

Energy Efficiency Project Invoice Guidelines



The **sample energy efficiency project invoice template form** is a guide to help make sure current California Public Utilities Commission (CPUC) requirements are met after your project has been installed to qualify for a Utility rebate or incentive. You have the option of using your invoice format in lieu of the sample form provided; however, all invoices must contain the following information to be processed for payment:

Standard information to be included on invoices for ALL programs:

- Trade Professional Name
- Trade Professional Address
- Trade Professional Contact Info
- Invoice Number
- Invoice Date
- Payment Terms
- Installation Address
- Bill To Customer Name
- Bill to Customer Address
- SDG&E® Account Name
- Installed Equipment Description
- Manufacturer Name & Model #
- Installed Equipment Quantity
- Unit Price of Installed Equipment
- Total Cost
- Shipping & Handling
- Tax
- Trade Pro Signature
- Customer Signature

For Rebate Program measures, please also include:

- Manufacturers' Specification sheets
- Rebate Reservation Number (if applicable)
- Product Code
- Labor (optional)

For Incentive Program measures, please also include:

- Revised Manufacturers' Specification sheets (if installed equipment is different from original submission)
- Incentive Project Number
- Labor

For Technology Incentive Program measures, please also include:

- Manufacturers' Specification sheets
- Incentive Project Number
- Labor

For 3rd Party Program measures, please also include:

- Program Name
- Cost By Program

It is recommended this form be completed and submitted to SDG&E when your project has been installed per the terms and conditions of the SDG&E Energy Efficiency Program.

» Features:

- Universal use template for individual or multiple SDG&E Energy Efficiency Programs including Energy Efficiency Business Rebates, Energy Efficiency Business Incentives, On-Bill Financing and Technology Incentives.
- Template formatting indicates areas which may not need to be completed when submitting for one Utility Energy Efficiency Program. (These template areas are indicated with "if applicable" or referenced in the "Note" section at the bottom of the template).

Note: SDG&E will accept the Trade Professional / Customer project invoices when the same information is provided. The template is a suggested guide to facilitate successful payment processing.

Benefits:

- Correctly completing the Invoice Template or modifying your company's template to include all of the required fields will help expedite payment processing.
- Using the universal invoice template provides the ability to use one project invoice for multiple SDG&E Energy Efficiency Programs, eliminating the need to submit additional information or requests for modified project invoices. This will save you time while addressing CPUC Utility processing requirements.

How to complete the invoice form:

The fields in the Sample Invoice Template (xls) are editable. Complete or provide all fields under the respective Utility Program(s).

Trade Professional (Trade Pro)

- **"Trade Professional" or "Trade Pro"** is the SDG&E Energy Efficiency Program Application "Project Sponsor" or the company managing the Utility Program - incentive/rebate application administration on behalf of the customer.
- **"Trade Pro Address" "Phone" and "Email"** should match the information provided on the Utility Program application.

Invoice

- "Trade Pro Invoice number should be determined by "Trade Professional" (or initial Utility Program applicant or "Sponsor") and should be considered a reference number for all future submittals related to project pricing.
- **"Invoice Date"** determined by "Trade Professional" (initial Utility Program applicant or "Sponsor") after project installation is completed.
- **"Payment Terms"** are the payment terms determined by "Trade Professional" (initial Utility Program applicant or "Sponsor") which "Customer" is being invoiced for payment. (Example payment terms "Net 30 Days")

Installation address:

- **"Customer Name"** - SDG&E Customer Name of Record at the energy efficiency project installation address.
- **"Installation Site Address"** - The address where the Energy Efficiency Project installation occurred.

Bill to

- "Customer Name," Address etc. is the Customer / Company name and address who is paying for the project installation. This Customer information may be different from the installation address, such as a corporate office location or building owner.

SDG&E account name

- **"SDG&E Account Name"** - The SDG&E Customer Name of Record (as it appears on the Utility bill) for the energy efficiency project installation.

Rebate reservation

- List the Energy Efficiency Business Rebate Program Reservation number received when reserving rebate funds.
- Reservations are encouraged but not required to participate in the program.

» **Incentive project #**

- List Incentive Program Project number for Energy Efficiency Business Incentives and/or Technology Incentives projects.

SDG&E 3rd party program name

- List 3rd Party Program Name(s).
- List the cost amount(s) associated for each 3rd Party Program

Product code (if applicable)

- For Rebate Projects, list the installed equipment Product Code from the Energy Efficiency Business Rebate Product Catalogs

Installed equipment description

- Enter a description of the installed equipment that matches your application

Manufacturer name & model number

- Enter the installed equipment Manufacturer's name and model number. (Note: Installed equipment Manufacturer name and Model number must match submitted Equipment Specification Sheets).
- Accuracy of Manufacturer name and model number helps expedite verification of manufacturer specification sheets and post installation field inspection.

Installed equipment quantity

- Enter total quantity of each installed equipment type

Unit price of installed equipment

- Enter installed equipment individual unit material cost.

Labor

- List the unit labor costs for all measures. (Refer to invoice template "***Total Project Cost" footnote for applicable labor costs). Note: Labor field is optional for rebate measures.

Shipping & handling

- List installed equipment shipping and handling costs for the project.

Signatures

All projects submitted by a Trade Pro must have signed invoices and purchased receipts.

- Include Trade Pro Signature on the invoice. ***Rebate projects that are self-installed are not required to have signatures on purchased receipts.
- Include Customer Signature on the invoice.