Current State Evaluation

# System Design

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## Task 1

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| --- | --- |
| Process Name | Create the Design Object |
| Process Owner | System Design |
| Process Dependencies | Resolutions completes the Resolutions Action Item and Generates (auto) the Create Full Set Design Action Item |
| Process Inputs | * Create Full Set Action Item * Customer Information * Report: [01 ALL FULL SETS THAT ARE DUE TODAY](https://trinity-solar.my.salesforce.com/00O32000004x6Qv?dbw=1)   [01 ALL FULL SETS THAT ARE REQUESTED](https://trinity-solar.my.salesforce.com/00O32000004nOnP) |
| Process Outputs | * Design Object * ACAD Calc * Design Drive customer folder |
| Process Activities | 1. Navigate to Salesforce. 2. Open the Report: [01 ALL FULL SETS THAT ARE DUE TODAY](https://trinity-solar.my.salesforce.com/00O32000004x6Qv?dbw=1)   [01 ALL FULL SETS THAT ARE REQUESTED](https://trinity-solar.my.salesforce.com/00O32000004nOnP)   1. Select a job to work on. 2. Open the Create Full Set Action Item. 3. Update the Action Item Status: Started. 4. Open the Opportunity. 5. Scroll to the Design Object Section. 6. Click the button: Create New Design. 7. Type: Ctrl + Shift + C. (Copies customer name and address) 8. Open the Network Drive: Design. 9. Select the required folder template for the selected job. 10. Copy and paste the template in the Drive, 11. Rename the Copy by typing: Ctrl + Shift + 2. 12. Click the Congo Button on the Design Object. 13. Select the ACAD Calc Excel Template. 14. Save the template into the new customer folder in the Design Drive. |
| Process Roles | Designer |
| Applications and Software/Tools | Salesforce, Network Drive, Conga, Excel, Design Helper GUI |
| Salesforce Objects | Reports, Opportunity, Action Item, Design |

### Process Flow

## Task 2

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| --- | --- |
| Process Name | Create the Full Set |
| Process Owner | System Design |
| Process Dependencies | The Create Full Set Action Item has been started and the Design object created. |
| Process Inputs | * Certified System Builder * Design Object * Genesis Design * ~~ACad cal~~ (Excel does our calculations. Acad receives inputs from Excel and at times places information in Excel.) * Sales Photos |
| Process Outputs | * Full Set Design |
| Process Activities | 1. Open the Customer’s Opportunity Page. 2. Navigate to BOX 🡪 Site Info Designs. 3. Open the Genesis File. 4. Confirm the number of panels matches the # of panels used field on the roof object. 5. Does it match?   Yes:   1. Proceed to step: 12   No:   1. Update the Create Full Set Design Action Item status: On Hold. 2. Create a new Action Item: Resolution Needed. 3. Wait 4. Receive instructions on moving forward. 5. Proceed with step 12. 6. Download the .genesis file ~~to the customer’s Design Drive Folder~~. (We do not save these on the design server.) 7. Open the Excel file from the customer’s Design Drive Folder. 8. Review the Roof Object in Salesforce. 9. Determine the number of inverter strings required. 10. Enter the inverter and strings into the Excel. 11. Update Excel with all required information. 12. Open Google Maps. 13. Search the customer’s address in Satellite view. 14. Confirm it is the correct home. 15. Take a Snip of the home and surrounding area. 16. Save the Snip in the customer’s Design Drive Folder 🡪 Misc. 17. Open the AutoCad template from the customer’s Design Drive Folder. 18. Import the 3 line diagram template and Home image. (auto). 19. Import the Genesis Design File. 20. Open the AHJ Account Page in Salesforce. 21. Review all requirements. 22. Navigate back to the Opportunity. 23. Open the Job Photos Folder from BOX. ***(Relocated blue highlight)*** 24. Review all photos. 25. Determine the meter location. 26. Does the Electrical Service look acceptable?   Yes:   1. Proceed to step: 37   No:   1. Create a new Action Item: Electrical Review. 2. Update the Create Full Set Design Action item status: On Hold. 3. Update Action Item Notes: On Hold for Electrical. 4. Check for Electrical Upgrade information in Action Items. 5. Update the 3-Line page in AutoCad with Electrical Upgrade information and customize interconnection and existing service equipment, if needed. 6. Align image for Full Set Cover Page in Cad. 7. **NJ Design?**   No: Proceed to step:41  Yes:  Does the AHJ require Rough inspections?  Yes:  Select Rail-less racking in CAD.  No:   1. Select Railed racking in CAD. 2. Label the layout:    1. Front of home    2. Back of Home    3. Meter Location    4. Disconnect Location    5. Inverter Location    6. Add additional equipment as needed.    7. If needed:       1. Identify and illustrate setbacks and ground access points       2. Illustrate trench       3. Develop elevation drawings       4. Develop foot and rafter diagram       5. Develop site plan or Google Map       6. Move on to create combined plan sets       7. Locate structural information and populate / customize structural details       8. Add flood elevation information       9. Super impose panels on images       10. Add territory specific Notes       11. Order Ground Mount Unirac Specs       12. Illustrate Existing PV system Equipment       13. Identify and illustrate location of utility transformer 3. Review the layout(s) and scale to fit the page. 4. Click: Publish. 5. Remove pages not needed to Publish. 6. Name by typing: Ctrl +Shift + 3 7. Save. |
| Process Roles | Designer |
| Applications and Software/Tools | Salesforce, Auto Cad, Network Drive, Google Maps, Snipping Tool, Excel, Genesis, VBA, Lisp. When needed: Connect Explorer, Bing, Township websites, FEMA maps |
| Salesforce Objects | Reports, Opportunity, Action Item, Design, Account, Roofs |

### Process Flow

## Task 3

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| --- | --- |
| Process Name | Update Salesforce: Full Set |
| Process Owner | System Design |
| Process Dependencies | The Full Set Design has been created. |
| Process Inputs | * Full Set |
| Process Outputs | * Application Action Items (State, Permit, Interconnection) |
| Process Activities | 1. Open the customer’s Opportunity. 2. Navigate to BOX 🡪 Site Info Designs 🡪 Current System Design folder. 3. Upload the Full set pdf from the customer’s design drive folder. 4. Open the Create Full Set Design Action Item. 5. Update the Action item status: Complete. 6. Click Save. 7. Update the Opportunity Stage to 6: Applications. 8. Update the Opportunity Stage Status: Not Started. 9. Open the ACAD calc excel file. 10. Check the field for estimated install timeframe. 11. Enter the number into the Opportunity field for install timeframe. 12. Navigate to the System Details Section of the Opportunity. 13. Update the Inverter and Panel information to match the Full Set. 14. Select the racking type being used. 15. Click save on the Opportunity. |
| Process Roles | Designer |
| Applications and Software/Tools | Salesforce, BOX, Excel, Network Drive |
| Salesforce Objects | Opportunity, Action Item |

### Process Flow

## Task 4

|  |  |
| --- | --- |
| Process Name | Full Set Design Update |
| Process Owner | System Design |
| Process Dependencies | A Design Update Needed Action Item is created to request a change to the Active Full Set. (Applications, Partner Solutions, Resolutions, Sales Support) |
| Process Inputs | * Report: [03 DESIGN UPDATED REQUESTED](https://trinity-solar.my.salesforce.com/00O32000004kaMe?dbw=1) * Create Design Update Needed Action Item * If Needed: Sales Photos |
| Process Outputs | * Updated Full Set |
| Process Activities | 1. Navigate to Salesforce. 2. Open the report: [03 DESIGN UPDATED REQUESTED](https://trinity-solar.my.salesforce.com/00O32000004kaMe?dbw=1) 3. Prioritize oldest requests and closest installs. 4. Select a job to work on. 5. Open the Create Design Update Needed Action Item. 6. Update the Action Item Status: Started. 7. Open the Opportunity. 8. Navigate to the Design Object Section in Salesforce. 9. Create New design Object 10. Click the Conga button. 11. Select the template: Update Sheet. 12. Save the download into the customer’s Design Drive Folder. 13. Open the customer’s folder from the Design Drive. 14. Open the UPDATE Sheet. 15. Click button 1. (Updates main Excel File) 16. Open the main Excel file. 17. Fill in the Revision section. 18. Update the System Information: Based on Update Requests. 19. Open AutoCad from the customer’s Design Drive Folder. 20. Update the system information as needed. 21. Open the Genesis File from BOX. 22. Review the panel layout. 23. Adjust the panel layout in AutoCad to match Genesis. 24. Complete a Datalink update to pull in the Excel sheet information. 25. Click Publish. 26. Remove pages not needed to Publish. 27. Click Publish. 28. Save AutoCad. 29. Navigate to BOX 🡪 Site Info Designs 🡪 Current System Design folder. 30. Move the previous Full Set into the Old pdf folder. 31. Upload the Updated Full set pdf from the customer’s design drive folder. 32. Open the Design Update Needed Action Item. 33. Update the Action item status: Complete. 34. Click Save. 35. Navigate to the System Details Section of the Opportunity. 36. Update the Inverter and Panel information to match the Full Set. 37. Click save on the Opportunity. 38. Send a Chatter to the requestor of the design change. 39. If within one week of install, chatter parties as per install email list |
| Process Roles | Designer |
| Applications and Software/Tools | Salesforce, AutoCad, Network Drive, Excel, BOX, Conga |
| Salesforce Objects | Opportunity, Action Item, Report, Design, Chatter |

### Process Flow

## Task 5

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| --- | --- |
| Process Name | As Built Designs |
| Process Owner | System Design |
| Process Dependencies | The install has been complete and the Field As-Built has been uploaded by the post installation team. |
| Process Inputs | * Report: [As Builts that are Requested](https://trinity-solar.my.salesforce.com/00O0d000005PAgV?dbw=1) * Create As-Built Drawing Action Item * Field As-Built * If needed: Install Photos |
| Process Outputs | * As-Built Design |
| Process Activities | 1. Navigate to Salesforce. 2. Open the report: [As Builts that are Requested](https://trinity-solar.my.salesforce.com/00O0d000005PAgV?dbw=1) 3. Select a job to work on. 4. Open the Create As-Built Drawing Action Item. 5. Update the Action Item Status: Started. 6. Open the Opportunity. 7. Download the Field As-Built From BOX. 8. Create a new Design Object. 9. Click the Conga button. 10. Select the template: Update Sheet. 11. Save the download into the customer’s Design Drive Folder. 12. Open the customer’s folder from the Design Drive. 13. Open the UPDATE Sheet. 14. Click button 1. (Updates main Excel File) 15. Open the main Excel file. 16. Update the information to match the Field As-Built. 17. Save and close Excel. 18. Open AutoCad from the customer’s Design Drive Folder. 19. Update the location of all equipment as needed. 20. Update the System Information 21. Update the 3-Line page to match the Field As-Built. 22. Update the Permitting Revision Card to indicate what changed from the Permit set. 23. Click Publish. 24. Remove Items not needed. 25. Save As [customer name]- FULL SET (A1). 26. Save the Cad file. 27. Navigate to BOX 🡪 Site Info Designs 🡪 Current System Design folder. 28. Move the previous Full Set into the Old pdf folder. 29. Upload the As-Built pdf from the customer’s design drive folder. 30. Open the Create As-Built Drawing Action Item Action Item. 31. Update the Action item status: Complete. 32. Click Save. 33. Update the System Details Section of the Opportunity. |
| Process Roles | Designer |
| Applications and Software/Tools | Salesforce, AutoCad, Network Drive, Excel, BOX, Conga |
| Salesforce Objects | Opportunity, Action Item, Report, Design |

### Process Flow

## Task 6

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| --- | --- |
| Process Name | As-Built Update |
| Process Owner | System Design |
| Process Dependencies | Changes to the As-built are required for permit updates or electrical changes. The As-Built Update Needed Action item is set by Applications or Electrical. |
| Process Inputs | * Report: [As Builts that are Requested](https://trinity-solar.my.salesforce.com/00O0d000005PAgV?dbw=1) * As-Built Update Needed Action Item |
| Process Outputs | * Updated As-Built Design |
| Process Activities | 1. Navigate to Salesforce. 2. Open the report: [As Builts that are Requested](https://trinity-solar.my.salesforce.com/00O0d000005PAgV?dbw=1) 3. Select a job to work on. 4. Open the As-Built Update Needed Action Item. 5. Update the Action Item Status: Started. 6. Open the Opportunity. 7. Download the Field As-Built From BOX. 8. Create a new Design Object. 9. Click the Conga button. 10. Select the template: Update Sheet. 11. Save the download into the customer’s Design Drive Folder. 12. Open the customer’s folder from the Design Drive. 13. Open the UPDATE Sheet. 14. Click button 1. (Updates original Excel File) 15. Open the main Excel file. 16. Update the information to match the Field As-Built. 17. Save and close Excel. 18. Open AutoCad from the customer’s Design Drive Folder. 19. Update the location of all equipment as needed. 20. Update the System Information 21. Update the 3-Line page to match the Field As-Built. 22. Update the Permitting Revision Card to indicate what changed from the Permit set. 23. Click Publish. 24. Remove Items not needed. 25. Save As [customer name]- FULL SET (A2). 26. Save the Cad file. 27. Navigate to BOX 🡪 Site Info Designs 🡪 Current System Design folder. 28. Move the previous Full Set into the Old pdf folder. 29. Upload the As-Built pdf from the customer’s design drive folder. 30. Open the Create As-Built Drawing Action Item Action Item. 31. Update the Action item status: Complete. 32. Click Save. 33. Update the System Details Section of the Opportunity. |
| Process Roles | Designer |
| Applications and Software/Tools | Salesforce, AutoCad, Network Drive, Excel, BOX |
| Salesforce Objects | Opportunity, Action Item, Report, Design |

### Process Flow