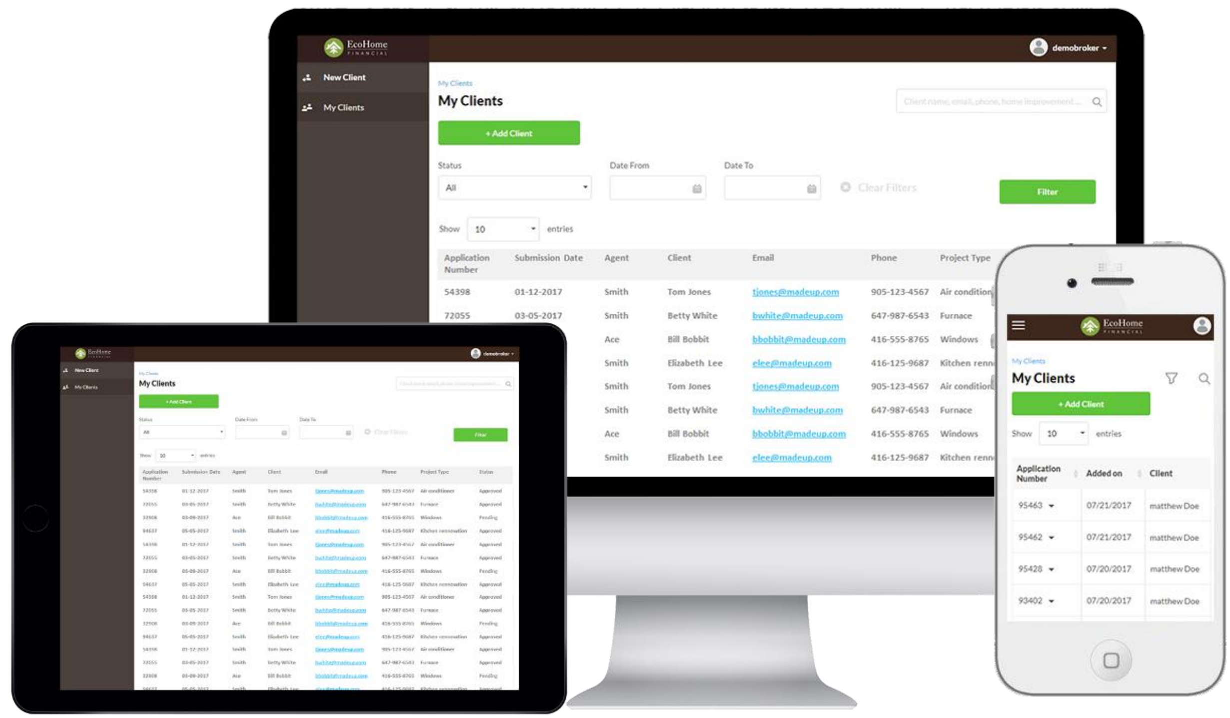
Dealer Portal



Loan User guide

May 2018 version

EcoHome
FINANCIAL

Engagement-Powered Consumer Financing

TABLE OF CONTENTS

TABLE OF CONTENTS

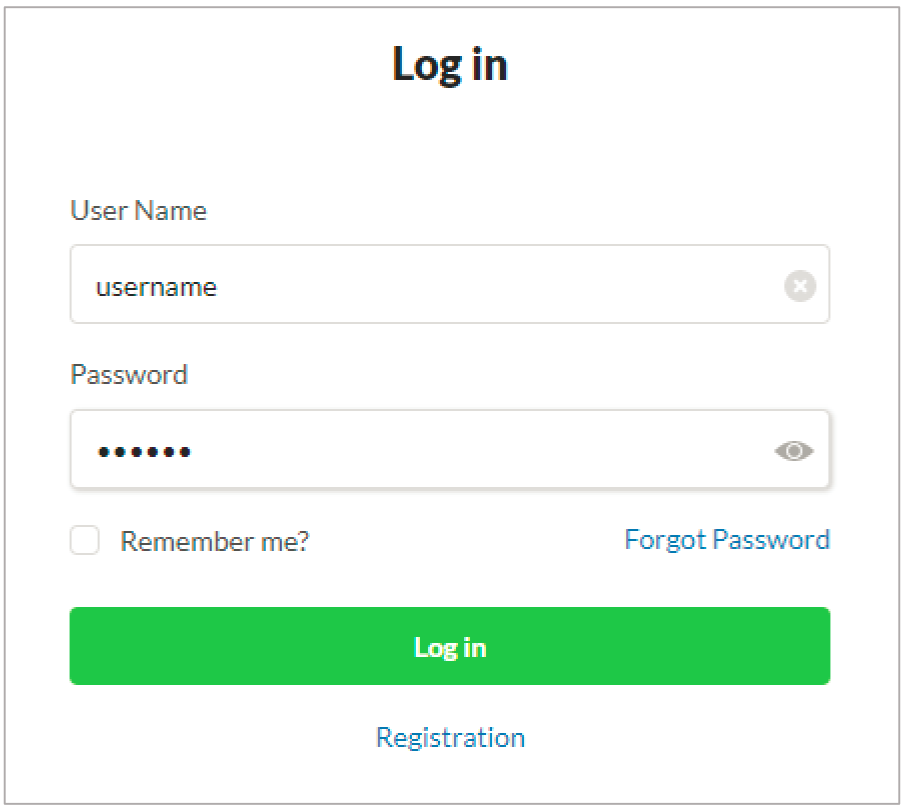
Your login credentials would have been provided to you by your Sales Account Manager. If at any time you forget your password or have locked your account you can contact Dealer Support at 1-866-382-7468 ext.3 to have it reset

STEP 1:

Visit the following URL: **https://beta.ecohomefinancial.com/ecohome**

STEP 2:

Enter your username and password on the Log In page



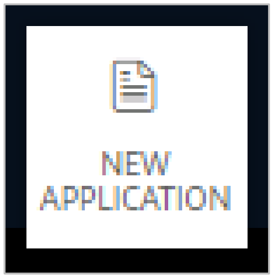
STEP 3:

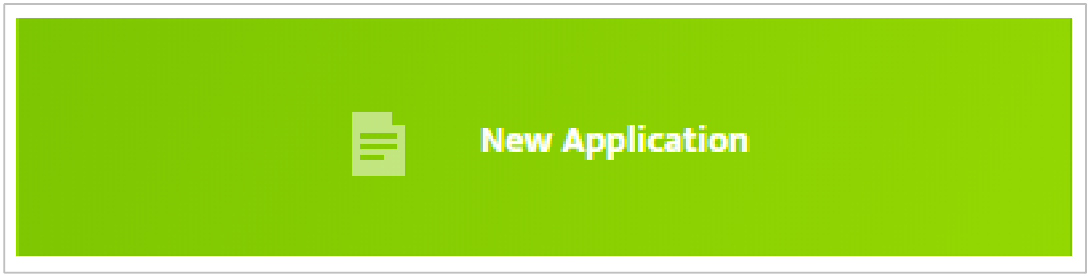
You will be directed to your Dashboard upon successful login

Contract #	Customer	Status	Action Req.	Email	Phone	Date	
110255	James Londer	Docs Received	Signed Installation Certificate; Invoice; Copy of Void Personal Cheque;	springroman+1@gmail.com	2222222222	12/07/2017	
110221	test four	Submitted		smandal@ecohomefinancial.com	0000000000	12/11/2017	
110216	Test Three	Saved	Signed Contract; Signed Installation Certificate; Invoice; Copy of Void Personal Cheque;	smandal@ecohomefinancial.com	0000000000	12/06/2017	
110215	Test Two	Credit Review	Signed Contract; Signed Installation Certificate; Invoice; Copy of Void Personal Cheque;	smandal@ecohomefinancial.com	0000000000	12/06/2017	
110193	test one	Docs Received	Signed Installation Certificate; Invoice; Copy of Void Personal Cheque;	smandal@ecohomefinancial.com	0000000000	12/06/2017	

STEP 4:

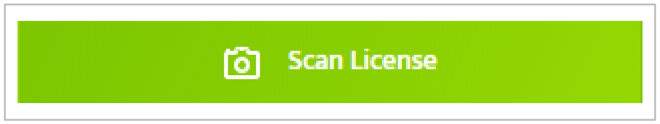
Click on ‘New Application’ in the Menu on the left side of the screen OR click on the ‘New Application’ icon at the top of the screen



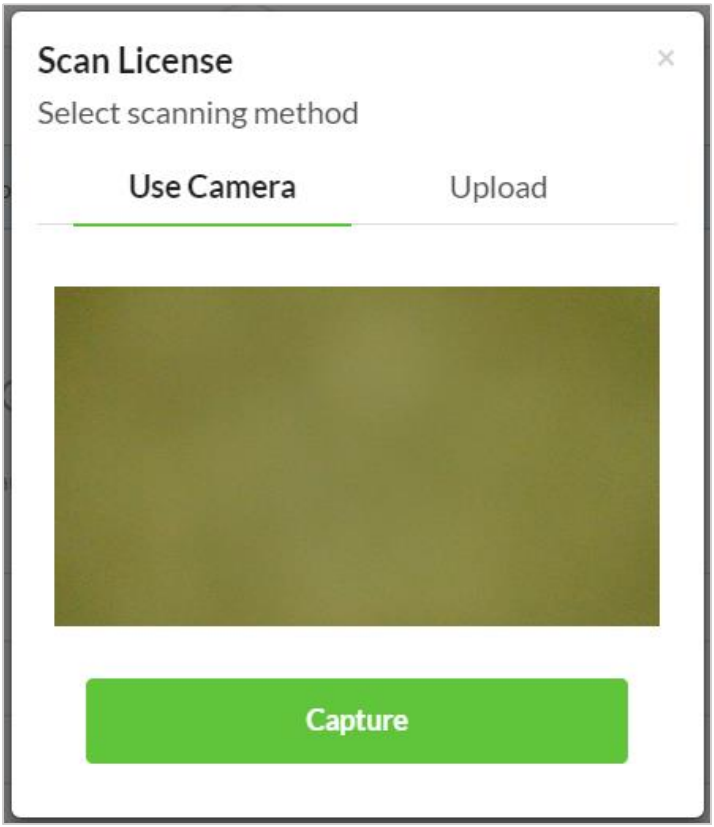


STEP 5:

Complete the Borrower Information section. Click the ‘Scan License’ button



The following will appear to allow you to capture the driver’s license barcode



Mobile users click ‘Capture’
Desktop users click ‘Upload’
Sample image of back of Driver’s License:

To scan the driver’s license, turn the license over to scan the barcode on the back of the license. Avoid any glare and turn off your flash

STEP 6:

If drivers license is not available to be scanned enter the following information in the Borrower Information section:

a) First Name
b) Last Name
c) Date of Birth
d) Customer`s Verification ID
e) Dealers Initials

STEP 7:

Complete the Installation Address Information section. If you are at the Customers home click the ‘Get My Location’ button. The Installation Address Information section will automatically populate

STEP 8:

If you are not at the Customers home enter the following information in the Installation Address Information section:

a) Address
b) Unit #
c) City
d) Province
e) Postal Code

1. At least one of the applicants must be the home owner
2. Postal code is a minimum of 5 characters and maximum of 6 characters

STEP 9:

If the Customers has lived at their current address for less than 2 years, click the check box as per below in the form to complete the Customers previous address

✓ Lived at current address less than 2 years

Enter the following information in the Previous Address Information section:

a) Street
b) Unit #
c) City
d) Province
e) Postal Code

STEP 10:

If the mailing address is different than the installation address, click the box as per below in the form to complete the Customers mailing address

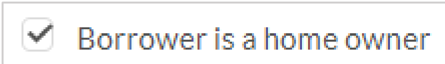
✓ Mailing address is not the same as Installation Address

Enter the following information in the Mailing Address section:

a) Street
b) Unit #
c) City
d) Province
e) Postal Code

STEP 11:

Confirm that the Customer is the Home Owner by clicking on the box as per the below in the form



If the first Customer is not the home owner you will have this option with the additional applicant

STEP 12:

If there is an additional applicant, click on the 'Add Additional applicant' icon as shown below in the form to complete the additional applicants information

Enter/complete the following information in the Additional Applicant Information section:
Scan driver's license OR enter

a) First Name
b) Last Name
c) Date of Birth
d) Customer`s Verification ID
e) Dealer`s Initial
f) Relationship to Main Borrower

STEP 13:

Before you proceed with the credit check review the Customer’s information for accuracy.

STEP 14:

The Customer must read and authorize their credit report to be pulled. This must be completed for each customer

☑ By submitting this application, you acknowledge and agree that EcoHome Financial is authorized to obtain your credit report from one or more consumer credit reporting agencies (e.g. Equifax or TransUnion), to verify the information in your credit report with third parties as necessary, and to periodically update your credit information with credit reporting agencies. You are hereby notified that a consumer report containing credit and/or personal information may be referred to in connection with this application. You consent to accept, receive and use in electronic form any and all agreements, notices, disclosures and other documents or information in relation to this application that EcoHome Financial may deliver to you. *

How is my personal data used?   Privacy policy

The Customer has the ability to view `How is my personal data used?’ and ‘Privacy Policy’

STEP 15:

Click on the ‘Save and Proceed’ button at the bottom of the page to move to the next step – the Customers information is now created

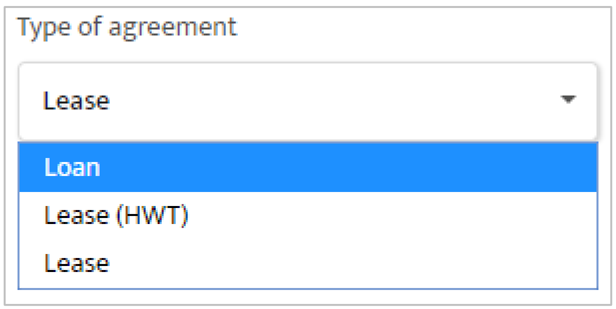
STEP 16:

At this point at the top of the page you will see a response from the credit check. You will receive one of the below response messages:

- Credit Check Processed Successfully – Pre-approved amount will display
- No Message – this application will proceed for credit review
- We were not able to match the Customer's credit details. Please ensure that the Customer information provided matches their Government issued ID (e.g. driver's license). Continue with the application for credit adjudication upon submission.
- Declined

STEP 17:

Select the 'Type of Agreement' from the drop-down menu



STEP 18:

Enter/complete the following information in the New Equipment Information section:

a) Type – select equipment/service from drop down menu
b) Description – complete this free form field
c) Cost – enter the cost of the equipment/service including taxes for loans
e) Add additional equipment – if required
f) Down Payment – if required
g) Financing Options – click select from one of the options to assign the rates to the deal
h) Admin Fee

STEP 19:

Enter/complete the following information in the Financing Options section:

a) Deferral Type – select if required
b) Loan/Amortization Term
    a) Click select to save your selected Financing Option
c) Sales Rep – Enter Sales Representative name
d) Select Preferred Install Date
e) Select Preferred Install Time
e) Enter house size (in sq. feet)

STEP 20:

Complete the Existing Equipment Information section if required

STEP 21:

Complete the Contract Notes section if needed

STEP 22:

Click on the 'Save and Proceed' button at the bottom of the page to move to the next step – the Equipment information has now been added to the application

STEP 23:

Enter/complete the Contact Information section for the Borrower:

a) Enter Home phone number
b) Enter Cell phone number
c) Enter Business phone number
d) Enter email address

STEP 24:

If the Customer would like to receive electronic messages from EcoHome Financial, check the box next to the consent

☑ By checking this box, you consent to receive commercial electronic messages from EcoHome Financial at your email address and telephone number(s) provided by you in this application or from time to time in connection with your account, including electronic communications that market or promote our programs, products, services, offers, events and surveys that may be of interest to you. You may withdraw this consent at any time. You may contact EcoHome Financial Inc. at 325 Milner Avenue, Suite 300, Toronto, Ontario M1B 5N1 | www.ecohomefinancial.com.

STEP 25:

If there is an additional applicant on the application, complete the Additional Applicant Information section:

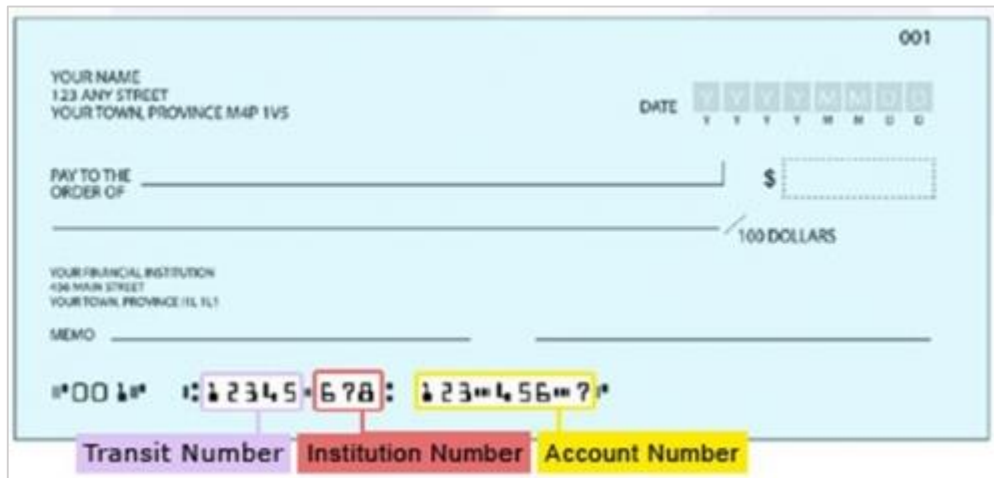
a) Enter Home phone number
b) Enter Cell phone number
e) Enter Business phone number
f) Enter email address

If the Additional Applicant would like to receive electronic messages from EcoHome Financial, check the box next to the consent

STEP 26:

Complete the following information in the Payment Information section:

a) Payment Type – select from the drop down menu
   i. If Enbridge is selected enter Enbridge Gas Distribution Account number or Meter #
   ii. If PAD is selected enter Preferred Withdrawal Date, Bank Number, Transit Number and Account Number



STEP 27:

Click on the 'Save and Proceed' button to move to the next step

STEP 28:

You are now at the 'Summary and Confirmation'. You can review all information for accuracy and click on the 'Edit' icon in any section in order to return to that page to make any corrections

STEP 29:

Once all information is complete and accurate, click on the 'Submit Deal' button

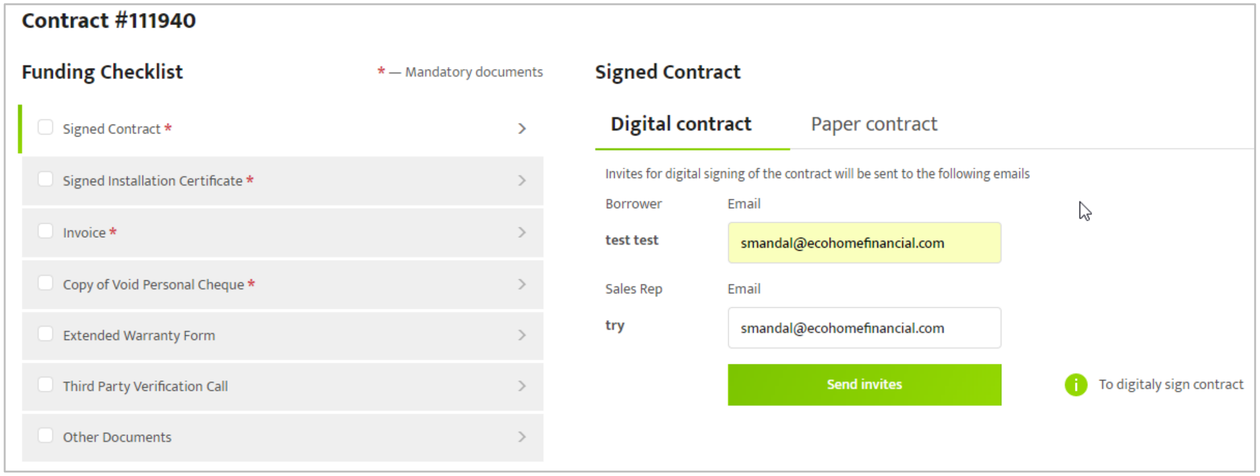
STEP 30:

This process is complete. You can now send the contract for E-Signature or print the contract

You can't proceed from Step 1 to Step 2 until all applicants agree to send their personal data to credit check

STEP 1:

Review Borrower(s) and Sales Rep email addresses are correct and Click on the 'Send Emails' button

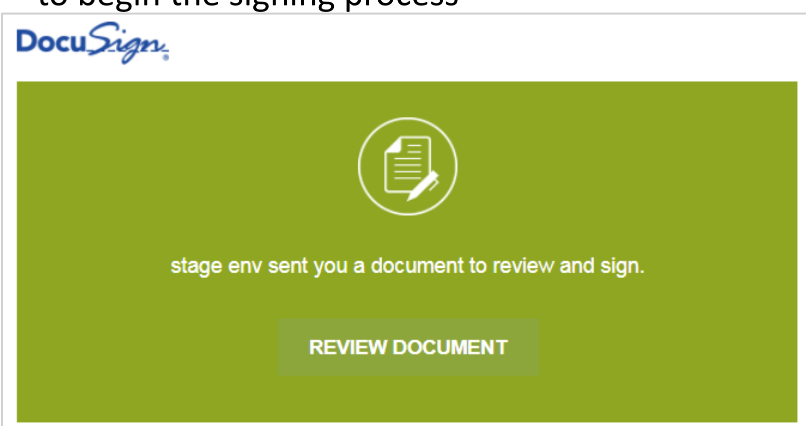


STEP 2:

Email will be sent to Borrower, Co-Borrower (if one is present) and Dealer in that order

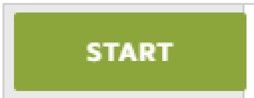
STEP 3:

Borrower one opens the email and review the message from EcoHome Financial and clicks REVIEW DOCUMENT to begin the signing process



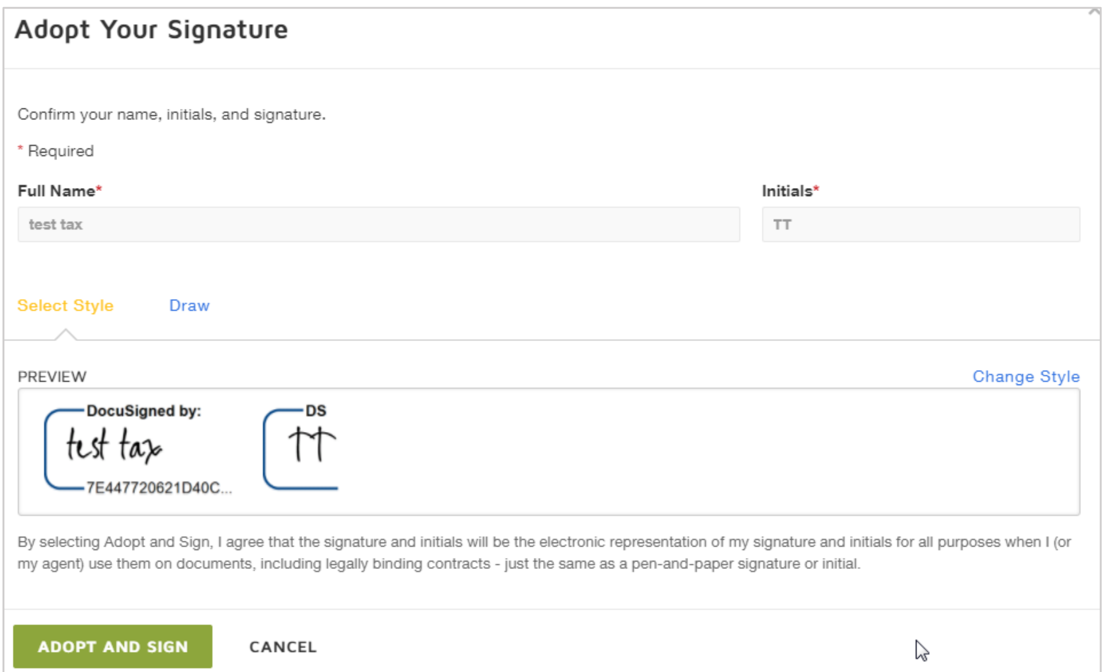
STEP 4:

Borrower one clicks the START tag on the left to begin the signing process. They are taken to the first field requiring action. Click the SIGN tag. You are asked to Adopt and Sign. You also have the ability to DRAW signature



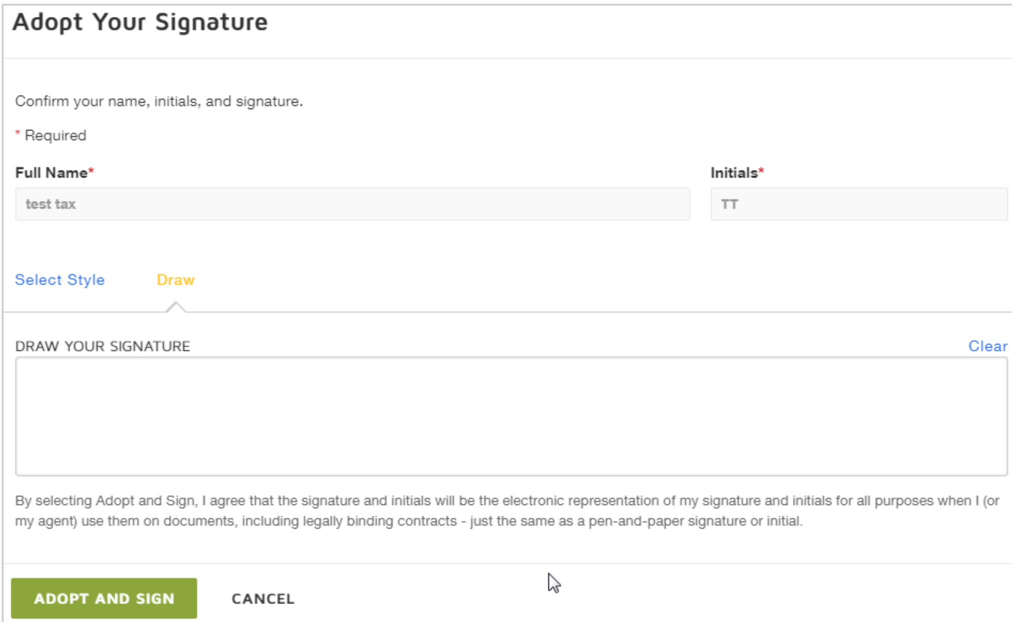
STEP 5:

Borrower verifies their name and initials are correct when using Adopt and Sign. If not, change them as needed



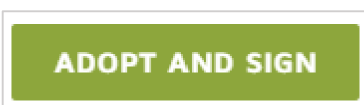
STEP 6:

Borrower does one of the following:
> Accept the default signature and initial style
> Click Draw. Draw your signature using a mouse, your finger or a stylus



STEP 7:

Borrower clicks ADOPT AND SIGN to adopt and save their signature information and return to your document



STEP 8:

When the borrower is finished clicking all signature tags in the document, confirm signing by clicking FINISH

STEP 9:

Once the Borrower has completed signing, the Co-borrower (if present) is notified by email and completes step 3-8.

STEP 10:

Once all Borrowers have completed signing, the Dealer is notified by email and completes step 3-8.

STEP 11:

All parties will receive a copy of the completed contract

STEP 12:

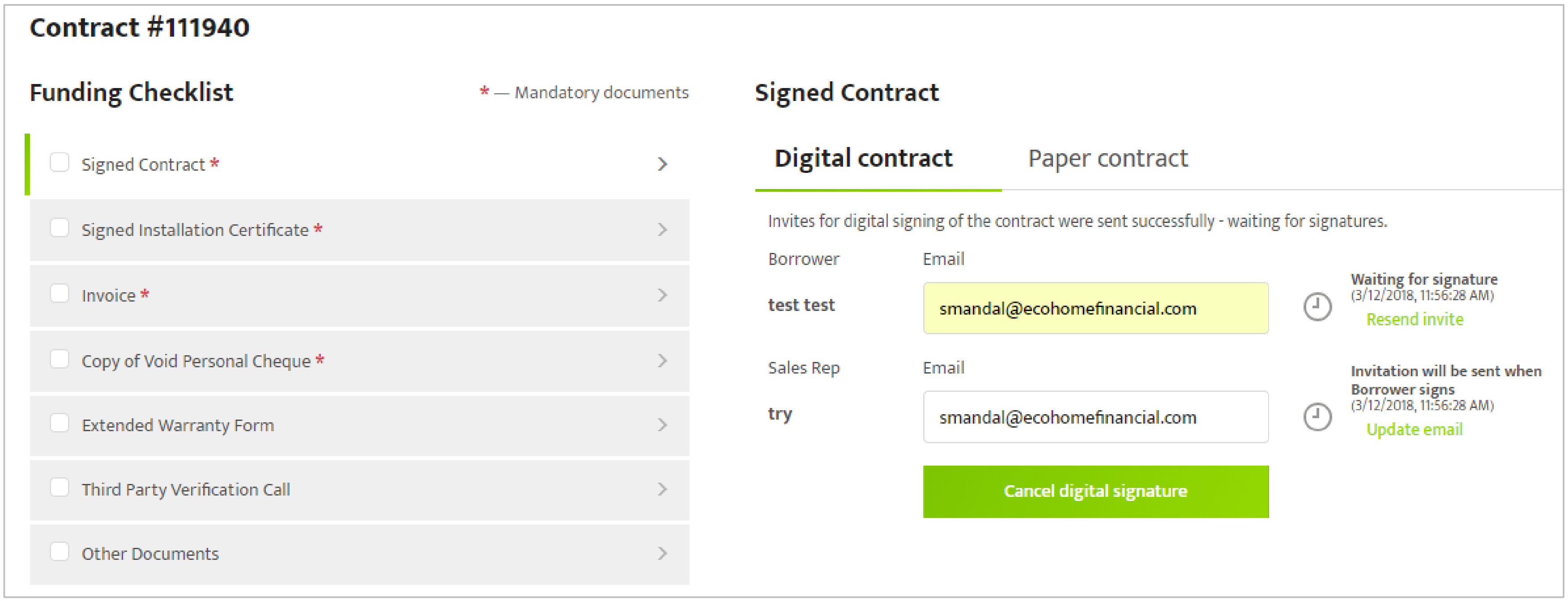
Contracts will be automatically uploaded to the Dealer Portal’s Funding Checklist under Signed Contract

STEP 13:

This process in now complete. You can proceed to uploading documents to the Funding Checklist

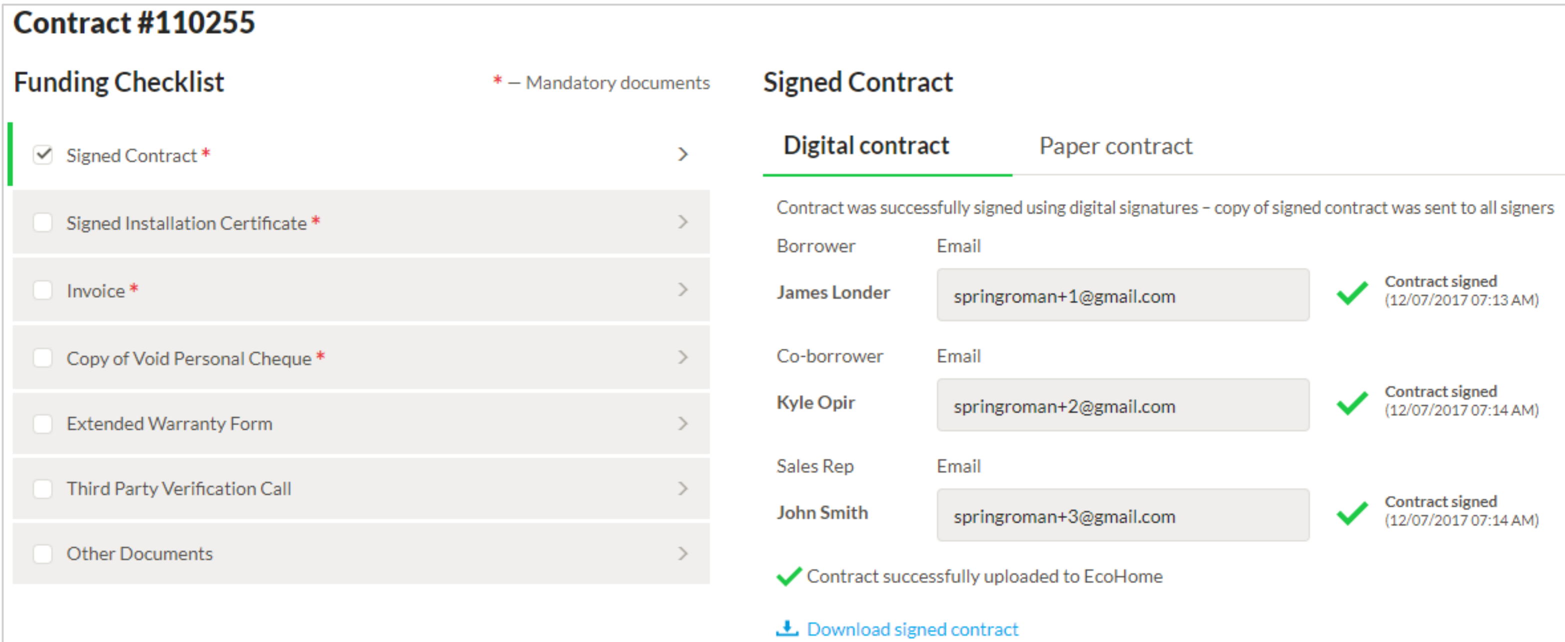
STEP 14:

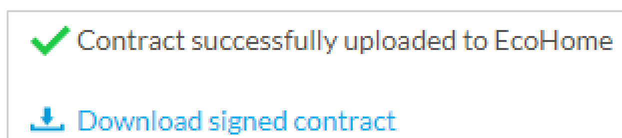
If contracts need to be resent for signing, this can be done from the Funding Checklist.
If contracts sent for digital signature need to be cancelled, this can be done from the Funding Checklist.



STEP 1:

Once a contract has been successfully signed by all parties, you can download a copy of the contract from the Funding Checklist.





STEP 1:

You can review the status of contract sent for E-Signature from the Home Page or My Deals Page. A digital signature icon can be found next to each deal status for any deal that has a contract sent for E-Signature.

Contract #	Customer	Status	Action Req.	Email	Phone	Date
110255	James Londer	Docs Received	Signed Installation Certificate; Invoice; Copy of Void Personal Cheque;	springroman+1@gmail.com	2222222222	12/07/2017
110221	test four	Submitted		smandal@ecohomefinancial.com	0000000000	12/11/2017
110216	Test Three	Saved	Signed Contract; Signed Installation Certificate; Invoice; Copy of Void Personal Cheque;	smandal@ecohomefinancial.com	0000000000	12/06/2017
110215	Test Two	Credit Review	Signed Contract; Signed Installation Certificate; Invoice; Copy of Void Personal Cheque;	smandal@ecohomefinancial.com	0000000000	12/06/2017
110193	test one	Docs Received	Signed Installation Certificate; Invoice; Copy of Void Personal Cheque;	smandal@ecohomefinancial.com	0000000000	12/06/2017

STEP 2:

To view the contract status, click on the E-Signature icon and review the details presented in the pop-up box.

Sample 1:

Digital Signature Status

Borrower	Email	
Test Two	smandal@ecohomefinancial.com	Waiting for signature (12/06/2017 11:16 AM)
Sales Rep	Email	
Sales rep	smandal@ecohomefinancial.com	Invitation will be sent when Borrower signs (12/06/2017 11:16 AM)

Go to contract details

Sample 2:

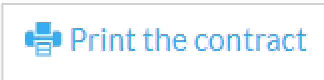
Digital Signature Status

Borrower	Email	
James Londer	springroman+1@gmail.com	Contract signed (12/07/2017 07:13 AM)
Co-borrower	Email	
Kyle Opir	springroman+2@gmail.com	Contract signed (12/07/2017 07:14 AM)
Sales Rep	Email	
John Smith	springroman+3@gmail.com	Contract signed (12/07/2017 07:14 AM)

Go to contract details

STEP 1:

Click on the ‘Print the contract’ icon



STEP 2:

The contract will be auto-populated with all of the application details from the portal

STEP 3:

Have the applicant(s) review and sign the contract

STEP 4:

This process is now complete. You can proceed to uploading documents to the portal

(See next page for sample of an auto-populated contract)

PRINTING THE CONTRACT

EcoHome FINANCIAL

325 Milner Avenue, Suite 300, Toronto ON M1B 5N1
Phone: 1-866-382-7468 | Fax: 1-877-689-3863
Website: www.ecohomefinancial.com
Email: info@ecohomefinancial.com

CREDIT APPLICATION and LOAN AGREEMENT

ABOUT THE BORROWER (Registered Owner of the Property)

Last Name:	First Name:		Middle Initial:	Home Phone:	Cell Phone:
Installation Address:	Unit Number:	City:		Province:	Postal Code:

☐ Previous Address (If not at current address for at least two years):
☐ Mailing Address (If different from Installation Address):

Date of Birth (mm/dd/yyyy):	E-mail Address:
Dealer confirms they have verified the Borrower's ID: _______ (Dealer's Initials)	Type of identification verified by Dealer: Driver's license: ☐ or Other: ☐ Please specify other type:

ABOUT THE CO-BORROWER

Last Name:	First Name:	Relationship to Borrower:	
Date of Birth (mm/dd/yyyy):	E-mail Address:	Home Phone:	Cell Phone:
Dealer confirms they have verified the Borrower's ID: _______ (Dealer's Initials)	Type of identification verified by Dealer: Driver's license: ☐ or Other ☐ Please specify other type:		

PAYMENT INFORMATION (Select One Only)

☐ **OPTION 1 – Pre-Authorized Debit (PAD)**	☐ **OPTION 2 – Enbridge gas distribution bill** — **FOR ONTARIO RESIDENTS ONLY**
Please Select PAD Date	Enbridge Account #
☐ 1st OR ☐ 15th	
Please attach a "VOID" cheque with this Agreement. By selecting this method of making your monthly payments, you are granting us the authority to debit the bank account specified on the cheque. Please review the Pre-Authorized Debit Section in the terms and conditions of this agreement for further details.	EcoHome Financial Inc.'s charges will appear on the other companies section of your Enbridge Gas Distribution bill. These offers and claims are made by EcoHome Financial Inc. alone. **EcoHome Financial Inc. is not owned by or affiliated with Enbridge Inc. or Enbridge Gas Distribution.** You agree to switch to PAD if we discontinue billing through Enbridge.

ABOUT THE EQUIPMENT / COLLATERAL (And as may be further described on the invoice for the purchase and sale of the equipment)

QUANTITY	EQUIPMENT DESCRIPTION (including make, model and serial number)

LOAN DISCLOSURE

1	Dealer Invoice Amount		7B	Annual Percentage Rate ("**APR**") (%)	
2	Down Payment		8	Monthly Payment	
3	Administrative Fee		9	Total of all Monthly Payments (5 x 8)	
4	Total Amount Financed (1 – 2 + 3)		10	Balance Owing at End of Monthly Payments (end of term residual)	
5	Term (in months)		11	Total Obligation (9 + 10)	
6	Amortization Period (in months)		12	Total Cost of Borrowing (11 – 4 + 3)	
7A	Annual Interest Rate (%)		13	Deferral Option: ☐ Yes ☐ No If no, Interest accrues from the Start Date Months (Deferral Period) ________ If yes, Interest accrues from Deferral End Date	

By signing this credit application below, you are applying for a loan on the terms and conditions on the face page of this Agreement, including the Loan Disclosure, and on the Terms and Conditions document either attached or printed on the reverse of this Agreement. Once this credit application and loan agreement is accepted by EcoHome Financial Inc. all of these terms become the terms of a loan agreement between you and us (the "**Agreement**"). You acknowledge that you have received copies of this application and loan agreement including the Loan Disclosure and the attached Terms and Conditions and that we may rely on all the terms of this Agreement, including the grant of security in Section 4 of the Terms and Conditions, if we make a loan to you. If there is a Co-Borrower, you both acknowledge that the obligations in this Agreement are joint and several, meaning that, among other things, we can seek payment from either or both of you. You certify that the information on this application form is true, correct and complete. You authorize us to collect, use and disclose your personal information (as provided above) for the purposes identified below and in the Terms and Conditions. You authorize us to make inquiries of others regarding your credit and further authorize any credit rating agency, any other company or person with whom you have a financial relationship and your employer to disclose financial information about you to us. You declare that you are not acting on behalf of any other person and there are no beneficial owners of the Property other than you.

CREDIT APPLICATION AND LOAN AGREEMENT ACCEPTANCE AND SIGNATURES

Dealer Legal Name:		Contract Date: You signed this Contract in (City / Town) ______________
Tel:	Salesperson Name:	this __________ day of ______________________, 20______
Dealer / Salesperson Signature:	Borrower's Signature:	Co-Borrower's Signature:
FOR OFFICE USE ONLY	Approval #:	

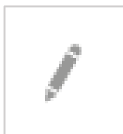
EH Loan Agreement (All provinces excluding QC) Admin Fee v2018-03-12 — Page 1 of 2

STEP 1:

Return to your Dashboard or My Deals Page

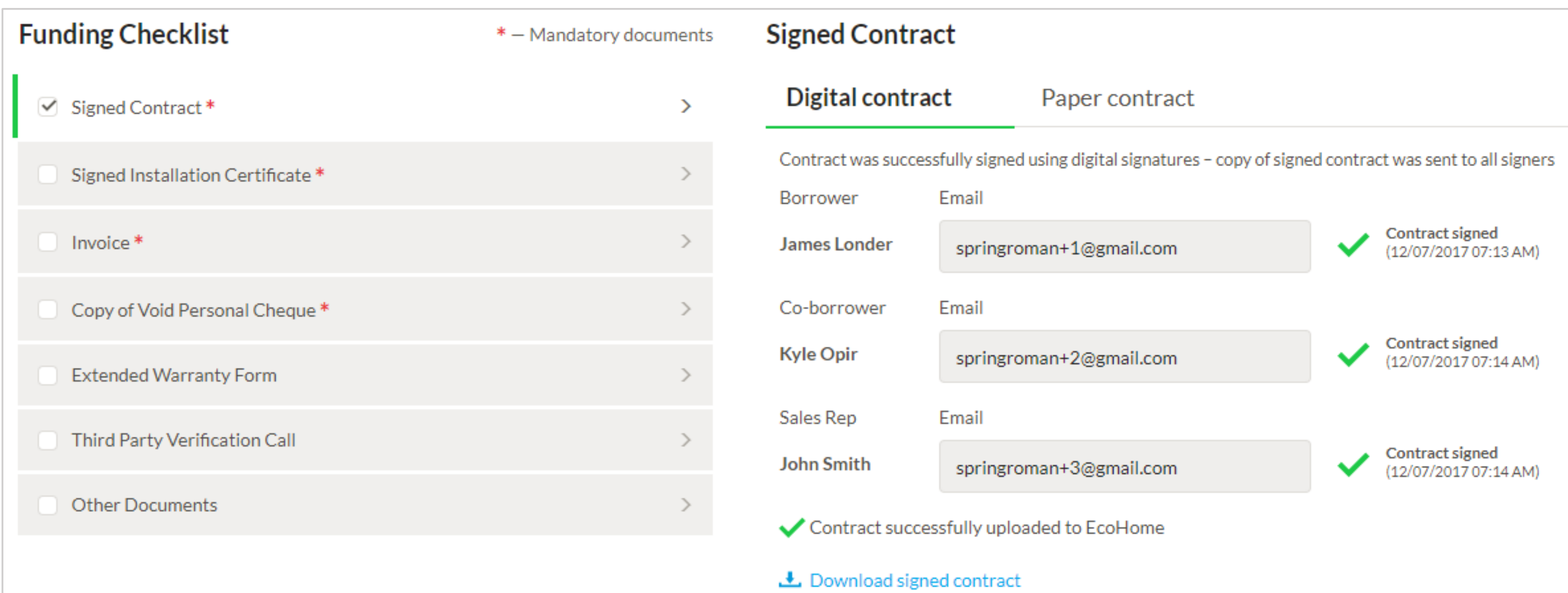
STEP 2:

To upload documents to your deal, click on the ‘Edit’ icon at the end of the row of the deal



STEP 3:

You will be directed to the ‘Funding Checklist’ page



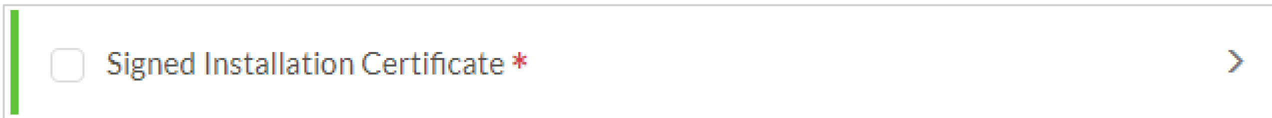
STEP 4:

Save all of your documents that are required to be uploaded to your computer. The preferred file types are .PDF and .JPEG

STEP 5:

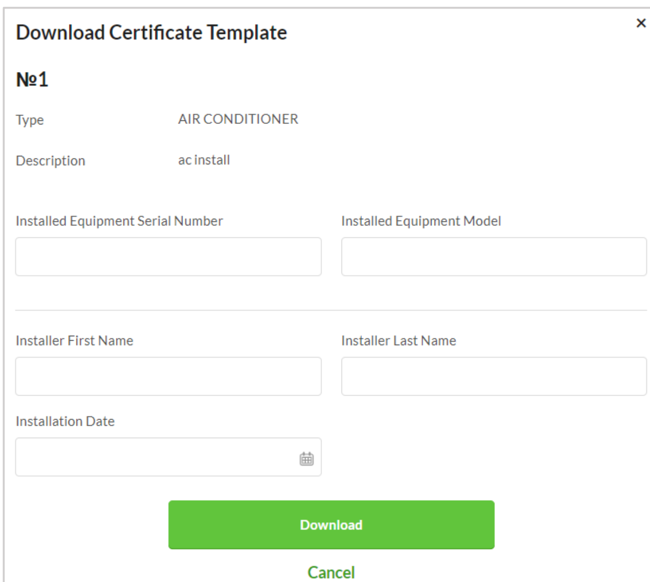
You can download a pre-filled copy of the Installation Certificate to be used at the time of installation

a) Click on the ‘Signed Installation Certificate’ bar in the Funding Checklist



b) Click on ‘Download Certificate Template’

c) Enter as much information into the fields that is available to you



d) Click ‘Download’

STEP 5 cont'd:

e) The Certificate of Completion is presented to be printed ***(Sample of auto-populated certificate of completion)***

EcoHome FINANCIAL FOR A BETTER TOMORROW

CERTIFICATE OF COMPLETION - LOAN

CUSTOMER INFORMATION		
Customer Name: User User		Telephone: 0000000000
Address: 325 Milner Avenue		Suite No:
City: Toronto	Province: ON	Postal Code: M1B5n1
Dealer Name: Dealer Dealer		
Installer Name: Last First	Loan Application Approval Number:	

I hereby acknowledge the installation of the equipment as described on the EcoHome Financial Loan Contract identified by the Loan Application Approval Number listed above between EcoHome Financial Inc. and 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 Loan Agreement between us and you, the customer.

Date of Installation (MM/DD/YYYY):	07/22/2017	
Installer Signature:		Signature Required
Confirmation Signature:		Signature Required
Relationship to Customer:	☐ Customer ☐ Parent ☐ Spouse ☐ Other:	

Fax to 1-855-233-8236

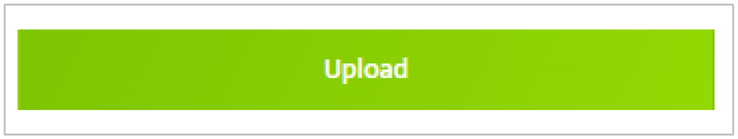
This financing program is provided exclusively by EcoHome Financial Inc.

STEP 6:

To upload documents to your deal, click on any bar that you wish to upload the document to

STEP 7:

Click ‘Upload’



STEP 8:

Select the document you wish to upload, click open to select the file

STEP 9:

Continue steps 7 and 8 until you have uploaded all of the documents

STEP 10:

This process is now complete

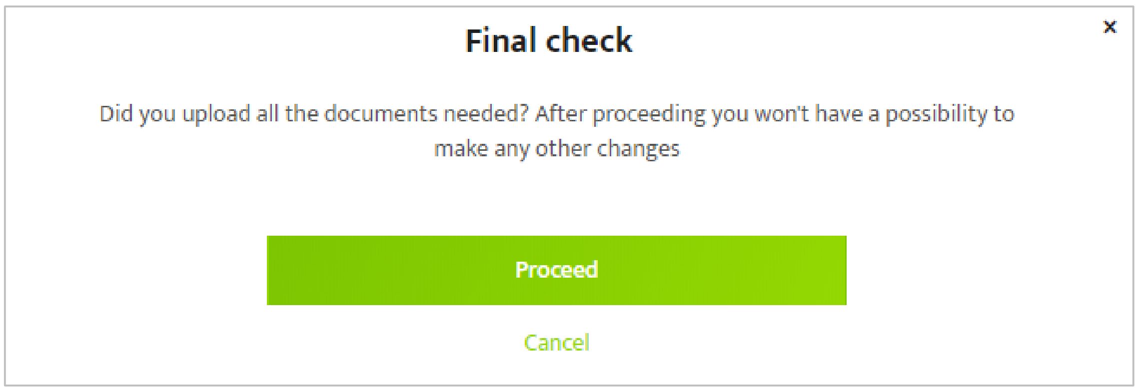
STEP 1:

Once all documents have been uploaded, click on the ‘Request to Fund’ button

This button only becomes active once all of the mandatory documents have been uploaded

STEP 2:

You will be presented with a final check pop-up message to confirm that you wish to submit the deal for funding



STEP 3:

Click ‘Proceed’ to submit the deal for funding or ‘Cancel’ to go back to the Funding Checklist

STEP 4:

This process is now complete

STEP 1:

You can make modifications to already submitted contracts as long as they are not in the following Status:

- Booked
- Ready for Audit
- Cancelled
- Expired

STEP 2:

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. You can also click on the Contract # to edit the deal

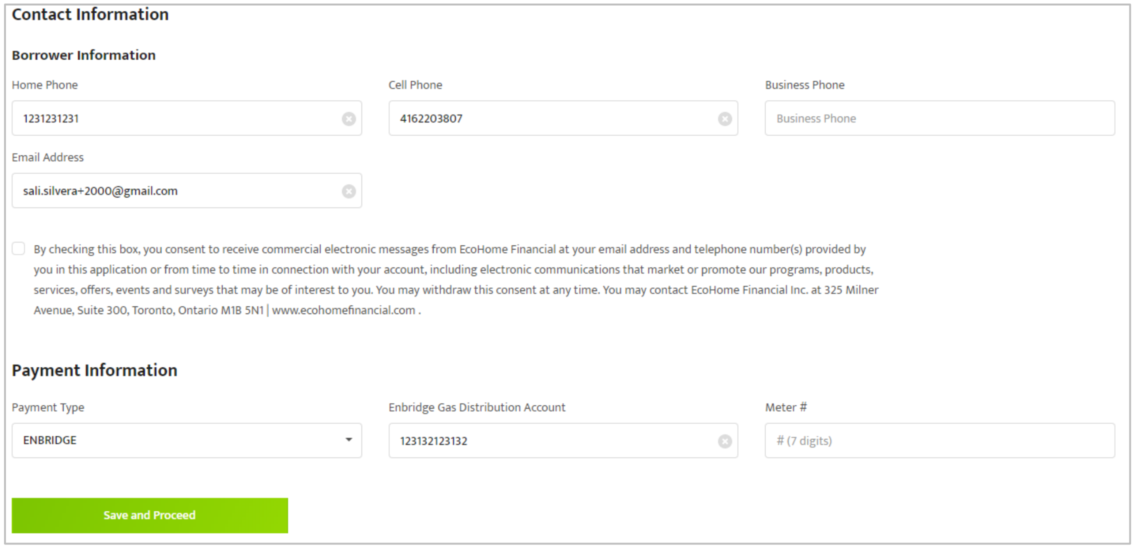
110255	James Londer	Docs Received	Loan	springroman+1@ gmail.com	2222222222	12/06/2017	Air Conditioner, Air Handler	John Smith	$ 9160.00	

STEP 3:

Editing the Equipment information and Existing Equipment Information will redirect you to step 2

STEP 4:

Editing the Contact information and Payment information section will return you to step 4 to make edits



STEP 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 resend the contract for e-signature or print the updated contract

STEP 6:

Dealers will have the ability to edit and/or re-submit deals submitted by Sales Reps associated with their account

STEP 7:

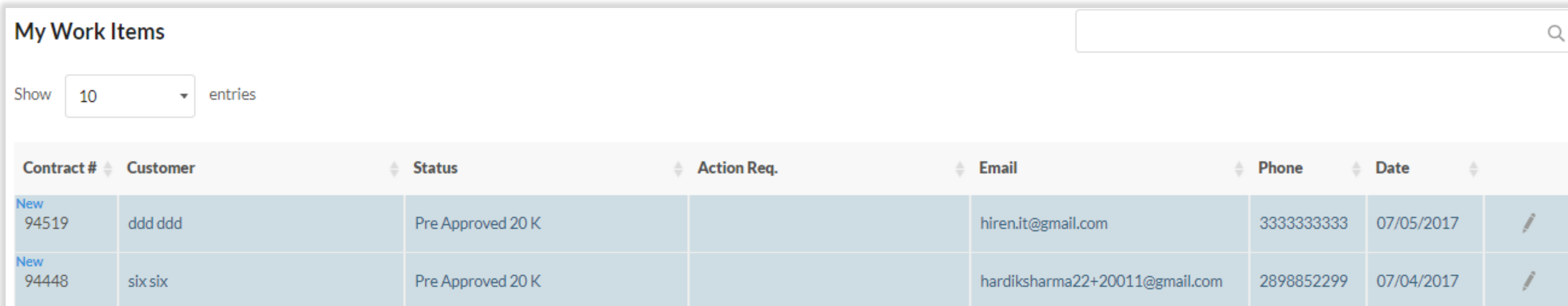
The process is now complete

STEP 1:

Upon logging into the portal, you will be directed to your “My Work Items’ view or Dashboard

STEP 2:

This page is filtered to show any ‘New’ deals from Customer Link and accepted ‘Leads’ to the top of all the deals, highlighted gray with a ‘New’ icon next to the Contract #


My Work Items

Show 10 entries

Contract #	Customer	Status	Action Req.	Email	Phone	Date	
New 94519	ddd ddd	Pre Approved 20 K		hiren.it@gmail.com	3333333333	07/05/2017	
New 94448	six six	Pre Approved 20 K		hardiksharma22+20011@gmail.com	2898852299	07/04/2017	

STEP 3:

The My Work Items view displays the following information and can be filtered from any column:

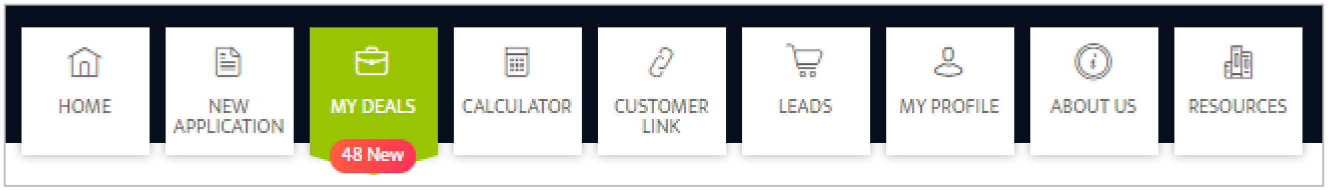
- Contract #
- Customer (name)
- Status (of deal)
- Action Req. (of deal)
- Email (of customer)
- Phone (of customer)
- Date (deal created)

STEP 4:

From the Dashboard you can click the ‘Edit’ button or Contract # on any deal in order to view/edit or upload documents to the deal

STEP 1:

To access My Deals, you can select it from the Main Menu



STEP 2:

In the My Deals section, you can view all your deals. You can view by the following information:

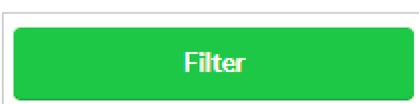
- Contract #
- Customer
- Status
- Type
- Email
- Phone
- Date
- Equipment
- Sales Rep
- Value

STEP 3:

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



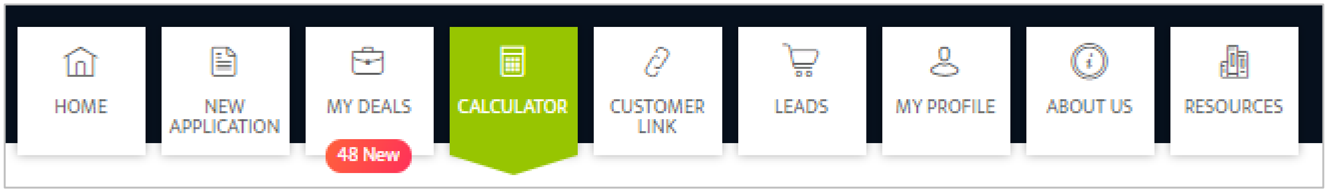
STEP 4:

You can export all information or your filtered criteria to export, click on the green Export All to Excel button

Export All to Excel

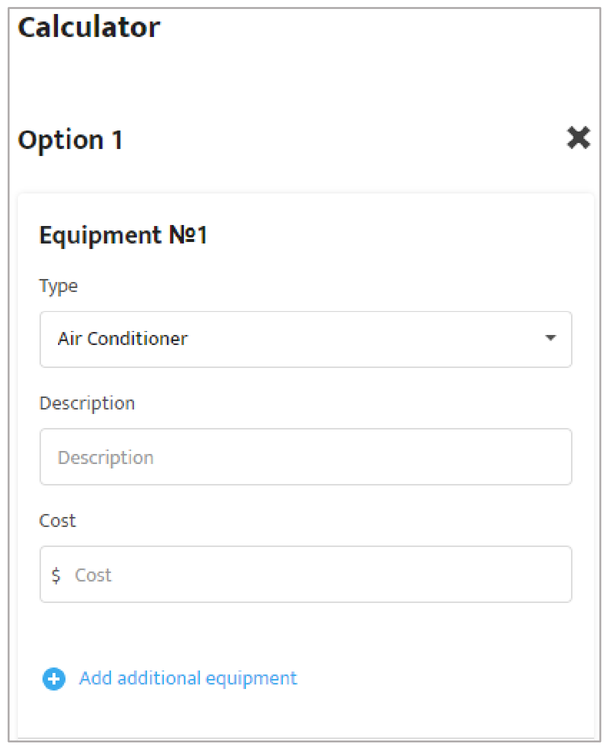
STEP 1:

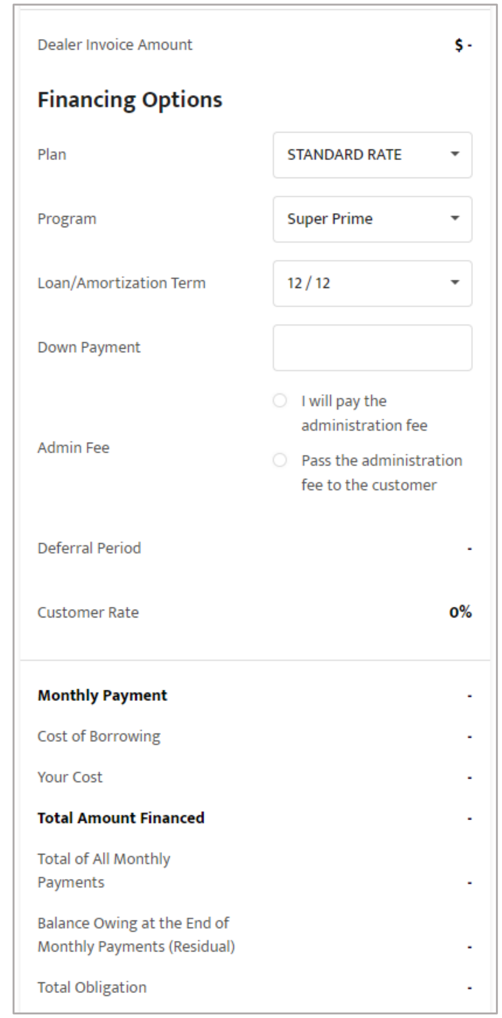
The Calculator can be selected from the Main Menu



STEP 2:

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



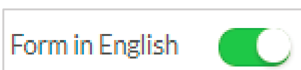


STEP 1:

The Customer Link can be selected from the Main Menu

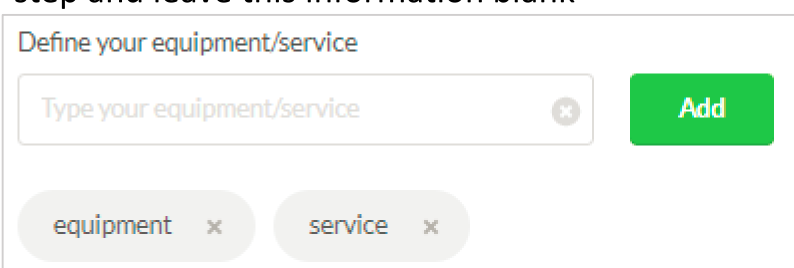
STEP 2:

Toggle the Customer Link ‘On’ next to Form in English



STEP 3:

You have the ability to provide your Equipment and/or Service on the form that the Customer will complete. You can do this by keying in the Equipment and/or Service you offer and clicking on the Add button. You can add more than one selection by continually adding Equipment and/or Service and clicking Add OR you can skip this step and leave this information blank



STEP 4:

Click Save

STEP 5:

The Customers will be able to click on the link and be directed to a one-page form in order to submit their application to the Dealer. The steps to complete the form are presented in the **Customer Link - Customer Process** section

STEP 6:

Once the Customer submits their information, Dealers will receive an email notification containing the following information:

a) Contract ID
b) Customer Name
c) Pre-Approved Amount
d) Comments
e) Installation Address
f) Phone Numbers
g) Email Address
h) Link to deal in the portal

STEP 7:

The deal will appear in the portal on the My Deals page. The Deal will be highlighted in gray and have a 'New' identifier beside it

Contract #	Customer	Status	Type	Email	Phone	Date	Equipment	Sales Rep	Value
New 109491	Customer Link	Declined		smandal@ecohomefinancial.com	0000000000	11/07/2017			
New 109490	share able	Pre Approved 20 K		smandal@ecohomefinancial.com	0000000000	11/07/2017			

STEP 8:

The Dealer can click on the edit icon or Contract # in order to complete the deal as they do today

STEP 1:

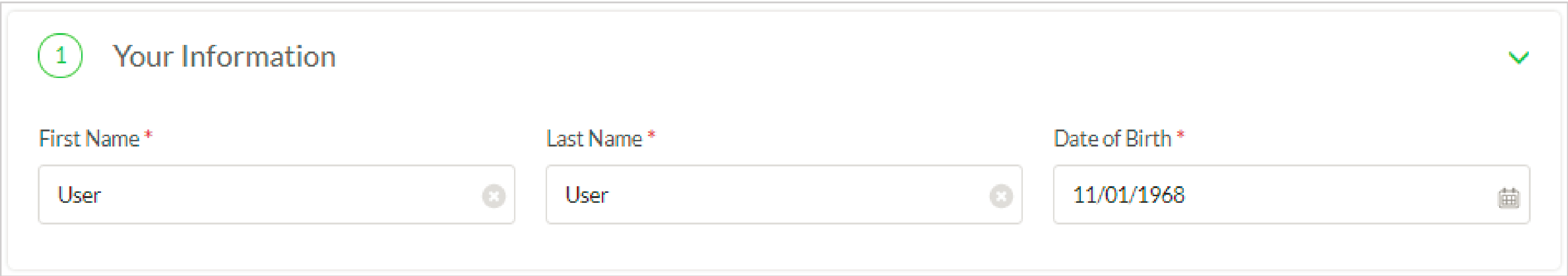
Customers will click on the link/button from the Dealers website or email

STEP 2:

Customers will be directed to a one-page form, this form is broken down into 3 sections: Your Information, Installation Address Information and Contact Information

STEP 3:

Customers will enter their First Name, Last Name and Date of Birth in the Your Information section


1 Your Information

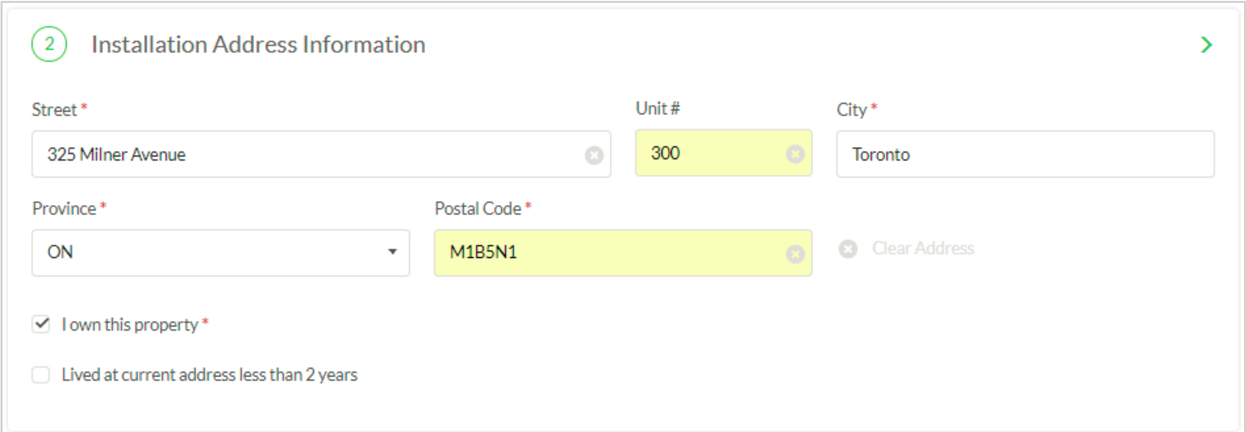
First Name * User

Last Name * User

Date of Birth * 11/01/1968

STEP 4:

Customers will enter full installation civic address, advise if they are the property owner and can advise if they have lived at the current address for less than 2 years


2 Installation Address Information

Street * 325 Milner Avenue

Unit # 300

City * Toronto

Province * ON

Postal Code * M1B5N1

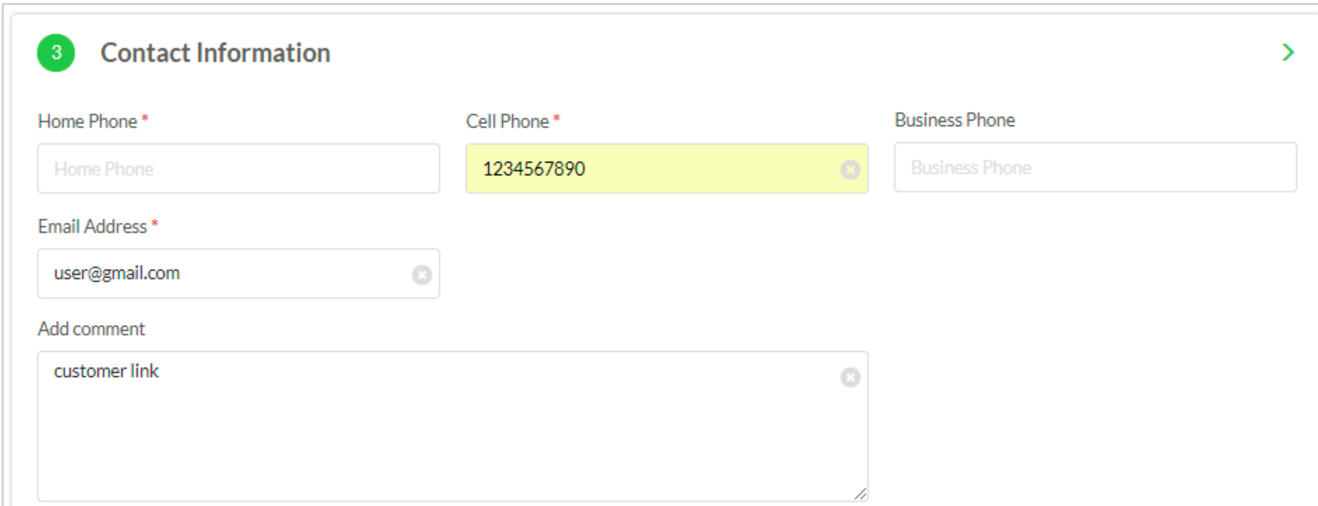
Clear Address

I own this property *

Lived at current address less than 2 years

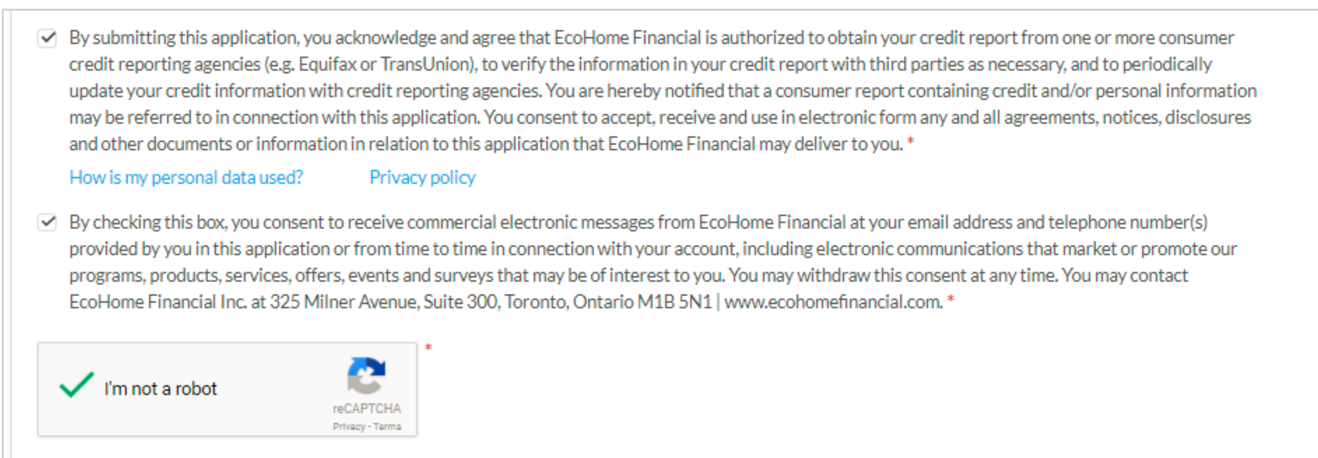
STEP 5:

Customers will enter one of the mandatory contact phone numbers, their email address and can enter notes that will be provided to the Dealer



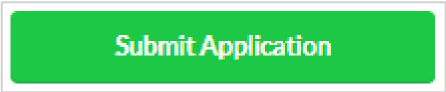
STEP 6:

Lastly, the Customer will review and authorize their credit report to be obtained and consent to receiving communication from EcoHome Financial. The Customer will confirm they are a person by checking the reCaptcha box



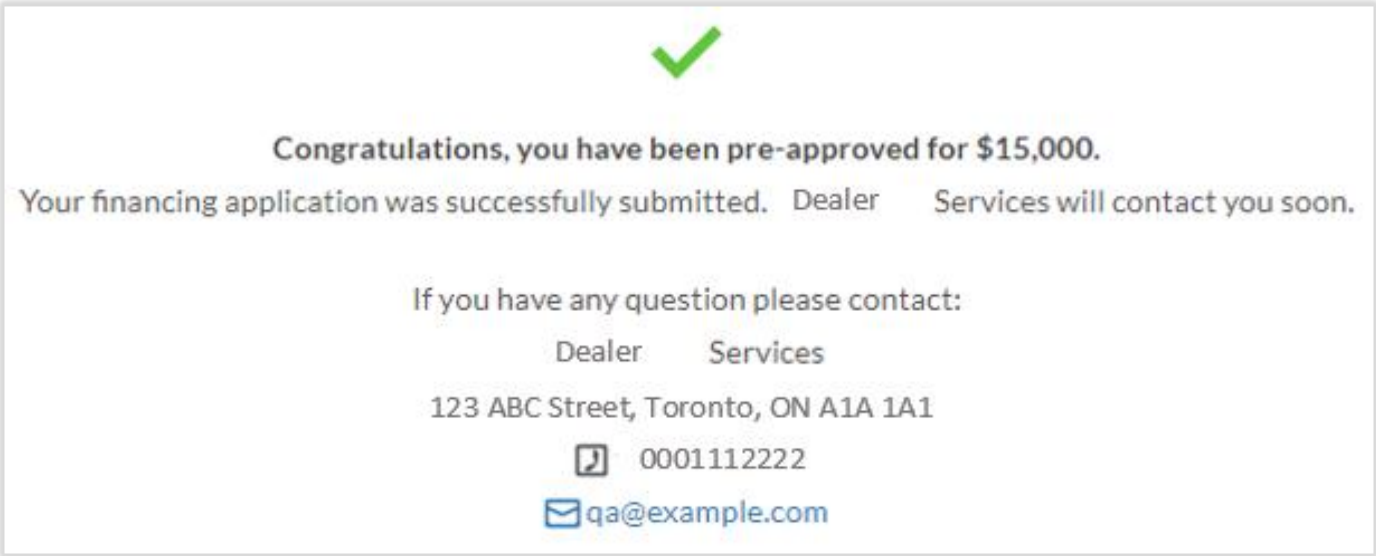
STEP 7:

Customer clicks Submit Application



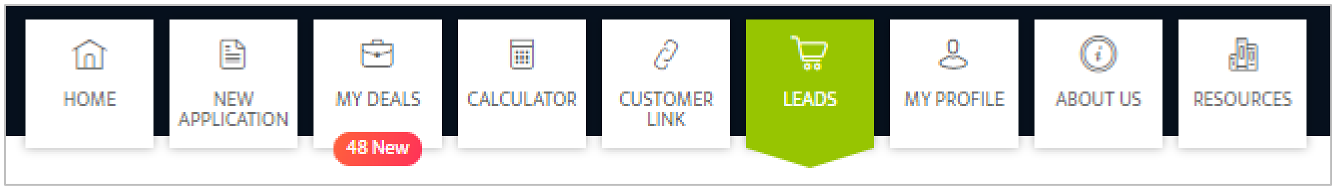
STEP 8:

Customer is presented with a successful message upon submission



STEP 1:

The Leads section can be selected from the Main Menu



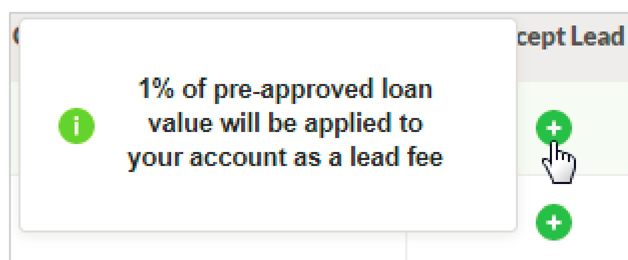
STEP 2:

The Leads are displayed with the following information:

- Date – lead was submitted by Broker/Agent
- Postal Code – partial FSA of the location of the customer
- Pre-Approved for - amount that the customer has been pre-approved for
- Project Type – the equipment/service the customer is interested in
- Customer Comment – if any is provided at the time the Lead is submitted
- Accept Lead – button to accept the Lead

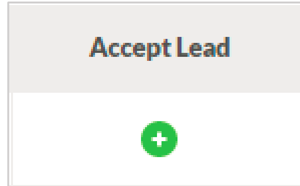
STEP 3:

Hovering over the Accept Lead button will display a message in regards to the fee of the Lead that will be charged to you



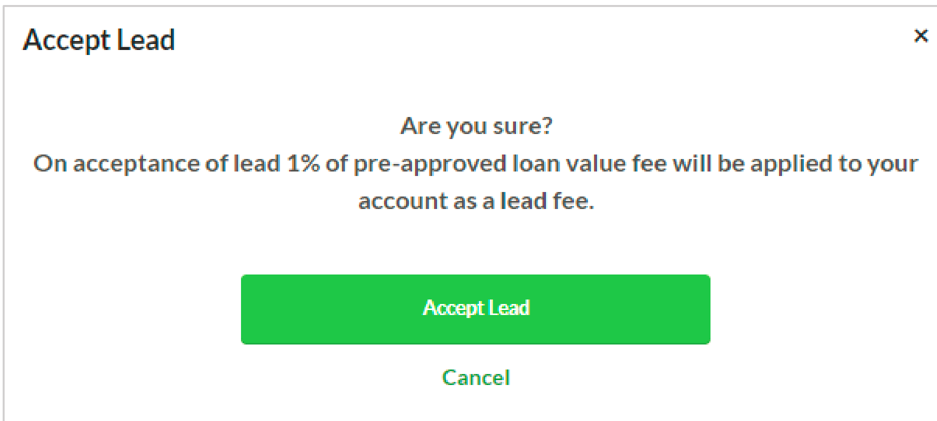
STEP 4:

To accept the Lead, click on the button in the Accept Lead column



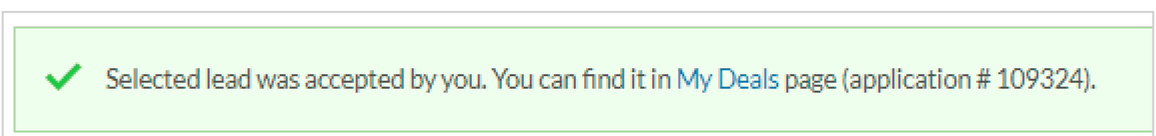
STEP 5:

A confirmation pop up message is displayed to accept the Lead, or cancel and return to the Leads page



STEP 6:

Once the Lead is accepted a confirmation message is displayed on the Lead page to advise where to locate the Lead and it’s corresponding application #



STEP 7:

The Lead will be displayed on your My Deals page. It will have a 'New" indicator next to it in the Contract # box, be highlighted light blue and appear to the top of the My Deals Page

	Contract #	Customer	Status	Type	Email	Phone	Date	Equipment	Sales Rep	Value	
	New 109324	Peter Pete	Saved		springroman+152@gmail.com	2222222222	11/07/2017	Air Handler			

STEP 8:

You will now see the following fields displayed to you:
Customer (name)

- Email (address of customer)
- Phone (number of customer)

STEP 9:

To edit the deal you click the Edit icon or the Contract #

STEP 10:

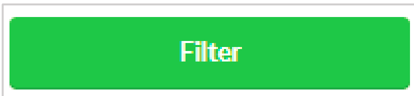
Once you have edited or opened the deal it is no longer considered new, nor is it highlighted

STEP 11:

Leads can be filtered by:

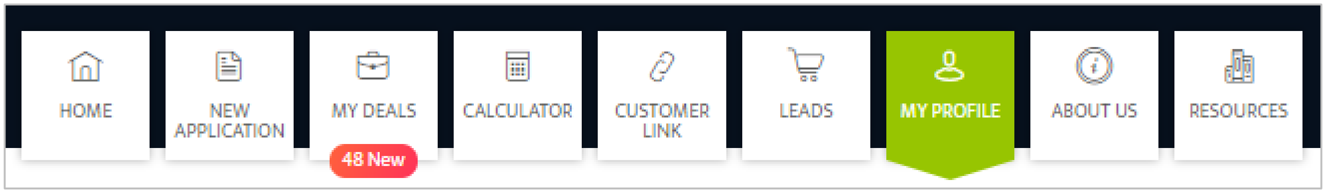
- Postal Code
- Pre-Approved for
- Date From – Date To

Click on the filter button once you have selected an option



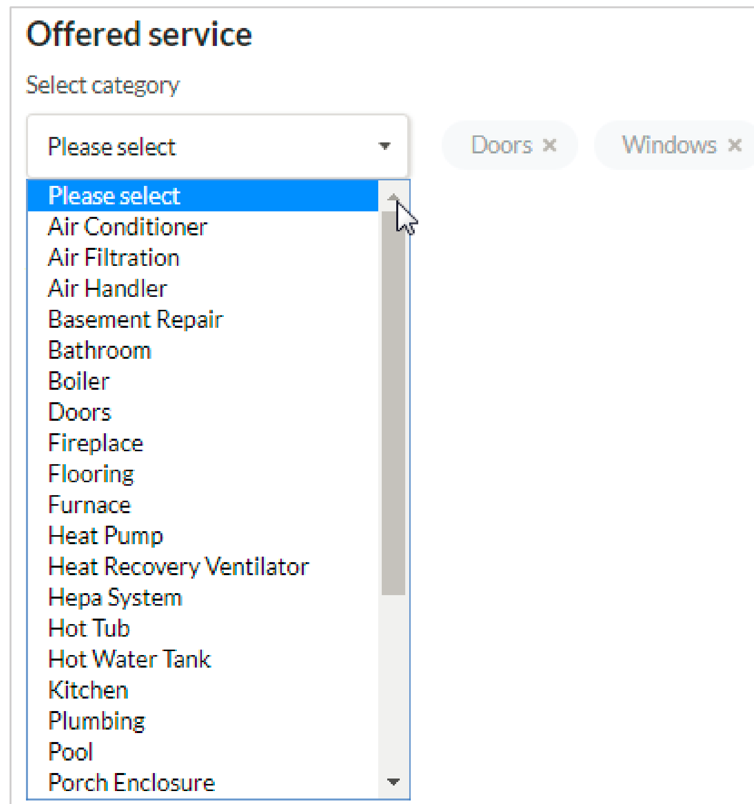
STEP 1:

The My Profile section can be selected from the Main Menu



STEP 2:

From the Offered Service drop down select the service that you provide. You can select one or many services from the list. As you select, the service will appear on the screen. To delete a service selected, click on the ‘X’ next to the service and it will be removed from your profile

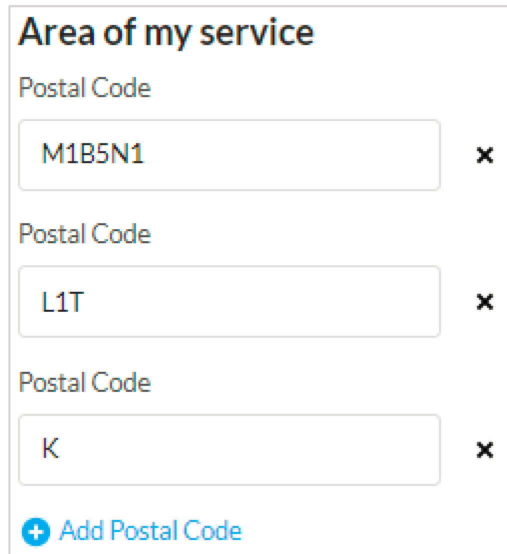


STEP 3:

To set your Area of my service click on Add Postal Code

STEP 4:

Enter postal code of your service area in any of these formats, M1B 5N1, L1T or K. To delete any postal code format, click on the 'X' next to the postal code



STEP 5:

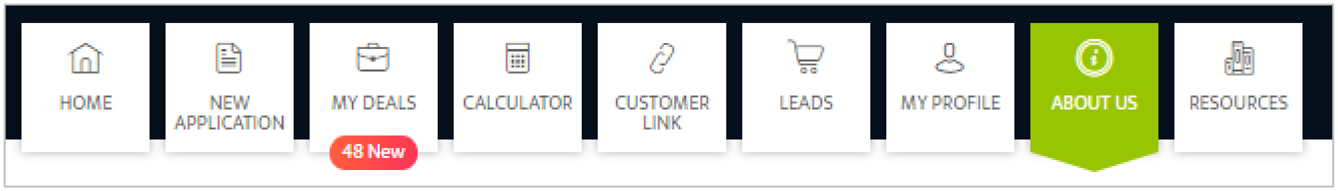
Click Save

STEP 6:

Your My Profile is set and can be updated at anytime

STEP 1:

The About Us section can be selected
from the Main Menu

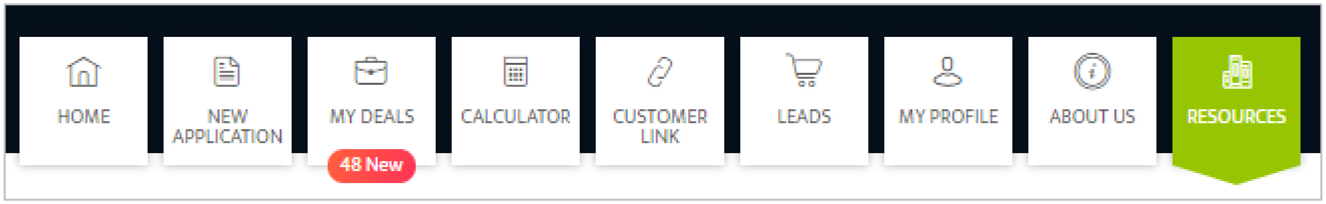


STEP 2:

About Us displays an overview about EcoHome Financial, Contact information and Location

STEP 1:

The Resources section can be selected from the Main Menu



STEP 2:

Resources will allow Dealers to access update material at any time and will be presented on the screen to view, download or print