

Freedom Forever SOP (standard operating procedure):

Lead Processing S.O.P in Freedom Portal:

_ Lead Creation in Leads Dashboard:

- **Navigate to the Leads Dashboard in Freedom Portal.**
- **Add lead details into the dashboard.**

_ Proposal Setup in Aurora:

- **Click on the lead and then select Edit Proposal in the Aurora Proposals section.**
- **Click the Home icon, then Request Expert Model.**

_ Usage & Rate Input

- **Go to the Usage tab to enter:**
- **Customer's usage data.**
- **Pre-solar and post-solar rate information.**

_ Design Setup

- **Once the model is complete:**
- **Click on the Panel tab and select QCell 410.**
- **Use the Place button to position the panels on the design**

_ Inverter Selection

- **In the Inverter tab (bottom section), choose the appropriate inverter to match the battery type:**
- **SolarEdge inverter for SolarEdge battery.**
- **Tesla inverter for Tesla battery**

_ Financing Setup

- **Go to the Finance tab:**
- **Select EnFin as the financing option.**
- **Choose the Escalation Rate.**
- **Click on the Pencil icon to lock in the monthly price and EPC**

_ Finalize and Apply

- **Review all the project.**
- **If everything is correct, click Apply Now to proceed with credit check.**
- **Once credit is approved create the IL DISCLOSURE**
UPDATE YOU CAN NOW CALL FREEDOM TO CREATE YOUR ABP FORM.
1-951-528-2106

_Once the IL Disclosure is done and signed.

- Click exit then crm... that will convert into a project.
- Go Back to freedoms page, click on customer and the project should be at the bottom, if not inside the proposal tab it should say convert to project.
- Once converted you can send out all docs and upload the utility bill if ameron then homeowner insurance needed too.
- You must counter sign the IL disclosure and once all docs are signed then you can schedule the sight survey by clicking submit project.

**IF YOU WANT TO MANUALLY CREATE THE IL DISCLOSURE FOLLOW THESE STEPS
IF YOU CALLED IN TO HAVE FREEDOM SEND IT OUT SKIP TO THE SECTION
UPLOAD IL ABP PORTAL.**

SOP for Illinois Disclosure Form Submission:

_ Excel & Device Requirements

- This process requires Microsoft Excel:

_ Download Template in Freedom Portal

- Sales Resource Center > Document Library > Utility and Incentive Documents > IL > ABP Incentive.
- Click on ABP Disclosure Form Tool to download the Excel template.

_ Complete Form in Excel

- Open the downloaded template in Microsoft Excel.
- Fill out the form with exact details from the EnFin PPA Form:
- Ensure every letter and number matches 100% correctly.

_ Export to CSV

- Once complete, go to the EnFin PPA CSV Export tab at the bottom.
- Click File > Export, and Download as CSV format.

ONCE IL DISCLOSURE IS SENT AND SIGNED....

Upload to Illinois ABP Portal

- Go to portal.illinoisabp.com and sign in:
- Username: derekvecchione@boundlessinc.com
- Password: Freedomxboundless2025!
- Navigate to:
- Vendor > Disclosure Forms > Upload from Template.
- In Distributed Generation - Power Purchase Agreement section:
- Select your CSV export file and click Import.

_ Request Customer eSignature

- After importing, return to Home, select EnFin Corp, and click View Disclosure Forms.
- Locate the customer's form, click the three dots on the right, and choose Obtain Signature > Request eSignature.
- Wait for the signature to be completed; the status will show as Completed once signed.

_ Download and Upload Final PDF

- When the signature status shows Completed, click the three dots again and select Download PDF Copy.
- Upload this PDF into the Freedom Project.