



(Updated: 6/9/12, MCB)

Syncing Your Customers with OnGrid Sky

This brief guide is focused on syncing customer data with OnGrid Sky from within the OnGrid Tool. To learn more about OnGrid Sky generally, or for guidance on navigating the OnGrid Sky website, please see the [OnGrid Sky Guide](#).

This guide is oriented towards users transitioning from OnGrid Tool version 4, but is largely applicable to those using the OnGrid Tool for the first time.

What is OnGrid Sky?

OnGrid Sky (i.e. Sky) is the online companion to the Excel-based OnGrid Tool (i.e. Tool). Amongst other things, Sky facilitates quick sharing of customer data between different computers and users at your company.

If your company has one or more currently-valid licensed users of the OnGrid Tool, your company has a private company account in OnGrid Sky.

Your company account consists of user accounts for each licensed OnGrid Tool user at your company.¹ Although user accounts exist for expired users at your company as well as currently-valid users, only currently-valid users are able to access OnGrid Sky.

Why Sync Customer Data with OnGrid Sky?

There are several reasons you might want to periodically sync your OnGrid Tool customer data with OnGrid Sky.

- **Quick Data Access** - Quickly access your latest customer data revisions on any internet-connected computer (either through the OnGrid Tool, or through a web browser)
- **Data Consolidation** - Keep your customer data organized and consolidated
- **Data Sharing** - Easily share customer data with specific colleagues or all colleagues at your company
- **Backup Security** - Keep a secure backup of your customer data, with quick and easy restore in case of local data loss

¹ "Licensed users" are those who have signed and faxed in the signature page of the OnGrid Tool license agreement found here: <http://www.ongrid.net/index.php?page=signup>.

- **Staff's Project Overview** - Monitor the activity and customer data of salespeople under your supervision (if applicable)
- **Lead Management** - Track important lead details like status and probability in a streamlined browser-based interface
- **Smart Customer Viewing** – See all your customer scenarios clearly in the Sky interface
- **Customer Site Mapping** - See your customer locations as thumbnails on a Google map, with easy zooming and other mapping tools
- **Much more to come!**

Who Can Sync Customer Data?

Any currently-valid licensed user of the OnGrid Tool can sync customer data with OnGrid Sky.

Salespeople and Non-Selling Admin Users

If you haven't faxed in the license agreement yet but would like to use the OnGrid Tool and OnGrid Sky, please sign up now. If you're using the Tool and Sky in support of salespeople at your company and aren't personally selling solar (i.e. your name doesn't need to appear on proposals), you can sign up as a FREE non-selling administrative user. If this applies to you, please select the "Free Administrative" option on the OnGrid Tool sign-up form. <http://www.ongrid.net/index.php?page=signup>

Your First Customer Data Sync

Once you've completed the basic setup process outlined below, syncing customer data with OnGrid Sky will be as simple as clicking an OnGrid Tool link and entering your OnGrid Sky credentials.

Sync Setup Steps (see sections below for details)



Load Your User Key

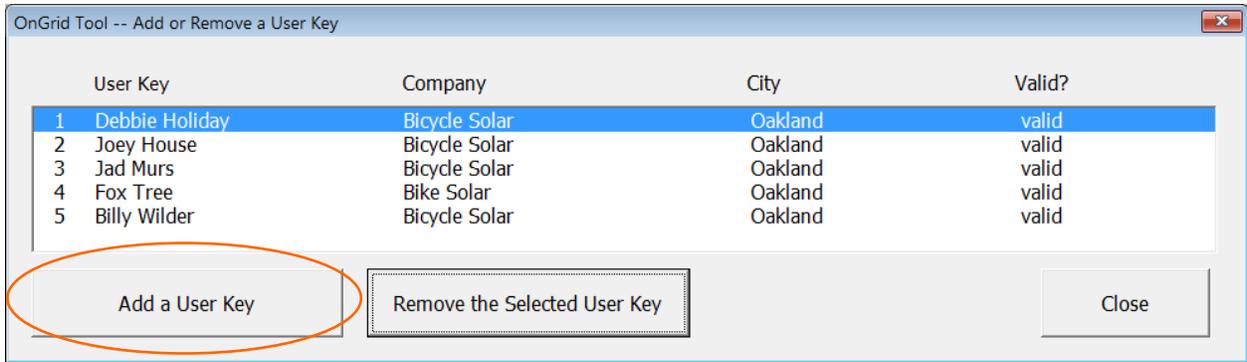
Shortly after signing up for the OnGrid Tool, you should have received an email from OnGrid containing an installer-key file. The installer-key file in turn contains your personal user key, which will allow you to access the OnGrid Tool. Please download this installer-key file to an easily-accessed place on your computer, such as your desktop.

 You might currently be accessing the OnGrid Tool with the user key of another member of your team. For various reasons, we strongly recommend that you use your own user key to access OnGrid Tool version 5. If you're a manager at your company, consider requesting that your salespeople remove all additional user keys from the OnGrid Tool copies loaded onto their computers.

If prompted for a user key when opening the OnGrid Tool, please select the installer-key file sent to you by OnGrid.

If you opened the OnGrid Tool using another user's pre-loaded user key, please go to the OnGrid Tool's 'Settings & Support' sheet to add your own user key. Click 'Add or Remove User Key' in 'Settings & Support' sheet row 76. Then, in the form that appears, click 'Add a User Key' and select your installer-key file.

24	Loaded User Keys
25	User Name
26	1 Debbie Holiday
27	2 Joey House
28	3 Jad Murs
29	4 Fox Tree
30	5 Billy Wilder
31	6
76	Add or Remove User Key



User Key	Company	City	Valid?	
1	Debbie Holiday	Bicycle Solar	Oakland	valid
2	Joey House	Bicycle Solar	Oakland	valid
3	Jad Murs	Bicycle Solar	Oakland	valid
4	Fox Tree	Bike Solar	Oakland	valid
5	Billy Wilder	Bicycle Solar	Oakland	valid

Now that your user key has been loaded into the OnGrid Tool, make it active by selecting it from the 'Active User' drop-down list on Inputs sheet row 10.

9	OnGrid Tool Beta v5.17, © 2012 OnGrid Solar - All Rights Reserved
10	Billy Wilder Active User
11	Bicycle Solar Active User Company

Confirm your OnGrid Sky Account

If you haven't confirmed your OnGrid Sky account yet, a highlighted 'Confirm My Sky Account' link will appear in row 19 of the OnGrid Tool's Inputs sheet. Click the link to

17	New Feature!
18	Learn About OnGrid Sky
19	Confirm My Sky Account

confirm your OnGrid Sky account. On the Sky confirmation webpage, enter your preferred login name (or use the default) and a private/personal password. Then click ‘Activate Account’.

Choose a login name: (4 - 100 characters, not case sensitive)

Choose a password: (6 - 20 characters, case sensitive)

Password confirmation:

OnGrid Sky Confirmation Webpage

When syncing your customer data in the OnGrid Tool, you’ll be prompted for your Sky login name and password – the OnGrid Tool is expecting the credentials you chose on this Sky confirmation webpage.

Assign Version-4 Customers to Salespeople

Upon updating to version 5, no customers in your local customer database will have been assigned to salespeople yet. All customers will need to be assigned before you can sync customer data with OnGrid Sky. You can assign all customers to salespeople quickly using the new ‘Customer Transfer Form’. To access this form, click ‘Assign Customers to Salespeople’ in Inputs sheet row 18. Then click ‘Yes’ when asked to refresh the active user’s status (this prompt will be explained in the ‘Sync Confirmation Prompts’ section below).

17	New Feature!	Sync Customer Data with OnGrid Sky
18	Learn About OnGrid Sky	Assign Customers to Salespeople Please assign all customers to salespeople
19		Go to OnGrid Sky

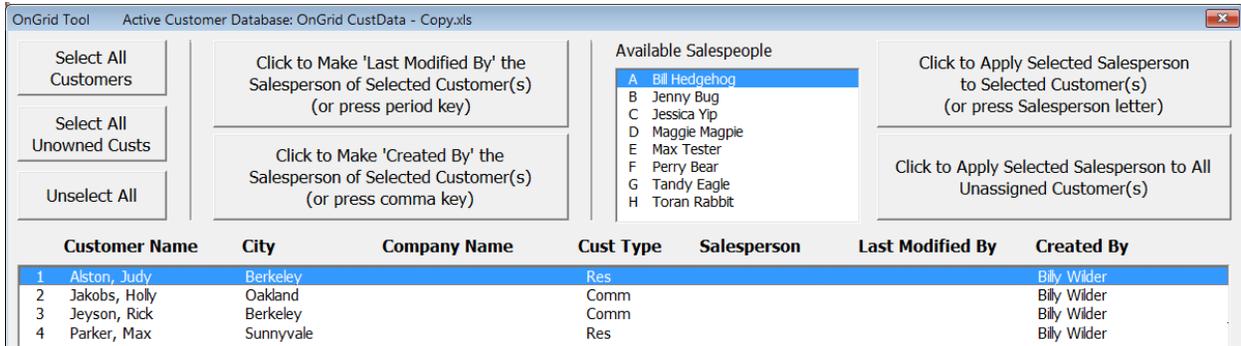
The Customer Transfer Form shows all customers in your active customer database, along with an indication of who at your company originally saved and last modified each customer (based on the active user key loaded at those times).

Using buttons at the top of the form, you can assign selected customer(s) or all customers to...

- ...the user who originally saved the customer (if a selling user)
- ...the user who last modified the customer (if a selling user)
- ...any other selling user at your company, selectable in a list at the top of the form

If all customers in the active customer database belong to you, you can quickly assign them all to yourself in two steps:

- Step 1) Select your name in the salesperson list at the top of the form
- Step 2) Click ‘Click to Apply Selected Salesperson to All Unassigned Customer(s)’

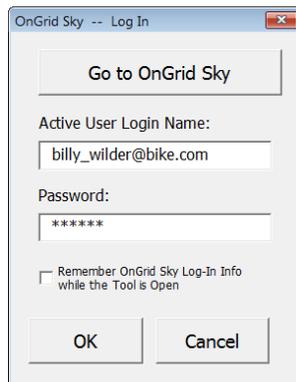


Once all customers have been assigned to salespeople, click the ‘Close – Assign New Salespeople’ button in the lower-right corner of the form to save the changes and close the form.

Complete Customer Sync

You’re now ready to send your customer data to OnGrid Sky. To do this, click ‘Sync Customer Data with OnGrid Sky’ in Inputs sheet row 17. Then click ‘Yes’ when asked whether to continue the customer sync (this prompt will be explained in the ‘Sync Confirmation Prompts’ section below).

Shortly after clicking the link, you’ll be prompted for your OnGrid Sky credentials. Enter the credentials you chose when confirming your OnGrid Sky account.



Since this is your first time syncing customer data, you’ll be asked to accept the OnGrid Sky ‘Terms of Service’. The Terms of Service can be accessed anytime through this webpage: http://www.ongrid.net/index.php?page=tool_legal.

If you’re syncing a large set of customers for the first time, the process will take longer than subsequent syncs. This is because all customers are sent to OnGrid Sky the first time, whereas only modified customer data is transferred in follow-up syncs.

The sync time will vary across computers, Excel versions, and internet connections, but the initial sync shouldn’t take more than 15 minutes. Follow-up syncs shouldn’t take more than a few minutes.

Congratulations! – you’re now utilizing a powerful new OnGrid feature.

Customers Bicycle Solar Staff

Bicycle Solar Customers

Map It!

Filters: - Any Sales Rep - - Any Type - - Any City - County

Showing All 5 Customers

Lead Status - Probability -

First Name, Last Name, or Company: Search

Expand All Collapse All Check All Uncheck All Transfer Checked Customers to: Jad Murs Transfer Customers

Name	City	Company	Type	Lead Status	Sales Rep	Modified	History
Cooper, Bill	+2 Denver		Residential	Proposal Follow Up / 83%	Billy Wilder	May 13, 2012, 1:44 PM	User History
Eubanks, Floyd	+1 Denver		Residential	Site Surveyed / 85%	Joey House	May 13, 2012, 1:40 PM	User History
Henderson, Todd	+1 Denver		Residential	New Lead / 90%	Fox Tree	May 13, 2012, 1:37 PM	User History
Hoover, Jenny	+1 Denver		Residential	/ 95%	Fox Tree	May 13, 2012, 1:42 PM	User History
Marino, Janet	+2 Denver		Residential	New Lead / 90%	Fox Tree	May 13, 2012, 1:39 PM	User History

OnGrid Sky Customer-List Webpage

Other Feature Highlights & Prompts

The Customer Sync & Conflict Resolution

OnGrid Sky has full conflict resolution. In other words, Sky ensures that customer data won't be overwritten if more than one user at your company modifies the same customer between OnGrid Sky syncs. When there's a conflict, Sky will automatically create a second scenario for the conflicting customer scenario version. To differentiate, refer to the different dates and last-modifying users of each scenario version.

OnGrid Sky Customer-List Webpage

Name	City	Company	Type	Lead Status	Sales Rep	Modified	History																		
Cooper, Bill	-2 Denver		Residential	Proposal Follow Up / 83%	Billy Wilder	May 13, 2012, 1:44 PM	User History																		
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Assign New Customers to Salespeople

New to OnGrid Tool version 5, each customer can be assigned to a specific salesperson at your company.

To assign yourself or another salesperson at your company to a new customer, select the salesperson in Inputs sheet row 15 before saving the new customer to your local customer database. The salespeople available for assignment depends on your permission status at your company, which can be set by eligible users in OnGrid Sky. For more on this, see the [OnGrid Sky Guide](#).

9	OnGrid Tool Beta v5.17, © 2012 OnGrid Solar - All Rights Reserved	
10	Jad Murs	Active User
11	Bicycle Solar	Active User Company
12		
13		
14	May 14, 2012	Date of Analysis
15	Billy Wilder	Salesperson
16	Bicycle Solar	Salesperson Company
17	Oakland	Salesperson City

Note in the image above that the active user isn't necessarily the salesperson assigned to the loaded customer. The active user can enter and modify customer data on behalf of other salespeople.

Sync Confirmation Prompts

If syncing data with OnGrid Sky takes an exceptionally long time on your computer due to a slow internet connection or some other reason, it could be frustrating to accidentally click a related link and get stuck in a painfully-slow sync process. That's why by default, the OnGrid Tool asks you to confirm before it starts any user-initiated Sky sync/refresh.

Under normal circumstances though, Sky syncs will happen fast. If this is the case for you, you can allow all user-initiated syncs without confirmation. To do this, select 'No' for 'Confirm User-Initiated Syncs?' in 'Settings & Support' sheet row 18.

10	OnGrid Sky	
11		
12	What is OnGrid Sky?	
13	Go to OnGrid Sky	
14		Ask to Sync Customer Data with
15	No	...the OnGrid Tool is Started?
16	Yes	...the OnGrid Tool is Closed?
17		
18	No	Confirm User-Initiated Syncs?
19		
20	Sync Customer Data with OnGrid Sky	