

Role	Description
<b>ADMINS</b>	
<b>Super Admin</b>	<p><b>Who:</b> EPC and Sales Org. users can be assigned this role.</p> <p><b>Abilities:</b></p> <ul style="list-style-type: none"> <li>- The only user with cloak in ability (Legacy platform only).</li> <li>- It provides full access to all of the Enerflo account settings.</li> <li>- The only user that can change company settings, reconfigure milestones, or edit product pricing.</li> <li>- This user has access to add/remove settings that other roles do not have access to including the Sales Company settings.</li> </ul> <p><b>Use Case:</b> Super Admin can delete appointment types because they have access to the "Sales Company Settings" page. No other users have access to this page.</p>
<b>Company Admin</b>	<p><b>Who:</b></p> <ul style="list-style-type: none"> <li>- This can be a sales org or an EPC user.</li> <li>- 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.</li> </ul> <p><b>Abilities:</b></p> <ul style="list-style-type: none"> <li>- This user has access to viewing and editing all data within Enerflo.</li> <li>- They can also configure EPC settings if they're in an EPC.</li> <li>- They can add/remove any role (except for the super admin role).</li> </ul> <p><b>Use Case:</b> Company Admin may add/remove/disable/enable markets in the EPC settings page.</p>
<b>Office Admin</b>	<p><b>Who:</b> This user has a similar role as the company admin but only in the designated office.</p> <p><b>Abilities:</b></p> <ul style="list-style-type: none"> <li>- They have the ability to view office leads, deals, tasks, scheduling, loan application, installs and manage users and basic office settings.</li> <li>- They can add/remove roles for sales reps and setters.</li> </ul> <p><b>Use Case:</b> Can edit office specific settings like the office logo, address, phone number and link a Google calendar specific to their office.</p>
<b>Regional Manager</b>	<p><b>Who:</b> This user is the sales manager's boss.</p> <p><b>Abilities:</b> 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.</p> <p><b>Use Case:</b> This role mostly consists of viewing leads, deals and installs as well as lead routing.</p>
<b>Deal Approval</b>	<p><b>Who:</b> This is an added role to the EPC to allow specific users to approve/deny contracts.</p> <p><b>Abilities:</b> They have access to contracts to approve/deny.</p> <p><b>Use Case:</b> Allow specific user access to deal approval without giving that user company or office admin privileges.</p>
<b>SALES</b>	
<b>Sales Rep Manager</b>	<p><b>Who:</b> This user works for a sales org and is in charge of sales reps.</p> <p><b>Abilities:</b> They can see any sales reps assigned to them within their office, all the leads, deals, installs and install markets.</p> <p><b>Use Case:</b> Sales managers are also a view specific role allowing them to see what leads, deals and installs their assigned reps are working on.</p>
<b>Sales Rep</b>	<p><b>Who:</b> This user works for a sales org and closes deals. They might also get the lead directly themselves.</p> <p><b>Abilities:</b> They have access to view their dashboard, leads, deals, installs, only their loan applications, design requests, agreements and installer markets.</p> <p><b>Use Case:</b> This role is the primary user of Enerflo. They are allowed to create leads and deals and sign contracts.</p>
<b>Setter</b>	<p><b>Who:</b> 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.</p> <p><b>Abilities:</b> They can see if their appointments convert into installs.</p> <p><b>Use Case:</b> 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.</p>
<b>Call Center</b>	<p><b>Who:</b> 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.</p> <p><b>Abilities:</b> They have access to the company leads, deals, the schedule, installs, and the install tracker.</p> <p><b>Use Case:</b> Similar to the "Setter" role but works in an office.</p>
<b>Call Center Manager</b>	<p><b>Who:</b> This user is part of a sales org. They manage the "Call Center" users.</p> <p><b>Abilities:</b> They have access to the company leads, deals, the schedule, installs, and the install tracker.</p> <p><b>Use Case:</b> Same as "Call Center" role with differentiating name.</p>
<b>Scheduler</b>	<p><b>Who:</b> This user sets appointments for sales reps.</p> <p><b>Abilities:</b></p> <ul style="list-style-type: none"> <li>- They have access to the entire lead list and schedule of the company.</li> <li>- They can create new leads and edit existing ones.</li> </ul> <p><b>Use Case:</b> Sets appointments with homeowners throughout the country.</p>
<b>Install</b>	
<b>Operations</b>	<p><b>Who:</b> This user is part of the Installer/EPC and can view all solar installs &amp; projects.</p> <p><b>Abilities:</b> They can view all ongoing installs &amp; projects (post agreement signing).</p> <p><b>Use Case:</b> Management of all company projects.</p>
<b>Site Surveyor</b>	<p><b>Who:</b> This user takes roof measurements and pictures of the house and the electrical.</p> <p><b>Abilities:</b> They can see their survey schedule and site surveys.</p> <p><b>Use Case:</b> Completes Enerflo created Site Surveys to pass onto their company's Ops team.</p>
<b>Sub Contractor</b>	<p><b>Who:</b></p> <ul style="list-style-type: none"> <li>- This is a flexible role, so the user can be an electrician for electrical review, inspectors for roof inspection, plumbers, carpenters, etc.</li> <li>- This role is most similar to the Site Surveyor.</li> </ul> <p><b>Abilities:</b></p> <ul style="list-style-type: none"> <li>- They have similar rights to the site surveyor in that they only have access to surveys or rather "jobs" that they are assigned to.</li> <li>- They have access to a new deal type (subcontractor) that was created to display specific data for sub contractors.</li> </ul> <p><b>Use Case:</b> User may view a deal and specific roof parameters to determine a re-roofing quote.</p>

<b>Project Manager</b>	<p><b>Who:</b></p> <ul style="list-style-type: none"> <li>- This user tracks the deal from signed agreement to PTO (permission to operate).</li> <li>- They make sure that the permits and other processes get done in timely manner for the install.</li> </ul> <p><b>Abilities:</b></p> <ul style="list-style-type: none"> <li>- They can view the install tracker and tasks.</li> <li>- They can track the assigned deals and installs.</li> <li>- They can update fields, change milestones, make notes and upload documents.</li> </ul> <p><b>Use Case:</b> Manage projects and communicates with sales rep about issues related to the agreement/install. This role typically handles everything post-agreement signing.</p>
<b>Solar Designs</b>	<p><b>Who:</b> This user creates the image of the solar panels on the roof. They will let you know how many modules can fit on the house.</p> <p><b>Abilities:</b></p> <ul style="list-style-type: none"> <li>- They can see the design que.</li> <li>- They can assign design and upload/replace design data</li> </ul> <p><b>Use Case:</b> Assigned a deal which they then design for.</p>
<b>Solar Installer</b>	<p><b>Who:</b> This is an EPC user who doesn't utilize Enerflo other than to track where the installs are.</p> <p><b>Abilities:</b></p> <ul style="list-style-type: none"> <li>- They can view the install tracker for assigned installs and the install form summary.</li> <li>- They can schedule solar install.</li> </ul> <p><b>Use Case:</b> In Enerflo a solar installer may complete an "Install Survey".</p>