Sales Standard Operating Procedure

Step-by-step process for taking a client from first contact to a completed sale.

STATUS PATH: Under Review → Approved for Sale → Sale Complete

1 Set Up the Customer — JUNO

- [ ] **Find the customer** and enter them into Juno.
- [ ] Input the customer's **name, address, and phone number**, then **save**.

2 Meet With the Client — APPOINTMENT

- [ ] **Complete the questionnaire** with the client.
- [ ] **Go through the presentation.**
- [ ] **Send the sworn statement** for the client to complete.
- [ ] Have the client **sign the SEG Agreement**. OPTIONAL

3 Submit for Review — JUNO

- [ ] **Upload the financing and solar documents** to Juno.
- [ ] Change the customer status to Under Review.
- [ ] **Apply for funding.** OPTIONAL

4 Account Manager Review — WAIT FOR APPROVAL

> From here, an **account manager will review your client** and let you know if they are approved to proceed. Once approved, the status will change to Approved for Sale and **you will be notified** that the client is ready to close.

5 Close the Sale — REP PORTAL

- [ ] If they haven't already, have the client **sign the SEG Agreement**.
- [ ] **Send the client an invoice** from the rep portal.
- [ ] **Submit your sale** in the rep portal.
- [ ] **Mark the sale complete.**

Complete Deal Checklist

REQUIRED BEFORE MARKING SALE COMPLETE

- [ ] **Questionnaire** filled out completely
- [ ] **Sworn Statement** completed
- [ ] **SEG Agreement** signed
- [ ] **Solar documents** uploaded to Juno or emailed to info@solarexitgrp.com
- [ ] **Financing completed** or **payment collected**
- [ ] **Sale submitted** in the rep portal