



# 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.**

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 links for Dashboard, Jobs, Customer Reviews, and Resources. The user's name, Carmen B., is displayed in the top right corner. The main heading is 'Programs', followed by a subtext: '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).' Below this, a yellow box contains a message: '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 'GoGreen Home' program is listed with a 'GoGreen' badge. A red box highlights the 'Apply to Program' button in the top right corner of the program card.

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.

The screenshot shows the GoGreen Home portal interface after application submission. The navigation bar and user information remain the same. The 'Programs' section now shows a green status bar with a checkmark and the text 'Submitted'. Below this, the 'GoGreen Home' program is listed with a 'GoGreen' badge. A 'View Application' button is now visible in the top right corner of the program card. The subtext below the program name reads: 'GoGreen Home connects Californians with energy upgrade contractors and affordable, accessible financing.' Below this, there is a link to '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**.



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Jobs - Recently Updated

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

My Profile  
Contractor Profile  
Programs  
Badges and Assets  
Reports  
User Accounts  
Log Out

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

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## User Accounts

New User

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.

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## New User

Back

First name \*

Last name \*

Job title

Role \*

Staff  
Administrator  
Staff

Phone

Email \*