

Use for information gathering only. Final design and electrical work require qualified professionals.

1. CUSTOMER AND PROJECT DETAILS

Customer / Company

Survey date

Prepared by

Installation address

Phone / Email

Distribution utility

Account reference

2. ELECTRICITY BILL AND CONSUMPTION

Typical monthly bill

Actual monthly kWh

Electricity rate / kWh

Bills reviewed (months)

Seasonal/highest bill notes

3. CUSTOMER GOALS

Reduce daytime electricity bill

Backup during outages

Off-grid operation

Net-metering / export

Future load expansion

Other objective

Target budget range

Desired backup hours

Target installation date

Customer priorities and expectations

Record realistic wattage, quantity and daily use. Mark only loads requested for backup.

Appliance / Load	W	Qty	Hours/day	Peak/Surge	Backup?	Notes
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LOAD SUMMARY		
Estimated simultaneous peak (W)	Estimated daily energy (Wh)	Largest surge load / notes

Loads excluded from backup / load-management plan

1. ROOF AND ARRAY AREA

Metal roof	Tile	Concrete	Ground mount	Other
Roof age and condition		Usable array area		Roof pitch / access
Orientation / azimuth		Shading sources and times		Wind / corrosion environment

2. ELECTRICAL SERVICE AND EQUIPMENT LOCATION

Service voltage / phase	Main breaker / service rating	Panel condition / spaces
Grounding system observed	Generator / ATS present	Backup-load panel feasible
Proposed inverter location		Proposed battery location
PV / battery / AC cable route		Wi-Fi / monitoring availability

3. SITE RISKS AND REQUIRED ACTIONS

Roof repair/structural review	Panel/service upgrade	Grounding correction
Flood/water exposure	Difficult roof/fall access	Utility/permit coordination
Hazards, corrective actions and professional referrals		

1. PRELIMINARY SYSTEM DIRECTION

Off-grid	Hybrid/backup	Grid-tied/net-metered	Zero export
Suggested DC bus: 12/24/48V	Preliminary PV size	Inverter direction	Battery direction

Preliminary recommendation and assumptions

2. REQUIRED DOCUMENTS / PHOTOS

Electric bills	Appliance list
Roof overview	Roof attachment points
Main panel and breakers	Utility meter/service entrance
Grounding system	Equipment locations
Cable routes	Customer authorization

3. SIGN-OFF AND NEXT ACTION

Next action / responsible person	Follow-up date and contact method
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Customer acknowledgement / name

Surveyor / installer name

TURN THIS SURVEY INTO A SOLAR RECOMMENDATION

Use the ADWORKS Offline Solar Calculator for bill, kWh or appliance-based sizing.

adworkscalculator.gumroad.com//adworks-solar-calculator