Energy Connect AU
Job Management Platform
Functional Requirement Specification

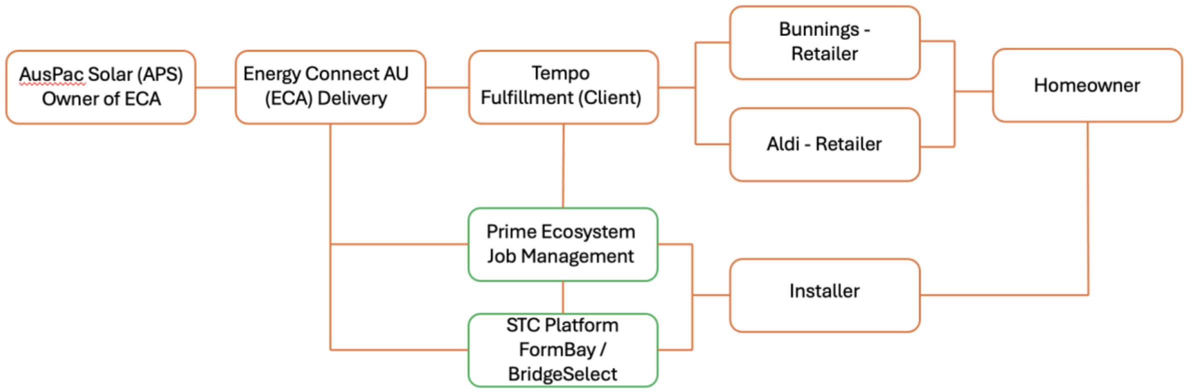
Document Control

Version	Date	Author	Summary of Changes
0.1	3 November 2025	Paul Barnes	Initial draft created
0.2	17 November 2025	Josie Haig	Added Scope, Requirements, Data Migration, Future Enhancements and Reference Documents
1.0	18 November 2025	Josie Haig	Final version prepared for development handover

1 Introduction

This document details the functional business requirements for the job management work tasks for Energy Connect AU.

AusPac Solar (APS) is the parent company of Energy Connect AU (ECA). ECA is currently contracted by Tempo to coordinate and deliver solar installations for customers of ALDI and other retailers. ECA works with qualified installers to ensure that all solar, battery, and inverter installations meet compliance and customer-service standards.



The current software, Prime Ecosystem, cannot support the business needs in a timely or scalable manner.

APS has therefore decided to invest in a new platform that better meets operational requirements and provides the business with agility as service offerings expand.

ECA requires a system that can manage job workflows for multiple Clients and Retailers, not just Tempo. As the business grows, additional Clients and Retailers will come onboard, and the platform must support different workflows, rules, templates, and communications based on the Client and/or Retailer associated with each job.

The core business process is centred around the “job,” which represents the customer site, installation requirements, and all associated scheduling, documentation, and compliance tasks.

There are currently many manual steps required to coordinate installations across multiple parties. The aim of this document is to define the business processes as they stand today, and the requirements for implementing a more suitable, largely automated job-management platform that satisfies the following criteria:

- Customisable while minimising architectural debt,
- Provides a mobile app that facilitates communication between the Installer, the Customer and Energy Connect AU,
- Allow API integrations for two-way data integrations,
- Provide the ability to deliver highly customisable reports via interactive, geographical user interfaces,
- Integrate with any system such as Formbay, Xero, Pipedrive, OpenSolar and any other industry standard application / data source,
- Be able to manage the relationship between all parties,
- Supports different workflows and processes based on the Client and/or Retailer.

1.1 Current System Pain Points

- No ability to assign jobs in bulk, each job must be updated manually
- Jobs are not properly linked to installer contacts (company vs individual)
- Notification templates cannot pull key data fields (e.g. date, time, installer)
- Limited automation of notifications, most communications require manual trigger
- Custom fields are rigid - no default values, no conditional logic, and deactivating options breaks historical data
- Manual creation of work orders, no auto-generation from job data
- No rule-based assignment (e.g. by region, capability, or availability)
- Trade and Customer portals lack functionality and do not support real workflows
- Poor data relationships between Client, Retailer, Job, Customer, Site, and Installer
- System performance is buggy and unintuitive for staff

1.2 Objectives and Success Criteria

- Improve operational efficiency across all job management stages
- Reduce manual data entry and repetitive administrative tasks
- Build reliable, automated workflows that reduce human error
- Improve installer allocation and scheduling visibility
- Support different workflows, templates, and rules per Client and Retailer

- Ensure clean data relationships (Client > Retailer > Job > Customer > Site > Installer)
- Provide a system that is stable, fast, intuitive, and mobile-friendly
- Enable staff to schedule and update 100+ jobs per week with minimal manual effort
- Allow installers to accept jobs and upload documentation via a dedicated portal
- Automate communications while ensuring accuracy and consistency
- Provide actionable reports and dashboards for scheduling, compliance, and job status

2 Scope

This section outlines the core functional components required for the implementation of a job management platform for Energy Connect AU. The scope is structured into key components, each describing the functionality, purpose, and phase in which it will be delivered.

Component	Description	Delivery Phase

3.1 Contacts	• Client (e.g. Tempo)
	  ○ Retailer (e.g. ALDI Solar, Bunnings)
	• Installer (Company)
	  ○ Installer (Individual)
	• Customer
	• Suppliers
	• Logistics / Delivery partners
		Phase 1

3.2 Job Management	• Clients must be able to create new jobs via a public job submission link or portal • Complete job lifecycle management: scheduling, work orders, installation progress, post-installation activities • Ability to manage jobs in bulk (assign installer, update dates, update status) • Auto-assignment logic (e.g. by region)	Phase 1
3.3 Work Orders	• Ability to generate a Work Order for each job • Work Order must pull selected Job fields (client, customer, scope, site etc) and a list of priced line items and allowances • Support multiple templates per Client/Retailer (layout, wording, inclusions) • Output to PDF, stored against the Job record and available to email	Phase 1
3.4 Items & Pricing	• Central database of standard labour and material items (code, description, unit, category) • Stores buy price, sell price and/or allowance values, with ability to vary pricing by Client/Retailer if required	Phase 1

	• Items selectable when building a work order so pricing is pulled in automatically	
3.5 Document Management	• Central document repository • Auto-generation of work orders, checklists, handover packs into PDF to email to Client, Customer and/or Installer	Phase 1
3.6 Reporting	• Interactive dashboards (Scheduling, Installation Progress, Installer Allocations, KPIs) • Ability to export filtered datasets to CSV	Phase 1
3.7 Notifications / Communications	• Integration for email and SMS service • Central template library for email and SMS (Client-specific and Retailer-specific versions) • Templates must support variable fields (installation date, time, installer, customer name, site address etc) • Automated triggers (reschedule, installer removed, installer assigned, job completed) • Manually send communications	Phase 1
	Installer and Customer communications	Phase 2 or 3
3.8 User Access	Role-based permissions for: Admin, Account Manager, Installation Manager, Installer (internal team), Client (read only)	Phase 1
3.9 Calendar / Availability	Calendar / Availability Module – centralised calendar for Installer (Company) and Installer (Individual) availability. Supports manual updates and displays assigned job data. External calendar or installer job-system sync to be delivered in a future phase.	Phase 1 or 2
3.10 Integrations	STC Aggregator – Formbay	Phase 2
	STC Aggregator – Bridge Select	Phase 2 or 3
	Provide an open API endpoint to allow Client/Retailer partners to automatically create new jobs	Phase 2
	OpenSolar (pull design/system details, proposal data, PDF attachments)	Phase 2 or 3
3.11 Portals	• Installer portal (job list, accept/decline job, upload notes/photos/documents, calendar view, on-site forms/checklists) • Client portal (job list, status, scheduling information, upload new job, upload to existing job)	Phase 2
	Customer portal (installation details, access documents, upload documents, light job tracking)	Phase 3
3.12 Installer Onboarding	• Installer companies can self-register via public link • Provide business details, staff details, regions serviced • Upload licences, insurance, compliance documents • Internal approval workflow before jobs can be assigned	Phase 2 or 3
3.13 Job Marketplace	• Ability for Energy Connect AU to post available jobs to installers based on region • Installers can submit a bid	Phase 3

	• Installer can provide their availability • Clients can approve the selected bid (optional workflow)	
3.14 Task Management	• Create tasks and assign them to a user • Allow manual creation of tasks • Auto-create tasks based on workflow triggers (e.g. status change, missing data, installer follow-up) • Configure task priority, default due dates, reminders, and escalation rules	Phase 2
3.15 Workflows	• End-to-end job status workflows, including status definitions, transitions, Happy Paths and Exception Paths • Must support Client/Retailer-specific variations (future phase)	Phase 1

3 Requirements

3.1 Contacts

- The system must support structured contact records for all stakeholders involved in the job lifecycle, with clear relationships between Clients, Retailers, Jobs, Customers, Sites, and Installers
- All Contact fields are defined in the Data Fields - Contacts spreadsheet tab
- Support distinct contact types:
  - Client (e.g. Tempo)
    - Retailer (e.g. ALDI Solar, Bunnings)
  - Installer (Company)
    - Installer (Individual)
  - Customer
    - Site Contact
  - Suppliers
  - Logistics / Delivery partners
- Store separate fields for each contact type (e.g. licences and regions for installers, site/contact details for customers)
- Link Installer Individuals to their parent Installer Company
- Store compliance documents (licences, insurance, certifications) against Installer Companies and Individuals
- Installer Companies must be assigned to one or multiple Regions from a central Region dataset
- Associate Clients and Retailers to Jobs, with workflows and templates controlled by the Client/Retailer

- Link Jobs to Customers and Sites with clean, consistent data relationships
- Contacts must be available for use in scheduling, work orders, portals, notifications, and reporting
- Support scalable multi-client/multi-retailer structures for future expansion

3.2 Job Management

This section outlines the core functions required to manage a job record throughout its lifecycle. It covers job creation, job field configuration and audit history. The system must support multiple Clients and Retailers, each with their own fields, rules, and configurations.

3.2.1 Job Creation

A new job is submitted by the Client via a public job submission link (Phase 1), portal (future phase), or API endpoint (future phase). Upon submission, the system must create a new Job record and associate it with the relevant Client, Retailer, Customer, and Site.

The data captured during job creation includes the following categories: *Client Information, Customer Information, Job Scope, System Information, Site Information; Install Information*

All job fields are defined in the Data Fields – Job spreadsheet tab. The "Job Creation" column indicates which fields are required at job submission, with all other fields used internally during job management.

3.2.2 Job Field Configuration

Management of job fields must be available through an admin configuration portal. Administrators must be able to add new fields, edit existing fields, activate/deactivate fields, control mandatory behaviour, and manage dropdown options. The system should support client-specific and retailer-specific customisation, allowing certain fields to be visible or applicable only for selected Clients or Retailers.

The platform should also support field-level logic, including default values, conditional behaviour, and show/hide rules based on other field values or Client/Retailer configurations.

3.2.3 History

- A dedicated History tab must be available on every Job record to display all logged actions
- The system must record a full history of all actions performed on a job
- Each history entry must include:
    - Timestamp

    - User who performed the action
    - Field changed (from > to)
- Users must be able to add manual notes to a job
- Notes must support visibility settings:
    - Internal only
    - Visible to Installer portal (later phase)
    - Visible to Client portal (later phase)
- All system-generated communications (emails, SMS, automated notifications) must be logged against the job
- All status changes must be automatically recorded in the job history
- History must be read-only and cannot be modified or deleted

3.2.4 Job Status Management

The system must support configurable Job Stage and Status fields. Status values and transitions are defined in Section 3.13 Workflows.

3.2.5 Region Mapping

A central Region dataset will define Regions and their associated postcode ranges. When a Job is created, the system must determine the Job's Region based on the postcode. Installer Companies may be assigned to one or more Regions, and this Region value must be used in scheduling and installer allocation logic.

Refer to the Data Fields - Region spreadsheet tab.

3.3 Work Orders

- The system must generate a Work Order document for each job
- The Work Order must pull selected data from the Job record (customer details, site details, system type, installation requirements, assigned installer, scheduled date etc)
- The Work Order must include pricing line items and allowances selected from the 3.4 Items & Pricing catalogue
- When an item is added to a Work Order, a copy of the item (description, quantity, pricing, allowances) must be editable on the Job/Work Order without changing the original catalogue item
- Users must be able to manually add custom line items to a Work Order (description, quantity, pricing, allowances) without requiring the item to exist in the catalogue
- Support multiple templates, configurable per Client/Retailer
- Output the Work Order as a PDF and automatically attach it to the Job record

- Allow staff to regenerate an updated Work Order if job details or pricing change
- Allow emailing the Work Order directly to Installers and/or Clients
- Work Orders must be visible in the Installer and Client portals (future phase)
- All generated Work Orders must be retained for audit history

Example Work Order:

Tempo Group | ABN: 70 106 100 252

Level 15, 177 Pacific Highway
North Sydney NSW 2060
1300 88 66 05

Live life with Tempo

Job Pack J01111-0039

Issue Date. 04/11/2025

Issued To:	Sustaine Electrical		
Job Number	J01111	**Client Reference**	AS001474
Site Address	30 River Meadows Drive Upper Coomera QLD 4209	**Division**	ALDI Solar
Customer	Lachlan Aicken 0418666991 la@a4.com.au	**Installation Date**	11/11/2025
Site Contact			

Property Type	Residential		
System Type	Grid Connect - PV & Battery	**Installation Type**	New System
NMI	QB139105589	**Existing System Removal (no. of panels)**	Not Applicable -
Phase Type	One Phase	**Battery Install Location**	Outdoor
Mounting Structure	Roof	**Fireproofing**	Not Required
Roof Type	Tile Terracotta	**DNSP Connection Application Number**	
Building Height (Storeys)	One	**STC File**	Formbay
Additional Site Info			

J01111-0039

Electrical	Labour	Total
System Installation		
Solar System Installation - 6.6 kW PV (15 x 440W panels) + 5.5 kW hybrid inverter + 20.48 kWh battery (4 x 5.12 kWh modules)	1/job	$2,200.00
Terracotta tile roof allowance	1/job	$200.00

Totals		Totals
	Subtotal	$2,400.00
	GST	$240.00
	Total	**$2,640.00**

Page 1 of 1

3.4 Items & Pricing

- The system must include a central catalogue of labour and materials items
- All item and pricing fields are defined in the Data Fields - Items & Pricing spreadsheet tab
- Items can be linked to specific Retailers and items may only be selected on Jobs where the Job's Retailer matches the Item's Retailer value
- Items must be selectable when building a Work Order
- Changes to catalogue items must not affect previously generated Work Orders
- Support for active/inactive items

3.5 Document Management

- The system must provide a central location for storing all job-related documents
- Users must be able to upload documents (PDF, images, photos, certificates, forms, etc) against Job and Contact records
- Uploaded documents must store file name, upload date/time, and user
- Documents must be downloadable and viewable from the Job record
- Support document categories (e.g. Site Photos, Job Pack, Compliance, Photos, DNSP, Installer Docs)
- Work Orders and system-generated PDFs must auto-attach to the Job record
- Users must be able to upload multiple photos quickly (drag and drop or multi-select)
- Documents must be visible in Installer, Client and Customer portals (later phase) based on permissions

3.6 Reporting

- The system must provide configurable dashboards and reports for Job, Installer, and Client performance
- Reports must support filtering by Client, Retailer, Region, Installer, Date Range, and Job Status
- Users must be able to export report data to CSV or Excel
- Dashboards must display real-time metrics (e.g. jobs created, jobs scheduled, jobs completed, exceptions)
- Users must be able to save and reuse custom report views
- Permissions to control which reports each user role can access
- Support client-specific report visibility (Phase 2)

- Provide an interactive map view showing Job locations, with overlay of Installer locations. With filtering by Client, Retailer, Job Status (not essential for Phase 1, but highly desirable)

3.7 Notifications / Communications

- The platform must provide an email and SMS service (may require additional integration?)
- Provide a central template library for email and SMS notifications
- Support Client/Retailer specific template versions
- Templates must support variable fields (e.g. installation date, time, installer, customer name, site address, job number)
- Support automated sending of notifications based on workflow triggers, including:
  - Job created
  - Installer assigned
  - Installation date confirmed
  - Installer removed
  - Installation date removed
  - Job cancelled
  - Job completed
- Support manual sending of any template by users
- All notifications (automated and manual) must be recorded in the Job History
- In-portal messaging between Energy Connect AU, Installer, and Client (future phase)

3.8 User Access

The platform must support role-based access control, allowing administrators to configure user permissions based on role and responsibility. Access to system features must be configurable at an object level (e.g. Jobs, Contacts, Work Orders, Documents, Pricing Items), ensuring each role only sees or edits information relevant to their function.

Permissions should support:

- Visibility controls (view, edit, create, delete)
- Role-based restrictions
- Conditional access depending on job allocation, client assignment, or workflow stage
- Audit logging for all permission-controlled actions

Example roles and responsibilities are outlined below to support role-based permission design.

Roles	Description
Admin	System administrator with full platform access and configuration permissions.
Account Manager	1. Primary escalation point for Installations and Logistics 2. Oversees overall job progress for allocated Clients/Retailers 3. Assists with issue resolution when required
Installation Manager	1. Assigns jobs to Installers based on availability 2. Manages Installer communication and job progression through to completion 3. Recruits and manages Installers within allocated geographic regions
Installer (internal team)	Can view jobs assigned to them, including calendar and related job details.
Client/Retailer	Read-only access to their own Jobs, including dashboard and reporting visibility.

3.9 Calendar / Availability

The platform must include a centralised calendar to support job scheduling and installer availability.

- Display a calendar showing all jobs assigned to an Installer (Company) or Installer (Individual)
- Allow the Scheduling/Installation team to record installer availability (available / unavailable dates)
- Only installers marked as available should appear in the job allocation filtering
- Calendar must update automatically when installation dates are added, changed, or removed
- Internal installer users can view their own assigned jobs and availability
- Support multiple calendar views, including Day, Week, and Month
- Provide filtering such as by Installer, Region, Job Status
- Ability for Installers to update their own availability via portal/app (future phase)
- Optional sync with external calendars used by Installers (Google, Outlook, ServiceM8) (future phase)

3.10 Integrations (future phase)

The platform must support key third-party integrations to streamline job creation, compliance, and design data handling.

STC Aggregators

- Integrate with Formbay and Bridge Select to submit and retrieve STC/BSTC compliance data.

Job Creation API

- Provide an open API endpoint allowing Clients/Retailers to automatically create new jobs
- Support two-way communication (where the Client system allows), enabling status updates and key job milestones to be pushed back to the Client/Retailer system

Design & Proposal Data

- Integrate with OpenSolar to pull system design details, proposal data, and PDF attachments

3.11 Portals (future phase)

Portal access for Installers and Clients may be implemented either as dedicated portal interfaces or via restricted access to the core web application using role-based permissions. The key requirement is that external users only see and perform actions appropriate to their role. Portal functionality may include job lists, calendar, document access, status updates, notes, and messaging.

A dedicated mobile app for Installers must also be supported to allow job viewing, photo uploads, notes, and status updates in the field.

A customer-facing portal must allow customers to view relevant installation information, upload documents, and communicate with ECA and/or the Installer.

Detailed requirements for Portals will be provided in a future update to this specification.

3.12 Installer Onboarding (future phase)

The system must support an online onboarding process for Installers, allowing them to submit company details, compliance documents, licences and insurance information for approval.

Detailed requirements for Installer Onboarding will be provided in a future update to this specification.

3.13 Job Marketplace (future phase)

The system must support a job bidding model where available jobs are offered to Installers, Installers can submit bids or accept jobs, and Clients and can approve the selected Installer.

Detailed requirements for Job Bidding will be provided in a future update to this specification.

3.14 Task Management (future phase)

The platform must support task creation and workflow-driven task automation to ensure timely follow-up and operational consistency.

- Ability to create tasks and assign them to a user
- Allow manual task creation
- Auto-create tasks based on workflow triggers (e.g. status change, missing information, overdue installer response)
- Configure task priority, default due dates, reminders, and escalation rules
- Tasks must be visible in user dashboards

Example scenarios:

- Day after Installation Date: Task for Installation Manager to contact the Installer and confirm completion
- X days before Installation: Task to confirm all pre-installation activities are complete
- Jobs on Hold: Automated reminders to follow up with the Client or Customer
- Compliance Review: When installation is complete, auto-create a task for the Compliance Officer to review STC/BSTC documentation
- Missing Data Follow-up: When a job is moved to Referred Back, auto-create a task for the Account Manager to follow up with the Client
- Installer Response Required: When an Installer is allocated but does not provide dates within X days, auto-create a task for the Scheduling Team to chase availability
- Pre-Installation Checks: When a job moves to Pre-Installation, auto-create logistics tasks such as confirming stock delivery or pickup dates

3.15 Current Workflows

This section outlines the end-to-end workflow for managing a job from initial receipt through to finalisation. It reflects the current process used in Prime Ecosystem, however, the new platform must improve and streamline these workflows to reduce manual processing wherever possible. The workflow must support multiple Clients and Retailers, each with their own rules and configurations.

Status Summary

The following table outlines the current job statuses used in Prime Ecosystem, along with proposed updated status names to improve clarity and consistency in the new platform.

Stage	Status	Description
New Job	Initial Validation *New: Pending Validation*	Initial review of the new job to confirm all required information has been provided
New Job	Referred Back (Initial Validation) *New: Returned to Client*	Job is missing essential information and has been sent back to the Client for correction
Scheduling	Ready to Schedule *New: Ready for Scheduling*	All required information has been provided and the job is ready for scheduling activities to begin
Scheduling	Assigned (Pending Date) *New: Awaiting Installer Dates*	Installer has been assigned and is providing acceptance and proposed installation dates
Scheduling	Assigned (Pending Customer) *New: Awaiting Customer Confirmation*	Installer has accepted the job and proposed installation dates; confirming final date with the customer
Scheduled	Pre-Installation *New: Installation Booked*	Installation date has been confirmed with both the installer and the customer
Scheduled	*New: Installation in Progress*	Installation has commenced or is occurring over multiple days
Scheduled	*New: Installation Paused*	Installation cannot proceed due to a site, weather, stock, or design issue
Installation Complete	Post-Installation (Contact Installer) *New: Awaiting Installer Confirmation*	Installation is complete and awaiting installer confirmation that all required installation activities are finished
Installation Complete	Post-Installation Review *New: Compliance Review*	Installation is complete and is under review by the Compliance Officer
Installation Complete	Post-Installation (Pending Installer) *New: Non-Compliant – Awaiting Installer Action*	Installation has been assessed as non-compliant or missing required information - awaiting installer rectification
Closed	Completed	The job is fully complete and compliant
Closed	Cancelled	The job has been cancelled by the Client and/or Customer
On Hold	On Hold (Customer) *New: Customer Hold*	All work on the job is paused pending direction from the Customer
On Hold	On Hold (Tempo) *New: Client Hold*	All work on the job is paused pending direction from the Client
On Hold	*New: Internal Hold*	Work is paused due to an internal issue requiring resolution

The following statuses may be applied at any stage of the job lifecycle and therefore are not repeated in each individual workflow’s below:

- **Cancelled** — Job cancelled by Client or Customer

- **On Hold (Tempo)** — Client has paused the job
- **On Hold (Customer)** — Customer has paused the job

These statuses override the current workflow stage and pause normal progression until resolved.

3.15.1 Initial Validation

Status	**Initial Validation**
Description	Initial review of the new job by to confirm all required information has been provided. A technical review must be completed by ECA's internal Accredited Solar and Battery Installer. The review requires access to the customer provided site photos, system design and the data entered by the Client.
Status Trigger	New job received from Client
Happy Path	Move to **Ready to Schedule** once the technical review is successful
Exception Path	If any issues are identified, the job will be moved to **Referred Back (Initial Validation)** and sent back to the Client for correction
Notifications	Nil

3.15.2 Referred Back (Initial Validation)

Status	**Referred Back (Initial Validation)**
Description	Job is missing essential information and has been sent back to the Client for correction
Status Trigger	Missing or incorrect information identified during **Initial Validation**
Happy Path	Once the Client provides the corrected information, the job can be moved back to **Initial Validation** to restart the technical review
Exception Path	Nil
Notifications	Client notifications (email) triggered

3.15.3 Ready to Schedule

Status	**Ready to Schedule**
Description	All required information has been validated and the job is ready for scheduling. The Installation Manager will allocate the job to an Installer (Company) based on the Job Region and the Installer (Company) Region. Installer filtering logic should ensure only installers eligible for that Region are displayed.
Status Trigger	**Initial Validation** is completed successfully
Happy Path	Move to **Assigned (Pending Date)** once an Installer (Company) has been allocated
Exception Path	Nil
Notifications	Customer notifications (email & SMS) triggered

3.15.4 Assigned (Pending Date)

Status	Assigned (Pending Date)
Description	Installer (Company) has been assigned and is providing acceptance and proposed installation dates. The Installation Manager manages date allocation based on the Installer's availability. Installer availability is accessed via a calendar (future installer portal/app) or provided directly by the Installer (Company). If no suitable dates are available, the Installation Manager contacts the Installer (Company) to obtain an installation date.
Status Trigger	Installer (Company) allocated to the job
Happy Path	Once a suitable installation date is allocated: • Job notes are updated • Proposed Work Order is sent to the Installer (Company) for review • Status is updated to **Assigned (Pending Customer)**
Exception Path	If the Installer cannot provide a confirmed date, a different Installer must be allocated. Status is returned to **Ready to Schedule**.
Notifications	Client notifications (email) triggered. Installer notifications (emails) triggered.

3.15.5 Assigned (Pending Customer)

Status	Assigned (Pending Customer)
Description	The Installer (Company) has accepted the job and proposed an installation date. The Installation Manager contacts the customer to confirm the installation date. All communication with the customer must be documented (SMS, email, phone) and stored as an auditable communication record.
Status Trigger	Installer (Company) and Installation Date allocated to job
Happy Path	If the Customer agrees to the Installation Date: • Job notes are updated • Status is changed to **Pre-Installation**
Exception Path	If the customer is not available on the proposed date: • Customer availability is recorded • Status returns to **Assigned (Pending Date)** If the customer requests changes or additional clarification, common examples include: • Changing panel installation location or configuration • Requesting a different battery size • Requesting an additional installation • Requesting a review of additional works

	If the customer requests changes that require reassessment, the status moves to **On Hold (Tempo)** until the review is completed.
Notifications	Nil

3.15.6 Pre-installation

Status	**Pre-Installation**
Description	The installation date has been confirmed with both the Installer (Company) and the Customer.
Status Trigger	Installation date has been confirmed with both the Installer and the Customer
Happy Path	Pre-installation tasks completed prior to installation: • Customer receives a confirmation email and SMS with the installation date • Work Order is sent to the Installer (Company) with the confirmed installation date • Installer (Company) needs to advise which Installer (Individual) will be attending and approximate time of arrival to site • Client receives a notification to arrange stock delivery, including required delivery logistics • On the day prior to installation, both the Customer and Installer receive reminder SMS and email Once the installation date has passed, the job moves to **Post-Installation (Contact Installer).**
Exception Path	Changes to the confirmed installation date must follow the <u>Installer or Date Change Work Instruction</u>. Status may revert to **Assigned (Pending Date)**, **Assigned (Pending Customer)**, **Ready to Schedule**, or **On Hold**, depending on the scenario.
Notifications	Customer notifications (email & SMS) triggered. Client notifications (email) triggered. Installer notifications (email) triggered.

3.15.7 Post-Installation (Contact Installer)

Status	**Post-Installation (Contact Installer)**
Description	On the day of installation, the Installer must complete: • Pre-start Job Safety Analysis (JSA) (future phase) • STC/BSTC requirements in Formbay/Bridge Select (including serial numbers, electrical safety certificate and customer signature) • Connect the system to Wi-Fi and link to the EMS (Energy Management Software)

	The Installation Manager contacts the Installer the morning after the Installation Date to confirm completion.
Status Trigger	Installation Date has passed
Happy Path	If all installation requirements have been met, job moves to **Post-installation Review**.
Exception Path	• If the Installer cannot be contacted, the job remains in **Post-Installation (Contact Installer)** until contact is made • If the Installer was unable to complete the installation, the job moves to **Post-Installation (Pending Installer)**
Notifications	Nil
Notes	See Post-Installation Workflow Work Instruction

3.15.8 Post-Installation Review

Status	**Post-Installation Review**
Description	Installation has been completed and is now under review by the Compliance Officer. The Compliance Officer verifies that all compliance requirements have been met and confirms that the STC/BSTC file in Formbay/Bridge Select is complete.
Status Trigger	Installer has advised that installation is complete
Happy Path	If the STC/BSTC file is verified as complete and all compliance checks pass, the job moves to **Complete** and the Client is notified.
Exception Path	If the job is deemed non-compliant, it moves to **Post-Installation (Pending Installer)** for the Installer to rectify
Notifications	Nil
Notes	See Post-Installation Workflow Work Instruction

3.15.9 Post-Installation (Pending Installer)

Status	**Post-Installation (Pending Installer)**
Description	The installation has been assessed as non-compliant or missing required information. The Installation Manager contacts the Installer to advise of the non-compliance and request a timeframe for rectification.
Status Trigger	Compliance Officer has deemed job as non-compliant
Happy Path	Once the non-compliance has been rectified, the job moves back to **Post-Installation Review** for re-assessment by the Compliance Officer.
Exception Path	Job remains in **Post-Installation (Pending Installer)** until rectification is completed
Notifications	Nil
Notes	See Post-Installation Workflow Work Instruction

4 Data Migration

- Contact data (Clients, Retailers, Installers) will be exported from Prime and imported into the new platform
- Data mapping for Contact records will be completed as part of implementation
- Migration of existing Jobs from Prime is not essential, but may be explored to determine feasibility and value
- All new jobs created after go-live will be managed exclusively in the new platform

5 Future Enhancements

The following items are not required for the initial phases but should be considered during design to ensure the platform can support them in future phases:

- Stock and Logistics Management (stock levels, purchase orders, deliveries, warehouse integration)
- Accounting Integration (invoicing, accounts payable, accounts receivable, Xero integration)
  - Configurable at Client/Retailer level:
    - Invoice frequency
    - Invoicing milestones (job receipt, installer allocated, job completion)
    - Contracted payment percentage
- Quoting Module (ability to create quotes for jobs)
- Installer Capability Filtering. System should support filtering appropriate Installers for jobs based on rules such as:
  - Installer does not install on certain roof types
  - Installer is not battery accredited
  - Installer works for selected Clients/Retailers only
- Phone System Integration (call logs, missed-call tracking, click-to-call)
- Expanded Job Types. Support additional job types such as Maintenance, Warranty Claims, Make Safe and Inspections. Job fields, workflows and requirements may differ based on Type, so the system must allow type-specific configuration
- Job Linking. Ability to link related jobs (e.g. installation > warranty claim > maintenance visit)
- CRM module for management of recruiting installers
- Smart Contracts - ability to hold retailer funds in escrow, with automated payment release to the Installer when specified job milestones or compliance checks are successfully completed.

- SMS Surveys - automated post-installation SMS surveys for both customer and installer, including option for the customer to leave a Google Review
- Yearly Maintenance – automated reminder sent 12 months after installation to notify the customer their system is due for its annual maintenance check, with the option for the customer to request a booking

6 Reference Documents

The following documents support or expand on the requirements in this specification:

- Installer or Date Change Work Instruction
- Post-Installation Workflow Work Instruction
- Data Fields spreadsheet