



THRYVE

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!

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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!

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**

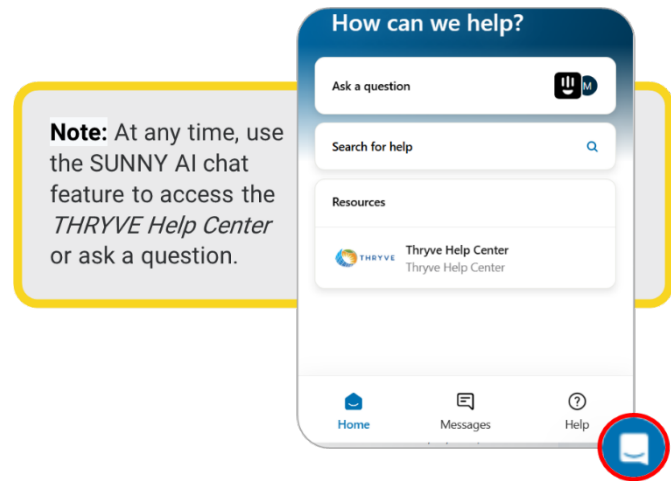
In the Customer > Finances tab you can see the application status.

10. **Send Consumer Agreement**

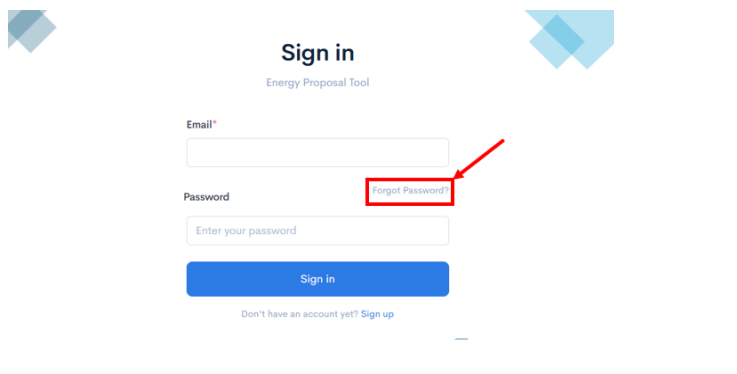
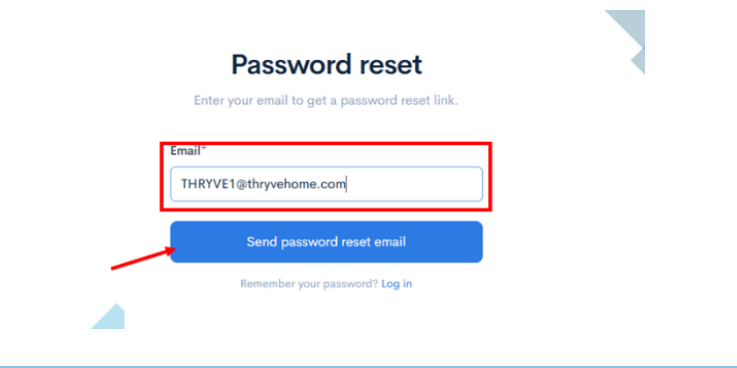

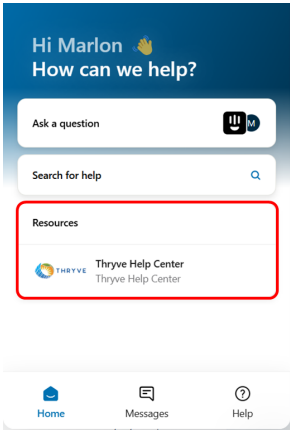
From the Customer > Finances tab, open the Approved application to send the Consumer Agreement and upload the utility bill.

11. **Digital Project verification call (proof of identity)**

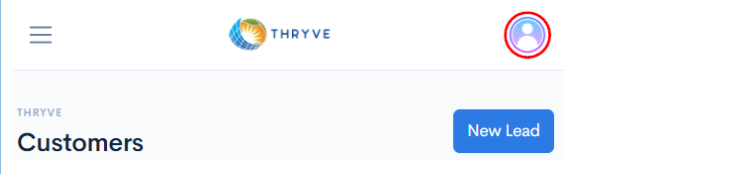
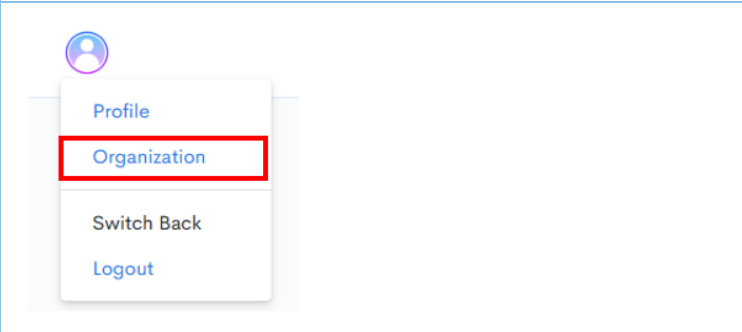
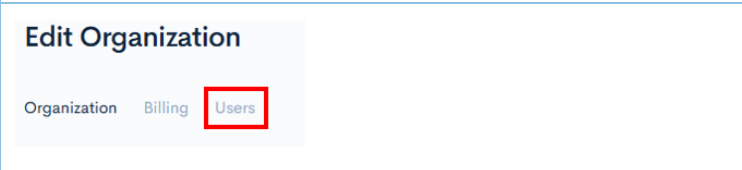
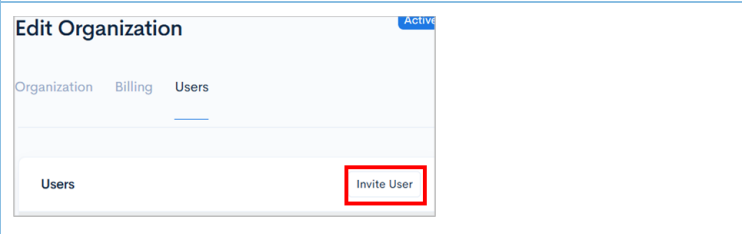
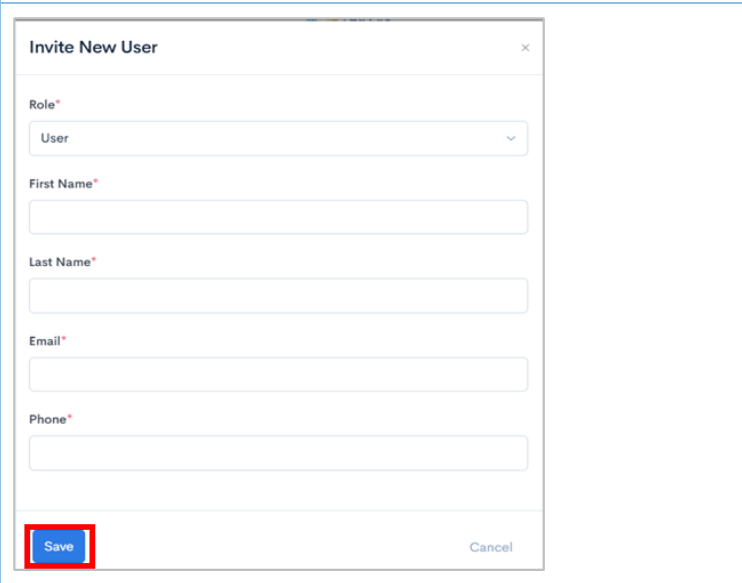
GoodLeap calls the customer to verify their identity.





Admin: First, log in	
1. Go to the THRYVE Portal (https://dealer.thryve.energy/login)	★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: <ul style="list-style-type: none">● Ask a question● Look up how-to guides in the THRYVE Help Center	




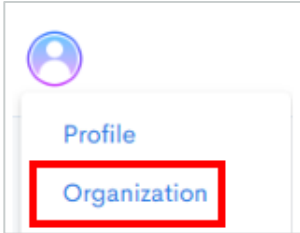
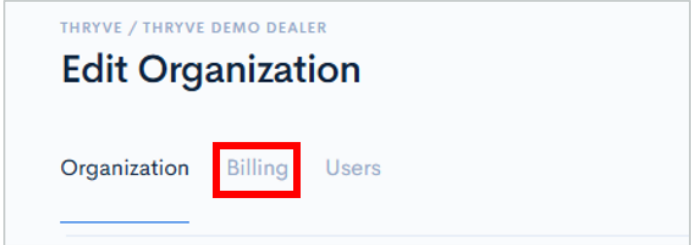
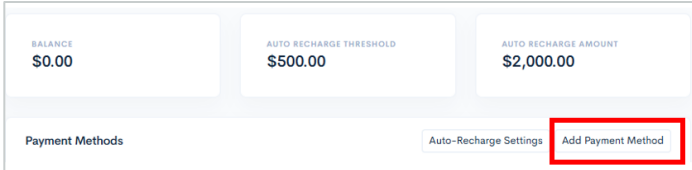
Admin: Set up team users	
1. Open the THRYVE Portal and click the Profile icon.	
2. Select Organization .	
3. Navigate to the Users tab.	
4. Click on Invite User .	
5. Enter the new user's information. Click Save .	



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 .	



5. Add your payment information and click Save.

The screenshot shows a modal window titled "Add a Payment Method" with a close button (X) in the top right corner. At the top, there is a lock icon and the text "Secure, 1-click checkout with Link" followed by a dropdown arrow. Below this are several input fields: "Card number" with the value "1234 1234 1234 1234" and logos for VISA, Mastercard, American Express, and Discover; "Expiration date" with a placeholder "MM / YY"; "Security code" with a placeholder "CVC" and a card icon; "Country" with a dropdown menu showing "United States"; and "ZIP code" with the value "12345". A small disclaimer text reads: "By providing your card information, you allow Optimus Platform Services LLC to charge your card for future payments in accordance with their terms." At the bottom, there is a blue "Save" button and a "Cancel" link.


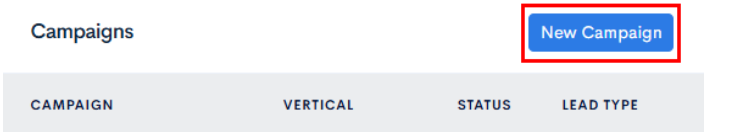
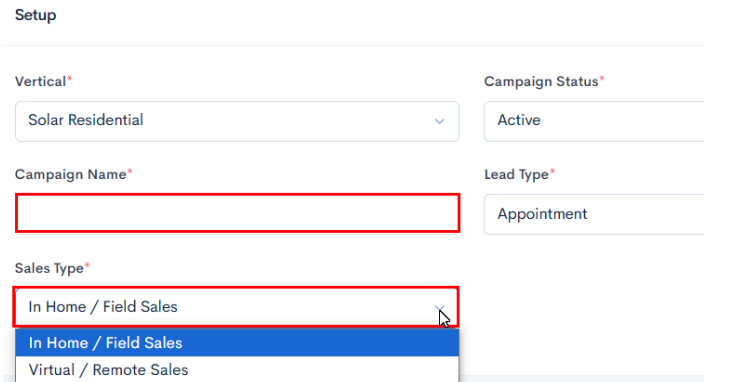
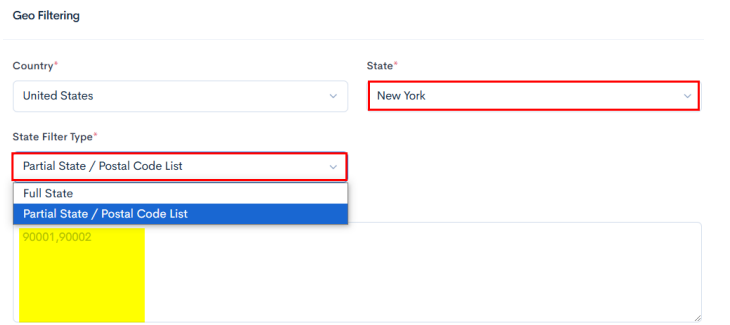
6. Click **Auto-Recharge Settings** to set spending limits and recharge balance.

The screenshot shows a modal window titled "Auto Recharge" with a close button (X) in the top right corner. It features a "Payment Type" dropdown menu with three options: "Automatically recharge my balance" (selected and highlighted in blue), "Automatically recharge my balance", and "I want to pause payments and services will stop when the balance is exhausted". Below the dropdown is a field for a spending limit, currently set to "\$1,000". Another section titled "Bring my balance back up to" has a dropdown menu set to "\$2,000". At the bottom, there is a blue "Save" button and a "Cancel" link.

Admin: Create campaign for Leads Program (pre-set appointments)



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:

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




<p>5. In the Utility Filtering section, select whether you accept All Utilities or Specified Utilities Only (and then select which utilities you work in).</p>	<p>Utility Filtering</p> <p>Utility Filter Type*</p> <p>All Utilities All Utilities Specified Utilities Only</p>																																																
<p>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.</p>	<p>Scheduling</p> <p>Earliest Appointment* Latest Appointment* Time Zone*</p> <p>2 hours from now 7 days from now Eastern Time (US & Canada)</p>																																																
<p>7. Select the days you're available for appointments, then set your start and end times.</p> <p>In the CAP field, enter the maximum number of appointments you can take.</p>	<table border="1"><thead><tr><th>ON?</th><th>DAY OF WEEK</th><th>START TIME</th><th>END TIME</th><th>TIME</th><th>CAP</th></tr></thead><tbody><tr><td><input type="checkbox"/></td><td>Sunday</td><td>12:00 AM</td><td>11:59 PM</td><td>24 hours</td><td>10</td></tr><tr><td><input checked="" type="checkbox"/></td><td>Monday</td><td>08:00 AM</td><td>04:00 PM</td><td>8 hours</td><td>10</td></tr><tr><td><input checked="" type="checkbox"/></td><td>Tuesday</td><td>04:00 PM</td><td>08:00 PM</td><td>4 hours</td><td>5</td></tr><tr><td><input checked="" type="checkbox"/></td><td>Wednesday</td><td>08:00 AM</td><td>08:00 PM</td><td>12 hours</td><td>10</td></tr><tr><td><input checked="" type="checkbox"/></td><td>Thursday</td><td>08:00 AM</td><td>08:00 PM</td><td>12 hours</td><td>10</td></tr><tr><td><input checked="" type="checkbox"/></td><td>Friday</td><td>12:00 PM</td><td>08:00 PM</td><td>8 hours</td><td>4</td></tr><tr><td><input checked="" type="checkbox"/></td><td>Saturday</td><td>09:00 AM</td><td>02:00 PM</td><td>5 hours</td><td>3</td></tr></tbody></table>	ON?	DAY OF WEEK	START TIME	END TIME	TIME	CAP	<input type="checkbox"/>	Sunday	12:00 AM	11:59 PM	24 hours	10	<input checked="" type="checkbox"/>	Monday	08:00 AM	04:00 PM	8 hours	10	<input checked="" type="checkbox"/>	Tuesday	04:00 PM	08:00 PM	4 hours	5	<input checked="" type="checkbox"/>	Wednesday	08:00 AM	08:00 PM	12 hours	10	<input checked="" type="checkbox"/>	Thursday	08:00 AM	08:00 PM	12 hours	10	<input checked="" type="checkbox"/>	Friday	12:00 PM	08:00 PM	8 hours	4	<input checked="" type="checkbox"/>	Saturday	09:00 AM	02:00 PM	5 hours	3
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- 8. Under **Lead Delivery**, enter the email address lead appointments should be sent to.
Click **Add Email** to enter more than one.
Click **Save**.

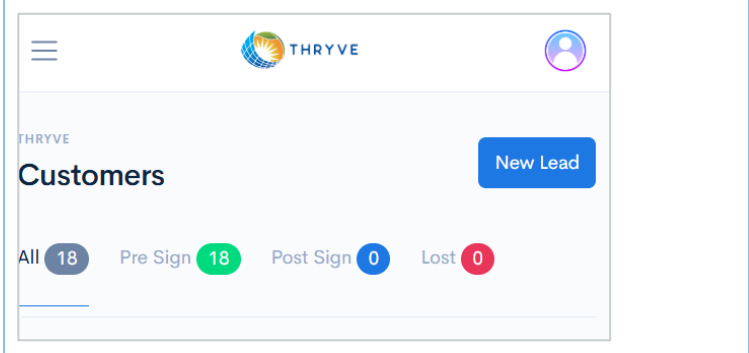
Lead Delivery

sales@ABCsolar.com 

Add Email

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**.

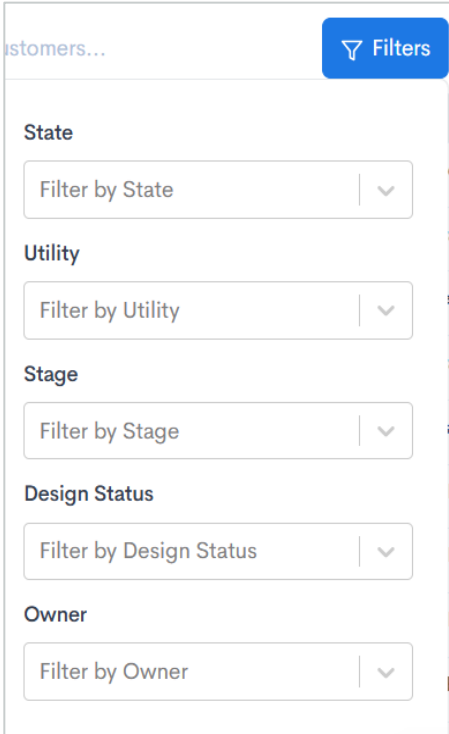
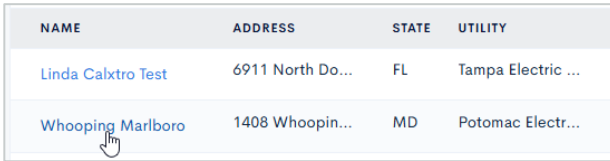
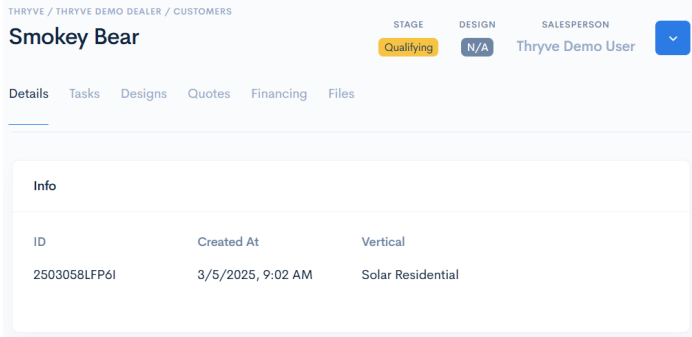


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Customers **New Lead**

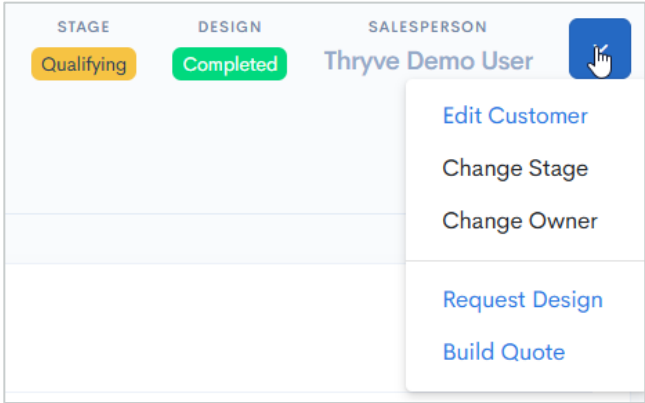
All 18 Pre Sign 18 Post Sign 0 Lost 0




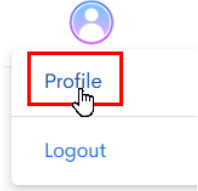
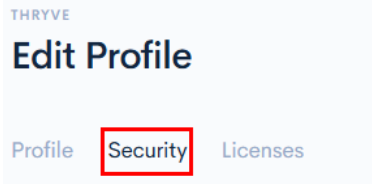
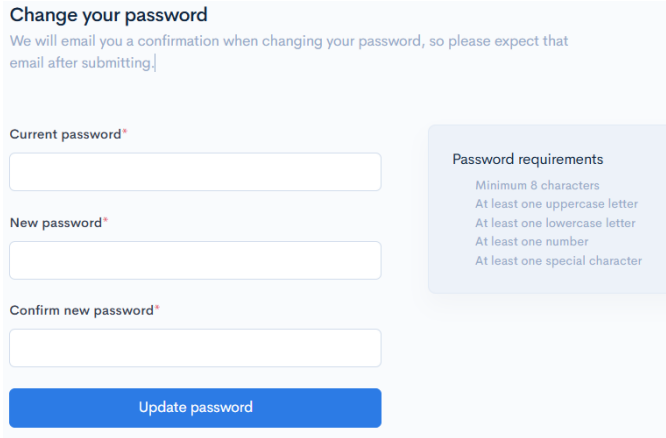
<p>2. Filter your customers further with the <i>Filters</i> tool on the right side.</p>	
<p>3. Click on a customer name to view their account.</p>	
<p>4. The <i>Customer Details</i> page opens. View customer info.</p>	



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<p>5. For quick access to certain actions, click the blue caret on the right.</p> <p>Here you can edit customer info, change the lead stage or owner, request a design, or begin building a quote.</p>	
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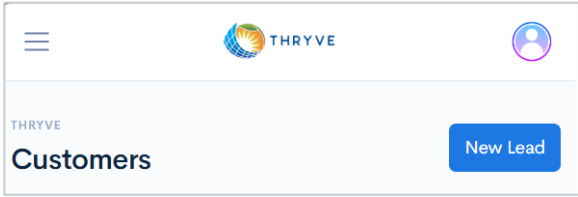
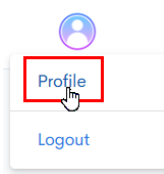
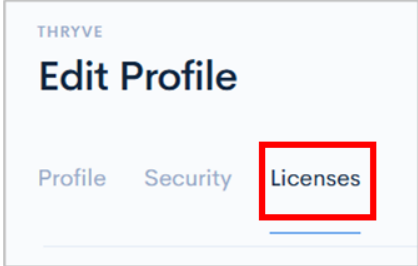
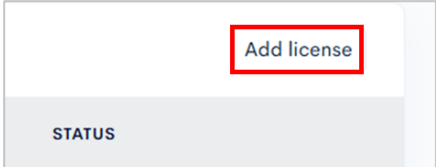
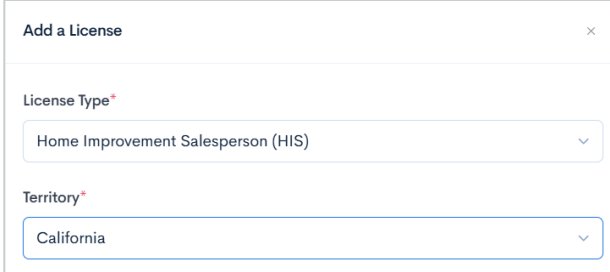
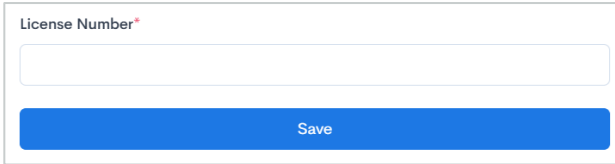
Start: Edit Profile + Security settings

<p>1. Click the Profile icon.</p>	
<p>2. Click <i>Profile</i>.</p>	
<p>3. Click <i>Security</i>.</p>	
<p>4. Edit your password.</p> <p>Click <i>Update password</i>.</p>	

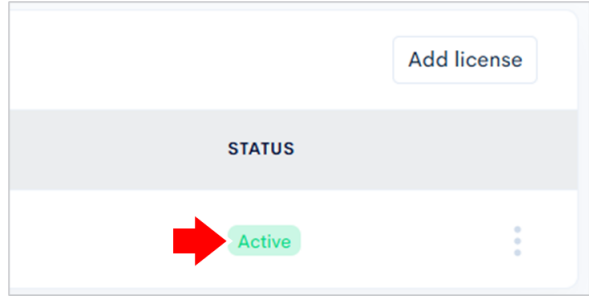
Start: Add Salesperson licenses (as required in certain states)



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




<p>7. The License Status now reads Active.</p>	
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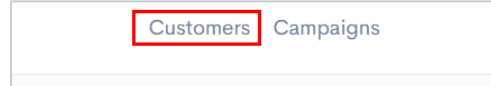
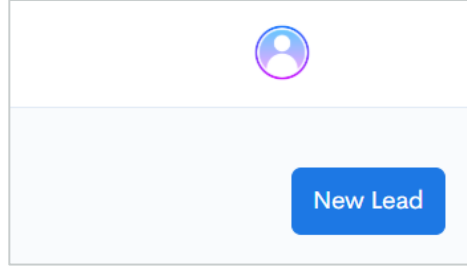

Need help? Watch a training tutorial in the THRYVE Portal.

Click the chat icon in the bottom right.

Open the *THRYVE Help Center*.



Leads: Create a Lead

<p>1. Click Customers from the top navigation.</p>	
<p>2. Click New Lead.</p>	
<p>3. In the Setup section, open the Stage drop-down menu.</p> <p>Select Qualified from the drop-down to auto-request a design.</p>	



<p>4.</p>	<p>Enter the site address, including City, State, and Zip Code.</p>	<p>Site</p> <p>Street*</p> <p>Street Address</p> <p>City*</p> <p>City</p>
<p>5.</p>	<p>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.</p>	<p>Property</p> <p>Primary Install Material*</p> <p>Composition/Asphalt Shingle</p> <p>Structure Type</p> <p>Unknown</p> <p>Property Use</p> <p>Unknown</p> <p>Zoning Type</p> <p>Unknown</p> <p>Ownership</p> <p>Individual(s)</p> <p>Home Owners Association</p> <p>Unknown</p>
<p>6.</p>	<p>For Primary Contact, enter the customer's details, including First Name, Last Name, Phone, and Email.</p>	<p>Primary Contact</p> <p>First name*</p> <p>First name</p> <p>Last Name*</p> <p>Last name</p> <p>Phone</p> <p>Email*</p> <p>Email</p>



<p>7. For Utility Rates, select the Load Serving Entity from the drop-down menu.</p>	<p>Utility Rates</p> <p>Load Serving Entity (LSE)*</p> <p>Aiken Electric Coop Inc</p> <p>Aiken Electric Coop Inc</p> <p>Dominion Energy SC</p> <p>South Carolina Electric&Gas Company</p> <p>Future Tariff*</p> <p>Residential - Single</p>
<p>8. For Current Tariff, choose the customer's current charge rate.</p>	<p>Current Tariff*</p> <p>Residential - Single</p> <p>Residential - Single</p> <p>Residential - Off Peak</p> <p>Residential Time of Use</p> <p>Residential - Good Cents, Improved Home (Closed)</p> <p>Residential - Good Cents, New Home (Closed)</p> <p>Residential Time Of Use - Net Metering(closed)</p> <p>Residential - Single (Advance Pay)</p>
<p>9. For Future Tariff, choose the assumed future rate.</p>	<p>Future Tariff*</p> <p>Residential - Single</p> <p>Residential - Single</p> <p>Residential Time of Use</p> <p>Residential - Single (Advance Pay)</p>
<p>10. In the Current Usage section, select how you want the Usage Input—as an Average Monthly Bill or exact Monthly Energy Usage.</p>	<p>Current Usage</p> <p>Usage Input*</p> <p>Average Monthly Bill (\$)</p> <p>Average Monthly Bill (\$)</p> <p>Monthly Energy Usage (kWh)</p>



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<p>11. If the Monthly Energy Usage is used, complete each month's field for kWh usage.</p>	<div style="border: 1px solid #ccc; padding: 10px;"> <p>Current Usage</p> <hr/> <p>Usage Input*</p> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 10px;">Monthly Energy Usage (kWh) v</div> <table style="width: 100%; text-align: center;"> <tr> <td style="border: 1px solid #ccc; width: 33%;">JAN</td> <td style="border: 1px solid #ccc; width: 33%;">FEB</td> <td style="border: 1px solid #ccc; width: 33%;">MAR</td> </tr> <tr> <td style="border: 1px solid #ccc;"> </td> <td style="border: 1px solid #ccc;"> </td> <td style="border: 1px solid #ccc;"> </td> </tr> <tr> <td style="border: 1px solid #ccc;">APR</td> <td style="border: 1px solid #ccc;">MAY</td> <td style="border: 1px solid #ccc;">JUN</td> </tr> <tr> <td style="border: 1px solid #ccc;"> </td> <td style="border: 1px solid #ccc;"> </td> <td style="border: 1px solid #ccc;"> </td> </tr> <tr> <td style="border: 1px solid #ccc;">JUL</td> <td style="border: 1px solid #ccc;">AUG</td> <td style="border: 1px solid #ccc;">SEP</td> </tr> <tr> <td style="border: 1px solid #ccc;"> </td> <td style="border: 1px solid #ccc;"> </td> <td style="border: 1px solid #ccc;"> </td> </tr> <tr> <td style="border: 1px solid #ccc;">OCT</td> <td style="border: 1px solid #ccc;">NOV</td> <td style="border: 1px solid #ccc;">DEC</td> </tr> <tr> <td style="border: 1px solid #ccc;"> </td> <td style="border: 1px solid #ccc;"> </td> <td style="border: 1px solid #ccc;"> </td> </tr> </table> <p>Total Annual Usage: 0 kWh.</p> </div>	JAN	FEB	MAR				APR	MAY	JUN				JUL	AUG	SEP				OCT	NOV	DEC			
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APR	MAY	JUN																							
JUL	AUG	SEP																							
OCT	NOV	DEC																							
<p>12. If the Average Monthly Bill is used, enter the value.</p>	<div style="border: 1px solid #ccc; padding: 10px;"> <p>Current Usage</p> <hr/> <p>Usage Input* Average Monthly Bill</p> <div style="display: flex; justify-content: space-between;"> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 10px;">Average Monthly Bill (\$) v</div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 10px;">\$ <input style="width: 80px;" type="text"/></div> </div> </div>																								
<p>13. If Additional Future Usage is anticipated, click Add to populate the field.</p> <p>Click Save.</p>	<div style="border: 1px solid #ccc; padding: 10px;"> <p>Additional Future Usage</p> <hr/> <p>Include estimated future usage such as an electric vehicle or heat pump that you plan to purchase.</p> <table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left; border-bottom: 1px solid #ccc;">Note</th> <th style="text-align: right; border-bottom: 1px solid #ccc;">Annual kWh</th> <th style="border-bottom: 1px solid #ccc;"></th> </tr> </thead> <tbody> <tr> <td style="border: 1px solid #ccc; padding: 5px;">New Future Usage</td> <td style="text-align: right; background-color: #ffff00; padding: 5px;">0</td> <td style="text-align: right; padding: 5px;"> + Add 🗑 Remove </td> </tr> <tr> <td style="text-align: right; padding-top: 5px;">Total</td> <td style="text-align: right; padding-top: 5px;">0</td> <td></td> </tr> </tbody> </table> </div>	Note	Annual kWh		New Future Usage	0	+ Add 🗑 Remove	Total	0																
Note	Annual kWh																								
New Future Usage	0	+ Add 🗑 Remove																							
Total	0																								
<div style="border: 2px dashed #ccc; padding: 10px; background-color: #f9f9f9;"> <p>Need help? Watch a training tutorial in the THRYVE Portal.</p> <p> Click the chat icon in the bottom right. </p> <p>Open the <i>THRYVE Help Center</i>.</p> <div style="border: 1px solid #ccc; padding: 5px; display: inline-block; margin-top: 10px;"> Thryve Help Center Thryve Help Center </div> </div>																									



Designs: Request a design

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

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.

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

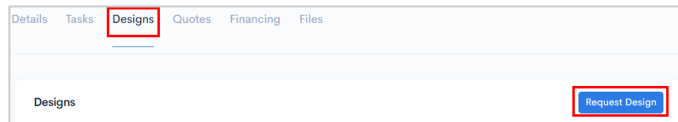
Click the chat icon in the bottom right.



Open the *THRYVE Help Center*.



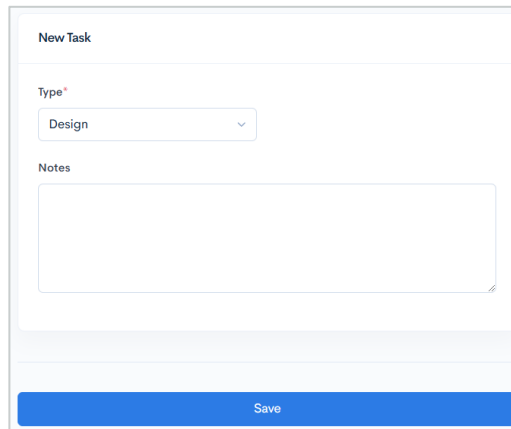
1. Once a lead has been created, click on *Designs* on the navigation bar.



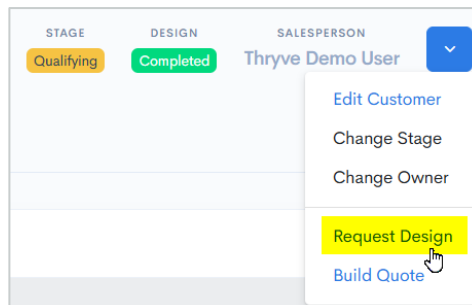
2. Click *Request Design*.

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.

THRYVE / THRYVE DEMO DEALER / CUSTOMERS

Smokey Bear

STAGE: Qualifying DESIGN: N/A SALESPERSON: Thryve Demo User

Details **Tasks** Designs Quotes Financing Files

Tasks New Task

Designs: View the MaxFit design

1. Click on *Designs* in the navigation bar.

Click *View* to open your design.

Details Tasks **Designs** Quotes Financing Files

Designs Request Design

NAME	TYPE	STATUS	CREATED AT	
Option 1 2025 03 05 T16:30:34.000 Z	Solargraf	Completed	3/5/2025	View

2. You can view the MaxFit design and monthly solar access.

Design



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.

1. To start, click **New Lead**. On the **Create a New Lead** section, input the address, then scroll down to **Design Request**.

Country* State* Zip/Postal Code*

United States South Carolina 29841

Override Coordinates

Latitude* Longitude*

33.503614 -81.9808115

Design Request

Manual Design with LiDAR

No Design (Import your own design or request a design later)

2. For Design Request, select **No Design**.

Design Request

Manual Design with LiDAR

No Design (Import your own design or request a design later)

3. Add property info, utility rates, etc., and click **SAVE**.

Additional Future Usage

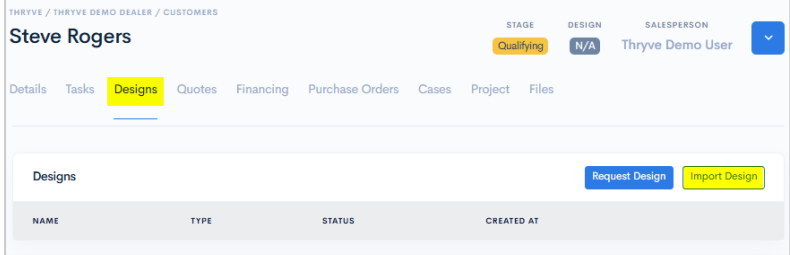
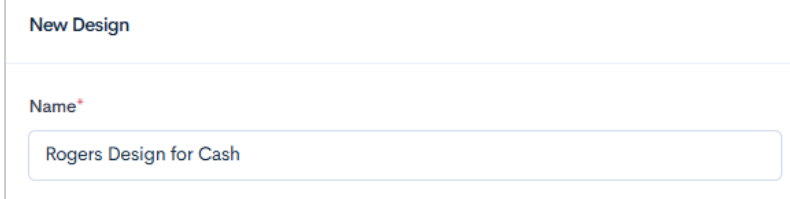
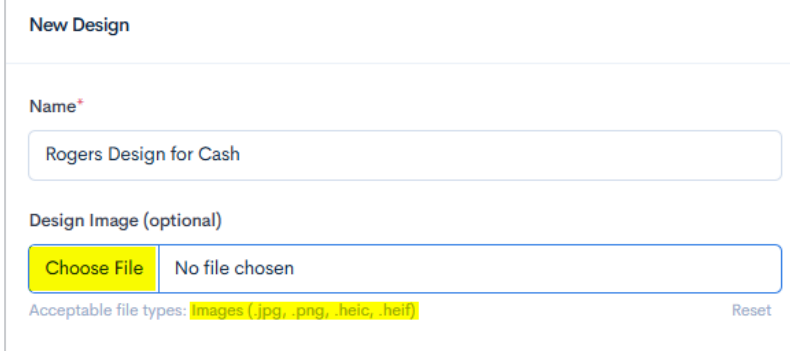
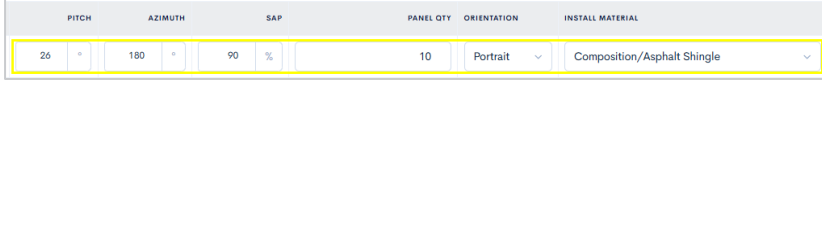
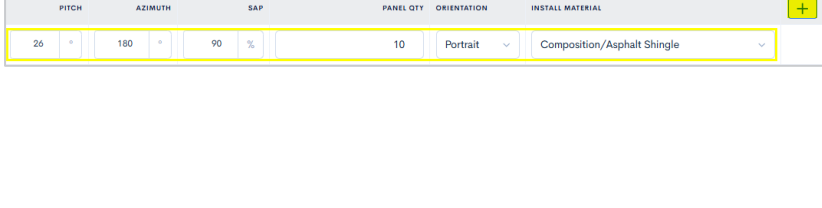
Include estimated future usage such as an electric vehicle or heat pump that you plan to purchase.

Note

	Annual kWh
+ Add	
Total	0

Save



<p>4. Click on the Design tab. Click Import Design.</p>	
<p>5. Name your design.</p>	
<p>6. 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)</p>	
<p>7. Input the design details: Pitch, Azimuth, SAP (Solar Access Percentage), Panel Quantity, Orientation, and Install Material.</p>	
<p>8. To add a roof, click the + on the right. Click SAVE. The Shade Report section will open.</p>	

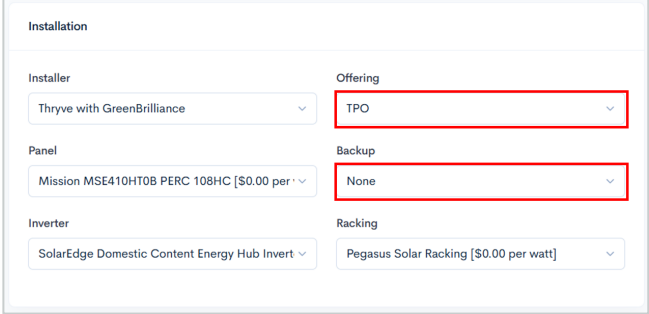
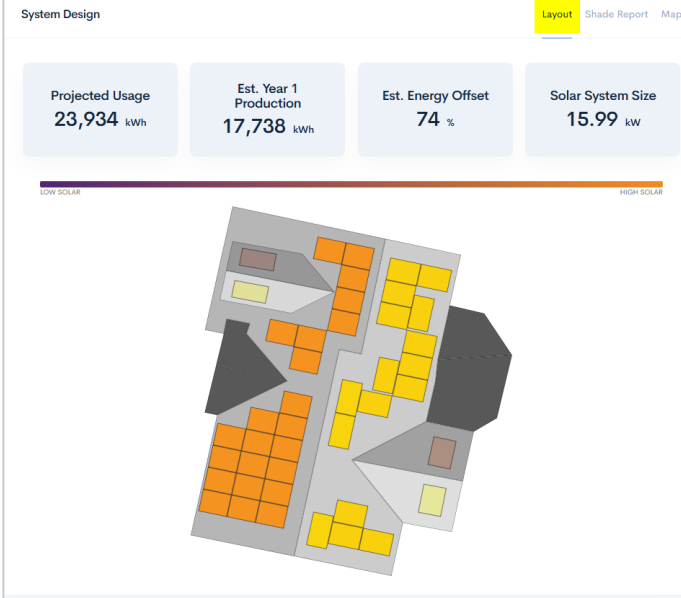


<p>9. Click the Design tab to see your Design listed.</p>	
<p>10. Click the Quotes tab to begin quoting. Input your quote info and click SAVE.</p>	

Quotes: Design a system and build a quote

<p>1. Click on Quotes on the navigation bar. Click New Quotes.</p>	
<p>2. From the Design drop-down list, select the MaxFit design (if you requested more than one).</p>	
<p>3. From the Install Material drop-down list, select the roof type.</p>	



<p>4. In the <i>Installation</i> section:</p> <ul style="list-style-type: none">● Offering: Select the financial option (<i>TPO</i> for Lease/PPA or <i>Cash & Loan</i>).● Backup: Select if your customer is interested in battery backup.● If your dealership has system product options, you can select those.	
<p>5. Scroll down to the <i>System Design</i> section. <i>Layout</i> is the first tab.</p> <p>Design the array layout:</p> <ul style="list-style-type: none">● 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.	



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

System Design Layout **Shade Report** Map

Projected Usage
23,934 kWh

Est. Year 1 Production
17,738 kWh

Est. Energy Offset
74 %

Solar System Size
15.99 kW

Summary

ARRAY	PANEL COUNT	AZIMUTH (DEG.)	PITCH (DEG.)	ANNUAL TOF (%)	ANNUAL SOLAR ACCESS (%)	ANNUAL TSTRF (%)
1	16	102	26	86	99	85
2	23	282	34	74	95	70
Weighted average by panel count					96.6	76.2

Monthly solar access (%) across arrays

ARRAY	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
1	99	99	99	99	99	99	99	99	99	99	99	99
2	94	94	94	95	96	96	96	95	94	95	93	94

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

System Design Layout Shade Report **Map**


Projected Usage
23,934 kWh

Est. Year 1 Production
17,738 kWh

Est. Energy Offset
74 %

Solar System Size
15.99 kW

Map **Satellite**



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

Financing

Lease
PPA

Goodleap

Goodleap 25yr 0.00% \$0 down Lease [0.00% DF] [17,738 kWh / 74% offset]

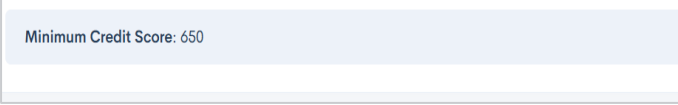
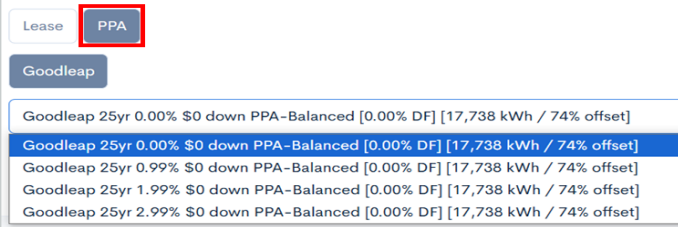
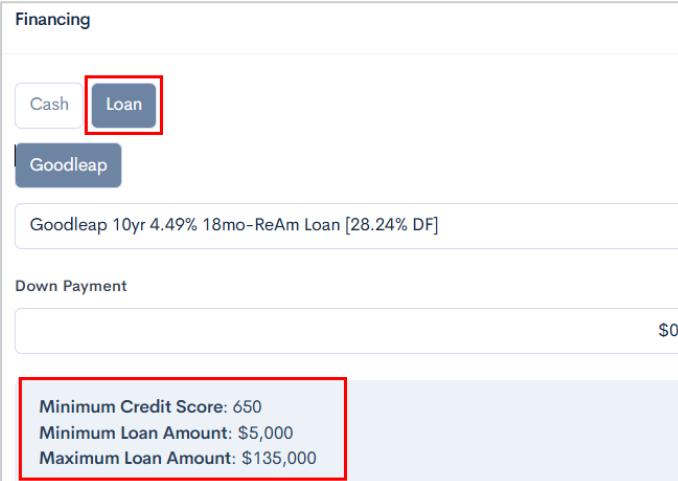
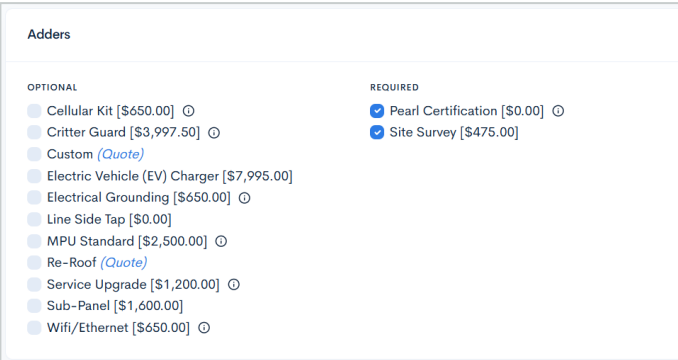
Goodleap 25yr 0.00% \$0 down Lease [0.00% DF] [17,738 kWh / 74% offset]

Goodleap 25yr 0.99% \$0 down Lease [0.00% DF] [17,738 kWh / 74% offset]

Goodleap 25yr 1.99% \$0 down Lease [0.00% DF] [17,738 kWh / 74% offset]

Goodleap 25yr 2.99% \$0 down Lease [0.00% DF] [17,738 kWh / 74% offset]



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



- 10. The *Scope of Work* section shows the costs of work and products.
Click the gear icon to open the *Pricing* window.

ITEM	PRICE	QTY	TOTAL
Project Costs	\$2.42	15,990	\$38,663.39
Mission MSE410HT08 PERC 108HC	\$0.00	15,990	\$0.00
SolarEdge SE11400H x 1	\$0.03	15,990	\$479.70
SolarEdge Monitoring Platform	\$0.00	15,990	\$0.00
Pegasus Solar Racking	\$0.00	15,990	\$0.00
Composition/Asphalt Shingle	\$0.00	15,990	\$0.00
Pearl Certification	\$0.00	1	\$0.00
Site Survey	\$475.00	1	\$475.00
		Project Cost	\$39,618.09
		Price per Watt	\$2.48

- 11. Select the price per watt that your dealership charges (your margin).
Click *Update*.

	MONTHLY	KWH RATE	PROJECT COSTS	PPW
<input checked="" type="radio"/>	\$199.55	\$0.135	\$39,618.09	\$2.478
<input type="radio"/>	\$206.94	\$0.140	\$40,515.07	\$2.534
<input type="radio"/>	\$214.33	\$0.145	\$41,412.05	\$2.590
<input type="radio"/>	\$221.72	\$0.150	\$42,309.03	\$2.646
<input type="radio"/>	\$229.11	\$0.155	\$43,206.01	\$2.702
<input type="radio"/>	\$236.50	\$0.160	\$44,102.99	\$2.758
<input type="radio"/>	\$243.89	\$0.165	\$44,999.97	\$2.814
<input type="radio"/>	\$251.28	\$0.170	\$45,896.95	\$2.870
<input type="radio"/>	\$258.67	\$0.175	\$46,793.93	\$2.926
<input type="radio"/>	\$266.06	\$0.180	\$47,690.91	\$2.983
<input type="radio"/>	\$273.45	\$0.185	\$48,587.89	\$3.039
<input type="radio"/>	\$280.84	\$0.190	\$49,484.87	\$3.095
<input type="radio"/>	\$288.24	\$0.195	\$50,381.85	\$3.151
<input type="radio"/>	\$295.63	\$0.200	\$51,278.83	\$3.207



THRYVE

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.

Terms		Monthly Payments Year 1	
Est Year 1 Solar Rate	\$0.145	Est Monthly Pre-Solar Utility Bill *	\$425.23
Escalator	0.00%	Solar Monthly Payment **	\$214.33
Agreement Term	25 years	Est Monthly Post-Solar Utility Bill	\$116.78

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 / THRYVE DEMO DEALER / CUSTOMERS

Whooping Marlboro

STAGE: Qualifying | DESIGN: Completed | SALESPERSON: Thryve Demo User

Details | Tasks | Designs | Quotes | Financing | Files

Info | Preview | MyThryve | Production Report | Credit Application

ID	Created At	Locked On	Expires On
0356c9d5-d02b-49aa-a92f-a7a03896ee17	3/5/2025, 9:53 AM	3/5/2025	3/19/2025

Installer	Financing	Label	Portal Visibility
GreenBrilliance	Goodleap 25yr 0.00% \$0 down PPA-Balanced	15.99 kW Mission Solar Panels - PPA w/ Thryve with GreenBrilliance Install	Visible

Quotes: Present the Solar Proposal

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

THRYVE / THRYVE DEMO DEALER / CUSTOMERS

Whooping Marlboro

STAGE: Qualifying | DESIGN: Completed | SALESPERSON: Thryve Demo User

Details | Tasks | Designs | Quotes | Financing | Files

Info | **Preview** | MyThryve | Production Report | Credit Application

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

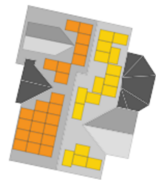
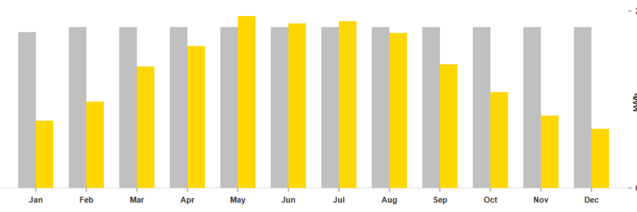
Click the kebab menu (three dots) to the right of your desired quote.

Details | Tasks | Designs | **Quotes** | Financing | Files

Quotes | New Quote

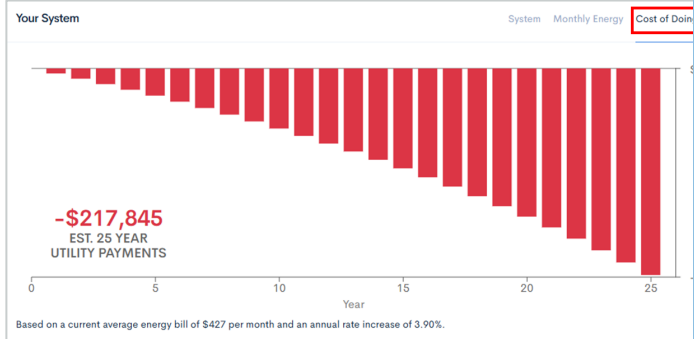
PORTAL	LABEL	SOLAR	FINANCE	STAGE	EXPIRES	CREATED
Visible	15.99 kW Mission Solar Panels - PPA w/ Thryve with GreenBrilliance Install	15.99 kW (39 panels) Mission MSE410HT0B PERC 108HC GreenBrilliance	Goodleap 25yr 0.00% \$0 down PPA-Balanced	Ready	3/19/2025	3/5/2025, 2:02 PM



<p>3. In the drop-down menu, select Preview to open the Solar Proposal or click View to open the Quote Info page.</p>	<div data-bbox="755 304 1003 667"><p>View</p><p>Change Label</p><p>Change Expiration</p><hr/><p>Preview</p><p>MyThryve</p><p>Production Report</p><p>Credit Application</p></div>
<p>4. Note the three tabs on the right—System shows the system.</p>	<div data-bbox="755 693 1429 1102"><p>THRYVE / THRYVE BRAND DEALER</p><p>Your Solar Proposal</p><p>Your System System Monthly Energy Cost of Doing Nothing</p><p>Est. Year 1 Production 17,738 kWh</p><p>Est. Energy Offset 74 %</p><p>Solar System Size 15.99 kW</p></div>
<p>5. Monthly Energy shows the estimated energy consumption and system production over Year 1.</p>	<div data-bbox="755 1144 1429 1606"><p>Your System System Monthly Energy Cost of Doing Nothing</p><p>■ Consumption: Your home energy usage in year 1 in kWh (kilowatt hours)</p><p>■ Production: Estimated solar energy production in year 1 in kWh</p><p>The system design may change based on a detailed engineering site audit. Actual system production, offset and savings will vary based on the final system size, design, configuration, utility rates, applicable rebates, system location, local climate, and your family's energy usage. Monthly consumption may be estimated from an average monthly bill amount.</p></div>



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.

Terms	Value	Monthly Payments Year 1	Value
Est Year 1 Solar Rate	\$0.135	Est Monthly Pre-Solar Utility Bill**	\$425.23
Escalator	0.00%	Solar Monthly Payment***	\$199.55
Agreement Term	25 years	Est Monthly Post-Solar Utility Bill	\$116.70

GoodLeap Payment Terms
goodleap Power Purchase Agreement - Balanced Billing - Solar only
 \$199.55/month for the first year with 0.00% annual escalator
 GoodLeap PPA with a 25-year term.
 Estimated monthly payment includes \$12 ACH Autopay discount.
 As production declines, monthly payments each year adjust accordingly.


Proposals, Disclaimers and Consents
IMPORTANT DETAILS TO UNDERSTAND IN YOUR DECISION FOR SOLAR
 We understand that people go solar to help the environment, and some do it to save money. Many factors impact the savings-related outcomes in this Proposal and whether you will see savings. Here are some of the specific factors for you to consider in your decision.
You Consent On:
 This form information you provide regarding your energy usage, rates and charges, this tool generates the estimates will be. Please provide as much information as you can, and confirm the information in this Proposal is correct.
You Acknowledge:
 Estimates assume your usage will remain the same after you install solar, or increase slightly. If you increase your power usage, the less power you have to sell to your utility, which may impact any potential savings presented to you in this proposal.
Shade and Weather:
 Solar energy production is impacted by weather, daylight hours, shade from vegetation and its future growth, local geography, and current and future nearby constructed structures. Changes in some of these factors are unpredictable and can result in lower potential savings.
 You Consent and Release Utility Rates and Payments

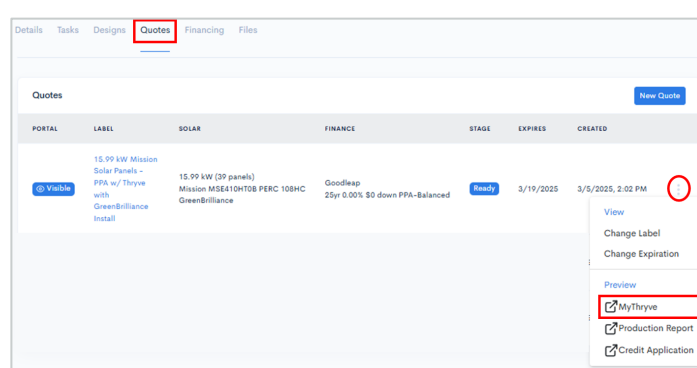
8. To return to the Quote Info, click the browser back button, or click the **Quotes** tab on the navigation bar, then click the kebab menu next to the desired quote and select **View**.

PORTAL	LABEL	SOLAR	FINANCE	STAGE	EXPIRES	CREATED
Visible	15.99 kW Mission Solar Panels + PPA w/ Thryve with GreenBrilliance Install	15.99 kW (39 panels) Mission MSE10HT08 PERC 108HC GreenBrilliance	Goodleap 25yr 0.00% \$0 down PPA-Balanced	Ready	3/19/2025	3/5/2025, 2:02 PM

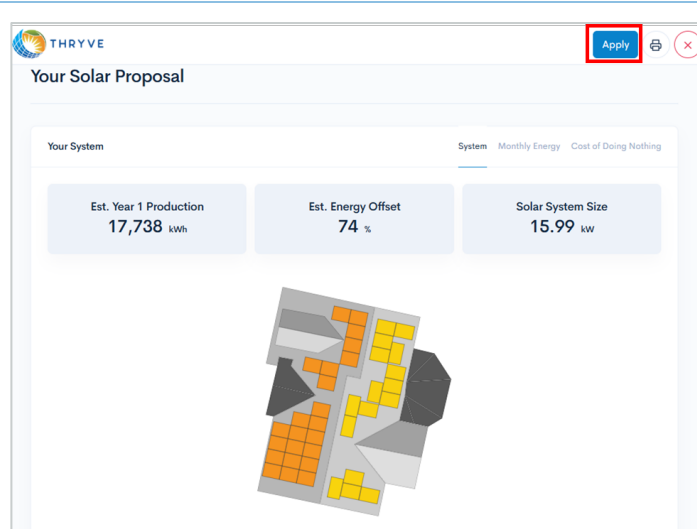


Quotes: Send the Solar Proposal + credit application to the customer

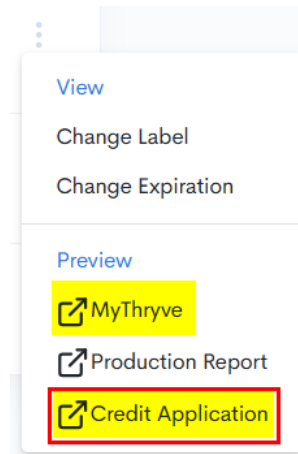
1. On the Customer page, click the **Quotes** tab on the navigation bar, then click the kebab menu (three dots ) next to the desired quote. From the drop-down menu, select **MyThryve**.



2. 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.)



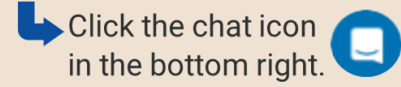
3. **Note:** The **Apply** link does **not** work for the GoodLeap Loan. If your customer is applying for a GoodLeap Loan, copy + paste the **Credit Application** link separately from the **MyThryve** Solar Proposal.
The **Credit Application** link can be used to apply for **any** GoodLeap financing.



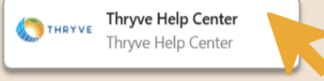


4.

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



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**.

Details Tasks Designs **Quotes** Financing Files

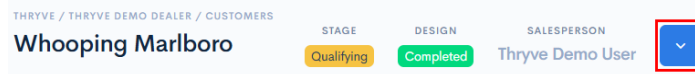
Quotes New Quote

PORTAL	LABEL	SOLAR	FINANCE	STAGE	EXPIRES	CREATED	
	15.99 kW Mission Solar Panels - PPA w/ Thryve with GreenBrilliance Install	15.99 kW (39 panels) Mission MSE41GHT0B PERC 108HC GreenBrilliance	Goodleap 25yr 0.00% \$0 down PPA-Balanced	Ready	3/19/2025	3/5/2025, 2:02 PM	View Change Label Change Expiration
	15.99 kW Lease	15.99 kW (39 panels) Mission MSE41GHT0B PERC 108HC GreenBrilliance	Goodleap 25yr 0.00% \$0 down Lease	Ready	3/19/2025	3/5	Preview
	15.99 kW PPA	15.99 kW (39 panels) Mission MSE41GHT0B PERC 108HC GreenBrilliance	Goodleap 25yr 0.00% \$0 down PPA-Balanced	Ready	3/19/2025	3/5	MyThryve Production Report Credit Applic

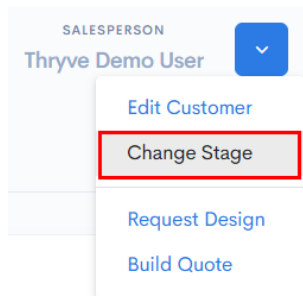


Quotes: Change the account stage

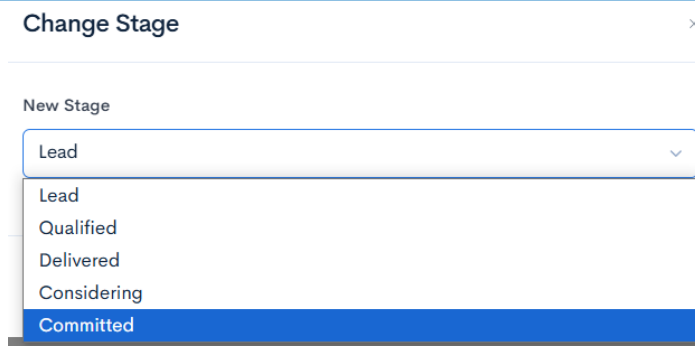
1. Keep your customer stages updated for better overview. On the customer page, click the blue caret.



2. From the drop-down menu, click **Change Stage**.

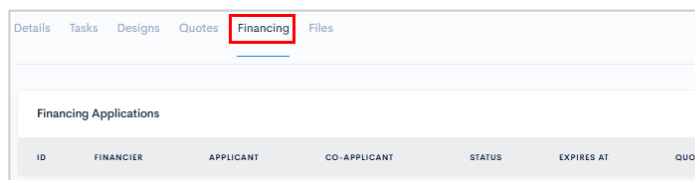


3. Select the proper stage from the **New Stage** drop-down menu. Click **Save**.

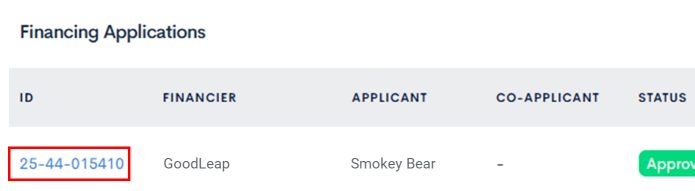


Financing: View financing application status and send Consumer Agreement


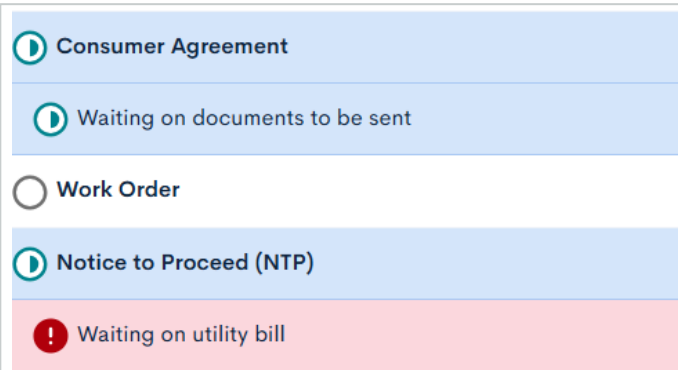
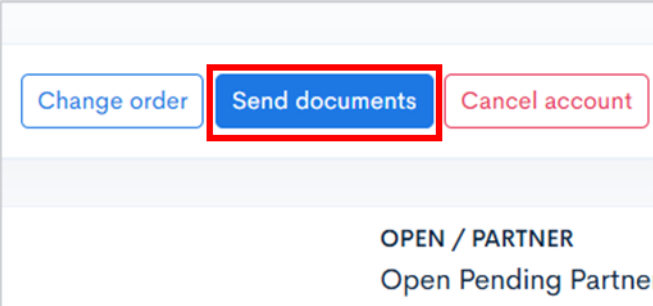
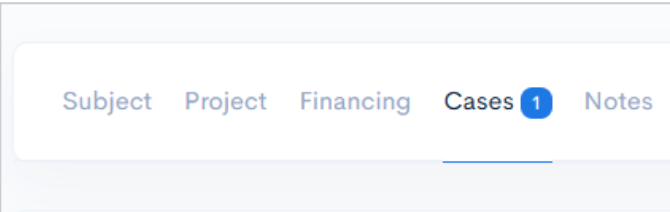
1. Click the **Financing** tab to see a list of your customer's applications and the status.



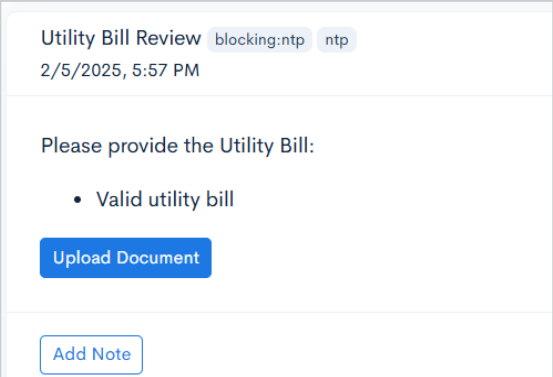
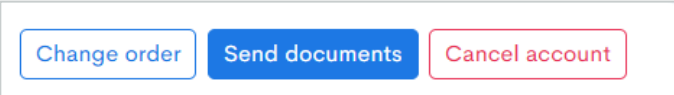
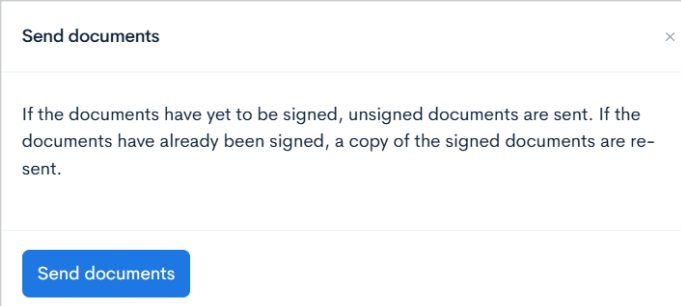
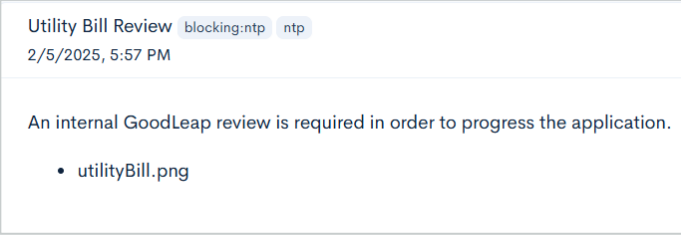
2. For the **Approved** project, click the blue hyperlink for the project **ID**. This opens the Application page.





<p>3. Scroll down to see the Application Timeline on the bottom left side.</p>	 <p>Timeline</p> <ul style="list-style-type: none">Submission 2/5/2025, 5:57 PMApproval 2/5/2025, 5:57 PMProject info 2/5/2025, 6:19 PMConsumer Agreement
<p>4. The Consumer Agreement and Utility Bill will need to be submitted for a recently approved project.</p>	 <ul style="list-style-type: none">Consumer AgreementWaiting on documents to be sentWork OrderNotice to Proceed (NTP)Waiting on utility bill
<p>5. Click Send documents to send the Consumer Agreement to the customer.</p>	 <p>Change order Send documents Cancel account</p> <p>OPEN / PARTNER Open Pending Partner</p>
<p>6. Click the Cases tab to submit missing documents.</p>	 <p>Subject Project Financing Cases 1 Notes</p>



<p>7. Click Upload Document to upload. In this case, the utility bill is missing.</p>	
<p>8. Once uploaded, click Send documents.</p>	
<p>9. Click Send Documents again in the pop-up.</p>	
<p>10. GoodLeap will provide an internal review of the uploaded document before approval.</p>	

Financing: Digital project verification call for proof of identity

<p>1. 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.</p>	<p>All customers must complete the survey, answering all 15-16 questions (3-5 minutes). Questions must be answered verbally.</p>
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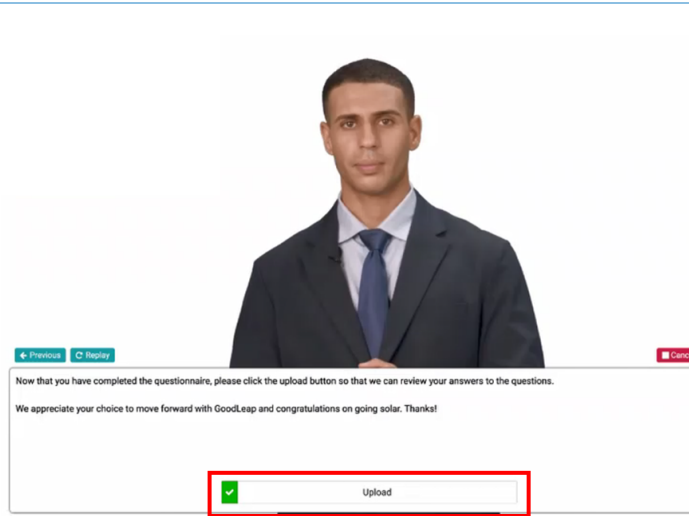
2. Once complete, click **Upload**.

Note: Wait for the recording to finish uploading before leaving the page.

GoodLeap receives response and provisions case.

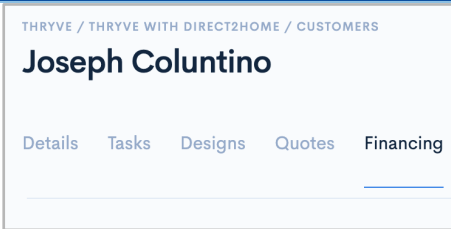
If rejected, customer receives a new email link to retry.

The project is verified.

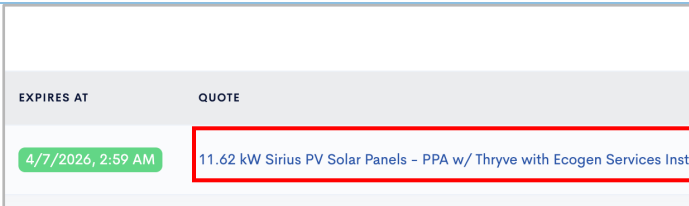


Financing: Create a Change Order

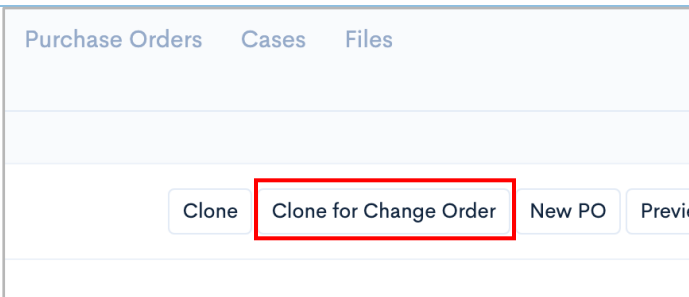
1. Click the **Financing** tab.



2. On the **Financing** page, click the blue title for the project **title**.



3. Click **Clone for Change Order**.





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.

Item	Unit	Price	Quantity	Total
Mini Breaker Add-on Device (5478) (0)		\$75.00	\$0.00	\$75.00
MPV Standard (5479) (0)		\$75.00	\$0.00	\$75.00
Mini Breaker (5480) (0)		\$75.00	\$0.00	\$75.00
7.5 Breaker (5481) (0)		\$75.00	\$0.00	\$75.00
Transformer Upgrade (5482) (0)		\$75.00	\$0.00	\$75.00
New Wiring (5483) (0)		\$75.00	\$0.00	\$75.00
Wiring Box (5484) (0)		\$75.00	\$0.00	\$75.00
Wiring Box (5485) (0)		\$75.00	\$0.00	\$75.00
Scope of Work		\$0.00	\$0.00	\$0.00
Sub		\$0.00	\$0.00	\$0.00
ETC Fixed Cost		\$0.00	\$0.00	\$0.00
Material (5486) (0)		\$0.00	\$0.00	\$0.00
Knowledge (5487) (0)		\$0.00	\$0.00	\$0.00
Knowledge Marketing Platform		\$0.00	\$0.00	\$0.00
Project Web Portal		\$0.00	\$0.00	\$0.00
Comprehensive Account Setup		\$0.00	\$0.00	\$0.00
Setup Fee		\$0.00	\$0.00	\$0.00

5. Once your changes are made and *saved*, return to the Finance tab and click on the Project ID.

ID	FINANCIER	APPLICANT
25-41-021570	GoodLeap-Thryve	Angel Garcia

6. Click **Change Order**.

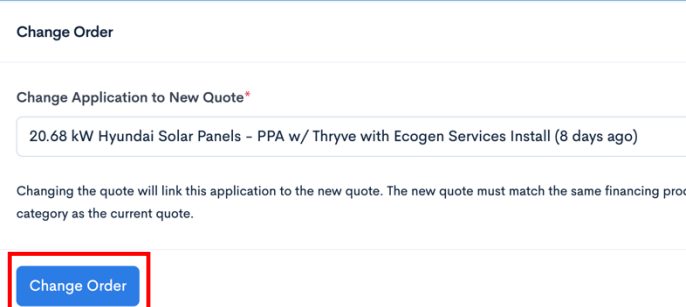
Financing Purchase Orders Cases Project

Subject Project Financing

Cases 1 Notes 5

Change order

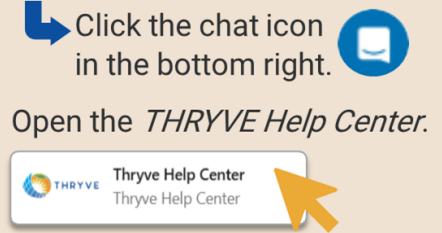


<p>7. From the dropdown, select the most appropriate change order, which in most instances will be the most recent change order in the final dropdown. Click Change Order.</p>	 <p>Change Order</p> <p>Change Application to New Quote*</p> <p>20.68 kW Hyundai Solar Panels - PPA w/ Thryve with Ecogen Services Install (8 days ago)</p> <p>Changing the quote will link this application to the new quote. The new quote must match the same financing product category as the current quote.</p> <p>Change Order</p>
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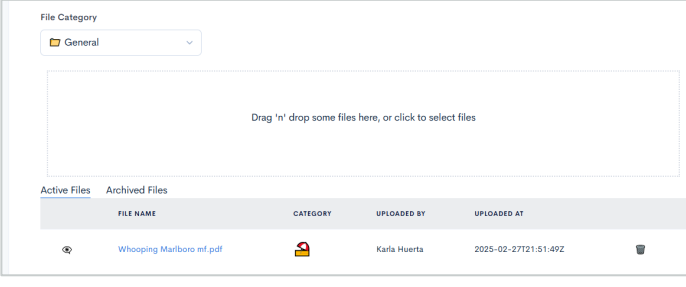
Need help? Watch a training tutorial in the THRYVE Portal.

Click the chat icon in the bottom right.

Open the *THRYVE Help Center*.



Files: View customer files

<p>1. Click the Files tab on the Customer page.</p>	 <p>THRYVE / THRYVE DEMO DEALER / CUSTOMERS</p> <p>Whooping Marlboro</p> <p>STAGE: Qualifying DESIGN: Completed SALESPERSON: Thryve Demo User</p> <p>Details Tasks Designs Quotes Financing Files</p>								
<p>2. Attach any files you want to keep with the Customer account by selecting the File Category from the drop-down menu.</p> <p>Then drag the corresponding file(s) into the box.</p>	 <p>File Category</p> <p>General</p> <p>Drag 'n' drop some files here, or click to select files</p> <table border="1"><thead><tr><th>FILE NAME</th><th>CATEGORY</th><th>UPLOADED BY</th><th>UPLOADED AT</th></tr></thead><tbody><tr><td>Whooping Marlboro mf.pdf</td><td></td><td>Karla Huerta</td><td>2025-02-27T21:51:49Z</td></tr></tbody></table>	FILE NAME	CATEGORY	UPLOADED BY	UPLOADED AT	Whooping Marlboro mf.pdf		Karla Huerta	2025-02-27T21:51:49Z
FILE NAME	CATEGORY	UPLOADED BY	UPLOADED AT						
Whooping Marlboro mf.pdf		Karla Huerta	2025-02-27T21:51:49Z						