



# Training Supplement

---

## Scoop and Sighthen



Version: May 23, 2021

### *Summary*

This Training Supplement will take you through the full contact entry, Sighthen Proposal Creation and Sales Process. When using Scoop, the version that has the fewest bugs and is the most stable is the Web Version. Using Scoop from a laptop or tablet is the best choice. The Phone and Tablet Apps also work but have the greatest number of compatibility issues. This training is illustrated using the tablet app and laptop web versions.

When using Scoop, make sure you have logged out then logged back into the application so you have a fresh copy of the installation.

### **Step 1 – Creating a Scoop**

Click on the Scoop menu on the left of your screen (if in the web app). The default view on both is usually what you have previously selected. At the top of your screen you will see a “plus” sign for adding a Scoop.

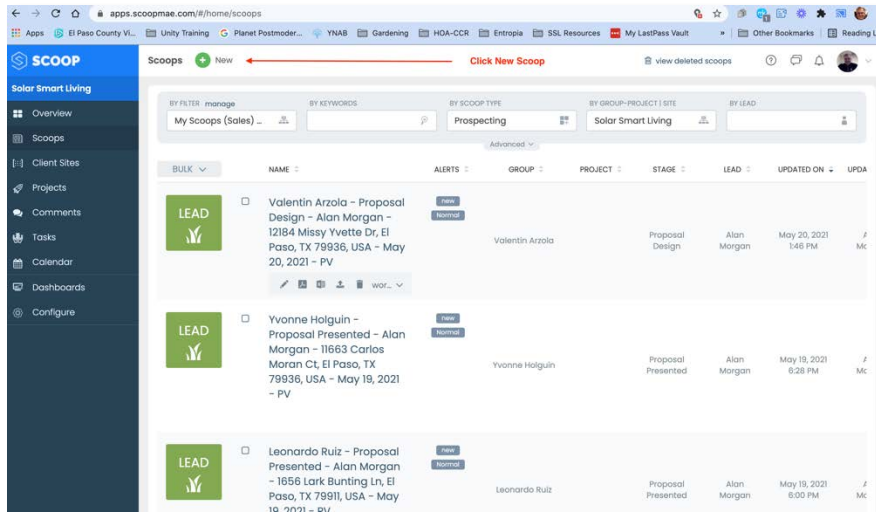


Figure 1- New Scoop – (Web Version)

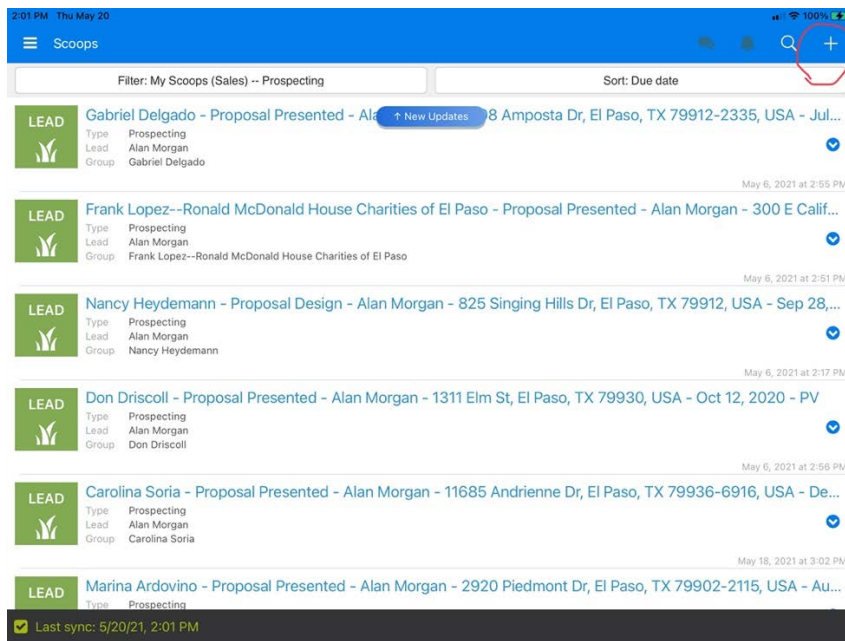


Figure 2 - New Scoop (Tablet Version)

After you click on the plus sign, you are prompted to select a Scoop Template. For the purposes of this training and for sales, select the “Prospecting” Scoop.

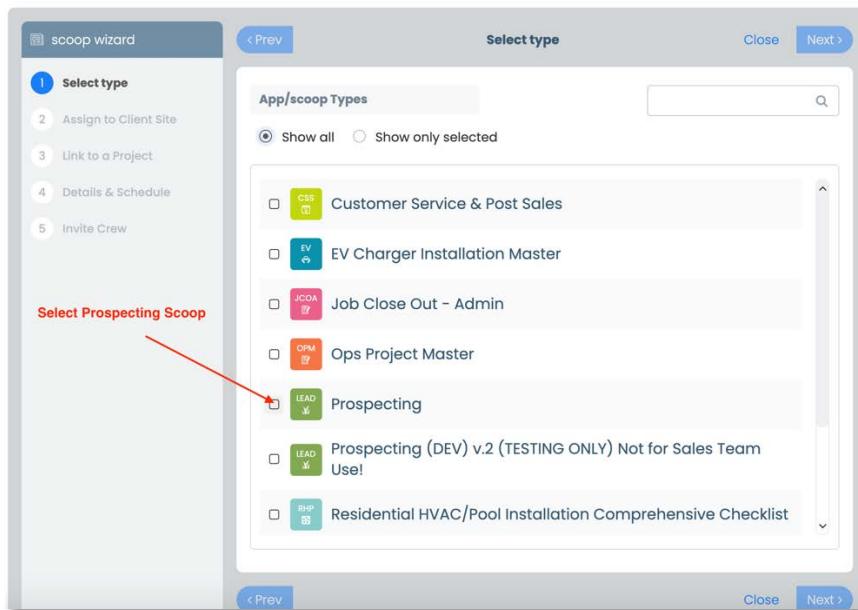


Figure 3 - Prospecting Scoop (Web Version)

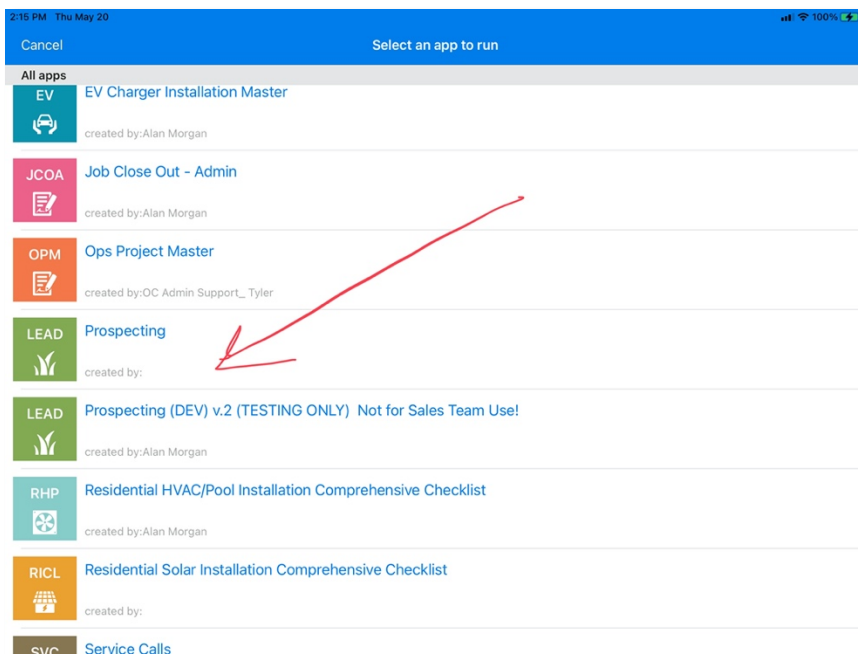


Figure 4 - Prospecting Scoop (Tablet Version)

After you select the Scoop, you will be prompted to either select an existing Client Site Record or Create a New one. If you are creating a Scoop for an existing Client Record, just search for the name in the search field in the top bar. If this is a new client, create a new Client Site Record by clicking on the “plus sign.”

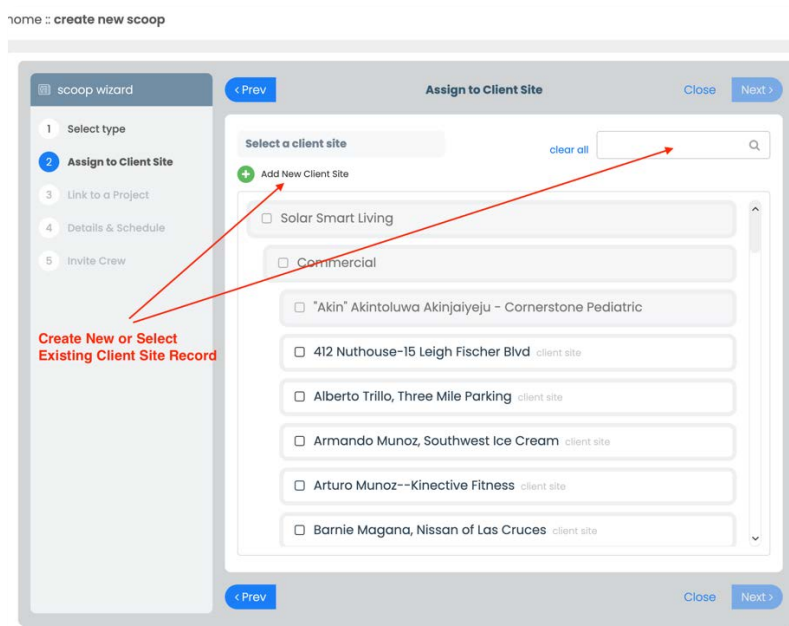


Figure 5 - Client Site (Web Version)

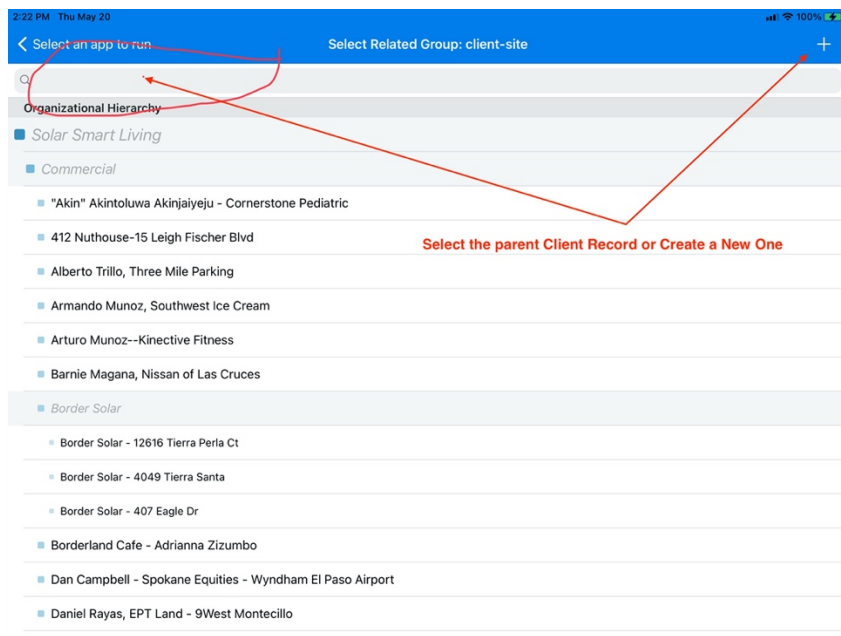
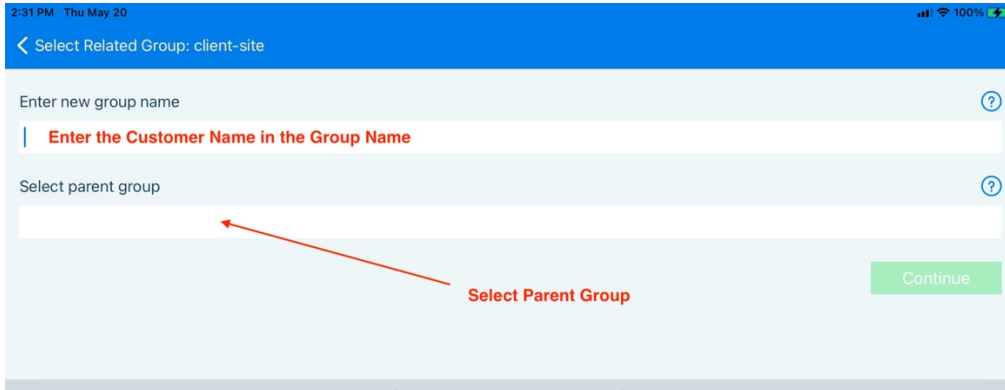


Figure 6 - Client Site (Tablet Version)

If you are adding to an existing Client Site Record, you merely have to search for the name and add it.

If you are creating a new *Client Site Record*, you will be prompted to name the Client Site. This is a label so you can name it however is most appropriate. Using the first and last name of the customer is a best practice. Enter that info in the *Group Name*.



2:31 PM Thu May 20

< Select Related Group: client-site

Enter new group name ?

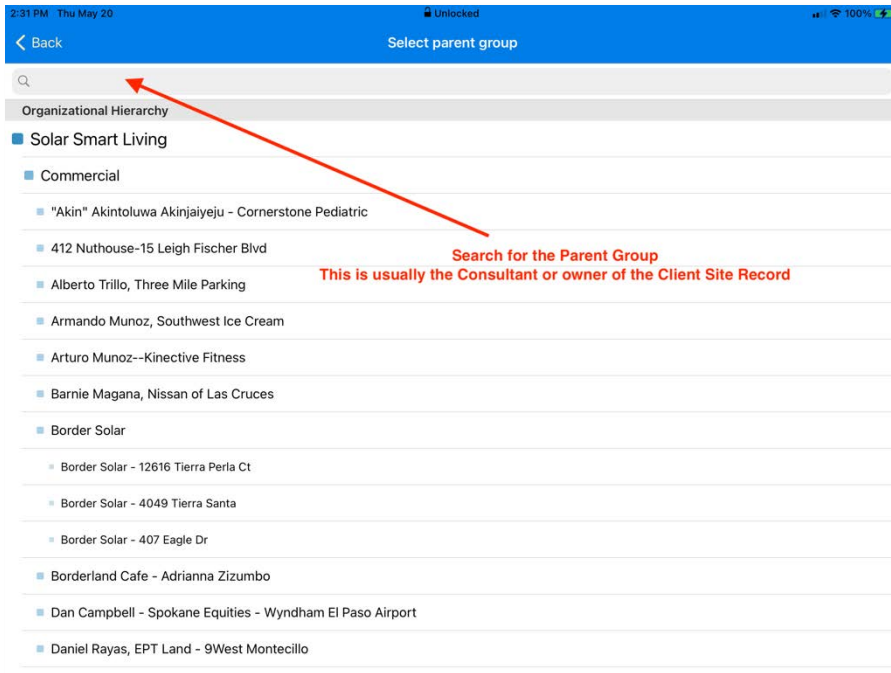
Enter the Customer Name in the Group Name

Select parent group ?

Select Parent Group

Continue

Figure 7 - Group Name (Tablet)



2:31 PM Thu May 20 Unlocked

< Back Select parent group

Search

Organizational Hierarchy

- Solar Smart Living
  - Commercial
    - "Akin" Akintoluwa Akinjaiyeju - Cornerstone Pediatric
    - 412 Nuthouse-15 Leigh Fischer Blvd
    - Alberto Trillo, Three Mile Parking
    - Armando Munoz, Southwest Ice Cream
    - Arturo Munoz--Kinective Fitness
    - Barnie Magana, Nissan of Las Cruces
    - Border Solar
      - Border Solar - 12616 Tierra Perla Ct
      - Border Solar - 4049 Tierra Santa
      - Border Solar - 407 Eagle Dr
    - Borderland Cafe - Adrianna Zizumbo
    - Dan Campbell - Spokane Equities - Wyndham El Paso Airport
    - Daniel Rayas, EPT Land - 9West Montecillo

Search for the Parent Group  
This is usually the Consultant or owner of the Client Site Record

Figure 8 - Group Name (Tablet)

The process for the web version is the same but in reverse.

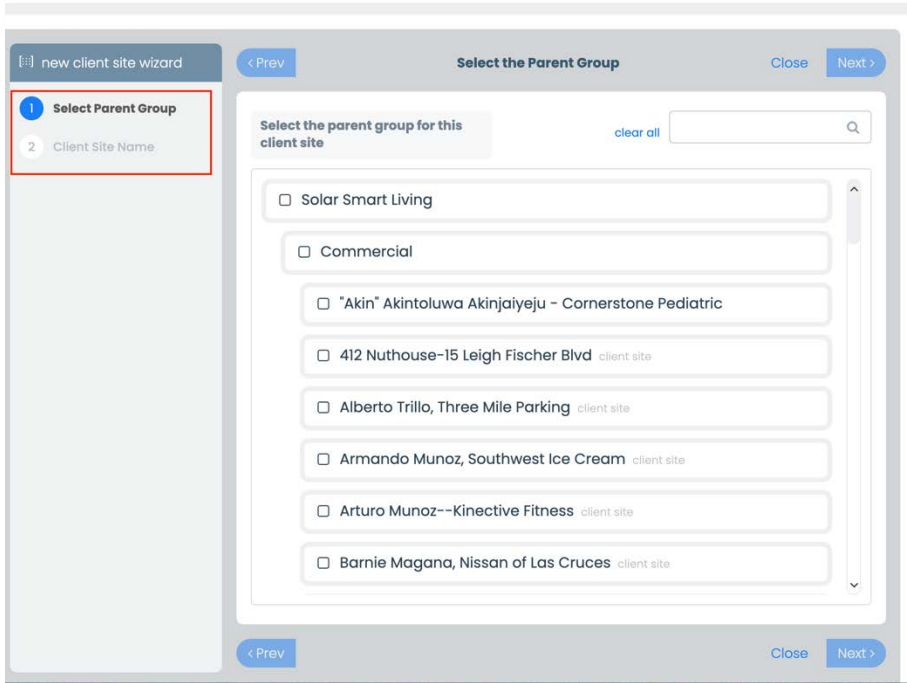


Figure 9 - Group and Parent Selection (Web)

When creating the Scoop on the Tablet or Phone, after selecting the Group Name and Creating the Client Site, the Scoop will be created automatically. On the Web Version, there are a few extra steps you have to take.

- 1.) Fill in the Client Site Wizard and all associate fields. This pre-populates some of the important info for the Scoop.
- 2.) Save the Client Site by selecting the Save Button.



home :: create new client site

new client site wizard

1 Select Parent Group

2 Client Site Name

3 Client & General Information

4 Marketing & Solar Smart Living Contact Info

5 Consultation Info

6 Electrical Detail Information

7 Product and Commission fields

Client & General Information

Solarr

Client Address \*

12345 Main St, Mesilla Park, NM 88047, USA

Client Phone Number \*

675-555-1212

Client Email

Client Company Name

Prev Close Next

Figure 10 - Client Site Wizard (Web)

home :: create new client site

new client site wizard

1 Select Parent Group

2 Client Site Name

3 Client & General Information

4 Marketing & Solar Smart Living Contact Info

5 Consultation Info

6 Electrical Detail Information

7 Product and Commission fields

Product and Commission fields

Is Project Commissionable?

Yes

Click Save

Close Save Next

Close Save Next

Use the create client representative site to participate your performance

Submit

Figure 11 - Save Client Site (Web)

After you create the client site on the web version, you will need to select Create Scoop again and navigate to the newly create Client Site you made.

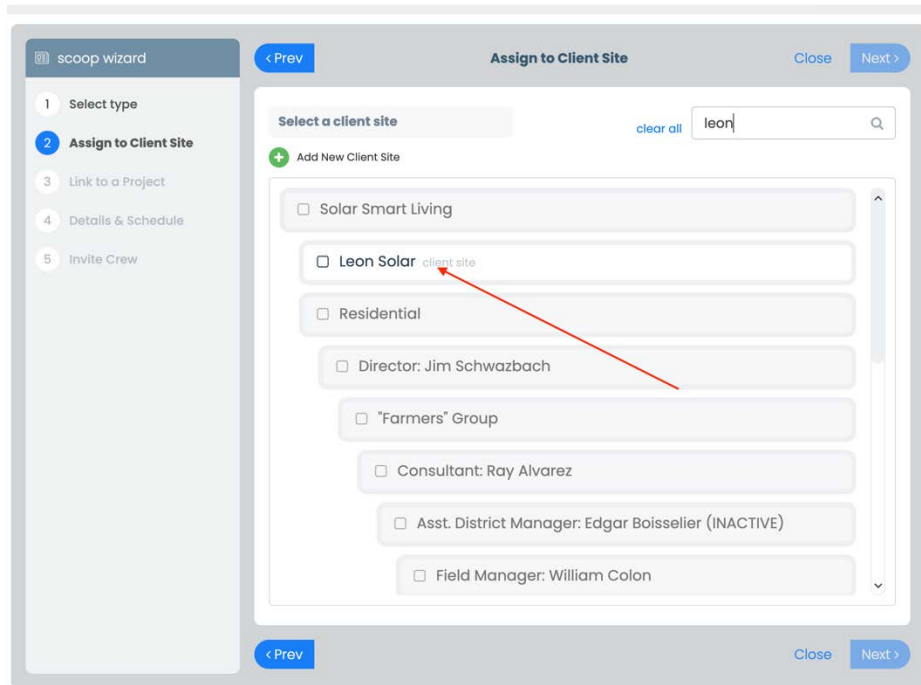


Figure 12 - Select Client Site (Web)

After you select the parent Client Site, click next. You will be prompted to select a project. Skip this and click Next.

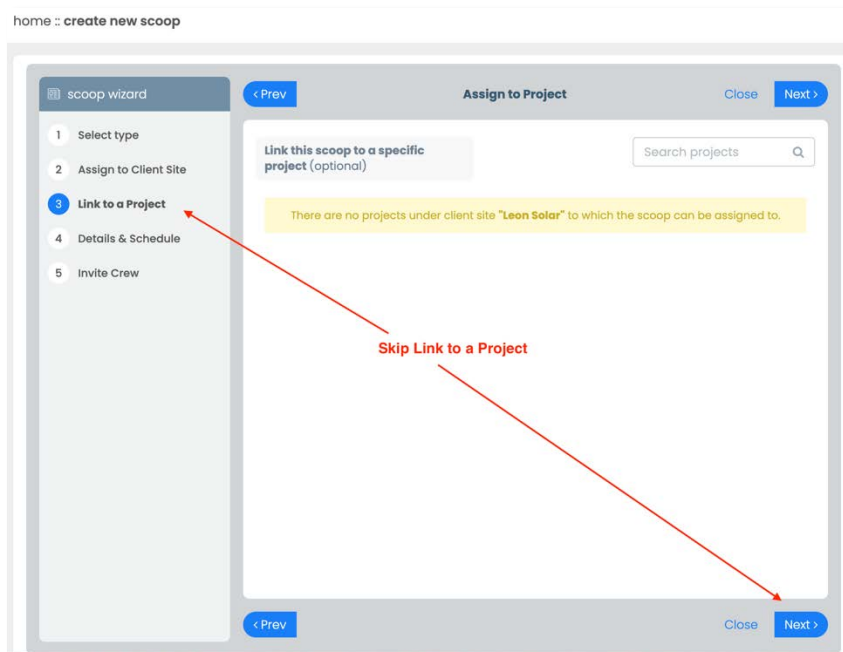


Figure 13 - Skip Project (Web)



home :: create new scoop

scoop wizard

1 Select type
2 Assign to Client Site
3 Link to a Project
4 **Details & Schedule**
5 Invite Crew

Details & Schedule
Close
Next >

Name
Prospecting May 20, 14:54

Description
Provide a quick introductory description of the work involved in this scoop.

Priority
Normal

Schedule on Team Calendar
May 20, 2021 3:00pm ~ 5:00pm May 20, 2021

☐ use end date as due date to send reminders

Add a Description and Remove the Schedule Date

Figure 14 - Description (Web)

Enter a Description of your Scoop (optional) and remove the Schedule Date. Use this only if you are using the Scoop Calendar for reminders. Click Next.

home :: create new scoop

scoop wizard

1 Select type
2 Assign to Client Site
3 Link to a Project
4 Details & Schedule
5 **Invite Crew**

Invite Additional Crew - optional
Close
Save
Next >

+ Add crew

USER	CREW ROLE	ORG ROLE	INVITED BY
Alan Morgan	creator lead	S-Admin	OC Admin Support_ Tyler

Add another crew member and/or click save

Figure 15 - Add Crew and Save (Web)

After you save your Scoop you will either see the list of your Scoops or the Scoop Main Summary Screen. It depends on what version you are using and what your default filter is set to.

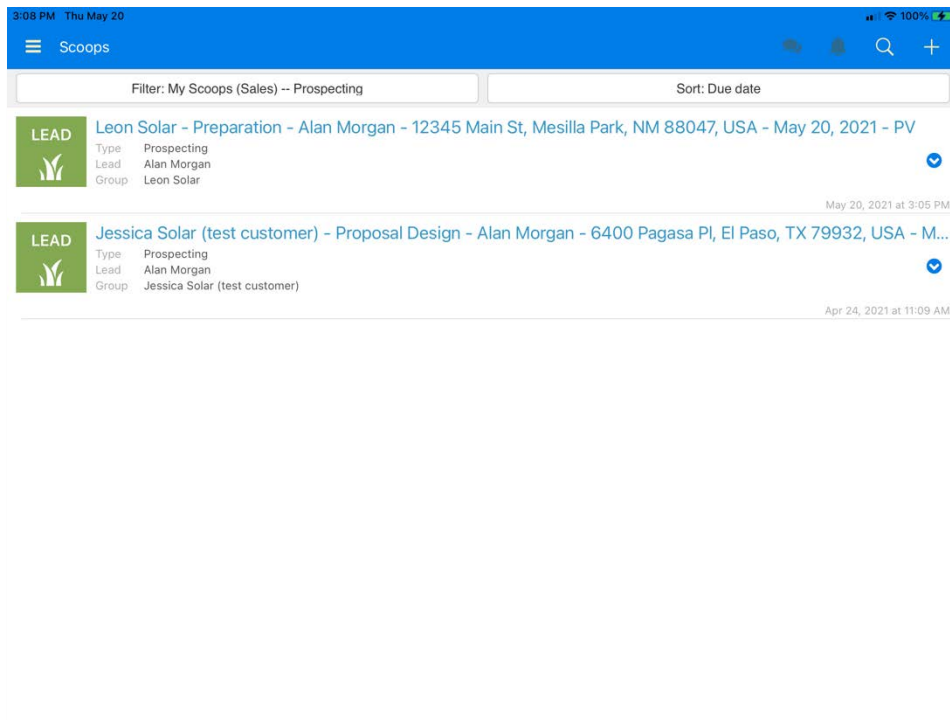


Figure 16 - Scoop List (Tablet)

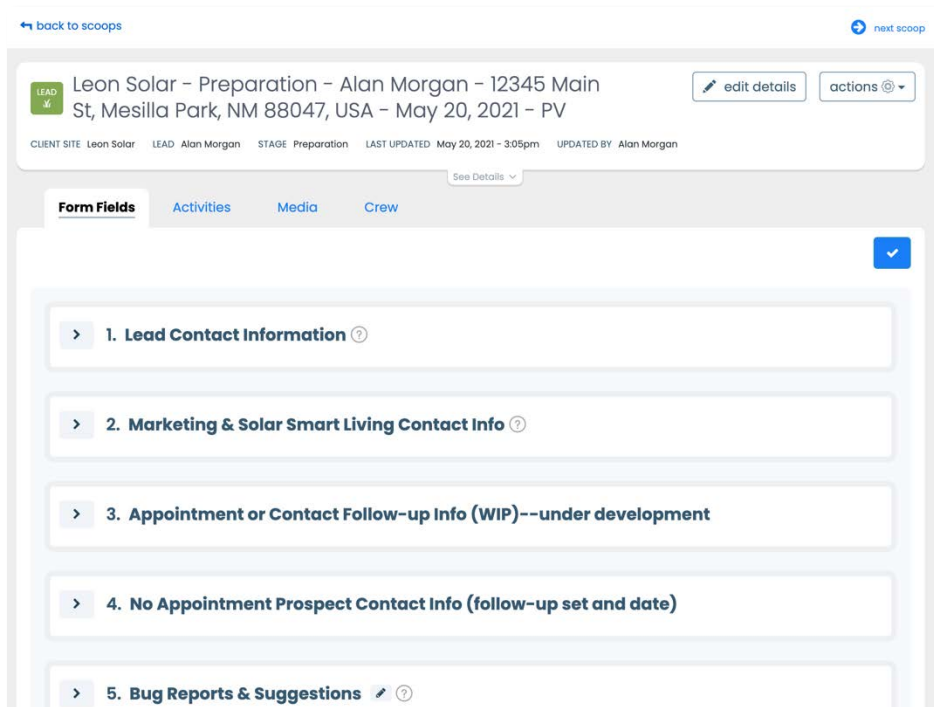


Figure 17 - Scoop Form View (Web)

## Step 2 – Scoop Form Information – Preparation Stage



At this point, you have created the Scoop and possibly a new Client Site. You will not make sure all of the pertinent info is in the Scoop Form. You will notice that in the header, next to your customer's name is "Preparation." This is the Stage Name. Each time you update a Action/Stage for the Scoop, the Stage Name is updated in the Scoop Header. In addition to that info is, the Lead for the Scoop's Name, the address and the date the Scoop was created.

Open the form by selecting the Form Icon.

A screenshot of a tablet screen showing the 'Details' page for a Scoop Form. The top status bar shows the time as 3:30 PM on Thursday, May 20, with 100% battery. The page has a blue header with 'Back' and 'Actions' buttons. Below the header, a green 'LEAD' icon is next to the text 'Leon Solar - Preparation - Alan Morgan - 12345 Main St, Mesilla Park, NM 88047, USA - May 20, 2021 - PV' and 'May 20, 2021 at 3:05 PM'. A text input field with the placeholder 'Please enter a description' is below. A voice recording section shows 'No voice intro. Tap to record.' followed by a list of fields: Type (Prospecting), Lead (Alan Morgan), Group (Leon Solar), Stage (Preparation), Scoop Prio... (Normal), Due Date (None), Start Date (None), and End Date (None). A red arrow points from the text 'Open Scoop Form' to the 'Form' icon in the bottom navigation bar. The bottom bar also includes 'Activities', 'Media', and 'Crew' icons.

Figure 18 - Select Form (Tablet)

This will display a list of the available sections. The ones you want to make sure are always filled out are Section 1 (Lead Contact Information) and Section 2 (Marketing and SSL Contact Info).

Section 1 contains all the info about the customer, including a copy of the electric bill.

Section 2 contains all the information about Sales Consultant, where the Lead/Customer was generated from as well as any pertinent info about who referred them to SSL.

← back to scoops next scoop →

**LEAD** Leon Solar - Preparation - Alan Morgan - 12345 Main St, Mesilla Park, NM 88047, USA - May 20, 2021 - PV edit details actions

CLIENT SITE Leon Solar LEAD Alan Morgan STAGE Preparation LAST UPDATED May 20, 2021 - 3:05pm UPDATED BY Alan Morgan

See Details

**Form Fields** Activities Media Crew

✓

> 1. Lead Contact Information ? ← Fill in both these sections

> 2. Marketing & Solar Smart Living Contact Info ? ←

> 3. Appointment or Contact Follow-up Info (WIP)--under development

> 4. No Appointment Prospect Contact Info (follow-up set and date)

Figure 19 - Section 1 and 2 (Web)

If you have scheduled a date and time for the consultation with the customer, make sure to fill that info into Section 3. This is the appointment information. Make sure these items are filled in. As you move through the next steps, automations will take place in the background that are driven by the data entered in these sections.

← back to scoops prev scoop → next scoop →

**LEAD** Leon Solar - Preparation - Alan Morgan - 12345 Main St, Mesilla Park, NM 88047, USA - May 20, 2021 - PV edit details actions

CLIENT SITE Leon Solar LEAD Alan Morgan STAGE Preparation LAST UPDATED May 20, 2021 - 3:05pm UPDATED BY Alan Morgan

See Details

▼ 3. Appointment or Contact Follow-up Info (WIP)--under development

▼ 3.1 Consultation Info

Field name	Info	Value
3.1.1 Consultation Date	🌐 ?	✖ May 20, 2021 9:00am 📅
3.1.2 Consultation Product Preferences	🌐 ?	
3.1.3 Client visit / call-ahead preferences	🌐 ?	

Figure 20 - Consultation (Web)

### Step 3 – Changing the Stages

Once you have all three of these sections filled in, you are ready to update the stages so you can work on the design proposal in our online proposal tool. At the time of writing this document, that is Sighthen.



The reason filling in all of this information is so important is that it connects with Sighthen and Zoho, our CRM. All of our sales and contact data is stored there. We run sales and marketing reports that help us know how we are doing both in sales, where leads come from and how effective our marketing efforts are.

#### ***Stage 1 – Preparation***

You are already in this stage.

#### ***Stage 2 – Lead Assigned***

This stage creates a task that helps you with follow up with the customer. It generates and email that notifies you that a Scoop has been assigned to you. This is important because in many cases someone else might create the Scoop for you. This could be due to a lead being generated by our marketing efforts or a customer referred the new Lead to us.

A screenshot of the Zoho CRM interface for a lead named "Leon Solar - Preparation - Alan Morgan". The lead is in the "Preparation" stage. A dropdown menu is open under the "actions" button, showing various options. The "Workflow Actions" section is highlighted, and the "Lead Assigned" action is selected. A red arrow points from the "Lead Assigned" action to the "actions" button. Below the screenshot, the text "Select Actions then 'Lead Assigned'" is written in red.

Figure 21 - Lead Assigned (Web)

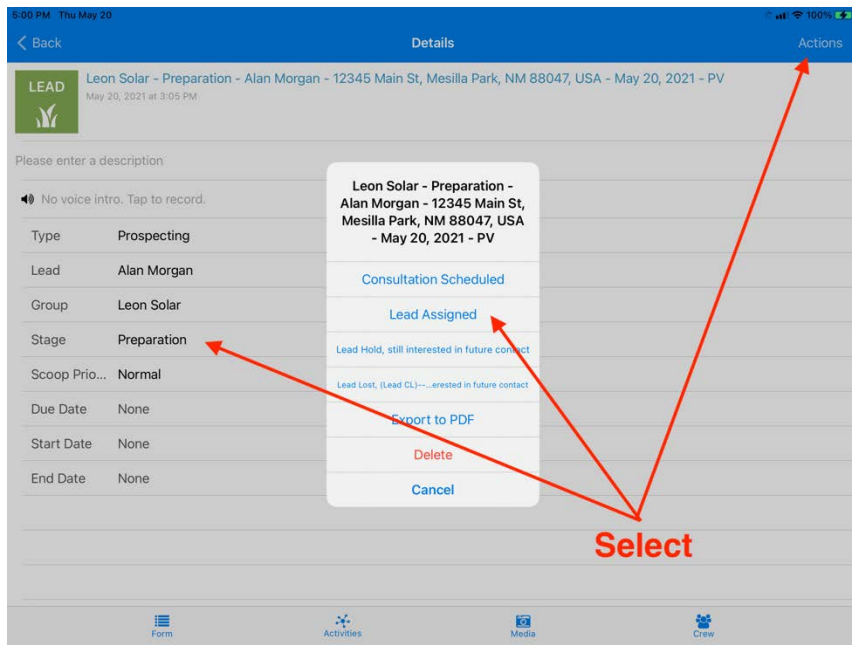


Figure 22 - Lead Assigned (Tablet)

The Task that is assigned can be found under the Task or Activities for the Scoop Record.

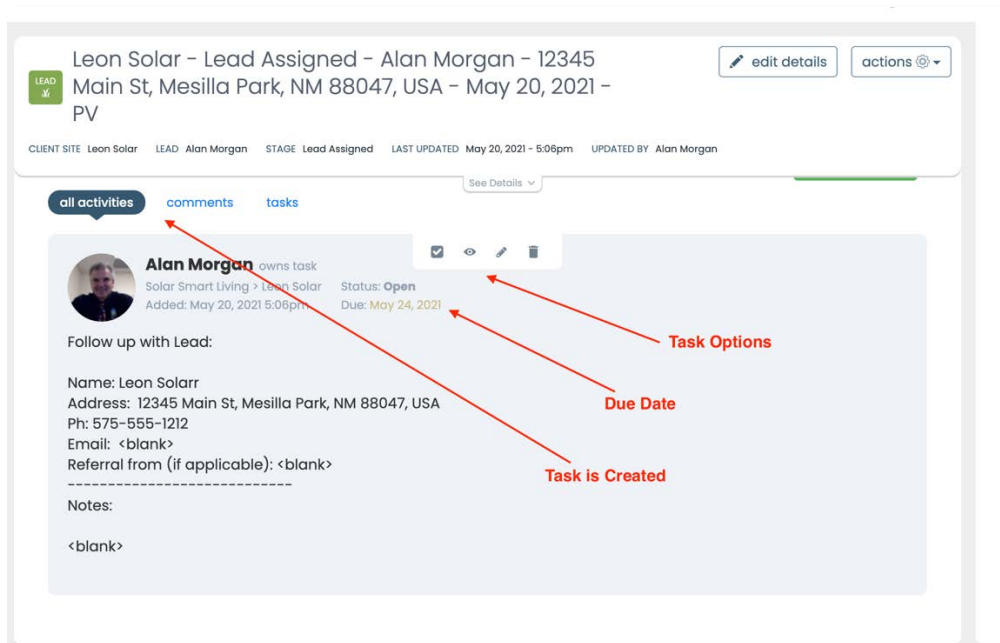


Figure 23 - Lead Assigned Task (Web)

The Task will show the due date, and the notes for the task. You can use this to stay organized.



The Task Options include: Complete, View, Edit and Trash Icons. The Complete Checkbox will complete the task when you are done following up. The Edit will allow you to change the due date or add additional notes. The View and Trash icons you won't need to use.

As part of the process of changing the Stage to Lead Assigned, an email is generated to let you know a Scoop has been assigned to you. On the following page, you will see an example of the content included in the notification email.

A screenshot of a tablet application interface. At the top, a blue header bar contains a back arrow, the word "Details", and an "Actions" button. Below the header, a green "LEAD" icon is next to the text "Leon Solar - Lead Assigned - Alan Morgan - 12345 Main St, Mesilla Park, NM 88047, USA - May 20, 2021 - PV" and a timestamp "May 20, 2021 at 5:06 PM". A text input field with the placeholder "Please enter a description" is below. A speaker icon and the text "No voice intro. Tap to record." are next. A list of fields follows: Type (Prospecting), Lead (Alan Morgan), Group (Leon Solar), Stage (Lead Assigned), Scoop Prio... (Normal), Due Date (None), Start Date (None), and End Date (None). A red arrow points from the text "Task and Comments Icon" to the "Activities" icon in the bottom navigation bar. The bottom bar also includes "Form", "Media", and "Crew" icons.

Type	Prospecting
Lead	Alan Morgan
Group	Leon Solar
Stage	Lead Assigned
Scoop Prio...	Normal
Due Date	None
Start Date	None
End Date	None

Figure 24 - Task & Comments (Tablet)

New Scoop Assigned to you. Leon Solar is waiting to hear from you.



External

Hello Consultant Name,

You have a new Scoop (LEAD). If you have not done so already, please, follow up with Leon Solar to further qualify them and/or schedule an appointment. If there is additional info available, it will be below in the notes and within the notes fields in Sections 1 and 2 of this Scoop.

When you contact the prospect and if they not interested right now, but want you to keep in touch, set a **follow-up date** (in Section 4 of this Scoop--include notes for the follow up). Change the Scoop Stage to "Client Lost, still interested in future contact".

If customer turns out to be NOT interested at all or is UNQUALIFIED, change Stage to "Closed-Loss." This will remove this Scoop from your Scoops view.

**Lead info:**

**Product Type:** PV

**Name:** Leon Solarr

**Address:** 12345 Main St, Mesilla Park, NM 88047, USA

**Primary Phone:** 575-555-1212

**Email:**

**Customer Notes:**

**Referrer's Name:**

**Referral Notes (if applicable):**

**IMPORTANT!!** Follow up with customer within 3 hours or as soon as possible and enter notes in Scoop. Good Luck!!! Solar Smart Living Management Scoop Process Support. Check this Scoop first before creating a duplicate.





Current Scoop: Leon Solar - Preparation - Alan Morgan - 12345 Main St, Mesilla Park, NM 88047, USA - May 20, 2021 - PV |Leon Solar | May 20, 2021 |

Created by: Alan Morgan

This message is generated automatically by [Scoop® MAE](#). Do not reply.



### ***Stage 3 – Consultation Scheduled***

This stage will generate and email to the customer to remind them about your appointment date and time. It is filled with the information you put into Section 3 for the Consultation Date/Time. If you did not fill in this info the email will look incomplete.

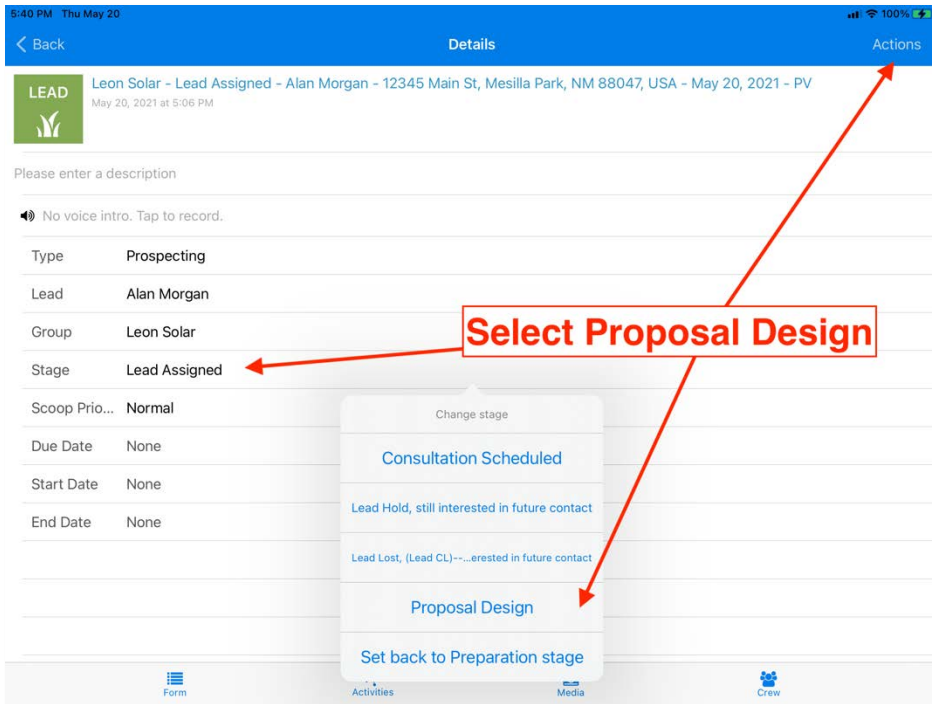
You may skip this step and go straight to Proposal Design if you do not want the email to be generated. The benefit of completing this step is if the appointment is more than 3 days from now, a reminder email will be sent to the customer a day before the appointment.

### ***Stage 4 – Proposal Design***

Changing the stage to Proposal Design will create a proposal in Zoho CRM for us to track sales. This is very important. It will also copy and sync the contact info with Sighthen and create the contact record. As you can imagine, **Proposal Design is a very important step and not starting the proposal process in Scoop and going straight to Sighthen could break the automated processes and create extra work for multiple people.**

A screenshot of the Zoho CRM interface for a lead named "Leon Solar". The lead is assigned to "Alan Morgan" and has a status of "Lead Assigned". The address is "Main St, Mesilla Park, NM 88047, USA" and the date is "May 20, 2022". The interface shows a list of form fields: "1. Lead Contact Information", "2. Marketing & Solar Smart Living Contact Info", "3. Appointment or Contact Follow-up Info (WIP)--under development", and "4. No Appointment Prospect Contact Info (follow-up set and date)". A dropdown menu is open, showing options: "Export to PDF", "Export to Excel", "Map GPS location(s)", "Clone", "Open in calendar", "Delete", and "WORKFLOW ACTIONS". Under "WORKFLOW ACTIONS", there are several options: "Set back to Preparation stage", "Lead Hold, still interested in future contact", "Lead Lost, (Lead CL)--Not interested in future contact", "Consultation Scheduled", and "Proposal Design". A red arrow points to the "Proposal Design" option, and a red text label "Set Proposal Design Stage" is next to it.

Figure 25 - Proposal Design Stage (Web)



5:40 PM Thu May 20

Details

Actions

**LEAD** Leon Solar - Lead Assigned - Alan Morgan - 12345 Main St, Mesilla Park, NM 88047, USA - May 20, 2021 - PV  
 May 20, 2021 at 5:06 PM

Please enter a description

No voice intro. Tap to record.

Type	Prospecting
Lead	Alan Morgan
Group	Leon Solar
Stage	Lead Assigned
Scoop Prio...	Normal
Due Date	None
Start Date	None
End Date	None

Change stage

- Consultation Scheduled
- Lead Hold, still interested in future contact
- Lead Lost, (Lead CL)---...erested in future contact
- Proposal Design**
- Set back to Preparation stage

Form Activities Media Crew

Figure 26 - Proposal Design Stage (Tablet)

## Step 4 – Sighthen Steps

After you have changed the stage in Scoop to “Proposal Design” the contact record is created and connected to Scoop. This connection will populate the system and contract info in Scoop after the customer signs their contract and moves forward with going solar.

This is an important step because if you create the proposal in Sighthen without creating the contact record in Scoop first, a lot of extra work will have to be done manually, increasing the potential of mistakes and inaccurate information for Operations, Zoho and all of the other integrated systems we use.

So before you change the stage do one last check to make sure everything is filled out in Section 1 and Section 2. Here is a quick list of what is mandatory:

### Section 1 – Lead Contact Information

- *Client First Name*
- *Client Last Name*
- *Client Address*
- *Client Phone Number*

- *Client Email*


A screenshot of a web-based form for a solar lead. At the top, it says "Leon Solar - Lead Assigned - Alan Morgan - 12345" followed by "Main St, Mesilla Park, NM 88047, USA - May 20, 2021 - PV". There are buttons for "edit details" and "actions". Below this is a breadcrumb trail: "CLIENT SITE Leon Solar > LEAD Alan Morgan > STAGE Lead Assigned > LAST UPDATED May 20, 2021 - 5:06pm > UPDATED BY Alan Morgan". The form contains five sections: "1.1 Client First Name" with the value "Leon", "1.2 Client Last Name" with the value "Solarr", "1.3 Title (Occupation)" which is empty, "1.4 Client Address" with the value "12345 Main St, Mesilla Park, NM 88047, USA", and "1.5 Client Phone Number" with the value "575-555-1212". Each section has icons for settings, a globe, and a help icon.

Figure 27 - Section 1 (Web)

## Section 2 – Marketing & Solar Smart Living Contact Info

- *Consultant Name (Dropdown)*
- *Consultant Name*
- *Consultant Email*
- *Consultant Phone*

The remaining info in Sections 1 and 2 still need to be filled out but are not required to start the proposal in Sighten. You may come back to them later to fill them in.



back to scoops next scoop

Leon Solar - Lead Assigned - Alan Morgan - 12345  
Main St, Mesilla Park, NM 88047, USA - May 20, 2021 - PV

edit details actions

CLIENT SITE Leon Solar LEAD Alan Morgan STAGE Lead Assigned LAST UPDATED May 20, 2021 - 5:06pm UPDATED BY Alan Morgan

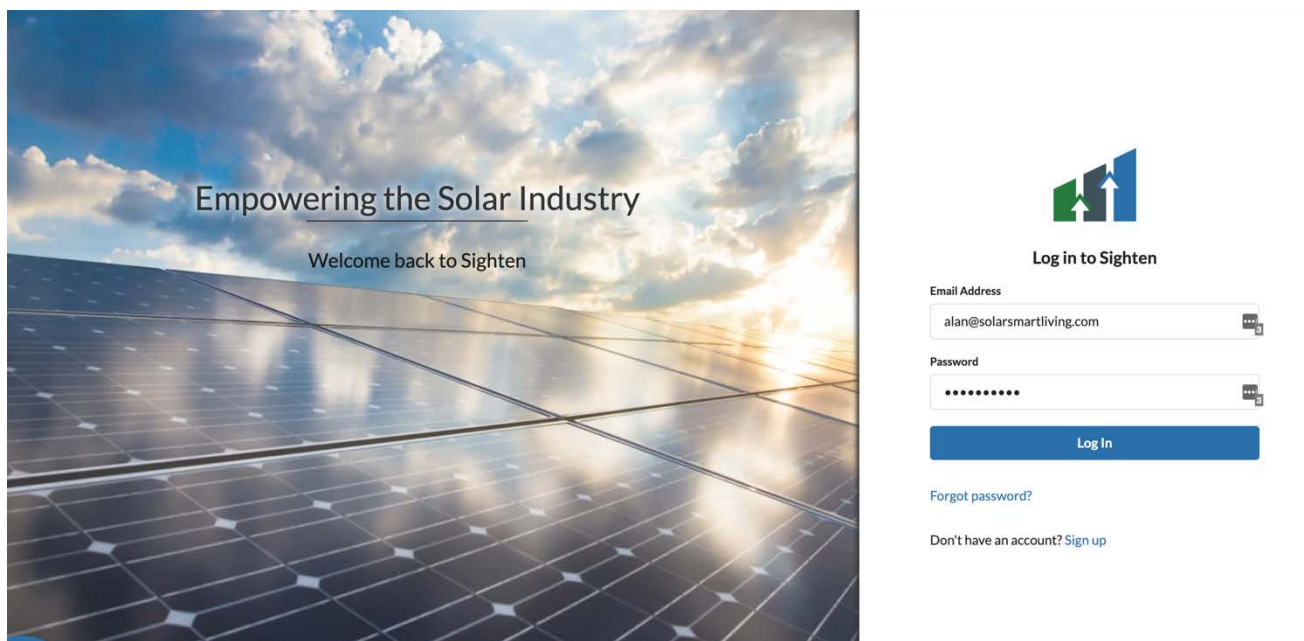
See Details

2. Marketing & Solar Smart Living Contact Info ? **Select Consultant**

Field name	Info	Value
2.1 Consultant Name (dropdown)	🌐	Alan Morgan
2.2 Consultant Name	⚙️ 🌐 ?	Alan Morgan
2.3 Consultant Email	⚙️ 🌐 ?	alan@solarsmartliving.com
2.4 Consultant Phone	⚙️ 🌐 ?	915-207-3456

Figure 28 - Section 2 (Web)

Sign into Sighthen: <https://engine.sighthen.io/>



The Sighthen Log In Screen features a background image of solar panels under a bright, cloudy sky. The text "Empowering the Solar Industry" is centered at the top, followed by "Welcome back to Sighthen". On the right side, there is a login form with the title "Log in to Sighthen". The form includes fields for "Email Address" (with the value alan@solarsmartliving.com) and "Password" (masked with dots). Below these fields is a blue "Log In" button. At the bottom of the form, there are links for "Forgot password?" and "Don't have an account? Sign up".

Empowering the Solar Industry

Welcome back to Sighthen

**Log in to Sighthen**

Email Address  
alan@solarsmartliving.com

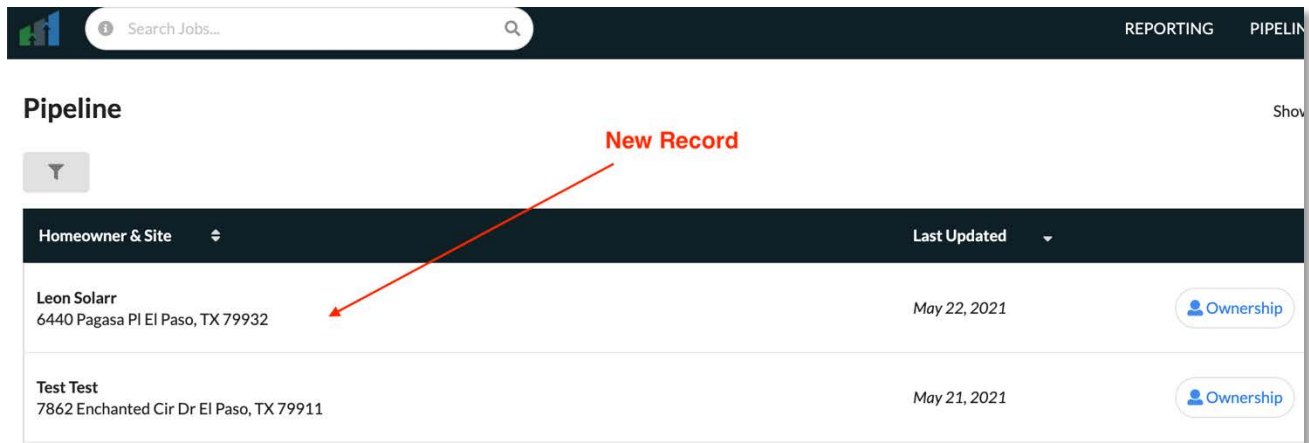
Password  
.....

Log In

[Forgot password?](#)

[Don't have an account? Sign up](#)

Figure 29 - Sighthen Log In Screen (Web Only)



**Pipeline**

Search Jobs... REPORTING PIPELINE

Homeowner & Site Last Updated

Leon Solarr 6440 Pagasa Pl El Paso, TX 79932	May 22, 2021	Ownership
Test Test 7862 Enchanted Cir Dr El Paso, TX 79911	May 21, 2021	Ownership

Figure 30 - Sighen Site Record List

You will find the record you created right at the top. No click on it and go to the Contact/Lead Icon on the left of the screen.

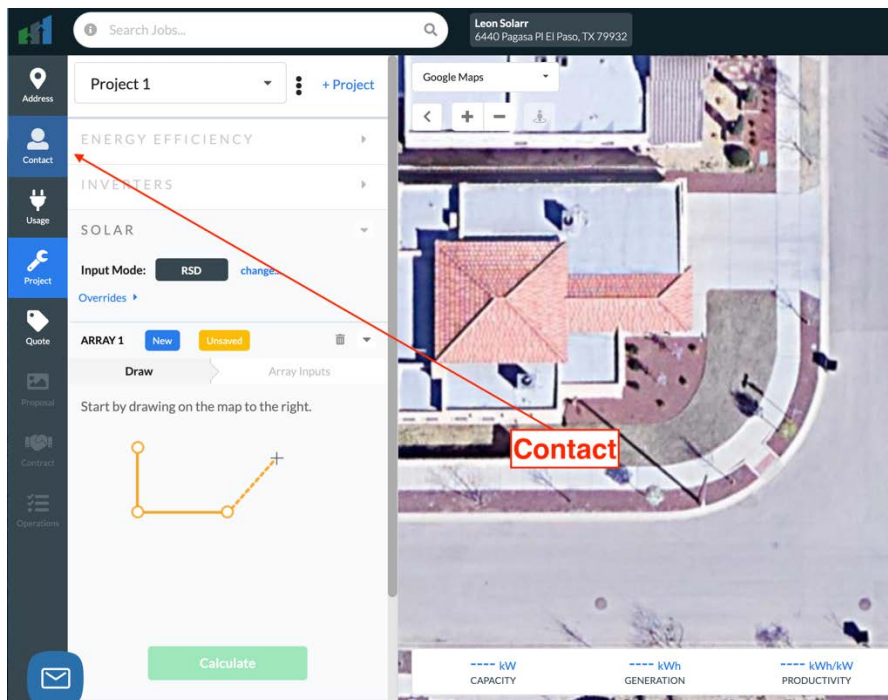


Figure 31 - Sighen Contact (Web)

When you are in the contact screen, take the time to check your contact records. Make sure there are no errors, duplicates or missing records. Correct the errors if there are any or add additional records

you need to. A good example of this is, if you have a couple you may want to create a record the shows both. This way the proposal will address both of them.

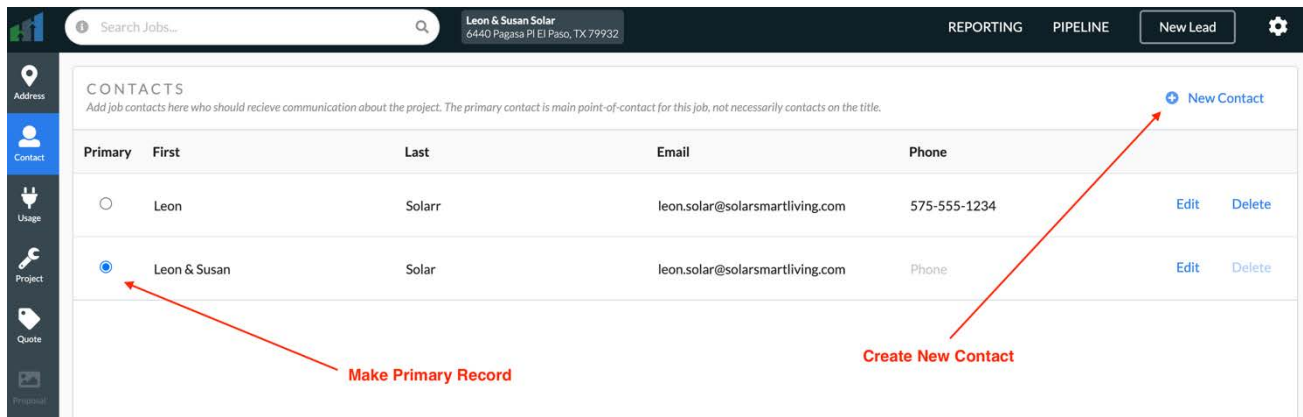


Figure 32 - Sigheten Contact List

Simply click on “New Contact” and create a new record that says both the client and spouse’s name (if not already created by Scoop). Make the new record the Primary.

Now continue your usual steps in Sigheten. Training for Sigheten is done in a separate module so we will not go through them here. For reference, here is a summary list of your steps in Sigheten

- *Enter Consumption Info in Usage*
- *Create Design in Project*
- *Create your Quote*
- *Create Your Proposal*
- *Send and Sign Contract (if applicable)*

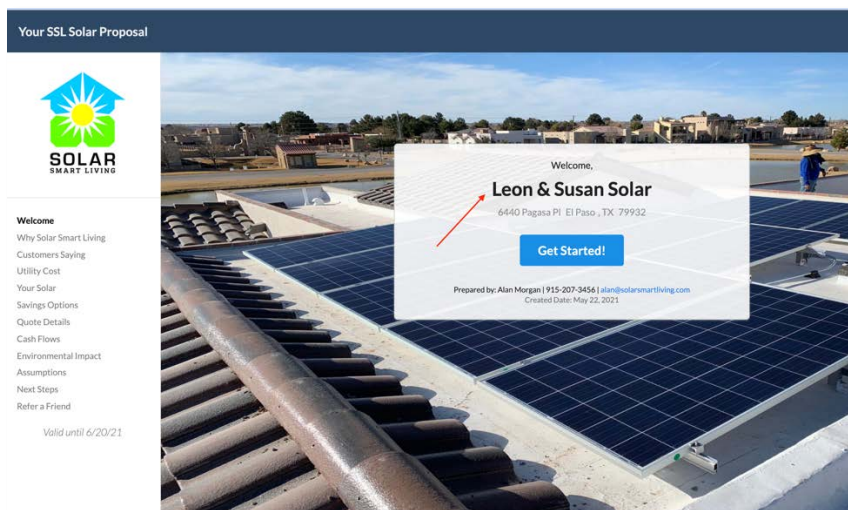


Figure 33 - Proposal Intro





When you use a combine contact record as in the above example, this will show on the proposal. This is only for use with the proposal. When you send the contract, make sure to set the correct contact records back to the normal ones. This can be done on the Contract Screen.

**Contract 1** **CONTRACT STATUS** Send E-Sign Upload Void

Created: May 22, 2021 Blocked  
Last Updated: May 22, 2021

**QUOTE INFORMATION**

Product	Term	Install Cost	Install Cost per Watt	Monthly Payment	Monthly Payment Ream	Monthly Payment NR	Total Savings - 30 yrs	Total Savings % - 30 yrs	Initial Payment
1 LPA Loan	20 years	\$34,100	\$4.060 / W	\$143	\$143	\$195	\$9,739	15.53%	\$0

**RECIPIENTS** New Recipient

Order	Role	Name	Email	Status
1	Contractor	Alan Morgan	alan@solarsmartliving.com	Not Started
2	Homeowner	Leon & Susan Solar	leon.solar@solarsmartliving.com	Not Started
3	Homeowner	Leon Solarr	leon.solar@solarsmartliving.com	Not Started

**DOCUMENTS** Preview Download Remove Unused Contracts

Figure 34 - Remove Unused Contracts

Click on the trash can icon next to the records you do not want to send a copy of the contract to.

### Step 5 – After the proposal has been presented

#### Stage 5 – Proposal Presented

After you have met with and/or discussed the proposal with the customer, you want to go back into Scoop and change the Stage. This is very important because this stage updates both the Sales Proposal in Zoho and any related Lead info in the Solar Smart Living App.



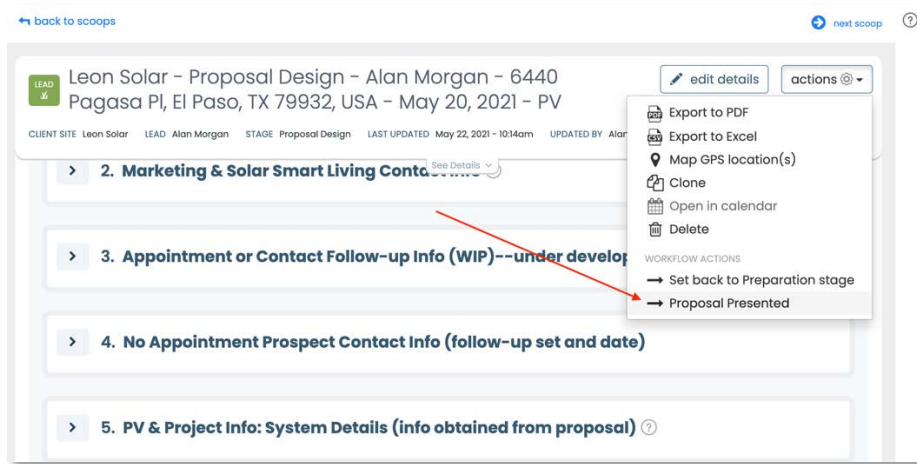


Figure 35 - Proposal Presented (Web)

Do this regardless of the outcome of the meeting.

### **Presented but Customer Needs to Think About it**

In addition to changing the stage you will want to enter notes in the comments section of the Scoop.

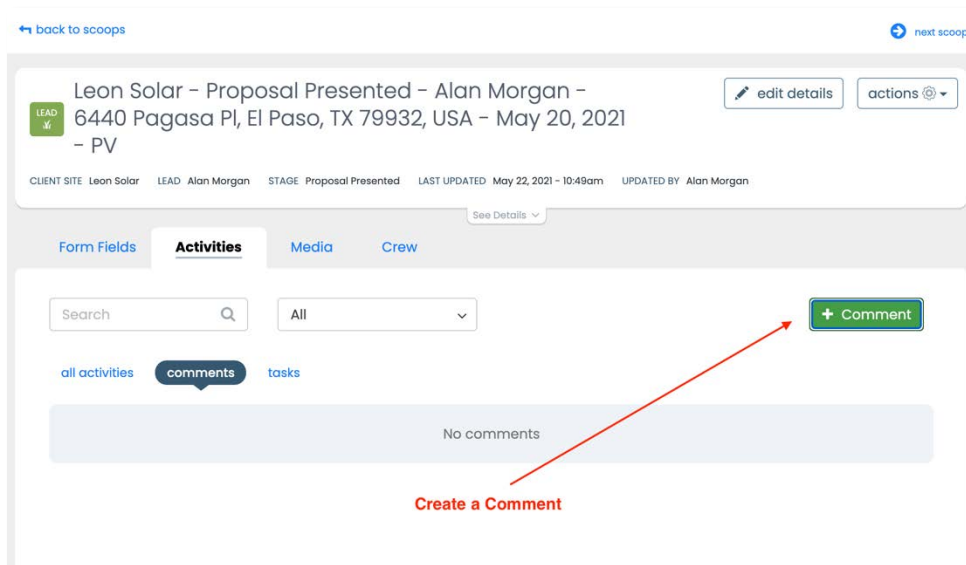


Figure 36 - Create Comment

Make sure to write detailed notes about your meeting any and any future planned actions. This will help you remember details as well as provide info to management to further help you if needed.

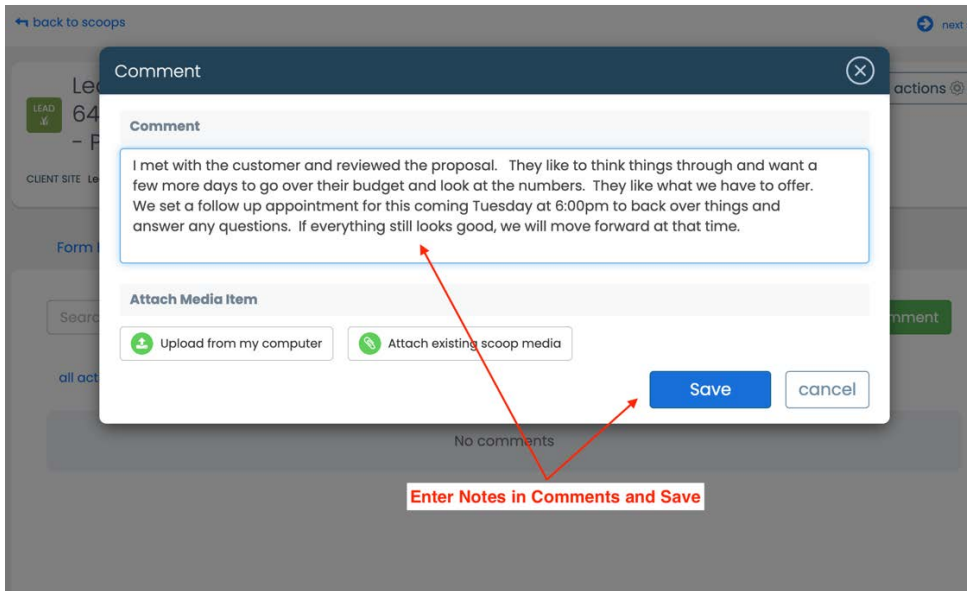


Figure 37 - Write Notes

### **Presented but Customer Failed Credit**

In addition to changing the stage you will want to enter notes in the comments section of the Scoop. You will also change the Stage to Closed Loss. Since the customer may not be able to move forward there may be a opportunity to get referrals (The SSL App) and/or keep in touch for a later date. This stage is “Client Lost but still interested in future contact.” If this is the outcome, you will want to fill in the following info before changing the stage.

**Fill in any follow-up notes** to remind the customer. Make sure this is legible and in proper grammar. This note the customer will see in the follow up email that is sent at the follow up date.

**Fill in the reason for the Closed Loss.**

**Fill in the Follow-up Date** (if applicable). This is the date the follow up email will be sent to the customer on your behalf.

Make sure to fill in all three of these fields.

← back to scoops next scoop →

Leon Solar - Proposal Presented - Alan Morgan -  
 6440 Pagasa Pl, El Paso, TX 79932, USA - May 20, 2021  
 - PV

CLIENT SITE: Leon Solar | LEAD: Alan Morgan | STAGE: Proposal Presented | LAST UPDATED: May 22, 2021 - 10:49am | UPDATED BY: Alan Morgan

See Details ▾

▼ **4. No Appointment Prospect Contact Info (follow-up set and date)**

Field name	Info	Value
4.1 Client preferences for future contact	?	<input type="text"/>
4.2 Follow up Notes	?	Customer could not move forward at this time but wants us to check in in 6 months as they build their credit.
4.3 Closed Loss Reasons	?	Failed Credit but want to keep in touch
4.4 Date for follow up	?	November 19, 2021 <input type="text"/>

*Use these 3 fields in a Closed Loss Situation* (with arrows pointing to 4.2, 4.3, and 4.4)

Figure 38 - Closed Loss (web)

### Presented and the customer is ready to run credit and sign HIC

In addition to changing the stage you will want to enter notes in the comments section of the Scoop. This is helpful for managing the customer in the future. Good notes might be some take-aways you got from the appointment. What excites the customer about going solar. Notes about possible referrals, etc.

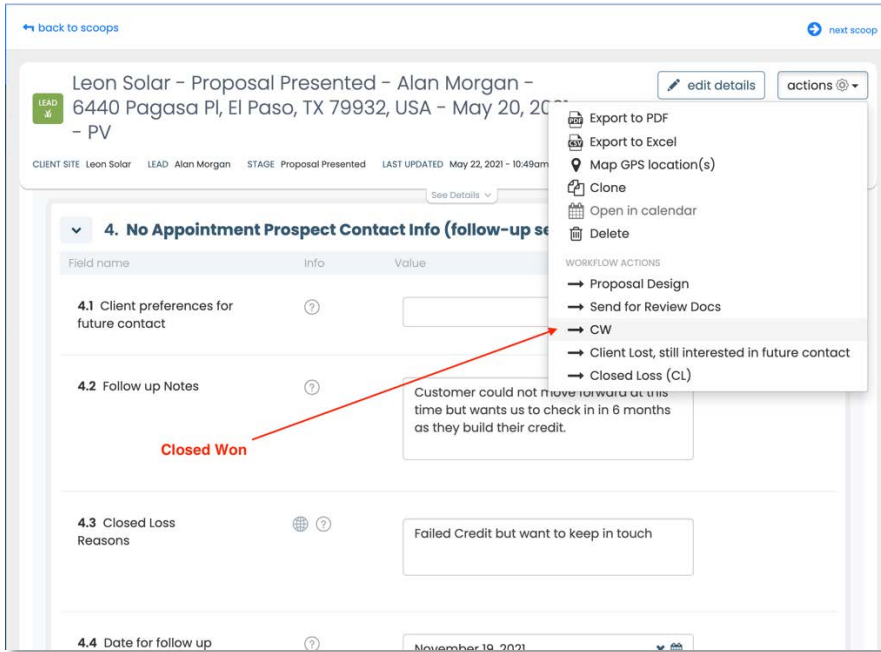
### Step 6 – Contract Signing

At this point the customer is ready to move forward. Great job!!! You will run credit via the LoanPal Pros App or the app for the finance company we are using.

You will send them the contract via Sighten (see associated training for this).

### Stage 6 – CW

The contract is signed and the customer has either passed credit or given you a check for the down payment for the system since they paid cash. What you want to do is change the stage to “CW.”



back to scoops

next scoop

Leon Solar - Proposal Presented - Alan Morgan - 6440 Pagasa Pl, El Paso, TX 79932, USA - May 20, 2021 - PV

CLIENT SITE: Leon Solar LEAD: Alan Morgan STAGE: Proposal Presented LAST UPDATED: May 22, 2021 - 10:49am

See Details

4. No Appointment Prospect Contact Info (follow-up section)

Field name	Info	Value
4.1 Client preferences for future contact	?	
4.2 Follow up Notes	?	Customer could not move forward at this time but wants us to check in in 6 months as they build their credit.
4.3 Closed Loss Reasons	?	Failed Credit but want to keep in touch
4.4 Date for follow up	?	November 19, 2021

Workflow Actions:

- Proposal Design
- Send for Review Docs
- CW
- Client Lost, still interested in future contact
- Closed Loss (CL)

Closed Won

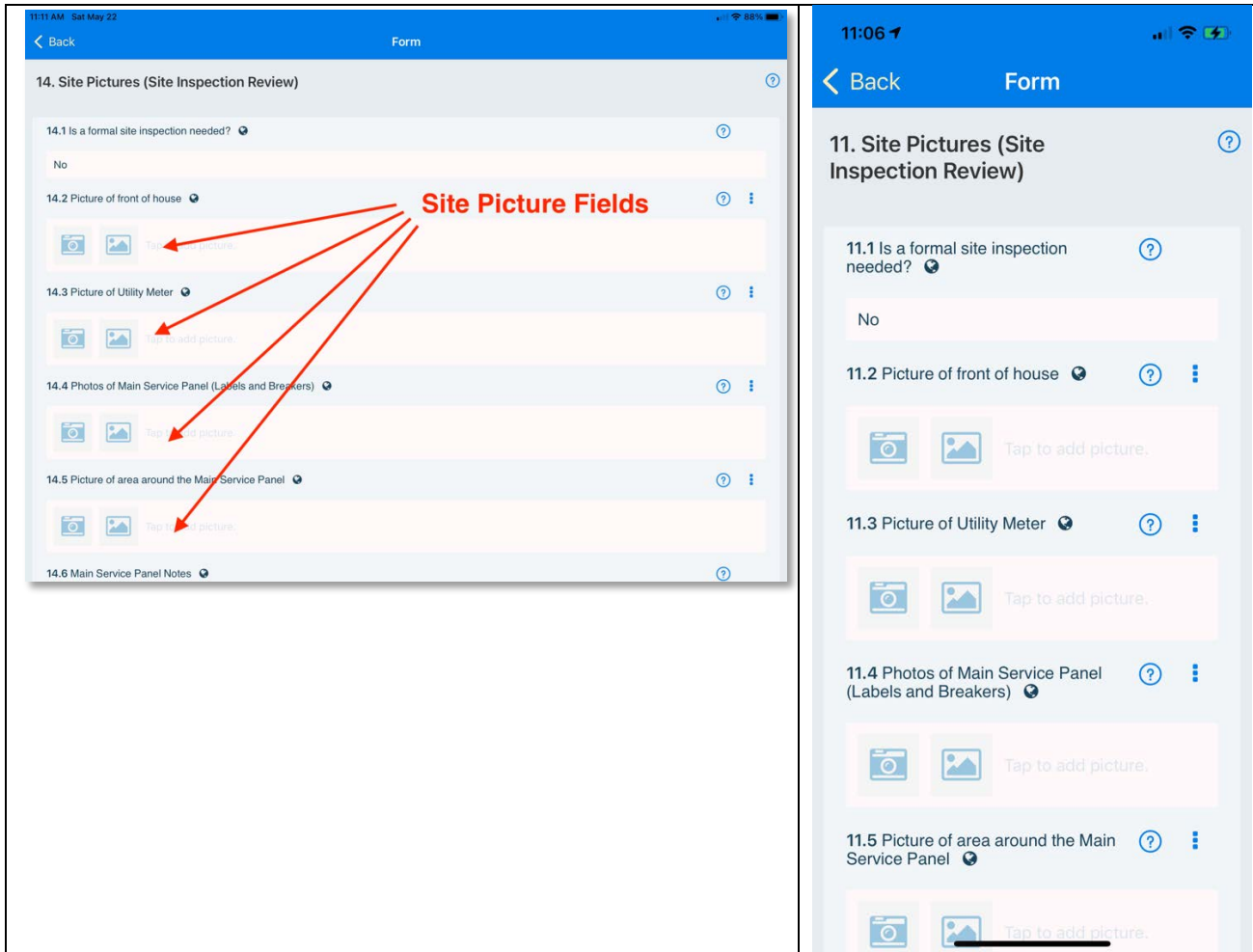
Figure 39 – CW

After you select this CW stage, several things will happen in the background.

1. An email will be sent to the Director letting him know you have completed all steps for the sale. He can now process all the paperwork.
2. Sighthen to copy all of the system and contract info back into Scoop
3. The next set of sections will become visible..

### Step 7 – Site Pictures

After the contract is signed, you will return to Scoop to take pictures for the Site Inspection. This is best done through your phone or tablet applications.



**Site Picture Fields**

14.1 Is a formal site inspection needed?

No

14.2 Picture of front of house

Tap to add picture.

14.3 Picture of Utility Meter

Tap to add picture.

14.4 Photos of Main Service Panel (Labels and Breakers)

Tap to add picture.

14.5 Picture of area around the Main Service Panel

Tap to add picture.

14.6 Main Service Panel Notes

11.1 Is a formal site inspection needed?

No

11.2 Picture of front of house

Tap to add picture.

11.3 Picture of Utility Meter

Tap to add picture.

11.4 Photos of Main Service Panel (Labels and Breakers)

Tap to add picture.

11.5 Picture of area around the Main Service Panel

Tap to add picture.

*Site Pictures (Tablet and Phone)*

Make sure to take pictures for each of the slots. **Do not upload pictures to the general media tab.** That tab is a summary tab and its contents will not transfer to the associated Scoops such as the Operations Scoops.

The individual fields in the Site Pictures Section are Global fields and accessible by all Scoops attached to the associated Clients Site. So, no matter how tempted you might be to cut corners and save time **do not upload pictures or documents to the general media tab.**



Leon Solar - Proposal Presented - Alan Morgan -  
6440 Pagasa Pl, El Paso, TX 79932, USA - May 20, 2021  
- PV

edit details actions

CLIENT SITE Leon Solar LEAD Alan Morgan STAGE Proposal Presented LAST UPDATED May 22, 2021 - 10:49am UPDATED BY Alan Morgan

Form Fields Activities **Media** Crew

click to add or drop here

All media

11:14

Back Details Actions

LEAD Leon Solar - Proposal Presented - Alan Morgan -  
6440 Pagasa Pl, El Paso,...  
May 22, 2021 at 11:00 AM

Please enter a description

No voice intro. Tap to record.

Type

Prospecting

Lead

Alan Morgan

Group

Leon Solar

Stage

Proposal Presented

Scoop Prio...

Normal

Due Date

None

Start Date

None

End Date

None

Form

Activities

Media

Crew

Media Tab (Tablet and Phone)

After this step, you are done with Scoop. You will continued your ales steps with helping the customer download and understand how to use the SSL App.