Dealer Portal User Guide

Introduction

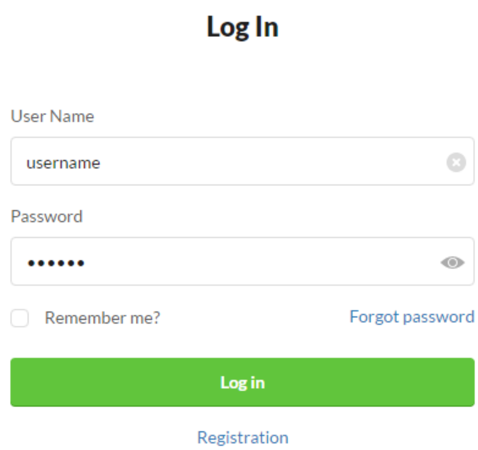
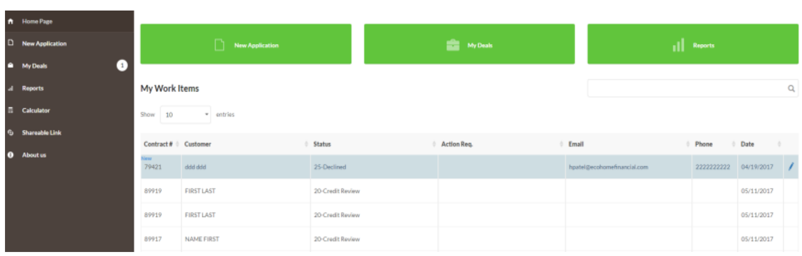
This user guide outlines the steps to create a credit check for a customer in order to meet requirements for lending or rental.
This guide outlines the steps to create and print a contract for a rental or loan customer.

Guidelines

- Create customer using the Dealer Portal
- Request credit check using the Dealer Portal
- Create the contract using the Dealer Portal
- Upload all required documents to the Dealer Portal

Process

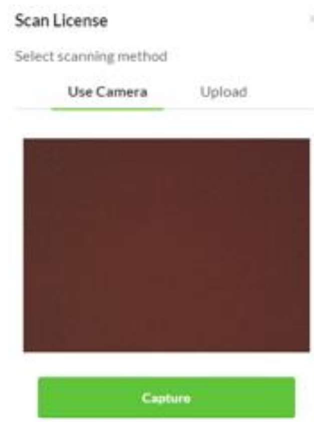
Process – Creating new application in the Portal

Step	Action
1	Click on the following URL: https://beta.ecohomefinancial.com/ecohome
2	Enter your user name and password on the Log In page as provided to you by your EcoHome Sales Manager 
3	You will be directed to your Dashboard upon successful login 
4	To create a new application, you can click on ‘New Application’ in the Menu on the left side of the screen OR click on the ‘New Application’ icon at the top of the screen

Process, Continued

Process (continued)

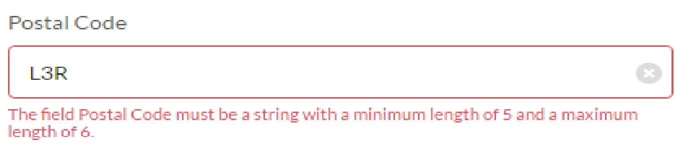
Step	Action
5	Complete the Installation Address and Borrower Information sections: Begin by clicking on the Scan License button:

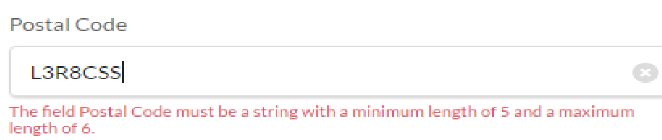
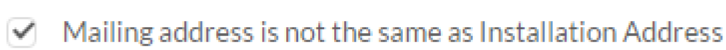
Data Field	Requirement
Scan License	Click on the green 'Scan License 'icon, the following will appear to allow you to capture an image of the customers Driver's License barcode located on the back of the Driver's License  Mobile users click Capture Desktop users click Upload ***Sample image of back of Driver's License:*** 
First Name (manual entry)	Key in the customers first name – this is a mandatory requirement
Last Name (manual entry)	Key in the customers last name – this is a mandatory requirement
Date of Birth	Select the customers date of birth from the calendar – this is a mandatory requirement
SIN (manual entry)	Key in the customers Social Insurance Number
Driver's License Number (manual entry)	Key in the customers Driver's License number

Process, Continued

Process (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>6</td><td>Complete the Installation Address Information section:
<table>
<tr><th>Data Field</th><th>Requirement</th></tr>
<tr><td>Get My Location (optional)</td><td>Click on the green ‘Get My Location’ icon, the address information section will be automatically completed in the form</td></tr>
<tr><td>Installation Address (manual entry)</td><td>Key in the customers address where the installation will occur – this is a mandatory requirement
The address will begin to pre-fill as you type to allow you to select the entire address

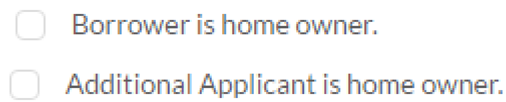
</td></tr>
<tr><td>Unit # (manual entry)</td><td>Key in the customers unit # if one is provided</td></tr>
<tr><td>City (manual entry)</td><td>Key in the city of the customers address – this is a mandatory requirement</td></tr>
<tr><td>Province (manual entry)</td><td>Key in the province of the customers address – this is a mandatory requirement</td></tr>
<tr><td>Postal Code (manual entry)</td><td>Key in the postal code of the customers address – this is a mandatory requirement. This field will accept 6 characters for Canada and 5 characters for US.



</td></tr>
</table></td></tr>
<tr><td>7</td><td>If the mailing address is different from the installation address, click the box as per below in the form to enter customers mailing address

</td></tr>
<tr><td>8</td><td>If there is an additional applicant, click on the blue icon as shown below to enter the secondary applicant’s information as previously completed for the primary applicant

</td></tr>
</table>

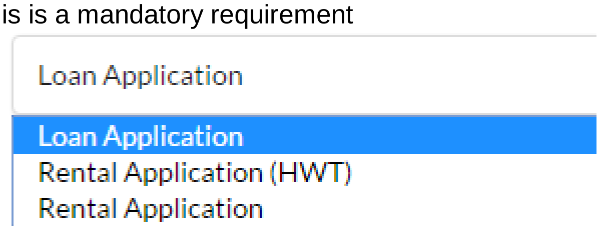
Process, Continued

Process (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>9</td><td>You will have to select if the one of the applicants is the home owner. In order to proceed to Step 2 one of the applicants must be the homeowner in which the installation is to occur

</td></tr>
<tr><td>10</td><td>Click on the green ‘Save and Proceed’ icon at the bottom of the page to move to the next steps – you have now created the customer’s information

</td></tr>
<tr><td>11</td><td>In order to proceed with the credit check you will need to receive consent from the customer, once this is received click the ‘Agrees to send his/her personal date to credit check’ box as shown below

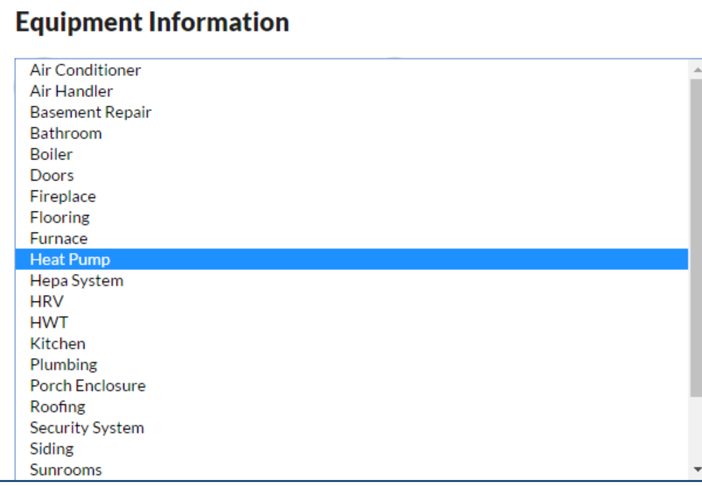
</td></tr>
<tr><td>12</td><td>Click the green ‘Credit Check’ icon at the bottom of the page to proceed with the customer’s credit check

</td></tr>
<tr><td>13</td><td>You are now brought to the Equipment Information section. At this point at the top of the page you will see a response from the credit check created in Step 12.
You will receive one of the below response messages:
Credit Check Processed Successfully – Pre-approved amount will display
Unable to Proceed at This Time – XXXX (This request has been declined during the credit check)
No Message – this application will proceed for credit review</td></tr>
<tr><td>14</td><td>Complete the Equipment Information section:<table><tr><th>Data Field</th><th>Requirement</th></tr><tr><td>Type of Agreement</td><td>Select the appropriate agreement from the drop-down list – this is a mandatory requirement

</td></tr></table></td></tr>
</table>

Process, Continued

Process (continued)

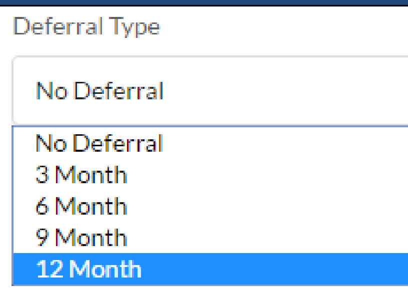
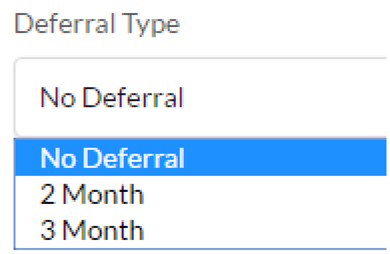
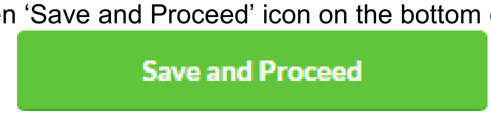
Note: At all times the calculator will appear on the right hand side of the screen and is visible while scrolling on the page

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>14 con't</td><td>
<table>
<tr><th>Data Field</th><th>Requirement</th></tr>
<tr><td>Type</td><td>Select the type of equipment the customer wants to have installed – this is a mandatory requirement. The equipment list is sorted alphabetically

</td></tr>
<tr><td>Description</td><td>This is a freeform field to enter a description of the installation – this is a mandatory field</td></tr>
<tr><td>Cost</td><td>This is a free form field, enter the cost of the equipment to be installed – this is a mandatory field</td></tr>
<tr><td>Estimated Installation Date</td><td>Click in the field, a calendar will pop up for you to select the date</td></tr>
</table>
</td></tr>
<tr><td>15</td><td>If more than one piece of equipment is required, click on the blue icon as shown below to add additional equipment

</td></tr>
<tr><td>16</td><td>If there is an administration fee, enter it in the Admin Fee field</td></tr>
<tr><td>17</td><td>If the customer is providing a down payment, enter it in the Down Payment field</td></tr>
<tr><td>18</td><td>Enter the percentage the cutomer will be charged in the 'Customer Rate %' field – this is a mandatory requirement
If providing the customer with an equal billing option enter '0" in this field</td></tr>
<tr><td>19</td><td>Enter the term of the loan in months in the 'Loan Term' field – this is a mandatory requirement</td></tr>
</table>

Process, Continued

Process (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>20</td><td>Enter the amortization period in years in the ‘Amoritization Term’ feild – this is a mandatory requirement</td></tr>
<tr><td>21</td><td>If providing a deferral to the customer, you will have the option to select a 12-month deferral on loan agreements, and rental deferrals will have 2 and 3 month options
<table>
<tr><th>Loan</th><th>Rental</th></tr>
<tr><td>
</td><td>
</td></tr>
</table></td></tr>
<tr><td>22</td><td>In the Sales Rep field, enter your name (the person who met with the customer to complete the contract) – this is a mandatory field</td></tr>
<tr><td>23</td><td>If required, you can enter additional informational about the customers’ existing equipment in the Existing Equipment Information section</td></tr>
<tr><td>24</td><td>If required, you can enter ‘Additional Contract Information’ in the contract notes area</td></tr>
<tr><td>25</td><td>Click on the green ‘Save and Proceed’ icon on the bottom of the page

</td></tr>
<tr><td>26</td><td>Complete the Contact Information section: If there are two applicants, this section will appear for both customers in order to collect their contact information
<table>
<tr><th>Data Field</th><th>Requirement</th></tr>
<tr><td>Home Phone</td><td>Enter customers home phone number – this is a mandatory requirement</td></tr>
<tr><td>Cell Phone</td><td>Enter customers cell phone number – this is a mandatory requirement</td></tr>
<tr><td>Business Phone</td><td>Enter customers business number if one is provided</td></tr>
<tr><td>Email Address</td><td>Enter customers email address if one is provided</td></tr>
<tr><td>House Size (sq. ft.)</td><td>Enter the size of a customer’s home if this is provided</td></tr>
<tr><td>Consent to Contact Customer</td><td>Check this box if this customer wishes to be contacted in the future</td></tr>
</table></td></tr>
</table>

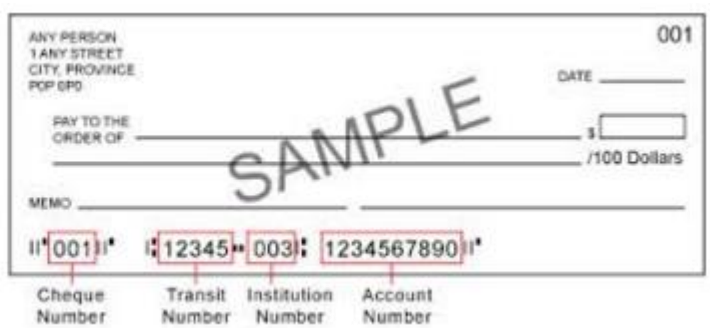
Note: At all times the calculator will appear on the right hand side of the screen and is visible while scrolling on the page

Process Continued

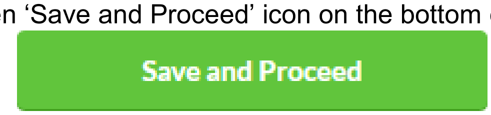
Process (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>27</td><td>Select the customers method of payment from the ‘Payment Type’ drop down
<table>
<tr><th>If…</th><th>Then…</th></tr>
<tr><td>Enbridge is selected</td><td>Enter the customers account number in the Enbridge Gas Distribution Account # field – this is a mandatory requirement if Enbridge is selected as a payment method</td></tr>
<tr><td>PAP is selected</td><td>
<table>
<tr><th>Data Field</th><th>Requirement</th></tr>
<tr><td>Bank Number (manual entry)</td><td>Enter the customers bank number (this is 3 digits)</td></tr>
<tr><td>Transit Number</td><td>Enter the customers transit number (this is 5 digits)</td></tr>
<tr><td>Account Number</td><td>Enter the customers bank account number (this can be up to 12 digits)</td></tr>
</table>
</td></tr>
</table>

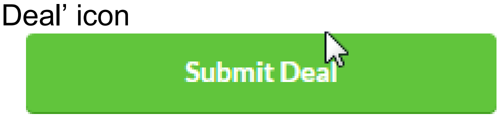
Sample of cheque image



</td></tr>
<tr><td>28</td><td>Click on the green ‘Save and Proceed’ icon on the bottom of the page



</td></tr>
<tr><td>29</td><td>You are now at the ‘Summary and Confirmation’ Page. Review all the details with the customer, if any changes are required you can make the updates now. If no changes are required, click on the green ‘Submit Deal’ icon



</td></tr>
</table>

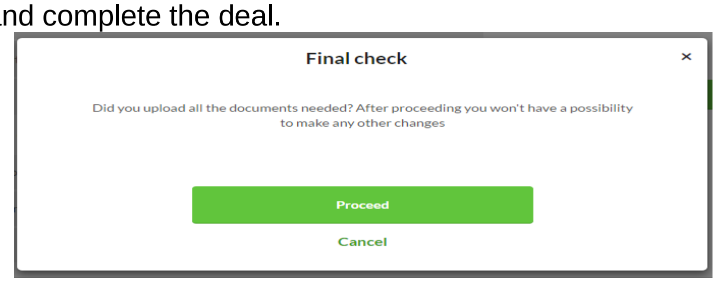
Process, Continued

Process (continued)

Step	Action
30	Contract for the customer to review and sign. Print the contract
31	When populating contracts following fields will also now be populated: Dealer name, Dealer address, Dealer phone number, Sales Representative name, Preferred install date **Rental:** Representative: Sales Rep — Preferred Install Date & Time: 02/17/2017 **Loan:** ABOUT THE DEALER DEALER'S NAME & ADDRESS: 8 Hiscott Street, St Catherines, ON, L2R 1C6 PHONE NO.: 9056847941 I confirm that (1) I have reviewed and verified the identity of the purchaser(s) by means of Government issued identification which is the same as noted above and that such identification is genuine and that of the borrower(s) and (2) that I witnessed the signing by the borrower(s) of this application and agreement. Dealer Representative Signature: X ______ Representative Name: X Sales Rep (April, 2016)
32	Once the customer has signed the contract return to your deals dashboard by clicking on ‘Home Page’ or ‘My Deals’ in the Menu of your portal
33	Click on the edit icon next to the deal that you wish to upload the contract to
34	You will be directed to the Funding Checklist page, scan the contract, click on the green ‘Upload’ icon and browse for your contract to be uploaded **Funding Checklist** * – Mandatory documents Signed contract * Signed Installation certificate * Invoice * Copy of Void Personal Cheque * Upload

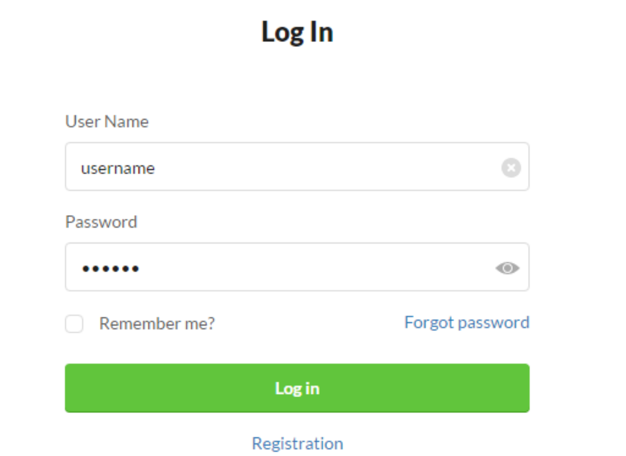
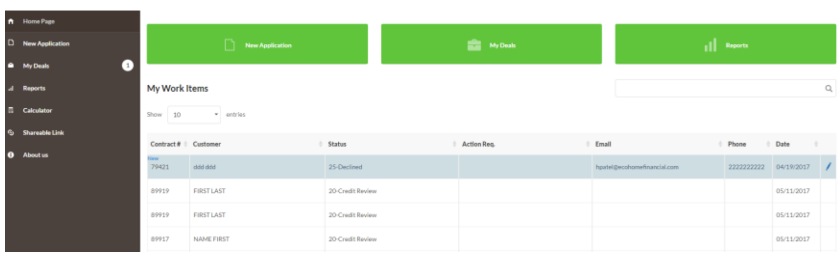
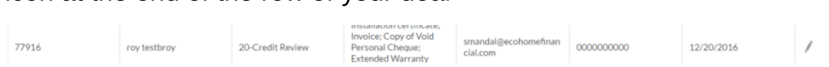
Process, Continued

Process (continued)

Step	Action
35	Complete uploading the mandatory documents: • Signed Installation Certificate • Invoice • Copy of Void Personal Cheque • You can also upload any other pertinent documents that are needed for the deal to be audited
35 (a)	After installation is complete you will be able to fill in specific information about the equipment that was installed. From the Funding Checklist page select Signed Installation Certificate, click on Download Certificate Template  Enter in installed equipment serial number (for each piece of equipment), installed equipment model (for each piece of equipment), installer first and last name and installation date. All of the fields are optional fields and not mandatory in order to print the Installation Certificate Once completed, the Installation Certificate can be uploaded into the Portal
36	Complete the upload of all of your documents, click on the Ready for Audit button when you have completed the deal and added all of your supporting documents 
37	You will be asked to confirm that the deal is ready to be audited, click proceed when to move the deal to Ready for Audit or Cancel to go back and complete the deal. 
38	The process is now complete

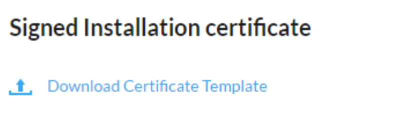
Process

Process – Uploading Documents to the Funding Checklist in the Portal

Step	Action
1	Click on the following URL: https://beta.ecohomefinancial.com/ecohome
2	Enter your user name and password on the Log In page as provided to you by your EcoHome Manager 
3	You will be directed to your Dashboard upon successful login 
4	To attach required documents to one of your contracts click on the Edit icon at the end of the row of your deal 

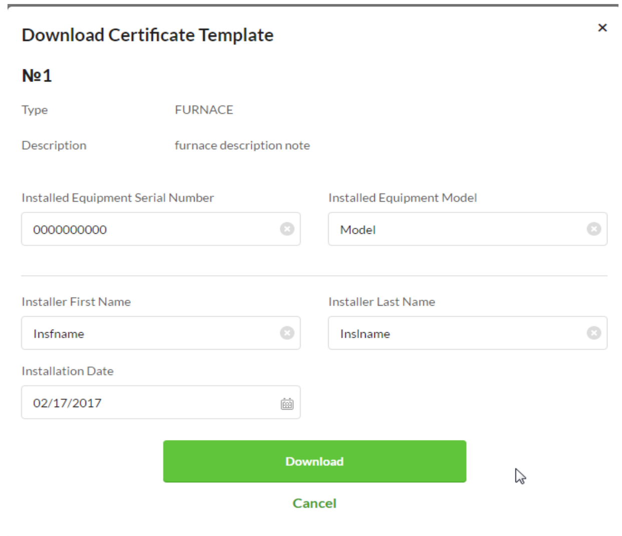
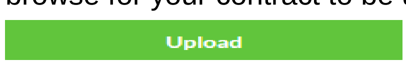
Process, Continued

Process (continued)

Step	Action
5	You will be directed to the Funding Checklist page for the deal you need to update 
6	The Signed Contract was uploaded in the previous process, continue uploading documents until all documents have been attached to your deal
7	You will be directed to the Funding Checklist page, scan the contract, click on the green 'Upload' icon and browse for your contract to be uploaded 
8	After installation is complete you will be able to fill in specific information about the equipment that was installed. 

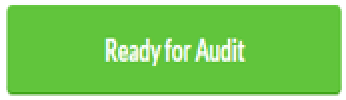
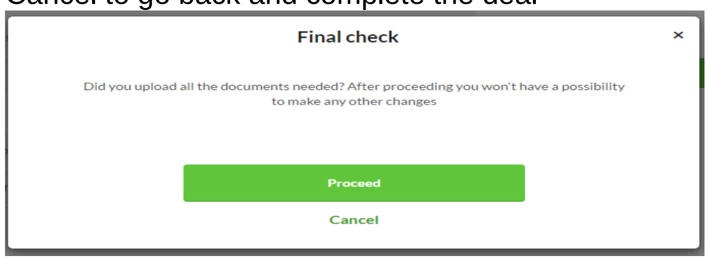
Process, Continued

Process (continued)

Step	Action
9	When you are ready to print the Installation Certificate you can enter in installed equipment serial number (for each piece of equipment), installed equipment model (for each piece of equipment), installer first and last name and installation date. All of the fields are optional   **RENTAL CERTIFICATE OF COMPLETION** You, the customer, hereby acknowledge the installation of the equipment as described on the Ecohome Financial Contract identified by the Application Approval Number listed below between Ecohome Financial Inc. and the customer. I hereby acknowledge the goods and services provided are satisfactory and suitable for my purposes and I authorize Ecohome Financial Inc., to pay to the Dealer above the amount financed as disclosed on the Ecohome Financial Contract. Once executed, this certificate supplements, but does not alter, construe or amend the terms of the Rental Agreement between us and you, the customer. Signed on ______, ______, 20____ APPLICATION # CUSTOMER NAME: day snow (print name) ______ (signature) RELATIONSHIP TO CUSTOMER: Customer ☐ Spouse ☐ Other ______ INSTALLER NAME: Inslname Insfname (print name) ______ (signature) NEW EQUIPMENT ------PLACE EQUIPMENT SERIAL STICKER HERE------
10	Scan the Installation Certificate, click on the green 'Upload' icon and browse for your contract to be uploaded 

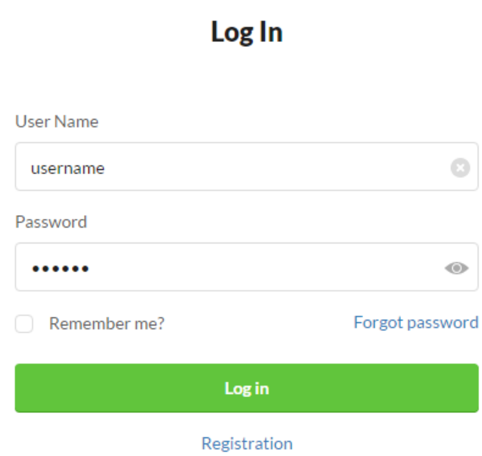
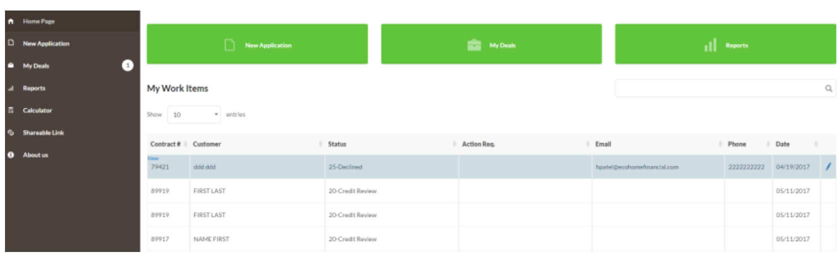
Process, Continued

Process (continued)

Step	Action
11	When you have completed the upload of all of your documents, click on the Ready for Audit button 
12	You will be asked to confirm that the deal is ready to be audited, click Proceed when you are ready to submit the deal to be audited or Cancel to go back and complete the deal 
13	The process is now complete

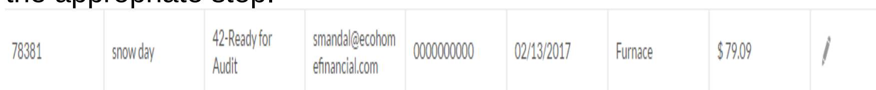
Process

Process – Editing a Deal

Step	Action
1	Click on the following URL: https://beta.ecohomefinancial.com/ecohome
2	Enter your user name and password on the Log In page as provided to you by your EcoHome Manager 
3	You will be directed to your Dashboard upon successful login 

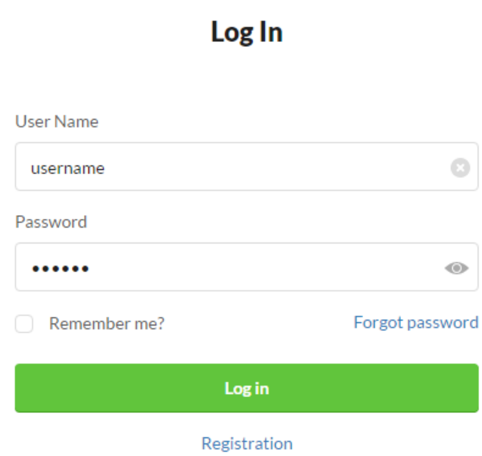
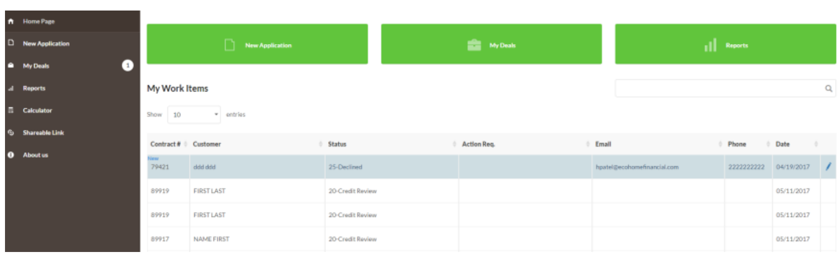
Process, Continued

Process (continued)

Step	Action
4	You are able to make more modifications to already submitted contracts: The Edit button on the contract edit page will allow you to navigate to the appropriate step. 
5	Editing the Deal Information, Equipment information, Existing Equipment Information and Additional Contract Information will redirect you to step 3 
6	Editing the Contact information and Payment information section will redirect you to step 4. 
7	After you make changes to the deal, the deal will be re-calculated and re-submitted to Aspire. You will now be able to print the updated contract.
8	The process is now complete

Process

Process- Viewing Your Dashboard

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Click on the following URL:
https://beta.ecohomefinancial.com/ecohome</td></tr>
<tr><td>2</td><td>Enter your user name and password on the Log In page as provided to you by your EcoHome Manager

</td></tr>
<tr><td>3</td><td>You will be directed to your Dashboard upon successful login

</td></tr>
</table>

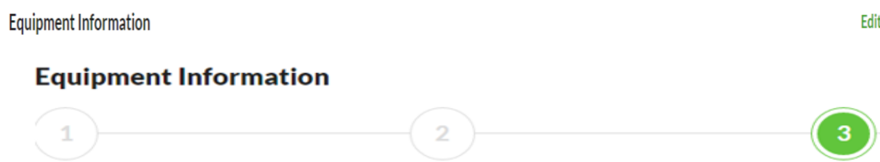
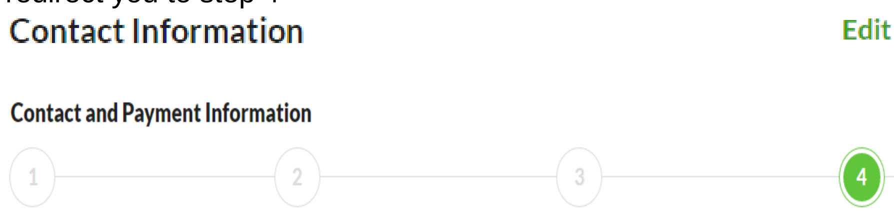
Process, Continued

Process (continued)

Step	Action
4	Your Dashboard displays the following information to you and can be filtered from any column: • Contract # • Customer • Status • Action Req • Email • Phone • Date
5	Editing the Deal Information, Equipment information, Existing Equipment Information and Additional Contract Information will redirect you to step 3 
6	Editing the Contact information and Payment information section will redirect you to step 4. 
7	After you make changes to the deal, the deal will be re-calculated and re-submitted to Aspire. You will now be able to print the updated contract to be resigned and resubmitted
8	The process is now complete

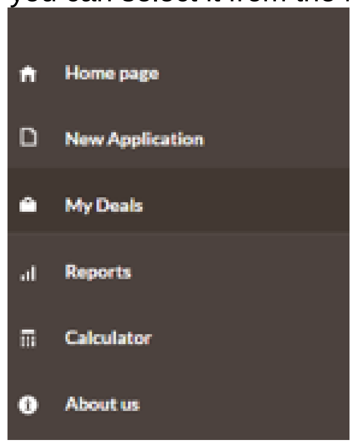
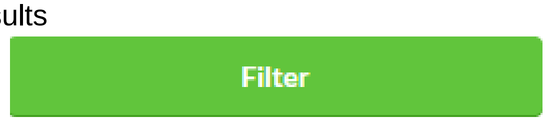
Process

Process – Editing Deals

Step	Action
1	You can make modifications to already submitted contracts as long as they are not in the following Status: • Booked • Ready for Audit
2	Editing the Deal Information, Equipment information, Existing Equipment Information and Additional Contract Information will redirect you to step 3 
3	Editing the Contact information and Payment information section will redirect you to step 4 
4	After you make changes to the deal, the deal will be re-calculated and re-submitted to Aspire. You will now be able to print the updated contract
5	After you make changes to the deal, the deal will be re-calculated and re-submitted to Aspire. You will now be able to print the updated contract
6	Dealers will have the ability to edit and/or re-submit deals submitted by Sales Reps associated with their account.

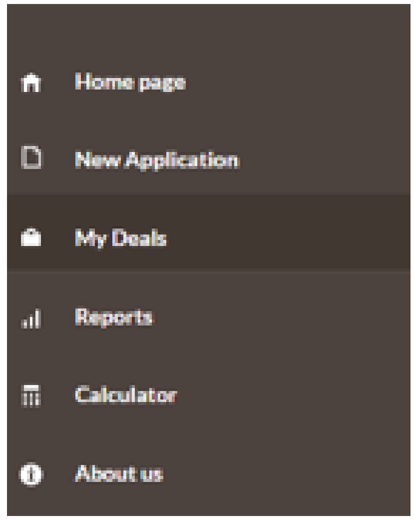
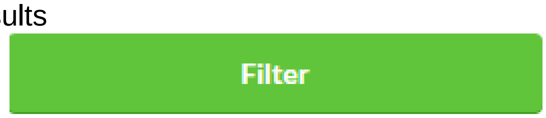
Process

Process- My Deals

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>To access My Deals, you can select it from the Main Menu
</td></tr>
<tr><td>2</td><td>In the My Deals section, you can view all your deals. You can view by the following information:
Contract #
Customer
Status
Type
Email
Phone
Date
Equipment
Sales Rep
Value</td></tr>
<tr><td>3</td><td>You can view by Deal Info or Detailed Info. You can filter your view by:
Deal Type
Date From
Date To
Deal Status
Once you have selected your criteria click the green Filter button to view your results
</td></tr>
</table>

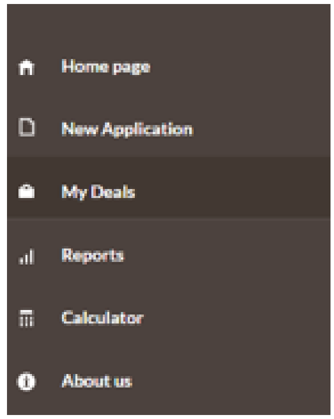
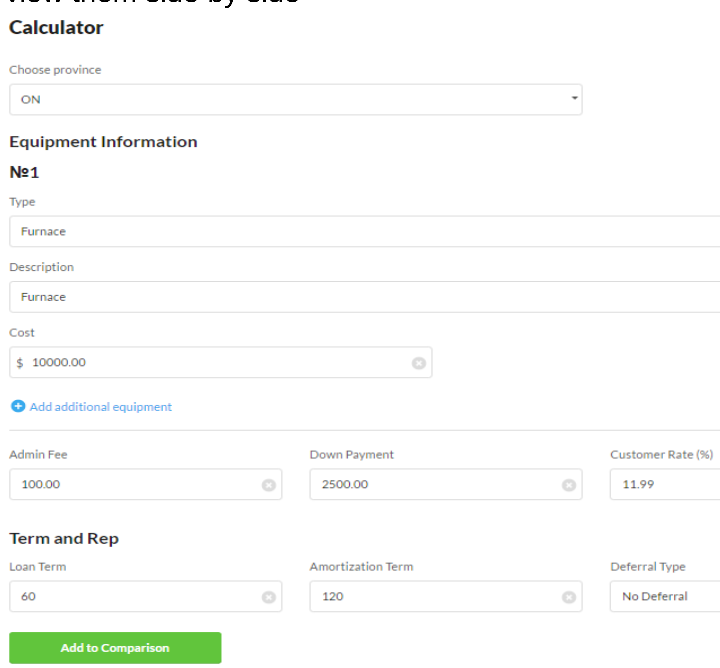
Process

Process-Reports

Step	Action
1	The Reports can be selected from the Main Menu 
2	In the Reports section, you can view Deal Info or Detail Info. You can filter your view by: • Deal Type • Date From • Date To • Deal Status Once you have selected your criteria click the green Filter button to view your results 
3	You can export all information or your filtered criteria to export, click on the green Export All to Excel button 

Process

Process- Loan Calculator

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>The Loan Calculator can be selected from the Main Menu

</td></tr>
<tr><td>2</td><td>The Calculator is similar to step 3 of creating a new deal in that you can select/enter the Province, Equipment Type, Cost, Admin Fee, Down Payment, Customer Rate, Loan Term, Amortization Fee and Deferral Type. You will be able to create up to 3 comparisons and view them side by side

</td></tr>
</table>