

# Solar Installation Quote Accuracy Checklist

## Pre-Approval Validation Tool for Residential & Commercial Projects

*An Arrivy Resource for Solar Installation Teams*

---

**Company Name:**

**Project Name / Client Account:**

**Property Address:**

**Utility Provider:**

**System Type:** (Roof Mount / Ground Mount / Commercial Array)

**Proposed System Size (kW):**

**Quote Version:**

**Estimator Name:**

**Date:**

Use this checklist before approving any solar installation quote for execution.

---

## 1. Site Validation

- Roof pitch and orientation confirmed on-site
- Usable roof square footage measured
- Obstructions documented (vents, chimneys, skylights, HVAC units)
- Shading impact assessed (seasonal consideration included)
- Structural condition reviewed (decking, rafters, load tolerance)

- Attachment method validated
- Access, fall protection, and staging constraints documented

## 2. System Sizing & Production Modeling

- 12 months of utility usage reviewed (kWh)
- Target offset percentage defined (e.g., 90–110%)
- Final system size (kW DC) calculated from validated data
- Module wattage selected
- Inverter type selected (string/microinverter/hybrid)
- DC-to-AC ratio reviewed
- Production assumptions documented (tilt, azimuth, shading loss)
- Fire setback and layout compliance confirmed

## 3. Electrical Scope Validation

- Main service panel capacity verified
- Breaker space confirmed
- Load calculation completed (if required)
- Main panel upgrade assessed (if applicable)
- Grounding and bonding considerations reviewed
- Conduit routing and wiring path defined

## 4. Labor Planning & Installation Scope

- Crew size defined
- Installation duration estimated
- Task sequencing reviewed
- Structural reinforcement labor accounted for
- Electrical upgrade labor accounted for
- Specialized labor identified (commercial/high-voltage/engineering)

## 5. Permits & Utility Interconnection

- AHJ permit requirements reviewed
- Required engineering documentation identified

- Inspection sequence mapped
- Utility interconnection steps confirmed
- Transformer or utility upgrade risks evaluated
- Estimated Permission-to-Operate (PTO) timeline defined

## 6. Financial & Documentation Review

- Equipment costs itemized
- Labor costs itemized
- Permit and inspection fees included
- Financing fees disclosed (if applicable)
- Incentive eligibility documented (ITC, local rebates)
- Quote expiration date defined
- Change-order conditions documented

## Final Validation Before Approval

- Labor hours align with crew capacity
  - Equipment availability confirmed
  - Design documents match the quote scope
  - All attachments included
  - Internal technical review completed
  - Final approval documented
- 

## Approval Sign-Off

Estimator Name:

Signature / Date:

Operations Review (if required):

Signature / Date:

Approved for Scheduling:

Signature / Date:

---

## About Arrivy

Arrivy helps solar installation teams convert validated quotes into scheduled jobs without manual reconstruction.

This checklist can be used as a printable pre-approval audit tool or implemented digitally within Arrivy to:

- Convert checklist items into structured digital fields
- Attach site photos and documentation directly to the quote
- Lock the approved scope before scheduling
- Automatically convert approved quotes into dispatch-ready jobs
- Maintain a complete revision and approval history

**For workflow customization, visit [arrivy.com](https://arrivy.com) to explore structured quoting and scheduling tools.**