

Trade Pro Portal User Guide

Technology Services

This guide is here to help you get the most out of the Trade Pro Portal. It provides an overview of key features along with step-by-step instructions to improve your experience and efficiency.

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1. Introduction

Welcome to the Trade Pro Portal

The Trade Pro Portal helps you simplify job management and tracking. You can search for jobs and monitor their progress using categories like: New, In Progress, and Complete, keeping you organized and connected with your Willdan Program Team.

Key features include claiming job sites, managing documents, viewing photos captured with the Photo Capture mobile app, uploading videos and documents to Box, messaging in real-time with your Willdan Program Team, and customizing your view for jobs you've claimed or been assigned. You can also track job timelines and receive email notifications for important updates.

2. Logging In

In order to access the Trade Pro Portal, you must first have a Willdan login account. If you already have one, proceed to Step 2.2. If you do not have an account, please contact your Willdan Program Team representative for assistance.

2.1 - Confirming Your Willdan-assigned Login

You can verify that your login works by visiting: <https://willdan.okta.com>.

If you need help setting up your Two-Factor Authentication (2FA), click [here](#) for step-by-step instructions.

2.2 - Accessing the Trade Pro Portal

After successfully verifying that your Willdan-issued login works, proceed with the following steps:

1. Open your preferred browser.
2. Go to: <https://sce.portal.willdan.io>.
3. Log in using your Willdan-issued credentials:

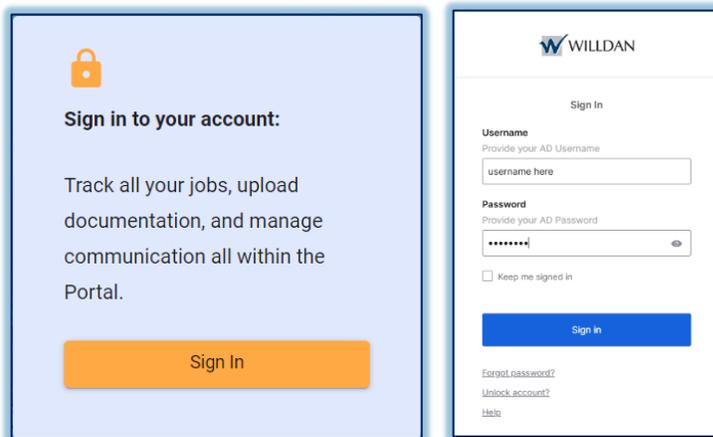


Figure 1 – Trade Pro Portal & Willdan Sign In

Complete your login process by following any additional prompts, such as Two-Factor Authentication.

3. Default Application List View

Upon logging in, you'll see the default **Application List** view. It's divided into four sections for easy access to all your job details.

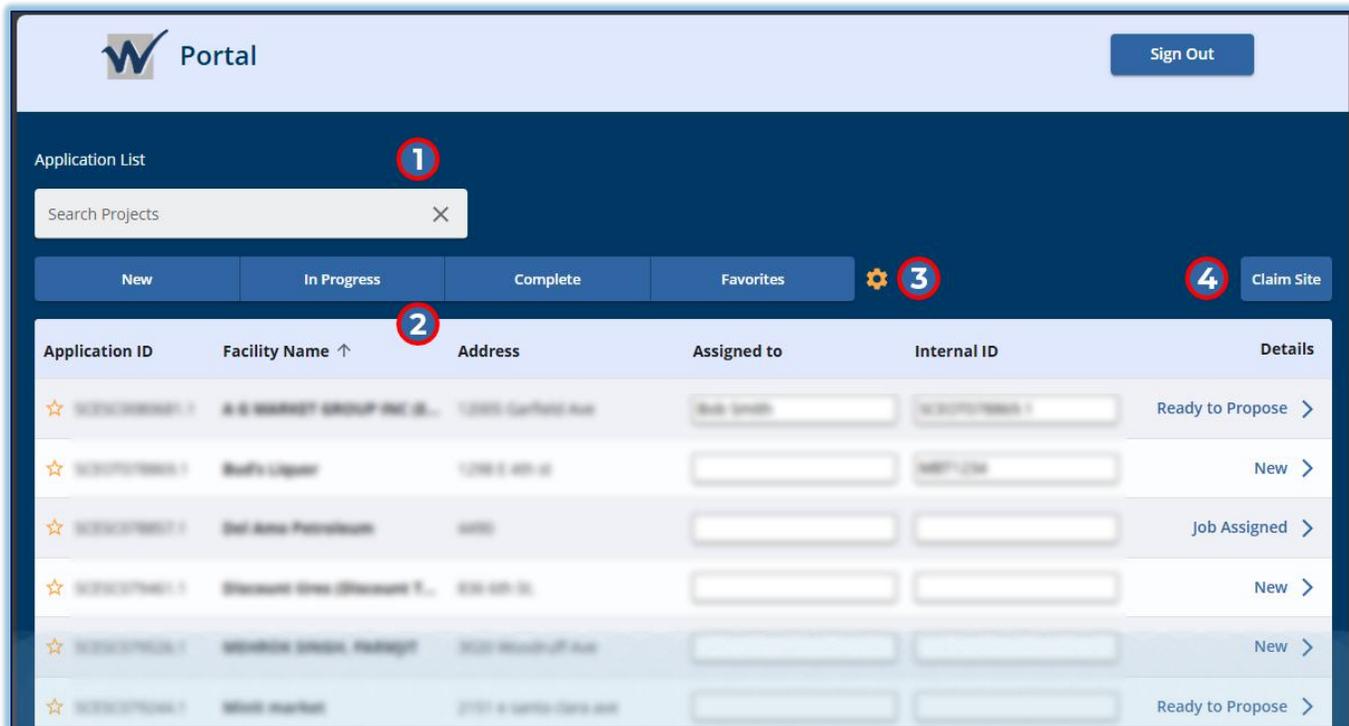


Figure 2 – Trade Pro Portal Default Screen – Four Sections of the Application List View

3.1 – Portal Search

The search feature is based on a simple search functionality. You can search by Category, Job Status, Facility Name, Address, Assigned To, and more.

Simple search helps you find jobs by typing in words or phrases. Key points to keep in mind when searching the Portal:

- Exact spelling is required for full matches.
- Partial names or abbreviations (e.g., "W." for "West") can be used to find relevant results.
- Misspellings or variations that do not match exactly will not return results.

3.1.1 – Examples of Using Search

Search All

If you enter your search criteria without selecting any of the categories (New, In Progress, Complete, or Favorites), the Application List view will display results from all categories that match your search. For example, "JG Pizza" shows 10 results in this case.

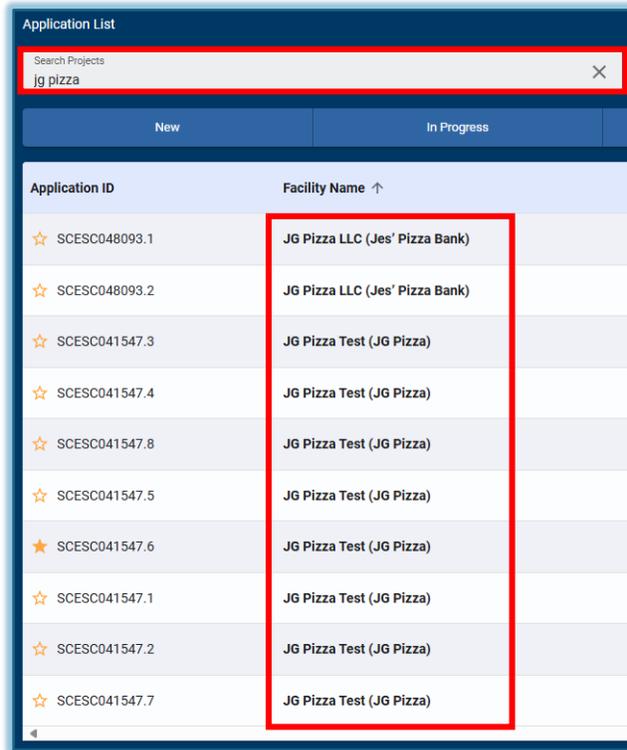


Figure 3 – Portal Search Feature - Search All

Search by Category

Narrow your search by selecting a category first (e.g., "New" in this example) and searching for "JG Pizza," which returns two results within the selected category.

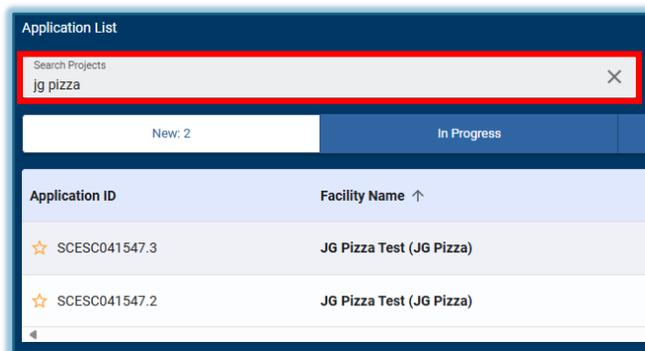


Figure 4 – Portal Search Feature - Search by Category

Similarly, you can select any one of the other job categories such as: In Progress, Complete, and Favorites. Additionally, you can search by job status, including: Job Assigned, Ready to Propose, Sold, Installation Scheduled, Pending Install, Installation Complete, and Closed.

Additional Search Criteria - Application ID and Facility Name

Application ID:

Willdan-assigned alphanumeric identifier for your jobs.

Search Criteria: Enter the alphanumeric value provided to you by the Willdan Program Team.

Facility Name

Name of Business.

Search Criteria: Enter the Doing Business As (DBA) name of the end customer.

Clearing the Search input box

Enter any of the above search criteria, and results will be displayed in the Application List view in real time. To clear the search, click on the 'X'.

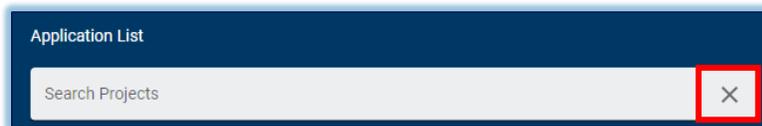


Figure 5 – Application List View - Search Jobs

3.2 – Job Categories and Favorites

Use the category tabs to filter the Application List by job progress, such as New, In Progress, Complete, or your marked favorites. When you select a category and perform a search, only items from that category will appear. To return to the full Application List view, simply click the selected category again.



Figure 6 – Application List View - Job Categories – New, In Progress, Complete & Favorites

3.2.1 - New

This category includes all jobs that are assigned to your team.

3.2.2 - In Progress

Consists of jobs with the following statuses:

- Job Assigned
- Ready to Propose, Sold, Installation Scheduled, or Pending Install.

3.2.3 - Complete

Lists jobs marked as Installation Complete or Closed.

3.2.4 - Favorites

Mark any job as a favorite by clicking the gold star icon, which will organize it in the Favorites section.

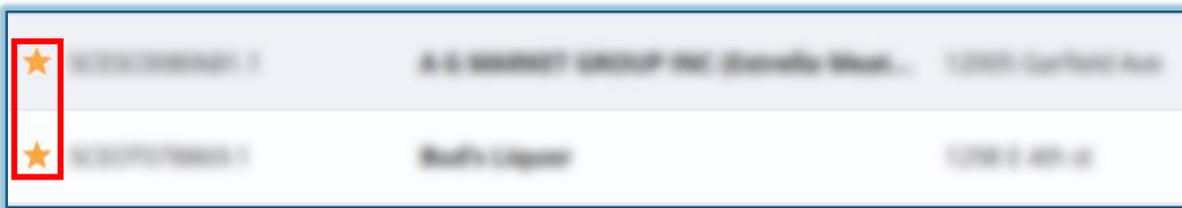


Figure 7 – Application List View – Job Categories – Favorites Icon

3.3 – Filter View

To show or hide information in the Application List view, click the gear icon and check or uncheck the boxes under the filters.

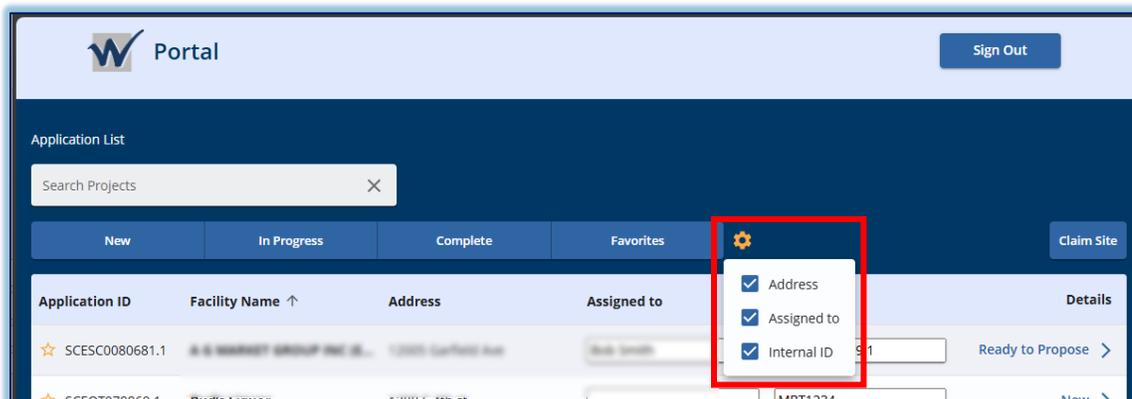


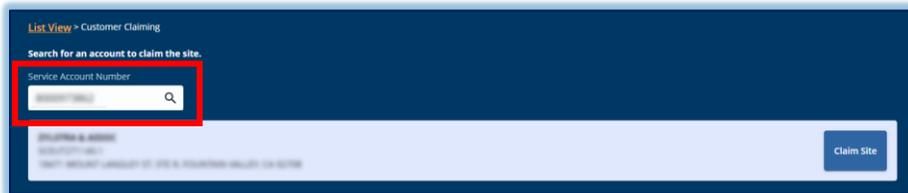
Figure 8 – Application List View – Filter View

Available viewing filters:

- **Method 1** - Manual Claiming
- **Method 2** – Request Site Reassignment
- **Method 3** – Request to Add Site

3.4.1 - Method 1 – Manual Claiming

1. Enter the **Service Account Number** and click the (magnifying glass) **Search** icon.



The screenshot shows a web interface titled "List View > Customer Claiming". Below the title is the instruction "Search for an account to claim the site." There is a search bar labeled "Service Account Number" with a magnifying glass icon. A red box highlights this search bar. To the right of the search bar is a "Claim Site" button. Below the search bar, there is a section for "Details & address" with some partially visible text.

Figure 11 – Claim Site – Method 1 – Manual Claiming – Service Account Number entry

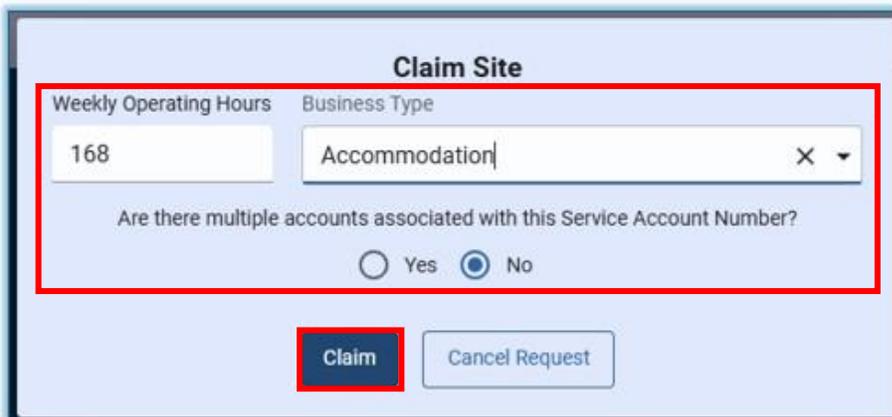
2. Review the details, then click **Claim Site** to proceed.



This screenshot is similar to Figure 11, showing the same search interface. However, the "Claim Site" button on the right side of the form is now highlighted with a red box, indicating it is the next step in the process.

Figure 12 – Claim Site – Method 1 - Claim Site after entering Service Account Number

3. Enter the **Weekly Operating Hours** (typically 168 for HPWH) and select the appropriate **Business Type** from the dropdown menu & specify whether multiple sites associated with the Service Account Number and click the **Claim** button.



The screenshot shows a form titled "Claim Site". It has two input fields: "Weekly Operating Hours" with the value "168" and "Business Type" with the value "Accommodation" and a dropdown arrow. Below these fields is a question: "Are there multiple accounts associated with this Service Account Number?" with radio buttons for "Yes" and "No", where "No" is selected. At the bottom of the form are two buttons: "Claim" (highlighted with a red box) and "Cancel Request".

Figure 13 – Claim Site – Method 1 – Weekly Operating Hours & Business Type

3.4.2 - Method 2 – Request Site Reassignment

1. Enter the customer's **Service Account Number** and click the **Search** icon.

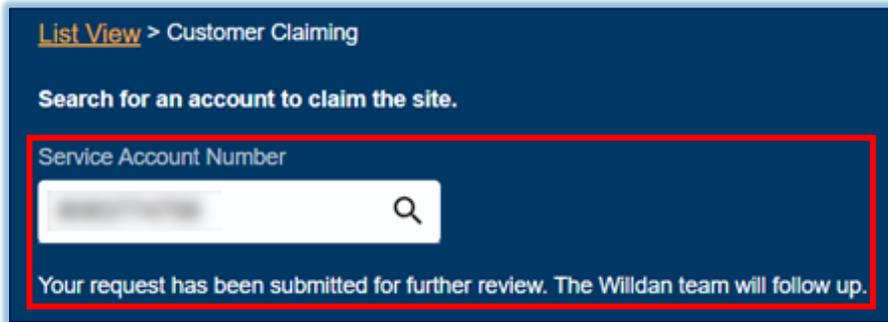


Figure 14 – Claim Site – Method 2 – Request Site Reassignment

If the Service Account Number is already assigned to another Trade Pro, your request will be submitted for review. The Willdan Program Team will assess the request and notify you of their decision.

3.4.3 - Method 3 – Request to Add Site

1. If the Service Account Number is not found, click on Request to Add Site to initiate a request for site addition and assignment.

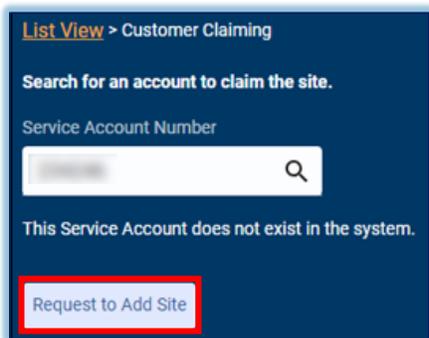


Figure 15 – Claim Site – Method 3 – Request to Add Site

2. Provide the relevant details for verification and click the **Request** button

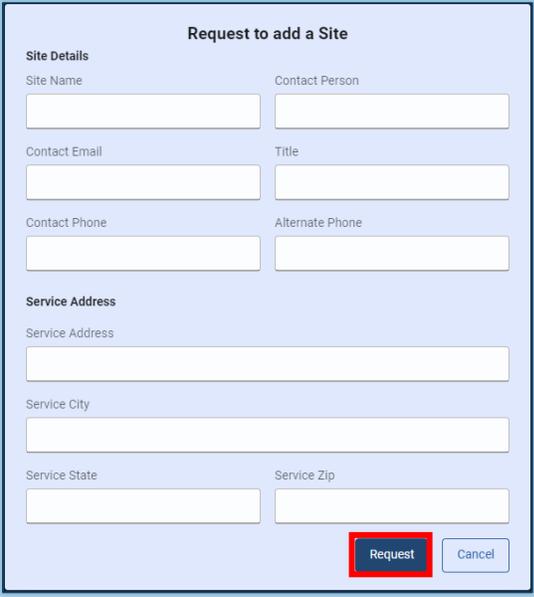
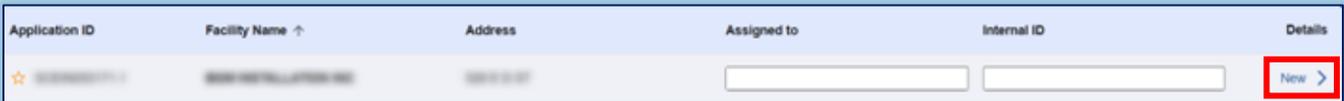


Figure 16 – Claim Site – Method 3 – Request to Add Site – Provide Relevant Details

4. Tracking & Managing Jobs

In the Application List view select a specific job (e.g., New job), click the arrow on the far right of the job record.



Application ID	Facility Name ↑	Address	Assigned to	Internal ID	Details
★ [Application ID]	[Facility Name]	[Address]	[Assigned to]	[Internal ID]	New >

Figure 17 – Trade Pro Portal – Application List (Main Screen) with right arrow to load the Job screen

This takes you to the Job detail screen, where you can access all relevant details, including photos, documents, and status updates, to help streamline the job workflow. All jobs are organized into 9 sections, as outlined below:

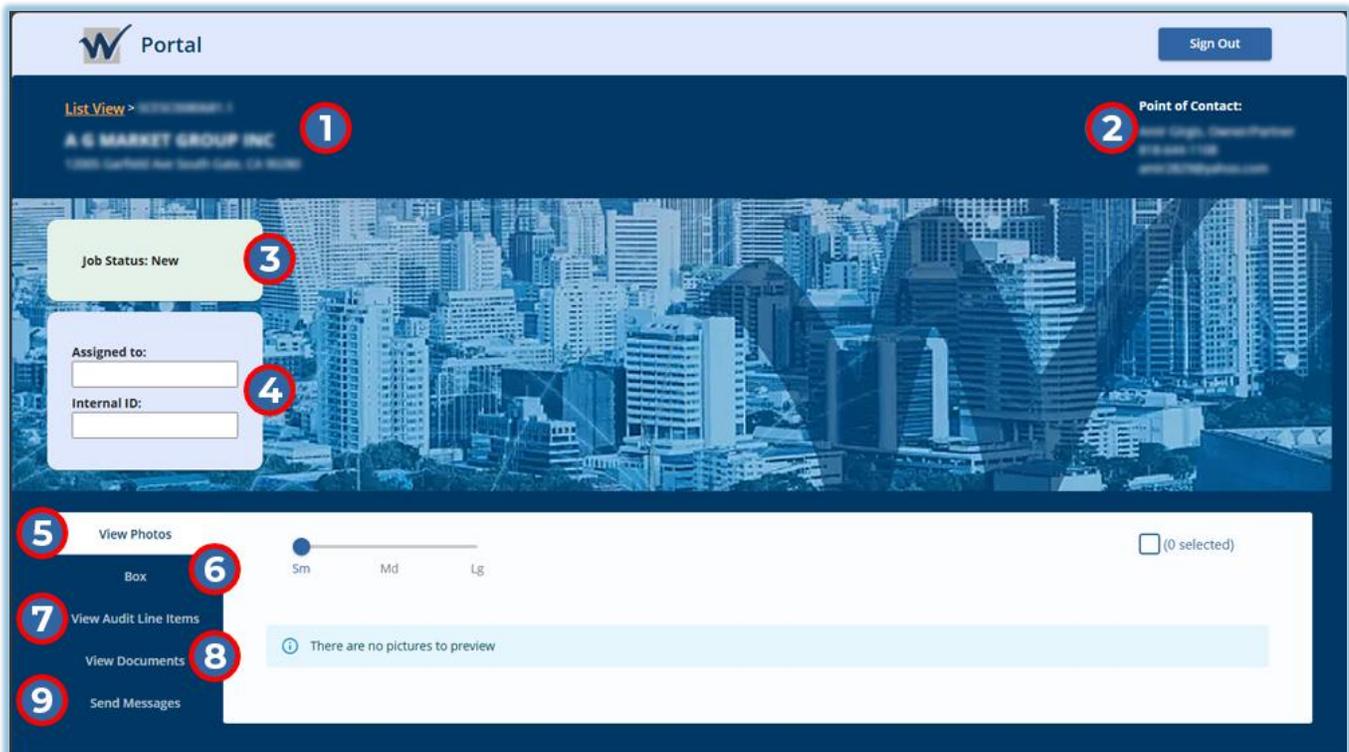


Figure 18 – Job View screen

4.1 - Customer name (DBA) & Address

Once the Job detail screen loads, the header will display the customer’s name (DBA) along with the address.

4.2 – Point of Contact

The Point of Contact section displays essential contact details, including the person's name, phone number, and email address.

4.3 – Jobs Status

Along with the primary job categories (New, In Progress, and Complete) outlined in section 3.2, there are several job status types that are determined by specific actions taken during the workflow of a job phase. These statuses help in organizing jobs according to their current phase.

The job status automatically updates from one stage to the next based on specific actions or data that was entered. Each status change is triggered by a defined action, allowing for clear tracking of job progress. There are six job statuses, as outlined below.

4.3.1 – “In Progress” Job Status Types

- **Job Assigned** – Once the Assigned To field is populated, the next step is to submit the Unsigned Proposal
- **Pending Install** – Notifying the team that the installation has been scheduled.
- **Ready to Propose** – Proposal and other documents have been reviewed. Willdan Engineer updates job status to Ready to Propose. Next step is to get the customer signature on the proposal.
- **Sold** – Trade Pro uploads the signed Proposal. Next step is to enter a date in the Installation Scheduled field.

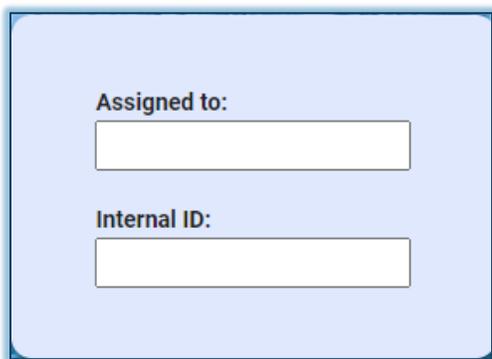
4.3.2 – “Complete” Job Status Types

- **Closed** – Once the Assigned To field is populated, the next step is the Unsigned Proposal.
- **Installation Complete** – Once all required documents and photos are received and approved by the Utility, the Willdan Program Team The considers the job as Closed.

4.4 – Assigned To & Internal ID Fields

The **Assigned to** field shows which team member a job has been assigned to. By entering a name in this field, you can assign the job to yourself or another team member. Doing so also updates the job status from **New** to **Job Assigned**.

If your team uses a tracking system, spreadsheet, or similar tool, you can enter the (alpha-numeric) identifier in the **Internal ID** field to cross-reference it to your system.



The image shows a light blue rectangular box containing two input fields. The first field is labeled "Assigned to:" and is empty. The second field is labeled "Internal ID:" and is also empty.

Figure 19 – Assigned To & Internal ID

After entering a name (and optionally an internal ID), a notification appears, confirming the successful update.

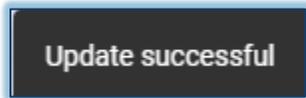


Figure 20 – Update successful confirmation

4.5 – View Photos

The **View Photos** section lets users access and download both pre/post installation photos captured in the field via the Photo Capture mobile app, and is organized as follows:

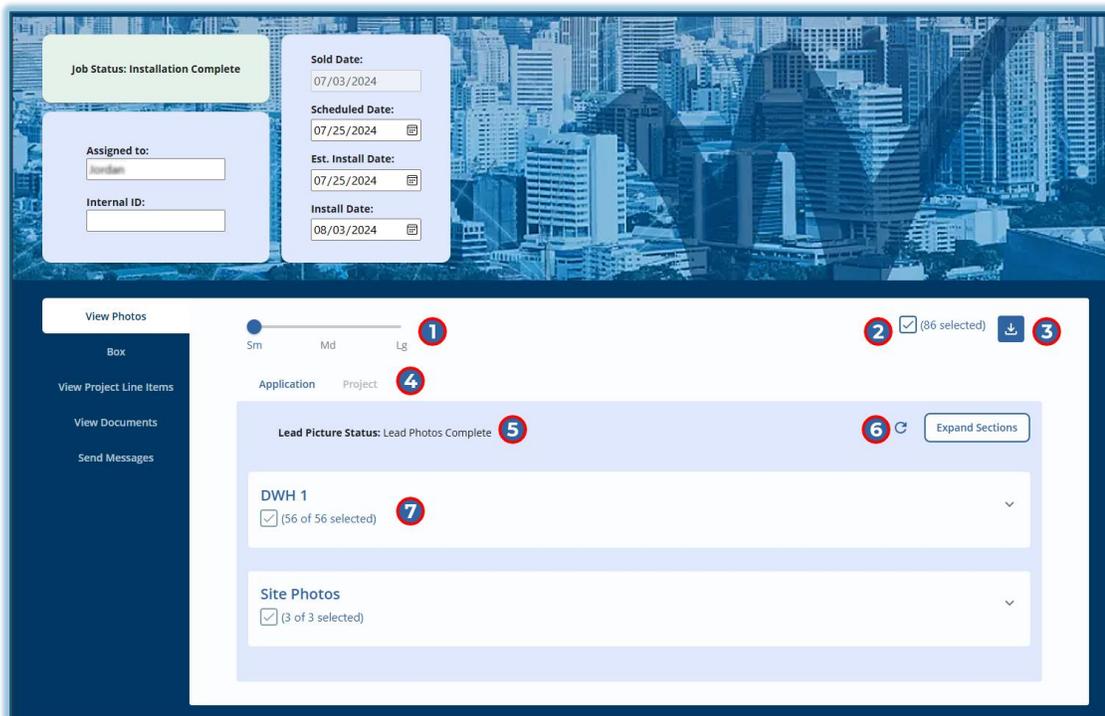


Figure 21 – View Photos Section

4.5.1 – Thumbnail Size

Slide the control for viewing small, medium or large sized thumbnails.

4.5.2 – Checkbox Selection

Allows you to select all photos.

4.5.3 – Download Photos

Download all or selected photos.

4.5.4 – Switch Between Application or Project Photos

Once a new job is converted to a Project, both Application and Project photos become accessible. Click the respective links to switch between them.

4.5.5 – Photo Status

Shows status of photos, for example, Lead Photos Complete.

4.5.6 – Expand Sections

Clicking expands the photo gallery, displaying all thumbnails for all sections.

4.5.7 – Section Selection Checkbox

Select sections such as DWH 1, Site Photos, and others when you only want to download a specific section.

4.6 – Box Integration

When accessing Box in the Portal, simply use the Box Cloud Slider – drag the white cloud onto the dark cloud. Or using the keyboard: press the spacebar to grab the cloud, arrow keys to move and spacebar to drop. Optionally, if you have a Box account, you can also authenticate using it.

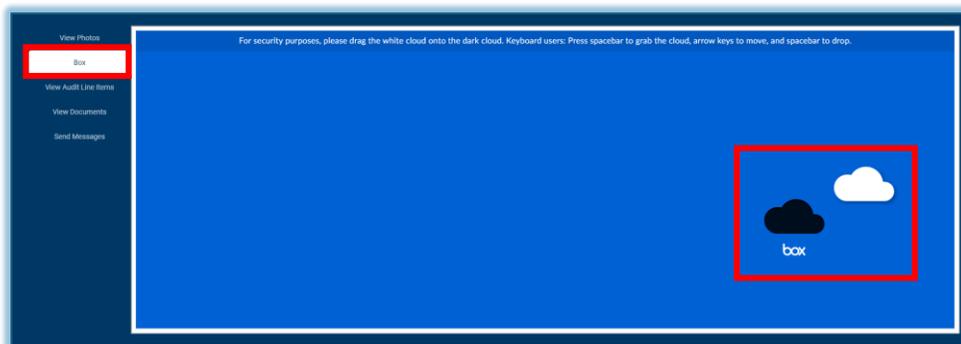


Figure 22 – Box Integration – Box Cloud Slider

Here, you can view and download various files that have been uploaded to Box.



Figure 23 – Box Integration – View and Download Files

4.7 – Viewing Audit and Project Line Items

Audit Line Items: In the Audit Line Items section, we can see all line items that have been added in the audit stage as well as the quantity, height and any specifications associated with the line items. This provides insight into the measures that have been **Proposed** to the customer, but not yet sold.



Figure 24 – View Audit Line Items

Project Line Items: The Project Line Items section displays all sold line items along with their quantity, height, and associated specifications. This offers insight into the measures sold and verified for installation.



Figure 25 – View Project Line Items

4.8 – View Documents

Upload, view, and download relevant documents. Document types vary depending on whether the application is in the Audit or Project stage.

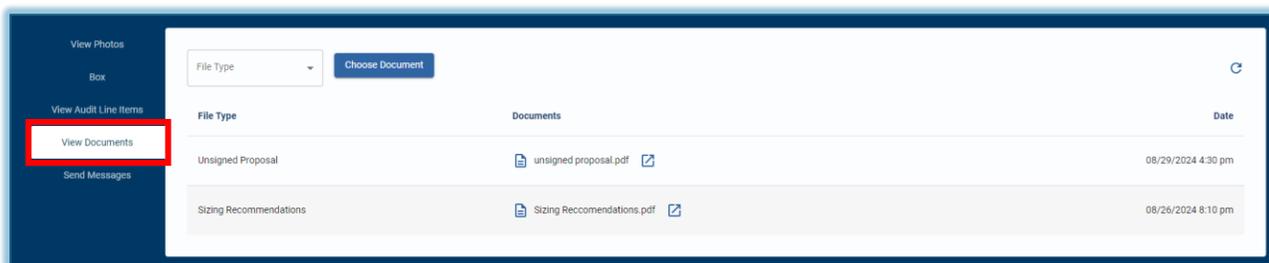


Figure 26 – View Documents

To upload a document the user would select a file type and then select the file they would like to upload and click **Choose Document**.

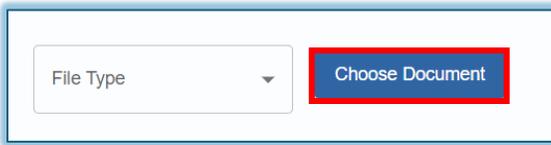


Figure 27 – View Documents – Choose Document

Document file types vary depending on whether the application is in the Audit or Project stage. For example, when the application is an **Audit**, the following document types are available:

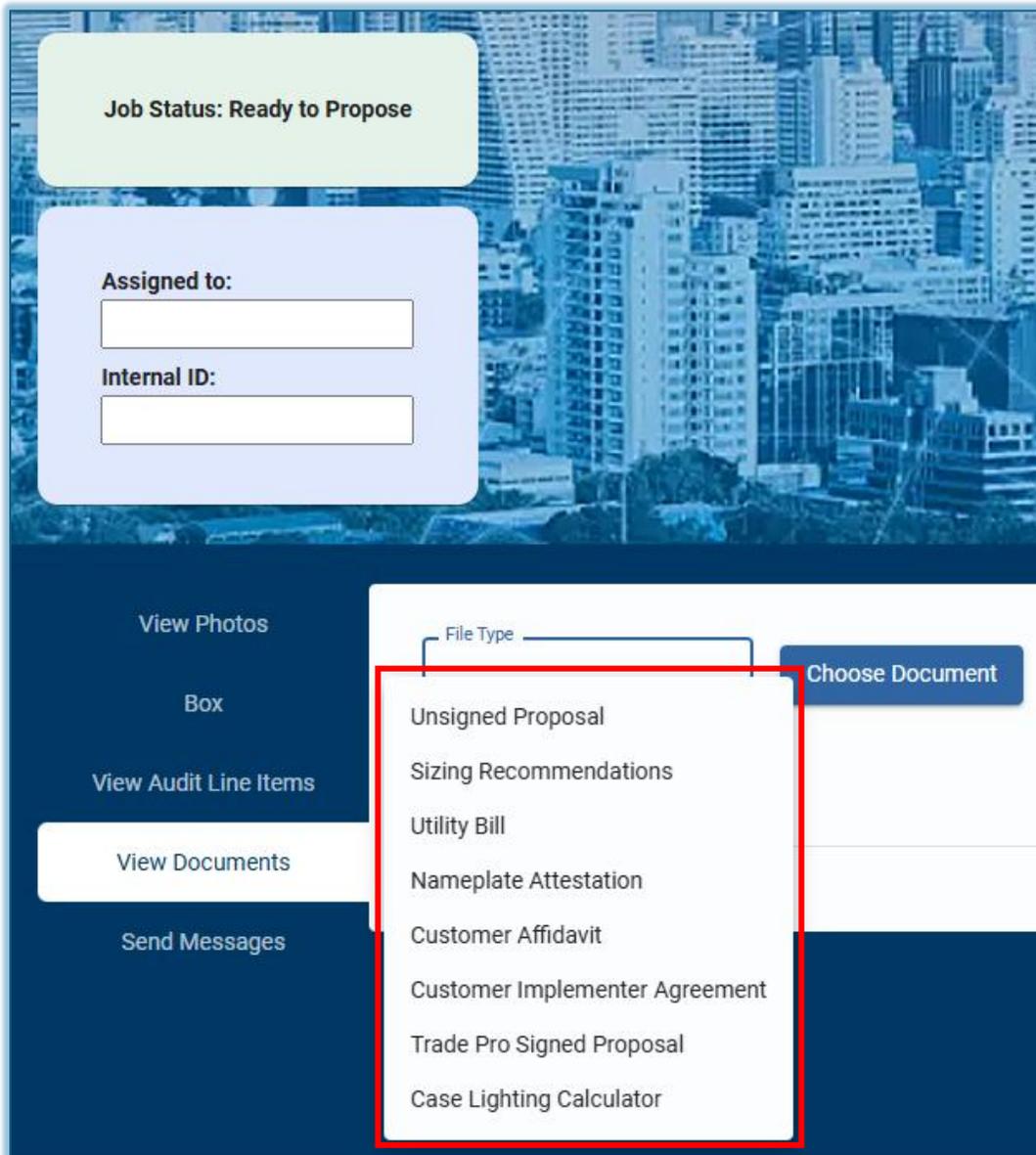


Figure 28 – View Documents – Document Types – Audit Stage

When the application becomes a **Project**, the following document types are available:

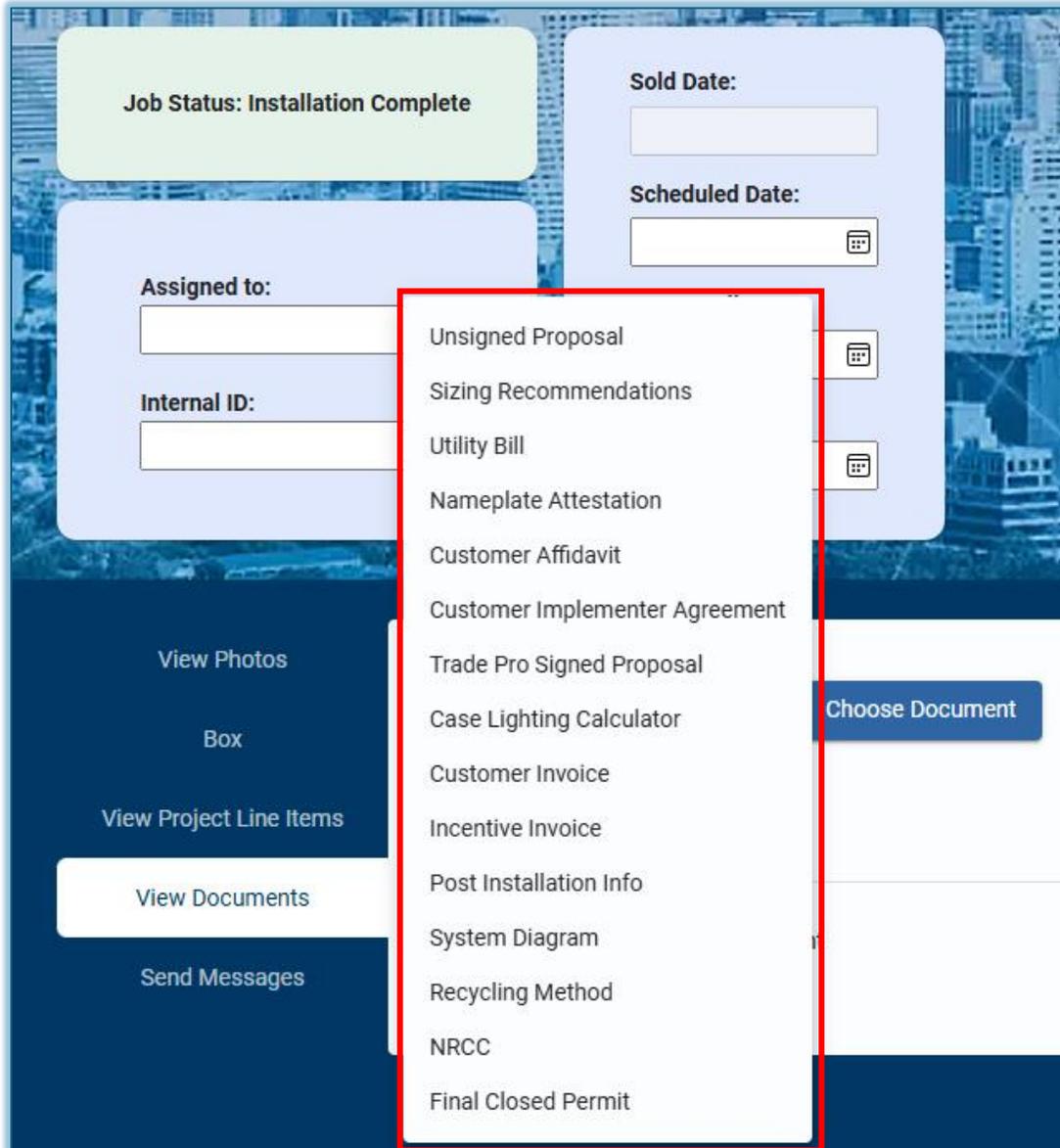


Figure 29 - View Documents – Document Types – Project Stage

Note: When an **Unsigned Proposal** is uploaded the Project Status will change from **Job Assigned** to **Ready to Propose**.

Document Upload Notification:

When a document is uploaded to the Portal, an email notification is sent to the team, notifying them of the new document for the application.

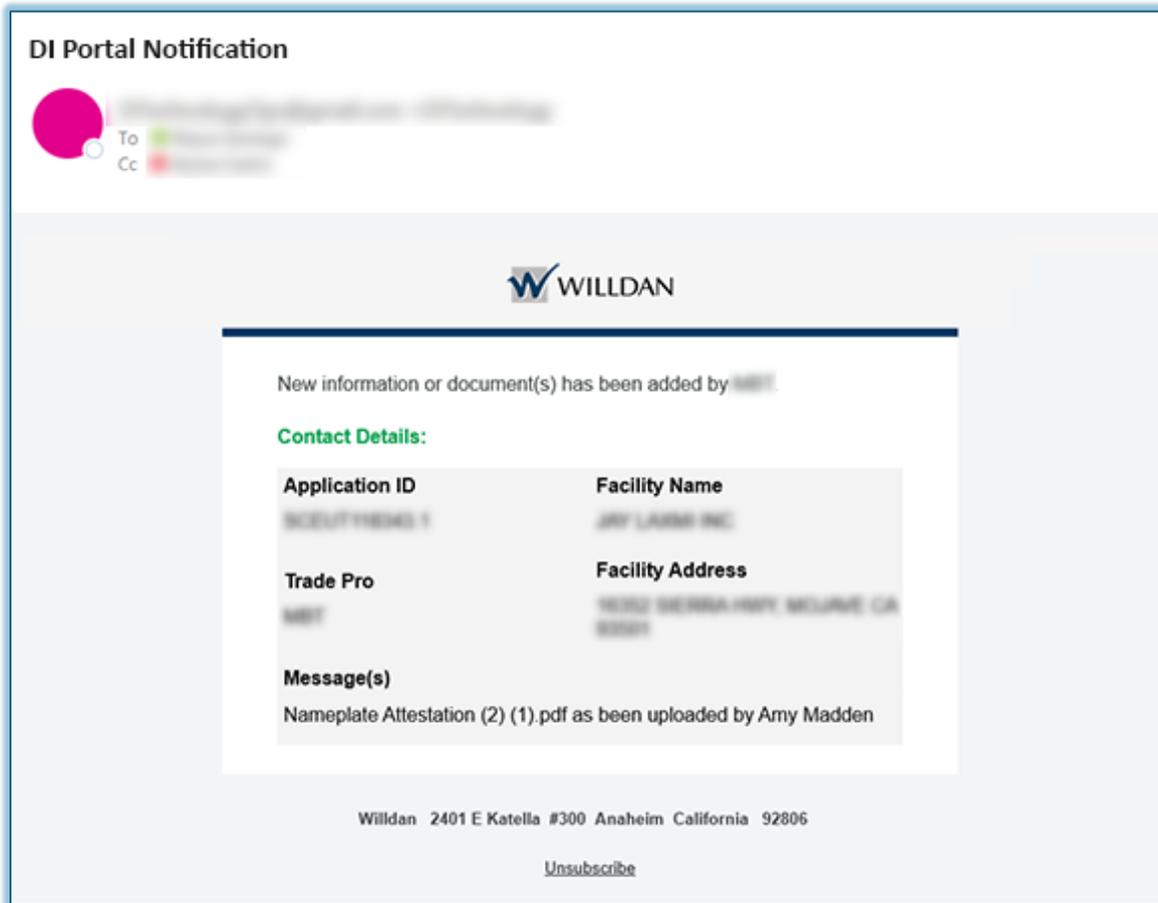


Figure 30 – Document Upload Notification

4.9 – Send Messages (Chat)

The Send Messages feature provides real-time chat.

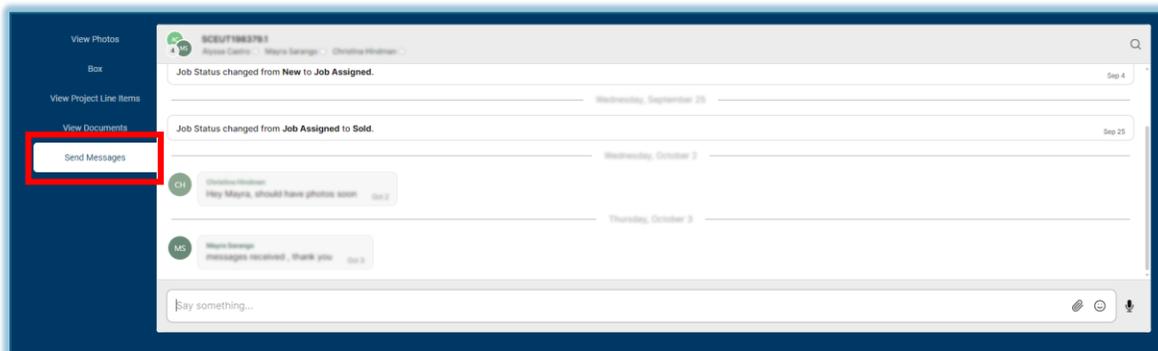


Figure 31 – Send Messages – Live Chat

Chat is used to share job status updates. If you're not logged into the Portal when a message is sent, you'll receive an email notifying you of any unread chat messages.

If you're not logged into the Portal when a chat message is sent, you'll receive an email notification. Simply click the **Join the Chat** link (bottom-left) in the email to be directed to the specific chat message for the relevant application in the Portal.

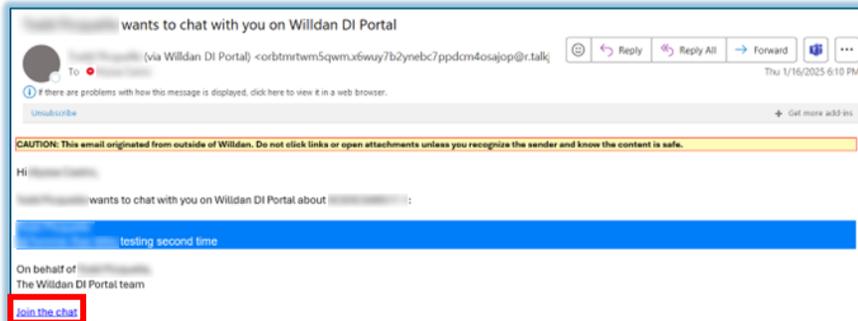


Figure 32 – Send Messages – Join the chat

5. Important Job Dates

Once a job is marked as Sold, the its status changes from **Ready to Propose** to **Sold**, and the project will be created. At this point, important job dates will be updated, such as: Sold Date, Scheduled Date, Estimated Install Date, and Install Date.



Figure 33 – Viewing Sold/Scheduled/Est. Install & Install Dates

5.1 - Sold Date

Once the Proposal is signed by the customer, the date is automatically entered here. This date is locked and cannot be changed.

5.2 - Scheduled Date

To be set once your team has scheduled installation. Setting the installation scheduled date will move the job from **Sold** to **Installation Scheduled**.

5.3 - Estimated Install Date

Set once you have an estimated completion date. Setting the estimated installation date will change the status from **Installation Scheduled** to **Pending Install**.

5.4 - Install Date

This is determined once all sold items in a job are installed, and all installation photos and required documents have been submitted.

6. Conclusion

This user guide highlights the key features of your Trade Pro Portal, helping you manage jobs, track progress, upload documents, and communicate with your Willdan Program Team. Our goal is to enhance your experience and streamline your workflow.

To contact Willdan support regarding the Trade Pro Portal, send an email to:

DI-Technology-Operations@willdan.com

If you are experiencing other non-DI related IT issues (such as logging in), please contact the Willdan IT Services Help Desk at 1-844-570-1040. IT hours are Monday through Friday from 8AM to 5PM PST.

Willdan Group, Inc.

2401 East Katella Avenue, Suite 300 Anaheim, California United States 92806