



**Energy Finance Solutions
VelocityGO Procedures**
Contractor Comments Functionality

Procedure #	101.02
Revision #	1.0
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Last Revision Date:	N/A

Role	Contractor
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A. Purpose

The purpose of this procedure is to provide instruction on the understanding and use of the Comments functionality in the VelocityGo system.

B. Procedure

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Understanding Status Values

Response Status values:

- **In Queue:** This is the default value and means the comment needs to be looked at/responded to.
- **In Progress:** An internal User has received the comment but did not have an immediate response and is getting clarification/additional information in order to provide a response.
- **Not Required:** An internal User has determined a reply is not necessary.
- **Complete:** A reply has been made to that Comment and no further action is needed.



Loan Number: 355 Product Code: 355 Stage And Status: #Project & Document Review[Open#] Amount: \$21,000.00 Interest Rate (Rounded): 7.00%

Loan Application Document Manager Smart Checklist **Comments**

To	From	Subject	Comment	Response S...	Created Date
Slipstream	NVAII Contractor	Loan Details 2	https://slipstream2.my.salesforce.com/builder_platform_interaction/flowBuilder.app?flowId=3014W000000diVT&guid=8725fb7c392b0989f2a338144e0618a18dd3b4a-5c93	In Queue	8/21/2023, 12:50 PM
Slipstream	NVAII Contractor	This time we Flow!	Here goes some sharing magic.	In Queue	8/21/2023, 3:45 PM
Slipstream	NVAII Contractor	Here we go	Share this record please.	In Queue	8/21/2023, 4:22 PM
Slipstream	NVAII Contractor	Reply to this comment	I need to know how much I am being paid and on what date.	Complete	8/21/2023, 7:10 PM
NVAII Contractor	Slipstream	Reply to this comment (R...	Do not worry, we will be adding your funding date and amount to your Contractor Dashboard soon.	Complete	8/21/2023, 7:13 PM
Slipstream	NVAII Contractor	Reply to this comment (R...	Very good Slipstream!	Not Required	8/21/2023, 7:20 PM
NVAII Contractor	Slipstream	Question about payment...	Testing to verify the Loan Name now appears within the contractor email!	In Queue	8/22/2023, 12:02 PM
NVAII Contractor	Slipstream	Question about payment...	We will get right on that request so you can see how much you are being paid. Expect to see this information on your homepage within the next two weeks...	In Queue	8/22/2023, 12:34 PM
NVAII Contractor	Slipstream	Question about payment...	Yes, we are currently working on a solution so that all contractors can see their funding amount and date. Please be patient, this new functionality will be visible in the next...	In Queue	8/22/2023, 12:47 PM

Creating Comments

1. While in a Loan record, navigate to the Comments Tab.

The screenshot shows the 'Walker Dairy' loan record. At the top, there is a header with the loan name and a sub-header with loan details: Loan Number, Product Code (355), Stage And Status (#Project & Document Review|Open#), Amount (\$21,000.00), and Interest Rate (Rounded) (7.00%). Below this is a navigation bar with tabs: Loan Application, Document Manager, Smart Checklist, and Comments. The 'Comments' tab is highlighted with a red box. The main content area shows a 'Loan Dashboard' with sections for Loan Details(V), Project Information(V), Property Information(V), and Stage History.

2. Click "New" to create a Comment.

The screenshot shows the 'Comments' section of the loan record. It displays 'Comments (1)' with a sub-header '1 item • Updated a few seconds ago'. On the right side, there are three buttons: a settings gear, a refresh icon, and a 'New' button. The 'New' button is highlighted with a red box.

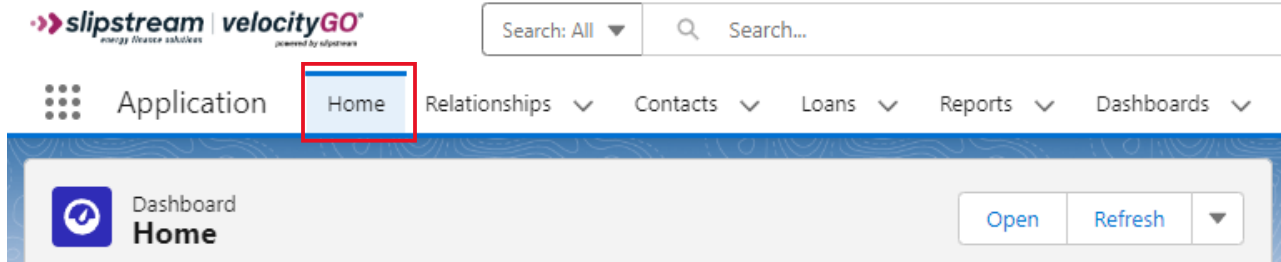
****Note:** A running list of any previous comments related to this Loan will also appear here

3. A New Comment popup will appear with four (4) required fields. Enter information as indicated and click 'Save'.
 - a. Contractor: begin typing the name of the Admin User and select as the Contractor.
 - b. Notify: select "Slipstream".
 - c. Subject: brief explanation of issue/question (similar to an email).
 - d. Comment: enter additional information regarding the question or concern.

The screenshot shows the 'New Comment' popup form. It is divided into several sections: 'Contractor and Notification Party', 'Comment Information', and 'Internal Use Only'. In the 'Contractor and Notification Party' section, the 'Contractor' dropdown is set to 'NYAll Contractor' and the 'Notify' dropdown is set to 'Slipstream'. Both dropdowns are highlighted with a red box. In the 'Comment Information' section, the '* Subject' and '* Comment' text areas are highlighted with a red box. At the bottom, there are three buttons: 'Cancel', 'Save & New', and 'Save'. The 'Save' button is highlighted with a red box.

Reviewing and Replying to Received Comments

1. Navigate to the Home Tab.



2. Review the 'My Comments' list view. To view the details on a Comment record and/or respond, click the Subject in the list view.

The screenshot shows the 'My Comments' list view. The 'Subject' column of the first comment is highlighted with a red box.

To	From	Subject	Comment	Respon...	Created Date	Loan
NYAll Contract...	Slipstream	Did you send me a message? (Reply)	Yes, we need more documentation ...	In Queue	9/7/2023, 3:30 PM	Jose Lamb - Loan - 16000.00
NYAll Contract...	Slipstream	Please Finish Application	Hello Sir, I noticed the application ...	In Queue	9/7/2023, 2:24 PM	Donald Byrd-NYSERDA Commercial...
NYAll Contract...	Slipstream	Please Finish Sending App Docs	Hello, we are missing a few docum...	In Queue	8/23/2023, 12:30 PM	Bucky's Snow Removal - DESEU Co...
NYAll Contract...	Slipstream	Please Upload Application Docume...	Thank you NYAll	Not Required	8/22/2023, 1:41 PM	Donald Byrd-NYSERDA Commercial...

3. Review the Comment from Slipstream.

The screenshot shows a comment detail view. The 'Comment' field is highlighted with a red box.

Comment
test (Reply) Reply

To: NY All Contractor | From: Slipstream | Created Date: 9/6/2023, 12:04 PM | Response Status: In Queue

Contractor and Notification Party

Contractor: NY All Contractor | Notify: Contractor

Comment Information

Subject: test (Reply)

Comment: Replying to verify functions

4. To respond, click the Reply button.

The screenshot shows a comment detail view. The 'Reply' button is highlighted with a red box.

Comment
test (Reply) Reply

To: NY All Contractor | From: Slipstream | Created Date: 9/6/2023, 12:04 PM | Response Status: In Queue

5. Enter the reply in the Comment field of the pop up. And click 'Send'
Reply

Please enter your reply in the Comment field and modify the Subject if necessary.

* Subject

* Comment

End of Process.