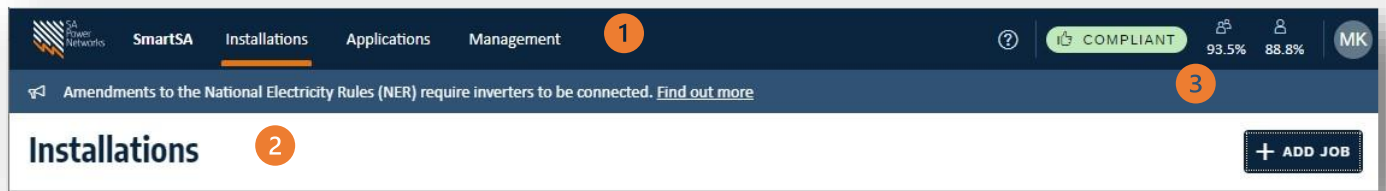


Understanding the SmartSA top menu

Formally you may have known of SmartApply and SmartInstall. These two apps have now been merged, and the new format is known as SmartSA. If you have access to both apps, you will see “Installations” and “Applications” in the top menu bar of SmartSA. Using the old links will still work and bring you into SmartSA.



- 1 The sites you have worked on or that have been shared with you will be displayed on this page. The top menu bar shows you which dashboard is currently open. In this example the user has opened the Installations page. You can swap between Installations and Applications if you have access to both.
- 2 The Installations dashboard is displayed below this heading. To the right of this heading, you can click **+ ADD JOB** to close out a new installation
- 3 Compliance statistics and information will be displayed on the right-hand side of the top menu bar. In this example the user is compliant, they belong to a company, so the company compliance percentage is displayed as **93.5%** alongside the user’s personal compliance percentage **88.8%**.
Both the user and company compliance percentage should be at 100%

Understanding the Installations Dashboard

The screenshot shows the 'Installations' dashboard. At the top right is a '+ ADD JOB' button (2). Below it is a search bar (1) and a 'FILTERS' button with a funnel icon (3). The main table has columns for Address, NMI, EG ID, Site size, Work status, and Actions. The first two rows show 'COMMISSIONED' status (5) with 'VIEW' buttons (6). The last two rows show 'TO DO' status with 'CLOSE OUT' buttons (7). Each row also has a three-dot menu icon (7).

Address	NMI	EG ID	Site size	Work status	Actions
[REDACTED]	[REDACTED]	EG1193888	8.68 KVA	✓ COMMISSIONED	VIEW
[REDACTED]	[REDACTED]	EG1193888	8.68 KVA	✓ COMMISSIONED	VIEW
[REDACTED]	[REDACTED]	EG1193878	0 KVA	🔍 TO DO	CLOSE OUT
[REDACTED]	[REDACTED]	EG1193839	0 KVA	🔍 TO DO	CLOSE OUT

- 1 The search box allows you to quickly locate a site by NMI, application number or address. Note that you can only view sites you have already retrieved through **+ ADD JOB** or that has been shared with you
- 2 The **+ ADD JOB** button allows you to retrieve a site on application ID, address, or NMI, and start the close out process
- 3 The funnel icon is the advanced search function which gives you the ability to tailor searches for applications
- 4 Each row displays identifying information about the site and application
- 5 The status of each of the sites is displayed for a quick view of where each is up to and aligns with the next column
- 6 Use the **CLOSE OUT** button to start closing out a site, or the **VIEW** button to review closed out sites
- 7 The **⋮** allows you to archive a site, this effectively hides it from your dashboard. You can. You can use **+ ADD JOB** to get it back again if needed