



# energy Orbit Lightning

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A New Platform

Darlene Weber-Scott, Technical Specialist





# Key

Please feel free to open your mic to ask a question or send a question via the chat window. If you are not asking a question, please stay muted to cut down on background noise.



Items identified with a blue arrow are relocated from energyOrbit Classic to energyOrbit Lightning



Items identified with a red oval are new features or methods in energyOrbit Lightning.

Why?



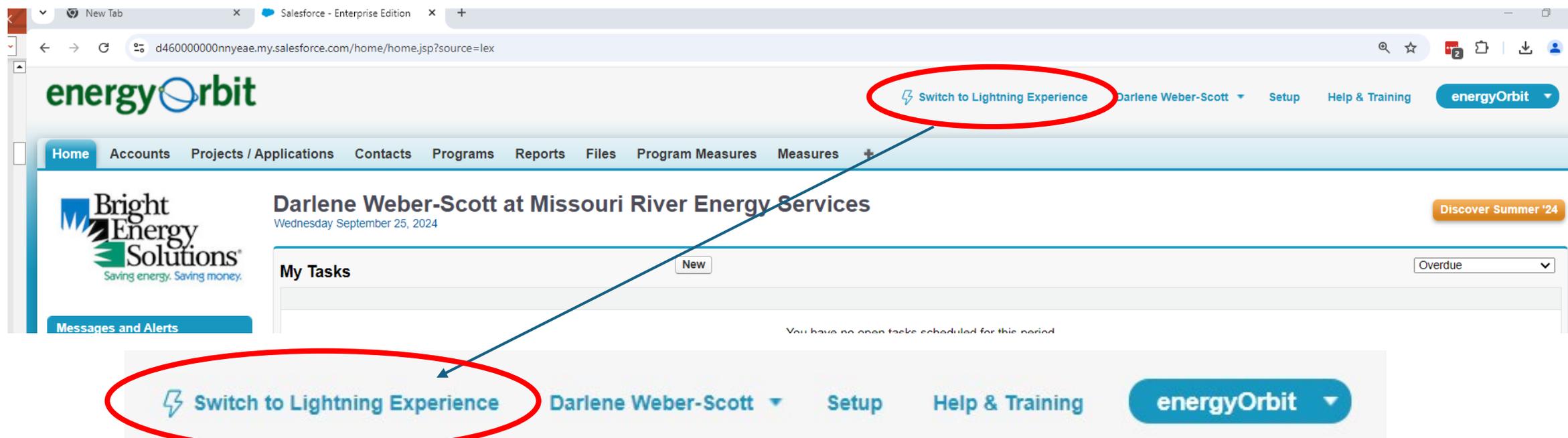
The Classic platform is no longer being supported by Salesforce.

“I cannot say whether things will get better if we change; what I can say is they must change if they are to get better.”

Georg C Lichtenberg

# Out with the Old – Home Screen

- If your home screen doesn't automatically convert to the Lightning version when you log in. Click this link to activate it.



The image shows a screenshot of a Salesforce home page. The browser address bar displays the URL: `d46000000nnyee.my.salesforce.com/home/home.jsp?source=lex`. The page header includes the **energyOrbit** logo on the left and a navigation bar on the right with the text **Switch to Lightning Experience**, **Darlene Weber-Scott**, **Setup**, **Help & Training**, and an **energyOrbit** dropdown menu. The **Switch to Lightning Experience** link is circled in red. Below the header is a navigation bar with tabs for **Home**, **Accounts**, **Projects / Applications**, **Contacts**, **Programs**, **Reports**, **Files**, **Program Measures**, and **Measures**. The main content area features the **Bright Energy Solutions** logo, the user name **Darlene Weber-Scott at Missouri River Energy Services**, and the date **Wednesday September 25, 2024**. A **My Tasks** section is visible, showing a **New** button and a filter set to **Overdue**. A **Discover Summer '24** button is also present. At the bottom, a **Messages and Alerts** section is partially visible. A second instance of the **Switch to Lightning Experience** link is shown in a separate view at the bottom, also circled in red, with a blue arrow pointing from the circled link in the top screenshot to this one.

# Out with the Old – maybe not

- If you have a problem that you can't figure out, you can bail out to the Classic version. We believe this option will be sunset on December 31 so we encourage you to not bail unless you must.

The screenshot shows the Salesforce Lightning interface for a user named Darlene Weber-Scott. The main content area displays a bar chart titled "YTD Total Incentives Paid V3 (For Chart)" showing the "Sum of Total Incentive Amount" for various utilities. The chart data is as follows:

Utility	Sum of Total Incentive Amount
Adrian Public Utilities	427
ALP - Alexandria Light & Power	85k
Alton Municipal Utilities	2.4k
Atlantic Municipal Utilities	15k
Barnesville Municipal Utilities	2.8k
Benson Municipal Utilities	8.9k
Beresford Electric Dept	5.7k
Big Stone City Municipal Utilities	1.7k
Breckenridge Public Utilities	2.4k
Brookings Municipal Utilities	90k
Denison Municipal Utilities	27k
Detroit Lakes Public Utilities	46k

The user profile menu is open, showing the user's name, email, and options for "Switch to Salesforce Classic" and "Add Username". The "Switch to Salesforce Classic" option is highlighted with a red circle. The "DISPLAY DENSITY" section shows "Comfy" selected, and the "OPTIONS" section also shows "Switch to Salesforce Classic" highlighted with a red circle.

# Out with the Old – Home Screen

**Bright Energy Solutions**  
Saving energy. Saving money.

**Vida Iten at Missouri River Energy Services**  
Tuesday August 20, 2024

**My Tasks** New Overdue  
You have no open tasks scheduled for this period.

**Dashboard** Refresh Customize Page  
As of 7/7/2021 8:26 AM. Displaying data as Vida Iten.

**YTD Incentives Paid**  
Bar chart showing Sum of Total Incentive Amount for Utility Worthington Pu. at \$25,823.90.

**YTD KW Goals**  
Table:

Utility Code	Sum of MRES KW %
WRTH	63

**YTD kWh Goals**  
Table:

Utility Code	Sum of State kWh %
WRTH	16

**Calendar** Calendar Help  
Today 8/20/2024  
You have no events scheduled for the next 7 days.

**Recent Items**

- WRTH - 068133 - R-HVAC-24 - Donald & Patricia Bents
- Quality Installation - Central AC
- Quality Installation - Central AC
- Donald & Patricia Bents
- WRTH - 068131 - R-HVAC-24 - Douglas Brouwer
- Central AC/ASHP Tune-Up
- Central AC/ASHP Tune-Up
- Douglas Brouwer
- WRTH - 068100 - R-HVAC-24 - Angie Mixner
- Quality Installation - Central AC

2:57 PM 8/20/2024

# In with the New – Home Screen

**MISSOURI RIVER ENERGY SERVICES**

EnergyOrbit Lightning... Home Accounts Projects / Applications Contacts Programs Model or AHRI Reports Files

**Recent Records**

- YTD Total Incentives Paid V3 (For Chart)
- YTD kWh Goals
- YTD kW Goals
- Current Projects
- WRTH - 066443 - R-HVAC-24 - Jared Harwood

**YTD Total Incentives Paid V3 (For Chart)**

Utility	Sum of Total Incentive Amount
Worthington Public Utilities	28k

**YTD kW Goals**

Utility Code	kW %
WRTH	28%

**YTD kWh Goals**

Utility Code	kWh %
WRTH	28%

**QUICK LINKS:**

- BES Home Page
- BES Members Only Page
- MRES Home Page
- BES Calendar

**Today's Tasks**

**My Upcoming Events**

0 items, sorted by Start Date & Time  
Filtered by Start Date

# Out with the Old – Account Page

energyOrbit

Logged in as Vida Iten (viten@worthingtonutilities.com)

Vida Iten Setup Help & Training energyOrbit

Home Accounts Projects / Applications Contacts Programs Reports Files +

Bright Energy Solutions Saving energy. Saving money.

All Customer Accounts Clone Create New View

New Account

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

Action	Account Name ↑	Account Number	Install Street	Install City	Service Status	MRES Rep	Primary Contact Pho...	Account Record Type	Utility
Edit   Del	A & T Tap	6043500004	107 12Th Street	Worthington	Active	Darlene Weber-Scott	(507) 376-6556	2-Commercial Custo...	Worthington Public U.
Edit   Del	Aaron & Jensine Kin...	13031600104	1015 Smith Ave	Worthington	Active	Darlene Weber-Scott	(651) 328-9195	1-Residential Custo...	Worthington Public U.
Edit   Del	Aaron Hagen	36021800103	818 Miles Drive	Worthington	Active	Darlene Weber-Scott	(641) 590-1259	1-Residential Custo...	Worthington Public U.
Edit   Del	Aaron Mormann	35011100002	413 Oxford St W	Worthington	Active	Darlene Weber-Scott	(507) 329-3656	1-Residential Custo...	Worthington Public U.
Edit   Del	Abeba Addis Adela	17051100103	1505 Miller Street	Worthington	Active	Darlene Weber-Scott	(507) 727-2915	1-Residential Custo...	Worthington Public U.

Messages and Alerts

December is here! A new year is just around the corner. Happy Holidays from the Bright Energy Solutions team!

# In with the New – Account Page

energyOrbit Home Accounts Projects / Applications Contacts Programs Reports Files

Accounts  
**All Residential Customer Accounts** 

50+ items • Sorted by Account Name • Filtered by All accounts - Account Record Type • Updated a few seconds ago

[New](#) [Discover Companies](#) [Printable View](#) [Intelligence View](#)

Search this list...

	Account Name ↑	Primary Contact Name	Account Number	Install Street	Utility Code	Phone ↑	Service Status	MRES Rep	Created Date
1	<input type="checkbox"/> Aaron & Jensine Kinser		13031600104	1015 Smith Ave	WRTH		Active	Darlene Weber-Scott	8/24/2017 10:43 AM
2	<input type="checkbox"/> Aaron Hagen		36021800103	818 Miles Drive	WRTH		Active	Darlene Weber-Scott	8/24/2017 10:43 AM
3	<input type="checkbox"/> Aaron Mormann		35011100002	413 Oxford St W	WRTH		Active	Darlene Weber-Scott	8/24/2017 10:43 AM
4	<input type="checkbox"/> Abeba Addis Adela	Addis Adela, Abeba	17051100103	1505 Miller Street	WRTH		Active	Darlene Weber-Scott	9/21/2022 8:44 AM
5	<input type="checkbox"/> Adam Adolph	Adolph, Adam	11011700002	239 9th Avenue	WRTH		Active	Darlene Weber-Scott	6/17/2020 3:26 PM
6	<input type="checkbox"/> Adam Bastman		6043700507	1116 2Nd Avenue	WRTH		Active	Darlene Weber-Scott	8/24/2017 10:43 AM
7	<input type="checkbox"/> Adam Eisenga		42101000003	1970 Bay St	WRTH		Active	Darlene Weber-Scott	8/24/2017 10:43 AM
8	<input type="checkbox"/> Adam Johnson		34041200603	220 W Clary St	WRTH		Active	Darlene Weber-Scott	8/24/2017 10:43 AM

# In with the New – Account Creation Page

- Just a few changes
  - The layout in general is only slightly different from energyOrbit Classic.
  - When selecting a program, if the desired program isn't showing because it wasn't a recently used program enter 2024 rather than \*2024 and the first line will be show me more results for 2024.
  - The Search address is optional, you may use it like Google Maps and it will search for existing addresses or you may skip to manually enter the install address.
  - We have added one new field for a second account holder for joint accounts.
  - If the mailing address and the install address are the same, you can copy the information over to the mailing address by checking the box.



New Account: 1-Residential Customer

\* = Required Information

Details

\* Program Selection (REQUIRED) Residential HVAC - 2024

\* Account Name Fred Rogers

\* Account Number 0000123

\* Utility Worthington Public Utilities

Utility Address  
This field is calculated upon save

Install Address  
315 Clary

315 Clary Street

Install City Worthington Install State/Province MN

Install Zip/Postal Code 56187 Install Country United States

Mailing same as Install Address

Additional Account Holder  
Ginger Rogers

\* Primary Contact Phone  
507-999-9999

Primary Contact Email  
won'tyoubemyneighbor@gmail.com

Website

Service Status  
Active

Notes

Mailing Address  
Search Address

Mailing Street

Mailing City Mailing State/Province

Mailing Zip/Postal Code Mailing Country

Cancel Save & New Save

Section (218) 299-5400 500 Center Ave Moorhead MN

# In with the New – Account Creation Page-C&I Customer

Details

\* Program Selection (REQUIRED) ⓘ ↻  
C&I Compressed Air - 2024 ✕

\* Account Name ⓘ ↻  
Whatchamacallit

\* Account Number ⓘ ↻  
9994444

\* Utility ⓘ ↻  
Worthington Public Utilities ✕

Utility Address  
*This field is calculated upon save*

Install Address ⓘ ↻  
601 Humis 🔍

Install Street  
North Humiston Avenue

Install City  
Worthington

Install State/Province  
MN

Install Zip/Postal Code  
56187

Install Country  
United States

Mailing same as Install Address

Corporate Office Location City ⓘ ↻  
Timbuktu 🔍

Corporate Office Location State ⓘ ↻  
MN

Account Holder ⓘ ↻  
Wanna Makeit

Primary Contact Name ⓘ ↻  
JB Weld

\* Primary Contact Phone ⓘ ↻  
999444222

Primary Contact Email ⓘ ↻  
makingwatchmacallits@hotmail.com 🔍

Phone ⓘ ↻  
5072223333 🔍

Website

Service Status ⓘ ↻  
Active ▼

Notes

Mailing Address  
Search Address 🔍

Mailing Street

Mailing City

Mailing State/Province

Mailing Zip/Postal Code

Mailing Country

Cancel Save & New Save

# In with the New – Account Creation Page-C&I Customer

Search Accounts...

### General Info

Percent of Utility Load

Corporate Office Location City

Corporate Office Location State

Other Locations (City,State)

Products Produced Locally

Year Established in Community (YYYY)

Number of Shifts

Expansion Plans

Future Distributed Energy Resource Plans

Bright Energy Choices (REC's)

Sustainability or Environmental Goals

Number of Electric Meters

Billing Class

Transformer Owned By

Power Factor Charge

### Other Utility Services

Available

- Water
- Wastewater
- Natural Gas
- None

Chosen

MRES Ranking

### MRES Preventive Maintenance

Available

- Compressed Air Leak ...

Chosen

### Internal Equipment & Processes

Compressed Air System

Total Horse Power

VFD Compressor Included in System

Compressor 1: Type

Compressor 1: Horsepower

Compressor 1: VFD

Compressor 2: Type

Compressor 2: Horsepower

Compressor 2: VFD

Compressor 3: Type

Compressor 3: Horsepower

Painting Processes

Refrigeration/Cold Storage

### Plastic Manufacturing

Available

- None
- Extrusion
- Molding

Chosen

Laser Cutting

Total Quantity in Vehicle Fleet

Number of EVs in Fleet

Level 2 EV Chargers Onsite

Level 3 (DC Fast Chargers) Onsite

Future EV Plans

Other Info

# New Customer Account Page and How to Start a Project

- Account summary at the top
- Now in tabular format.
- Select the Program as before
- Initiate EE Project is on the top right of the page.

The screenshot displays a customer account page for 'Fred Rogers'. At the top right, there are buttons for 'Edit', 'Initiate EE Project', and 'New Note'. A red arrow points from the 'Initiate EE Project' button in the bottom right corner to the 'Initiate EE Project' button in the top right corner. In the 'Account Details' section, the 'Program Selection (REQUIRED)' field is circled in red, showing 'Residential HVAC - 2024'. Below this, the account name 'Fred Rogers', account number '9000000123', and utility are listed. On the right side, there are fields for 'Additional Account Holder' (Ginger Rogers), 'Primary Contact Phone' (507-999-9999), 'Primary Contact Email' (fr-gr@gmail.com), and 'Website'.

Type	Phone	Website	Account Owner	Industry	Install Address
	507-999-9999		<a href="#">Darlene Weber-Scott</a>		123 Elm St Worthington, MN 56187

[Projects \(Customer\) \(4\)](#) [Contacts \(1\)](#) [Notes & Attachments \(0\)](#) [Project Payments \(0\)](#) [Sites \(1\)](#) [Account Notes \(0\)](#)

**Account Details** | Project Creation Information | System Information | Related Contacts, Projects, A... | Payment Information

**Program Selection (REQUIRED)**  
[Residential HVAC - 2024](#)

**Account Name**  
Fred Rogers

**Account Number**  
9000000123

**Utility**

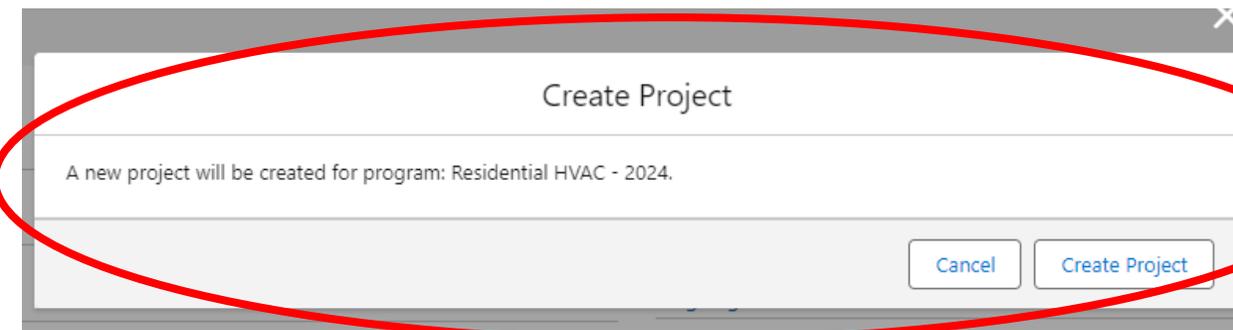
**Additional Account Holder**  
Ginger Rogers

**Primary Contact Phone**  
507-999-9999

**Primary Contact Email**  
fr-gr@gmail.com

**Website**

# Entering the Project Information



- After Initiating an EE project, a confirmation that you have created a new project pops up.
- Move to the **Project Status** tab to enter the primary contractor, project cost, the application received date and project completion date that you have done in the past.

Project / Application  
WRTH - 066597 - R-HVAC-24 - Fred Rogers

Project Measures (0) Notes & Attachments (0) Project Payments (0) Project / Application Hist... Work Orders (1) Project Notes (0)

**Project Status** MRES Project Summary Payment Details Pre-Approval System Info

Section

Project / Application Name	WRTH - 066597 - R-HVAC-24 - Fred Rogers	Project Status	Application Received
Program	Residential HVAC - 2024	Authorize Incentive	<input type="checkbox"/>
Account	Fred Rogers	Reset Application	<input type="checkbox"/>
Account Number	900000123	Hold	
Primary Project Contact	Fred Rogers	Hold Reason (Other):	
Primary Contractor		Deny	
Project Cost (\$)		Deny Reason (Other):	
Received Date		Included Measures Description	
Installation Date		Record Type	Residential
Project is Self-Installed	<input type="checkbox"/>		
Customer or Alt Payee Account			
Included Measure Description (TEXT)			

# New Project Page – Project Measures

energyOrbit Home Accounts Projects / Applications Contacts Programs Reports Files

Project / Application  
WRTH - 066182 - R-HVAC-24 - Fred Rogers

Project Measures (0) Notes & Attachments (0) Project Payments (0) Project / Application Hist... Work Orders (1) Project Notes (0)

Notes & Attachments (0)

New Opportunity New Case Edit

energyOrbit Home Accounts Projects / Applications Contacts Programs Reports Files

Project / Application  
WRTH - 066182 - R-HVAC-24 - Fred Rogers

Project Measures (0) Notes & Attachments (0) Project Payments (0) Project / Application Hist... Work Orders (1) Project Notes (0)

Notes & Attachments (0)

Project Measures

0 items • Updated a few seconds ago

<input type="checkbox"/>	Project Measure Name	FORCED	Baseline Incentive	Total Quantity	Electric Incentive	Gas Incentive	Electrification Incentive	kWh Savings	kW Savings	Therms Savings
No items to display.										

Change Owner New Project Measure

# Project Measure Page – same old, same old

energyOrbit Home Accounts Projects / Applications Contacts Programs Reports Files Setup

## Project Measure Edit

New Project Measure

« Back to Project / Application

Project **WRTH - 066182 - R-HVAC-24 - Fred Rogers**

### Select Measure

Measure Name	Measure Type	Equipment Type
<input type="text" value="Enter filter criteria"/>	<input type="text"/>	<input type="text"/>
Air-Source Heat Pump	Air Source Heat Pump	ASHP
Air-Source Heat Pump (Dual Fuel Tax Credit)	Air Source Heat Pump	ASHP
Air-Source Heat Pump (Tax Credit)	Air Source Heat Pump	ASHP
Central AC	Air Conditioning	Central AC
Central AC 18+ SEER2	Air Conditioning	Central AC
Central AC/ASHP Tune-Up	AC/ASHP Tune-up	AC/ASHP Tune-Up
DesuperHeater	Geothermal Heat Pump	Desuperheater
Direct Geoexchange (DGX)	Geothermal Heat Pump	DGX
Dual Fuel Air-Source Heat Pump	Air Source Heat Pump	ASHP

# Project Measure Page – same old, same old

energyOrbit Home Accounts Projects / Applications Contacts Programs Reports Files Measures

Quality Installation - Air-Source Heat Pump	QI - Central ASHP	Heat Pump
Quality Installation - Dual Fuel ASHP	QI - Central ASHP	Heat Pump
Quality Installation ASHP (Dual Fuel Tax Credit)	QI - Central ASHP	Heat Pump

**Installation Details** Required Information

Project Measure Name: Quality Install-Air Source Heat Pump (Tax Credit) Status: Included

Quantity:  Per Unit

**Equipment Model Details**

Model or AHRI:  Select Clear

**QI - Central ASHP Parameters**

Occupancy Classification: Residential

Serial Number (Outdoor Unit):

Manufacturer (Outdoor Unit):

Model Number (Outdoor Unit):

Reference Number Not Found:

Start-up/Testing Date:  [ 9/25/2024 ]

SEER:

SEER2:

EER:

EER2:

Other Occupancy (please enter):

Serial Number (Indoor Unit):

Manufacturer (Indoor Unit):

Model Number (Indoor Unit):

Size (Tons):

Outdoor Temperature:

HSPF:

HSPF2:

Total Incentive Override:

Save Save & New Save & Enter Responses Cancel

# New Project Page – Projects Tab

- Now when you click the Projects(Customer) tab a list of projects appears. You can proceed to the project by clicking the project from the list.

Phone: 507-999-9999 | Website: | Account Owner: Darlene Weber-Scott | Industry: | Install Address: 123 Elm St, Worthington, MN 56187

Projects (Customer) (1) | Contacts (1) | Notes & Attachments (0) | Project Payments (0) | Sites (1) | Account Notes (0)

### Projects (Customer)

item • Sorted by Payment Date • Updated a few seconds ago

<input type="checkbox"/>	Project / Application Name	Project Status	Payment Date ↑	Total Incentive Amount	Total kW Savings	Total kWh Savings	Total Therms Savings	
1	<input type="checkbox"/> WRTH - 066182 - R-HVAC-24 - Fred Rogers	Application Received		\$0.00	0.00000000	0.00	0.00	

[View All](#)



ew Project Measure

Save

Edit

Delete



# Attachments

Add documents by clicking the upload files box. Now you can add more than one document at a time!!

The screenshot shows the energyOrbit web application interface. The browser address bar displays the URL: `d46000000nnyee.lightning.force.com/lightning/r/ea3_Ecology_Project_c/a0OPo00008F5lyMAC/view`. The application header includes the energyOrbit logo, a search bar, and navigation menus for Home, Accounts, Projects / Applications, Contacts, Programs, Reports, and Files. The main content area is titled "Project / Application" and "WRTH - 066182 - R-HVAC-24 - Fred Rogers". Below the title, there are several tabs: "Notes & Attachments (0)", "Project Payments (0)", "Project / Application Hist...", "Work Orders (1)", and "Project Notes (0)". The "Notes & Attachments (0)" tab is active, showing a table with columns for Title, Created By, Last Modified, and Size. The table is currently empty, displaying "No items to display." and a "View All" link. In the top right corner of the "Notes & Attachments" section, there is a settings gear icon, a refresh icon, and an "Upload Files" button. A blue arrow points to the "Upload Files" button, and another blue arrow points to the "Notes & Attachments (0)" tab.

Project / Application  
WRTH - 066182 - R-HVAC-24 - Fred Rogers

Notes & Attachments (0) Project Payments (0) Project / Application Hist... Work Orders (1) Project Notes (0)

Notes & Attachments (0)

0 items • Sorted by Last Modified • Updated a few seconds ago

Title	Created By	Last Modified ↓	Size
No items to display.			

View All

Post-Inspection Required

Upload Files

# Project Page – Sending an email

Project / Application  
**WRTH - 066182 - R-HVAC-24 - Fred Rogers**

Project Status: **MRES** | Project Summary | Payment Details | Pre-Approval | System Info

Section

Requires MRES Approval:

Application Reviewed By: \_\_\_\_\_

Ignore Project Lock:

Verified Charger Connected to Portal:

New Construction:

Pre-Inspection Required:

Pre-Inspection By: \_\_\_\_\_

Pre-Inspection Date: \_\_\_\_\_

Post-Inspection Required:

Post-Inspection By: \_\_\_\_\_

Post-Inspection Date: \_\_\_\_\_

Project Notes (0)

Open Activities (0)

Project Payments (0)

Activity History (0)

Work Orders (1)

WRTH - 066182 - R-HVAC-24 - Fred Rogers  
Program: Residential HVAC - 2024  
Incentive: 250.00  
kWh Savings: 4,676.00  
[View All](#)

Project / Application History (3+)

Date:	8/21/2024 9:58 AM
Field:	Total Incentive Amount
User:	Darlene Weber-Scott
Original Value:	\$0
New Value:	\$250
Date:	8/21/2024 9:58 AM
Field:	Total Incentive Amount
User:	Darlene Weber-Scott
Original Value:	\$250
New Value:	\$0
Date:	8/21/2024 9:58 AM
Field:	Total Incentive Amount
User:	Darlene Weber-Scott

Email

View All

# Project Page – Sending an email with a template

R-HVAC-24 - Fred Rogers  
Residential HVAC - 2024

Email

\*From: Darlene Weber-Scott <darlene.weber-scott@mrener...>

To: Cc

Bcc: darlene.weber-scott@mrenergy.com X

Subject: Enter Subject...

Font Size B I U A

Insert a template...  
Save as new template...  
Save template...

Related To: WRTH - 066182 - R-HVAC-... X

Send

10:46 AM  
8/21/2024

Insert Email Template

Select a template for: Contacts Leads Projects / Applications

Templates: All Classic Templates

Template Folders: MRES

Search: Search templates...

Name	Description	Template Folders
ChargePoint Charger project	ChargePoint Charger project notice	MRES
Rebate Preapproval	Rebate Preapproval Letter	MRES
Residential App Received Via Email	Customizable response	MRES
MRES Application Deny Notification	Customizable response	MRES
Application Over 365 Days	Customizable response	MRES
Application Deny Notification	Customizable response	MRES
Application Hold Notification	Customizable response	MRES
On HOLD for 90 Days	On HOLD for 90 Days	MRES
On HOLD for 60 Days	On HOLD for 60 Days	MRES

Cancel

# Project Page – Deeper Dive Project Status

The screenshot shows a web browser window with the URL `d46000000nyeeae.lightning.force.com/lightning/r/ro3_Ecology_Project__c/a00Po000008F5lyMAC/view`. The page is titled "Project / Application" and "WRTH - 066182 - R-HVAC-24 - Fred Rogers". The navigation menu includes "Home", "Accounts", "Projects / Applications", "Contacts", "Programs", "Reports", "Files", and "Measures".

Below the navigation, there are tabs for "Project Measures (1)", "Notes & Attachments (0)", "Project Payments (0)", "Project / Application Hist...", "Work Orders (1)", and "Project Notes (0)".

The main content area is titled "Project Status" and has sub-tabs for "MRES", "Project Summary", "Payment Details", "Pre-Approval", and "System Info".

Under the "Section" header, there are two columns of fields, each with an edit icon:

Field Name	Value	Field Name	Value
Project / Application Name	WRTH - 066182 - R-HVAC-24 - Fred Rogers	Project Status	Application Received
Program	Residential HVAC - 2024	Authorize Incentive	<input type="checkbox"/>
Account	Fred Rogers	Reset Application	<input type="checkbox"/>
Account Number	9000000123	Hold	<input type="checkbox"/>
Primary Project Contact	Fred Rogers	Hold Reason (Other)	
Primary Contractor	Lowe's Sheet Metal Inc	Deny	
Project Cost (\$)	\$20,000.00	Deny Reason (Other)	
Received Date	8/20/2024	Included Measures Description	Mini-Split / Ductless Air Source Heat Pump.
Installation Date	8/6/2024	Record Type	Residential
Project is Self-Installed	<input type="checkbox"/>		
Customer or Alt Payee Account	Fred Rogers		
Included Measure Description (TEXT)	Mini-Split / Ductless Air Source Heat Pump.		

# Project Page – Deeper Dive MRES tab

The screenshot shows a web browser window displaying the energyOrbit Project Page for 'WRTH - 066182 - R-HVAC-24 - Fred Rogers'. The browser address bar shows the URL: `d46000000nnyeae.lightning.force.com/lightning/r/ea3_Ecology_Project_c/a00Po000008F5lyMAC/view`. The energyOrbit logo is in the top left, and a search bar is in the top right. The navigation menu includes Home, Accounts, Projects / Applications (selected), Contacts, Programs, Reports, Files, and Measures. The page header identifies the project as 'Project / Application WRTH - 066182 - R-HVAC-24 - Fred Rogers'. Below the header, there are tabs for Project Measures (1), Notes & Attachments (0), Project Payments (0), Project / Application Hist..., Work Orders (1), and Project Notes (0). The main content area has tabs for Project Status, MRES (selected), Project Summary, Payment Details, Pre-Approval, and System Info. Under the MRES tab, there is a 'Section' header and a list of fields with checkboxes and edit icons. The fields are: Requires MRES Approval, Application Reviewed By, Ignore Project Lock, Verified Charger Connected to Portal, New Construction, Pre-Inspection Required, Pre-Inspection By, Pre-Inspection Date, Post-Inspection Required, Post-Inspection By, and Post-Inspection Date.

energyOrbit Home Accounts Projects / Applications Contacts Programs Reports Files Measures

Project / Application  
**WRTH - 066182 - R-HVAC-24 - Fred Rogers**

Project Measures (1) Notes & Attachments (0) Project Payments (0) Project / Application Hist... Work Orders (1) Project Notes (0)

Project Status **MRES** Project Summary Payment Details Pre-Approval System Info

Section

Requires MRES Approval

Application Reviewed By:

Ignore Project Lock

Verified Charger Connected to Portal

New Construction

Pre-Inspection Required

Pre-Inspection By:

Pre-Inspection Date

Post-Inspection Required

Post-Inspection By:

Post-Inspection Date

# Project Page – Deeper Dive

## Project Summary tab

The screenshot shows the energyOrbit web interface. At the top, there is a search bar and a navigation menu with options: Home, Accounts, Projects / Applications (selected), Contacts, Programs, Reports, Files, and Measures. Below the navigation is a header for the project: "Project / Application WRTH - 066182 - R-HVAC-24 - Fred Rogers". A secondary navigation bar contains links for Project Measures (1), Notes & Attachments (0), Project Payments (0), Project / Application Hist..., Work Orders (1), and Project Notes (0). The main content area has tabs for Project Status, MRES, Project Summary (active), Payment Details, Pre-Approval, and System Info. Under the Project Summary tab, there is a "Section" header and a list of metrics with edit icons: Audit Date, Total kWh Savings (4,676.00), Total kW Savings (0.53000000), Total Therms Savings (0.00), Total kWh Added (0.00), Total kW Added (0.00000000), and Total Lifetime kWh Added (0.00). Below this is a "Project Measures (1)" section with a table. The table has columns for Project Me..., FORCED, Baseline Inc..., Total Quan..., Electric Inc..., Gas Incenti..., Electrificat..., kWh Savings, and kW Savings. One measure is listed: "1 Mini-Split / Ductle" with a checked checkbox, a value of \$250.00, a quantity of 1.00, an electric incentive of 250.00, kWh savings of 4,676.00, and kW savings of 0.53000000. There are also buttons for "New Project Measure" and "Change Owner".

energyOrbit Home Accounts Projects / Applications Contacts Programs Reports Files Measures

Project / Application  
**WRTH - 066182 - R-HVAC-24 - Fred Rogers**

Project Measures (1) Notes & Attachments (0) Project Payments (0) Project / Application Hist... Work Orders (1) Project Notes (0)

Project Status MRES **Project Summary** Payment Details Pre-Approval System Info

Section

Audit Date ⓘ Total kWh Added ⓘ  
0.00

Total kWh Savings ⓘ Total kW Added ⓘ  
4,676.00 0.00000000

Total kW Savings ⓘ Total Lifetime kWh Added ⓘ  
0.53000000 0.00

Total Therms Savings ⓘ  
0.00

**Project Measures (1)** [Settings] [Refresh] [New Project Measure] [Change Owner]

1 item • Updated a few seconds ago

<input type="checkbox"/>	Project Me... ▾	FORCED ▾	Baseline Inc... ▾	Total Quan... ▾	Electric Inc... ▾	Gas Incenti... ▾	Electrificat... ▾	kWh Savings ▾	kW Savings ▾
1	<input type="checkbox"/> Mini-Split / Ductle	<input checked="" type="checkbox"/>	\$250.00	1.00	250.00			4,676.00	0.53000000

View All

# Project Page – Deeper Dive Payment Details

The screenshot shows a web browser window with the URL `d46000000nnyeeae.lightning.force.com/lightning/r/eo3__Ecology_Project__c/a0OPo000008F5lyMAC/view`. The application header includes the 'energyOrbit' logo and a navigation menu with items like Home, Accounts, Projects / Applications, Contacts, Programs, Reports, Files, and Measures. A search bar is also present.

The main content area is titled 'Project / Application' and 'WRTH - 066182 - R-HVAC-24 - Fred Rogers'. Below this, there are several tabs: Project Measures (1), Notes & Attachments (0), Project Payments (0), Project / Application Hist..., Work Orders (1), and Project Notes (0). The 'Payment Details' tab is currently selected.

Under the 'Payment Details' tab, there are several sections for editing project information:

- Customer or Alt Payee Account:** Fred Rogers
- Customer Incentive Payee Amount:** \$250.00
- Contractor Payee Account:** (empty)
- Contractor Incentive:** \$0.00
- Total Incentive Amount:** \$250.00
- Contractor Address:** (empty)
- FORCED:**
- Total MRES Efficiency Incentive:** \$250.00
- Total Utility Paid EE Incentive:** \$0.00
- Total Utility Paid Gas Incentive:** \$0.00
- Total MRES Electrification Incentive:** \$0.00
- Payment Date:** (empty)

# Project Page – Deeper Dive Pre-Approval

The screenshot displays the energyOrbit web application interface. At the top, the browser address bar shows the URL: `d46000000nnyee.lightning.force.com/lightning/r/ea3__Ecology_Project__c/a0OPo000008F5lyMAC/view`. The application header includes the energyOrbit logo, a search bar, and a navigation menu with items: Home, Accounts, Projects / Applications (selected), Contacts, Programs, Reports, Files, and Measures.

The main content area is titled "Project / Application" and "WRTH - 066182 - R-HVAC-24 - Fred Rogers". Below this, there are several tabs: Project Measures (1), Notes & Attachments (0), Project Payments (0), Project / Application Hist..., Work Orders (1), and Project Notes (0).

The "Pre-Approval" tab is active, showing a navigation bar with "Project Status", "MRES", "Project Summary", "Payment Details", "Pre-Approval" (selected), and "System Info".

Under the "Pre-Approval" tab, there is a "Section" header. Below it, a table lists various fields for editing:

Project Pre-Approved <input type="checkbox"/>	Pre-Approval Description
Pre-Approval Type	Pre-Approval Date
Pre-Approval Value (\$)	Expiration Date
Forecast Probability %	Projected Completion
Related Project #1	Related Project #3
Related Project #2	Related Project #4

# Project Page – System Info

## System Info

energyOrbit Home Accounts Projects / Applications Contacts Programs Reports Files Measures

Project / Application  
**WRTH - 066182 - R-HVAC-24 - Fred Rogers**

Project Measures (1) Notes & Attachments (0) Project Payments (0) Project / Application Hist... Work Orders (1) Project Notes (0)

Project Status MRES Project Summary Payment Details Pre-Approval **System Info**

Section

Created By <a href="#">Darlene Weber-Scott</a> , 8/21/2024 9:37 AM	MRES Rep <a href="#">Darlene Weber-Scott</a>
Incentive Authorized By	Utility <a href="#">Worthington Public Utilities</a>
Last Modified By <a href="#">eO Support</a> , 9/19/2024 1:51 PM	Utility Code WRTH
Locked <b>1</b> No	Program Code R-HVAC-24
Site Name <a href="#">Fred Rogers - 123 Elm St</a>	Parent Account
	Additional Incentive Override <b>1</b>
	Other Override Reason <b>1</b>

# Out with the Old – Projects/Applications Page

energyOrbit

Logged in as Vida Iten (viten@worthingtonutilities.com)

Vida Iten Setup Help & Training energyOrbit

Home Accounts **Projects / Applications** Contacts Programs Reports Files +

Bright Energy Solutions  
Saving energy. Saving money.

Messages and Alerts  
December is here! A new year is just around the corner. Happy Holidays from the Bright Energy Solutions team!

Search

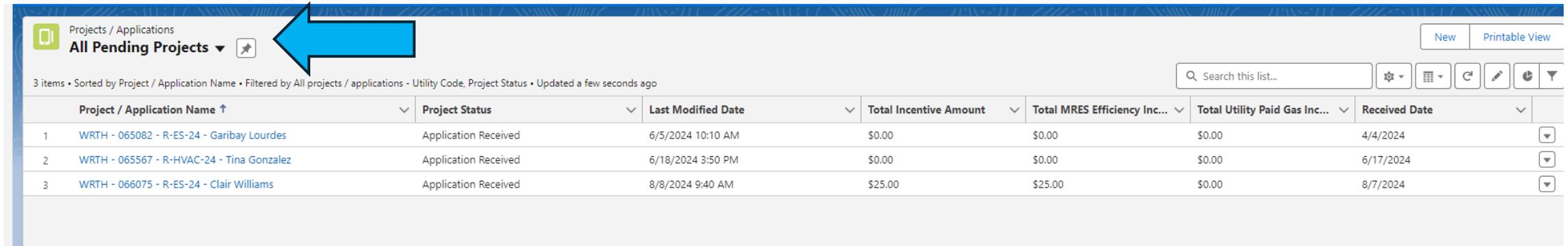
Paid or Paid Final Clone | Create New View

New Project / Application

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

Action	Utility Code ↑	Payment Date	Project / Application ...	Account	Included Measures D...	Total MRES Efficienc...	Total MRES Electric...	Total Utility Paid EE I...	Total Utility Paid Gas...
Edit   Del	WRTH	2/19/2019	WRTH - 048026 - LT...	Palma Auto	LED High Bay Fixtur...	\$420.00	\$0.00	\$44.02	\$0.00
Edit   Del	WRTH	2/19/2019	WRTH - 048039 - LT...	Nobles County	LED Pin-Based Repl...	\$144.00		\$0.00	\$0.00
Edit   Del	WRTH	12/27/2018	WRTH - 047392 - R...	Loren Metz	ENERGY STAR Deh...	\$50.00		\$0.00	\$0.00
Edit   Del	WRTH	1/15/2019	WRTH - 047517 - LT...	Pawn It	Custom - Lighting	\$709.29		\$0.00	\$0.00
Edit   Del	WRTH	1/15/2019	WRTH - 047543 - R...	Iva Barber	Furnace W/ECM	\$150.00		\$0.00	\$0.00
Edit   Del	WRTH	1/15/2019	WRTH - 047544 - R...	Jerry Vajgt	Smart Thermostat (N...	\$25.00		\$0.00	\$0.00
Edit   Del	WRTH	1/15/2019	WRTH - 047545 - R...	Jeff Buysman	ENERGY STAR Refr...	\$25.00		\$0.00	\$0.00
Edit   Del	WRTH	1/15/2019	WRTH - 047552 - R...	Brad Klassen	Lighting Equipment L...	\$72.00		\$0.00	\$0.00

# In with the New – Projects/Applications page



Projects / Applications

**All Pending Projects** 

3 items • Sorted by Project / Application Name • Filtered by All projects / applications - Utility Code, Project Status • Updated a few seconds ago

Search this list...      

	Project / Application Name ↑	Project Status	Last Modified Date	Total Incentive Amount	Total MRES Efficiency Inc...	Total Utility Paid Gas Inc...	Received Date	
1	<a href="#">WRTH - 065082 - R-ES-24 - Garibay Lourdes</a>	Application Received	6/5/2024 10:10 AM	\$0.00	\$0.00	\$0.00	4/4/2024	
2	<a href="#">WRTH - 065567 - R-HVAC-24 - Tina Gonzalez</a>	Application Received	6/18/2024 3:50 PM	\$0.00	\$0.00	\$0.00	6/17/2024	
3	<a href="#">WRTH - 066075 - R-ES-24 - Clair Williams</a>	Application Received	8/8/2024 9:40 AM	\$25.00	\$25.00	\$0.00	8/7/2024	

# Out with the Old – Contacts page

energyOrbit

Logged in as Vida Iten (viden@worldwidecontinues.com)

Home Accounts Projects / Applications **Contacts** Programs Reports Files +

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Contacts Home Tell me more! | Help for this Page

View:   [Clone](#) | [Create New View](#)

**Recent Contacts**

Name	Account Name	Mobile
<a href="#">Mixner, Angie</a>	<a href="#">Angie Mixner</a>	
<a href="#">Soria Luna, Leonor</a>	<a href="#">Leonor Soria Luna</a>	
<a href="#">Farley, Malia</a>	<a href="#">Malia Farley</a>	
<a href="#">Ahlquist, Todd</a>	<a href="#">Ahlquist &amp; Wilttrout Pc</a>	(507) 372-2322
<a href="#">Pomrenke, Glenden</a>	<a href="#">Glenden Pomrenke</a>	
<a href="#">Gonzalez, Benjamin</a>	<a href="#">Benjamin Gonzalez</a>	
<a href="#">Bramel, Terry</a>	<a href="#">Terry Bramel</a>	-
<a href="#">Sieve, Jason</a>	<a href="#">Jason Sieve</a>	-
<a href="#">Doyscher, Mary</a>	<a href="#">Mary Doyscher</a>	
<a href="#">Garcia, Dayan</a>	<a href="#">Dayan Garcia</a>	
<a href="#">Ostrem, Connie</a>	<a href="#">Connie Ostrem</a>	
<a href="#">Andersen, Deborah</a>	<a href="#">Deborah Andersen</a>	-
<a href="#">Miller, Josh</a>	<a href="#">Orion Energy Systems Chicago</a>	(224) 223-2428
<a href="#">Henning, Alfred</a>	<a href="#">Alfred Henning</a>	
<a href="#">Gonzalez, Tina</a>	<a href="#">Tina Gonzalez</a>	
<a href="#">Sieve, Darwin</a>	<a href="#">Darwin Sieve</a>	-
<a href="#">Soto Escalante, Selwin</a>	<a href="#">Selwin Soto Escalante</a>	
<a href="#">Sorto, David</a>	<a href="#">David Sorto</a>	
<a href="#">Engesser, Dennis</a>	<a href="#">Dennis Engesser</a>	
<a href="#">Bristow, Robert</a>	<a href="#">Robert Bristow</a>	

[Show 10 items](#)

**Reports**

- [HTML Email Status Report](#)
- [Partner Accounts](#)

**Tools**

- [Sync to Outlook](#)
- [View Mailbox](#)

Messages and Alerts  
December is here! A new year is just around the corner. Happy Holidays from the Bright Energy Solutions team!

Search  
   
[Advanced Search...](#)

Custom Links  
[BES Home Page](#)  
[BES Members Only Page](#)  
[MRES Home Page](#)  
[BES Calendar](#)

Recent Items  
[WRTH - 086133 - R-HVAC-24 - Donald & Patricia Bents](#)  
[Quality Installation - Central AC](#)  
[Quality Installation - Central AC](#)  
[Donald & Patricia Bents](#)  
[WRTH - 086131 - R-HVAC-24 - Douglas Brouwer](#)  
[Central AC/ASHP Tune-Up](#)  
[Central AC/ASHP Tune-Up](#)  
[Douglas Brouwer](#)

3:04 PM

# In with the New – Contacts Page

energyOrbit Home Accounts Projects / Applications **Contacts** Programs Reports Files Measures

Contacts  
**All Contacts**

Items • Sorted by Account: Account Record Type • Filtered by All contacts • Updated a few seconds ago

<input type="checkbox"/>	Account Name	Account: Account Nu...	Account: Install Street	Account: Install City	Account: Install Zip/P...	Account: Account Record Type	
<input type="checkbox"/>	ALP - Alexandria Light & Power		316 Fillmore	Alexandria	56308	5-Member Utility	
<input type="checkbox"/>	Alton Municipal Utilities		905 3rd Avenue	Alton	51003	5-Member Utility	
<input type="checkbox"/>	Barnesville Municipal Utilities		102 Front Street N	Barnesville	56514	5-Member Utility	
<input type="checkbox"/>	Benson Municipal Utilities		1410 Kansas Ave	Benson	56215	5-Member Utility	
<input type="checkbox"/>	Big Stone City Municipal Utilities		400 Washington St	Big Stone City	57216	5-Member Utility	
<input type="checkbox"/>	Breckenridge Public Utilities		420 Nebraska Ave	Breckenridge	56520	5-Member Utility	
<input type="checkbox"/>	Burke Municipal Utilities		7th & Main Streets	Burke	57523	5-Member Utility	
<input type="checkbox"/>	Cavalier Municipal Utilities		301 Division Ave N	Cavalier	58220	5-Member Utility	
<input type="checkbox"/>	Denison Municipal Utilities		721 W Broadway	Denison	51442	5-Member Utility	
<input type="checkbox"/>	Elbow Lake Municipal Power		118 N Central Ave	Elbow Lake	56531	5-Member Utility	
<input type="checkbox"/>	Faith Municipal Utilities		204 Main St	Faith	57626	5-Member Utility	
<input type="checkbox"/>	Flandreau Municipal Utilities		1005 W Elm Ave	Flandreau	57028	5-Member Utility	
<input type="checkbox"/>	Fort Pierre Municipal Utilities		8 E Second Ave	Fort Pierre	57532	5-Member Utility	
<input type="checkbox"/>	Hartley Municipal Utilities		11 S Central Ave	Hartley	51346	5-Member Utility	
<input type="checkbox"/>	Hawarden Municipal Utilities		1150 Central Ave	Hawarden	51023	5-Member Utility	
<input type="checkbox"/>	Henning Municipal Utilities		116 Poulson Ave	Henning	56551	5-Member Utility	
<input type="checkbox"/>	Hillsboro Municipal Utilities		19 S Main St	Hillsboro	58045	5-Member Utility	
<input type="checkbox"/>	Hutchinson Utilities Commission		225 Michigan St. SE	Hutchinson	55350	5-Member Utility	
<input type="checkbox"/>	Jackson Municipal Utilities		80 W Ashley Street	Jackson	56143	5-Member Utility	
<input type="checkbox"/>	Kimballton Municipal Utilities		116 N Main	Kimballton	51543	5-Member Utility	
<input type="checkbox"/>	Lake Park (IA) Municipal Utilities		217 Market St	Lake Park	51347	5-Member Utility	
<input type="checkbox"/>	Lake Park (MN) Public Utilities		401 Lake Street	Lake Park	56554	5-Member Utility	
<input type="checkbox"/>	Lakefield Public Utilities		301 Main Street	Lakefield	56150	5-Member Utility	
<input type="checkbox"/>	Lakota Municipal Utilities		108 B Ave E	Lakota	58344	5-Member Utility	
<input type="checkbox"/>	Luverne Municipal Utilities		305 E Luverne St	Luverne	56156	5-Member Utility	
<input type="checkbox"/>	Madison Municipal Utilities		404 6th Ave	Madison	56256	5-Member Utility	
<input type="checkbox"/>			166 6th Ave	Manilla	51454	5-Member Utility	

Filters

Filter by Owner  
All contacts

Add Filter Remove All

Email

3:49 PM 9/25/2024

# In with the New – Reports

energyOrbit Home Accounts Projects / Applications Contacts Programs Reports Files

Logged in as Vida Iten (viten@worthingtonutilities.com) Log out as Vida Iten

Search...

Reports

Recent

4 items

Search recent reports... New Report New Folder

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	YTD Total Incentives Paid V3 (For Chart)		Member Utility	Darlene Weber-Scott	7/15/2024, 12:06 PM	
Created by Me	YTD kWh Goals		Member Utility	Debbie Heishman	8/21/2017, 6:06 PM	
Private Reports	YTD kW Goals		Member Utility	Debbie Heishman	8/21/2017, 6:05 PM	
Public Reports	Current Projects		Public Reports	Debbie Heishman	5/15/2017, 7:34 PM	
All Reports						

FOLDERS

- All Folders
- Created by Me
- Shared with Me

FAVORITES

- All Favorites

# Files

The screenshot shows the 'Files' section of the energyOrbit application. The page title is 'Files' and the sub-section is 'Shared with Me', containing 8 items sorted by last modified date. A table lists the files with columns for Title, Owner, and Last Modified Date. A blue arrow points to the file '2008-09 MANUAL rebates - not in energyOrbit'.

Owned by Me	Title	Owner	Last Modified Date ↓
Shared with Me	energyOrbit Admin Guide MRES_Final	Debbie Heishman	3/20/2023 9:08 AM
Recent	Setting Up Multi-Factor Authentication- MRES	Kurt Hauser	3/17/2023 10:57 AM
Libraries	AHRI Update Process 2021-0701	Kurt Hauser	7/1/2021 1:43 PM
	Preapproval_Inspection Grid 2020-0403	Shannon Murfield	4/6/2020 3:38 PM
	Preapprovals_Exceptions_Caps	Shannon Murfield	4/6/2020 3:08 PM
	2008-09 MANUAL rebates - not in energyOrbit	Lisa Fischer	12/30/2019 3:39 PM
	energyOrbit Training MRES	Debbie Heishman	9/9/2019 10:06 AM
	MRES Security	Debbie Heishman	8/10/2017 2:17 PM

## **QUICK LINKS:**

**[BES Home Page](#)**

**[MRES Members Only Page](#)**

**[MRES Home Page](#)**

**[EnergyStar Page](#)**



# Demo

Let's look at a live version.





# Questions?

- Darlene Weber-Scott
- 605-770-2747
- [Darlene.weber-scott@mrenergy.com](mailto:Darlene.weber-scott@mrenergy.com)

**Thank you**