



A  Sempra Energy utility®

# ENERGY-EFFICIENCY REBATES FOR BUSINESS

## 2013-2014

### POLICIES AND PROCEDURES

Effective January 2013

## CUSTOMER HANDBOOK

Utility Administrator: Southern California Gas Company (SoCalGas®)

## Table of Contents

### Section 1: Program Overview and Policies

1.1 INTRODUCTION .....	1
1.2 ABOUT ENERGY-EFFICIENCY REBATES FOR BUSINESS .....	1
1.3 CUSTOMER ELIGIBILITY .....	1
1.3.1 Rebate limits .....	1-2
1.3.2 Participation in other programs.....	2
1.4 ELIGIBLE EQUIPMENT .....	2
1.5 APPLYING FOR REBATES .....	2
1.5.1 Getting a rebate application .....	2
1.5.2 Reserving rebate funds.....	3
1.5.3 Inspections.....	3
1.5.4 Installing your equipment .....	3
1.5.5 Proof-of-purchase .....	3-4
1.5.6 Completing your rebate application .....	4-5
1.5.7 Benchmarking .....	5
1.5.8 Understanding the agreement on your rebate application .....	5-6
1.5.9 Submitting your rebate application.....	6
1.6 WORKING WITH TRADE PROFESSIONALS.....	6-7
1.6.1 Finding a trade professional .....	7
1.7 RELEASING PAYMENT TO THIRD PARTIES.....	7
1.7.1 Trade Professional as payee .....	7-8
1.7.2 Landlord or tenant as payee.....	8
1.8 REBATE PROCESSING.....	8
1.8.1 Incomplete rebate application.....	8
1.8.2 Post-field inspection .....	8-9
1.9 ABOUT YOUR REBATE CHECK .....	9
1.9.1 Taxes .....	9
1.9.2 Rebate adjustment .....	9
1.9.3 Stop-payment and check reissue.....	9
1.10 REBATE REFUNDS .....	10

### Section 2: Equipment Terms and Conditions

2.1 EQUIPMENT ELIGIBILITY OVERVIEW .....	10
--	----

### Appendix

Appendix A Sample Itemized Invoice

Appendix B Sample Trade Professional Invoice

## SECTION 1: Program Overview and Policies

### 1.1 Introduction

Southern California Gas Company's (SoCalGas®) 2013-2014 Energy-Efficiency Rebates for Business (EERB) is a nonresidential retrofit program offering cash rebates to business customers who install energy-efficient equipment.

Installing energy-efficient equipment at your business can help reduce your energy consumption and operating expenses. Rebate programs, such as the EERB program, are designed to encourage such installations by helping you offset the cost.

### 1.2 About Energy-Efficiency Rebates for Business

The EERB program is administered by SoCalGas under the auspices of the California Public Utilities Commission (CPUC). It offers rebates to commercial, industrial, agricultural and other nonresidential customers for the purchase of qualifying **gas technologies** that improve the efficiency of their businesses. Qualifying energy-efficient equipment must be purchased new. Used and rebuilt equipment are not eligible for rebates.

EERB program rebates are paid by check directly to the customer or to a third-party payee designated by the customer. The amount of the rebate is determined based upon the qualifying equipment installed.

The 2013-2014 EERB program runs from January 1, 2013 until December 31, 2014. Rebate applications must be postmarked or received by SoCalGas by December 31, 2014. The program has a limited budget. Rebates are paid to qualifying customers on a first-come, first-served basis until the deadline or until program funds are no longer available—whichever comes first. *First-come, first-served* status will be determined by the date the rebate application arrives at the SoCalGas mailing address printed on each rebate application. Customers are encouraged to submit their applications as early as possible.

### 1.3 Customer Eligibility

The EERB program is open to all nonresidential customers with existing buildings that have a natural gas account with SoCalGas. Nonresidential customers include commercial, non-profit, industrial, federal agencies and agricultural customers. Properties such as single-family homes, condominiums, apartments and other residential dwellings are not eligible for 2013-2014 EERB program rebates. However, common areas in multi-family properties (i.e. laundry rooms, recreation rooms, offices) may be assigned nonresidential rate schedules, in which case they are eligible if they are on a **qualifying** nonresidential rate schedule. For more information on rate schedules, call SoCalGas at 1-800-427-2000.

Cogeneration projects are not eligible for the EERB program.

#### 1.3.1 Rebate Limits

The total rebate limit for the EERB program is \$200,000 per customer, per year, including corporate (multiple) accounts.

The total greenhouse heat curtain rebate cannot exceed the lesser of:

- \$50,000 per account per year, or
- 50 percent of the account's preceding 12 months of natural gas consumption (therms) x \$0.80 (average prorated if less than 12 months usage is available).

Boiler and large instantaneous water heater rebates cannot exceed \$25,000 per unit, subject to the maximum \$200,000 cap per customer, per program year as detailed above.

Under no circumstances will rebates exceed 100 percent of the purchase price of the item. **For purposes of the EERB program, "purchase price" includes unit cost plus installation labor.** Customers who self-install may not charge installation labor. This charge applies to vendor labor only. **Sales tax is not included in the item's purchase price.**

### 1.3.2 Participation in Other Programs

If you have received an incentive or services from another state or local Public Purpose Program Surcharge (PPPS) program, you are ineligible to receive a 2013-2014 EERB program rebate for the same measure(s). (PPPS is a nonbypassable surcharge imposed on all utility retail sales to fund public goods research, development and demonstration, energy-efficiency activities, and possibly to support low-income assistance programs.) Conversely, if you receive an EERB program rebate from SoCalGas, you are ineligible to receive additional incentives or services from other state or local PPPS programs for the same measure(s). This does not include rebates from the water agency if the equipment qualifies for one.

Contact your SoCalGas representative, or call SoCalGas at 1-800-427-2000, if you have any questions regarding eligibility.

## 1.4 Eligible Equipment

All equipment must be new. Used or rebuilt equipment does not qualify for the 2013-2014 EERB program. No fuel switching is allowed – gas equipment can only be replaced with qualifying gas equipment. New equipment must be for an existing building, with the exception of commercial cooking equipment (which could qualify for rebates at either new accounts or existing accounts).

A complete list of qualifying measures and equipment requirements can be found in the EERB Rebate Guide. Please be sure to read the technical requirements for each measure before purchasing your equipment. Go to **socalgas.com** (search "REBATE APPLICATION"), or call 1-800-427-2000 if you have any questions.

Customers are required to include the manufacturer's technical specifications sheet along with their rebate applications. This is especially important if you are unsure whether or not the equipment you purchased qualifies for a rebate. SoCalGas will review the rebate application and manufacturer's technical specifications sheet and make a determination as to whether the equipment qualifies. All equipment models do not qualify. The decision of SoCalGas is final.

Equipment efficiency listed ratings from the California Energy Commission (CEC) and/or Gas Appliance Manufacturers Association (GAMA) prevail over all submitted technical documentation, unless otherwise approved. For commercial steam boilers and for commercial cooking equipment, the Food Service Technology Center thermal efficiency will be determined by subtracting 2 percent from the boiler's combustion efficiency, unless there is better information available from the manufacturer.

## 1.5 Applying for Rebates

### 1.5.1 Getting a Rebate Application

Go to **socalgas.com** (search "REBATE APPLICATION"), contact your SoCalGas representative, or call SoCalGas at 1-800-427-2000, to request an EERB application. Printed rebate applications are available in English.

### 1.5.2 Reserving Rebate Funds

You may reserve funds prior to purchasing and installing your equipment. Reservations are not required; however, to ensure funding availability, and to lock in rebate levels for 45 days, you must reserve funds before you purchase and install equipment. Reservations do not guarantee that a rebate will be paid for any equipment that does not qualify for EERB. The customer is solely responsible for purchasing equipment that meets the qualifying energy-efficient specifications and the terms and conditions of the 2013-2014 EERB program. If you are unable to install the equipment before the reservation expires (45 days), you may request a 15-day extension. Greenhouse heat curtain reservations are valid for 90 days with no extension. If you are unable to install the equipment prior to the end date of your extension, you must start the reservation process again by requesting a new reservation number. The program terms and conditions in effect at the time of the new reservation will apply to the new reservation number.

Call SoCalGas at 1-800-508-2348 to reserve funds.

### 1.5.3 Inspections

SoCalGas, the California Public Utilities Commission (CPUC), or any authorized third-party representative reserves the right to inspections after installation – and before or after rebate payment – to verify that the equipment is properly installed, operating and providing the related energy savings. The rebate will not be paid if participation in any required pre-payment verification is refused. Projects may be selected for evaluation studies and/or program measurement by external contractors appointed by the CPUC. These types of studies are used to analyze current program performance and improve future programs.

### 1.5.4 Installing Your Equipment

You may install some qualifying measures yourself, or you may hire a vendor to do the installation for you. If you do self-install, equipment must be installed pursuant to the manufacturer's specifications. Check with the equipment manufacturer to ensure that you adhere to state and local building codes and ordinances and the manufacturer's requirements.

Prior to installing your equipment, you should review the terms and conditions on the EERB Rebate Guide. **Equipment must be paid in full, installed and operational prior to submitting your rebate application.**

### 1.5.5 Proof-of-Purchase

**You must include proof-of-purchase for all equipment for which you are applying for a rebate with each rebate application.** This documentation should include all of the following information:

- Customer name and address of installation;
- Text description of each type of equipment installed;
- Make or brand name and model number;
- Serial number (if applicable);
- Quantity installed;
- Cost per unit;
- Sales tax;
- Date of purchase;
- Vendor contact information (if applicable); and
- Receipt/invoice that shows fully paid.

Your paid invoice must be dated between January 1, 2013 and December 31, 2014. It is very important to include a description, make and model of the equipment purchased and a manufacturer's specification sheet. This information is compared against various equipment databases to verify that your equipment qualifies for a rebate.

ACCEPTABLE PROOF-OF-PURCHASE	
<b>RECEIPTS</b>	Either itemized invoices or cashier's receipts could qualify for proof-of-purchase, but they must include all of the information listed above. See Appendix A for a sample of an acceptable itemized invoice.
<b>VENDOR INVOICES</b>	If a vendor, contractor, or any other trade professional installs your equipment, your proof-of-purchase will likely be in the application of a <b>paid</b> invoice. Make sure your vendor/trade professional separates the material cost from the labor cost and indicates " <b>paid</b> " on the invoice. See <i>Appendix B</i> for a sample of a valid trade professional invoice.
<b>EQUIPMENT LEASES</b>	Rebates will be paid on leased equipment providing the lease is for a period of five years or more. A copy of the lease agreement must accompany the rebate application.
UNACCEPTABLE PROOF-OF-PURCHASE	
<b>SIGNED CUSTOMER STATEMENTS</b>	Statements and letters describing your purchases are not acceptable as proof-of-purchase.
<b>VENDOR BIDS</b>	Bids alone are not acceptable as proof-of-purchase; however, they can be submitted with a vendor's invoice to provide added detail about the installation.
<b>ORDER FORMS</b>	Customer order forms are not acceptable as proof-of-purchase.
<b>PURCHASE ORDERS</b>	Purchase orders are not accepted as proof of purchase. Final invoices are required.

### 1.5.6 Completing Your Rebate Application

You must complete *one rebate application per account or service I.D. number*. Make sure that each rebate application you submit includes the correct account and/or service I.D. number for the area in which you are installing your equipment. If you are not sure which area within the facility corresponds to each account or service I.D. number, please contact your facility manager or a SoCalGas representative. In some cases, bulk purchases for multiple locations may be consolidated as a "Bulk Purchase Form," detailing the pertinent information for each location, and submitted with a single application. Contact your SoCalGas representative for details.

The 2013-2014 EERB Guide and Application contains detailed instructions on how to apply:

- 1) *Fill out the customer information section, including account information and federal tax I.D. number;*
- 2) *Calculate your rebate by multiplying the quantity of eligible equipment purchased times the corresponding rebate amount;*
- 3) *Add up all rebates and write the total rebate amount in the space provided at the bottom of the application;*
- 4) *Sign and date the rebate application.*

**Your signature on the rebate application confirms that you accept the terms and conditions of the EERB program.** Downloaded rebate applications can be submitted electronically to [EERebatesforBusiness@socalgas.com](mailto:EERebatesforBusiness@socalgas.com), or by fax to 323-518-2368.

If you receive a single bill or a group bill for several accounts, please do not include the group bill number on your EERB rebate application. Your rebate application cannot be processed if you include only the group bill number. Be sure to include the specific service account or service I.D. number corresponding to the area in which you have installed your equipment.

### **1.5.7 Energy-Efficiency Benchmarking**

Energy-efficiency benchmarking compares your facility's level of energy efficiency with that of similar facilities nationwide. Benchmarking allows building owners and managers to track and assess the energy performance of their buildings at no charge.

**How can benchmarking help you?** Benchmarking can help your business to:

- Prioritize energy-efficiency investments
- Track energy-efficiency improvements over time
- Receive Environmental Protection Agency (EPA) recognition
- Get certification for your building under LEED (Leadership in Energy and Environmental Design)

For more information, visit [socalgas.com](http://socalgas.com) (search "BENCHMARKING").

### **1.5.8 Understanding the Agreement on Your Rebate Application**

When you sign your rebate application, you are signing a contract stating that you agree to the terms and conditions set forth in the EERB program.

By signing the rebate application, you are certifying that the equipment was purchased and installed prior to submitting your rebate application and between January 1, 2013 and December 31, 2014.

Your signature also denotes that you agree to continue using the installed equipment for the life of the products or for five (5) years, whichever is less. If you do not provide this benefit, SoCalGas has the right to seek a refund of a prorated amount of the rebate paid to you, depending on the period of time that you provided the related energy-efficiency benefits.

The scenarios below outline various situations under which SoCalGas may seek refund from a customer:

- **Equipment Not Installed** – If the equipment is not properly installed and functioning, no energy savings are being provided, and SoCalGas has the right to a refund from you of 100 percent of the rebate paid, even if you released the rebate payment to a third-party payee.
- **Relocated** – If you change your service address and close your utility account at that address, SoCalGas has the right to invoice you for a prorated portion of the rebate amount paid to you. **Assuming that the equipment remains in use at the service address**, you will not owe a refund if the account becomes active again within 24 months through reconnected service by a new tenant or owner, or if the account is only inactive temporarily (less than 90 days).
- **Equipment Removed** – If you remove equipment for which you have already received an EERB program rebate, SoCalGas has the right to invoice you for a prorated portion of the rebate amount paid to you.
- **Equipment Failed** – If the equipment is no longer operating, you are responsible for replacing it with equipment that offers the same energy savings as the measure for which you received a rebate. If you do not replace the equipment, SoCalGas has the right to invoice you for a prorated portion of the rebate amount paid to you. Check your vendor contract to determine if your equipment is under warranty. SoCalGas is not responsible for goods and services selected by customers.

### 1.5.9 Submitting Your Rebate Application

You can complete and submit your rebate application package electronically to [EERebatesforBusiness@socalgas.com](mailto:EERebatesforBusiness@socalgas.com) or by fax to 323-518-2368. You can also mail it to:

**Southern California Gas Company**

Attn: C/I Energy-Efficiency Rebates for Business

Box 513249 ML 19A8

Los Angeles, CA 90051

All rebate applications must be received at SoCalGas or postmarked by the deadline date of December 31, 2014. SoCalGas is not responsible for delayed, lost or misdirected mail. This program has a limited budget. Rebate applications will be accepted on a first-come, first-served basis until the deadline is reached or until all allocated funds are no longer available, whichever comes first.

### 1.6 Working with Trade Professionals

You may choose to work with a trade professional to purchase and install qualifying equipment. You are responsible for obtaining your own trade professional(s). For the purposes of the 2013-2014 EERB program, “trade professionals” may include but are not limited to:

- Equipment manufacturers, distributors, wholesalers, or retailers;
- Equipment contractors (installers); and
- Energy service providers.

Trade Professionals who promote the program must follow the terms listed in the *2013-2014 EERB Guide and Application*. Trade professionals who wish to join the Trade Professional online directory must follow and sign the *Trade Professional Agreement and Application*.

Trade Professionals participating in the EERB program are neither commissioned nor endorsed by SoCalGas. Trade Professionals participating in the program (1) are not affiliated with SoCalGas; (2) have not been selected by SoCalGas; and (3) have not entered into any contractual agreement with SoCalGas, other than the *Trade Professional Agreement and Application*. You should select your trade professional with care the same way you select any other service provider that you hire. Additionally, license requirements are solely the responsibility of the trade professional.

If any energy-efficient equipment is removed or found to be deficient, you are responsible for replacing such equipment even if your trade professional was the recipient of the rebate; otherwise, you may be required to refund SoCalGas a prorated amount of the rebate. Therefore, you should thoroughly understand your trade professional's contract, including your equipment warranty.

If you experience an equipment problem or if you are not satisfied with the quality of work of a trade professional you hired, you must contact the trade professional directly to resolve the issue. If the issue cannot be resolved to your satisfaction, consider contacting the *Contractors State License Board* at 1-800-321-2752 if your trade professional is a licensed contractor. You may also contact the *Better Business Bureau*. In no event is SoCalGas responsible for any equipment problems or problems with your trade professional.

### 1.6.1 Finding a Trade Professional

There are many trade professionals in the SoCalGas service territory who are familiar with the EERB program. Many of these trade professionals contact and solicit eligible customers offering to retrofit their facilities with energy-efficient equipment and to facilitate program participation. Many trade professionals even maintain their own supply of EERB rebate applications, and they can explain the program to you and help you identify potential retrofits at your facility. Again, these trade professionals are not affiliates, representatives, agents or employees of SoCalGas – they are individual contractors utilizing a utility rebate program.

Although SoCalGas does not select or endorse any trade professionals, any trade professionals who wish to participate in the Trade Professional online directory must complete and sign the *Trade Professional Agreement and Application*. As noted above, however, trade professionals have no other contractual relationship with SoCalGas.

## 1.7 Releasing Payment to Third Parties

You may have your rebate payment released to your trade professional or any other third-party payee. To make your rebate check payable to another party, you must complete Section 3 (Person to Receive Check) of the 2013-2014 EERB application.

SoCalGas will report this payment made to the third party on IRS form 1099 as "other income" to you (the customer receiving the benefit of the EERB rebate payment) unless the payment is less than \$600, or you have identified yourself as a corporation or exempt. You are urged to consult your tax advisor concerning the taxability of rebates. SoCalGas is not responsible for any taxes that may be imposed on you as a result of this rebate.

Whether the rebate is paid directly to the customer, a designated trade professional or any other third party, you are still responsible for ensuring that the equipment provides the energy savings as specified in the Agreement on your rebate application.

### 1.7.1 Trade Professional as Payee

In many cases, trade professionals who are familiar with the EERB program figure the potential rebate amount into their job estimate. In such cases, customers sometimes agree to have their rebate checks made payable to and mailed to their trade professionals.

By signing Section 3 (Person to Receive Check) of the EERB application, you are granting permission for SoCalGas to release information, such as your account number and rate schedule, to your trade professional, the new payee, as required to process the rebate application and resolve any issues surrounding your potential rebate.

Your trade professional's invoice must clearly show that the rebate is being deducted from the sales price with your permission (i.e., you must sign the invoice and initial the price reduction). See *Appendix B* for a sample of a valid trade professional invoice.

### 1.7.2 Landlord or Tenant as Payee

Landlords (i.e. building owners, property management companies) and tenants sometimes work together to facilitate installation of energy-efficient equipment in leased spaces. These arrangements may involve one party releasing a rebate payment to the other party.

For instance, if a leasing tenant is the utility customer of record, but the landlord purchases and installs qualifying equipment, the tenant may sign Section 3 (Person to Receive Check) of the EERB application requesting the rebate check be made payable to the landlord. Conversely, if a landlord is the customer of record but the tenant purchases and installs equipment, the landlord may release payment to the tenant.

Such arrangements between landlords and tenants should be agreed upon prior to either party installing equipment.

## 1.8 Rebate Processing

Upon receipt, your rebate application will be reviewed by SoCalGas to make sure the application was completed correctly and that the package includes all of the necessary documentation. The package must be complete before it is approved for payment.

### 1.8.1 Incomplete Rebate Applications

- If the rebate application is incomplete, SoCalGas processing center representatives will try to reconcile information with you or your vendor, or with utility resources. This process may include a phone call from SoCalGas, or the rebate application may be returned to you with a letter describing the problem.
- After your rebate application has been approved by SoCalGas, it will be authorized for payment and a rebate check will be issued.

### 1.8.2 Post-Field Inspection

- A sampling of rebate applications will receive post-field inspections, which are performed to verify that measures are installed, operating and providing the related energy savings. These inspections are performed prior to issuing rebate checks. SoCalGas also has the right to perform inspections after issuing rebate checks, verifying that measures are still installed, operating and providing the related energy savings for a period of five (5) years or for the life of the product, whichever is less.
- You must provide inspectors access to the equipment for verification purposes during normal business hours: 8 a.m. to 5 p.m., Monday through Friday, excluding holidays.

- If inspectors determine that a measure, such as a boiler, for which you applied for a rebate is not installed at your facility, or is not operational, your rebate application will be rejected. You may submit a new rebate application after the equipment has been properly installed and is operating, if funds are still available.
- If inspectors determine that a measure, with multiple items, such as square footage for greenhouse heat curtains, or multiple steam traps, for which you applied for a rebate is only partially installed, you will be rebated only for the qualifying equipment that is installed and operating.
- If you refuse to allow the inspector access to the eligible equipment, your rebate application will be rejected and no rebate will be paid.
- Situations where inspectors report that they were unable to gain access to a facility will be handled on a case-by-case basis.

## 1.9 About Your Rebate Check

### 1.9.1 Taxes

Rebates are generally considered subsidies for tax purposes and could be taxable. Rebates greater than \$600 will be reported to the IRS on form 1099 as “other income” unless you have identified yourself as a corporation or exempt. You are urged to consult your tax advisor concerning the taxability of these rebates. Southern California Gas Company is not responsible for any taxes that may be imposed on your business as a result of your receipt of this rebate.

### 1.9.2 Rebate Adjustment

If you have received your rebate check and wish to dispute the amount, call the SoCalGas toll-free support line, 1-800-427-2000, for assistance. The problem will be investigated, and you will be notified of the results. If an adjustment is warranted, you must return the original rebate check to SoCalGas, and a new check in the correct amount will be issued. If you have already cashed your check and you believe that you are entitled to a higher rebate amount, you may be required to submit an additional rebate application. If you have already cashed your check and your rebate should have been lower, you will be invoiced for the overpaid amount at the discretion of SoCalGas. In each situation, SoCalGas' decision is final.

### 1.9.3 Stop-Payment and Check Reissue

Contact your SoCalGas representative or call the SoCalGas toll-free support line at 1-800-427-2000, if you need to stop payment on a check and/or if you need a check to be reissued for any reason including:

- Payee name change – If the name of the payee has changed, provide updated payee information, including name, mailing address and phone number. Return the original check as directed, and a new check will be issued to the correct party.
- Check lost, stolen or misplaced – If your check is lost (or never received), stolen, or misplaced, please contact SoCalGas right away to arrange for a replacement check.
- Stale-dated check – A “stale-dated” check is one that is no longer valid because it was not cashed within the allotted time period printed on the check. The original check should be returned to SoCalGas, and a new check will be issued.

## 1.10 Rebate Refunds

Once you receive your rebate check, you are required to adhere to the conditions of the signed rebate application, which in part requires that you will provide SoCalGas with energy savings for five (5) consecutive years or the life of the product. If conditions at your facility change, you may be required to refund a portion of your rebate to SoCalGas. See Understanding the Agreement on *Your Rebate Application* (section 1.5.8) for more details.

## SECTION 2: Equipment Terms and Conditions

### 2.1 Equipment Eligibility Overview

Equipment that qualifies for an EERB program rebate must meet the specific terms and conditions of the EERB program. These terms and conditions can be found in the rebate guide. Please take the time to read it thoroughly so that you understand the requirements. Contact SoCalGas if you have questions.

The EERB program is intended to encourage businesses and non-profit organizations to install new energy-efficient technologies. Customers may receive rebates for qualifying foodservice equipment installed at either new accounts or existing accounts. Other qualifying equipment needs to be installed only at existing accounts in order to receive rebates. All equipment must be new. Used or rebuilt equipment is not eligible for a rebate. Fuel switching (i.e. electric equipment to gas equipment) does not qualify.

If you are uncertain whether equipment qualifies, contact a utility representative. CEC and/or GAMA equipment efficiency listed ratings prevail over all submitted technical documentation, unless otherwise approved. For commercial cooking equipment, you can find the list of all qualifying gas equipment at [fishnick.com/saveenergy/rebates](http://fishnick.com/saveenergy/rebates).

You must include a manufacturer's specification sheet documenting the size and efficiency of the equipment.

# Appendix A

**Joe Smith Company**  
**1 123 East Main Street, Anytown CA 90000**  
**Tel: 123.456.7898 Fax: 987.654.3211**

**2 Sold To:**  
 Name: Harry's Manufacturing Co.  
 Address: 555 W. Fifth Street  
 City/State/Zip: Anytown, CA 90000  
 Contact: Harry Brown

**3 Invoice:**  
 Date: 11/23/10  
 Invoice #: 12345

**4**

Qty	Model	Serial #	Make	Description	Unit	Total
20	880	A-XX	Armstrong	Steam Trap	\$150.00	\$3,000.00
2	WH3-1532B	R-XX	Raypak	Water Heater	\$35,000.00	\$70,000.00
500'	Fiberglass	NA	Owens Corning	Pipe Insulation	\$1.50	\$750.00
Material						\$73,750.00
Tax						\$6,084.38
Installation						\$0
Invoice Total						\$79,834.38

Customer Signature: \_\_\_\_\_

**PAID**

**5**

- 1** Vendor/Trade Professional name and address
- 2** Customer name and address
- 3** Purchase date
- 4** Itemized list of equipment with quantity, model, description and unit price
- 5** Marked paid (stamped or show zero balance due) or payment due date

## Appendix B

**Joe Smith Company**

**1 123 East Main Street, Anytown CA 90000**

**Tel: 123.456.7898 Fax: 987.654.3211**

**2 Sold To:**

Name: Harry's Manufacturing Co.

Address: 555 W. Fifth Street

City/State/Zip: Anytown, CA 90000

Contact: Harry Brown

**3 Invoice:**

Date: 11/23/10

Invoice #: 12345

**4**

Qty	Model	Serial #	Make	Description	Unit	Total
20	880	A-XX	Armstrong	Steam Trap	\$150.00	\$3,000.0
2	WH3-1532B	R-XX	Raypak	Water Heater	\$35,000.00	\$70,000.00
500'	Fiberglass	NA	Owens Corning	Pipe Insulation	\$1.50	\$750.00
<b>Material</b>						\$73,750.00
<b>Tax</b>						\$6,084.38
<b>Installation</b>						\$0
<b>Invoice Total</b>						\$79,834.38
<b>Less SoCalGas Rebate</b>						\$4,990.00 <b>5</b>
<b>Total After Rebate</b>						\$74,844.38

Customer Signature: \_\_\_\_\_

**PAID** **6**

- 1** Trade Professional name and address
- 2** Customer name and address
- 3** Purchase date
- 4** Itemized list of equipment with quantity, model, description and unit price
- 5** **If trade professional is rebate payee**, total rebate amount deducted from sales price
- 6** Marked paid (stamped or show zero balance due) or payment due date