

How to use SolarERP

Step by step, from the free demo to your first invoice. Menu names are shown in English, as they appear in the app.

Contents

- | | |
|--|----------------------------|
| 1. Start your free demo | 2. Set up your company |
| 3. Add your team | 4. Add leads and consumers |
| 5. Make a proposal | 6. Collect documents (KYC) |
| 7. Track PM Surya Ghar and MSEDCL work | 8. Installation jobs |
| 9. Estimates, invoices and payments | 10. Items and stock |
| 11. WhatsApp and email | 12. After the demo month |
-



1. Start your free demo

The demo is free for one month and holds up to 5 consumers. No card is needed.

- 1 Open solarerp.saiitechsolarenergy.com/register on a computer or phone.
- 2 Keep the "Demo" plan selected and press Continue with Demo. Then write your company name, your name, email, mobile and a password (8 letters or more).
- 3 Press Start Free Trial. You are now the admin of your own company. Your data is separate from every other company.
- 4 A yellow strip at the top shows the days left in the demo.

Good to know: During the demo, bulk WhatsApp and email campaigns are switched off. Everything else can be tried.



2. Set up your company

Your name, logo and GST number appear on proposals, estimates and invoices.

- 1 Open Settings > Settings. Fill in address, phone, email, GST and PAN, and upload your logo.
- 2 Settings > Financial Year: check the current year (April to March).
- 3 Settings > Doc Prefixes: choose how invoice and estimate numbers start (for example INV-).
- 4 Settings > Tax Groups: keep the GST rates you use for solar systems and parts.



3. Add your team

Each person logs in with their own email and sees only what their role allows.

- 1 Open Team > Users and press Add User.
- 2 Pick a role: manager, office staff, channel partner (agent), electrician, fabricator or telecaller.
- 3 Channel partners see only their own consumers. Electricians see only the jobs given to them.

Good to know: The free demo allows 2 users. More users come with a paid plan.



4. Add leads and consumers

Every enquiry becomes a lead. When the customer agrees, the same record moves on as a consumer, so nothing is typed twice.

- 1 Consumers & Leads > All Customers > Add Customer. Write name, mobile, village, consumer number (from the light bill) and monthly bill.
- 2 Consumers & Leads > Leads shows the board: New, Contacted, Site visit, Quotation, Negotiation, Won, Lost. Drag a card to move it.
- 3 Set a follow-up date on each lead. Home > Todos & Follow-ups lists today's calls.

Good to know: Demo limit: 5 consumers in total (leads included). Delete test entries if you need room.



5. Make a proposal

A proposal shows the system, price, PM Surya Ghar subsidy and estimated savings, with your branding.

- 1 Solar Work › Proposals › New Proposal. Choose on-grid or hybrid and home, society or business.
- 2 Enter the kW, panels and inverter. The subsidy and bank EMI are worked out for you; check them before sending.
- 3 Press Share to send the live link on WhatsApp, or download the PDF.
- 4 Settings › Proposal Templates changes the look and the cover page.

Good to know: Savings in a proposal are an estimate. Tell the customer the exact figures come after the site visit.



6. Collect documents (KYC)

The customer uploads documents from a link on the phone. The list changes for cash, bank loan, co-applicant or name change.

- 1 Open the consumer and choose the payment type (cash or loan).
- 2 Send the document link. Aadhaar, light bill, bank passbook, PAN and photos arrive in the consumer's file.
- 3 Solar Work › Generate Document makes the MSEDCL and PM Surya Ghar forms filled with the consumer's details.



7. Track PM Surya Ghar and MSEDCL work

Each consumer moves through stages from enquiry to net meter and subsidy. You always see who is waiting for what.

- 1 Open the consumer and move the stage when a step is done (for example documents ready, loan sanctioned, installed, net meter).
 - 2 Consumers & Leads > PM Surya Ghar Applications lists each application and its status.
 - 3 The Dashboard shows overdue consumers first.
-



8. Installation jobs

Give each job to an electrician. They use the phone app to see the site and upload photos and panel serial numbers.

- 1 Solar Work > Installation Jobs: choose the electrician and the fabricator for each consumer, and set their rates.
 - 2 The electrician opens My Installation Jobs on the phone (with call, WhatsApp and directions), takes GPS site photos and photographs the panel labels; serial numbers are read from the photo.
 - 3 Check the uploads in Solar Work > Electrician Uploads.
-



9. Estimates, invoices and payments

GST estimates and tax invoices with your logo, and a record of every payment received.

- 1 Sale › Estimate / Quote: pick the customer, add items and send.
- 2 When the customer agrees, open the estimate and press Convert to Tax Invoice.
- 3 Record money received in Sale › Payment-In. Loan cases: Consumers & Leads › Fund Tracker shows what each bank still has to release.

Good to know: An invoice once issued stays as it is. Use a credit note to correct it.



10. Items and stock

Keep panels, inverters, structure and cables with HSN and GST, and see what is in each godown.

- 1 Items & Stock › Items › Add item, or Import Items from an Excel sheet.
- 2 Purchase & Expense › Purchase Bills adds stock; sale invoices and delivery challans reduce it.
- 3 Items & Stock › Stock Balance and Reorder Alerts show what to buy.



11. WhatsApp and email

Link your own WhatsApp number so customers get updates at each stage from your number.

- 1 WhatsApp & Email Setup > WhatsApp QR Link: scan the QR code from WhatsApp on your office phone (Linked devices).
- 2 WhatsApp & Email Setup > WhatsApp Automation: switch on the messages you want (welcome, documents pending, installation date and so on).
- 3 WhatsApp & Email > WhatsApp Inbox lets the whole team answer chats.
- 4 WhatsApp & Email Setup > Email / SMTP: add your mail account to send invoices by email.

Good to know: Send messages only to customers who asked you for solar. Bulk campaigns open on a paid plan.



12. After the demo month

Your data stays. To keep adding consumers and proposals, choose a plan.

- 1 Open Backup & Admin > Subscription, pick a plan (monthly, yearly or lifetime) and pay online.
- 2 The new limits start as soon as the payment is confirmed. Nothing has to be entered again.
- 3 Need help? Call or WhatsApp SAIITECH SOLAR ENERGY on 9604434489 (Mon–Sat, 9:30 am – 7 pm).

Questions? Call or WhatsApp 9604434489.