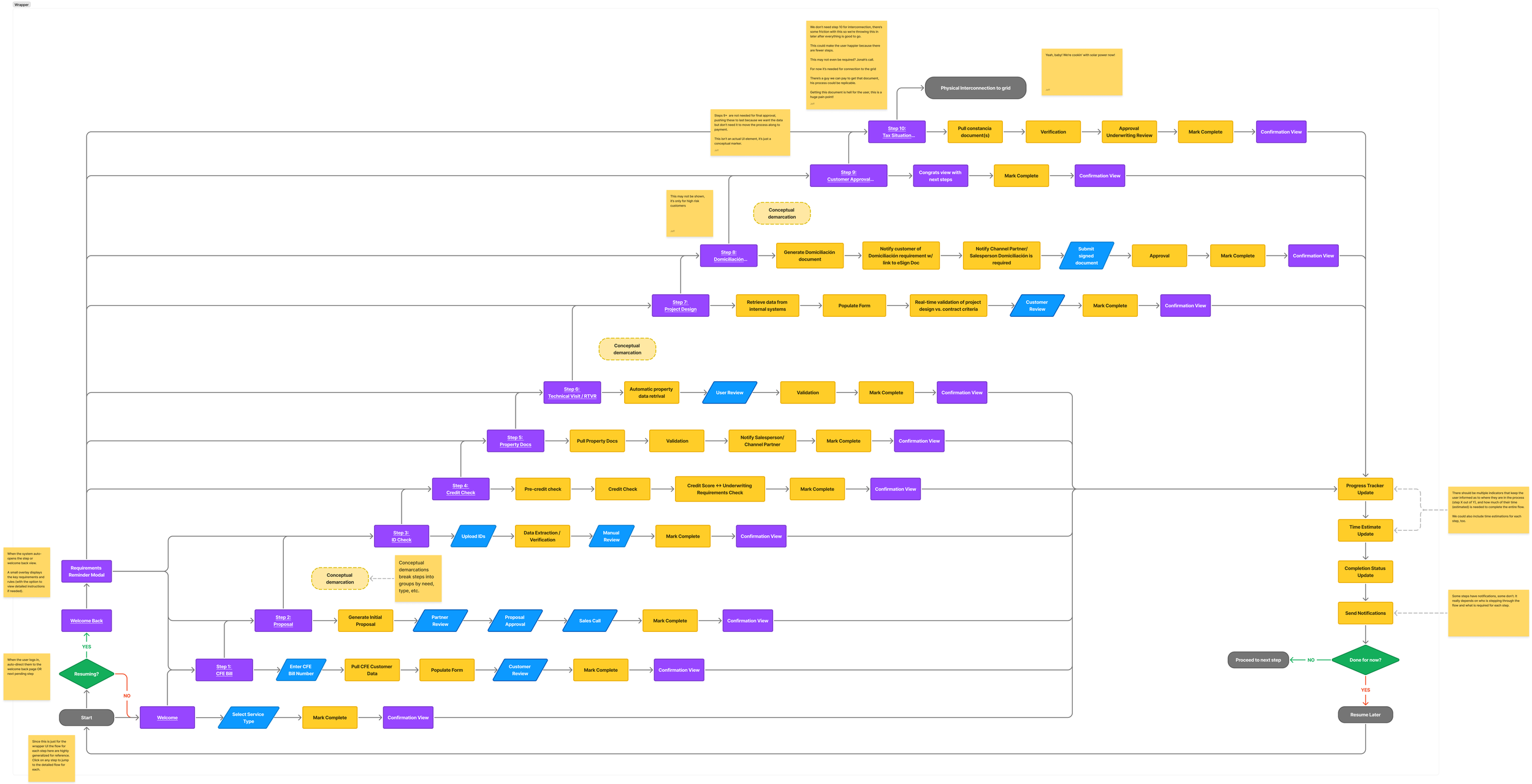
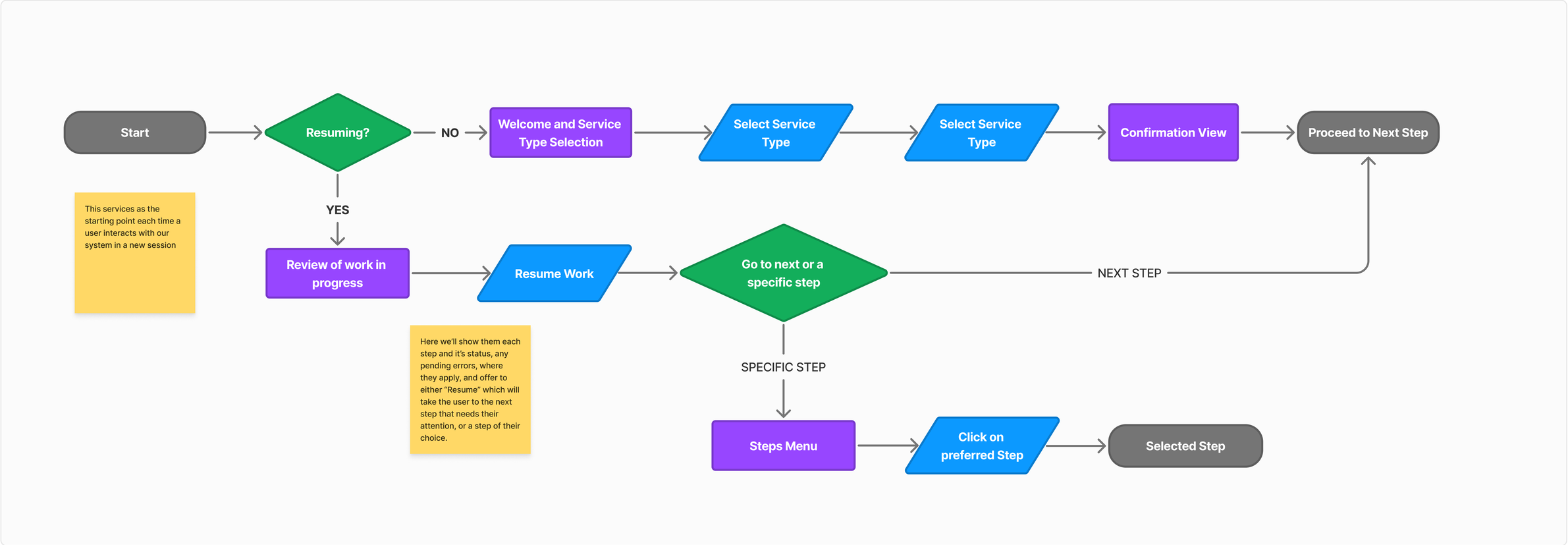
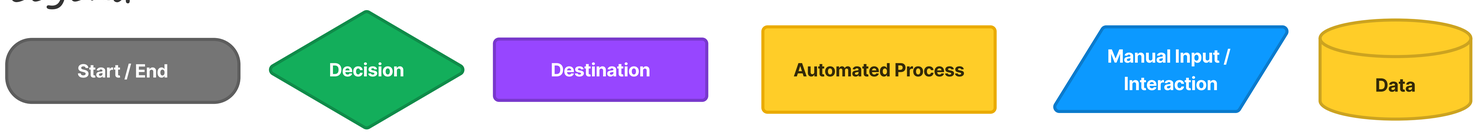
Wrapper


We don't need step 10 for interconnection, there's some friction with this so we're throwing this in later after everything is good to go.
This could make the user happier because there are fewer steps.
This may not even be required? Jonah's call.
For now it's needed for connection to the grid
There's a guy we can pay to get that document, his process could be replicable.
Getting this document is hell for the user, this is a huge pain point!
Jeff
Yeah, baby! We're cookin' with solar power now!
Jeff
Physical Interconnection to grid
Steps 9+ are not needed for final approval, pushing these to last because we want the data but don't need it to move the process along to payment.
This isn't an actual UI element, it's just a conceptual marker.
Jeff
Step 10: Tax Situation...
Pull constancia document(s)
Verification
Approval Underwriting Review
Mark Complete
Confirmation View
Step 9: Customer Approval...
Congrats view with next steps
Mark Complete
Confirmation View
This may not be shown, it's only for high risk customers
Jeff
Conceptual demarcation
Step 8: Domiciliación...
Generate Domiciliación document
Notify customer of Domiciliación requirement w/ link to eSign Doc
Notify Channel Partner/ Salesperson Domiciliación is required
Submit signed document
Approval
Mark Complete
Confirmation View
Step 7: Project Design
Retrieve data from internal systems
Populate Form
Real-time validation of project design vs. contract criteria
Customer Review
Mark Complete
Confirmation View
Conceptual demarcation
Step 6: Technical Visit / RTVR
Automatic property data retrival
User Review
Validation
Mark Complete
Confirmation View
Step 5: Property Docs
Pull Property Docs
Validation
Notify Salesperson/ Channel Partner
Mark Complete
Confirmation View
Step 4: Credit Check
Pre-credit check
Credit Check
Credit Score ↔ Underwriting Requirements Check
Mark Complete
Confirmation View
Step 3: ID Check
Upload IDs
Data Extraction / Verification
Manual Review
Mark Complete
Confirmation View
Conceptual demarcation
Conceptual demarcations break steps into groups by need, type, etc.
Step 2: Proposal
Generate Initial Proposal
Partner Review
Proposal Approval
Sales Call
Mark Complete
Confirmation View
Step 1: CFE Bill
Enter CFE Bill Number
Pull CFE Customer Data
Populate Form
Customer Review
Mark Complete
Confirmation View
Welcome
Select Service Type
Mark Complete
Confirmation View
Start
Resuming?
YES
NO
Welcome Back
Requirements Reminder Modal
When the user logs in, auto-direct them to the welcome back page OR next pending step
When the system auto-opens the step or welcome back view.
A small overlay displays the key requirements and rules (with the option to view detailed instructions if needed).
Since this is just for the wrapper UI the flow for each step here are highly generalized for reference. Click on any step to jump to the detailed flow for each.
Progress Tracker Update
Time Estimate Update
Completion Status Update
Send Notifications
There should be multiple indicators that keep the user informed as to where they are in the process (step X out of Y), and how much of their time (estimated) is needed to complete the entire flow.
We could also include time estimations for each step, too.
Some steps have notifications, some don't. It really depends on who is stepping through the flow and what is required for each step.
Done for now?
NO
Proceed to next step
YES
Resume Later
Adherence to Progressive Disclosure, preventing too much information from being presented to the user at any given time is critical.
Jeff
Optimistic flows are the dominant track here. Assume automated process works
Jeff
Different types of Channel Partners will complete this flow: some hand it off, some will go end-to-end
Jeff
Legend
Start / End
Decision
Destination
Automated Process
Manual Input / Interaction
Data

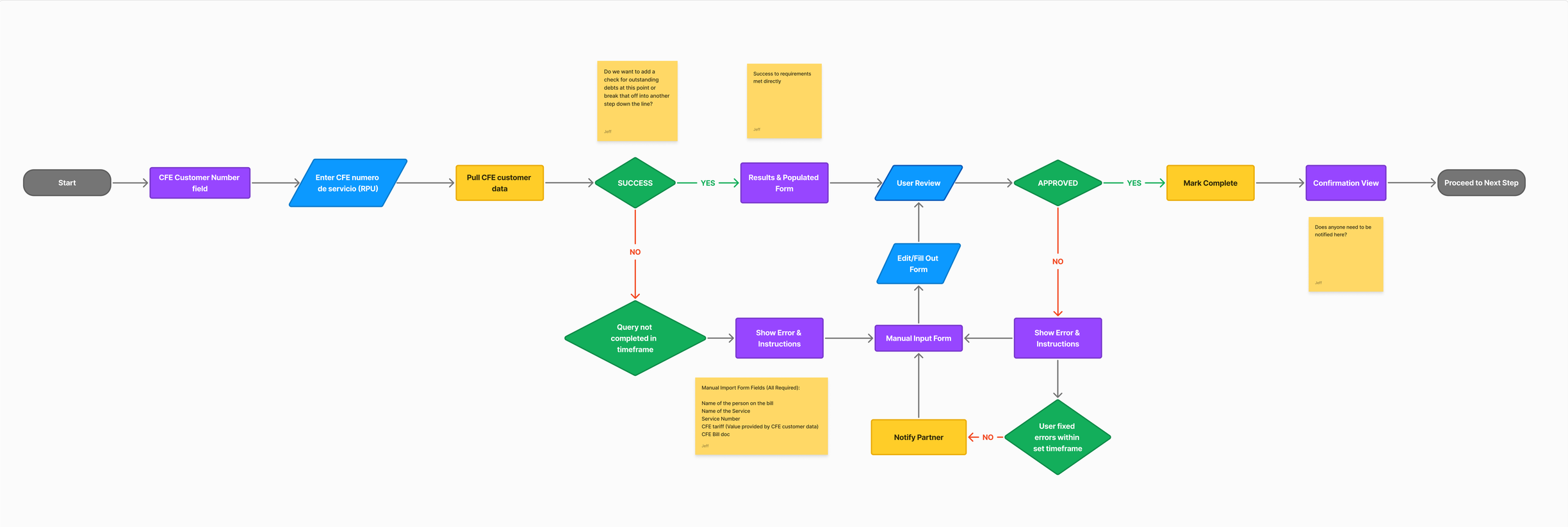
Welcome / Welcome Back



Legend

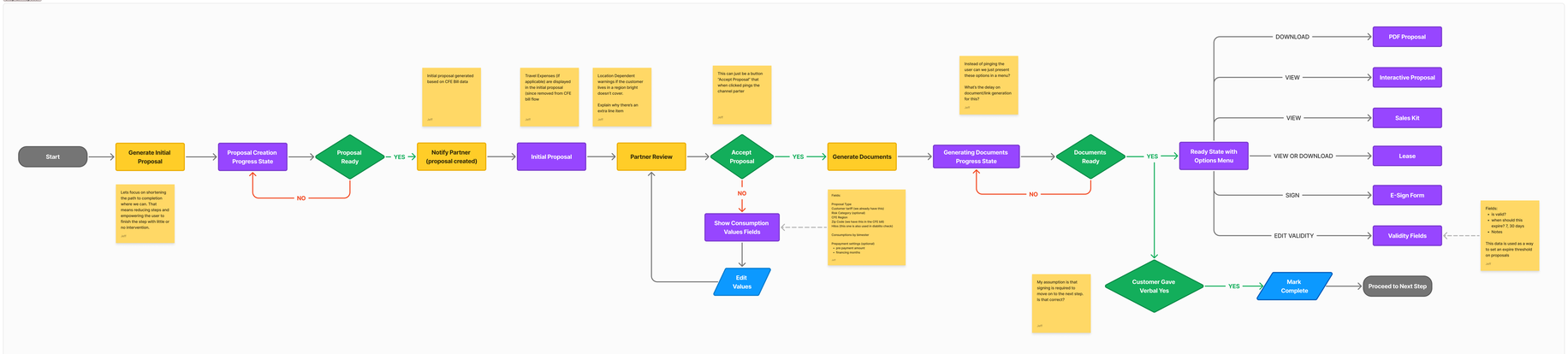


Step 1. CFE Bill



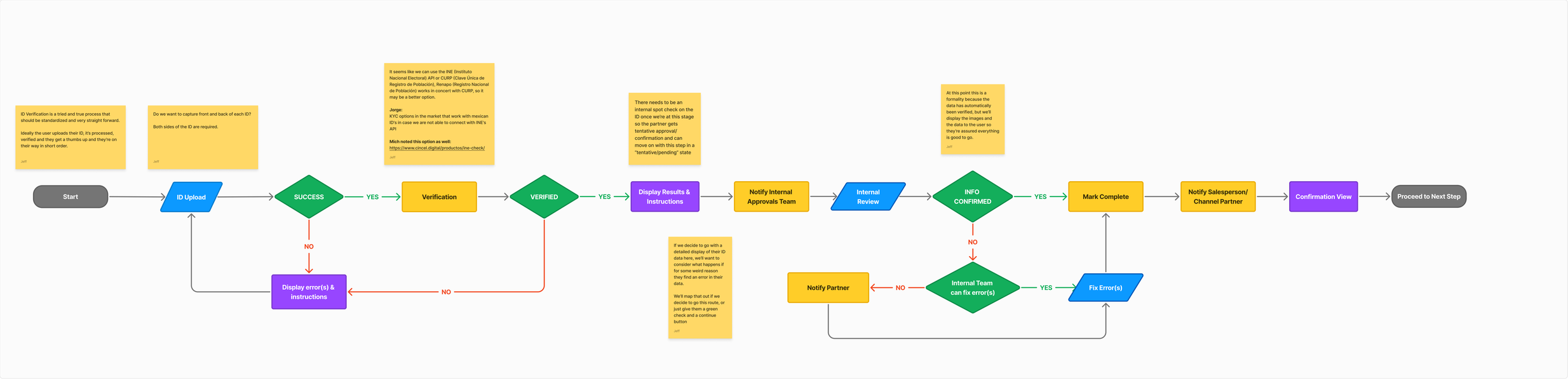
Legend

Step 2. Proposal

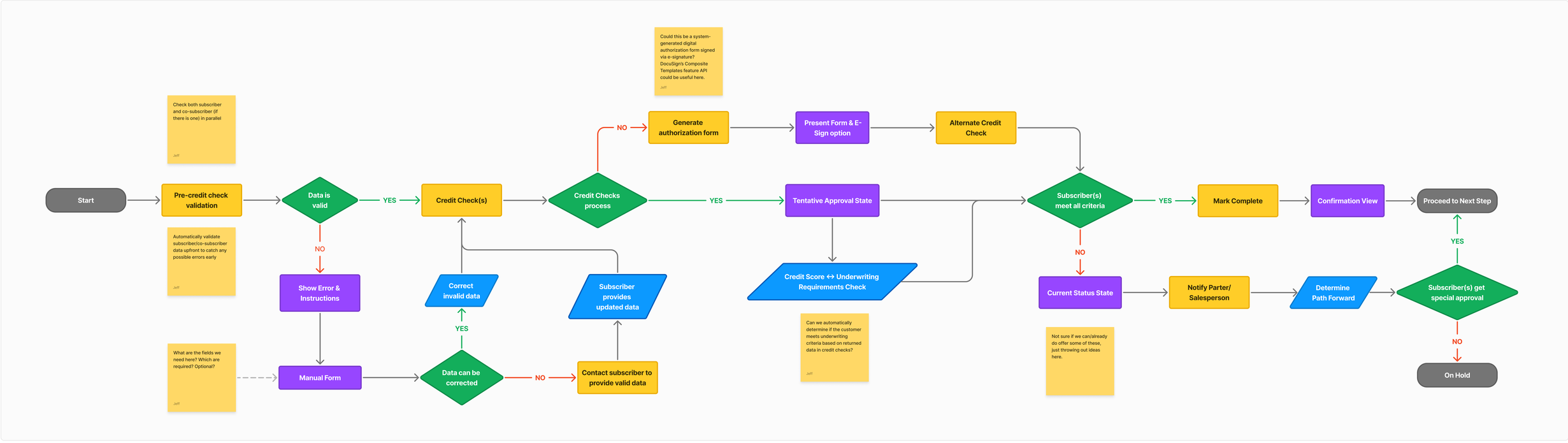


Legend

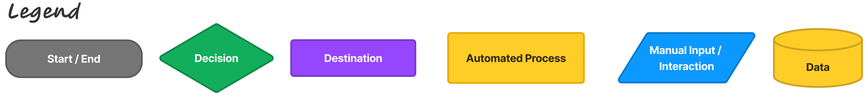
Step 3. ID Check



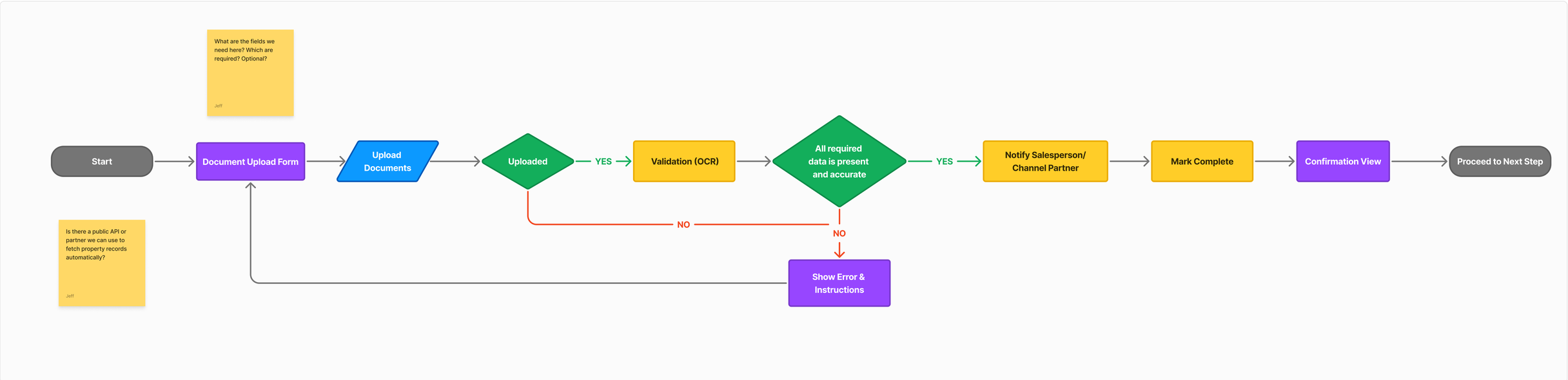
Step 4. Credit Check



Legend

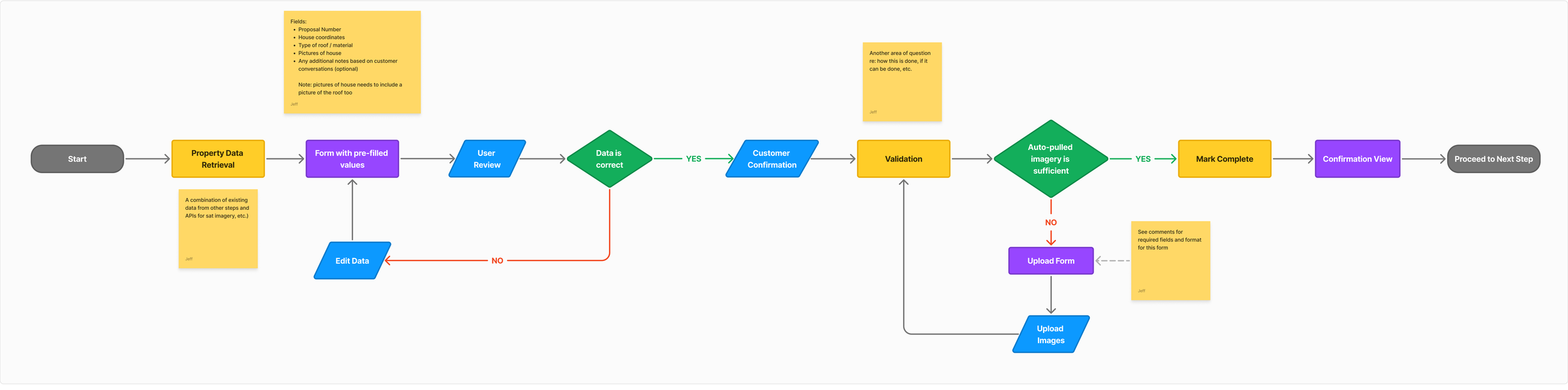


Step 5. Property Docs



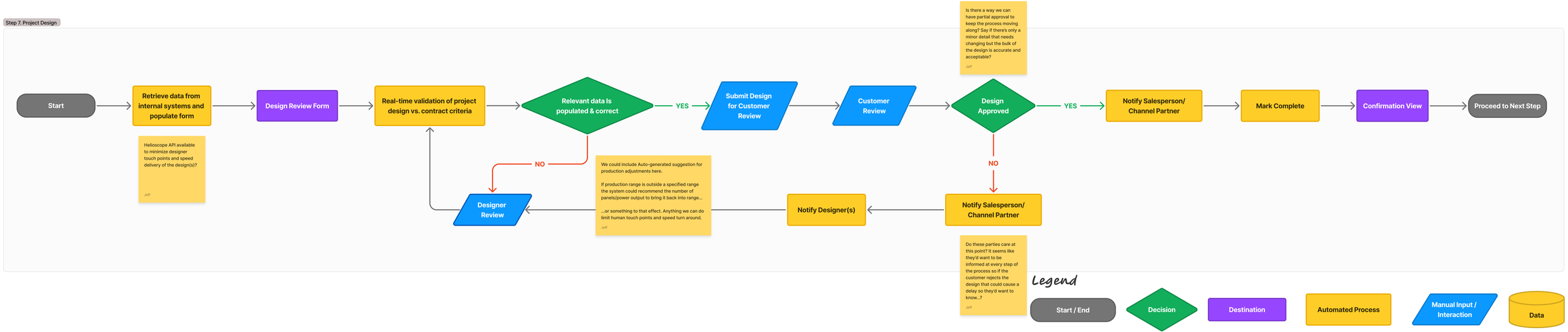
Legend

Step 6. Solicitud de visita técnica / RTVR (Solicitud de visita técnica)

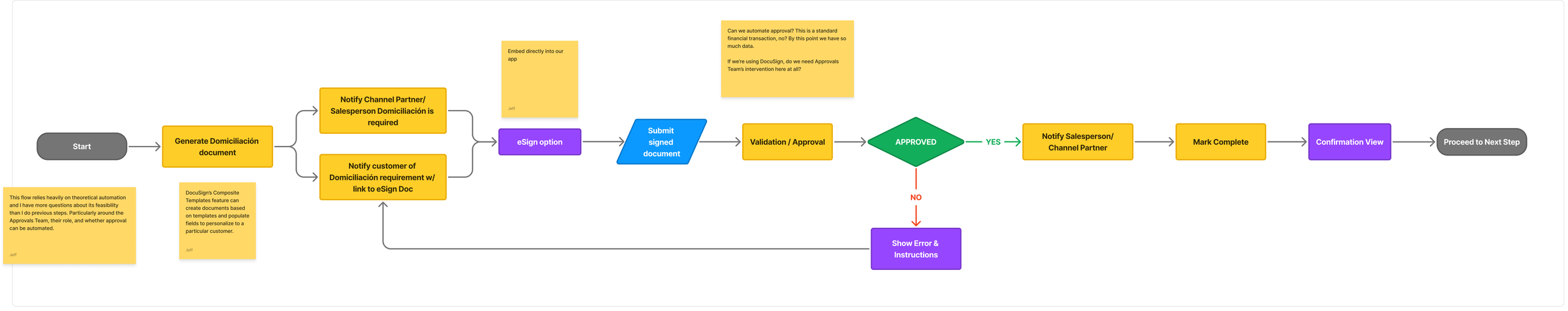


Legend

Step 7. Project Design

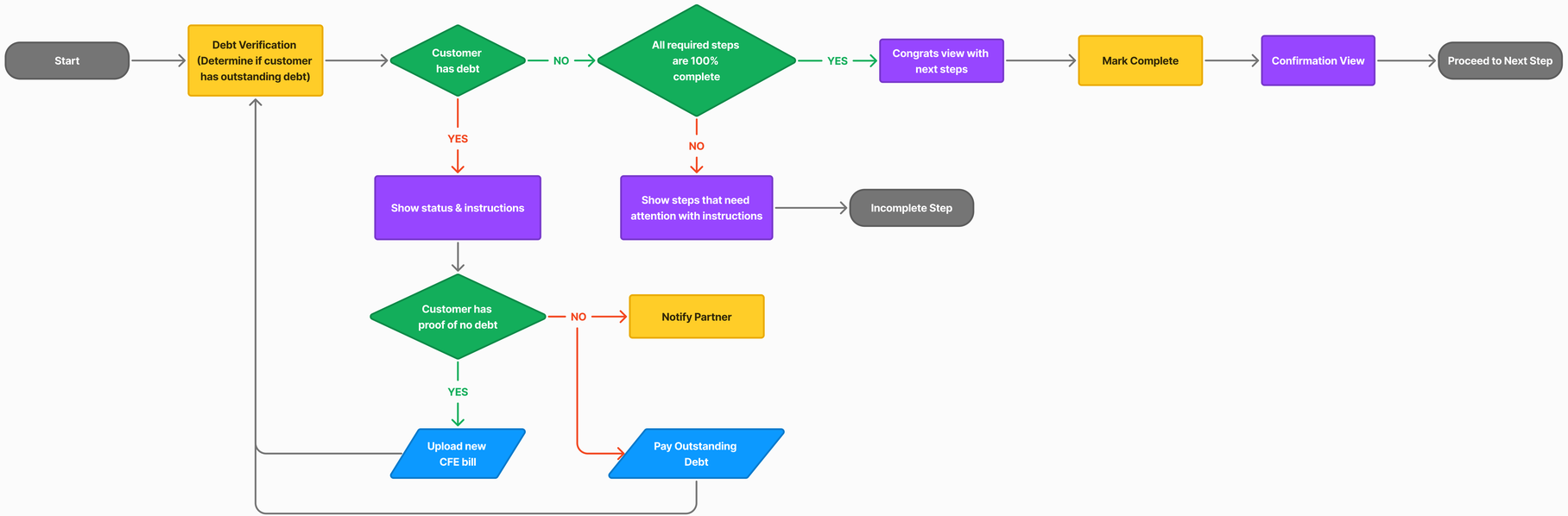


Step 8. Domiciliación



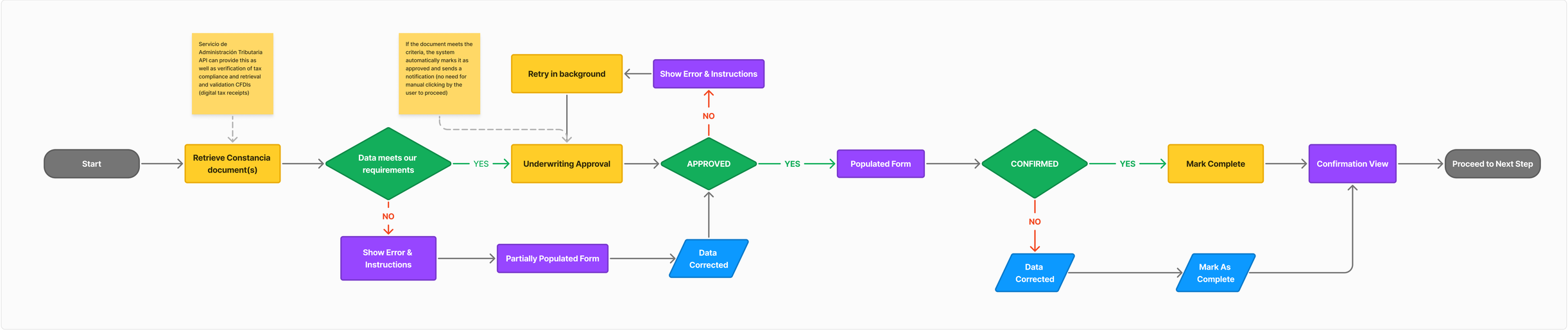
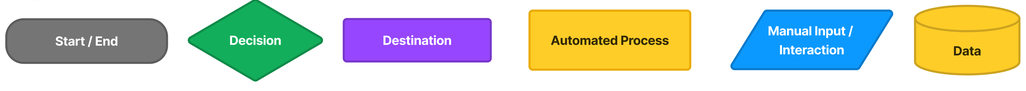
Legend

Step 9. Customer Approval



Legend

Step 10. Tax Situation (Costancia de Situacion Fiscal)



Legend