

SunProjeX

New User Guide

Design and proposal software for solar thermal contractors

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1. Welcome to SunProjeX

PV got every tool. Thermal got a spreadsheet. SunProjeX is the design and proposal software the trade has been waiting for.

If you install solar pool heating, solar domestic hot water systems, or both, this is where your jobs live. Trace a roof, lay out panels with the irradiance heatmap, get a customer ready proposal in under an hour, and track every deal from quote to install. The whole workflow on one canvas.

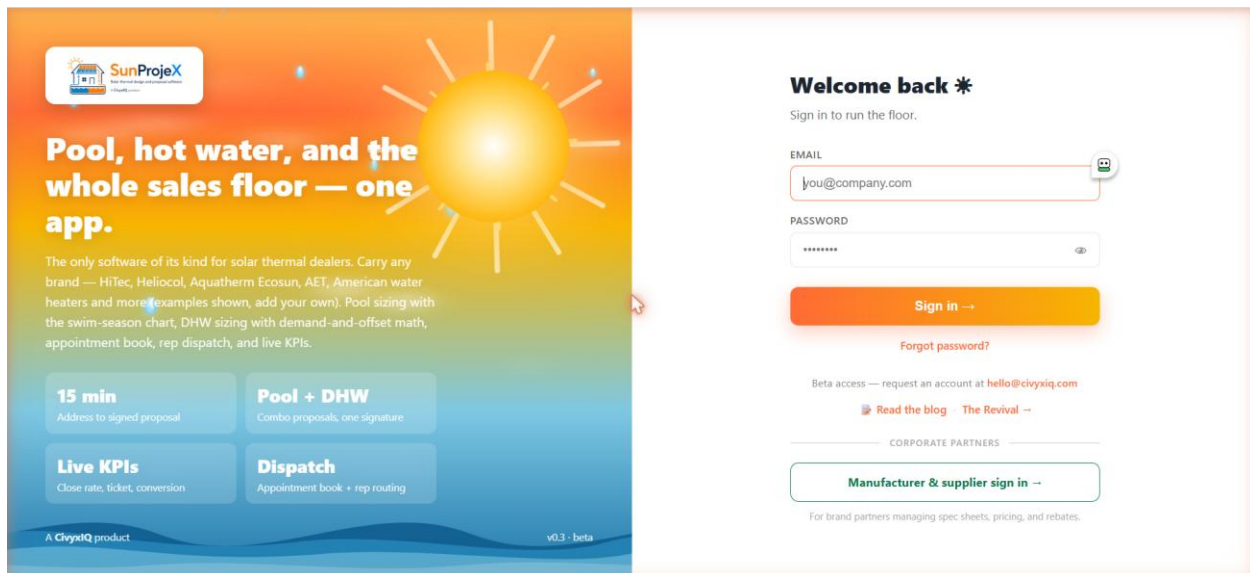
This guide walks you through your first day on SunProjeX. Eight sections, about 15 minutes to read end to end. Skip ahead if you want; the table of contents on the previous page has every section.

Let's get you set up.

2. Sign in and set up your account

Your founding partner welcome email has your login URL and a one time setup link. Click it, pick a password, and you are in.

1. Open app.sunprojex.com/login in your browser.
2. Enter the email address from your welcome email.
3. Enter the password you set during the welcome flow.
4. Click Sign in. You land on the Projects page (empty for now).
5. Want to change your password? Open the Back Office menu in the top right, click Back Office, scroll to the security section.

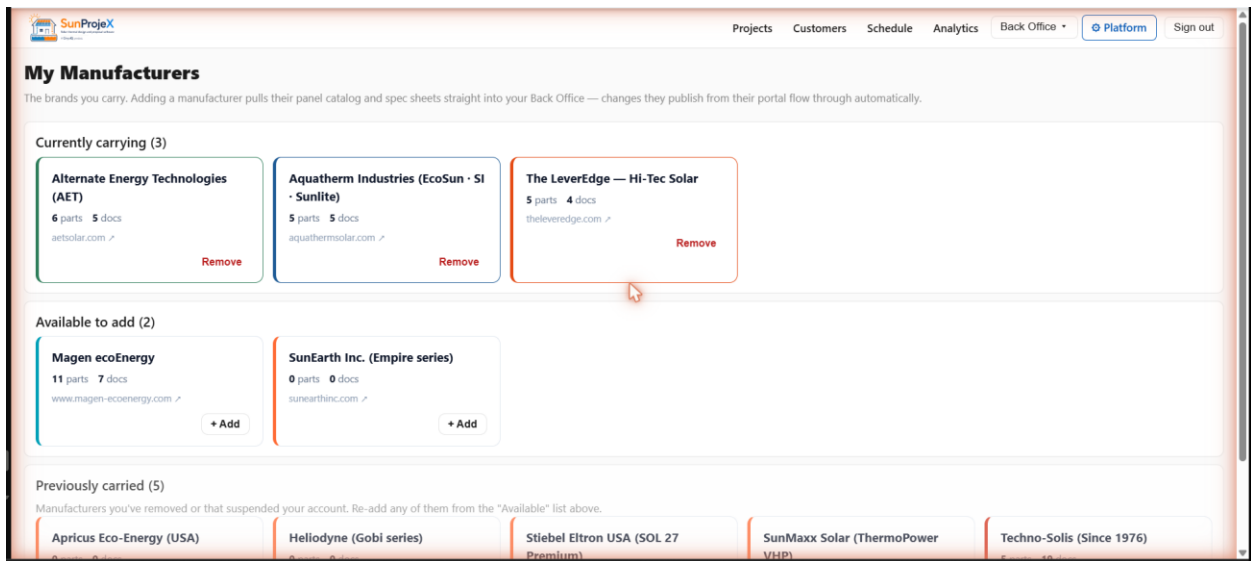


3. Pick your manufacturers

SunProjeX comes with a curated catalog of solar thermal manufacturers. The brands you carry determine which panel SKUs appear when you design projects, and the manufacturers' spec sheets and warranties auto-attach to every proposal you generate. No more hunting for the latest brochure.

1. Click the Back Office button in the top right of any screen.
2. Choose My Manufacturers from the dropdown.
3. Browse the active brands. Click + Add on each one you carry.
4. You can remove a brand later if you stop carrying it. Your project history stays intact.

Going forward, when a linked manufacturer publishes a new spec sheet or part, you see a small orange pill on the Back Office button counting what's new. Open the My Manufacturers page to clear it and see what changed.



4. Configure pricing and branding

One time setup so your proposals show your pricing and look like yours, not generic.

1. Back Office menu → Back Office.
2. Under Panel Pricing, set your price per panel by size. Common pool sizes are 4x8, 4x10, 4x12.
3. Under Branding, upload your logo (PNG with a transparent background) and enter your dealer name, phone, and address. These appear on every proposal.
4. Optional: set default accessory totals if most of your jobs include the same controllers, valves, and mounting kits. You can override per project.
5. Click Save.

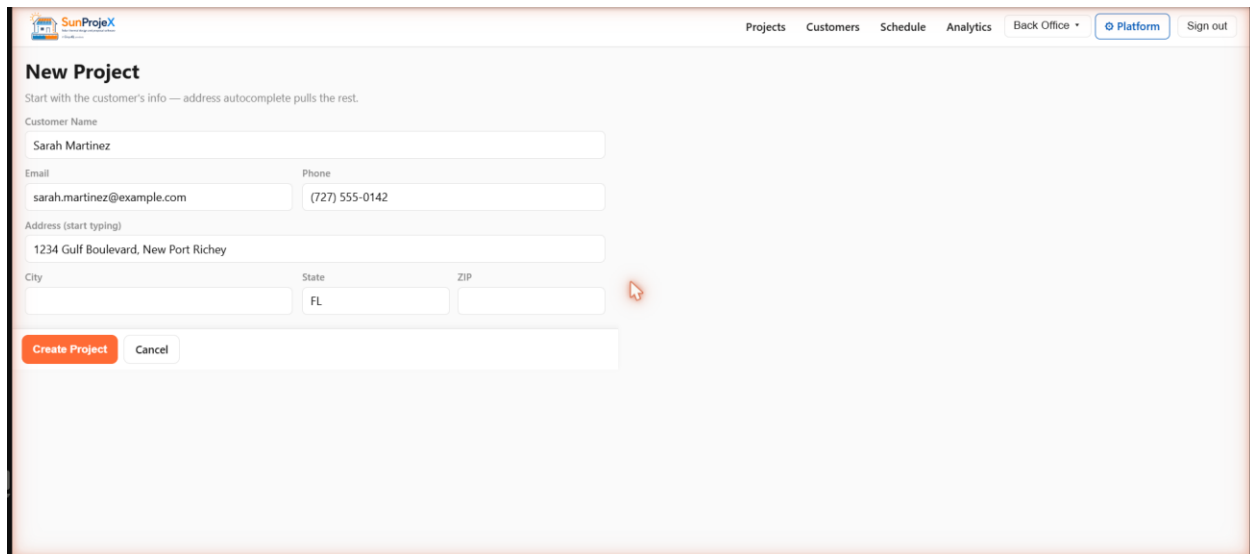
The screenshot shows the SunProjeX Back Office interface. At the top, there are navigation tabs: Projects, Customers, Schedule, Analytics, Back Office (selected), Platform, and Sign out. Below the navigation, there are three pricing modes: Simple (selected), Detailed, and Both. The Simple mode is described as 'Price per panel + adders'. The Detailed mode is 'Cost + labor + margin breakdown'. The Both mode is 'Toggle on the Price stage'. Under Simple Mode, there is a 'Default price per panel (\$)' field with the value 800. Below this, it says 'Used when a per-size price below is not set. Quote = (panels × price) + adders.' Under 'Pool Panel Prices by Size', there are three input fields for different panel sizes: 4' × 8' panel (\$), 4' × 10' panel (\$), and 4' × 12' panel (\$). The values are 794.25, 832.34, and 874 respectively. Below this is the 'Common Accessory Library' section, which contains a table of accessories. The table has columns for ON, CATEGORY, ITEM, QTY, PER PANEL, and UNIT COST (\$). There are three rows of accessories: Controller (Goldline AquaSolar Controller), Sensor (Pool Water Temp Sensor), and Sensor (Roof Temp Sensor). The Controller has a unit cost of 953.7, and the two sensors have a unit cost of 35. There are red arrows pointing to the unit cost fields for the Controller and the second Sensor. At the bottom left, there is a 'Save Back Office' button.

ON	CATEGORY	ITEM	QTY	PER PANEL	UNIT COST (\$)
<input type="checkbox"/>	Controller	Goldline AquaSolar Controller	1	<input type="checkbox"/>	953.7
<input type="checkbox"/>	Sensor	Pool Water Temp Sensor	1	<input type="checkbox"/>	35
<input type="checkbox"/>	Sensor	Roof Temp Sensor	1	<input type="checkbox"/>	35

5. Create your first project

A project in SunProjeX represents one customer at one address. Everything flows from there: design, pricing, proposal, install handoff.

1. From the Projects list, click New Project (orange button, top right).
2. Pick the project type: Pool Heating, Domestic Hot Water, or Combo (both on one job).
3. Enter the customer's name, phone, and email.
4. Enter the installation address. SunProjeX geocodes it automatically and loads the satellite imagery.
5. Click Create. The project opens on the Address stage.



The screenshot shows the 'New Project' form in the SunProjeX application. The form is titled 'New Project' and includes a sub-header: 'Start with the customer's info — address autocomplete pulls the rest.' The form fields are as follows:

- Customer Name:** Sarah Martinez
- Email:** sarah.martinez@example.com
- Phone:** (727) 555-0142
- Address (start typing):** 1234 Gulf Boulevard, New Port Richey
- City:** (empty)
- State:** FL
- ZIP:** (empty)

At the bottom of the form, there are two buttons: 'Create Project' (orange) and 'Cancel' (white). The top navigation bar includes links for 'Projects', 'Customers', 'Schedule', 'Analytics', 'Back Office', 'Platform', and 'Sign out'.

6. Trace the roof and place panels

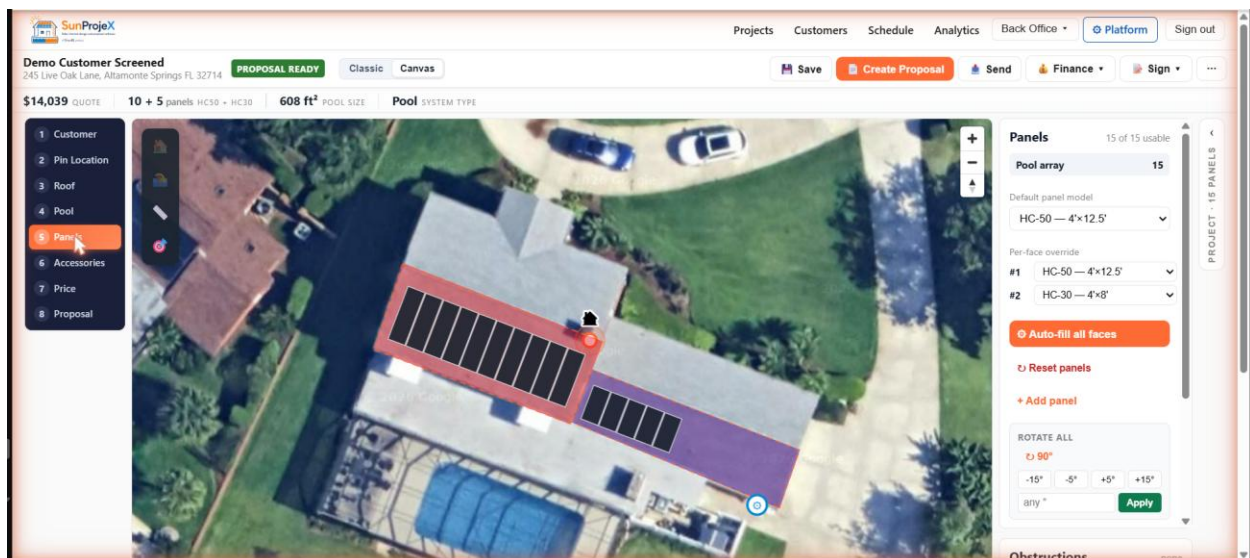
The canvas is where most of the design work happens. You trace each roof face, set its azimuth and pitch, and SunProjeX places panels for you with the right spacing and the right per face count.

Roof stage

1. Click each roof corner in turn to trace a face. Click the first corner again or hit Enter to close the polygon.
2. For each face, confirm the azimuth (the cardinal direction it faces) and pitch (slope in degrees).
3. The irradiance heatmap lights up in real time. South facing faces in Florida turn gold; north facing faces turn dim.
4. Trace as many faces as you need. Mark unused faces (chimneys, dormers) as 'not usable' to keep them out of panel placement.

Panels stage

1. Click Auto-fill to place panels at the recommended count for the system size.
2. Or click anywhere on a roof face to drop a panel manually.
3. Rotate selected panels with the $\pm 5^\circ$, $\pm 15^\circ$, or free degree controls in the toolbar.
4. Delete a panel by clicking it then pressing Delete.
5. Mix and match panel models per face if you want. Mixed SKU just works; pricing handles it correctly.



7. Pricing, accessories, and the proposal

SunProjeX computes the price from your settings and the panels you placed. Adjust accessories if this job needs different parts than your default.

Accessories

1. Toggle controllers, valves, mounting kits, and other accessories on or off as needed.
2. Totals update live as you change anything.

Price

1. Review the Customer Facing Quote. It shows the total, breakdown by category, and any line item adjustments.
2. Override individual line items if needed; typing in the price field saves immediately.
3. Mixed SKU jobs price each panel model at its own per size price, so a job with HC-50s and HC-30s prices correctly without you doing any math.

Proposal

1. Click Generate Proposal. SunProjeX builds a branded PDF and a customer facing share page.
2. Click Copy Link to grab the URL, or click Email to Customer to send it from your account.
3. The customer opens a clean page with your branding, the system specs, the price, an optional financing section, and a signature pad.
4. When they sign, you get an email notification and the project flips to Sold automatically.

SunProjeX

Projects Customers Schedule Analytics Back Office Platform Sign out


Demo Customer Screened PROPOSAL READY Classic Canvas

\$14,039 QUOTE 10 + 5 panels HC50 - HC30 608 ft² POOL SIZE Pool SYSTEM TYPE

1 Customer
2 Pin Location
3 Roof
4 Pool
5 Panels
6 Accessories
7 Price
8 Proposal

Proposal
Send the customer a share link — always shows the latest version, mobile-friendly, no PDF needed.

Copy Share Link Email Customer Preview as Customer Save PDF (optional)


AllSolar Energy Inc
 FL LICENSE - CVC056660

Ed
4074529957
ed@civysiq.com
4205 St. Johns Parkway

SOLAR POOL HEATING PROPOSAL # 00057

Prepared for Demo Customer Screened

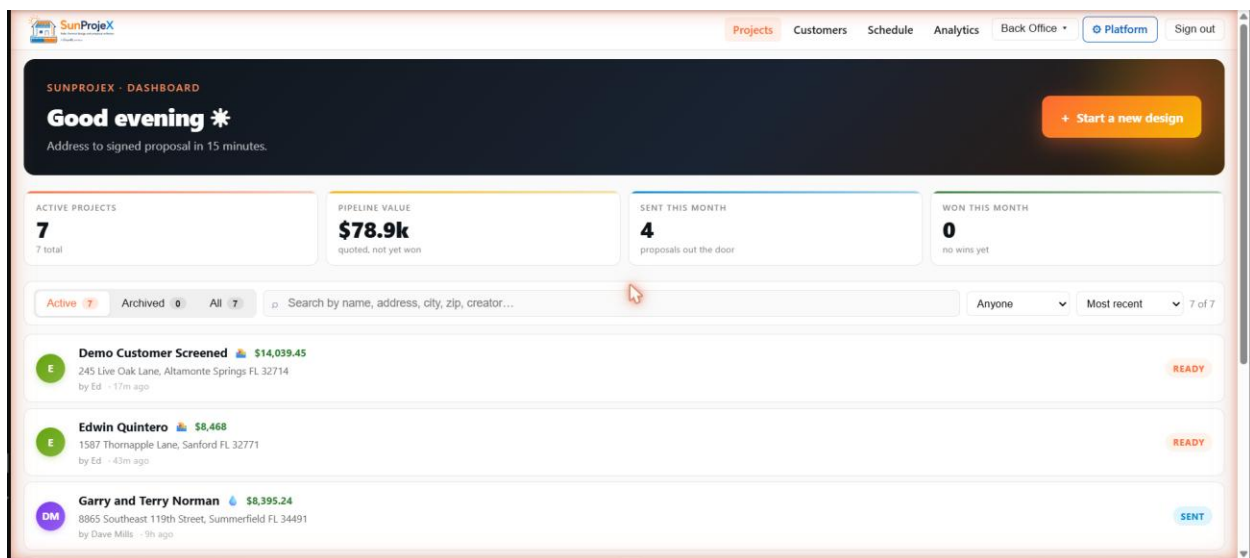
245 Live Oak Lane, Altamonte Springs, FL, 32714

<p>SOLAR COLLECTORS</p> <p>15</p> <p>10x HC-50 + 5x HC-30</p>	<p>HEATED SWIM DAYS</p> <p>up to 287</p> <p>pool at 80°F or warmer</p>	<p>EXTRA SWIM DAYS/YR</p> <p>154</p> <p>vs unheated baseline</p>	<p>SAVED VS GAS</p> <p>\$1,630/yr</p> <p>year 1, growing 4%/yr</p>
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8. Track your pipeline and close deals

Every project lives in your pipeline until you close it. SunProjeX gives you the visibility your spreadsheet never could.

1. The Projects list shows everything in flight with status pills (Quoting, Won, Lost).
2. When a customer signs the proposal, the project marks Sold automatically and the customer gets upserted into your CRM.
3. You can also Mark Sold or Mark Lost manually from the project header; useful for verbal yes deals that close without a signature.
4. On Sold, SunProjeX adds an entry to the Install Pipeline so your install team has the job immediately, with all the design notes attached.
5. Need to find a project later? Type the customer name or address in the search box at the top of the Projects list.



The screenshot displays the SunProjeX dashboard. At the top, there are navigation tabs for Projects, Customers, Schedule, Analytics, Back Office, Platform, and Sign out. The main header area includes a greeting "Good evening *", a notification "Address to signed proposal in 15 minutes.", and a "Start a new design" button. Below this, four summary cards provide key metrics: Active Projects (7 total), Pipeline Value (\$78.9k quoted, not yet won), Sent This Month (4 proposals out the door), and Won This Month (0 no wins yet). A search bar and filter options (Active, Archived, All) are present. The main content area lists three projects: "Demo Customer Screened" (\$14,039.45), "Edwin Quintero" (\$8,468), and "Garry and Terry Norman" (\$8,395.24), each with a status pill (READY or SENT) and a timestamp.

Need help?

We're a small team and we answer in hours, not days. If you hit anything confusing, drop us a note.

Email: support@civyxiq.com

In app help: app.sunprojex.com/app/help

Partner agreement: sunprojex.com/SunProjeX-Partner-Program.pdf