

Design Services for Propel Projects

HOW TO: Design Services Orders and Equipment Ordering

Contents

Introduction	2
Domestic Content & FEOC Best Practices	2
Creating a Service Order	3
Completing the Service Order Intake	5
The Plansets Message Center	6
Message Your Designer	6
Upload Documents	6
Statuses & Their Meanings	7
Approving/Rejecting Deliverables	8
On Hold / Request for Information (RFI)	9
Ordering Equipment.....	9
Submitting a Change Request	14
Pre-Shipment Change Requests	14
Post-Shipment Change Requests	16
User Management.....	18
Adding Teammates	18
Disable Update/Notification Emails.....	19

Introduction

After your customer signs their Propel loan documents, you'll receive an email from the Greentech Design Services (GRDS) team with a link to your project in the Greentech Customer Portal. Use this link to access the project and place your design services order.

Here is a high-level overview of the Propel job lifecycle once you receive the GRDS email:

1. **Create a Service Order**
Submit your request for design services through the Greentech Customer Portal.
2. **Plan Set & BOM Creation**
GRDS will develop the Permit Plan Set and Bill of Materials (BOM) using the system details from your Solargraf or Aurora proposal.
Note: Your designer may reach out with clarifying questions, so please be available to keep the process moving.
3. **Review & Approve**
When the plan set and BOM are complete, you'll receive a notification to review and approve the Service Order.
4. **Order Equipment**
Once approved, you can order equipment directly through the Greentech Customer Portal using the BOM automatically generated with your plan set.

Domestic Content & FEOC Best Practices

- All Propel projects must meet FEOC criteria to qualify for the ITC, and in California they must meet the Domestic Content thresholds to qualify for bonus tax credits (or the Domestic Content Adder – DCA)
- Use the *Propel AVL SKUs for DomCon Compliance* guide for specific SKUs to ensure your project has the best chance of being DCA eligible.
- *****IMPORTANT: when you are talking with your Greentech Renewables team, please always let them know this is a Propel order.*****

Creating a Service Order

1. Click on the link to your project in the email from GRDS
2. Click “Create a Service Order” from the dashboard page

Propel Project
Loan ID: 123434

Project Menu

- Dashboard
- Integrations
- Plansets
- Bill of Materials
- Billing

Project: Justice Valadez - PRPL 123434 (GRDS TEST)

Project Dashboard

Project Information

Project Name:
Justice Valadez - PRPL 123434 (GRDS TEST)

Primary Store Name:
--

Installation Address:
1234 Main St, Utopia, CT 12345

[Update](#)

Plansets

No plansets have been started.

[Create a service order](#)

3. Select Residential intake button

New Service Order

Please fill out some basic information for this service order. The type of service order you choose will determine the questions on the following screen(s). All fields with * are required.

Service Order Type (Required)*

- ☐ Residential Intake
- ☐ Commercial and Custom RFQ
- ☐ Additional Services

4. Select relevant services

- *For full Design Services, select the options that are required for your AHJ*
- *For Permit Plan review and validation, select Residential Permit Planset (Unstamped) – you can upload your Permit Planset later in the process*
- *For the Customer PO Number: if this is not marked as required, you do not need to enter anything here. If required, but unknown, you may enter a placeholder PO# to proceed.*

^ **Services**

Choose Service Option*

☐ Residential Permit Planset (Fully Stamped)

☐ Residential Permit Planset (Unstamped)

☐ Residential Wire Diagram

☐ Professional Engineer Review (for existing drawings)

Electrical Engineering Stamp* 

☐ Yes

☐ No

Structural Engineering Stamp* 

☐ Yes

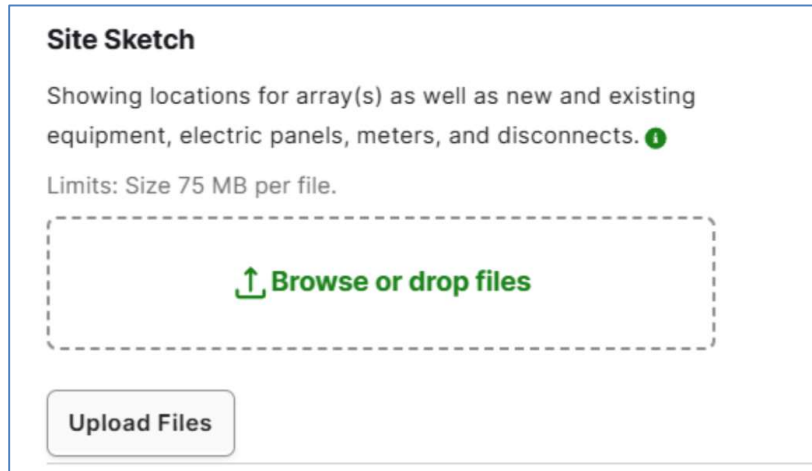
☐ No

Customer PO Number

5. Complete the System Information section and then click Save and Continue

- **NOTES:**
 - From this point your progress is auto-saved
 - Only Enphase batteries are on the AVL for Propel
 - Additions to Existing Systems are not allowed for Propel unless it is a stand-alone second system. Second systems are not allowed in TX.

6. Upload supporting documents (Site Sketch, Sales Proposal, settings you use in your proposal tool, or any other documentation that will help your designer). For Planset Attestation, upload your Planset and Attestation letter).



Site Sketch

Showing locations for array(s) as well as new and existing equipment, electric panels, meters, and disconnects. ⓘ

Limits: Size 75 MB per file.

↑ Browse or drop files

Upload Files

Completing the Service Order Intake

1. Navigate through each section of the Intake Form:
 - A red asterisk [*] indicates a required field. If it's not needed, it may not be applicable to your project.
 - Complete each section to the best of your ability based on the sales proposal your provided – it will be pre-populated by the Design Team so some sections may already be filled out
 - Sections can be saved and returned to later if clarification or investigation is needed



Site Sketch

Showing locations for array(s) as well as new and existing equipment, electric panels, meters, and disconnects.

Max files limit = 99 files

+ UPLOAD FILES

Next section

Back to all sections

SAVE & CONTINUE

SAVE & EXIT

2. Check the agreement boxes for the [Residential Permit Package - Scope of Work \(Recently Updated\)](#) and [Terms & Conditions](#)

3. Click Save and Submit (NOTE: if required fields are missing you will not be able to submit the Service Order)

The Plansets Message Center

This page is where you can upload files and chat with your designer.

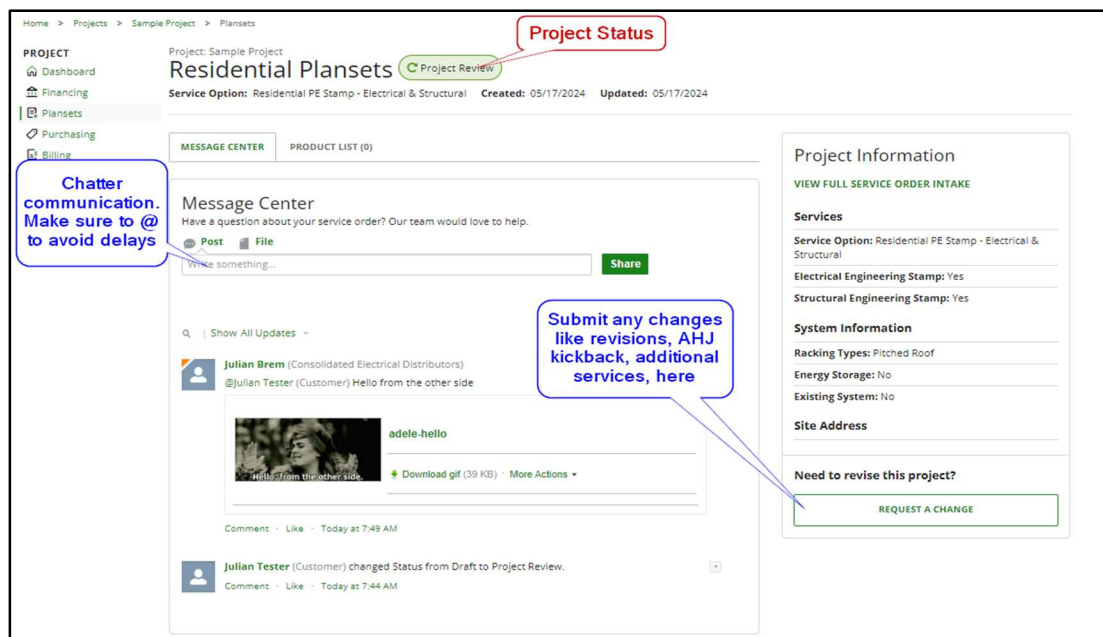
Message Your Designer

Click Post to chat with your designer. Make sure to ALWAYS @ whomever you are trying to reach. E.g. "@John Smith"

Upload Documents

Click on Files to upload documents:

- If you used a design tool other than Solargraf, upload the DXF, Shade Report, and BOM in the Message Center.
- If you are using the Planset Attestation feature: you can upload your Permit Planset if you requested a Planset Review & Validation rather than a full Design. Design Services will create a BOM based on your Planset and you can skip ahead to Equipment Ordering.



Statutes & Their Meanings

Notification Sent means you will receive an update when a project is moved into this status.

GRDS / In progress
Sales Approval Need
Customer Action Item
Inactive

Statutes	Residential	Notification Sent	Notes
Canceled	X	X	
Draft	X		If Project is created, but Service Order not submitted
Request for Information	X	X	More information is required in order to move forward
On Hold	X	X	On hold for any reason
Intake Required	X	X	Reopens intake sections for additions and updates
Project Review	X		Project submitted and being reviewed by GRDS
Redline	X		Deliverables rejected at Prestamp Approval or Deliverables Ready stage
Drafting	X	X	Planset drafting is in progress
Prestamp Approval	X	X	Initial project deliverable has been sent to customer for review and approval before sending to the PE for stamping (only used when EE or SE stamps have been requested)
Send for Stamping	X		Initial project deliverable has been approved and is ready for GRDS to send to the PE for stamping
Stamping	X		When PEs are reviewing and stamping plans
Change Request	X	X	If the customer submits a change request, or we set manually
Deliverables Ready	X	X	Deliverables have been uploaded and are ready for review and approval
Completed			Set after been in "Deliverables Review" for 2 weeks or deliverables were approved

Approving/Rejecting Deliverables

1. When a project is in either Prestamp Approval or Deliverables Ready status, you will receive an email notification and be prompted to review the most recently uploaded files.

The screenshot displays the 'Residential Planset' interface. At the top, it shows the status 'Deliverables Ready' in a yellow badge. Below this, the 'Created' and 'Updated' dates are both '02/03/2026'. The interface is divided into three tabs: 'Messages', 'Products (31)', and 'Project Info'. The 'Messages' tab is active, showing a 'Message Center' with a prompt: 'Have a question about your service order? Our team would love to help.' Below this is a text input field with a 'Post' button and a 'File' icon. A search bar with 'Show All Updates' is also present. Two messages are listed: one from 'Evan Crooker' (Greentech Renewables) changing status to 'Deliverables Ready' at 8:07 AM, and another from 'J. Val' (Customer) changing status from 'Draft' to 'Project Review' at 7:23 AM. On the right side, the 'Planset Documents' section shows 'Version 1' dated '02/03/2026' with two files: 'PropelDemoPDF.pdf' and 'PropelDemoBOM.csv'. Below this is a 'Reviewer' section with a green 'Approve Documents' button and a red 'Reject Documents' button. At the bottom right, a box asks 'Need to revise this project?' with a green 'Request a Change' button.

- **Approve Documents** will move the project forward.
- **Reject Documents** will send the project back to Redline
 - A reason for rejection will be required
 - Any files applicable to the rejection need to be uploaded via the Message Center. Be sure to tag the project's main point of contact.
 - Please be available to discuss the rejection reason with your designer.

The screenshot shows a 'Reject Documents?' dialog box. It contains a text input field with the placeholder text '*please upload any files through the Message Center*'. Below the input field are two buttons: 'SEND RESPONSE' and 'CANCEL'.

On Hold / Request for Information (RFI)

1. In the case that a project is set to and **On Hold** or **Request for Information** status, the project will not move forward unless you take action
2. The reason for the On Hold/RFI will be displayed at the top of the page

Reason for Request for Information:

Missing Photos, Insufficient Equipment Information - Please upload a site survey photos and specify inverter model

Project: November 1

Residential Plansets

Request for Information

Service Option: Residential PE Stamp - Electrical & Structural Created: 11/01/2024 Updated: 11/01/2024

MESSAGE CENTER

PRODUCT LIST (4)

Project Information

3. For the quickest resolution, respond to the prompt by posting in the Message Center, making sure to @ the right recipient.

Ordering Equipment

For Propel projects, you need to use the BOM provided to you by Design Services to generate a Web Order for the equipment used in your Planset.

1. From the Residential Planset page, click on the Products tab
(Pro-Tip: you can always browse to the Planset page from the left-hand column of the Project)

Residential Planset

Completed

Created: 02/03/2026 Updated: 02/03/2026

Messages

Products (31)

Project Info

Summary

Subtotal

\$0.00

Shipping & Tax

Calculated at Checkout

System Size

Total Output

0 Kilowatts (kW)

Product	Quantity
Item # THIS WEB ORDER IS A CONCERT PROPEL PROJECT	1
Item # THE LOAN ID IS 736956	1
Item # DOMESTIC CONTENT IS REQUIRED	1

2. Scroll to the bottom of the page and click one of the following:
 - If you have no edits to the BOM, click **Proceed to Checkout**.
 - If you would like to generate your BOM and make edits, click **Add to Project Bill of Materials**.

*****NOTE: if you and your Sales Rep decide on any changes to the BOM or Work Order, any changes to AVL equipment (modules, inverters, battery, rail & structural fasteners) MUST be routed back through Design Services before your order can be fulfilled. Any non-AVL materials may be edited*****

SnapNrack Sealing Washer Lug 4.8 Stainless Steel, 242-02168		34
Mfr: SNAPNRACK Catalog #: 242-02168 Item #: SNRAC 242-02168		
	SnapNrack Domestic OmniLug, 242-10034-USA	20
Mfr: SNAPNRACK Catalog #: 242-10034-USA Item #: SNRAC 242-10034-USA		
Proceed to Checkout		Add to Project Bill of Materials

3. To edit the Bill of Materials, click on **View Bill of Materials** in the pop-up window that appears. This will take you to the Bill of Materials, where you can add, remove, or adjust the quantity of the materials on your BOM.
When you have finished editing, click **Proceed to Cart**.

✓ **Added to Bill of Materials**

You have added 30 items to Bill of Materials.

[View Bill of Materials](#) [Continue](#)

NOTE: you may edit any material below the line highlighted in yellow in the screenshot below:

Products	Quantity	Ext. Price
☐ Move Item Item # THIS WEB ORDER IS A CONCERT PROPEL PROJECT	- 1 + Remove	TBD
☐ Move Item Item # THE CUSTOMER ID IS 758623	- 1 + Remove	TBD
☐ Move Item Item # DOMESTIC CONTENT IS REQUIRED	- 1 + Remove	TBD
☐ Move Item Qcells 430W 108 Half-Cell N-Type TOPCon BLK/BLK Solar Panel, Q.TRON BLK M-Q2.C+ 430 Mfr: QCELLS Catalog #: Q-TRON BLK M-Q2 C+ 430 Item #: QCELL Q-TRON BLK M-Q2 C+ 430	- 12 + Remove	
☐ Move Item Enphase Domestic IQ8HC Microinverter 384Va Peak w/MC4, IQ8HC-72-M-DOM-US Mfr: ENPHASE ENERGY Catalog #: IQ8HC-72-M-DOM-US Item #: ENP IQ8HC-72-M-DOM-US	- 12 + Remove	
☐ Move Item IronRidge Domestic Airc Rail A1 170' - Black, AE-A1-170B-US Mfr: IRONRIDGE Catalog #: AE-A1-170B-US Item #: IRIDG AE-A1-170B-US	- 8 + Remove	
☐ Move Item IronRidge Domestic Airc Tie A1 Bonded Splice, AE-A1TIE-01-M1-US Mfr: IRONRIDGE Catalog #: AE-A1TIE-01-M1-US Item #: IRIDG AE-A1TIE-01-M1-US	- 4 + Remove	
☐ Move Item IronRidge Domestic Airc Lock Mid 30-40mm - Black, AE-USMID-01-B1-US Mfr: IRONRIDGE Catalog #: AE-USMID-01-B1-US Item #: IRIDG AE-USMID-01-B1-US	- 20 + Remove	
☐ Move Item IronRidge Domestic Airc Lock End 30-40mm - Black, AE-END-01-B1-US Mfr: IRONRIDGE Catalog #: AE-END-01-B1-US Item #: IRIDG AE-END-01-B1-US	- 8 + Remove	
☐ Move Item IronRidge Domestic Airc MLPE Mount, AE-MLPE-01-M1-US Mfr: IRONRIDGE Catalog #: AE-MLPE-01-M1-US Item #: IRIDG AE-MLPE-01-M1-US	- 12 + Remove	
☐ Move Item Item # DO NOT EDIT ANY PARTS ABOVE THIS LINE WITHOUT GRDS	- 1 + Remove	TBD
☐ Move Item Item # *****	- 1 + Remove	TBD
☐ Move Item Item # PC MAY EDIT LINES BELOW ONLY	- 1 + Remove	TBD

4. Select payment method
5. Complete the Shipping Options – **you must select CED Delivery**

Shipping Options

Select a shipping option (required)*

☒ CED Delivery

☐ Will Call

Date order is needed (required)*

MM/DD/YYYY

02/04/2026 

[Go to Step 2 - Address](#)

- Enter the Job Site address as the Shipping Address – **On Site Delivery is required for Propel jobs**

Checkout - Address

Shipping Address

[Saved Addresses](#)

Street Address Line 1 (required)*

1234 Main St

[Add Address Line 2](#)

City (required)*

Utopia

State/Province (required)*

Connecticut 

Postal or Zip Code (required)*

12345

[Save to Address Book](#)

- Enter a contact name and phone number for your company

Contact Information

[Saved Contacts](#)

Name (required)*

Company Contact

Phone Number (required)*

1231231234

8. Checkout - Payment

- PO Number is not required
- Copy & Paste and Project name (found on the right side of the page)

Checkout - Payment

Payment will be made on account.

Additional Information

PO Number

Job Name

Project Information

Project John Smith - PRPL 123434
Address 1234 Main St
Utopia, CT 12345

9. Review & Submit Order

Checkout - Review and Submit

Shipping Options

Shipping Method:
CED Delivery

Date Required:
2/4/2026

[Edit options](#)

Shipping Address

1234 Main St Utopia, CT 12345

Contact Information:
Company Contact
1231231234

[Edit address](#)

Project Information

Project John Smith - PRPL 123434
Address 1234 Main St
Utopia, CT 12345

CED Standard Terms and Conditions apply to this order. Please review before purchasing.

[Submit Order](#)

*****IMPORTANT: when you are talking with your Greentech Renewables team, please always let them know this is a Propel order.*****

Submitting a Change Request

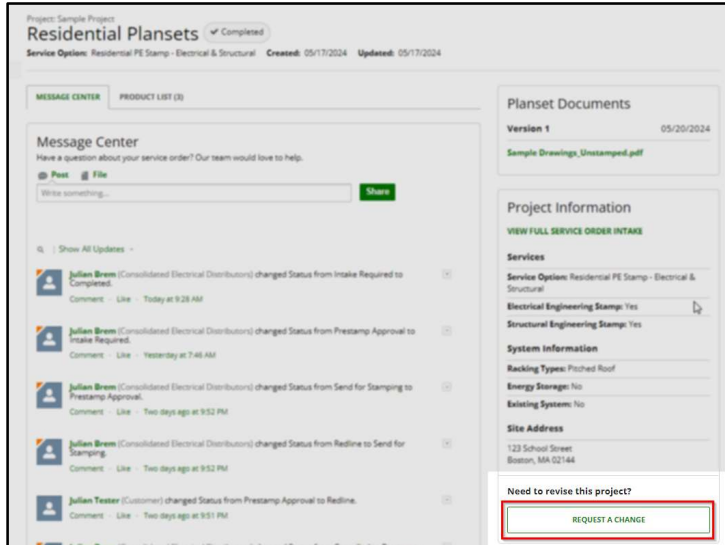
Pre-Shipment Change Requests

A change request is a catch-all term for additional requests or changes needed on the project. A revision, AHJ kickback, additional services, etc. are all cause for a Change Request. This process below applies to any changes you need to make BEFORE equipment has shipped.

IMPORTANT: Please refer to the [Post-Shipment Change Requests](#) process if you need to make changes AFTER equipment has shipped.

*****NOTE: if you and your Sales Rep decide on any changes to the BOM or Work Order, any changes to AVL equipment (modules, inverters, battery, rail & structural fasteners) MUST be routed back through Design Services before your order can be fulfilled. Any non-AVL materials may be edited*****

1. To submit a change request, click the "Request a Change" button under the Planset Documents section



2. Complete the change request by describing the reason for the change.

Project: Sample Project

Request a Change

Change Request Reason* required

Description*

Permit Number

☐ Correction Response Letter Required

☐ Restamp(s) Required

☐ Revision

☐ Revision Clouds Required

Optional, ignore if not applicable

Upload Supporting Files for Change Request

[Choose File](#) No file chosen

[SUMMIT CHANGE REQUEST](#)

3. After you submit the Change Request, the following steps will happen:
 - Project status will update to Change Request
 - A new tab will appear in the Residential Plansets Message Center where you can monitor the status of the change request
 - Change request comments will be posted in the Message Center

Project: Sample Project

Residential Plansets

[Change Request](#)

Service Option: Residential PE Stamp - Electrical & Structural Created: 05/17/2024 Updated: 05/17/2024

MESSAGE CENTER PRODUCT LIST (3) **CHANGE REQUESTS (1)**

Change Requests (1)

Case Number	Change Request Reason	Case Status	Date/Time Opened
00002183	Material Shortage	New	05/21/2024 9:42 AM PDT

4. When your updated Planset and BOM are complete, you can proceed with placing your order.

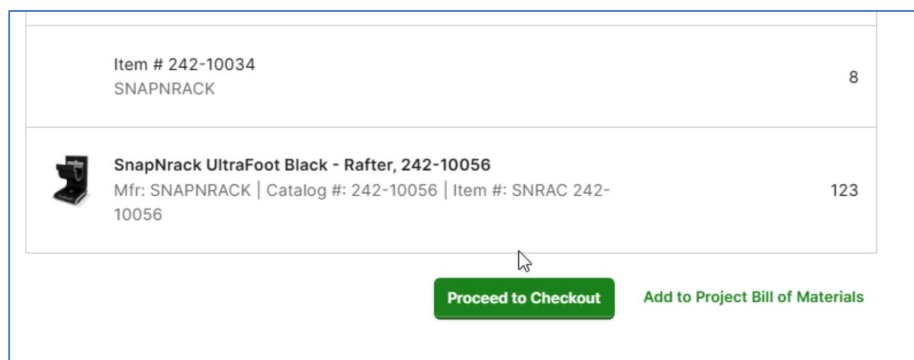
Post-Shipment Change Requests

*****NOTE: if you and your Sales Rep decide on any changes to the BOM or Work Order, any changes to AVL equipment (modules, inverters, battery, rail & structural fasteners) MUST be routed back through Design Services before your order can be fulfilled. Any non-AVL materials may be edited*****

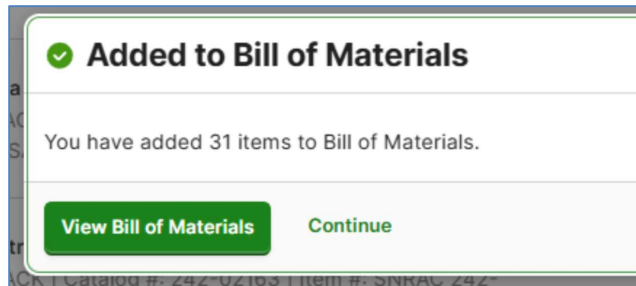
For Propel projects it is mandatory that the equipment you ordered can be tracked to the homeowner's job site. This is called the **Chain of Custody** and it allows the lender to qualify for the tax credit, which is the foundation of the Propel finance product.

The following instructions will help you make changes after equipment has been shipped without breaking the Chain of Custody.

1. To submit a change request, follow the instructions for a Pre-Shipment Change Request.
2. Your designer will work with you to create a new Planset and BOM based on the changes you need to make.
3. If your new BOM includes additional equipment, it will **also include all the equipment** from your original order. Because you don't want to order duplicate equipment, you're going to need to do a little editing. Before you place the Web Order for the additional equipment, be sure to carefully remove any equipment that has already shipped.
4.
 - How to Order: Scroll to the bottom of the page and this time, click **Add to Project Bill of Materials** (remember, when you placed the original order, you clicked **Proceed to Checkout**)
 -



- Click View Bill of Materials in the pop-up window:



- This will take you to the Bill of Materials, where you can remove all of the equipment you have already received.
-

Project: Evan - Test 44 (GRDS Test)

Bill of Materials

Add products from the following: (1) Plansets (2) [Product List](#) (3) [Upload Products](#) (4) Search below

Summary Subtotal \$0.00 Shipping & Tax Calculated at Checkout ✓ Proceed to Cart	System Size Total Output 0 Kilowatts (kW)
---	---

Q Search for name or part number

Showing 1 item(s) (Select items for bulk actions)

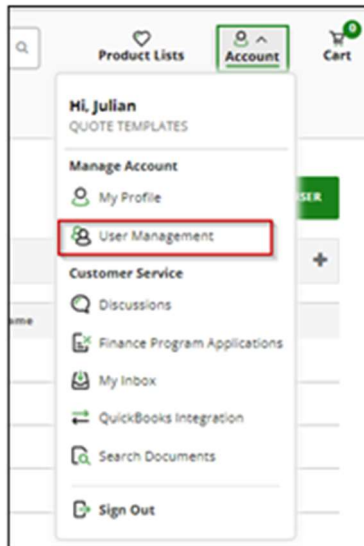
☐ Products	Quantity	Ext. Price
☐ Qcell 410W 132 Half-Cell 1000V BLK/BLK Solar Panel, Q.PEAK DUO BLK ML-G10.C+ 410 Mfr: QCELLS Catalog #: Q.PEAK DUO BLK ML-G10.C+ 410 Item #: QCELL Q.PEAK DUO BLK ML-G10.C+ 410 Move Item	- 1 + Remove	

5. If your new BOM has less equipment than your original order, you can return the extra equipment for a credit.
6. Place your Web Order for the additional equipment. This will generate a shipment, and a POD to maintain the Chain of Custody for the new equipment.
7. Meanwhile, your designer will update the Concert portal with the new Planset and the new, complete BOM including all shipped equipment.

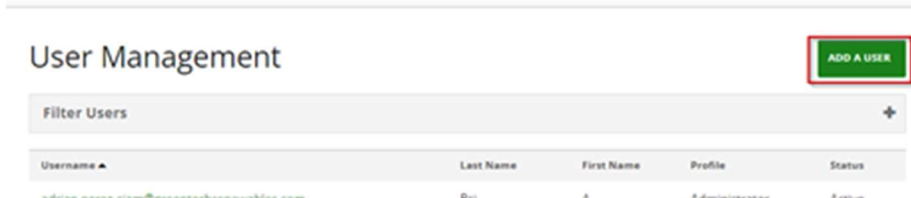
User Management

Adding Teammates

1. Click Account and select User Management



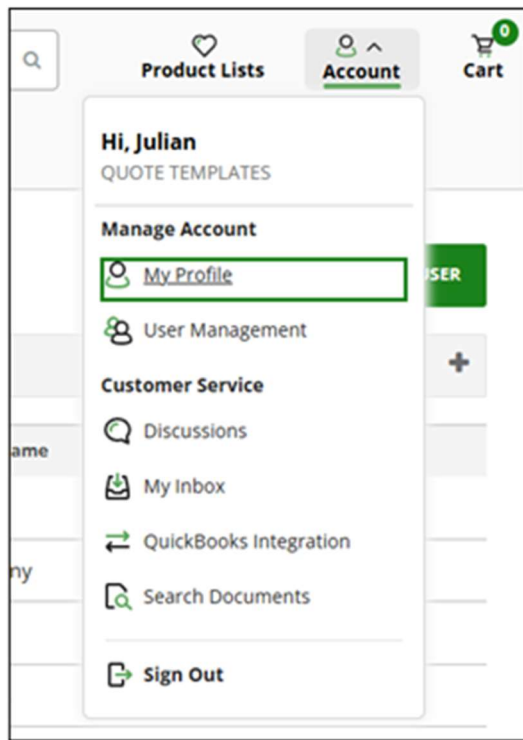
2. Click Add User



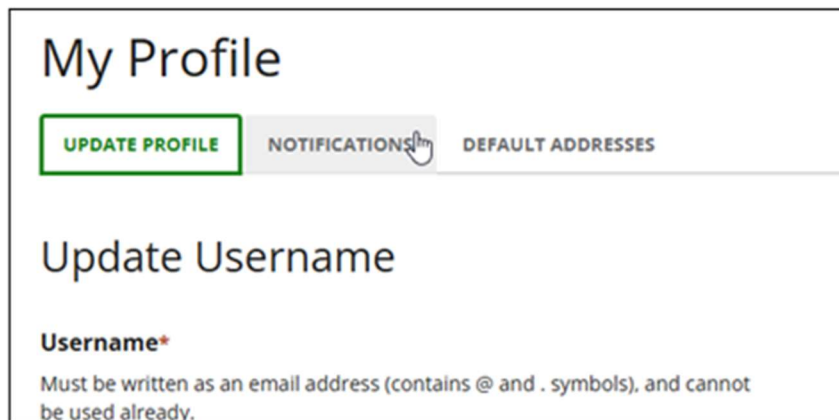
3. Select the right Profile
 - Administrators may create and manage other users
 - Standard users have all other permissions of administrators
 - Limited users have permissions as configured below
4. Welcome Emails to new users can take 5-15 minutes

Disable Update/Notification Emails

1. Click “Account” and select “My Profile”



2. Head to the NOTIFICATIONS tab



3. Scroll towards the bottom, and uncheck “Planset Updates”



4. Select “Update Preferences” at the very bottom of the page

SMS messages will be sent to the phone number on My Profile

UPDATE PREFERENCES

CANCEL