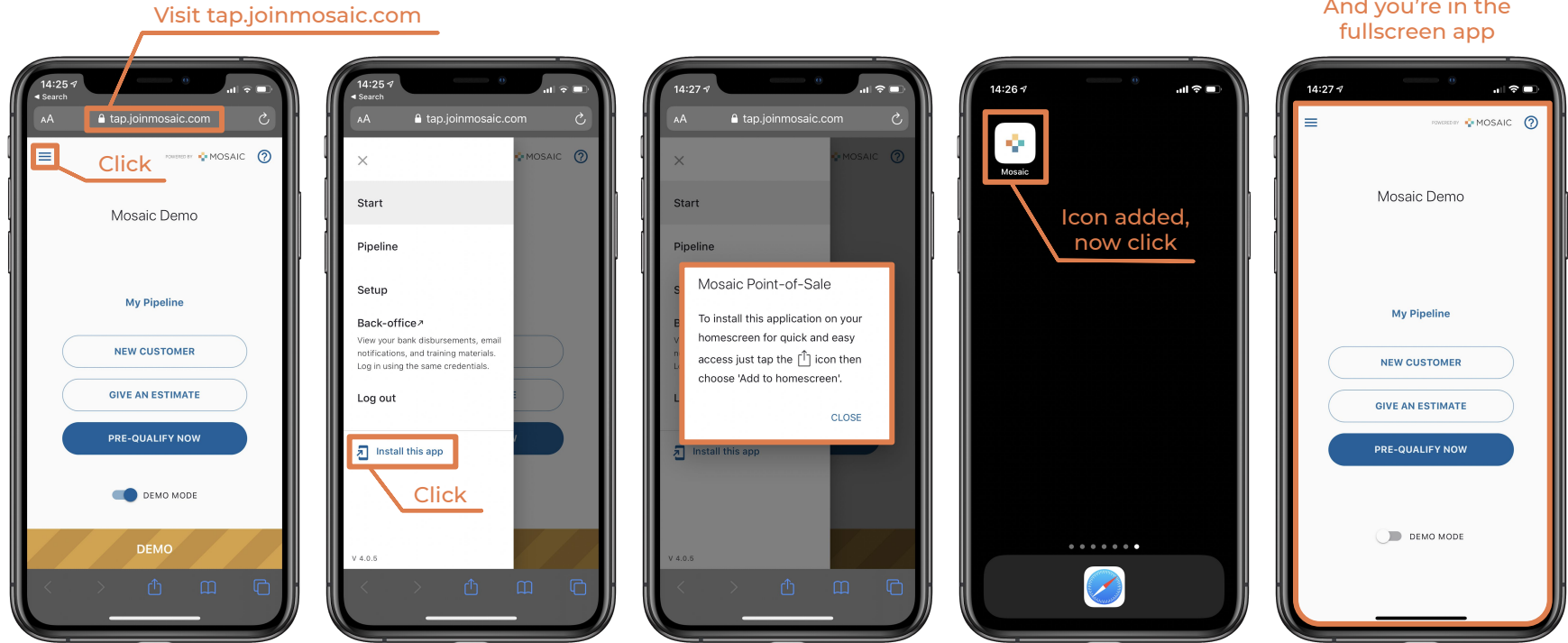


Solar financing, available for the first time on the Portal 2X

- 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

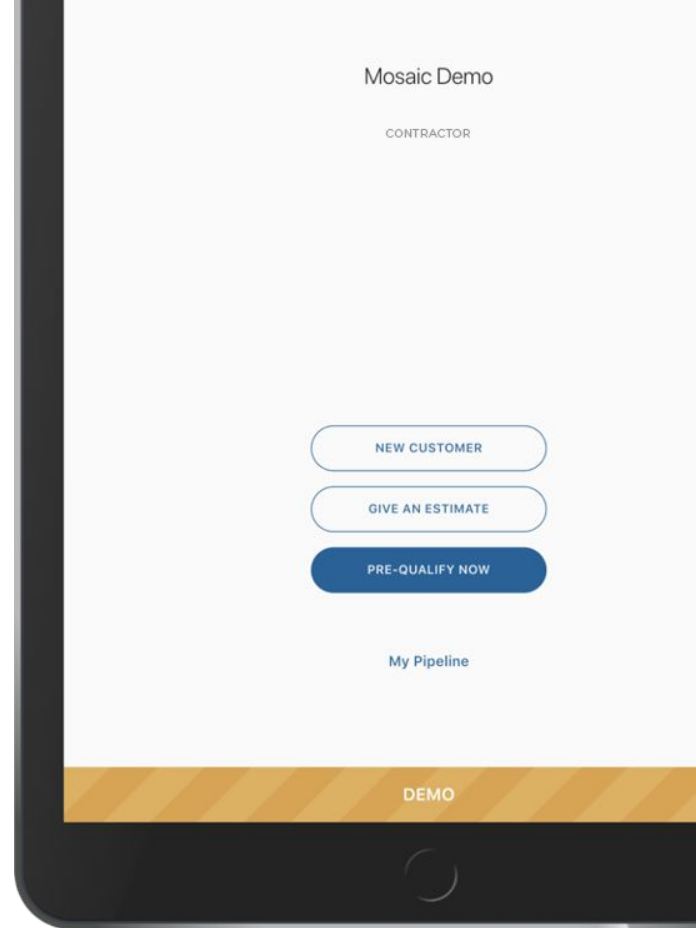


The Sales Process Goes from Estimate to Closing in a Few Clicks

Head to tap.joinmosaic.com 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.

Mosaic Home De... ?

Pre-qualification

SSL 128-BIT ENCRYPTION

Please provide a valid email address you can access and a mobile phone number to receive instant notifications about your project and keep it running smoothly.

Email address: demoemail@joinmosaic.com
Mobile phone number: (631) 873-8894

Disclosures

By clicking "Agree & Continue" below, you are consenting to the following disclosures as stated herein. You agree to the terms of this Calling/Text Messaging and Call Recording Consent. You agree that Solar Mosaic, Inc. and its assigns, successors, agents, representatives, vendors, and servicers, and its lending partners and their assigns, successors, agents, representatives, vendors, and servicers, (collectively, "we," or "us") may contact you at the number(s) you have provided on or with your application for credit or any other number you provide to us, including through automated telephone dialing and text messaging systems, to deliver messages or with the use of prerecorded and/or artificial voice. Among other reasons, we may contact you with information or questions about your account relationship, regarding your application(s) or current, future or past account(s), and regarding payments

AGREE & CONTINUE

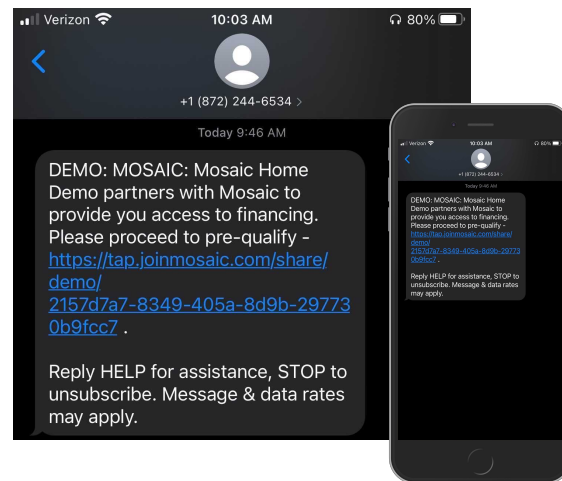
First name: _____ Last name: _____
Your legal name, not a nickname.

Personal Income (annual): \$XXX,XXX
Your annual pre-tax (gross) income. Alimony, child support, and separate maintenance income are optional. [Read more](#)

Social Security Number: 000-00-0000
Numbers only, no dashes

Date of birth: January 0, 0000

Finally, tell us where this project will be located. You can also provide a primary address and a mailing address if this project will not be at your primary address.



Completing the App

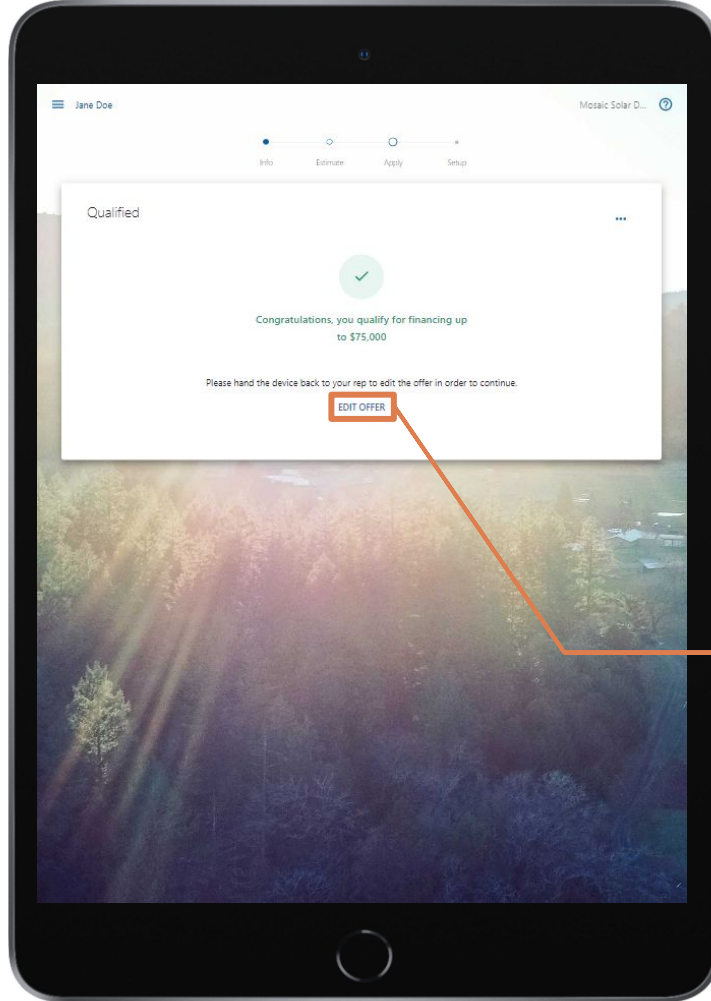
Once your customer agrees to receive text messages from Mosaic, they can continue to fill out their secured application on your device; or, if they prefer, they may also use their own device to access the application link that they received via text message.

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

The image shows a smartphone screen displaying a 'Pre-qualification' form. The form is titled 'Pre-qualification' and includes a security notice 'SSL 128-BIT ENCRYPTION'. The form contains the following fields and sections:

- Thanks! Please continue below. We also sent you a link in case you need to finish this later.**
- demoemail@joinmosaic.com** (with a lock icon) and **(631) 873-8894** (with a lock icon). Below these is the text: 'Add an alternate phone number if any.'
- Tell us a bit more about yourself. Don't worry, this pre-qualification will not make a hard inquiry on your credit.**
- First name:** Jane
- Last name:** Smith
- Your legal name, not a nickname:** (empty field)
- Personal Income (annual):** \$100,000
- Social Security Number:** 000-00-0000
- Your annual pre-tax (gross) income, alimony, child support, and separate maintenance income are optional. Read more.**
- Numbers only, no dashes:** (empty field)
- Date of birth:** January 0, 0000
- Finally, tell us where this project will be located. You can also provide a primary address and a mailing address if this project will not be at your primary address.**
- Project address:** 2800 North Central Avenue, Phoenix, AZ, 85004
- Project address use:** Primary residence
- Prefer to receive mail at a different address
- DISCLOSURE:** All Home Improvement Loans made by WebBank, Member FDIC. To help the government fight the funding of terrorism and money laundering activities, federal law requires all financial institutions to obtain, verify, and record information that identifies each person who opens an account. What this means for you: When you open an account, we will ask for your name, address, date of birth, and other information that will allow us to identify you. We may also ask to see your driver's license or other identifying documents.
- Authorization to Obtain Your Consumer Reports and Share Information**
- Electronic Communications Consent**
- Automated Calling/Text Messaging and Call Recording Consent**
- An Arbitration Provision**
- I agree to the Terms and Conditions listed above.
- SUBMIT** button
- Submitting this pre-qualification will not affect your credit score.**
- YOUR INFORMATION IS SECURED BY SSL 128-BIT ENCRYPTION**

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.

Creating an Estimate

Select the project type

- Solar
- Battery

Note: in order to add an additional project, click:

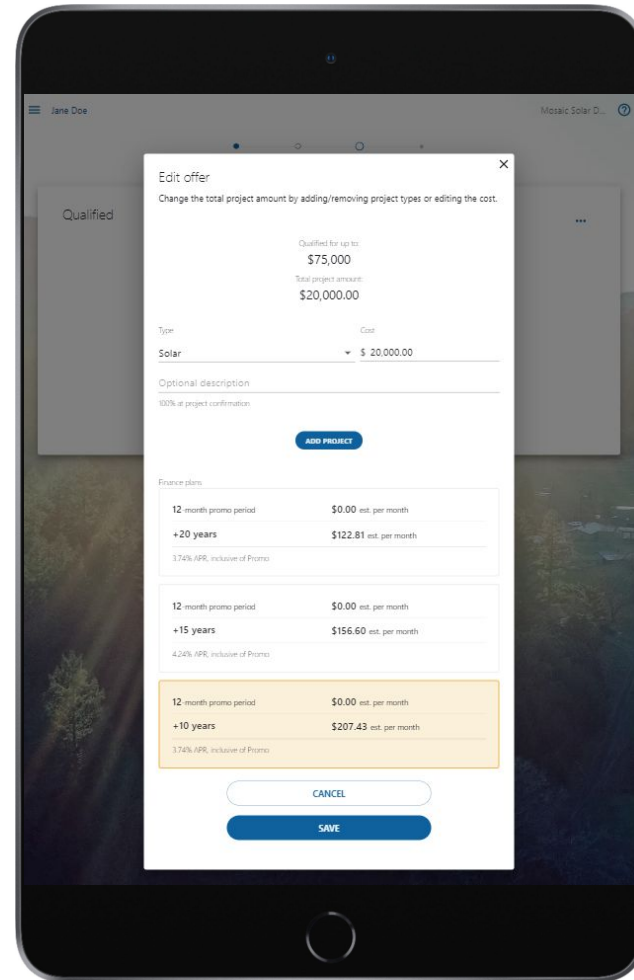
ADD PROJECT

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.

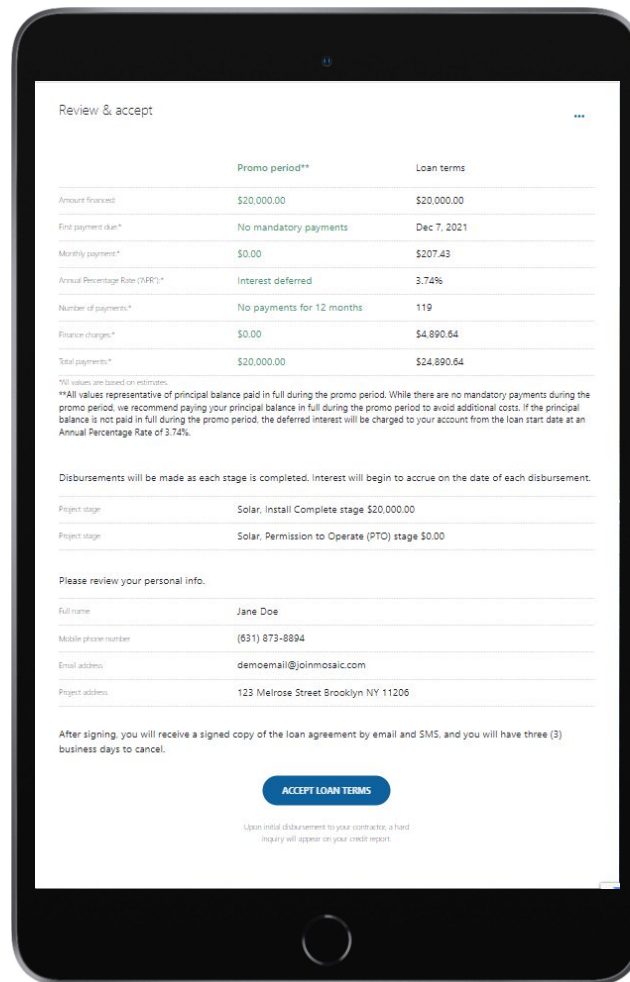
Homeowners receive rate card discounted APRs by signing up for automatic payments.



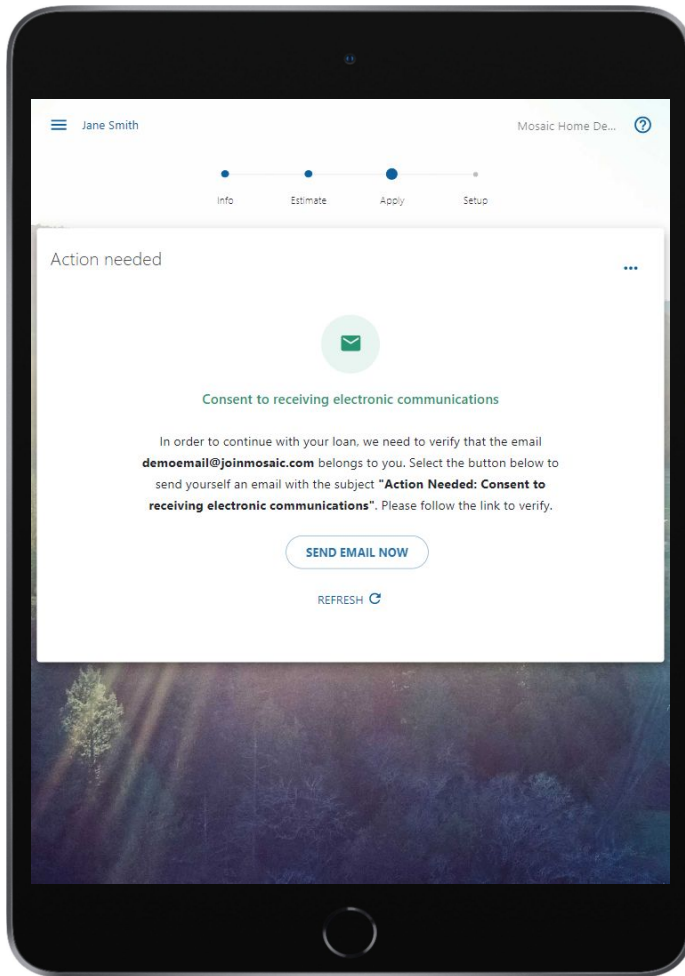
Reviewing Loan Terms

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.



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.

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.

Sales agreement ×

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

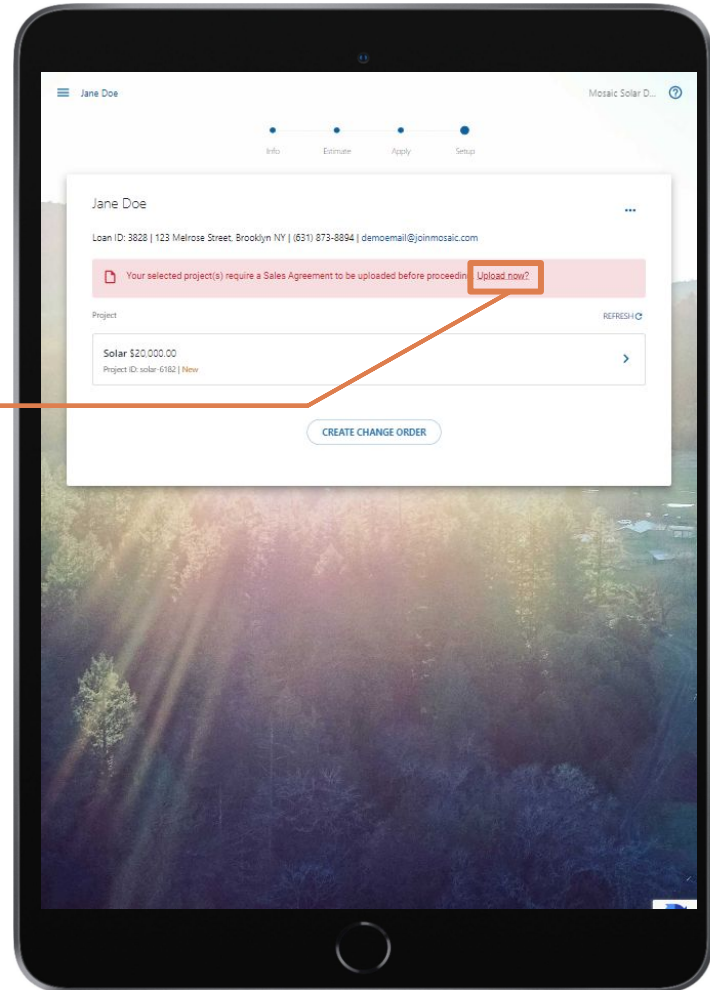
Select and upload file

[CHOOSE FILE](#)

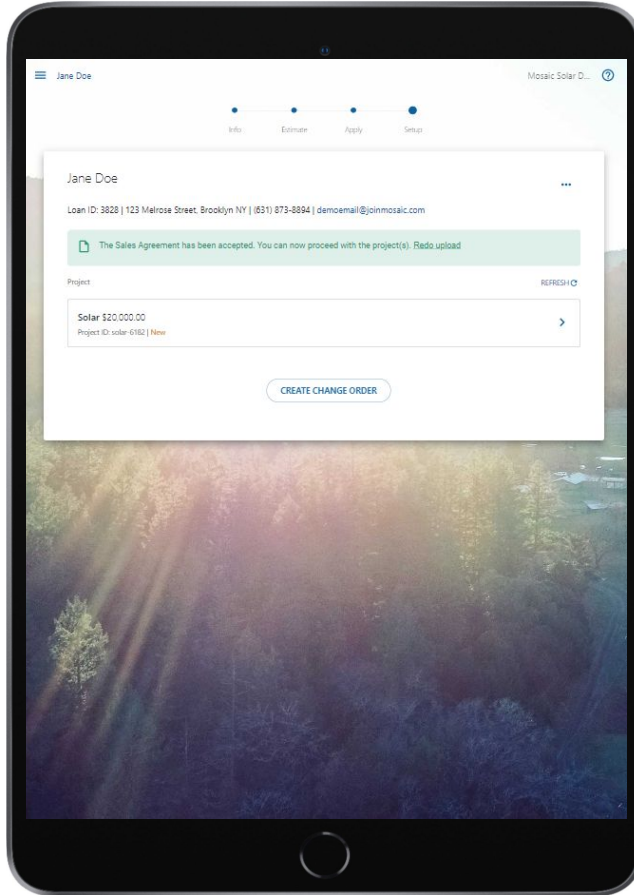
User name Jane Smith

Date and time July 24, 2020 10:17 AM PDT

CANCELSUBMIT



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.

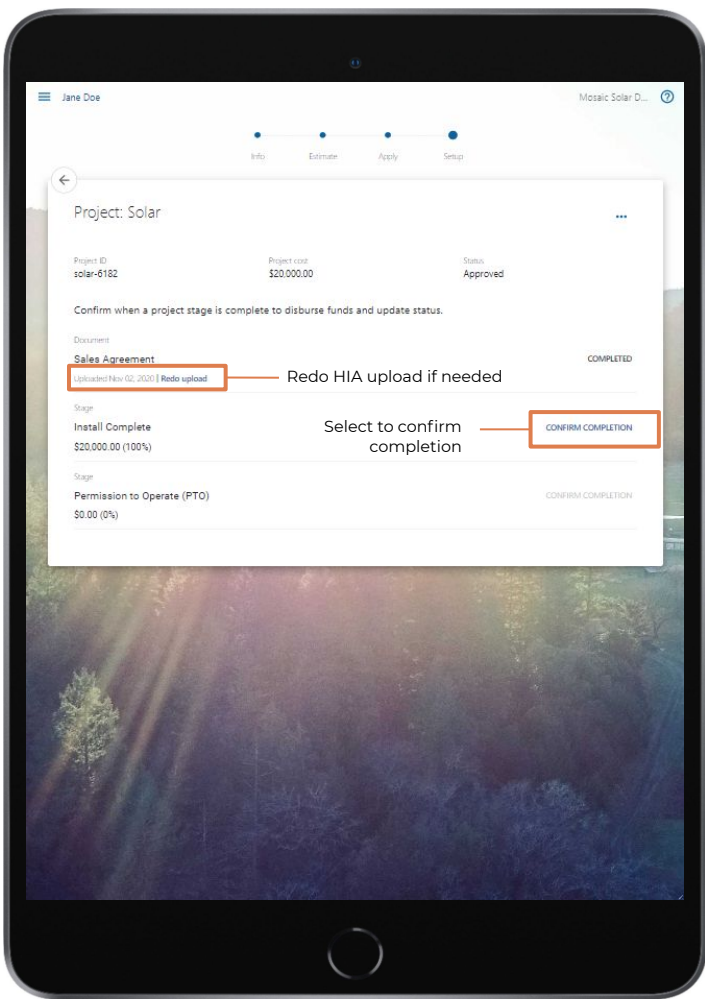
Note: If a change order is needed, you may select “Create Change Order” to begin the process.

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 ✕

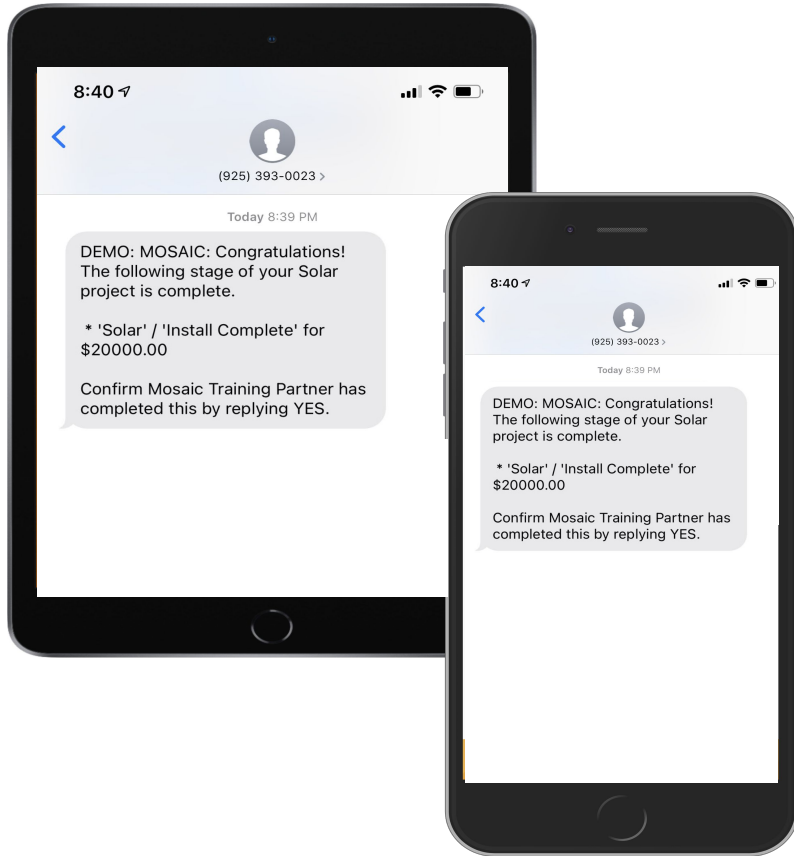
- ✓ Customer: Jane Smith
- ✓ Address: 123 Melrose St Brooklyn NY 11206
- ✓ Project name: Solar
- ✓ Stage name: Install Complete
- ✓ Stage cost: \$20,000.00

Send to (480) 479-3819

CANCEL

SEND NOW

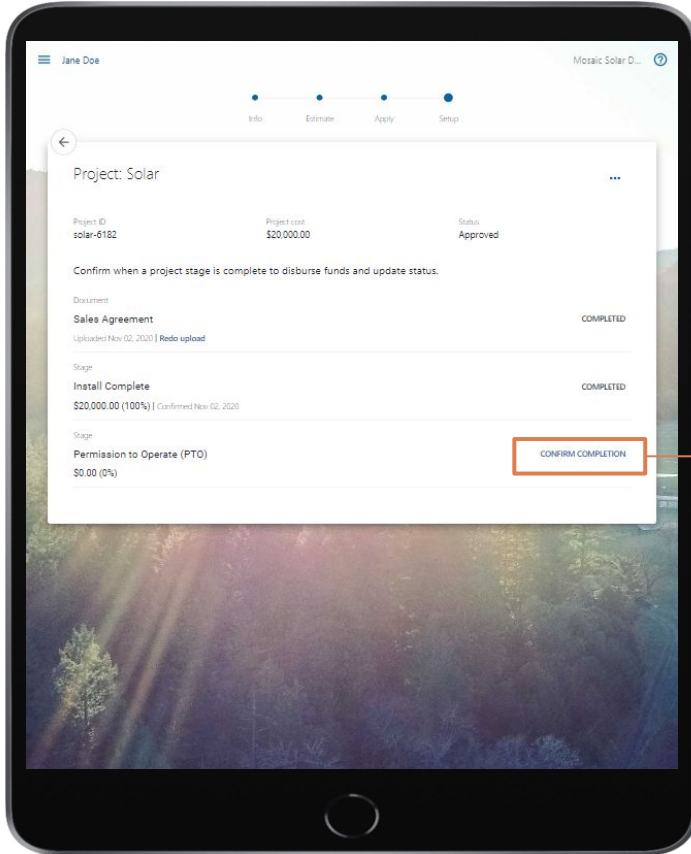
What Your Customer Sees



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



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.

A screenshot of the 'Permission to Operate (PTO) Document' upload screen. It features a title bar with a close button (X), a warning message, a metadata table, a file upload area, and a submit button. The metadata table lists project and customer information. The file upload area contains a 'SELECT AND UPLOAD FILE' button and a 'CHOOSE FILE' link. At the bottom, there are 'CANCEL' and 'SUBMIT' buttons, along with user and time information.

Permission to Operate (PTO) Document X

Please make sure this is the correct customer before uploading the **PTO document**

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
Date and time July 24, 2020 10:56 AM PDT

CANCEL **SUBMIT**