# KALIWEB SYSTEM

Field Service & Ticketing System

## Solar Installers

Business guide — step by step, with screenshots
How your team works with KALIWEB SYSTEM every day

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# 1. KALIWEB SYSTEM for solar installers

For solar home systems, commercial and institutional installations, pumps and backups: size the system, quote it, install it, prove it at handover and keep it maintained — with panels, batteries and inverters tracked from the store to the roof.

This guide walks you through how a solar installer runs its day on KALIWEB SYSTEM: from the first call of a customer to the money in your account. Every step is shown with the screens your team will use. Kaliweb Systems sets the system up with you, trains your team and stays on WhatsApp and phone for support.

## 1.1 Before and after

| Today | With KALIWEB SYSTEM |
|---|---|
| Sizing on spreadsheets, retyped into a quotation | The solar calculator sizes the system and fills the quotation |
| Handover photos and readings lost in phones | Readings, photos and the customer's signature in the job report; a printed certificate |
| Serial numbers and warranties for panels and inverters hard to find | Every unit recorded at the customer with warranty dates |
| Maintenance visits forgotten after installation | Maintenance contracts raise visits by themselves |
| Deposits and balances followed in a notebook | Project milestones invoiced in one click and paid by M-Pesa |

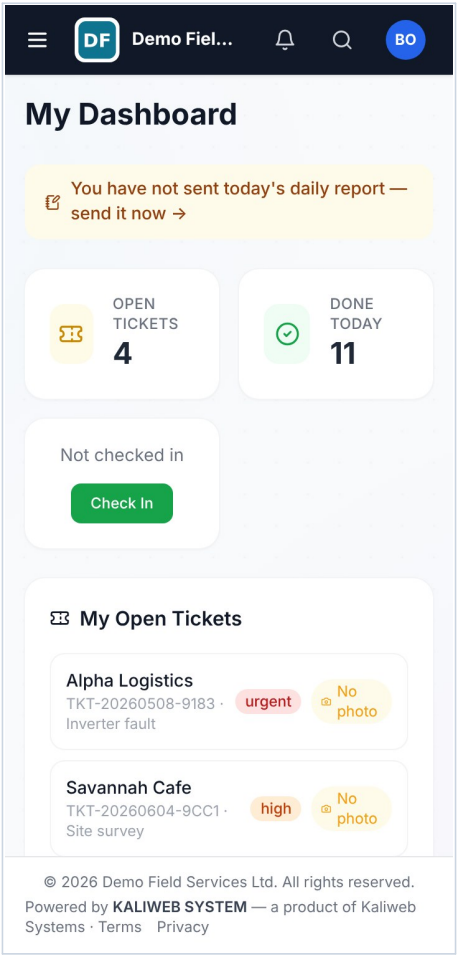
## 1.2 Who uses it in your company

Everyone signs in with their own username and only sees what their job needs. You can add your own roles (for example *store keeper* or *cashier*).

| Person | What they do in the system |
|---|---|
| Sales / customer care | Surveys, quotations, follow-up |
| Designer | Solar designs, materials lists |
| Technicians | Installations, handover readings, maintenance visits |
| Store | Panels, batteries, inverters and cable |
| Accounts | Deposits, milestone invoices, payments |
| Manager | Approvals, projects, reports |

## 1.3 Works on any phone, even without internet

Technicians open the system in the phone's browser and press *Add to Home screen*: it works like an app, with nothing to install from a store. Job reports, photos, signatures and materials used are kept on the phone when there is no network and are sent by themselves when the phone is back online.




*The technician's dashboard on a phone.*

# 2. Your first week

Kaliweb Systems prepares the system with you. This is what happens in the first days, so you know what to have ready.

1. **Company details and logo.** Your name, logo, address, phone and tax PIN go on every invoice, quotation, receipt and report.
2. **Branches and staff.** Add each branch and every staff member with their role. Technicians receive their login by SMS.
3. **Your services and job types.** Typical job types: *site survey*, *installation*, *maintenance visit*, *fault / repair*, *battery replacement*, *expansion*.
4. **Customers.** Your customers are imported from Excel; new customers can be added before any job, with location and type (home, business, school, church, hospital).
5. **Stock.** Panels, batteries, inverters and charge controllers are set with serial numbers; solar and battery cable in metres.
6. **Payments.** Your own M-Pesa paybill or till (or MTN / Airtel) and your bank account are connected, so customer payments are matched by themselves. The money goes straight to your account; Kaliweb never holds it.

**TIP** Start with one branch and a few technicians for the first week, then bring in everyone. Most teams are comfortable within two weeks.

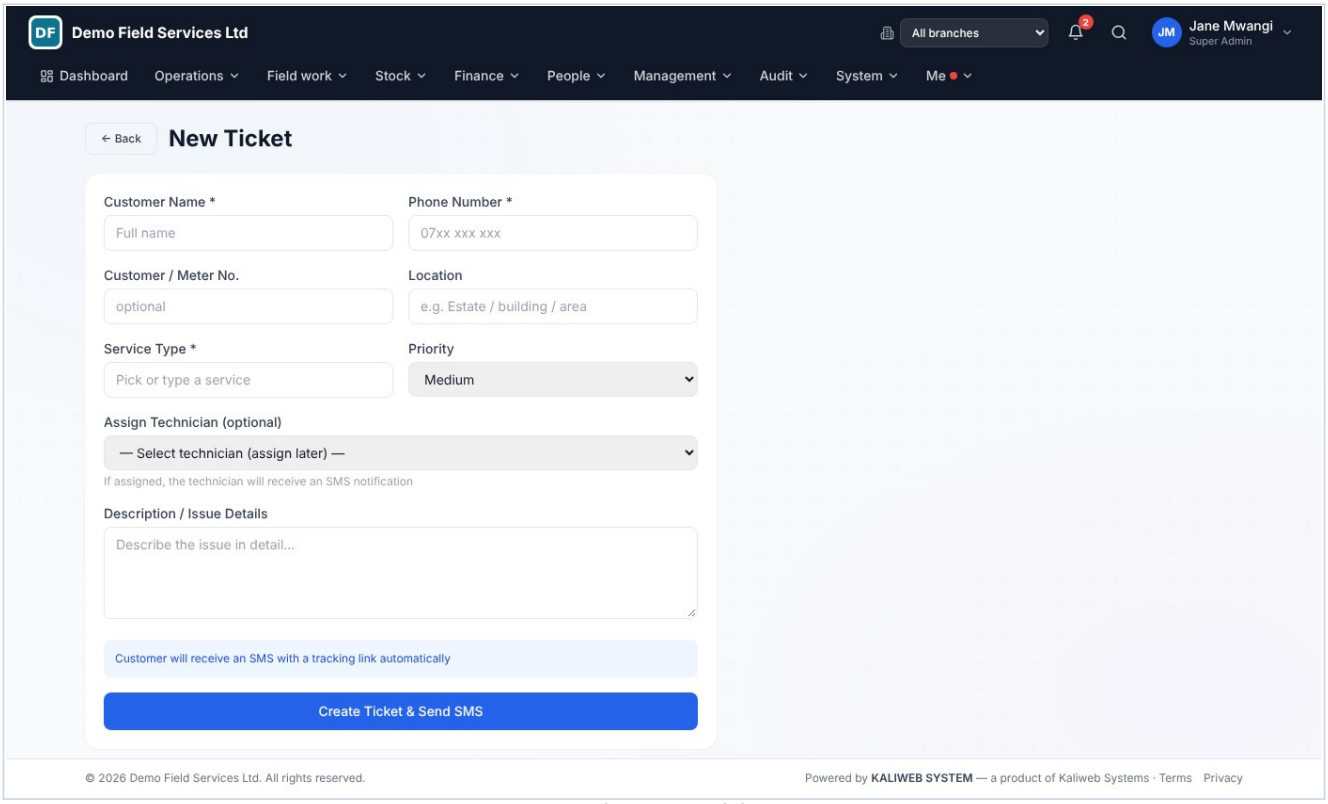
# 3. Every request is a ticket

A **ticket** is one customer request: a survey, an installation, a maintenance visit, a repair. It gets a number such as `TKT-20261001-B101` and the customer receives an SMS with a private **tracking link**.

## 3.1 Logging a request

Customer care opens **New Ticket**:

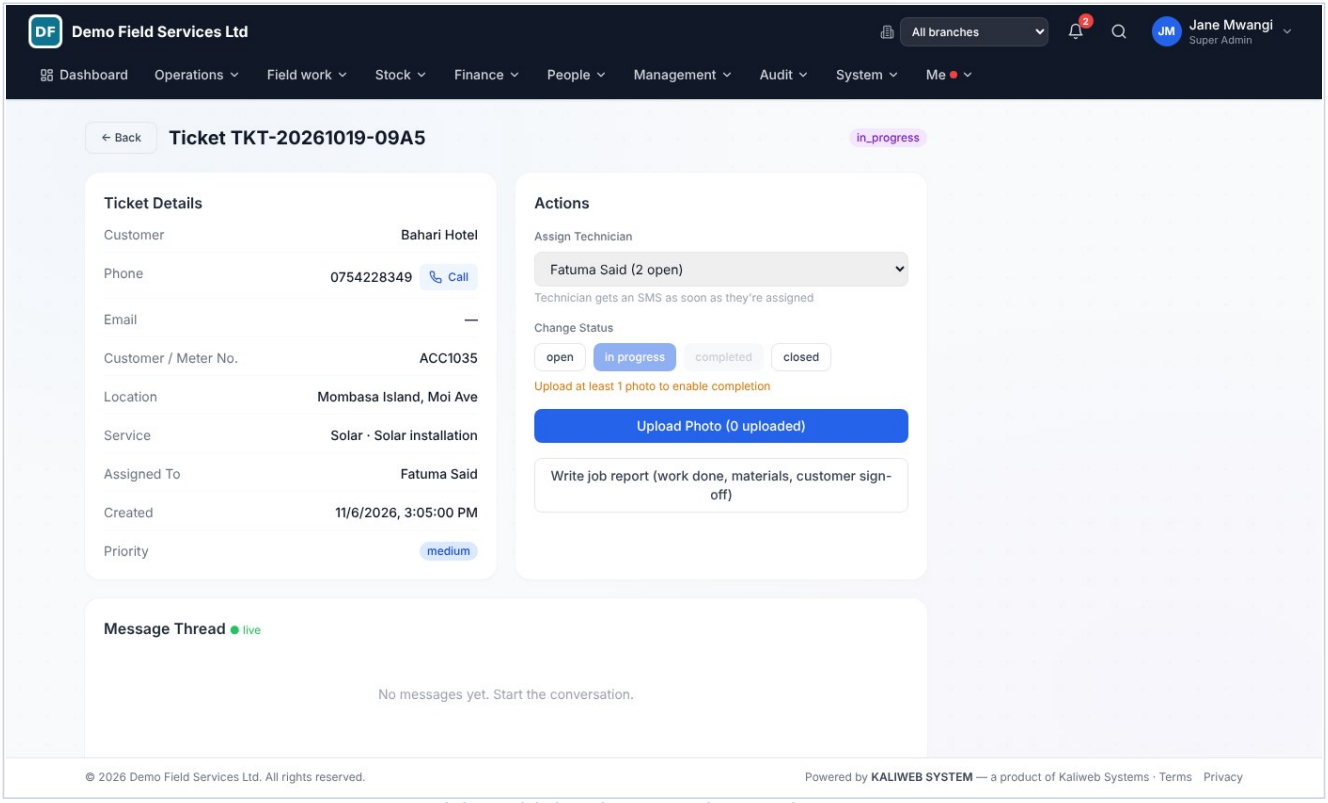
1. Type the customer's **phone number** — returning customers are recognised and their details filled in.
2. Add the **account number** and the **location**.
3. Choose the **job type** (survey, installation, maintenance, repair…), the **priority** and describe the problem.
4. Assign a **technician** now or later. A technician with an expired certificate is marked with a warning.
5. Press **Create Ticket & Send SMS**.




*Logging a new ticket.*

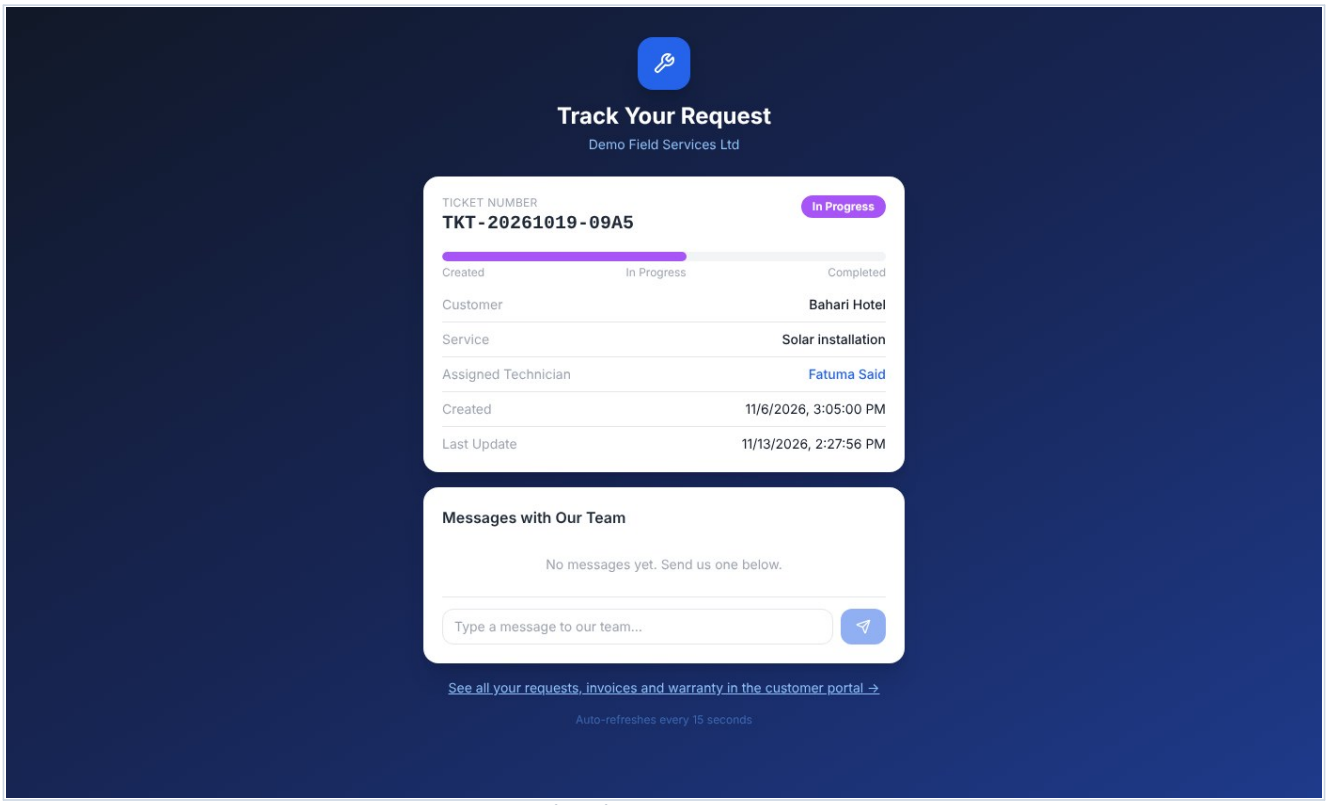
## 3.2 Following the work

The ticket list shows every request with its status — *open, assigned, in progress, completed, closed* — the technician and how long it has been waiting. Open a ticket to see everything about it: the customer, photos before and after, the message thread with your team and the customer, and the job report.




*A ticket with its photos, actions and messages.*

The customer follows the same job on their tracking page and can send a message to your team without calling.



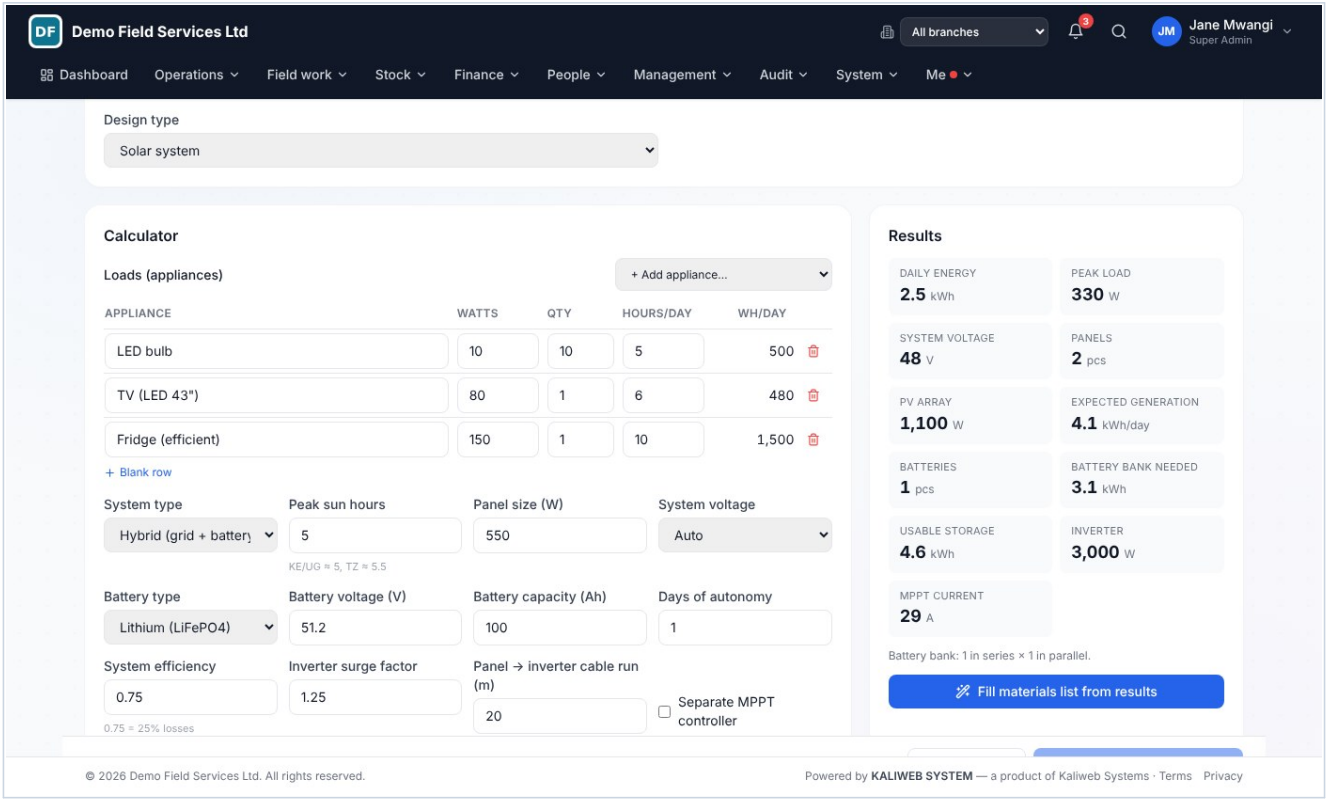

*What the customer sees.*

# 4. Size it and quote it

## 4.1 The solar design calculator

Open **Field work → Designs → Solar** after the survey:

1. List the customer's **appliances** with their power and hours of use — the calculator gives the **daily energy** in kWh.
2. Enter the sun hours and days of autonomy. It works out the **number of panels**, the **battery bank** (series × parallel), the **inverter** size and the **MPPT** current.
3. Press **Fill materials list from results**, add mounting, cable, protection and labour. Stock items take their cost plus your markup.
4. **Save & send for approval.** A supervisor or manager approves it — never the designer.

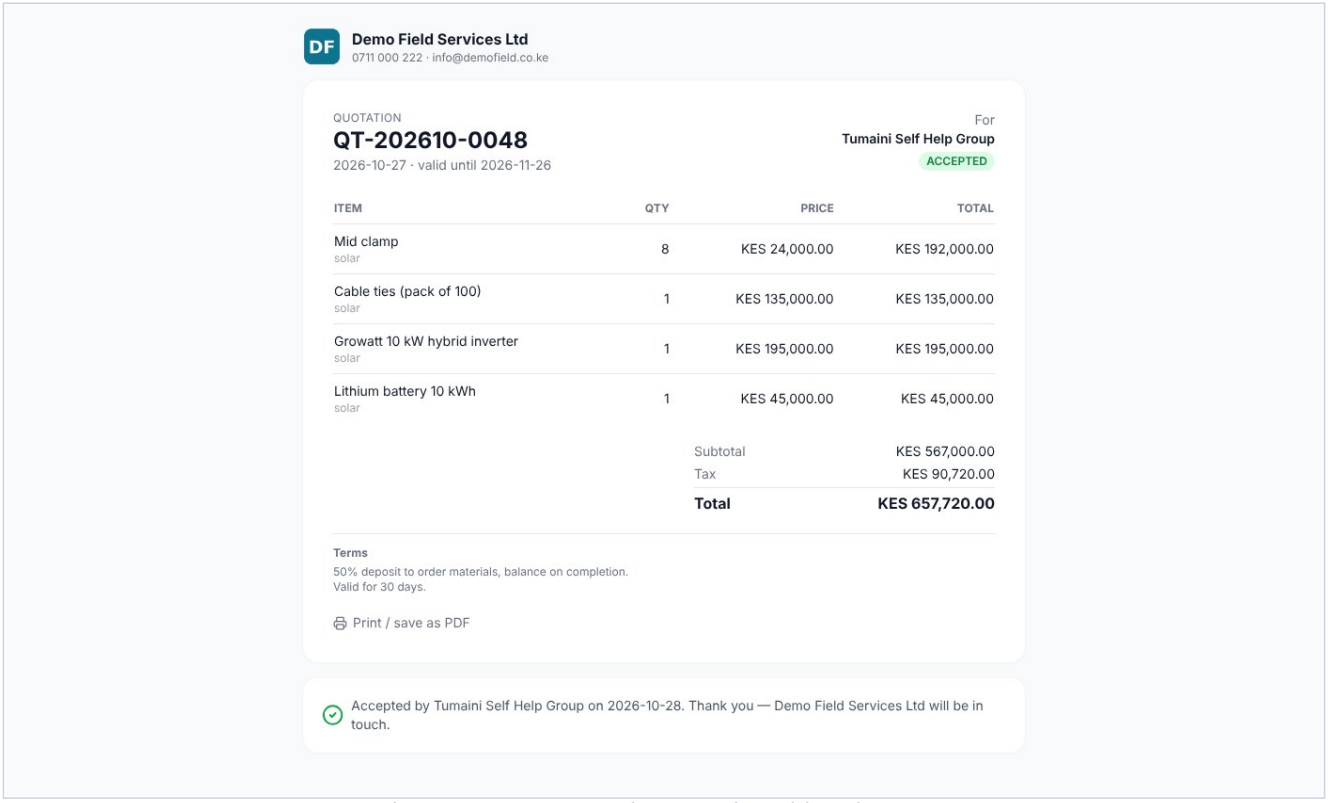



*The solar design calculator.*

> **NOTE** The calculator is a guide for a qualified person. Confirm the design with the makers' data sheets.

## 4.2 From design to signed quotation

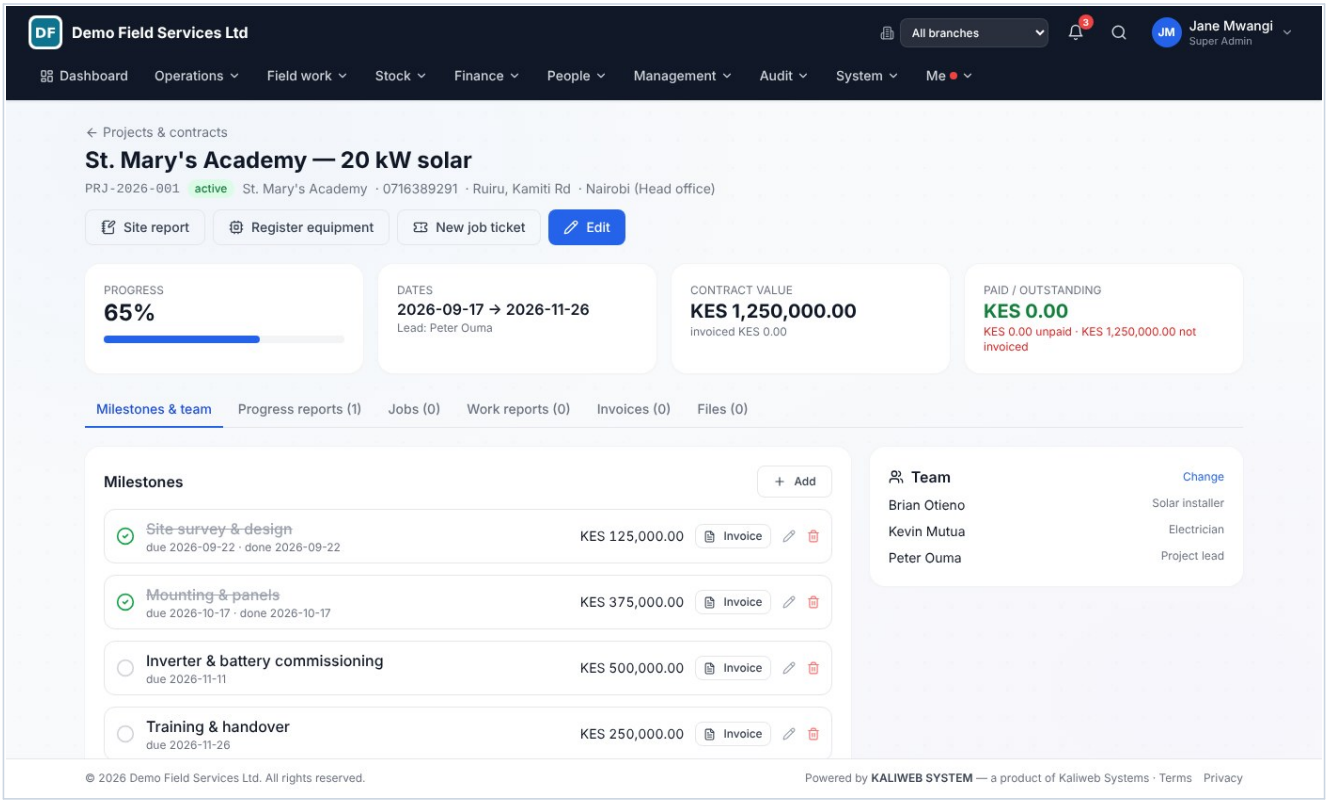
**Create quotation** from the approved design in one click and **Send**: the customer opens it on the phone and **accepts with their name and signature**. You are told when they open it and when they answer.




*The customer accepts the quotation with a signature.*

# 5. The installation as a project

**Field work → Projects & Contracts → Project:** contract value, team, linked tickets and **milestones** — for example *60% deposit*, *materials delivered*, *installation complete*, *handover*. Each milestone is invoiced in one click and the project shows what is paid and what is outstanding.




*A project with milestones, team and linked work.*

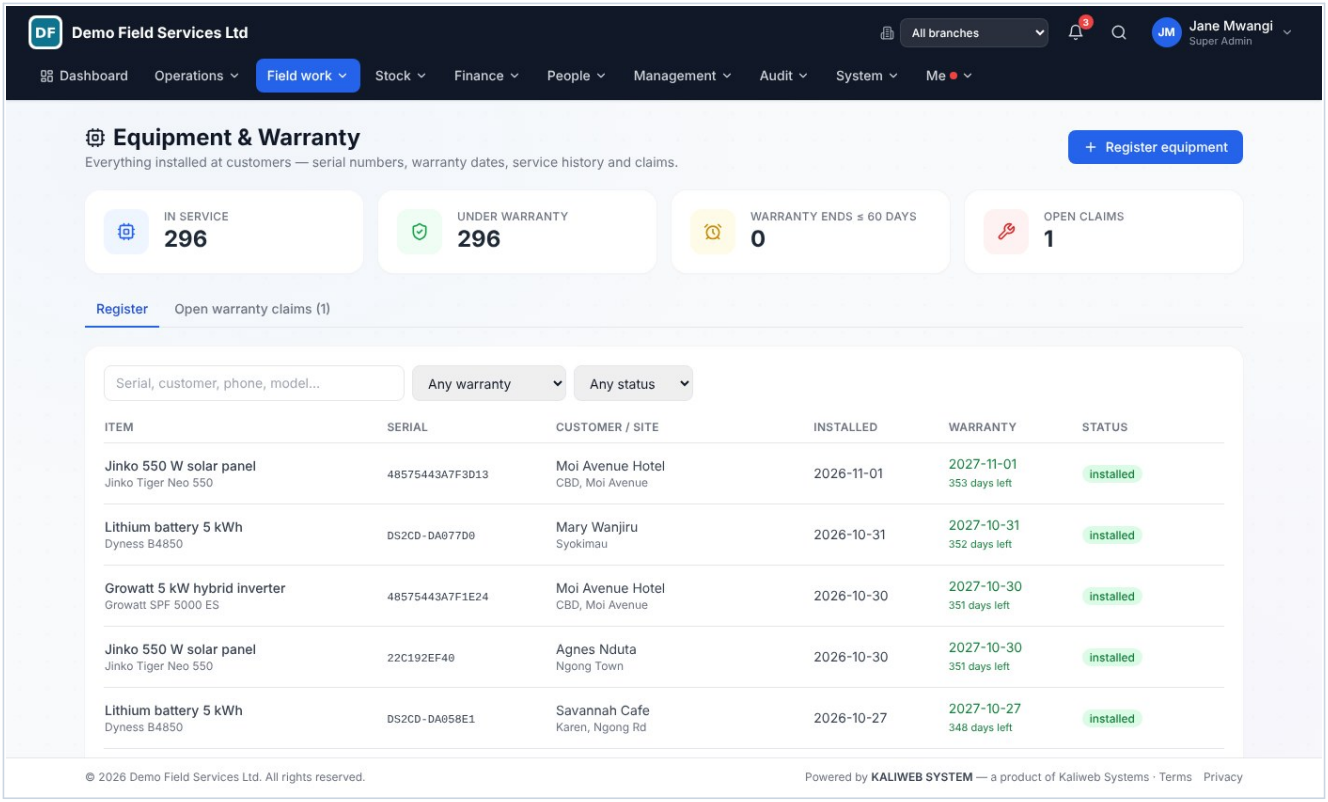
## 5.1 Handover

1. The store issues panels, batteries and inverter by **scanning their serial numbers**.
2. The technician installs, then records the **readings** — panel voltage and current, battery voltage, inverter output — and photos of the array, the battery bank and the labels.
3. Every unit is registered at the customer with the **installation date and warranty**.
4. The customer signs on the phone; you print the **completion / test certificate** on your letterhead.

# 6. After the installation

## 6.1 Equipment & warranty

**Equipment & Warranty** lists every panel, battery and inverter with its serial number, customer and warranty end. A customer calls about an inverter: search its serial number and see when it was installed, by whom, and whether it is still under warranty. **Warranty claims** follow the unit to the supplier and back; a replacement is registered by itself.




*Equipment & warranty.*

## 6.2 Maintenance contracts

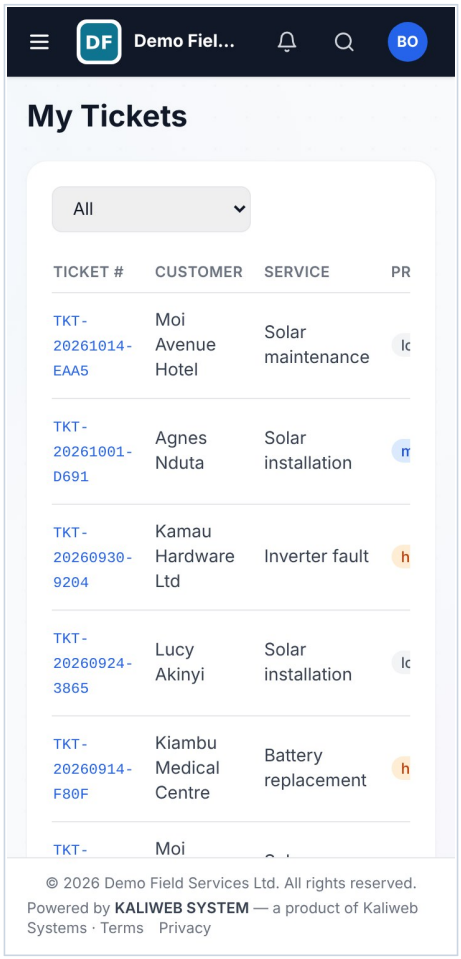
Sell a **maintenance contract** with the installation: visits every 3, 6 or 12 months. Three days before each visit a ticket is raised and assigned by itself; the technician cleans and checks the system with a checklist and records the readings. You are reminded before the contract ends.

> **TIP** Compare the readings of each visit with the handover readings. A battery bank losing voltage is a battery sale before it is a complaint.

# 7. The technician's day

## 7.1 Jobs and attendance

On arrival the technician presses **Check in**; **My Tickets** shows only their jobs for the day, with the customer's phone, location and directions.

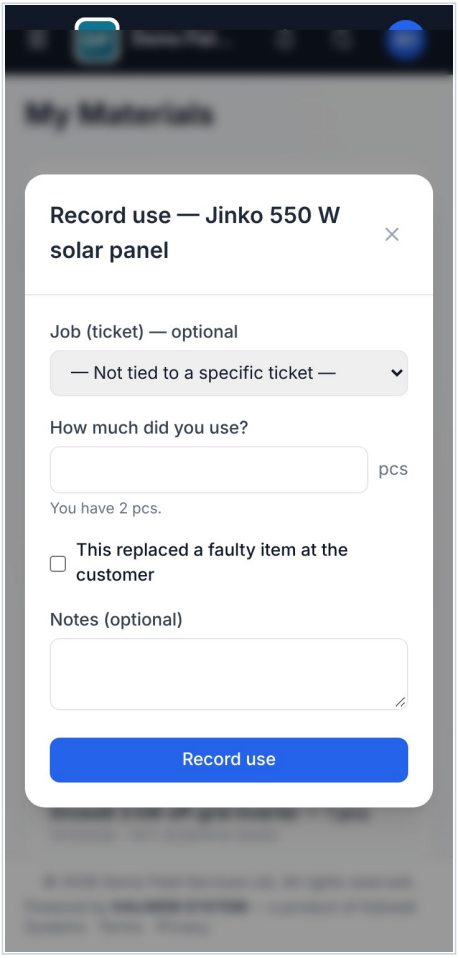



*My tickets on a phone.*

## 7.2 Materials

The store issues items to the technician; **My Materials** shows what they hold. After each job they press **Record use**:

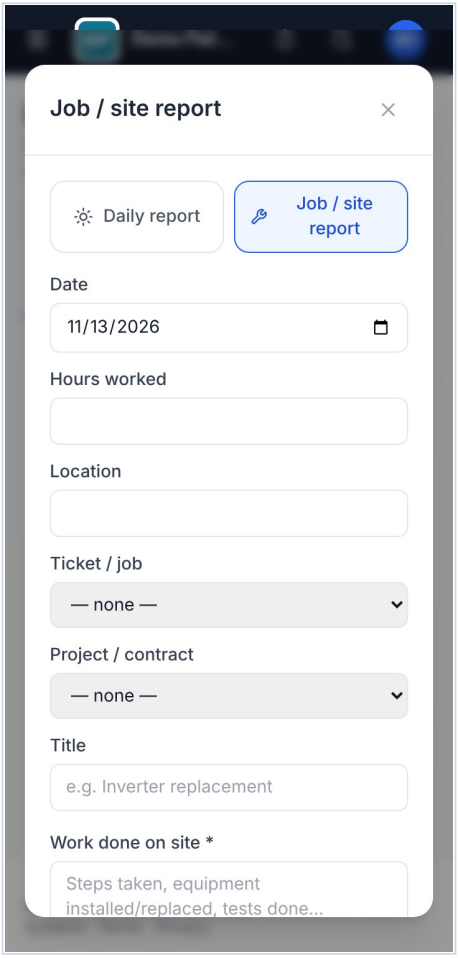
- Solar cable is recorded in metres: the technician enters the metres used and the rest stays with them.
- Items with serial numbers (panels, batteries, inverters, charge controllers) are scanned with the phone camera and recorded at that customer, with the installation date and warranty.
- A faulty item replaced at the customer is ticked as *replaced a faulty item* and must be handed in at the store.




*Recording what was used on a job.*

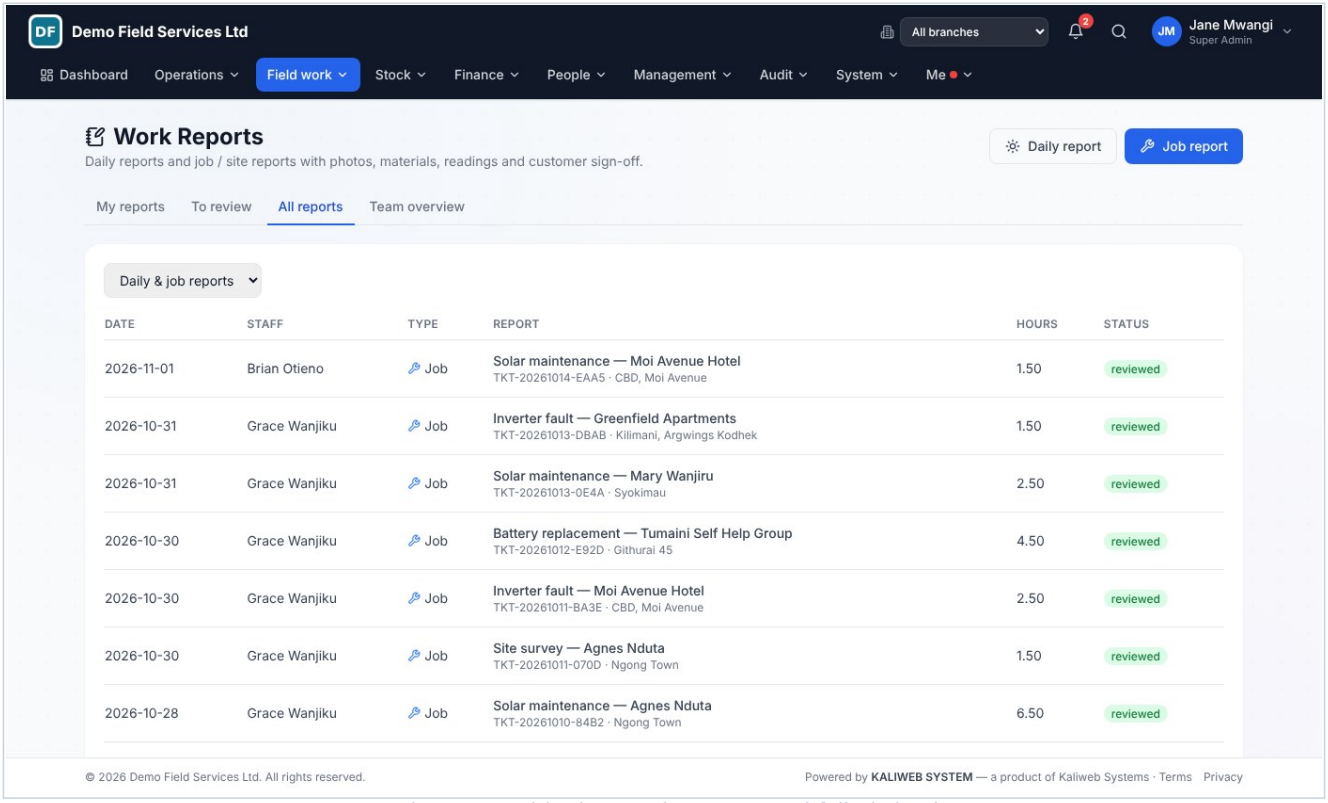
## 7.3 The job report

At the end of every visit the technician fills in the **job report** on the phone: work done, materials used, **readings (panel voltage and current, battery voltage, inverter output)**, photos and the **customer's name and signature** on the screen. Checklists for work at height and electrical isolation are completed before work starts.




*A job report on a phone.*

Supervisors review the report or return it with a comment. From an approved report you print a **completion / test certificate** on your letterhead with the readings, checklist results and signatures.



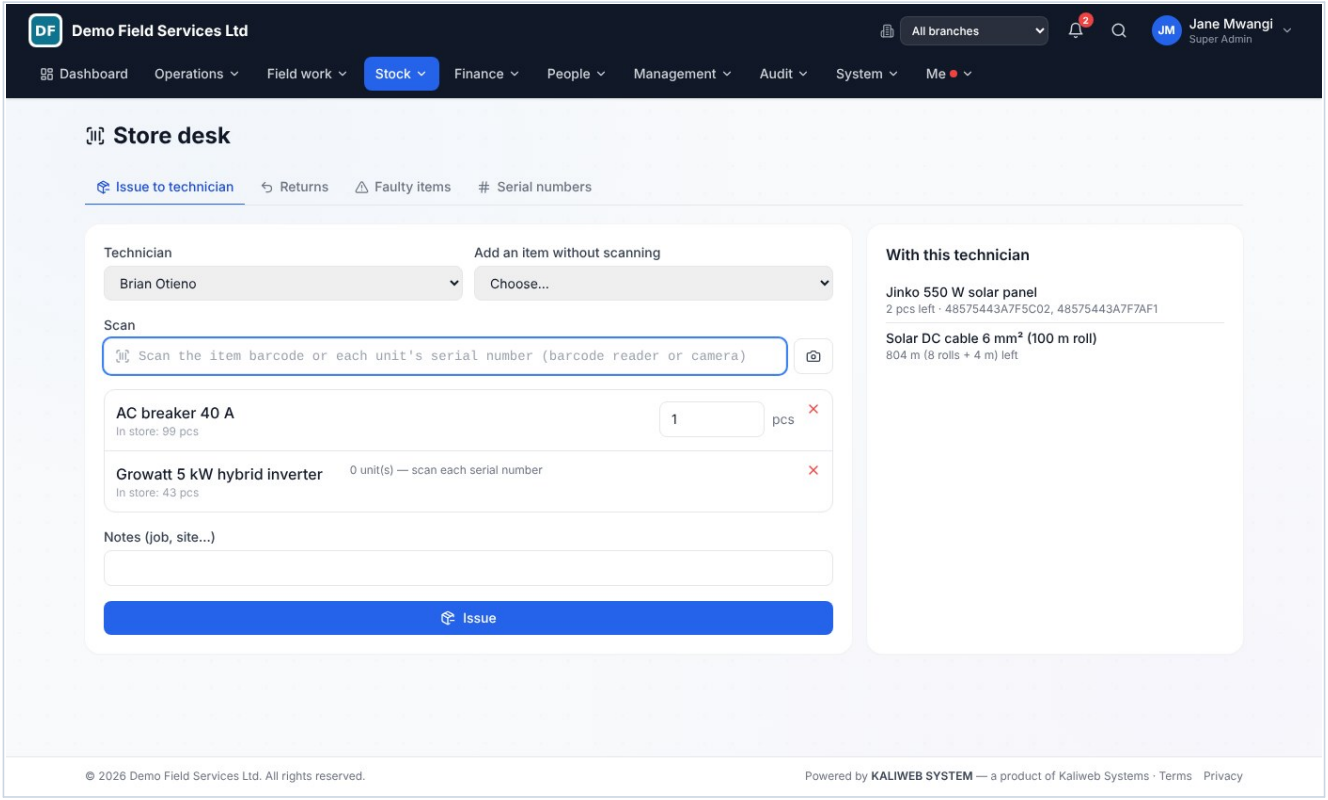

*Work reports with photos, signatures and failed checks.*

# 8. Stock: from the store to the customer

## 8.1 Items and the store desk

**Stock → Accessories** lists every item per branch with quantity and reorder level. Typical items: panels, batteries, inverters, charge controllers (MPPT), mounting rails, breakers, isolators, solar cable, connectors.

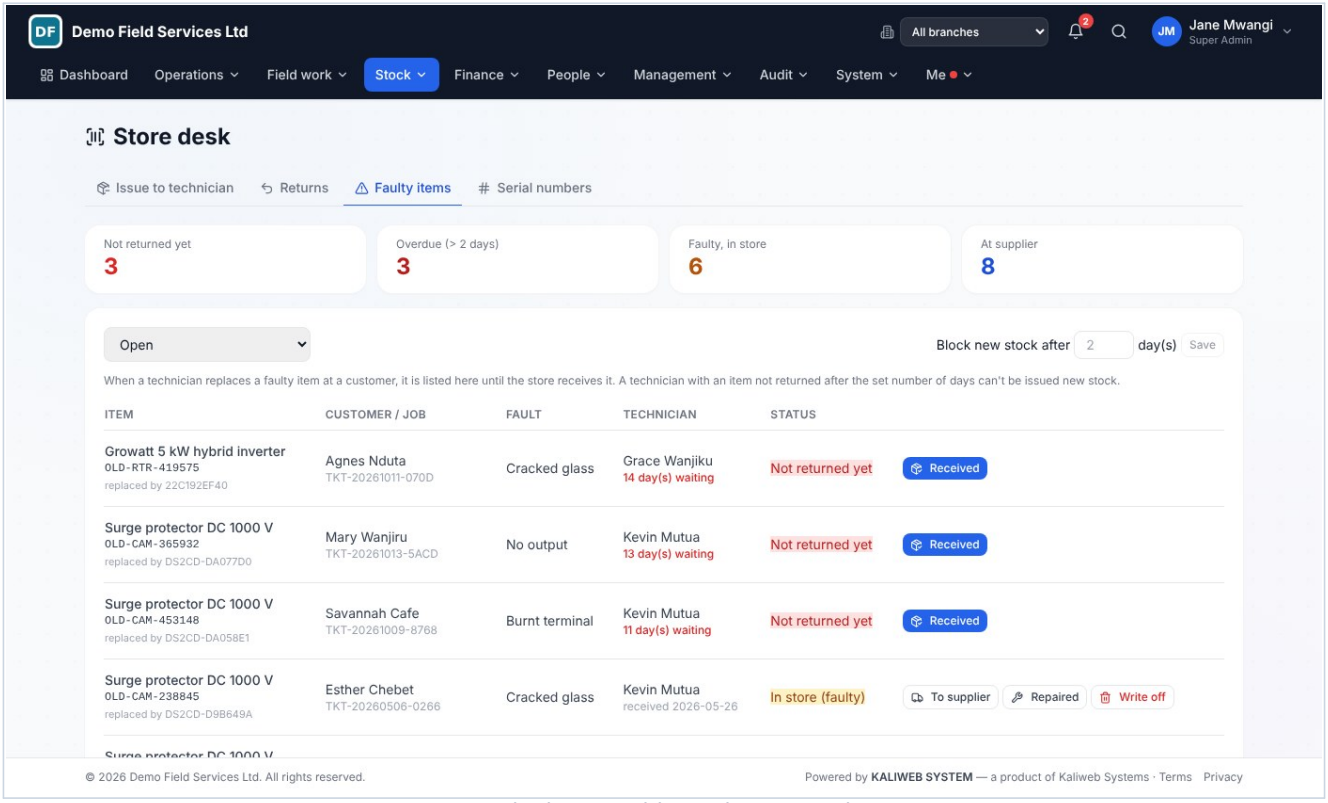
- **Cable** is kept in metres and issued by the roll or box; the technician records the metres used.
- **Serial-numbered items** are received, issued and returned by scanning, so you always know which unit is in the store, with which technician or at which customer.
- At the **store desk** the store keeper issues items to a technician by scanning; the screen shows what that technician already holds and any faulty item they still owe.




*Issuing a roll of cable and a unit scanned by its serial number.*

## 8.2 Buying and faulty items

- **Purchasing:** one click adds every low-stock item to a purchase order; a manager approves it (never the person who raised it); goods received are added at the average cost.
- **Faulty items:** every unit replaced at a customer is tracked until it is returned, sent to the supplier, repaired or written off. A technician who keeps a faulty unit too long can't take new stock.

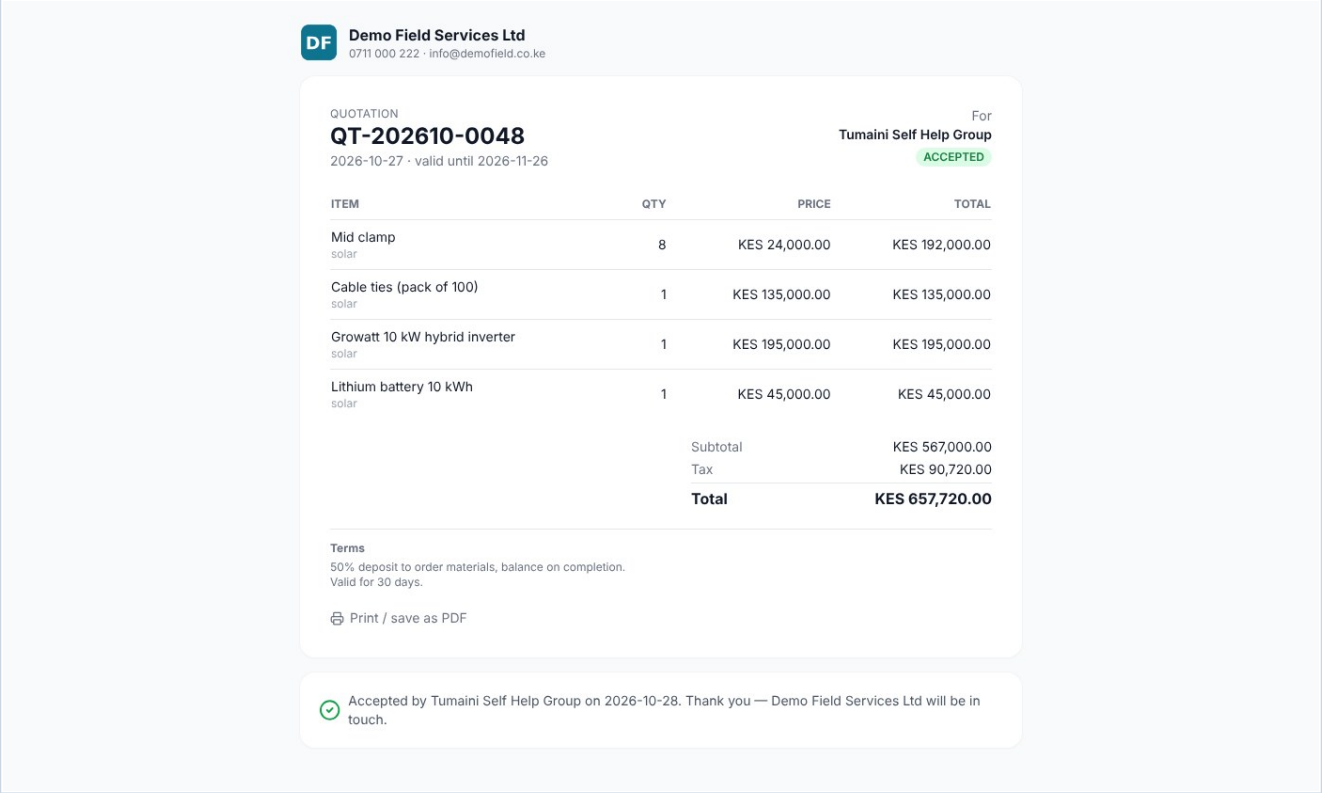



*Faulty items waiting to be returned.*

# 9. Getting paid

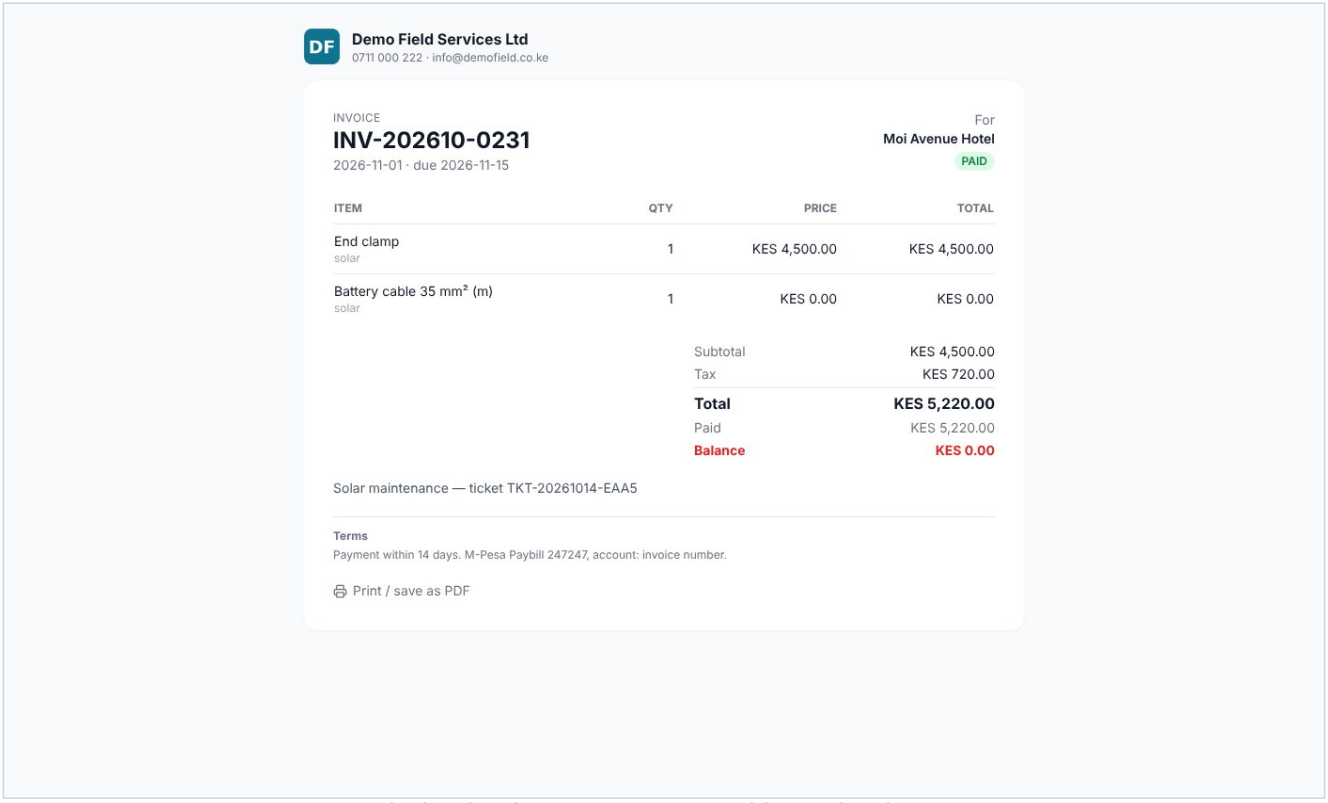
## 9.1 Quotations and invoices

Quotations and invoices are sent to the customer as an **SMS link**. A quotation is made straight from an approved solar design, with your markup on every item. The customer opens the quotation on their phone and **accepts it with their name and signature**; you are told when they open it and when they answer.




*The customer accepts the quotation with a signature.*

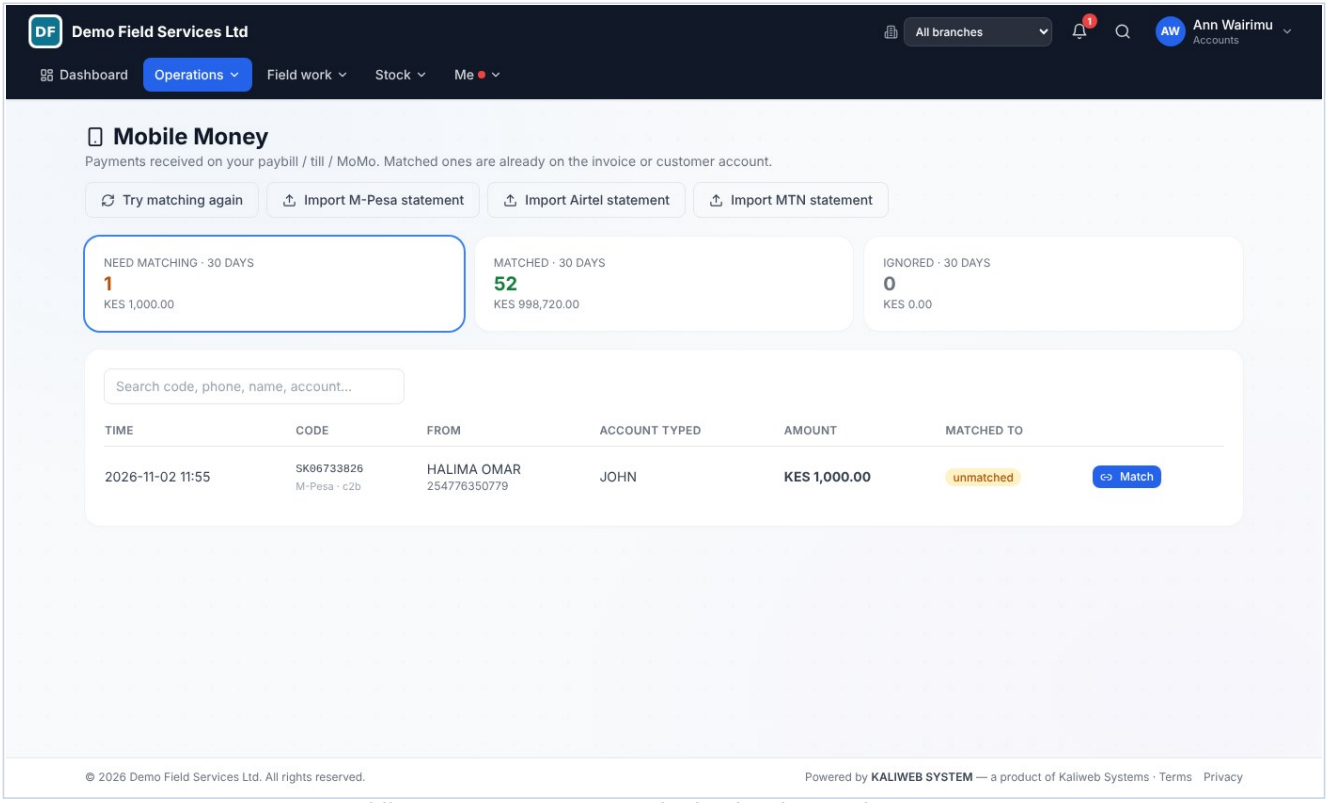
Invoices show *sent, partly paid, paid* or *overdue*. **Request via phone** sends an M-Pesa, MTN or Airtel request to the customer's phone: they enter their PIN and the invoice is marked paid.




*The invoice the customer opens, with "Pay by phone".*

## 9.2 Payments that match themselves

Deposits and balances are paid to your paybill or till with the invoice number. Payments to your paybill or till, and deposits in your bank, are matched to the right invoice or customer by themselves, and the customer receives a thank-you SMS. Anything the system can't match waits for one click under **Accounts → Mobile Money**.

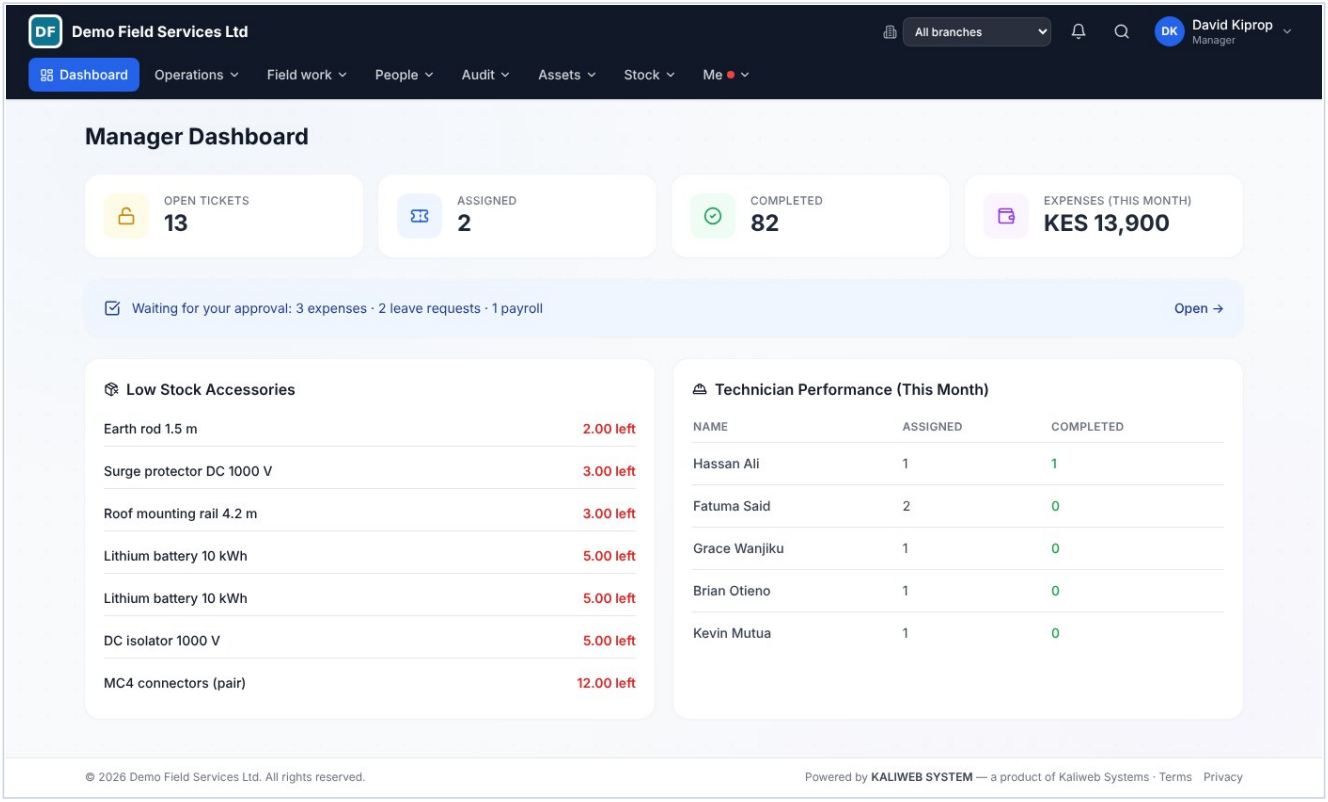



*Mobile money payments matched to invoices and customers.*

Every payment gets an official **receipt** on your letterhead, and expenses, salaries and supplier payments go through approval, so you always see what came in and what went out.

# 10. Knowing how the business is doing

- **Dashboards** for the manager, supervisor and accounts: open jobs, jobs waiting too long, today's money in, overdue invoices.
- **Reports:** revenue, expenses and profit, jobs per technician, time to complete, materials used per job, branch results — exported to Excel.
- **Performance and targets** per technician and team.
- **HR and payroll:** attendance, leave, certificates with reminders before they expire, and the monthly payroll with your country's taxes.




*The manager's dashboard.*

# 11. Questions solar installers ask

| Question | Answer |
|---|---|
| Is the calculator good enough to quote? | It gives the panels, battery bank, inverter and controller sizes and the materials list. A qualified person confirms the design before installing. |
| Can we take a deposit before installation? | Yes. Make a project with milestones (deposit, installation, handover); each one is invoiced in one click. |
| Can the customer see their system? | They see their jobs and invoices in the customer portal; you print the equipment list and certificate for them. |
| Does the money go through Kaliweb? | No. Customers pay your own paybill, till and bank account. Kaliweb never holds your money. |
| Can we have it on our own server? | Yes. We host it for you (with nightly backups and updates done for you) or install it on your own server. |
| Is it in Kenya only? | It works in Kenya, Uganda and Tanzania, with the currency, phone numbers, taxes and mobile money of your country. |

# Next step: see it with your own jobs

Book a free demo: we show you the system with your kind of work, on your phone and laptop, in about 20 minutes.

- **Phone / WhatsApp:** 0111 052 189
- **Email:** info@kaliwebsystem.com
- **Website:** kaliwebsystem.com