

# Validation Guide (Proposals)

## WIKI OVERVIEW

- **Wiki Purpose:** The objective is to meticulously review and either approve or reject the Validation Guide (Proposals) by verifying its alignment with the contract, ensuring adherence to the same consumptions as the CFE bill, verifying absence of extra costs or their accurate inclusion, and ensuring eligibility for IDB subscriptions by disqualifying proposals with a 100% added estimated consumption.
- **Wiki Owner:** Joseph Canaan
- **Validity:** n/a

## Approval Requirements for the Proposal

Follow the [Underwriting Criteria \(Mainstream Valid Rules\)](#)

## Process to review and approve/reject the Validation Guide (Proposals)

1. Go to "Proposals" and tag the proposal signed as "Contract"
2. Approve the proposal as "Proposal PPXXXXX" if:
  1. The proposal is valid
  2. The proposal must have the same consumptions as the CFE bill. A 100% added estimated consumption is not eligible for IDB subscriptions
  3. Same in the contract as in the platform
  4. If there are extra costs included, verify that are added correctly
  5. 

The project won't be approved if the extra cost for Planeación is not included in the contract
  6. Energy sign in clause 5 is equal of to Design (100% in contract). Only in financial lease contract the generation in the contract is 85% of the design
  7. Verify the type of inverters (IQ+ 2 and 3 F) (APS (Hoymiles) for 1F)
  8. The number of panels is correct
  9. IRR is greater than 13% for IDB or greater than 15% for MGM. [Dashboard](#) to check

## CSI Approval Checklist

**Objective:** This document seeks to ensure CSI analysts the success in CSI proposals approval.

**Summary:** CSI analyst is seeking 100% of proposals created, regardless of the type of proposal requested (subscription, prepayment, or financial), and gets approved by the exec team by implementing a checklist in order to diminish the errors in the template filled manually.

## Subscription CSI template checklist

1. CFE temperature zone, CFE geo region, postal code, and number of phases matches with the most recent CFE bill in OPS
2. Consumption matches with the one from eGauge/estimator
3. The number of actual panels and their wattage matches with the one in the approved commissioning
4. The number of old panels and their wattage matches with the one in the current project design

5. The number of new panels and their wattage matches with the one in the newly approved project design
  6. Make sure that the MXN/mo/kW should be similar in both cells (for the new and old system size), and a special not for prepayments, where we will usually look for a lower price over time
  7. The percentage for kWh expected vs preview is >98%
  8. The percentage for yield expected vs preview is >95%
  9. The original contract date matches with the one in installations “billing turned on by interconnection approval”
  10. The % of solar has to be <100%
  11. The column “Suggested \$ from preview with Hacky Yield and panels equivalent” is filled with the data given by the preview using the hacky yield
  12. The savings percentage in “%Savings 1st out DAC” is at least 20%
- The column “Fair \$ and Hacky yield” is filled with the data given by the preview using the hacky yield and new total price
1. Make sure the “Panels (550W equivalent)” and the “Hacky yield Jonah needs to enter in RealSoftware” is taking into account the correct and most recent panels wattage in their formulas
  2. Check that the number “Panels (550 equivalent)” matches with the number from the preview
  3. Be sure to use “Suggested \$ from preview tool” to price the new proposal at the moment to request the proposal

### Prepayment CSI template checklist

1. As we don't charge extra for the annual escalator for prepayment proposals, we'll check the same data for consumptions, system size, and pricing that “Subscription CSI template checklist” but changing the extra panels price for the one given by setting ONLY the number of panels to add in the proposal preview.
2. Be sure to use “Fair \$ and Hacky yield” to price the new proposal at the moment to request the proposal
3. For pricing the CSI on the template use the “Fair \$ and Hacky yield” since this is the price the customer has paid + the price for the system increase

### Financial CSI template checklist

1. As we don't charge extra for the annual escalator for financial proposals, we'll check the same data for consumption and system size that “Subscription CSI template checklist”
2. Request a preview in the “[Financial lease preview](#)” based on the number of panels needed
3. Once the customer chooses the contract length and monthly lease request the contract with that info to the exec team.

## Installers Led/Risk based proposal approval

### Scope:

- **In scope:** T1, FutureDAC, PDBT, DAC <25 kW
  - **Out of scope:** GDMT and Systems >25 kW

### Process as of 26/01/2023 (to be revised in 10/02/2023):

1. Whenever Jonah creates custom proposals for these installer led projects, we can assume it fulfils our IRR criteria of >15%.
2. In order to verify if the lead corresponds to an Installer led sales project, check this [list](#).
3. If sales requires to modifying an already created custom proposal by Jonah then:
  - This can only apply if the extra cost is paid by the client at maximum 12 months financed.

- If a change in the proposal is required such as extra cost modification, extra cost financing or yield change, we can copy the same inputs (monthly fee) in to create a modified proposal.

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