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Instant pre-qualification					·		4140
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Tour annual pre-tax (gross) income. A	imony, child support, and separate		nol. Road more				
Social Security Number		Date of birth Month +	Day	Year		39 DEED MODE	
Numbers only, no dashes							

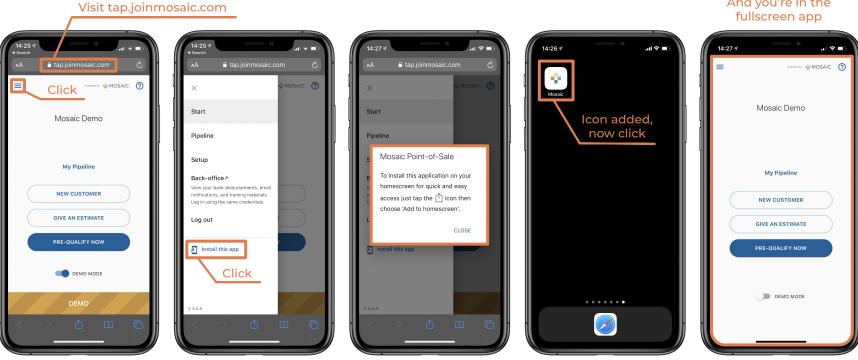
Solar financing, available for the first time on the Portal 2X

- Step-by-step process is simple and easy to use
- Three sales paths: New Customer; Give an Estimate; Pre-qualify Now
- Proposals begin with just a phone number and email address
- Instant pre-approval decisions and loan agreement signatures via text message or email
- Mobile and desktop design works on any device



Portal 2X is a website... and an app!

Follow these steps to add Portal 2X as an app on smartphones and tablets



And you're in the



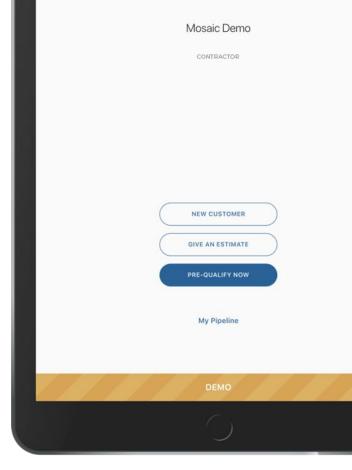
PowerSwitch ZERO Loans through the Mosaic platform are made by WebBank, Member FDIC, Equal Housing Lender. CONTRACTOR/INSTALLER USE ONLY - NOT INTENDED FOR DISTRIBUTION TO HOMEOWNERS

The Sales Process Goes from Estimate to Closing in a Few Clicks

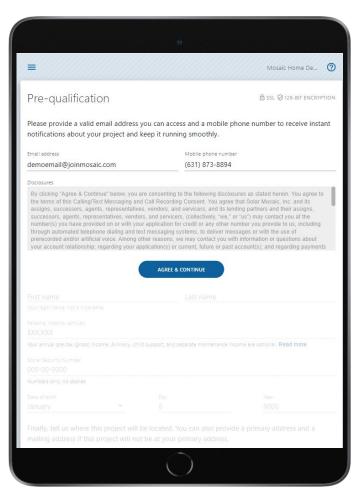
Head to <u>tap.joinmosaic.com</u> to log in and get started from any smartphone, computer, or mobile device!

- → Select "New Customer" to capture your lead with the option of coming back to it later.
- → Easily show your customers estimates for their solar projects by selecting "Give an Estimate".
- → Want to pre-qualify your customer first? Click "Pre-Qualify Now" to get started with the application process.

Regardless of which path you take, you can always complete an application when you and your customer are ready.



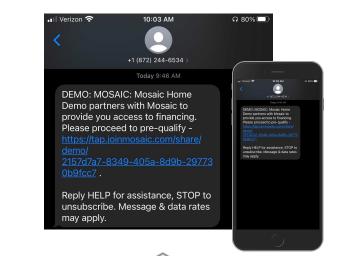




Getting Started Pre-Qualify Now

Have your customer enter their mobile number and email and click "Agree & Continue"

Note: Your customer must have a cell phone with text messaging capability.





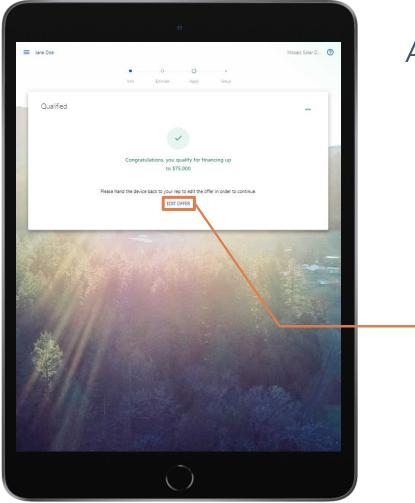
Completing the App

Once your customer agrees to receive text messages from Mosaic, they can continue to fill out their secured application on your device; or, if they prefer, they may also use their own device to access the application link that they received via text message.

Once your customer fills out their pre-qualification, they'll click submit to receive a decision (with no impact to their credit score!).

Pre-qualification				6 S	SL 🖗 128-BIT ENCRYPT	ION
Thanks! Please continue below.	We also sent you	a link in c	ase you need to finish th	is later.		
demoemail@joinmosaic.com	n	â	(631) 873-8894		i	6
			Add an alternate phone nur	mber if any.		
Tell us a bit more about yoursel First name	n. Don't worry, this	s pre-quai	Last name	naro inquiry on	your credit.	
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Kur legal name, not a nickname.						
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Your annual pre-tax (gross) income. Alime	ony, child support, and a	eclarate	Numbers only, no dashes			
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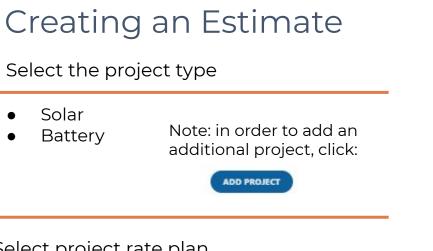


Application Submission

Once your customer is qualified, click "Edit Offer" to select the project type and rate plan with the customer.

Note: The maximum approval amount for PowerSwitch ZERO is \$75,000.

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Select project rate plan

Work with your customer to determine and select the rate plan that best meets their needs and priorities.

Note: Rate plans are dependent on your partner rate card. Please coordinate with your Regional Sales Manager or Partner Development Manager for clarification.

Homeowners receive rate card discounted APRs by signing up for automatic payments.

E Jane Doe			Mosaic Solar D
		o 0 +	
	Edit offer	×	
		by adding/removing project types or editing the cost.	
Qualified			
		Qualified for up to:	
		\$75,000 Total project amount:	
		\$20,000.00	
	200		
	Type Solar	Cent \$ 20,000.00	
	1.402	20,000.00	
	Optional description		
		ADD PROJECT	
	France plans		a a Rati
	12-month promo period	\$0.00 est, per month	
	+20 years	\$122.81 est. per month	
	3.74% APR, inclusive of Promo		
	12-month promo period	\$0.00 est. per month	1253
	+15 years	\$156.60 est. per month	10005-155
	4.24% APR, inclusive of Promo		
	12-month promo period +10 years	\$0.00 est. per month	
	3 74% APR, inclusive of Promo	\$207.43 est. per month	
			Sec. 3.
	C	CANCEL	
		SAVE	
		1999 Bar	all states



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Reviewing Loan Terms

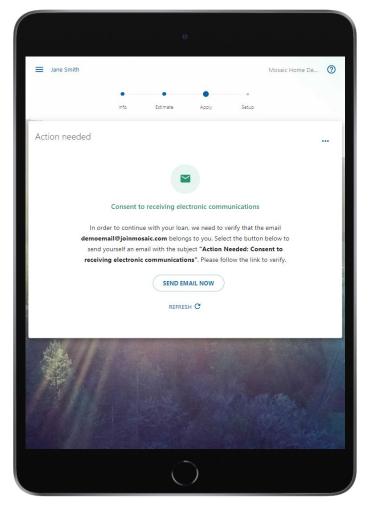
Prior to your customer reviewing and signing their loan docs, Mosaic lets you share with them certain key loan terms.

Note: Once the customer selects "Accept Loan Terms", they will be redirected to DocuSign so that they can review and sign their loan documents.

Review & accept		-
	Promo period**	Loan terms
Arnount Financest	\$20,000.00	\$20,000.00
First payment due:*	No mandatory payments	Dec 7, 2021
Monthly payment.*	\$0.00	\$207.43
Armual Percentage Rate (7/PR*).*	Interest deferred	3.74%
Number of payments.*	No payments for 12 months	119
Finance charges:*	\$0.00	\$4,890.64
Total payments.*	\$20,000.00	\$24.890.64
Wi values are based on extinutes. "All values representative of princi promo period, we recommend pays balance is not paid in full during th Annual Percentage Rate of 3.74%. Disbursements will be made as Pright stope	ing your principal balance in All Guring the prom e promo period, the deferred interest will be char s each stage is completed. Interest will begin Solar, Install Complete stage \$20.0	ged to your account from the loan start date at an to accrue on the date of each disbursemen 00.00
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E-Sign Consent

If your customer did NOT complete their application from the secured link that was delivered to their mobile phone during the pre-qualification stage, they will be required to consent to receiving electronic communications before they can proceed.

Select "Send Email Now" to trigger the request.

Note: If this is not completed within 60 days, the customer will need to re-apply.

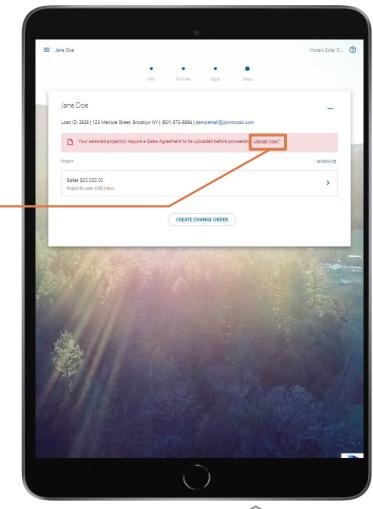
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Project Confirmation

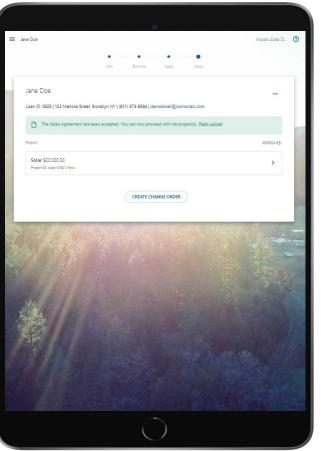
As part of the review process for PowerSwitch Zero, you must upload a valid Home Improvement Agreement within the "Upload Now" link in the red messaging.

Color orrow	amont	×			
Sales agree	ement				
Please make sure this is the correct customer before uploading the sales agreement, also known as the home improvement agreement (HIA).					
Customer	Jane Smith				
Project address	123 Melrose St Brooklyn NY 11206				
User name	Jane Smith				
Date and time	July 24, 2020 10:17 AM PDT				
	CANCEL SUBMIT				





Project Confirmation

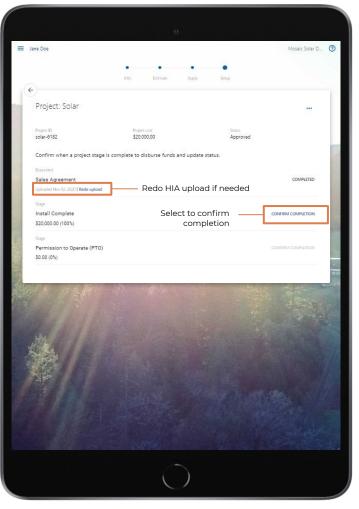


Once the Home Improvement Agreement has been received, reviewed, and approved, you may now submit for project completion once you have completed installation.

Note: If a change order is needed, you may select "Create Change Order" to begin the process.

This will require your customer to sign new loan documents.





Getting Paid

Once the project installation is complete, you can select "Confirm Completion" in order to begin the process.

Note: You can redo the Home Improvement Agreement upload if needed.

Request confirmation

×

Customer: Jane Smith
 Address: 123 Melrose St Brooklyn NY 11206

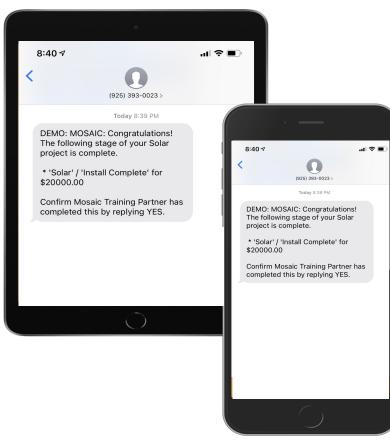
- Project name: Solar
- ✓ Stage name: Install Complete
- V Stage cost: \$20,000.00

Send to (480) 479-3819



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What Your Customer Sees



Your customer must respond "Yes" to the text message they will receive in order for you to get paid for the project.

Note: You will still be required to upload the Permission to Operate document as part of finalizing the customer's loan.



Project Completed

Jane Doe			Mosaic Solar D
	• •		
	Info Estimate	Apply Setup	
<			
Project: Solar			
Project ID	Project cost	Status	
solar-6182	\$20,000.00	Approved	
Confirm when a project stage is	complete to disburse funds and	d update status.	
Document			
Sales Agreement Uploaded Nov 02, 2020 Redo upload			COMPLETED
Stage Install Complete			COMPLETED
\$20,000.00 (100%) Confirmed Nov 02, 2	020		COMPLETED
Stage Permission to Operate (PTO)			CONFIRM COMPLETION
\$0.00 (0%)			
AND.			

The last step in completing the project requires you to upload the PTO document.

Select "Confirm Completion" and upload the proper file, and select "Submit"

Note: Mosaic will review the document for approval and will notify you if it is not sufficient.

document	re this is the correct customer before uploading the PTC
Project name	Solar
Stage name	Permission to Operate (PTO)
Stage ID	5429
Stage cost	\$0.00
Customer	Jane Smith
Project address	123 Melrose St Brooklyn NY 11206
	Select and upload file CHOOSE FILE
User name	Jane Smith

