

Submitting a Customer Inquiry

This Job Aid will guide the customer through submitting an electronic inquiry to Con Edison via Salesforce.

Objective of Submitting a Customer Inquiry:

Submitting a Customer Inquiry allows customers to direct any questions and responses related to their EV case to Energy Services or Engineering teams. This inquiry will be associated with the active PowerReady (EVLID) and CPMS (MC number).

Examples of when to submit an inquiry are:

- When you need an update on the project's utility side construction status.
- If you have questions about rejected documents.
- To request a field visit.

Note: Below are the definitions for each Inquiry Type and many may not be applicable to EV cases:

- **Case Status-** Seeking an update on the progress of the case or any general questions.
- **Document and Deposit Status-** Inquiries about document uploads, rejections, or pending deposit requests.
- **Service Date** - (Not Applicable to EV cases)
- **Electric/Gas technical questions** - (Not Applicable to EV cases)
- **Complaint-** Raising a concern with Energy Services or Engineering.
- **ConEdison/DOB Joint Inspection** (Not Applicable to EV cases)
- **Third Party Attachment-** (Not Applicable to EV cases)

Steps on How to Submit an Inquiry:

1. Log into your account on [Salesforce](#).

Log In

Email Address

REGISTER
RESET MY PASSWORD
STEAM CUSTOMER?

Password [SHOW](#)

Remember me

Log In

2. After logging in, locate the project you would like to inquire about using the search option or by looking under the Project Name section.

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Home Projects Inquiries Guidelines

Apply for Micromobility

Apply for EV PowerReady

EV PowerReady Batch Upload

Micromobility Batch Upload

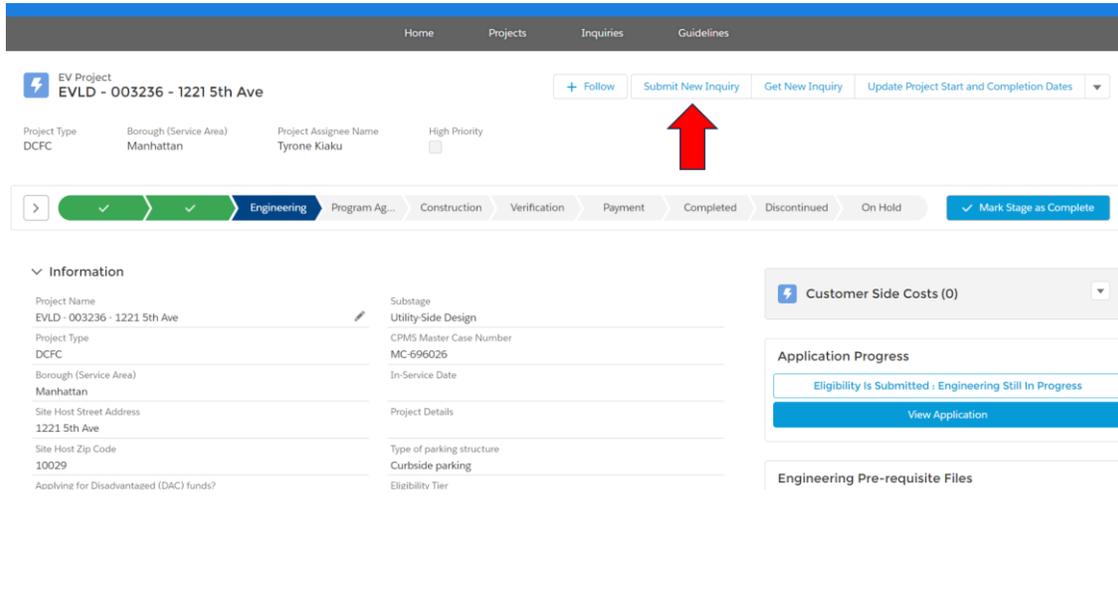
Step-by-step EV PowerReady Application Process Overview

- 1 - **Eligibility:** Eligibility and incentive tiers determination.
- 2 - **Engineering:** Service Determination Ruling. This stage typically takes approximately 30 days.
- 3 - **Program Agreement:** Any amount owed to Con Edison for EDF or Accommodation and incentive offer determination. Program Agreement Execution.
- 4 - **Construction:** Customer and utility-side constructions. Utility inspection.
- 5 - **Verification:** Final documentation and site verification (through an on-

Project Name
1 EVLD - 003236 - 1221 5th Ave
2 MICR - 003334 - Street 17 July
3 MICR - 003333 - Test Inquiry 15 July
4 MICR - 003314 - Street 5 July
5 MICR - 003329 - Street DAC-No 10 July
6 MICR - 003328 - Street DAC-Yes 10 July
7 MICR - 003162 - 133 Peter Road
8 MICR - 003311 - Street C
9 MICR - 003308 - Street 2-US
10 MICR - 003310 - Street New york

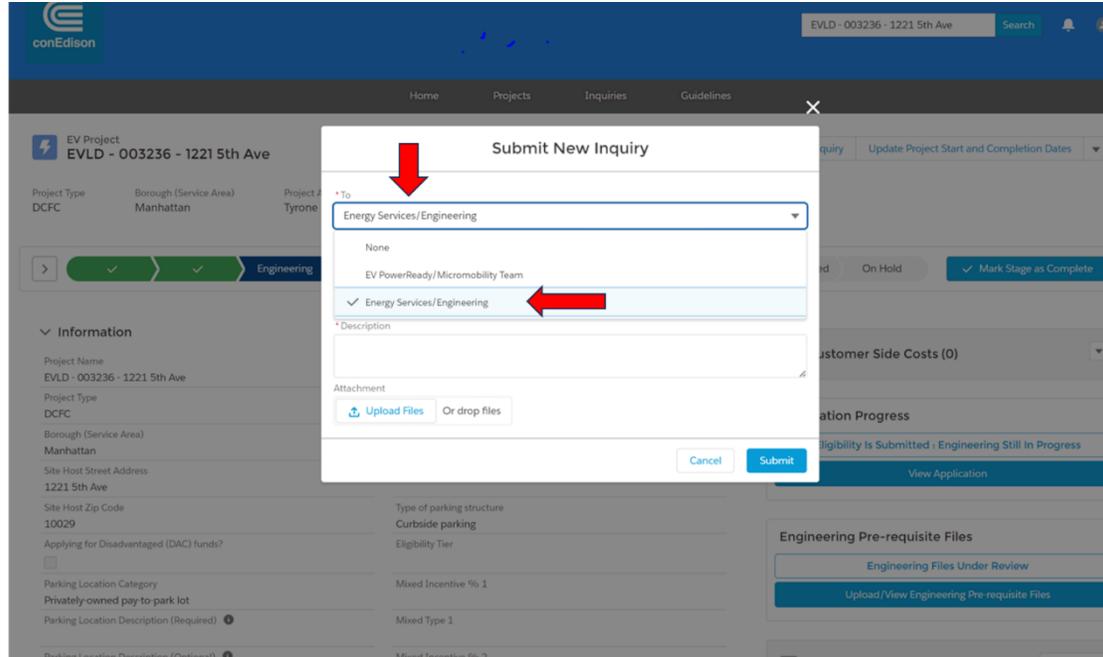
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3. Select “Submit New Inquiry”.



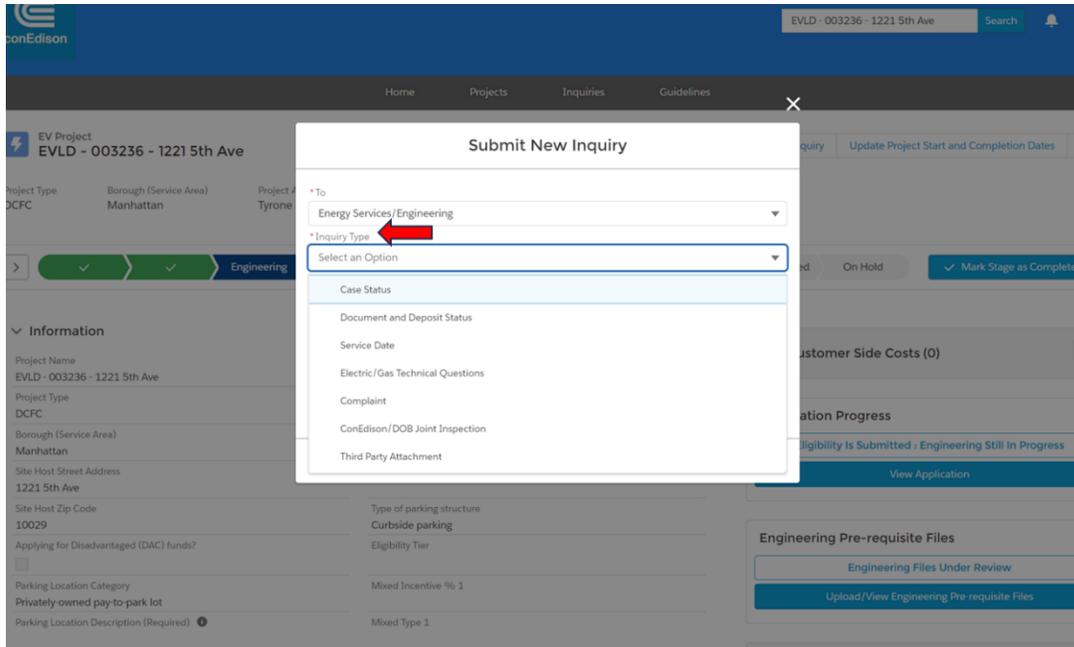
The screenshot shows the EV Project dashboard for project EVLD - 003236 - 1221 5th Ave. The 'Submit New Inquiry' button is highlighted with a red arrow. The dashboard includes a navigation bar with 'Home', 'Projects', 'Inquiries', and 'Guidelines'. Below the navigation bar, there are buttons for '+ Follow', 'Submit New Inquiry', 'Get New Inquiry', and 'Update Project Start and Completion Dates'. A progress bar shows the current stage as 'Engineering'. The 'Information' section displays project details such as Project Name, Project Type, Borough (Service Area), Site Host Street Address, Site Host Zip Code, and Project Assignee Name. The 'Application Progress' section shows 'Eligibility Is Submitted : Engineering Still In Progress' and a 'View Application' button. The 'Engineering Pre-requisite Files' section is also visible.

4. Choose the recipient of your inquiry, in this case, select “Energy Services/Engineering.”



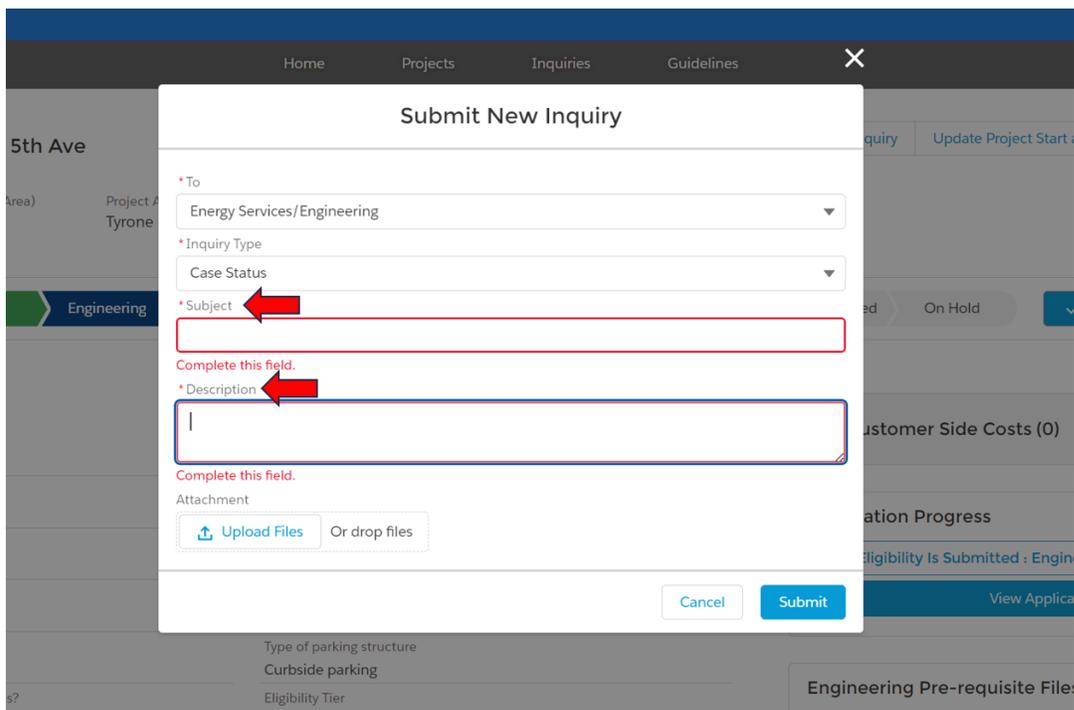
The screenshot shows the 'Submit New Inquiry' dialog box. The 'To' field is set to 'Energy Services/Engineering'. The 'Description' field is empty. The 'Attachment' section has 'Upload Files' and 'Or drop files' options. The 'Submit' button is highlighted. The background shows the same project dashboard as in the previous screenshot.

5. Choose the “Inquiry Type” that corresponds to the nature of your inquiry.



The screenshot shows the 'Submit New Inquiry' form in a web application. The form is titled 'Submit New Inquiry' and has a close button (X) in the top right corner. The background shows a project page for 'EVLD - 003236 - 1221 5th Ave'. The form fields are: '* To' (dropdown menu with 'Energy Services/Engineering' selected), '* Inquiry Type' (dropdown menu with 'Select an Option' selected), and 'Case Status' (dropdown menu). A red arrow points to the 'Inquiry Type' dropdown menu. Below the dropdown menu, there is a list of options: Case Status, Document and Deposit Status, Service Date, Electric/Gas Technical Questions, Complaint, ConEdison/DOB Joint Inspection, and Third Party Attachment.

6. After choosing the Inquiry Type, proceed to fill in the Subject and Description fields for your inquiry.



The screenshot shows the 'Submit New Inquiry' form in a web application. The form is titled 'Submit New Inquiry' and has a close button (X) in the top right corner. The background shows a project page for 'EVLD - 003236 - 1221 5th Ave'. The form fields are: '* To' (dropdown menu with 'Energy Services/Engineering' selected), '* Inquiry Type' (dropdown menu with 'Case Status' selected), '* Subject' (text input field), '* Description' (text input field), and 'Attachment' (button with 'Upload Files' and 'Or drop files'). Red arrows point to the 'Subject' and 'Description' text input fields. Below the 'Subject' field, there is a red error message: 'Complete this field.' Below the 'Description' field, there is a red error message: 'Complete this field.' At the bottom of the form, there are 'Cancel' and 'Submit' buttons.

Note: You also have the option of uploading any files to your inquiry.

7. Once all the information is filled out, click on “Submit” to complete the process.

The screenshot shows a web application interface with a modal window titled "Submit New Inquiry". The modal contains the following fields and controls:

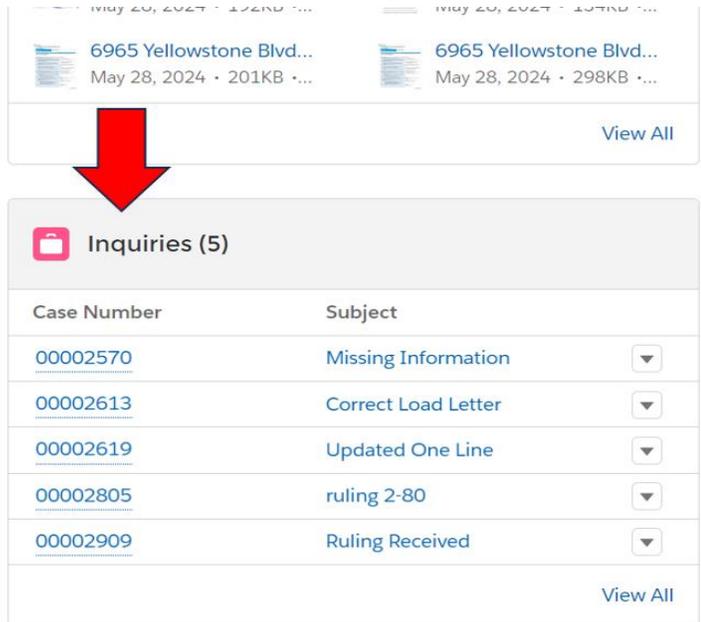
- Navigation: Home, Projects, Inquiries, Guidelines
- Form Fields:
 - *To: Dropdown menu with "Energy Services/Engineering" selected.
 - *Inquiry Type: Dropdown menu with "Case Status" selected.
 - *Subject: Text input field.
 - *Description: Text area.
 - Attachment: "Upload Files" button and "Or drop files" text.
- Buttons: "Cancel" and "Submit" buttons at the bottom right.

A large red arrow points to the "Submit" button, indicating the final step of the process.

How to Respond to an Inquiry

This section details on how to respond to an inquiry that you had submitted or one that Engineering and Energy Services submitted. This inquiry will be associated with the active PowerReady (EVLID) and CPMS (MC number).

1. You can view them under the “Inquiries” section, along with any previous submissions.

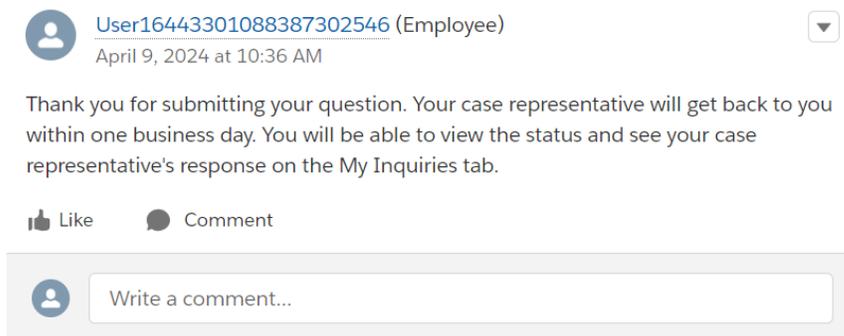


The screenshot shows a user interface with a list of inquiries. At the top, there are two document thumbnails for '6965 Yellowstone Blvd...' with dates 'May 28, 2024' and sizes '201KB' and '298KB'. Below them is a 'View All' link. A large red arrow points down to a section titled 'Inquiries (5)'. This section contains a table with the following data:

Case Number	Subject	
00002570	Missing Information	▼
00002613	Correct Load Letter	▼
00002619	Updated One Line	▼
00002805	ruling 2-80	▼
00002909	Ruling Received	▼

At the bottom right of the table is another 'View All' link.

Note: You will automatically receive the message below once you submit an inquiry to Energy Services or Engineering:



The screenshot shows a notification message from an employee. It includes a user profile icon, the name 'User16443301088387302546 (Employee)', and the timestamp 'April 9, 2024 at 10:36 AM'. The message text reads: 'Thank you for submitting your question. Your case representative will get back to you within one business day. You will be able to view the status and see your case representative's response on the My Inquiries tab.' Below the message are 'Like' and 'Comment' buttons. At the bottom, there is a comment input field with a placeholder 'Write a comment...' and a user profile icon.

You will be notified via email once a response is received. You will then have 7 business days to reply. If you respond after this period, the inquiry will be closed, and you will need to create a new one.

2. Following the email notification about the response, log back into Salesforce and select “Get New Inquiry”. The system will refresh to display any new inquiries received.

The screenshot shows the Salesforce interface for a project. At the top, a green success message states "Success Successfully retrieved inquiries." A red arrow points to this message. Below the message is a search bar with the text "EVL - 003236 - 1221 5th Ave" and a search icon. A navigation bar contains "Home", "Projects", "Inquiries", and "Guidelines". Below this, there are buttons for "+ Follow", "Submit New Inquiry", "Get New Inquiry", and "Update Project Start and Completion Dates". A red arrow points to the "Get New Inquiry" button. The main content area shows project details for "03236 - 1221 5th Ave", including "Borough (Service Area) Manhattan", "Project Assignee Name Tyrone Kiaku", and "High Priority". A progress bar shows stages: Engineering (checked), Program Ag..., Construction, Verification, Payment, Completed, Discontinued, and On Hold. A "Mark Stage as Complete" button is visible. Below the progress bar, there are sections for "Customer Side Costs (0)", "Application Progress" (Eligibility is Submitted - Engineering Still In Progress), and "Engineering Pre-requisite Files".

3. Next, select “View All” under the Inquiries section.

The screenshot shows the "Inquiries (5)" section in Salesforce. At the top, there are two document thumbnails for "6965 Yellowstone Blvd..." with dates "May 28, 2024" and sizes "201KB" and "298KB". A red arrow points down from these thumbnails to the "Inquiries (5)" section. The section has a header "Inquiries (5)" with a red arrow icon. Below the header is a table with columns "Case Number" and "Subject". The table contains five rows of inquiries. A red arrow points to the "View All" link at the bottom right of the table.

Case Number	Subject
00002570	Missing Information
00002613	Correct Load Letter
00002619	Updated One Line
00002805	ruling 2-80
00002909	Ruling Received

INTERNAL

4. Then, choose the most recent inquiry you submitted or was submitted to you.

Inquiries

5 Items · Updated a few seconds ago

	Case Number	Subject
1	00002570	Missing Information
2	00002613	Correct Load Letter
3	00002619	Updated One Line
4	00002805	ruling 2-80
5	00002909	Ruling Received

5. You will then be able to view your initial inquiry along with the response from Energy Services or Engineering.

Case Ruling Completed + Follow

Priority: Medium | Status: New | Case Number: 00002281

Case Owner: [Akanksha Jain](#) | **Contact Phone:** (435) 677-8123
Case Number: 00002281 | **Contact Email:** jaina@coned.com
Contact Name: [Akanksha Jain](#)
Account Name: [Jain](#)

Additional Information

Status: New	Type:
Case Origin:	Case Reason:
Priority: Medium	
Subject: Ruling Completed	
Description: What ate the next steps now that the ruling is completed?	
Internal Comments:	
Date/Time Opened: 7/26/2024, 11:18 AM	Date/Time Closed:
Web Email:	Web Company:
Web Name:	Web Phone:

Post

Share an update... Share

Search this feed...

User16443301088387302546 (Employee) 1h ago

What ate the next steps now that the ruling is completed?

Like Comment

Write a comment...

User16443301088387302546 (Employee) 1h ago

Hello,

Thank you for your inquiry: you will receive an email with the ruling information and the next steps to take on the case.

Like Comment

Write a comment...

6. When you are ready to respond, make sure to use the “Share an Update” post located in the upper right-hand corner.

The image shows a screenshot of a social media post interface. At the top left, the word "Post" is written in blue. Below it is a large white text input area. Underneath the input area is a smaller white text input field containing the placeholder text "Share an update...". To the right of this field is a blue button with the word "Share" in white. Below the "Share an update..." field is a search bar with a magnifying glass icon and the text "Search this feed...". To the left of the search bar is a button with an up and down arrow icon. To the right of the search bar are two buttons: one with a downward arrow icon and one with a refresh icon.