

Gridz

Who is involved in the decision making process and what does their decision making process look like?

Example: Our main contact, John, is in charge of all energy expenditures for the company. He will present our report to his Board of Directors who will make the final decision.

What is the customer trying to achieve? What is an impactful savings or offset %?

Example: They are interested in saving money on their electricity costs, particularly demand charges. They currently pay an average of \$5,000/month for demand and are only interested in projects that reduce this amount by 25% or more.

What would be an attractive project for this customer and is there a budget in place?

Example: They are only considering projects with an ROI of less than 10 years. Their building improvement budget for this year has already been allocated. They are currently making decisions for next year's budget.

Who are the competitors the customer is looking at?

Example: The customer has spoken to three local solar installers but has turned them down because they did not offer demand reduction or battery storage.

Your Information

Company Name: _____ Contact Name: _____

Project Information

Project Name: _____ Budget: _____

Address: _____ Estimated Installation Date: _____

City, State, Zip: _____

Application: Full Back-up Partial Back-Up Off-Grid Demand Reduction (Please Provide 15 min. Interval Data and 12 months of Bills)

Grid Available: Yes No

Backup Generator: Yes No Generator Size: _____ kW

Service Voltage: 240V Split-Phase (Typical Residential)

208V / 3 Ø

480V / 3 Ø

Energy Consumption

Avg. Daily Energy Consumption: _____ kWh Peak Daily Power: _____ kW

Daily Storage Requirement _____ kWh Length of Back-up: _____ Days

Existing Renewables

PV Solar: Yes No Quantity of Panels: _____

Grid Tied: Yes No Wattage of Panels: _____ W

 Total System Wattage: _____ kW

Additional Information/ Notes

Please describe the loads you plan to back-up (ex. 10 lights at 60W each, 1 refrigerator at 800W, etc.)

If possible, please provide the following:

- Pictures of both the building and installation site 12 months of electricity bills



Zefr

Who is involved in the decision making process and what does their decision making process look like?

Example: The homeowner, John, is the sole decision maker. He wants to compare quotes from different companies to make sure he is getting the best deal. He is prepared to make a purchase by the end of the month.

What is the customer trying to achieve? What is an impactful savings or offset %?

Example: The customer is seeking a hybrid wind and PV solar system that will produce as close to a 100% offset as possible year-round.

What would be an attractive project for this customer and is there a budget in place?

Example: A system that is aesthetically pleasing is a major requirement. Also, only systems that produce significant electricity during the winter will be considered because the home is all electric. The budget is \$25,000 total installed cost before incentives.

Who are the competitors the customer is looking at?

Example: The customer is comparing our quote to systems with solar PV only. We are the only company offering a hybrid system with wind.



Project Data Sheet:
Zefr Micro Wind Turbine Systems

Your Information

Company Name: _____ Contact Name: _____

Project Information

Project Name: _____ Budget: _____

Address: _____ Estimated Installation Date: _____

City, State, Zip: _____

Building Specifications

Building Height: _____

Mounting Type: Parapet Rails Other: _____

System Specifications

of Turbines: _____ -or- Desired Production: _____ kWh/Year

Project Goals

If possible, please provide the following:

- Pictures of both the building and installation site 12 months of electricity bills



Solarz

Who is involved in the decision making process and what does their decision making process look like?

Example: The homeowner, John, is the sole decision maker. He wants to compare quotes from different companies to make sure he is getting the best deal. He is prepared to make a purchase by the end of the month.

What is the customer trying to achieve? What is an impactful savings or offset %?

Example: The customer is seeking a PV solar system that will offset around 60% of their total annual energy use.

What would be an attractive project for this customer and is there a budget in place?

Example: The budget is \$25,000 total installed cost before incentives and they would like the ROI to be less than 7 years.

Who are the competitors the customer is looking at?

Example: The customer is comparing our quote to two other solar PV proposals. They are also interested in JLM's wind products and battery storage solutions.



Project Data Sheet:
Solarz Commercial Grade Hybrid PV

Your Information

Company Name: _____

Contact Name: _____

Project Information

Project Name: _____

Budget: _____

Address: _____

Estimated Installation Date: _____

City, State, Zip: _____

System Specifications

System Size: _____ kW

Desired Annual Production: _____ kWh

PV Module Type: Made in U.S.A. Non U.S.A

Inverter Type: String Micro Other: _____

Mounting Type: Roof Ballast Ground

Panel Orientation: Portrait Landscape

Tilt Kit Required? Yes No Tilt: _____ Degrees

Building Specifications

Area of Installation: _____ Sq.Ft.

Azimuth: _____ Degrees

Roof Slope: _____ Degrees

Additional Information/Notes

If possible, please provide the following:

Pictures of both the building and installation site

12 months of electricity bills



Gyezr

Who is involved in the decision making process and what does their decision making process look like?

Example: Our main contact, John, is in charge of all energy expenditures for the company. He will present our report to his Board of Directors who will make the final decision.

What is the customer trying to achieve? What is an impactful savings or offset %?

Example: They are interested in saving money on their monthly propane costs related to heating water. They currently pay an average of \$5,000/month for propane and are only interested in projects that reduce this amount by 25% or more.

What would be an attractive project for this customer and is there a budget in place?

Example: They are only considering projects with an ROI of less than 10 years. Their building improvement budget for this year has already been allocated. They are currently making decisions for next year's budget.

Who are the competitors the customer is looking at?

Example: The customer has not contacted any competitive companies. This lead was generated by our call center.



Project Data Sheet: Commercial Solar Hot Water Systems

Your Information

Company Name: _____

Contact Name: _____

Project Information

Project Name: _____

Budget: _____

Address: _____

Estimated Installation Date: _____

City, State, Zip: _____

Building Specifications

Installation Area: _____ sq.ft.

Azimuth: _____ Degrees

Roof Tilt: _____ Degrees

System Specifications

*Gallons/Day Hot Water: _____ Gal

*If your desired Gallons/Day Hot Water is unknown, please complete the attached 'Gyezr Water Usage Questionnaire'

Temperature Setting: _____ °F

or _____ °C

Project Goals

If possible, please provide the following:

Pictures of both the building and installation site

12 months of energy bills related to hot water heating





Water Usage Questionnaire

Commercial Solar Hot Water Systems

Instructions

In order to provide a more accurate system design, please answer any of the following questions that apply to your project. Information regarding water temperature settings can be found on or near your hot water storage tank(s).

Usage Statistics

Laundry Services

How many washers? _____

Total loads per day? _____

How many pounds per load? _____ lbs

Make and model #? _____

Total volume of hot water tanks? _____ Gal

Temperature setting? _____ °F -or- _____ °C

Restaurant

How many meals served per day? _____

How many gallons per load? _____

How many loads of dishes? _____

Total volume of hot water tanks? _____ Gal

Temperature setting? _____ °F -or- _____ °C

Hotel

How many units? _____

Occupancy rate? _____

Total volume of hot water tanks? _____ Gal

Temperature setting? _____ °F -or- _____ °C

Project Notes





Water Usage Questionnaire (Swimming Pool)

Commercial Solar Hot Water Systems

Instructions

The following document is intended for the specific application of heating water for swimming pools. In order to ensure a more accurate calculation please fill out all of the fields as indicated.

Project Details

Location of Pool: Indoor Outdoor

Temperature Setting: _____ °F or _____ °C

Heating Rate: _____ °F/Day or _____ °C/Day

Surface Area: _____ Sq. Ft.

Volume: _____ Gallons

Months of Operation:

<input type="checkbox"/> Jan	<input type="checkbox"/> Jul
<input type="checkbox"/> Feb	<input type="checkbox"/> Aug
<input type="checkbox"/> Mar	<input type="checkbox"/> Sep
<input type="checkbox"/> Apr	<input type="checkbox"/> Oct
<input type="checkbox"/> May	<input type="checkbox"/> Nov
<input type="checkbox"/> Jun	<input type="checkbox"/> Dec

Additional Information/Notes



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