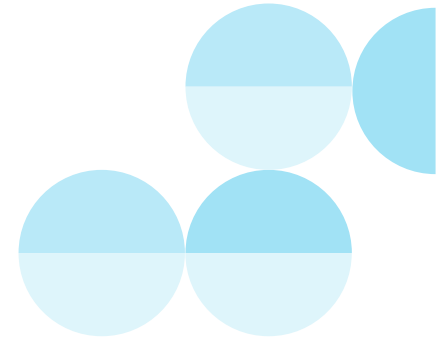




## Payment Plan process for Channel Partners



| Stage                          | What happens   | Documentation & info<br>(required by Smart Ease)  | Timing  | How   |
|--------------------------------|--|---|---|---|
| <b>1</b><br><b>Proposal</b>    | <p>Make calculations and show your customer their monthly payments on a Smart Ease Payment Plan. 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 chattel mortgage.</li> <li>• Equipment details and cost. (Note: Rental is ex GST and chattel mortgage is inc GST.)</li> <li>• Length of term.</li> </ul>   | <p>Less than 1 minute.</p>  | <p>Go to the Channel Partner portal:<br/> <a href="https://paymentplan.smartease.com.au/account/login">https://paymentplan.smartease.com.au/account/login</a></p> <p>Enter your registered email address under 'Transact'. No password required.</p> <p>Click on <b>Start a Proposal</b>.</p>   |
| <b>2</b><br><b>Application</b> | <p>For Payment Plans up to \$150k*, submit your customer's application* in under 4 minutes and get conditional approval within 5 minutes.</p>  | <ul style="list-style-type: none"> <li>• <b>Equipment details, cost and install address.</b></li> <li>• <b>Customer's ABN</b> (registered for 2+ years).</li> <li>• <b>Director/Partner/Authorised Officer contact information</b> (name, DOB, mobile, 2 years residential address and ownership status on their home).</li> <li>• <b>Bank account details</b> (for direct debit set up) can be added later if not available.</li> <li>• If a Trust, Trustee name and ACN.</li> </ul> | <p>4 minutes to complete an application.</p> <p>Instant conditional approval for Payment Plans up to \$150k*.</p> | <p>Go to the Channel Partner portal:<br/> <a href="https://paymentplan.smartease.com.au/account/login">https://paymentplan.smartease.com.au/account/login</a></p> <p>Enter your registered email address under 'Transact'. No password required.</p> <p>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</b><br><b>Signing</b>     | <p>Once the application is submitted and is conditionally approved, you and your customer receive an email with subject line: Smart Ease Agreement.</p> <p>Within this email is a link that will take you to a login page. You will be asked to enter your mobile number and to sign via Hellosign digital signature tool.</p> <p><b>Please note, signing by stylus is not acceptable, nor inserting image of signature.</b></p> | <p><b>Agreement</b> 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 or authorised officer confirming they have used this email to sign the agreement.</p>  | <p>Sign on the spot.</p>  | <p>To activate digital signing, click the '<b>sign for</b>' button at the end of the application process.</p> <p>Alternatively, customer will have also received an email from enquiries@smartease.com.au with the subject: <b>Smart Ease agreement - sign online</b>.</p> <p>The customer can click on the link within the email to activate digital signing.</p>  |

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| Stage   | What happens  | Documentation & info<br>(required by Smart Ease)  | Timing  | How   |
|---|---|---|---|---|
| <p><b>4</b></p> <p><b>Approval &amp; Installation</b></p> | <p>Upload supporting documentation (eg Drivers Licence).</p> <p>Both you and your customer will receive an email when the agreement is formally approved.</p> <p>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> | <ul style="list-style-type: none"> <li>• <b>Driver Licence</b> of Director or Guarantor (front and back)</li> <li>• <b>Signed agreement.</b> If any equipment has changed since the initial application, this needs to be noted in the signed agreement.</li> <li>• <b>Trust Deed (for chattel agreements)</b><br/>If the applicant is a Trust please send a copy of the <b>Trust Deed</b>.</li> <li>• <b>Partnership letter (for partnerships):</b> If the applicant is a partnership please send a partnership letter confirming the percentage ownership of the partners. Smart Ease can provide you with a partnership letter template on request.</li> </ul> | <p>Approval within 5 minutes to 24 hours of signing.</p> <p>Installation from next day to 3 months.</p> <p>Note: If longer period required, contact Smart Ease.</p> | <p>Smart Ease follows up any outstanding supporting documents (eg driver license and email verification with customers or suppliers) between approval and settlement.</p> <p>Send supporting documents to <a href="mailto:docs@smartease.com.au">docs@smartease.com.au</a> or upload into the portal.</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 settlements team conduct a settlement call with the customer to confirm equipment has been received and installed.</p> <p>Smart Ease typically processes your payment within 48 hours.</p> <p>Then, customer commences Payment Plan with Smart Ease.</p>      | <ul style="list-style-type: none"> <li>• <b>Tax invoice</b> and serial numbers of equipment (if available).</li> <li>• <b>Updated agreement.</b> If any equipment or pricing has changed since the agreement was formally approved, this needs to be updated and initialled by the customer in the signed agreement and provided to <a href="mailto:docs@smartease.com.au">docs@smartease.com.au</a></li> <li>• <b>Signed Certificate of Acceptance (COA).</b></li> </ul>   | <p>24-48 hours after documents received by Smart Ease.</p>  | <p>Send your invoice and supporting documents to <a href="mailto:docs@smartease.com.au">docs@smartease.com.au</a> or upload into portal.</p> <p>Once you confirm installation, Smart Ease's Settlement team will commence the settlement process.</p>   |

All applications to Smart Ease, trading as Energy Lease Pty. Ltd. are subject to approval criteria, and terms and conditions apply. \* No financials or landlord waivers are required for transactions of less than \$150,000 ex GST.

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

[enquiries@smartease.com.au](mailto:enquiries@smartease.com.au) • [smartease.com.au](http://smartease.com.au)