THRYVE Portal Guide

A Handbook to All Things Portal

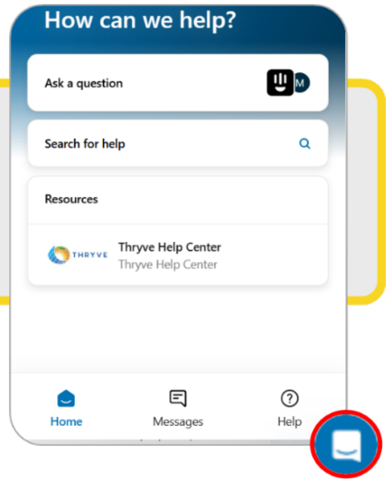
Welcome to the THRYVE Portal! Your go-to sales portal for creating leads, generating quotes, and building winning solar proposals. Whether you're guiding a homeowner through their solar journey or finalizing a deal, the Portal is designed to keep your sales process seamless and efficient. This guide is your roadmap to navigating the THRYVE Portal with ease—offering clear, step-by-step instructions for every function you need. So, dive in, explore, and let us help you shine in every consultation!

Contents

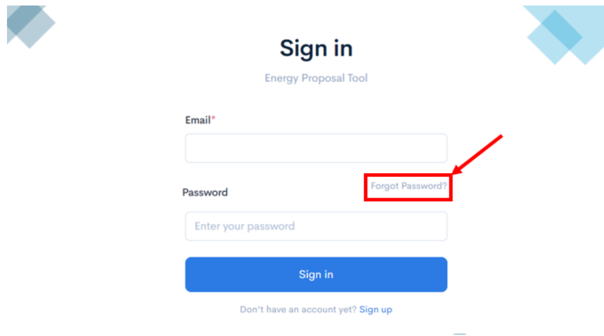
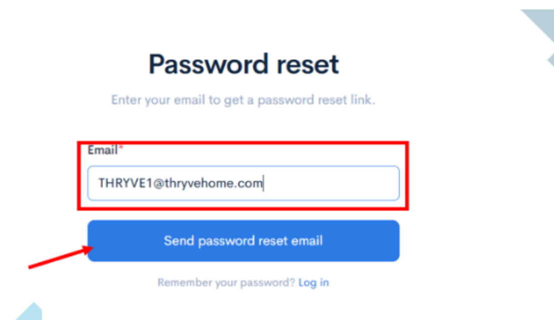
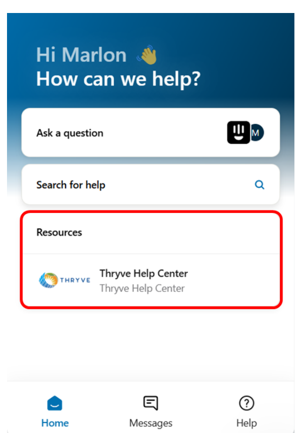
THRYVE Portal Sales Process Overview

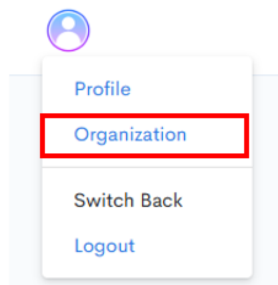
Understanding the flow of the sales process in the Portal is key to using it effectively. This overview breaks down the main steps, giving you a clear picture of what happens when—so you can navigate each stage with confidence. Think of it as your roadmap before diving into the how-to sections of this guide!

Note: At any time, use the SUNNY AI chat feature to access the *THRYVE Help Center* or ask a question.



1. ***Create a Lead***
   Create a New Lead in the Portal and change the lead status to *qualified*, which auto-requests a design.
2. ***Request an energy bill***
   During the introductory call, request a utility bill, which you can use during the consultation and will need to upload to the Portal later.
3. ***Create a New Quote***
   Create a New Quote during the consultation, even create one prior.
4. ***Design the system***
   From the Customer > Quotes tab, click New Quote to design the system.
5. ***Plug in your pricing***
   Set your pricing margin during the new quote creation when you see the gear icon ⚙.
6. ***Present the Proposal***
   Once the quote is saved, click Preview in the Quotes tab.
7. ***Send Proposal + credit application to customer***
   From the Quotes tab, copy/paste the MyTHRYVE URL link (which includes the GoodLeap financing/credit application) and email it to the customer.
8. ***Customer submits credit application***
   The customer can fill out and submit the GoodLeap financing/credit application in their own time from the MyTHRYVE link you emailed them.
9. ***Check application status***
   In the Customer > Finances tab you can see the application status.
10. ***Send Consumer Agreement***
    From the Customer > Finances tab, open the Approved application to send the Consumer Agreement and upload the utility bill.
11. ***Digital Project verification call (proof of identity)***
    GoodLeap calls the customer to verify their identity.

Admin: First, log in		
1.	Go to [the THRYVE Portal](https://dealer.thryve.energy/login) (https://dealer.thryve.energy/login)	⭐Bookmark it!
2.	Select ***Forgot Password?***	
3.	Enter your email address. Click ***Send password reset email***. You will receive an email with instructions on how to set up your password.	
4.	Check out the AI-powered help center by clicking on the ***Help*** icon.	
5.	You can: ● Ask a question ● Look up how-to guides in the THRYVE Help Center	

<table>
<tr><th colspan="3">Admin: Set up team users</th></tr>
<tr><td>1.</td><td>Open the THRYVE Portal and click the Profile icon. </td><td>
</td></tr>
<tr><td>2.</td><td>Select Organization.</td><td>
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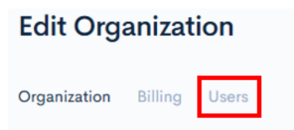
<tr><td>3.</td><td>Navigate to the Users tab.</td><td>
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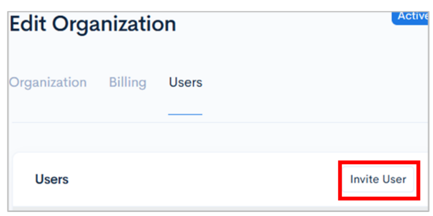
<tr><td>4.</td><td>Click on Invite User.</td><td>
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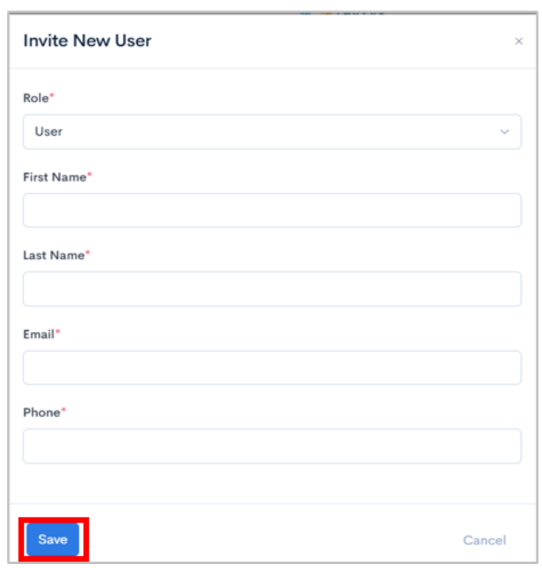
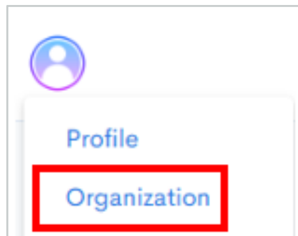
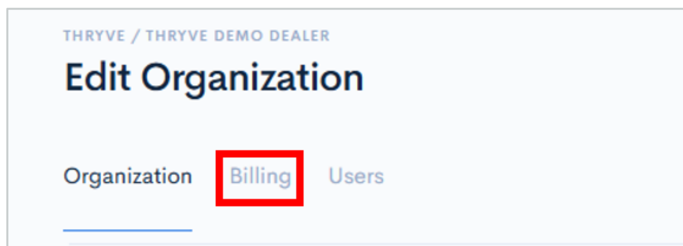
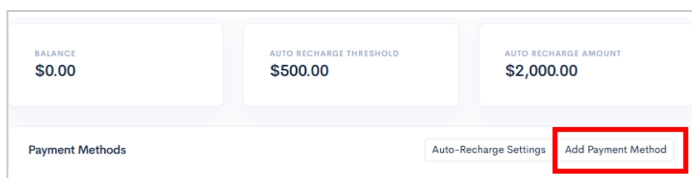
<tr><td>5.</td><td>Enter the new user’s information.

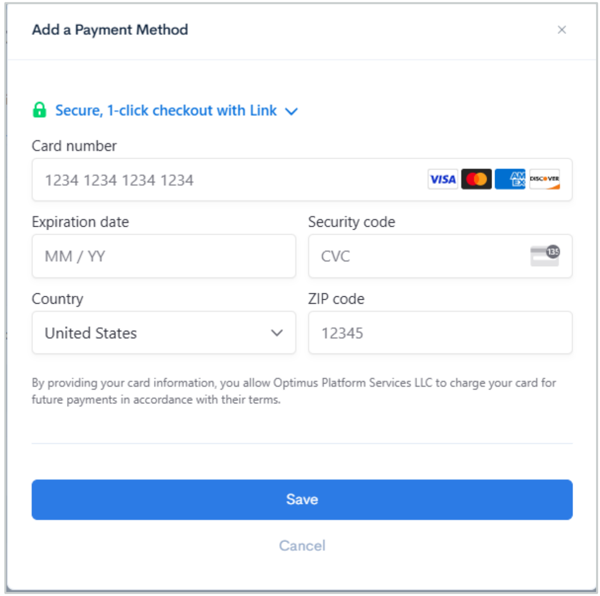
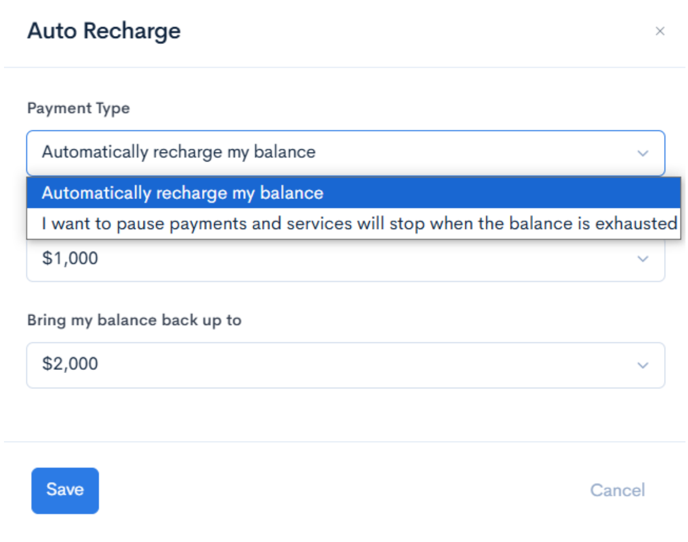
Click Save.</td><td>
</td></tr>
</table>

Admin: Add payment for designs and the Lead Program.

Designs: MaxFit designs cost $8 each and are billed monthly under the name "Optimus."

Lead Program: Pre-set appointments are prepaid—set a monthly budget. Pricing varies by state, so contact your Regional Account Manager for details.

1.	Log in to the THRYVE Portal and click the profile icon.	
2.	From the drop-down, select ***Organization***.	
3.	Click on the ***Billing*** tab.	
4.	On the ***Billing*** page, click ***Add Payment Method***.	

<table>
<tr><td>5.</td><td>Add your payment information and click Save.</td><td>
</td></tr>
<tr><td>6.</td><td>Click Auto-Recharge Settings to set spending limits and recharge balance.</td><td>
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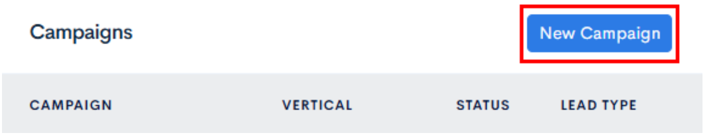
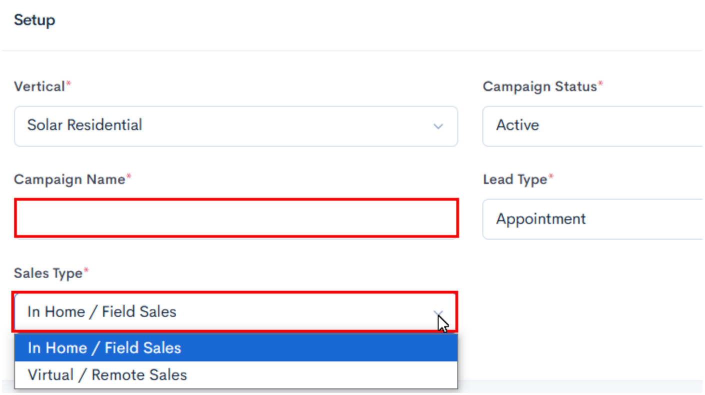
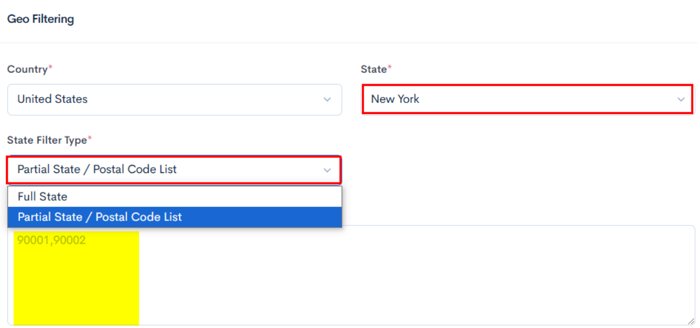
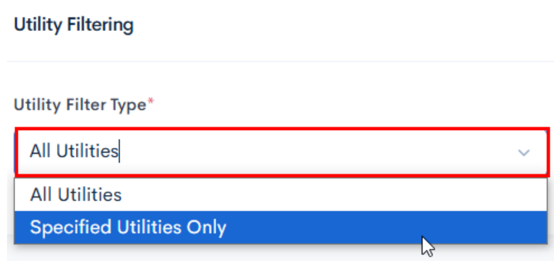
Admin: Create campaign for Leads Program (pre-set appointments)

THRYVE

To sign up for pre-set appointments, start by adding your payment information (see the ***Admin: Add payment*** section above). Next, create a CAMPAIGN for your pre-set appointments. If you operate in multiple states, you'll need a separate campaign for each one. Likewise, if you offer both virtual and in-home appointments, set up separate campaigns for each. Use the following steps:

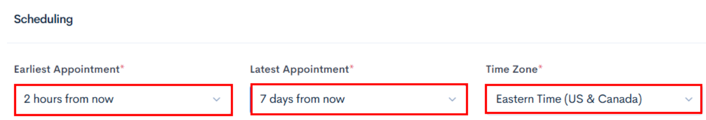
1.	Click ***Campaigns*** from the top navigation bar.	
2.	Scroll down to the ***Campaigns*** section and click ***New Campaign***.	
3.	In the ***Setup*** section, name your campaign and select the ***Sales Type*** from the drop-down menu. ***Note:*** If you offer both virtual and in-home appointments, you'd set up a separate campaign for each.	
4.	In the ***Geo Filtering*** section, select the ***State*** in which you want your lead appointments. From the ***State Filter Type*** drop-down, choose ***Full State*** (if you take appointments for the entire state) or ***Partial State/Postal Code List***. If the latter, list the ***Postal Codes*** in which you take appointments. ***Note:*** If you operate in multiple states, create a separate campaign for each one.	

5. In the ***Utility Filtering*** section, select whether you accept ***All Utilities*** or ***Specified Utilities Only*** (and then select which utilities you work in).



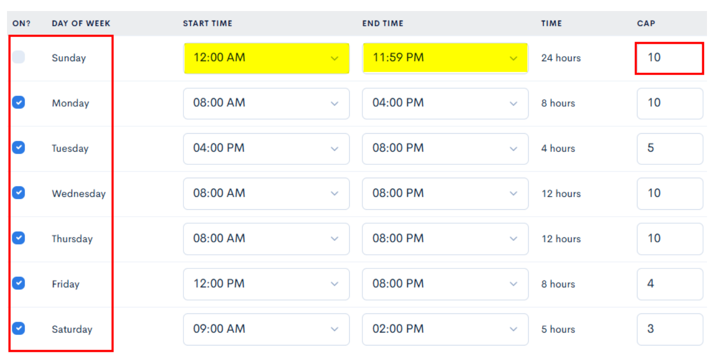
6. In the ***Scheduling*** section, select the earliest time you're available for appointments and the latest time—how far in advance appointments can be booked.

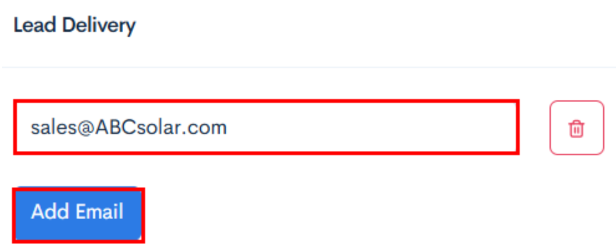
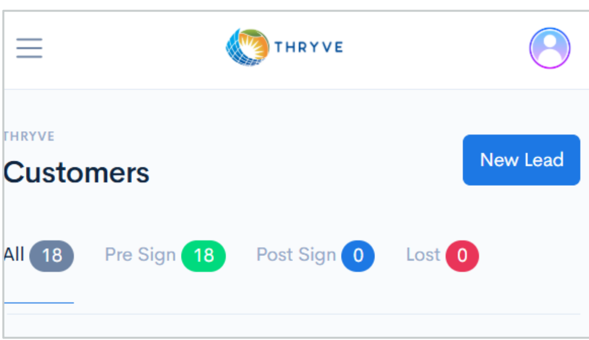
Choose the appropriate ***Time Zone***.

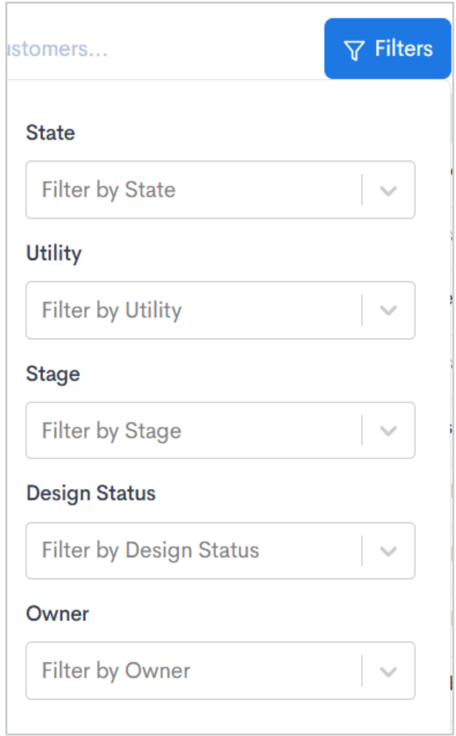
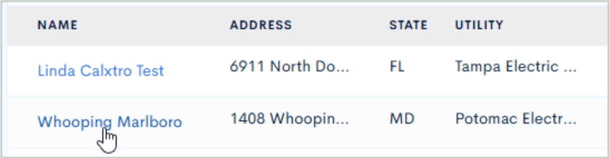
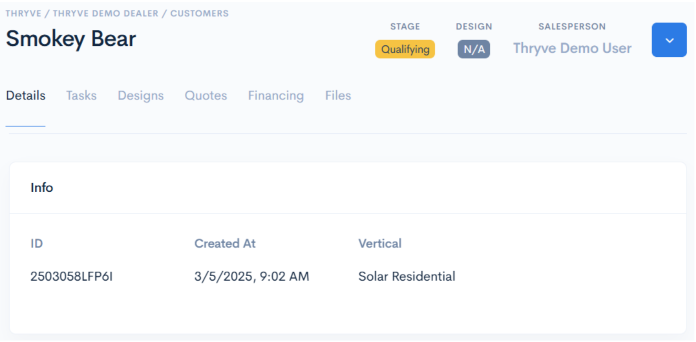


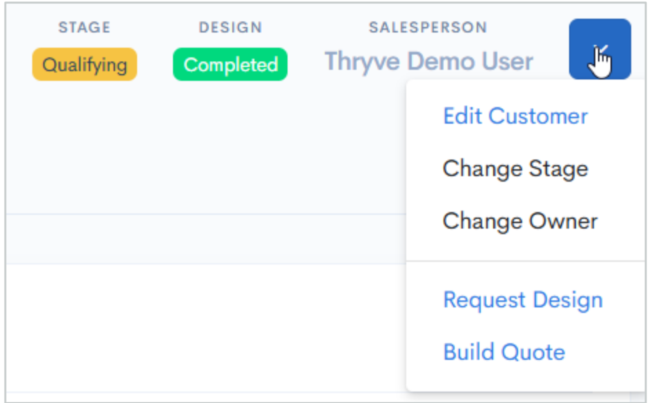
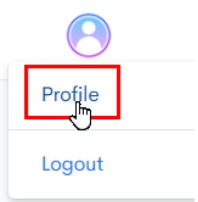
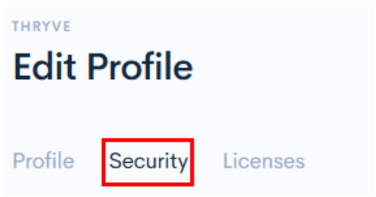
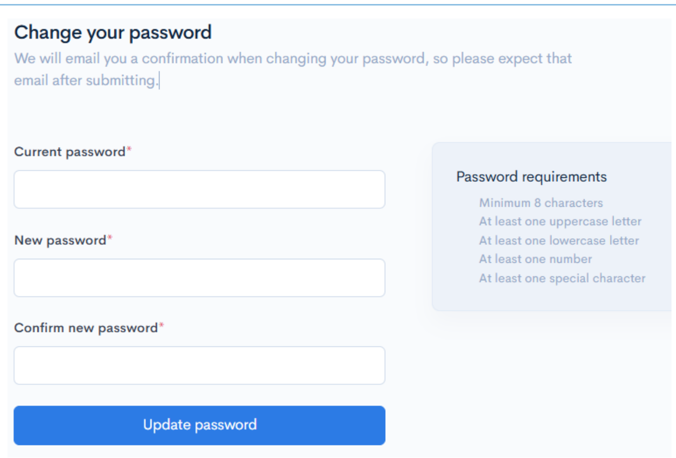
7. Select the days you're available for appointments, then set your start and end times.

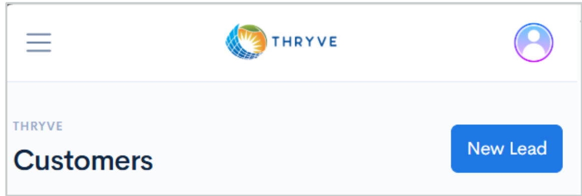
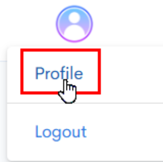
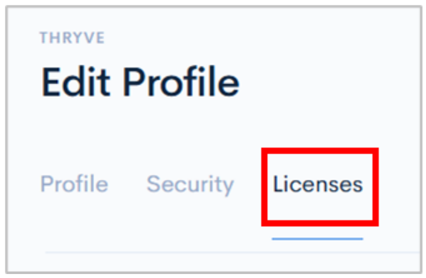
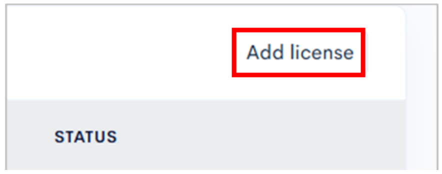
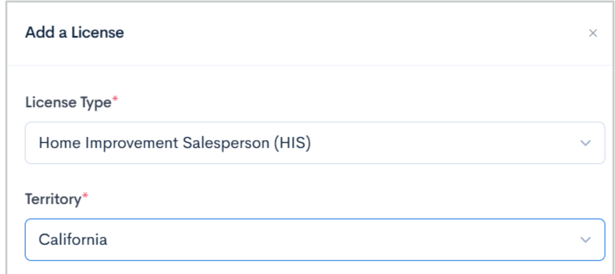
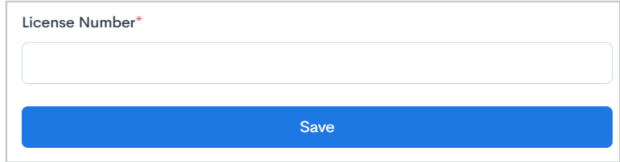
In the ***CAP*** field, enter the maximum number of appointments you can take.

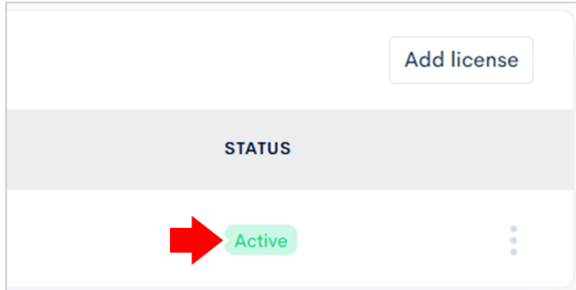
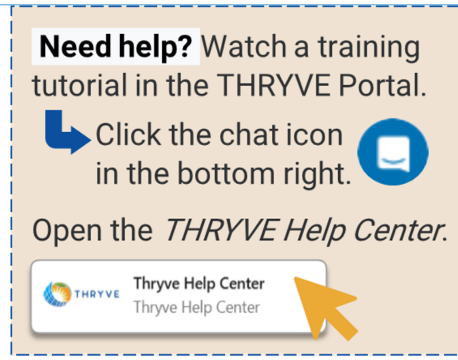
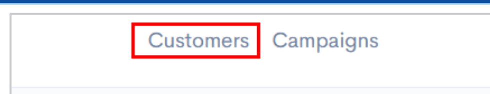
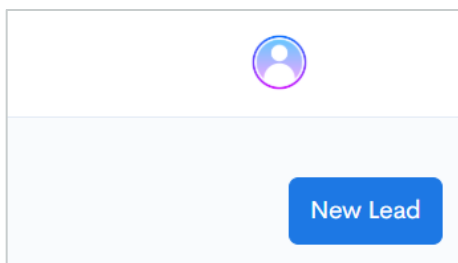


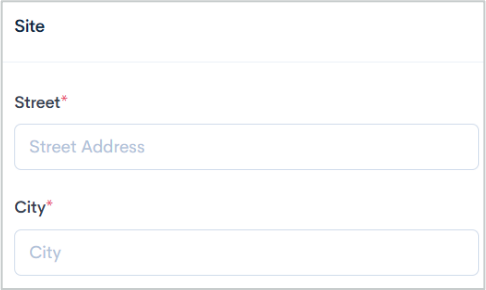
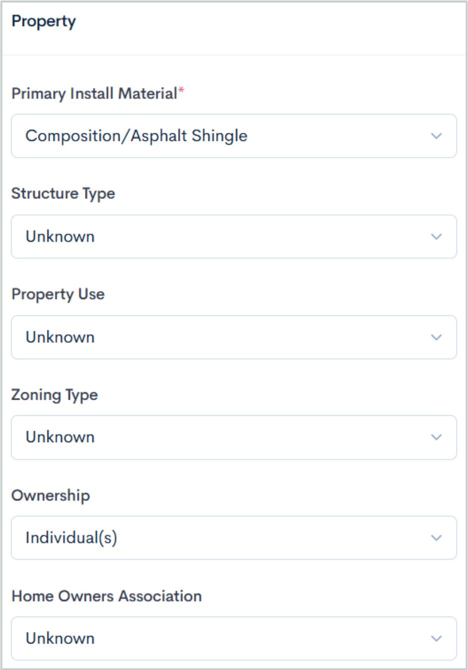
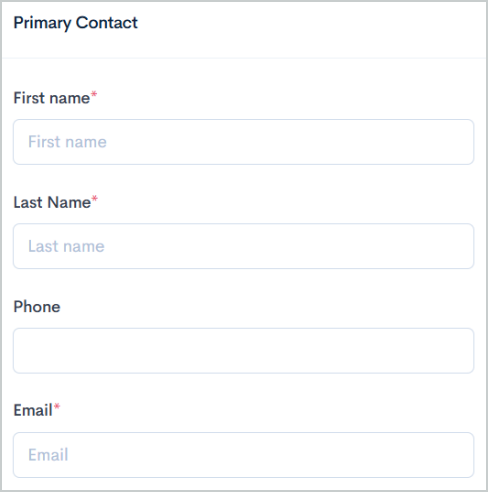
8.	Under ***Lead Delivery***, enter the email address lead appointments should be sent to. Click ***Add Email*** to enter more than one. Click ***Save***.	
Start: Customer page (homepage) overview		
1.	The landing page opens on the ***Customer*** tab. Filter your Customer list to view ***Pre Sign***, ***Post Sign*** or ***Lost***.	

2.	Filter your customers further with the ***Filters*** tool on the right side.	
3.	Click on a customer name to view their account.	
4.	The ***Customer Details*** page opens. View customer info.	

5.	For quick access to certain actions, click the blue caret on the right. Here you can edit customer info, change the lead stage or owner, request a design, or begin building a quote.	
Start: Edit Profile + Security settings		
1.	Click the Profile icon.	
2.	Click ***Profile***.	
3.	Click ***Security***.	
4.	Edit your password. Click ***Update password***.	
Start: Add Salesperson licenses (as required in certain states)		

1.	Click the ***Profile*** icon.	
2.	Click ***Profile***.	
3.	Click the ***Licenses*** page.	
4.	Click ***Add license***.	
5.	Select the drop-down choice for ***License Type*** and ***Territory***.	
6.	Enter the ***License Number***, then click ***Save***.	

7.	The License Status now reads ***Active***.	
		
Leads: Create a Lead		
1.	Click ***Customers*** from the top navigation.	
2.	Click ***New Lead***.	
3.	In the ***Setup*** section, open the ***Stage*** drop-down menu. Select ***Qualified*** from the drop-down to auto-request a design.	

<table>
<tr><td>4.</td><td>Enter the site address, including City, State, and Zip Code.</td><td>
</td></tr>
<tr><td>5.</td><td>Click the drop-downs to complete the Property details, including Primary Install Material, Structure Type, Property Use, Zoning Type, Ownership, and Home Owner's Association.</td><td>
</td></tr>
<tr><td>6.</td><td>For Primary Contact, enter the customer's details, including First Name, Last Name, Phone, and Email.</td><td>
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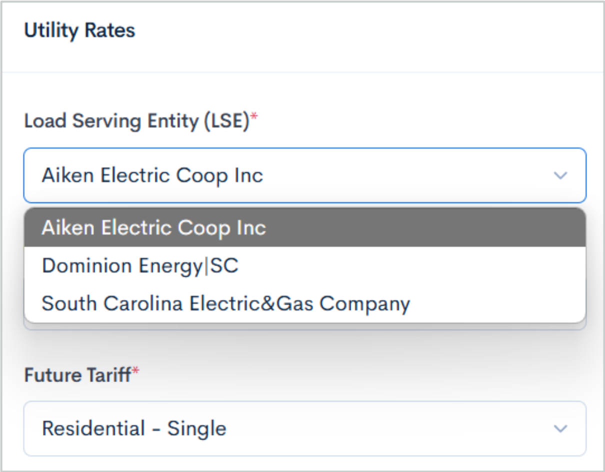
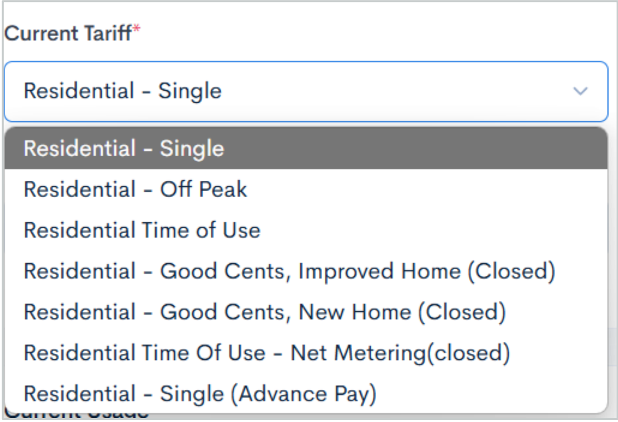
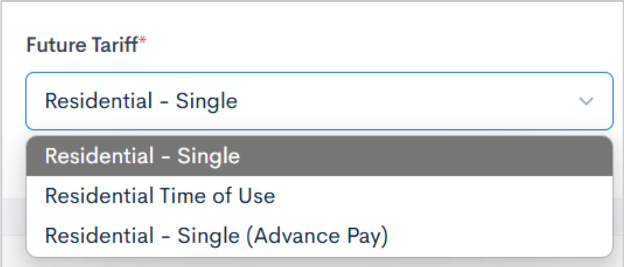
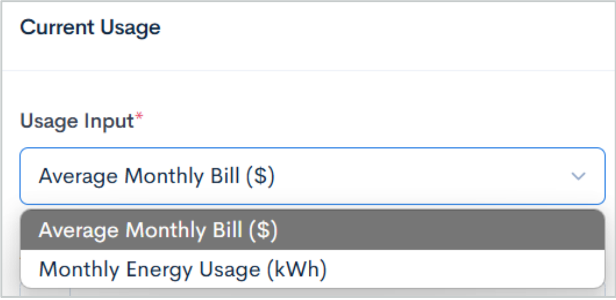
7.	For ***Utility Rates***, select the ***Load Serving Entity*** from the drop-down menu.	
8.	For ***Current Tariff***, choose the customer's current charge rate.	
9.	For ***Future Tariff***, choose the assumed future rate.	
10.	In the ***Current Usage*** section, select how you want the ***Usage Input***—as an ***Average Monthly Bill*** or exact ***Monthly Energy Usage***.	

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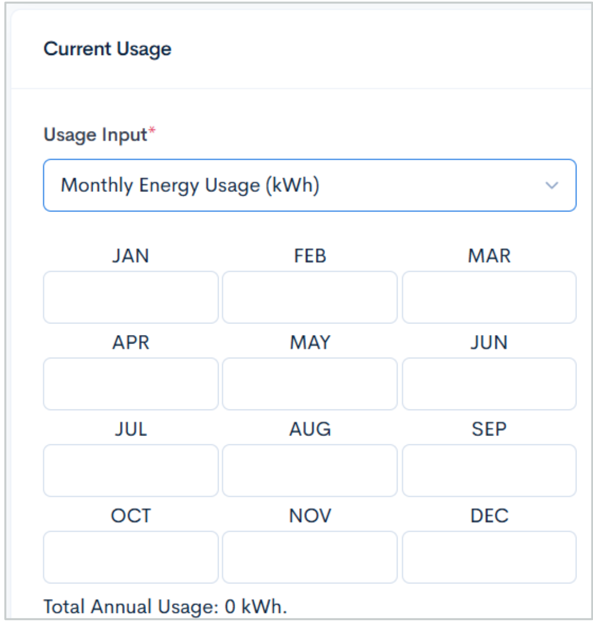
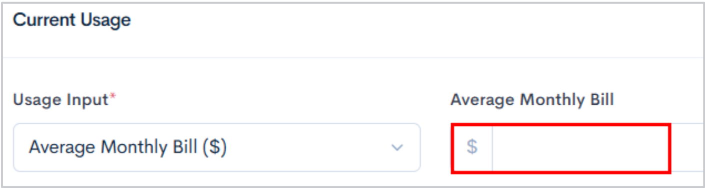
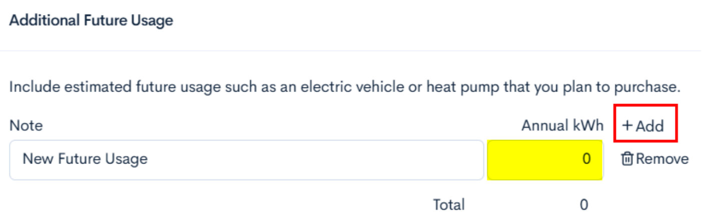
<tr>
<td>11.</td>
<td>If the Monthly Energy Usage is used, complete each month's field for kWh usage.</td>
<td>
</td>
</tr>
<tr>
<td>12.</td>
<td>If the Average Monthly Bill is used, enter the value.</td>
<td>
</td>
</tr>
<tr>
<td>13.</td>
<td>If Additional Future Usage is anticipated, click Add to populate the field.

Click Save.</td>
<td>
</td>
</tr>
</table>

Need help? Watch a training tutorial in the THRYVE Portal.

Click the chat icon in the bottom right.

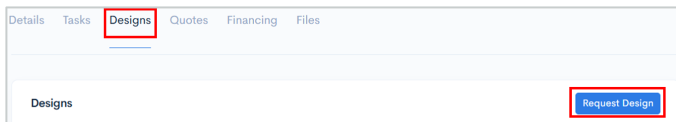
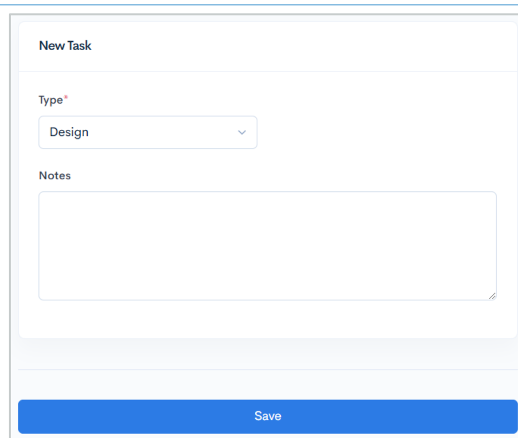
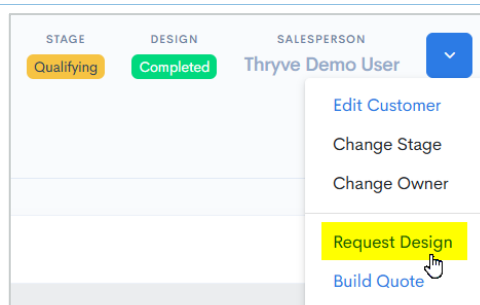
Open the *THRYVE Help Center.*

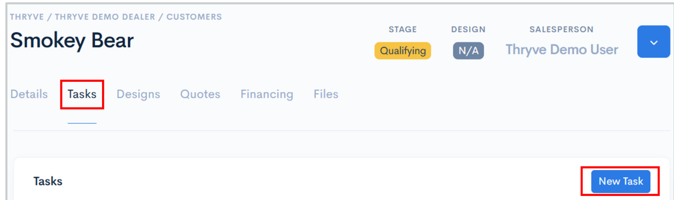
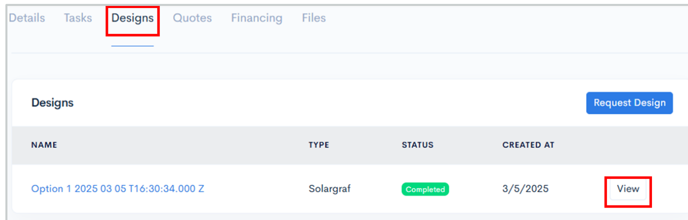
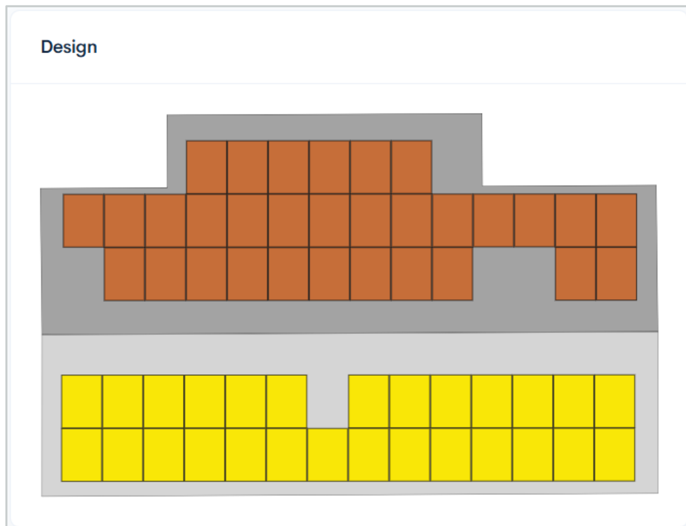
Designs: Request a design

You do not have to request a design. You may also design your own system and upload it manually.

Need help? Watch a training tutorial in the THRYVE Portal.
Click the chat icon in the bottom right.
Open the *THRYVE Help Center.*
Thryve Help Center
Thryve Help Center

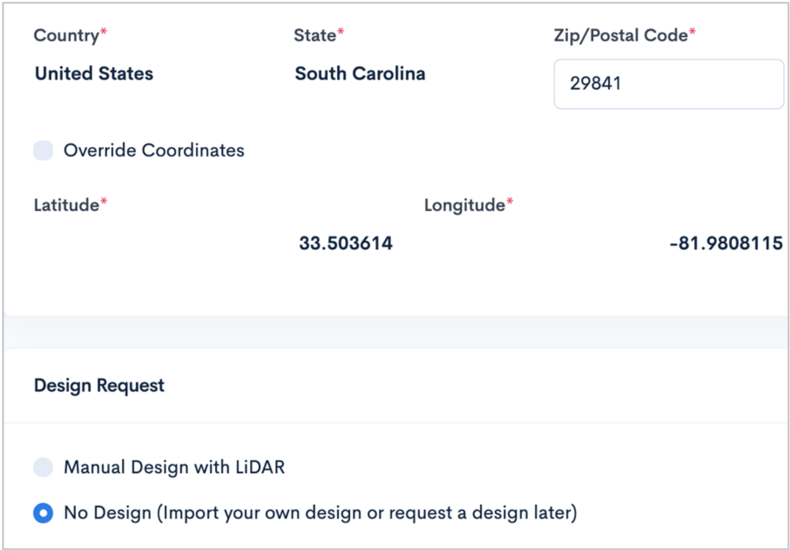
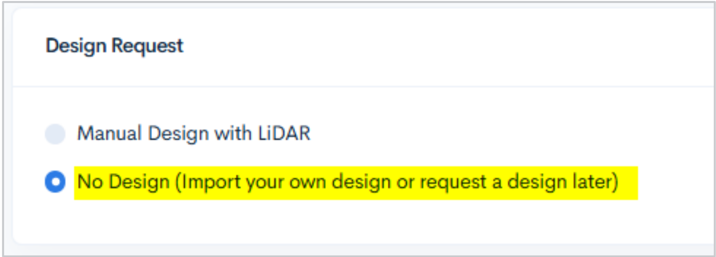
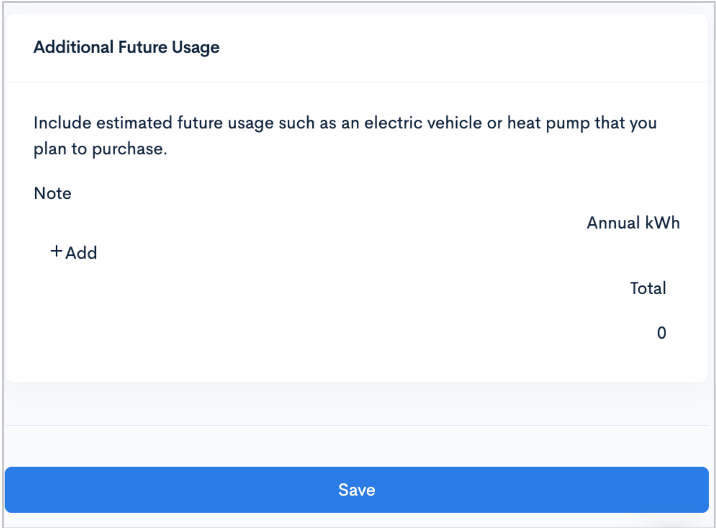
Note: This is an alternative way to request a design. The primary method is updating the Lead Status from ***Lead*** to ***Qualified***, which automatically ***triggers*** a design request. If you didn't update the Lead Status, you can request a design manually using the steps below. Both methods work.

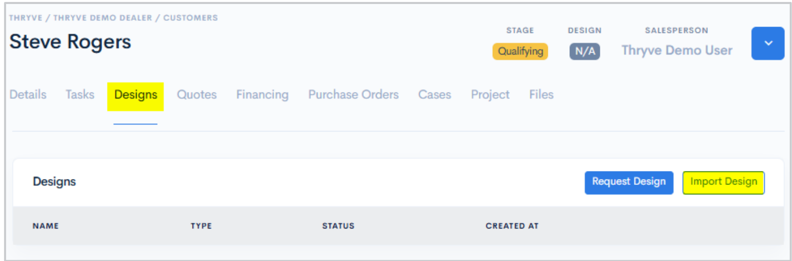
1.	Once a lead has been created, click on ***Designs*** on the navigation bar.	
2.	Click ***Request Design***. ***Note:*** If you have an existing Design. Select ***No Design.*** Follow steps in the SUNNY Guide for ***Import a Design.***	
3.	Enter any Notes, if applicable. Click ***Save***. The MaxFit design is ready in 24 hours or less.	
4.	Alternatively, a design can be requested by clicking the blue caret to the right of the ***Customer*** page.	

5.	Alternatively, a design can be requested on the ***Tasks*** page.	
Designs: View the MaxFit design		
1.	Click on ***Designs*** in the navigation bar. Click ***View*** to open your design.	
2.	You can view the MaxFit design and monthly solar access.	

Designs: Import a manual or custom design

You do not have to request a design. You may also design your own system and upload it manually.

<table>
<tr>
<td>1.</td>
<td>To start, click New Lead. On the Create a New Lead section, input the address, then scroll down to Design Request.</td>
<td>
</td>
</tr>
<tr>
<td>2.</td>
<td>For Design Request, select No Design.</td>
<td>
</td>
</tr>
<tr>
<td>3.</td>
<td>Add property info, utility rates, etc., and click SAVE.</td>
<td>
</td>
</tr>
</table>

<table>
<tr>
<td>4.</td>
<td>Click on the Design tab. Click Import Design.</td>
<td>
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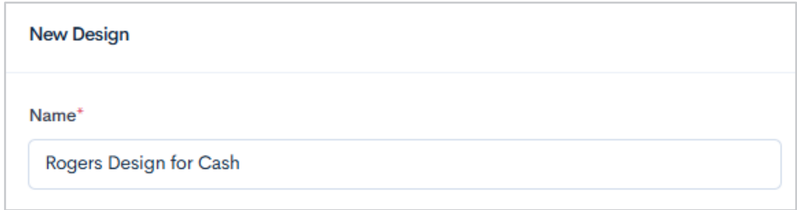
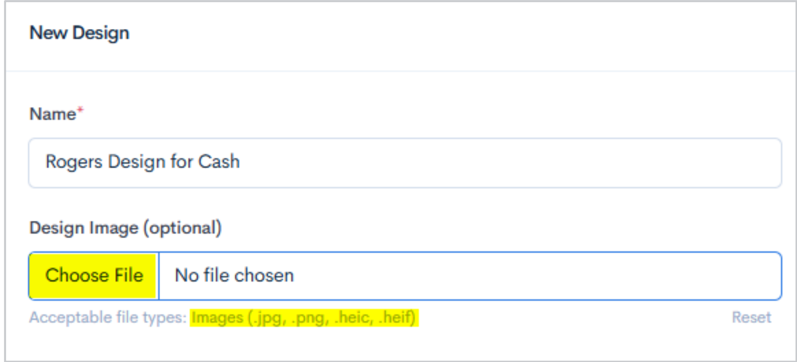
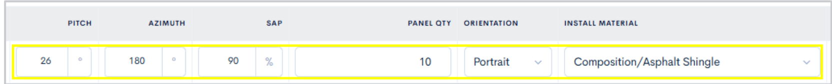
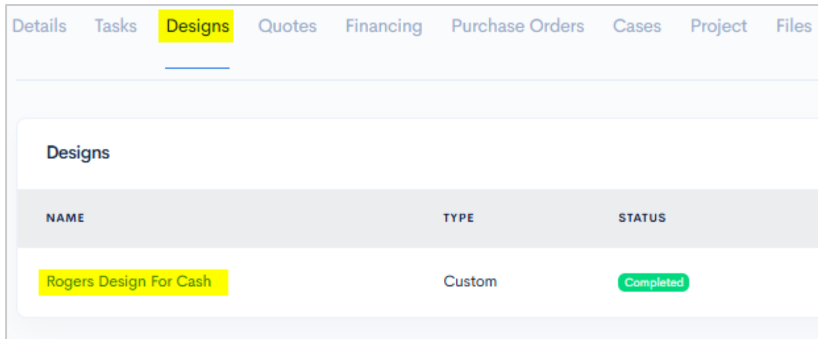
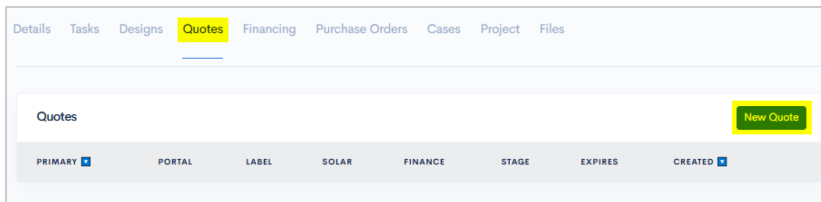
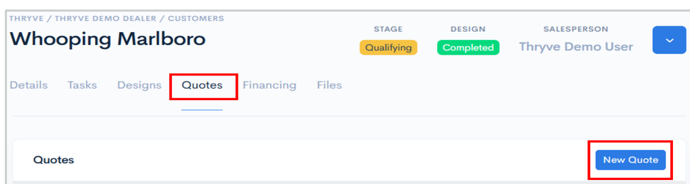
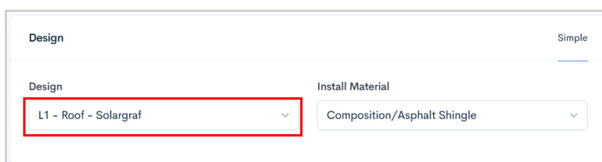
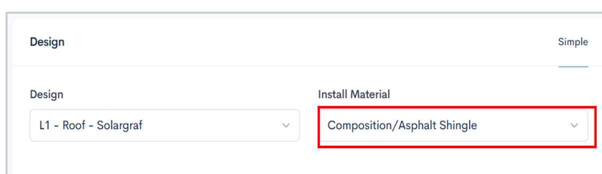
<tr>
<td>5.</td>
<td>Name your design.</td>
<td>
</td>
</tr>
<tr>
<td>6.</td>
<td>Upload your design file.
a. Click Choose File.
b. Select the file you wish to upload.
Note: Acceptable file types are images (.jpg, .png, .heic, .heif)</td>
<td>
</td>
</tr>
<tr>
<td>7.</td>
<td>Input the design details: Pitch, Azimuth, SAP (Solar Access Percentage), Panel Quantity, Orientation, and Install Material.</td>
<td>
</td>
</tr>
<tr>
<td>8.</td>
<td>To add a roof, click the + on the right.
Click SAVE.
The Shade Report section will open.</td>
<td>
</td>
</tr>
</table>

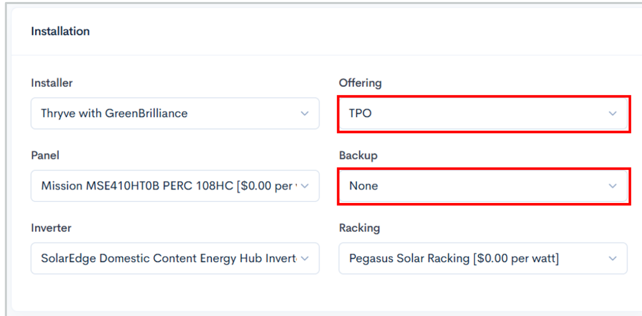
9.	Click the ***Design*** tab to see your Design listed.	
10.	Click the ***Quotes*** tab to begin quoting. Input your quote info and click ***SAVE***.	

Quotes: Design a system and build a quote		
1.	Click on ***Quotes*** on the navigation bar. Click ***New Quotes***.	
2.	From the ***Design*** drop-down list, select the MaxFit design (if you requested more than one).	
3.	From the ***Install Material*** drop-down list, select the roof type.	

<table>
<tr>
<td>4.</td>
<td>In the Installation section:

● Offering: Select the financial option (TPO for Lease/PPA or Cash &Loan).

● Backup: Select if your customer is interested in battery backup.

● If your dealership has system product options, you can select those.</td>
<td>
</td>
</tr>
<tr>
<td>5.</td>
<td>Scroll down to the System Design section. Layout is the first tab.

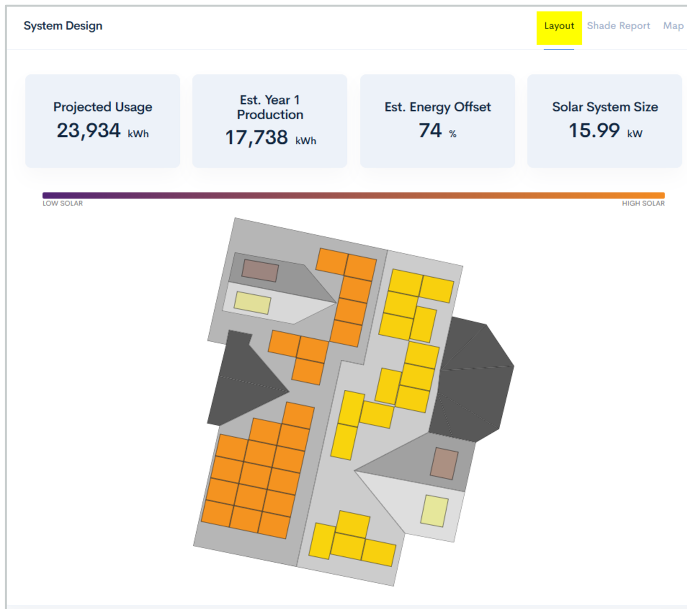
Design the array layout:

● Click on a panel to select or deselect it.

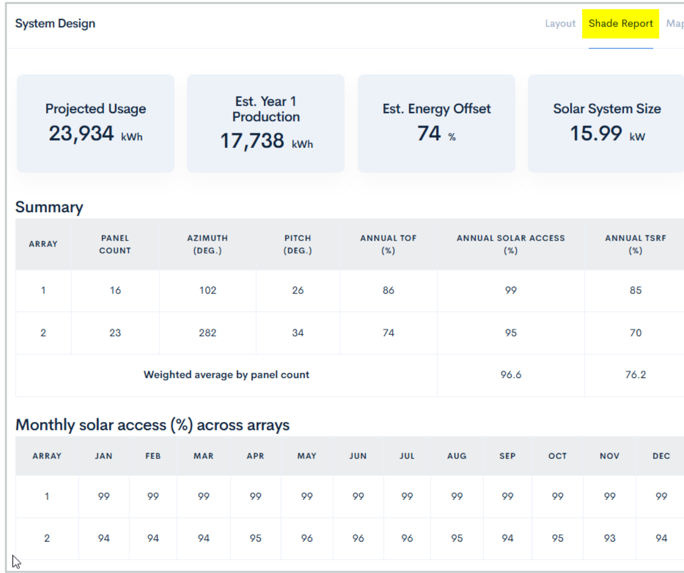
● Right-click on a panel to select the entire roof plane of the array.

● Yellow panels = more sun exposure.

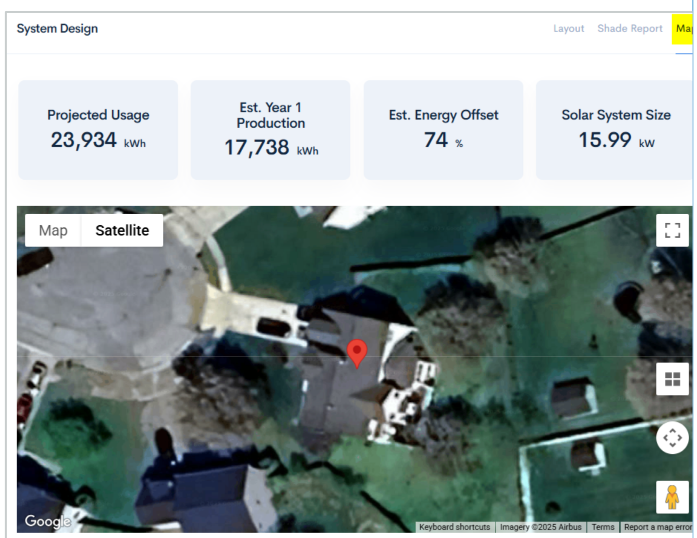
● Orange panels = less sun exposure.

● The blue boxes at the top show the energy offset and system size based on what panels are selected.</td>
<td>
</td>
</tr>
</table>

6. The second tab is the ***Shade Report***.

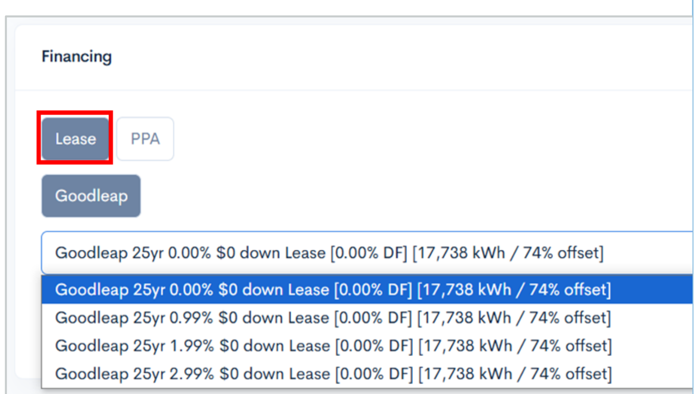


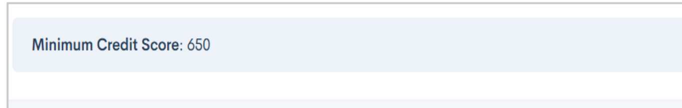
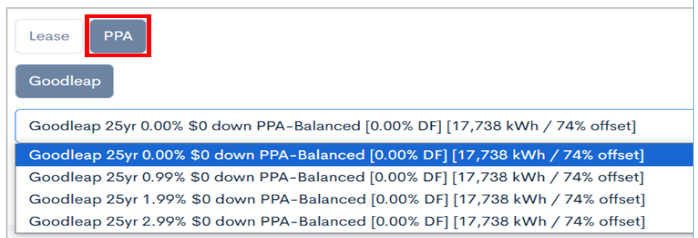
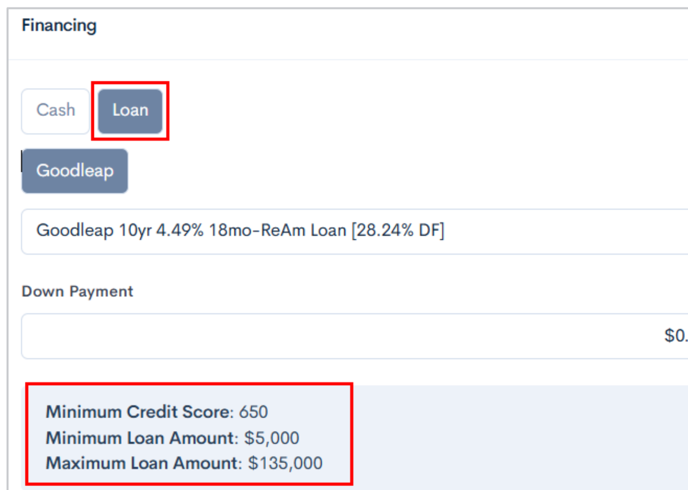
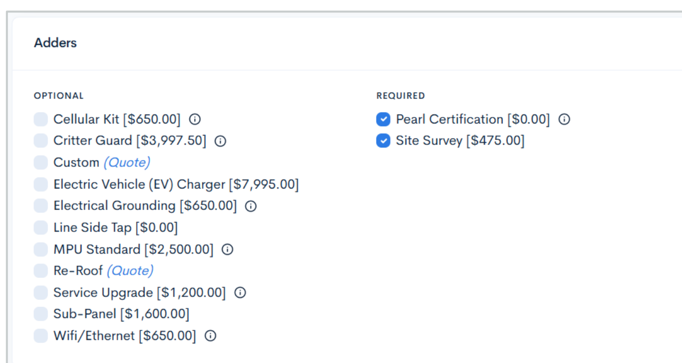
7. The third tab of the ***System Design*** section is ***Map***.



8. Scroll down to the ***Financing*** section.

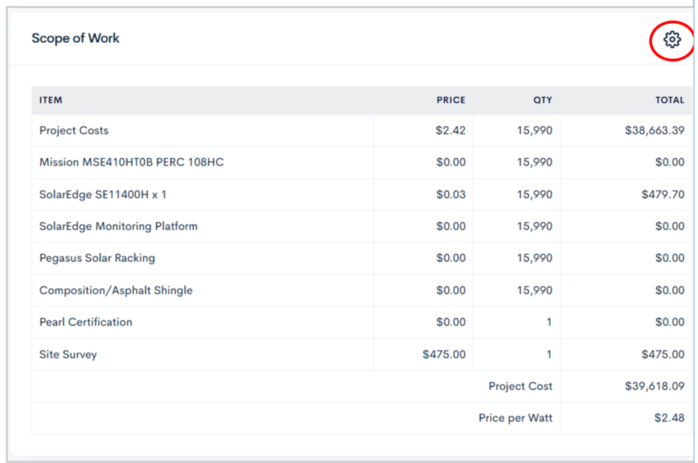
Click on ***Lease*** to populate the drop-down with GoodLeap's Lease options.



<table>
<tr>
<td></td>
<td>Minimum Credit Score is listed underneath.</td>
<td>
</td>
</tr>
<tr>
<td></td>
<td>Click on PPA to populate the drop-down with GoodLeap's PPA options.</td>
<td>
</td>
</tr>
<tr>
<td></td>
<td>Click on Loan to populate the drop-down with GoodLeap's Loan options, including min/max loan amount.</td>
<td>
</td>
</tr>
<tr>
<td>9.</td>
<td>In the Adders section, select your adders.</td>
<td>
</td>
</tr>
</table>

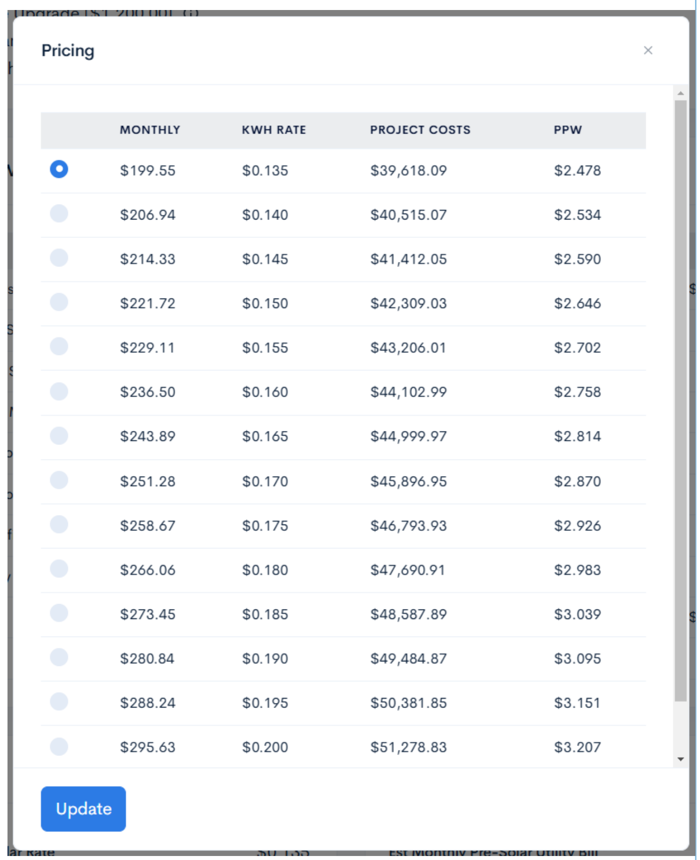
10. The ***Scope of Work*** section shows the costs of work and products.

Click the gear icon to open the ***Pricing*** window.



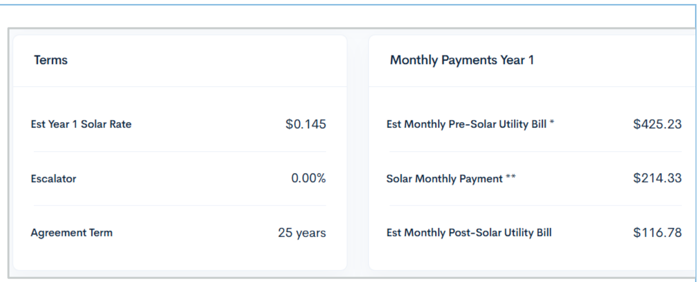
11. Select the price per watt that your dealership charges (your margin).

Click ***Update***.



12. The ***Terms*** section presents the terms of the selected Lease or PPA.

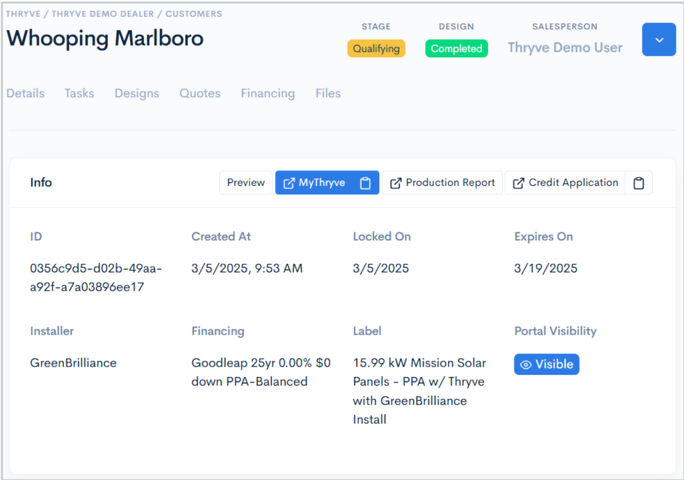
Monthly Payments Year 1 present what the customer will pay in their first year.



13. Click ***Save*** at the very bottom.

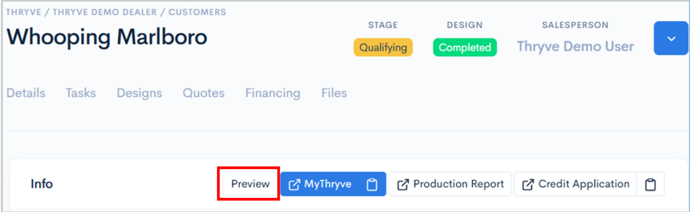
Your quote ***Info*** opens.

Need help? Watch a training tutorial in the THRYVE Portal.
Click the chat icon in the bottom right.
Open the *THRYVE Help Center*.
Thryve Help Center
Thryve Help Center



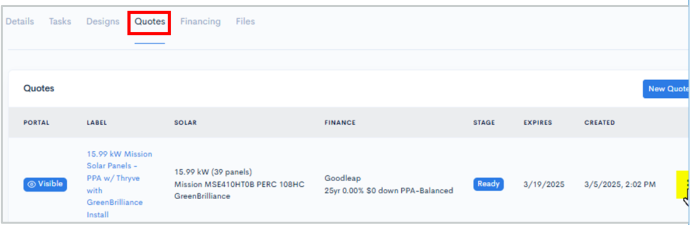
Quotes: Present the Solar Proposal

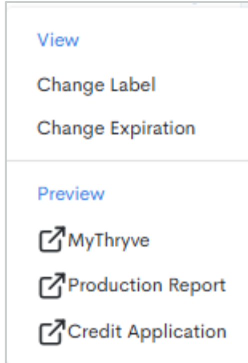
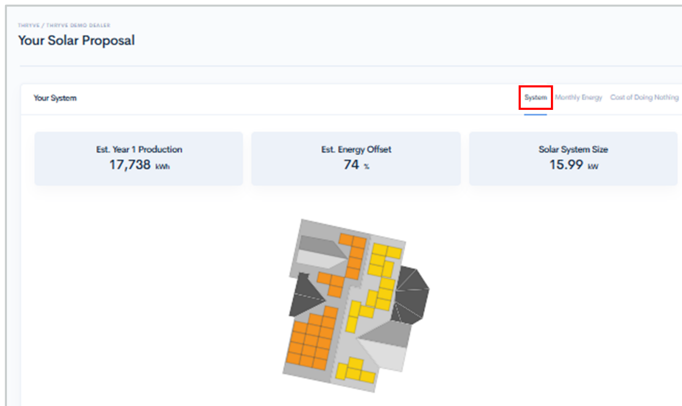
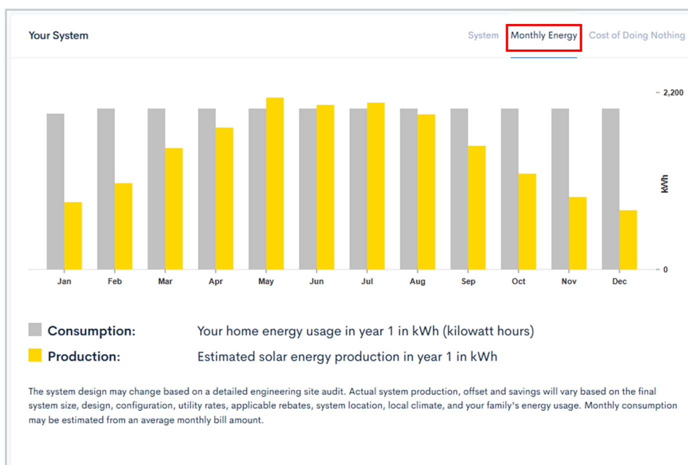
1. If continuing from the ***Info*** section above, click ***Preview***.



2. Alternatively, to open the quote, click the ***Quotes*** tab.

Click the kebab menu (three dots) to the right of your desired quote.



3.	In the drop-down menu, select ***Preview*** to open the Solar Proposal or click ***View*** to open the ***Quote Info*** page.	
4.	Note the three tabs on the right—***System*** shows the system.	
5.	***Monthly Energy*** shows the estimated energy consumption and system production over Year 1.	

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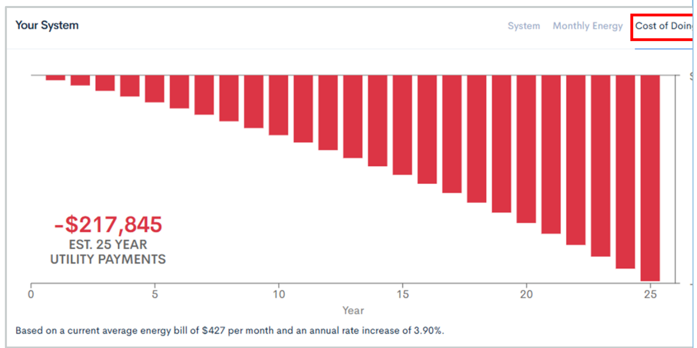
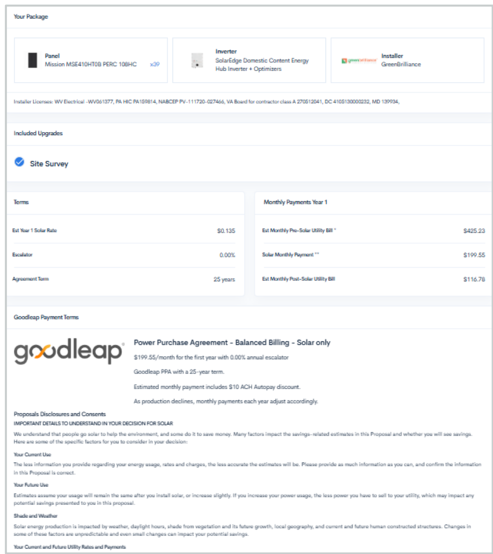
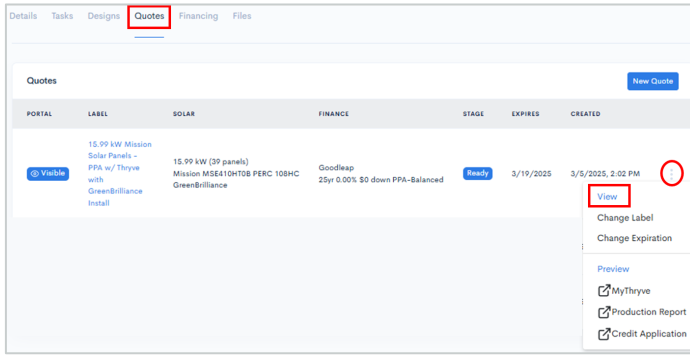
6. ***Cost of Doing Nothing*** shows the estimated amount paid to the utility over 25 years based on the customer's current average bill.



7. Scrolling down, the Solar Proposal summarizes products, terms, monthly payments Year 1, and GoodLeap's terms for the selected finance option, plus a section on installation steps.



8. To return to the Quote Info, click the browser back button, or click the ***Quotes*** tab on the navigation bar, then click the kebab menu next to the desired quote and select ***View***.



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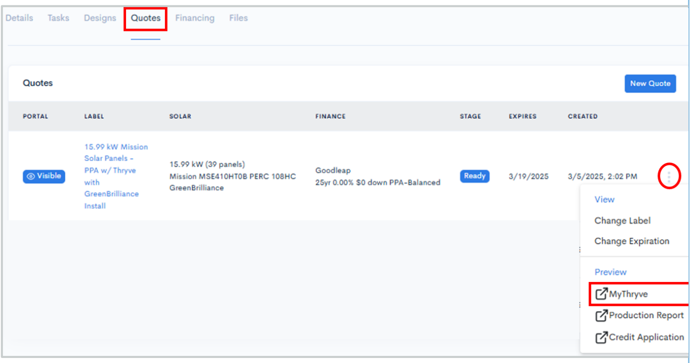
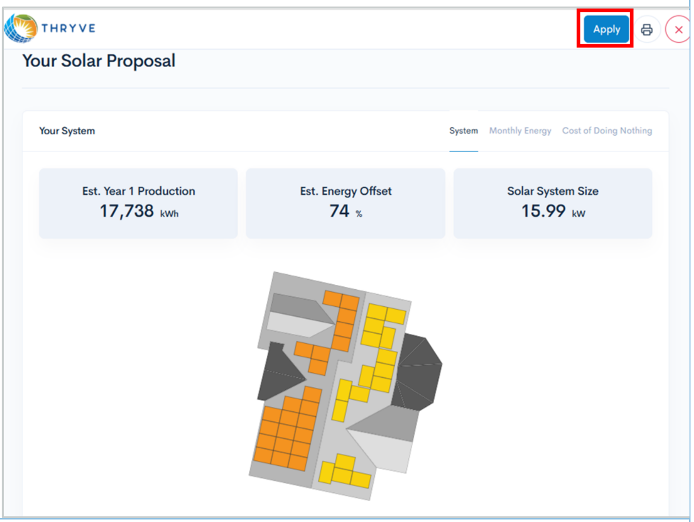
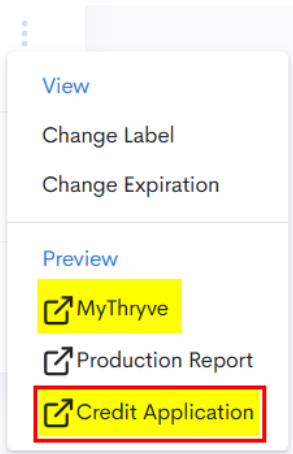
<table>
<tr><th colspan="3">Quotes: Send the Solar Proposal + credit application to the customer</th></tr>
<tr><td>1.</td><td>On the Customer page, click the Quotes tab on the navigation bar, then click the kebab menu (three dots ⋮) next to the desired quote.

From the drop-down menu, select MyThryve.</td><td>
</td></tr>
<tr><td>2.</td><td>A new browser tab opens with the Solar Proposal.

Copy the URL and paste it into an email to your customer.

The Solar Proposal includes an Apply link for the GoodLeap Financial Application for those applying for lease or PPA credit. (For Loan, see the Note.⬇)</td><td>
</td></tr>
<tr><td>3.</td><td>Note: The Apply link does <u>not</u> work for the GoodLeap <u>Loan</u>. If your customer is applying for a GoodLeap Loan, copy + paste the Credit Application link separately from the MyThryve Solar Proposal.

The Credit Application link can be used to apply for any GoodLeap financing.</td><td>
</td></tr>
</table>

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4.

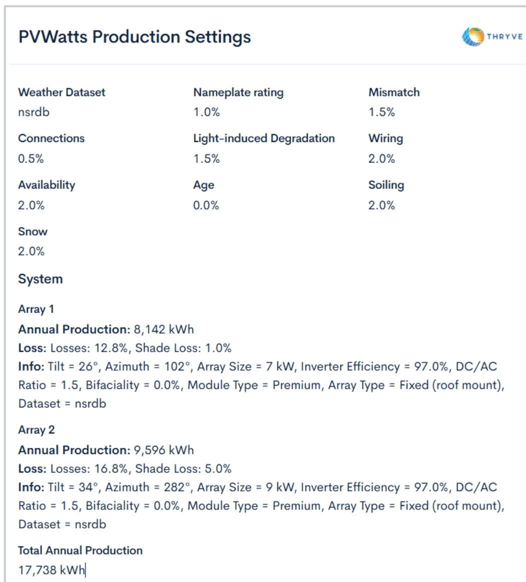
Need help? Watch a training tutorial in the THRYVE Portal.

Click the chat icon in the bottom right.

Open the *THRYVE Help Center.*

Quotes: View the Production Report

1. The ***Production Report*** shows the quoted system's PV Watts production settings broken down by roof array.


PVWatts Production Settings

Weather Dataset
nsrdb

Nameplate rating
1.0%

Mismatch
1.5%

Connections
0.5%

Light-induced Degradation
1.5%

Wiring
2.0%

Availability
2.0%

Age
0.0%

Soiling
2.0%

Snow
2.0%

System

Array 1
Annual Production: 8,142 kWh
Loss: Losses: 12.8%, Shade Loss: 1.0%
Info: Tilt = 26°, Azimuth = 102°, Array Size = 7 kW, Inverter Efficiency = 97.0%, DC/AC Ratio = 1.5, Bifaciality = 0.0%, Module Type = Premium, Array Type = Fixed (roof mount), Dataset = nsrdb

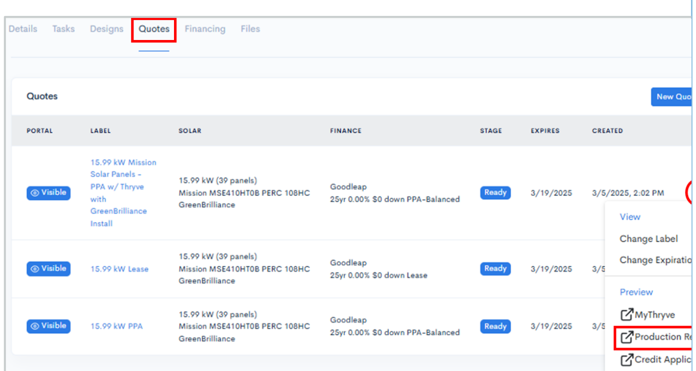
Array 2
Annual Production: 9,596 kWh
Loss: Losses: 16.8%, Shade Loss: 5.0%
Info: Tilt = 34°, Azimuth = 282°, Array Size = 9 kW, Inverter Efficiency = 97.0%, DC/AC Ratio = 1.5, Bifaciality = 0.0%, Module Type = Premium, Array Type = Fixed (roof mount), Dataset = nsrdb

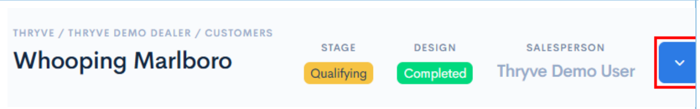
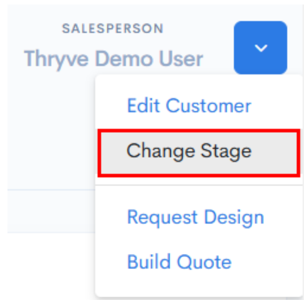
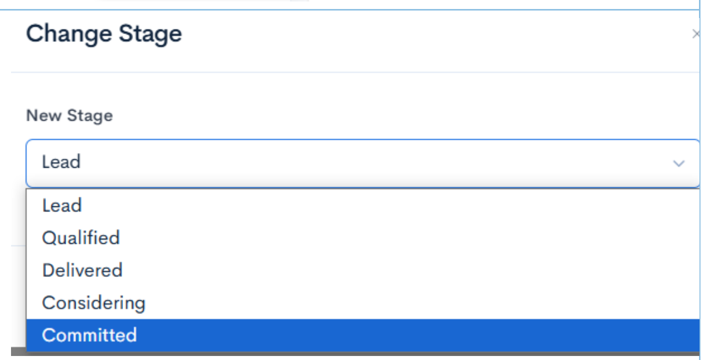
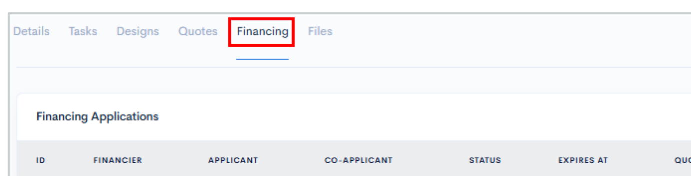
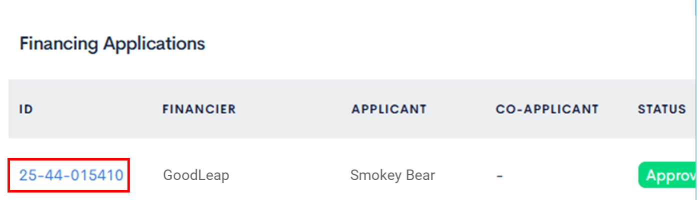
Total Annual Production
17,738 kWh

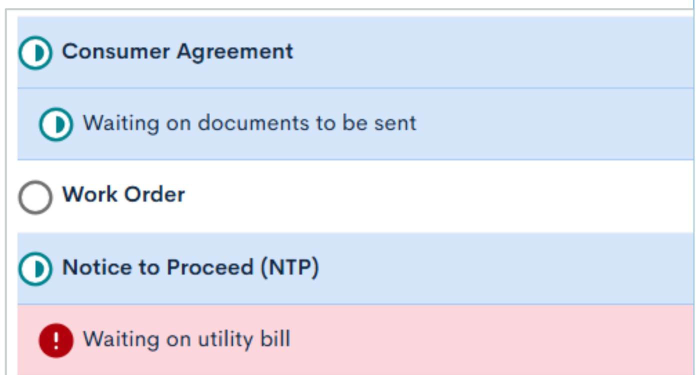
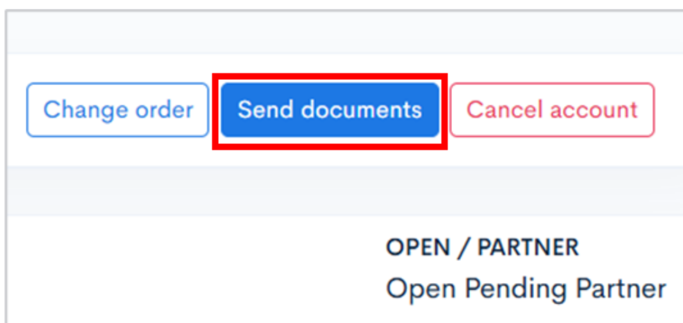
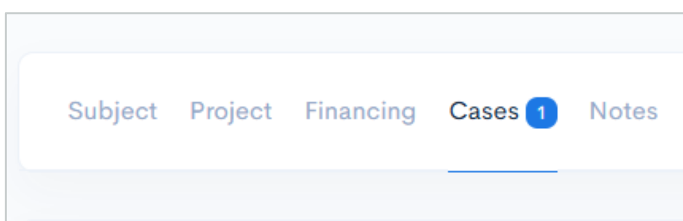
2. To view the report, click the ***Quotes*** tab on the Customer page.

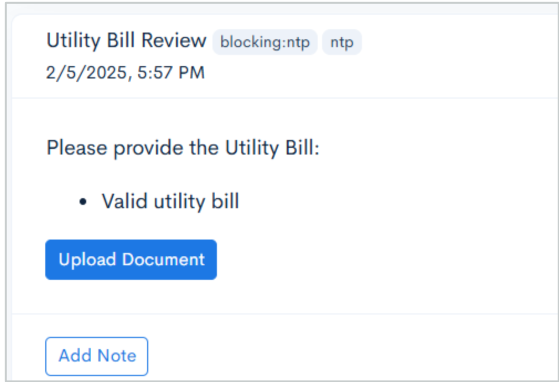
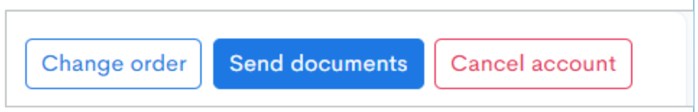
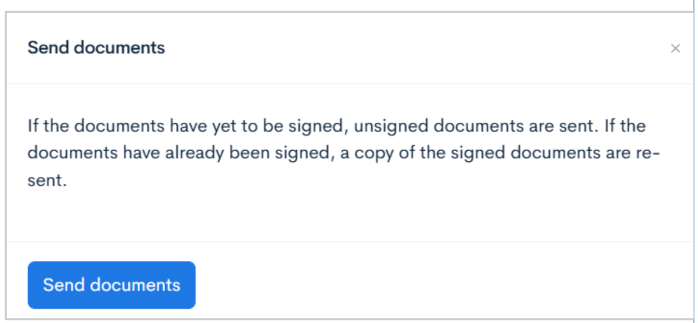
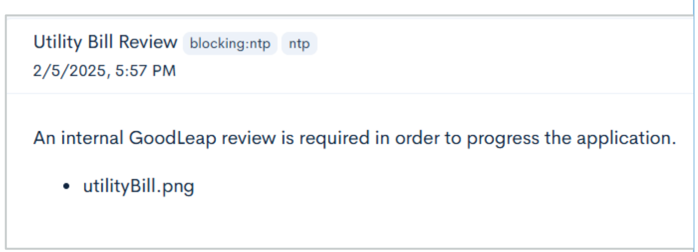
Click the kebab menu (three dots) next to the desired quote.

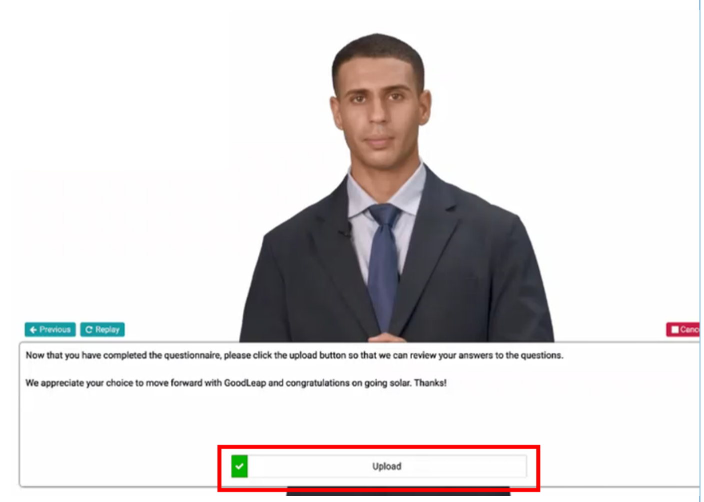
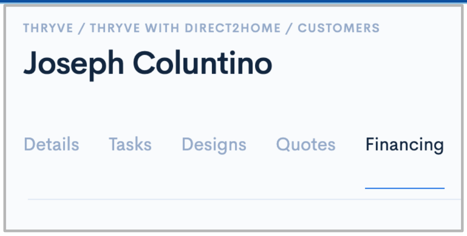
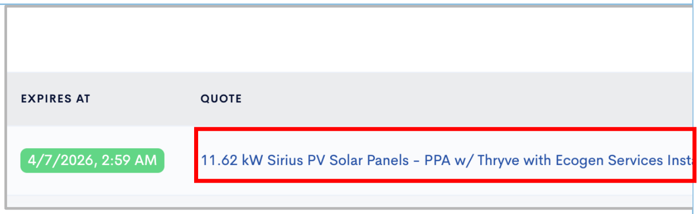
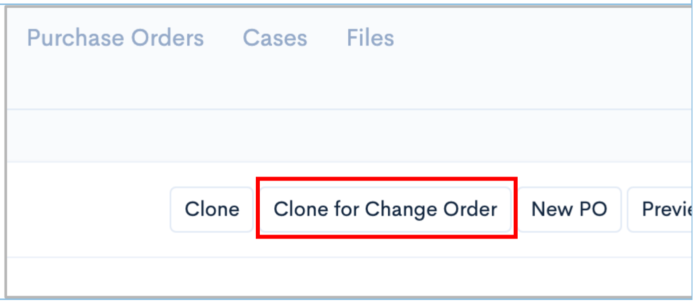
From the drop-down menu, select ***Production Report***.



<table>
<tr><th colspan="3">Quotes: Change the account stage</th></tr>
<tr><td>1.</td><td>Keep your customer stages updated for better overview.
On the customer page, click the blue caret.</td><td>
</td></tr>
<tr><td>2.</td><td>From the drop-down menu, click Change Stage.</td><td>
</td></tr>
<tr><td>3.</td><td>Select the proper stage from the New Stage drop-down menu.
Click Save.</td><td>
</td></tr>
<tr><th colspan="3">Financing: View financing application status and send Consumer Agreement</th></tr>
<tr><td>1.</td><td>Click the Financing tab to see a list of your customer's applications and the status.</td><td>
</td></tr>
<tr><td>2.</td><td>For the Approved project, click the blue hyperlink for the project ID.
This opens the Application page.</td><td>
</td></tr>
</table>

3.	Scroll down to see the Application ***Timeline*** on the bottom left side.	
4.	The ***Consumer Agreement*** and ***Utility Bill*** will need to be submitted for a recently approved project.	
5.	Click ***Send documents*** to send the Consumer Agreement to the customer.	
6.	Click the ***Cases*** tab to submit missing documents.	

<table>
<tr><td>7.</td><td>Click Upload Document to upload.
In this case, the utility bill is missing.</td><td>
</td></tr>
<tr><td>8.</td><td>Once uploaded, click Send documents.</td><td>
</td></tr>
<tr><td>9.</td><td>Click Send Documents again in the pop-up.</td><td>
</td></tr>
<tr><td>10.</td><td>GoodLeap will provide an internal review of the uploaded document before approval.</td><td>
</td></tr>
<tr><td colspan="3">Financing: Digital project verification call for proof of identity</td></tr>
<tr><td>1.</td><td>After Agreement is signed, customer + EC receive email w Callpilot survey link.
Note: Device used to open the link must have a camera. If opening on mobile device, download Callpilot app.</td><td>All customers must complete the survey, answering all 15-16 questions (3-5 minutes).
Questions must be answered verbally.</td></tr>
</table>

2.	Once complete, click ***Upload***. **Note:** Wait for the recording to finish uploading before leaving the page. GoodLeap receives resonse and provisions case. If rejected, customer receives a new email link to retry. The project is verified.	
Financing: Create a Change Order		
1.	Click the ***Financing*** tab.	
2.	On the ***Financing*** page, click the blue title for the project ***title***.	
3.	Click ***Clone for Change Order***.	

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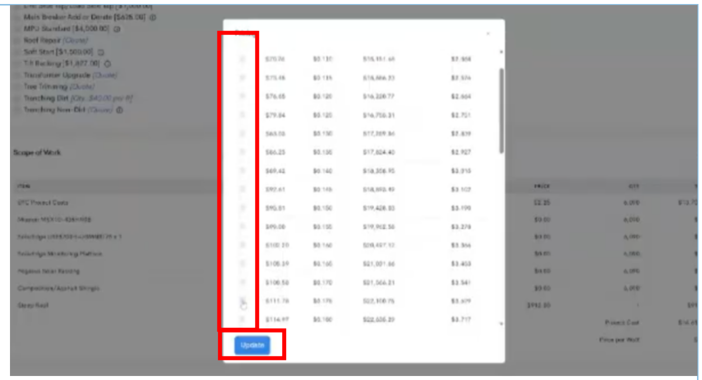
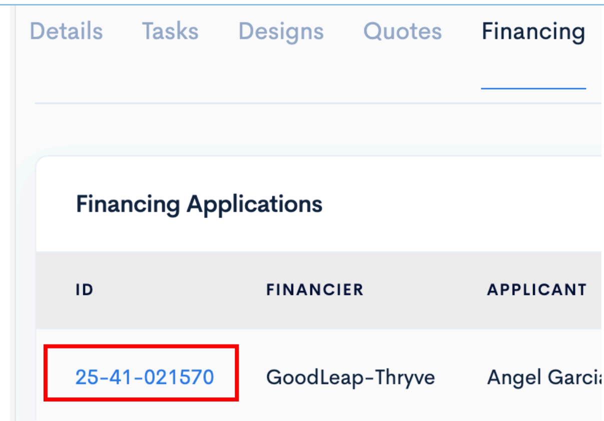
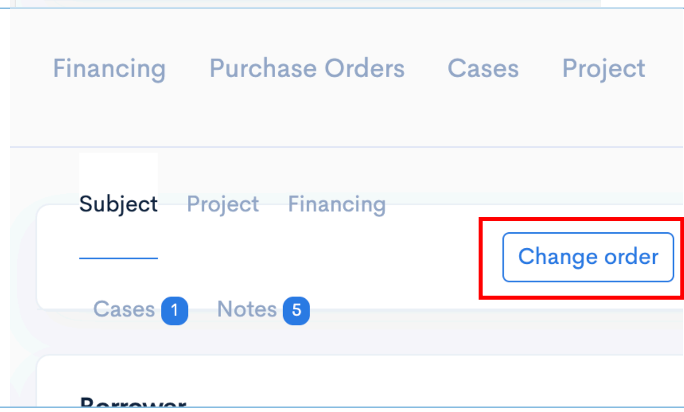
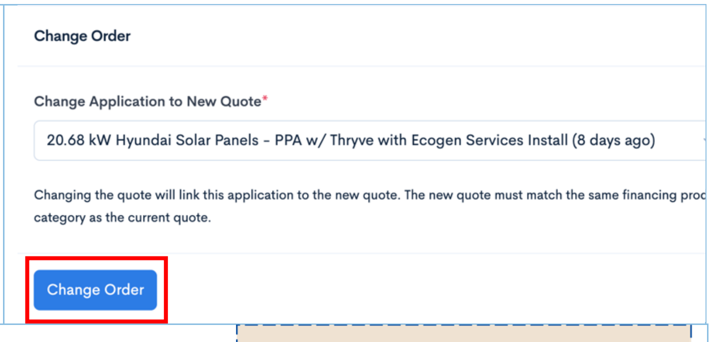
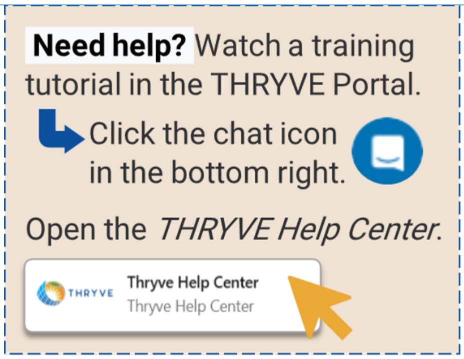
4.	Manual updates are ***necessary*** because ***not all details are automatically matched***. Confirm that production, system size, design, and original customer terms are correctly cloned. ***Economic details (pricing and adders) are reset when you clone so these must be readjusted.*** Click ***SAVE***. EVERYTHING IS NOT AUTOMATICALLY CLONED. The Portals defaults to the lowest price, so verify your correct pricing.	
5.	Once your changes are made and ***saved***, return to the Finance tab and click on the Project ID.	
6.	Click ***Change Order***.	

7.	From the dropdown, select the ***most appropriate*** change order, which in most instances will be the most recent change order in the final dropdown. Click ***Change Order***.	
		

Files: View customer files

1.	Click the ***Files*** tab on the Customer page.	
2.	Attach any files you want to keep with the Customer account by selecting the ***File Category*** from the drop-down menu. Then drag the corresponding file(s) into the box.