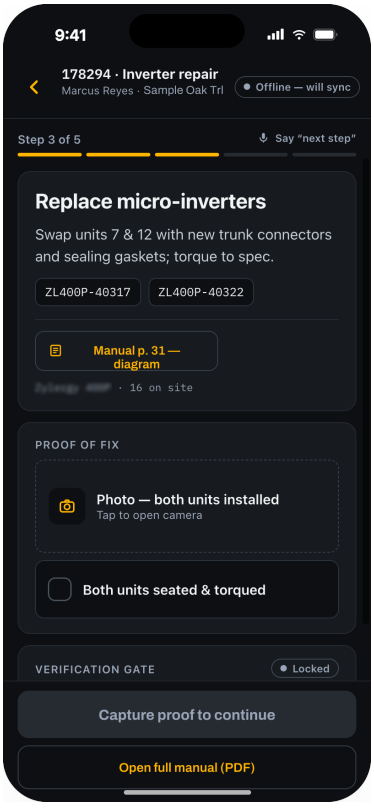
ZYLERGY

OPERATOR GUIDE

Zylergy Solar

Operator Guide

For sales, service coordinators, technicians and subcontractors using Zylergy Solar



SAMPLE DATA.

ZYLERGY

Zylergy, Inc.
Lewes, Delaware zylergy.com

ZY-SOL-OPG-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 people who do the daily work of a solar installation or service company in Zylergy Solar. Sales staff and service coordinators or dispatchers work in the web console. Technicians and subcontractors use the app on iPad or iPhone. The guide follows a job from the alert to the invoice. It also covers adding equipment, maintenance and contract work, stock and parts, and the homeowner portal, and it describes each screen. It assumes that you know how to sell and service solar equipment. If you are new to Zylergy Solar, start with the *Zylergy Solar Quick Start Guide*. Administrators set up the account as described in the *Zylergy Solar Admin Guide*.

How this guide is organized

- Chapter 1, “Safety information,” gives the safety messages for work at a site.
- Chapter 2, “Getting to know Zylergy Solar,” describes the web console, the app on iPad and iPhone and the homeowner portal, and how sign-in, notifications, settings and offline work behave.
- Chapter 3, “Telemetry and the alert queue,” covers the Overview, the alert queue, alert details and how alerts are detected.
- Chapters 4 to 7 follow a job through quoting, planning, the guided repair on site and closing the job.
- Chapter 8, “Adding equipment,” covers nameplate capture, manual entry, QR tags and equipment found from telemetry.
- Chapter 9, “Maintenance and contract jobs,” Chapter 10, “Stock and parts,” and Chapter 11, “The homeowner portal,” cover the rest of the daily work.
- Chapter 12, “Screen reference,” describes each screen.
- Chapter 13, “Troubleshooting,” lists symptoms, causes and what to do.
- The Glossary and the Index follow Chapter 13.

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 (this guide)	ZY-SOL-OPG-01	Everyday work in the app and the web console, and a reference for every screen
Zylergy Solar Admin 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-OPG-01`), the revision (A) and the page number.

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1

CHAPTER 1

Safety information

IN THIS CHAPTER

- General safety messages 1
- Manufacturer cautions in repair steps 2
- Content in the app and in this guide 3

Read this chapter before you use Zylergy Solar at a site. The safety messages in this chapter apply to all the work in this guide. A message that applies to one step appears in the procedure, just before that step.

> NOTE
>
> Zylergy Solar presents information from the equipment manufacturer's documentation and from your organization's records. It does not replace the manufacturer's instructions, applicable codes and regulations, your employer's safety procedures, or your training. Where they differ from what you see in the app, follow the manufacturer's instructions and your employer's procedures, and report the difference to your office.

1.1 General safety messages

⚠ WARNING

Hazardous voltage. Contact with energized parts can cause death or serious injury. Before you open any panel or service equipment, disconnect all power, including remote disconnects, follow your employer's lockout/tagout procedure, and verify with a meter that no voltage is present.

⚠ WARNING

Electric shock and arc flash. Photovoltaic modules produce voltage whenever they are exposed to light, and DC conductors can remain energized after the AC disconnect is opened. Contact with energized conductors or an arc fault can cause death or serious injury. Only qualified persons may service the array, inverters or connectors. Follow the manufacturer's shutdown procedure, use the personal protective equipment your employer requires, and verify that conductors are de-energized before you touch them.

⚠ WARNING

Stored energy. Battery systems store energy even when the system is switched off and can deliver dangerous current. Short circuits, damage or improper handling can cause fire, burns, electric shock or death. Only qualified persons may service battery systems. Follow the manufacturer's isolation procedure before you work on a battery or its connections.

⚠ WARNING

Fall hazard. Work on roofs and at height can result in death or serious injury from a fall. Use the fall protection your employer requires. Do not use the app while climbing or moving near a roof edge; stop, secure your position, then use the device.

⚠ CAUTION

Distraction near moving or energized equipment. Looking at a screen near rotating, energized or hot equipment can cause injury. Read the step, put the device in a secure place, then do the work.

⚠ CAUTION

Wrong equipment. Working on equipment other than the one shown in the app can cause injury or damage. Before you start, check that the make, model and serial number on the screen match the nameplate.

1.2 Manufacturer cautions in repair steps

Each step of an action plan refers to a page in the manufacturer's manual for the equipment. The reference appears with the step in the web console and in the guided repair on site. Open that page and read its cautions before you do the step. If a step shows no caution, check the manufacturer's documentation anyway. A caution can apply even when the app does not show one.

When you edit an action plan in the web console, keep the manual page reference on each step. The technician needs it to open the page on site. If you add a step that has no manual page, tell the technician where its instructions come from.

1.3 Content in the app and in this guide

Zylergy Solar builds alerts, repair steps and parts lists from telemetry and from the manuals in your organization’s records. They do not tell you that equipment is safe to touch. Equipment can report normally while a conductor is still energized. Treat every conductor as energized until you have verified that it is not.

The text that homeowners see in Zylergy Solar describes how their system is performing. It does not assess electrical safety. If a homeowner reports damaged or unusual equipment, follow your company’s procedures.

> NOTE
> The procedure text in figures is sample content. Always use the current manufacturer’s documentation for the equipment you service.

2

CHAPTER 2

Getting to know Zylergy Solar

IN THIS CHAPTER

- Web console, app and homeowner portal 5
- A job from start to finish 6
- What you need 7
- The web console 8
- The app on iPad or iPhone 9
- Notifications 12
- Personal settings 13
- Working offline 13
- The homeowner portal 14

Zylergy Solar reads the telemetry from your customers' solar systems and finds repair and maintenance work in it. It packages each job so that you can quote it, helps you plan one visit, guides the technician on site and verifies the result.

2.1 Web console, app and homeowner portal

The *back office* works in the web console. Technicians use the app at the site. Homeowners see their own system in the homeowner portal.

Table 2-1 The parts of Zylergy Solar

PART	WHO USES IT	WHAT IT IS FOR
The web console	Sales, service coordinators or dispatchers, administrators	Telemetry and the alert queue, repair packages and quotes, scheduling and work orders, invoices and service plans, stock, administration.
The Zylergy Solar app on iPad or iPhone	Technicians and subcontractors	Guided repair and maintenance with the manual pages for each step, proof of fix and the verification gate, adding equipment.
The homeowner portal	Homeowners	The health of their system, any alert and what happens next, and sharing the system with an installer.

Technicians use the app on an iPad or an iPhone. It works the same way on both. The figures in this guide show the iPhone layout.

Table 2-2 People and roles in this guide

PERSON	ROLE	WHERE	WHAT THEY DO
Sales	**Back office**	Web console	Works the alert queue, calls homeowners, builds and sends quotes, offers service plans.
Service coordinator or *dispatcher*	**Back office**	Web console	Schedules visits, routes work orders to technicians or subcontractors, checks parts, issues invoices.
Technician	**Field tech**	App	Carries out guided repairs and maintenance, captures proof of fix, adds equipment.
Subcontractor	**Field tech**, with access grants	App	Carries out a job routed to them and sees only the equipment for that job.
Administrator	**Admin**	Web console	Manages users and their roles, access grants, site authorization and vendor connections, settings, integrations, security and support access. See the *Zylergy Solar Admin Guide* (ZY-SOL-ADG-01).

Homeowner	**Customer**	Homeowner portal	Sees their own system. Does not use the web console or the app.

Sales usually does most of the back-office work and, in a small company, the scheduling too. Larger companies add a service coordinator or dispatcher for scheduling. Where a procedure names the service coordinator, sales can do it. Administration is separate, technical work, but one person can hold both **Back office** and **Admin**.

Your administrator assigns your *roles*. Technicians and subcontractors also need *access grants* for the equipment they work on. The line under each procedure title names who does the task and where.

2.2 A job from start to finish

A job can start with a failure detected from telemetry, a maintenance interval, a warranty date or a homeowner who shares their system. From there it follows the path in Table 2-3. The table shows who does each part, where, and the alert's status afterward.

Table 2-3 The path of a job

STAGE	WHO	WHERE	STATUS AFTER-WARD	SEE
An alert is raised from telemetry, an interval, a date or a homeowner share	Zylergy Solar	Alert queue	**Open**	Chapter 3
Review the alert, the equipment and the history	Sales	Web console	**Open**	"Alert details" on page 19
Generate and edit the repair package	Sales	Web console	**Open**	Chapter 4
Call the home-owner and send the quote	Sales	Web console	**Open**	"Send the quote and get it signed" on page 29
The homeowner signs the quote	Homeowner	Link or PDF from Zylergy Solar	**Quoted**	"After the homeowner signs" on page 29

Book the visit, assign the technician, check the parts	Service co-ordinator or sales	Web console	**Scheduled**	Chapter 5
Carry out the guided repair and capture proof of fix	Technician or subcontractor	App	**Scheduled**	Chapter 6
Pass the verification gate	Technician or subcontractor	App	**Completed**	“Pass the verification gate” on page 39
Invoice the job and offer a service plan	Service co-ordinator or sales	Web console	**Completed**	Chapter 7

Each verified outcome goes into the site’s service log. Zylergy Solar also uses verified outcomes to improve future alerts, repair packages, intervals and stock recommendations.

2.3 What you need

Table 2-4 What you need to use Zylergy Solar

ITEM	DETAILS
An invitation from your company	Your administrator adds you to Zylergy Solar and sends a join link to your work email.
For the back office: a computer with a browser	Use a current version of Google Chrome, Microsoft Edge, Safari or Firefox. Your administrator gives you the web console address.
For technicians and subcontractors: an iPad or iPhone with the Zylergy Solar app	The device needs iPadOS or iOS 26 or later. Download the app from the App Store and install it before you sign in for the first time.
A network connection	Needed to sign in and for all work in the web console. The guided repair also works offline (“Working offline” on page 13).
Camera access in the app	The app uses the camera to read nameplates, scan QR tags and take proof-of-fix photos.

2.4 The web console

The back office works in the web console. Each page has the header shown in Figure 2-1.



Figure 2-1 The web console header with its tabs and the search field. Sample data.

Table 2-5 The web console header

ITEM	WHAT IT OPENS
Overview	Summary figures, the sites that need attention, fleet health, maintenance that is due, and recent activity (“The Overview” on page 15).
Alerts	The alert queue and the details of the selected alert (“The alert queue” on page 17).
Quotes	Your quotes.
Work Orders	Work orders created from signed quotes.
Customers	Your homeowners.
Sites	Your sites and their equipment.
Search	Finds sites, serial numbers and customers. The field shows **Search sites, serials, customers…** until you type.

The active tab is underlined. Pages you open from an alert, such as the repair package, show a path at the top, for example **Alerts** / Site ID / **Repair package**. Click **Alerts** in the path to go back to the queue.

Sign in to the web console

SALES, SERVICE COORDINATOR, ADMINISTRATOR · WEB CONSOLE · NEEDS A SIGNAL

BEFORE YOU BEGIN

- Your administrator has invited you.

1. In a supported browser, go to the web console address your administrator gave you.
2. Enter your work email address.
3. Click **Continue**.
4. If your company uses single sign-on, sign in on your company’s sign-in page.
5. If the console asks for a 6-digit code, enter the code from your text message, email or authenticator app.

6 If you belong to more than one organization, choose the one you want to work in.
7 If you chose an organization, click **Continue**.

RESULT

The web console opens. It remembers the organization you chose in this browser.

If you leave the console idle, it signs you out. When you sign in again, you return to the page you were on.

2.5 The app on iPad or iPhone

The Zylergy Solar app uses a dark field mode, with high contrast and large controls for work with gloves and in bright sun.

Sign in to the app

The sign-in screen asks only for your work email (Figure 2-2).

TECHNICIAN, SUBCONTRACTOR · IPAD OR IPHONE · NEEDS A SIGNAL

BEFORE YOU BEGIN

- The Zylergy Solar app is installed on your device.
- Your company has invited you, and you know the work email address the invitation was sent to.
- Your device has a network connection.

1. Open the Zylergy Solar app.
2. In **Work email**, enter your work email address.
3. Tap **Continue**.
4. If your company uses single sign-on, sign in on your company's sign-in page when it opens.
5. If the app asks for a 6-digit code, enter the code from your text message, email or authenticator app.
6. When the app offers Face ID for next time, choose whether to use it.

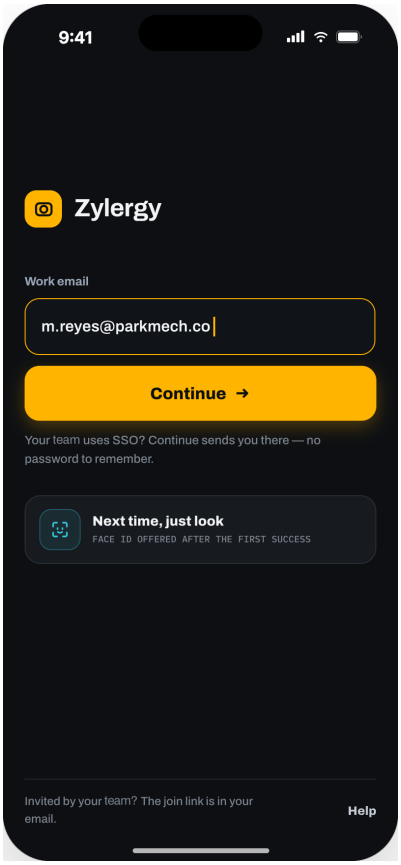


Figure 2-2 The sign-in screen. Sample data.

RESULT

You are signed in. The first time, the app then asks for camera access ("First run and permissions" on page 11).

After the first sign-in, the app opens without asking again. If you have to sign in and your device has no signal, the app says that sign-in needs a signal. Work already on the device then opens read-only until you sign in. If the app does not recognize your address, check it. If the address is correct, ask your administrator to invite you.

First run and permissions

The first time you open the app, it asks for camera access (Figure 2-3). The camera reads nameplates, scans QR tags and takes proof-of-fix photos. The app asks for notification access later, when it first needs it.

TECHNICIAN, SUBCONTRACTOR · IPAD OR IPHONE

1. Tap **Enable the camera**.
2. When iPadOS or iOS asks for permission, allow camera access.

RESULT

The **Home** screen opens.

If you tap **Not now — I'll type it in**, you type equipment details instead, and the app shows where to turn the camera on. You need the camera for proof-of-fix photos, so allow camera access in the Settings app on your device before your first job.

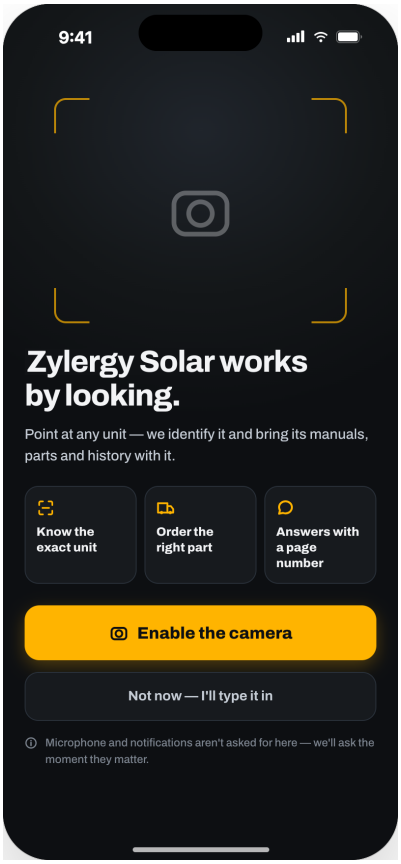


Figure 2-3 The first-run screen asks for camera access. Sample data.

Find your way around the app

The bar at the bottom of the app has four tabs (Table 2-6).

Table 2-6 The main parts of the app

PART	WHAT IT IS FOR
Home	The visits assigned to you, work you paused, and what changed since you last looked. Tap a visit to open its job.
Scan	Opens the camera to scan a QR tag or read a nameplate (Chapter 8).
Your jobs	The work orders routed to you.
Menu	Notifications, search, your account and settings, **Offline & pack**, and **Help**.

The guided repair opens when you start a job (Chapter 6). The **Add equipment** screen opens when you read a nameplate (“Capture a nameplate” on page 45).

Search

Search finds sites, equipment by serial number, and jobs. In the web console, use the search field in the header. In the app, open search from **Home** or **Menu**. When the app is offline, search covers what is stored on the device.

2.6 Notifications

Zylergy Solar sorts notifications into two groups:

- **Needs you.** Something you must act on, such as a job assigned to you. These stay until you act on them. The badge on the app counts only these.
- **FYI.** Updates, such as a quote that a homeowner signed. You can swipe them away.

You choose quiet hours and a daily digest in your settings (“Personal settings” on page 13).

2.7 Personal settings

Your device settings are in **Menu**, under your account. They affect only you. Your administrator manages your roles, your access and your company's settings in the web console.

Table 2-7 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, for example dark in an equipment room and daylight in bright sun on a roof. Tap a scheme to keep it.
Read QR / barcode first	Looks for a QR tag or barcode before reading the nameplate text.
Notifications	Push notifications when something needs you, an optional daily digest, and quiet hours.
Units and formats	Units, date format and time zone used in the app.
Sign out	Signs you out of the app on this device.

In the web console, you also set your own color scheme, table density, landing page and email notifications. For the full list, see the appendix "Settings reference" in the *Zylergy Solar Admin Guide* (ZY-SOL-ADG-01).

2.8 Working offline

Rooftops and equipment rooms often have poor coverage, so the app keeps your assigned jobs on the device and saves your work there. It synchronizes when the connection returns. While the app is offline, it shows **Offline — will sync** at the top of the screen.

Table 2-8 Offline behavior in the app

WORKS OFFLINE	NEEDS A SIGNAL
The steps of your assigned jobs that are stored on the device	Signing in
The manual pages those steps refer to, and the full manuals for jobs you packed	Everything in the web console
Capturing proof of fix: photos and checklist items	New alerts and current telemetry

Confirming a repair whose verification gate needs only photo and checklist proof	The telemetry check of the verification gate, where the job has one
Reading a nameplate and creating an asset record (the record and its QR tag sync when you are back in coverage)	Search beyond what is stored on the device

Pack for offline work

Packing downloads your assigned jobs and the manual pages their steps refer to onto the device. Pack before you leave.

TECHNICIAN, SUBCONTRACTOR · IPAD OR IPHONE · WI-FI

1. Tap **Menu**.
2. Tap **Offline & pack**.
3. Check that today's jobs are listed and turned on.
4. Tap **Pack now**.

RESULT

Each job shows that it is ready for offline use, and **Home** shows the time of the pack.

Pack again if your visits change during the day.

How offline work is synchronized

Proof-of-fix photos, checklist items, a confirmed repair and new asset records that you record offline are saved on the device first. When the connection returns, the app sends them to Zylergy Solar. Until then, the web console shows the job as it was at the last sync.

> NOTE
> Work saved only on the device has not yet reached Zylergy Solar. Before you sign out, reset the device or remove the app, check that the app is online and no longer shows **Offline — will sync**.

2.9 The homeowner portal

Homeowners see their own system in the homeowner portal. The portal shows the system's health, any alert and what happens next. The homeowner can also share the system with an installer. Your company does not work in the portal. For what the homeowner sees, see Chapter 11.

3

CHAPTER 3

Telemetry and the alert queue

IN THIS CHAPTER

- The Overview 15
- The alert queue 17
- Alert details 19
- How alerts are detected 22

Zylergy Solar reads the telemetry of each connected site, detects problems and raises *alerts*. Each alert is a job you can quote.

3.1 The Overview

The **Overview** tab shows the health of your fleet and which sites need attention first (Figure 3-1). Start your day here.

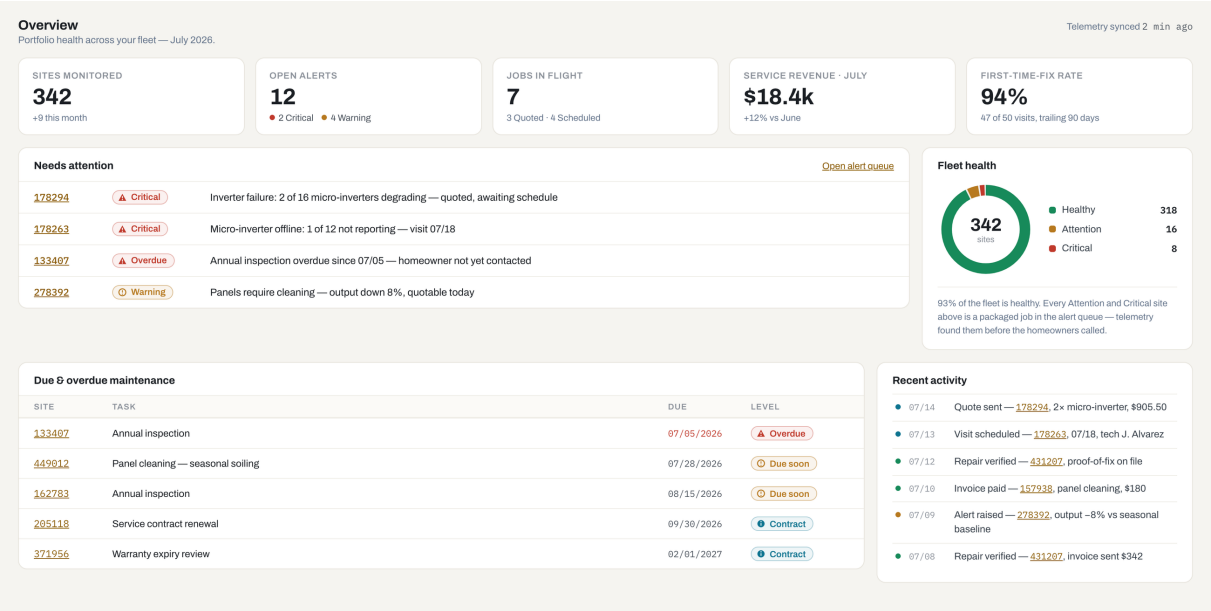


Figure 3-1 The Overview tab: summary figures, the sites that need attention, fleet health, maintenance that is due and recent activity. Sample data.

Table 3-1 What is on the Overview

AREA	WHAT IT SHOWS
Header	**Overview**, the month the figures cover, and when telemetry was last synchronized.
Sites monitored	The number of connected sites, and the change this month.
Open alerts	The number of open alerts, split by level.
Jobs in flight	Jobs that are quoted or scheduled.
Service revenue	Service revenue for the month, compared with the month before.
First-time-fix rate	The share of visits that fixed the problem on the first visit, over a trailing period.
Needs attention	The sites to deal with first, each with its level or **Overdue**, and the link **Open alert queue**.
Fleet health	All your sites by health: **Healthy**, **Attention** and **Critical**.
Due & overdue maintenance	Maintenance tasks with their **Site**, **Task**, **Due** date and **Level**, marked **Overdue**, **Due soon** or **Contract**.

Recent activity	Quotes sent, visits scheduled, repairs verified, invoices sent and paid, and new alerts, with dates.

Site IDs on the **Overview** are links.

Portfolio analytics

Zylergy Solar also reports on your fleet and your service business over time. The portfolio analytics cover detection, how many alerts become sold jobs, first-time fix and fleet health. Recurring-revenue reporting covers your service contracts and maintenance (“Recurring-revenue reporting” on page 43).

3.2 The alert queue

The *alert queue* on the **Alerts** tab lists the alerts for your sites (Figure 3-2). It includes problems detected from telemetry, maintenance intervals, warranty and contract dates, and sites that homeowners share with you.

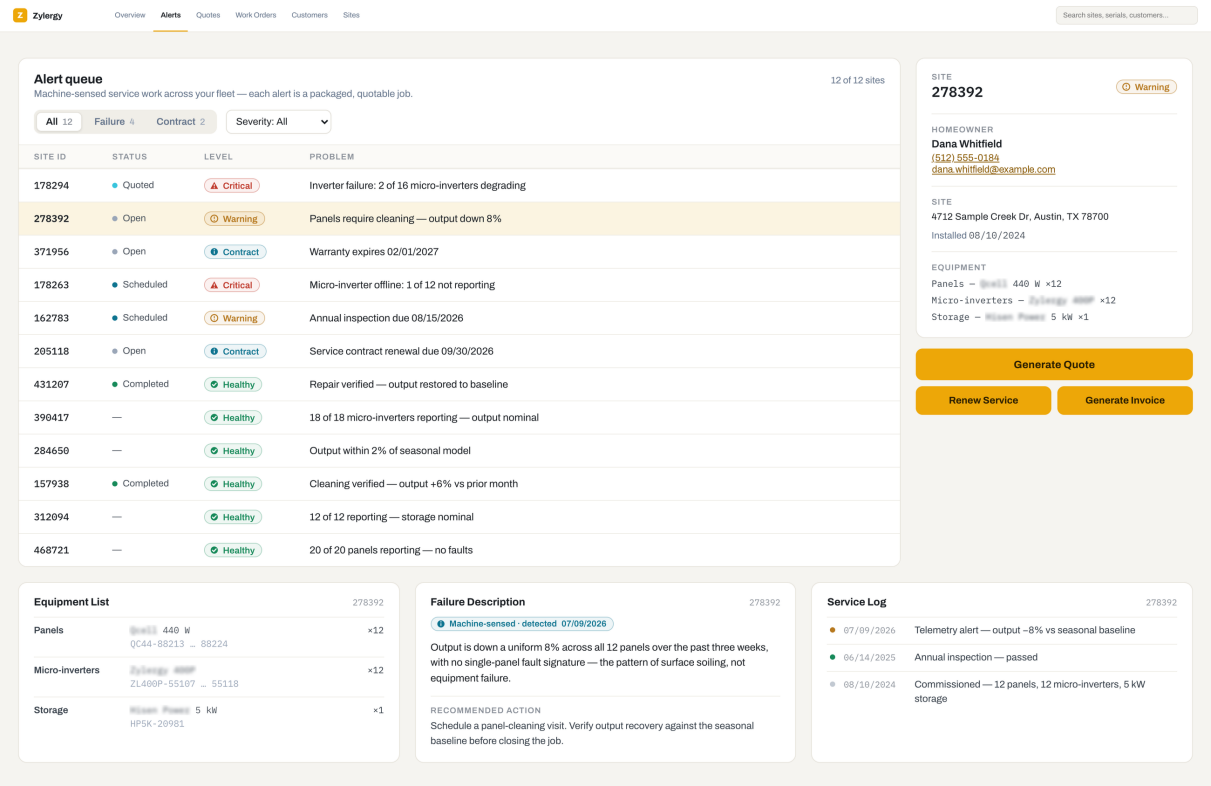


Figure 3-2 The alert queue with one alert selected and its details on the right and below. Sample data.

Table 3-2 Columns of the alert queue

COLUMN	WHAT IT SHOWS
Site ID	The identifier of the homeowner's site.
Status	Where the job stands (Table 3-3).
Level	How severe or what kind of alert it is (Table 3-4).
Problem	The problem in plain words, such as a number of micro-inverters degrading or a warranty end date.

Above the queue, the title shows how many sites the queue covers, for example **12 of 12 sites**. The queue updates as alerts arrive and as you act on them.

Table 3-3 Status values

STATUS	MEANING
Open	The alert has no signed quote yet. You may have built or sent a quote.
Quoted	The homeowner has signed the quote. The job can be scheduled. A quote that you have sent but the homeowner has not signed stays **Open**.
Scheduled	A visit is booked and a technician or subcontractor is assigned.
Completed	The repair passed the verification gate, and its outcome is on the service log.

Table 3-4 Level values

LEVEL	MEANING
Critical	A failure or an imminent failure. The alert gives a recommended action and the time window for it.
Warning	A fault or a loss of output that needs attention but is less urgent, such as soiling or shading.
Contract	A date-based alert, such as a warranty that expires or a service contract renewal that is due. Maintenance interval alerts carry the level that fits them.

The queue also lists sites that have no open alert. These rows show the health label **Healthy**. A dash in **Status** means that no job is in progress at the site. Each status and level has a colored dot or chip, an icon and a label.

Filter and search the queue

SALES, SERVICE COORDINATOR · WEB CONSOLE

1. In the header, click **Alerts**.
2. Above the queue, click **All**, **Failure** or **Contract**. Each filter shows the number of alerts it contains.
3. To show only some levels, choose them in the **Severity: All** list.
4. To find a site, enter a Site ID, a serial number or a customer name in the search field in the header.

RESULT

The queue shows only the alerts that match. Click **All** and choose all levels to see the whole queue again.

Work the queue each day

Work the queue in this order each day:

1. On the **Overview**, check the telemetry sync time and read **Needs attention**.
2. On the **Alerts** tab, work the **Critical** alerts first, then **Warning**, then **Contract**.
3. For each alert you can sell, generate the repair package, call the homeowner and send the quote the same day.
4. Check alerts that are still **Open** after a quote was sent, and follow up with the homeowner.
5. Check that every **Quoted** alert has a visit booked.
6. At the end of the day, invoice the jobs that reached **Completed**.

3.3 Alert details

When you select a row, the alert's details open in the site panel on the right and in three panels below the queue (Figure 3-3). Each panel shows the Site ID at the top right.

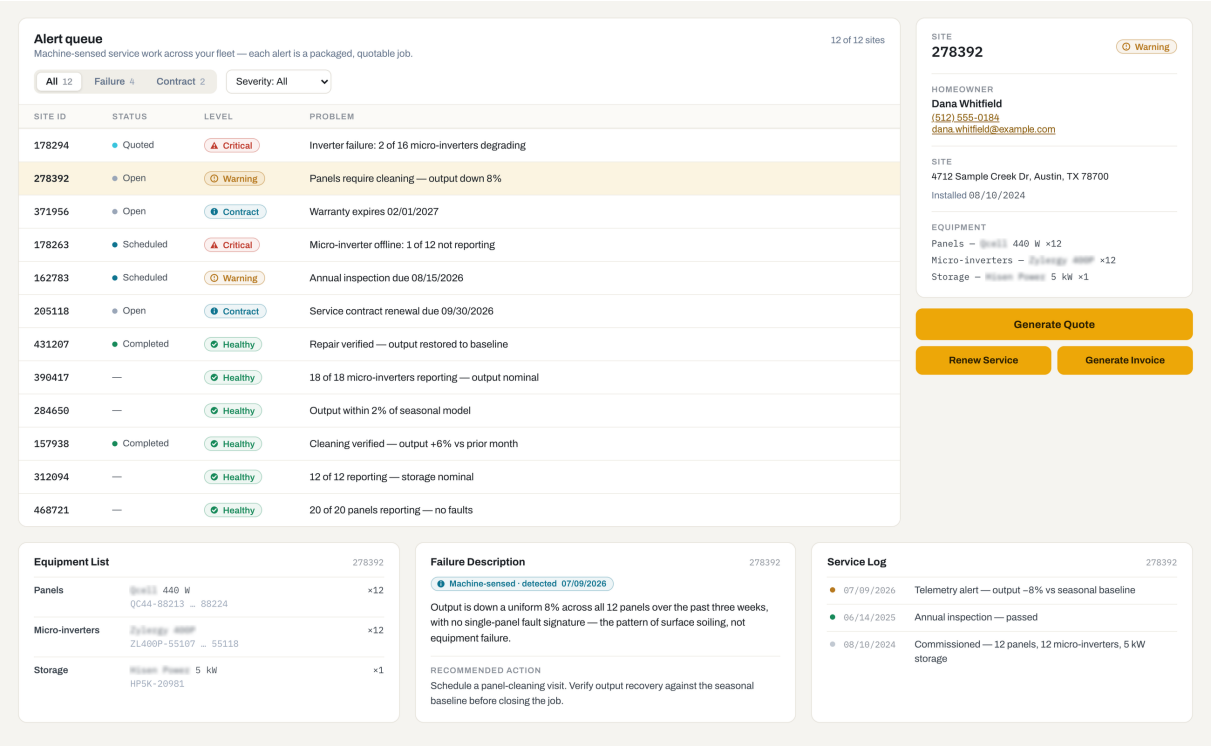


Figure 3-3 The details of a selected alert, with the site, homeowner and equipment on the right and the equipment list, failure description and service log below. Sample data.

Table 3-5 The details of an alert

AREA	WHAT IT SHOWS
Site	The Site ID and the alert's level.
Homeowner	The homeowner's name, phone number and email address. The phone number and email address are links.
Site address	The street address and the date the system was installed.
Equipment	The panels, inverters and storage at the site, with model and quantity.
Generate Quote	Builds the repair package and quote for this alert (Chapter 4).
Renew Service	Offers or renews a service plan for the site (“Offer a service plan” on page 42).
Generate Invoice	Generates the invoice for a completed job (“Generate and send the invoice” on page 42).
Equipment List	Each type of equipment with its model, the range of serial numbers and the quantity.

Failure Description	What was detected and when, in plain language, marked **Machine-sensed** with the detection date, and the **Recommended action**.
Service Log	The site's history, newest first: alerts, inspections, repairs, cleaning and commissioning.

The *site* groups the equipment at one homeowner's property, with its location and install date. Each piece of equipment has an *asset record*. The record holds the make, model, serial number, location and history, including signed quotes and verified repairs. You also open the equipment's manuals from the asset record.

Machine-sensed means that Zylergy Solar detected the problem from telemetry.

Open an alert

SALES · WEB CONSOLE

1. In the header, click **Alerts**.
2. Click the row of the alert. The row is highlighted.
3. In the panel on the right, check the homeowner, the site and the equipment.
4. In **Failure Description**, read what was detected and the **Recommended action**.
5. In **Service Log**, check what was done at the site before.

RESULT

The alert is open, and you know the problem, the equipment at the site and its history.

Contact the homeowner

Call the homeowner once you have the fixed price from the repair package ("Generate and edit a repair package" on page 27, Chapter 4).

SALES · WEB CONSOLE

1. Open the alert.
2. Generate the repair package ("Generate and edit a repair package" on page 27).
3. Note the total.
4. In the **Homeowner** block, use the phone number to call the homeowner, or click the email address to write to them.
5. Explain what was detected, what the repair involves and the price.

RESULT

The homeowner knows the problem and the price and expects your quote.

3.4 How alerts are detected

Zylergy Solar reads telemetry from your inverter vendor's system for each site whose homeowner has authorized access. Detection runs on each kind of data the equipment reports. For each problem it produces one diagnosis with the fault type, the affected component, the level, the confidence of the detection, and the recommended action with its time window.

Table 3-6 What Zylergy Solar detects

KIND OF ALERT	HOW IT IS DETECTED
Component degradation, such as capacitor wear in micro-inverters	Trends in the equipment's own diagnostics show the component wearing out. The alert comes before the failure and gives the remaining useful life ("Remaining useful life" on page 23).
Imminent failure	A component's projected remaining useful life is running out. The alert arrives before the projected failure.
Underperformance	Output is lower than expected for the site and season. The pattern points to soiling, shading or a panel that has dropped out.
Water intrusion	The equipment's data shows a water-intrusion fault.
Equipment that has stopped reporting	Equipment that normally reports has gone silent.
Vendor failure notices	Your inverter vendor's system reports a failure. Zylergy Solar turns the notice into an alert.
Maintenance interval	A cleaning or inspection is due, from the intervals in the manufacturer's documentation (Chapter 9).
Warranty and contract	A warranty expires or a service contract renewal is due (Chapter 9).
Shared by a homeowner	A homeowner used **Share with my installer** in the homeowner portal ("Share with my installer" on page 55).

Problems detected from telemetry are raised as **Critical** or **Warning**. Warranty and contract dates are raised as **Contract**.

Zylergy calibrates the levels, the thresholds and the fault library on real data and documents them for your account. See the *Zylergy Solar Admin Guide* (ZY-SOL-ADG-01), chapter "Detection and maintenance."

Remaining useful life

For components that wear out, Zylergy Solar projects the *remaining useful life*. This is how long the component can keep operating before it is expected to fail. The projection comes from failure history across the installed base and improves as that history grows. When a component nears the end of its projected life, Zylergy Solar raises an alert. You can then offer the repair before the homeowner loses production.

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.

When telemetry is incomplete

Zylergy Solar checks the telemetry it receives and flags gaps, stale feeds and malformed records. When the feed for a whole site stops, the problem is the connection between Zylergy Solar and your inverter vendor's system. When a single device stops reporting, Zylergy Solar raises an alert.

If a homeowner revokes the authorization for a site, Zylergy Solar stops reading the site's telemetry. No new alerts are raised for the site.

4

CHAPTER 4

Building and sending a quote

IN THIS CHAPTER

- The repair package 24
- Generate and edit a repair package 27
- Send the quote and get it signed 29

A *repair package* turns an alert into a job you can sell and carry out. It holds an *action plan* whose steps refer to pages in the equipment manual, a *bill of materials*, the labor and a *quote*. You review and edit the package, call the homeowner with the price and send the quote for signature.

Jobs are sold at a fixed, upfront price, and the quote gives the homeowner that price before the visit. The exception is something unusual that the technician finds on site and that the telemetry could not show. In that case, the technician explains the finding to the homeowner, calls your salesperson and quotes the extra work on the spot. For example: “We found leakage in a panel that will likely fail. A swap is $950, and we can come back Friday.”

4.1 The repair package

Generate Quote on an alert opens the repair package (Figure 4-1). Zylergy Solar builds the package from the manuals and records for the site’s equipment. It prices the package from your company’s pricebook and labor rates. The path at the top of the page reads **Alerts** / Site ID / **Repair package**.

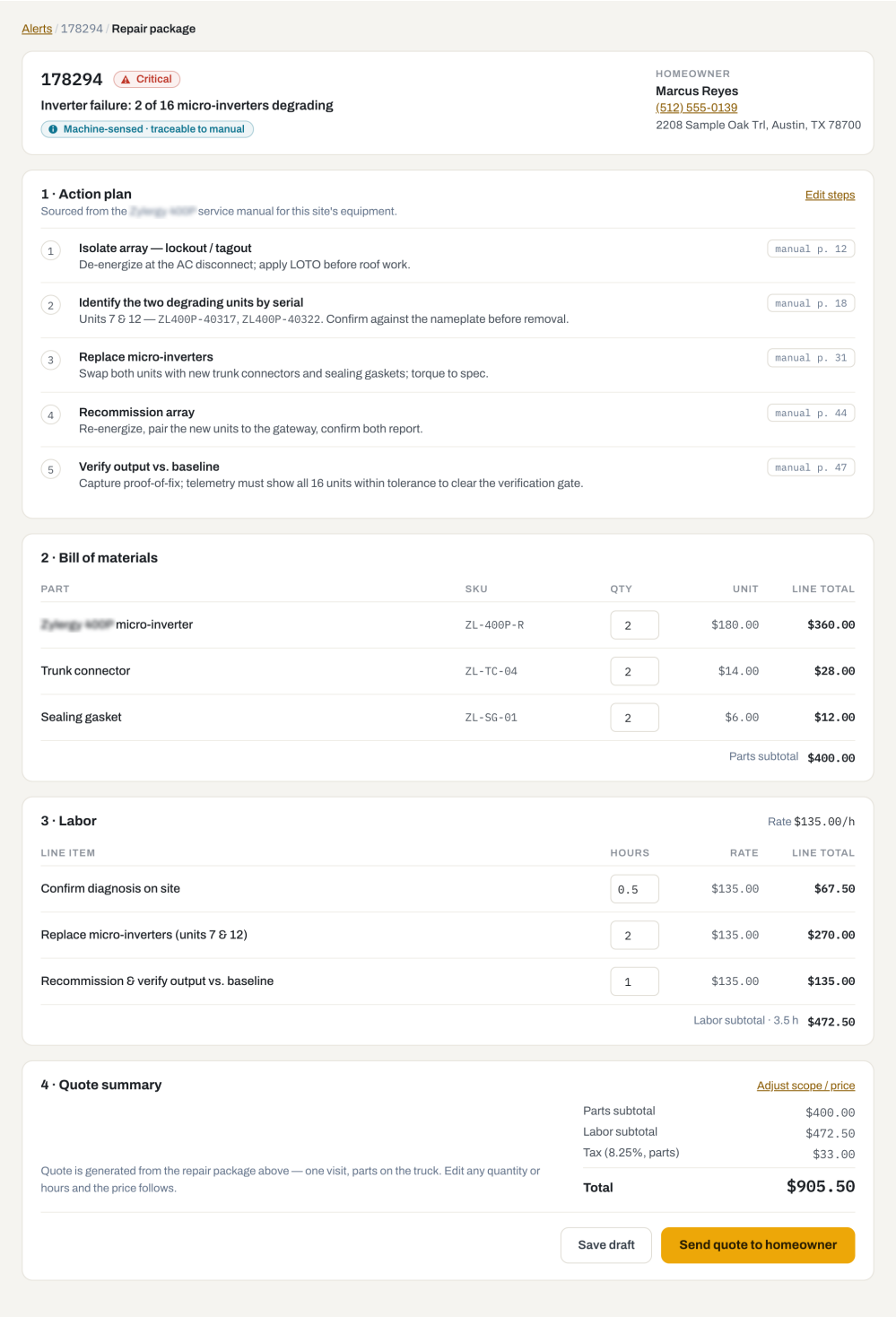


Figure 4-1 A repair package and quote. Each step of the action plan refers to a page in the equipment manual. Sample data.

Table 4-1 The parts of a repair package

PART	WHAT IT CONTAINS
Header	The Site ID, the alert's level and problem, the chip **Machine-sensed · traceable to manual**, and the **Homeowner** block with name, phone number and address.
1 · Action plan	The repair steps in order, each with a short instruction and a chip with the manual page it comes from. The line under the title names the source manual. **Edit steps** opens the plan for editing.
2 · Bill of materials	The parts for the job: **Part**, **SKU**, **Qty**, **Unit** price and **Line total**, with the **Parts subtotal**. You can change each quantity.
3 · Labor	The labor lines with **Hours**, **Rate** and **Line total**, the labor rate that applies, and the **Labor subtotal** with the total hours. You can change the hours on each line.
4 · Quote summary	**Parts subtotal**, **Labor subtotal**, tax and **Total**. **Adjust scope / price** lets you change the scope or the price.
Actions	**Save draft** and **Send quote to homeowner**.

The technician sees the steps of the action plan on site, one at a time, in the guided repair (Chapter 6). The quote covers one visit with the parts on the truck. The action plan normally includes confirming the diagnosis, the repair, and a check that the repair worked.

How verified outcomes improve repair packages

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 repair packages. For a fault with enough history, the action plan and the bill of materials reflect what fixed that fault before. A quote can also show price guidance from labor and parts outcomes across the installed base. The guidance is a suggestion, and you can change the price on the quote.

Photos and verified outcomes from the field are also used to fine-tune Zylergy's vision models. The setting **Help our vision models to become better at detecting parts** is on by default for your whole company. Only your administrator can change it. Your company's customer agreement sets the terms for how its data is used.

4.2 Generate and edit a repair package

SALES · WEB CONSOLE

BEFORE YOU BEGIN

- The alert is selected on the **Alerts** tab (“Open an alert” on page 21).

1. In the site panel on the right, click **Generate Quote**. The repair package opens.
2. Under **1 · Action plan**, read each step and the manual page it refers to.
3. Under **2 · Bill of materials**, check that the parts match the equipment at the site.
4. Under **3 · Labor**, check the hours for each line.
5. Under **4 · Quote summary**, check the total.
6. Click **Save draft**.

RESULT

The repair package and its quote are saved as a draft on the alert. The alert’s status is still **Open**.

Edit the action plan

SALES · WEB CONSOLE

1. In the repair package, under **1 · Action plan**, click **Edit steps**.
2. Change, add, remove or reorder the steps the job needs.
3. For each step you add, enter the manual page it comes from.
4. Save your changes.

RESULT

The action plan shows your steps. The technician sees these steps in the guided repair.

Change quantities and hours

SALES · WEB CONSOLE

1. Under **2 · Bill of materials**, click the quantity of a part.
2. Enter the new quantity. The line total and the **Parts subtotal** change.
3. Under **3 · Labor**, click the hours of a line.
4. Enter the new hours. The line total and the **Labor subtotal** change.
5. Under **4 · Quote summary**, check the new total.

RESULT

The quote shows your changes. They are kept when you save or send the quote.

Adjust the scope or the price

Use **Adjust scope / price** when the job is larger or smaller than the package, or when you and the homeowner agree on a different price.

SALES · WEB CONSOLE

1. Under **4 · Quote summary**, click **Adjust scope / price**.
2. Change the scope or the price.
3. Save your changes.
4. Check the **Total**.

RESULT

The quote shows the adjusted scope and price.

Your administrator sets up the pricebook, the labor rates and tax. See the *Zylergy Solar Admin Guide* (ZY-SOL-ADG-01), chapter “Pricebook, labor rates and plans.”

Check a quote before you send it

Table 4-2 Checks before you send a quote

CHECK	WHY
The equipment in the bill of materials matches the site’s **Equipment** and the alert	A part for the wrong model means a second visit.
Each step of the action plan has its manual page	The technician opens the page on site. Without it, the step has no instructions.
The labor includes confirming the diagnosis and checking the result	The visit must also cover the verification gate.
The quantities and hours fit this site	The package is built for the fault. This site may need more or less.
The total matches what you told the homeowner	The homeowner signs the quote you send.

4.3 Send the quote and get it signed

Call the homeowner before you send the quote (“Contact the homeowner” on page 21). When the homeowner agrees to the price, send the quote for signature.

SALES · WEB CONSOLE

BEFORE YOU BEGIN

- The repair package is complete and saved (“Generate and edit a repair package” on page 27).

1. Open the repair package for the alert.
2. Check the total under **4 · Quote summary**.
3. Click **Send quote to homeowner**. Zylergy Solar sends the quote to the homeowner as a link or a PDF.

RESULT

The homeowner receives the quote. When the homeowner signs it electronically, the alert’s status changes to **Quoted** and the job can be scheduled.

> NOTE
> **Quoted** means that the homeowner has signed. Until the signature arrives, the alert stays **Open**, even after you have sent the quote.

After the homeowner signs

When the homeowner signs:

- The alert’s status changes to **Quoted**.
- The signed quote is kept on the site’s asset record, where you and the technician can see it.
- A work order is created from the signed quote, ready to schedule and route (Chapter 5).

Templates and follow-up

You can base quotes on templates and track follow-up with homeowners who have not signed yet.

5

CHAPTER 5

Planning the job

IN THIS CHAPTER

- The Schedule & billing page 30
- Schedule the visit 32
- Work orders and routing 33
- Route and capacity optimization 34

Each job is planned as one visit. The office knows the diagnosis when it quotes, so the technician can arrive with the right parts and the guided steps. You book the visit, assign the work and send it to your technician, a subcontractor or your field-service system.

5.1 The Schedule & billing page

The **Schedule & billing** page has the visit at the top and the close-out below (Figure 5-1). The path at the top reads **Alerts** / Site ID / **Schedule & billing**.

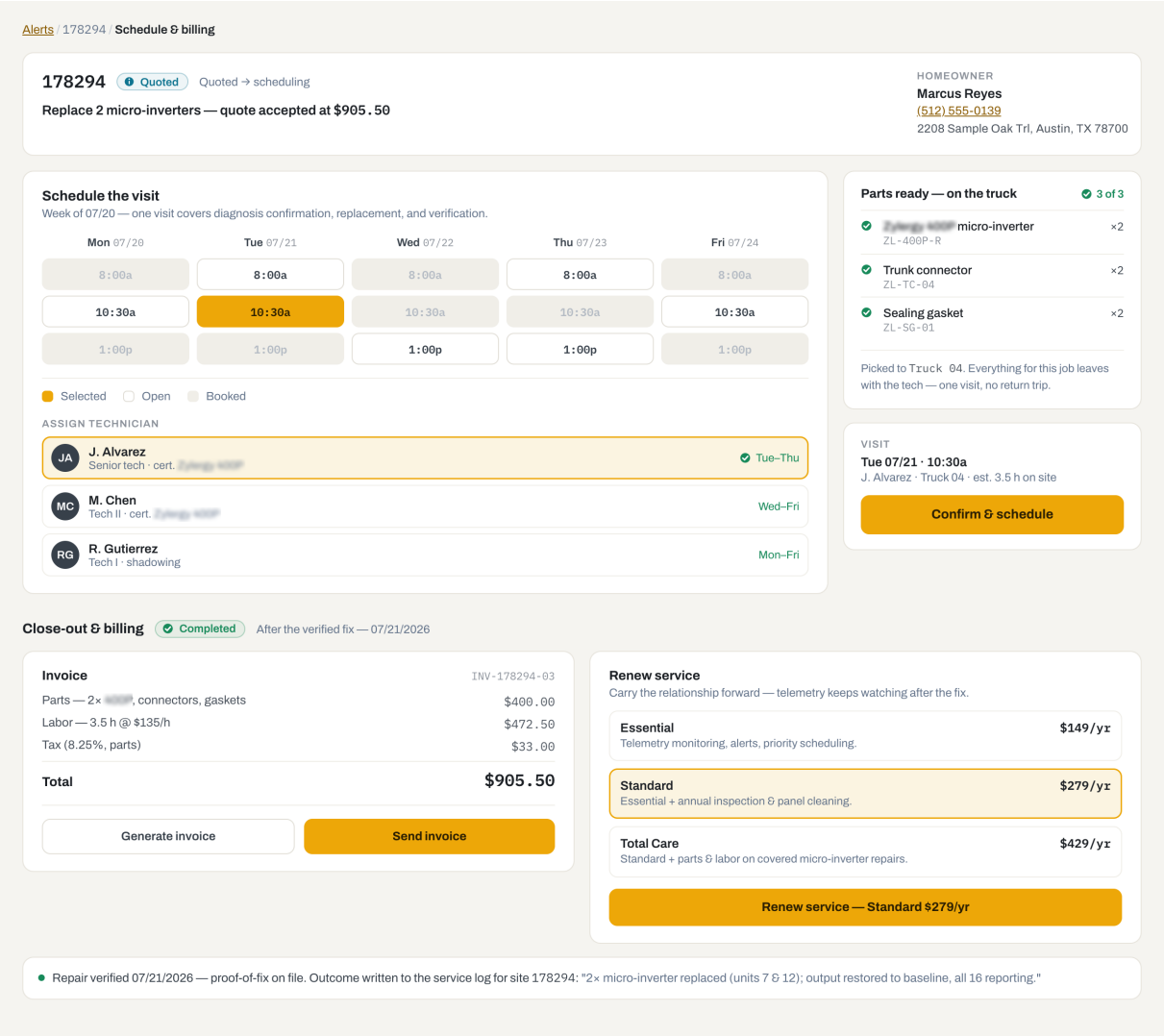


Figure 5-1 The Schedule & billing page: scheduling the visit, parts, the visit summary, and the close-out with the invoice and the service-plan offer. Sample data.

Table 5-1 The scheduling half of the page

AREA	WHAT IT SHOWS
Header	The Site ID, the status **Quoted**, the line **Quoted → scheduling**, what the job is and the signed amount, and the **Homeowner** block.
Schedule the visit	The week, with the slots for each day. A slot is **Selected**, **Open** or **Booked**. The line under the title says what the one visit covers.
Assign technician	Your technicians, each with the days they are available. The selected technician is highlighted.

Parts ready — on the truck	Each part from the bill of materials with its SKU and quantity, a check mark when it is ready, and a count such as **3 of 3**.
Visit	The date and time, the technician, the vehicle and the estimated time on site, and **Confirm & schedule**.

Assign technician shows who is available for the visit. Scheduling uses your technicians' actual availability and favors a single visit for the whole job.

5.2 Schedule the visit

SERVICE COORDINATOR OR SALES · WEB CONSOLE

BEFORE YOU BEGIN

- The alert's status is **Quoted**.

1. Open the **Schedule & billing** page for the alert.
2. Under **Schedule the visit**, click an open slot. The slot is marked **Selected**. Booked slots cannot be selected.
3. Under **Assign technician**, click the technician for the visit.
4. Under **Parts ready — on the truck**, check that every part is marked ready.
5. Under **Visit**, check the date, time, technician and time on site.
6. Click **Confirm & schedule**.

RESULT

The alert's status changes to **Scheduled**. The work order is assigned to the technician. The visit appears in the technician's app.

> TIP
> Assign a technician who has access to the site's equipment. A technician without access to the equipment cannot open the job. See the *Zylergy Solar Admin Guide* (ZY-SOL-ADG-01), chapter "Users, roles and access grants."

Parts for the visit

Parts ready — on the truck lists the parts from the job's bill of materials. Before you confirm the visit, check that each part is ready to leave with the technician. To see which parts to keep in stock, see Chapter 10.

Reschedule a visit

If your company manages schedules in BuildOps, reschedule the visit there (“Work orders in BuildOps” on page 34).

5.3 Work orders and routing

When the homeowner signs the quote, Zylergy Solar creates a *work order* from it. You route the work order to one of your own technicians or to a subcontractor.

Table 5-2 Ways to route a work order

ROUTE TO	WHAT HAPPENS
Your own technician	The technician sees the job in the app, with the guided repair and the manual pages.
A subcontractor	The subcontractor gets access to the equipment for that job only. They carry out the guided repair and pass the verification gate in the Zylergy Solar app, as your own technicians do. Their access is recorded.
Print or PDF	You print the work order or save it as a PDF, for example when the work is carried out without the app.

If your company has connected BuildOps, the work order also goes to BuildOps (“Work orders in BuildOps” on page 34). The **Work Orders** tab lists the work orders.

Route a job to a subcontractor

SERVICE COORDINATOR OR SALES · WEB CONSOLE

BEFORE YOU BEGIN

- The job’s quote is signed.
- Your administrator has added the subcontractor to your account.

1. Open the job’s work order.
2. Choose to route it to a subcontractor instead of one of your technicians.
3. Choose the subcontractor.
4. Schedule the visit with the subcontractor.

RESULT

The subcontractor receives the job and access to the equipment it covers. When the job is completed and verified, the outcome goes into the site's service log.

Print a work order

Print a work order, or save it as a PDF, when the job is carried out without the app or when your field-service system cannot be reached.

SERVICE COORDINATOR OR SALES · WEB CONSOLE

1. Open the job's work order.
2. Choose to print it or save it as a PDF.
3. Give the printout or the PDF to the technician.

RESULT

The technician has the work order on paper or as a PDF. The job still has to pass its verification gate before it can be completed and invoiced.

Work orders in BuildOps

If Zylergy's engineers have connected BuildOps for your company, Zylergy Solar sends each work order and its schedule to BuildOps. Status changes made in BuildOps come back into Zylergy Solar and show in the alert queue and on the work order. If BuildOps cannot be reached, print the work order or save it as a PDF.

Zylergy Solar can also connect to other field-service platforms. See the *Zylergy Solar Admin Guide* (ZY-SOL-ADG-01), chapter "Integrations."

5.4 Route and capacity optimization

When you schedule many jobs, Zylergy Solar helps the dispatcher plan the technicians' routes and spread the jobs across their capacity, so that each technician's visits run in a sensible order.

6

CHAPTER 6

Guided repair on site

IN THIS CHAPTER

- Start a job 36
- Confirm the equipment 36
- Open the asset record and its manuals 37
- Follow the steps 37
- Capture proof of fix 39
- Pass the verification gate 39
- Adaptive and hands-free guidance 40
- Quality score 40
- The service log 40

The *guided repair* gives the technician the steps of the job one at a time. The manual page for each step is one tap away. The guided repair asks for the proof the job needs and ends at the *verification gate*, which checks that the repair worked. A technician who has not done a repair before can follow it alone, and your office can see which steps were done.

⚠ WARNING

Fall hazard. Work on roofs and at height can result in death or serious injury from a fall. Use the fall protection your employer requires. Do not use the app while climbing or moving near a roof edge; stop, secure your position, then use the device.

6.1 Start a job

TECHNICIAN, SUBCONTRACTOR · IPAD OR IPHONE · WORKS OFFLINE

BEFORE YOU BEGIN

- The job is assigned to you and packed for offline use (“Pack for offline work” on page 14).

1. On **Home**, tap the visit. The job opens with the Site ID, the job, the homeowner and the address at the top.
2. Read the steps and the equipment the job involves.
3. Open the first step of the guided repair.

RESULT

The guided repair opens at step 1.

6.2 Confirm the equipment

Before you work on a piece of equipment, confirm that it is the equipment in the job. Scan the equipment’s QR tag and compare the make, model and serial number with the nameplate. The asset record opens after you confirm.

TECHNICIAN, SUBCONTRACTOR · IPAD OR IPHONE · WORKS OFFLINE

1. Tap **Scan**.
2. Point the camera at the equipment’s QR tag. The app shows the make, model and serial number of the equipment the tag belongs to.

> ⚠ **CAUTION**
>
> **Wrong equipment.** Working on equipment other than the one shown in the app can cause injury or damage. Before you start, check that the make, model and serial number on the screen match the nameplate.

3. Compare the make, model and serial number on the screen with the nameplate.
4. If any of them does not match, stop and call your office.
5. If they match, confirm the equipment.

RESULT

The equipment’s asset record opens, with its history, manuals and instructions.

If the equipment has no QR tag, compare the serial numbers on the step with the nameplate (“Follow the steps” on page 37). To add a QR tag, see “Register and scan QR tags” on page 47.

6.3 Open the asset record and its manuals

The asset record holds the information for one piece of equipment: its identity and specifications, manuals and repair instructions, maintenance procedures and intervals from the manufacturer's documentation, signed quotes and service history. You open it from the job or by scanning the equipment's QR tag.

TECHNICIAN, SUBCONTRACTOR · IPAD OR IPHONE

1. Scan the equipment's QR tag.
2. Confirm the equipment ("Confirm the equipment" on page 36). The asset record opens.
3. Read the service history for earlier work on the equipment.
4. Open the manuals to read the pages you need.
5. Check the maintenance intervals and what is due.

RESULT

The equipment's asset record is open, with its history, manuals and instructions.

You see manuals only for equipment you have access to. Manuals that your office uploaded are private to your company. If a manual you need is missing, ask your office to add it.

6.4 Follow the steps

Each step shows what to do, the equipment it applies to and the manual page it comes from (Figure 6-1).

TECHNICIAN, SUBCONTRACTOR · IPAD OR IPHONE · WORKS OFFLINE

⚠ WARNING

Electric shock and arc flash. Photovoltaic modules produce voltage whenever they are exposed to light, and DC conductors can remain energized after the AC disconnect is opened. Contact with energized conductors or an arc fault can cause death or serious injury. Only qualified persons may service the array, inverters or connectors. Follow the manufacturer's shutdown procedure, use the personal protective equipment your employer requires, and verify that conductors are de-energized before you touch them.

1. Read the step title and instruction. The progress bar shows which step you are on, for example **Step 3 of 5**.
2. Tap the manual page button under the step. The page the step comes from opens.
3. Read the page, including its cautions.
4. Return to the step.

> **⚠ CAUTION**
>
> **Distraction near moving or energized equipment.** Looking at a screen near rotating, energized or hot equipment can cause injury. Read the step, put the device in a secure place, then do the work.

5. Compare the serial numbers shown on the step with the nameplates.
6. If they do not match, stop and call your office.
7. If they match, do the work the step describes.
8. Go on to the next step.

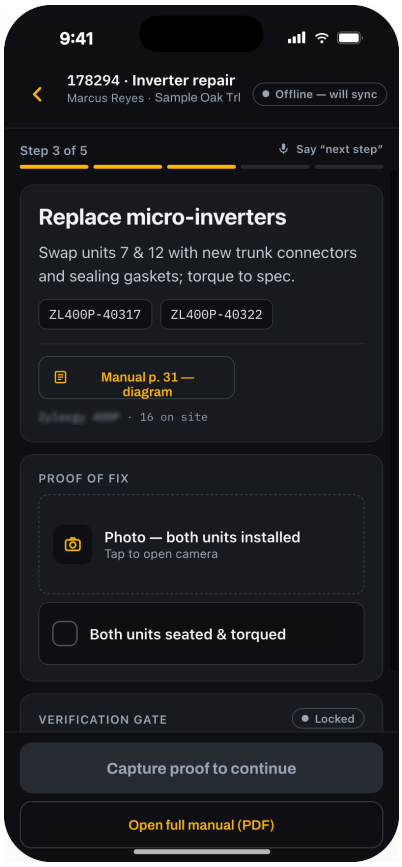


Figure 6-1 A step of the guided repair, with proof of fix and the locked verification gate. Sample data.

RESULT

You reach the step that asks for proof of fix (“Capture proof of fix” on page 39).

The serial numbers on a step identify the units to work on. The line below the manual page button names the model and how many of these units are on site. To read the whole manual, tap **Open full manual (PDF)**.

If a job involves a battery system, this warning applies to each step on the battery or its connections:

> **⚠ WARNING**
>
> **Stored energy.** Battery systems store energy even when the system is switched off and can deliver dangerous current. Short circuits, damage or improper handling can cause fire, burns, electric shock or death. Only qualified persons may service battery systems. Follow the manufacturer’s isolation procedure before you work on a battery or its connections.

6.5 Capture proof of fix

Proof of fix is the photo and checklist that the job asks for at certain steps. Each job has at least one proof-of-fix capture.

TECHNICIAN, SUBCONTRACTOR · IPAD OR IPHONE · WORKS OFFLINE

1. Under **Proof of fix**, tap the photo tile. The camera opens.
2. Take the photo the tile asks for.
3. Check the photo, and retake it if it does not clearly show the work.
4. Select each checklist item when you have done it.

RESULT

The proof is saved with the job. If you are offline, it is sent when your device is back online.

6.6 Pass the verification gate

A job cannot be completed or invoiced until its verification gate passes. The gate shows **Locked** until the proof is in place (Figure 6-1).

TECHNICIAN, SUBCONTRACTOR · IPAD OR IPHONE

1. Under **Verification gate**, check the gate's state. While proof is missing, the button reads **Capture proof to continue** and is unavailable.
2. Capture any proof that is still missing.
3. When the gate unlocks, confirm the repair.

RESULT

The job's status changes to **Completed**. The outcome is written to the site's service log: what was found, what was done, the parts used and the proof.

The gate checks two things:

- **Proof of fix.** Every photo and checklist item the job asks for is captured.
- **Telemetry, where the equipment reports it.** The repaired equipment reports within tolerance. For example, a step of the action plan can require all units to report within tolerance before the gate clears. This check completes when Zylergy Solar receives the telemetry.

If the gate does not unlock, see Chapter 13.

6.7 Adaptive and hands-free guidance

The guided repair adjusts how much detail it shows to the technician's experience and to the job. A technician doing a repair for the first time sees more detail than one who has done it many times.

With *hands-free guidance*, you follow the steps and capture results by voice, with smart glasses or with a body camera. Hands-free guidance is optional. If a hands-free device is not available or stops working, continue on the iPad or iPhone. The steps and proof you have already completed are kept.

6.8 Quality score

When a job is completed, Zylergy Solar gives it a *quality score*. The score is based on the proof of fix and on how the job was carried out. It is recorded with the job as part of the site's service and compliance record, and it helps improve future repair packages.

6.9 The service log

The *service log* is the history of a site. It lists alerts, inspections, repairs, cleaning and commissioning, with the verified outcome of each job. The service log is append-only: entries cannot be edited or deleted. Your office sees it in the **Service Log** panel of an alert ("Alert details" on page 19). The next technician sees it on the site's asset record.

7 CHAPTER 7

Closing the job

IN THIS CHAPTER

- Close-out and billing 41
- Generate and send the invoice 42
- Offer a service plan 42
- Service contracts 43
- Recurring-revenue reporting 43

After the verification gate passes, the job is **Completed** and you can invoice it. At close-out, you also offer the homeowner a service plan.

7.1 Close-out and billing

The lower half of the **Schedule & billing** page shows **Close-out & billing** with the status **Completed** and the date of the verified fix (Figure 5-1).

Table 7-1 The close-out half of the page

AREA	WHAT IT SHOWS
Invoice	The invoice number, the parts and labor lines, the tax, the **Total**, and **Generate invoice** and **Send invoice**.
Renew service	The plan tiers from your plan catalog, each with what it covers and its price, and a **Renew service** button that names the selected tier.
Footer	Confirms that the repair was verified and that proof of fix is on file, and quotes the outcome written to the service log.

7.2 Generate and send the invoice

An invoice can be generated only for a verified job.

SERVICE COORDINATOR OR SALES · WEB CONSOLE

BEFORE YOU BEGIN

- The job's status is **Completed**.

1. Open the **Schedule & billing** page for the alert.
2. Under **Invoice**, check the parts, labor, tax and total.
3. Click **Generate invoice**.
4. Click **Send invoice**.

RESULT

Zylergy Solar generates the invoice, sends it to the homeowner and tracks its payment status.

You can also generate the invoice from the alert with **Generate Invoice**.

Payment status

Zylergy Solar does not collect payments. The homeowner pays your company directly. You track whether each invoice is paid, and you can export the payment status as a CSV or PDF file for your accounting.

7.3 Offer a service plan

A *service plan* is a maintenance agreement that your company offers homeowners. A plan can cover, for example, monitoring and alerts, periodic inspection and cleaning, or parts and labor for certain repairs. The tiers come from your company's plan catalog. The tiers in Figure 5-1 are sample tiers.

SALES · WEB CONSOLE

1. On the **Schedule & billing** page, under **Renew service**, read the tiers with the homeowner.
2. Click the tier the homeowner chooses. The tier is highlighted, and the **Renew service** button names it.
3. Click the **Renew service** button.

RESULT

The homeowner's service contract is created or renewed for the chosen tier.

You can also open the offer from the alert with **Renew Service**.

7.4 Service contracts

A *service contract* is the agreement that results when a homeowner takes a service plan. Zylergy Solar keeps each contract with its renewal date. When the renewal is due, it raises a **Contract** alert in the queue (Chapter 9). Work that a contract covers is linked to the contract.

7.5 Recurring-revenue reporting

Recurring-revenue reporting shows the revenue from your service contracts and maintenance work over time. Read it with the portfolio analytics (“Portfolio analytics” on page 17).

8

CHAPTER 8

Adding equipment

IN THIS CHAPTER

- Capture a nameplate 45
- Enter equipment manually 46
- Register and scan QR tags 47
- Confirm equipment found from telemetry 48

Alerts, repair packages and guided repairs all refer to the asset records of the equipment at a site. An asset record holds the make, model, serial number, location, homeowner and history. Most asset records are created when your administrator connects a site, from your inverter vendor's site data or from the telemetry. Technicians add or correct equipment on site from its nameplate, by typing its details, or with a QR tag. A person confirms the make, model and serial number before a record is created.

Table 8-1 Ways to add equipment

METHOD	WHO	WHERE	WHEN TO USE IT
Nameplate capture	Technician	App	The nameplate is readable. The app reads make, model and serial number and you confirm them ("Capture a nameplate" on page 45).
Manual entry	Technician	App	The nameplate is unreadable or out of reach ("Enter equipment manually" on page 46).

QR tag	Technician	App	Generate and register a tag, so that a later scan opens the asset record (“Register and scan QR tags” on page 47).
From telemetry	Administrator or back office	Web console	Zylergy Solar infers equipment and site details from the telemetry and you confirm them (“Confirm equipment found from telemetry” on page 48).
From the vendor’s site data, single or bulk	Administrator	Web console	When a site is connected. See the *Zylergy Solar Admin Guide* (ZY-SOL-ADG-01), chapter “Connecting sites: authorization and telemetry.”

8.1 Capture a nameplate

The **Add equipment** screen reads an inverter, panel or storage nameplate with the camera and shows what it read, with a confidence for each field (Figure 8-1). You confirm or correct each value before the record is created.

TECHNICIAN · IPAD OR IPHONE · WORKS OFFLINE

BEFORE YOU BEGIN

- You are at the site, and the equipment’s nameplate is safely accessible.

1. Open **Add equipment** for the site. The header shows the site.
2. Frame the nameplate inside the corner marks. When the app has read it, it shows **Nameplate read — confirm below**.
3. If the app does not read the nameplate on its own, tap the shutter button.

> **⚠ CAUTION**
>
> **Wrong equipment.** Working on equipment other than the one shown in the app can cause injury or damage. Before you start, check that the make, model and serial number on the screen match the nameplate.

4. Under **Nameplate read**, compare **Make**, **Model** and **Serial** with the nameplate. A value with lower confidence is outlined and marked with an attention icon.
5. If a value is wrong, tap it and correct it.
6. Tap **Confirm & create asset record**.

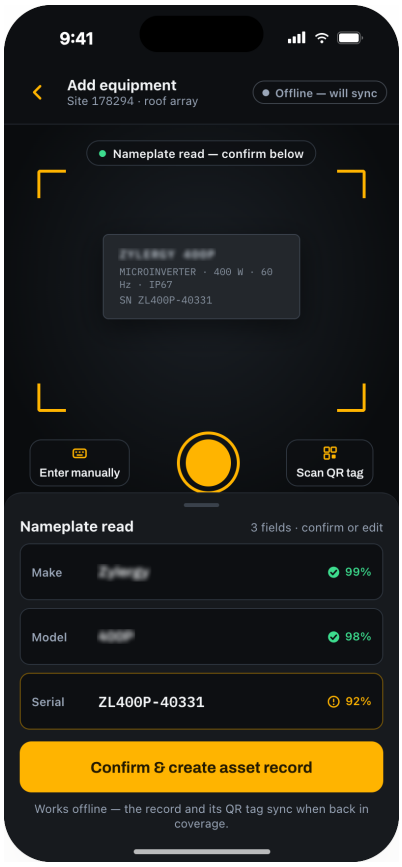


Figure 8-1 Nameplate capture: the values read from the nameplate, each with its confidence, ready to confirm or edit. Sample data.

RESULT

The asset record is created for the site. If you are offline, the record and its QR tag sync when you are back in coverage.

Check each value against the nameplate, even when its confidence is high. Pay most attention to a value that is marked.

8.2 Enter equipment manually

Use manual entry when the nameplate is unreadable, damaged or out of reach.

TECHNICIAN · IPAD OR IPHONE · WORKS OFFLINE

1. On **Add equipment**, tap **Enter manually**.
2. Start typing the make or model. The app suggests matching equipment from the equipment catalog.

3. Choose the matching equipment, or complete the make and model.
4. Enter the serial number.
5. Check the values.
6. Create the asset record.

RESULT

The asset record is created for the site.

8.3 Register and scan QR tags

A *QR tag* is a label with a QR code bound to one asset record. Scanning a registered tag opens the equipment's record, with its history, manuals and instructions. Tags help you identify equipment that is hard to reach or whose nameplate has faded.

Register a QR tag

TECHNICIAN · IPAD OR IPHONE

BEFORE YOU BEGIN

- The equipment has an asset record.
- You have a QR tag to attach.

1. Open the equipment's asset record.
2. Start registering a tag for it.
3. Tap **Scan QR tag**.
4. Scan the new tag.
5. Attach the tag to the equipment where it can be scanned safely.

RESULT

The tag is bound to the asset record. If you are offline, the tag syncs when you are back in coverage.

Scan a QR tag

TECHNICIAN, SUBCONTRACTOR · IPAD OR IPHONE

1. Tap **Scan**, or tap **Scan QR tag** on **Add equipment**.
2. Point the camera at the tag. The app shows the make, model and serial number of the equipment the tag belongs to.
3. Compare them with the nameplate.
4. If they match, confirm the equipment.

RESULT

The asset record opens.

If they do not match, do not confirm. The tag may be on the wrong equipment. Tell your office. For more on confirming equipment, see “Confirm the equipment” on page 36. If **Read QR / barcode first** is turned on in your settings, the camera looks for a QR tag before it reads nameplate text.

8.4 Confirm equipment found from telemetry

For a connected site, Zylergy Solar can work out much of the equipment and site configuration from the telemetry and fill in the asset records. These inferred values are proposals until a person confirms them. For anything the telemetry does not show, use the vendor’s site data, nameplate capture or manual entry.

ADMINISTRATOR OR SALES · WEB CONSOLE

1. Open the site whose equipment was inferred.
2. Review each inferred value.
3. Correct any value that is wrong.
4. Confirm the values.

RESULT

The asset records are created or completed with the confirmed values.

9

CHAPTER 9

Maintenance and contract jobs

IN THIS CHAPTER

- Maintenance interval alerts 49
- Proactive alerts before a failure 50
- Warranty and contract alerts 50
- Sell a maintenance or contract job 50

Maintenance intervals, warranty dates and contract renewals also raise alerts. They appear in the alert queue with the failure alerts (Figure 3-2). You sell, schedule and carry out these jobs as you do a repair.

9.1 Maintenance interval alerts

Zylergy Solar takes the maintenance scope and intervals for each type of equipment from the manufacturer's documentation, for example panel cleaning or an annual inspection. When a task falls due, it raises an alert for the site. You can trace the interval behind an alert to the manual it comes from.

Zylergy Solar refines intervals over time from the failure history across the installed base. Where the data supports it, a task can fall due earlier or later than the manufacturer's baseline. Your administrator or Zylergy can override an interval. Each override is recorded. See the *Zylergy Solar Admin Guide* (ZY-SOL-ADG-01), chapter "Detection and maintenance."

The **Overview** shows maintenance that is due under **Due & overdue maintenance**, marked **Overdue**, **Due soon** or **Contract** (Figure 3-1).

9.2 Proactive alerts before a failure

For components that wear out, Zylergy Solar raises an alert before the projected end of their remaining useful life (“Remaining useful life” on page 23). You can then offer a repair or replacement while the system is still producing, and schedule it at a time that suits the homeowner and your technicians.

9.3 Warranty and contract alerts

Zylergy Solar raises an alert when a warranty is about to expire or a service contract renewal is due. These alerts have the level **Contract**. A warranty alert lets you offer an inspection while the warranty still covers the equipment. A renewal alert is your cue to renew the homeowner’s service plan (“Offer a service plan” on page 42).

9.4 Sell a maintenance or contract job

SALES · WEB CONSOLE

1. On the **Alerts** tab, click **Contract** to show warranty and contract alerts, or **All** to include maintenance intervals.
2. Click the row of the alert.
3. Review the site, the equipment and the service log.
4. Call the homeowner.
5. For a maintenance task, click **Generate Quote** and continue as for a repair (Chapter 4).
6. For a contract renewal, click **Renew Service** and offer the plan (“Offer a service plan” on page 42).

RESULT

The maintenance job is quoted and can be scheduled, or the homeowner’s service contract is renewed.

The technician carries out a maintenance job with the guided repair and passes its verification gate (Chapter 6). The outcome goes into the site’s service log, and the next due date moves forward.

10 CHAPTER 10

Stock and parts

IN THIS CHAPTER

- The recommended stock list 51
- Parts on hand for a job 51
- Export the bill of materials for ordering 52
- Order parts from a distributor 52

One visit is enough only if the technician has the right parts on the truck. Zylergy Solar recommends what to keep in stock and shows whether a job's parts are likely on hand. You can export the bill of materials for ordering or send it to a connected distributor. Zylergy Solar does not buy or resell parts. You order from your own suppliers, on your own account.

10.1 The recommended stock list

The *recommended stock list* shows the standard parts and consumables your company should keep on hand. It is based on the equipment in your fleet and the problems detected in it. Beyond the parts for open jobs, it forecasts what your fleet is likely to need before the alerts arrive, and it recommends stock levels and when to restock.

The forecast uses the makeup of your fleet, the remaining useful life of its components and the patterns of detected problems. It changes as your fleet and your job outcomes change.

10.2 Parts on hand for a job

When Zylergy Solar builds a repair package, it indicates for each part in the bill of materials whether the part is likely to be on hand. The estimate comes from the recommended stock list. Use it to decide whether to order parts before you schedule the visit.

10.3 Export the bill of materials for ordering

You can export a job's bill of materials for your own parts ordering.

SERVICE COORDINATOR OR SALES · WEB CONSOLE

1. Open the repair package for the job.
2. Under **2 · Bill of materials**, check the parts and quantities.
3. Export the bill of materials as a CSV or PDF file.
4. Order the parts from your supplier.

RESULT

The parts are on order with your supplier. When they arrive, check them off for the visit under **Parts ready — on the truck** ("Parts for the visit" on page 32).

10.4 Order parts from a distributor

If your administrator has connected your distributor account, you can order a job's bill of materials from the distributor in Zylergy Solar. The order is placed on your company's own account and terms. Zylergy Solar passes the order to the distributor and is not the buyer. The order is checked against your recommended stock.

SERVICE COORDINATOR OR SALES · WEB CONSOLE

BEFORE YOU BEGIN

- Your company's distributor account is connected.

1. Open the repair package for the job.
2. Under **2 · Bill of materials**, check the parts and quantities.
3. Send the bill of materials to your distributor as an order.
4. Confirm the order with the distributor.

RESULT

The order is placed with the distributor on your company's account.

Distributor connections use the distributor's ordering interface, electronic data interchange or punchout.

11 CHAPTER 11

The homeowner portal

IN THIS CHAPTER

- What homeowners see 53
- Share with my installer 55
- When a homeowner asks about the portal 55

In the *homeowner portal*, a homeowner sees the health of their own solar system. Your company does not work in the portal. Knowing what the homeowner sees there helps you on the call.

11.1 What homeowners see

The portal shows one site on one page (Figure 11-1).

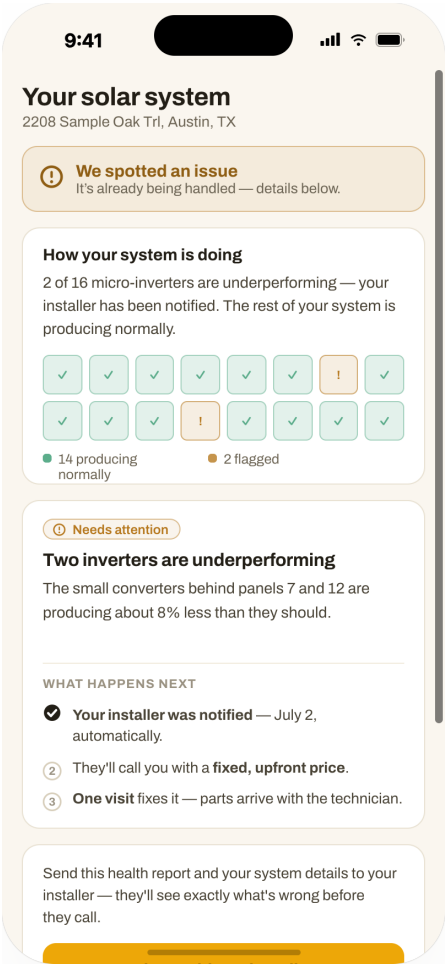


Figure 11-1 The homeowner portal: the health of the system, an alert and what happens next, and sharing with the installer. Sample data.

Table 11-1 What is in the homeowner portal

AREA	WHAT IT SHOWS
Your solar system	The site address.
Status banner	Whether an issue was found and whether it is being handled.
How your system is doing	A plain-language summary and one tile for each panel, with how many are producing normally and how many are flagged.
Alert card	A short heading for the problem, marked **Needs attention**, and an explanation in everyday words.
What happens next	The next steps: the installer has been notified, will call with a fixed, upfront price, and plans one visit with the parts.

Share card	A short explanation and the button **Share with my installer**.

The portal shows the site's actual degradation and alerts as well as its production. It describes the problem your office sees in words a homeowner understands. Expect the homeowner to have read it before you call.

Homeowners can also see and manage the authorization they gave Zylergy Solar to read their system's telemetry, and they receive reports on their system.

11.2 Share with my installer

A homeowner can share the system's health report and details with an installer. This way, a homeowner can reach an installer if theirs does not use Zylergy Solar or if they want a different one.

When a homeowner taps **Share with my installer**, the site and its alerts go to the installer. If that installer is your company, the site appears in your alert queue as a new alert. Work it like any other alert ("Open an alert" on page 21).

11.3 When a homeowner asks about the portal

Table 11-2 Common homeowner questions

QUESTION	ANSWER
Why did you call before I noticed anything?	Zylergy Solar found the problem in the system's telemetry. The portal shows the same finding.
Is the price on the quote fixed?	Yes. The homeowner gets a fixed price before the visit. The exception is something unusual that the technician finds on site and that the telemetry could not show. The technician then explains it and quotes the extra work on the spot.
What do the flagged tiles mean?	Each tile is a panel. Flagged tiles are panels, or the inverters behind them, that are producing less than they should or have stopped reporting.
Is my system safe?	The portal describes how the system is performing. It does not assess electrical safety. If the homeowner reports damaged or unusual equipment, follow your company's procedures.

How do I stop sharing my data?	The homeowner can revoke the authorization for their site. Zylergy Solar then stops reading the site's telemetry.

12 CHAPTER 12

Screen reference

IN THIS CHAPTER

- Web console 57
- App on iPad or iPhone 59
- Homeowner portal 64

Each entry gives the screen's purpose, how to get there, what is on it and what you can do. Phone screens appear beside their entries. Web console entries refer to the figures earlier in this guide.

12.1 Web console

Header

- **Purpose.** Moves between the main parts of the web console and finds any site, serial number or customer.
- **How to get there.** It is at the top of every page (Figure 2-1).
- **What is on it.** The Zylergy wordmark, the tabs **Overview**, **Alerts**, **Quotes**, **Work Orders**, **Customers** and **Sites** (the active tab is underlined), and the search field **Search sites, serials, customers…**.
- **Actions.** Click a tab to open it. Enter a Site ID, a serial number or a customer name in the search field.

Overview

- **Purpose.** Shows the health of your fleet and what to deal with first.
- **How to get there.** Click **Overview** in the header (Figure 3-1).

- **What is on it.** The time of the last telemetry sync and the summary figures **Sites monitored**, **Open alerts**, **Jobs in flight**, **Service revenue** and **First-time-fix rate**. The areas **Needs attention**, **Fleet health**, **Due & overdue maintenance** and **Recent activity** (Table 3-1).
- **Actions.** Click **Open alert queue**.

Alert queue

- **Purpose.** Lists the alerts for your sites, with the status of each job.
- **How to get there.** Click **Alerts** in the header, or **Open alert queue** on the **Overview** (Figure 3-2).
- **What is on it.** The title **Alert queue** with the number of sites, the filters **All**, **Failure** and **Contract** with their counts, the **Severity: All** list, and the columns **Site ID**, **Status**, **Level** and **Problem** (Table 3-2).
- **Actions.** Filter the queue (“Filter and search the queue” on page 19). Click a row to open the alert’s details.

Alert details

- **Purpose.** Shows the site, the homeowner, the equipment, the problem and the history for one alert.
- **How to get there.** Click a row in the alert queue (Figure 3-3).
- **What is on it.** The site panel with **Site**, **Homeowner**, the site address and install date, and **Equipment**. Below the queue, the panels **Equipment List**, **Failure Description** and **Service Log** (Table 3-5).
- **Actions. Generate Quote** (“Generate and edit a repair package” on page 27), **Renew Service** (“Offer a service plan” on page 42) and **Generate Invoice** (“Generate and send the invoice” on page 42). Click the phone number or the email address to contact the homeowner.

Repair package

- **Purpose.** Review and edit the job and its price, and send the quote.
- **How to get there.** Click **Generate Quote** on an alert. The path reads **Alerts** / Site ID / **Repair package** (Figure 4-1).
- **What is on it.** The header with the level, the problem and the **Homeowner** block, followed by **1 · Action plan**, **2 · Bill of materials**, **3 · Labor** and **4 · Quote summary** (Table 4-1).
- **Actions. Edit steps**, **Adjust scope / price**, **Save draft** and **Send quote to homeowner**. You can also change quantities and hours.

Schedule & billing

- **Purpose.** Book the visit for a signed job, and close out the verified job.
- **How to get there.** Open it from the alert. The path reads **Alerts** / Site ID / **Schedule & billing** (Figure 5-1).
- **What is on it.** At the top: **Schedule the visit**, **Assign technician**, **Parts ready — on the truck** and **Visit** (Table 5-1). Below: **Close-out & billing** with **Invoice** and **Renew service**, and the verification footer (Table 7-1).
- **Actions.** **Confirm & schedule**, **Generate invoice** and **Send invoice**. Choose a tier and click the **Renew service** button.

Quotes, Work Orders, Customers and Sites

- **Purpose.** Lists of your quotes, work orders, homeowners and sites, and their details.
- **How to get there.** Click the tab in the header.

12.2 App on iPad or iPhone

Sign-in

- **Purpose.** Signs you in with your work email.
- **How to get there.** Open the app when you are not signed in (Figure 12-1).
- **What is on it.** **Work email** and **Continue**, a note on single sign-on, the offer of Face ID after the first sign-in, a pointer to the invitation in your email, and **Help**.
- **Actions.** Sign in (“Sign in to the app” on page 9).

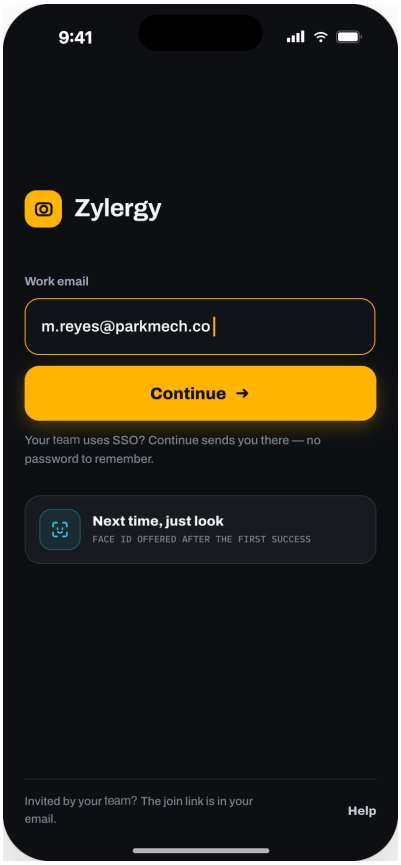


Figure 12-1 The sign-in screen. Sample data.

First run

- **Purpose.** Asks for camera access once, and explains why.
- **How to get there.** Appears after your first sign-in (Figure 12-2).
- **What is on it.** What the camera is used for, **Enable the camera** and **Not now — I'll type it in**.
- **Actions.** Allow the camera, or continue without it ("First run and permissions" on page 11).

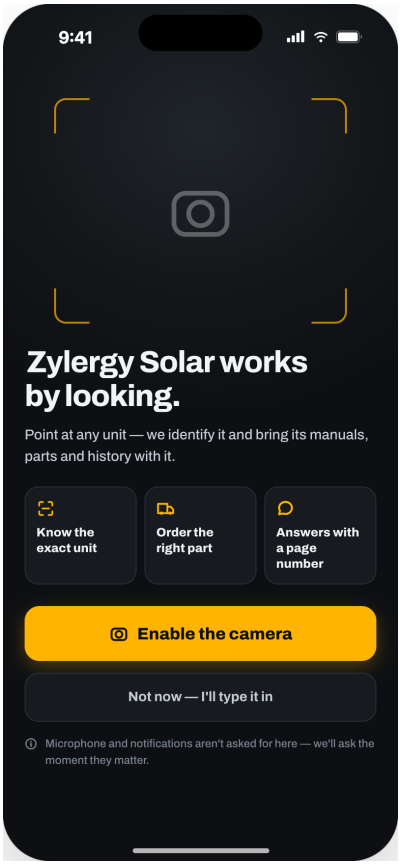


Figure 12-2 The first-run screen. Sample data.

Home

- **Purpose.** Shows your work for the day.
- **How to get there.** Tap **Home** in the bottom bar.
- **What is on it.** Your visits for the day, work you paused, what changed since you last looked, and the time of the last pack.
- **Actions.** Tap a visit to open its job, or resume paused work.

Add equipment

- **Purpose.** Creates an asset record from a nameplate, by typing, or from a QR tag.
- **How to get there.** From the site, when you add equipment (Figure 12-3).
- **What is on it.** The header with the site and the connection chip. The camera view with corner marks and the status **Nameplate read — confirm below**. **Enter manually**, the shutter button and **Scan QR tag**. The **Nameplate read** sheet with **Make**, **Model** and **Serial**, the confidence of each, and **Confirm & create asset record**. A note that the record and its QR tag sync when you are back in coverage.
- **Actions.** Capture a nameplate (“Capture a nameplate” on page 45), enter equipment manually (“Enter equipment manually” on page 46) or scan a QR tag (“Scan a QR tag” on page 47).

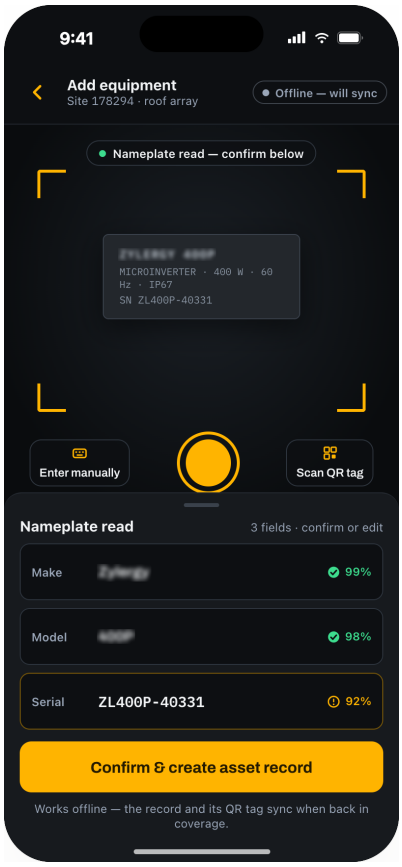


Figure 12-3 Add equipment, with the values read from a nameplate. Sample data.

Guided repair

- **Purpose.** Carries out a job step by step, with proof of fix and the verification gate.
- **How to get there.** Tap a visit on **Home** and start the job (Figure 12-4).
- **What is on it.** The header with the Site ID, the job, the homeowner, the address and the connection chip. The step counter and progress bar. The step title, the instruction and the serial numbers it applies to. The manual page button, with the model and quantity on site. **Proof of fix** with the photo tile and checklist items. **Verification gate** with its state, and **Capture proof to continue** or the confirm control. **Open full manual (PDF)**.
- **Actions.** Follow the steps (“Follow the steps” on page 37), capture proof of fix (“Capture proof of fix” on page 39) and pass the verification gate (“Pass the verification gate” on page 39).

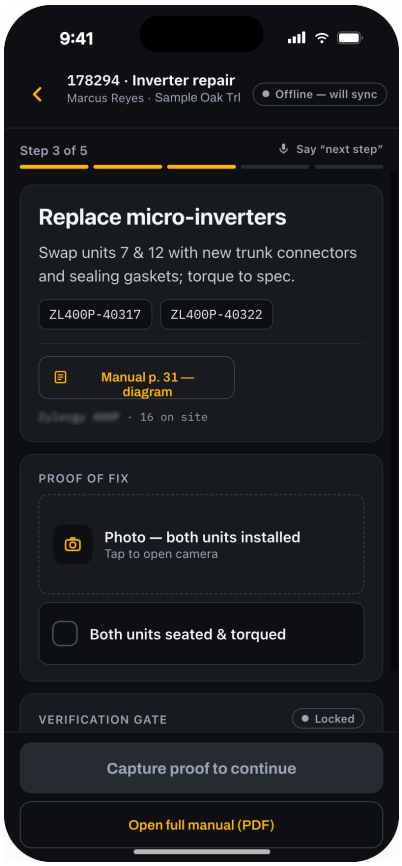


Figure 12-4 The guided repair at a step with proof of fix. Sample data.

Settings

- **Purpose.** Your personal device settings.
- **How to get there.** Tap **Menu**, then your account.
- **What is on it.** Appearance, scanning, offline storage and notification settings, and **Sign out** (Table 2-7).
- **Actions.** Change a setting, or sign out.

Offline & pack

- **Purpose.** Puts your jobs and their manual pages on the device for offline use.
- **How to get there.** Tap **Menu** > **Offline & pack**.
- **What is on it.** Today’s jobs with their sizes and offline state, and **Pack now**.
- **Actions.** Pack for offline work (“Pack for offline work” on page 14).

12.3 Homeowner portal

Your solar system

- **Purpose.** Shows a homeowner the health of their system, any alert and what happens next.
- **How to get there.** The homeowner signs in to the homeowner portal (Figure 12-5).
- **What is on it. Your solar system** with the address, the status banner, **How your system is doing** with the panel tiles, the alert card marked **Needs attention**, **What happens next**, and the share card (Table 11-1).
- **Actions. Share with my installer** (“Share with my installer” on page 55).

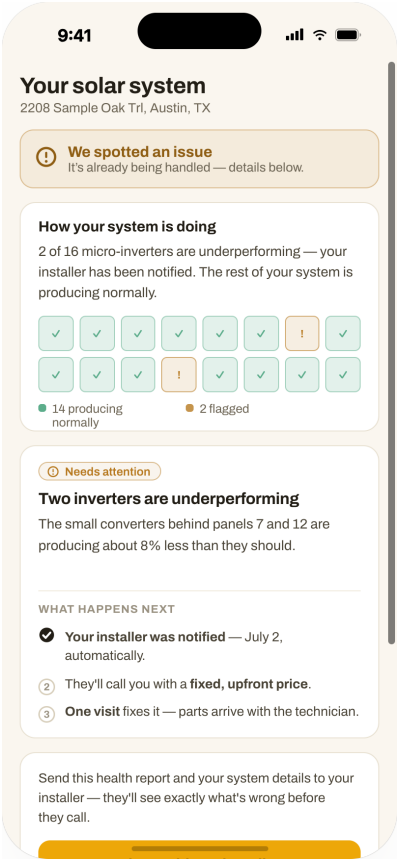


Figure 12-5 The homeowner portal. Sample data.

13 CHAPTER 13

Troubleshooting

Table 13-1 Troubleshooting in the web console

WHAT YOU SEE	WHY	WHAT TO DO
A site you expect is missing from the alert queue	The site is not connected, the homeowner revoked the authorization, or you do not have access to it.	Ask your administrator to check the site's connection and your access.
No new alerts for a site that had alerts before	The site's telemetry feed has a gap or has stopped, or its authorization was revoked.	Ask your administrator to check the site's connection and authorization.
The telemetry sync time on the **Overview** is old	Zylergy Solar has not received recent telemetry from your inverter vendor's system.	Wait and refresh the page. If the time does not change, ask your administrator to contact Zylergy support.
The status stays **Open** after you sent the quote	The homeowner has not signed yet. **Quoted** appears only after the signature.	Call the homeowner. Check that the quote reached them.
Generate Quote builds a package without some equipment	The site's asset records are incomplete.	Ask a technician to add the missing equipment (Chapter 8), then generate the package again.
A technician is missing from **Assign technician**	The technician is not available in that week, or does not have access to the site's equipment.	Choose another slot or technician, or ask your administrator to grant access.
You cannot generate an invoice	The job has not passed the verification gate.	Check the job's status. An invoice can be generated only for a **Completed** job.

The work order did not appear in BuildOps	The connection to BuildOps is not set up or not working.	Print the work order or save it as a PDF, and ask your administrator to check the connection.
A quote shows the wrong labor rate or part price	The pricebook or labor rates are out of date.	Correct the quote with **Adjust scope / price**, and ask your administrator to update the pricebook.

Table 13-2 Troubleshooting in the app

WHAT YOU SEE	WHY	WHAT TO DO
The app says that sign-in needs a signal	Signing in needs a network connection.	Move to where you have coverage, or use Wi-Fi. Work already on the device opens read-only.
The app does not recognize your email address	The address is not on an invitation.	Check the address. If it is correct, ask your administrator to invite you.
A job assigned to you is not on **Home**	The job has not reached the device yet, or you do not have access to its equipment.	Connect to a network and pack again. If the job is still missing, call your office.
No camera view on **Scan** or **Add equipment**	Camera access is not allowed.	Allow camera access for Zylergy Solar in the Settings app on your device. Use **Enter manually** in the meantime.
The app reads a value on the nameplate wrongly	Glare, dirt or a worn nameplate.	Correct the value before you tap **Confirm & create asset record**, or use **Enter manually**.
A scanned QR tag shows equipment that does not match the nameplate	The tag is on the wrong equipment, or the record is wrong.	Do not confirm. Tell your office.
The serial numbers on a step do not match the nameplates	The equipment at the site differs from the site's records.	Do not continue. Call your office so that the records and the job can be corrected.
A manual page does not open offline	The job was not packed before you lost coverage.	Pack again over Wi-Fi ("Pack for offline work" on page 14). Use the printed manual if you have it.
The verification gate stays **Locked**	Proof of fix is missing.	Capture every photo and checklist item the job asks for.

The gate does not clear after all proof is captured	The job also needs telemetry to show that the repaired equipment reports within tolerance, and the data has not arrived or is out of tolerance.	Check the installation against the manual. Get back into coverage so the app can send the outcome. If the gate still does not clear, call your office.
The app shows **Offline — will sync** for a long time	The device has no connection.	Your work is saved on the device. Get back into coverage before you sign out or reset the device.
Hands-free guidance stops responding	The hands-free device is disconnected or not supported.	Continue on the touch screen. Steps and proof already captured are kept.

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.

adaptive guidance

Guidance that shows more or less detail for a step depending on the technician's experience and the job, without changing the proof required.

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.

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.

hands-free guidance

Following guidance and capturing results by voice or with smart glasses instead of the touch screen.

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.

Level

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

lockout/tagout

The procedure of isolating equipment from its energy sources, locking and tagging the isolation point, and verifying zero energy before work begins.

machine-sensed

Detected by Zylergy Solar from telemetry, as marked on alerts and repair packages.

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.

recommended stock list

The parts and consumables Zylergy Solar recommends you keep on hand, forecast from your fleet and detected problems.

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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