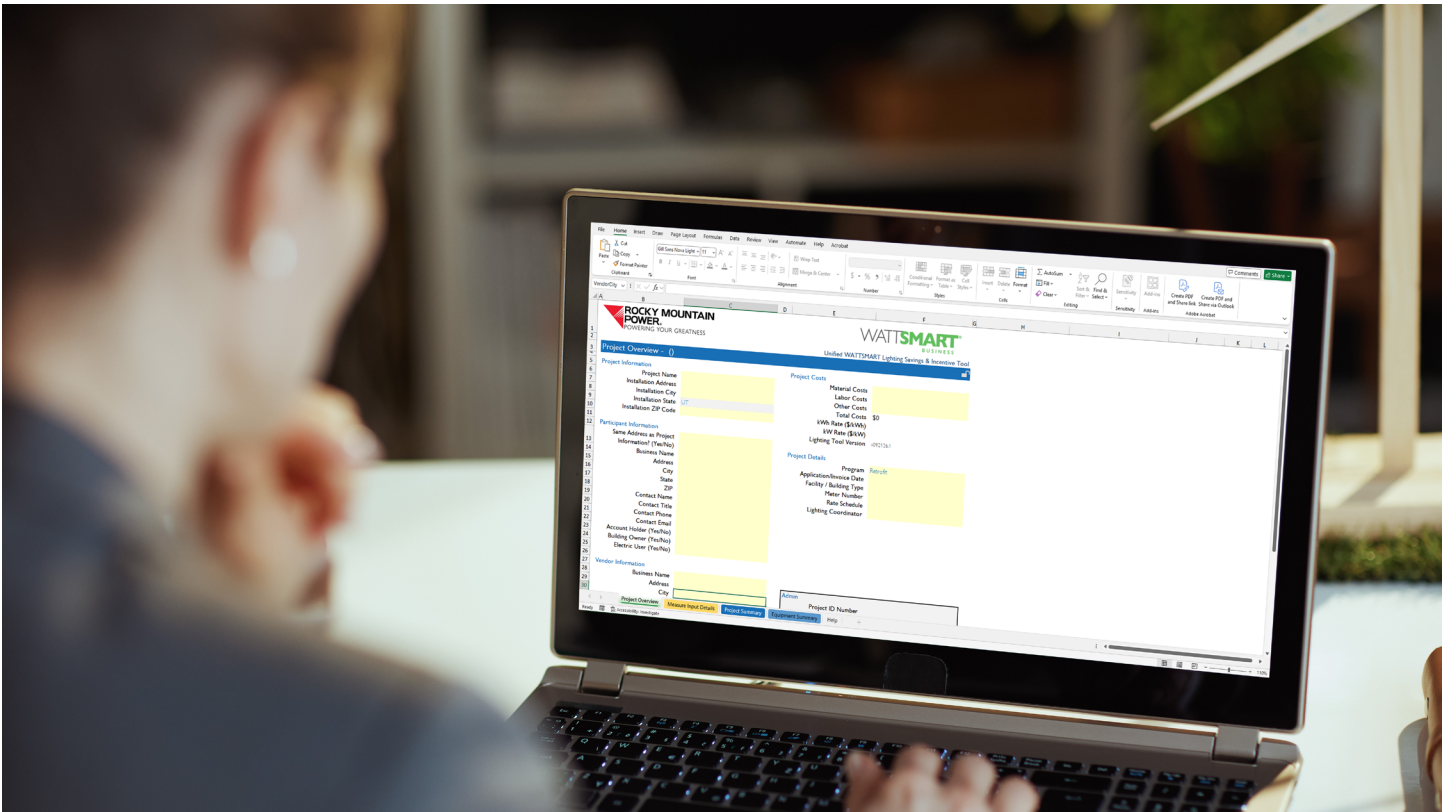


WATTSMART[®] UNIFIED TOOL

Quick start guide

A step-by-step guide for completing a lighting project in the Unified Tool.

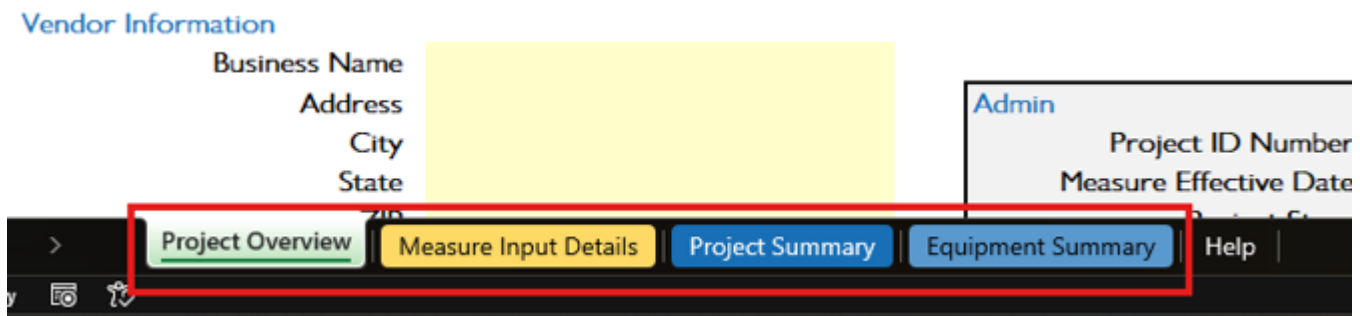


Before you begin

The Unified Tool combines multiple Wattsmart® lighting project calculators in one workbook. Users enter project and equipment information, review the calculated results, resolve warnings and generate project reports.

WHAT YOU WILL USE

Most users will work primarily in four visible tabs: Project Overview, Measure Input Details, Equipment Summary and Project Summary.



Recommended workflow



Information to gather

- Participant contact and installation information
- Trade ally or vendor information
- Application date, building type, space type and meter number
- Existing fixture type, lamp type, wattage, controls and quantity
- Proposed fixture or measure, proposed controls and product qualification status
- Material, labor and other project costs



IMPORTANT

Complete the Project Overview first. Information entered there is used throughout the workbook.

Complete the tool

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Unified WATTSMART Lighting Savings & Incentive Tool

Project Overview - ABC Warehouse ()

Project Information

Project Name: ABC Warehouse
Installation Address: 123 South 100 East
Installation City: Salt Lake City
Installation State: UT
Installation ZIP Code: 84111

Participant Information

Same Address as Project Information? (Yes/No): Yes
Business Name: 123 South 100 East
City: Salt Lake City
State: UT
ZIP: 84111
Contact Name: John Smith
Contact Title: Owner
Contact Phone: 801-456-7890
Contact Email: jsmith@abcwarehouse.com
Account Holder (Yes/No): Yes
Building Owner (Yes/No): No
Electric User (Yes/No): Yes

Vendor Information

Business Name: Warehouse Electric
Address: 123 South 100 East
City: Salt Lake City
State: UT
ZIP: 84111
Contact Name: Jane Doe
Contact Phone: 801-456-7890
Contact Email: jane@warehouseelectric.com

Project Costs

Material Costs: \$10,000
Labor Costs: \$10,000
Other Costs: \$0.000
Total Costs: \$20,000
10th Rate (\$/kW): 0.0021
40W Rate (\$/kW): \$1.000
Lighting Tool Version: 03/2021

Project Details

Program: Retrofit
Application/Invoice Date: 10/05/2026
Facility / Building Type: Warehouse
Meter Number: 123456789
Rate Schedule: UT23
Lighting Coordinator: [Empty]

Project ID Number: 10000000
Program Effective Date: 10/05/2026
Project Stage: [Empty]
Program Change (Status): [Empty]
Project Status: Ready for Review

Navigation: Project Overview | **Equipment Summary** | Project Summary | Help

1. COMPLETE PROJECT INFORMATION

On the Project Overview tab, enter the participant, installation address, vendor, project contact and project cost information. Include material, labor and other costs where applicable.

- Participant name, phone and email
- Installation address
- Trade ally or vendor information
- Project contact
- Material, labor and other costs

Project Details

Program: Retrofit
Application/Invoice Date: 10/05/2026
Facility / Building Type: Warehouse
Meter Number: 123456789
Rate Schedule: UT23
Lighting Coordinator: [Empty]

Navigation: Project Overview | **Equipment Summary** | Project Summary | Help

2. SELECT THE PROJECT PROGRAM

In Project Details, select the appropriate project type from the program drop-down.

- SMBE: use only when the vendor and customer meet applicable SMBE qualifications.
- Retrofit: use for existing-building lighting upgrades. The tool evaluates available retrofit pathways.
- New Construction / Major Renovation: use for new buildings, major renovations and code-based lighting projects.

Project Details

Program: Retrofit
Application/Invoice Date: 10/05/2026
Facility / Building Type: Warehouse
Meter Number: 123456789
Rate Schedule: UT23
Lighting Coordinator: [Empty]

Navigation: Project Overview | **Equipment Summary** | Project Summary | Help

3. ENTER PROJECT DETAILS

Complete the fields displayed for the selected project type.

- Retrofit: application date, space type, building type, meter number and other displayed fields.
- New Construction / Major Renovation: interior space type, exterior space type when applicable, building area (square footage).
- Operating hours are populated from deemed assumptions associated with the selected space type.

Project Overview - ()

Project Information

Project Name
Installation Address
Installation City
Installation State UT
Installation ZIP Code

Project Costs

Material Costs
Labor Costs
Other Costs
Total Costs \$0
kWh Rate (\$/kWh)
kW Rate (\$/kW)
Lighting Tool Version v092126.1

Participant Information

Same Address as Project Information? (Yes/No)
Business Name
Address
City
State
ZIP
Contact Name
Contact Title
Contact Phone
Contact Email
Account Holder (Yes/No)
Building Owner (Yes/No)
Electric User (Yes/No)

Project Details

Program Retrofit
Application/Invoice Date
Facility / Building Type
Meter Number
Rate Schedule
Lighting Coordinator

Vendor Information

Business Name

Enter measures and review results

4. ENTER EXISTING EQUIPMENT

On Measure Input Details, select the existing fixture category and the related fixture details. Enter the fixture quantity and existing controls, when applicable.

- Choose the existing fixture category first.
- Then select the fixture type, lamp type, lamp wattage and controls.
- If selections do not match, the tool highlights the mismatch for correction.

5. ENTER PROPOSED EQUIPMENT

Select the proposed LED fixture or measure, then select proposed controls, when applicable.

- Examples include interior LED, exterior LED, interior LED with plug-and-play controls, custom lighting and controls-only measures.
- Controls options may include basic controls, network lighting controls and luminaire-level lighting controls.

6. CONFIRM PRODUCT QUALIFICATION

Use the Qualified Product List (QPL) field to select Qualified, Not Qualified, Not Applicable or Exception Granted.

- A Not Qualified selection prevents the incentive from calculating and creates a warning.
- Not Applicable and Exception Granted allow the calculation to proceed.

7. REVIEW CALCULATED RESULTS

Review the summary area at the top of Measure Input Details.

- Estimated kWh savings
- Simple payback
- Incentive amount
- Selected program
- Pre-approval requirement

PROGRAM SELECTION

For Retrofit projects, the tool compares available pathways and selects the program with the higher total project incentive. Selection is made at the project level, not line by line.

Resolve warning and generate reports

8. Review the warning area

Before finalizing the project, review the warning area and correct any flagged items. Warnings may identify missing information, selection mismatches, QPL issues or an applied payback cap.

Warning or indicator	What to do
Red selection mismatch	Recheck the fixture category and related fixture, lamp, wattage or control selections.
QPL: Not Qualified	Confirm the product selection. A Not Qualified status will prevent the incentive from calculating.
Payback cap applied	Review project pricing and the affected measure lines.
Pre-approval required	Follow the current program pre-approval process before proceeding.

9. Review output tabs

Equipment Summary: Review the equipment listing and use it to support project documentation or bid takeoffs.

Project Summary: Review energy savings, incentive information, project performance and environmental information displayed by the tool.

10. Generate reports

Use the available report buttons to generate the project documentation:

- Print GA: generates the project's General Application output.
- Print Summary Report: generates a summary of project results.

The screenshot displays the WATTSMART BUSINESS software interface. At the top, the Rocky Mountain Power logo is on the left and the WATTSMART BUSINESS logo is on the right. Below the logos is a blue header bar labeled "Measure Input Details - 0".

The main content area is divided into several sections:

- Selected Program:** A dropdown menu showing "Retrofit".
- Total Incentive:** \$21,000.00.
- Simple Payback:** Single Payback w/o Incentive: 4.88 yrs; Simple Payback w/ Incentive: 1.47 yrs.
- Project Metrics:** Cost/kWh: \$0.40; Incentive/kWh: \$0.26.
- Project Totals:** kWh/yr Savings: 74,847; % Watt Reduction: 40%; Quantity Exis/Prop: 46 / 46.

On the right side, there are two buttons: "Print GA" and "Print Summary Report".

Below the main content area, there is a red box labeled "Warnings:" with the text "Line 1: 70% Cost Cap Applied.".

At the bottom, there is a section titled "Equipment Selection and Calculations" with a table. The table has columns for Line, Space Description, QPL Qualifications (Qualified / Not Qualified), Existing Fixture Category, Existing Lamp Type, Existing Lamp Length, Existing Lamp Wattage, Existing Lamp Count, Quantity (Existing), Existing Controls, Space W (Existing, Simulated), Proposed Equipment, and QPL Pro. The first row shows a "Glowtube" fixture, which is "Qualified", with a "Fluorescent" category, "T8 10" lamp type, 8" length, 40W wattage, 4 count, and 40 quantity. The proposed equipment is "175 Fluoresce - 110V/100W Reg - 110V/100W".

At the very bottom, there is a navigation bar with tabs: "Project Overview", "Measure Input Details", "Project Summary", "Equipment Summary", and "Help".

Final review checklist

- ☐ Project Overview is complete.
- ☐ Correct project type is selected.
- ☐ Building, space and meter information is complete.
- ☐ Existing fixture and controls selections match and no red mismatches remain.
- ☐ Proposed fixture and controls selections are complete.
- ☐ QPL status is confirmed for each applicable measure.
- ☐ Project costs and quantities are complete.
- ☐ Selected program and pre-approval indicator have been reviewed.
- ☐ Warnings have been resolved or documented.
- ☐ Equipment Summary and Project Summary have been reviewed.
- ☐ Required project reports have been generated.

NEED HELP?

Contact us by calling **385-300-0150**, emailing Wattsmart@evergreen.energy or navigating to our contact us page: <https://wattsmartbusiness.com/contacts/>