

Exclusive Training

How To Use **Sunvoy** For Project Managers



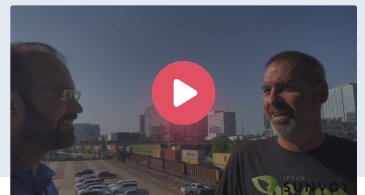
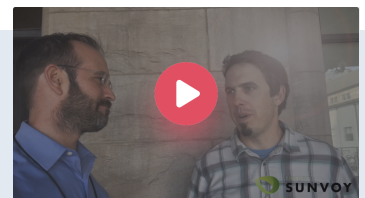
Sunvoy for Project Managers

Sunvoy comes with a lot of functionality and plenty of benefits for all of your team members within your solar company, but in this particular training we want to focus on the most important features for Project Managers:

- **How to search and filter for customer sites**
- What differentiates a site “under construction” and in production mode
- **How to associate different Projects, Systems, Devices and Designs with each other**
- The difference between a Site, Project and Systems and how we use those terms at Sunvoy
- **Learn what the app looks like for your homeowners**
- Understand how the project phases and steps depend on the actions you take in your CRM
- **Discover how to update project properties through your CRM**
- How to troubleshoot false or outdated information
- **How and why to update your profile picture and phone number**
- Upload and manage documents for your customers

Project Managers like you love Sunvoy

[Click here to find out](#) what some of the largest solar installers in the country and worldwide love about Sunvoy.



The Sites List

The Sites List contains all of your customers site's. Both those still "under construction" and those already "producing" power.

You can filter the sites list by various properties or simply search for a particular site by name or address.

It will display various pieces of information related to each Site and also display the Status which can either be "Under Construction" or a red, yellow or green Inverter Status (*we will go into more detail on this further down below*).

It's available as a list and in a map view which you can easily toggle between each other with the icons on the top right corner.



NAVIGATION

- Dashboard
- Sites
- Users
- Settings
- Profile

Log Out

Filters:

Any Type
Any Status
Any City

Search
Street, customer or ref

List
Map

Displaying 0 to 10 of a total 1121 sites

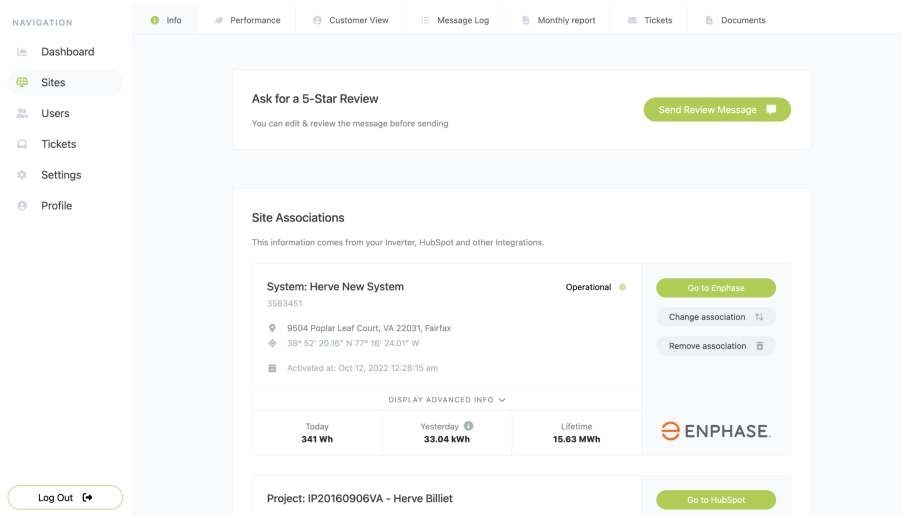
Status	ISP™	Name	Address	City	State	Today	Lifetime
Operational	197%	Mercedes Weber	014 Ismael Port	Arlington	VA	79.55 kWh	55.14 MWh
Operational	194%	Tiffany Nienow	437 Braun Centers	Arlington	VA	30.9 kWh	21.37 MWh
Operational	191%	Brian Wolf Jr.	3520 Shields Ext...	Fairfax	VA	46.12 kWh	10.3 MWh
Operational	186%	Yvette Hermann IV	715 Klan Shores	Arlington	VA	38.67 kWh	17.01 MWh
Operational	180%	Misty Schneider	685 Tia Ferry	Falls Church	VA	58.82 kWh	22.54 MWh
Operational	175%	Jacqueline Carroll	267 Schuyler Ca...	Gaithersburg	MD	38.52 kWh	23.76 MWh
Operational	173%	Kristy Blanda	859 Kris Pines	Arlington	VA	58.38 kWh	11.64 MWh
Operational	169%	Salvador Hilpert	705 Luisa Fords	Fairfax	VA	52.59 kWh	17.1 MWh
Operational	167%	Alice Medhurst	70477 Oswaldo F...	Oakton	VA	64.36 kWh	11.56 MWh
Operational	166%	Jaime Wolf	5691 Funk Ways	Arlington	VA	24.84 kWh	12.48 MWh

Sites per page 10
Page 1 of 113
1 2 3 4 5 ... Last

A single Site

If you click on a Site you will go to the single site page. This contains all information and settings related to a single site.

A site groups together various entities from your different Integrations.



You can find all of the entities associated with a particular site within the "Site Associations" Box within the "Info" Tab.

The two most important entities usually grouped together are:

- **Projects:** This is project related information coming from your CRM, such as the customer name, address, number of panels or kW size
- **Systems:** This is a production system coming from one of your Inverter Portals and that provides live energy data for a given period

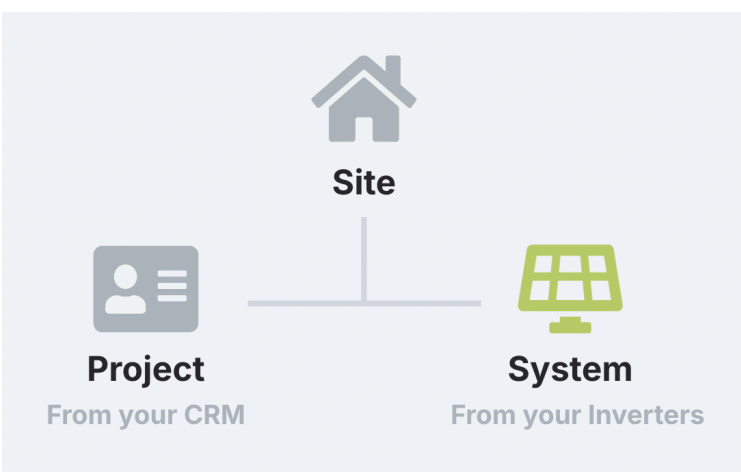
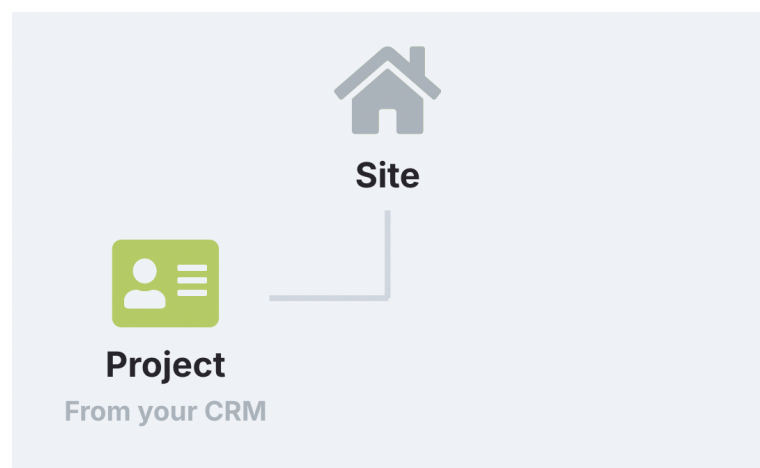
But a Site can also contain more entities like a "Device" (like an external battery from a different hardware manufacturer) or a "Design" (coming from Aurora or Solargraf).

Depending on which entities are associated with a Site it's status within the Site List will change:



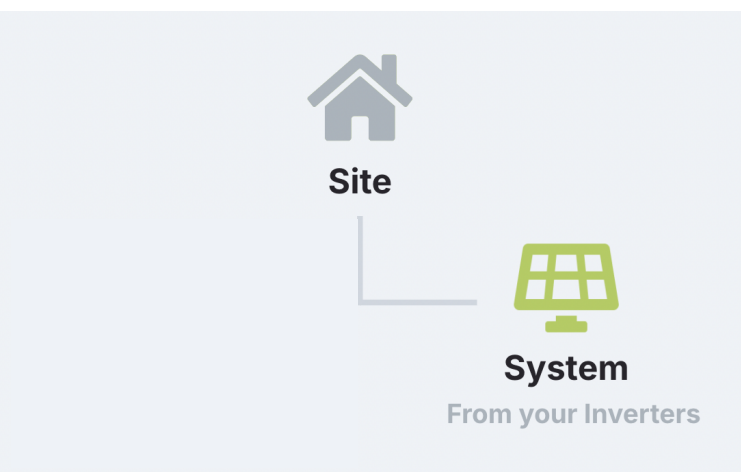
“Under Construction” Sites

Sites under construction are those sites that currently **only have a “Project” associated with it**. This could be because either there was no system found yet within your Inverter Portal (*because the project is still in the very early stages*) or because the system could not be associated automatically with the project from your CRM.



“Production” Sites

Sites with an Inverter Status **will have both a “Project” and “System” from one of your Inverter Portals associated with it**. Then the Status will simply be set to the Status coming from the Inverter Portal which is roughly grouped into “green”, “yellow” and “red” status codes. You can consult the documentation for more information for each inverter.

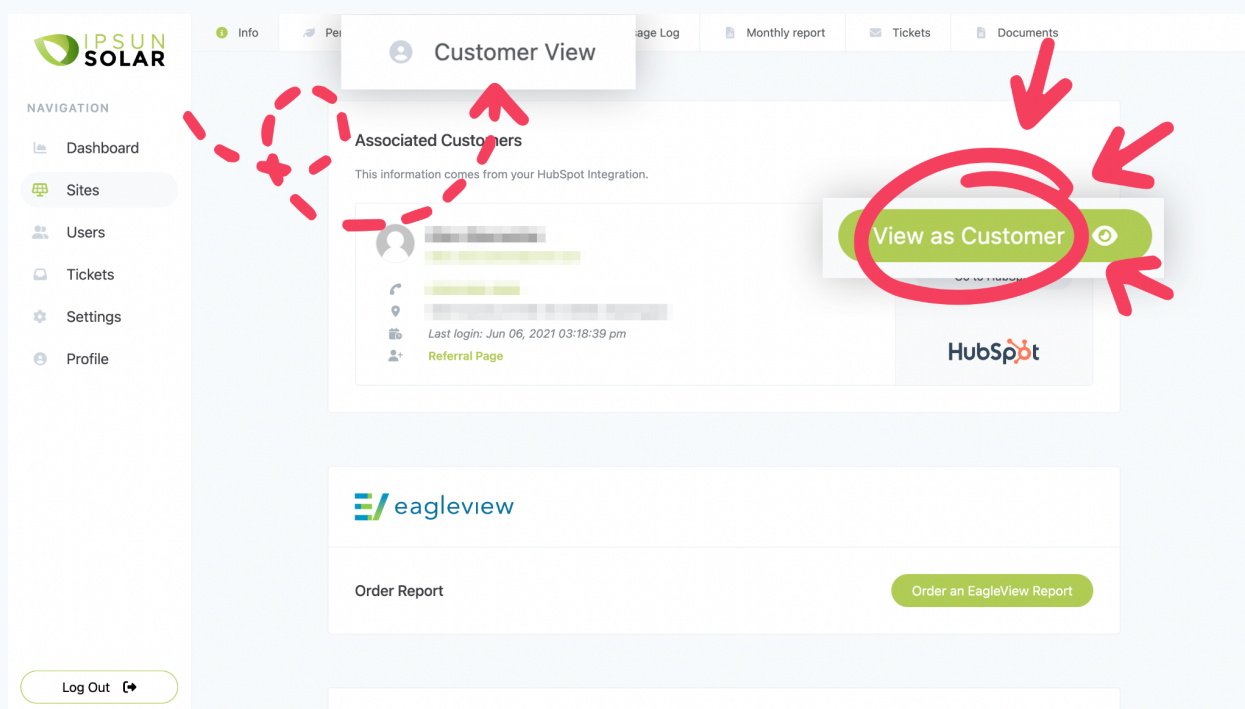


Occasionally you might find an *orphaned* system. These are sites that only have a “System” associated with them, but Sunvoy could not find any related “Project” within your CRM.

This is often the case for systems that have been installed very early on, or systems that you took over for O&M work without creating an actual project in your CRM for.

Check what the app looks like for customers

When you click on an individual Site within the Site List or Map View you can display what the app looks like to your homeowners. There are two ways to do this, either click on the "Customer View" tab in the top navigation bar, or scroll down to the "Associated Customers" Section and click on "View as Customer".

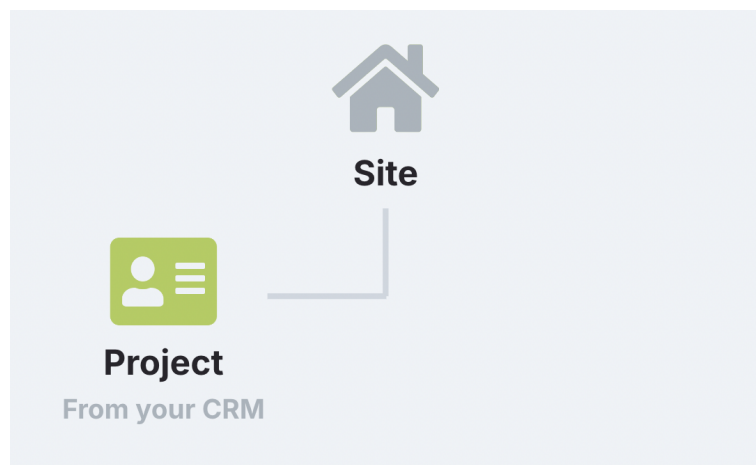


If you click on "View as customer" you will see the app exactly as how the customer would see it. To go back to your own view, click on "Log out" and it will take you back to your own account.

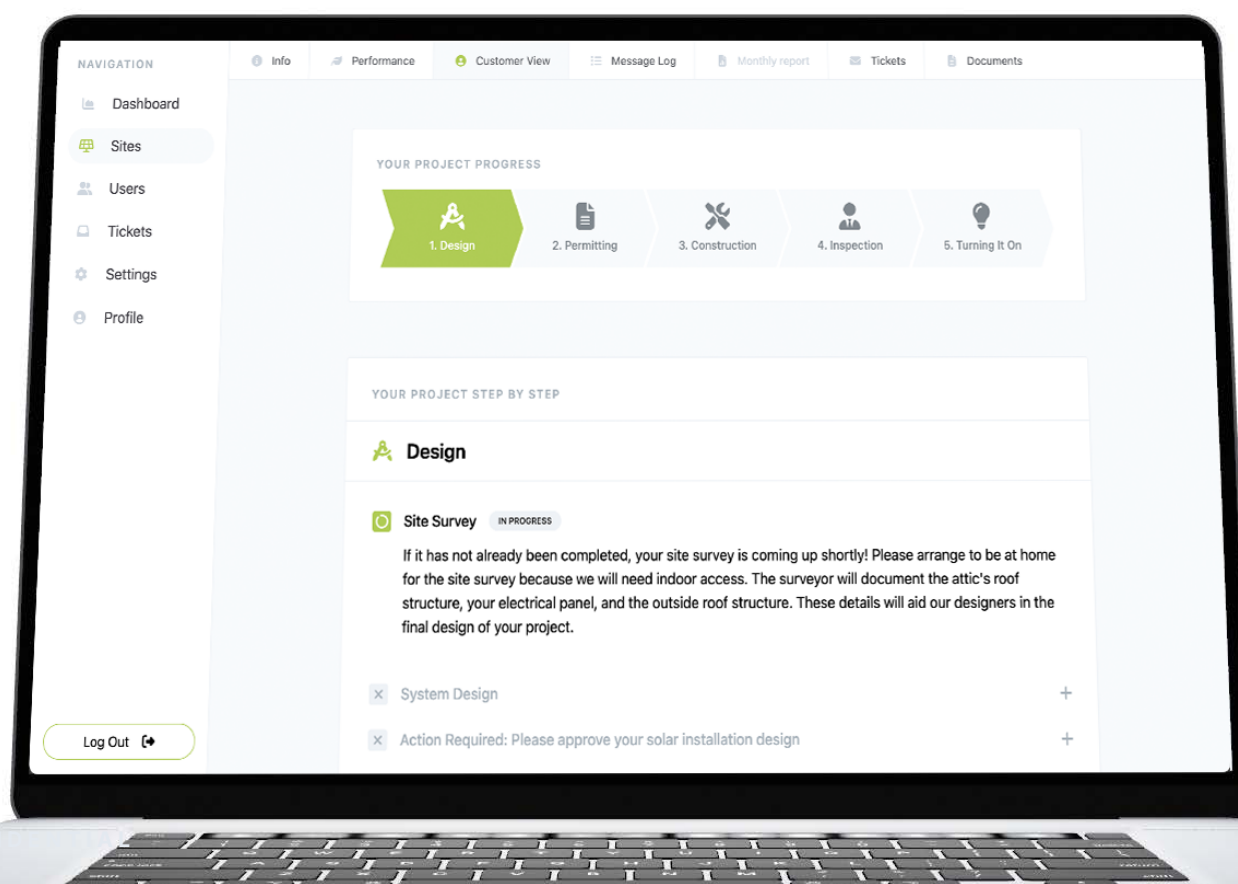
Construction View

A customer that currently is still under construction and thus only has a "Project" associated with his Site will see the **Project Phases and Steps** an administrator user has defined under Settings » Projects » Phases.

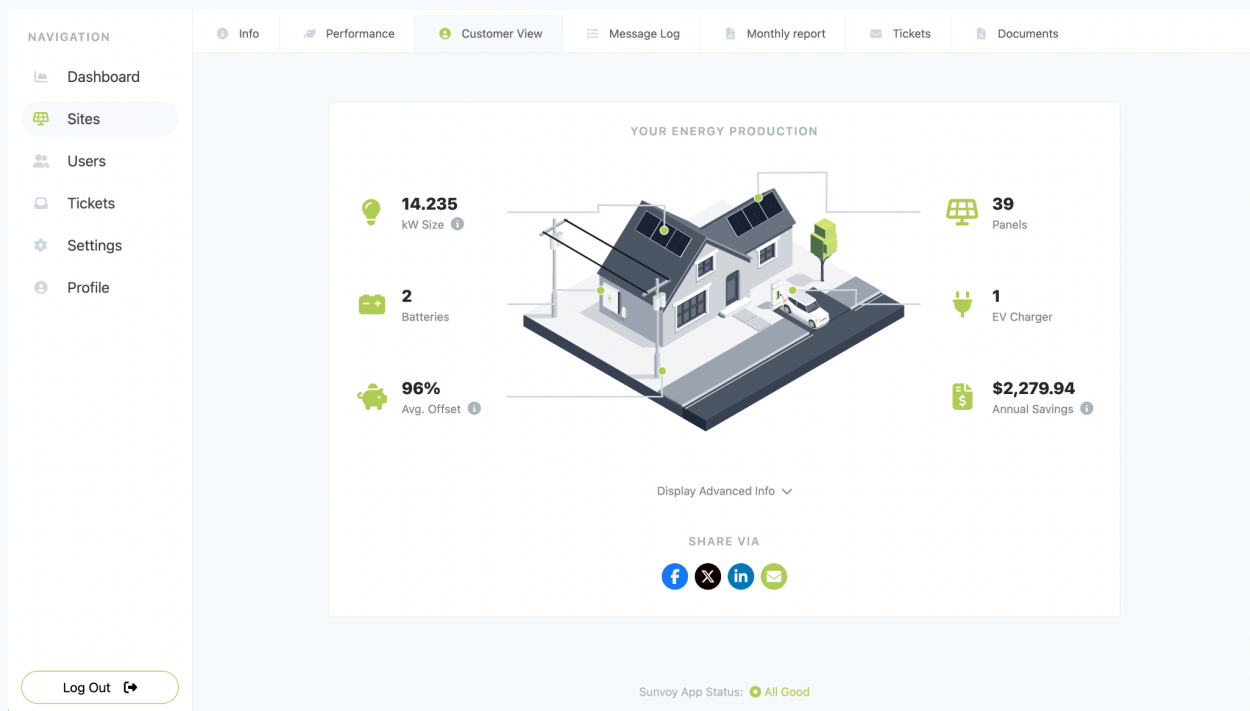
The Steps will automatically move along as the Project is updated within your CRM. The logic for this has also been defined by an administrator user under Settings » CRM » Phases. This is as well the place that defines which of your CRM Projects actually sync with Sunvoy, for example to prevent Projects that have not actually been sold yet from syncing.



Customers will receive access to Sunvoy as soon as a Project that fits the criteria has been created within your CRM.

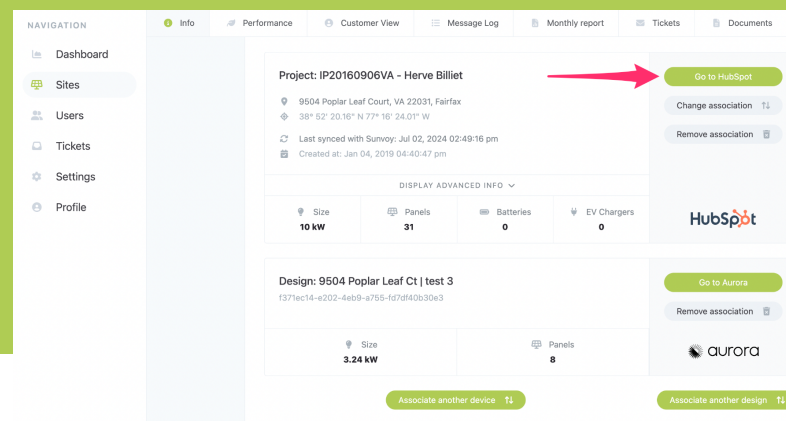


The Customer View also contains a “System Info” Widget. This contains project related information such as the number of panels installed or the kW size of the system that map to properties from your CRM. These have also been defined by an administrator user under Settings » CRM » Fields.



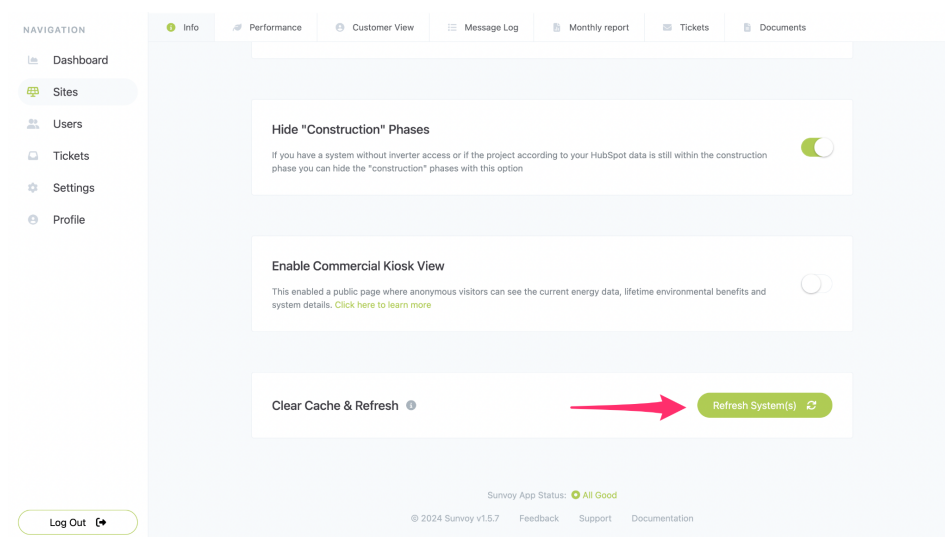
How to update a Project

Sunvoy works mostly in the background without you or your team having to worry about updating it. Instead you just update data within your CRM and those updates will automatically propagate back to Sunvoy. Within the Site Associations Area you will find a button that takes you conveniently back to the Project



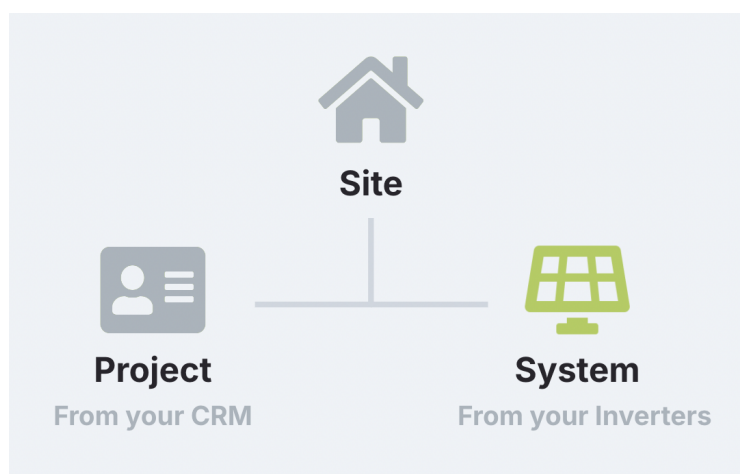
Refresh a Project

Project updates usually sync back from your CRM within a few seconds, but for some CRM Integrations it could also only be every hour. To manually force a refresh you can scroll down on the Site "Info" Tab to the "Clear Cache & Refresh" Section and click the button to force a manual refresh instead.



Hide Construction Steps

When a Project has been associated with a production System sometimes it still displays the "Project Phases & Steps" instead of the live energy production. For these cases you can hide the project construction steps and force to display the production data instead by clicking the checkbox on the Site "Info" Page:



Hide "Construction" Phases

If you have a system without inverter access or if the project according to your HubSpot data is still within the construction phase you can hide the "construction" phases with this option

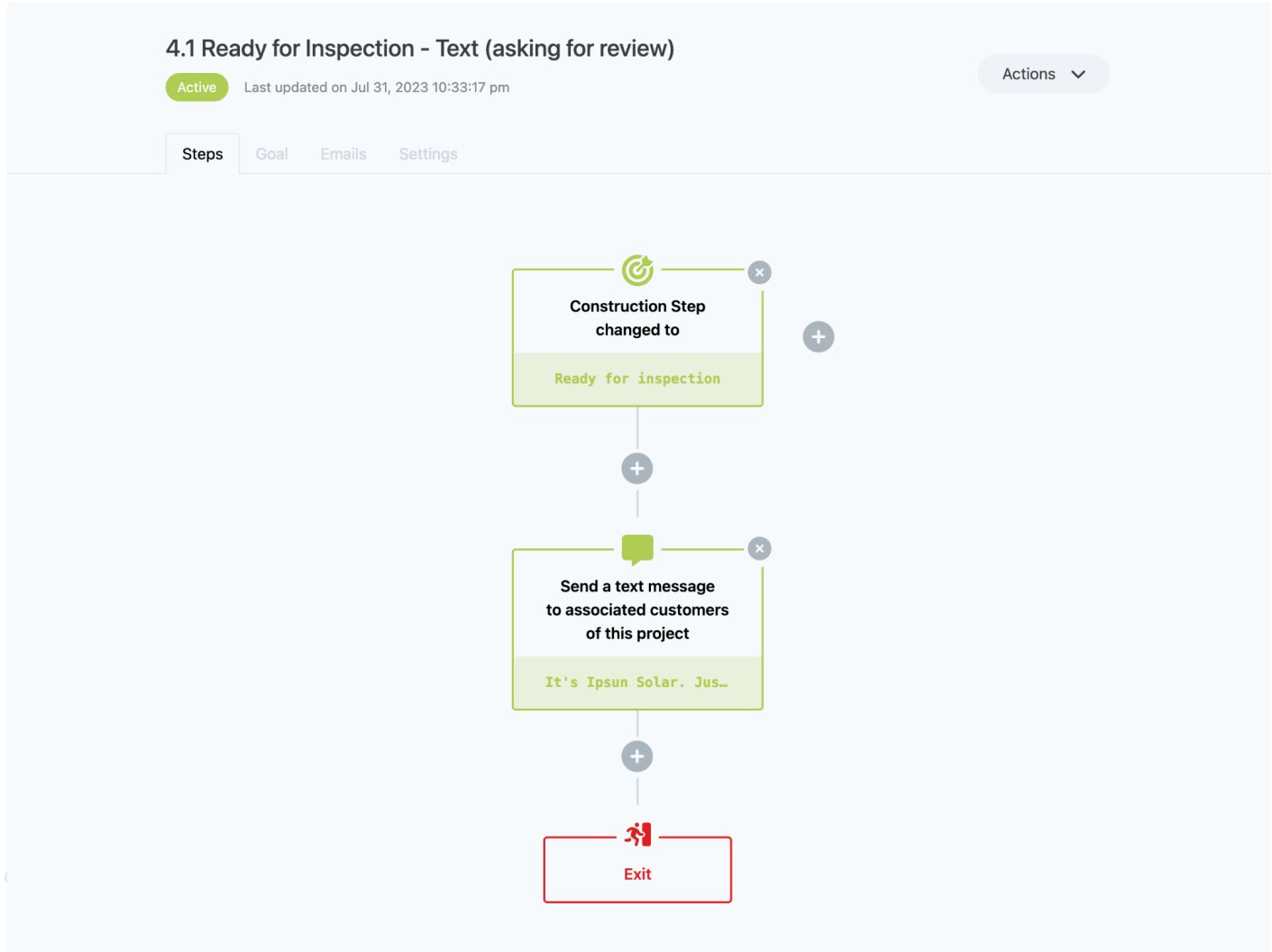


Automate Customer Communications

Administrators can set up powerful automations within Settings » Automations. These can be used to automatically send project updates to your customers as their project moves from one construction step to the next.

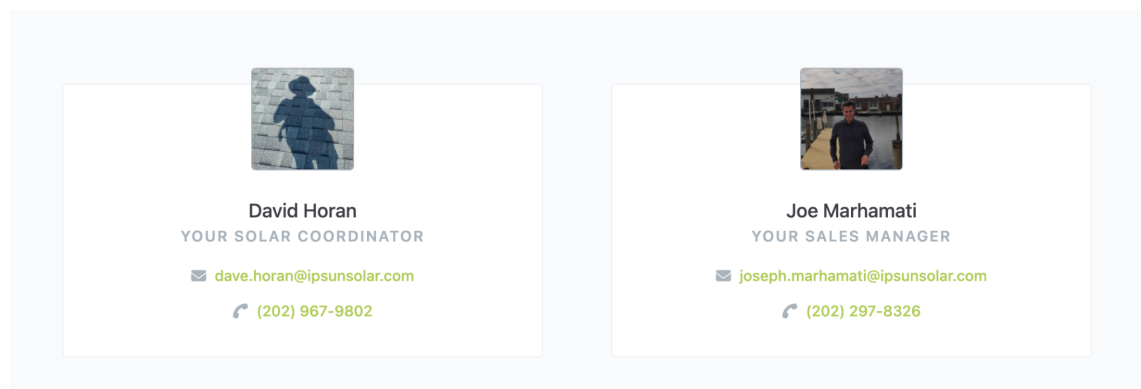
We also recommend setting up an automation to ask for a 5-star review after the installation has been completed, and also ask for a referral a couple of days after the system has been successfully turned on.

This frees up your time to call customers that actually need attention and also ensures that customers are always up to date on their project construction status even if you are out on vacation.



Project Managers & Sales Managers

The customer view also contains a section related to Project Managers and Sales Managers. This information is once again pulled from the Project within your CRM, but most CRMs do not provide profile pictures and phone numbers.



Therefore it's important that if you have a customer facing role you go to your "Profile" and upload a profile picture and make sure the phone number is set up correctly.

ACCOUNT

Information

First Name

Last Name

Email

Phone

Profile Picture
 You can change your profile picture by creating a free account on [Gravatar](#) and associating it with your account email [jascha@sunvoy.com](#) or [click here to upload one.](#)

[Edit Info](#)



Step 1:
Go to "Profile"



Step 2:
Upload a Profile Picture

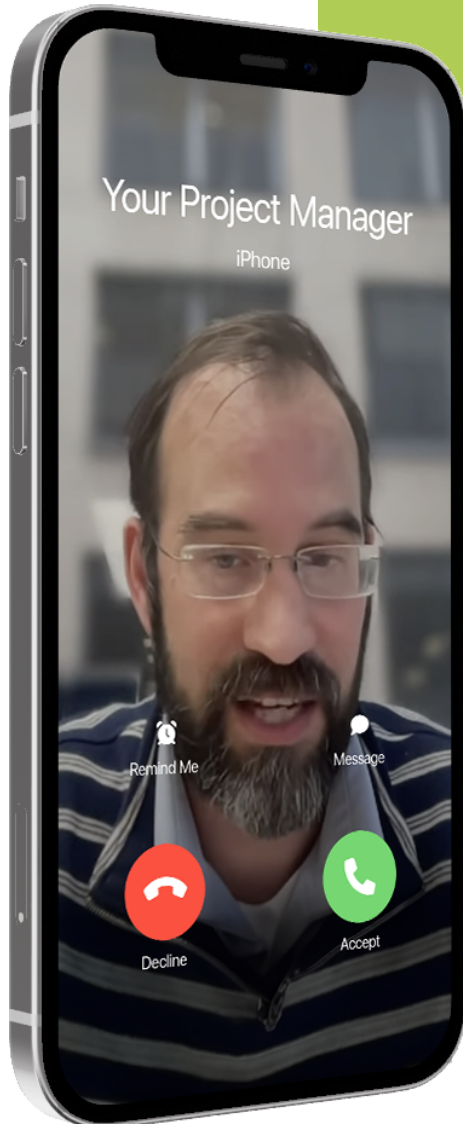


Step 3:
Verify your Phone is correct

Manage Documents

If you go to a single Site you will also have access to the “Document” Section.

Within this Section you can upload any relevant documents for the customer, such as invoices, contracts, warranties or service manuals so that the homeowner can easily reference it in the future and doesn’t need to reach out to you again.



Permission to Operate Calls

What has worked well for a lot of Sunvoy customers to make sure documents are properly uploaded for each homeowner is introducing or modifying the “Permission to Operate” call.

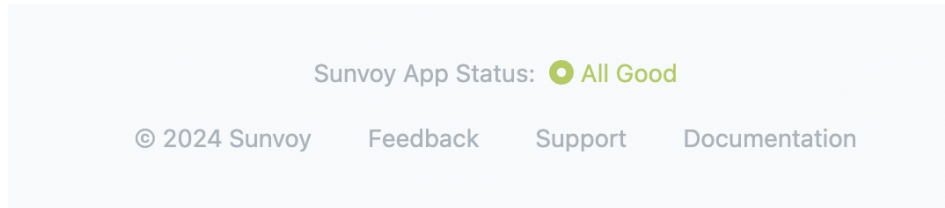
Once a system has received permission to be turned on, the Project Manager sets up a call with the homeowner to turn on the system. Then he walks them through the app, making sure they have installed it on their smartphone, received access and know where to find what.

Before that call the Project Manager can then make sure that any relevant documents have been properly uploaded into the app and that all project related information such as number of panels and kW size is displayed correctly.

This is as well the perfect opportunity to ask for a 5-Star Review and Referral.

Frequently Asked Questions

After logging into your app you can scroll down to the Footer and find additional resources:



Feedback & Feature Request

Something is missing or you got a great idea for a new feature in Sunvoy? Then just click on "Feedback" within the Footer Area to get access to a public forum that all installers that use Sunvoy worldwide use to pitch in. You can see if another installer already had the same idea, give your vote on existing ideas or submit your own.

Documentation

The first place to reach out to if you have a question or would like to learn more about a particular feature is the documentation. It has two separate sections for administrator and employee users, and also contains a section with frequently asked questions on how to troubleshoot issues. If you still need help please use:

Help & Support

Did you find a bug, is something not working as expected or do you simply have a question about a particular feature that was not answered within the documentation? Then click on "Support" and you will be directly in touch with our customer success team that is there to help you at every step of your journey with Sunvoy. You can as well write at anytime to support@sunvoy.com

Additional Resources

If you would like to dive even deeper into Sunvoy make sure to also check out our [YouTube Channel](#), the documentation section mentioned above and additional trainings offered for:

- [Sales & Marketing](#)
- [O&M Teams](#)
- [General Managers & Company Owners](#)



Time to take ACTION

At this point you should have all of the necessary information and already have set up your own mobile App through Sunvoy. **Now it's time to take action and apply the knowledge to make sure your company gets the most out of Sunvoy.** Just follow this Checklist:

Checklist

- ☒ ~~Setup your Sunvoy App~~
- ☒ ~~Read through this Training~~
- ☐ Go checkout the /sites list and search and filter for a couple of your projects
- ☐ Find a site that is still under construction and displays the phases & steps
- ☐ Click on “View as customer” and check what the app looks like for them
- ☐ Return to your own account by clicking on “Logout” while being logged in as a customer
- ☐ Find a site that is already live and checkout the energy production
- ☐ Locate the “Refresh System” Button and manually refresh a project or system
- ☐ Change a mapped property in your CRM (for example the number of panels) and see how it updates within the app
- ☐ Watch the Video on the difference between a Site, System and Project
- ☐ Watch the Video on how your homeowners get access to the app
- ☐ Watch the Video on how to reset the password for a homeowner
- ☐ Checkout other videos on the Sunvoy YouTube Channel and subscribe for updates