ONLINE APPLICATION PORTAL

Annual Membership Meeting

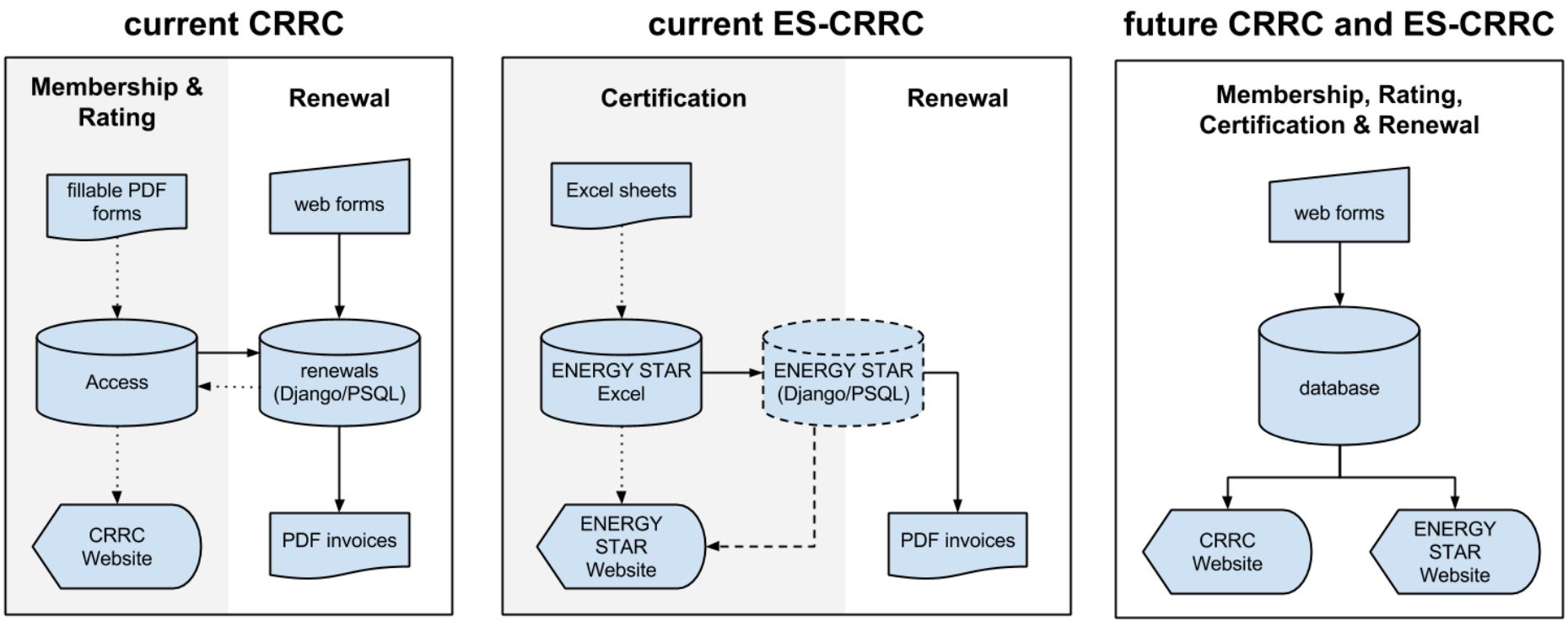
June 15, 2016

BACKGROUND

PRODUCT RATING PROGRAM

- Current process:
  - Download PDF forms from CRRC website
  - Fill out and sign, submit through email
  - Staff process applications by hand
  - Progress checks only available through direct contact with staff
- Future process…

IT STRATEGIC PLAN



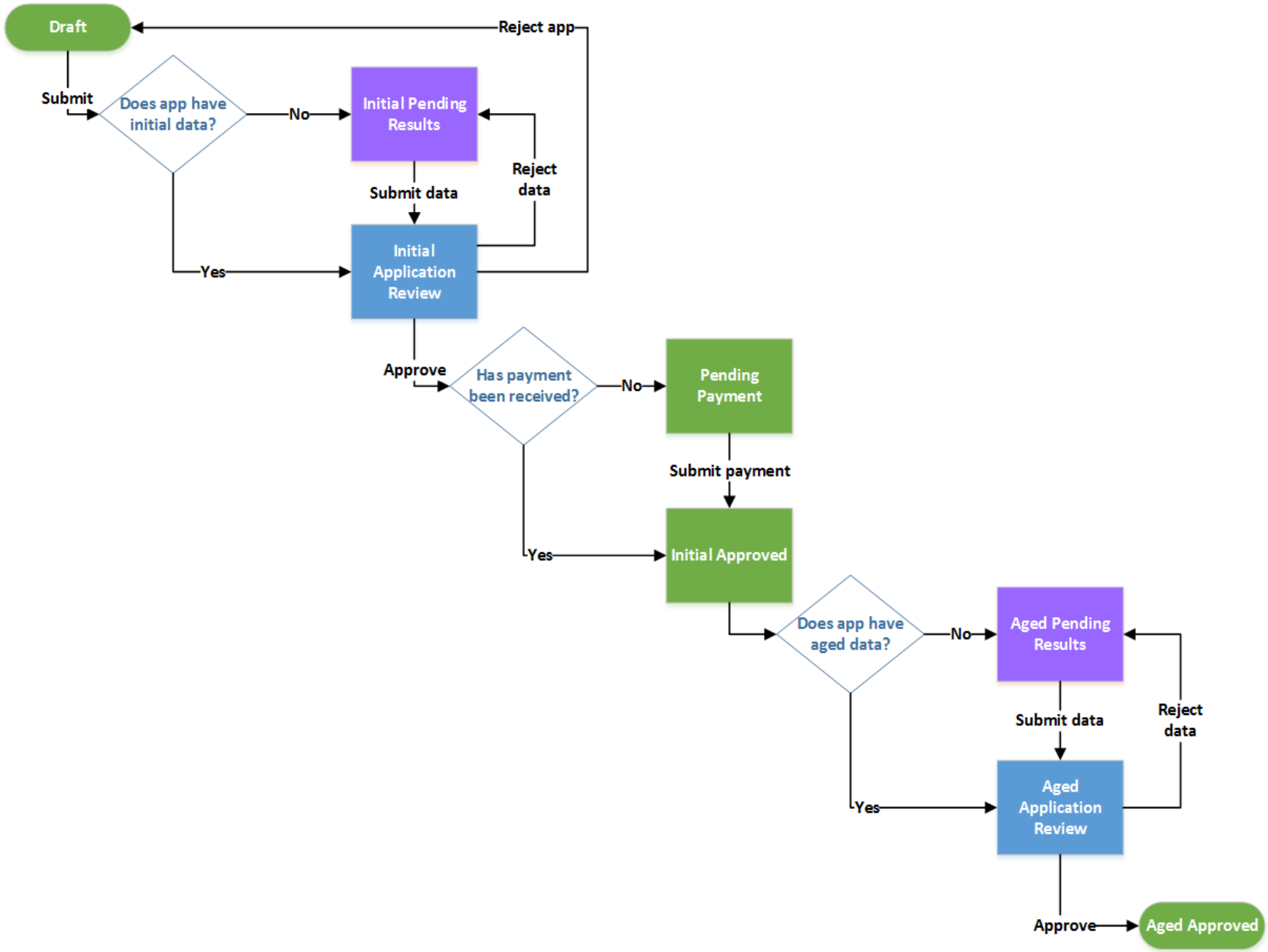
ONLINE APPLICATION INTERFACE

- Empowers customers to manage their product listings and applications online
- Enables labs to directly submit data to CRRC
- Uses automated processes to transfer data and move applications forward
- Serves as a database for staff

TIMELINE

- RFP to be reviewed at June 16 Board of Director's Meeting
- System under development and testing throughout 2017
- Estimated launch Q1 2018

MOCK-UPS


Draft
Reject app
Submit
Does app have initial data?
No
Initial Pending Results
Reject data
Submit data
Initial Application Review
Yes
Approve
Has payment been received?
No
Pending Payment
Submit payment
Yes
Initial Approved
Does app have aged data?
No
Aged Pending Results
Submit data
Reject data
Yes
Aged Application Review
Approve
Aged Approved

ONLINE APPLICATION INTERFACE

CRRC COOL ROOF RATING COUNCIL ®

Welcome, Jeff!
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DASHBOARD | ACCOUNT MANAGEMENT | COMPANY INFORMATION | CHECKOUT

FILTER BY:

Application Status (Select All / Clear All)

- ☐ Draft
- ☐ Pending Test Results
- ☐ Application Review
- ☐ Three-Year Pending
- ☐ Three-Year App Review
- ☐ Suspended
- ☐ Inactive
- ☐ Approved

Application Type

- ☐ CRRC
- ☐ ES-CRRC
- ☐ Rapid Ratings

Product Type

Select Product Type

+ NEW APPLICATION

⚠ You have 1 application with alerts.

EXPORT ALL APPLICATIONS

Application	Type	Alert	Status	Status Date	Product ID	Manufacturer	Brand	Model	Product Type	+
ABC-0001	E★ RR		Approved	10/10/15	1234-0001	ABC Coatings	Coat Brite	White 5000	Coating	>
ABC-0002	E★		Pending Test Results	10/12/15	1234-0002	ABC Coatings	Coat Brite	4D Gray	Coating	>
ABC-0003	RR	⚠	Application Review	10/12/15	1234-0003	ABC Coatings	Super Coat	Superior Green	Coating	>
ABC-0004			Draft	10/20/15		ABC Coatings	Coat Brite	White 6000	Coating	>
ABC-0005	RR		Draft	10/20/15		ABC Coatings	Sure Coat	Sure Coat XLC Blue	Coating	>
ABC-0006			Draft	10/20/15		ABC Coatings	Coat Brite	White 7000	Coating	>
ABC-0007	RR		Draft	10/20/15		ABC Coatings	Sure Coat	Sure Coat XLC Tan	Coating	>

ONLINE APPLICATION INTERFACE

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- ☐ Rapid Ratings

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ABC-0001	E★ RR		Approved	10/10/15	1234-0001	ABC Coatings	Coat Brite	White 5000	Coating	>
ABC-0002	E★		Pending Test Results	10/12/15	1234-0002	ABC Coatings	Coat Brite	4D Gray	Coating	>
ABC-0003	RR	⚠	Application Review	10/12/15	1234-0003	ABC Coatings	Super Coat	Superior Green	Coating	⌄

Color: Bright White

Alert Mesage: Application has been submitted. Payment is required to continue.

Solar Reflectance:
Initial: *0.86*
Rapid: *0.78*
3 year: *Pending*

Thermal Emittance:
Initial: *0.89*
Rapid: *0.86*
3 year: *Pending*

SRI:
Initial: *108*
Rapid: *96*
3 year: *Pending*

ABC-0007	RR		Draft	10/20/15		ABC Coatings	Sure Coat	Sure Coat XLC Tan	Coating	>

ONLINE APPLICATION INTERFACE

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- ☐ Suspended
- ☐ Inactive
- ☐ Approved

Application Type

- ☐ CRRC
- ☐ ES-CRRC
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ABC-0002	E★		Pending Test Results	10/12/15	1234-0002	ABC Coatings	Coat Brite	4D Gray	Coating	>
ABC-0003	RR	⚠	Application Review	10/12/15	1234-0003	ABC Coatings	Super Coat	Superior Green	Coating	>
ABC-0004			Draft	10/20/15		ABC Coatings	Coat Brite	White 6000	Coating	>
ABC-0005	RR		Draft	10/20/15		ABC Coatings	Sure Coat	Sure Coat XLC Blue	Coating	>
ABC-0006			Draft	10/20/15		ABC Coatings	Coat Brite	White 7000	Coating	>
ABC-0007	RR		Draft	10/20/15		ABC Coatings	Sure Coat	Sure Coat XLC Tan	Coating	>

ONLINE APPLICATION INTERFACE

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DASHBOARD | ACCOUNT MANAGEMENT | COMPANY INFORMATION | CHECKOUT

From here, you can:
- **Manage your account**
- **Change settings**
- **Add or remove user accounts**

Need Support?
Email us!
1 (866) 465-2523

My Account Information

Username:	*jsteuben*
First Name:	Jeff
Last Name:	Steuben
Email Address:	jeff@coolroofs.org
Phone:	510-482-4420 x288
Password:	**********

Company Users

Username	Contact Name	Admin?	Active?	
crichter	Carolyn Richter		X	
jsteuben	Jeff Steuben	X	X	
sschneider	Sarah Schneider	X	X	

+ Add User

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My Account Information

Username:
First Name:
Last Name:
Email Address:
Phone:
Password:

Company Users

Username	Contact
crichter	Carolyn
jsteuben	Jeff Steu
sschneider	Sarah Sc

+ Add User

Edit My Account Information

Username:	*jsteuben*
First Name:	Jeff
Last Name:	Steuben
Email Address:	jeff@coolroofs.org
Phone:	510-482-4420 x288
Old Password:	
New Password:	
Confirm New Password:	

Cancel | Save

ONLINE APPLICATION INTERFACE

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DASHBOARD | ACCOUNT MANAGEMENT | COMPANY INFORMATION | PAYMENTS

From here, you can:
- **Become a Member, Licensee or ENERGY STAR Partner**
- **Manage your company's status**
- **Add or change company contact information**
- **Manage your manufacturing locations (Licensees only)**

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Company Status

Company Name:	ABC Coatings	
Member:	Class A - Manufacturer	Active
Licensee:	LSOM ID: 0555	*Suspended*
Licensed Seller: Yes LS Class: Revenue <$1M	Other Manufacturer: No OM Class: N/A	
ENERGY STAR Partner	No	Become an EPA Partner

Company Contacts & Locations

			Primary	Secondary
1. Jeff Steuben 449 15th st. Suite 400	jeff@coolroofs.org Oakland, CA 94612	510-482-4420 x288 USA	●	○
2. Sarah Schneider 555 27th Ave	sarah@coolroofs.org Akron, OH 44322	510-482-4420 x202 USA	○	●

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Company Status

Member:	Class A - Manufacturer	Active
Licensee:	LSOM ID: 0555	*Suspended*

Licensed Seller: Ye
LS Class: Sales <$

ENERGY STAR Part

Your Licensee Status is currently *Suspended.*
This status change occurred on: **June 1, 2016**
Reason: Renewals payment not received
Resolution: Submit payment, including late fee, at Checkout
For more information, see:
Explanation of States and Statuses

Company Contacts & Locations

			Primary	Secondary
1. Jeff Steuben 449 15th st. Suite 400	jeff@coolroofs.org Oakland, CA 94612	510-482-4420 x288 USA	●	○
2. Sarah Schneider 555 27th Ave	sarah@coolroofs.org Akron, OH 44322	510-482-4420 x202 USA	○	●

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ONLINE APPLICATION INTERFACE

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DASHBOARD | ACCOUNT MANAGEMENT | COMPANY INFORMATION | CHECKOUT

Product Rating Application

Application Number: ABC - 0007
Current Status: Draft

> Save | > Cancel | > Submit

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PRODUCT INFORMATION

Application Type* Standard Product

Rating Options
Select all that apply:
- ☒ CRRC ($250)
- ☐ ENERGY STAR® ($100)
- ☒ Rapid Ratings ($200)
- ☐ LS/OM Reference ($250)

Brand* Sure Coat

Model Name* Sure Coat XLC Tan

Model Number* Sure Coat XLC Tan

Product Type* Field Applied Coating

Slope* Both Low and Steep

Market* Both End User and Oth

Color*
Select all that apply:

☐ Red	☐ Purple	☒ Tan
☐ Orange	☐ Bright White	☐ Brown
☐ Yellow	☐ Off-White	☐ Metallic
☐ Green	☐ Black	☐ Multicolor
☐ Blue	☐ Gray	

Minimum manufacturer recommended dry mil thickness (mils)* 10 mils

Upload Product Specification Sheet & Material Safety Data Sheet

Select	Document Name	Date Created
No records found.		

+ Add New File

CONTACT INFORMATION

Product Contact*	Sarah Schneider + Add New Contact	Sarah Schneider Product Manager	555 27th Ave Akron, OH, 44322	sarah@coolroofs.org 510-482-4420 x202
Manufacturer SKU*	1002334			
Product Webpage	www.abccoatings.com			
Manufacturing Facility*	ABC Coatings Headquar + Add New Facility	ABC Coatings Headquarters	449 15th st. Suite 400 Oakland, CA 94612	510-482-4420

TEST RESULTS REPORT

Test results will be incorporated by the laboratory during the "Pending Test Results" application status.

Test Laboratory*	Product Testing Inc.	Dave Davidson Roofing Manager	126 Elm St Indianapois, IN 46201	daved@ptilab.com 555-451-9987 x188

Save Cancel Submit

Product Rating Application

Application Number: ABC - 0007
Current Status: Draft

> Save | > Cancel | > Submit

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1 (866) 465-2523

PRODUCT INFORMATION

Application Type* Standard Product
Product Type* Field Applied Coating
Rating Options Select all that apply:
- ☒ CRRC ($250)
- ☐ ENERGY STAR® ($100)
- ☒ Rapid Ratings ($200)

Slope* Both Low and Steep
Market* Both End User and Oth
Color* Select all that apply:
- ☒ Tan
- ☐ Brown
- ☐ Metallic
- ☐ Multicolor

Brand*
Model Name*
Model Number*
Minimum manufa
Upload Product Sp
Select | Document
No records found.
+ Add New File

SUBMISSION CONFIRMATION

⚠ Warning: data cannot be edited once submitted.

Please review and confirm all information in this application before submitting to CRRC staff for Application Review.
Payment will be required before the application can be approved.

Are you sure you want to submit this application?

> No, Cancel and Return to Application | > Yes, Submit Application

CONTACT INFORMATION

Product Contact* Sarah Schneider
+ Add New Contact

Sarah Schneider, Product Manager | 555 27th Ave, Akron, OH, 44322 | sarah@coolroofs.org, 510-482-4420 x202

Manufacturer SKU* 1002334
Product Webpage www.abccoatings.com

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DASHBOARD | ACCOUNT MANAGEMENT | COMPANY INFORMATION | PAYMENTS

From here, you can:
- View your items pending payment
- Print your CRRC Invoice
- Submit payment via check or PayPal

Need Support?
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Select	Transaction Type	Description	Brand	Model	Fee Amount
☑	Membership	Class A - Manufacturer	-	-	$750
☑	Licensee	<$1M Revenue	-	-	$1,575
	Standard Product	**Initial Ratings**			
☐	Field-Applied Coating	CRRC 0555-0023	EverCote	White XL	$250
☑	Field-Applied Coating	CRRC 0555-0026	EverCote	Tan LG	$250
	Standard Product	**Rapid Ratings**			
☑	Field-Applied Coating	CRRC 0555-0026	EverCote	Tan LG	$200

Print Invoice | Pay Now | **Subtotal: $2,775**

CONCLUSION

CONCLUSION

- Proactively avoids legacy IT systems from becoming obsolete
- Improves customer experience and saves staff time
  - Faster application submission & approval
  - Licensee control over product management
  - More convenient payment process
  - Transparency into product rating status and action items

QUESTIONS?