CLEAN SIGNING | Job Aid

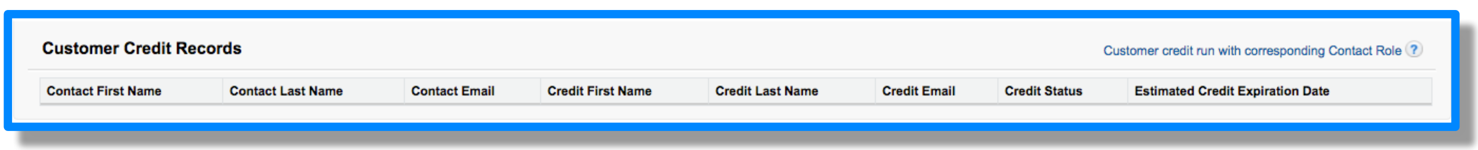
Understanding how to sign clean deals with Sunrun in the Partner Portal

This Job Aid explains the newest additions to Partner Portal's Clean Signing functions. These features help sales consultants choose the correct person that should be signing the Sunrun Agreement, a verified titleholder and also the person that passes credit.

QUALIFYING THE CUSTOMER

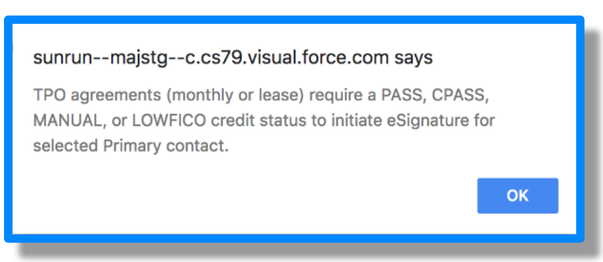
Once you review the Sunrun Proposal with the customer and they are ready to move forward, it is time to see if they qualify for the product. **You must check credit before the customer is able to sign the Agreement.**

1. Check customer credit in Partner Portal
   - Checking Credit in Partner Portal Job Aid: http://bit.ly/2QLwKNu
   - Checking Credit in Partner Portal Video: http://bit.ly/2KsQy7b
2. Verify the customer has passed credit in the **Customer Credit Records** section on the **Opportunity Page**



Screenshot 1: Customer Credit verification

3. If you try to sign the Agreement without running credit first, you will receive the message below. For additional information on credit results refer to:
   - Credit Requirements Checklist: http://bit.ly/2CPXtnf



Screenshot 2: Credit message

SIGNING THE AGREEMENT

Now that the customer has qualified for the product, take the following steps to sign the Agreement. For a review of how to sign the Agreement in Partner Portal, use the resources below:

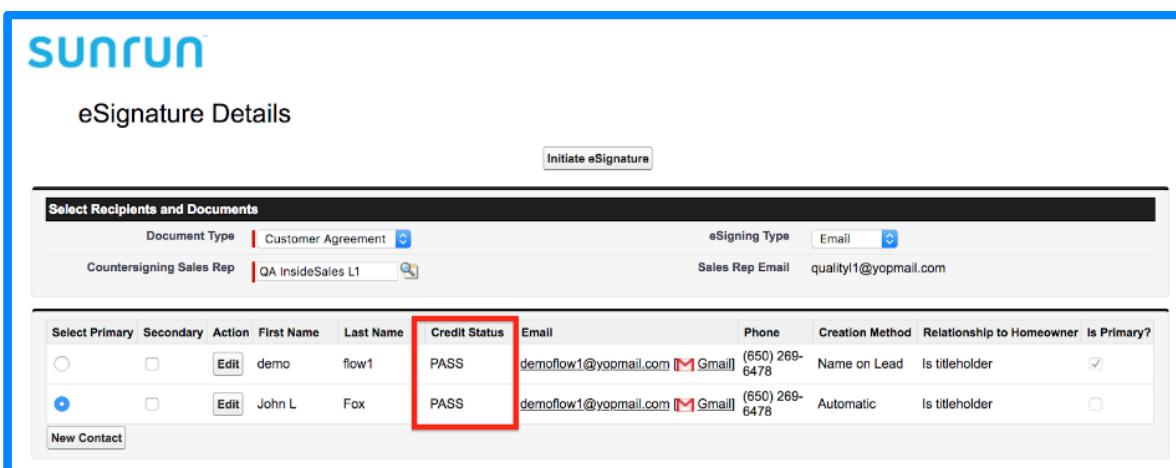
- Signing Documents in Partner Portal Job Aid: http://bit.ly/2WduqA1
- Signing Document in Partner Portal Video: http://bit.ly/2WqflKJ

Utilizing Clean Signing functions

When initiating eSignature, use the Clean Signing functions to select the correct signer.

> **Note**: Remember to **ACT**. The same person that signs the **A**greement must have passed **C**redit and be on **T**itle

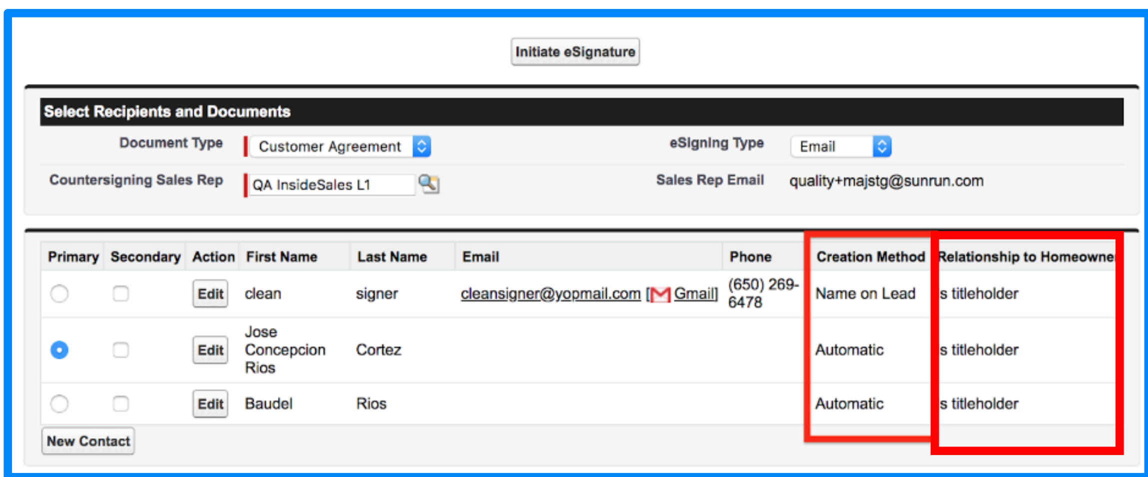
1. Make sure the customer has passed credit. The credit status will be displayed within the eSigning Workflow.



Screenshot 3: Verifying credit for selecting Agreement Signer

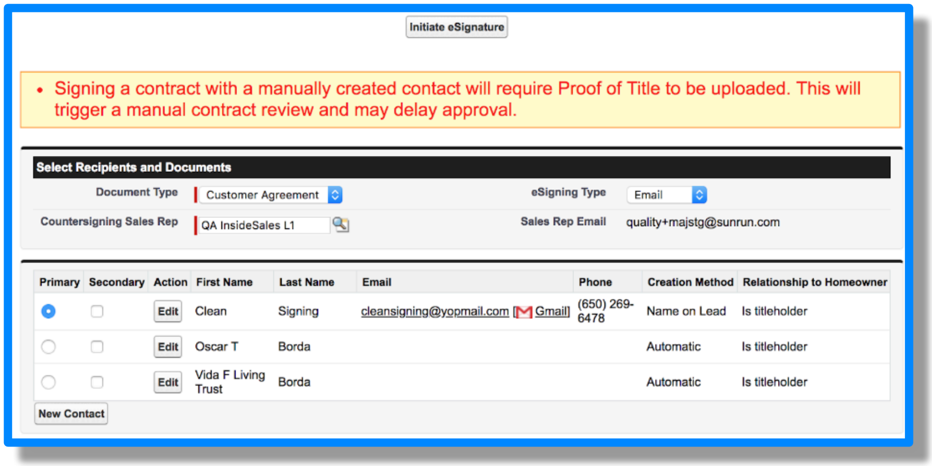
2. Make sure the customer is the titleholder. The Creation Method will tell how the contact was generated. Choosing Automatic or Project Ops guarantees you are signing with a verified titleholder. Automatic contacts are selected by default.

- Automatic - the contact was created with the known titleholder, as provided by CoreLogic Title Check Service
- Name on Lead – the contact was created from the name that was inputted on the lead
- Project Ops – the contact was created by a project operations member and represents a documented titleholder
- Manual – the contact was created by a user



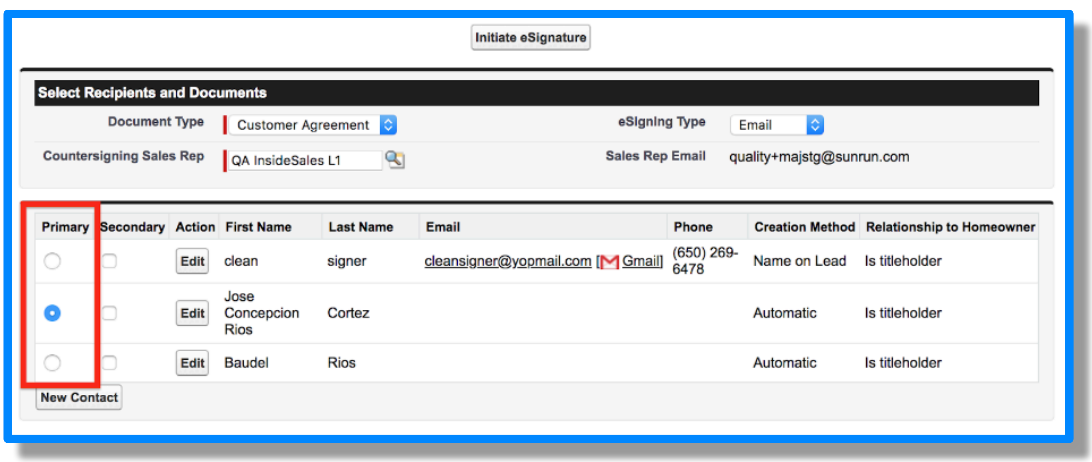
Screenshot 4: Creation Method and Relationship to Homeowner

a. You may sign with any contact Creation Method, however choosing **Name on Lead** or **Manual** will add additional ODI requirements. You will be required to upload **Proof of Title** prior to submission to the **Working Documents** section on the **Proposal Page.** Proof of Title may include a copy, PDF or photo of any document that establishes homeownership including a mortgage statement, title or deed.



Screenshot 5: Signing with Manually Created Contacts

3. Use the radio button to select a primary signer. The name chosen will be populated onto the Agreement. There is no need to choose a primary contact prior to generating an Agreement or prior to signature.



Screenshot 6: Choosing a Primary Signer