

EDITABLE COMPANY / PROJECT FIELDS

Company name (sample: ADWORKS)	Installer / surveyor
Customer name	Survey date
Installation address	Phone / email
Utility / account	Target budget

CHECKLIST

Lower bill	Backup	Off-grid
Net-metering	Future expansion	EV charging

NOTES / OBSERVATIONS

EDITABLE COMPANY / PROJECT FIELDS

Typical monthly bill	Actual monthly kWh
Electricity rate / kWh	Highest bill / kWh
Peak load estimate (W)	Daily energy estimate (Wh)
Largest surge load	Excluded backup loads

CHECKLIST

Critical loads only	Whole-home backup	Load management required
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NOTES / OBSERVATIONS

EDITABLE COMPANY / PROJECT FIELDS

Roof type	Roof age / condition
Usable array area	Roof pitch / access
Orientation / azimuth	Shading sources
Wind / corrosion	Structural review

CHECKLIST

Metal	Tile	Concrete
Ground mount	Carport	Roof repair

NOTES / OBSERVATIONS

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Service voltage / phase	Main breaker rating
Panel condition / spaces	Meter / service entrance
Inverter location	Battery location
PV / AC cable route	Wi-Fi / monitoring

CHECKLIST

Grounding observed	ATS present	Backup panel feasible
Service upgrade needed		

NOTES / OBSERVATIONS

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Hazards / corrective actions	Professional referrals
Photo folder / link	Missing documents

CHECKLIST

Roof overview	Main panel	Meter
Grounding	Cable routes	Equipment locations
Electric bills	Customer authorization	

NOTES / OBSERVATIONS

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PV size (kWp)	Inverter direction (kW)
Battery direction (kWh)	Backup load (W)
Panel wattage / quantity	Peak sun hours
Efficiency %	Future allowance %

CHECKLIST

Off-grid	Hybrid	Grid-tied
Zero export	12 V	24 V
48 V	High-voltage battery	

NOTES / OBSERVATIONS

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Next action	Responsible person
Follow-up date	Quotation due
Customer name / signature	Customer date
Installer name / signature	Installer date

CHECKLIST

Site revisit	Engineering review	Permit follow-up
Quotation ready		

NOTES / OBSERVATIONS