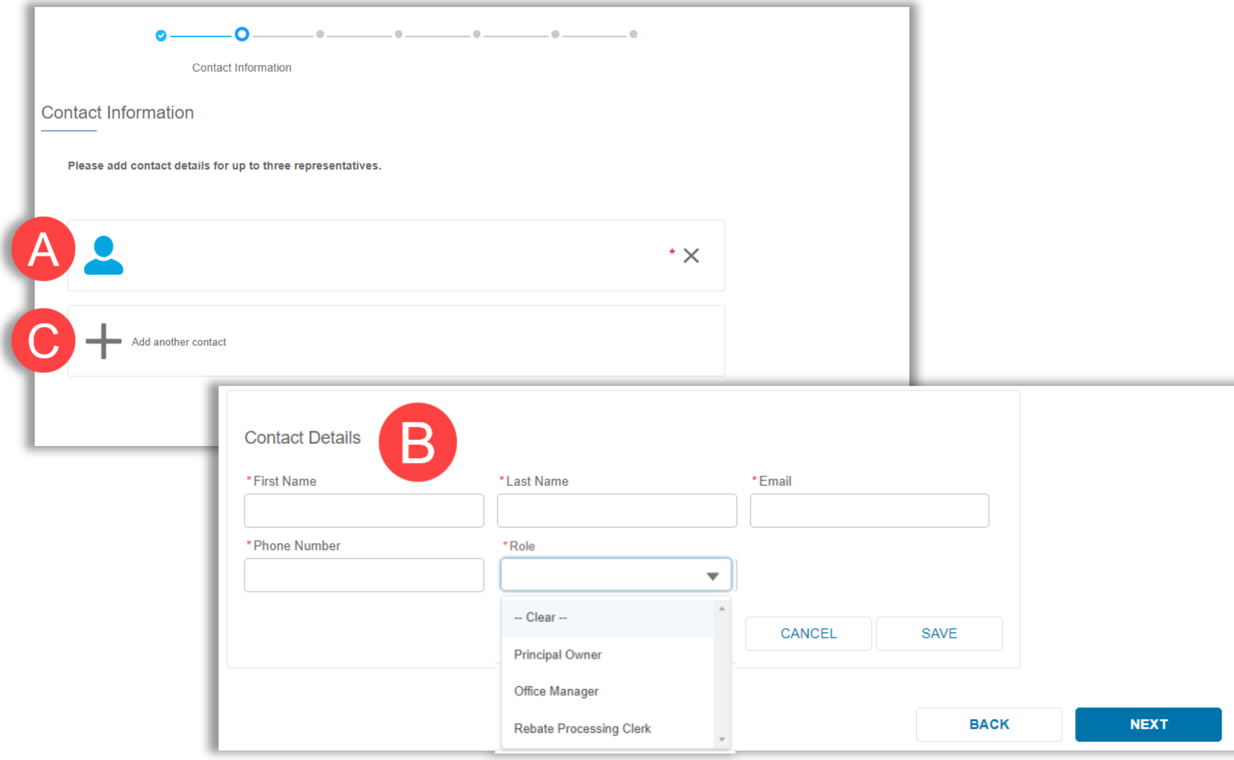
The Help & Support section of the **FPL DSM Contractor Portal**, will also allow users to add additional locations to their existing profile if the Tax ID is the same for all locations.

Note: If the location you are adding has a different Tax ID than the current profile, a new profile must be created. Refer to the User Guide to Become a PIC for these steps.

Directions: Use the steps below for requests to add additional locations.

Step	Action
1	To initiate an additional location request via the **FPL PIC Portal** A. Select **Help & Support** from the grey toolbar B. Select the **Additional Location Request** button 
2	Complete the **Contractor Location Details** then select **Next** **Required Fields** • Business Email • Business Phone • Company Website – if applicable • Segment • Business Address • Mailing PO Box Address – if same as business address, re-enter the information • Insurance Carrier Name • Policy Number • Expiration Date **Note** • Required fields are marked with a red asterisk. • When searching for an address, do not use “#” for apartments or suites. 

Step	Action
3	• Complete the **Contact Information** section • Refer to the table below for details on what to complete • Select **Next** once details are entered and saved



Section	Items to enter
A. Silhouette icon	Click the icon to open the contact details fields

B. Contact Details	• Contact details (all field are required)
	    • For the Role field, select from:
	    • Principal Owner
	    • Office Manager
	    • Rebate Processing Clerk
	• Save details
	
	Note: Continue to use your existing log-in credentials for access to the FPL PIC Portal.

C. Add another contact	If applicable, click the plus sign to open the *Contact Details fields* to add additional contacts

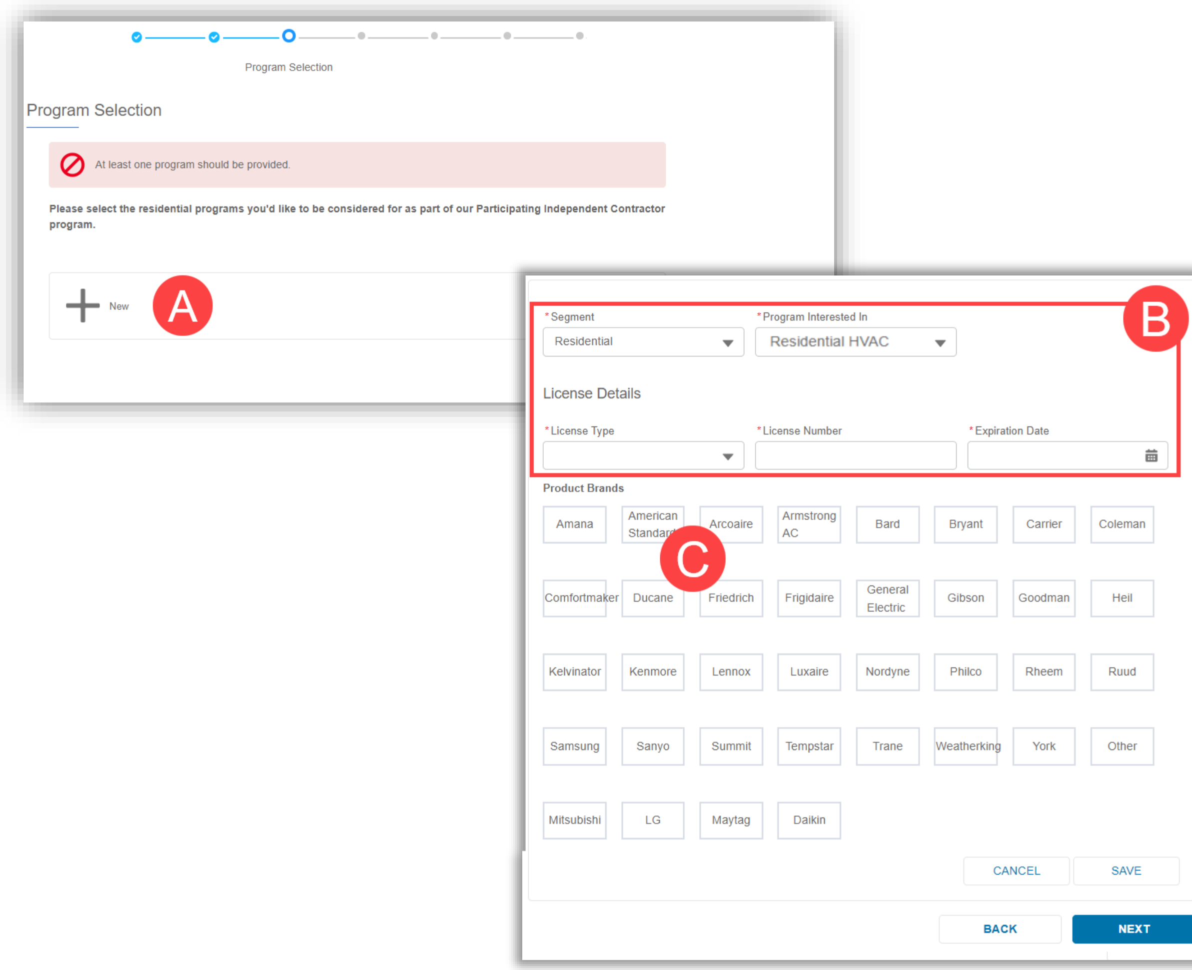
Important: Contact details can be added for up to three representatives.

Step | **Action**

4

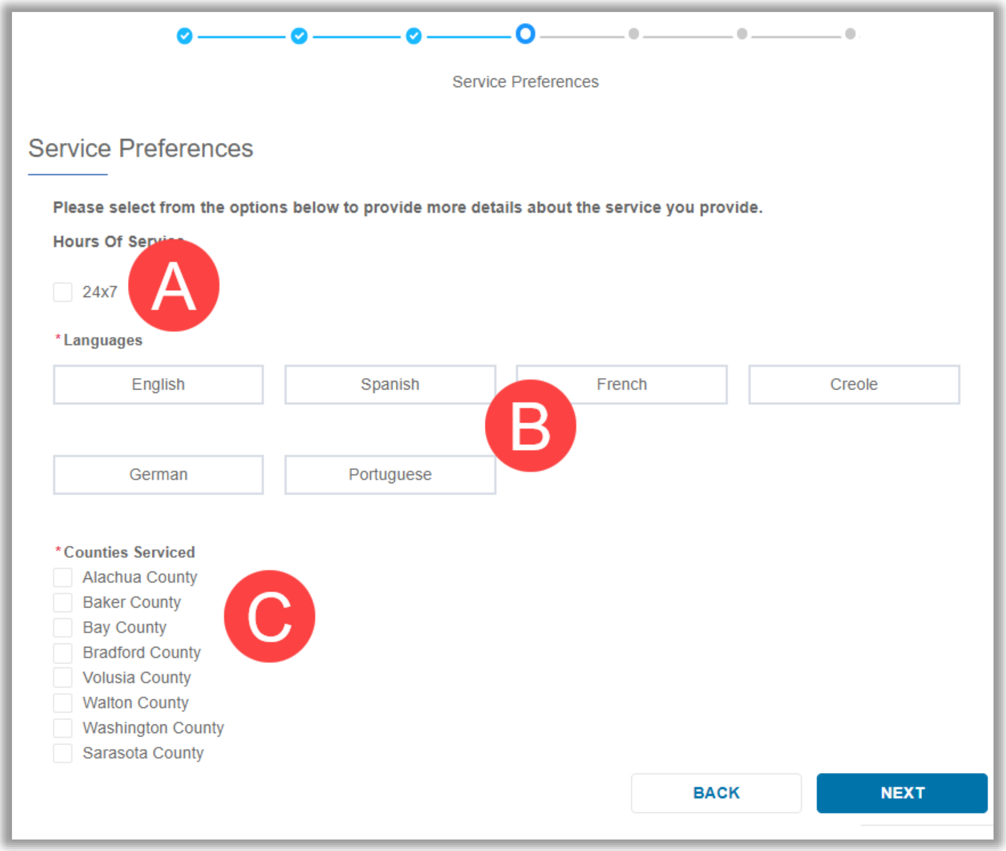
- Complete the **Program Selection** section
- Refer to the table below for details on what to complete
- Select **Next** once details are entered and saved

Important: If supporting multiple programs, details must be added one at a time.



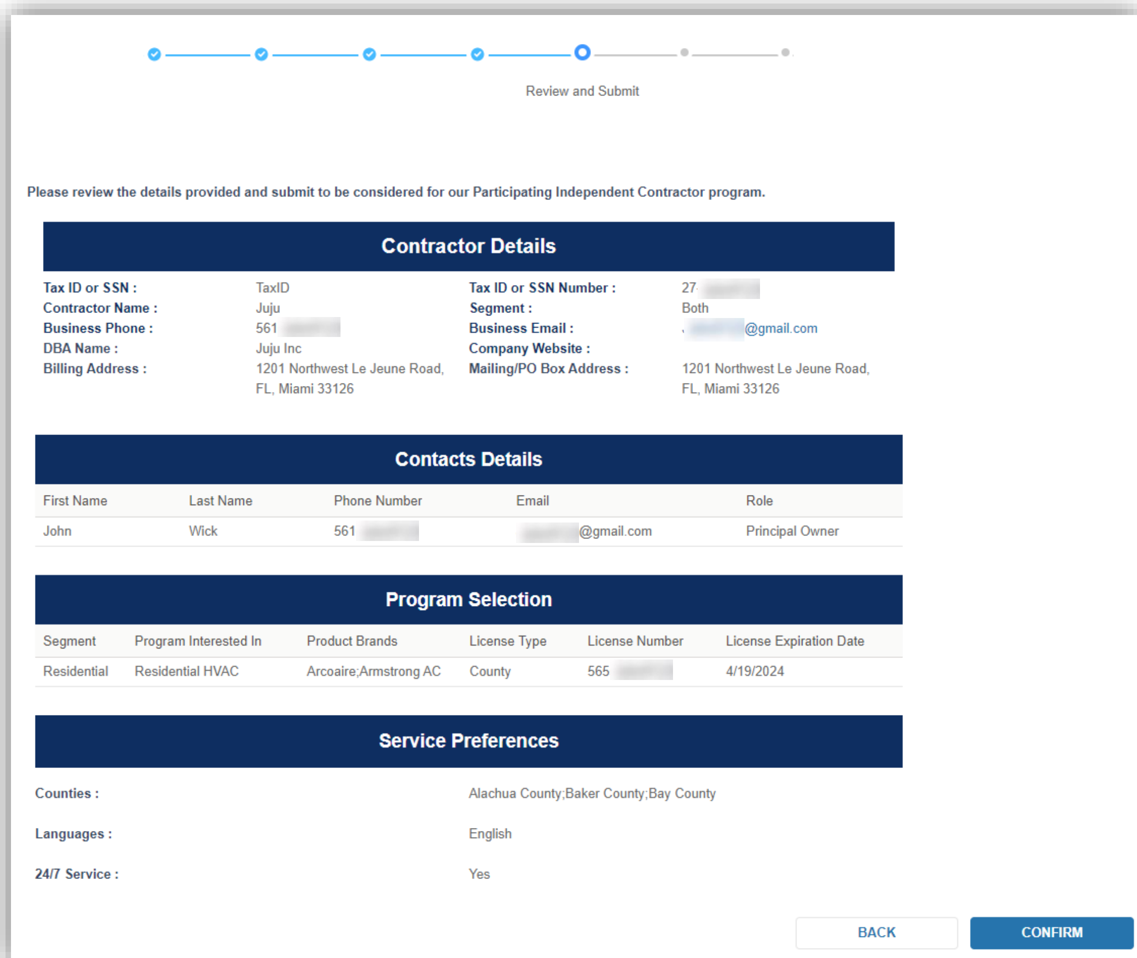
Section	Items to enter
A. New icon	Click the plus sign to open the *Program Selection fields*
B. Program Selection	• Details for the program being supported (all fields are required) • Save details **Note:** Selecting the Residential HVAC program will enable the *Products Brands* section.
C. Product Brands	• Only applicable for the Residential HVAC Program • Select all brands your company supports/offers

Step	Action
5	• Complete the **Service Preferences** section • Refer to the table below for details on what to complete • Select **Next** once details are selected



Section	Items to select
A. Hours of Service	Select checkbox if your company will be available 24x7
B. Languages	Select all languages supported by your company
C. Counties Served	Select counties serviced by your company

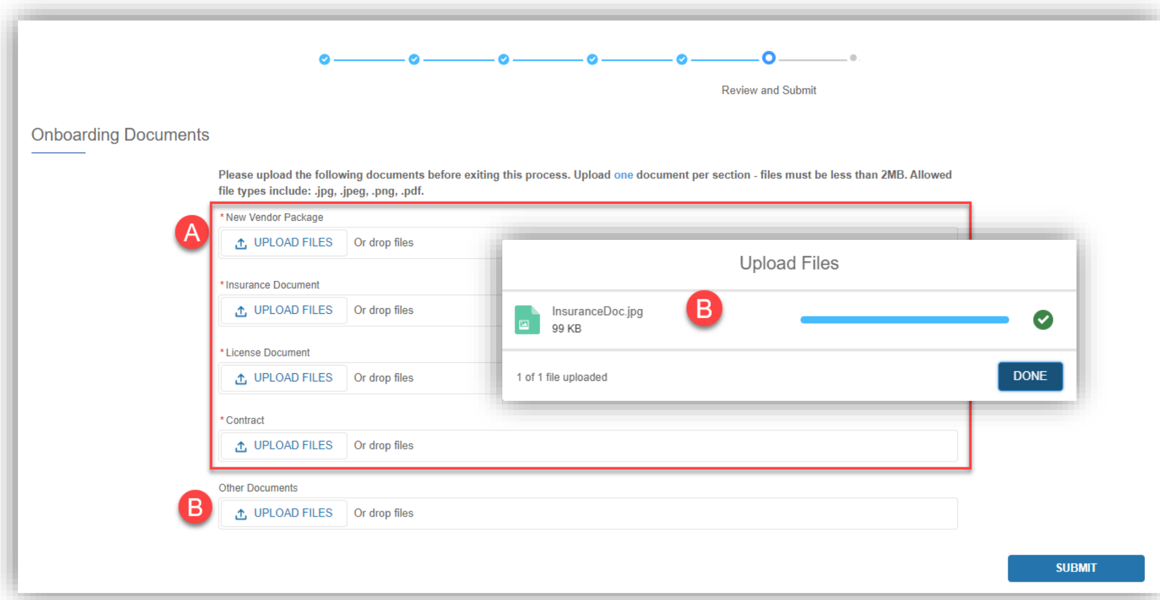
Step	Action
6	• Review the Summary section • Select **Confirm** once details are carefully reviewed **Note:** If needed, select the Back button and navigate to the section(s) that require modification.



DSM Contractor Portal – User Guide for PICs

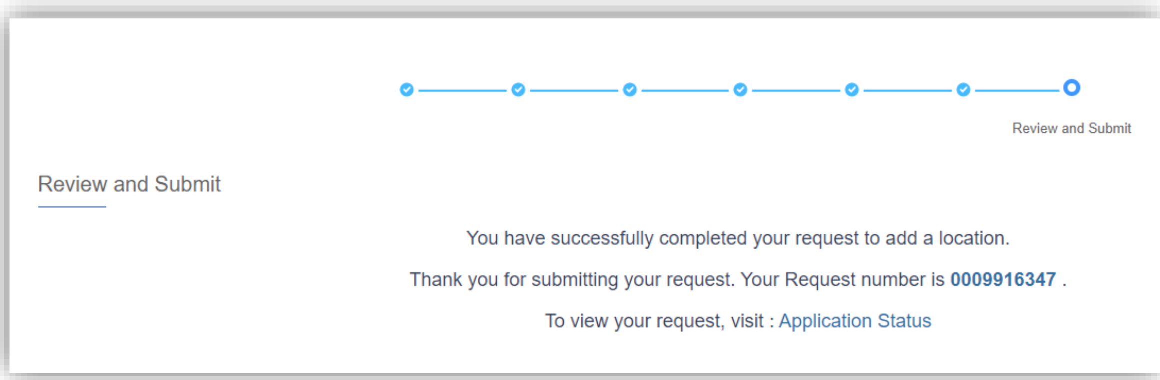
Step	Action
7	

- Complete the **Onboarding Documents** section
- Refer to the table below for details on what to complete
- Select **Submit** once the required documents are uploaded



Section	Items to upload
A. Required Documents	Select the *Upload Files* button to upload all required documents **Reminder:** The Certificate Holder Address must be included in the Insurance Document.
B. Upload Files	• Displays as file is being uploaded • Will confirm whether the file was successfully updated or not
C. Other Documents	Additional documents can be uploaded if needed

Important:
- Required documents are identified with a red asterisk.
- File format allowed for upload include JPG, JPEG, PNG and PDF. Additionally, files must be less than 6MB.
- If supporting multiple programs, group into one attachment by section.

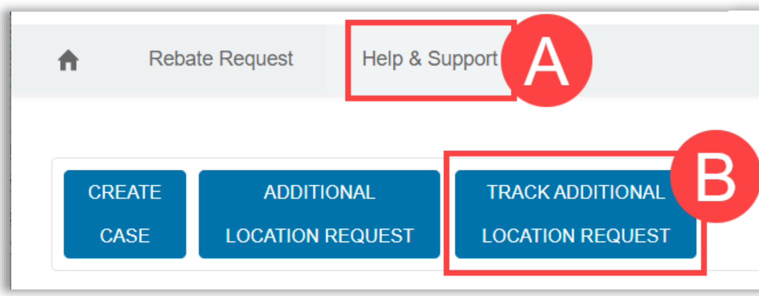
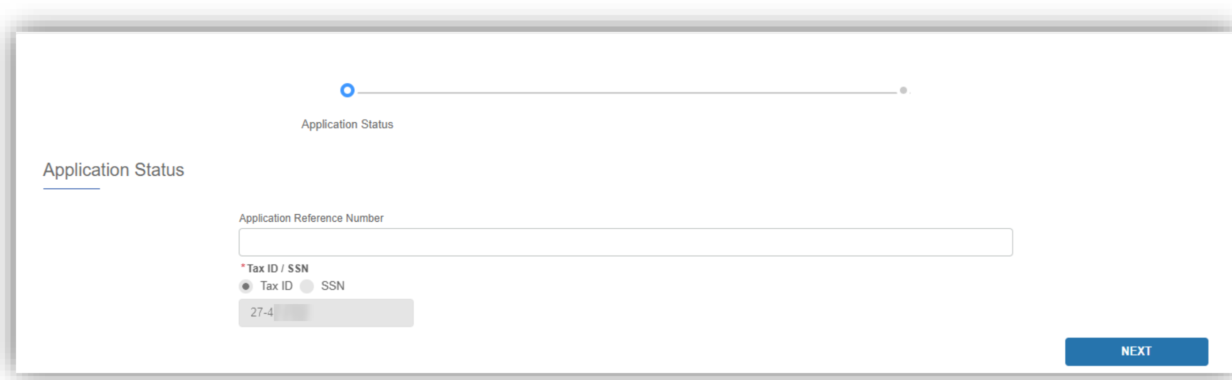
Step	Action
8	Review the confirmation message and record/save the application request number **Important:** The request number will be required to check the status of the application. 

Help & Support – Track Additional Location Request

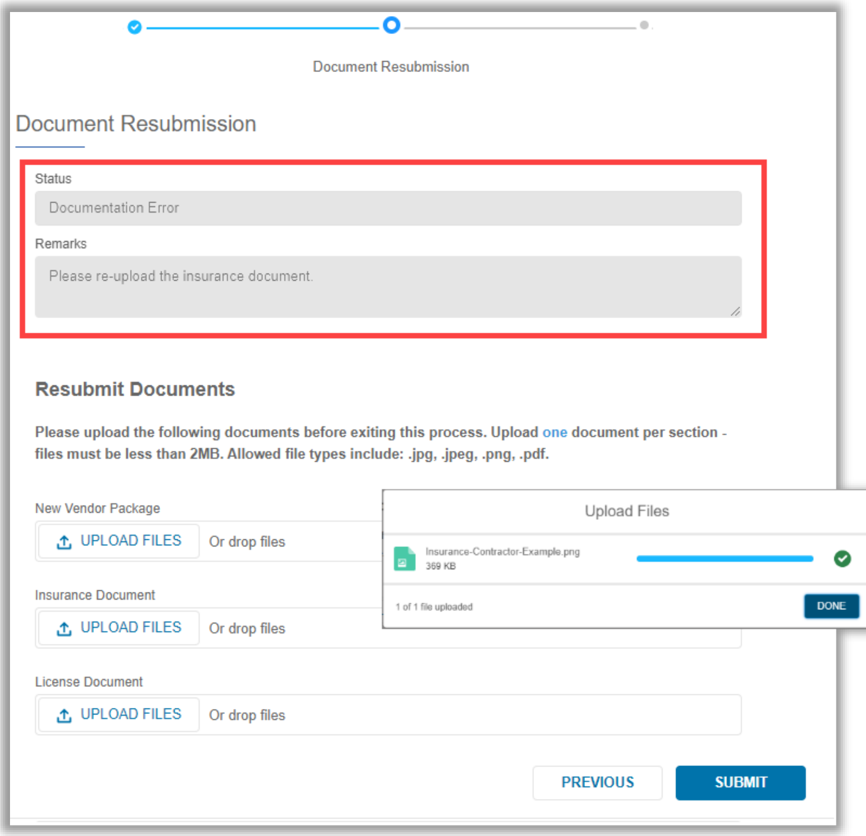
The Help & Support section of the **FPL DSM Contractor Portal**, will allow users to check the status of a previously submitted additional location request.

Note: To check the status, PICs will need the reference number of the previously submitted request.

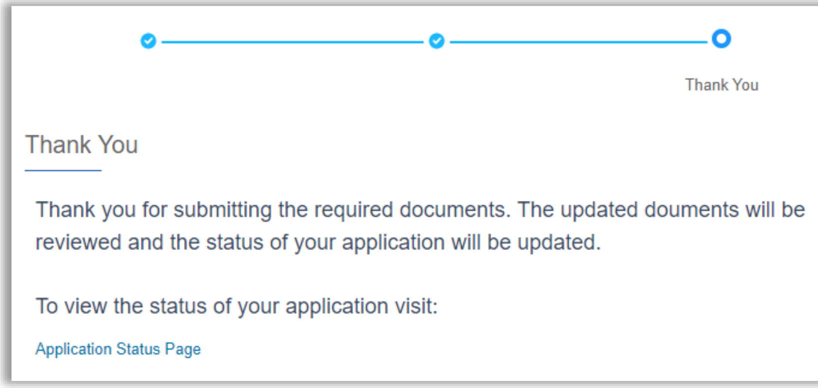
Directions: Use the steps below to check the status of a previously submitted additional locations request.

Step	Action
1	To initiate an additional location request via the **FPL PIC Portal** A. Select **Help & Support** from the grey toolbar B. Select the Track Additional Location Request button 
2	• Enter the application reference number • Select **Next** once details are entered 

Step	Action
3	• Review the **Status** and any applicable **Remarks** • Use the table below to determine next steps based on the Status displayed **Important:** • The Resubmit Documents section will display if the request is in the “Documentation Error” status. • File format allowed for upload include JPG, JPEG, PNG and PDF. Additionally, files must be less than 6MB.



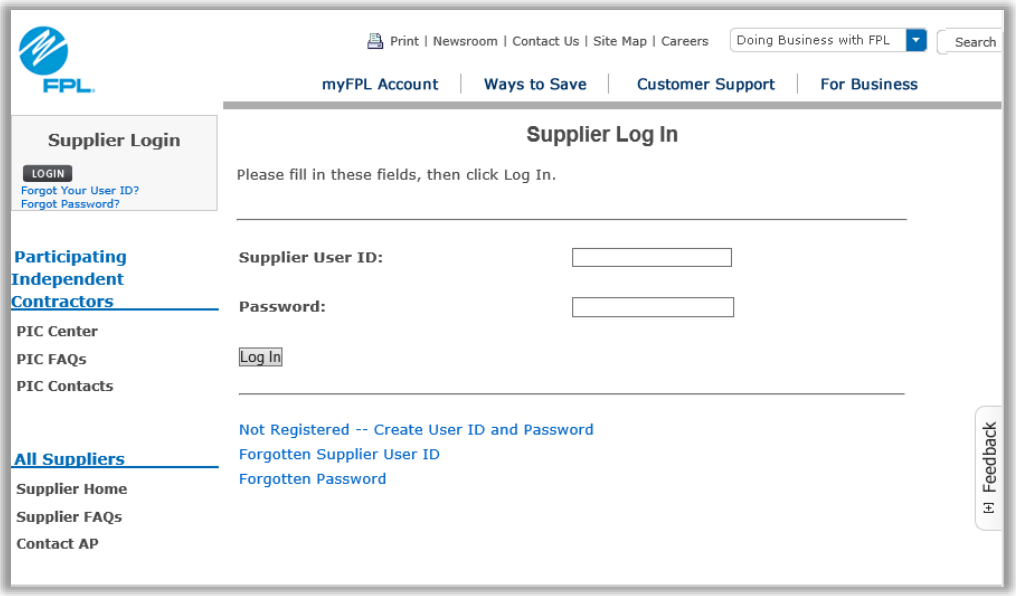
Status	Next steps
Pending	No action needed – request is pending review
In Progress	No action needed – request is under review
Documentation Error	• One or multiple documents had errors • Refer to the remarks sections to identify which document(s) had the error • Complete the **Resubmit Documents** section by reuploading the document(s) identified • Select **Submit**
Rejected	• No action needed – application has been rejected • Refer to the remark’s sections for details

Step	Action
4	If reuploading the document(s), a Thank you page will display 

Payment Research via the Supplier Portal

PICs who provide products or services to NextEra/FPL, should create a Supplier Portal User ID to view and access their procurement and financial information.

Within the Supplier Portal, PICs will be able to check on the status of payments.



Important: PICs are required to self-register in order to gain access to the Supplier Portal.