



Website

8 pages in Spanish and English

Note: Let's use an Affiliate plug-in so that agents can share their link version of the website to capture leads *However all of the form field must be captured in the Consultant and Admin Dashboard as a "Lead"

Note: Set the Affiliate plugin up so that each affiliate only gets paid commissions on their sub affiliates if they have sales that they personally initiated. (See CRM for details)

Affiliate Commission

Earn 2.5% of sub affiliate commissions (*if you have 1 to 3 personal sales per calendar month

Earn 5% of sub affiliate commissions (*if you have 4 or more personal sales per calendar month

Note: Let people be able to sign up automatically by using their Google account. Setup CRM to be able to pay commissions directly to the PayPal accounts associated with their Google Account

Header

Transparent Header... the header should have a little bit of tint

1. Bmpowered Logo
2. Clickable Phone Number
3. Menu (Solar, Residential Roofing, About Us
4. Tint to make the logo, phone number and menu out.

.

1 Solar Page:

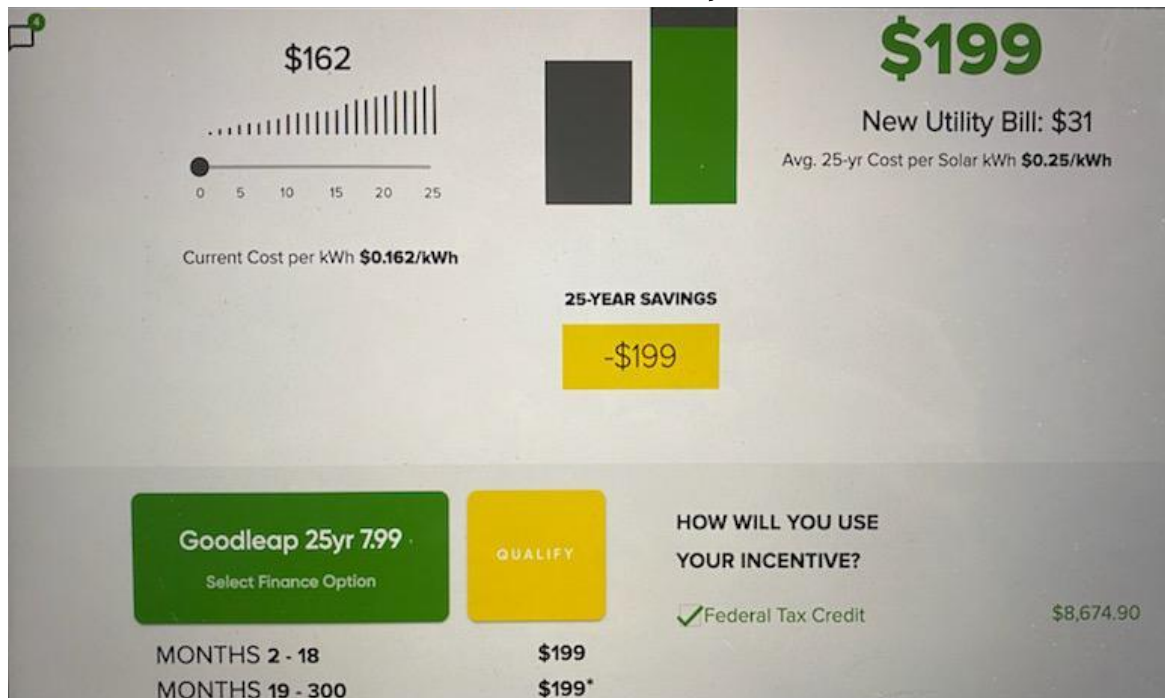
1. Background Image should cover the entire visible screen on both mobile and desktop devices

5. Should cover the entire visible screen on both mobile and desktop devices on all devices near the bottom of the screen
6. Floating Title: "Up to 70% funding for Businesses and Nonprofits"
7. A+ BBB Rating icon should be visible on all devices near the bottom of the screen
8. RCAT icon plus Commercial Roofing Licence #

9. Minority Owned icon (use official logo)
10. Historically Underutilized Business icon (use official logo)
11. Veteran Partner icon
12. Video - plays full screen
13. **Get Quote** form (under the video you can see it if you scroll down) (anchor 2)
 1. Nonprofit - Commercial- Residential (pulldown)
 2. Average Electric Bill (\$ amount)
 3. Electric Company
 4. Cash or Financed (pulldown menu)


Done button - create a quote like the one in the illustration below :

- Current Utility Bill compared to Solar (*customers can click on the 5, 10, 15, 20 and 25 years to show inflation for the Current Utility Bill section. 5% increase per year.
- 25 year savings
- Federal Tax Credit 30% of the cost of the system
- Tax Deduction 80% of the cost of the system




- Book Meeting - choose date and time to meet with the Consultant that the affiliate link belongs to. *default to the admin if no affiliate link is selected.

Select staff



Eli Sivan

eli@bmpowered.us



007@bmpowered.us

007@bmpowered.us

< May 2023 >

Time

Sun	Mon	Tue	Wed	Thu	Fri	Sat
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

05/02/2023

9:00 AM	9:25 AM	9:50 AM
9:25 AM	9:50 AM	10:15 AM
10:15 AM	10:40 AM	11:05 AM
10:40 AM	11:05 AM	11:30 AM
11:30 AM	11:55 AM	12:20 PM
11:55 AM	12:20 PM	12:45 PM
12:45 PM	1:10 PM	1:35 PM
1:10 PM	1:35 PM	2:00 PM

Note: when the customer Books Meeting they must their:

1. Select Consultant
(defaults to the consultant who the affiliate link belongs to. If no Affiliate link is used the default will be the Admin, who will be able to keep or reassign that appointment.
*The person that sets the appointment receives 40% (example Admin) and the Person that completes the Meeting gets 60%)
2. Date /Time
(Meeting time based on available times in each consultant's calendar. Dates and times need to include same day appointments. We need a [“Immediate Appointment”](#) button that allows the booking process to be skipped altogether.
3. Name
4. Customer ID
5. Married or Single (pulldown)
6. Spouse Name (if married)
7. Username and Password
8. **Submit button** :
 - redirects the customer to “Login” section of the page directly below the Incentive Program. (very bottom of the page.

- creates a Customer Dashboard profile using the username and password that the customer selected. *the system needs to not avoid duplicates and username and password must be the same alphanumeric combination.
- If an affiliate link was used it creates lead record and a downloadable quote / solar contract in the Consultant's Dashboard in the form of a fillable pdf file.
- The username and password must be the same alphanumeric combination. Example: Username George Password: George

2. Roofing

Background Image should cover the entire visible screen on both mobile and desktop devices
Floating Title: "Get up to 30% Roof Reimbursement"

Other items that should float above the background image / video:

1. A+ BBB Rating icon should be visible on all devices near the bottom of the screen (use official logo)
2. RCAT icon plus Commercial Roofing Licence #
3. Minority Owned icon (use official logo)
4. Historically Underutilized Business icon (use official logo)
5. Veteran Partner icon

Play button should float over the background. Clicking this button will play the introductory video in full screen on desktop and mobile devices. When it finishes playing the screen it should redirect to the "Get Help" button (anchor) on the same page under the video.

3 Testimonials with smaller "Get Help" buttons under each one. (Each video needs a changeable cover.)

- Testimonial 1 video, a short caption and a "Get Help" button
- Testimonial 2 video, a short caption and a "Get Help" button
- Testimonial 3 video, a short caption and a "Get Help" button

Get Help (form below)

- Do you own the property? (Yes or No pulldown)
- Nonprofit or Residential (pulldown)
- Name
- Customer ID
- Date of damage
- Insurance Company
- Electric Company
- Digital Signature
- Select Username and Password (used to sign into the Customer Dashboard)
- **Submit button :**
- redirects the customer to "Login" section of the page directly below Testimonials. (very bottom of the page.
- creates a Customer Dashboard profile using the username and password that the customer selected. *the system needs to not avoid duplicates and username and password must be the same alphanumeric combination.
- If an affiliate link was used it creates a lead record and a downloadable quote / solar contract in the Consultant's Dashboard in the form of a fillable pdf file.
- The username and password must be the same alphanumeric combination. Example: Username George Password: George

3. Commercial Roofing (HiddenPage):

1. Background Image...

Should cover the entire visible screen on both mobile and desktop devices

6. Floating Title: "50 Year Roof" and bullet points :
"Reduce Energy Bill"
"No hazardous tear down"
"Hail Resistant and leak proof"
7. A+ BBB Rating icon should be visible on all devices near the bottom of the screen (use official logo)
8. RCAT icon plus Commercial Roofing Licence #
9. Minority Owned icon (use official logo)
10. Historically Underutilized Business icon (use official logo)
11. Veteran Partner icon

Play (button) should float over the background. Clicking this button will play the introductory video in full screen on desktop and mobile devices. When it finishes playing the screen it should redirect to "instant quote" screen where they enter the following fields:

- Does your property have a flat roof? (Yes/No pulldown menu)
- Do you own the building? (Yes/No pulldown menu)
- Nonprofit - Commercial- Residential (pulldown menu)
- Commercial or Nonprofit)
- Average Electric Bill
- How many square feet does your property have?
- Get Quote (button will generate a quote based on \$6 per square foot. See quote description below:
- Quote Description:
- 50 Year Worry Free Roof
- Electric Bill compared Reduced Electric
- Savings in 5, 10, 15, 20, 25 years
- 50 Year Energy Savings
- Roof Cost
- Government Reimbursement (30% of roof cost)

Book Meeting:

- Select Consultant
- Date and Time
- Name
- Electric Company
- **Submit button :**
- redirects the customer to "Login" section of the page directly below Testimonials. (very bottom of the page.
- creates a Customer Dashboard profile using the username and password that the customer selected. *the system needs to not avoid duplicates and username and password must be the same alphanumeric combination.

- If an affiliate link was used it creates a lead record and a downloadable quote / solar contract in the Consultant's Dashboard in the form of a fillable pdf file.
- The username and password must be the same alphanumeric combination. Example: Username George Password: George

4. Subcontractor (Hidden)

1.Video

2. Login - redirects to Subcontractor Dashboard where they can:

- View and Accept contracts created by the Consultants or the Admin for: Roof, Commercial Roof, Solar and Construction
- Subcontractors need to be able update the status of the assignments that they accept
- Subcontractors must be able to have 2 way communication with customer that they are servicing * however the admin is able to view, modify and approve these before either party receives them.

3.Registration button (to become a contractor)

Form Items

- Company Name
- Roofing - Solar - Roofing and Solar
- License Type
- License #
- Name
- Phone Number
- Upload Driver's Licence
- Social or EIN
- Agree to Terms and Conditions (checkbox)
- Signature
- Submit (button)

Note: Registration to become a subcontractor requires the approval by the admin from the Admin console in the CRM

Note: once registered and approved the Subcontractor needs to be able to sign in using their Google account and paid through the PayPal associated with their Google account

CRM

1) CONSULTANT DASHBOARD

(Tab 1) "Leads Tab"

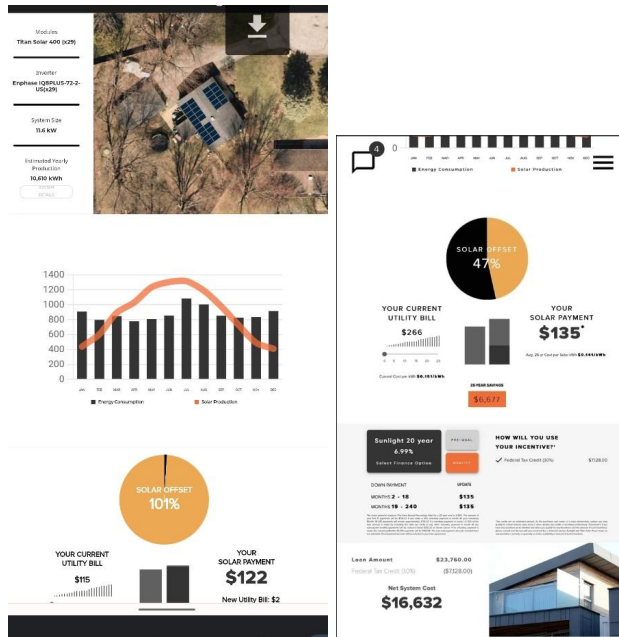
"Booking" option in the Solar and Commercial Roofing forms creates a lead for solar in the "Lead" tab of the Consultant Dashboard. "Submit" option on the Roofing form creates a lead for roofing in the "Lead" tab of the Consultant Dashboard.

Solar records will include the following sub tabs

1) "Proposal"

- view and modify the percentage of Solar coverage.
- Enter kWh for each of the 12 months and the cost per kWh. This will modify all of the other amounts.
- Digital Signature
- Download Contract which will be a fillable pdf with the Proposal graphics on the cover page.

"PROPOSAL" below are examples



(Tab 2)

"Pending Solar" tab

will display the installation status of the following:

1. Finances Approved (Consultant enters notes for this one status... the installer enters the rest)
2. Installer Assigned (Admin updates this status and the installer enters the rest)
3. HOA Approval (status)
4. City Permit (status)
5. Utility Permit (status)
6. Scheduling (start date and completion date)
7. Installation (status)
8. Inspection (status)
9. Interconnection (status)
10. PTO (status)

(Tab 3)

"Pending Roof" (tab)

will display the installation status of the following:

1. File Claim (internal) - Pending /Complete
2. Email Contingency - Pending /Complete (enter notes)
3. Claim Approved - Yes/No
4. Public Adjuster *Pending / Complete (Display if "Claim Approved" is "No". above...
Once "Public Adjuster" is "Complete" return to "Claim Approved"
5. Roofer Assigned - Yes / No
6. Work Started - Yes / No
7. Roof Complete - Yes / No

(Tab 4)

"Commissions" tab

1. List of records with the following components:
 - Customer Name
 - Roofing or Commercial Roofing or Solar
 - "Pending" and "Paid" commission
 - "Sale" or "Affiliate Bonus"
 - Amount
2. Running total of "Pending" and "Paid" commission

(Tab 5) "Marketing" Tab

Affiliate link and QR to the Consultant's alias website to capture leads.

1) SOLAR CALCULATIONS

When we enter "January kWh to December kWh" (12 months of usage) on the form, this need to calculate and auto-populate all the fields on *amount fields on the first page of the "solar.pdf"

*Monthly Payment (system cost divided by 300)

*Current Bill (add up 12 mo of usage and divide by 12 x .12 cents)

*5 Year, 10 Year, 15 Year, 20 Year, 25 Year

(multiply 1.06 x whatever the current year is = Year 2 Price

multiply 1.06 x Year 2 Price = Year 3 Price *repeat till you get year 5, 10 and etc.

Example

Current year = $\$389 \times 1.03 \times 12 \text{ months}$

Year 2 = $\$400.67 \times 1.03 \times 12 \text{ months}$

Year 3 = $412.69 \times 12 \text{ months}$

Example

Usage 10000 divided. by 508 = 19.68 round up 20 Modules

Panels 20 x .410 = 8.2 System Size

System Size 8.2 x P 4000 = \$32800 Cash Cost

Cash Cost x .30 = \$9840 Federal Credit

Cash Cost 32800 x .70 = \$25000 Net cost

Cash Cost x .80 = \$26240 Tax Deduction

2) CUSTOMER DASHBOARD

View status updates from the subcontractor for Solar, Roofing and Construction

A) Solar Tab

- *Installer Assigned (status)
- *HOA Approval (status)
- *City Permit (status)
- *Utility Permit (status)
- *Scheduling (start date and completion date)
- *Installation (status)
- *Inspection (status)
- *Interconnection (status)
- *PTO (status)

B) Roofing Tab

will display the installation status of the following:

- Claim Filed - Pending /Complete
- Claim Approved - Yes/No
- Roofer Assigned - Yes / No
- Work Started - Yes / No
- Notes
- Roof Complete - Yes / No

C) Commercial Roof Tab

Cash option

- *Work Started (status)
- *Notes (status)
- *Roof Complete (status)

Or

Insurance option

- *Claim Approved pending / complete *(updated by sales person)
- *Roofer Assigned yes/no
- *Contractor Deposit Paid
- *Work Started yes/no
- *Notes (status)
- *Roof Complete - Pending/ complete

NOTE: Each customer record needs communication setup between the customer and Assigned subcontractor.

Bmpowered.us - 2 way messaging with the admin

Crew - 2 way messaging with the Roofer, Solar Installer *(admin is able to view all of these messages and approve them or modify them before approving them. Approval button Let's the message go through to the other party.

NOTE: "Customer" need to be able to convert into a "Consultant" after their work is completed.

3) SUBCONTRACTOR DASHBOARD

A) View and accept assignment, upload license and sign Subcontractor paperwork.

B) 2 way messaging with the admin

C) 2 way messaging with the customer *(admin is able to view all of these messages and approve them or modify them before approving them. Approval button Let's the message go through to the other party.

D) Update the status of Solar Installs and Roofing Repairs seen below

Solar Tab

"Pending Installation" tab (SOLAR)

The Subcontractor will update the status which will appear in the Admin Dashboard. The Admin will confirm the updates from the Admin dashboard, which will update the Subcontractor Dashboard, the Consultant Dashboard and the Customer Dashboard.

1. Installer Assigned (updated by admin)
2. HOA Approval (status)
3. ICity Permit (status)
4. Utility Permit (status)
5. Scheduling (start date and completion date)
6. Installation (status)
7. Inspection (status)
8. Interconnection (status)
9. PTO (status)

Roofing Tab

"Pending Installation" tab (ROOFING)

will display the installation status of the following:

1. Roofer Assigned (status)
2. Public Adjuster (status)
3. Customer - agreed/disagreed (status)
4. Work Started (status)
5. Roof Complete (status)
6. Work Paid (status)

ADMIN DASHBOARD (Solar Tab)

View Records created by consultants. The Subcontractor updates the record status that the Admin sees, but the customer and consultant can't see those updates until the Admin confirms the status update.

SOLAR (ADMIN)

- *Payment received (internal. Notes)
- *Installer Assigned (internal Notes)
- *HOA Approval - Yes / No
- *City Permit - Yes / No
- *Utility Permit - Yes / No
- *Scheduling (start date and completion date)
- *Installation - Yes / No
- *Inspection - Yes / No
- *Interconnection - Yes / No
- *PTO - Yes / No
- *Subcontractor Paid - Yes / No
- *Consultant's Paid - Yes / No

ROOFING (ADMIN)

- File Claim (internal) - Pending /Complete
- Email Contingency - Pending /Complete (enter notes)
- Claim Approved - Yes/No
- Public Adjuster *Pending / Complete (Display if "Claim Approved" is "No". above...
Once "Public Adjuster" is "Complete" return to "Claim Approved"
- Roofer Assigned - Yes / No
- Work Started - Yes / No
- Roof Complete - Yes / No
- Bmpowered Paid - Yes / No
- Consultant's Paid - Yes / No

Note once the ADMIN updates the record to "Consultant Paid" and "Admin Paid" status, the record moves to the "Commission" tab of the Consultant Dashboard and ADMIN Dashboard

ADMIN DASHBOARD (Construction Tab)

Created custom job listings for Subcontractors.

- Project # (plus note)
- Project Title
- Project Description
- Deadline
- Required Documents
- Supporting Documents

- Assign customer - (optional: this will create a customer profile with login that the customer can use to view status updates)
- Create (button)

Subcontractor adds progress notes or status updates of "complete" which the admin can view and confirm. Once a status or note is confirmed by the Admin, the "customer" and "consultant" can view updates in their individual dashboards.

Examples:

1. Notes
2. Complete (status)
3. Work Paid (status)

Book Keeping tab (ADMIN)

Customer Name - Customer #

Contract Total \$xxx Received

Consultant Commission \$xxx. Pending / Paid

Recruiting Affiliate \$xxx Pending / Paid

Sub Contractor \$xxx Pending / Paid

Company Profit \$xxx Pending / Paid

ABOVE: is a template of customer records.

BELOW: is the workflow of the above template:

1. When our company receives payment, we enter the amount received in the "Contract Total" section and click "Received" this will add a "pending" amount for the
 - Subcontractor
 - Consultant
 - Recruiting Affiliate
 - Company Profit
2. Clicking "Paid" next to each of these will update the corresponding dashboards, including running Pending and Paid totals.

ROOFING 100%

- Subcontractor 85%
- Consultant 10%
- Recruiting Affiliates 1%
- Company Profit 4%
- I need to be able to add roofing items and cost and for each. When I click "Update" I need to create a "Scope of Work" attachment which will appear in the Subcontractors back office. This scope needs to reduce the cost of each item to 85% automatically.

SOLAR 4.0

- Subcontractor 2.2
- Consultant. .85
- Recruiting Affiliate.15
- Company Profit

FLAT ROOFING

- Subcontractor \$3.5 / Square foot
- Consultant \$.50 / square foot
- Recruiting Affiliate .10 / square foot
- Company Profit (Contract Rate minus \$4.10 per square.

CONSTRUCTION

- Subcontractor 85%
- Company Profit 15%

I need to be able to add construction items and cost and for each. When I click "Update" I need to create a "Scope of Work" attachment which will appear in the Subcontractors back office. This scope needs to reduce the cost of each item to 85% automatically.

PDF Sales Contracts

Roofing

https://drive.google.com/file/d/19aKnkFGWzzKNGp__lhQzpUglfeguc9w8/view?usp=drivesdk

Roofing Spanish

<https://drive.google.com/file/d/1cwlz0A-aJoFT8VAWuYegsjKsBVRQp-9R/view?usp=drivesdk>

Solar

<https://drive.google.com/file/d/1v9u6-rZHEzqz9FgUbA03-NZ3T4990gW1/view?usp=drivesdk>

Solar Spanish

https://drive.google.com/file/d/1CJBBiXMULYiu8z0H-Szg9_Eq_zWhrOgC/view?usp=drivesdk

Commercial Roofing

<https://drive.google.com/file/d/1TaQ0KYq828FYMjk9r2LyMRSsQsmy-wGm/view?usp=drivesdk>

Commercial Roofing Spanish

https://drive.google.com/file/d/1JO3pyvcd2GSR3HLwNAbB3h_y99069Kcw/view?usp=drivesdk

PDF Subcontractor Contracts

Roofing Subcontractor

<https://drive.google.com/file/d/1Hgijlb6Hx9xeiA3dHqqND8AHz6UAWUJ/view?usp=drivesdk>

Roofing Subcontractor Spanish

<https://drive.google.com/file/d/1VB0LHPKdPheU5alxHyfHaTEg0xoWbcYh/view?usp=drivesdk>

Solar Subcontractor

<https://drive.google.com/file/d/1g-AyuplIX0gnxg9esjlkQa-HY6SzCy9/view?usp=drivesdk>

Solar Subcontractor Spanish

https://drive.google.com/file/d/1QB51sAz15_HLTtXo3t4B-CdiXtJzbsAx/view?usp=drivesdk