

How To Use **Sunvoy** For Operations & Maintenance



Managing operations and maintenance (O&M) in the solar industry can feel like juggling a dozen tasks at once while responding to angry customers. **Sunvoy simplifies this by putting all your essential data in one place**, allowing you to track everything from system performance to maintenance schedules easily and even get ahead of frustrated customers by being proactively about issues.

No more scattered spreadsheets and half baked internal IT solutions—Sunvoy brings it all together.

Whether you're in operations, sales, or management, Sunvoy's features are designed to help you stay on top of O&M tasks effortlessly.

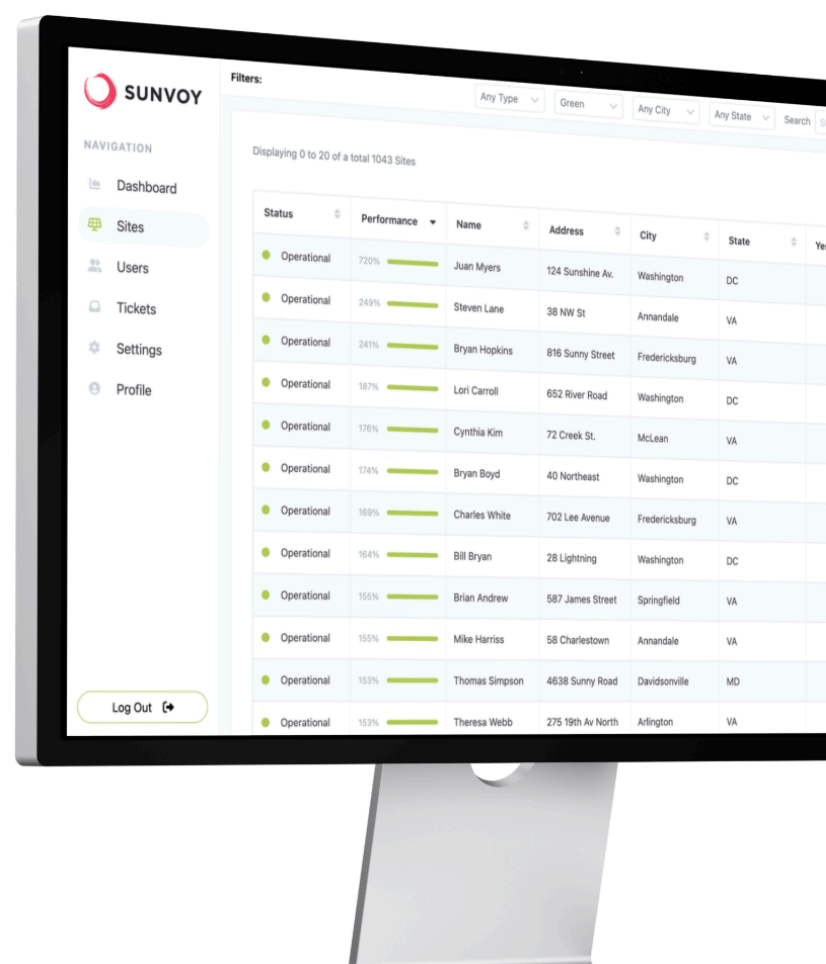
And within this guide, we'll explore how **you can use Sunvoy to improve the often frustrating operations and maintenance part of your solar business** and make it contribute positively to your bottom line. Here's a preview of what Sunvoy offers:

- **Quick Search & Filter Tools**

Sunvoy's search and filter tools make it easy to **find specific customer sites in seconds**.

For example, if you want to locate a site *by name, address, or other attributes*, you can refine your search quickly.

This saves time, especially when managing a large fleet.



- **Track Construction & Production**

Ever wonder in which construction step a particular site is stuck and which ones are already up and running?

With Sunvoy, it's clear at a quick glance. You can easily keep track of progress without digging through extra details, so you always know where each site stands.

- **Customer View**

Sunvoy also lets you see things from your customer's perspective. With the Customer View, you can get a better sense of what they experience in their app, helping you provide faster, more thoughtful support when they reach out with questions.

- **Real-time System Statuses**

Keep your finger on the pulse of every system.

Sunvoy pulls data directly from the inverter and gives you live updates on system health. It's a simple way to catch issues early and deal with them before they turn into bigger problems.

- **Automated Alerts for Underperformance**

Sunvoy doesn't just passively track performance—it lets you know if something's off.

If a system isn't performing as expected, you'll get a notification before things escalate, giving you time to take action before the customer notices.

- **Automated O&M Tasks**

It's worth noting that Sunvoy's automation tools help with the repetitive stuff, like checking connectivity or sending troubleshooting tips to customers.

It frees up your team's time so they can focus on the bigger tasks that need more attention.

- **Seamless CRM Integration**

If you're already using a CRM, Sunvoy works right alongside it. You can manage and track tickets directly in Sunvoy, so nothing gets overlooked.

Additionally, automations can notify your team or create work orders within your CRM automatically, making sure everything keeps moving smoothly.

Trusted by Industry Leaders

[Click here to find out](#) what some of the largest solar installers in the country and worldwide love about Sunvoy.



1. Leverage the “Sites List” for smarter O&M

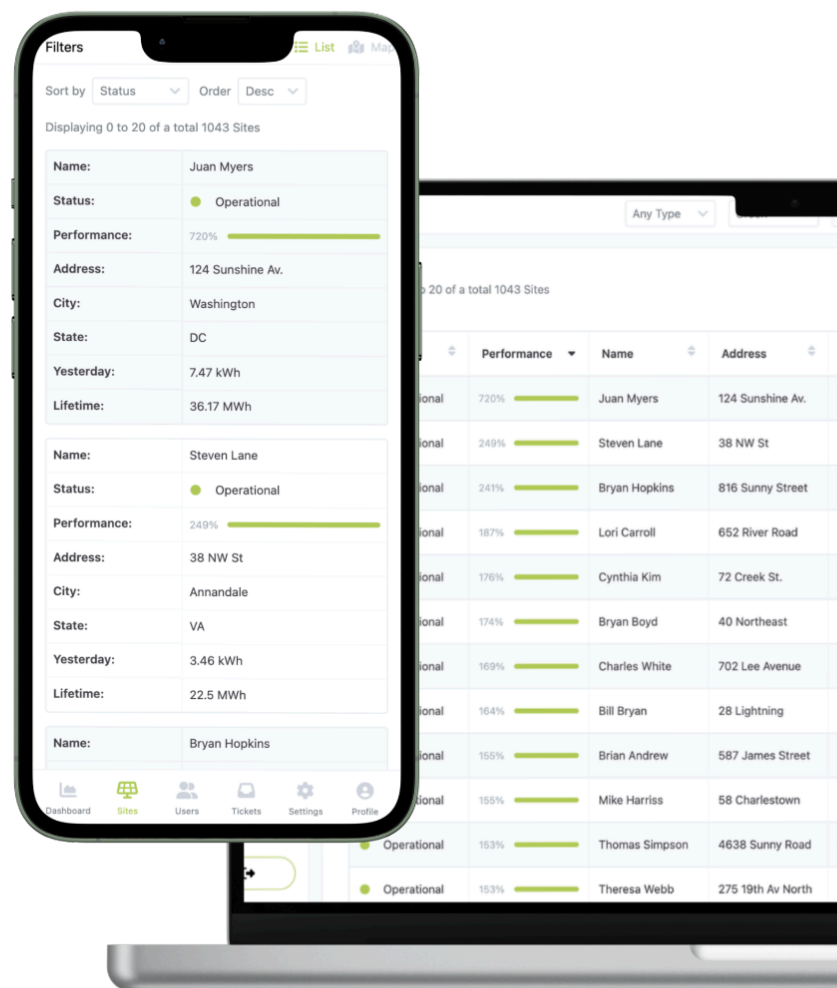
Sunvoy’s Sites List is an extremely helpful tool for keeping track of all your customer sites, whether they’re still “under construction” or already “producing” power. This feature helps you streamline operations and maintenance by giving you quick access to key data.

The Sites List comes with powerful filtering options, so you can easily sort through sites based on various criteria. This makes it simple to find exactly what you need as it joins together information from each of your important portals.

Each entry in the list also offers important information about the site, like *its current inverter status or last reported daily production*.

Sites are either labeled as “Under Construction” or show a colored Inverter Status, which gives you a quick snapshot of the system’s performance. *(You’ll find more about these status codes in our training guide once you have signed up.)*

You can also switch between a list view and a map view, depending on how you prefer to manage your sites. This added flexibility makes it easier to stay on top of things and ensures nothing slips through the cracks.



2. Check what the app looks like for customers

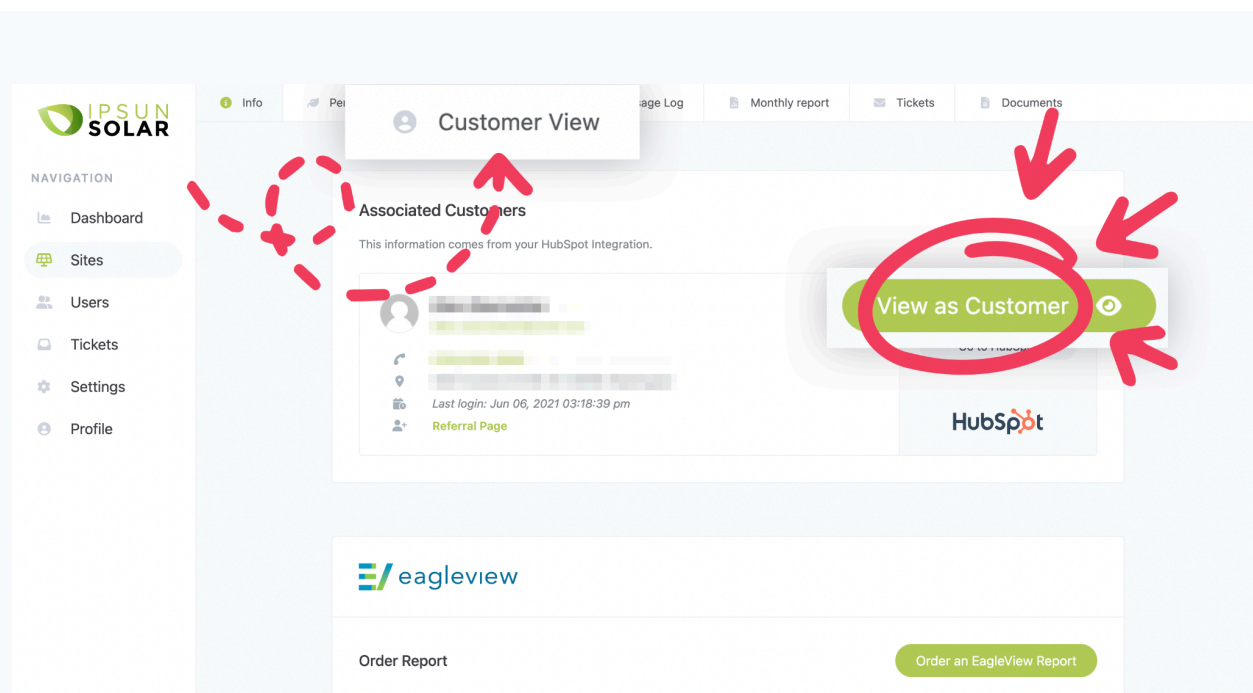
Sunvoy also makes it easy to see exactly what your homeowners see.

When you click on an individual Site within the Sites List or Map View, you can display the app as it appears to your customers. This can be done in two simple ways:

1. Click on the Customer View tab in the top navigation bar.
2. Scroll down to the Associated Customers section and click View as Customer.

This feature is especially helpful because it gives you a clear understanding of what the homeowner experiences.

Whether you're answering customer questions or troubleshooting an issue, **seeing things from their perspective allows you to provide better, more efficient support** and compare data directly with what comes from the inverter portal.



3. Make use of the “Construction View”

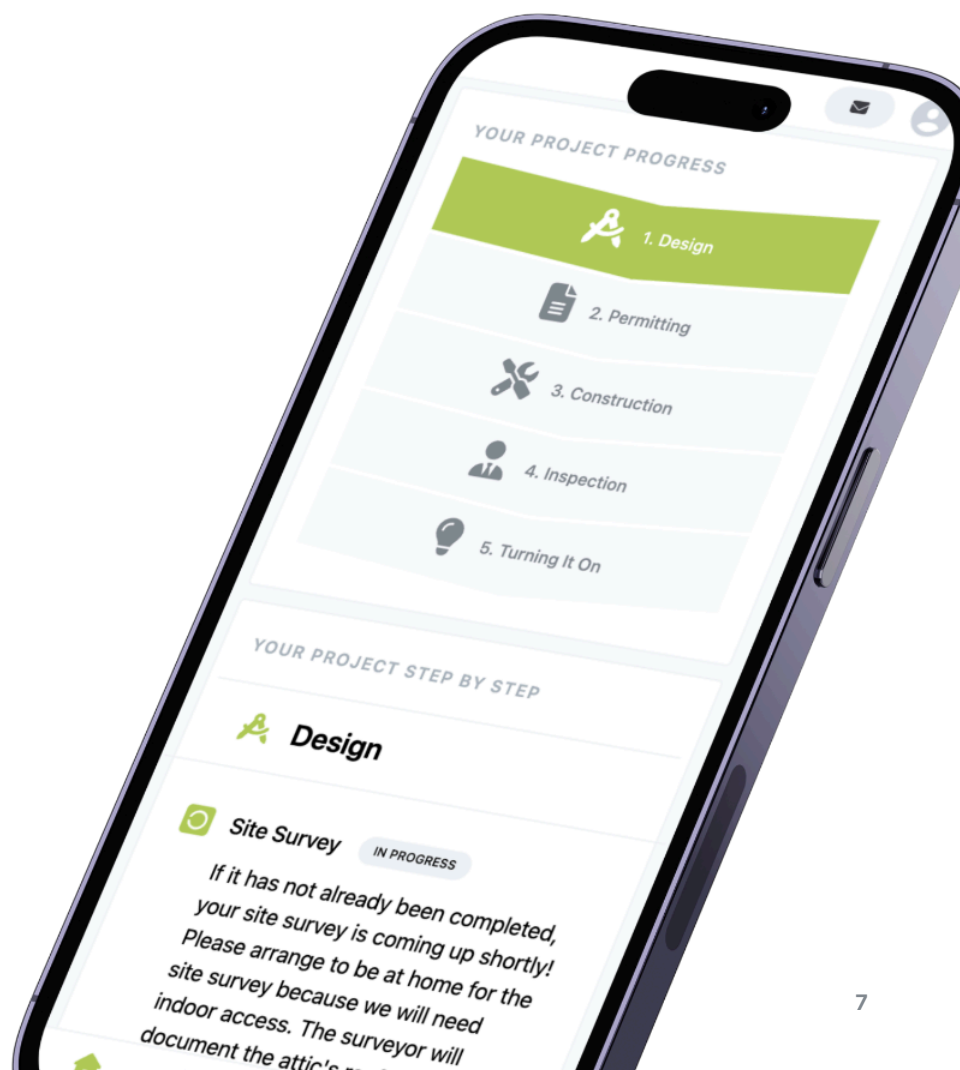
Think about your customer experience – wouldn't it be extremely helpful if your customers can view your process real-time and in detail?

Sunvoy's “**Construction View**” lets you do exactly this.

For customers whose sites are still under construction, the Construction View breaks down the Project Phases and Steps. These steps automatically update as the project moves forward in your CRM, providing customers with a live, detailed view of what's happening.

The logic behind these steps is set up by an admin under Settings » CRM » Phases, where you can customize everything to match your workflow. You can also control which projects sync with Sunvoy, so only relevant, active projects appear for the customer—**avoiding confusion over incomplete or unsold projects.**

This feature helps give homeowners peace of mind, keeping them informed without the need for constant status update calls, which in turn makes their experience smoother and more transparent.



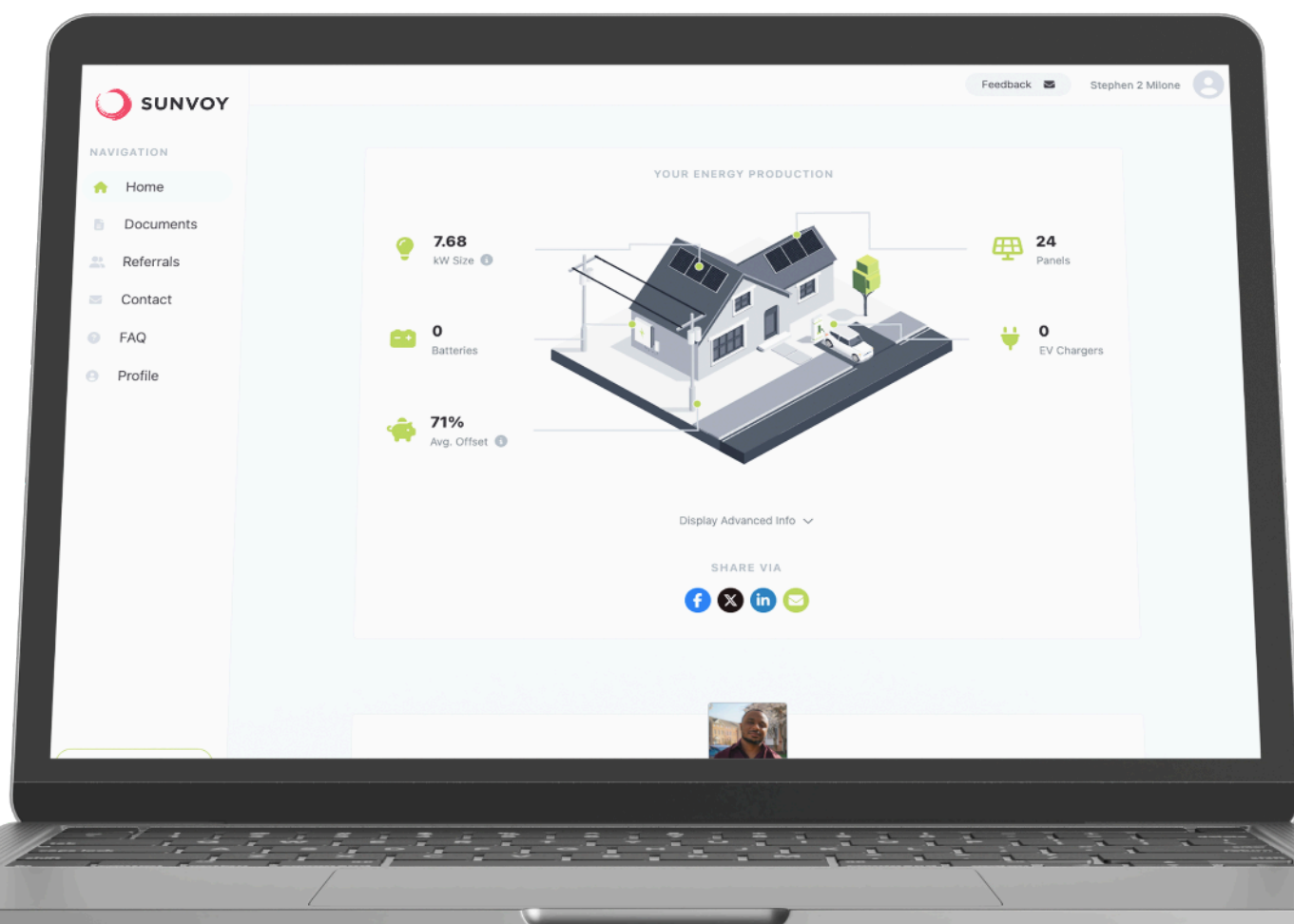
"System Info Widget"

Another helpful tool in the Customer View is the **System Info Widget**. This widget displays essential project-related information, such as the *number of panels installed or the kW size of the system*.

Note that it is automatically synced from your CRM.

For homeowners, this info helps them understand their system's scale and feel more confident in the process.

On your end, it's a helpful tool for answering questions quickly and accurately by knowing exactly what components were installed without having to dig through files, improving the overall customer experience.



4. Update your CRM regularly

Keeping your CRM up to date is crucial to ensure that Sunvoy reflects the latest, real-time data.

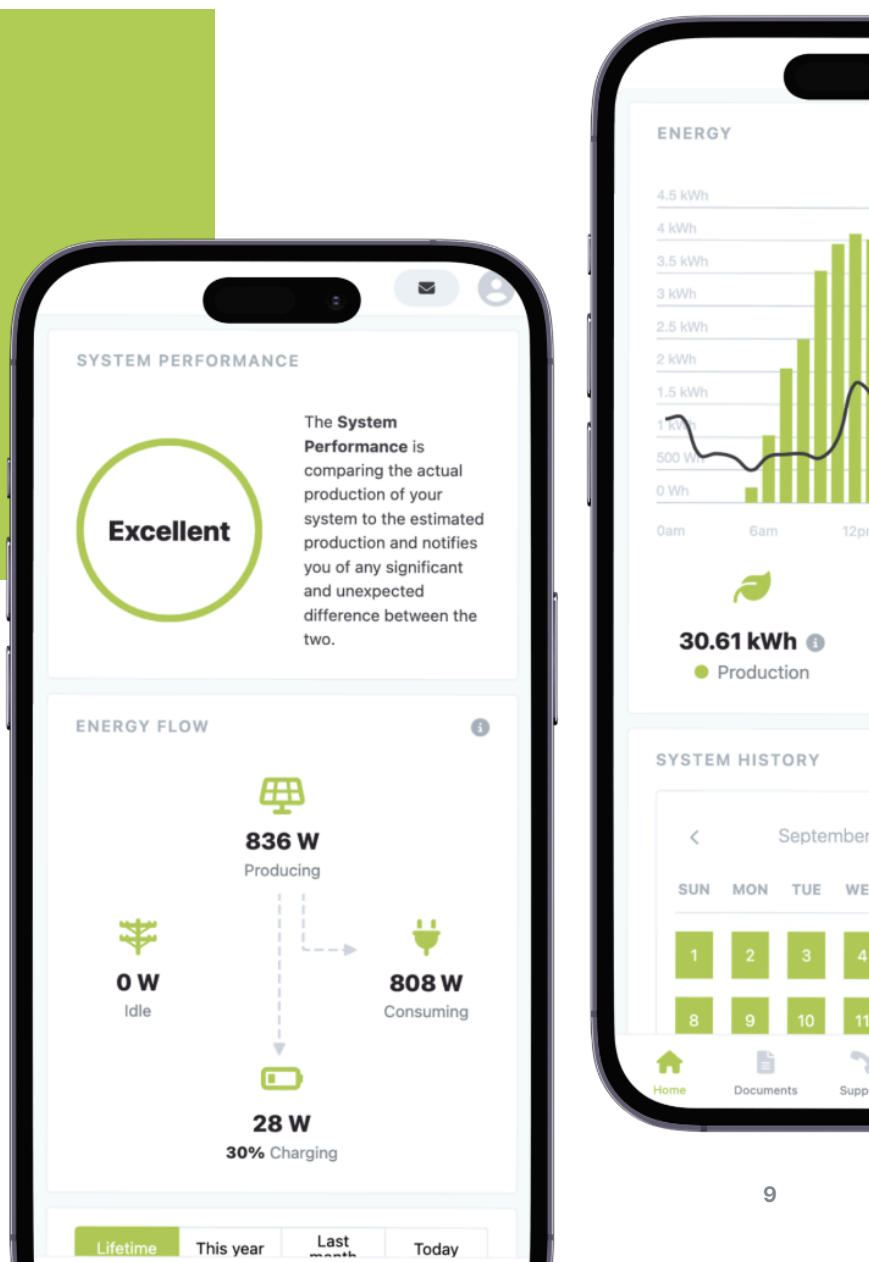
The good news is that Sunvoy **syncs projects immediately**, so any changes you make in your CRM are reflected right away in Sunvoy.

Updates are synced almost instantly through webhooks, so if you modify something in the CRM, Sunvoy catches that change quickly.

As for Inverter Portals, updates are synced between every hour and once per day.

So, if you add a new system or there's a status code change for an existing system in the Inverter Portal, it will appear the next day.

This feature is especially helpful in keeping both your team and your customers in the loop with accurate, timely data.



5. Understand and utilize Site Status Codes

Sunvoy uses Site Status Codes to provide a quick snapshot of each site's current state, falling into four distinct categories:

- ◉ **Gray "Construction" Status**

When a site is still under construction and doesn't yet have an associated system, it will display a gray "under construction" status.

This status is independent of any "Project Phases and Steps" or CRM logic—it simply means the system hasn't been installed yet.

Once a live production system is associated with the site, Sunvoy switches to showing the Inverter Status Code, which can be one of three colors:

- ◉ **Green Status**

This usually means that the system is online, producing power and reporting just fine.

- ◉ **Yellow Status**

This usually indicates some kind of reporting or communication error.

- ◉ **Red Status**

This usually indicates some kind of production error and that the system is most likely offline.

6. Provide estimated production data

Sunvoy allows your team to easily associate estimated production data with each site, which gives you deeper insights into the actual system performance.

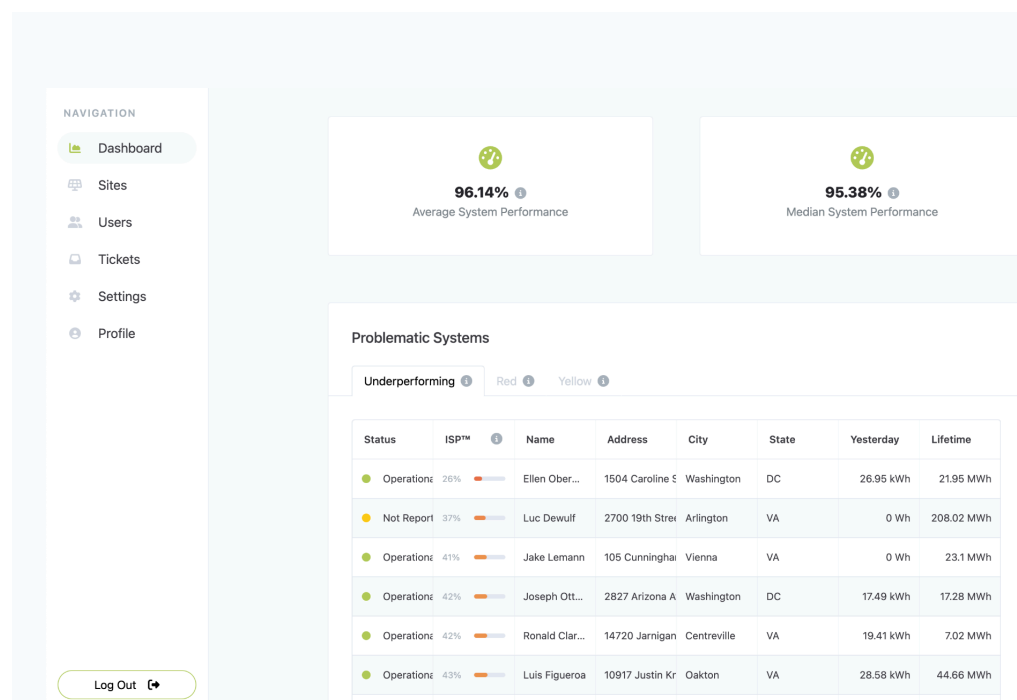
There are a few ways to do this:

- Use Sunvoy's proposal and design tool integrations.
- Import the data directly from your CRM.
- Or, if needed, manually enter the estimated production data for each site.

Once the estimated production data is available, you can navigate to the **Performance tab to compare actual vs. estimated production.**

Sunvoy automatically analyzes this comparison across your entire fleet and provides you a clear view of how each system is performing in relation to its expected output.

The results are conveniently displayed on the Dashboard and within the Sites List, helping you quickly identify underperforming systems and stay proactive in your maintenance efforts.



7. Automatically troubleshoot connectivity issues

One of the most common O&M challenges is dealing with inverter connectivity issues.

Sunvoy helps take care of this with automation.

With just a few clicks, administrators can set up automated notifications to alert customers if their system experiences communication problems—like an inverter losing internet connectivity. These notifications can include helpful links **to FAQs, so homeowners can fix issues like reconnecting their WiFi themselves.**

Sunvoy **also actively monitors systems that stop producing power**, and after a certain number of days, it **sends the homeowner a notification with instructions on how to reconnect.**

This helps reduce downtime and keeps customer



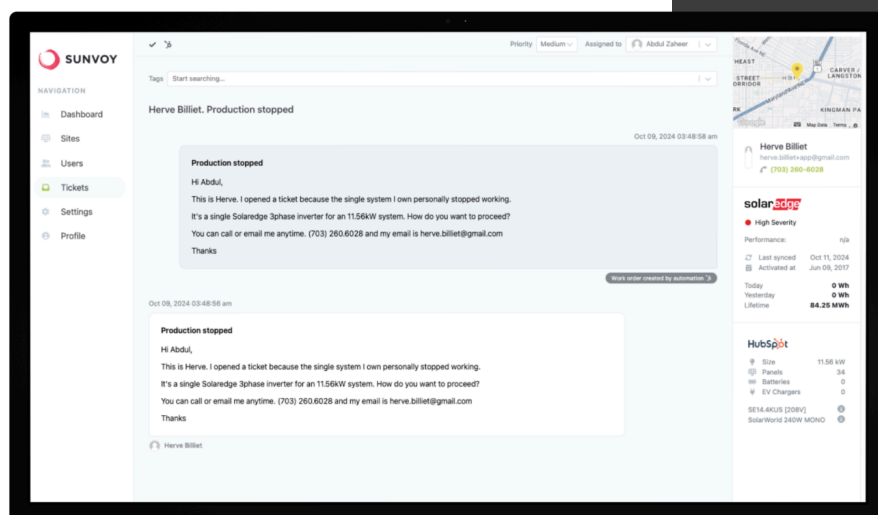
8. Improve your ticket management system

Sunvoy also helps streamline your support and ticketing processes. If enabled, customers **can create new support tickets right from their customer portal**.

During the construction phase, you may also want to display a Contact Form instead, directing inquiries to your Sales or Project Manager. Then, once the system is fully operational, you can route tickets directly to the O&M team for faster resolution.

You can view tickets for a specific site by clicking on the site and going to the Tickets area. For a broader view, you can check out the general Tickets area, where all submitted tickets are listed alongside with detailed information from your CRM and inverter.

Sunvoy also integrates with your automations, so you can notify the O&M team of new tickets or create work orders within your CRM.



Create a new Support Ticket

Title

Description (Please be as specific as possible)

Attachments

Choose Files

Cancel

Create Ticket

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Now What?

After reading through all this material you might be overwhelmed and wondering: **How can I implement this and achieve similar or better results for my own company?**

Truth to be told:

The first urge of just grabbing this white paper and handing it to your marketing and sales department will not achieve anything. *(We know from our own painful experience that knowledge alone doesn't cut it).*

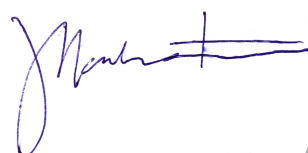
Nor should you just toss this aside and get back to the day to day craziness of putting out fires while running your business.

The good news is that we have already done the work for you.

And we actually decided to **offer free audits** to any solar installer that wants to see for themselves **how they can completely transform their business over the next 12 months without any extra spend on marketing or hiring new employees.**

[**Click here to book a free call**](#) with our principal Co-Founder and COO **Joe Marhamati**. He will help you personally uncover your biggest opportunities and blind spots. And if it's a fit, he will show you what it would look like to have our team working alongside yours and use our tailor made software to implement some of these strategies.

Book your free audit right now →



Time to take ACTION

At this point, you and your team have all the necessary information. **Now it's time to take action and apply what you've learned to ensure your company maximizes the benefits of Sunvoy.**

Simply follow this checklist::

☒ ~~Read this free whitepaper~~

☐ [Book a free audit](#)

☐ Set up your own white-labeled app

☐ Make sure your app is published in Apple & Google App Stores

☐ Go checkout the /sites list and search and filter for a couple of your projects

☐ Find a site that is still under construction and displays the phases & steps

☐ Click on "View as customer" and check what the app looks like for them

☐ Return to your own account by clicking on "Logout" while being logged in as a customer

☐ Find a site that is already live and checkout the energy production

☐ Locate the "Refresh System" Button and manually refresh a project or system

☐ Click through to the Inverter Portal from a Site

☐ Check if your app is already importing estimated production data and check it for a particular site

☐ Head to the Dashboard and scroll down to the "problematic Systems" widget

☐ [Watch the Video on the difference between a Site, System and Project](#)

☐ [Watch the Video on how to reset the password for a homeowner](#)

☐ Go to Settings » Messaging » Monthly report and enable the monthly report

☐ Checkout other videos on the [Sunvoy YouTube Channel](#) and subscribe for updates