Dealer Portal

User Guide

October 2017

MODULE 1

Dealer Portal

TABLE OF CONTENTS

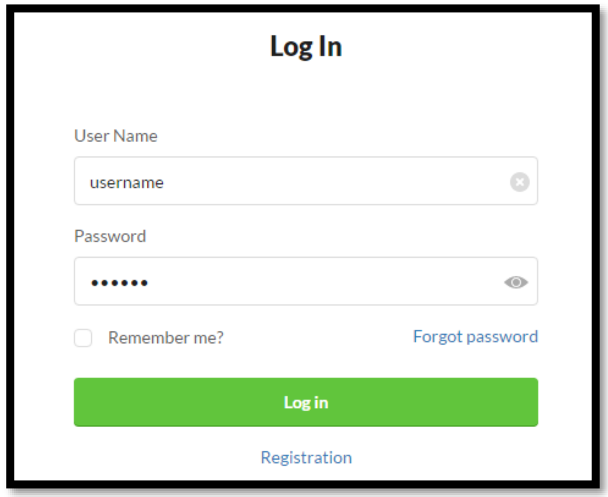
Getting Started

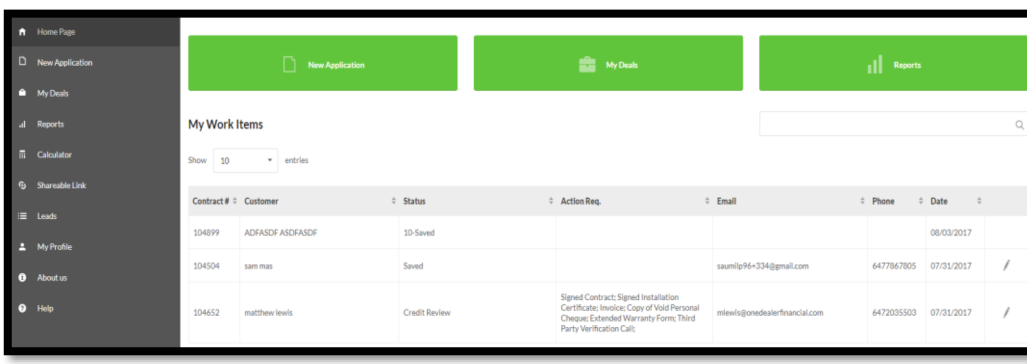
Logging Into The Portal

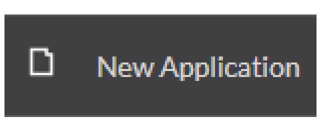
To login into the Dealer portal click on the following URL: https://beta.ecohomefinancial.com/ecohome/Account/Login. Your login credentials will be provided to you by you Sales Representative. If at any time you forget your password or have locked your account you can contact Dealer Support at 1-866-382-7468 ext.3 to have it reset

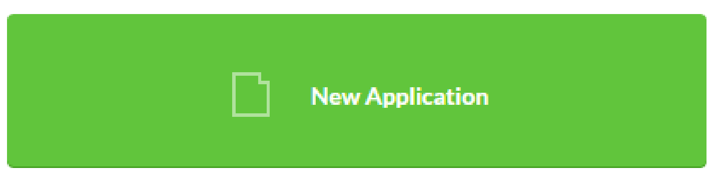
Creating An Application (Deal)

<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

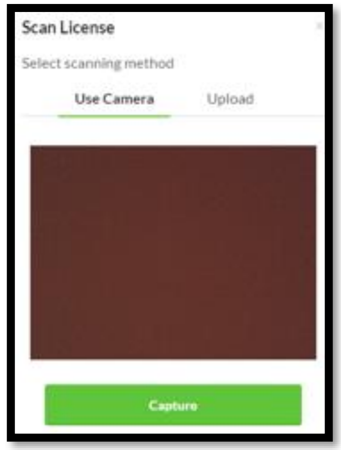

</td></tr>
<tr><td>3</td><td>You will be directed to your Dashboard upon successful login


</td></tr>
<tr><td>4</td><td>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




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

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5</td><td>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:

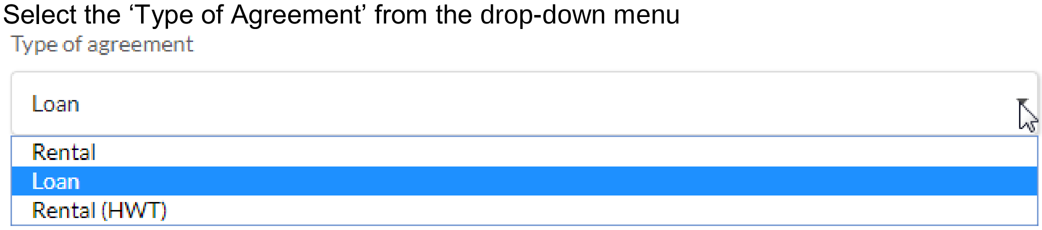
To scan the driver’s license, turn the license over to scan the barcode on the back of the license. Avoid any glare and turn off your flash</td></tr>
<tr><td>6</td><td>If drivers license is not available to be scanned enter the following information in the Borrrower Information section:
a. First Name
b. Last Name
c. Date of Birth</td></tr>
<tr><td>7</td><td>Select the identification of the customer viewed from the Customer’s Verification ID drop down menu</td></tr>
<tr><td>8</td><td>Enter your initials in the Dealer Initials feild</td></tr>
</table>

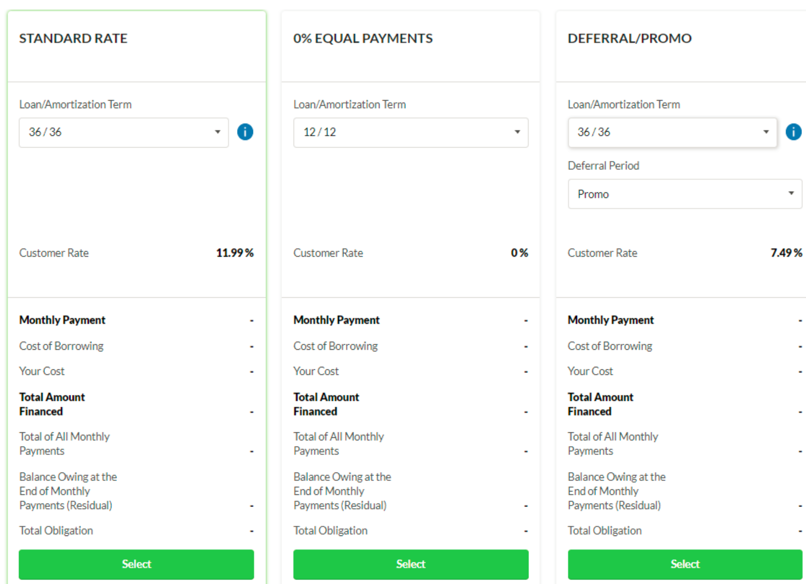
Step	Action
9	If you are the Customers home, click on ‘Get My Location’ to populate the Customers address Get My Location
10	If you are not at the Customers home enter the following information in the Installation Address Information section: a. Street b. Unit # c. City d. Province e. Postal Code
11	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
12	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
13	Confirm that the Customer is the Home Owner by clicking on the box as per the below in the form Borrower is home owner. If the first Customer is not the home owner you will have this option with the additional applicant
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
13	If there is an additional applicant, click on the ‘Add Additional applicant’ icon as shown below in the form to complete the additional applicant’s information Add additional applicant Enter/complete the following information in the Additional Applicant Information section: a. Scan driver’s license OR enter b. First Name c. Last Name d. Date of Birth e. Select the identification of the customer viewed from the Customer’s Verification ID drop down menu f. Enter your initials in the Dealer Initials feild

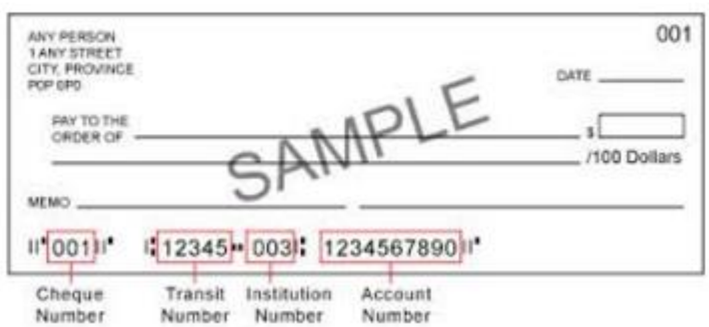
Step	Action
14	If the Additional Applicant’s address is not the same as the Customer’s address click on the Additional Applicant address is not the same as the borrower’s address ☑ Additional Applicant address is not the same as borrower's address Enter the following information in the Additional Applicant Address Information field: a. Street b. Unit # c. City d. Province e. Postal Code
15	Confirm that the Additional Applicant is the Home Owner by clicking on the box as per the below in the form ☑ Additional Applicant is a home owner If the first Customer is the home owner this is not required
16	The Additional Applicant 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
17	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

At least one of the applicants must be the home owner
At least one of the applicants should be aged 75 or less
Postal code is a minimum of 5 characters and maximum of 6 characters
You can’t proceed from Step 1 to Step 2 until all applicants agree to send their personal data to credit check

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>18</td><td>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
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>19</td><td>Select the ‘Type of Agreement’ from the drop-down menu
</td></tr>
<tr><td>20</td><td>Enter/complete the following information in the New Equipment Information section:
<ol type="a">
Type – select equipment/service from drop down menu
Description – complete this free form field
Cost – enter the cost of the equipment/service (including all taxes)
Add additional equipment – if required
Down Payment – if required
</td></tr>
<tr><td>21</td><td>Select the Financing Option based on your Rate Card
<ol type="a">
Standard Rate
0% Equal Payments
Deferral/Promo

The individual financing options will allow you to select Term and Amortization in ordet to automatically calculate all amounts
</td></tr>
<tr><td>22</td><td>Enter the Sales Rep name</td></tr>
<tr><td>24</td><td>Select the Estimated Installation Date</td></tr>
<tr><td>25</td><td>Enter House Size</td></tr>
<tr><td>26</td><td>Add Existing Equipment Information if required
</td></tr>
</table>

Step	Action
27	Enter any Contract Notes as needed in the notes field
28	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
29	Enter/complete the Contact and Payment Information section for the Borrower:  a. Enter home phone number b. Enter cell phone number c. Enter Business phone number d. Enter email address
30	If the Customer would like to receive electronic messages from EcoHome Financial, check the box next to the consent
31	If there is an additional applicant on the application, complete the Additonal Applicant Information secion: a. Enter home phone number b. Enter cell phone number c. Enter Business phone number d. Enter email address If the Additional Aplicant would like to receive electronic messages from EcoHome Financial, check the box next to the consent
32	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 PAP is selected enter Preferred Withdrawal Date, Bank Number, Transit Number and Account Number ***Sample of cheque image*** 
33	Click on the ‘Save and Proceed’ button to move to the next step
34	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
35	Once all information is complete and accurate, click on the ‘Submit Deal’ button
36	This process is complete. You can now print the contract

Printing The Contract

Step	Action
1	Click on the 'Print the contract' icon Print the contract
2	The contract will be auto-populated with all of the application details from the portal
3	Have the applicant(s) review and sign the contract
4	This process is now complete. You can proceed to uploading documents to the portal ***Sample of auto-populated contract***

EcoHome FINANCIAL

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Phone: 1-866-382-7468 | Fax: 1-877-489-3063
Website: www.ecohomefinancial.com
Email: info@ecohomefinancial.com

CREDIT APPLICATION and LOAN AGREEMENT

ABOUT THE BORROWER (Registered Owner of the Property)

Last Name: User	First Name: Test	Middle Initial:	Home Phone:	Cell Phone: 1234567890
Installation Address: 325 Milner Avenue	Unit Number:	City: Toronto	Province: ON	Postal Code: M1B5N1
☐ 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): 10/02/1968	E-mail Address: test@user.com			
Dealer confirms they have verified the Borrower's ID: DI (Dealer's Initials)	Type of identification verified by Dealer: Driver's license: ■ or Other: ☐ Please specify other type:			

ABOUT THE CO-BORROWER

Last Name: User	First Name: Retest	Relationship to Borrower:	
Date of Birth (mm/dd/yyyy): 10/01/1969	E-mail Address: test@user.com	Home Phone: 0987654321	Cell Phone:
Dealer confirms they have verified the Borrower's ID: DI (Dealer's Initials)	Type of identification verified by Dealer: Driver's license: ☐ or Other: ■ Please specify other type: Canadian or foreign passport		

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	6 3 6 8 9 6 5 4 3 4 5 6	
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)
1	Test Equipment

LOAN DISCLOSURE

1	Dealer Invoice Amount	$ 10,000.00	7B	Annual Interest Rate	8.99
2	Search and Registration Fee (due on Start Date)	n/a	8	Monthly Payment	$ 113.96
3	Down Payment	$ 1,000.00	9	Total of all Monthly Payments (5 x 8)	$ 6,837.60
4	Total Amount Financed (1 – 3)	$ 9,000.00	10	Balance Owing at End of Monthly Payments (end of term residual)	$ 5,532.26
5	Term (in months)	60	11	Total Obligation (2 + 9 + 10)	$ 12,369.86
6	Amortization Period (in months)	120	12	Total Cost of Borrowing (9 + 10 – 4)	$ 3,369.86
7A	Annual Percentage Rate ("APR") (as a percentage)	8.99	13	Deferral Option: ☐ Yes ■ No If no, Interest accrues from the Start Date Months (Deferral Period) ______ If yes, Interest accrues from Deferral End Date	

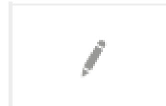
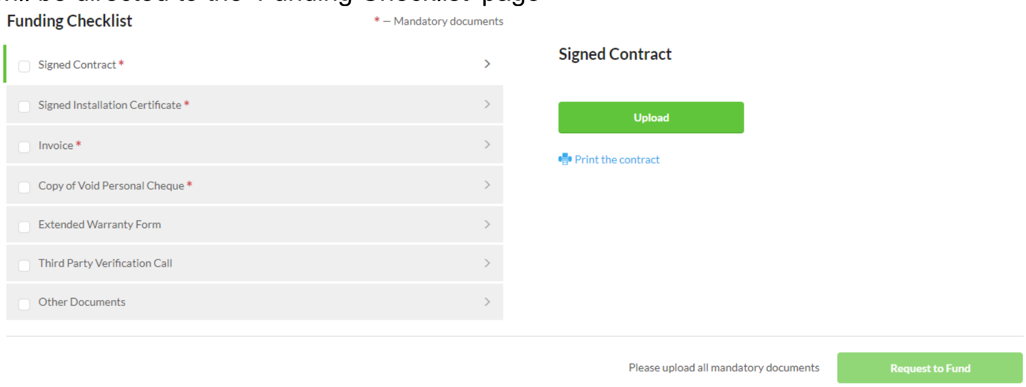
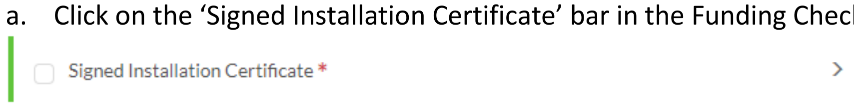
By signing this credit application below, you are applying for a loan on the terms and conditions on the face page of this Agreement, including the Loan Disclosure, and on the Terms and Conditions document either attached or printed on the reverse of this Agreement. Once this credit application and loan 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

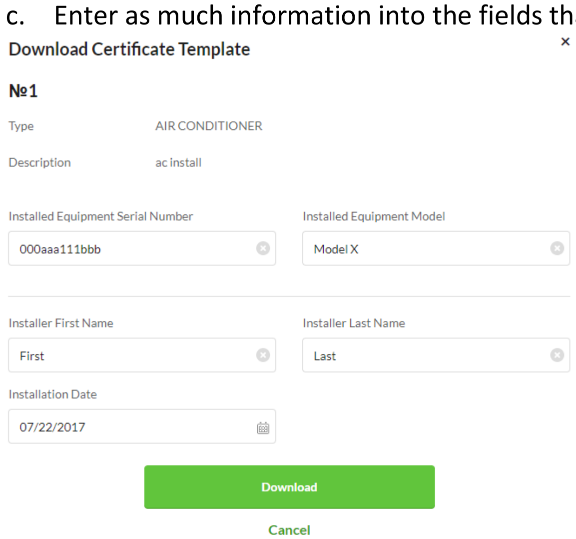
Dealer Legal Name: PHP Home Services		Contract Date: You signed this Contract in (City / Town) ______
Tel: 9056847941	Salesperson Name: Sales Rep	this ______ day of ______, 20 ______
Dealer / Salesperson Signature:	Borrower's Signature:	Co-Borrower's Signature:
FOR OFFICE USE ONLY	Approval #: 107783	

EH Loan Agreement (All provinces excluding QC) No Fee v2017-08-29 Page 1 of 1

Uploading Documents

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Return to you Dashboard or My Deals Page</td></tr>
<tr><td>2</td><td>To upload documents to your deal, click on the ‘Edit’ icon at the end of the row of the deal
</td></tr>
<tr><td>3</td><td>You will be directed to the ‘Funding Checklist’ page

</td></tr>
<tr><td>4</td><td>Save all of your documents that are required to be uploaded to your computer. The preferred file types are .PDF and .JPEG</td></tr>
<tr><td>5</td><td>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’

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

Step	Action
5 con't	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.

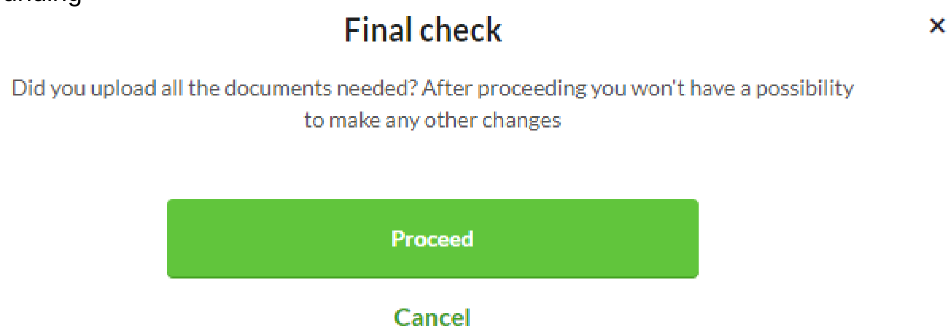
Date of Installation (MM/DD/YYYY):	07/22/2017	
Installer Signature:		Signature Required
Confirmation Signature:		Signature Required
Relationship to Customer:	☐ Customer ☐ Parent ☐ Spouse ☐ Other:	

Fax to 1-855-233-8236

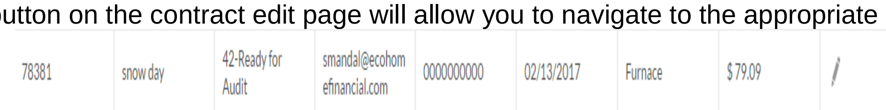
This financing program is provided exclusively by EcoHome Financial Inc.

Step	Action
6	To upload documents to your deal, click on any bar that you wish to upload the document to
7	Click 'Upload' Upload
8	Select the document you wish to upload, click open to select the file
9	Continue steps 7 and 8 until you have uploaded all of the documents
10	This process is now complete

Request to Fund (Deal)

Step	Action
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
2	You will be presented with a final check pop-up message to confirm that you wish to submit the deal for funding 
3	Click ‘Proceed’ to submit the deal for funding or ‘Cancel’ to go back to the Funding Checklist
4	This process is now complete

Editing a Deal

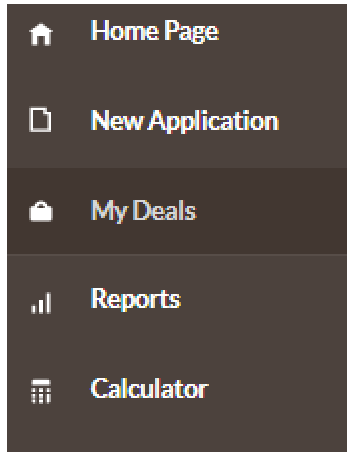
Step	Action
1	You can make modifications to already submitted contracts as long as they are not in the following Status: • Booked • Ready for Audit
2	You are able to make more modifications to already submitted contracts: The Edit button on the contract edit page will allow you to navigate to the appropriate step 
3	Editing the Deal Information, Equipment information, Existing Equipment Information and Additional Contract Information will redirect you to step 3 
4	Editing the Contact information and Payment information section will redirect you to step 4 
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.
7	The process is now complete

Viewing Your Dashboard (My Work Items)

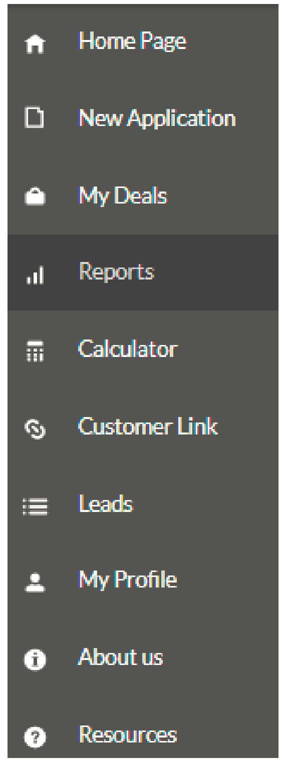
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Upon logging into the portal, you will be directed to your “My Work Items’ view or Dashboard</td></tr>
<tr><td>2</td><td>This page is filtered to show any ‘New’ deals from Shareable Link and accepted ‘Leads’ to the top of all the deals, highlighted gray with a ‘New’ icon next to the Contract #
</td></tr>
<tr><td>3</td><td>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)
</td></tr>
<tr><td>4</td><td>From the Dashboard you can clck the ‘Edit’ button on any deal in order to view/edit or upload documents to the deal</td></tr>
</table>

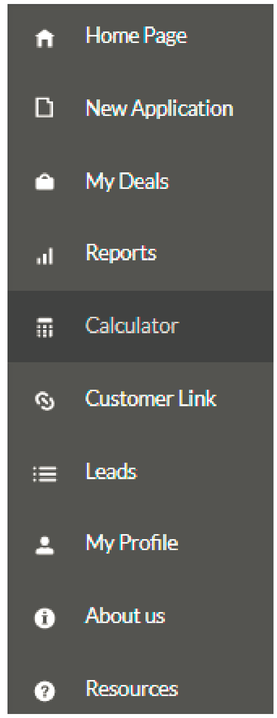
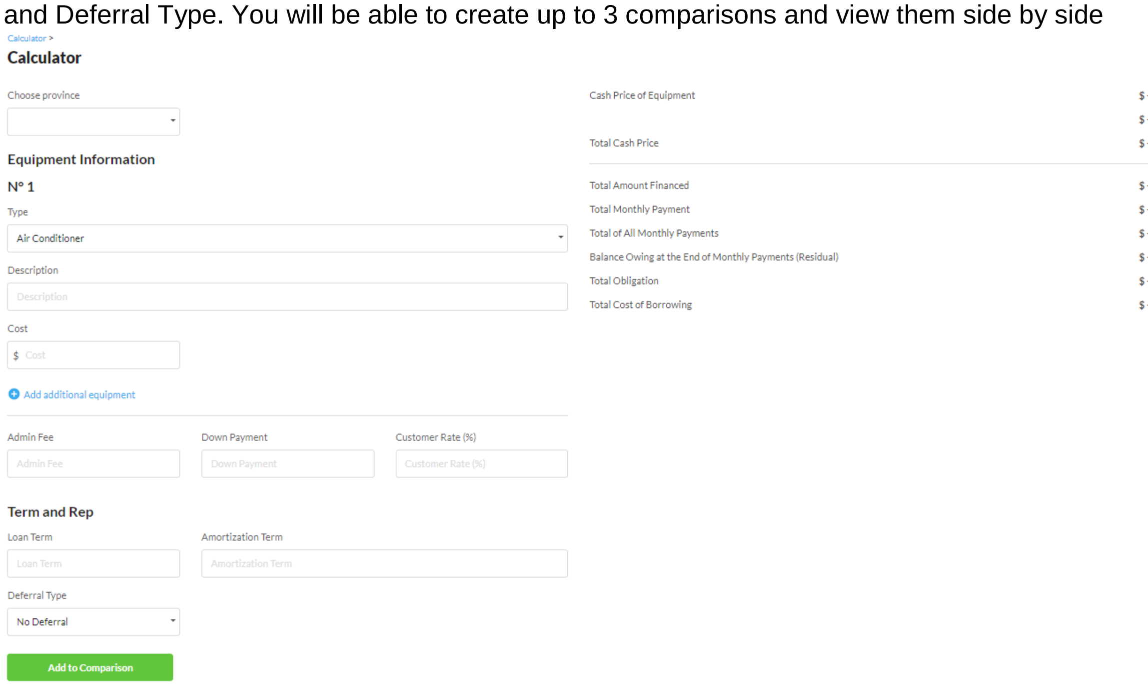
My Deals

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

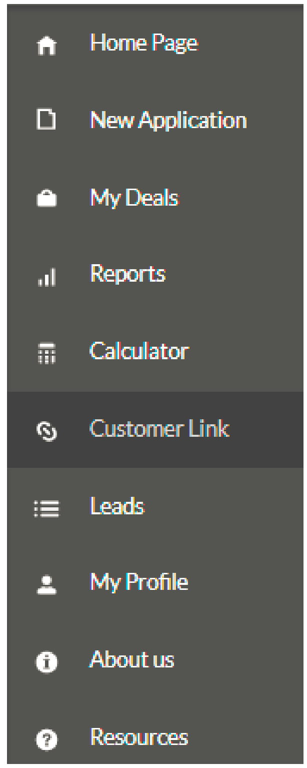
Reports

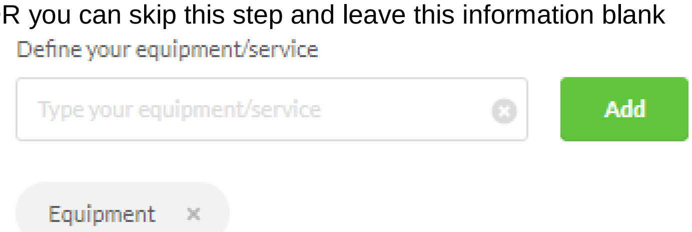
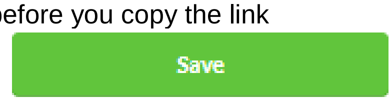
Step	Action
1	To access My Deals, you can select it from the Main Menu 
2	In the Reports section, you can view Deal Info or Detail Info. You can filter your view by: • Deal Type • Date From • Date To • Deal Status Once you have selected your criteria click the green Filter button to view your results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

Calculator

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>The 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>

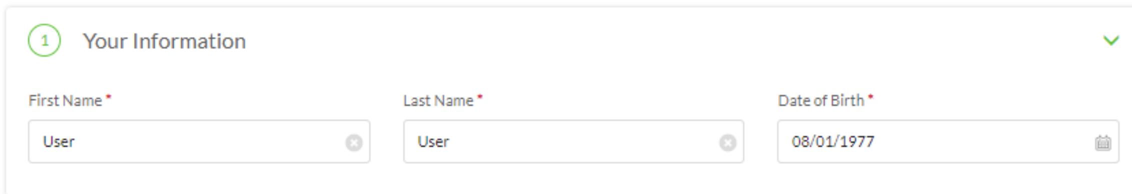
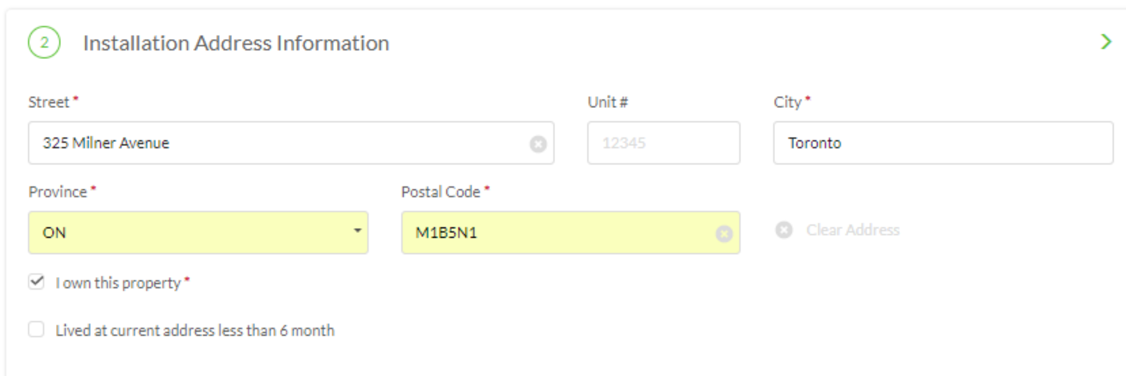
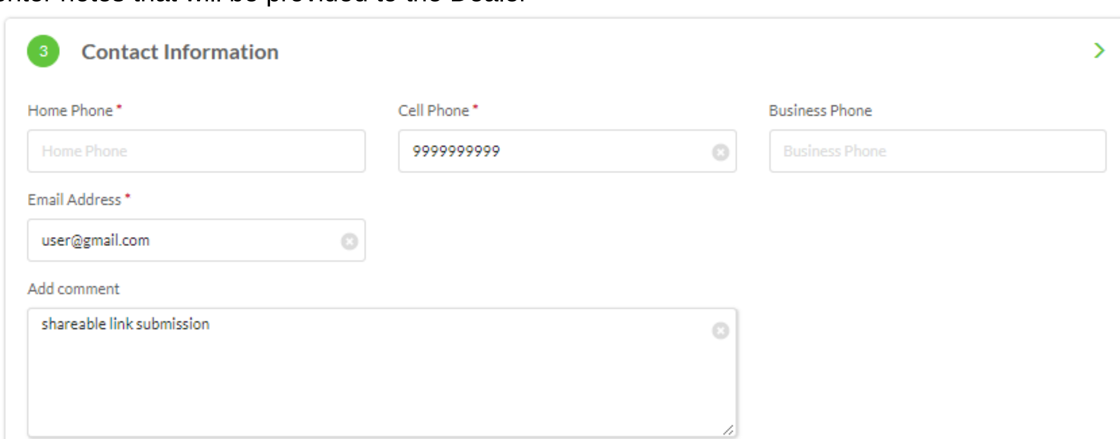
Customer Link

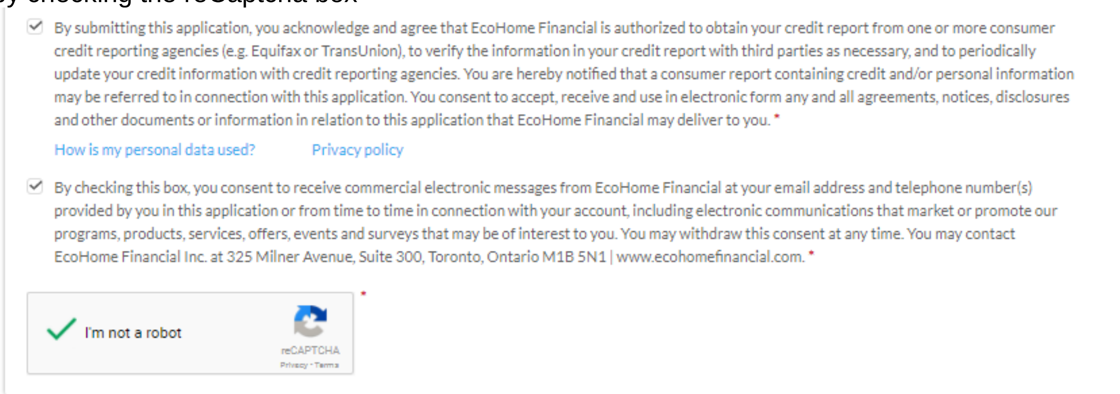
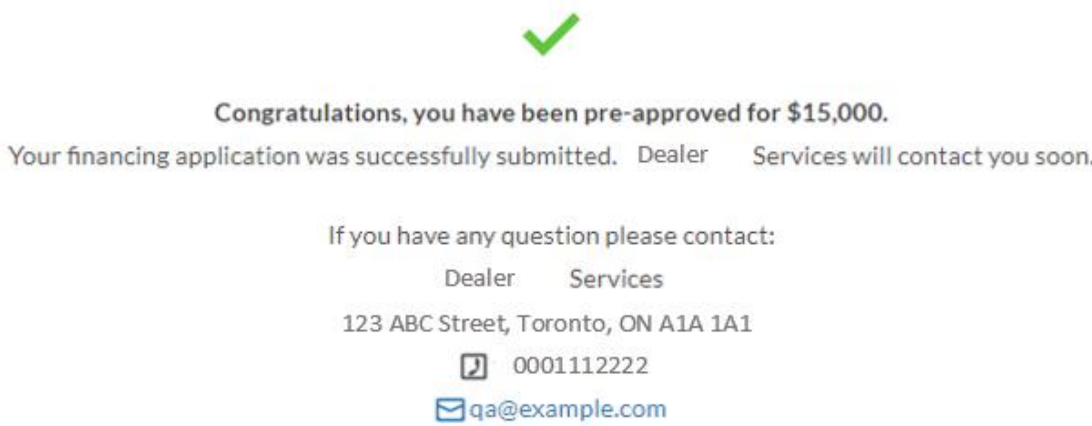
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>The Customer Link can be selected from the Main Menu

</td></tr>
<tr><td>2</td><td>Toggle the Customer Link ‘On’ next to Form in English

</td></tr>
<tr><td>3</td><td>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

</td></tr>
<tr><td>4</td><td>Click Save. Note – anytime you access the Shareable Link page to copy the link and you have to turn it on, you <u>must click Save</u> before you copy the link

</td></tr>
<tr><td>5</td><td>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 <u>Customer Link - Customer Process</u> section</td></tr>
</table>

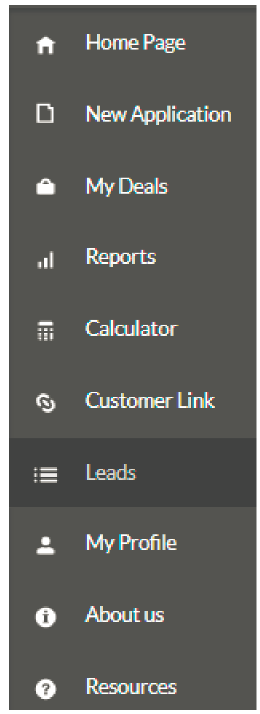
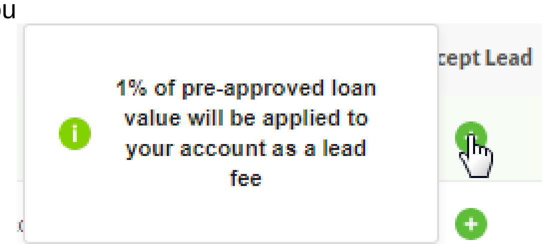
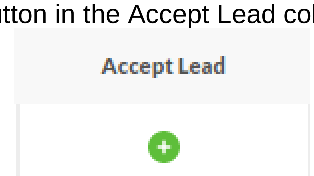
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>6</td><td>Once the Customer submits their information, Dealers will receive an email notification containing the following information:
a. Contract ID
b. Customer Name
c. Pre-Approved Amount
d. Comments
e. Installation Address
f. Phone Numbers
g. Email Address
h. Link to deal in the portal</td></tr>
<tr><td>7</td><td>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
<table>
<tr><th>Contract #</th><th>Customer</th><th>Status</th><th>Action Req.</th><th>Email</th><th>Phone</th><th>Date</th><th></th></tr>
<tr><td>New
94411</td><td>user user</td><td>20-Credit Review</td><td></td><td>sali.silvera@gmail.com</td><td>0000000000</td><td>07/04/2017</td><td></td></tr>
<tr><td>New
94410</td><td>User User</td><td>Pre Approved 20 K</td><td></td><td>user.user@gmail.com</td><td>0000000000</td><td>07/04/2017</td><td></td></tr>
</table>
</td></tr>
<tr><td>8</td><td>The Dealer can click on the edit icon in order to complete the deal as they do today</td></tr>
</table>

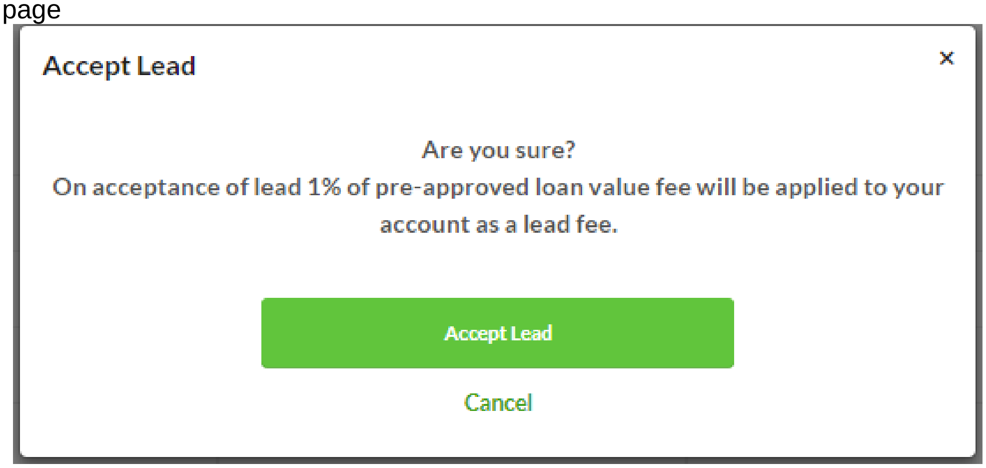
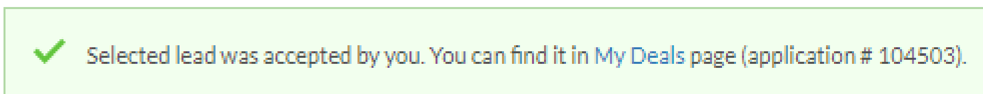
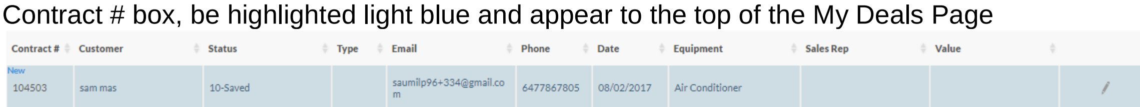
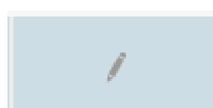
Customer Link – Customer Process

Step	Action
1	Customers will click on the link/button from the Dealers website or email
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
3	Customers will enter their First Name, Last Name and Date of Birth in the Your Financing section 
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 6 months 
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	Action
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 
7	Customer clicks Submit Application 
8	Customer is presented with a successful message upon submission 

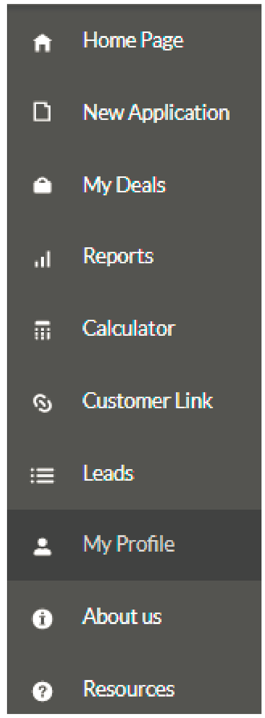
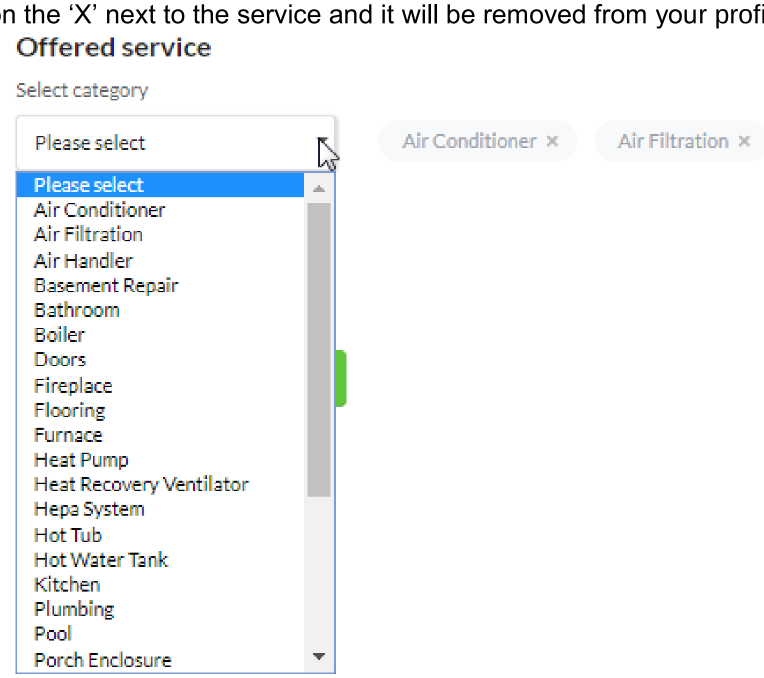
Leads

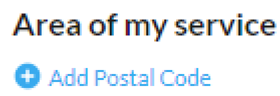
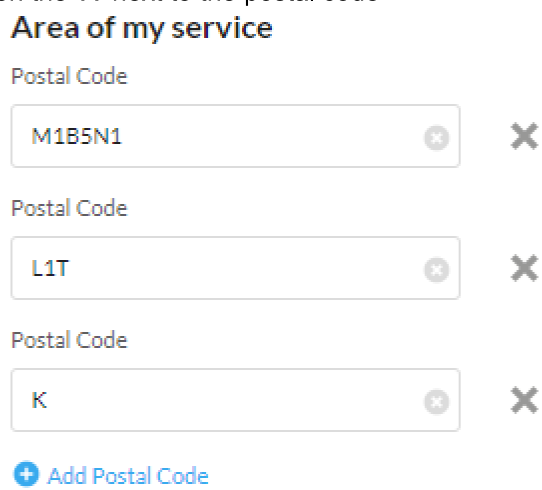
Step	Action
1	The Leads section can be selected from the Main Menu 
2	The Leads are displayed with the following information: • Date – lead was submitted by Broker/Agent • Postal Code – partial FSA of the location of the customer • Pre-Approved for - amount that the customer has been pre-approved for • 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
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 
4	To accept the Lead, click on the button in the Accept Lead column 

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5</td><td>A confirmation pop up message is displayed to accept the Lead, or cancel and return to the Leads page

</td></tr>
<tr><td>6</td><td>Once the Lead is accepted a confirmation message is displayed on the Lead page to advise where to locate the Lead and its corresponding application #

</td></tr>
<tr><td>7</td><td>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

<table><tr><th>Contract #</th><th>Customer</th><th>Status</th><th>Type</th><th>Email</th><th>Phone</th><th>Date</th><th>Equipment</th><th>Sales Rep</th><th>Value</th><th></th></tr><tr><td>New
104503</td><td>sam mas</td><td>10-Saved</td><td></td><td>saumilp96+334@gmail.com</td><td>6477867805</td><td>08/02/2017</td><td>Air Conditioner</td><td></td><td></td><td></td></tr></table></td></tr>
<tr><td>8</td><td>You will now see the following fields displayed to you:
• Customer (name)
• Email (address of customer)
• Phone (number of customer)</td></tr>
<tr><td>9</td><td>To edit the deal, you click the Edit icon
</td></tr>
<tr><td>10</td><td>Once you have edited or opened the deal it is no longer considered new, nor is it highlighted</td></tr>
<tr><td>11</td><td>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

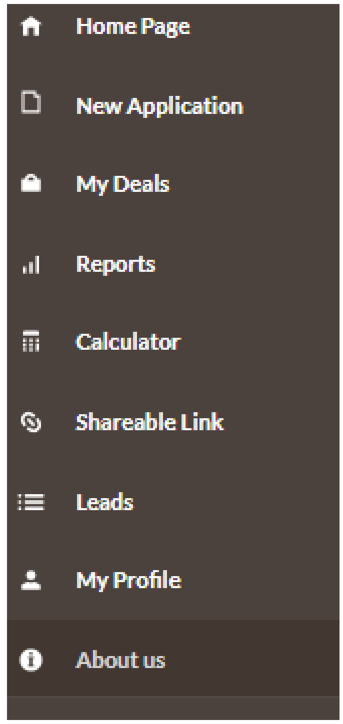
</td></tr>
</table>

My Profile

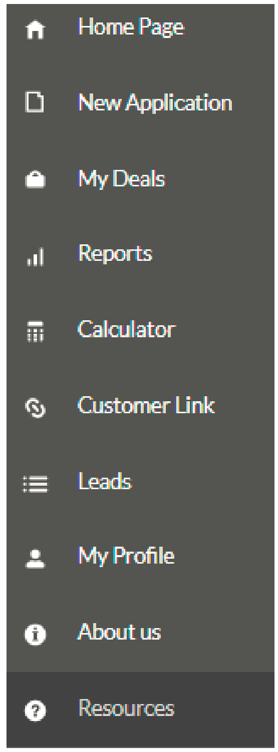
Step	Action
1	The My Profile section can be selected from the Main Menu 
2	From the Offered Service drop down select the service that you provide. You can select one or many services from the list. As you select, the service will appear on the screen. To delete a service selected, click on the 'X' next to the service and it will be removed from your profile 

Step	Action
3	To set your Area of my service click on Add Postal Code 
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 
5	Click Save 
6	Your My Profile is set and can be updated at anytime

About Us

Step	Action
1	The About Us section can be selected from the Main Menu 
2	About Us displays an overview about EcoHome Financial, Contact information and Location

Resources

Step	Action
1	The Help section can be selected from the Main Menu 
2	Resources will allow Dealers to access many important documents at any time. The document will open in a new window allowing the user to view, download or print them.