

## CASE STUDY

## A Leading Solar Provider Gains a Dynamic Filing Portfolio Management System, Designed to Deliver Decades of Value

### INTRODUCTION

#### A Market Leader Seeks Future Advantage

As a leader in the solar field, our client has delivered solar energy technology for a few decades. Working for homeowners, businesses, government and utilities, the company continually seeks to expand the limits of solar energy. From technological development to the design and production of PV equipment, the company seeks to deliver a better solar experience. That includes improving processes behind the scenes. As a provider (and financier) of PV equipment, our client must conduct large numbers of Uniform Commercial Code (UCC) and Notice of Independent Solar Producer (PUC) filings to protect its interests in that solar equipment. This means managing a huge volume of documentation, and tracking large quantities of orders across a multitude of jurisdictions. In this case study, you'll learn how the company teamed with Lien Solutions to bring clarity and consistency to the inherent complexity of large-scale filing management.

### SITUATION

#### Aligning With A Digital World

When this industry leader sought a partner to help manage their PUC filings portfolio, Lien Solutions was prepared with the comprehensive capabilities and responsive support the company required. The sheer volume and complexity of their filings called for a sophisticated but streamlined approach. Lien Solutions quickly migrated them onto a digital filing platform for new recordings, powered by our iLien document recording management technology. Our system provided them with an efficient way to manage both records and documents, with the ability to track submitted and recorded documents in real time. The success of the new system quickly highlighted a further need. After six months of working with our client to coordinate current and new recordings, it became clear that the company's archive of previous recordings needed to be brought into alignment with the new system.

*Lien Solutions brings clarity and consistency to the inherent complexity of large-scale filing management.*



## SOLUTION

### A Consultative Approach to a Tailored Solution

The company's legacy system for document management consisted of a static listing of recordings rather than a dynamic and fully searchable database. Because file numbers were embedded alongside other textual content, it was difficult to isolate and find files by number or name. Competing file and lease numbers assigned to the same record made it harder and confusing to accurately and quickly identify specific records. What's more, document records and the images of those PUC documents were kept in separate, unaligned databases. The ability to attach images to files is particularly important for the full and accurate tracking of real property records like PUCs. In short, our client faced a classic big data challenge. By teaming with Lien Solutions to solve it, the company got more than just a simple technology patch; they got a consultative partner who sat down with them to understand what kind of solution would be most valuable to them, and a clear pathway for achieving it. We reviewed the data, provided functionality to tag images to electronic records, and formatted the portfolio of documents into fully searchable form. In the process, we interfaced with the client's IT team to create a system that seamlessly aligned historical records with the approach we'd established for current PUC recordings.

## RESULTS

### The Benefits of a Proactive Platform

Uniform. Clear. Actionable. Our client has gained a dynamic catalogue of recordings that delineates key elements such as order number, debtor name, jurisdiction and filing type. Crucially, the system clearly tags order status. This not only provides essential visibility into the details of individual recordings, but also enables users to quickly generate a list of which orders are closed and which need more attention. What is especially valuable about the Lien Solutions approach is that we helped the company to identify its desired end-state and then used our industry and technological expertise to engineer a solution to match. As a result, our client is now able to store electronic document records and filing images together, can quickly determine which recordings have been successfully completed or not, and can actively track and report on recordings. That means a degree of proactive portfolio management that hadn't existing before – and a platform that will continue to empower this industry leader for years and decades to come.

### A FUTURE-READY SOLUTION

Preparing real property documents for recording is a time consuming and labor intensive process. Documents must first be prepared, signed by an authorized company representative and legally acknowledged by a notary before submission to the correct jurisdiction. Our client's original PUC process was based on manual document preparation, requiring them to sign and acknowledge documents, and then send the original live document to Lien Solutions. We would then submit the document to the jurisdictions and provide electronic tracking. Now, by employing the full functionality of Lien Solutions' iLienRED, our client can upload the necessary data and submit the document orders electronically. The tedious process of printing, signing and acknowledging stacks of documents is now handled quickly and efficiently by Lien Solutions. By moving to our digitally-supported solution, the entire PUC process is made more efficient, visible and manageable.

