

Your role & daily routine

Your job

Turn Seller and Assisted submissions into accurate, professional SCP reports. Review the information, fill the SCP review form, check the PDF, then approve delivery. Your manager account is jiggyr225@gmail.com.

1. Open your workspace

Go to solarcertifiedpro.com/inspector and sign in. Open Report Processing Que. Use the Report building SOP link whenever you need this guide.

2. Pick the next report

Work oldest first. NEW means received; PENDING means report work is underway. Check the property address and report type before opening anything. Completed reports belong in the Completed list.

3. Check the submission

Confirm the client name, address, email, inspector contact for Assisted Reports, and available photos. Review documents when needed for research. Flag missing or conflicting information to Mike; do not invent findings.

4. Work carefully

Use the SCP review fields as the final source for the PDF. Verify anything carried over. Select only applicable components and statuses. Save Assisted work with Save Draft before stepping away.

5. Finish with a PDF review

View every PDF page before approval. Check the property cover, names, equipment, status, notes, photos, links, spelling, spacing, and missing or irrelevant sections. Go Back to Editing if anything is wrong.

When to ask Mike

Missing required photos; uncertain equipment or installer; conflicting ownership or production data; safety concerns; payment blocked; delivery error; or a completed report that needs correction. Include the address, report type, and exact question.

Billing belongs with Isabella

Never mark a payment received without confirmation. Assisted completion currently records a \$125 Billing pending charge; it does not confirm a successful automatic charge. Tell Isabella about completed reports needing billing follow-up.

Seller Report - step by step

1. Open the Seller submission

Select Seller Report in Report Processing Que and open the seller review form. Load the submission if prompted. The report must show paid before final generation or delivery. If payment is blocked, contact Isabella; do not bypass it.

2. Verify the report details

Check the property address, client contact, property cover photo, system size, installation information, ownership, equipment, installer status, and warranty links. Correct the SCP review fields before generating the PDF.

3. Apply Seller rules

Call the output Solar Report. This is an informational report, not an on-site inspection. Do not add rooftop panel photos, panels, mounting hardware, visible attachments, or critter guard as Seller components. Include a battery only when indicated with a usable battery photo.

4. Apply ownership & equipment logic

If Owned is selected, lender information must not appear. Microinverter defaults to Enphase; String Inverter/Optimizers defaults to SolarEdge. These are defaults only: change them when the supplied evidence identifies another manufacturer.

5. Add useful notes & warranties

Use Important Notes for meaningful topics and explanations. Leave empty notes out. Confirm installer status and website plus applicable panel/inverter warranty links. Seller warranties may include a short description for display use.

6. Respect the package selected

The regular Solar Report should not display uploaded documents. Documents are used for research and, when selected, the Open House presentation option. Do not add an Open House packet unless that option was requested.

7. Generate, review, approve

Generate the PDF preview. Check every page, especially the property cover, ownership, applicable components, notes, warranty links, and photos. Edit and generate a new preview when needed. Approve only the final version for customer delivery.

8. Verify SENT

Confirm the page says SENT and the sent PDF opens. Check the Completed queue after refreshing. If sending fails or confirmation is unclear, record the error and tell Mike. Check delivery before approving again to avoid a duplicate send.

Assisted Report - step by step

1. Open the Assisted submission

Select the Assistive Report entry in Report Processing Que. Confirm the property, client, and submitting inspector. Review the intake information and all uploaded photos before writing findings.

2. Confirm the inspection facts

Who was present and panel count come from the inspector. Do not make them up. Check permit or system information when available. Panel count with panel wattage determines system size; panel count with system size determines wattage. Resolve inconsistent values with Mike or the inspector.

3. Review equipment & conditions

Identify only equipment supported by the submission. Confirm inverter type and manufacturer; verify the default manufacturer. For each applicable component, select its condition. Attention Recommended or Deficient requires a clear observation and practical recommendation. Do not describe inaccessible equipment as inspected.

4. Check communication & production

Monitoring Access uses Yes, No, or Unable to Verify. If Yes, answer applicable status questions; if No or Unable to Verify, give the reason. Microinverter reporting and optimizer reporting must match the system type. Report verified lifetime production and production status; do not estimate lifetime production from a clamp reading.

5. Check photos & warranties

Use the property photo on the cover and relevant inspection photos in the report. Unable to Inspect can explain an inaccessible solar breaker. Confirm installer status and its warranty link, plus applicable equipment warranty links. Send missing-photo or identification questions to Mike.

6. Save Draft, then View PDF for approval

Save Draft while working. When ready, select View PDF for approval. Review every page for accurate conditions, observations, recommendations, applicable fields, photos, readable dates, spacing, and working links. Use Back to Editing at the bottom if anything needs changing.

7. Approve & Complete

Approve & Complete marks the report complete, places it in the inspector workspace, and triggers the inspector completion notification. Verify it moves to Completed. This step creates Billing pending for the \$125 charge; Isabella must confirm billing.

8. Close the loop

Confirm completion and the approved PDF are available. Tell Isabella which reports need billing attention. At day end, leave unfinished reports saved as PENDING and send Mike the addresses and questions holding up work. Archive old reports only when Mike directs it; age alone does not mean resolved.