

# Payment Plan process

for Installers and Suppliers



Smart Ease®

STAGE	WHAT HAPPENS	DOCUMENTATION & INFO (required by Smart Ease)	TIMING	HOW
<b>1 PROPOSAL</b>	<p>Make calculations and show your Customer their monthly payments on a Smart Ease Payment Plan.</p> <p>You can vary inputs including term length, total value of equipment and email the PDF proposal to your Customer.</p>	<ul style="list-style-type: none"> <li>• Payment Plan type - rental or equipment loan.</li> <li>• Equipment details and cost (note: rental is ex GST, and equipment loan is incl GST).</li> <li>• Length of Term.</li> </ul>	Less than 1 minute.	<p>Use your registered email to login to: <a href="http://www.smartease.com.au/login">www.smartease.com.au/login</a> No password required.</p> <p>Click on <b>'Start a Proposal'</b>.</p>
<b>2 APPLICATION</b>	<p>For Payment Plans up to \$150k, submit your Customer's Application and get conditional approval within 5 minutes.</p>	<ul style="list-style-type: none"> <li>• Equipment details, cost and install address.</li> <li>• Customer's ABN (registered for 2+ years).</li> <li>• Director/Partner/Authorised Officer contact information (name, DOB, mobile, 2 years residential address &amp; ownership status on their home).</li> <li>• Bank account details (for direct debit set up) can be added later if not available.</li> <li>• If a Trust, Trustee name and ACN.</li> </ul>	<p>5 minutes to complete an Application.</p> <p>Instant conditional approval for up to \$150k*.</p>	<p>Use your registered email to login to: <a href="http://www.smartease.com.au/login">www.smartease.com.au/login</a> and click on <b>'Start an Application'</b>.</p> <p>For Payment Plans outside the criteria, Smart Ease will contact your Customer for further information.</p>
<b>3 SIGNING</b>	<p>Once the Application is submitted and is conditionally approved, you and your Customer receive an Agreement to download and sign via email.</p> <p>Your Customer can also sign the Agreement online using digital signature tool (Hellosign). Please note, <b>signing by stylus is not acceptable, nor inserting image of signature.</b></p>	<p>Agreement for signing.</p> <p>Note: If a non-personalised email is used for digital signing (e.g. info@ or accounts@) we require an email verification from Director/ Authorised officer confirming they have used this email to sign the Agreement.</p>	Sign on spot.	<p>To activate digital signing, click the <b>'Sign for'</b> button at the end of the Application process.</p> <p>Alternatively Customer will also have received an email from enquiries@smartease.com.au with the subject <b>Smart Ease Agreement - Sign Online</b>. Customer clicks on link within the email to activate digital signing.</p>

\*No financials or landlord waivers are required for transactions of less than \$150,000 ex GST.

All applications to Smart Ease (under the registered business name of Energy Lease Pty. Ltd.) are subject to normal approval criteria, and terms and conditions apply.

**If you need further guidance from our team, please call 1300 795 695.**

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<p><b>4</b></p> <p><b>APPROVAL &amp; INSTALLATION</b></p>	<p>Both you and your Customer will receive an email when the Agreement is formally approved. Once you receive this confirmation, you can schedule installation.</p> <p>You install the equipment and then send your invoice and supporting documents to Smart Ease.</p>	<p>1. Signed Agreement 2. Drivers License</p> <p>If any equipment has changed since the initial Application, this needs to be noted in the signed Agreement.</p> <p>Note for Equipment Loans:</p> <ul style="list-style-type: none"> <li>• If the applicant is a Trust please send a copy of the Trust Deed.</li> <li>• If the applicant is a Partnership, please send a Partnership letter confirming the percentage ownership of the partners.</li> </ul>	<p>Approval within 5 minutes to 24 hours of signing.</p> <p>Installation from next day to 3 months. (Note if longer period required, contact Smart Ease.)</p>	<p>Send your invoice and supporting documents to: <b>settlements@smartease.com.au</b> or upload into portal.</p> <p>Smart Ease follows up any outstanding supporting documents, eg Drivers Licenses and email verification with Customers/Suppliers between Approval and Settlement.</p>
<p><b>5</b></p> <p><b>SETTLEMENT &amp; ACTIVATION</b></p>	<p>You notify Smart Ease once the installation is complete.</p> <p>Smart Ease conducts a Settlement call with the Customer to confirm equipment has been received and installed.</p> <p>Typically Smart Ease processes your payment within 48 hours.</p> <p>Customer commences payment plan with Smart Ease.</p>	<ul style="list-style-type: none"> <li>• Tax Invoice and serial numbers of equipment (If available).</li> <li>• Copy of completed and signed Agreement from the Customer. (If there are changes to pricing or equipment).</li> <li>• Signed Certificate of Acceptance (COA).</li> <li>• Driver's License of Director/Guarantor (front and back).</li> </ul>	<p>24-48 hours after documents received by Smart Ease.</p>	<p>Once you confirm installation, Smart Ease's team will commence the Settlement process.</p>

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