



SPM Command Center

User Guide and Standard Operating Procedure (SOP)

A plain-language guide to every part of the Solar Power Midwest dashboard. Written so anyone can follow it, step by step.

Solar Power Midwest, LLC

Naperville, Illinois

Internal use only

Version 3.8 · Updated July 16, 2026

What's new

Recent updates to the dashboard and this guide. The newest version is at the top.

Version 3.8 · July 16, 2026 · Current

A big batch across the Sniper Scheduler, the lead window, and Air Campaign. The Sniper Scheduler now color-codes appointments by host (Dave blue, Priscilla purple, Austin teal) with meeting type shown as a shade plus an icon, adds a third meeting type (Virtual, which auto-creates a Zoom meeting), lets you pick and reassign a Host on any appointment, adds an Attendees section with RSVP status and the ability to invite more people, lets you edit an event's exact Start and End time, and shows the timezone on the When line. The lead window gets a new violet Script tab (the Outreach Playbook filtered to that customer), and the Customer Facing Chat composer gained a one-click Draft button (now including the customer's own booking link in drafted texts), an auto-growing message box, a Save to documents link under any photo or file a customer sends, a Voice note button that texts a tap-to-listen audio link, and Link offers toggle chips that control which appointment types a customer's booking link offers. The email compose modal adds a From dropdown (Austin or Info) with automatic team BCC, plus a Pre-position package button. Edit customer info now auto-fills a missing city/state/ZIP from Google when you save a partial address. Air Campaign gets a new Website analytics tab (AI search referrals, Leads by source, Google Search keywords, and an AI 'What to do next' panel) and real Connect buttons (via Zernio) for Facebook, Instagram, and LinkedIn, plus a Writing voices panel so each teammate can connect their own Gmail to train their writing style. Lead source is now a nested taxonomy (Knocked/Internet with sub-sources) reflected in the Kanban filters and War Map legend, Fixr/SolarReviews intake now captures and reliably saves the Origin URL and context note, the Permit Difficulty by Jurisdiction panel is now collapsible, and War Room debrief action items now have completion checkboxes.

- Edit customer info: saving a lead with a street address but no city or ZIP now auto-fills the missing city/state/ZIP from Google, only when it finds one confident match.
- Appointment modal (Sniper Scheduler): a new Attendees section shows who is invited on a Google appointment, with their RSVP (accepted/declined/maybe/pending), and lets you add more people by email right from the modal; adding someone writes to Google Calendar and emails them an invite.
- Lead window: new violet Script tab shows the Outreach Playbook automatically filtered to that customer's industry and to the stage matching how aged the lead is, with Copy buttons and stage pills to browse.

- Customer Facing Chat composer: a one-click Draft button (violet sparkle, next to the mic) writes the best next text for the lead using their industry, lead age, and the conversation so far, then drops it in the box to review and send.
- Appointment modal edit form: you can now edit an event's Start and End time directly (Central) from the pencil Edit button, alongside Title/Type/Lead; the change writes to Google Calendar. (The slot-based Reschedule flow still exists for lead appointments.)
- Appointment detail modal: the When line now shows the timezone (e.g. "11:00 AM - 12:30 PM CDT") so the meeting time is never ambiguous.
- Customer Facing Chat composer: the message box now grows taller as you type, then snaps back to one line after you send (also grows to fit an AI/voice draft).
- Sniper Scheduler: appointments are now color-coded by host (Dave = blue, Priscilla = purple, Austin = teal) with the meeting type shown as a shade (phone lightest, virtual medium, in-house darkest) plus a phone/video/house icon. Existing appointments show in Dave's blue until a host is assigned.
- Booking an appointment: you now pick a Host (Dave/Priscilla/Austin, defaults to Dave) and can choose a third meeting type, Virtual, alongside Phone and In-house. Titles read "[Type] consultation with [Host]: [Customer]".
- Booking a Virtual appointment auto-creates a Zoom meeting (under the SPM Zoom account) and puts the join link on the calendar invite; the appointment pop-up shows a "Join Zoom meeting" link.
- Appointment pop-up: shows "Hosted by [Name]" and, in edit mode, a Host dropdown so you can reassign any meeting to a different host (which recolors it on Google Calendar too).
- Permit Difficulty by Jurisdiction (AHJ) panel is now collapsible: click its header to fold/unfold the county cards. It auto-expands when you click a county on the map so the focused card is visible.
- Email compose modal: a From dropdown lets you send as Austin (austin@) or Info (info@). Every email now blind-copies (BCC) Dave, Priscilla, info, and you for team visibility, hidden from the customer.
- War Room meeting debrief: each action item now has a checkbox to mark it complete. Completed items strike through and dim, and the state is saved so it stays done after a reload.
- Customer Facing Chat: when a customer sends a photo or file, a "Save to documents" link now appears under it. Pick a category and it files the attachment into the lead's Documents in the Notes section.

- Air Campaign > Website tab: new "AI search referrals" panel shows visits that came from AI answer engines (ChatGPT, Perplexity, Gemini, Copilot, Claude), broken down by engine, your GEO scoreboard for whether AI is citing the site.
- Air Campaign > Website tab: a "Leads" tile and a "Leads by source" panel now show conversions (estimate/contact/booking form submits + phone-number taps) broken down by traffic channel, so you can see which channels actually produce leads.
- Air Campaign > Website tab: new "Google Search" section (from Search Console) shows the actual keywords people use to find you on Google, top queries with clicks/impressions/position, totals, and top pages in search.
- Air Campaign > Website tab: new "What to do next" AI panel. Click "Get recommendations" and it reads your live GA + Search Console numbers and returns prioritized, specific SEO and GEO action steps. On-demand so it only runs when you click.
- Lead panel: new "Link offers:" toggle chips (Phone / Virtual / In-home) next to Copy booking link. Turn a type off and the customer's pre-filled booking link stops offering it; at least one type must stay on. Enforced server-side too.
- Voice note to customer: new "Voice note" mic button in the lead Conversations composer records a note and texts the customer a tap-to-listen link; sent notes show an audio player in the thread.
- Lead source is now a nested taxonomy: parent (Knocked / Internet) with child sub-sources (Canvassing; Fixr / SolarReviews / SPM Website). Both the Kanban filter bar and the War Map Leads legend now have nested source chips. Backfilled ~1,300 aggregator leads as Internet > Fixr.
- Writing voices (Social Media > Strategy): each person (Dave, Austin, Info, Priscilla) now connects their own Gmail read-only to learn their individual writing voice; per-person Connect/Disconnect + "Rebuild all". Separate from the calendar/email-send Google connection.
- Fixr / SolarReviews intake now captures each lead's "Origin URL" (the aggregator site it came from) into the lead note.
- Fixr / SolarReviews intake notes now actually save (fixed a silent NOT NULL failure); setters will now see the full Fixr context note on each imported lead.
- Email compose modal: new "Pre-position package" button generates a one-page pre-position email in Dave's 6-part structure, with an optional personal-note box, for sending before an appointment.
- SMS "Draft" button now includes the customer's own pre-filled booking link as the call to action, instead of a generic booking page.

- Marketing > Social Media: Facebook, Instagram, and LinkedIn sub-tabs now show a real Connect button (via Zernio) and a Connected status with a Refresh action, replacing the "Coming soon" placeholders. Discord unchanged. (Analytics + posting come in later phases.)

Version 3.7 · July 14, 2026

A big polish batch across the War Map, Team Comms, the lead window, and mobile. The Recon War Map got a full redesign: a new left-nav War Map shortcut that opens it in full screen, owner locations as blue house-pin icons, a collapsible Layers box with a turn-all-on check box, a two-column Labels toolbar with glossy icons, a centered Hide/Show icons pill, and a new High-value targets layer that pins your farm and manufacturer prospects with detailed popups (address, owner, phone, email, an estimated kW range, monthly bill, and permits). Every pin now opens a redesigned card that fades in above the pin with a tail pointing at it. Team Comms gained read receipts (Seen by), a right-side message toolbar with Copy and an AI button that turns a message into Taskers or Seeds, a reaction picker that no longer clips at the screen edge, and a Save to a record button that now files an attachment to an Air Raid lead as well as an Ops customer. The lead window's Conversations tab is now the blue Customer Facing Chat (with the amber Team chat beside it), photos a customer texts now show in the thread, Edit info has address autocomplete and a Save that works for every lead, and the Documents list shows colored file names, photo thumbnails, and an in-app viewer. The top-bar Refresh button was retired in favor of live updates everywhere. Mobile got a pinned dialer number, disabled page zoom, smooth accordion and menu animations, roomier calendar cells, a book-event window that fits the screen, an auto-opening full-screen call window, and push notifications for new leads and customer replies. Website: the Energy Plan Builder now captures a property address so those leads reach the dashboard with an address on file.

- Recon: a new War Map shortcut in the left menu jumps straight to the War Map and opens it in full screen automatically; exit full screen to return to the normal map + territory list.
- War Map: owner locations now show as a blue house-pin icon instead of a plain dot.
- War Map: the AHJ, Parcels, Businesses, Owner pins, and High-value targets overlays are gathered into one collapsible Layers box with a check box at the top that turns every layer on or off at once (each still toggles on its own). On desktop it sits at the top by the full-screen button; on mobile it sits lower-left and opens upward.
- War Map: a new High-value targets layer pins your dairy-farm and manufacturer prospects (indigo farm/factory pins). Turn it on, click Geocode prospects once to place them, then click a pin for a popup with the business name, a Farm or Manufacturer badge, address, owner, phone, email, an estimated kW system-size range, an estimated monthly electric bill, and any permits on file (blank fields show Not gathered / Not on file).

- War Map: clicking any pin opens a redesigned popup card that fades in directly above the pin with a downward tail pointing at it, and fades out when closed. It applies to every pin type (leads, customers, reviews, owner locations, high-value targets).
- War Map: the Labels toolbar is laid out in two columns with large glossy gradient icons; the Sync map pins control is a compact refresh icon that spins while it works; and the Hide/Show icons control is a blue labeled pill centered along the bottom of the map.
- Team Comms: read receipts. A Seen by line with teammate names appears under your most recent message once teammates have read past it.
- Team Comms: the message action buttons moved to the right side of a message and now include Copy (to clipboard) and an AI button (the sparkle) that extracts action items and adds each to Eagle's Nest as a Tasker or Seed in one tap. On mobile the buttons appear just above the bubble so they are no longer cut off. The reaction picker opens toward the message so it is never clipped, and applied reactions show larger and bolder.
- Team Comms: a shared file's Save to a record button now files it to either an Ops customer or an Air Raid pipeline lead (search by name or phone); saving to an Air Raid lead uses the lead document categories (Utility bill, Contract, Proposal, ID / Ownership, Photos, Other).
- Lead window: the Conversations tab is now the blue Customer Facing Chat (with a banner reminding you messages go to the customer) sitting next to the amber Team chat. Photos a customer texts to the SPM number now show right in the thread (tap to open full size).
- Lead window: Edit info now has Google address suggestions on the Street address field (pick one to fill street/city/state/ZIP), and Save changes works for website and dialer leads that were never in GHL. A full-screen toggle next to the close X expands the whole lead window on desktop.
- Lead window Documents: each file's name is colored to match its category, photos show a thumbnail preview, and clicking a file opens an in-app viewer (images, PDFs, video, audio). Photos, PDFs, and a voice note a homeowner attaches on the website flow in automatically.
- The top-bar Refresh button was retired. The command center updates live on its own: chat, reactions, leads, and notifications in real time, and the calendar, Ops tracker, Taskers/Seeds, and customer chat auto-refresh in the background. (AI status-summary cards keep their own Refresh on purpose.)
- Mobile: your SPM dialer number is pinned under the top bar on every page, page pinch-zoom is disabled (maps still zoom), accordions and the slide-in menu animate smoothly, month-view calendar cells are roomier and scroll to show every week, the book-event window fits the screen, and the full-screen call window opens on its own when a call starts dialing.

- Push notifications now also fire for a new lead coming in and for a customer texting back, on desktop and the installed phone app.
- Air Raid: each product super-tag pill now carries a matching icon; Solar is amber and Siding is blue; and the Referral, New text, and Missed call badges use the same clean icon style.
- Website: the Energy Plan Builder now asks for a property address (with Google autocomplete) so those leads arrive on the dashboard with an address instead of No Address on File.

Version 3.6 · July 13, 2026

A big batch across Eagle's Nest, the calendar, the lead window, and outreach. Eagle's Nest got a top badge bar that jumps to and expands any section, collapsible Operational Overview / 13-Week Planning / Dialer / Ops & Leads sections, a new 13-Week Planning board (the 12+1 operating rhythm with the four quarterly sessions, a live sprint tracker, and Add-to-calendar), Subject + Details fields when adding Taskers and Seeds, voice dictation on all four of those fields that stays on until you tap the mic again, assignable Taskers/Seeds with an Assignee filter, an in-app attachment viewer, and an auto note to Team Comms when a Tasker is completed. The calendar now shows Dave's time-off in all three views, has a Month-view size control, auto-invites Priscilla to every event, shows the date in the appointment When line, and fixes two timezone bugs (booking a day scheduled it a day late, and clicking a day opened the wrong one). Dave now gets his own text + email reminders 24h before and at 8am the day of each appointment. The lead window's Notes tab gained a categorized Documents section, the conversation thread hyperlinks URLs and has a new AI voice assistant that drafts a text from what you say, and three AI helpers (Draft from last contact, Generate note from history, Summarize communication) now read the full local conversation history. Outreach now uses the right company name per industry (Solar Power Midwest for solar/commercial, Renovate Right 365 for windows/siding). Customers (Won stage) show in gold on the board and map, possible-duplicate intake leads are flagged, and the War Room lists your Scheduled Meetings. Email delivery moved to Resend.

- Eagle's Nest: a badge nav bar at the very top (Taskers, Operational Overview, 13-Week Planning, Dialer, Ops & Leads). Click a badge to jump to that section and auto-expand it. The Taskers badge shows the active count.
- Eagle's Nest: the Operational Overview, 13-Week Planning, Dialer, and Ops & Leads sections are now collapsible accordions; each remembers whether you left it open or closed.
- Eagle's Nest: new 13-Week Planning section (the 12+1 operating rhythm). Shows the four quarterly strategic planning sessions with dates and week ranges, a live 'Week X of 13' progress bar and countdown to the next session, the standing agenda, a 'Copy to share with

team' button, and an 'Add to calendar' button that creates all four sessions (9-11am Central, inviting Dave and Priscilla). Dates recompute automatically each year.

- Eagle's Nest: when adding a Tasker or a Seed you can now enter a Subject and a separate Details body; both save to the item.
- Eagle's Nest voice dictation now works on all four add fields (Tasker Subject, Tasker Details, Seed Subject, Seed Details), each with its own mic. Only one listens at a time, switching fields moves the mic, and each stays on until you tap it again instead of stopping on a pause.
- Eagle's Nest: Taskers and Seeds can be assigned to a specific person. Each card has an assignee dropdown, the board has an Assignee filter (Everyone / Unassigned / a person), and promoting a Seed opens a popup to optionally assign it. Requires the 2026-07-13-executive-todos-assignee.sql migration.
- Eagle's Nest: clicking a Tasker attachment now opens it in an in-app viewer modal (previews images, PDFs, video, and audio; other file types get a download button) instead of a new browser tab.
- Eagle's Nest: when a Tasker is marked done, a 'Tasker completed: