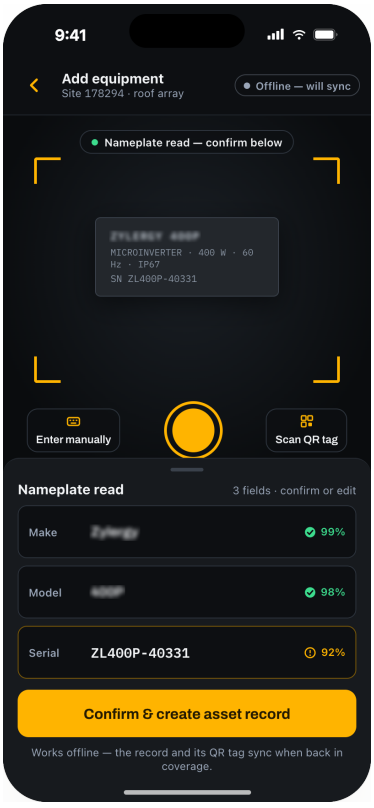
ZYLERGY

ADMIN GUIDE

Zylergy Solar

Admin Guide

For administrators who set up and run a Zylergy Solar account



SAMPLE DATA.

ZYLERGY

Zylergy, Inc.
Lewes, Delaware zylergy.com

ZY-SOL-ADG-01 Rev. A
Release 1.0 · October 2026

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Contact. Zylergy, Inc., 16192 Coastal Highway, Lewes, Delaware 19958 · hello@zylergy.com · zylergy.com

Revision history

REVISION	DATE	DESCRIPTION
A	October 2026	First issue for Release 1.0.

About this guide

Who this guide is for

This guide is for the administrator of a Zylergy Solar account at a solar installation or service company. The administrator manages users, roles and access grants, connects sites and vendor accounts, and maintains the settings, the pricebook and the plan catalog. The administrator also sets up integrations and looks after data, security and support access. In a small company, the administrator may also work in sales. This guide covers only the administrator's tasks. For daily work in the web console and the app, see the *Zylergy Solar Operator Guide*. If you are new to Zylergy Solar, start with the *Zylergy Solar Quick Start Guide*.

How this guide is organized

- Chapter 1, "Administration overview," describes the administrator's work and the order in which to set up an account.
- Chapter 2, "Account," covers your company's account and its details.
- Chapter 3, "Users, roles and access grants," covers inviting people, roles, access to equipment and subcontractor access.
- Chapter 4, "Connecting sites: authorization and telemetry," covers onboarding sites, homeowner authorization, the credential vault, backfill and how often telemetry is read.
- Chapter 5, "Detection and maintenance," covers the fault library, maintenance intervals and overrides, and warranty and contract dates.
- Chapter 6, "The Company Brain," covers asset records, sites, manuals and the learning loop.
- Chapter 7, "Pricebook, labor rates and plans," covers the prices behind each quote and the plans offered to homeowners.
- Chapters 8 to 12 cover integrations, data, privacy and security, audit and export, billing and subscription, and Zylergy support access.
- Appendix A, "Roles reference," lists what each role does.
- Appendix B, "Settings reference," lists the settings.
- The Glossary and the Index follow Appendix B.

Documentation set

DOCUMENT	NUMBER	FOR
Zylergy Solar Quick Start Guide	ZY-SOL-QSG-01	New users: first sign-in and a first job
Zylergy Solar Operator Guide	ZY-SOL-OPG-01	Everyday work in the app and the web console, and a reference for every screen
Zylergy Solar Admin Guide (this guide)	ZY-SOL-ADG-01	Administrators: account, users and roles, the Company Brain, integrations, data and security

Conventions

CONVENTION	MEANING	EXAMPLE
Bold	A label on the screen: a button, tab, menu item, field or status, written exactly as the screen shows it	Tap **Start the checklist**.
Monospace	A value you type or read: serial numbers, readings, codes, document numbers	Enter 118.
A > B	A path through menus or settings	**Menu** > **Offline & pack**
Italic	The title of another document, or a term at the point where it is defined	*Zylergy Solar Admin Guide*
Sample data.	Every screen in this guide shows sample data	Figure captions

Procedures are numbered steps. Do the steps in order. Each step is one action. Some procedures start with a **Before you begin** box that lists what must be ready first. Most end with a **Result** line that tells you what you see when the procedure worked. The line under a procedure title tells you who does the task and on which device.

This guide uses four kinds of notice:

> **⚠ WARNING**
>
> **Indicates a hazardous situation which, if not avoided, could result in death or serious injury.** A warning states the hazard, what can happen, and how to avoid it.

> **⚠ CAUTION**
>
> **Indicates a situation which, if not avoided, could result in minor or moderate injury, damage to equipment, or the loss or corruption of records.**

> NOTE
>
> Information that helps you complete the task or understand its result.

> TIP
>
> A faster or easier way to do something.

Send us your comments

To report an error or suggest an improvement to this guide, write to hello@zylergy.com. Include the document number (ZY-SOL-ADG-01), the revision (A) and the page number.

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1 CHAPTER 1

Administration overview

IN THIS CHAPTER

- What the administrator does 1
- Set up an account 2
- Prepare your team 3
- Routine administration 4
- Where settings live 4

Zylergy Solar reads the telemetry of your customers' solar systems and raises alerts for repair and maintenance work. Your company then quotes, plans, carries out, verifies and invoices that work. The *administrator* sets up and runs the account: gives people the access they need, connects each site with its homeowner's authorization, keeps prices and plans current, and connects your other systems.

1.1 What the administrator does

Administration is technical work, separate from back-office work. The administrator has the role **Admin**. In a small company, the person who works in sales may also hold **Admin**. This guide covers only the **Admin** tasks.

Table 1-1 Administrator and back office

AREA	ADMINISTRATOR	BACK OFFICE (SALES, SERVICE COORDINATOR)
People	Invites users, assigns roles and access grants, removes users.	Works with the access the administrator gives.

Sites and telemetry	Connects sites, requests homeowner authorization, manages vendor connections and revocation.	Sees the alerts for connected sites.
Settings	Maintains detection and maintenance settings, the pricebook, labor rates, tax and the plan catalog.	Uses them in repair packages, quotes and service-plan offers.
Manuals	Uploads and digitizes manuals and sets their sharing.	Uses manual pages in action plans.
Integrations	Works with Zylergy's engineers to connect BuildOps, other field-service platforms and distributor accounts.	Routes work orders and orders parts through them.
Security and support	Reviews audit records, exports data, approves Zylergy support access.	Not applicable.

You do all administration in the web console. Appendix B lists the settings.

1.2 Set up an account

Set up a new account in this order. Each step depends on the ones before it.

Table 1-2 Setup checklist

STEP	TASK	SEE
1	Check your company's details and the account's organization.	Chapter 2
2	Invite the people who will work in Zylergy Solar and assign their roles.	Chapter 3
3	Upload the manuals for the equipment you service, and set how they are shared.	Chapter 6
4	Set up the pricebook, labor rates, tax and the plan catalog.	Chapter 7
5	Connect BuildOps or another field-service platform, if you use one, and your distributor accounts, with your company's own credentials. Zylergy's engineers help during onboarding.	Chapter 8
6	Onboard your sites, single or in bulk, and collect each homeowner's authorization.	Chapter 4
7	Review the asset records created for each site.	"Backfill and the first data" on page 19

8	Review maintenance intervals, warranty dates and contract dates.	Chapter 5
9	Grant technicians and subcontractors access to the equipment they work on.	“Access grants” on page 11
10	Check the data-use terms in your customer agreement, and decide how support access is approved.	Chapter 9, Chapter 12

During setup, Zylergy customer success can help you onboard your sites, build your first quotes and schedules, and follow your first guided jobs. To arrange this, contact Zylergy support (Chapter 12).

1.3 Prepare your team

Before the first jobs, check that each person can work in Zylergy Solar.

Table 1-3 Readiness checklist

WHO	CHECK
Sales and service coordinators	They can sign in to the web console in a current version of Google Chrome, Microsoft Edge, Safari or Firefox, and see the **Overview** and the alert queue.
Sales	They know how to generate a repair package, call the homeowner and send the quote. See the *Zylergy Solar Quick Start Guide* (ZY-SOL-QSG-01).
Technicians	Each has an iPad or iPhone with iPadOS or iOS 26 or later and the Zylergy Solar app from the App Store, has signed in once with a signal, and has allowed camera access.
Technicians	Each has access grants for the equipment they will work on (“Access grants” on page 11).
Technicians	Each knows how to pack jobs for offline work before leaving for a site.
Subcontractors	They are added to your account and know that they will see only the equipment of the jobs routed to them (“Subcontractor access” on page 12).
Administrator	Manuals are uploaded for the equipment in your fleet, and the pricebook, labor rates and plan catalog are complete.

Start with a few sites before you onboard all of them. Run the first jobs from alert to invoice with the people who will do them. Then adjust the pricebook, the plan catalog and the access grants before you add the rest of your sites.

1.4 Routine administration

Table 1-4 Routine administration tasks

HOW OFTEN	TASK	SEE
As needed	Invite new people, change roles, remove people who leave.	Chapter 3
As needed	Onboard new sites and follow up on missing authorizations.	Chapter 4
As needed	Upload manuals for new equipment models in your fleet.	“Manuals” on page 26
Weekly	Check for sites whose authorization was revoked or whose data has stopped.	“Troubleshooting site connections” on page 20
Monthly	Review access grants and the audit records.	“Review access regularly” on page 12, “Review the audit records” on page 41
When prices change	Update the pricebook, labor rates and tax, or check that they synced from your field-service system.	Chapter 7
Each season	Review the plan catalog and maintenance intervals with sales.	“The plan catalog” on page 31, “Maintenance intervals” on page 23

1.5 Where settings live

Settings fall into three groups, by who they affect.

- **Personal settings** affect only one person. Each person changes their own device settings in the app (**Menu**, then their account) and their own settings in the web console.
- **Company settings** affect everyone in the account. Only an administrator changes them, in the web console.
- **Settings that Zylergy maintains** include the detection thresholds and the fault library. Zylergy calibrates them for your account and documents them for you (Chapter 5).

2 CHAPTER 2

Account

IN THIS CHAPTER

- Company details 5
- Organizations and people in several companies 6
- Isolation of your account 6
- Hand over administration 6
- Close the account 7

In Zylergy Solar, your company is the *installer*, and your account is its organization. It holds your company details, your people, your sites and the records for them. Each account is isolated. People in your account see only your company's sites, and no other installer can see them.

2.1 Company details

ADMINISTRATOR · WEB CONSOLE

Keep the company details in Table 2-1 current. Quotes, invoices and Zylergy's contact with your company depend on them.

Table 2-1 Company details

DETAIL	WHAT IT IS USED FOR
Company name and address	Shown on quotes, work orders and invoices.
Contact for the account	The person Zylergy contacts about the account.
Billing contact	Receives Zylergy's invoices for the platform (Chapter 11).
Time zone	Dates and times of alerts, visits and records.
Units and formats	Units, date and number formats.

Branding of quotes and invoices	The logo and text on documents sent to home-owners.
Tax	The tax applied to quotes and invoices (“Tax” on page 30).

2.2 Organizations and people in several companies

A person can belong to more than one organization, for example a subcontractor who works for several installers. When this person signs in to the web console, they choose the organization to work in. The console remembers the choice in that browser. In the app, they see the jobs that each installer routes to them.

2.3 Isolation of your account

Zylergy Solar keeps each installer’s account separate. People in your account see only your sites, alerts, quotes, work orders and records. Technicians and subcontractors see only the equipment they have been granted access to (“Access grants” on page 11). Manuals your company uploads are private to your company unless you choose otherwise (“How manuals are shared” on page 27).

2.4 Hand over administration

When someone new takes over administration, hand over the account before the current administrator leaves.

ADMINISTRATOR · WEB CONSOLE

1. Invite the new administrator, or open their existing user account.
2. Give them the **Admin** role (“Change a user’s roles or remove a user” on page 10).
3. Ask them to sign in.
4. Check that they can open the company settings.
5. Change the contact for the account and the billing contact if needed (“Company details” on page 5).
6. Remove **Admin** from the previous administrator, or remove that user.

RESULT

The new administrator manages the account. Each step is recorded in the audit records.

2.5 Close the account

Before you close your company's account, export the records you need to keep ("Export" on page 41). These include the service and compliance records of your sites and the payment status of your invoices. To close the account, contact Zylergy support (Chapter 12). Zylergy provides a full export of your company's data as CSV and PDF files. Zylergy then deletes its copies of the data and confirms the deletion in writing.

3 CHAPTER 3

Users, roles and access grants

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- Change a user's roles or remove a user 10
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- Troubleshooting users and access 13
- Who is a qualified person 13

Each person who works in Zylergy Solar has a user account with one or more *roles*. The role sets what the person can do. *Access grants* set which equipment technicians and subcontractors can work on.

3.1 Roles

Zylergy Solar sets access per user. There are four roles: **Admin**, **Back office**, **Field tech** and **Customer**. You assign the first three to the people in your company when you invite them, and you can change them later ("Change a user's roles or remove a user" on page 10). One person can hold more than one role. Homeowners hold **Customer** in the homeowner portal.

Table 3-1 Roles in Zylergy Solar

ROLE	JOB TITLES	WORKS IN	WHAT IT IS FOR
Admin	Administrator	Web console	Manages users and their roles, access grants, site authorization and vendor connections, settings, integrations, security and support access.

Back office	*Sales*, service coordinator, *dispatcher*	Web console	Works the alert queue, calls homeowners, builds and sends quotes, and offers service plans. Schedules visits, routes work orders to technicians or subcontractors, checks parts and issues invoices. In a small company, sales does all of this.
Field tech	*Technician*, or *subcontractor* with access grants	Zylergy Solar app	Carries out guided repairs and maintenance on the equipment their access grants cover, and adds equipment. A subcontractor carries out the jobs routed to them.
Customer	Homeowner	Homeowner portal	Sees their own system and its alerts, manages the authorization for their site and can share the site with an installer.

Homeowners are outside your company and do not use the web console or the app.

Appendix A lists what each role does.

Table 3-2 Who holds which role

COMPANY	TYPICAL ARRANGEMENT
A small installer	One or two people in the office do sales and scheduling with **Back office**. One of them also holds **Admin**. Technicians use the app with **Field tech**. Subcontractors are added for overflow work.
A larger installer	A sales team works the alert queue and quotes. A service coordinator or dispatcher schedules and routes the work. Both have **Back office**. A separate administrator holds **Admin**.
A solar service or operations and maintenance provider	The same setup at fleet scale, with more technicians, more access grants per contract, and route and capacity optimization.

3.2 Invite a user

ADMINISTRATOR · WEB CONSOLE

BEFORE YOU BEGIN

- You know the person's work email address and the roles they need.

1. Open the list of people in your account (the technician roster).
2. Start an invitation.

3. Enter the person's work email address.
4. Choose their roles from **Admin**, **Back office** and **Field tech**. A person can hold more than one.
5. For a **Field tech**, choose the equipment they can work on ("Access grants" on page 11).
6. Send the invitation.

RESULT

The person receives a join link at their work email. When they sign in for the first time, they have the roles and access you chose.

If your company uses single sign-on, users sign in on your company's sign-in page. Single sign-on works with identity providers that use SAML 2.0 or OpenID Connect.

If an invitation does not arrive, Zylergy support can resend it (Chapter 12).

3.3 Change a user's roles or remove a user

ADMINISTRATOR · WEB CONSOLE

1. Open the list of people in your account.
2. Select the person.
3. Choose what to do:
   a. To change what the person can do, add or remove a role, then save the change.
   b. To remove the person, remove their access to the account, then confirm the removal.

RESULT

The change takes effect for the person's next action in the web console or the app. The change is recorded with who made it and when (Chapter 10).

> NOTE
> Before you remove a technician, ask them to bring the app online so that any work saved on their device synchronizes.

3.4 Access grants

Technicians and subcontractors see only the equipment they are authorized for. You grant access at one of three levels.

Table 3-3 Levels of access grant

LEVEL	GRANTS ACCESS TO	USE IT FOR
Per asset	One piece of equipment, by its asset record.	A single job, or a subcontractor (“Subcontractor access” on page 12).
Per group	A group of equipment, for example a class of equipment such as one inverter family or all battery systems.	Technicians who specialize in a type of equipment.
Per contract	All equipment covered by a service contract.	Technicians who look after the sites of a set of service contracts.

A technician can open the manuals for a piece of equipment only if they are authorized for it (“Who can open a manual” on page 27). Grants and revocations are recorded (Chapter 10).

Table 3-4 Choosing the level of a grant

SITUATION	SUGGESTED GRANT
A technician services every system your company installed	Per group, for each class of equipment in your fleet.
A technician specializes in battery systems	Per group, for battery systems only.
A technician looks after the sites of your service contracts	Per contract, for each contract they cover.
A technician covers a single job outside their usual work	Per asset, for the equipment of that job. Revoke it after the job.
A subcontractor takes a job	Given automatically for the routed job’s equipment (“Subcontractor access” on page 12).

Grant or revoke access

ADMINISTRATOR · WEB CONSOLE

1. Open the technician in the list of people.
2. Open their access grants.
3. Choose what to do:

a. To grant access, choose the level (asset, group or contract) and the equipment, group or contract.
b. To revoke access, select the grant, then revoke it.

4 Save the changes.

RESULT

The technician sees the equipment you granted and no other equipment. A technician whose access is revoked no longer sees the equipment, its jobs or its manuals.

Review access regularly

Review access grants when people change jobs, leave the company or stop working with you, and at regular intervals.

ADMINISTRATOR · WEB CONSOLE

1 Open the list of people in your account.
2 For each technician, open their access grants.
3 Revoke grants they no longer need.
4 Remove people who no longer work with your company (“Change a user’s roles or remove a user” on page 10).
5 Check the audit records of grants made since your last review (Chapter 10).

RESULT

Each technician sees only the equipment they currently work on.

3.5 Subcontractor access

A subcontractor works with the **Field tech** role and access grants. When the back office routes a job to a subcontractor, Zylergy Solar grants the subcontractor access to the equipment for that job. The subcontractor carries out the guided repair and passes the verification gate in the Zylergy Solar app, as your own technicians do. The access covers that job only and is recorded.

3.6 Troubleshooting users and access

Table 3-5 Troubleshooting users and access

WHAT YOU SEE	WHY	WHAT TO DO
An invited person did not receive the join link	The email address is wrong, or the message was filtered.	Check the address and invite the person again. Zylergy support can resend invitations.
A person signs in but the app does not recognize the address	The address they entered differs from the one you invited.	Ask them to use the address on the invitation, or invite the address they use.
A technician cannot see a job assigned to them	They have no access grant for the job's equipment.	Grant access to the equipment, its group or its contract (“Grant or revoke access” on page 11).
A technician sees equipment they should not	A group or contract grant covers more than intended.	Review their grants and narrow them (“Review access regularly” on page 12).
A technician cannot open a manual	They are not authorized for the equipment, or the manual is not linked to it.	Check their grants and the manual's equipment (“Upload or digitize a manual” on page 26).
A user is locked out	The user account is locked.	Contact Zylergy support to unlock the user (Chapter 12).

3.7 Who is a qualified person

Zylergy Solar records who has access to which equipment. It does not decide who is qualified to work on photovoltaic arrays, inverters or battery systems. Grant access only to technicians and subcontractors who hold the qualifications, licenses and training that your company, the equipment manufacturer and the authority having jurisdiction require.

4

CHAPTER 4

Connecting sites: authorization and telemetry

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- When a homeowner changes 18
- When a homeowner shares a site with you 18
- The credential vault 19
- Backfill and the first data 19
- How often telemetry is read 19
- Inverter vendors and their monitoring systems 19
- Troubleshooting site connections 20

Zylergy Solar reads telemetry for a site only when the site's homeowner has authorized it.

4.1 How a site is connected

1. You onboard the site, alone or in a bulk onboarding of your existing sites.
2. The homeowner authorizes access to their inverter vendor account for that site, or you start the request and the homeowner consents.
3. The credentials for the vendor account are stored in the credential vault. Zylergy Solar loads the site's historical telemetry and fills in the asset records from the vendor's site data where it can.
4. Detection starts, and alerts for the site go to your alert queue.

4.2 Onboard a single site

ADMINISTRATOR · WEB CONSOLE · NEEDS A SIGNAL

BEFORE YOU BEGIN

- You know the homeowner's contact details and the site's address.
- The homeowner's inverter vendor is one that Zylergy Solar connects to ("Inverter vendors and their monitoring systems" on page 19).

1. Start a single-site onboarding.
2. Enter the homeowner and the site.
3. Link the homeowner's inverter vendor account for the site.
4. Send the authorization request to the homeowner, or let the homeowner authorize directly.
5. When the homeowner has authorized, check the asset records created from the vendor's site data.
6. Correct or complete any equipment that is missing or wrong.

RESULT

The site is connected. Zylergy Solar loads its historical telemetry and fills in its asset records where the vendor data allows. Detection starts, and alerts for the site go to your alert queue.

4.3 Onboard sites in bulk

Bulk onboarding brings your existing sites into Zylergy Solar in one pass.

ADMINISTRATOR · WEB CONSOLE · NEEDS A SIGNAL

1. Start a bulk onboarding.
2. Provide the list of sites with their homeowners and addresses.
3. Check the list for errors and duplicates.
4. Send the authorization requests to the homeowners.
5. Follow each site's authorization status until every homeowner has responded.

RESULT

Each site is connected once its homeowner authorizes access, and its alerts go to your alert queue. Sites without an authorization are not read.

4.4 Site authorization

A *site authorization* is a homeowner's permission for Zylergy Solar to read telemetry from their inverter vendor account for one site. Authorization is given one site at a time, by the homeowner or as consent to a request you start on their behalf.

The authorization record shows what the authorization covers. The homeowner, or you on the homeowner's behalf, can revoke it at any time. Each site keeps a consent record you can view. It shows when authorization was given, its scope, and when it was revoked.

Zylergy Solar reads a site only while its authorization is active. When an authorization is revoked, Zylergy Solar stops reading the site's telemetry and records the revocation.

Request authorization from a homeowner

ADMINISTRATOR · WEB CONSOLE · NEEDS A SIGNAL

BEFORE YOU BEGIN

- The site is onboarded ("Onboard a single site" on page 15 or "Onboard sites in bulk" on page 15).
- You have told the homeowner what the authorization is for.

1. Open the site.
2. Start an authorization request for the site.
3. Check the homeowner's contact details.
4. Send the request.

RESULT

The homeowner receives the request and authorizes access to their inverter vendor account for the site. When they do, the site's status changes and its historical telemetry starts to load.

Table 4-1 Explaining authorization to a homeowner

POINT	WHAT TO SAY
What it allows	Your installer can see how your system is performing and is told when something needs attention.
What it does not allow	Your installer does not see your vendor password.
One site at a time	The authorization covers this property only.
Revocable	You can revoke it at any time, and your installer then stops receiving your system's data.

View a site's authorization

ADMINISTRATOR · WEB CONSOLE

1. Open the site.
2. Open its authorization record.
3. Check the status, the scope and the dates.

RESULT

You see whether the site's authorization is active, what it covers, and its history.

Revoke a site's authorization

Revoke an authorization when the homeowner asks you to, or when your company stops serving the site.

ADMINISTRATOR · WEB CONSOLE

1. Open the site's authorization record.
2. Revoke the authorization.
3. Confirm the revocation.

RESULT

Zylergy Solar stops reading the site's telemetry, and no new telemetry alerts are raised for it. The revocation is recorded with who made it and when. The site's existing records stay in your account while the subscription is active.

4.5 The stages of a site

Table 4-2 The stages of a site

STAGE	WHAT IT MEANS	WHAT YOU DO
Onboarded, waiting for authorization	The site is in your account, but the homeowner has not authorized access. Zylergy Solar does not read its telemetry.	Follow up with the homeowner.
Authorized, loading history	The homeowner has authorized access. Zylergy Solar is loading the site's historical telemetry and filling in its asset records.	Check the asset records when they appear.

Monitored	Zylergy Solar reads the site's telemetry, and alerts for the site go to your alert queue.	Complete or correct the equipment, upload missing manuals and work the alerts.
Authorization revoked	Zylergy Solar no longer reads the site's telemetry. Its records stay in your account while the subscription is active.	Onboard the site again only with a new authorization.

4.6 When a homeowner changes

An authorization belongs to the homeowner who gave it. When a property is sold, or a homeowner asks you to stop, revoke the authorization ("Revoke a site's authorization" on page 17). To keep serving the site for a new homeowner, ask the new homeowner to authorize access to their own inverter vendor account, as for a new site.

4.7 When a homeowner shares a site with you

A homeowner can use **Share with my installer** in the homeowner portal to send their system's health report and details to your company. The site appears in your alert queue as a new alert, and your back office works it like any other alert.

To monitor the site after the first job, onboard it and collect the homeowner's authorization ("Onboard a single site" on page 15). Until the homeowner authorizes access, Zylergy Solar does not read the site's telemetry for your company.

Table 4-3 From a shared site to a monitored site

STEP	WHO	SEE
The homeowner shares the site	Homeowner	The *Zylergy Solar Operator Guide* (ZY-SOL-OPG-01), chapter "The homeowner portal"
The alert is quoted, scheduled and carried out	Back office and technician	The *Zylergy Solar Operator Guide*, chapters "Building and sending a quote," "Planning the job," "Guided repair on site" and "Closing the job"
The site is onboarded and the homeowner authorizes access	Administrator and homeowner	"Onboard a single site" on page 15

Zylergy Solar reads the site's telemetry, and its alerts go to your alert queue	Zylergy Solar	"How often telemetry is read" on page 19

4.8 The credential vault

Zylergy Solar stores the credentials and access tokens for each homeowner's inverter vendor account in the *credential vault*, encrypted. No one in your company can see them. They are not shown in plain text and are not written to logs. Each access to a stored credential is recorded.

You do not handle the homeowner's vendor password. The homeowner authorizes access, and Zylergy Solar stores what it needs to read the telemetry.

4.9 Backfill and the first data

When a site is authorized, Zylergy Solar loads its historical telemetry. This is the backfill. After that, Zylergy Solar reads new telemetry from the vendor's platform every hour or at longer intervals ("How often telemetry is read" on page 19). Asset records are filled in from the vendor's site data where it is available. Zylergy Solar can also infer the equipment and site configuration from the telemetry. Inferred values are proposals until a person confirms them. See the *Zylergy Solar Operator Guide* (ZY-SOL-OPG-01), chapter "Adding equipment."

Zylergy Solar checks the telemetry it receives and flags gaps, stale feeds and malformed records.

4.10 How often telemetry is read

Alerts for a site start with the first reading after the site is connected. Zylergy Solar reads each vendor's platform every hour or at longer intervals. This keeps the cost of the vendors' APIs down. Zylergy calibrates the detection thresholds and the fault library on real data and documents them for your account ("The fault library" on page 21).

4.11 Inverter vendors and their monitoring systems

Zylergy Solar connects to inverter vendors' monitoring systems. You connect each vendor's system through the connector Zylergy provides, with your company's own API key. One installer can have sites from several vendors, and all of them feed one alert queue. The web console and the app handle these sites alike.

Ask Zylergy support which inverter and battery platforms Zylergy Solar connects to. Your inverter vendor's terms for data use apply in addition to the homeowner's authorization.

4.12 Troubleshooting site connections

Table 4-4 Troubleshooting site connections

WHAT YOU SEE	WHY	WHAT TO DO
A homeowner has not authorized a site	The homeowner did not receive or did not act on the request.	Contact the homeowner and send the request again.
An authorized site raises no alerts	Nothing has been detected, or the site has not been read since it was connected.	Check the site's stage ("The stages of a site" on page 17).
A site stopped producing new data	The vendor feed has a gap or has stopped, or the authorization was revoked.	Check the site's authorization. If it is active, contact Zylergy support (Chapter 12).
Equipment from the vendor's site data is incomplete	The vendor's data does not include every piece of equipment.	Ask a technician to add the missing equipment from its nameplate.
A homeowner's inverter vendor is not listed	Zylergy Solar does not connect to that vendor's system.	See "Inverter vendors and their monitoring systems" on page 19. Technicians can still add the site's equipment, but no telemetry alerts are raised without a connection to the vendor's system.

5 CHAPTER 5

Detection and maintenance

IN THIS CHAPTER

- The fault library 21
- Maintenance intervals 23
- Warranty and contract dates 24

Zylergy Solar raises alerts from two sources: detection on telemetry, and dates (maintenance intervals, warranties and contracts).

5.1 The fault library

Detection uses a defined fault library for the equipment in your fleet. Each detection produces one diagnosis: the fault type, the affected component, the level (**Critical** or **Warning**), how confident the detection is, and the recommended action with its time window.

Table 5-1 The fault library

FAULT	WHAT IT IS BASED ON
Capacitor degradation	Trends in the equipment's own diagnostics, with a projection of the component's remaining useful life.
Panel dropout	Output from part of the array falls away compared with the rest.
Soiling and shading decline	Gradual loss of output against what the site and season should produce.
Water intrusion	A water-intrusion fault in the equipment's data.
Silent equipment	Equipment that normally reports has stopped reporting.

Vendor notices	Failure notices from your inverter vendor's system, translated into alerts.

Zylergy calibrates the levels and thresholds of each fault on real data, documents them and can tune them. To ask for a change, contact Zylergy support ("Ask for a change to detection" on page 22).

How a detection becomes an alert

1. Telemetry arrives from your inverter vendor's system for an authorized site and is checked for gaps, stale feeds and malformed records.
2. Detection runs on each kind of data: the equipment's diagnostics, its production and whether it reports at all, and the vendor's own failure notices.
3. Each finding becomes a diagnosis with its fault type, affected component, level, confidence and recommended action window.
4. The finding is raised as an alert in your alert queue, ready to be packaged and quoted.

Ask for a change to detection

If alerts of one kind are too frequent or arrive too late for your business, ask Zylergy to review the thresholds for your account.

ADMINISTRATOR · WEB CONSOLE

1. Note the alerts concerned: their Site IDs, the fault and the level.
2. Note what happened at each site: whether the problem was confirmed on the visit.
3. Send these examples to Zylergy support (Chapter 12).

RESULT

Zylergy reviews the calibration and tells you about any change to the thresholds for your account.

Remaining useful life and proactive alerts

For components that wear out, Zylergy Solar projects the *remaining useful life* of each device and each degrading component. The projection comes from failure history across the installed base and improves as that history grows. Zylergy Solar raises an alert before the projected failure. Your company can then offer the work before the system loses production.

The learning loop and detection

Verified outcomes of completed jobs update detection, repair packages, intervals and stock recommendations. Photos and verified outcomes are also used to fine-tune Zylergy's vision models ("The learning loop" on page 28). Each update is versioned and monitored, and it can be reversed.

5.2 Maintenance intervals

Zylergy Solar takes the maintenance scope and intervals for each type of equipment from the manufacturer's manuals you upload (Chapter 6), for example panel cleaning and an annual inspection. When a task falls due at a site, Zylergy Solar raises an alert. It also refines the intervals from the failure history across the installed base. A refined interval differs from the manufacturer's baseline only where the data supports it. Each change is recorded.

Table 5-2 Examples of interval tasks

TASK	WHERE THE INTERVAL COMES FROM	CAN BE REFINED OR OVERRIDDEN
Panel cleaning	The manufacturer's documentation for the panels	Yes
Annual inspection	The manufacturer's documentation for the system	Yes
Other tasks the manuals specify	The manufacturer's documentation for each type of equipment	Yes

Override an interval

You can override an interval when your company's practice or local conditions call for a different schedule. Zylergy can also override intervals.

ADMINISTRATOR · WEB CONSOLE

1. Open the maintenance intervals for the type of equipment.
2. Select the task.
3. Enter the new interval.
4. Save the override.

RESULT

Zylergy Solar raises the task's alerts on the new schedule. The override is recorded with who made it and when. It stays in place when Zylergy Solar refines the baseline.

5.3 Warranty and contract dates

Zylergy Solar raises **Contract** alerts when a warranty is about to expire and when a service contract renewal is due. Contract dates come from the service contracts your back office creates when a homeowner takes a service plan.

Table 5-3 Sources of date-based alerts

ALERT	COMES FROM	LEVEL
Maintenance task due	The intervals in the manufacturer's documentation, refined by analytics, or your override	As fits the task
Warranty expires	The equipment's warranty date	**Contract**
Service contract renewal due	The service contract's renewal date	**Contract**

6 CHAPTER 6

The Company Brain

IN THIS CHAPTER

- Asset records and sites 25
- Manuals 26
- The learning loop 28

The *Company Brain* is the knowledge your company keeps in Zylergy Solar. It holds the asset records of the equipment you service, the manuals and instructions for that equipment, and the history of each job. Roles and access grants control who sees what. Zylergy Solar uses the Company Brain for alerts, repair packages, guided repairs and stock recommendations. In the product, you find it on the asset record of each piece of equipment.

6.1 Asset records and sites

A *site* groups the equipment at one homeowner's property, with its location and install date. Each piece of equipment at a site has an *asset record*.

Table 6-1 What an asset record holds

CONTENT	WHERE IT COMES FROM
Identity: make, model, serial number, location, homeowner	Nameplate capture, manual entry, the vendor's site data or telemetry inference, confirmed by a person
Specifications	The equipment catalog and the manuals
Manuals, repair instructions and maintenance procedures	The manuals your company uploads ("Manuals" on page 26)
Maintenance intervals	Extracted from the manuals, refined by analytics, or overridden ("Maintenance intervals" on page 23)

Signed quotes	Each quote the homeowner signs
Service history	The service log: alerts, inspections, verified repairs with their outcomes, cleaning and commissioning
QR tag	Registered by a technician. Scanning it opens the record.

The service log is append-only: entries cannot be edited or deleted. You can export the service and compliance record of each asset (Chapter 10).

Technicians create and correct asset records on site. See the *Zylergy Solar Operator Guide* (ZY-SOL-OPG-01), chapter “Adding equipment.” Records created from vendor data and telemetry are described in “Backfill and the first data” on page 19.

Keep asset records accurate

Repair packages, guided repairs and stock recommendations are built from the asset records. To keep the records accurate:

- Ask technicians to confirm or correct the equipment from its nameplates on their first visit to each site.
- Register QR tags on equipment that is hard to reach or whose nameplate is worn.
- When a technician replaces equipment, make sure the new serial number is recorded.
- Review the asset records created from vendor data and telemetry for each new site.

6.2 Manuals

Action plans, guided repair steps and maintenance intervals all come from the manuals. Upload the manufacturer’s manuals for the equipment you service before you connect your sites.

Upload or digitize a manual

ADMINISTRATOR · WEB CONSOLE

BEFORE YOU BEGIN

- You have the manual as a file, or on paper to scan.
- You are entitled to use the manual in your company.

1. Open the manuals for your account.
2. Start an upload.

3 Choose the file, or scan the paper manual.
4 Choose the equipment the manual covers.
5 Choose how the manual is shared (“How manuals are shared” on page 27).
6 Upload the manual.

RESULT

The manual is added. It is private to your company by default. Zylergy Solar digitizes paper manuals with text recognition. It extracts the maintenance scope, intervals and repair instructions for use in repair packages and guided repairs.

> NOTE
> Before your team relies on a new manual, check the intervals and repair steps extracted from it against the manual. Each action plan step keeps a reference to its manual page, so anyone can check it.

How manuals are shared

Each manual has its own authorization policy. A manual you upload is private to your company by default. Other companies can reuse it only where copyright and the manual’s authorization policy permit.

Only technicians who are authorized for a piece of equipment can open its manuals (“Access grants” on page 11). Each time a manual is opened, the access is recorded (Chapter 10).

Who can open a manual

A technician or subcontractor can open the manuals of the equipment they are authorized for, and no others. The back office uses manual pages in repair packages. Homeowners do not see manuals.

Prepare your manuals

Table 6-2 Manual checklist

CHECK	WHY
You have a manual for every model of inverter, panel and storage in your fleet	Repair packages and guided repairs are built from the manuals. Without one, the package has no steps for that equipment.
Each manual is the current revision from the manufacturer	Steps and intervals come from the manual.
Scans of paper manuals are complete and legible	Text recognition can only extract what it can read.

Each manual is linked to the right equipment	The action plan refers to pages of the manual linked to the site's equipment.
The sharing policy matches your rights to the manual	A manual you are not entitled to share must stay private.

Who sees what

Table 6-3 Who sees which parts of the Company Brain

CONTENT	BACK OFFICE	FIELD TECH	HOMEOWNERS
Asset records and service history	All sites in your account	Only equipment they are granted	Their own site, in the homeowner portal
Manuals	Pages used in repair packages	Only manuals of equipment they are granted	No
Proof of fix and outcomes	Yes	For their own jobs	No

The back office sees signed quotes on the site's records. Technicians and subcontractors see them on the asset records of the equipment they are granted.

6.3 The learning loop

A verified job records what was diagnosed, what was done, which parts were used and whether the fix held. Zylergy Solar uses these outcomes to improve detection, repair packages, pricing guidance, maintenance intervals, remaining useful life projections and the forecast behind stock recommendations.

- Each update is versioned and attributable. It is monitored for drift and can be reversed.
- Photos and verified outcomes from the field are used to fine-tune Zylergy's vision models. Your customer agreement sets the terms for how your company's data is used. The lineage from each outcome to the update can be audited ("Model training and data use" on page 37).

7

CHAPTER 7

Pricebook, labor rates and plans

IN THIS CHAPTER

- The pricebook 29
- Labor rates 30
- Tax 30
- How a quote is calculated 30
- Pricing guidance 30
- Sync prices from your field-service or ERP system 31
- The plan catalog 31
- Troubleshooting prices and plans 32

Repair packages are priced from your company's pricebook and labor rates. Service plans come from your plan catalog. Keep both current, because the quote is a fixed, upfront price. The homeowner gets that price before the visit. That price holds unless the technician finds something unusual on site that the telemetry could not show.

7.1 The pricebook

The pricebook holds your company's prices for parts and tasks. Zylergy Solar uses it to price the bill of materials and the tasks in each repair package.

ADMINISTRATOR · WEB CONSOLE

1. Open the pricebook.
2. Find the part or task.
3. Enter the new price.
4. Save the change.

RESULT

New repair packages use the new price.

7.2 Labor rates

Labor rates price the labor lines of each repair package. The rate that applies is shown in the labor section of the repair package.

7.3 Tax

Quotes and invoices show a tax line, calculated from your tax setting. Keep the setting in line with your jurisdiction.

7.4 How a quote is calculated

Table 7-1 How a quote's total is built

LINE	CALCULATION	SOURCE
Part line total	Quantity × unit price	Pricebook
Parts subtotal	Sum of the part line totals	Repair package
Labor line total	Hours × labor rate	Labor rates
Labor subtotal	Sum of the labor line totals, with the total hours	Repair package
Tax	As set for your account	Tax setting
Total	Parts subtotal + labor subtotal + tax	Quote summary

The back office can change quantities and hours, and adjust the scope or the price, before a quote is sent. The totals update with each change.

7.5 Pricing guidance

For faults with enough history, Zylergy Solar can suggest prices based on labor and parts outcomes across the installed base. The repair package shows the guidance as a suggestion. The back office can override it on the quote. Your pricebook and labor rates remain the basis of each quote.

7.6 Sync prices from your field-service or ERP system

If your company keeps its pricebook and labor rates in BuildOps or another field-service or ERP system, Zylergy Solar can sync them from that system. Quotes are then priced against your system of record. Set up the connection as described in Chapter 8. When sync is on, change prices in your system of record.

7.7 The plan catalog

The plan catalog holds the service plans your company offers homeowners, with the tiers, what each covers and their prices. The back office offers plans from the catalog at the end of each job, so the whole team offers the same plans.

Table 7-2 What to decide for each tier

DECISION	EXAMPLES
Name	A short name the homeowner understands.
What it covers	Monitoring and alerts, priority scheduling, an annual inspection, panel cleaning, or parts and labor for covered repairs.
Price and term	The price and the period it covers.
How it builds on other tiers	A higher tier that includes everything in the tier below it, plus more.

You build the catalog from templates, or the assistant drafts tiers for you.

ADMINISTRATOR · WEB CONSOLE

1. Open the plan catalog.
2. Create a tier from a template, or let the assistant draft one.
3. Enter what the tier covers.
4. Enter the price.
5. Save the tier.

RESULT

The back office offers the tiers at close-out. Service contracts record the tier the homeowner chose.

Review any text the assistant drafts before the back office offers it. The tiers in the figures of the Operator Guide are sample tiers.

7.8 Troubleshooting prices and plans

Table 7-3 Troubleshooting prices and plans

WHAT YOU SEE	WHY	WHAT TO DO
A repair package shows no price for a part	The part is not in the pricebook.	Add the part to the pricebook, then generate the package again.
Labor is priced at the wrong rate	The labor rate is out of date.	Update the labor rate (“Labor rates” on page 30).
Prices changed in your field-service system do not appear	Price sync is off or the connection is not working.	Check the integration (“BuildOps” on page 34).
The back office cannot offer a plan at close-out	The plan catalog has no tiers.	Create the tiers (“The plan catalog” on page 31).
Tax on a quote is wrong	The tax setting does not match your jurisdiction.	Correct the tax setting (“Tax” on page 30) and ask sales to adjust the quote before sending it.

8 CHAPTER 8

Integrations

IN THIS CHAPTER

- BuildOps 34
- Other field-service platforms 35
- Distributors 35
- Troubleshooting integrations 35

Zylergy Solar connects to BuildOps, to inverter vendors' monitoring systems and to your distributors. Zylergy provides each connector. You connect it in the web console with your company's own API keys or credentials, and Zylergy's engineers help during onboarding. You pay for the vendors' APIs, either through your subscription or directly to the vendor.

Table 8-1 Integrations

INTEGRATION	WHAT IT DOES	SETUP
BuildOps	Sends work orders and schedules to BuildOps, brings status changes back, and syncs the pricebook and labor rates.	"BuildOps" on page 34
Other field-service platforms	The same as BuildOps.	"Other field-service platforms" on page 35
Inverter vendors' systems	Reads telemetry for authorized sites.	Chapter 4
Distributors	Sends a job's bill of materials to a distributor as an order on your company's account.	"Distributors" on page 35
Electronic signature	Captures the homeowner's signature on a quote.	Not applicable

Table 8-2 What each integration needs

INTEGRATION	YOU NEED
BuildOps	Administrator access to your company's BuildOps account, and a decision on what to sync.
Other field-service platforms	Administrator access to the platform.
Distributors	An account with the distributor, and its ordering terms for your company.
Inverter vendors	A homeowner's authorization for each site ("Site authorization" on page 16).

8.1 BuildOps

Zylergy Solar connects to BuildOps. If your company uses BuildOps as its field-service system, connect it with your company's own credentials. With the connection in place:

- Work orders and schedules created in Zylergy Solar are sent to BuildOps.
- Status changes made in BuildOps come back into Zylergy Solar and show in the alert queue and on the work order.
- The pricebook and labor rates sync from BuildOps ("Sync prices from your field-service or ERP system" on page 31).
- If BuildOps cannot be reached, the back office prints the work order or saves it as a PDF.

Zylergy Solar also keeps its own copy of the work orders and schedules it sends.

Before you connect BuildOps, decide where your company manages schedules and prices. If BuildOps is your system of record, make schedule and price changes in BuildOps, and they flow into Zylergy Solar.

ADMINISTRATOR · WEB CONSOLE

BEFORE YOU BEGIN

- Zylergy has provided the BuildOps connector for your company.
- You have administrator access to your company's BuildOps account.

1. Open the integrations for your account.
2. Open the BuildOps connection.
3. Authorize Zylergy Solar to connect to your BuildOps account.
4. Choose what to sync: work orders and schedules, status, pricebook and labor rates.
5. Save the connection.

6 Test the connection.

RESULT

New work orders are sent to BuildOps, and status changes from BuildOps appear in Zylergy Solar.

Credentials for BuildOps are kept in the credential vault (“The credential vault” on page 19).

8.2 Other field-service platforms

Zylergy’s engineers can also connect other field-service platforms, with two-way sync as for BuildOps. Ask Zylergy support which platforms can be connected.

8.3 Distributors

If your company orders parts from a distributor, Zylergy’s engineers can connect your distributor account. The back office can then order a job’s bill of materials from the distributor directly. Orders use your company’s own account and terms. Your company is the buyer, and Zylergy Solar only passes the order to the distributor. Connections use the distributor’s ordering interface, electronic data interchange or punchout.

Without a distributor connection, the back office exports the bill of materials for your own ordering.

8.4 Troubleshooting integrations

Table 8-3 Troubleshooting integrations

WHAT YOU SEE	WHY	WHAT TO DO
Work orders do not appear in BuildOps	The connection was never completed, or its authorization has expired.	Open the integration and connect again. Meanwhile, the back office prints work orders or saves them as PDFs.
Status changes in BuildOps do not appear in Zylergy Solar	Status sync is off.	Turn on status sync in the integration settings.
A distributor order fails	Your distributor account is not connected, or the part is not available from the distributor.	Check the distributor connection, or export the bill of materials to your own ordering.
A homeowner cannot sign a quote	The electronic signature service is not reachable or not set up.	Contact Zylergy support.

9 CHAPTER 9

Data, privacy and security

IN THIS CHAPTER

- Homeowner authorization and minimal collection 36
- Encryption and credential handling 37
- Isolation and access 37
- Model training and data use 37
- Data on devices 37
- Your company's part in security 38
- Retention 38
- Privacy questions from homeowners 39
- Homeowner-facing text 39

Zylergy Solar handles homeowners' telemetry, their vendor account credentials and their contact details, as well as your company's records.

9.1 Homeowner authorization and minimal collection

Zylergy Solar collects and processes homeowner data only under the homeowner's explicit, revocable authorization, one site at a time ("Site authorization" on page 16). Collection is limited to what the product needs to detect problems, plan and verify the work, and keep the site's records.

9.2 Encryption and credential handling

- Homeowner credentials and telemetry are encrypted in transit and at rest.
- Credentials and access tokens for inverter vendor accounts and other systems are kept in the credential vault (“The credential vault” on page 19). No one in your company can see them. They are not shown in plain text and are not written to logs.
- Each access to a stored credential is recorded.
- People and services get only the access they need (least privilege), and access is audited.

9.3 Isolation and access

Your account is isolated from other installers’ accounts (“Isolation of your account” on page 6). Inside your account, technicians and subcontractors see only the equipment they are authorized for (“Access grants” on page 11), and manuals are private to your company unless their authorization policy allows reuse (“How manuals are shared” on page 27).

9.4 Model training and data use

Photos and verified outcomes from the field are used to fine-tune Zylergy’s vision models. The setting **Help our vision models to become better at detecting parts** is on by default and applies to your whole company. Only the **Admin** role can change it in the app’s settings. Zylergy recommends leaving it on. Technicians do not see the setting. Verified outcomes from your jobs also improve detection, repair packages, intervals and stock recommendations, for other installers as well as for you. The lineage from each outcome to the model update it contributed to can be audited.

Your customer agreement sets the terms for how your company’s data is used. It includes the *data-use authorization*, which covers the use of your outcomes to improve the product for other installers.

9.5 Data on devices

The app stores the jobs assigned to a technician, the manual pages they need and the proof they capture, so that work continues without a signal. Work recorded offline is sent when the device is back online.

If a device is lost or stolen

ADMINISTRATOR · WEB CONSOLE

1. Ask the technician whether the device held work that had not synchronized.
2. Remove the technician's access to the account, or revoke their access grants, until they have a new device ("Change a user's roles or remove a user" on page 10).
3. Check the audit records for activity from the technician's account since the device was lost (Chapter 10).
4. When the technician has a new device, restore their access.
5. Ask the technician to sign in on the new device.

RESULT

No one can use the lost device to work in your account.

9.6 Your company's part in security

Use this checklist for the people and devices in your company that use Zylergy Solar.

Table 9-1 Security checklist for your company

CHECK	WHY
Each person has their own user account	Actions are recorded per person.
People who leave are removed the day they leave	Their access ends with their employment.
Technicians' iPads and iPhones have a passcode or Face ID	Jobs, homeowner details and photos are stored on the device for offline work.
Access grants are as narrow as the work allows	Technicians see only the equipment they need.
Homeowner contact details are used only for their service	Homeowners authorized access for the service of their system.
Audit records are reviewed regularly	You see unexpected access early ("Review the audit records" on page 41).

9.7 Retention

Zylergy Solar keeps your company's data while the subscription is active. When your company closes its account, it receives a full export, and Zylergy then deletes its copies ("Close the account" on page 7).

9.8 Privacy questions from homeowners

Table 9-2 Common privacy questions

QUESTION	ANSWER
What does my installer see?	The telemetry of your system and the alerts raised from it, your contact details and the equipment at your site.
Does my installer get my vendor password?	No. Credentials are kept encrypted in a vault and are never shown to your installer.
Can I stop it?	Yes. You can revoke the authorization for your site at any time, and Zylergy Solar then stops reading your system's telemetry.
Is my data shared with other companies?	Your installer's account is isolated from other installers. Photos and verified outcomes of jobs are used to fine-tune Zylergy's vision models. Your installer's customer agreement with Zylergy sets the terms for how this data is used.
How long is my data kept?	While your installer's Zylergy Solar subscription is active.

9.9 Homeowner-facing text

The homeowner portal describes how a homeowner's system is performing and what happens next. It does not assess electrical safety. Your back office must not present portal text or alerts to homeowners as a statement that their system is safe.

10 CHAPTER 10

Audit and export

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Zylergy Solar records actions that affect privacy, security and the quality of your work. You can export the records you need.

10.1 What is recorded

Table 10-1 What Zylergy Solar records

EVENT	WHAT THE RECORD SHOWS
Site authorization granted, changed or revoked	The site, the scope, who acted and when. Each authorized site keeps a viewable consent record.
Access to a stored credential	Which credential, when, and by which service.
Access grant given or revoked	The person, the equipment, group or contract, who granted or revoked it, and when.
Role changed, user invited or removed	The person, the change, who made it and when.
Manual opened	The manual, the person and when.
Maintenance interval overridden	The task, the new interval, who changed it and when.
Verification gate passed	The job, the proof of fix, the outcome written to the service log, and the quality score.
Model updated from learning across customers	The lineage from the outcomes to the update.

Zylergy support acting in your account	Each change, attributed to Zylergy support (Chapter 12).

10.2 Review the audit records

Review the audit records regularly, for example once a month.

ADMINISTRATOR · WEB CONSOLE

1. Open the audit records for your account.
2. Check the access grants given and revoked since your last review.
3. Check role changes and new or removed users.
4. Check site authorizations granted and revoked.
5. Check any changes made by Zylergy support.

RESULT

You know who was given access to what, which sites were connected or disconnected, and what support changed.

10.3 Export

Table 10-2 What you can export

EXPORT	CONTENTS	WHO
Payment status	The invoices for verified jobs and whether each has been paid.	Service coordinator or sales
Bill of materials	The parts and quantities for a job, for your own ordering.	Service coordinator or sales
Service and compliance record	The complete service and compliance record of an asset: its service log, verified outcomes, proof of fix and quality scores.	Administrator
Work orders	A work order as a printout or PDF.	Service coordinator or sales

Exports are CSV or PDF files. For a full export of your company's data when it leaves Zylergy Solar, see "Close the account" on page 7.

Export an asset’s service and compliance record

ADMINISTRATOR · WEB CONSOLE

1. Open the site.
2. Select the piece of equipment.
3. Open its service and compliance record.
4. Export the record.

RESULT

The exported record holds the equipment’s complete service history and verified outcomes.

11 CHAPTER 11

Billing and subscription

Zylergy bills your company for the use of Zylergy Solar. The billing contact for your account receives Zylergy's invoices ("Company details" on page 5).

Zylergy Solar does not process payments from homeowners. Your company invoices homeowners from Zylergy Solar and collects payment outside it (Table 10-2). Zylergy Solar does not buy or resell parts. Your company orders parts from its own suppliers, including through a connected distributor ("Distributors" on page 35).

12 CHAPTER 12

Zylergy support access

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Zylergy support can help with your account. For example, support can resend an invitation, unlock a user, change a role or run a failed telemetry import again. Support staff can view your account. They act on your behalf only with your consent, and their actions are recorded and visible to you.

Contact Zylergy support in the app under **Menu** > **Help**, or by email at support@zylergy.com. Support is available Monday through Friday, 8 a.m. to 6 p.m. US Central time.

12.1 How support access works

Table 12-1 Support access

MODE	WHAT SUPPORT CAN DO	WHAT IS REQUIRED
Read-only view	See your account as you see it, to understand a problem. Export is turned off.	Support staff assigned to your account.
Acting on your behalf	Make changes in your account, such as fixing a role.	Your administrator's consent, given in the product or recorded with a support ticket. Sensitive changes also need the approval of a Zylergy support lead. The session is limited in time.

Each change that support makes on your behalf appears in your account's history. The entry names Zylergy support and gives the consent reference. Support staff can work only in the accounts assigned to them.

12.2 What support can do

Table 12-2 Support actions

ACTION
View your account read-only. Export is turned off.
Resend an invitation
Unlock a user
Reset multi-factor sign-in, where your users have it
Change a user's role
Re-run a failed telemetry import
Rebuild the data stored on a user's device for offline use
Refresh a distributor connection
Send notifications again

Support needs your consent to change a user's role. A read-only view of your account does not need your consent.

Each action records the support case it belongs to. Actions that touch your account's data appear in your account's history. Support stops acting when the session's time limit ends.

12.3 Give consent for support to act

ADMINISTRATOR · WEB CONSOLE

1. When Zylergy support asks to act on your behalf, read what they want to change and why.
2. Give your consent in the product, or give the support ticket reference.
3. After the session, review the changes in your account's history.

RESULT

Support can make the agreed changes for a limited time. The session ends automatically, and each change is recorded with your consent.

A

APPENDIX A

Roles reference

Zylergy Solar sets access per user. Each user holds one or more of four roles: **Admin**, **Back office**, **Field tech** and **Customer**. Table A-1 lists what each role does. Homeowners hold **Customer** in the homeowner portal and are outside your company.

Inviting users and assigning their roles are **Admin** tasks (“Invite a user” on page 9). A person who holds more than one role can do the work of each. In a small company, for example, one person often holds **Back office** and **Admin**.

Table A-1 What each role does

ROLE	JOB TITLES	WORKS IN	WHAT THEY DO
Admin	Administrator	Web console	Invites users and assigns their roles. Grants and revokes access grants. Onboards sites, requests homeowner authorization and revokes it when needed. Confirms equipment inferred from telemetry. Uploads and digitizes manuals and sets their sharing. Overrides maintenance intervals. Maintains the pricebook, labor rates, tax and plan catalog. Works with Zylergy’s engineers on integrations. Reviews audit records and exports service and compliance records. Gives consent for Zylergy support to act in the account.
Back office	Sales, service coordinator, dispatcher	Web console	Works the **Overview** and the alert queue. Contacts homeowners. Generates and edits repair packages and sends quotes. Schedules visits, assigns technicians and routes work orders to subcontractors. Uses route and capacity optimization. Confirms equipment inferred from telemetry. Generates and sends invoices and offers and renews service plans. Exports payment status and bills of materials, and orders parts from a connected distributor. Uses portfolio analytics and recurring-revenue reporting.

Field tech	Technician, or subcontractor with access grants	Zylergy Solar app	Carries out guided repairs and maintenance and captures proof of fix on the equipment their access grants cover. Passes the verification gate. Opens the manuals of that equipment. Technicians add equipment from a nameplate or by manual entry and register QR tags. A subcontractor works on the equipment of the jobs routed to them.
Customer (the homeowner)	Homeowner	Homeowner portal	Sees their own system and its alerts. Signs quotes. Shares the site with an installer. Revokes the authorization for their own site.

Technicians and subcontractors are also limited by their access grants (“Access grants” on page 11).

B

APPENDIX B

Settings reference

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- Company settings 49

B.1 Personal settings in the app

Each technician or subcontractor sets these on their own device, under **Menu**, then their account.

Table B-1 Personal settings in the app

SETTING	WHAT IT DOES
Glove	Makes controls larger and easier to hit with gloves on.
Text LG	Uses a larger text size.
Contrast	Increases contrast for glare and low light.
Dark, **Daylight**, **Baseline**, **Auto**	Color schemes. **Auto** follows the ambient light.
Read QR / barcode first	Looks for a QR tag or barcode before reading nameplate text.
Notifications	Push notifications when something needs you, a daily digest, and quiet hours.
Units and formats	Units, date format and time zone in the app.
Offline & pack	Puts assigned jobs and their manual pages on the device.

B.2 Personal settings in the web console

Each person sets these for themselves in the web console.

Table B-2 Personal settings in the web console

SETTING	WHAT IT DOES
Appearance	The color scheme of the web console.
Density	Comfortable or compact tables and queues.
Landing page	The page the console opens on after sign-in.
Email and digests	Email when something needs you, and a daily summary.
Language and formats	Language, units, date format and time zone.

B.3 Company settings

Only an administrator changes these, in the web console.

Table B-3 Company settings: account, people and sites

SETTING	WHAT IT CONTROLS	SEE
Company details	Name, address, contacts, time zone, units, branding of quotes and invoices.	“Company details” on page 5
Users and roles	Who can sign in, and with which roles.	“Invite a user” on page 9
Access grants	Which equipment each technician and subcontractor can work on, per asset, group or contract.	“Access grants” on page 11
Groups of equipment	The groups used in access grants.	“Access grants” on page 11
Sites and authorization	Connected sites and their homeowner authorizations.	Chapter 4
Inverter vendor connections	The vendor systems your sites are read from.	“Inverter vendors and their monitoring systems” on page 19
Detection thresholds	Calibrated and documented by Zylergy. Changed on request.	“The fault library” on page 21

Maintenance intervals	Overrides of the intervals from manufacturer's documentation.	"Override an interval" on page 23
Warranty dates	The warranty dates that raise **Contract** alerts.	"Warranty and contract dates" on page 24
Manuals and sharing	Uploaded manuals and the authorization policy of each.	"Manuals" on page 26

Table B-4 Company settings: prices, integrations and policies

SETTING	WHAT IT CONTROLS	SEE
Pricebook	Prices of parts and tasks.	"The pricebook" on page 29
Labor rates	Rates for labor lines.	"Labor rates" on page 30
Tax	The tax on quotes and invoices.	"Tax" on page 30
Plan catalog	Service-plan tiers, coverage and prices.	"The plan catalog" on page 31
Integrations	BuildOps and other field-service platforms, price sync, distributors, electronic signature.	Chapter 8
Billing contact	Who receives Zylergy's invoices.	Chapter 11
Support access consent	Consent for Zylergy support to act in your account.	"Give consent for support to act" on page 45

Glossary

access grant

Permission for a technician or subcontractor to work on equipment, given per asset, per group of equipment or per service contract. People see exactly the equipment they are granted.

action plan

The repair steps in a repair package, each referring to a page in the equipment manual.

administrator

The person who manages users, sign-in, settings, integrations and support access, and reviews documents uploaded to the company's library. The matching role is **Admin**. In a small company the shop owner may also be the administrator.

alert

A job opportunity that Zylergy Solar raises for a site: a failure or imminent failure detected from telemetry, a device that has stopped reporting, a maintenance interval, a warranty date or a contract renewal. Alerts appear in the alert queue.

alert queue

The list of alerts in the Zylergy Solar web console, on the **Alerts** tab, where the office works through sellable jobs.

append-only

A record that can be added to but never edited or deleted. A correction is written as a new entry linked to the original.

asset record

The registry entry for one piece of equipment: make, model, serial number, location, who owns it, specifications and history. In Zylergy Facilities the asset brain is built on the asset record.

back office

The people who work in the web console: planning, dispatch, quotes, customers, supervision and reports. The matching role is **Back office**. In Zylergy Field this is the shop owner and any office staff. In Zylergy Facilities it is facility managers, dispatchers and compliance staff. In Zylergy Solar it is sales and service coordination.

bill of materials

The list of parts and quantities a repair needs. In Zylergy Solar it is part of the repair package.

Company Brain

Your organization's governed knowledge in Zylergy: the manuals, records, notes and photos the product draws on, with access set by your administrator. Each product presents it where you work: the document library in Zylergy Field, the asset brain in Zylergy Facilities, and the manuals and history on the asset record in Zylergy Solar.

credential vault

Encrypted storage for passwords and access tokens that connect Zylergy to other systems. Stored secrets are never shown to users.

data-use authorization

Your organization's permission for the outcomes of its work to improve the product for other customers, with auditable lineage.

dispatcher

The person who schedules and routes work.

guided repair

The step-by-step repair a technician follows on the Zylergy Solar app, with the manual page for each step one tap away.

homeowner portal

The page where the homeowner sees the health of their solar system, any alert and what happens next, and can share the system with their installer.

installer

The solar installation or service company that uses Zylergy Solar.

labor rate

The hourly rate used to price labor lines on a quote.

learning loop

The use of verified outcomes to refine procedures, task packages, intervals and the asset knowledge.

Level

The alert queue column that shows an alert's severity or type: **Critical**, **Warning** or **Contract**.

manufacturer's documentation

Installation, operation, service and parts documents published by the equipment manufacturer.

nameplate

The plate or label on equipment that carries its make, model, serial number and ratings.

offline

Working without a network connection. Work you record offline is saved on the device and synchronized when the connection returns.

preventive maintenance (PM)

Scheduled maintenance carried out at set intervals to keep equipment in service, such as a quarterly PM.

pricebook

Your company's prices for parts and tasks, used to price repair packages.

proof of fix

The photo and checklist a technician captures at the end of a Zylergy Solar repair.

QR tag

A label with a QR code bound to one asset record. Scanning it opens that asset.

quality score

The automatic score given to a completed job from its proof and how it was carried out, recorded with the job.

quote

The priced offer for a repair, with parts and labor, that the customer approves before work or parts are ordered.

remaining useful life

An estimate, derived from operating data and failure history, of how long a component can keep operating before it is expected to fail.

repair package

What Zylergy Solar builds from an alert: an action plan with manual page references, a bill of materials, labor and an editable quote.

role

What a user can do in Zylergy: **Admin**, **Back office**, **Field tech** or **Customer**, given per user by the administrator. A user can hold more than one role.

sales

The back-office staff in Zylergy Solar who work the telemetry and alert queue, call homeowners, quote and sell repairs and plans, and plan the jobs.

service contract

The agreement that results when a homeowner takes a service plan, with its tier and renewal date.

service coordinator

The back-office person who schedules visits, routes work orders and issues invoices. In small companies, sales does this work.

service log

The append-only history of a unit or site: repairs, diagnoses, maintenance visits, orders and returns, in one timeline.

service plan

A maintenance agreement your company offers its customers, built from tiers and add-ons in the web console and presented the same way by every technician.

site

A location that groups assets: a building or campus in Zylergy Facilities, a homeowner's property in Zylergy Solar.

site authorization

A homeowner's permission for Zylergy Solar to read telemetry from their inverter vendor account for one site. It can be revoked, and every authorization is recorded.

Site ID

The identifier of a homeowner's site in Zylergy Solar.

Status (alert)

Where an alert's job stands: **Open**, **Quoted** (the homeowner signed the quote), **Scheduled** or **Completed**.

subcontractor

An outside technician or company given access to exactly the asset a job is routed to.

sync

The transfer of changes between your device and Zylergy when a connection is available.

technician

A person who works at the equipment with the app. The matching role is **Field tech**.

telemetry

Operating data that inverters and batteries report through their manufacturer's system, such as output, diagnostics and connectivity.

verification gate

The check that keeps a job from being completed until its proof has been captured.

visit

One scheduled trip by a technician to a site.

web console

The browser-based part of a Zylergy product, used by the back office instead of the app.

work order

An assignment of work on an asset or site to a technician or contractor.

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