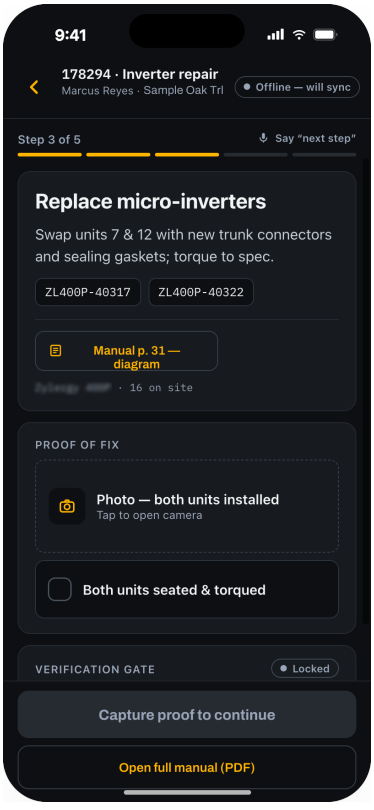
ZYLERGY

QUICK START GUIDE

Zylergy Solar

Quick Start Guide

For solar service teams using Zylergy Solar in the web console and on iPad or iPhone



SAMPLE DATA.

ZYLERGY

Zylergy, Inc.
Lewes, Delaware zylergy.com

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

Zylergy Solar Quick Start Guide
Document number ZY-SOL-QSG-01, Revision A
Release 1.0 · October 2026

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Sample data. Screens in this document show sample data. The people, companies, sites, equipment, order numbers, readings and amounts on them are illustrative and do not describe any customer. Some third-party equipment names on screens are blurred.

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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 new Zylergy Solar users at a solar installation or service company. It is written for sales staff and service coordinators in the web console, and for technicians who carry out repairs with the app on iPad or iPhone. The guide takes you from your first sign-in through one complete job, from a telemetry alert to a quoted, scheduled, verified and invoiced repair. It assumes that you know how to sell and service solar equipment. Administrators should start with the *Zylergy Solar Admin Guide*. For the full range of daily work, see the *Zylergy Solar Operator Guide*.

How this guide is organized

- Chapter 1, “Safety information,” gives the safety messages for work at a site.
- Chapter 2, “Before you start,” explains what Zylergy Solar does, who works where and what you need before you sign in.
- Chapter 3, “Sign in and set up,” covers first sign-in on iPad or iPhone and in the web console, camera access, the app’s main screens and offline preparation.
- Chapter 4, “Your first job,” follows one repair from the alert in the queue to the invoice and the service-plan offer.
- Chapter 5, “Where to go next,” points to the tasks you will do next, how to get help and what to do when something does not work.
- The Glossary and the Index follow Chapter 5.

Documentation set

DOCUMENT	NUMBER	FOR
Zylergy Solar Quick Start Guide (this guide)	ZY-SOL-QSG-01	New users: first sign-in and a first job
Zylergy Solar Operator Guide	ZY-SOL-OPG-01	Everyday work in the app and the web console, and a reference for every screen
Zylergy Solar Admin Guide	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-QSG-01), the revision (A) and the page number.

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1

CHAPTER 1

Safety information

IN THIS CHAPTER

- General safety messages 1
- Content in the app and in this guide 2

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 Content in the app and in this guide

Each repair step in Zylergy Solar refers to a page in the manufacturer's manual for the equipment. Open that page and read its cautions before you do the step. If the app shows no caution for a step, check the manufacturer's documentation anyway. A caution can apply even when the app does not show one.

Zylergy Solar builds alerts, repair steps and parts lists from telemetry and from the manuals in your organization's records. No alert, step or parts list tells you that equipment is safe to touch. Treat every conductor as energized until you have verified that it is not.

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

2

CHAPTER 2

Before you start

IN THIS CHAPTER

- What Zylergy Solar does 4
- Who works where 5
- What you need 6
- What works without a signal 6

2.1 What Zylergy Solar does

Zylergy Solar reads the telemetry from your customers' solar systems and turns it into repair and maintenance jobs. Your company quotes, schedules, carries out and invoices those jobs. Each job is planned so that one visit can complete it.

- Monitoring: inverters and batteries report operating data through the manufacturer's system. This data is the *telemetry*. With each homeowner's authorization, Zylergy Solar reads it for the sites you look after.
- Alerts: Zylergy Solar detects failed equipment, equipment that is about to fail, systems that produce less than they should, and equipment that has stopped reporting. Maintenance intervals, warranty dates and contract renewals also create work. Each item becomes an *alert* in the *alert queue*.
- Repair packages: for each alert, Zylergy Solar builds a *repair package*. It holds an *action plan* whose steps refer to pages in the equipment manual, a *bill of materials*, the labor and a *quote* you can edit.
- Quotes: you call the homeowner with the price and send the quote. The homeowner signs it electronically.
- Scheduling: you book a slot, assign a technician and check that the parts are ready.

- Guided repair: on site, the technician follows the *guided repair* on an iPad or iPhone, with the manual page for each step one tap away. The technician captures *proof of fix* and passes the *verification gate*.
- Invoices and service plans: you invoice the verified job and offer the homeowner a *service plan*.
- Service log: each verified outcome goes into the site's *service log*, where the next person who works on the site sees it.

Jobs are sold at a fixed, upfront price, which the homeowner gets before the visit. The exception is something unusual the technician finds on site that the telemetry could not show.

2.2 Who works where

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

Each person holds one or more *roles*: **Admin**, **Back office**, **Field tech** or **Customer**. Your administrator gives the people in your company their roles. Homeowners hold **Customer**. Table 2-1 shows who usually has which role.

Table 2-1 People and where they work

PERSON	ROLE	WORKS IN	TYPICAL WORK
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, assigns technicians, checks that parts are ready, issues invoices.
Technician	**Field tech**	Zylergy Solar app on iPad or iPhone	Carries out guided repairs and maintenance, captures proof of fix, adds equipment.
Subcontractor	**Field tech**, with access grants	Zylergy Solar app on iPad or iPhone	Carries out a job routed to them and sees only the equipment for that job.
Administrator	**Admin**	Web console	Manages users and access grants, site authorization and vendor connections, settings, integrations and security.
Homeowner	**Customer**	Homeowner portal	Sees the health of their system and what happens next. Can share the system with an installer.

Sales usually does most of the back-office work and, in a small company, the scheduling as well. Larger companies add a service coordinator or dispatcher for scheduling. Administration is separate, technical work, but one person can hold both **Back office** and **Admin**. The line under each task title names who does the task and where.

2.3 What you need

Table 2-2 What you need before you sign in

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.
For technicians: 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 for the first sign-in	Signing in needs a signal. After that, the guided repair also works offline (Table 2-3).
Camera access (technicians)	The app uses the camera to read nameplates, scan QR tags and photograph proof of fix. If you do not allow it, you can type equipment details instead.

2.4 What works without a signal

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**.

Table 2-3 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	Everything in the web console
Capturing proof of fix: photos and checklist items (sent when you are back online)	New alerts and current telemetry

Reading a nameplate and creating an asset record (the record and its QR tag sync when you are back online)	The telemetry check of the verification gate, where the job has one

3

CHAPTER 3

Sign in and set up

IN THIS CHAPTER

- Sign in on iPad or iPhone 8
- Allow the camera 10
- Find your way around the app 11
- Prepare your device for offline work 11
- Sign in to the web console 12

3.1 Sign in on iPad or iPhone

The sign-in screen asks only for your work email (Figure 3-1). The next steps depend on how your company has set up sign-in.

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.

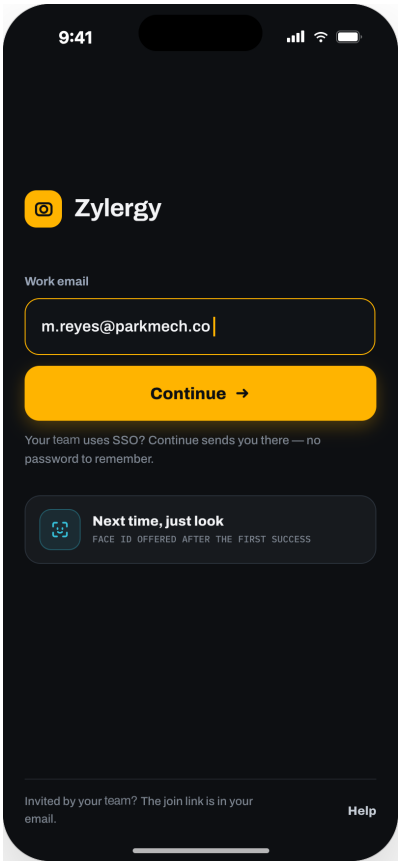


Figure 3-1 The sign-in screen. Sample data.

RESULT

You are signed in, and the app asks for camera access ("Allow the camera" on page 10).

> NOTE
> If the app says that it does not recognize your address, check the email address you entered. If it is correct, ask your administrator to invite you.

3.2 Allow the camera

The first time you open the app, it asks for camera access (Figure 3-2). It 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.

To skip the camera for now, tap **Not now — I'll type it in** and type equipment details instead. To allow camera access later, use the Settings app on your device.

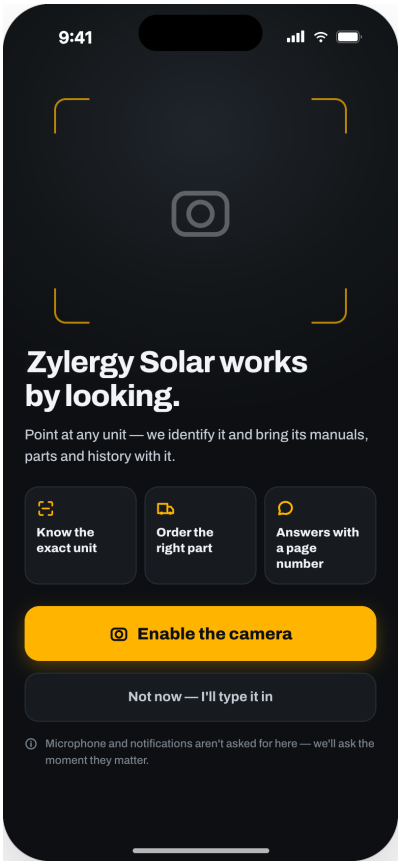


Figure 3-2 The first-run screen asks for camera access. Sample data.

3.3 Find your way around the app

The bar at the bottom of the app has four tabs (Table 3-1).

Table 3-1 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.
Your jobs	The work orders routed to you.
Menu	Notifications, your account and settings, offline storage and **Help**.
The guided repair	Opens when you start a job. You follow the steps, open the manual pages and capture proof of fix here.

Your device settings, such as **Glove**, **Text LG**, **Contrast**, the color schemes and notifications, are in **Menu**, under your account. See the *Zylergy Solar Operator Guide* (ZY-SOL-OPG-01), chapter “Getting to know Zylergy Solar.”

3.4 Prepare your device for offline work

Packing stores your assigned jobs on the device, with the manual pages their steps refer to. Pack before you leave, and pack again if your visits change.

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.

> TIP
> Pack at your office or at home over Wi-Fi before your first visit.

3.5 Sign in to the web console

Sales, service coordinators and administrators work in the web console. Technicians do not need it for the first job.

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

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. The header shows the tabs **Overview**, **Alerts**, **Quotes**, **Work Orders**, **Customers** and **Sites**, and a search field.

4

CHAPTER 4

Your first job

IN THIS CHAPTER

- Check the fleet on the Overview 13
- Find the alert in the queue 14
- Review the alert 16
- Generate the repair package and edit the quote 17
- Send the quote to the homeowner 19
- Schedule the visit with the parts ready 19
- Start the job on site 21
- Follow the guided repair 21
- Capture proof of fix and pass the verification gate 22
- Invoice the job and offer a service plan 23

In this example, telemetry shows that two micro-inverters at one site are degrading. Sales picks up the alert, builds the quote, calls the homeowner with the price and sends the quote. The homeowner signs it. A service coordinator, or sales in a smaller company, books one visit with the parts ready. The technician carries out the guided repair on an iPad and passes the verification gate. The office then invoices the job and offers a service plan.

The three tasks at the site are done in the app. All other tasks in this chapter are done in the web console.

4.1 Check the fleet on the Overview

The **Overview** tab shows the health of the sites you monitor and which sites need attention first (Figure 4-1).

SALES · WEB CONSOLE

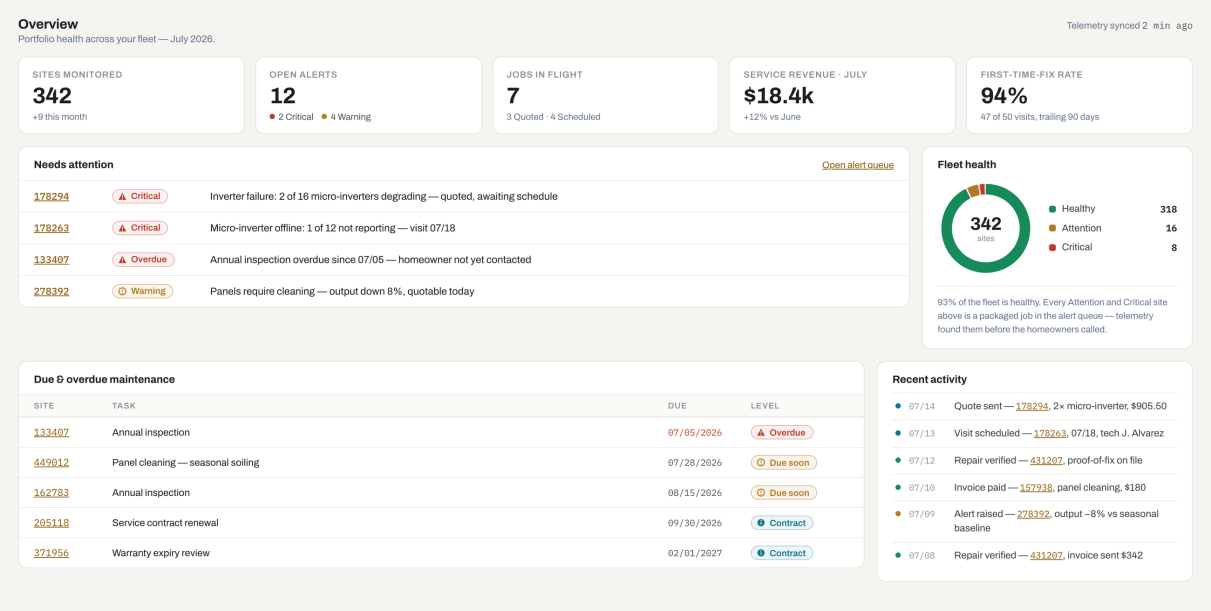


Figure 4-1 The Overview tab: summary figures, the sites that need attention, fleet health, maintenance that is due, and recent activity. Sample data.

1. In the header, click **Overview**.
2. Next to the page title, check when telemetry was last synchronized.
3. Under **Needs attention**, read the sites at the top of the list.
4. Click **Open alert queue**.

RESULT

The **Alerts** tab opens with the alert queue.

4.2 Find the alert in the queue

The *alert queue* lists the alerts for your sites, one row per site (Figure 4-2). Each row shows the **Site ID**, the **Status** of the job, the **Level** and the **Problem**.

SALES · WEB CONSOLE

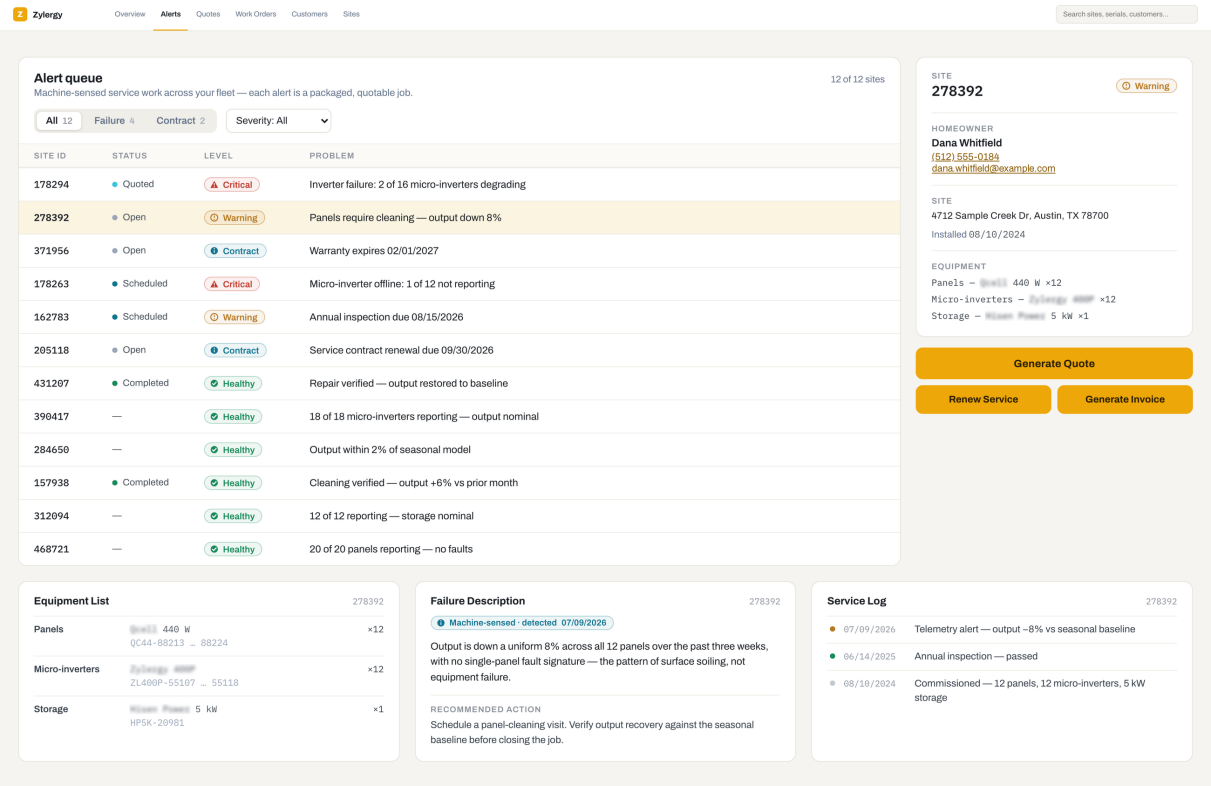


Figure 4-2 The alert queue on the Alerts tab, with one alert selected and its details below and to the right. Sample data.

1. Above the queue, click **Failure** to show only failure alerts.
2. To show only the most severe alerts, choose a level in the **Severity: All** list.
3. Click the row of the alert you want to work on. The row is highlighted. The site's details open in the panel on the right and in the panels below the queue.

RESULT

The alert is selected and its details are shown ("Review the alert" on page 16).

Table 4-1 Status values

STATUS	MEANING
Open	The alert has no signed quote yet.
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 is assigned.
Completed	The repair passed the verification gate and its outcome is on the service log.

Table 4-2 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.
Contract	A date-based alert, such as a warranty that expires or a service contract renewal that is due.

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.

4.3 Review the alert

The panel on the right and the three panels below the queue show the site, the homeowner, the equipment and the problem (Figure 4-3). Read them before you call the homeowner.

SALES · WEB CONSOLE

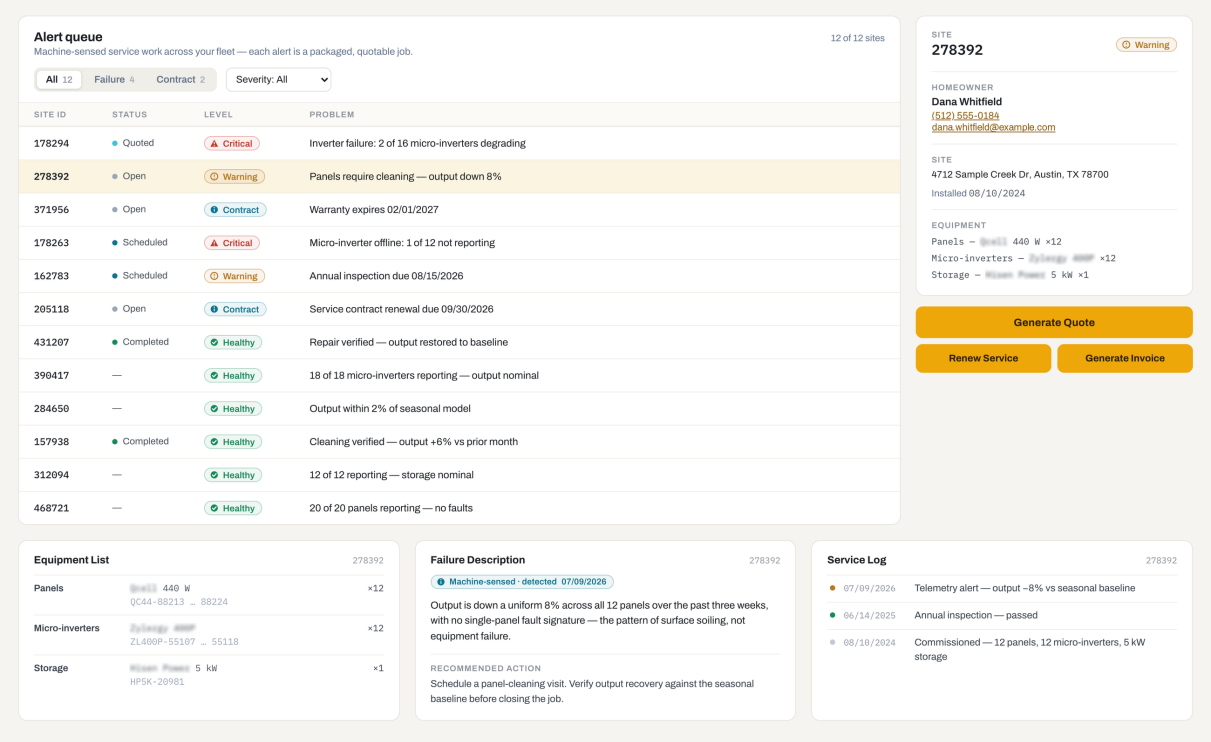


Figure 4-3 The details of a selected alert, with the site, homeowner and equipment on the right and the equipment list, failure description and service log below. Sample data.

Table 4-3 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 ("Generate the repair package and edit the quote" on page 17).
Renew Service and **Generate Invoice**	Offer a service plan and invoice a completed job. You use them at the end of the job ("Invoice the job and offer a service plan" on page 23).
Equipment List	Each type of equipment with its model, serial number range and 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: earlier alerts, inspections, repairs and commissioning.

The *site* groups all the equipment at one homeowner's property. Each piece of equipment has an *asset record* with its make, model, serial number, location and history.

> TIP
> Generate the repair package before you call the homeowner ("Generate the repair package and edit the quote" on page 17). You can then give the homeowner the fixed price on the call, before you send the quote.

4.4 Generate the repair package and edit the quote

Generate Quote builds the repair package for the alert. The package has an action plan, a bill of materials, the labor and a quote summary (Figure 4-4).

SALES · WEB CONSOLE

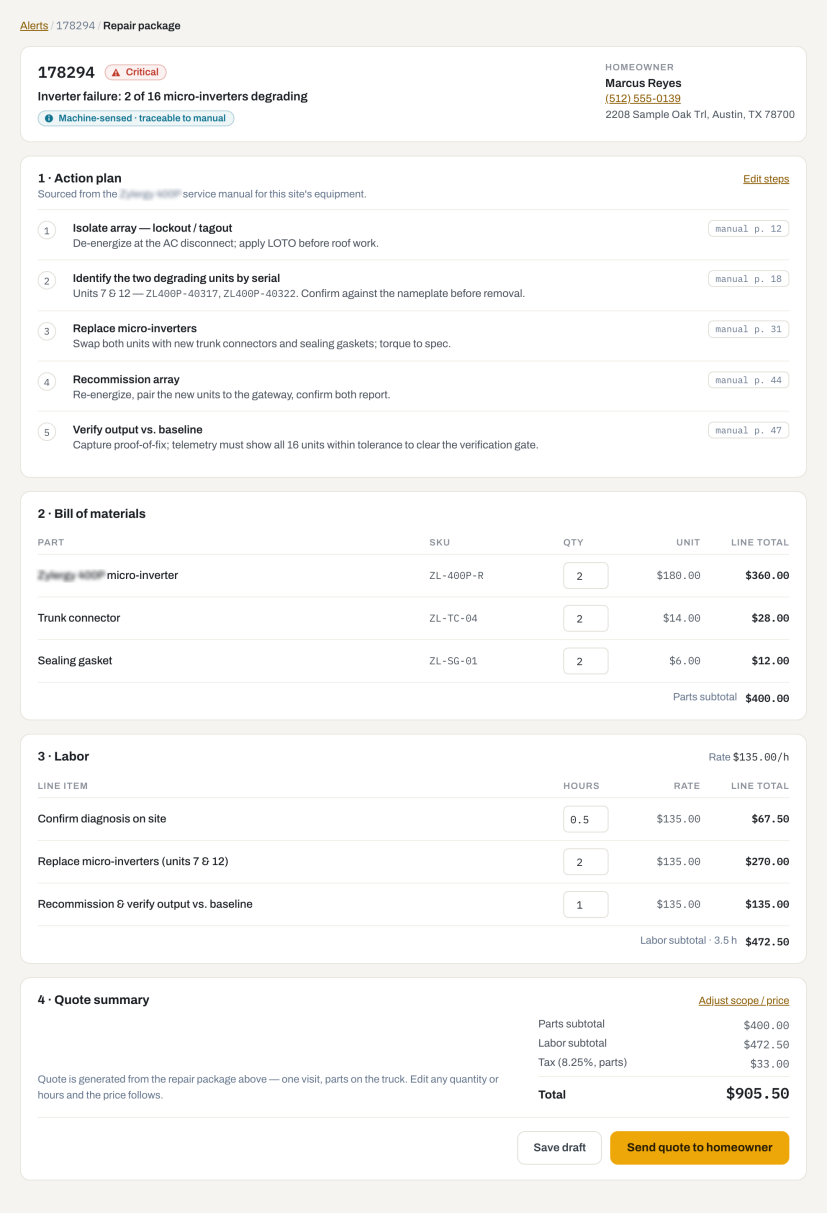


Figure 4-4 The repair package and quote for an alert. Sample data.

1. With the alert selected, click **Generate Quote**. The repair package opens.
2. Under **1 · Action plan**, read the steps and the manual page each step refers to.
3. If a step needs to change, click **Edit steps**, and then change the step.
4. Under **2 · Bill of materials** and **3 · Labor**, change any quantity or hours that differ for this job. The line totals and the quote summary update.
5. Under **4 · Quote summary**, check the total.
6. If you need to change the scope or the price, click **Adjust scope / price**.
7. Click **Save draft**.

RESULT

The repair package and its quote are saved as a draft on the alert.

4.5 Send the quote to the homeowner

When the homeowner has agreed to the price, send the quote for signature.

SALES · WEB CONSOLE

BEFORE YOU BEGIN

- The repair package is complete, and the homeowner has agreed to the price (“Generate the repair package and edit the quote” on page 17).

1. Open the repair package for the alert.
2. Check the total under **4 · Quote summary** once more.
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 and signs it electronically. The alert’s status then changes to **Quoted**. The signed quote is kept on the site’s record.

> NOTE
> Until the homeowner signs, the status stays **Open**.

4.6 Schedule the visit with the parts ready

Book the visit on the **Schedule & billing** page (Figure 4-5). One visit covers the repair and its verification.

SERVICE COORDINATOR OR SALES · WEB CONSOLE

BEFORE YOU BEGIN

- The alert’s status is **Quoted**.

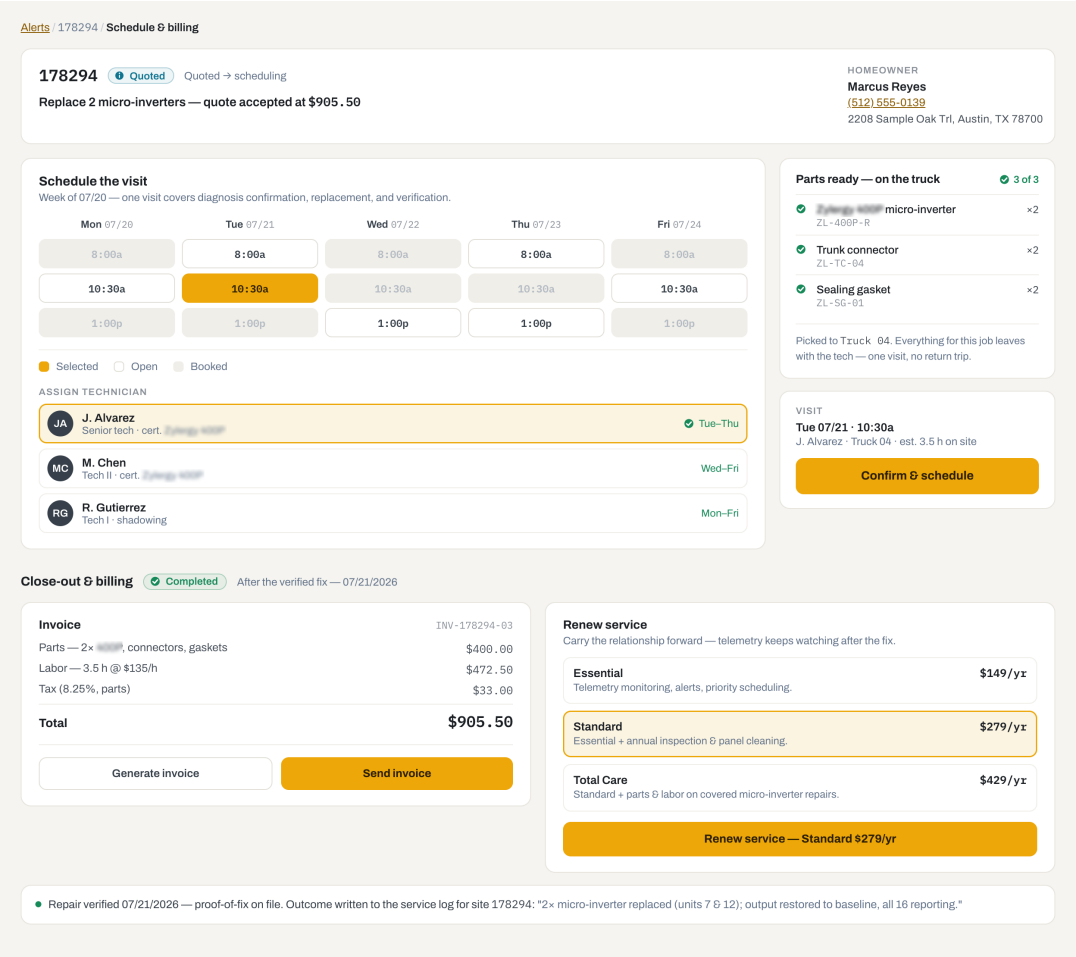


Figure 4-5 The Schedule & billing page: the visit at the top, the close-out and service-plan offer below. Sample data.

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. The list shows the days each technician is available.
4. Under **Parts ready — on the truck**, check that every part in the bill of materials 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 from the signed quote is assigned to the technician. The visit appears in the technician's app.

To route the job to a subcontractor or send it to BuildOps, see the *Zylergy Solar Operator Guide* (ZY-SOL-OPG-01), chapter "Planning the job."

4.7 Start the job on site

On site, the technician opens the job in the app.

TECHNICIAN · IPAD OR IPHONE · WORKS OFFLINE

> **⚠ 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.

1. On **Home**, tap the visit. The job opens with the site, the homeowner and the address at the top.
2. Read the list of steps and the equipment involved.
3. Start the first step of the guided repair.

RESULT

The guided repair opens at step 1.

4.8 Follow the guided repair

The guided repair shows one step at a time (Figure 4-6). The manual page for each step is one tap away. The steps come from the action plan in the repair package.

TECHNICIAN · 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 manual page for the step opens.
3. Read the page, including its cautions.
4. Return to the step.

> **⚠ 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.

5. Compare the serial numbers shown on the step with the nameplates of the equipment.
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.

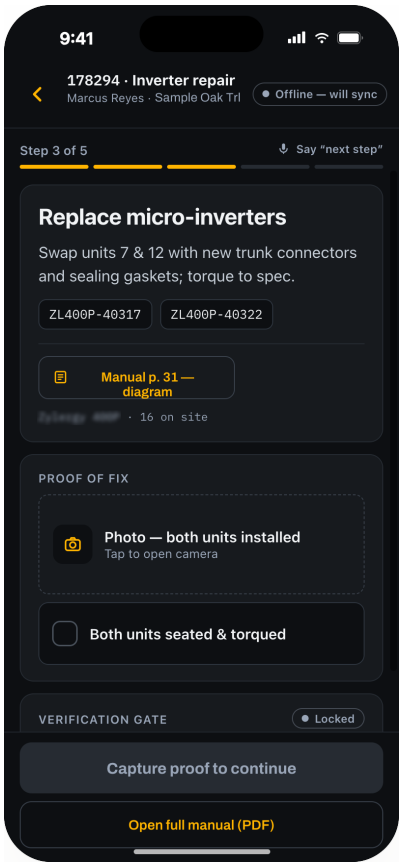


Figure 4-6 A step of the guided repair, with proof of fix and the locked verification gate. Sample data.

RESULT

You reach the step that asks for proof of fix (“Capture proof of fix and pass the verification gate” on page 22).

To see the whole manual, tap **Open full manual (PDF)**.

4.9 Capture proof of fix and pass the verification gate

A job cannot be completed or invoiced until its verification gate passes. The gate shows **Locked** until you have captured the proof the job asks for (Figure 4-6).

TECHNICIAN · 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. Under the photo, tap each checklist item when you have done it.

4. Under **Verification gate**, check that the gate has unlocked. While proof is missing, the button reads **Capture proof to continue** and is unavailable.
5. Confirm the repair.

RESULT

The job's status changes to **Completed**. The outcome is written to the site's service log. If you are offline, the app sends the proof and the outcome when your device is back online.

If the equipment reports telemetry, the gate also checks that the repaired equipment reports within tolerance.

4.10 Invoice the job and offer a service plan

When the repair is verified, the lower half of the **Schedule & billing** page shows **Close-out & billing** with the status **Completed** (Figure 4-5).

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**.
5. Under **Renew service**, click the plan tier the homeowner wants.
6. Click the **Renew service** button, which names the tier you selected.

RESULT

Zylergy Solar generates and sends the invoice and tracks its payment status. The homeowner's service contract is created or renewed. The footer confirms that the repair was verified and that its outcome is on the service log.

Zylergy Solar does not collect payments. The homeowner pays your company directly. The plan tiers come from your company's plan catalog. The tiers in the figure are sample tiers.

This completes your first job. Zylergy Solar continues to read the site's telemetry after the repair.

5 CHAPTER 5

Where to go next

IN THIS CHAPTER

- Common next tasks 24
- Troubleshooting 25
- Get help 25

5.1 Common next tasks

Table 5-1 Where each task is covered

TO DO THIS	SEE
Understand how alerts are detected and use the Overview	*Zylergy Solar Operator Guide* (ZY-SOL-OPG-01), chapter “Telemetry and the alert queue”
Change a repair package and handle the homeowner’s signature	*Zylergy Solar Operator Guide* (ZY-SOL-OPG-01), chapter “Building and sending a quote”
Route a job to a subcontractor or send it to BuildOps	*Zylergy Solar Operator Guide* (ZY-SOL-OPG-01), chapter “Planning the job”
Use hands-free guidance on site	*Zylergy Solar Operator Guide* (ZY-SOL-OPG-01), chapter “Guided repair on site”
Add equipment from its nameplate or a QR tag	*Zylergy Solar Operator Guide* (ZY-SOL-OPG-01), chapter “Adding equipment”
Sell interval, warranty and contract jobs	*Zylergy Solar Operator Guide* (ZY-SOL-OPG-01), chapter “Maintenance and contract jobs”
See which parts to keep in stock	*Zylergy Solar Operator Guide* (ZY-SOL-OPG-01), chapter “Stock and parts”
Explain the homeowner portal to a homeowner	*Zylergy Solar Operator Guide* (ZY-SOL-OPG-01), chapter “The homeowner portal”

Invite people, connect sites and set up the pricebook and plans	*Zylergy Solar Admin Guide* (ZY-SOL-ADG-01)

5.2 Troubleshooting

Table 5-2 Troubleshooting

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.
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.
No camera view on **Scan**	Camera access is not allowed.	Type the equipment details instead, or allow camera access for Zylergy Solar in the Settings app on your device.
The serial number on a step does not match the nameplate	The equipment at the site differs from the site's record.	Do not continue. Call your office so that the record and the job can be corrected.
A site you expect is not in the alert queue	The site is not connected, its authorization was revoked, or you do not have access to it.	Ask your administrator. See the *Zylergy Solar Admin Guide* (ZY-SOL-ADG-01), chapter "Connecting sites: authorization and telemetry."
The verification gate stays **Locked**	Proof of fix is missing, or the repaired equipment does not yet report within tolerance.	Capture every photo and checklist item the gate asks for. If the gate still does not unlock, call your office.
A job's manual pages are not available offline	The job was not packed before you lost coverage.	Pack again over Wi-Fi ("Prepare your device for offline work" on page 11).

5.3 Get help

- In the app, tap **Menu** > **Help**.
- For your account, your roles, or the sites and equipment you can see, ask your administrator.
- For a problem with the product, contact Zylergy support in the app (**Menu** > **Help**) or at support@zylergy.com, Monday through Friday, 8 a.m. to 6 p.m. US Central time.

Glossary

access grant

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

action plan

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

administrator

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

alert

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

alert queue

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

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.

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.

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.

quote

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

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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