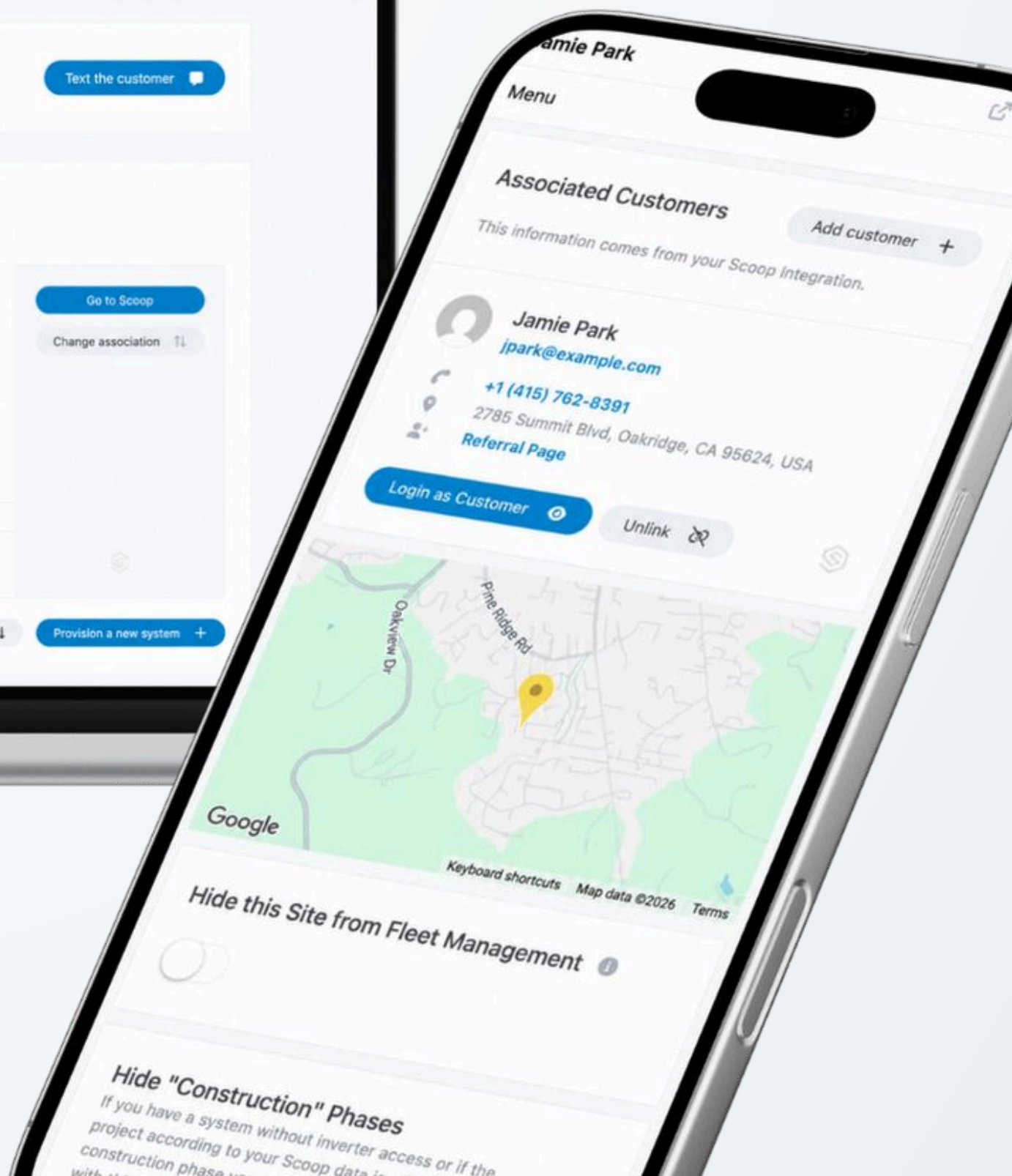
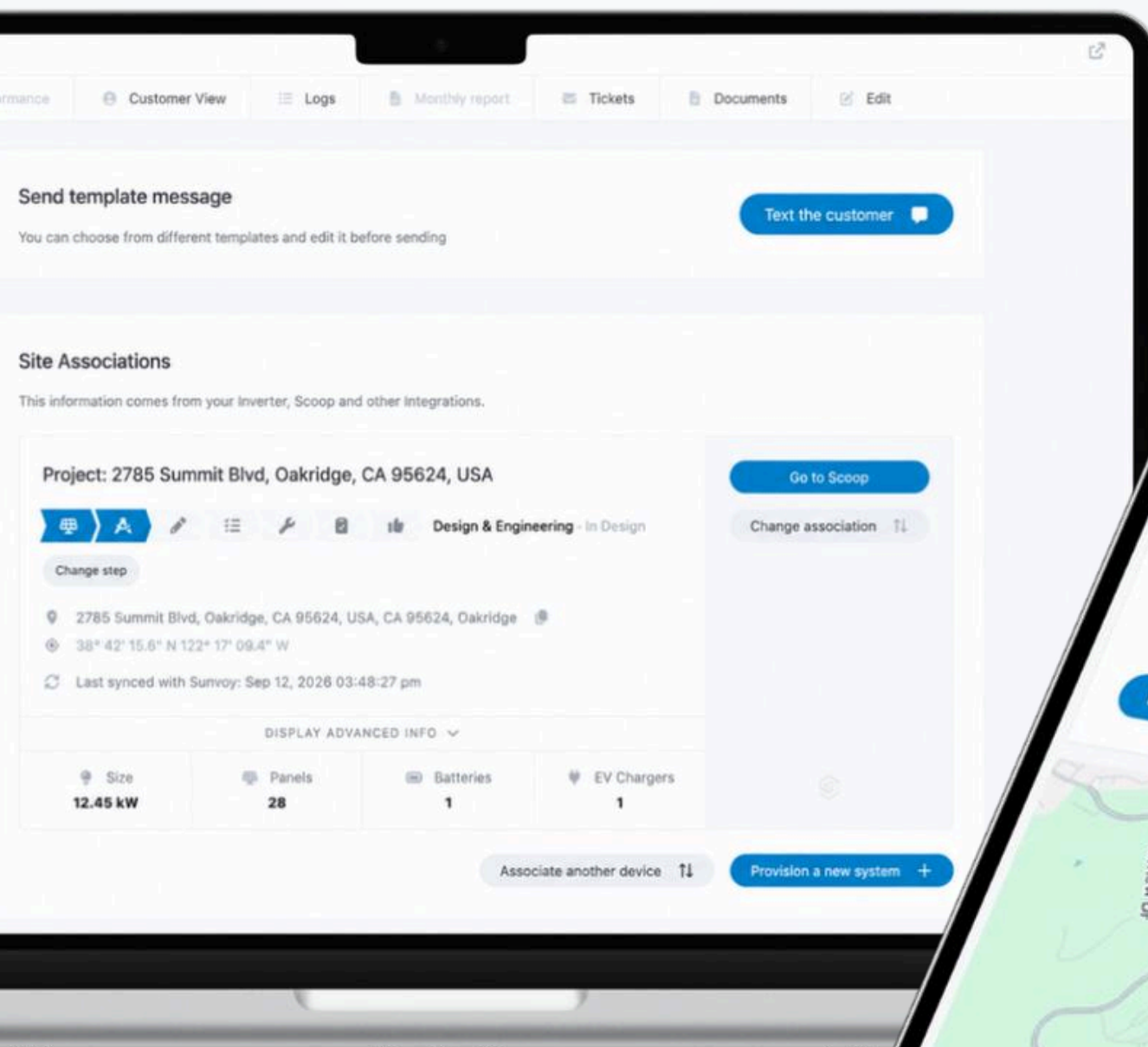




BUILT FOR SOLAR INSTALLERS

Outgrown the spreadsheet? Meet Sunvoy CRM.



Sunvoy has been rated 5/5 stars by
hundreds of solar installers like you!

BUILT FOR SOLAR INSTALLERS

Your projects. Your customers. Now managed in Sunvoy.

Create projects and customers, correct project details, and move deals forward in the same place your team already works.

Spreadsheets and project boards leave the customer, the project and the system in different places. Sunvoy CRM gives installers a native way to keep them together, so details are not copied by hand and no one has to check inboxes to answer “Is everything okay?” Three connected improvements make it easier to create records, maintain accurate details, and keep work moving.



Preview records

Open a site or user in a side panel, then return to the view you were working in.



Edit the details

Adjust supported fields, review who changed them and when, and revert overrides.



Manage natively

Create projects and customers, add custom fields, and manage deals from Kanban.

WITH YOUR EXISTING CRM

Keep your connection. Fine-tune your data.

Use Site Editing to correct supported information in Sunvoy while keeping your connected CRM.

WITH SUNVOY CRM

Create the records. Keep work in one place.

Add projects and customers directly in Sunvoy. Site Editing must be enabled first.

Inside this guide

02–03 / Get started

Enable features
Create and link records

04–05 / Keep data useful

Understand overrides
Define custom fields

06–08 / Run the workflow

Use Kanban
Go beyond the deal
Launch checklist & FAQs

Covers the current launch features. Suggested team practices are distinguished from product capabilities.

01 / CHOOSE YOUR SETUP

Start with the right features enabled.

Site Editing and Sunvoy CRM are separate controls. Understanding the difference helps your team request the setup it actually needs.

CAPABILITY	SITE EDITING	SITE EDITING + CRM
Edit supported site / user details	Yes	Yes
Review and revert field overrides	Yes	Yes
Link or unlink existing customers	Yes	Yes
Create new projects in Sunvoy	No	Yes
Create new customers	No	Yes
Define custom project fields	Requires CRM	Yes

Get ready in three steps



Confirm activation

Sunvoy turns these on for your account. Ask Sunvoy to confirm your setup.



Enable Site Editing

Enable editing before CRM. Employees and administrators can then use the Edit tab.



Check your access

Look for Edit on a site or user. With CRM, also look for Add Project and Add Customer.

Preview is a separate improvement.

Clicking a site or user opens its side preview without reloading the full page.

02 / CREATE THE RECORDS

Start with a project.

Connect the right customer.

A project holds the job information. A customer record represents the person linked to that project. Sunvoy CRM lets you create both directly.

Add the project

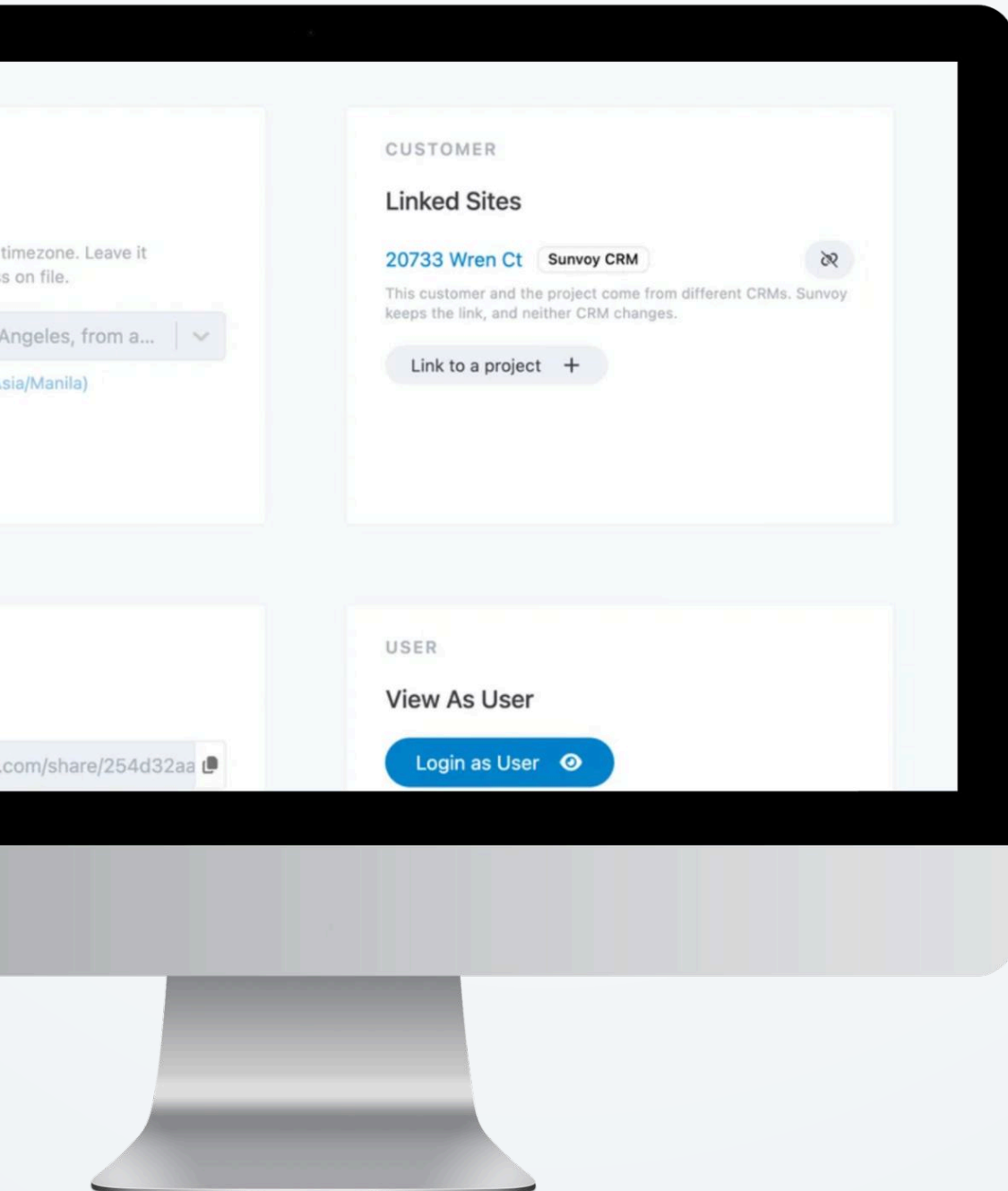
Select **Add Project** and enter the job details. Defined custom fields appear here too.

Connect the customer

Link an existing customer or create a new one with Sunvoy CRM. Check existing records first.

Review the record

Open the new site, confirm the details and customer link, and use **Edit** to make corrections.



Prefer to start with the customer?

In user management, Sunvoy CRM adds **Add Customer** alongside the employee and administrator options.

Create the customer, then link an existing project or create a new one.

03 / KEEP PROJECT DATA ACCURATE

Fix the detail.

Keep the context.

A missing EV charger or incorrect panel count should be straightforward to correct. Site Editing lets your team adjust supported values inside Sunvoy.

Use **Edit** to adjust supported project details, including size and steps, plus user, design and device information. Review the record after making a change.

ACTION	WHAT HAPPENS IN SUNVOY
Change a value	The adjusted value is visible in Sunvoy, with the editor, timestamp and original value.
Review an override	Inspect the field details for context. The override count tells you how many fields have been overridden.
Revert a change	Use the revert option when the local correction should no longer apply. Review the value shown afterward.
Disable Site Editing	The Edit tab is hidden. Saved overrides remain; switching editing off does not undo them.

BEFORE

0 EV chargers

AFTER EDITING

2 EV chargers

Correct the displayed value directly in Sunvoy, then review the result. The original value and change details remain available for context.

A Sunvoy override is a local adjustment

Do not assume it updates your external CRM. Agree on where permanent corrections belong and confirm integration-specific sync behavior with Sunvoy.

04 / CAPTURE WHAT MATTERS

Make the record fit your workflow.

With Sunvoy CRM enabled, you can define custom fields with different data types. Those fields appear when your team adds or edits a project.

Use standard fields where they fit. Add custom fields for recurring project details that need a consistent place, starting with a small, clearly defined set.

EXAMPLE FIELD	WHY IT MATTERS	EXAMPLE VALUE
Permit reference	A shared reference for follow-up.	PV-2026-0142
Utility application ID	Keep the utility reference with the job.	INT-08351
HOA approval needed	Identify an approval requirement.	Yes
Target installation date	A planning reference to review.	October 15, 2026
Site access instructions	Practical context for the project team.	Use the side gate

Suggested fields, not defaults. Choose from the data types available in your account.



Give it one purpose

Use a clear name and agree on what belongs in the field. Avoid duplicate information.



Choose the right type

Match an available data type to the information. Use consistent formats for IDs and text.



Test both workflows

Confirm the field appears when adding and editing a project. Try a representative entry.

Keep the field set useful.

Assign someone to maintain important details and review your field set after the first few projects. These are team practices, not automatic product rules.

05 / KEEP DEALS MOVING

Review the pipeline.

Act on the record.

Follow every project from sale to installation and beyond. Move deals with drag-and-drop, spot what has stalled, and edit from the board.

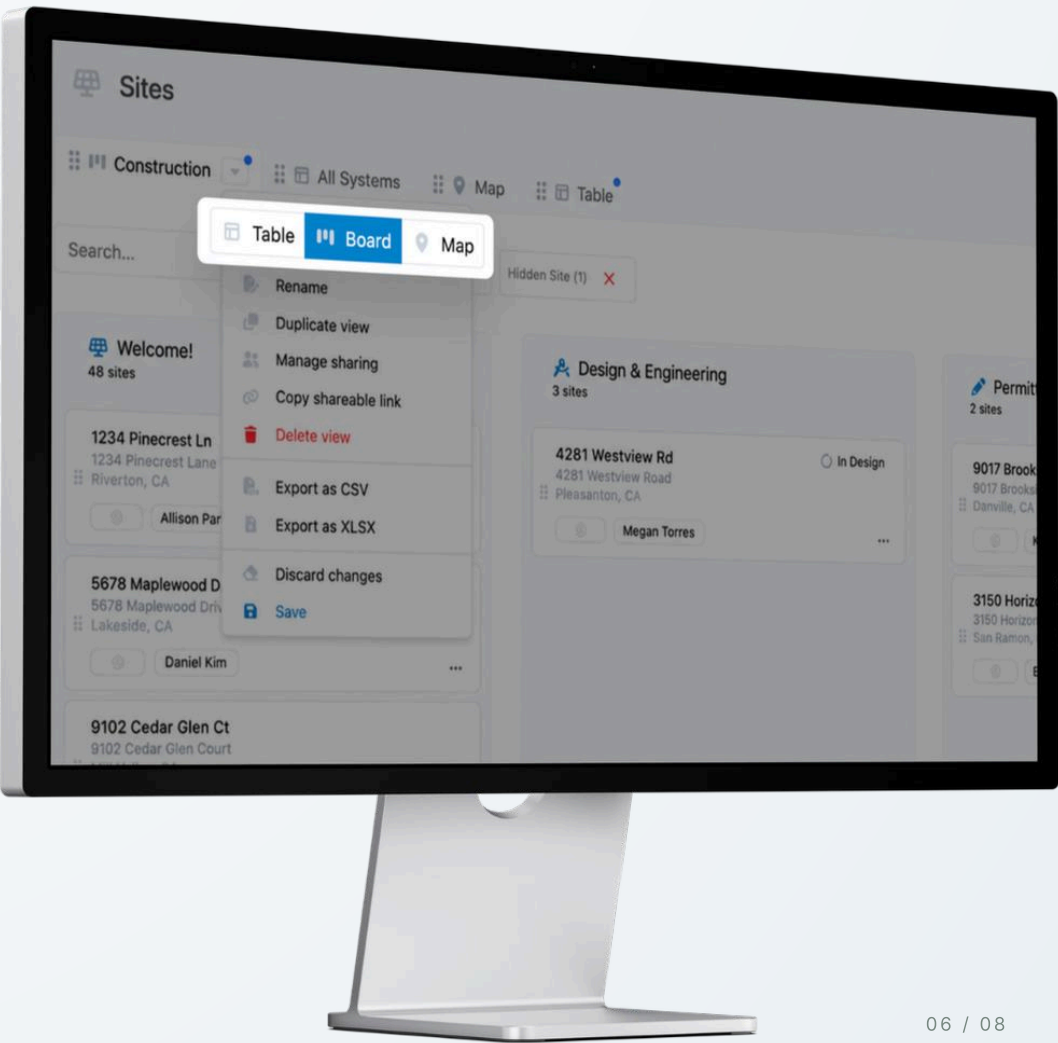
A simple rhythm for daily review

REVIEW	TAKE ACTION
Spot what has stalled	Look for projects that have gone quiet, then open the record for context. Site and user previews let you return to your previous view.
Correct the details	Use the available edit controls. Review override details when a field has been changed.
Move the deal forward	Drag and drop the deal in Kanban. Agree on what must be complete before a stage changes.

Make movement mean something.

Before advancing a deal, verify the customer link, project data and handoff details.

Assign the next action during your team review. Stage completion rules are a suggested practice.



06 / GO BEYOND THE DEAL

Connect it. Share it. Keep it going.

Bring your tools and your team into Sunvoy CRM, and keep looking after the customer once the panels go live.

Bring your tools and team together.



Connect your tools

Link your solar hardware and industry software so your details start from one source.



Invite your team

Add sales, operations, service and other stakeholders so everyone follows the same project.



Work from one record

Everyone sees the same customer, project and system details, with no separate versions.

Keep the customer after the panels go live.

Sunvoy does not stop when the install is complete. Your branded customer portal keeps everything the homeowner needs in one place.



Stay informed

Project updates and documents stay available to the homeowner in the portal.



See the system

Energy monitoring shows how the system is performing, so issues are easy to spot.



Keep the relationship

Service, reviews and referrals stay connected to the customer you have built.

Invite in stages.

Start with the people who work on a project every day, then add other stakeholders as your workflow settles. This is a suggested practice, not a product rule.

07 / PUT IT INTO PRACTICE

Start with one workflow.

Build confidence as you go.

Begin with a representative project, confirm the records and fields, and let the people doing the work test the day-to-day flow.

LAUNCH CHECKLIST

Your first project, from end to end.

✓ Activation

Site Editing is enabled; enable CRM for native project and customer creation.

✓ Project + customer

Create a project, connect the correct customer and verify both records.

✓ Data corrections

Test an edit, inspect its original value and change details, then try reverting it.

✓ Custom fields

Confirm your initial fields appear when adding and editing projects.

✓ Daily workflow

Test preview, board editing and Kanban movement with your team.

QUICK ANSWERS

Questions your team will ask

Do we need to replace our CRM?

No. Use Site Editing for local corrections. Enable Sunvoy CRM for native project and customer creation.

Who can edit?

Employees and administrators can edit when enabled. Sunvoy handles activation for your account.

Does switching editing off reset data?

No. Saved overrides remain. Use the revert control to remove an override.

Does this replace every sales CRM feature?

This launch covers native records, editing, linking, custom fields and Kanban. Confirm additional needs with Sunvoy before changing an existing workflow.

Ready to get started?

Contact Sunvoy to confirm activation, or [book a demo](#) to see Sunvoy CRM in action.

If you are moving from another CRM, review migration needs and integration behavior first →