SCOOP

SOLAR SMART LIVING

Training Supplement

Scoop and Sighten

Version: May 23, 2021

Summary

This Training Supplement will take you through the full contact entry, Sighten 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.

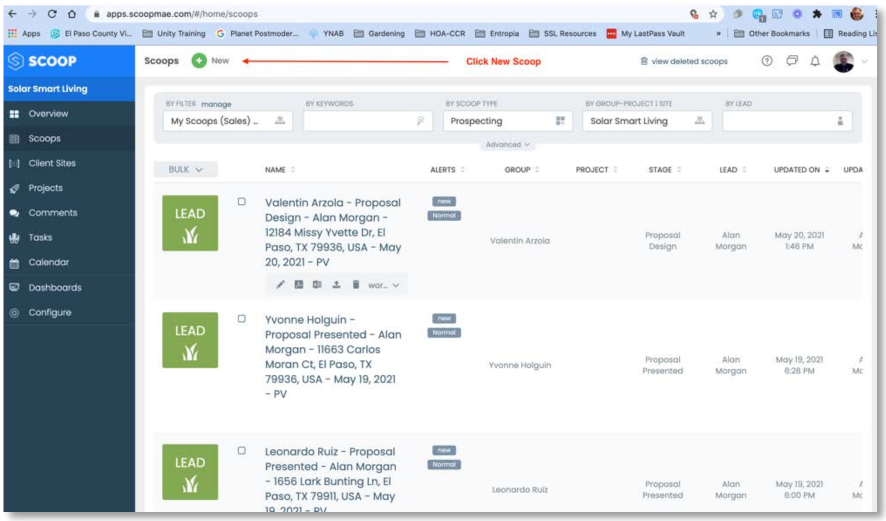


Figure 1- New Scoop – (Web Version)

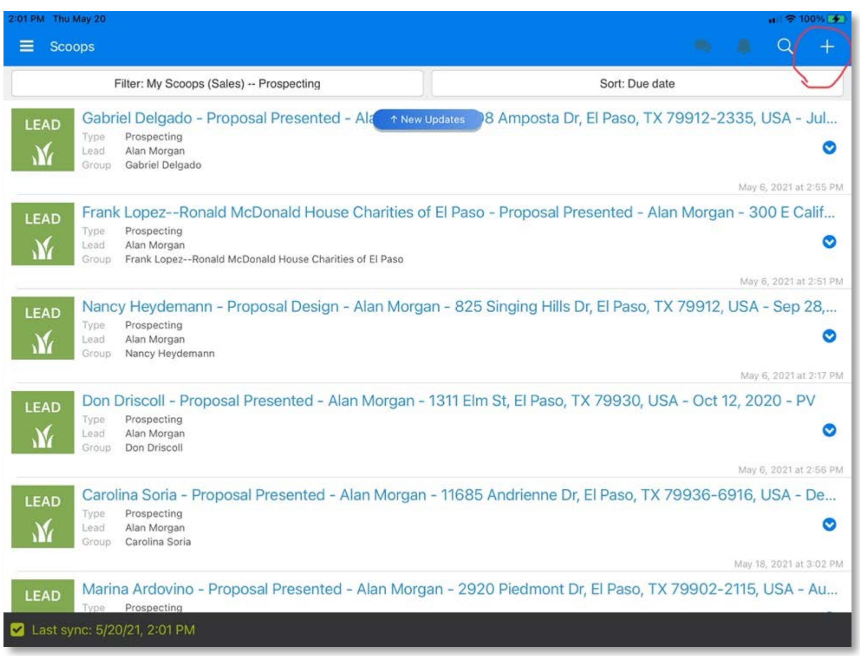


Figure 2 - New Scoop (Tablet Version)

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.

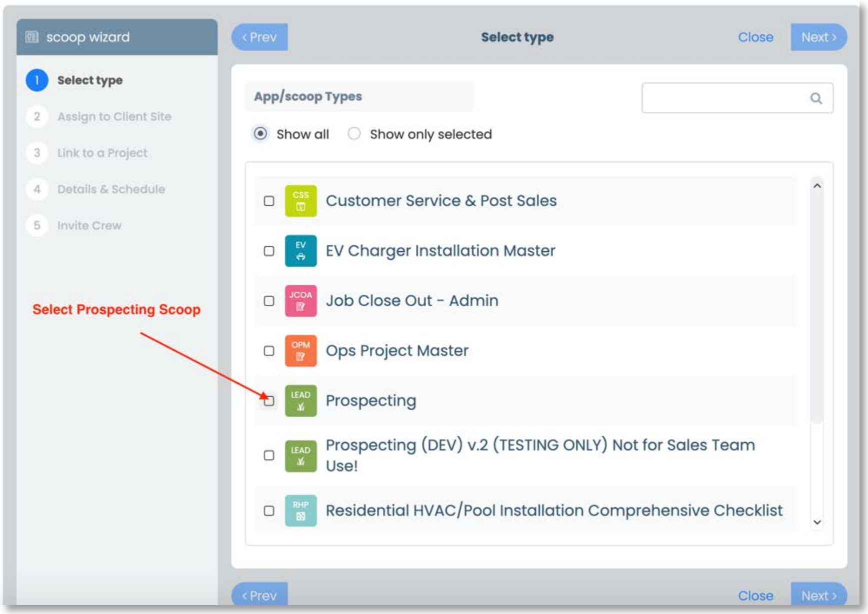


Figure 3 - Prospecting Scoop (Web Version)

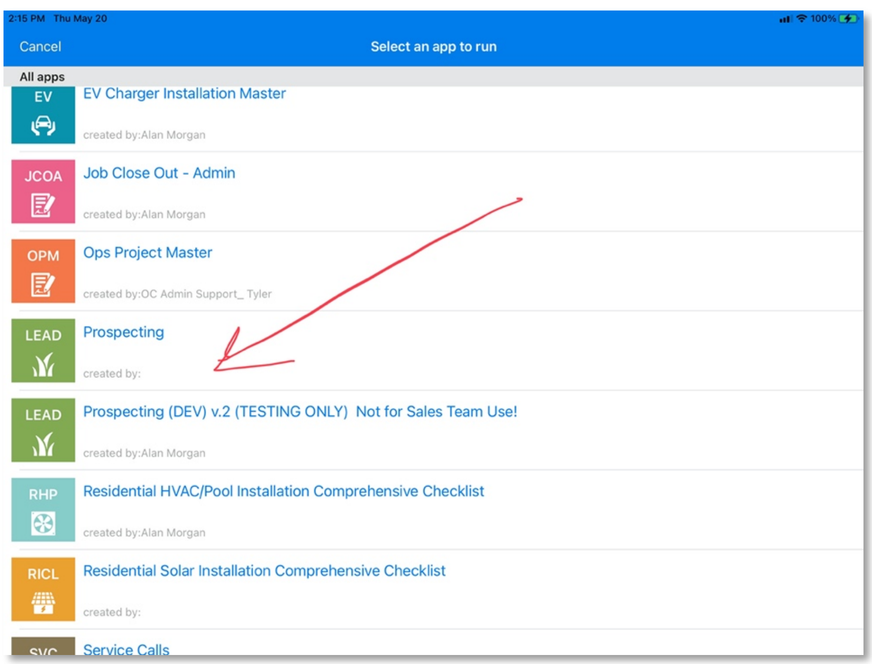


Figure 4 - Prospecting Scoop (Tablet Version)

After you select the Scoop, you will be prompted to either select and 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.”

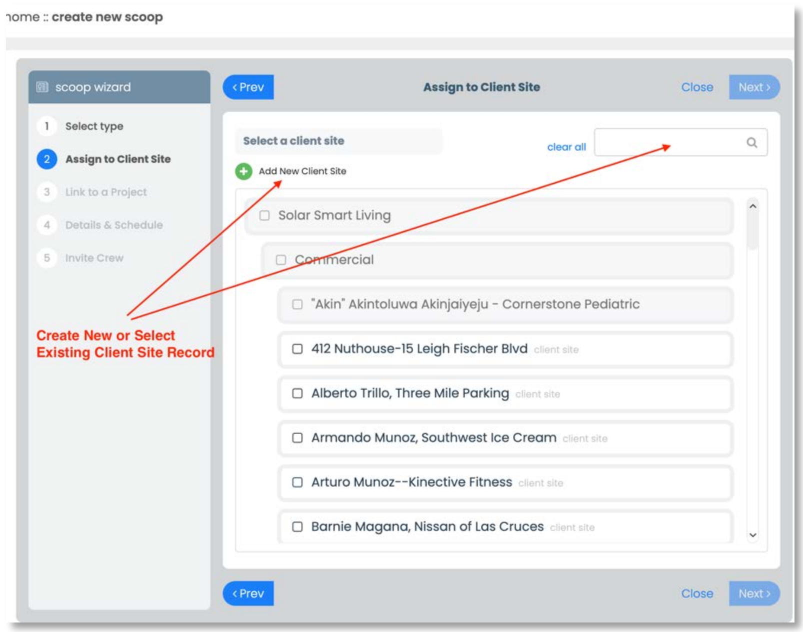


Figure 5 - Client Site (Web Version)

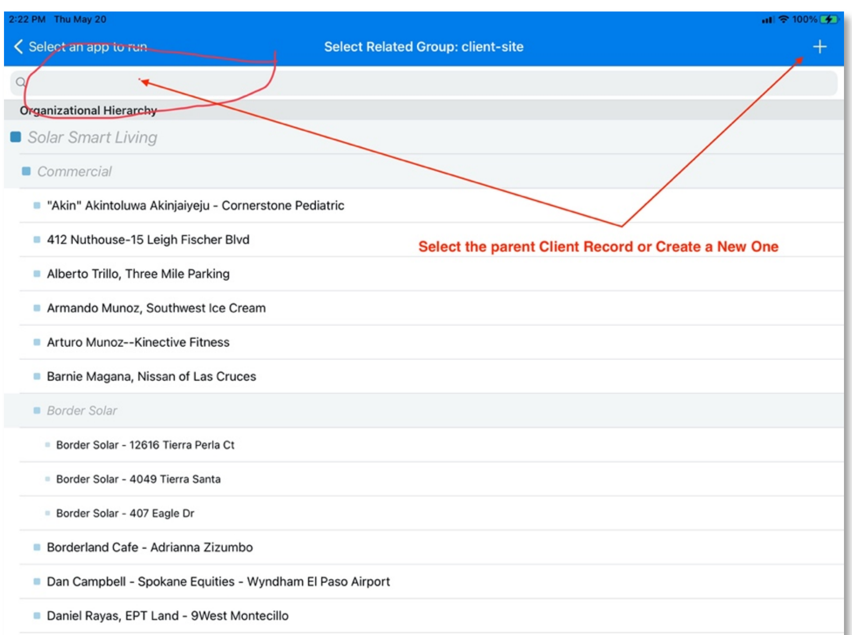


Figure 6 - Client Site (Tablet Version)

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*.

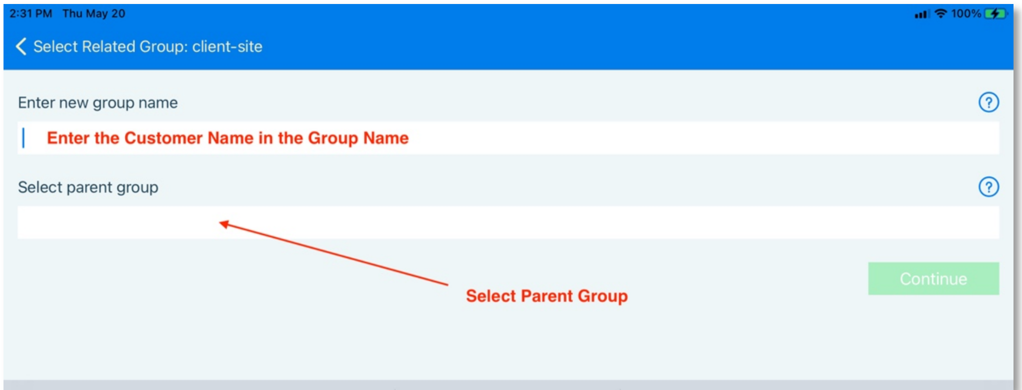


Figure 7 - Group Name (Tablet)

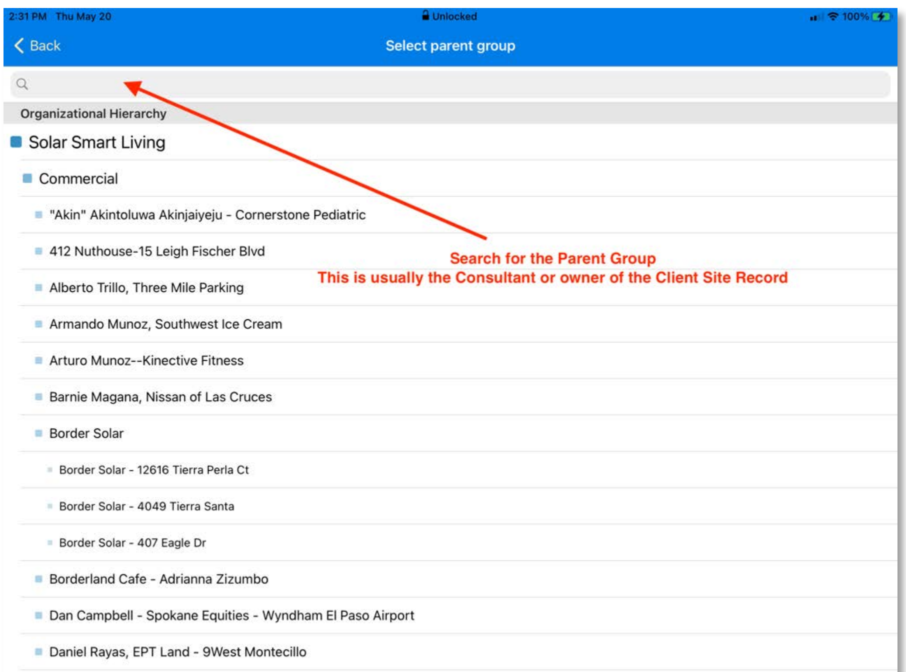


Figure 8 - Group Name (Tablet)

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

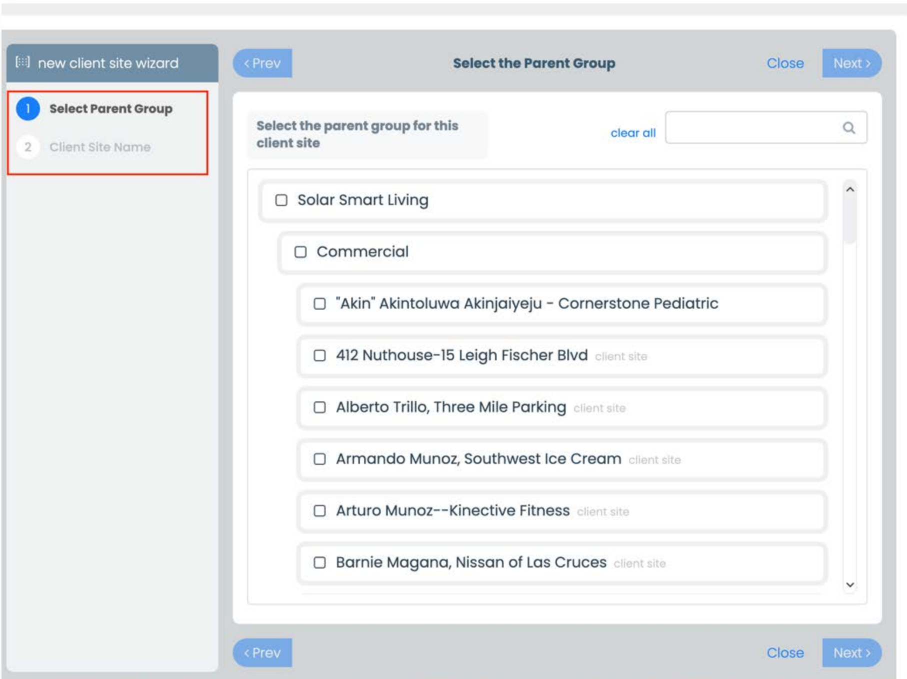


Figure 9 - Group and Parent Selection (Web)

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.*

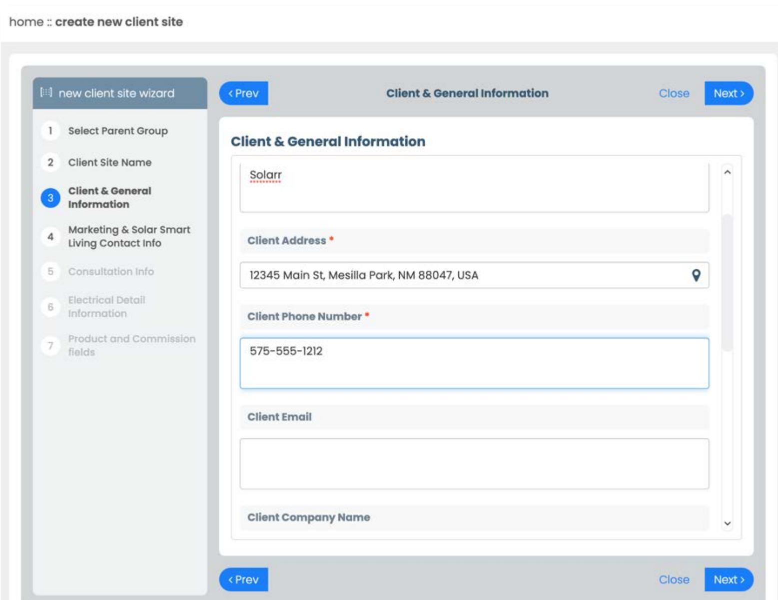


Figure 10 - Client Site Wizard (Web)

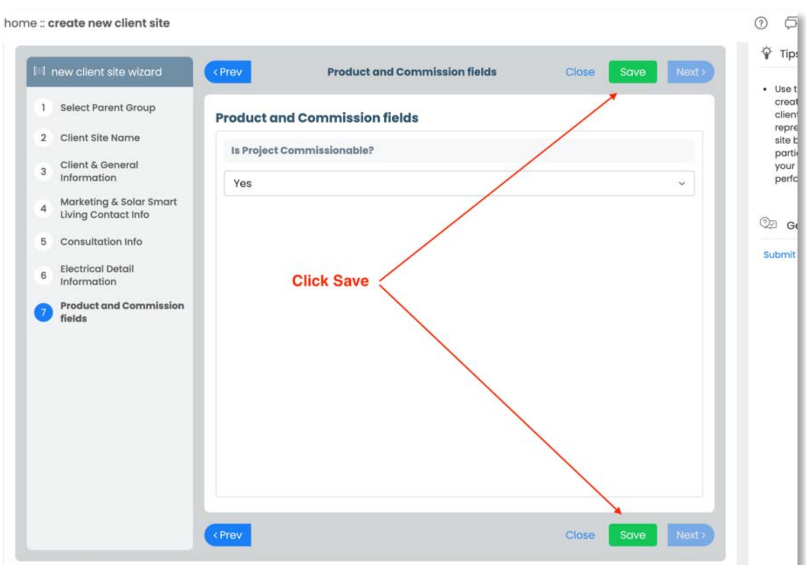


Figure 11 - Save Client Site (Web)

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.

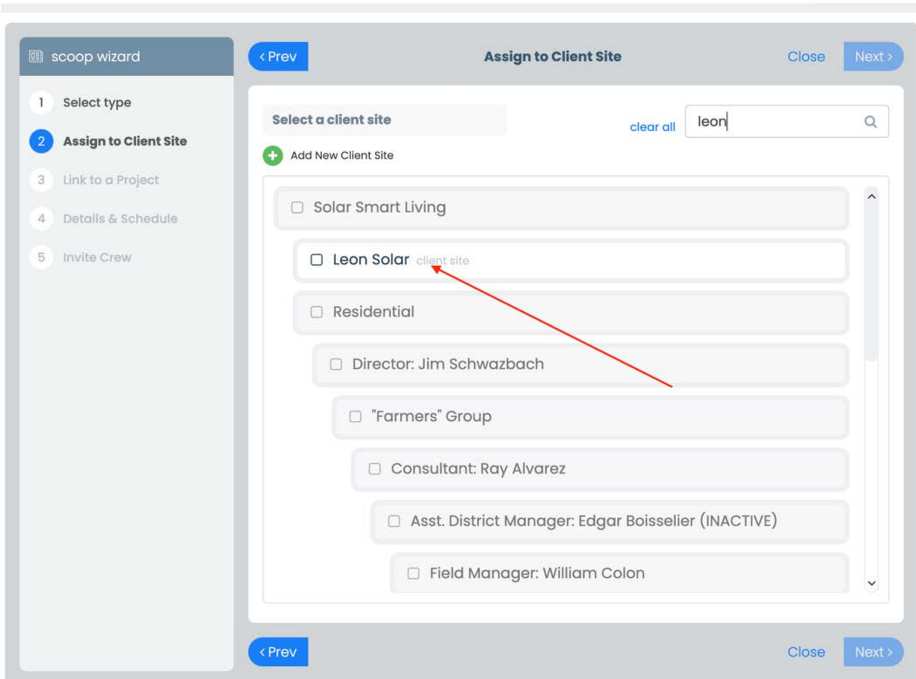


Figure 12 - Select Client Site (Web)

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

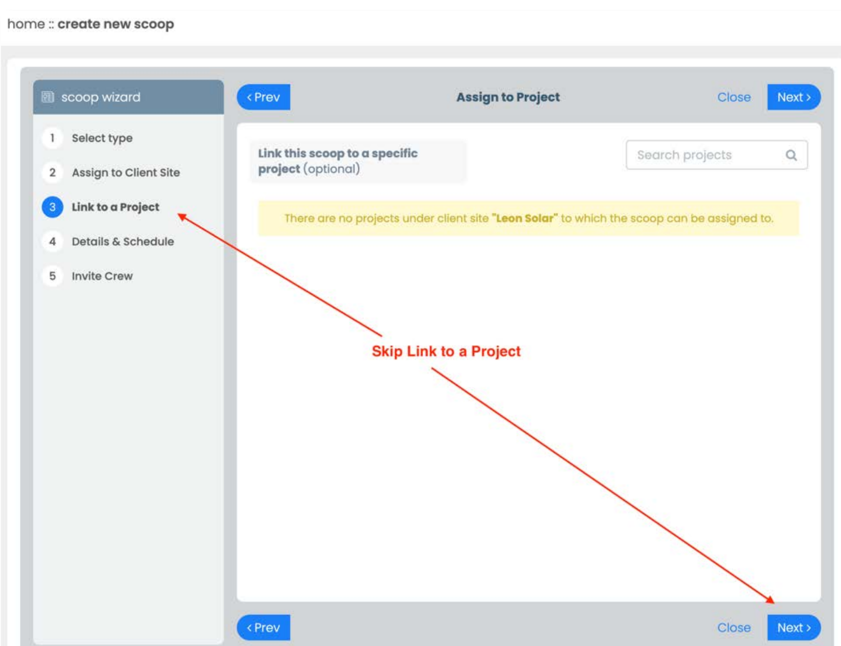


Figure 13 - Skip Project (Web)

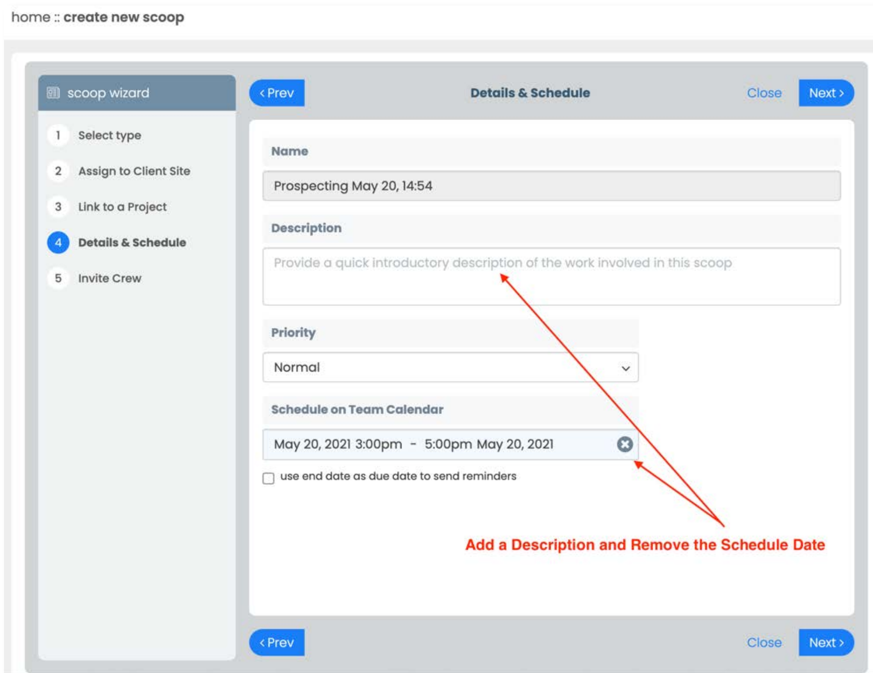


Figure 14 - Description (Web)

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.

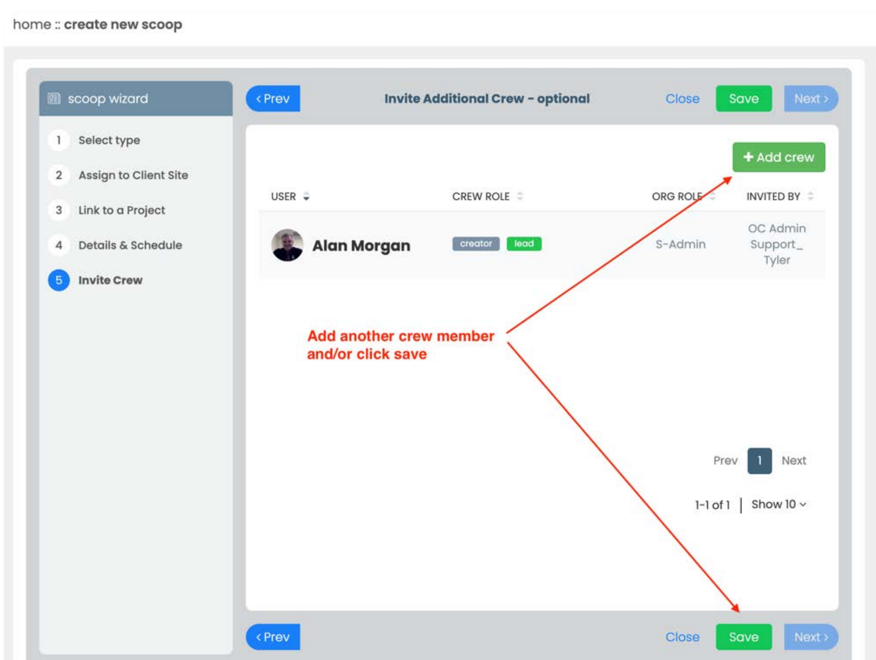


Figure 15 - Add Crew and Save (Web)

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.

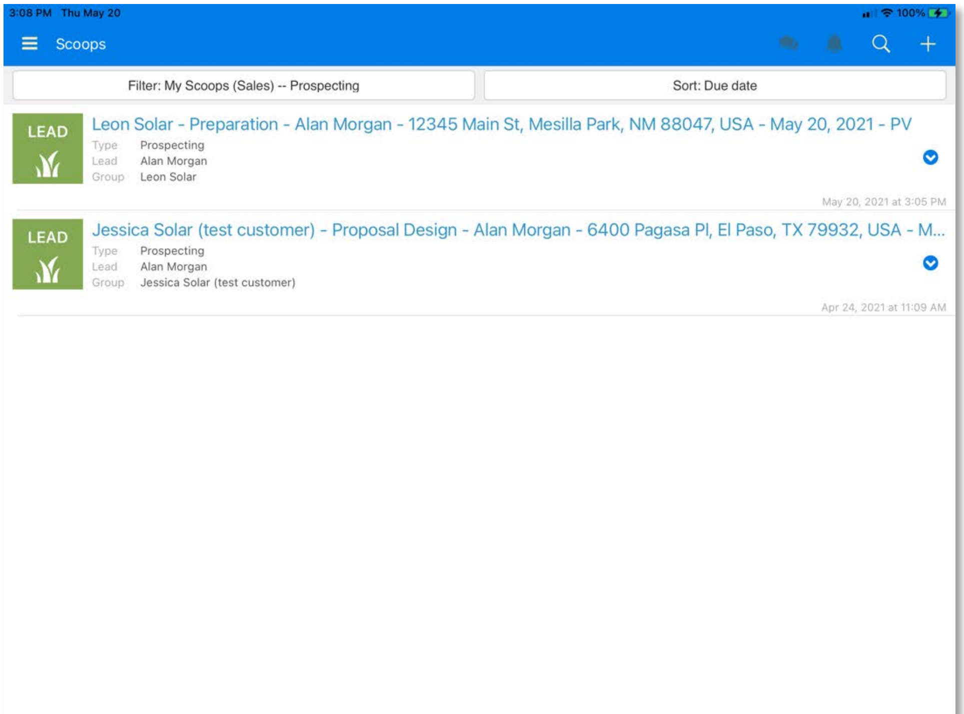


Figure 16 - Scoop List (Tablet)

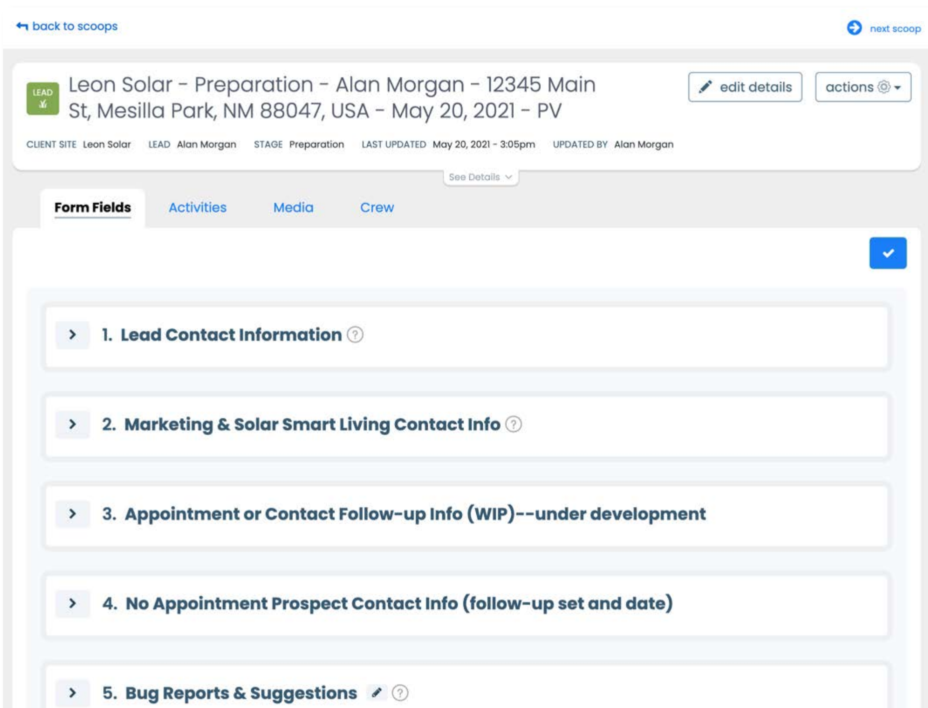


Figure 17 - Scoop Form View (Web)

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.

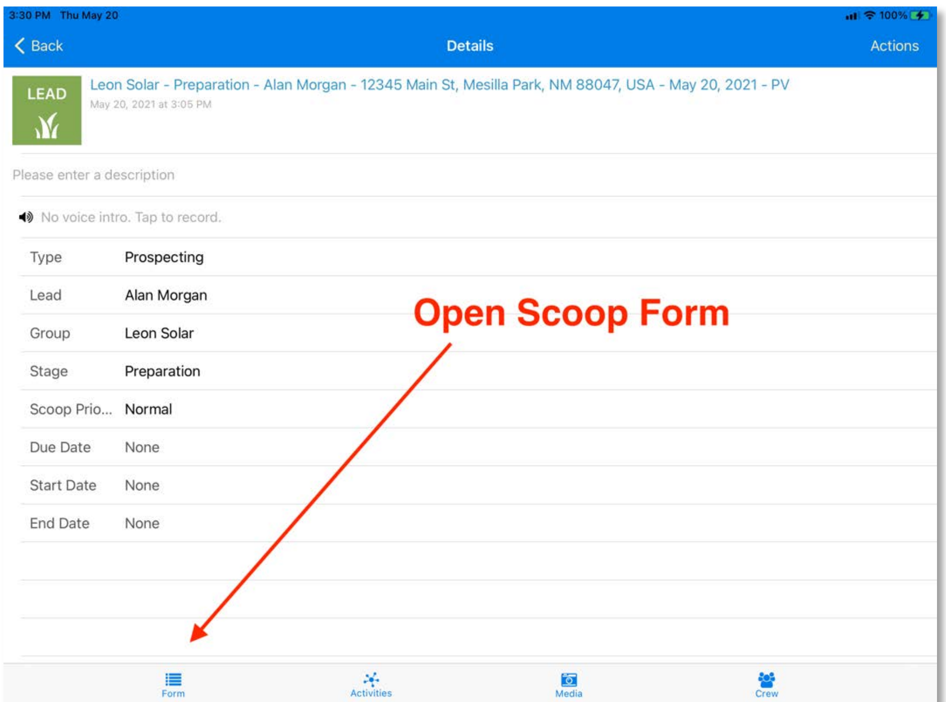


Figure 18 - Select Form (Tablet)

This will display a list of the available sections. The ones you wont 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.

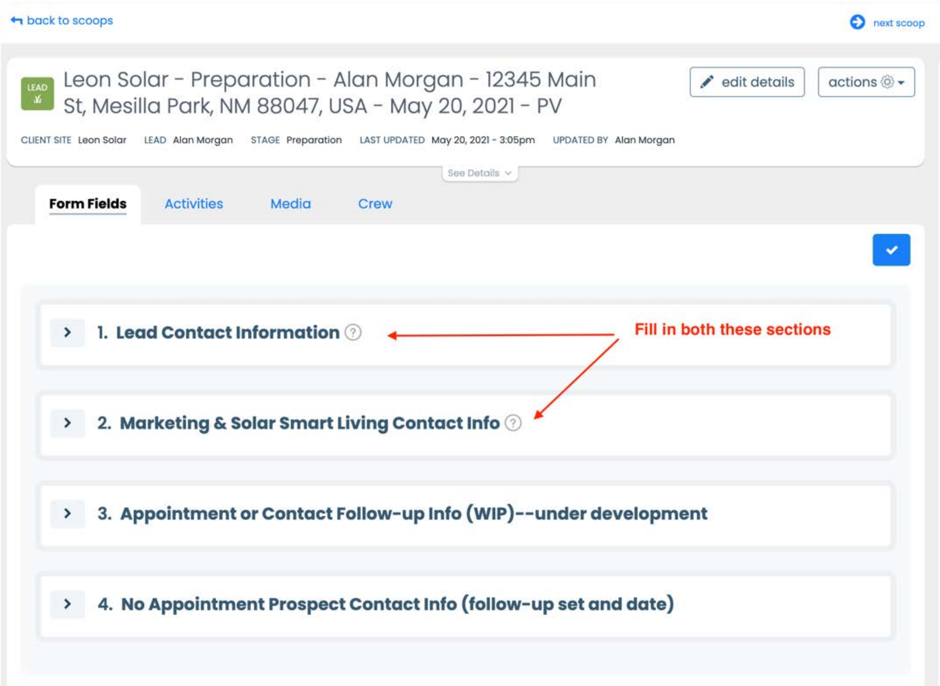


Figure 19 - Section 1 and 2 (Web)

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.

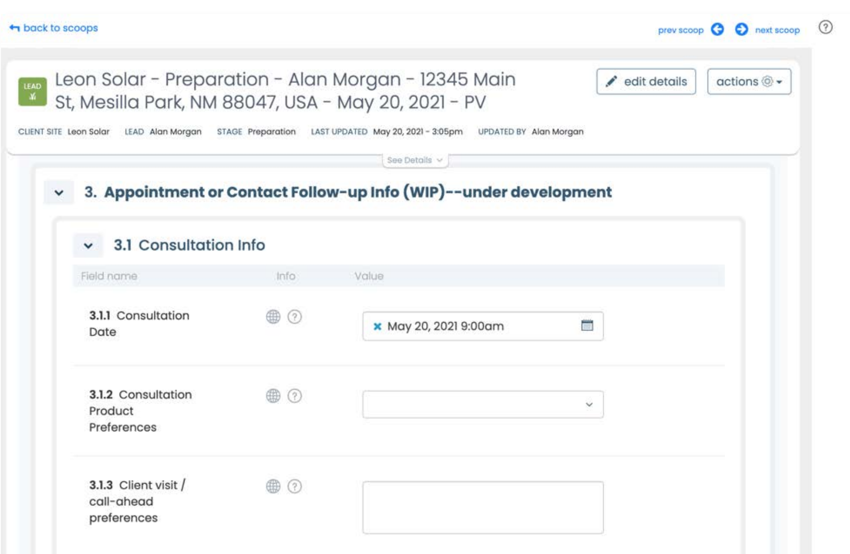


Figure 20 - Consultation (Web)

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 Sighten.

The reason filling in all of this information is so important is that it connects with Sighten 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.

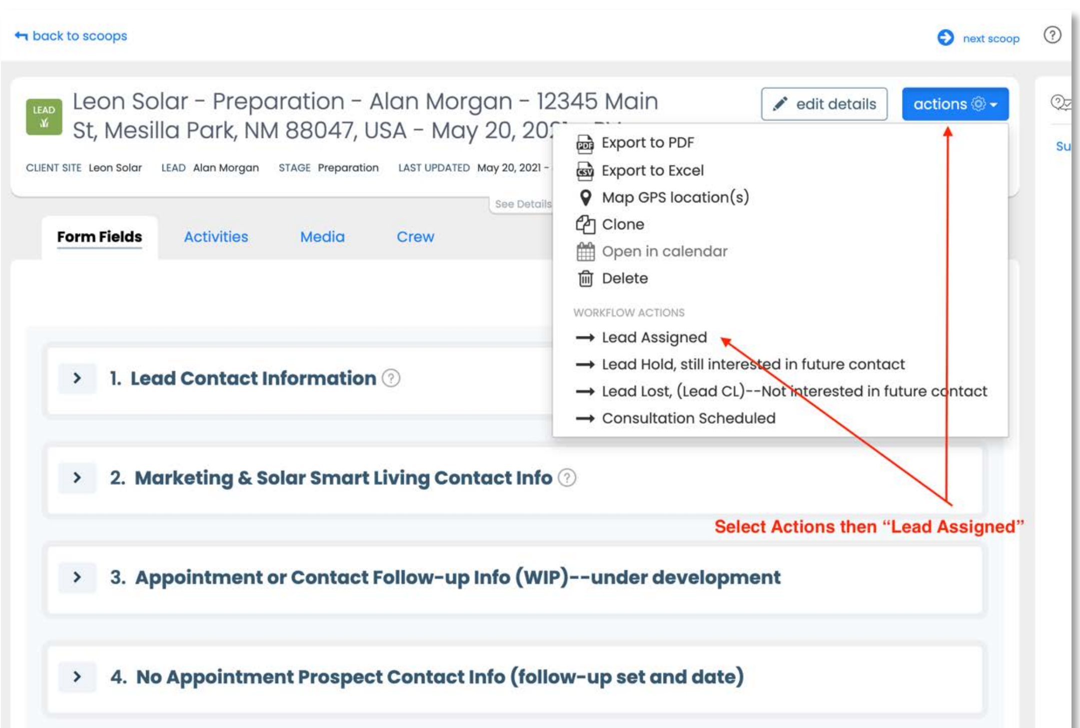


Figure 21 - Lead Assigned (Web)

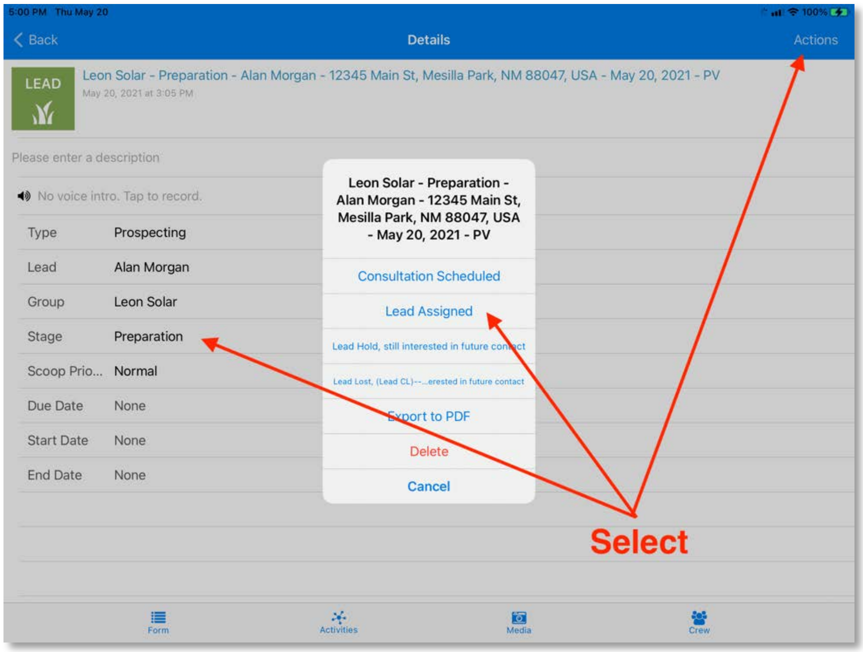


Figure 22 - Lead Assigned (Tablet)

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

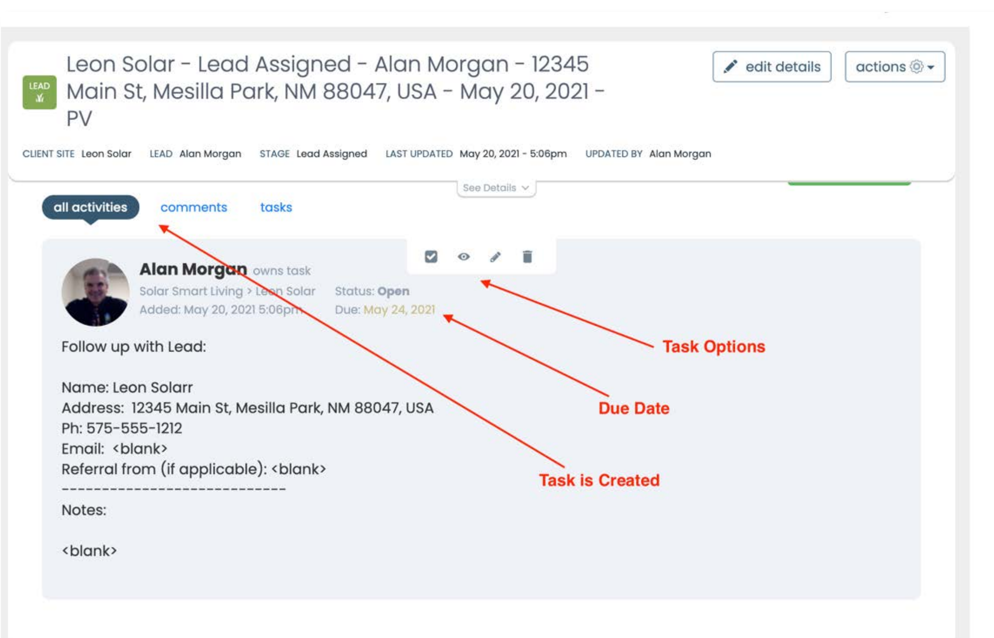


Figure 23 - Lead Assigned Task (Web)

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.

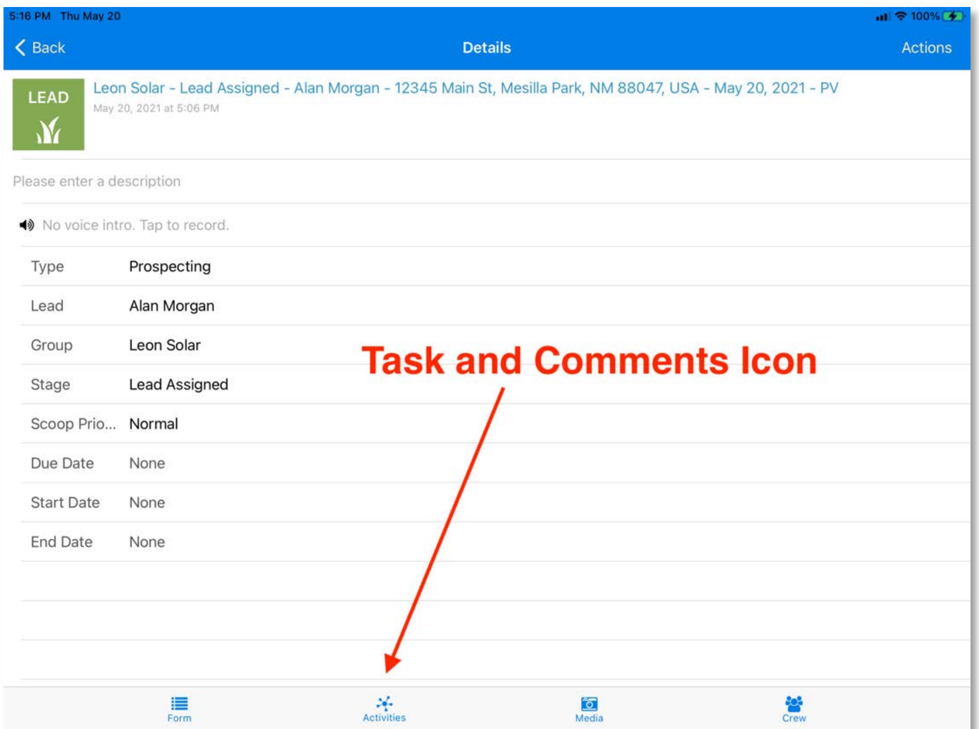


Figure 24 - Task & Comments (Tablet)

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

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 Sighten 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 Sighten could break the automated processes and create extra work for multiple people.**

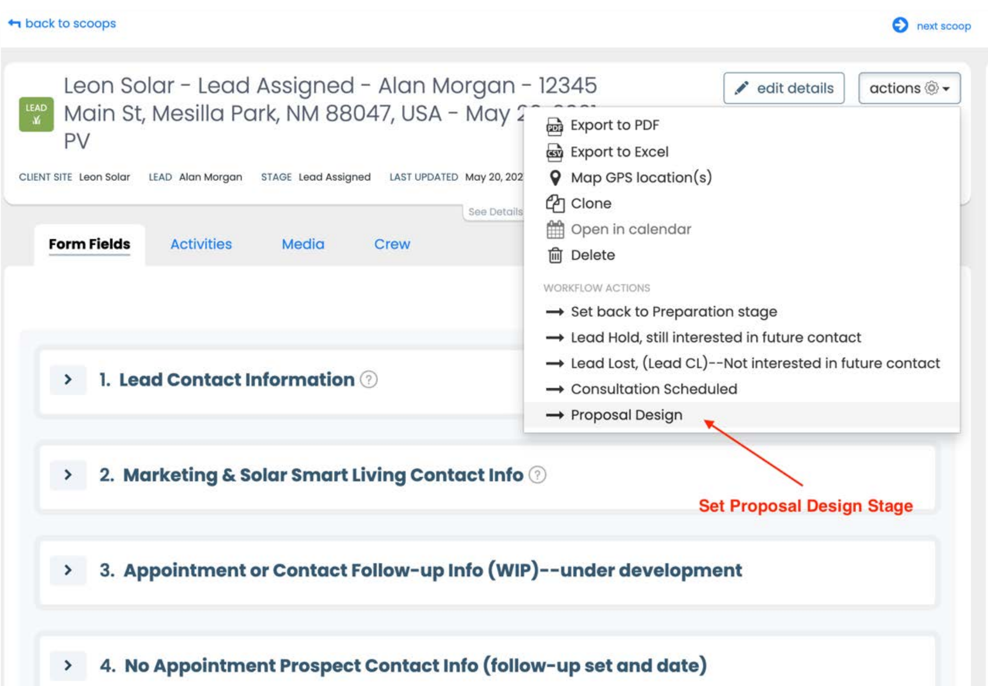


Figure 25 - Proposal Design Stage (Web)

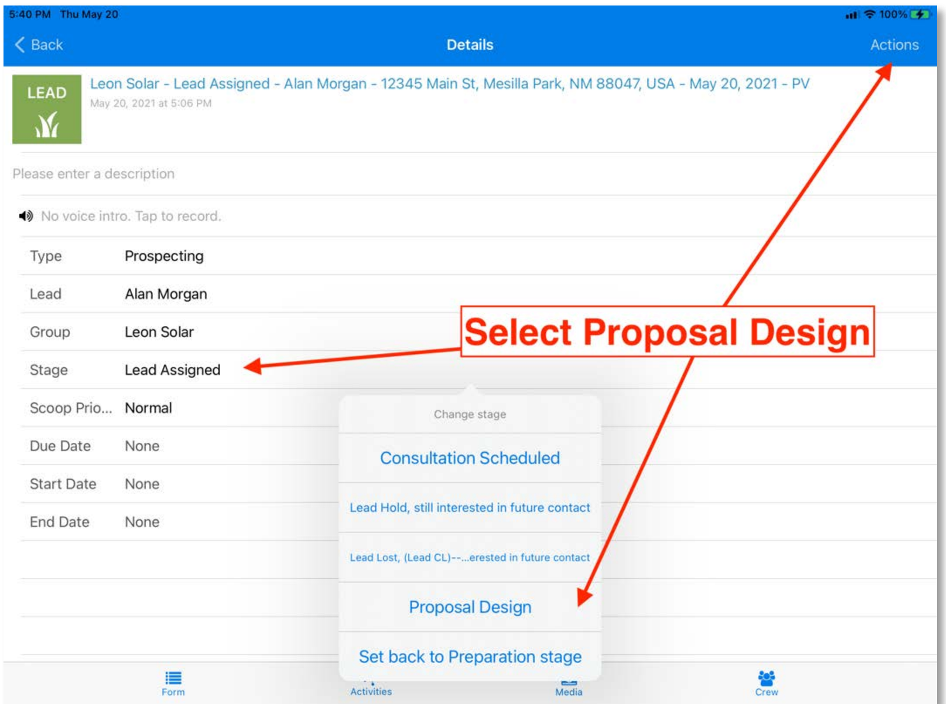


Figure 26 - Proposal Design Stage (Tablet)

Step 4 – Sighten 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 Sighten 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*

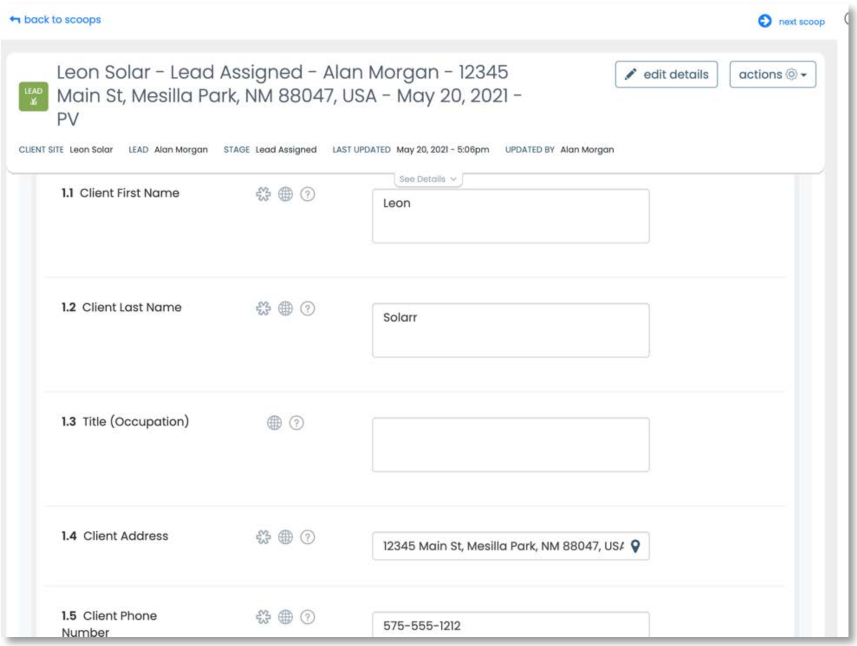


Figure 27 - Section 1 (Web)

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.

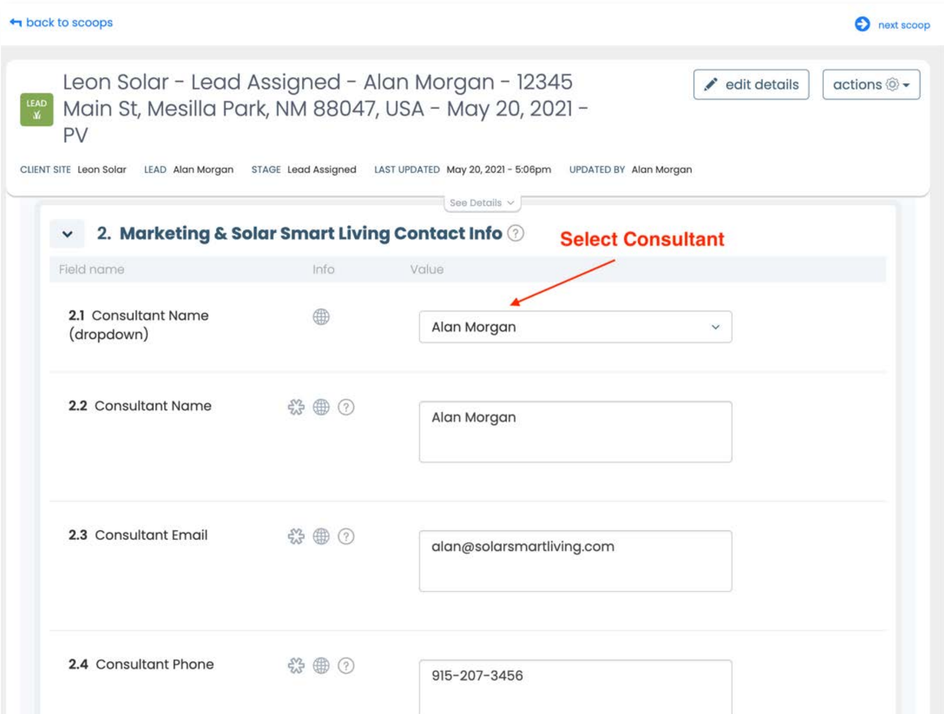


Figure 28 - Section 2 (Web)

Sign into Sighten: **https://engine.sighten.io/**

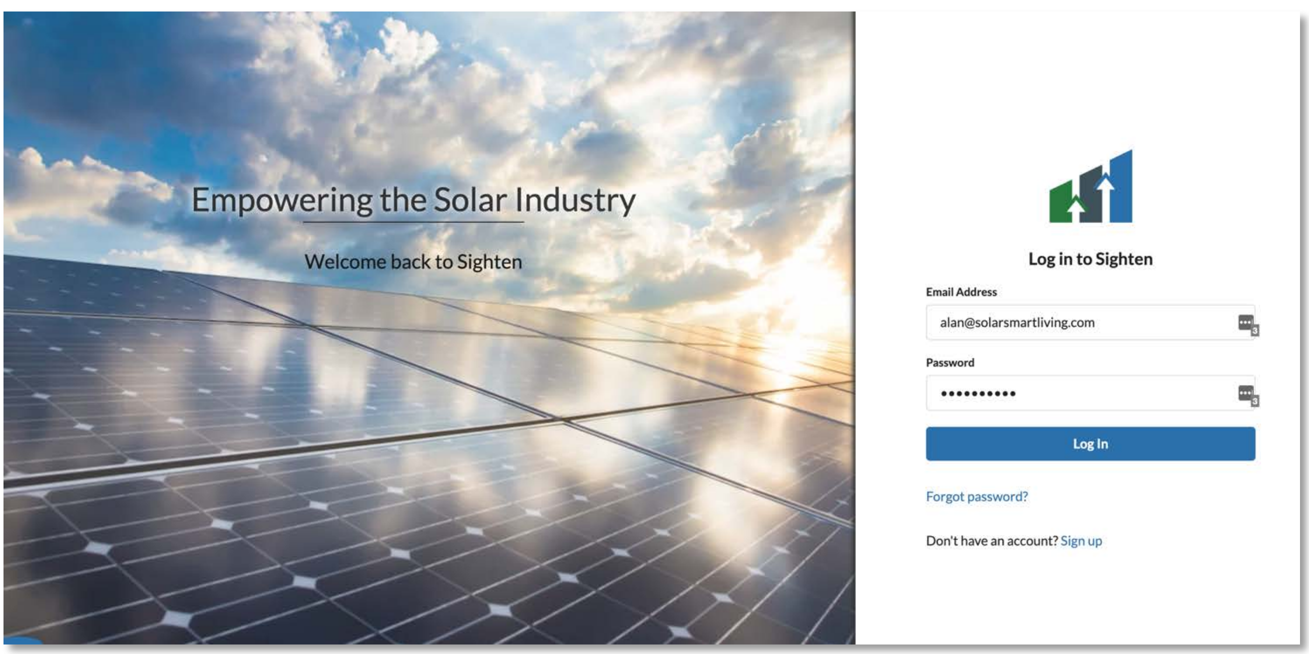


Figure 29 - Sighten Log In Screen (Web Only)

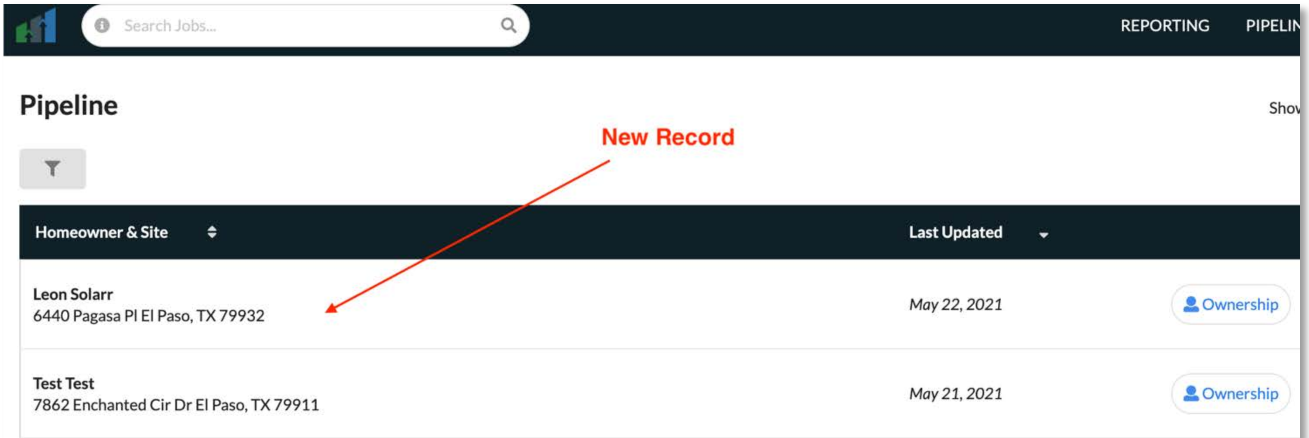


Figure 30 - Sighten Site Record List

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.

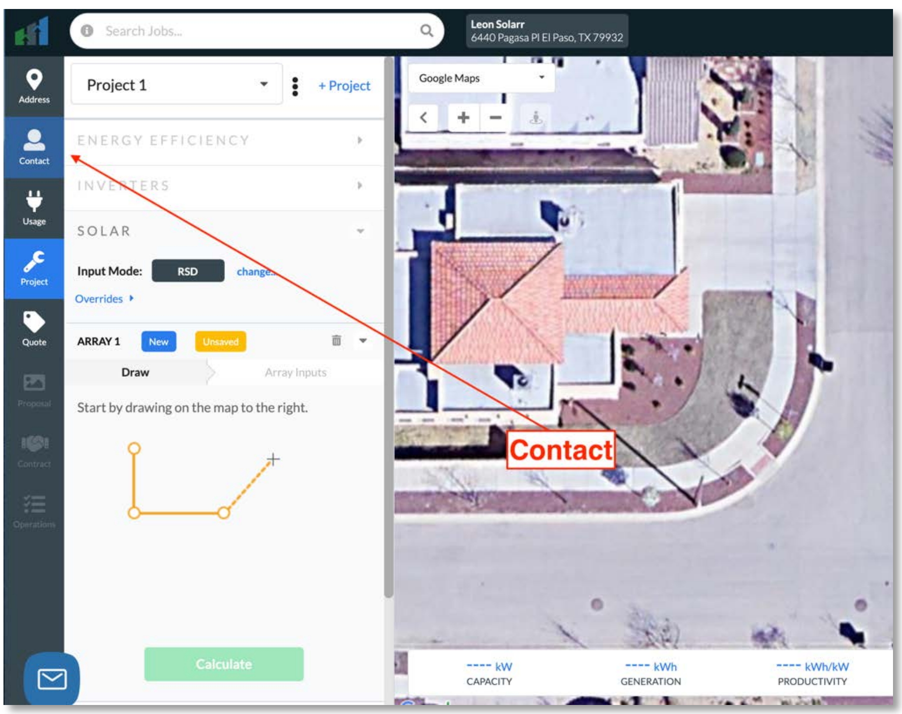


Figure 31 - Sighten Contact (Web)

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.

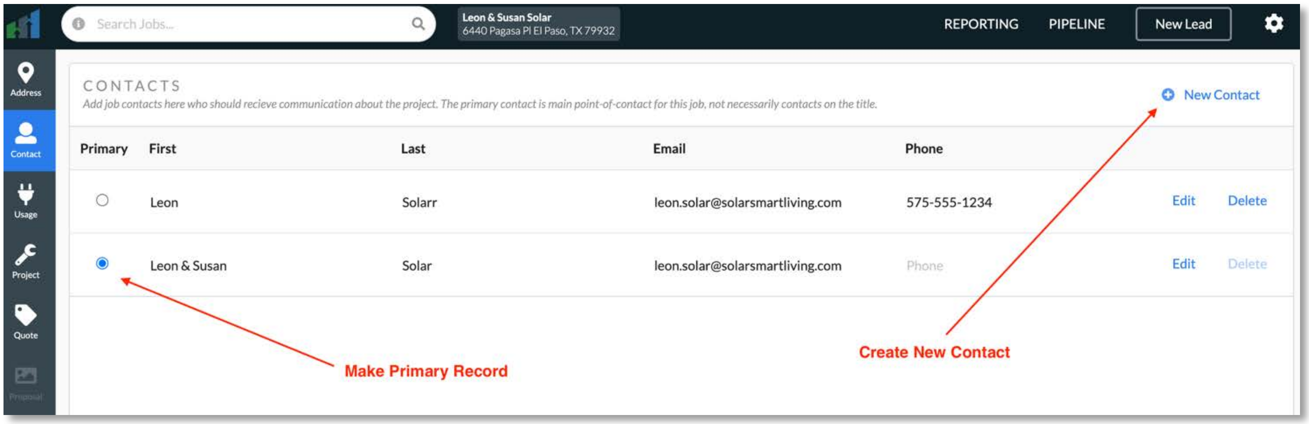


Figure 32 - Sighten Contact List

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 Sighten. Training for Sighten 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 Sighten

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

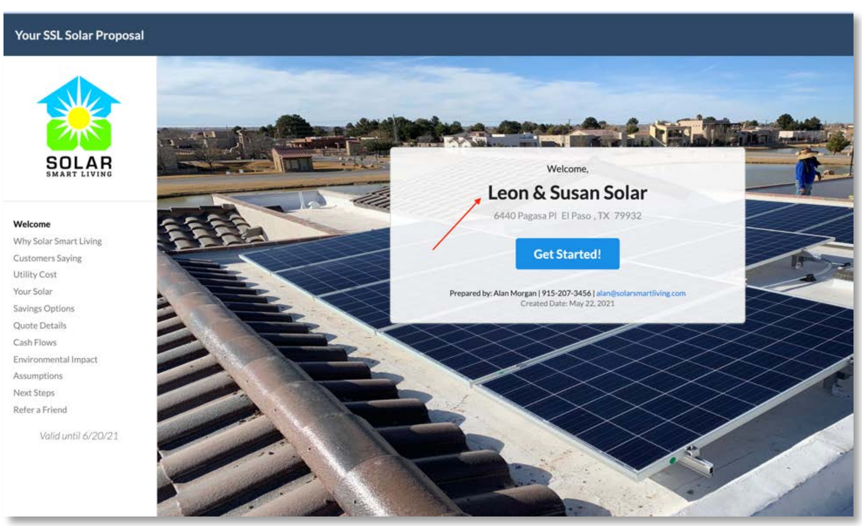


Figure 33 - Proposal Intro

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.

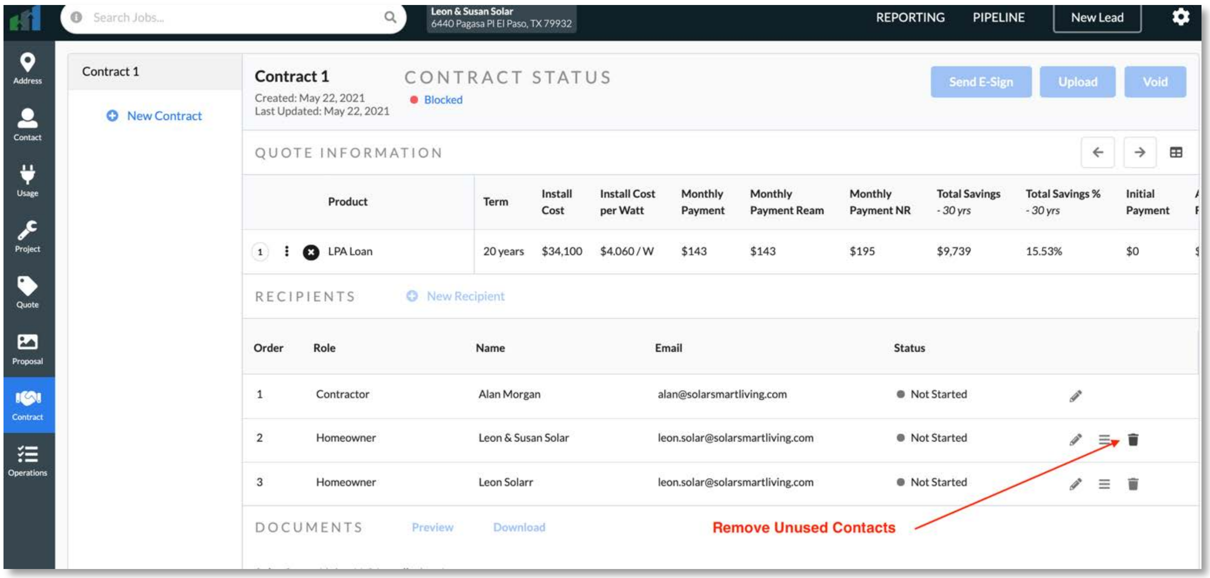


Figure 34 - Remove Unused Contacts

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.

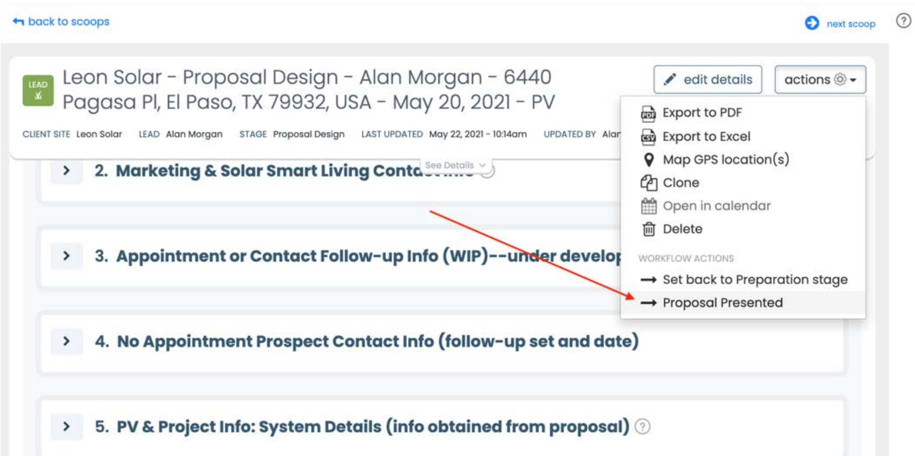


Figure 35 - Proposal Presented (Web)

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.

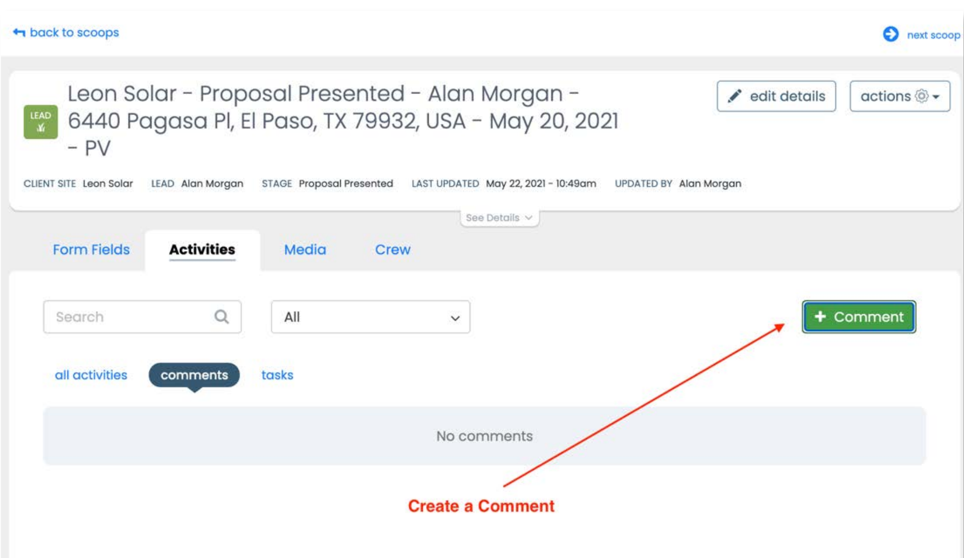


Figure 36 - Create Comment

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.

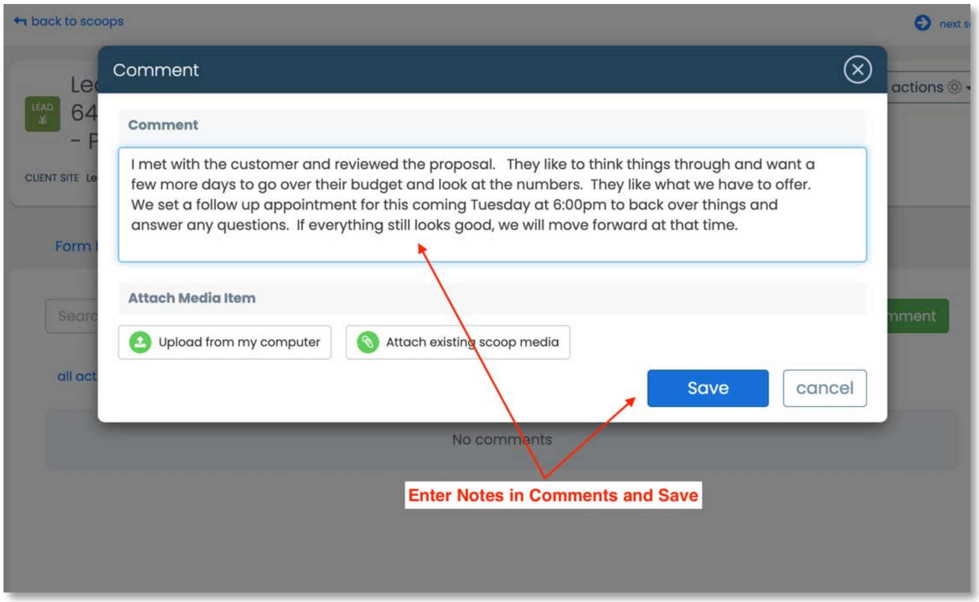


Figure 37 - Write Notes

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.

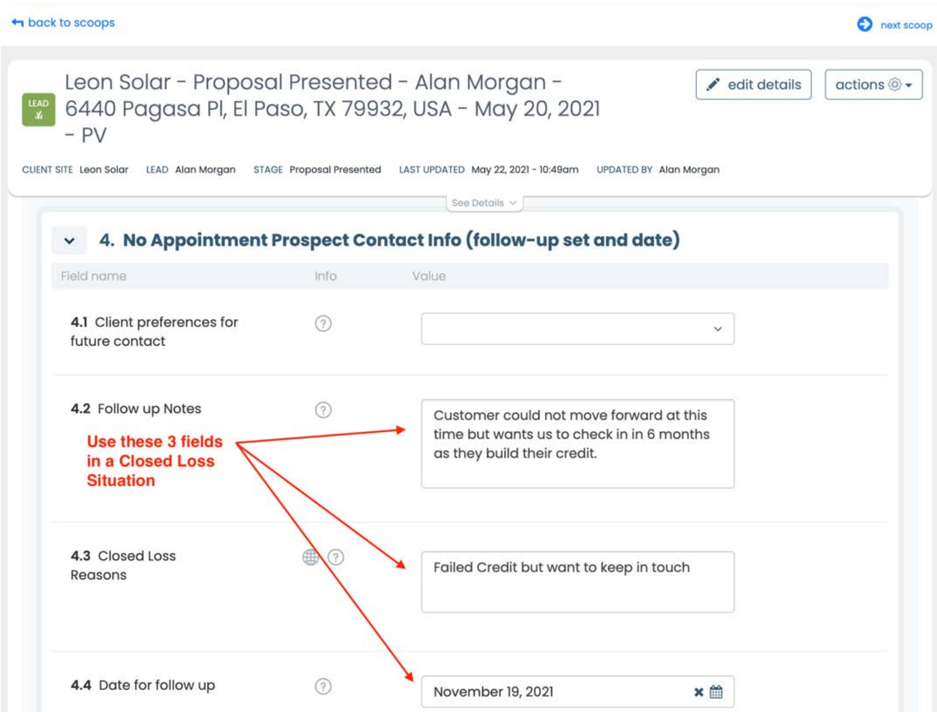


Figure 38 - Closed Loss (web)

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."

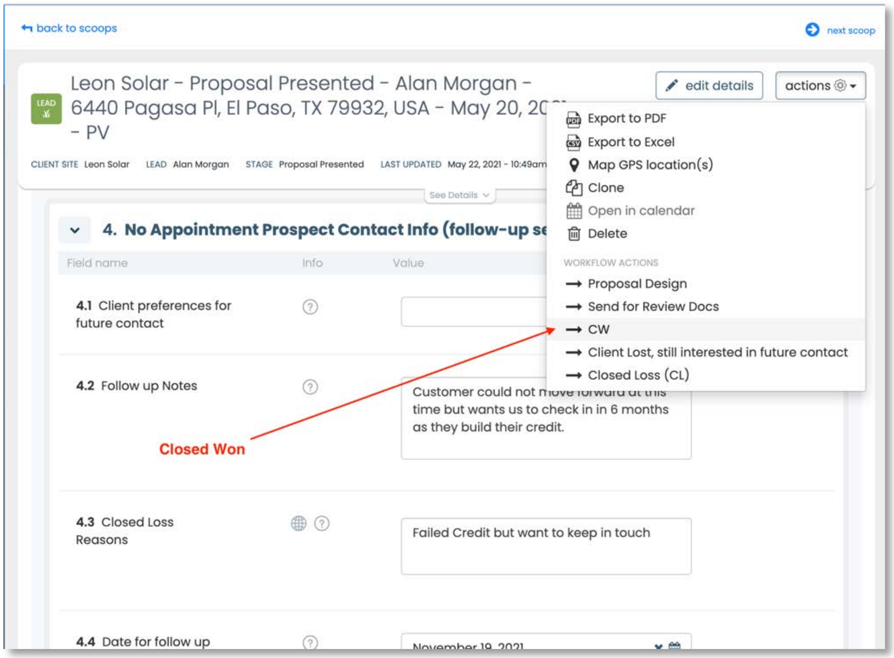


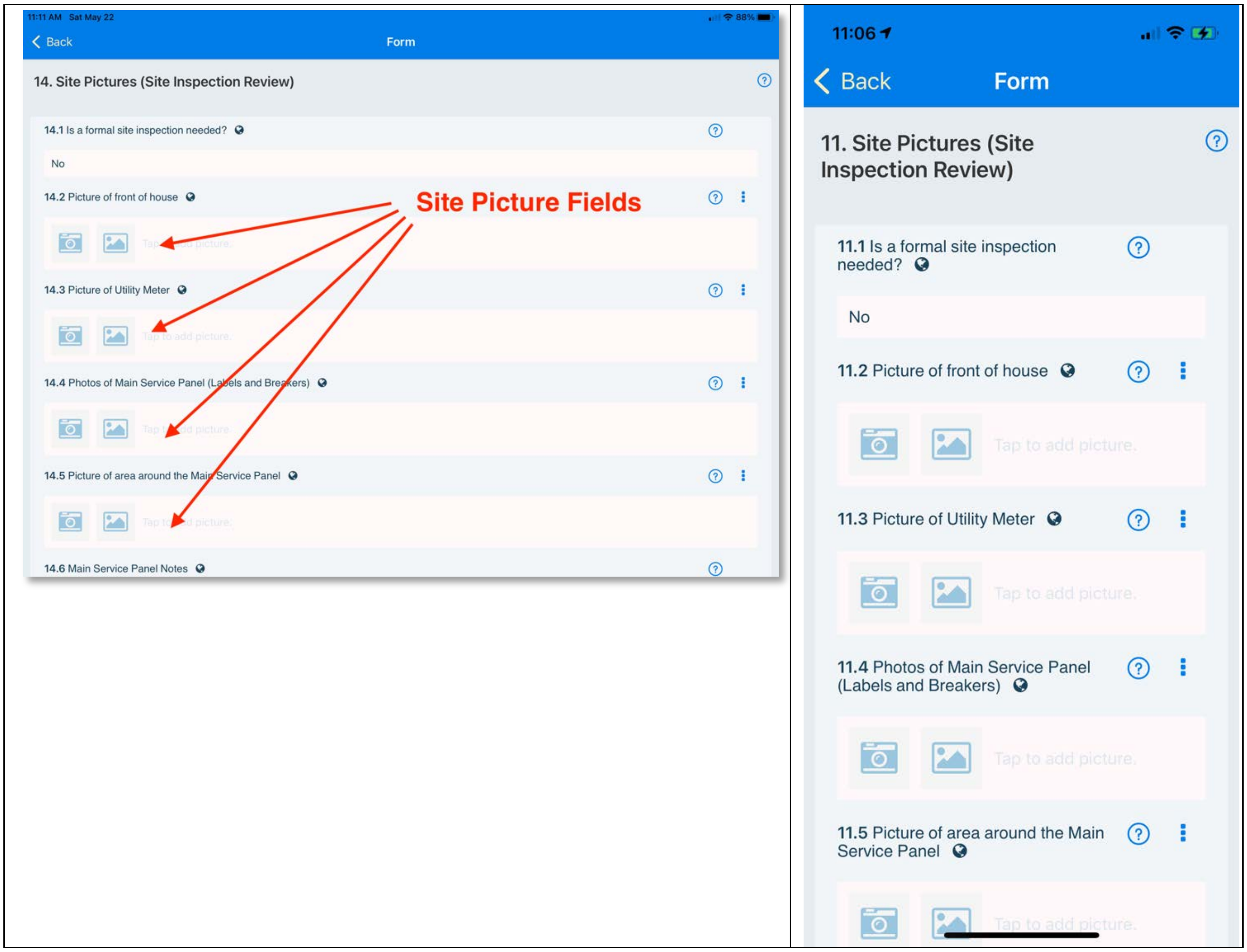
Figure 39 – CW

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. *Sighten 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

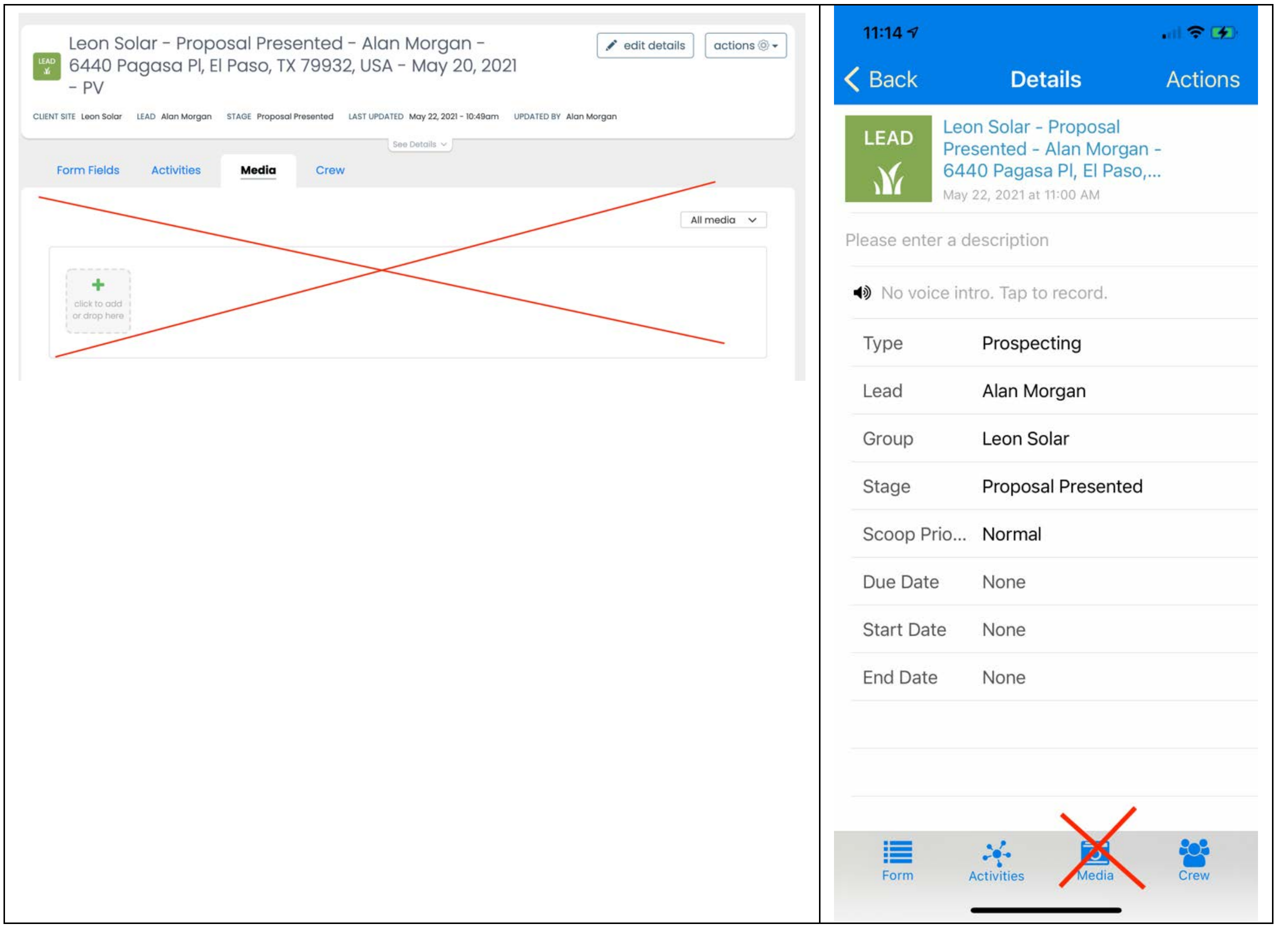
After the contract is signed, you will return to Scoop to take pictures for the Site Inspection. This is best done through your phone or tablet applications.



Site 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.**



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.