

Sales Org

1

Who: This user works for a sales org and they set appointments. They work with a lot of cold leads. They try to get leads for sales rep and set up the appointment for the sales rep to close.
Abilities: They can see if their appointments convert into installs.
Use Case: This role can create leads and appointments, and may be assigned to a specific sales rep. A setter will create a lead after visiting a homeowner as well as set the appointment so the sales rep may return and close the deal.

2

Who: This user works for a sales org and closes deals. They might also get the lead directly themselves.
Abilities: They have access to view their dashboard, leads, deals, installs, only their loan applications, design requests, agreements and installer markets.
Use Case: This role is the primary user of Enerflo. They are allowed to create leads and deals and sign contracts.

3

Who: This user works for a sales org and is in charge of sales reps.
Abilities: They can see any sales reps assigned to them within their office, all the leads, deals, installs and install markets.
Use Case: Sales managers are also a view specific role allowing them to see what leads, deals and installs their assigned reps are working on.

4

Who: This user is the sales manager's boss.
Abilities: They have access to multiple offices within a region, can see all the leads (and reassign a lead), deals, scheduling, installs and users within that region.
Use Case: This role mostly consists of viewing leads, deals and installs as well as lead routing.

5

Who: This user has a similar role as the company admin but only in the designated office.
Abilities:

- They have the ability to view office leads, deals, tasks, scheduling, loan application, installs and manage users and basic office settings.
- They can add/remove roles for sales reps and setters.

Use Case: Can edit office specific settings like the office logo, address, phone number and link a Google calendar specific to their office.

6

Who: This user is part of a sales org. They do cold lead calls and they set up appointments for a setter or a closer (sales rep) for either deals or installs.
Abilities: They have access to the company leads, deals, the schedule, installs, and the install tracker.
Use Case: Similar to the "Setter" role but works in an office.

7

Who: This user is part of a sales org. They manage the "Call Center" users.
Abilities: They have access to the company leads, deals, the schedule, installs, and the install tracker.
Use Case: Same as "Call Center" role with differentiating name.

8

Who: This user sets appointments for sales reps.
Abilities:

- They have access to the entire lead list and schedule of the company.
- They can create new leads and edit existing ones.

Use Case: Sets appointments with homeowners throughout the country.

Sales Org	Hybrid	EPC
Setter 1	Solar Designs 9	Deal Approval 13
Sales Rep 2	Site Surveyor 10	Solar Installer 14
Sales Rep Manager 3	Company Admin 11	Operations 15
Regional Manager 4	Super Admin 12	Project Manager 16
Office Admin 5		
Call Center 6		
Call Center Manager 7		
Scheduler 8		

9

Who: This user creates the design & image of the solar panels on the roof. They will let you know how many modules can fit on the house.
Abilities:

- They can see the design que.
- They can assign design and upload/replace design data

Use Case: Assigned a deal which they then design for.

10

Who: This user takes roof measurements and pictures of the house and the electrical.
Abilities: They can see their survey schedule and site surveys.
Use Case: Completes Enerflo created Site Surveys to pass onto their company's Ops team.

11

Who: This can be a sales org or an EPC user. There are many types of users in an org that could work as a company admin, such as from the permit, technical project management, and accounting departments.
Abilities:

- This user has access to viewing and editing all data within Enerflo.
- They can also configure EPC settings if they're in an EPC.
- They can add/remove any role (except for the super admin role).

Use Case: Company Admin may add/remove/disable/enable markets in the EPC settings page.

12

Who: This is an EPC, all-access role.
Abilities:

- The only user with cloak in ability.
- It provides full access to all of the Enerflo account settings.
- The only user that can change company settings, reconfigure milestones, or edit product pricing.
- This user has access to add/remove settings that other roles do not have access to including the Sales Company settings.

Use Case: Super Admin can delete appointment types because they have access to the "Sales Company Settings" page. No other users have access to this page.

13

Who: This is an added role to the EPC to allow specific users to approve/deny contracts.
Abilities: They have access to contracts to approve/deny.
Use Case: Allow specific user access to deal approval without giving that user company or office admin privileges.

14

Who: This is an EPC user who doesn't utilize Enerflo other than to track where the installs are.
Abilities:

- They can view the install tracker for assigned installs and the install form summary.
- They can schedule solar install.

Use Case: In Enerflo a solar installer may complete an "Install Survey".

15

Who: This user is part of the Installer/EPC and can view all solar installs & projects.
Abilities: They can view all ongoing installs & projects (post agreement signing).
Use Case: Management of all company projects.

16

Who:

- This user tracks the deal from signed agreement to PTO (permission to operate).
- They make sure that the permits and other processes get done in timely manner for the install.

Abilities:

- They can view the install tracker and tasks.
- They can track the assigned deals and installs.
- They can update fields, change milestones, make notes and upload documents.

Use Case: Manage projects and communicates with sales rep about issues related to the agreement/install. This role typically handles everything post-agreement signing.

Hybrid / EPC