



SOLAR INSTALLER'S toolkit

10 Steps Every Installer Should Master!
With Resources, Templates & Tools

Prepared By



Installer's Journey

- 01 Lead Generation
- 02 Lead Qualification
- 03 Pre-Sales Design & proposal
- 04 Financing Guide
- 05 Contract Signing
- 06 Site Assessment
- 07 System Design & Engineering
- 08 Permitting
- 09 Procurement, Installation & Inspection
- 10 Monitoring & Maintenance

1. Lead Generation



Proven Solar Lead Strategies [\[View\]](#)



Weekly Content Idea Calendar [\[View\]](#)



Day-wise Message Templates [\[View\]](#)



Day-wise Email Templates [\[View\]](#)

2. Lead Qualification






Lead Qualification Form [\[View\]](#)

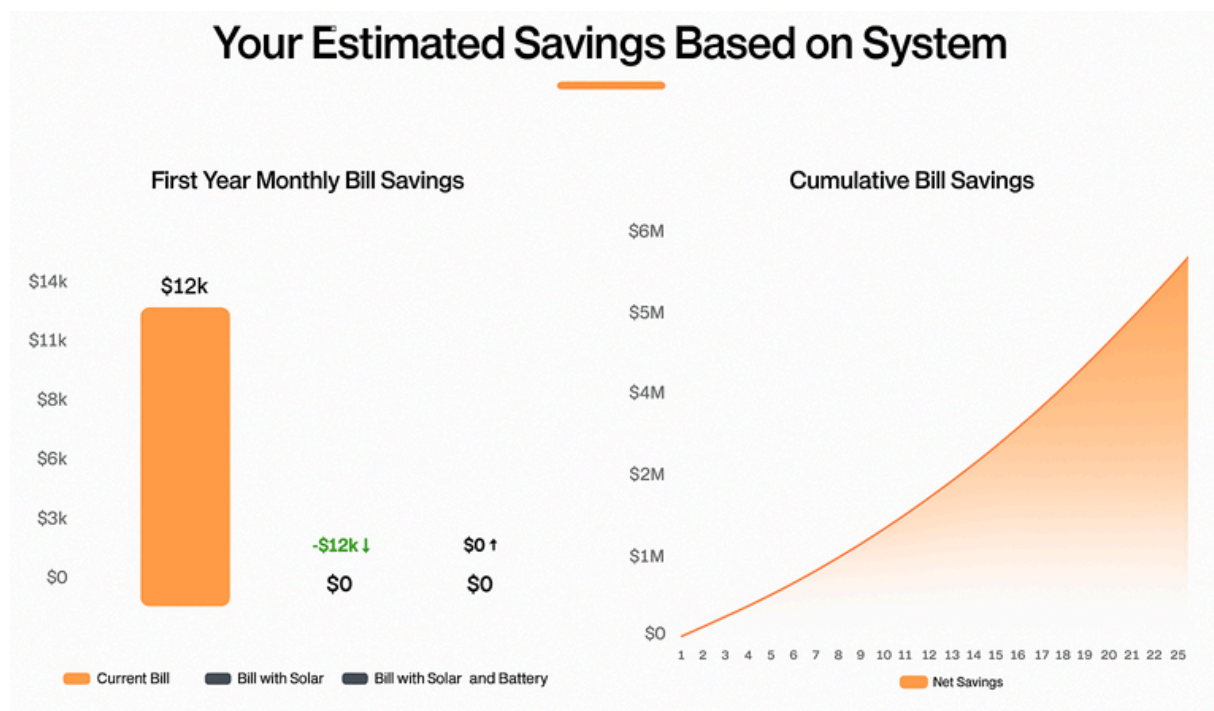


Lead Priority Scoring Method [\[View\]](#)

CRM DASHBOARD

NEW LEAD	PROPOSAL	QUALIFIED
 David US	 Emily US	 John US
<input checked="" type="checkbox"/> Qualified _____ _____	<input checked="" type="checkbox"/> Qualified _____ _____	<input checked="" type="checkbox"/> Qualified _____ _____

3. Pre-Sales Design & Proposal



Winning Proposal
Guide [[View](#)]



Incentives
[[Open Tool](#)]

4. Financing Guide



Find best Financing
Options [[View](#)]



All about Solar
Financing [[View](#)]



5. Contract Signing



Signing Checklist
[\[View\]](#)

6. Site Assessment



Site Survey Checklist
[\[View\]](#)



Property line tool
[\[Open Tool\]](#)

7. System Design & Engineering



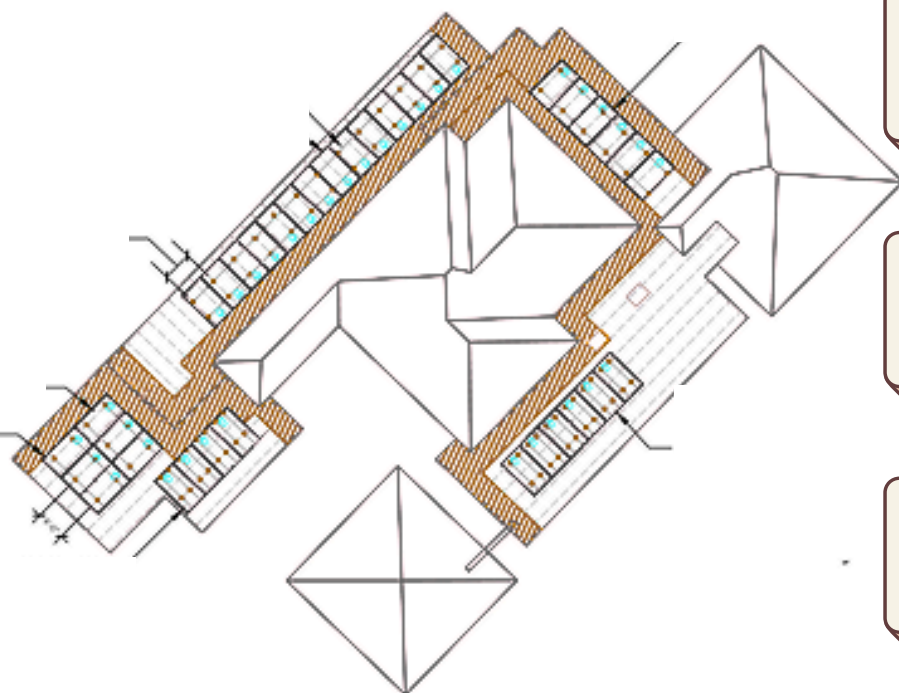
Optimize PV Design
[\[View\]](#)



Select the right Panel
& Inverter [\[View\]](#)



8. Permitting & AHJ Compliance



Planset Checklist
[\[View\]](#)



AHJ Code Sheet
[\[View\]](#)



Installation Safety Tips
[\[View\]](#)

9. Procurement, Installation & Inspection



Procurement Guide
[\[View\]](#)



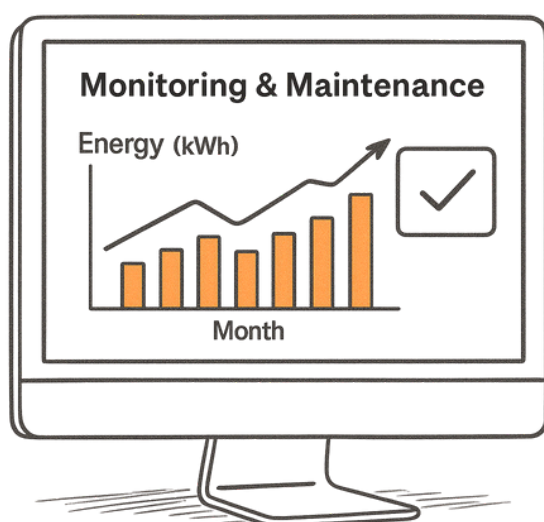
Panel Installation Guide
[\[View\]](#)



Inspection Guide
[\[View\]](#)



10. Monitoring & Maintenance



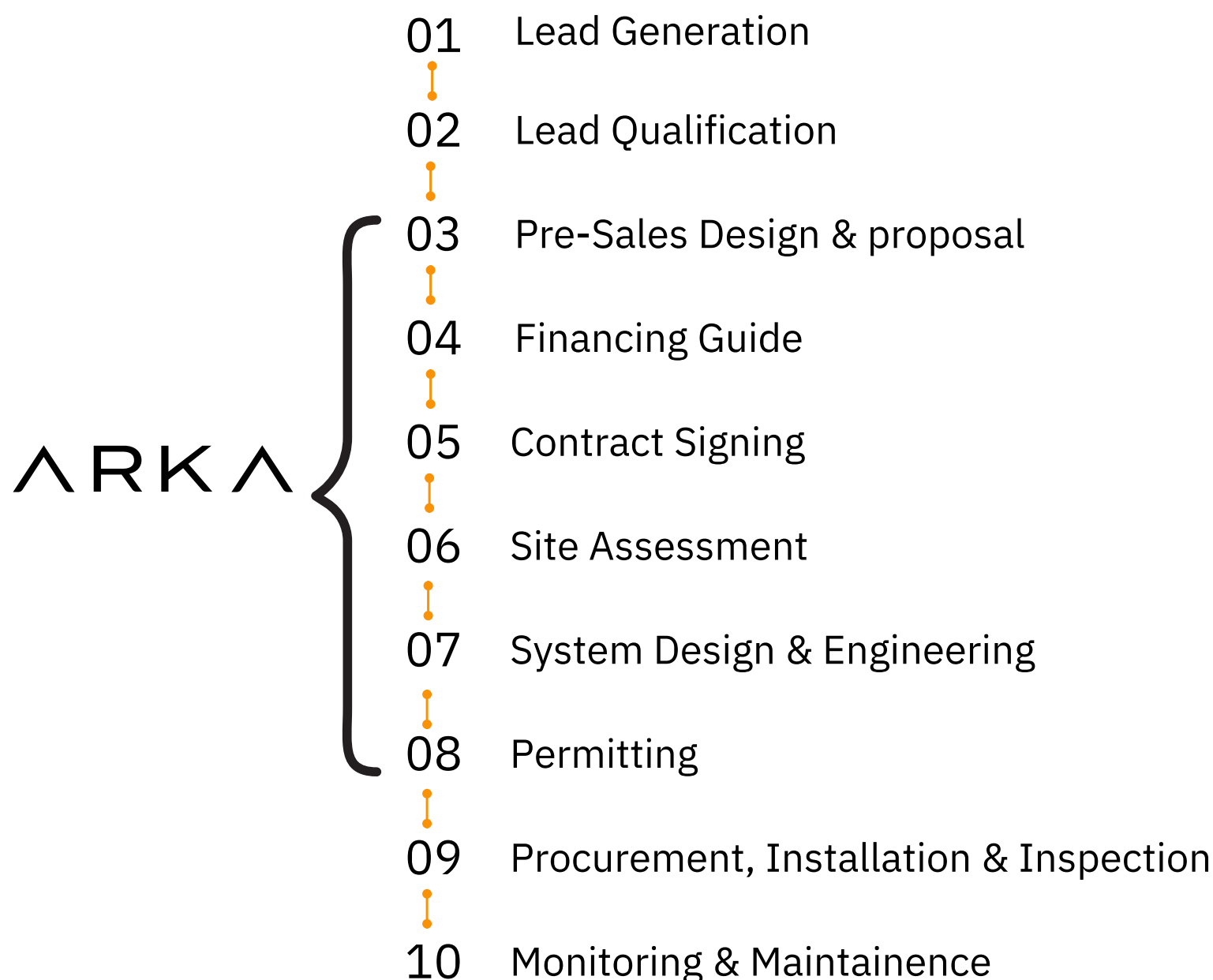
Solar Panel
Maintenance [\[View\]](#)



Referral & Upsell Kit
[\[View\]](#)

Arka360 Advance Solar Software & Services Streamline Key Solar Project Stages, Saving You Time and Effort!

A typical solar project has 10 stages. Arka360 simplifies it from pre-sales to permitting — as shown below.



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