

## Trinity Solar Referral Portal

We are looking for a very simple phone app that will allow users to track their referrals. The sections/ things We need in the app are as follows:

1. Form to Submit new Referrals
2. A very visual easy to read dashboard/ graph to show total Paid vs total potential(outstanding)
3. Simple Visual to show total paid
4. List of all referrals submitted and their status
5. Total number of referrals submitted and what Tier they fall into and what is the next tier (how close)

The App should be a minimal clean design that the user can navigate easily without much direction given.

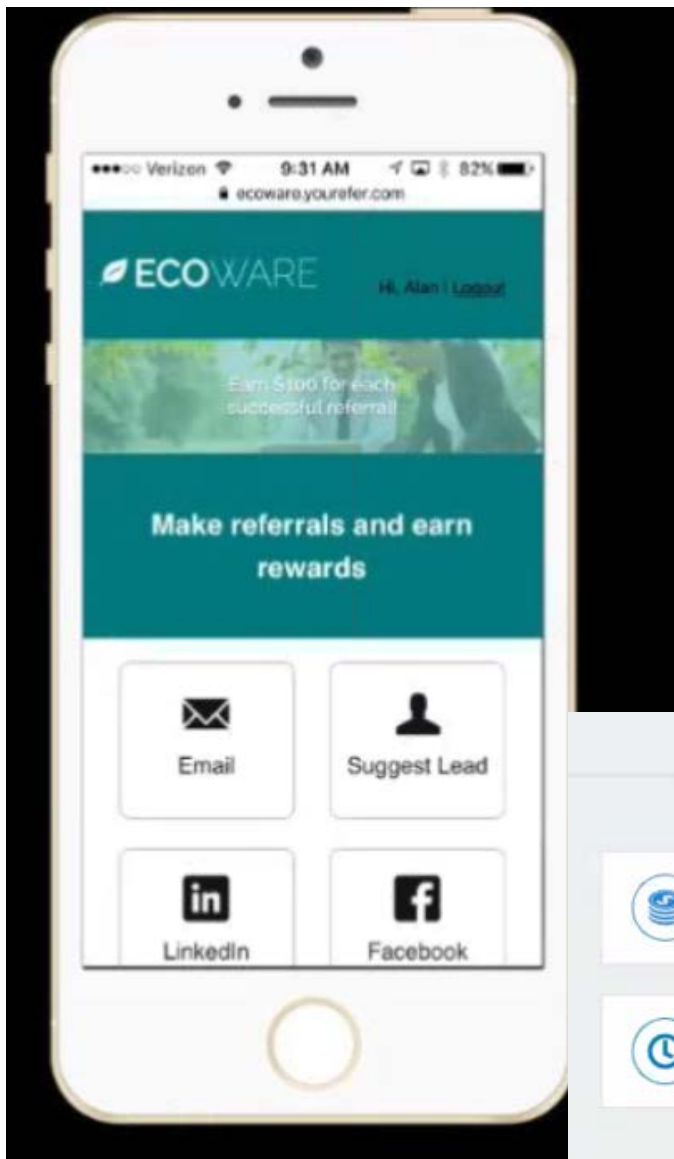
This app should only be designed for the mobile experience. This is meant to gamify and simplify the process for the user To add more referrals and get more payments. Adding something fun with the Sun would be great!



We really like this design that easily shows the user what their current Tier Level is, what their overall earning is, how many they need for the Next tier. Easy quick dashboard that is visually fun and pleasing for user.

We Like the idea of the Tabs for:

- My Referrals
- Trinity Wallet



Accepted	Successful	Earned
4	3	\$300.00

#### My Referrals

Name	Referred	Updated	Status
Laura Lemonson	11/17/2016	11/28/2016	Qualified by Brand
Skyler Anderson	11/17/2016	11/17/2016	Suggested Lead
Ted Trevor	11/17/2016	11/28/2016	Successful
Rodney Stoker	11/17/2016	12/12/2016	Successful
Paula Prospect	11/29/2016	11/29/2016	Suggested Lead
Pamela Prospect	12/13/2016	12/16/2016	Successful

#### My Rewards


Referral	Amount	Updated	Status
Ted Trevor	\$100.00	11/28/2016	Complete
Rodney Stoker	\$100.00	12/12/2016	Complete
Pamela Prospect	\$100.00	12/16/2016	Complete

Campaign URL

<http://mbssy.co/cnJZq>


Sunrun Employees

I




Referral Submitted

\$350.00




Referral Pending

\$350.00



Referral Approved

\$0.00



Referral Paid

\$0.00

# Samples Only (Other Portals)

Accepted	Successful	Earned
4	3	\$300.00

#### My Referrals

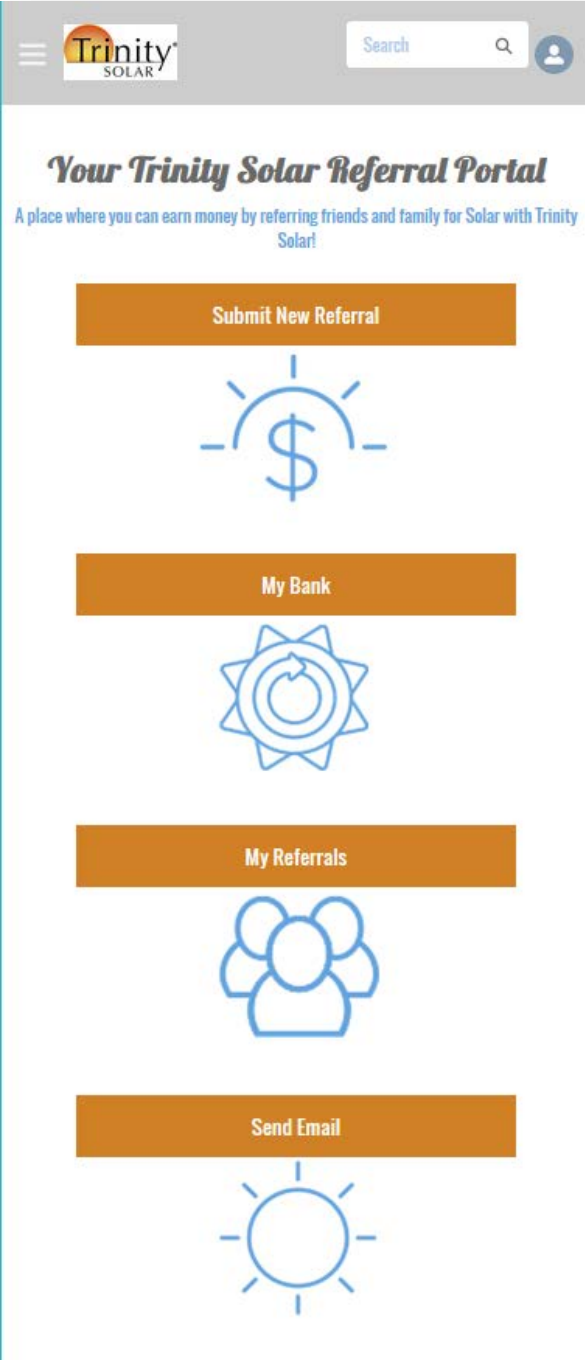
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Skyler Anderson	11/17/2016	11/17/2016	Suggested Lead
Ted Trevor	11/17/2016	11/28/2016	Successful
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This is essentially all the data that is needed to be seen by the user, would like to use Trinity Wallet instead of Rewards. I like the icons But this is from another portal so they would need to change to the ones possibly The blue ones listed on the current page/website

This is what the current app Looks like. No need for a search bar, there are limitations Of how it is currently built. Looking to redo the design to Fit better on a phone. The submit page is all the fields that Are required. The icons come From our current website and can be used/altered for this Project.



Submit Referral

First Name ⓘ

Last Name ⓘ

Email ⓘ

Phone ⓘ

Street ⓘ

City ⓘ

State

-None-

ZIP Code ⓘ

This is our current website and Submission form for employee Referrals, Font used is Gotham So that what needs to be used on The app.

[WHY TRINITY](#)[RESIDENTIAL](#)[BUSINESSES](#)[STEWARDSHIP](#)[1-800-FREE-SOLAR](#)[FREE QUOTE](#)

Welcome to the Trinity Solar Employee Referral Program Page  
Enter the information of the friend or relative you would like to refer:

Employee Referral Number:

**VERIFY EMPLOYEE NUMBER**

Where Do I Find My Employee Referral Number?

**SUBMIT YOUR REFERRAL**

Limited time offer, which Trinity Heating & Air, Inc. DBA Trinity Solar may elect to extend in its sole discretion. The following conditions must be satisfied for a referrer to qualify for a \$200.00 appointment referral fee: (1) the referrer must properly submit the referral's information using the online form provided by Trinity Solar, (2) the referral must own the home in which the appointment is completed, (3) at the time the referrer submits the referral to Trinity Solar, the referral must have previously been in contact with the referrer but not Trinity Solar. (4) the referral must have asked that Trinity Solar contact

Current breakdown of Referral Payment Tiers:

Silver - \$500 for every referral up to 3

Gold - \$700 for every referral from 4-7

Platinum - \$1,000 for the 8<sup>th</sup> and above referrals



Maybe something like a sun or dial to show what tier the user is currently in and how far they are to the next one.