

A Willdan Software

Vision.
Insight.
Perspective.



- ✓ Connect your sales and administrative staff directly to the program.
- ✓ Manage the entire process all in one place.
- ✓ Deliver better programs, faster.
- ✓ Easily manage your workflow on the go.

Learn more about ViewPoint's different functionalities,
tailored to each unique user.

www.wildan.com



ViewPoint

A Willdan Software

Vision. Insight. Perspective.

ViewPoint is a program management software tool that puts **you** in control of your operations.



Check in on the progress on your projects



Conduct energy assessments and track data in the field



Communicate with your team members to manage your sales pipeline



Track and report on performance for your clients

Connect your team, clients, and customers all on one platform.

User Types

ViewPoint-Willdan

Program Administrators, Customer Service Representatives

ViewPoint-Contractor

Contractor Customer Service Representatives

ViewPoint-Assessment Tool

Contractor Lead Generators, Energy Service Representatives, Auditors, Installers, Inspectors

Cybersecurity Highlights



Multi-factor authentication for application access, minimizing the risk of password compromises and unauthorized system access



Built-in Firewall protects against the top-10 vulnerabilities identified in the Open Web Application Security Project (OWASP)



Geo-based replication to provide powerful disaster recovery solutions ensuring that ViewPoint is always up and running



Powerful tools to monitor, log and analyze the live environment, designed to help ViewPoint continuously improve performance and usability



Planned maintenance can be done without any downtime - ViewPoint automatically directs traffic to alternative endpoints while the maintenance is in progress



ViewPoint-Willdan

Browser-based desktop dashboard
for Willdan team program operations



— Program Administrators

- Manage and securely store program information, users, and documentation
- Update procedures and track progress for regular reporting
- Manage and run system, program, and finance reports



— Customer Service Representatives

- Track status of assessments, audits, and work orders through the workspace dashboard
- Search for facilities, assessments, and audits to assign to sales personnel
- Manage and update audits with documentation upload and verification
- Move sold projects to the construction phase
- Assign work orders to pass projects to contractors
- Identify and organize facilities with the campaign feature
- Oversee and manage work orders and customer records
- Complete final work order validations, updates, and approval for billing and invoicing
- Run system, program, and finance reports



ViewPoint-Contractor

Browser-based desktop dashboard for program contractor operations



— Contractor Customer Service Representatives

- Track status of assessments, audits, and work orders through the workspace dashboard
- Search for facilities, assessments, and audits to assign to contractors
- Oversee and manage work order assignments, statuses, and scheduling

ViewPoint-Assessment Tool

Browser-based mobile tool for operations in the field, designed for Microsoft Surface

The Assessment Tool has four modes for four different assessment tool user types:
Lead Generators, Customer Service Representatives, Auditors, and Installers



— Contractor Lead Generators

- Update assigned customer records during the lead generation phase
- Input facility information before an energy assessment
- Schedule appointments
- Verify customer facilities as leads to be qualified by a customer service representative



Customer Service Representatives

- Track and update the status of assigned projects
- Update assigned customer records during the lead generation phase
- Input facility information before an energy assessment
- Schedule appointments
- Verify facility information and program interest, flag customer facilities requiring a contractor energy assessment
- Perform energy assessments on-site – Ability to build and submit an energy assessment on the go using a tablet
- Propose completed audits to customers for approval
- Upload signed documentation and flag as sold to move projects to the quality assurance and construction phase
- Use the customer search function for Willdan's customer service representatives – Search for any facility at any phase of the project process
- Review all facility information and work order history



Auditors

- Track and update the status of assigned projects
- Schedule appointments
- Perform energy assessments on-site – Ability to build and submit an energy assessment on the go using a tablet



Installers

- Track and update the status of assigned projects
- Review all documentation and work order details to perform the installations
- Update a project's scope of work based on actual measures installed
- Schedule installations