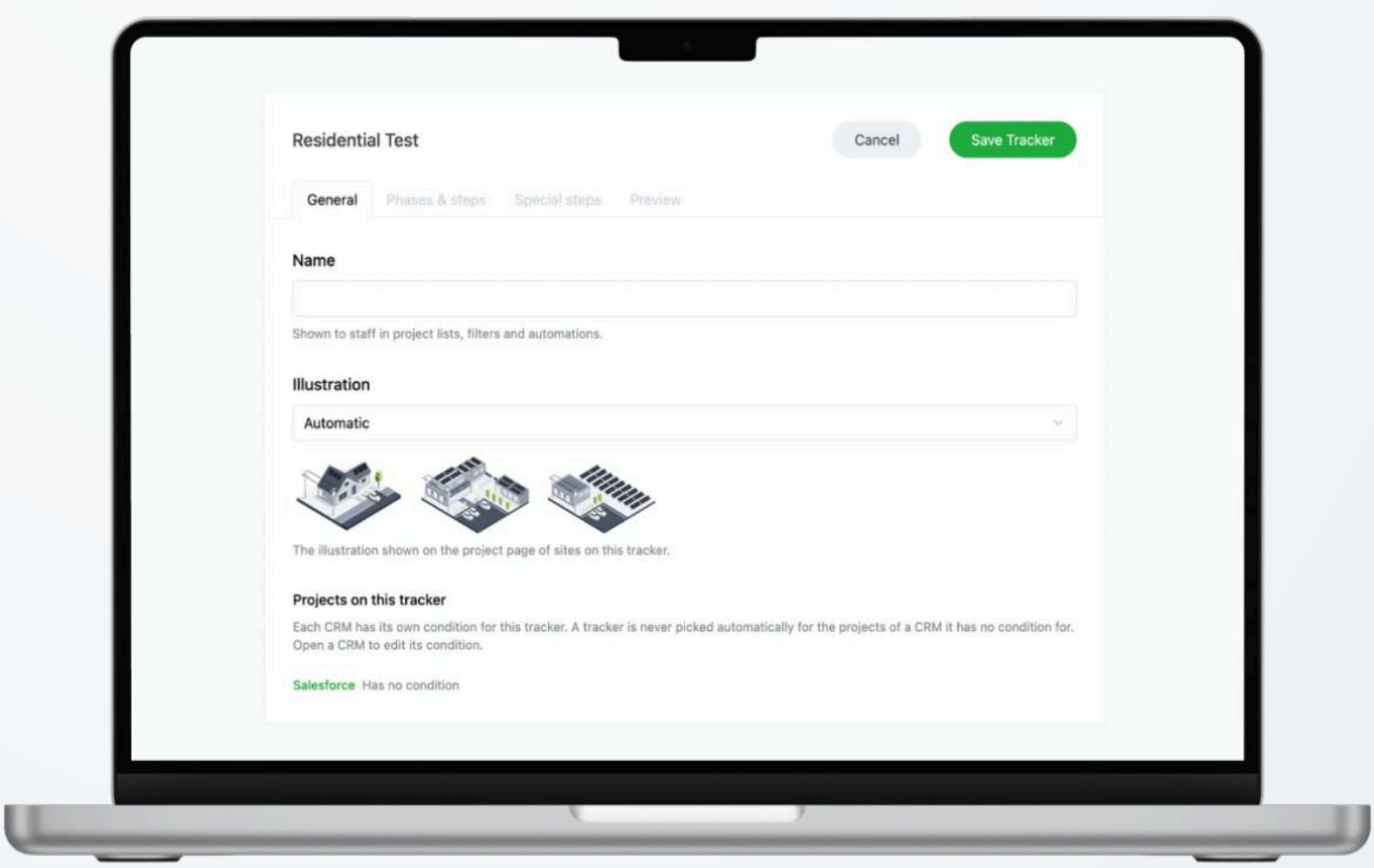
SUNVOY

INTRODUCING MULTIPLE PROJECT TRACKERS

Different projects. Different steps. The right tracker for each.

Give every type of project its own customer-facing journey inside your branded Sunvoy portal.



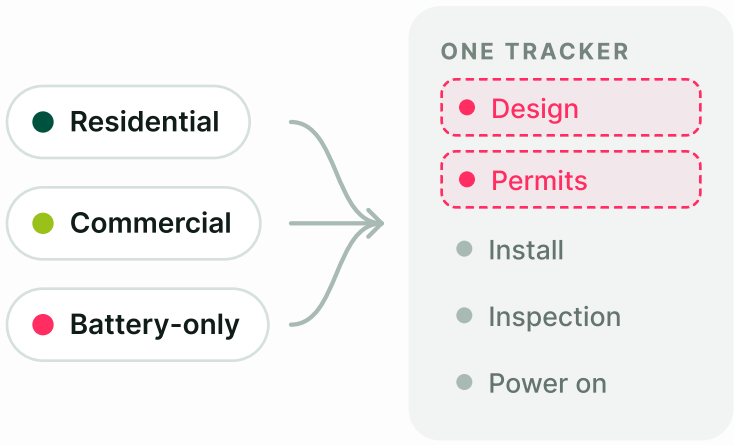
01 / WHAT'S NEW

Stop forcing every project through the same steps.

Different jobs need different journeys. Now each type of project can have its own tracker.

BEFORE

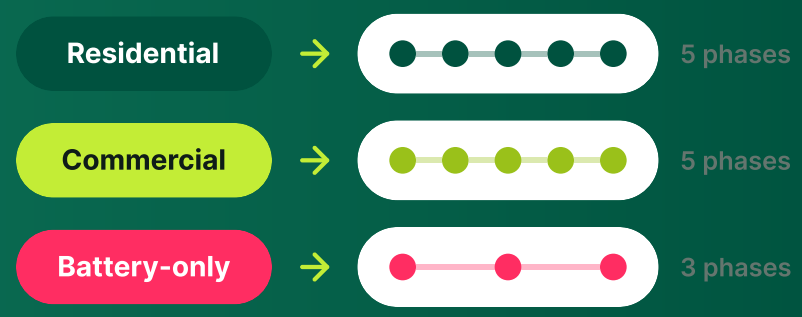
One tracker for every job



Steps that didn't apply to every job needed workarounds — like formulas or Liquid templates in step names.

NOW

A tracker for each type



Each tracker has its own phases, steps and customer-facing explanations. Phase counts shown are examples.

What multiple trackers make possible

Build around the way you work effectively

Start with a blank tracker, the default structure, or a copy of an existing tracker — then adapt it.

Show customers the steps that matter

Phases and explanations tailored to their type of installation, so customers know where things stand and what comes next.

Connect projects to the right tracker

CRM-based rules match projects to a tracker — for example by project type or pipeline, depending on the data in your CRM.

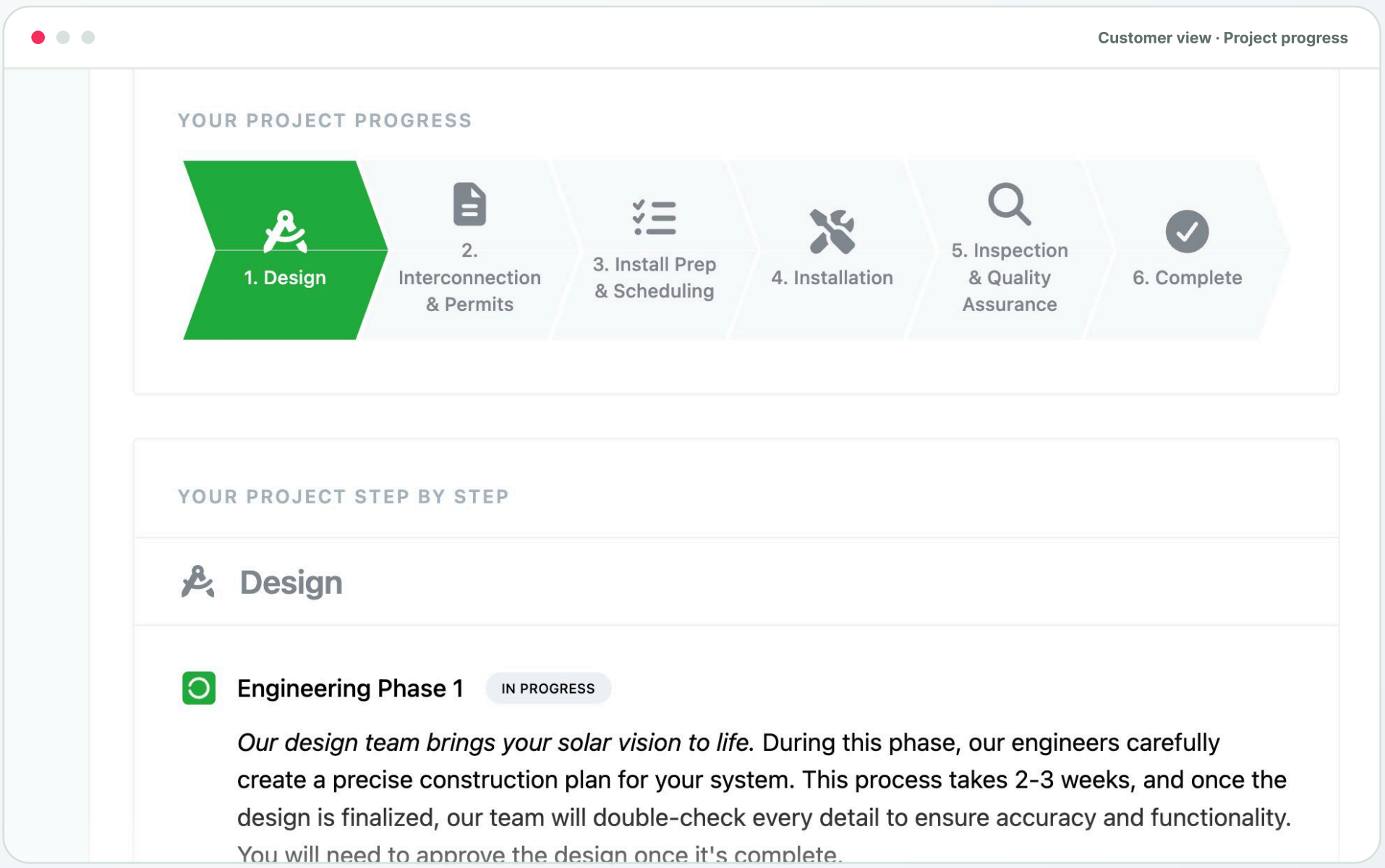
Keep every workflow in one portal

Manage distinct journeys in the same branded portal, with tracker-based views and filters for your team.

02 / WHAT CUSTOMERS SEE

Every customer sees their own journey.

Same branded portal.
Phases, steps and explanations that match the job they're getting.



Only the steps that apply

No more one-size-fits-all installation process.

Explanations in your words

Each step can tell customers what happens next.

Your brand on every journey

Every tracker lives in the same customer portal.

03 / HOW ASSIGNMENT WORKS

Your CRM decides. First match wins.

Give each tracker conditions based on your CRM data. Sunvoy checks them from top to bottom and assigns the first tracker that matches.

EXAMPLE: THREE PROJECTS, ONE RULE ORDER

INCOMING PROJECT	1 · BATTERY Type = Battery	2 · COMMERCIAL Pipeline = Commercial	3 · DEFAULT No conditions	ASSIGNED TRACKER
Battery retrofit Project type: Battery	✓ Match	—	—	→ Battery tracker
Office rooftop Pipeline: Commercial	×	✓ Match	—	→ Commercial tracker
Home solar install Project type: Solar	×	×	✓ Catches it	→ Default tracker

— means the project already matched an earlier tracker, so later rules don't matter.

✓ First match wins ✓ Default catches the rest ✓ One tracker per project

SET IT UP IN THREE STEPS

01 **Create a tracker** — Blank, default structure or a copy

02 **Set CRM rules** — Choose which projects use it

03 **Map the steps** — Link progress to your CRM data

Tip: duplicating a tracker also copies its assignment rules, so review them before you use it.

04 / ALREADY USING SUNVOY?

Your current setup carries over.

Your existing phases and steps become a default tracker. Keep using that workflow as it is, and add more trackers when you need them.

WHAT CHANGES

Where your team will notice trackers

- ✓ **Default tracker**
  Existing phases and steps carry over automatically.
- ✓ **Project Filters screen**
  In your CRM settings, project add/remove conditions now have their own screen.
- ✓ **Steps per tracker**
  Step mapping is configured for each tracker.
- ✓ **Project list & site info**
  See each project's tracker and current phase, and filter by tracker.
- ✓ **Kanban**
  Choose which tracker to view when you have more than one.
- ✓ **Automations & broadcasts**
  Use tracker-specific steps and filter broadcasts by tracker.

QUICK ANSWERS

Questions your team will ask

Can one project use two trackers?

No. Each project uses one tracker at a time.

What if a project matches no rule?

It uses the default tracker — the last one in your list.

Do we need to rebuild our workflow?

No. Your current setup becomes the default tracker.

Can we start from an existing tracker?

Yes. Duplicating also copies its rules, so review them first.

Make your project journeys fit your business.

Already a Sunvoy customer?

Contact the Sunvoy team for help setting up multiple project trackers.

Talk to your Sunvoy team →

Exploring Sunvoy?

Book a demo to see how project trackers can support your installation workflows.

Book a 5-min demo →