

Ronald Rosignol
Super Admin

RESIDENTIAL

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Leads List

Search

Filter

Add New Lead

Customer Name	Customer Address	Customer Email	Lead Stage	Financier	Lead ID	Created Date
Alex Smith	123 Mainstreet, Hamilton NJ 08123	AlexSmith@yahoo.com	Created	Sunrun	L-123456789	6/1/2018 2:25 PM
Ryan Winston	33 Winston Ave, Hamilton NJ 08123	RyanWinston@yahoo.com	Created	Sunpower	L-234534556	6/1/2018 3:25 PM
John Doe	33 Winston Ave, Hamilton NJ 08123	JohnDoe@yahoo.com	Converted	Sunpower	L-945784897	6/1/2018 3:25 PM
Mark Smith	33 Winston Ave, Hamilton NJ 08123	JohnSmith@yahoo.com	Closed	LoanPal	L-428675333	6/1/2018 3:25 PM
Alex Smith	123 Mainstreet, Hamilton NJ 08123	AlexSmith@yahoo.com	Created	Sunrun	L-542398575	6/1/2018 2:25 PM
Ryan Winston	33 Winston Ave, Hamilton NJ 08123	RyanWinston@yahoo.com	Converted	Sunpower	L-325656678	6/1/2018 3:25 PM
John Doe	33 Winston Ave, Hamilton NJ 08123	JohnDoe@yahoo.com	Converted	Sunpower	L-444333221	6/1/2018 3:25 PM
Mark Smith	33 Winston Ave, Hamilton NJ 08123	JohnSmith@yahoo.com	Closed	LoanPal	L-233354356	6/1/2018 3:25 PM
Roger Rabbit	33 Rabbit St, Hamilton NJ 08123	TheRabbit@yahoo.com	Closed	LoanPal	L-987435352	6/1/2018 3:25 PM

Total Records Found: 9

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RESIDENTIAL COMMERCIAL LEADS OPPORTUNITIES PROPOSALS PROJECTS REFERRALS CANCELLATIONS

Lead Information Details

[Edit Lead](#)[Convert to Opportunity](#)

Lead ID: L-987435352

Customer Information

First Name	Roger	Last Name	Rabbit
Address	123 Roger Drive Hamilton NJ 08123	Home Type	Detached Single Family Home
Phone	(123) 456-6789	Alternate Phone	(123) 456-6789
Email	RogerRabbit@yahoo.com		

[New Note](#)

Additional Notes

Created By

Last Modified

Would like Ground Mounts and would like Black Solar ...

Rick Veltri

6/1/2018 2:25 PM

Lead Financier Options (Initial Offering)

Sunrun



SunPower



LoanPal



USPS



Lead Ownership Information

Sales Rep Rick Veltri

Lead Owner Rick Veltri

Lead Stage Created



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RESIDENTIAL COMMERCIAL LEADS OPPORTUNITIES PROPOSALS PROJECTS REFERRALS CANCELLATIONS

Add New Residential Lead

Customer Information

Lead ID: L-987435352

First Name*

Last Name*

Address* Street

Phone*

City

Alternate Phone

Zip

Home Type*

Email*

New Note

Additional Notes

Created By

Last Modified

Lead Financier Options (Initial Offering)

Sunrun

SunPower

LoanPal

USPS

Lead Ownership Information

Sales Rep Rick Veltri

Lead Owner Rick Veltri

Lead Stage Created

Cancel

Save Lead

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RESIDENTIAL COMMERCIAL LEADS OPPORTUNITIES PROPOSALS PROJECTS REFERRALS CANCELLATIONS

Opportunities List

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Filter



Customer Name	Customer Address	Customer Email	Sales Rep	Financier ¹	Lead ID	Created Date
Alex Smith	123 Mainstreet, Hamilton NJ 08123	AlexSmith@yahoo.com	Rick Veltri	Sunrun	L-123456789	6/1/2018 2:25 PM
Ryan Winston	33 Winston Ave, Hamilton NJ 08123	RyanWinston@yahoo.com	Rick Veltri	Sunpower	L-987653423	6/1/2018 3:25 PM
John Doe	33 Winston Ave, Hamilton NJ 08123	JohnDoe@yahoo.com	Rick Veltri	Sunpower	L-324954749	6/1/2018 3:25 PM
Mark Smith	33 Winston Ave, Hamilton NJ 08123	JohnSmith@yahoo.com	Rick Veltri	LoanPal	L-392584938	6/1/2018 3:25 PM
Alex Smith	123 Mainstreet, Hamilton NJ 08123	AlexSmith@yahoo.com	Rick Veltri	Sunrun	L-234054958	6/1/2018 2:25 PM
Ryan Winston	33 Winston Ave, Hamilton NJ 08123	RyanWinston@yahoo.com	Rick Veltri	Sunpower	L-329574287	6/1/2018 3:25 PM
John Doe	33 Winston Ave, Hamilton NJ 08123	JohnDoe@yahoo.com	Rick Veltri	Sunpower	L-428563873	6/1/2018 3:25 PM
Mark Smith	33 Winston Ave, Hamilton NJ 08123	JohnSmith@yahoo.com	Rick Veltri	LoanPal	L-238657827	6/1/2018 3:25 PM
Roger Rabbit	33 Rabbit St, Hamilton NJ 08123	TheRabbit@yahoo.com	Rick Veltri	LoanPal	L-278459683	6/1/2018 3:25 PM

¹ = Initial Financier

Total Records Found: 9

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Opportunity Information Details

Sunrun

SunPower

LoanPal

USPS

Edit

Request Design

Request Credit Check

Schedule Appointment

Assign Referral

Opportunity ID: Op-12345678

Customer Information

First Name Roger Last Name Rabbit

Address 123 Roger Drive Hamilton NJ 08123 Home Type Detached Single Family Home

Phone (123) 456-6789 Alternate Phone (123) 456-6789

Email RogerRabbit@yahoo.com

Utility Bill Information

Utility Company	PSEG	Utility State	NJ <th></th>	
January	200	February	300	March 200
April	200	May	200	June 200
July	300	August	200	September 300
October	300	November	100	December 300
Annual kWh Usage		2,800.00		

Upload

Utility Bill Images

	Document Type	Created By	Last Modified
Image 12345.jpg	Utility Bill	Rick Veltri	6/1/2018 2:25 PM
Image 13456.jpg	Utility Bill	Rick Veltri	6/1/2018 2:25 PM
Image 12223.jpg	Utility Bill	Rick Veltri	6/1/2018 2:25 PM
Image 12243.jpg	Utility Bill	Rick Veltri	6/1/2018 2:25 PM

Preliminary Design

	Created By	Last Modified
Design 123456	Jayson Dittman	6/1/2018 2:25 PM

Proposal ID	Proposal Name	Agreement Type	Stage	Created By	Last Modified
PK123456789	Proposal_7500	PPA	Created	Rick Veltri	6/1/2018 2:25 PM

Add New

Contact Roles	Email	Phone	Role	Last Modified
Roger Rabbit	RogerRabbit@yahoo.com	(123) 456-6789	Homeowner	6/1/2018 2:25 PM
Roger Rabbit	RogerRabbit@yahoo.com	(123) 456-6789	Contract Signer	6/1/2018 2:25 PM
Roger Rabbit	RogerRabbit@yahoo.com	(123) 456-6789	Utility Bill Contact	6/1/2018 2:25 PM
Roger Rabbit	RogerRabbit@yahoo.com	(123) 456-6789	Credit Contact	6/1/2018 2:25 PM

Credit Records	First Name	Last Name	Credit Email	Credit Status	Credit Run Date
	Roger	Rabit	RogerRabbit@yahoo.com	PASS	6/1/2018 2:25 PM

Appointments	Start Date/Time	End Date/Time	Appointment Type	Assigned To	Status	Last Modified
Appt-12345678	6/22/2018 8:00am	6/22/2018 9:30am	Site Audit	Mike Emmons	Appointment Set	6/1/2018 2:25 PM

Opportunity Management

Sales Rep Rick Veltri Opportunity Stage 4 - Agreement Signed

New Note

Additional Notes	Created By	Last Modified
Would like Ground Mounts and would like Black Solar ...	Rick Veltri	6/1/2018 2:25 PM

Lead Ownership Information

Sales Rep Rick Veltri Lead Owner Rick Veltri Lead Stage Converted

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Proposal ID	Opportunity ID	Customer Name	Customer Address	Sales Rep	Credit Status	Proposal Type	Financier
PK-123456789	Op-123456789	Alex Smith	123 Mainstreet, Hamilton NJ 08123	Rick Veltri	PASS	PPA	Sunrun
PK-123456788	Op-123456788	Ryan Winston	33 Winston Ave, Hamilton NJ 08123	Rick Veltri	PASS	Lease	Sunpower
PK-987643212	Op-987643212	John Doe	33 Winston Ave, Hamilton NJ 08123	Rick Veltri	PASS	Loan	Sunpower
PK-543216543	Op-543216543	Mark Smith	33 Winston Ave, Hamilton NJ 08123	Rick Veltri	FAIL	Cash	LoanPal
PK-987678967	Op-987678967	Alex Smith	123 Mainstreet, Hamilton NJ 08123	Rick Veltri	PASS	PPA	Sunrun
PK-234234233	Op-234234233	Ryan Winston	33 Winston Ave, Hamilton NJ 08123	Rick Veltri	PASS	PPA	Sunpower
PK-322234456	Op-322234456	John Doe	33 Winston Ave, Hamilton NJ 08123	Rick Veltri	PASS	Loan	Sunpower
PK-568585843	Op-568585843	Mark Smith	33 Winston Ave, Hamilton NJ 08123	Rick Veltri	PASS	Loan	LoanPal
PK-876567899	Op-876567899	Roger Rabbit	33 Rabbit St, Hamilton NJ 08123	Rick Veltri	PASS	Cash	LoanPal

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Proposal Information Details

Edit

Submit Proposal

Financier: Sunrun
Proposal ID: PK-12345678

Customer Information

First Name	Roger	Last Name	Rabbit
Address	123 Roger Drive Hamilton NJ 08123	Home Type	Detached Single Family Home
Phone	(123) 456-6789	Alternate Phone	(123) 456-6789
Email	RogerRabbit@yahoo.com		

Proposal Details

Sales Rep	Rick Veltri	Sales Rep Email	RickVeltri@uspower.com	Stage	Created	Assignee
Financier	Sunrun					Pending Tasks
Installer	Sunrun					Declined Reason

Declined Notes

Utility Bill Information

Utility Company	PSEG	Utility State	NJ
January	200	February	300
April	200	May	200
July	300	August	200
October	300	November	100
Annual kWh Usage		2,800.00	

GENERATED DOCUMENTS

Document Name	Document Type	Created Date
Customer-Agreement.pdf	Customer Agreement	6/1/2018 2:25 PM
Design-Plan.pdf	Design Plans	6/1/2018 2:25 PM
nem-agreement	NEM Agreement	6/1/2018 2:25 PM
Proposal.pdf	Proposal	6/1/2018 2:25 PM
Site-Audit-Printout.pdf	Site Audit Printout	6/1/2018 2:25 PM

Actions: None Selected

Next

WORKING DOCUMENTS

Document Name	Document Type	Recipient Status	Last Modified Date
Customer-Agreement.pdf	Customer Agreement	Signed	6/1/2018 2:25 PM
Design-Plan.pdf	Design Plans	Signed	6/1/2018 2:25 PM
nem-agreement	NEM Agreement	Signed	6/1/2018 2:25 PM

Actions: None Selected

Next

MISC DOCUMENTS

Document Name	Document Type	Created Date
Example.pdf	Other	6/1/2018 2:25 PM
Image1.jpg	Utility Bill	6/1/2018 2:25 PM
Image2.jpg	Utility Bill	6/1/2018 2:25 PM
Image3.jpg	Utility Bill	6/1/2018 2:25 PM
Image4.jpg	Utility Bill	6/1/2018 2:25 PM

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Project ID	Customer Name	Customer Address	Sales Rep	Proposal Type	Project Status	Financier	Installer
PR-123456789	Alex Smith	123 Mainstreet, Hamilton NJ 08123	Rick Veltri	PPA	Open	Sunrun	Sunrun
PR-123456788	Ryan Winston	33 Winston Ave, Hamilton NJ 08123	Rick Veltri	Lease	Open	Sunpower	Sunpower
PR-987643212	John Doe	33 Winston Ave, Hamilton NJ 08123	Rick Veltri	Loan	Open	Sunpower	USPS
PR-543216543	Mark Smith	33 Winston Ave, Hamilton NJ 08123	Rick Veltri	Cash	Complete	LoanPal	USPS
PR-987678967	Alex Smith	123 Mainstreet, Hamilton NJ 08123	Rick Veltri	PPA	Cancelled	Sunrun	Sunrun
PR-234234233	Ryan Winston	33 Winston Ave, Hamilton NJ 08123	Rick Veltri	PPA	On-Hold	Sunpower	Sunpower
PR-322234456	John Doe	33 Winston Ave, Hamilton NJ 08123	Rick Veltri	Loan	Open	Sunpower	USPS
PR-568585843	Mark Smith	33 Winston Ave, Hamilton NJ 08123	Rick Veltri	Loan	Open	LoanPal	USPS
PR-876567899	Roger Rabbit	33 Rabbit St, Hamilton NJ 08123	Rick Veltri	Cash	Open	LoanPal	USPS

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Project Information Details



PR-1335736010

Status: Open

New Task

On Hold

View All Notes

CUSTOMER	OPPORTUNITY	ADDRESS	PROPOSAL	SOW	360	FINANCIER	INSTALLER
Martina Leonardo	Op-123456789	412 Frankford Avenue-08012	PKKA4AZAAFN7-H	SOW-098576	360 View	SunPower	USPS

DETAILS PROJECT ROLES NOTES

Project Details

Project Status:	Open	Project Start Date:	6/16/2018	Agreement Type:
Service Contract Status:		Original Project Handoff:		Additional System:
Job Code:		Project Age (days):	1	Install Tracker Current ...
Customer Phone:	(856) 228-1536	Install Partner:	Sunrun	Install Tracker Current ...
Home Address:	412 Frankford Avenue Blackwood NJ USA 08012	Install Branch:	New Jersey South	Site Survey scheduled
Most Recent Customer ...		Jurisdiction:		VIP:
Sales Partner:	US Power Savers	Utility:	PSEG	Build Partner:
Salesperson:	Ricardo Smikle	Preferred Language:	English	Brightbox: <input type="checkbox"/>

Task Details

PHASE NAME		PHASE NUMBER	START DATE	END DATE	PHASE STATUS
Contract Approval		2			Open
NAME	CATEGORY	GROUP	OWNER	STATUS	SLA STATUS START DATE END DATE
Submit Proposal	Required	Contract Approval		Open	 6/16/2018 6:28 PM
Review and Approve Proposal	Required	Contract Approval		Inactive	
Introduction Call	Required	Project Coordinator		Inactive	
Site Audit		3			Open
NAME	CATEGORY	GROUP	OWNER	STATUS	SLA STATUS START DATE END DATE
Schedule Site Audit	Required	Associate Project Coordinator	Ricardo Smikle	Complete	6/16/2018 6:28 PM 6/16/2018 6:30 PM
Finish Site Audit	Required	Site Audit	Patrick Morgan	Open	 6/21/2018 8:00 AM
Design		4			Inactive
NAME	CATEGORY	GROUP	OWNER	STATUS	SLA STATUS START DATE END DATE
Layout + SOW Review	Required	Design Engineering		Inactive	
Prepare CAP Package	Required	Project Coordinator		Inactive	
Complete CAP Package	Required	Sales	Ricardo Smikle	Inactive	
Complete Design Package	Required	Design Engineering		Inactive	
Submit Post Site-Audit Change Order and Request NTP	Required	Project Coordinator		Inactive	
Pre-Installation Approvals		5			Inactive
NAME	CATEGORY	GROUP	OWNER	STATUS	SLA STATUS START DATE END DATE
Grant NTP	Required	Installation Review		Inactive	
Process Permit Certification	Required	Permitting		Inactive	
Receive Permit Certification	Required	Permitting		Inactive	
Submit Building Permit Application	Required	Permitting		Inactive	
Receive and Process Building Permit	Required	Permitting		Inactive	
Apply for Interconnection	Required	Interconnection		Inactive	
Confirm Receipt Of Interconnection Approval	Required	Interconnection		Inactive	
Submit Rebate Application	Required	Rebates		Inactive	
Receive Rebate Reservation (B)	Required	Rebates		Inactive	
Installation		6			Inactive
NAME	CATEGORY	GROUP	OWNER	STATUS	SLA STATUS START DATE END DATE
Project Handoff (F)	Required	Project Coordinator		Inactive	
Prepare for Install and Call Customer	Required	Installation Coordinator		Inactive	
Schedule Installation	Required	Installation Coordinator		Inactive	
Start Installation	Required	Installation Coordinator		Inactive	
Receive and Upload FIC	Required	Branch Coordinator		Inactive	
Punch List Items Added	Required	Branch Coordinator		Inactive	
Complete Installation	Required	Installation Coordinator		Inactive	
Submit M1 Proof	Required	Milestone Approvals		Inactive	
Sell Into TE Fund	Required	Milestone Approvals		Inactive	
Approve M1 Proof	Required	Milestone Approvals		Inactive	
Schedule Final Inspection	Required	Inspection Coordinator		Inactive	
Record Final Inspection Signoff (ESO)	Required	Inspection Coordinator		Inactive	
Upload Hard Copy of Building Permit to Service Contract (A)	Required	Inspection Coordinator		Inactive	
Perform Final (ESO) Call	Required	Installation Coordinator		Inactive	
Submit Meter Registration	Required	Meter Registration		Inactive	
Submit M2 Proof	Required	Installation Coordinator		Inactive	
Approve M2 Proof	Required	Milestone Approvals		Inactive	
Perform Installation Complete Call	Required	Installation Coordinator		Inactive	
Completion		7			Inactive
NAME	CATEGORY	GROUP	OWNER	STATUS	SLA STATUS START DATE END DATE
PTO Check-In	Required	Project Coordinator		Inactive	
Submit Final Rebate Claim (A)	Required	Rebates		Inactive	
Submit Final Interconnection	Required	Interconnection		Inactive	
Submit M3 Proof (PTO)	Required	Interconnection		Inactive	
Approve M3 Proof	Required	Milestone Approvals		Inactive	
Activation Call	Required	Project Coordinator		Inactive	
Confirm System Production	Required	Project Coordinator		Inactive	

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Referrals List

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Add New Referral

Referred By	Lead ID	Customer Name	Customer Address	Sales Rep	Project Status	Financier	Payout
John Jones	L-123456789	Alex Smith	123 Mainstreet, Hamilton NJ 08123	Rick Veltri	Open	Sunrun	\$350
Michael Smith	L-123456788	Ryan Winston	33 Winston Ave, Hamilton NJ 08123	Rick Veltri	Open	Sunpower	\$350
Alex James	L-987643212	John Doe	33 Winston Ave, Hamilton NJ 08123	Rick Veltri	Open	Sunpower	\$350
Mark Randall	L-543216543	Mark Smith	33 Winston Ave, Hamilton NJ 08123	Rick Veltri	Complete	LoanPal	\$350
Melissa Sharf	L-987678967	Alex Smith	123 Mainstreet, Hamilton NJ 08123	Rick Veltri	Cancelled	Sunrun	\$350
Jessica Martin	L-234234233	Ryan Winston	33 Winston Ave, Hamilton NJ 08123	Rick Veltri	On-Hold	Sunpower	\$350
Frank Thomas	L-322234456	John Doe	33 Winston Ave, Hamilton NJ 08123	Rick Veltri	Open	Sunpower	\$350
Marci Evans	L-568585843	Mark Smith	33 Winston Ave, Hamilton NJ 08123	Rick Veltri	Open	LoanPal	\$350
John Headley	L-876567899	Roger Rabbit	33 Rabbit St, Hamilton NJ 08123	Rick Veltri	Open	LoanPal	\$350

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Add New Residential Referral

Referrer Information

First Name* Last Name* Address* StreetPhone* City Alternate Phone Zip Email*

Current Referral Promotion Information

Sunrun \$350 Visa Gift Card

SunPower \$350.00

LoanPal \$350.00

USPS \$350.00

Note: Once a Referral Record is created, you can associate the Referral to an existing Opportunity

[Cancel](#)[Save Referral](#)

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Customer Name	Customer Address	Customer Email	Sales Rep	Financier ¹	Opportunity ID	Cancellation Date
Alex Smith	123 Mainstreet, Hamilton NJ 08123	AlexSmith@yahoo.com	Rick Veltri	Sunrun	Op-123456789	6/1/2018 2:25 PM
Ryan Winston	33 Winston Ave, Hamilton NJ 08123	RyanWinston@yahoo.com	Rick Veltri	Sunpower	Op-987653423	6/1/2018 3:25 PM
John Doe	33 Winston Ave, Hamilton NJ 08123	JohnDoe@yahoo.com	Rick Veltri	Sunpower	Op-324954749	6/1/2018 3:25 PM
Mark Smith	33 Winston Ave, Hamilton NJ 08123	JohnSmith@yahoo.com	Rick Veltri	LoanPal	Op-392584938	6/1/2018 3:25 PM
Alex Smith	123 Mainstreet, Hamilton NJ 08123	AlexSmith@yahoo.com	Rick Veltri	Sunrun	Op-234054958	6/1/2018 2:25 PM
Ryan Winston	33 Winston Ave, Hamilton NJ 08123	RyanWinston@yahoo.com	Rick Veltri	Sunpower	Op-329574287	6/1/2018 3:25 PM
John Doe	33 Winston Ave, Hamilton NJ 08123	JohnDoe@yahoo.com	Rick Veltri	Sunpower	Op-428563873	6/1/2018 3:25 PM
Mark Smith	33 Winston Ave, Hamilton NJ 08123	JohnSmith@yahoo.com	Rick Veltri	LoanPal	Op-238657827	6/1/2018 3:25 PM
Roger Rabbit	33 Rabbit St, Hamilton NJ 08123	TheRabbit@yahoo.com	Rick Veltri	LoanPal	Op-278459683	6/1/2018 3:25 PM

¹ = Initial Financier

Total Records Found: 9

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Cancelled Customer Details - View Only

[View Opportunity](#)[View Proposal](#)[View Project](#)

Customer Information

Lead ID: L-987435352

First Name	Roger	Last Name	Rabbit
Address	123 Roger Drive Hamilton NJ 08123	Home Type	Detached Single Family Home
Phone	(123) 456-6789	Alternate Phone	(123) 456-6789
Email	RogerRabbit@yahoo.com		

Additional Notes

Created By

Last Modified

Would like Ground Mounts and would like Black Solar ...

Rick Veltri

6/1/2018 2:25 PM

Lead Financier Options (Initial Offering)

Sunrun SunPower LoanPal USPS

Lead Ownership Information

Sales Rep Rick Veltri

Lead Owner Rick Veltri

Lead Stage Created

Cancellation Notes

Created By

Last Modified

Not enough savings after switching to Solar. Wants to save 80% or more!

Rick Veltri

6/18/2018 2:25 PM