

Welcome to Aurora Admin Configuration Checklist

(X) Reference our <u>Help Center articles on account configuration</u> for more information

General Settings and User Management

Configure your User Profile

Update profile including name, job title, phone number and email address

Update region settings if applicable

Configure Organization Profile

Update profile section including organization name, logo, address, phone number, and email

Update region settings including regional formatting, temperature, measurement system, and currency

Configure User Management

Add new users including their profile, and permissions such as license type and role

Add Roles and Teams if applicable and available on your account

Add Partners if applicable and available on your account

Component Configuration

Configure Components

Toggle on "specify component availability"

Add all components used

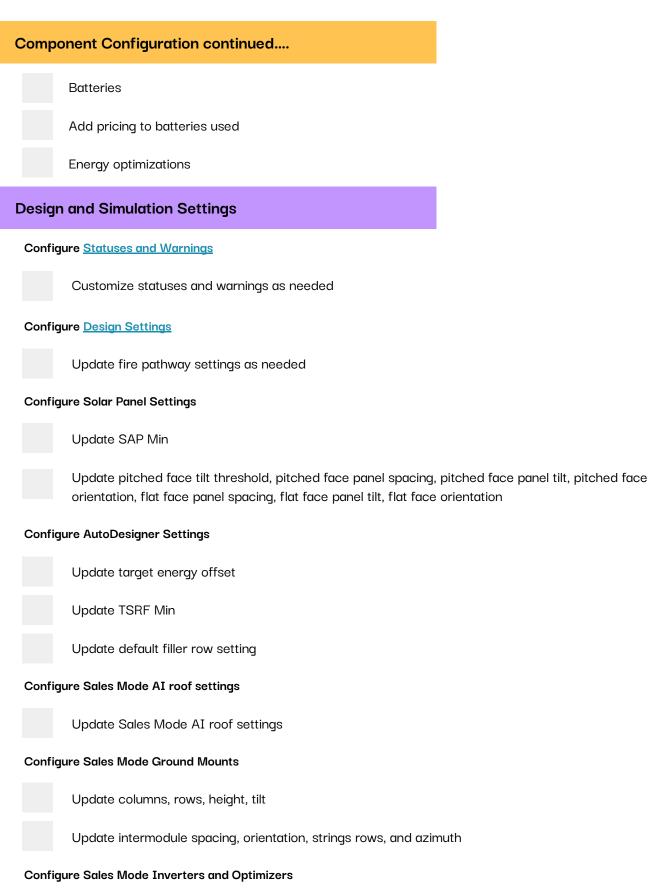
Modules

Inverters

DC Optimizers

Combiner boxes, load centers, disconnects, service panels, meters

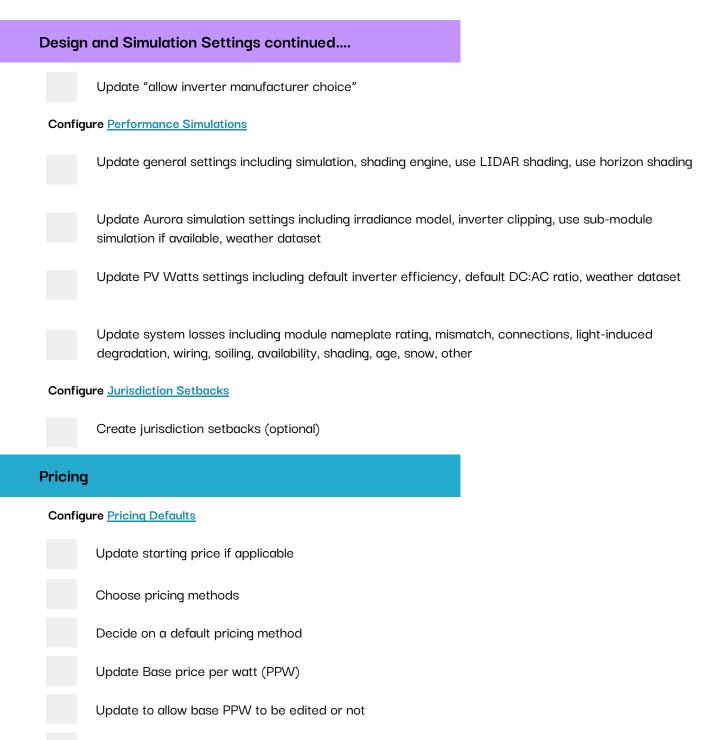




Update "adding inverters to system"

Update "default inverter manufacturer"





Update to show PPW dropdown or not

Configure Default Financing Settings

Update project life and update whether utility bill savings/feed-in tariffs are taxed

Update system maintenance including degradation, inverter replacement cost, inverter life, storage life

Decide on enabling financing comparisons



Pricing continued....



Decide on allowing prepayment amount to be edited, allow for a down payment, and Sales Mode - show payback period

Update commercial settings if applicable

Configure Utility and Tax Rates

Update utility rate escalation including setting a default rate for all projects, set a rate based on location (state)

Decide to include person tax rates including national and local

Configure Adders and Discounts

Create any adders and discounts as needed

Configure Custom Incentives

Add custom incentives as needed *Note that Aurora automatically pulls incentives and utility rates from Genability

Configure Custom Utility Rates

Add custom utility rates as needed *Note that Aurora automatically pulls incentives and utility rates from Genability

Financing

Configure Custom Financing Products

Create any custom financing products including loans, leases, and PPAs

Configure <u>Financing Integrations</u>

Add financing integrations used such as Mosaic, GoodLeap, Sungage, Dividend, EnFin, and Lightreach



Sales Mode Customization

Configure Sales Proposals

Create your own sales proposal or begin with a pre-built Aurora template

Add-on Products

Configure Contract Manager

Configure your Sales Agreements with Contract Manager

Configure Plan Sets



Update Contractor Settings

Configure Apps



Configure Integration Apps

Configure any desired APIs - including generating an API key and building webhooks