

## Requirements Document

This document will provide end to end process documentation for the working of this platform, how the modules are tied to each other and what field information has to be captured.

### User Types

1. Admin
2. Sales & Compliance (S&C)
3. Customer
4. **Installer**


### Process flow



1. Customer Fills Contact form
  - a. The Contact form can be either embedded on the website, mobile app, or it should also be able to get information from other sources in form of API.
  - b. Fields
    - i. Full Name
    - ii. Address Line - 1
    - iii. Address Line - 2
    - iv. Pin Code ( only from the values mentioned in Appendix-A Section-1)
      1. Only 5 digit number
    - v. City ( only from the values mentioned in Appendix-A Section-2)
    - vi. State ( only from the values mentioned in Appendix-A Section-3)
    - vii. Monthly Electricity Usage in kWh
      1. Only floating point
    - viii. Phone
      1. Valid India Phone number
    - ix. Email
      1. Valid Email
    - x. Visit Date and Time
  - c. On Submit
    - i. Once this form is submitted, it will show in S&C Visit Confirmation
    - ii. A user will automatically be created and an email will be sent to customer for setting up account - Template "Account Setup and Confirmation" in Appendix-A

- iii. For now, if the City is anything other than **Jodhpur**, then send an email - Template “Out of Scope” in Appendix-A

Customer Form

Name	
Address Line - 1	
Address Line - 2	
Pin Code	
City (Auto)	
State (Auto)	
Electricity Usage in kWh	<input type="radio"/> Yearly <input type="radio"/> Monthly
Phone	
Email	
Visit Date and Time	

Submit

**2. Site Inspection Confirmation**

- S&C will be able to view the list for which Visit needs to be confirmed.
- On detail view of the Visit, S&C will have an option to change Scheduled Date and Time
- If the Scheduled Date and Time is changed, then an automatic email and text notification will be sent to the customer. Template “Inspection Schedule Change” in Appendix-A.
- S&C Visit confirmation will be divided into two statuses:
  - To be Confirmed - When the Visit is not confirmed. Sorted by Received Date.

- ii. Confirmed - When the Visit is Confirmed. Sorted by Date and time scheduled.
- e. Views - The S7C Visit confirmation can be shown in List View and Calendar View. Calendar View should be able to change based on Month View, Week View and Day View
- f. The Confirmed status tab will have a button to each record which will take to Site Inspection detail.

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S&C Visit Confirmation

To Be Confirmed

Confirmed

Received Date	Scheduled Datetime	Name
12/03/20	12/09/20 1:43 PM	Piyush Jain
12/03/20	12/09/20 1:43 PM	Piyush Jain
12/03/20	12/09/20 1:43 PM	Piyush Jain

List View and Calendar View both

Visit Details - Open

12/03/20

12/09/20 1:43 PM

Piyush Jain

9830121888

jain@piyush.com

888 kWh per month

Address Line - 1

Address Line - 2

City, State

Pin Code

Change Scheduled Date and Time

Confirm

If Scheduled Date and Time changes, automatic email and text to be sent to customer

3. **Site Inspection Detail** - A green checkmark will automatically show when all the fields in a section is completed. This consists of six sections as accordions:
  - a. Basic
    - i. Fields

1. Average Monthly Usage in kWh - floating point value
2. Potential Install area (shadow free in SQFT) - floating point value
3. Average Sun Hours - floating point value
4. Bill Offset - Slider from 0 to 200%
5. Capture Location - When the button is pressed, the application should capture Lat/Long of current location
- ii. Estimated System Size - Calculated based on formula in Appendix-A Section-4
- b. Design
  - i. Fields
    1. Panel Array Installation - This will open a screen where the user can Draw free hand. The image should be saved and shown as a link
    2. Small Leg (in IN)
    3. Large Leg (in IN)
    4. Number of Rows
    5. Panel to Inverter Length (Approx)
- c. Payment Plan - This has two options:
  - i. Cash
    1. Fields
      - a. Deposit
      - b. Remaining = TPC - Deposit
  - ii. EMI
    1. Fields
      - a. Down Payment - Number
      - b. Number of Months - Slider from 12 to 72 months, in increments of 12.
      - c. Interest (est.) - floating point
      - d. EMI - Calculated based on formula in Appendix-A Section-6
      - e. Existing Home Loan - Yes/No switch
      - f. Banking Partner - From Appendix-A Section-7
      - g. Bank Branch

TPC -> Total Project Cost (includes 2 years AMC) is calculated based on formula in Appendix-A Section-5

- d. Paperwork
  - i. Ability to Upload and See 3 documents
  - ii. Once uploaded the link to document should show up and re-upload should show up
  - iii. If Re-uploaded, the file will be replaced

e. Site Pictures

- i. Three sections with ability to add multiple pictures and videos:
  - 1. Panel Area
  - 2. Inverter Area
  - 3. Wiring Path Video

f. Deal Status - This has four options:

- i. Negotiation / Review
- ii. Closed Won
- iii. Closed Lost
- iv. Closed Lost to Competition

Estimated System Size

5.94 kW

Site Inspection

Site Inspection Detail

Basic ✓

Average Monthly Usage in kWh

Potential Install Area

Average Sun Hours

Bill Offset 

0100

Capture Location 

Capture

Design

Panel Array (Installation) 

Draw

Mounting

Small Leg (in IN)

Large Leg (in IN)

Number of Rows

Wiring Length (i)

Panel to Inverter Length (Approx)

Payment Plan

Total Project Cost (includes 2 years AMC)

Rs. 3,88,888

Cash

EMI

Deposit

Remaining 

Rs. 3,00,000

Paperwork

Document - 1 

Upload

Document - 2 

Upload

Document - 3 

Upload

Site Pictures

Panel Area 

Take

 +

Inverter Area 

Take

 +

Wiring Path Video 

Take

 +

Design

Ability to Design from Hand here

Cash

EMI

Down Payment

No. of Months 

1296

Interest (est.)

EMI 

Rs. 3,888

Existing Home Loan

Banking Partner

Bank Branch

All fields are Auto-Save. Once a Site Inspection form is submitted a new Potential record is created with Potential Status as “Negotiation / Review” and its automatically removed from the Confirmed queue.

#### 4. Potentials

##### Potentials List

Shows a list of all Potentials with Potential ID, Name, Effective System Size, Status. With a link to view Potential Detail.

##### Potentials Detail

1. Shows Potential detail with Potential ID, Survey ID (link to Inspection), Effective System Size on top.
2. Fields
  - a. Potential Status - Options
    - i. Negotiation/Review
    - ii. Closed Won
    - iii. Closed Lost
    - iv. Closed Lost to Competition
  - b. Reason - Only shown when Potential Status is Closed Lost or Closed Lost to Competition. Values:
    - i. Found Better Pricing
    - ii. Better Components Found
    - iii. Finance Issue
    - iv. Unable to Afford
    - v. No shadow free Space on roof
    - vi. Roof not easily accessible
    - vii. Maintenance is a burden
    - viii. Don't think Solar is a Viable Option
  - c. Comments - Only shown when Potential Status is Closed Lost or Closed Lost to Competition.
    - i. Multiline
  - d. Agreement - This will show up only when the Deal Status is "Closed Won"
    - i. Agreement text will be shown from a URL
    - ii. First 5 lines of agreement will be shown on this page
    - iii. Link to Read a full Agreement which should open in a new Tab
    - iv. Ability to Sign with free hand in the designated box
3. On Submit
  - a. At the time of Submit, when Potential Status is "Closed Won", a new Project will automatically be created.

### Potential List

P ID	Name	Size	Status
1111	Piyush Jain	11.1 kW	Negotiation/Review
1111	Piyush Jain	1.11 kW	Closed Won
1111	Piyush Jain	8.88 kW	Closed Won

### Potential Detail

**Potential ID - 1111**  
[Survey - 111](#)

**Effective System Size**  
**4 kW**

**Potential Status**

**Reason**

**Agreement**

Lorem Ipsum is simply dummy text of the printing and typesetting industry. Lorem Ipsum has been the industry's standard dummy text ever since the 1500s, when an unknown printer took a galley of type and scrambled it to make a type specimen book.

[Read Full Agreement](#)

Sign Here

Submit

Negotiation/Review  
 Closed Won  
 Closed Lost  
 Closed Lost to Competition

- Projects** - Shows project ID, Survey ID(link to Inspection detail Page) and System Size on top. All fields are Auto-Save.

### Projects List

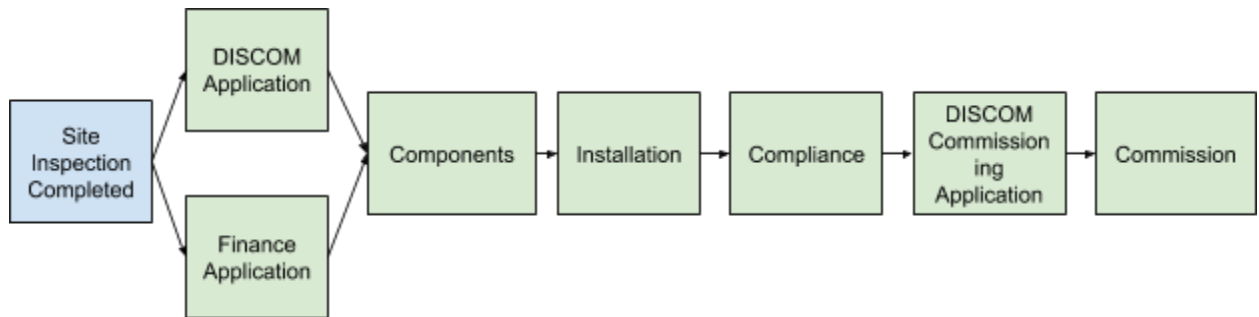
List page with columns for SI Date, Project ID, Name (Link to Project Details Page)

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Projects List		
SI Date	Project ID	Name
05/21/20	1111	<a href="#">Piyush Jain</a>
05/21/20	1111	<a href="#">Piyush Jain</a>
05/21/20	1111	<a href="#">Piyush Jain</a>

### Project Status Flow





It has 7 sections, it section has a specific status which is marked based on the status as shown in the screenshot below. Each section is only allowed to be edited when the previous section is finished/Approved. The exception is with DISOM Application and Finance Application which can be allowed to be edited in parallel to each other, but the Components section is allowed to be edited only when both DISOM Application and Finance Application is approved.

1. DISCOM Application
  - a. Download Forms link - which will direct to a specific link on website
  - b. Fields
    - i. Application Submitted - Yes/No switch
      1. Once Application Submitted is marked as Yes, Status field is shown
    - ii. Status - With Values:
      1. Approved
      2. Denied
2. Finance Application
  - a. Download Finance Package - which will direct to a specific link on website
  - b. Fields
    - i. Application Submitted - Yes/No switch
      1. Once Application Submitted is marked as Yes, Status field is shown
    - ii. Status - With Values:
      1. Approved
      2. Denied
3. Components
  - a. There are 6 main components with two stages Ordered and Received.
  - b. Each one is individual tracked and will be used in later phases
  - c. The section Status
    - i. Ordered - When all components are ordered.
    - ii. Received - When all components are Received.
4. Installation

- a. **Assign Installer - This should be a searchable dropdown from Installers sorted based on distance from Pin code of the Inspection address.**
  - b. Date Scheduled - Date field
  - c. Installation Completed - Yes/No switch
- 5. Compliance
  - a. Date Scheduled - Date field
  - b. Compliance Completed - Yes/No switch
- 6. DISCOM Commissioning Application
  - a. Application Submitted - Yes/No switch
  - b. Date Scheduled - Date field
- 7. Commision
  - a. Commissioned - Yes/No switch

Project ID - 888

Survey - 111

Effective System Size

4 kW

DISCOM Application

Download Forms

Application Submitted

Status

Approved

Finance Application

Download Finance Package

Application Submitted

Status

Approved

Components

	Ordered	Received
Panels	<div></div>	<div></div>
Inverter	<div></div>	<div></div>
Frame	<div></div>	<div></div>
Wire	<div></div>	<div></div>
Accessories	<div></div>	<div></div>
Monitoring System	<div></div>	<div></div>

Installation

Assign Installer

Date Scheduled

Installation Completed

Compliance

Date Scheduled

Compliance Completed

DISCOM Commissioning Application

Application Submitted

Date Scheduled

Commission

Commissioned

Submitted

Approved

Denied

Submitted

Approved

Denied

Ordered

Received

Scheduled

Completed

Scheduled

Completed

Submitted

Scheduled

Commissioned

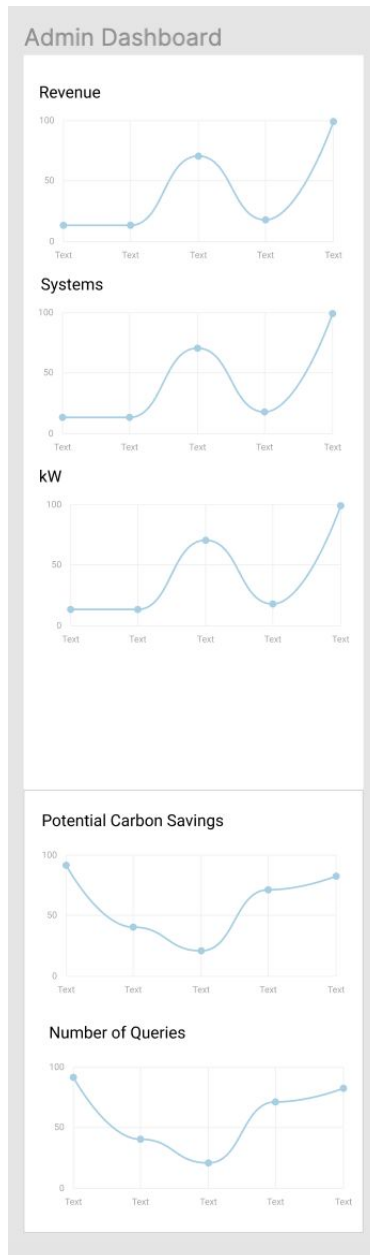
**7. Installers - Ability to add/edit/delete installers by Admin:**

**1. Fields:**

- a. Company Name**
- b. Contact Name**
- c. Phone Number**
- d. Email**
- e. Address Line-1**
- f. Address Line -2**
- g. City**
- h. State**
- i. PinCode**
- j. Number of Projects Installed**
- k. Total Installed Capacity in kW**
- l. Maximum Instal Experience in kW**
- m. Number of employees**
- n. Maximum distance served (in km)**

**8. Admin Dashboard - The Admin Dashboard shows following Graphs which are filtered based on two statuses: Commissioned vs Non-Commissioned**

- 1. Revenue**
- 2. Systems**
- 3. System Size (kW)**
- 4. Potential Carbon Savings**

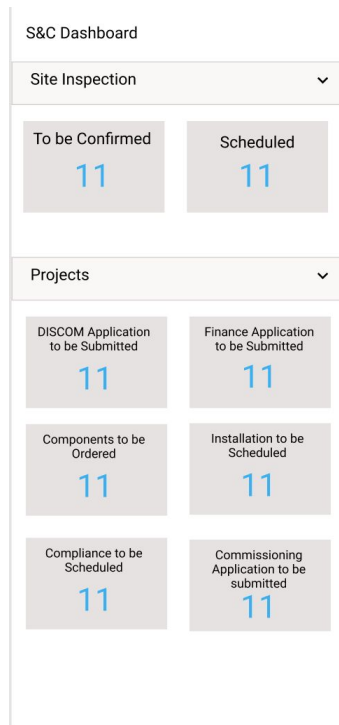


Number of queries is not tied with the above filter and its the number of Customers Submitted Customer form.

## 8. S&C Dashboard

1. Admin should be able to see S&C Dashboard as well
2. Consists of 8 sections with total records for that interaction with link to see the list of all such records either in Site Inspection or Projects
  - a. Site Inspection
    - i. To be Confirmed - all the records for which Site Inspection needs to be Confirmed.

- ii. Scheduled - all the records for which Site Inspection is Scheduled
- b. Projects
  - i. DISCOM Application to be Submitted - all the records for which Site Inspection is completed
  - ii. Finance Application to be Submitted - all the records for which Site Inspection is completed and Payment Plan has EMI option selected.
  - iii. Components to be Ordered - all the projects for which DISCOM application and Finance application is Approved.
  - iv. Installation to be Scheduled - all the projects for which all the components are Received.
  - v. Compliance to be Scheduled - all the projects for which Installation is completed
  - vi. Commissioning Application to be Submitted - all the projects for which Compliance is Submitted



## 9. Customer Dashboard

1. Customer Dashboard will show Project ID, Effective System Size, Payment Plan Type (if EMI, show EMI value as well)
2. Project Tracker
  - a. Based on the status of the Project, it will show a kind of a timeline.
  - b. All Steps which are completed will be in Green
  - c. Ones which are yet to completed will be in Grey

## Customer Dashboard

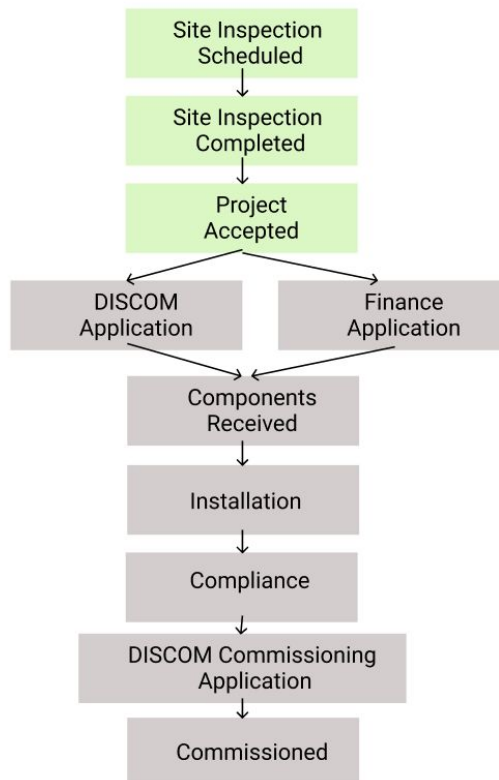
### Customer Dashboard

**Project ID - 888**

Effective  
System Size

**4 kW**

### Project Tracker



### Payment Plan Selected

Cash or

EMI showing EMI Value