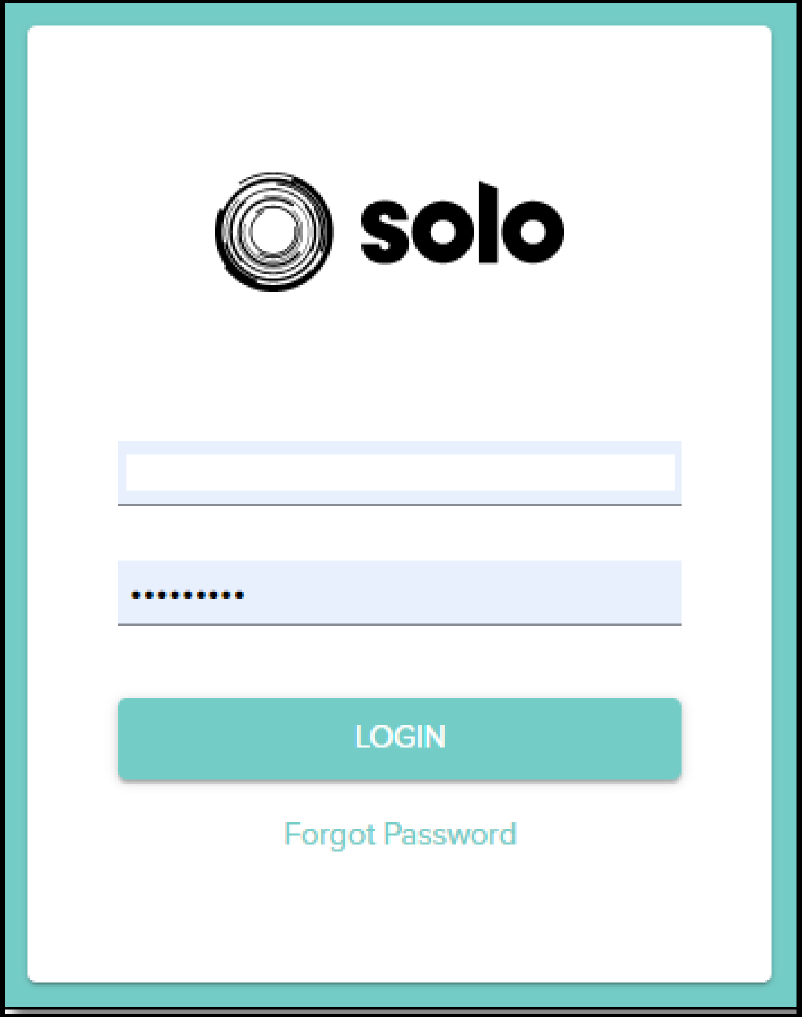
Go to your web **browser** (chrome or safari) and navigate to the following page:

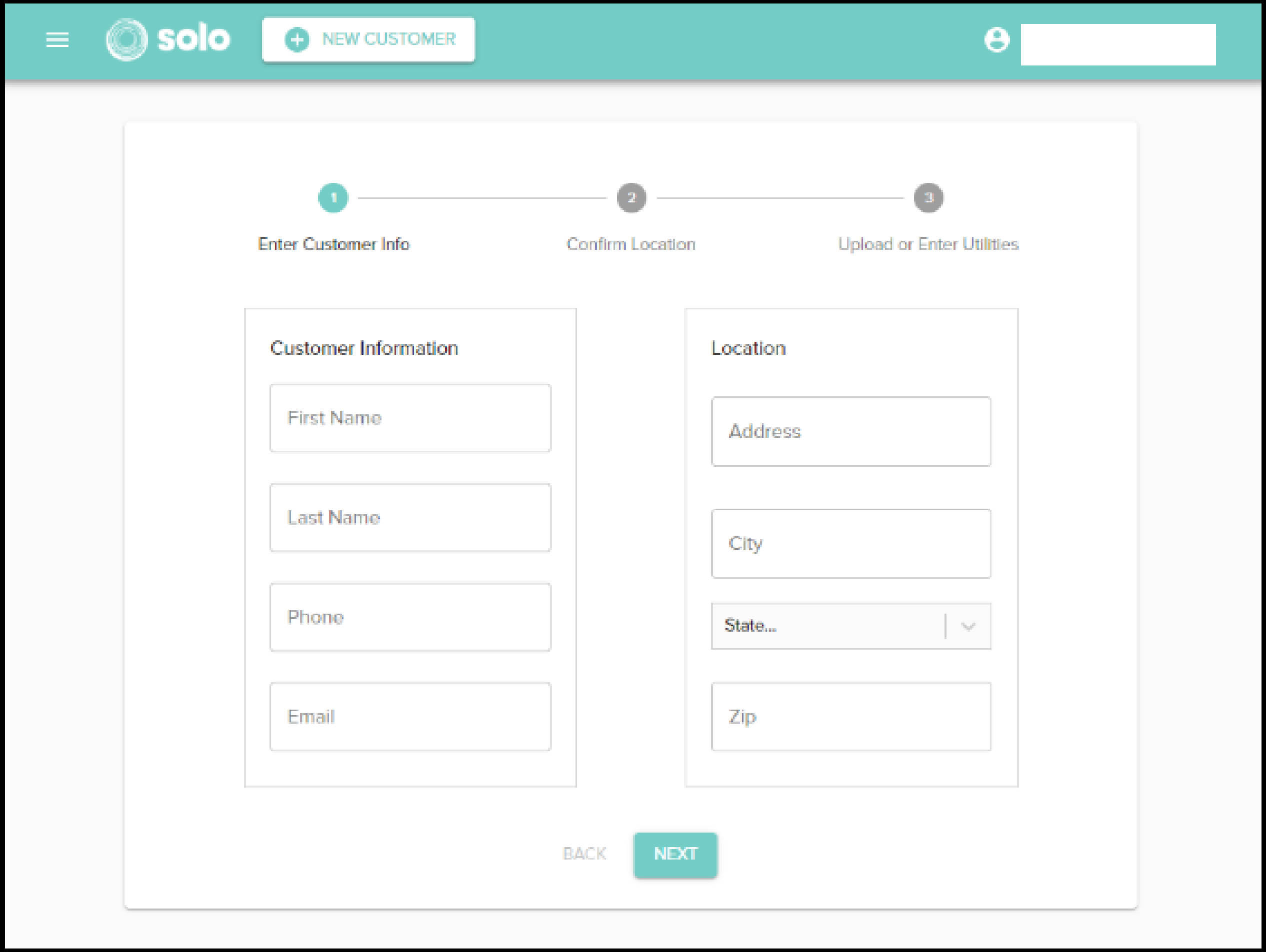
Https://phx.Gosolo.Io/

If you are logging in for the first time, your account has been set up by sales support - all you will need to do is set a password. Check your email for a link to do this. If you do not see an email from solo, or you are having problems logging in, contact **your manager.**



Enter Customer Information and Location

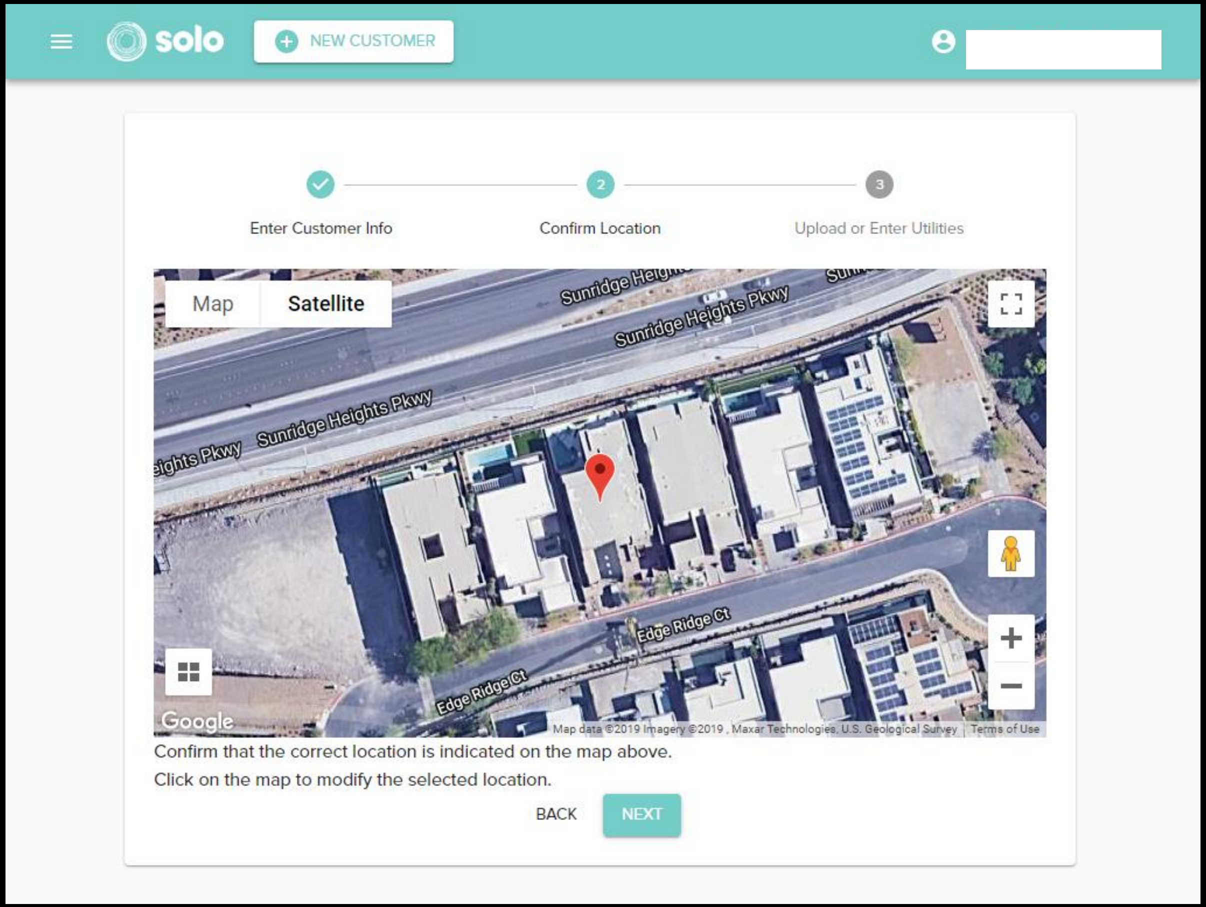
To start a new project, click the **New Customer** button in the top left corner of the screen. Enter your customer's name, phone number, email address, and location. If the customer's information may change or you make a typo, don't worry - that can be fixed once the proposal is generated.



Verify Customer Location

Verify that the map pin is correctly pointing to your customer's home or property. If you need to make an adjustment, simply click / tap on the correct home to make an adjustment.

If a satellite photo of your customer's home **is not available**, see the special note towards the end of the next section on how to document this. For now, you can proceed to the next step.

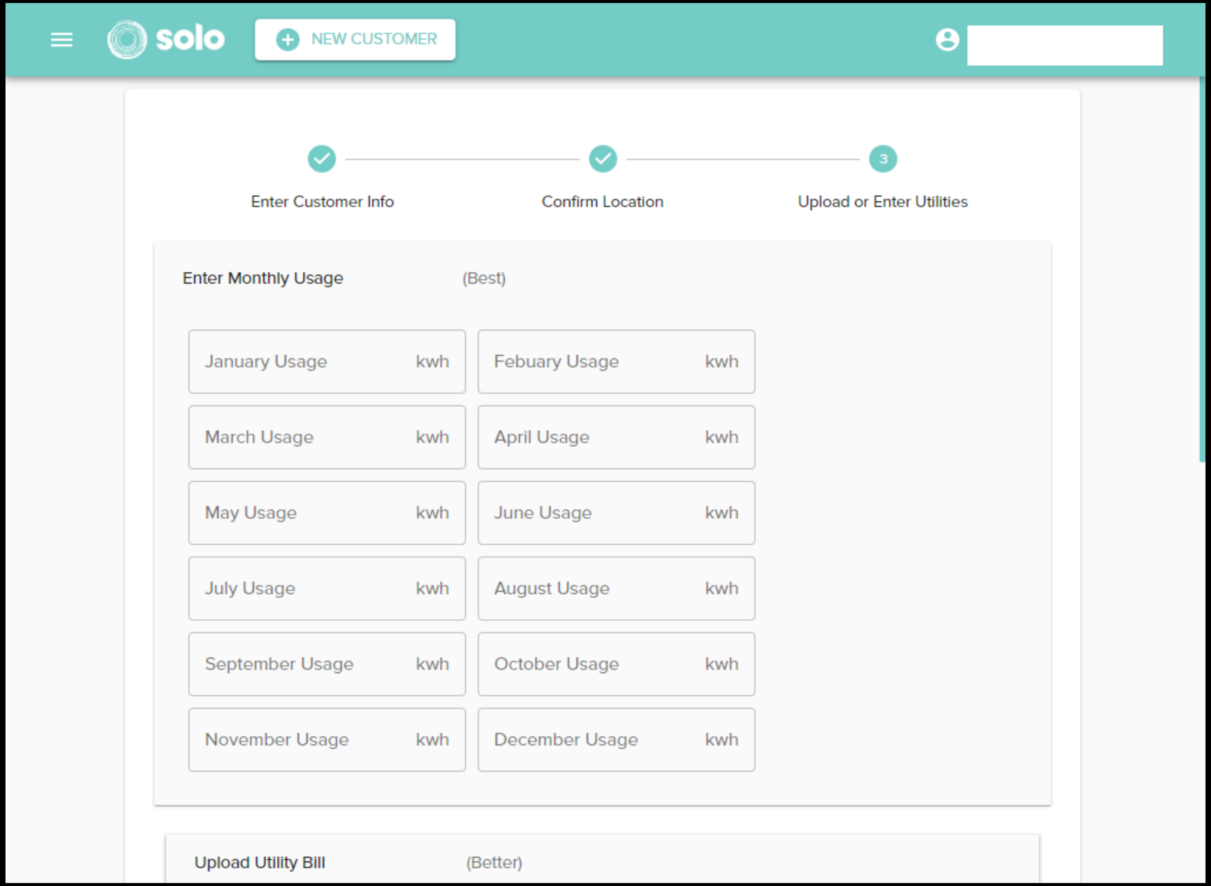


Enter Utility Information

There are three options for entering utility information:

- Entering monthly usage (best)
- Uploading a utility bill (better)
- Entering estimated yearly usage (good)

Per instructions from the installers, you can choose to enter the monthly usage OR upload a utility bill.



Once usage is entered, there are two options for timing of your proposal: Real Time and Next Day. As far the installer is concerned, you can select either option and expect the same result - your proposal will be generated within a couple hours but may take until the next morning if put in after hours.

Next, select your customer's utility company from the drop-down list, followed by the desired offset you are looking for. Optionally, you can check the "Max Offset" button. If you leave it blank, **the default offset will be 100%**.
Finally, select the desired inverter and panels from their respective drop-down menus.

NO SATELITE PHOTO - NOTES REQUIRED

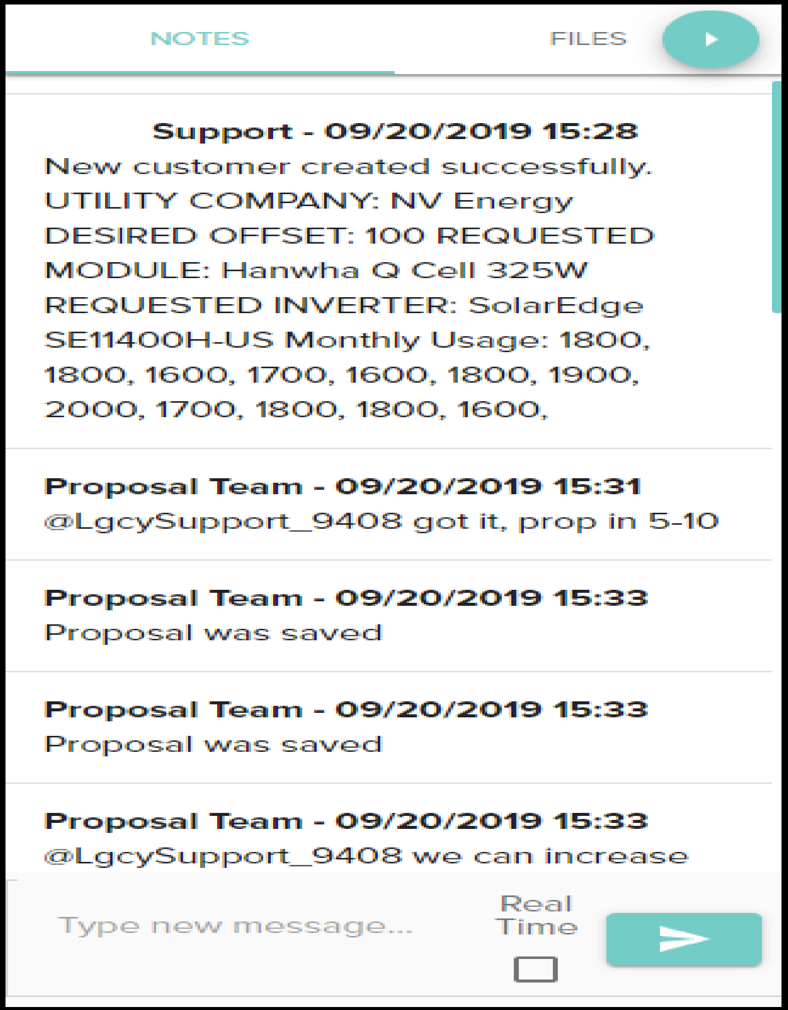
If your customer's home did not appear on the satellite image previously shown, be sure to indicate this in the notes before submitting. Include which plane(s) you would like to have the panels installed on as well as the guesstimated quantity that might work. The installer will send a site technician later to verify everything fits.

When you are ready to proceed, click **Submit**. You will be redirected to a new screen that contains all the information you just entered.

Wait for Your Proposal

Your proposal will be created by the **Proposal Team** and generally should be to you in a couple hours. When it is finished, you should **receive a text message** with the link to the proposal. If you need to communicate with the proposal team, use the notes area to send a message.

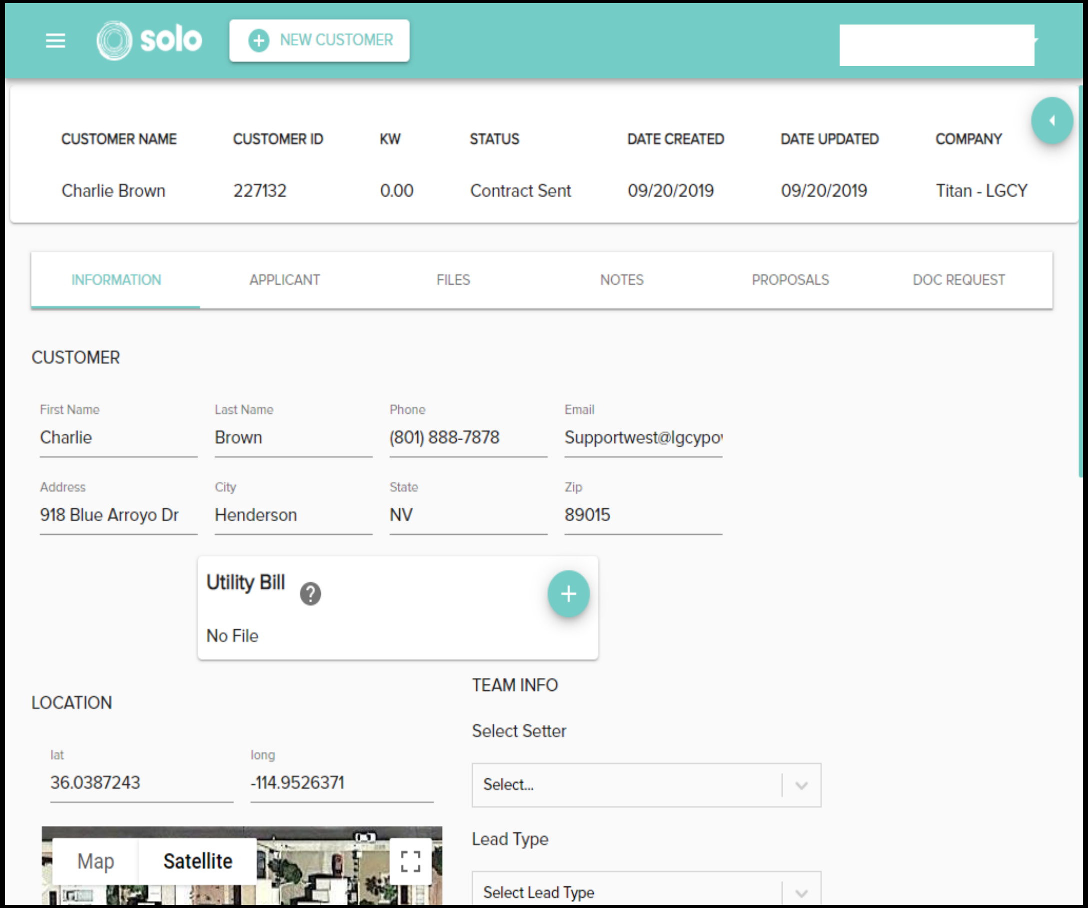
In the next article, we'll go over the basics of navigating Solo and your customer's information.



Information

This section contains information about your customer such as name and address, contact information, and location of the property. If you need to correct any errors prior to signing the installation documents, this is the place to do it!

Note that your screen may look different or contain different fields than these examples.



Information

This section contains information about your customer such as name and address, contact information, and location of the property. If you need to correct any errors prior to signing the installation documents, this is the place to do it!

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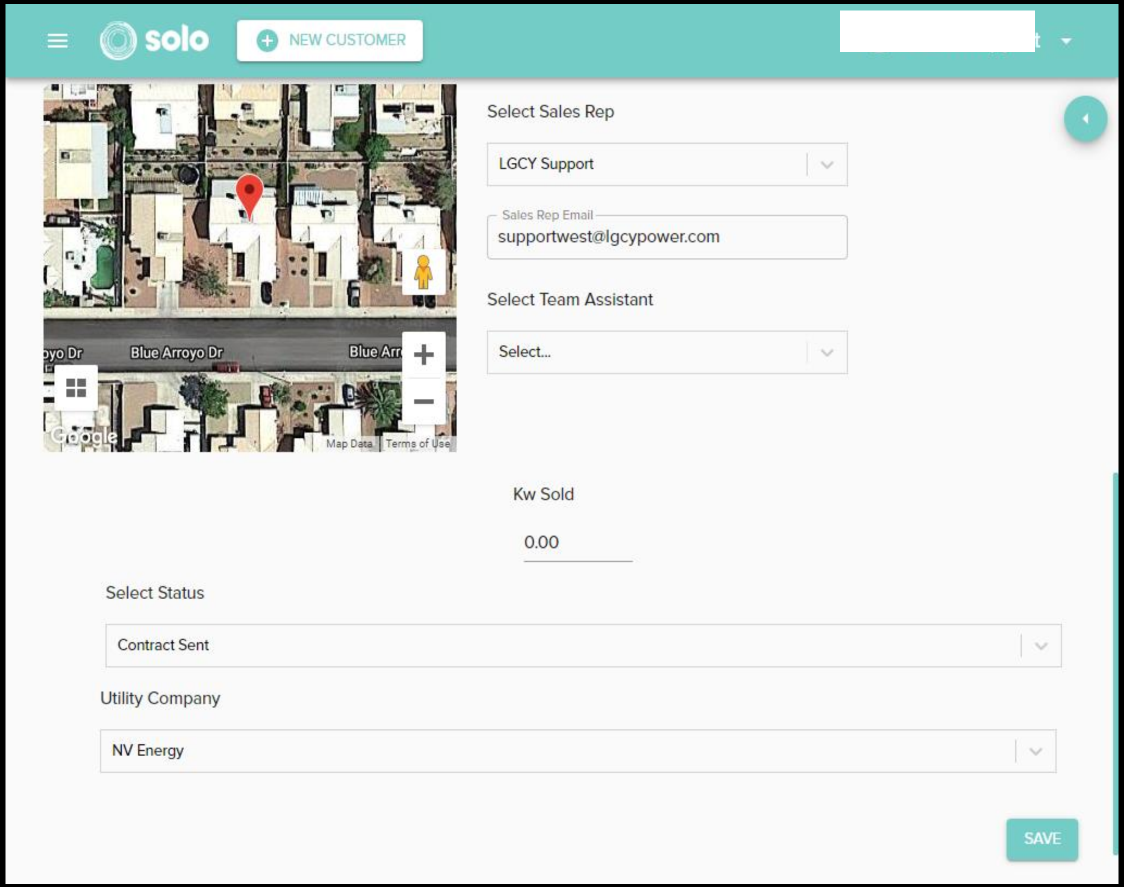
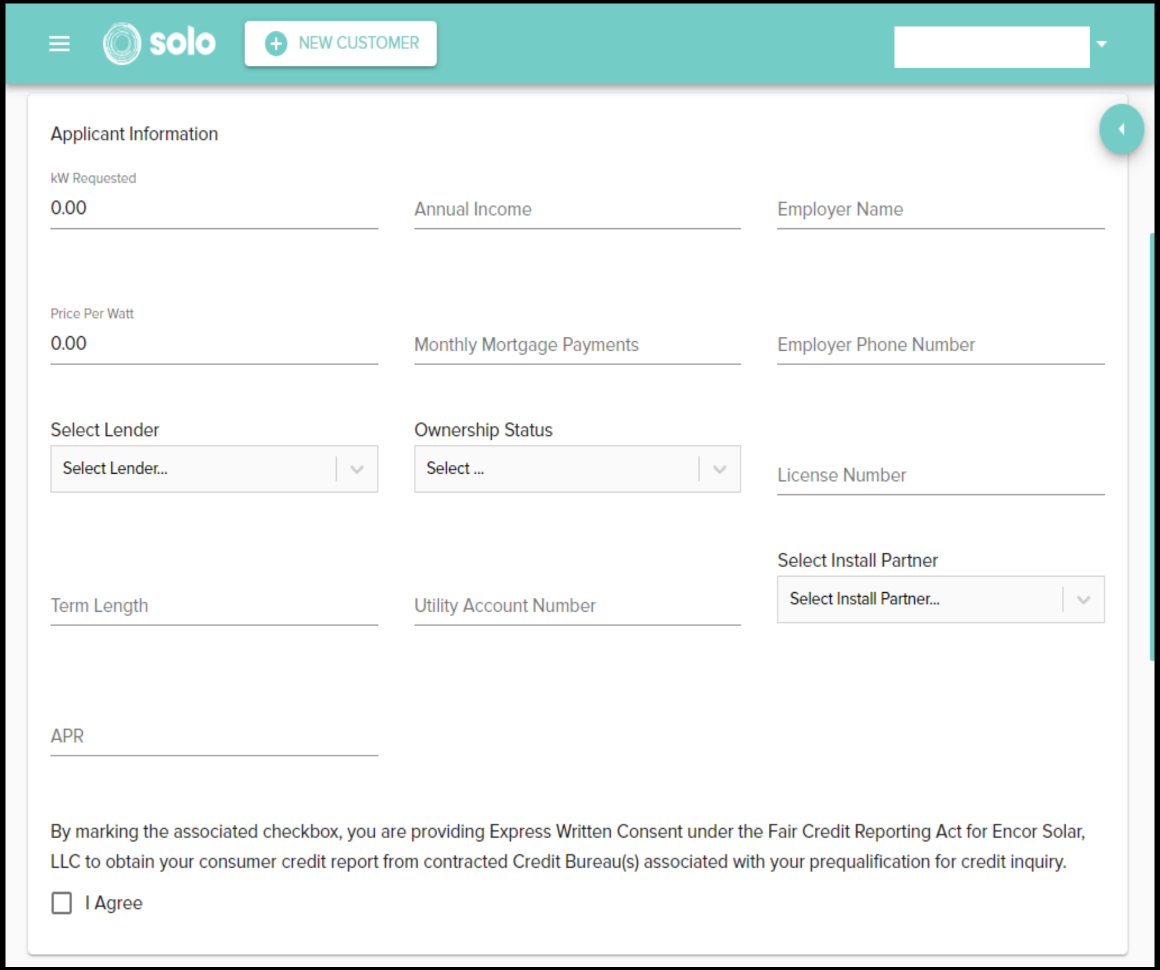


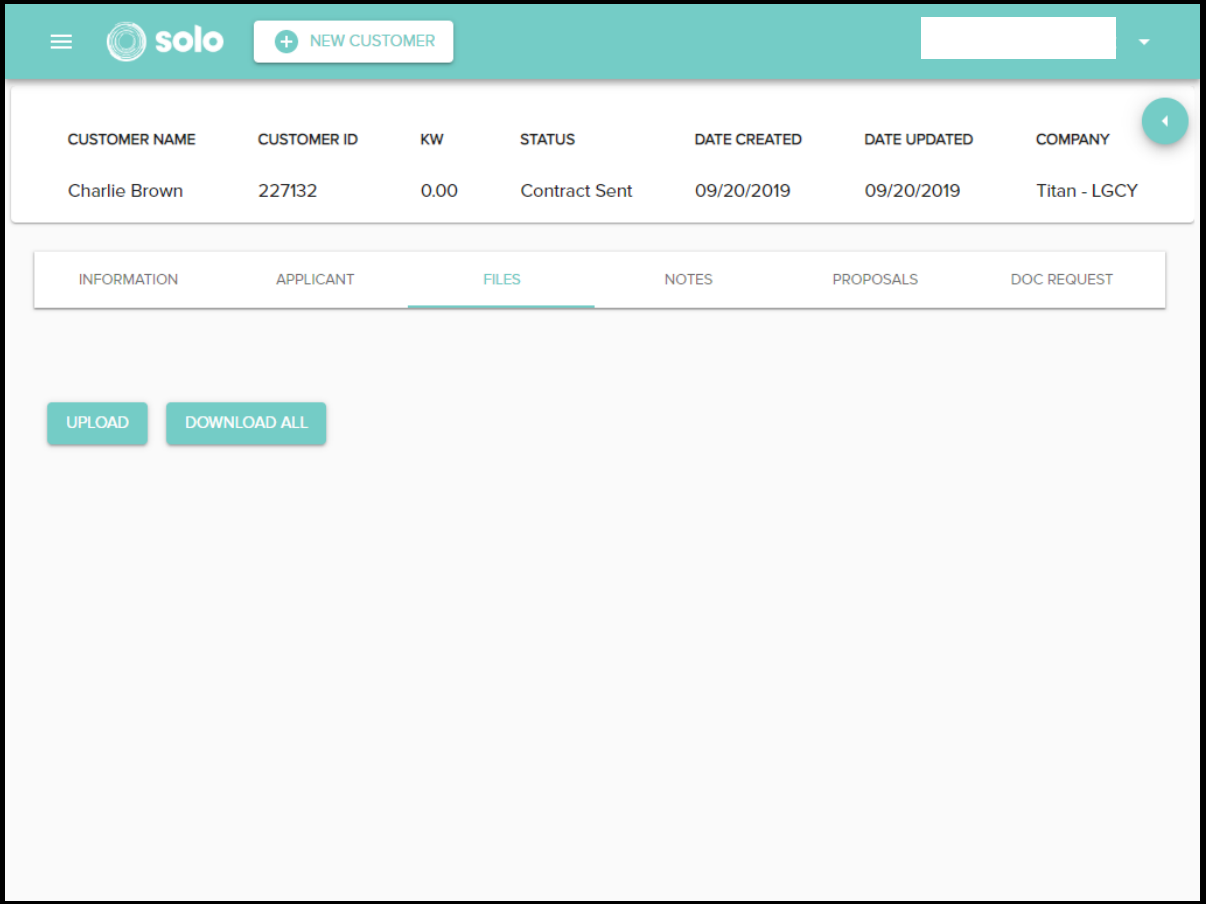
Applicant

The Applicant section allows you to fill out information prior to qualifying them through a financial provider. Information entered here will be automatically populated in the "qualify" screen later on. You can also add a co-signer here.



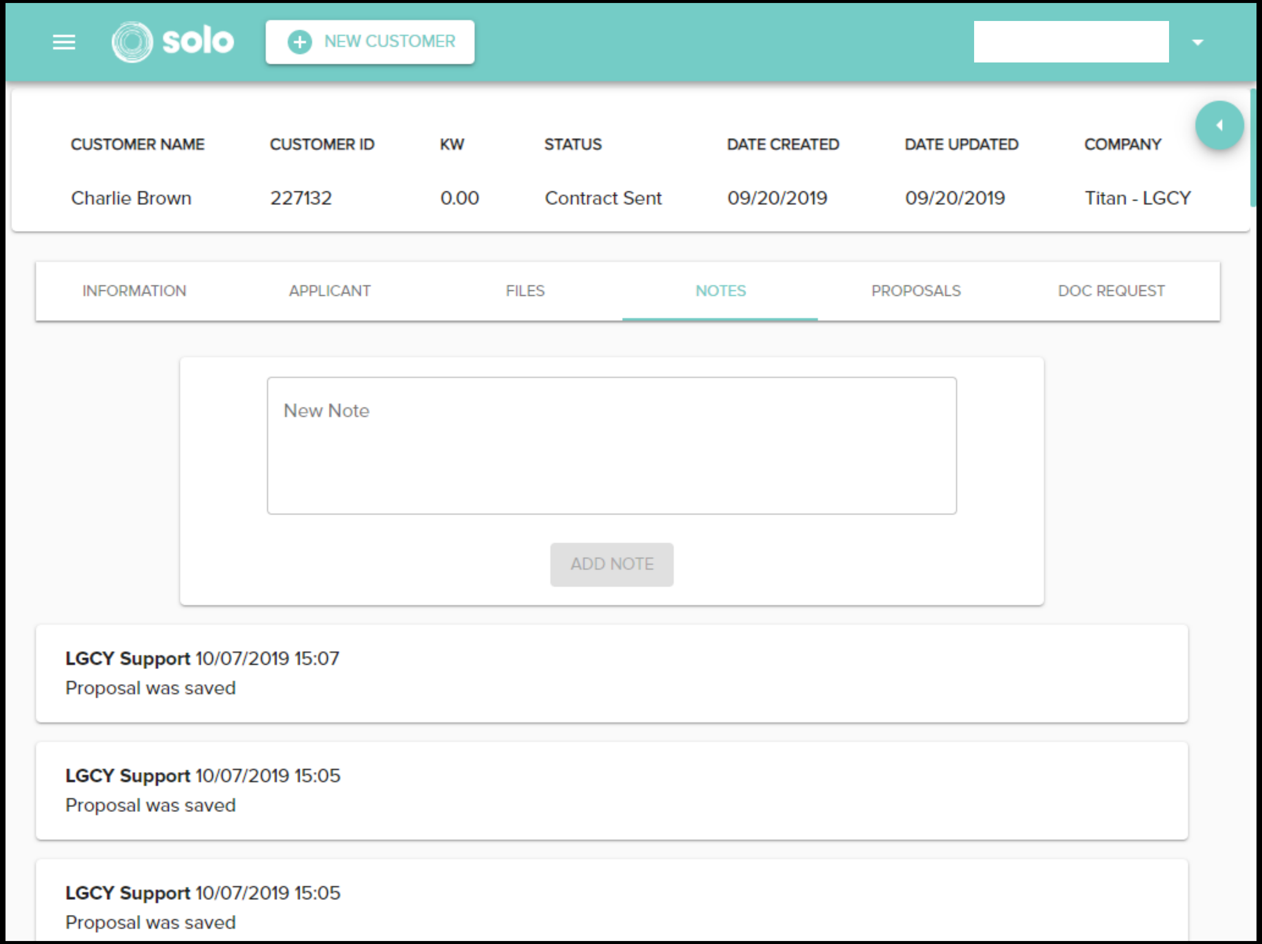
Files

The files section is used if there is any supplementary information you need to communicate to the Solo team. Files added here are not seen or submitted to the installers.



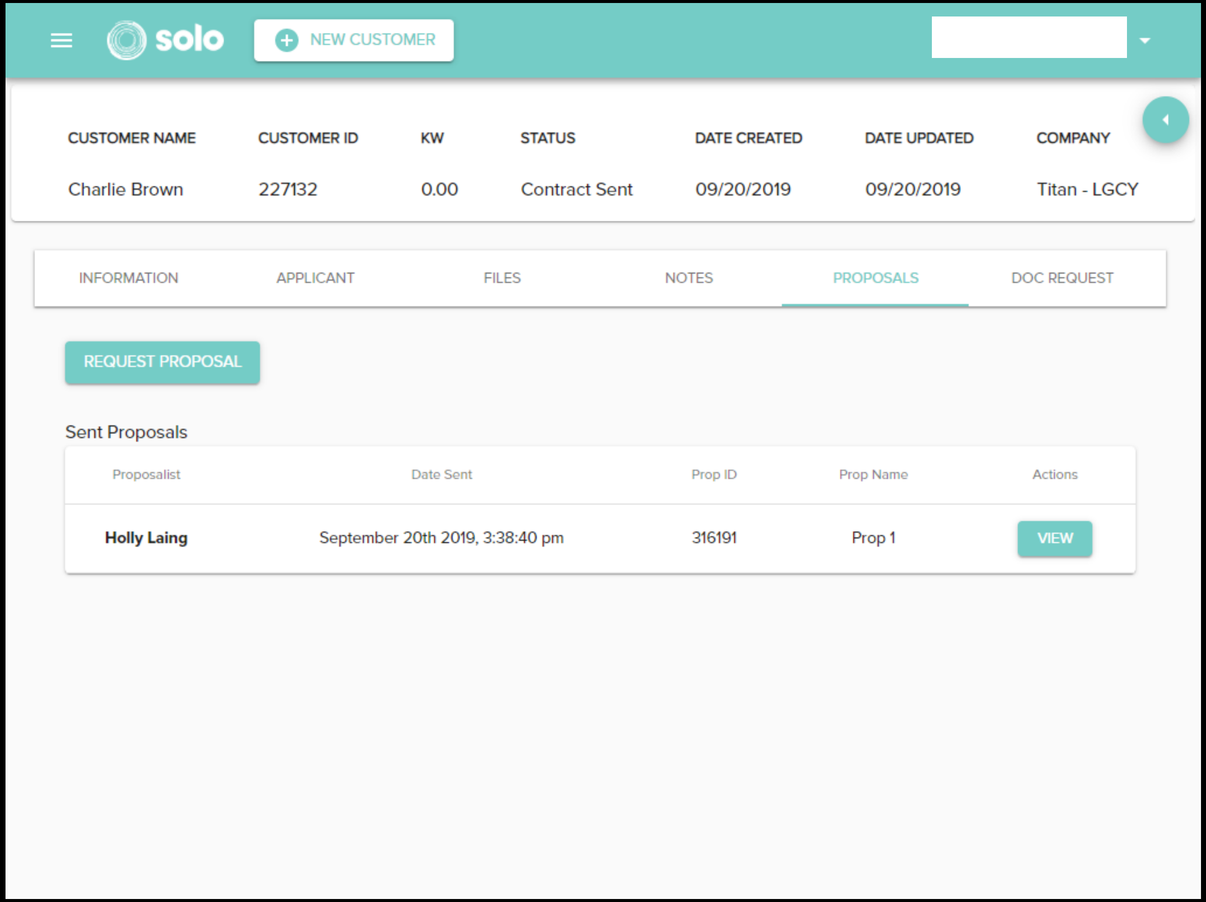
Notes

The notes section allows you to see any notes left by the Solo Proposal Team, as well as any communication you have had with them.



Proposals

In this section, your proposal will be populated and contain a link to view. While it may not be common, it is possible to have multiple proposals listed.



Doc Request

This section allows you to request the installation agreement for signature by you and your customer. Simply select the relevant information from the drop-down lists and then click **Request Docs.**

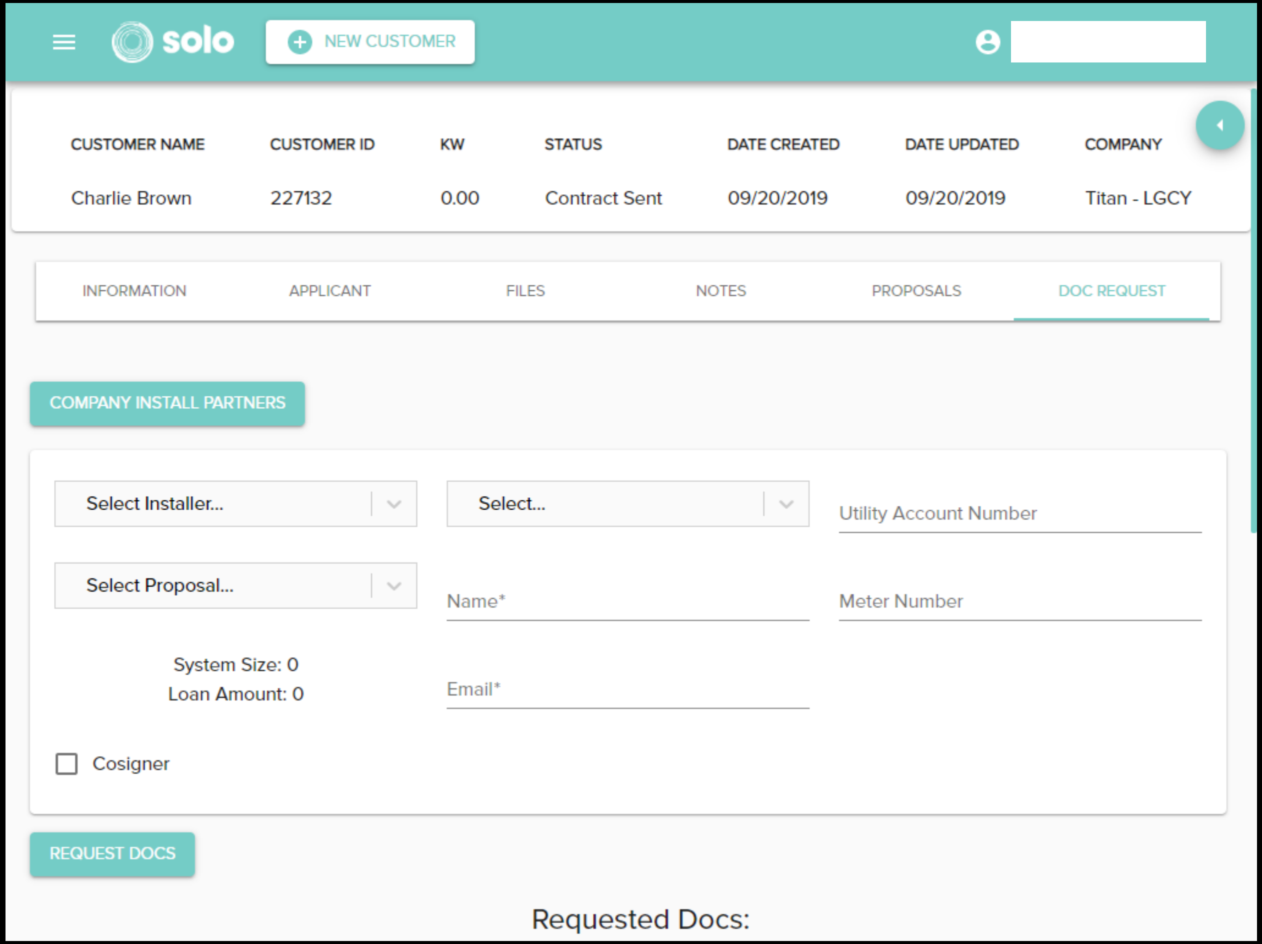
There are installers listed under the Select Installer drop-down. Select the installer that you will be using for the close.

Special note for Titan:

There are two installers for Titan, Titan SRP and Titan Solar Power. Except for customers in Arizona living within SRP territory, you will always select Titan Solar Power as the installer. When you are ready, click **Request Docs.** You can also opt to send them out via the proposal menu under the *Request Docs* option.

Once requested, it can take up to **ten minutes** for the documents to be prepared for digital signature. You should receive a text message when they are ready to be signed. Note that an email from a service called DAS should be sent to you first. Once you sign, it will be sent to your customer for signature

In the request fields is a section showing previous requests, as well as a field with a link to view the contract once all parties have signed.



Cover

The cover slide shows the customer's name and contact information, as well as the Orange Burst Solar logo. In the top-left corner is a message window that pops out where you can communicate with the Solo team if need be. On the top-right is a pop-out menu that allows you to manipulate fine details in the proposal.

Design Summary

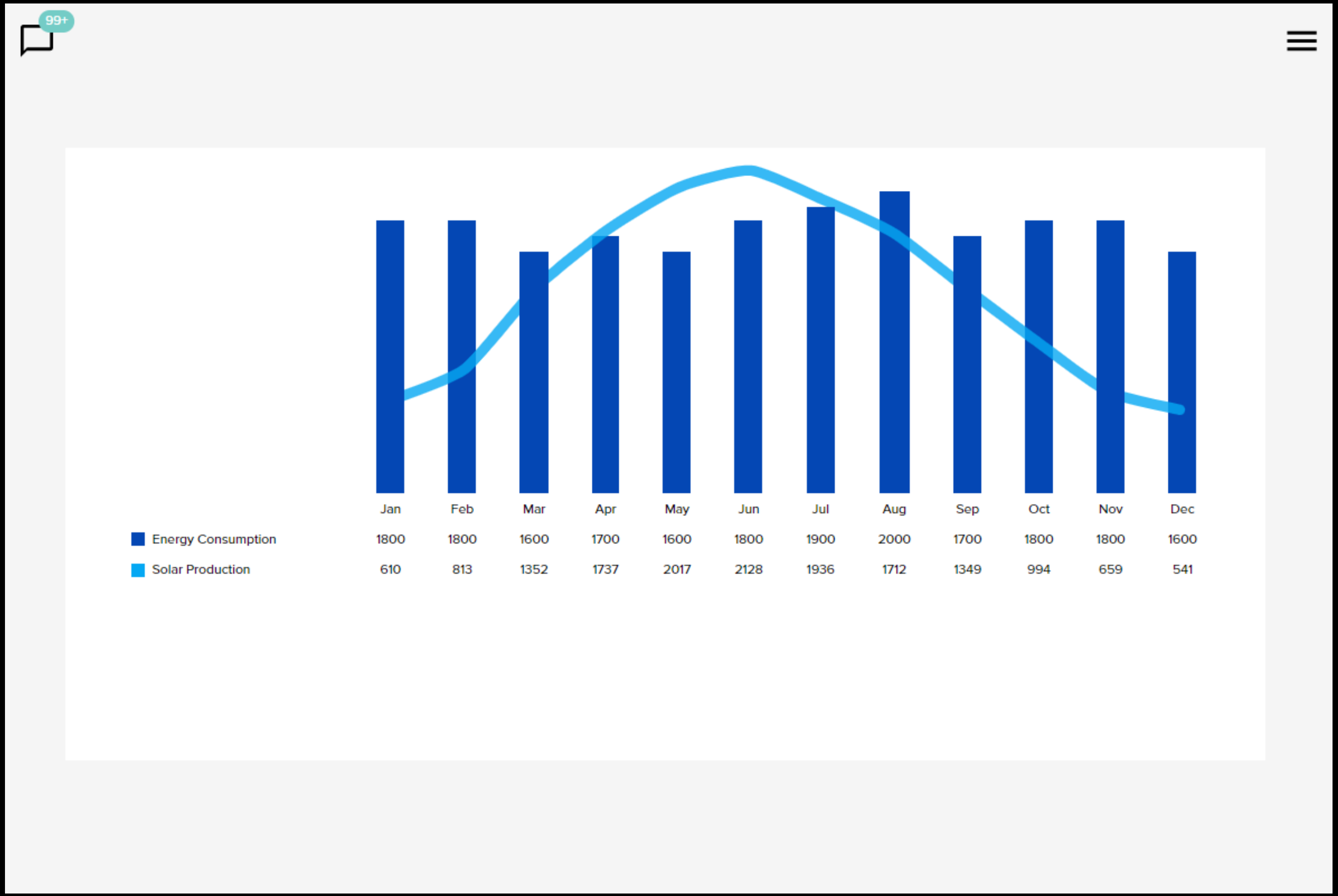
This slide contains a summary of the design and equipment selected. Under the Estimated Yearly Production section, you can click **Show Details** for a breakdown of data on the solar array.

Solar Design

Image of the customers house with a view of where the solar panels would be from our proposal/engineering team.

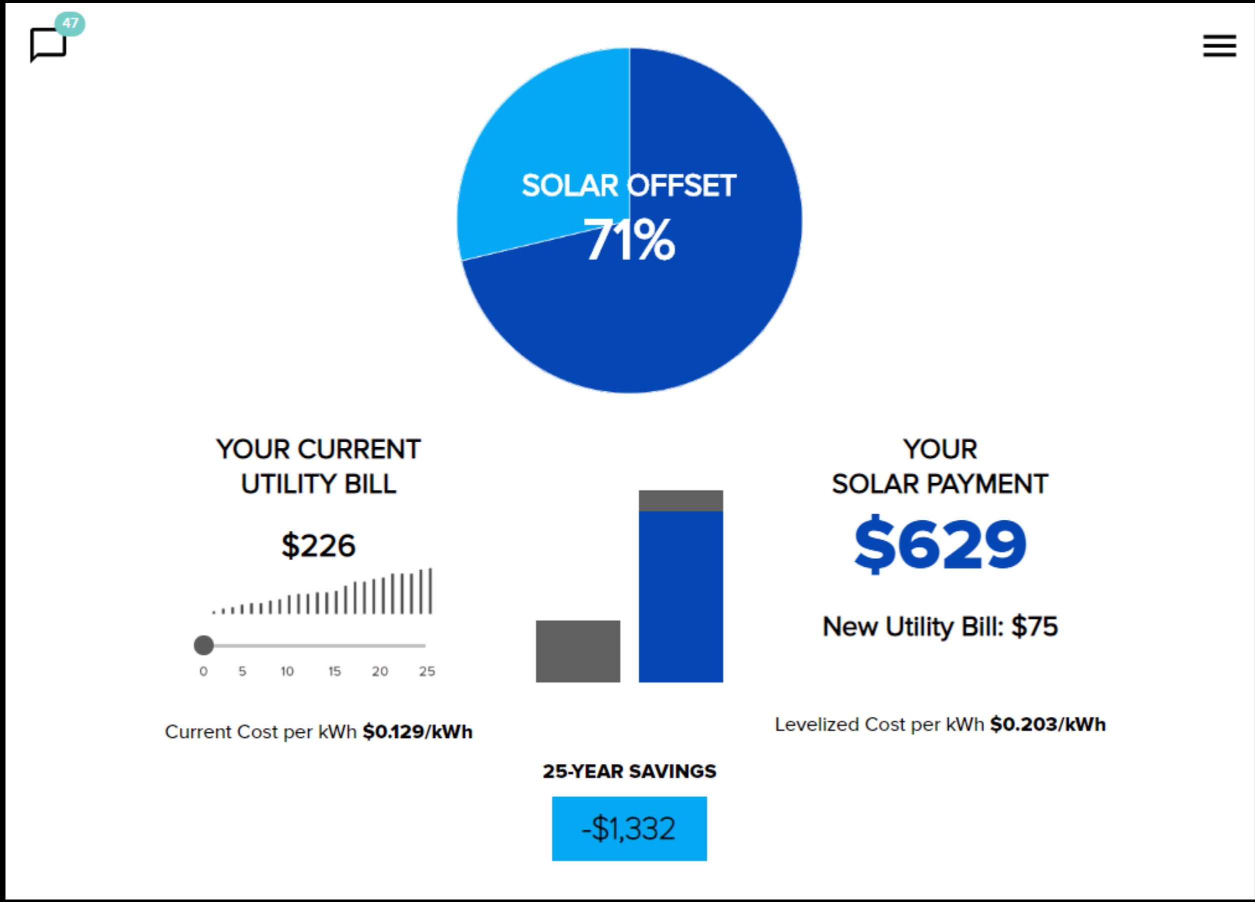
Energy Consumption

This section shows a simple comparison of energy consumption vs solar production.



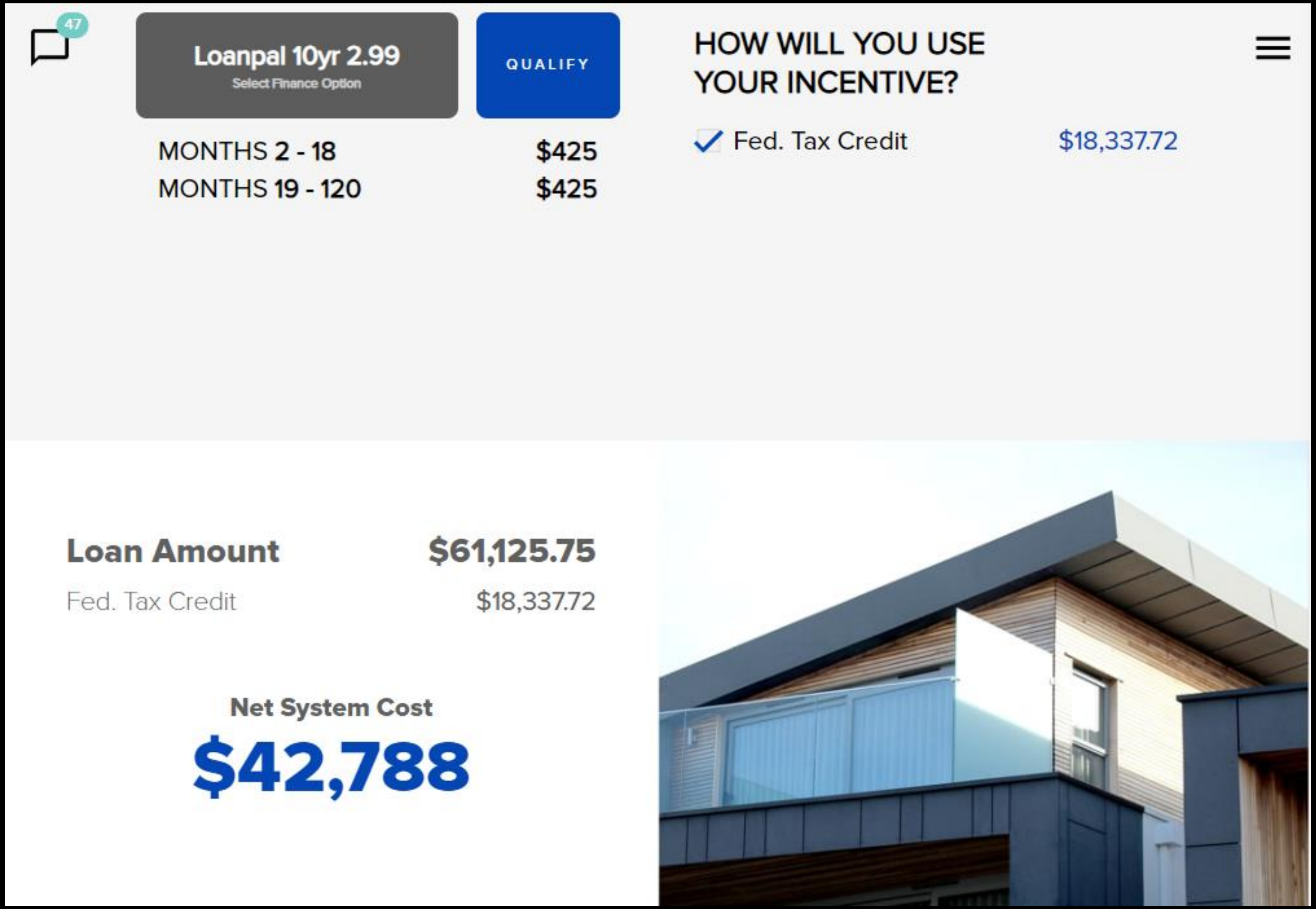
Utility Offset

This screen gives an overview of the offset of your customer's proposed system, including monthly payments, savings, and a utility cost increase slider showing what utility costs versus solar payments may be like during the next 25 years.



Loan Details

This screen has two parts - the top half allows you to choose the financing partner and terms, whether you want to use the federal tax credit, and then qualifying the customer for financing. The bottom half summarizes how much the system is going to cost overall, including whether the federal tax credit is applied



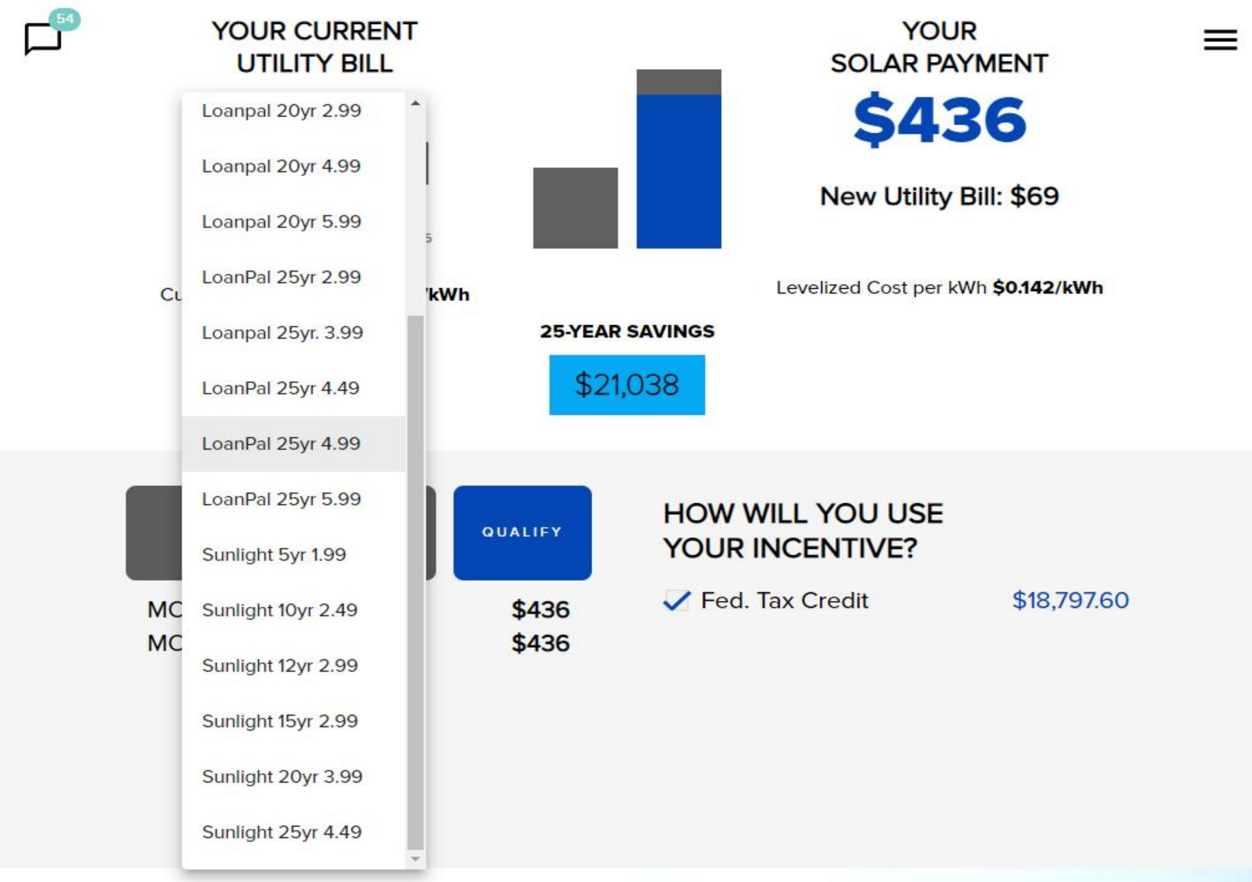
Selecting Financing Terms and Qualifying Your Customer

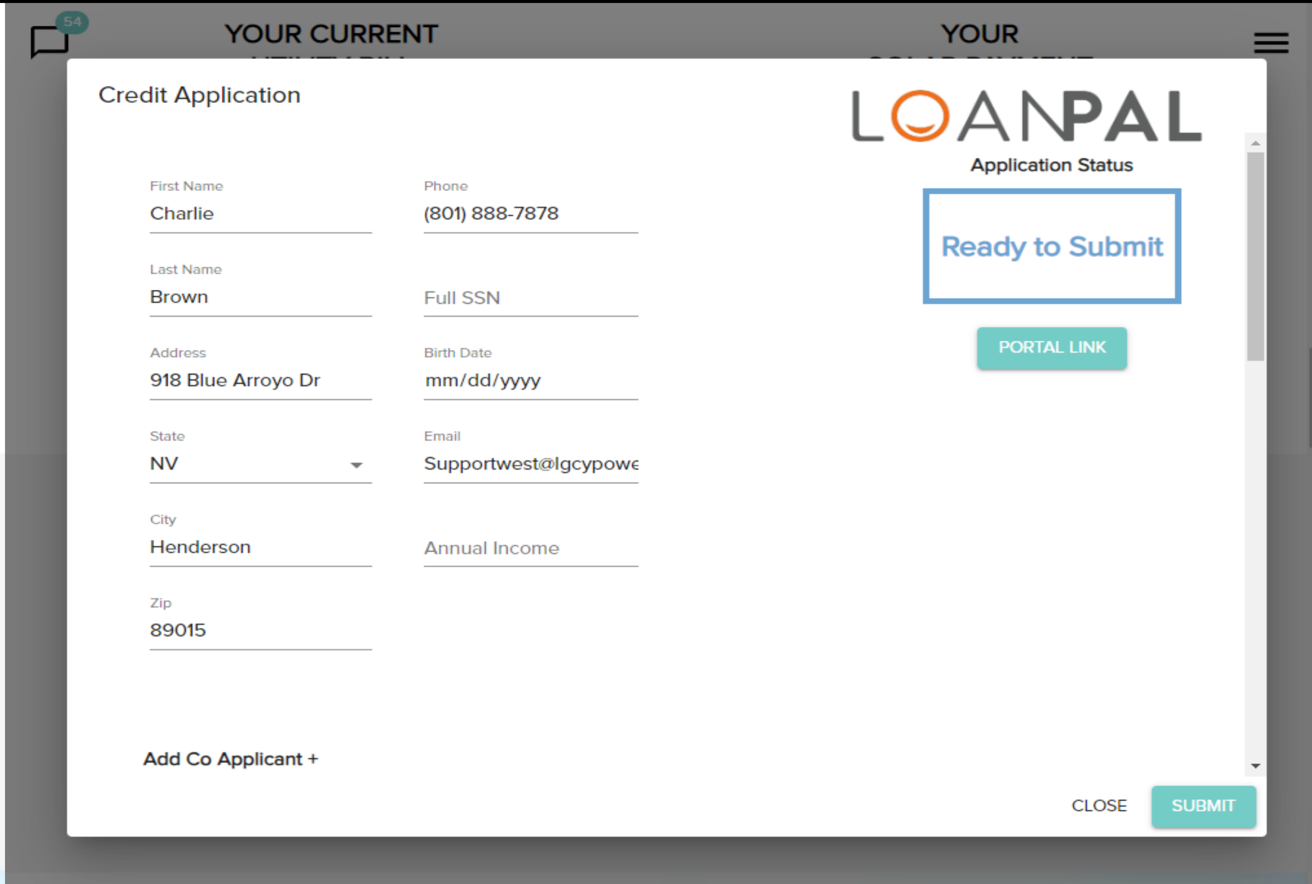
Click on the **gray button** to select the loan provider and terms that work best for your customer (including cash if desired). When you are ready, click the **blue Qualify button** to open the loan provider screen. If you have previously filled out the **Applicant** section, most of the information here should be pre-populated for you.

Be sure to scroll all the way to the bottom of the page and that the customer has read and accepted the terms and conditions. When all required fields are completed, the blue box at the top with **Ready to Submit** will be filled in, and you can click the submit button to transmit the information to the loan provider.

All communication with the loan provider, including an approval decision and loan document signing, will take place **outside** the Solo platform (usually via email). Neither the installers or Solo control or influence the timing or decision made by the loan provider.

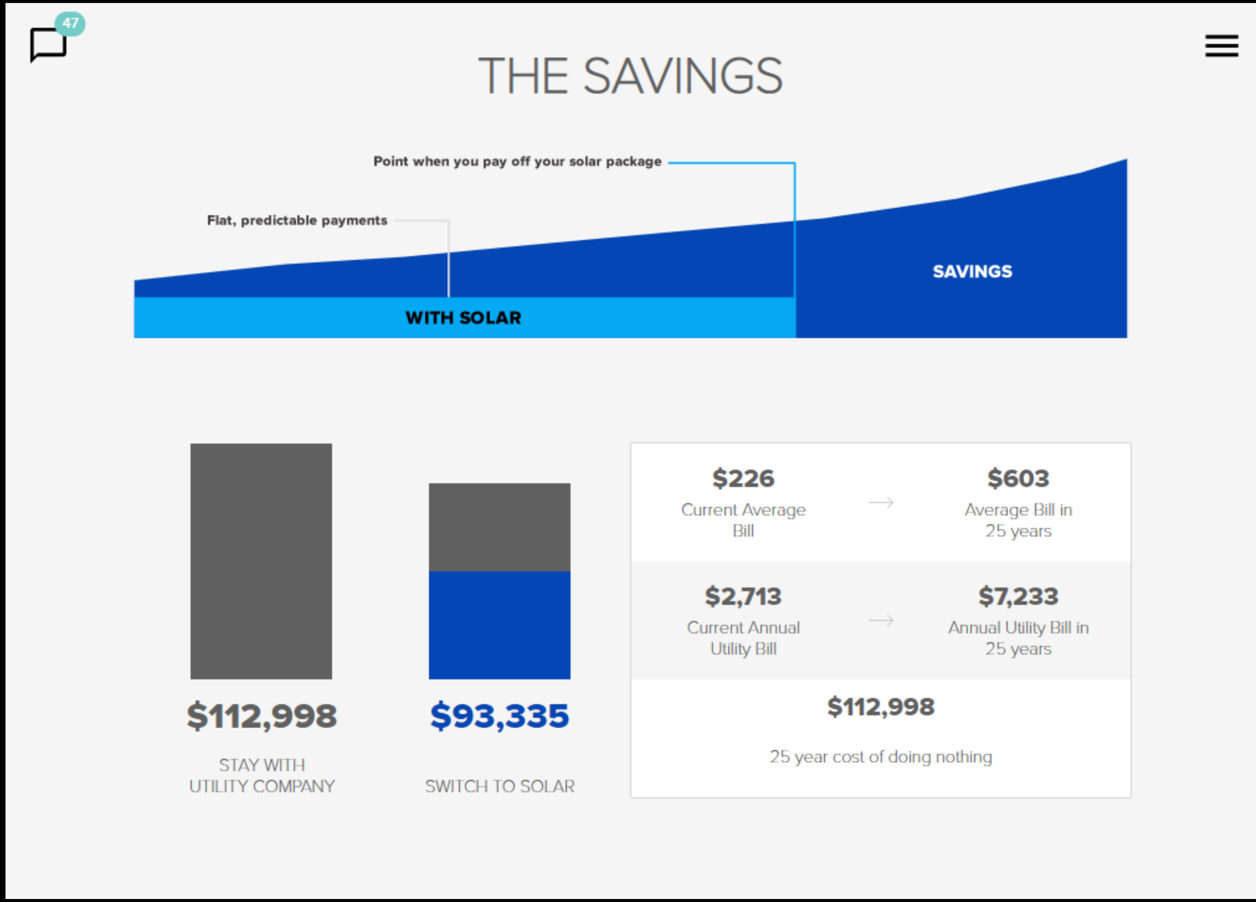
solo


54
YOUR CURRENT UTILITY BILL
Loanpal 20yr 2.99
Loanpal 20yr 4.99
Loanpal 20yr 5.99
LoanPal 25yr 2.99
Loanpal 25yr. 3.99
LoanPal 25yr 4.49
LoanPal 25yr 4.99
LoanPal 25yr 5.99
Sunlight 5yr 1.99
Sunlight 10yr 2.49
Sunlight 12yr 2.99
Sunlight 15yr 2.99
Sunlight 20yr 3.99
Sunlight 25yr 4.49
YOUR SOLAR PAYMENT
$436
New Utility Bill: $69
Levelized Cost per kWh $0.142/kWh
25-YEAR SAVINGS
$21,038
QUALIFY
$436
$436
HOW WILL YOU USE YOUR INCENTIVE?
Fed. Tax Credit
$18,797.60


54
YOUR CURRENT
YOUR
Credit Application
LOANPAL
Application Status
Ready to Submit
PORTAL LINK
First Name
Charlie
Phone
(801) 888-7878
Last Name
Brown
Full SSN
Address
918 Blue Arroyo Dr
Birth Date
mm/dd/yyyy
State
NV
Email
Supportwest@lgcypowe
City
Henderson
Annual Income
Zip
89015
Add Co Applicant +
CLOSE
SUBMIT

Savings Breakdown

This screen provides a visual representation of savings by going solar.

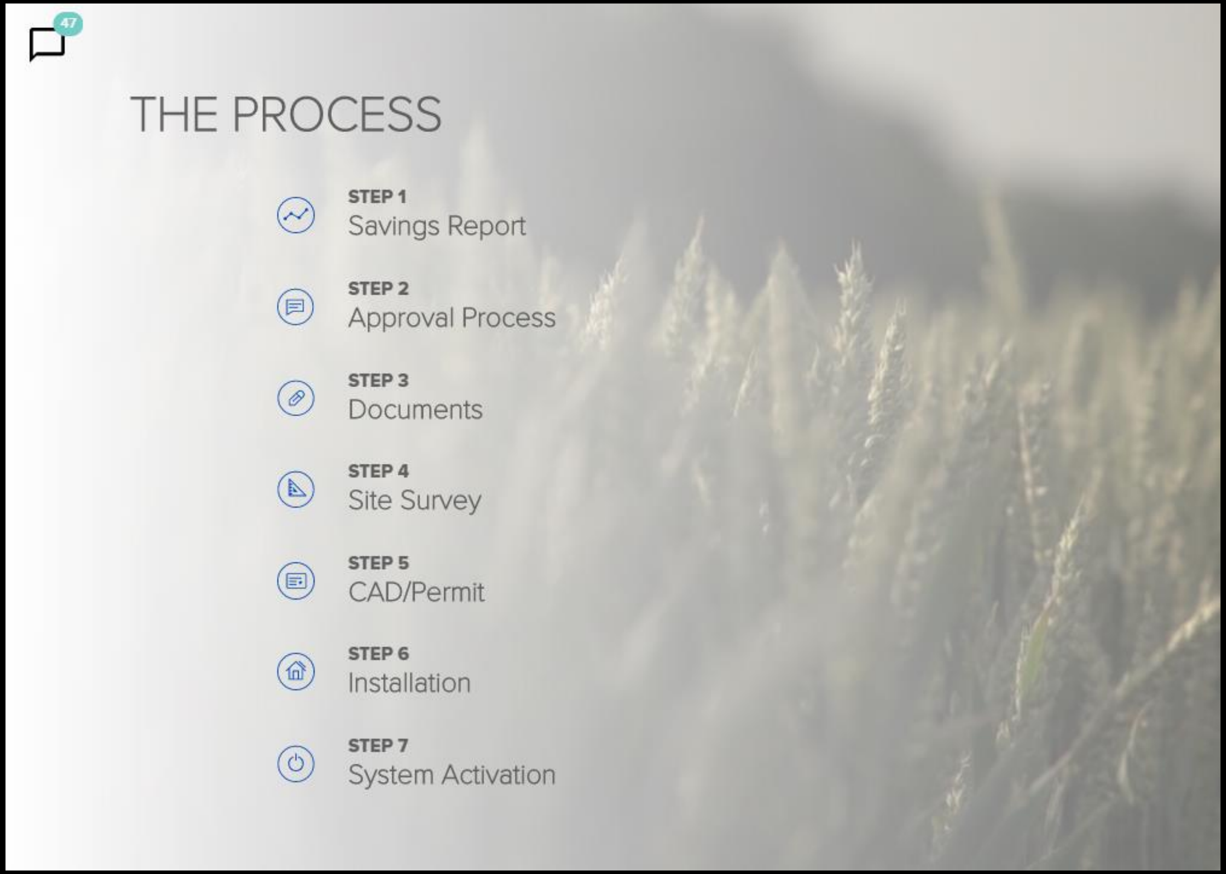


The Facts

This slide contains facts about residential solar and is meant to be shared with the customer.

The Process

This slide outlines the steps in the entire process from proposal to system activation.



Proposal Details and Fine Print

This slide gives a breakdown of system, cost, and utility information you can share with your customer.

PROPOSAL DETAILS

Utility

Annual Utility Bill	$2,713
Current Consumption	21,100 kWh
Estimated Cost Per KWH	$0.129/kWh
Annual Utility Price Escalator	4%
Current Rate Plan	Schedule RS
Post Solar Rate Plan	Schedule RS
Utility Company	NV Energy

System

System Size	12.16 kW
25 Year System Production	354,245 kWh
Year 1 Solar Production	15,038 kWh
Estimated Cost Per KWH	$0.144/kWh

Cost

Total Loan Amount	$61,125.75
APR	2.99%
Loan Term	10yr
Post Solar Annual Utility Bill	$895

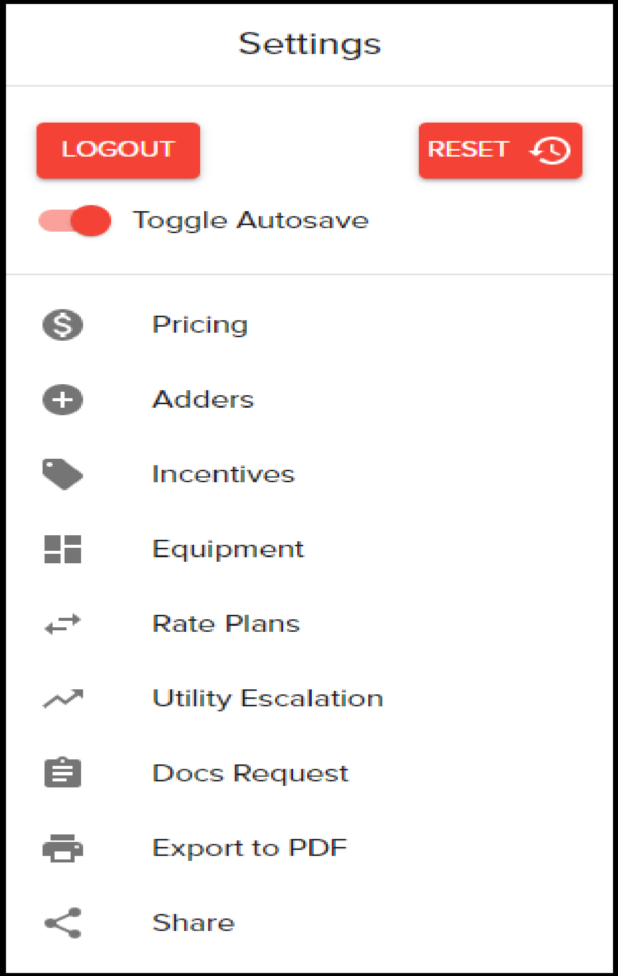
Titan Solar Power does not provide tax or legal advice. You should consult your tax advisor for more information. Titan Solar Power does not guarantee monthly savings. Any savings that a customer may experience will come from their ability to use power in conjunction with solar according to the utility interconnection agreement. Titan Solar Power does not honor any promotion, rebate or product that is not expressly detailed on the final sales contract. The interest rate provided in this proposal is subject to credit approval by the financing provider for your loan. The data provided in this proposal is a preliminary estimate and does not represent a binding agreement or obligation. No party provides and guarantees, warranties, or representations regarding the production, utility rate increases, or any other data in this sales proposal. This proposal is a preliminary estimate and not an approval for financing.

Main Menu

From the proposal, you can click on the top-right menu (three horizontal lines) to open settings and options for the proposal. As far as the installers go, the key sections you will need to pay attention to are **pricing**, **adders**, **equipment**, and **docs request** links.
You can also choose to toggle the **auto-save** feature, which means every time you make a change in the proposal, such as equipment or adders, the proposal updates. If you ever need to come back to it later, the changes will automatically be saved.

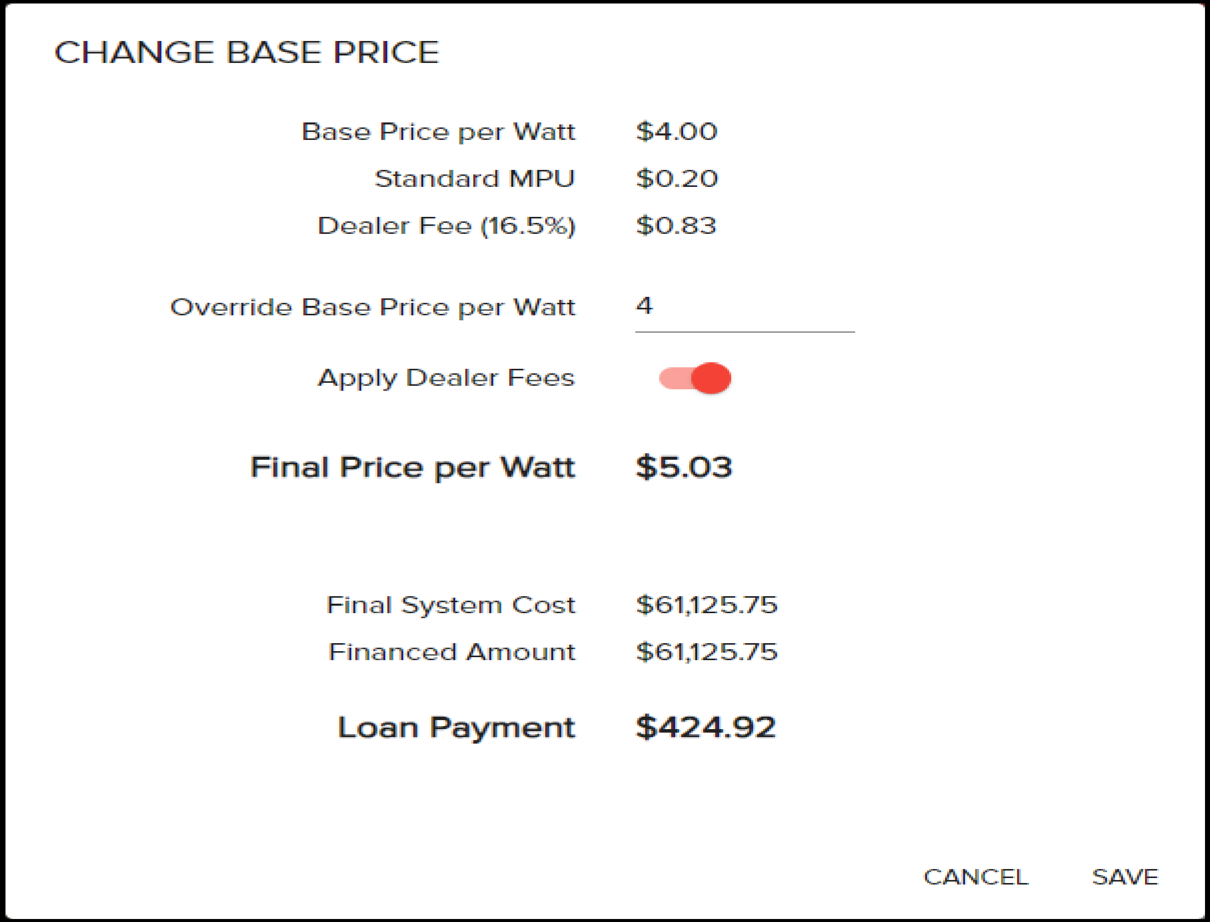
DO NOT USE SHARE FEATURE

Do not use the **Share** link in the menu as it will send a link where anyone can change the information in the proposal, including price per watt, equipment selection, and so forth. If you want to share it with your customer, use the **Export PDF** link instead.



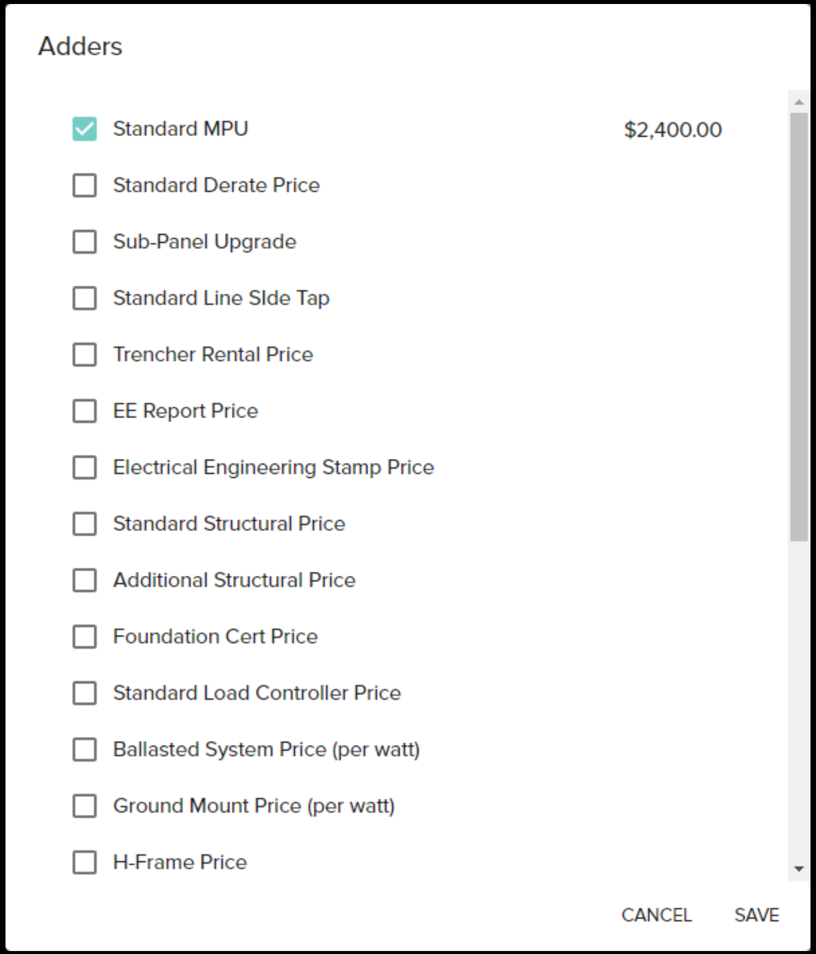
Pricing

This menu is where you can set your price per watt and get a total breakdown.



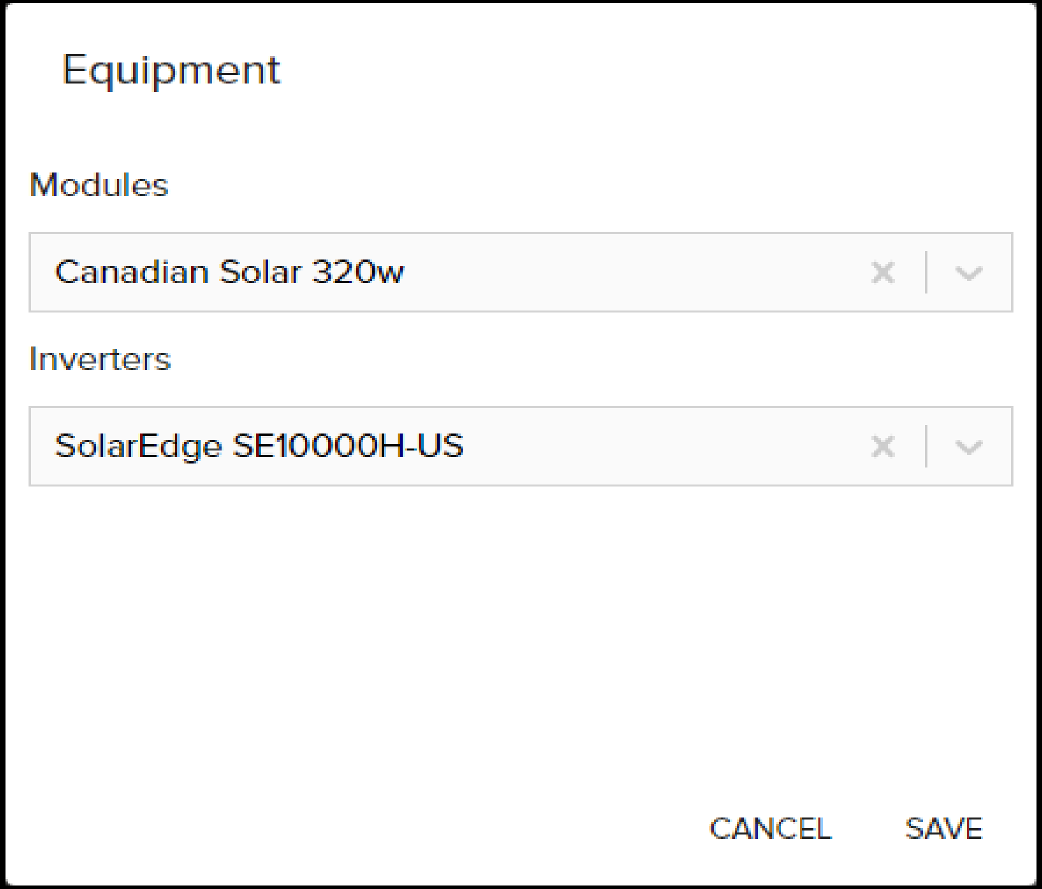
Adders

This section allows you to add known or expected Adders to the cost of the system - simply check the box next to the item you want to include and click S**ave**. The price will automatically be worked into the total system cost.



Equipment

The Equipment screen allows you to change both the panel make and model, as well as the inverter. Once you hit **Save**, the cost will be updated in the proposal automatically.



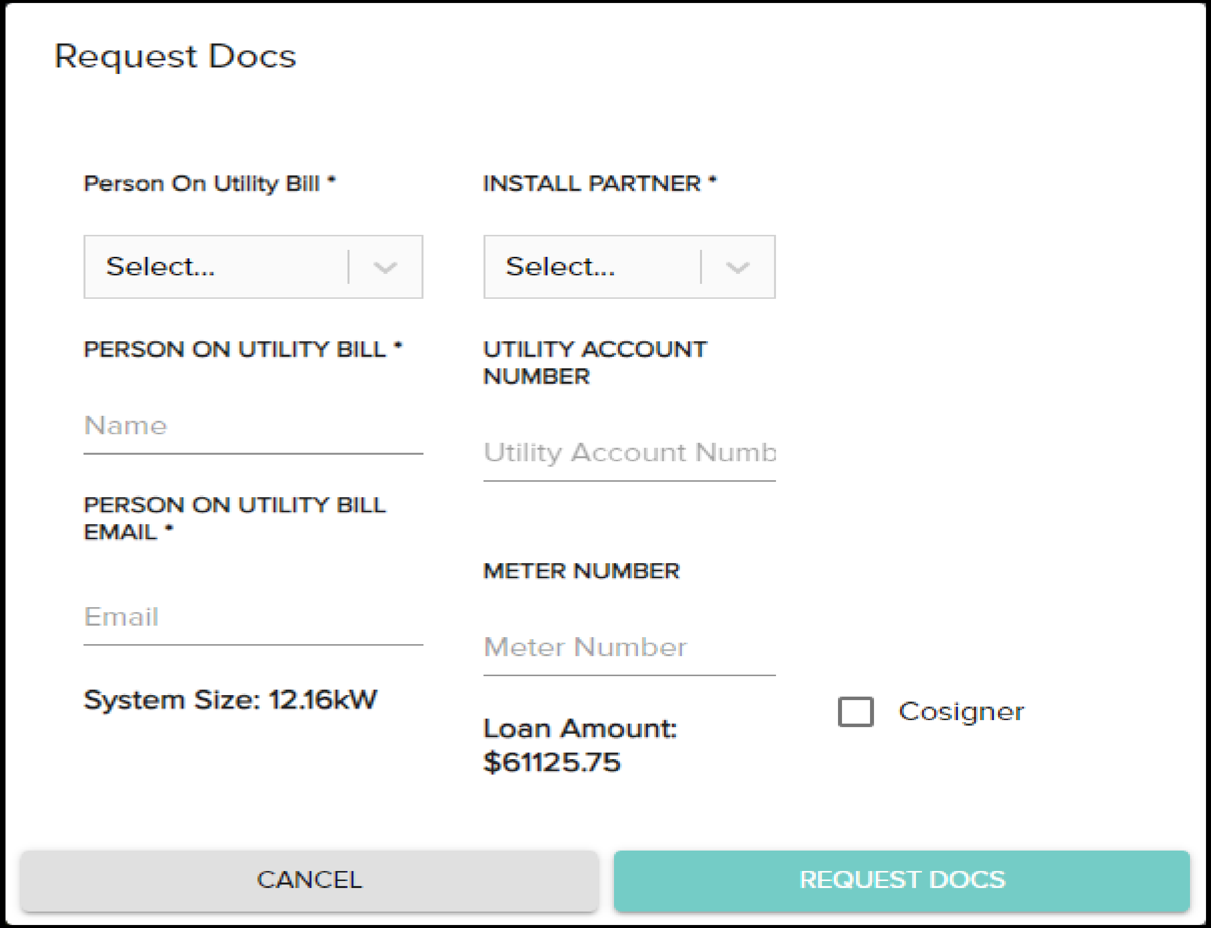
Docs Request

You can request the install documents be sent out to you and your customer directly from your proposal - simply select the correct information from the drop-down menus and the information will be populated for you automatically.

When you are ready, click **Request Docs**.

Once requested, it can take up to **ten minutes** for the documents to be prepared for digital signature. You should receive a text message when they are ready to be signed. Note that an email from a service called DAS should be sent to you first. Once you sign, it will be sent to your customer for signature.

When you are ready, click **Request Docs**.



Export PDF

If you would like to share the proposal with your customer, use the **Export PDF** function to make a copy you can email. This copy will not have the options to make changes or adjustments to pricing.

Titan Verification Call

Once the documents are signed, you and your customer will need to complete a verification call with LGCY Sales Support before the project can be submitted to Titan.

Verification Number: 1 (540) 726-5044

Support Hours: Mon – Fri 8 AM-10 PM, Sat 12-6 PM MST
The following is an example of the verification call you and your customer will be required to complete as part of the deal submission process.

.

Welcome Call
BEFORE Speaking with the Homeowner

Verification line this is (agent name) can I have your name and the company you work with?
Hi (Energy Consultant Name) did you sell this through Sighten or solo?
Thank you can you pass the phone to the Homeowner so we can verify a few things?

Speaking to Homeowner
Hello (Homeowner name), My name is (agent name) Do you have a few moments to verify the information on your project?

Confirm the following

Thank you, the address we have, on for your solar project is, (Homeowner address). Is that correct?

Is your home located in a HOA? If so, what is the name and contact information of your HOA?
The email address we have tied to your account is, (Homeowner email). Is that correct?
The phone number we have on the account is, (Homeowner number). Is that correct?
Generally, we can get an install date within 30-60 days from agreement signing. However, if roofing or electrical work is required it may take longer. A site survey is not required on all projects but if needed Titan will be reaching out to schedule.
Thank you for confirming your information and congratulations on going solar. You can go ahead and pass the phone back to your Energy Consultant.

Speaking to Energy Consultant

Hey (Energy Consultant) please remember to send the required photos to deal.audits@lgcypower.com so this can be uploaded to NetSuite.

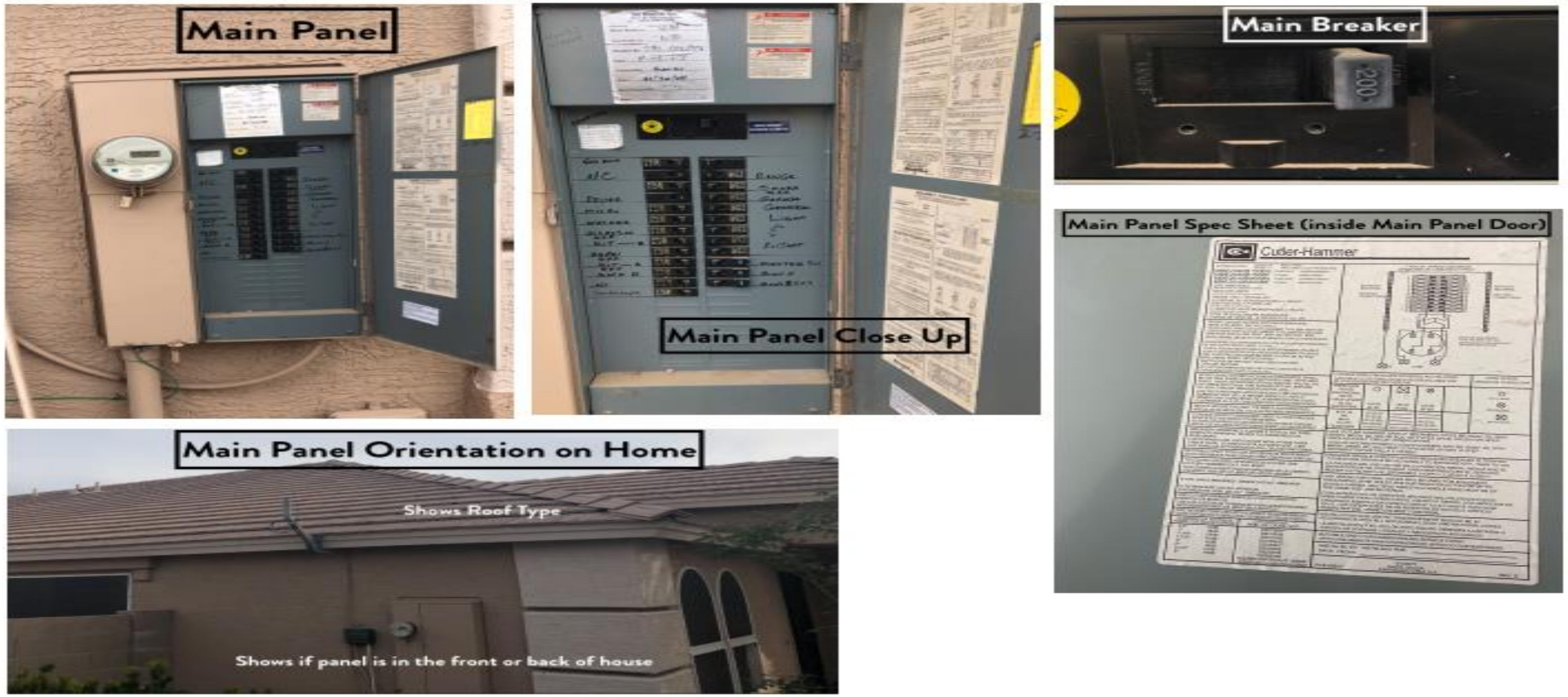
(Photos needed: utility Bill, Meter picture up close and wide picture, Purchase agreement)

Perfect Packet guidelines allow your project to be eligible for Fast Track and ensure the fastest possible install times!

Required Documents: 1) Completed / Accurate Titan Install Agreement 2) Completed / Accurate Titan Utility Install Agreement 3) Copy of the Utility Bill 4) Copy of the Proposed Design Layout 5) Completed Financing Docs a.

Loan Documents do not need to be uploaded. We will get these from the financier b. Lease Documents do need to be uploaded with the inputs for the project*)*

Required Photos:



Once you have completed your verification call with LGCY, a member of Sales Support will pass your account over to the Deal Audits team. They will need a full copy of the utility bill, and **the following five (5) photos taken by you:**

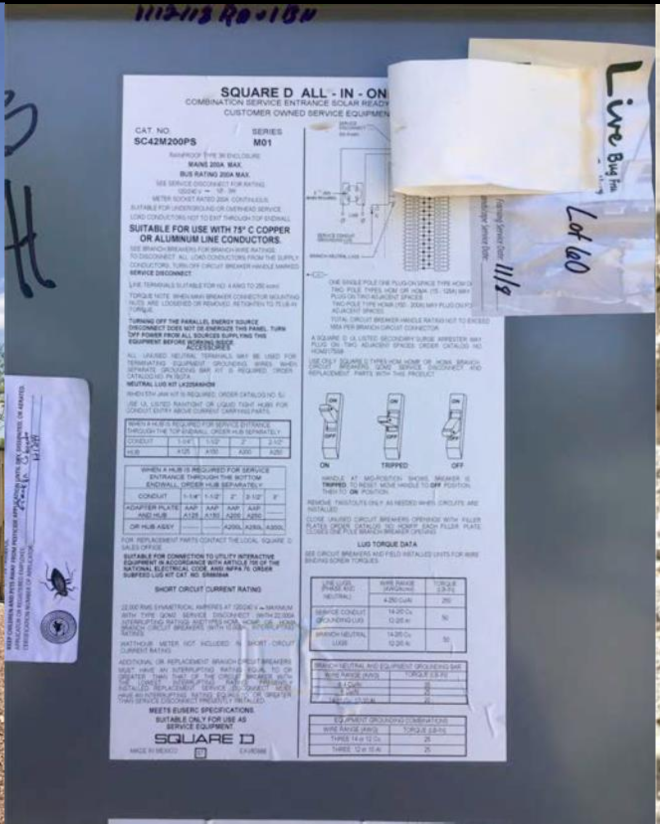
- A **wide shot** of the side of the house where the main service panel is, where the inverter will go, and the roof type
- The **riser -** the utility conduit under the service panel
- A **general picture** of the main service panel (MSP) or load center, including breaker brand and room in the panel for the solar breaker; and,
- The **inside door** (label or no label), and
- A **close up** shot of the main breaker and its rating

After these and any other relevant documents are collected the account will be uploaded to NetSuite and Titan will be reaching out to set up a site survey.

IMPORTANT NOTE - PLEASE READ: As of 2/1, Titan has transitioned from Podio to NetSuite, but has not yet granted access to sales teams. If you need assistance with your accounts, contact Sales Support.

NOTE: For AZ, TX, and NM markets - based on a review of the pictures, a site audit may not be required.

Here are example photos from Titan:



Site Survey & Design

Titan's dedicated technicians will visit the property to confirm the system design, verify measurements, and adjust for shade and obstructions on the roof. After the site evaluation, a solar design expert will make any number of adjustments to the customized plan to ensure everything looks and operates perfectly. From site visit to design, it can take between 3 to 5 weeks.

Permitting

After design plans are finalized, they will be submitted by Titan to the local city government Authority Having Jurisdiction (AHJ) for permitting. Permit approvals are subject to schedule of the governing AHJ Department. This can take anywhere from 2 to 8 weeks.

Installation

After permit approval, Titan will contact the property owner to schedule installation. When Titan’s install team arrives, they will go over the design plans for final approval before they begin. Once the Titan installation crew wraps up the job, they’ll finish by giving the property owner a full Solar 101 on the system. Depending on the size of property and system, this phase takes 1 to 5 days.

Inspection

There must be a final inspection by the city or county before the system can be connected to the grid. Depending upon the time of install, the backlog of solar inspections, and the local government, the estimated time to complete this step is generally 1 to 4 weeks.

Utility Connection & PTO

Two things that need to happen before the system can produce electricity. First, Titan will submit the documents to the utility company to connect to the grid. This usually takes 1 to 2 weeks. Second, the utility company has to install net metering to track how much energy is producing. Titan will have little control over how long this step is going to take!

LGCY Sales Support

Mon – Fri 8AM-10PM, Sat 10AM-6PM MDT

Call or text: 1-855-353-4899

Option 2

Email: support@lgcypower.com

Please note: If your project was not initially started by the Sales Support team, they will not have visibility into the status, send documents for eSignature, or fulfill redesign requests.

Titan Solar

Mon – Fri 8AM-5PM, Closed Saturday & Sunday
Phone:1-855-SAY-SOLAR (855-729-7652)
Email: info@titansolarpower.com
Mailing address (for cash payments):
525 W Baseline Rd
Mesa, AZ 85210

Please note: Titan has requested that when you contact them to reference the **Titan Solar Project number (or TSP number)** rather than the customer name, address or phone number.