

## **Closer Forms/Applications – Winnipeg**

### **After customer agrees to sign up**

#### **Fill in:**

- MAG Solar Installation Agreement MB
- Register the customer for the Canada Greener Homes Loan Portal
- Wave Estimate, send as a pdf attachment to the customer
- Finance It application if the customer is doing bridge financing

#### **Take pictures of: (Upload in Scoop)**

- Main Breaker panel – up close and far away, all labels, main switch zoomed in. Sub panel if the client has one.
- Hydro Meter – up close and far away
- Front, back, and side of the home
- Screenshot on google maps satellite mode of the house zoomed in, indicating which side the meter is located and where the breaker panel is located.
- Go into aurora, design mode and download the picture showing where the panels are placed on the roof, upload to scoop

#### **WhatsApp Group Chat - Fill in:**

#### **(Booking energuide)**

- ENERGUIDE MB – MAG SOLAR - Greenthink
  - Send the customers: Full name, address, email address, phone number, time they prefer for booking

#### **Complete Welcome Call: (Collect \$630 energuide deposit over the phone via credit card or etransfer)**

- Call 604-723-1222 Press 4

## **MAG Solar Installation Agreement MB**

Item & Description		Price
PV Array & Installation		Textbox1
33	Longi Solar	LR5-54HPB-405M
18	hoymiles	HMS-700-2T-NA (240V)
MAG: GST #784283467		
		Subtotal:
		Textbox4
		GST 5%
		Textbox5
		Total: \$37,769.03
		\$630.00
		<sup>1</sup> Balance Due (CAD):

<sup>1</sup>\$600.00 payment due upon your acceptance of this Invoice.

Date	Signature
DAY/MONTH/YEAR Date signed2	
Customer Name	
FULL NAME Full name	

This Invoice is subject to the Terms & Conditions set out in the PV Array Supply and Installation Purchase Agreement

\*Blue is for the closer to fill out, orange is the customers which will arrive in the customers email after you have signed it and filled your portion\*

Textbox1 – Type in the pre-tax amount

- Example: \$37,769.03 Divided by 1.05 (5% GST) = \$35,970.50

Textbox 2 & 3 – Leave blank.

Textbox4 – Pre-tax amount again (\$35,970.50)

Textbox5 – Type in the GST amount (\$1798.53)

Total cost – Pre-tax amount = GST

- Example: \$37,769.03 - \$35,970.50 = \$1798.53

<b>Customer Information</b> (Registered Owner of the Property)		
FULL NAME <b>Full name</b>		
INSTALLATION ADDRESS [REDACTED] <b>Canada</b>		
PRIMARY TELEPHONE NO. <b>1-604-702-8887</b>	SECONDARY TELEPHONE NO.	EMAIL ADDRESS <b>Email address</b>
MAILING ADDRESS (IF DIFFERENT FROM ABOVE) <b>Textbox7</b>		
<b>Customer 2 Information</b> (if Applicable)		
FULL NAME	TELEPHONE NO.	
MAILING ADDRESS (IF DIFFERENT FROM ABOVE)		EMAIL ADDRESS
<b>PRELIMINARY SYSTEM DETAILS*</b>		
DC SYSTEM SIZE <b>13.365</b>		MODULES <b>LR5-54HPB-405M</b>
ESTIMATED INSTALLATION DATE <b>Textbox11</b>		INVERTER <b>HMS-700-2T-NA (240V)</b>
<b>PRICING ESTIMATE*</b>		
PV ARRAY PRICE <b>Textbox12</b>	ADDITIONAL SERVICES DESCRIPTION <b>Energuide Fee: \$600.00, Connectivity Fee: \$23.00 per Module, Permits : \$399.00, D-Rate Main Breaker Panel: \$800.00, GST: 5%</b>	
ADDITIONAL PRODUCTS & SERVICES PRICE <b>Textbox13</b>		
TAXES <b>GST 5%</b>		
TOTAL PRICE - TAXES INCLUDED <b>\$37,769.03</b>		
<small>*System details and pricing estimate are an estimate only and are subject to change based on final engineered design requirements. For more information see Section 4 and 5 of the Terms and Conditions.</small>		

This Agreement between: **Full name** (the "Customer"), and MAG Solar (also referred to as "Contractor" or "MAG"), is entered into as of this **day** day of **month** **2024** (the "Effective Date").  
By signing this Agreement, the Customer acknowledges and agrees that they are entering into a legally binding contract with the Contractor. The Customer acknowledges having read and accepted the Terms and Conditions, Schedule A – 1-Year Express Limited Workmanship Warranty, Schedule B – Right to Cancel, Schedule C – Canada Greener Homes Grant.

**Textbox7 (Orange) – Type in N/A or leave blank**

**Textbox11 (Blue) – Estimated install date (Put 60-90 days out)**  
Example: (May – June 2024)

**Textbox12 – Pre-tax amount**  
Example: \$35,970.50

**Textbox13 – N/A**

Textbox12	Energuide Fee: \$600.00, Connectivity Fee: \$23.00 per Module, Permits : \$399.00, D-Rate Main Breaker Panel: \$800.00, GST: 5%																
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<p><b>PAYMENT</b></p> <table border="1"> <tr> <td><b>Financing with Third-Party</b></td> <td><input type="checkbox"/></td> <td>The Customer will furnish the Contractor with a \$600 non-refundable Security Deposit for the EnerGuide energy assessment and pay to the Contractor the Final Price (as defined below), through third-party financing. If the Customer is approved for financing but cancels this Agreement then the Customer will be responsible for the Cancellation Fees outlined in this Agreement. Certain of the rights and obligations of this Agreement are subject to the Customer receiving third-party financing for the cost of the Installation (as defined below).</td> </tr> <tr> <td><b>Paying Cash</b></td> <td><input type="checkbox"/></td> <td>The Customer will furnish the Contractor with a \$600 non-refundable Security Deposit for the EnerGuide energy assessment and pay the Final Price directly to the Contractor prior to install.</td> </tr> <tr> <td colspan="2"><b>Schedule of Progress Payments:</b></td> <td> <table border="1"> <tr> <td><b>DUE UPON CONTRACT SIGNING</b></td> <td>\$600</td> </tr> <tr> <td><b>DUE UPON UTILITY CONNECTION AND BUILDING PERMIT APPROVAL</b></td> <td>\$0</td> </tr> <tr> <td><b>DUE UPON BOOKING DATE OF THE INSTALLATION OF PV ARRAY SYSTEM</b></td> <td>The outstanding balance of the Final Price</td> </tr> </table> </td> </tr> </table>			<b>Financing with Third-Party</b>	<input type="checkbox"/>	The Customer will furnish the Contractor with a \$600 non-refundable Security Deposit for the EnerGuide energy assessment and pay to the Contractor the Final Price (as defined below), through third-party financing. If the Customer is approved for financing but cancels this Agreement then the Customer will be responsible for the Cancellation Fees outlined in this Agreement. Certain of the rights and obligations of this Agreement are subject to the Customer receiving third-party financing for the cost of the Installation (as defined below).	<b>Paying Cash</b>	<input type="checkbox"/>	The Customer will furnish the Contractor with a \$600 non-refundable Security Deposit for the EnerGuide energy assessment and pay the Final Price directly to the Contractor prior to install.	<b>Schedule of Progress Payments:</b>		<table border="1"> <tr> <td><b>DUE UPON CONTRACT SIGNING</b></td> <td>\$600</td> </tr> <tr> <td><b>DUE UPON UTILITY CONNECTION AND BUILDING PERMIT APPROVAL</b></td> <td>\$0</td> </tr> <tr> <td><b>DUE UPON BOOKING DATE OF THE INSTALLATION OF PV ARRAY SYSTEM</b></td> <td>The outstanding balance of the Final Price</td> </tr> </table>	<b>DUE UPON CONTRACT SIGNING</b>	\$600	<b>DUE UPON UTILITY CONNECTION AND BUILDING PERMIT APPROVAL</b>	\$0	<b>DUE UPON BOOKING DATE OF THE INSTALLATION OF PV ARRAY SYSTEM</b>	The outstanding balance of the Final Price
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Financing with Third-Party: If the customer is using Finance it -Click that.

Paying Cash – Line of credit or cash

**\*MAKE SURE YOU EXPLAIN TO THE CUSTOMER, THEY HAVE TO PAY ON DAY OF INSTALLATION OR WE CANNOT START THE INSTALL\***

**\*ALSO EXPLAIN IT TAKES 1-3 MONTHS FOR THE 0% CANADA GREENER HOMES LOAN TO BE FUNDED TO THE CUSTOMER, THEY CANNOT CONTINUE WITH THE PROJECT WITHOUT PAYING FOR IT BY CASH OR USING FINANCE IT DAY OF INSTALL\***

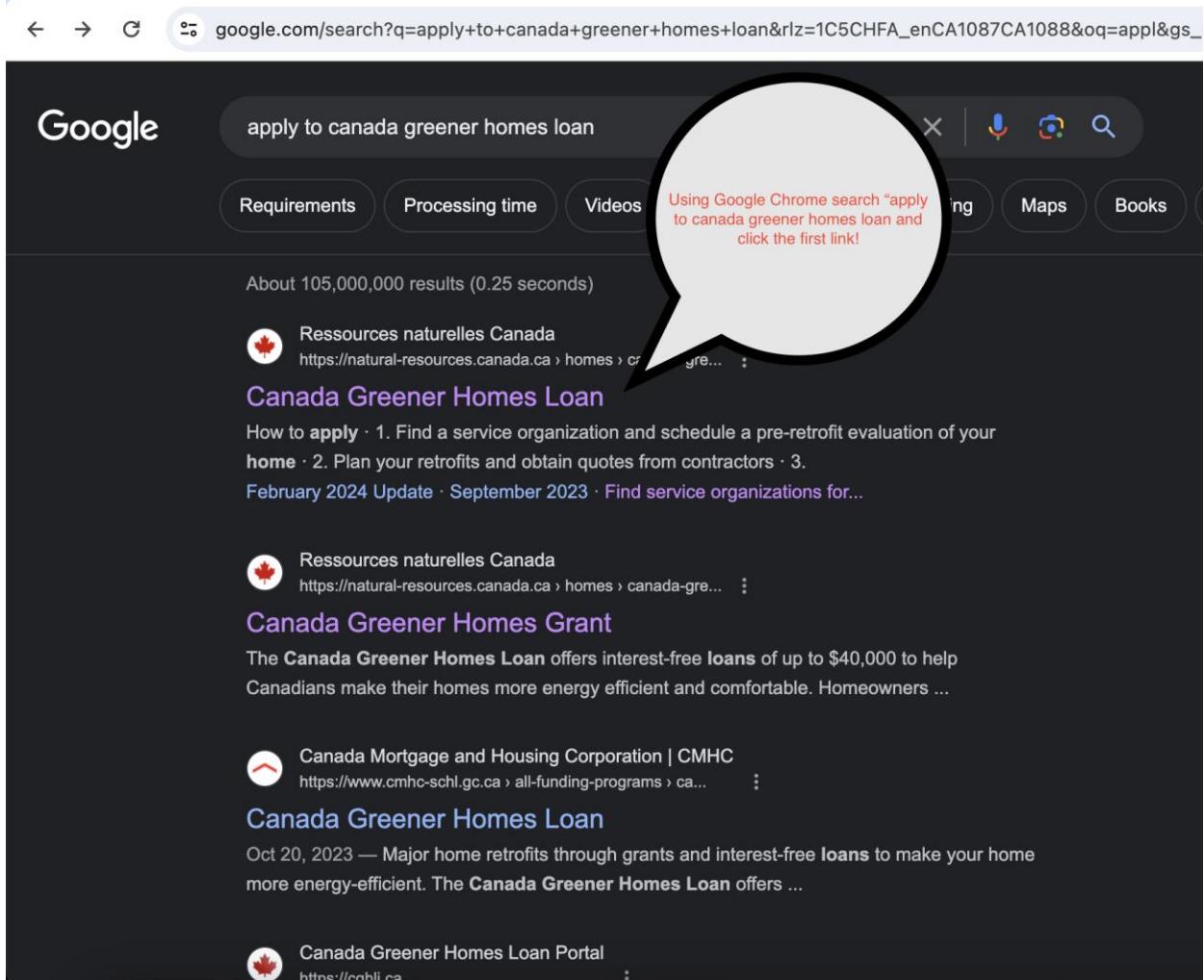
**\*This is the Canada Greener Homes Loan Process\***

**After agreement is completed, click send for signature.**

**\*You will be signing first, then the customers will sign after\***

**Register The Customer for The Canada Greener Homes Loan Portal**

\*Please make sure the customer writes all login information down and saves it, very important as it's tough to log back in if the information is misplaced or forgotten. The login will be used 2-6 weeks after the energuide is completed as that is when the loan portal will be available to apply using this login\*



← → ⌂ google.com/search?q=apply+to+canada+greener+homes+loan&rlz=1C5CHFA\_enCA1087CA1088&oq=appl&gs\_

Google

apply to canada greener homes loan

Requirements Processing time Videos

About 105,000,000 results (0.25 seconds)

Ressources naturelles Canada

<https://natural-resources.canada.ca/homes/canada-greener-homes-loan>

**Canada Greener Homes Loan**

How to **apply** · 1. Find a service organization and schedule a pre-retrofit evaluation of your **home** · 2. Plan your retrofits and obtain quotes from contractors · 3.

February 2024 Update · September 2023 · Find service organizations for...

Ressources naturelles Canada

<https://natural-resources.canada.ca/homes/canada-greener-homes-grant>

**Canada Greener Homes Grant**

The **Canada Greener Homes Loan** offers interest-free **loans** of up to \$40,000 to help Canadians make their homes more energy efficient and comfortable. Homeowners ...

Canada Mortgage and Housing Corporation | CMHC

<https://www.cmhc-schl.gc.ca/all-funding-programs/canada-greener-homes-loan>

**Canada Greener Homes Loan**

Oct 20, 2023 — Major home retrofits through grants and interest-free **loans** to make your home more energy-efficient. The **Canada Greener Homes Loan** offers ...

Canada Greener Homes Loan Portal

<https://cohli.ca>

Using Google Chrome search "apply to canada greener homes loan and click the first link!"

### 3. Submit your loan application before starting any work

To submit your loan application, you will require:

- Pre-retrofit evaluation file number
- Government issued photo identification (ID) with your address (for example, a driver's license. If the ID does not show your address, you must also provide a utility bill that shows your address)
- Property tax bill or assessment
- Detailed quotes from contractors or a complete material and resource list
- Proof of income and employment. Two of the following documents:
  - Most recent pay stub(s) dated within 60 days
  - Letter of employment dated within 60 days
  - Bank statement(s) showing direct deposit for the most recent two-month period
  - Most recent T4 or Notice of Assessment

Scroll all the way down and click the green apply button

Apply for a Canada Greener Homes Loan



#### IMPORTANT NOTICE:

Access to the Canada Greener Homes Loan portal by a person who is not the loan applicant is

## Login to Canada Greener Homes Loan Portal

Register or Login to the Canada Greener Homes Loan portal below.

If you have started your loan journey through the [Canada Greener Homes Grant Portal](#), you will continue to access your loan in the same way.



Important! Always use the same login option and credentials to access the Greener Homes Loan portal. If you use different credentials, you will be treated as a different user.

Have the customer sign up and register

► Keep your personal information secure

#### Option 1: Sign-In

Sign in with your username and password.

Sign in

#### Option 2: Sign-Up

Don't have an account?

Register

Please fill in all information and write down the username, password etc.

cghli.ca/accountDetails ★

## Account Registration

To access the Canada Greener Homes Loan Portal you must register an account, including, a username and password which you will use every time you access the Canada Greener Homes Loan Portal. The instructions for creating a username are set out below. On the pages that follow, you will create a password and recovery questions.

Your Username must contain eight to sixteen characters, no special characters (for example: %, #, @) and may contain up to seven digits. When creating your Username, we recommend:

- Make your Username easy for you to remember and hard for others to guess.
- Avoid using personal information such as your name, Social Insurance Number (SIN), mailing address or email address.
- Always keep your Username secure and do not share it with anyone.

**\* Username**

**\* Email Address**

**Username Checklist**

- 8 - 16 characters
- Does not contain any special characters (@, \$, %, &)
- Does not contain more than 7 digits

cghli.ca/accountDetails

**\* Preferred Phone Number**

**Secondary Phone Number**

**\* Postal Code**

**\* Time Zone**

By continuing, you agree to our [Terms of Use](#), [Application Terms and Conditions](#) and [CMHC Privacy Policy](#). To the extent there is any conflict between the Terms of Use or the Privacy Policy and the Application Terms and Conditions, the Application Terms and Conditions shall govern. By continuing you also understand and accept that (i) you are at all times responsible for your username, password and recovery questions and answers; and (ii) CMHC may revoke your account for security or administrative reasons.

Continue Clear All Cancel

## Create Password

\* indicates a required field

Your Password must be between eight and sixteen characters, contain at least one upper case letter, one lower case letter and one digit, and must not contain 3 or more consecutive characters from your Username.

\* Create Password

\* Confirm Password

After creating a password and clicking continue, the customer will have a verification email come in to complete the registration.

Continue

Clear All

Cancel

### Password Checklist

- 8-16 Characters
- Does not contain 3 consecutive characters from Username
- Lower case letter(s)
- Upper case letter(s)
- Digit(s)
- Passwords match

Please have the customer save the username and login information, as we will need it 2-6 weeks after registering to apply for the loan.

## Creating a Wave Estimate

Please message Manpreet to create you a wave login if you don't have one.

This estimate is required by Canada Greener homes to upload when applying for the loan.

Login using this link: <https://my.waveapps.com/login/>

com/aefd3bf7-70aa-431e-9e7e-21e3366df337/dashboard/

**Dashboard**

**Cash Flow**  
Cash coming in and going out of your business.  
Inflow Outflow Net Change

Connect your bank account or credit card  
Automate your bookkeeping by importing transactions automatically.  
Connect my account

Personal  
Business settings  
Integrations  
Switch businesses  
mchhina@magsolar.com  
Profile settings  
Sign out  
Terms • Privacy Share suggestion

**Dashboard**

**Cash Flow**  
Cash coming in and going out of your business.  
Inflow Outflow Net Change

Connect your bank account or credit card  
Automate your bookkeeping by importing transactions automatically.  
Connect my account

Switch business to  
Personal  
MAG Solar Admin  
Create new business  
Manage your businesses  
Terms • Privacy Share suggestion

wave

Dashboard  
Sales & Payments Estimates  
Invoices Payments Setup Recurring Invoices Checkouts Customer Statements Customers

**Dashboard**  
Create a new ▾

**Cash Flow**  
Cash coming in and going out of your business.  
Inflow Outflow Net Change Last 12 Month

Scan receipts effortlessly, anywhere  
Automatic expense tracking with Wave

MAG Solar

## Estimates

0 Active filters

Select a customer ▾ All statuses ▾ From [date] To [date] Enter estimate #

Active 34 Draft 1 All

 Add customer

Add Customer

Estimate number 7783

Customer ref

Date 2024-03-13

Valid until 2024-04-12

Within 30 days

 Edit columns

Type a customer name

Steven Zoltan

Sukhpreet Jhali

Surya

Surya Kellar

Sylvia/Tirso Urbano

Terrence Lin - 1425652 BC LTD

Todd Simpson

Victoria Bradbury

Virpal Wander

Wayne Bickner

Westbridge Farm

Xuan Nguyen

 Create a new customer

Quantity Price Amount

Subtotal \$0.00

 Add discount

Total CAD (\$) - Canadian dollar  \$0.00

New customer
[Contact](#) [Billing](#) [Shipping](#)

Customer\* Fill all customer information in

Test Testing

Email Test@gmail.com

Phone 604-111-1111

Contact Test Test

[Cancel](#)
[Save](#)

**Billing** Billing [Contact](#) [Shipping](#) [More](#)

**Currency** CAD (\$) - Canadian dollar

**Billing address**

Address line 1 101-7261 River Place

Address line 2 Select currency as CAD, put the customers address, scroll down and click save

City Mission

Postal/ZIP code V4S 0A2

Country Canada

Province/State

[Edit Test Testing](#) [Choose a different customer](#)

Valid until 2024-06-11 [Edit](#)   
 Within 90 days

[Edit columns](#)

Items	Quantity	Price	Amount
<a href="#">+ Add item</a>			
			Subtotal <span>\$0.00</span>
			<a href="#">+ Add discount</a>
<b>Total</b>	CAD (\$) - Canadian dollar <span>▼</span>		<b>\$0.00</b>

Items

Quantity    Price    Amount

Type an item name

Permitting		\$1,700.00
Pre-Energide Assessment		\$0.00
PV Array & Installation 13 LONGi 405W Panels and 7 APS - DS3-S Inverters		\$17,603.57
<b>PV Array &amp; Installation</b>		\$29,487.55
PV Array & Installation 23 LONGI Panels and 12 APS - DS3-S Inverters (9.32KW)		\$32,199.50
PV Array & Installation		\$20,663.36
PV Array and Install 6.48 KW LONGI 405 and APS DS3 Inverters		\$34,000.00
Railing and Racking		\$22,000.00

[Create new product or service](#)

[Edit columns](#)

Items

Quantity    Price    Amount

PV Array & Installation	16 LONGi 405W Panels and 8 Hoymiles 700-2T-NA Inverters (6.48KW)	1	25000.0	\$25,000.00
View income account				ENTER PRE-TAX AMOUNT
		Tax	GST 5% (78428...)	\$1,250.00
		Tax	Select tax	—

PV Array & Installation

16 LONGi 405W Panels and 8 Hoymiles 700-2T-NA Inverters (6.48KW)	1	25000.00	\$25,000.00	
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[View income account](#)

[+ Add item](#)

Tax	GST 5% (784283467)	\$1,250.00	
Tax	Select tax	—	

[+ Add item](#)

0.1 total	\$25,000.00	
GST 5% (784283467)	\$1,250.00	
Total	CAD (\$) - Canadian dollar	\$26,250.00

Here is where you add the energuide (\$600 Deposit)

[+ Add discount](#)

Discount

Energuide	600.00	(\$600.00)	
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Subtotal \$25,000.00

GST 5% (784283467) \$1,220.00

Total CAD (\$) - Canadian dollar \$25,620.00

Notes / Terms

Enter notes or terms of service that are visible to your customer

Footer

[Preview](#) [Save and continue](#)

**Estimate #7783**

[More actions](#) [Create another estimate](#)

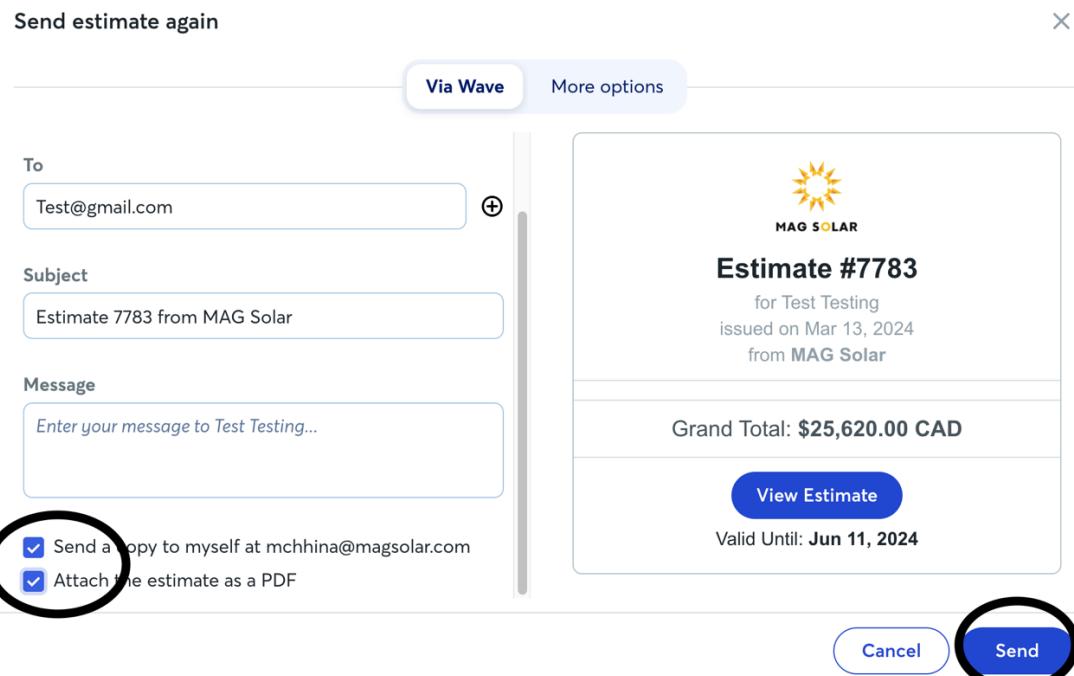
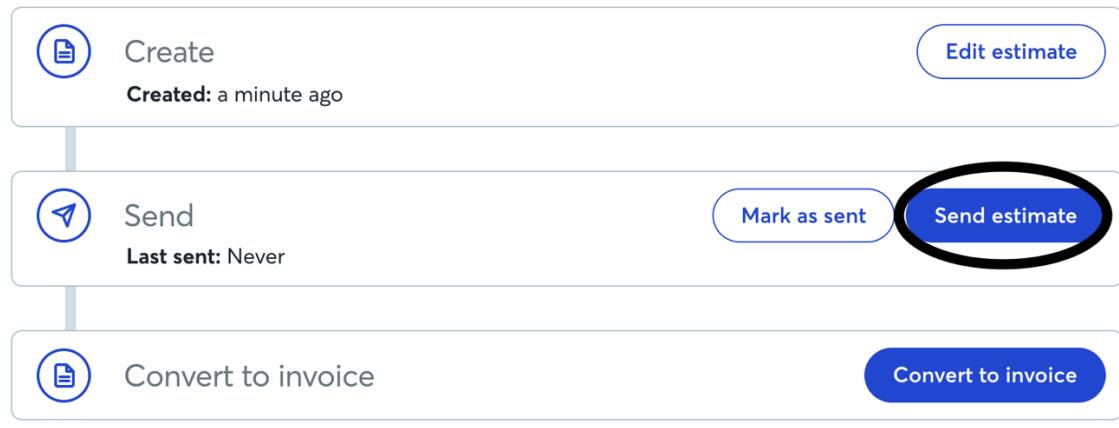
Status **Draft** Customer **Test Testing**

Estimate total \$25,620.00 Valid until June 11, 2024

This is a **DRAFT** estimate. You can take further actions once you approve it. [Learn more](#)

Create [Approve draft](#) [Edit draft](#)

Created: just a moment ago



## **FINANCE IT APPLICATION – If the customer doesn't want to use Cash or a line of credit. (Finance it puts up the funds)**

Use this link to login: <https://www.financeit.ca/en/login>



## Invite your customer to apply for a loan

Optional: Calculate a payment by entering a purchase amount

PLEASE ENTER FULL AMOUNT  
INCLUDING TAXES

Purchase amount (optional)

\$35000

You can change this later.

Amortization period

240 months

Use maximum amortization period

Program

Change

Free Program

0% (\$0.00) cost to partner

Payment frequency

MONTHLY BI-WEEKLY WEEKLY



Invite 

Print

Monthly payment \$436.82

Purchase amount \$35,000.00

APR  13.99%

Term 60 months

Amortization period 240 months

Administration fee  \$149.00

Learn more

\$35000

You can change this later.

Amortization period

240 months

Use maximum amortization period

Program

Change

Free Program

0% (\$0.00) cost to partner



Invite 

Monthly payment \$436.82

Purchase amount \$35,000.00

APR  13.99%

Term 60 months

Amortization period 240 months

Administration fee  \$149.00

Learn more

MONTHLY BI-WEEKLY WEEKLY

Or start an application now

## Purchase details

Purchase category

Exterior Improvement

Purchase type

Solar

## Personal information

First name

Please enter the applicant's name as it appears on their photo ID.

Middle name (optional)

Last name

Date of birth

 Year  Month  Date

YYYY

MM

DD

board

Resources

Advertising



Calculate & Apply

Financing provided by FinanceIt Canada Inc. ("Financeit") as agent for a third-party financial institution.

### Consent to obtain credit report



I agree that Financeit is authorized to verify my identity and assess my loan eligibility through an inquiry with one or more consumer credit reporting agencies. I understand that

[Learn more](#)

**PLEASE MAKE SURE YOU CONFIRM WITH THE CUSTOMER AND LET THEM KNOW FINANCE IT DOES A CREDIT CHECK**

### Consent to electronic disclosures



I consent to receive Disclosures (including the Loan Agreement, Amendments, statements and Renewals, notices and other associated documents) electronically. Note that this is an electronic-only product. If you choose to revoke your Consent, your account will be closed and all amounts outstanding will come due in accordance with the terms and conditions of your loan agreement. See our [Electronic Consent Agreement](#) for more details.

By clicking "Submit", I accept the [FinanceIt Canada Privacy Policy](#). I also confirm that there is no person or company directing me to apply for financing and use this loan on their direction or behalf. [Learn more](#)

**Submit**

Their credit score won't be affected.

The next steps are simple, continue filling in all information. Finance it will confirm on the spot if the customer is approved or not. If the credit isn't as good, you can select to add a co-borrower (spouse) to help get the approval.

## Uploading pictures in SCOOP

Once the agreement is signed, aurora will automatically push the customers information into Scoop. Download the scoop app.



Scoop MAE

Business

Designed for iPad. !

Find your customer and click below:



Form



Activities



Media



Crew

2. PrepWork Pictures \*



