SMT

NEW SERVICE COMPANY GUIDE
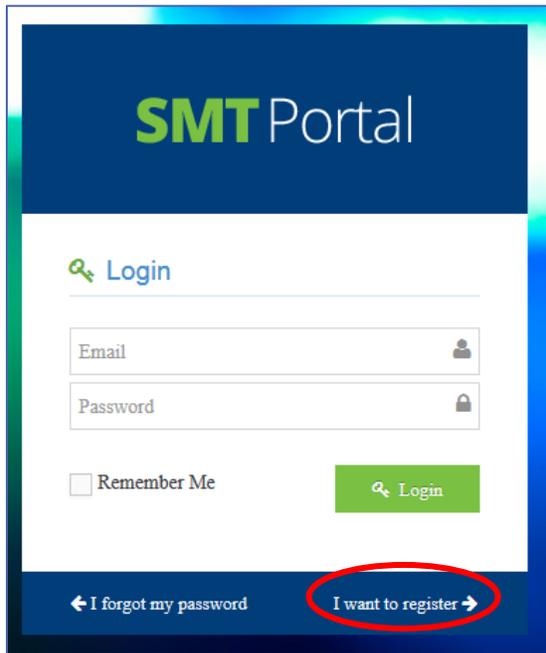
CONTENTS

CREATING YOUR SMT ACCOUNT

A service company interested in joining the NAL Group network is able to set up an account in SMT. This account will allow the company view and manage their application process.

1. Navigate to **https://smt.installs.com** in a web browser.
2. Below the login screen, click on "**I want to register**."

3. This loads the "New User Registration" page. Complete all required fields. **Note:** Please enter the contact information you would like NAL Group to use to reach out regarding your application.
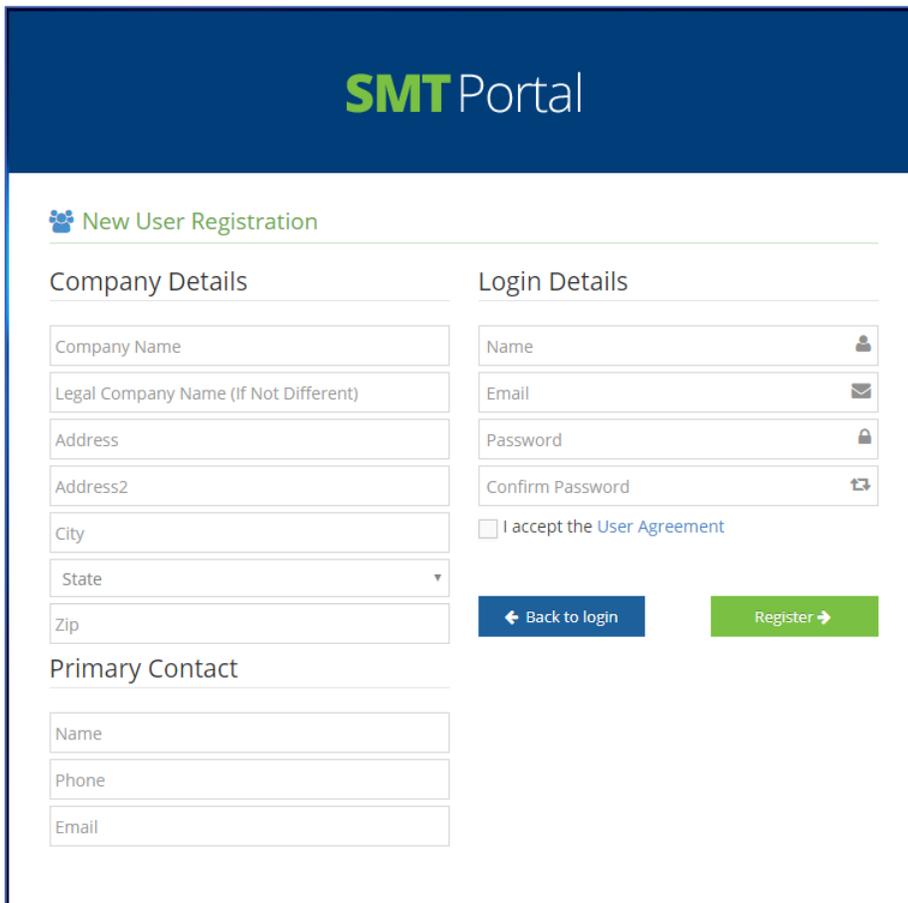
SMT Portal

New User Registration

Company Details

Company Name	
Legal Company Name (If Not Different)	
Address	
Address2	
City	
State	▼
Zip	

Primary Contact

Name
Phone
Email

Login Details

Name	👤
Email	✉
Password	🔒
Confirm Password	⇄

☐ I accept the User Agreement

← Back to login   Register →

4. You will see a message stating "Please confirm your email to complete registration." Log in to the email account you used for your Login Details. You should receive an email from "Installs Inc". Open the email and click the link to confirm your email address.
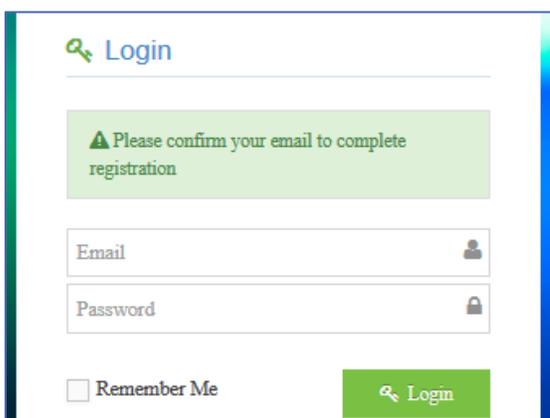
🔑 Login

⚠ Please confirm your email to complete registration

Email	👤
Password	🔒

☐ Remember Me   🔑 Login

UPLOADING NEW FORMS

1. Click on the **Compliance** section. You will see all required items and be able to see the status of each of those items. **Note:** Auto Insurance is submitted under "**Vehicles**"
2. Click on type of document you would like to update.

Types of Compliance Documents

3. Click on **Add New.** This will load the form entry page.

4. Complete all required fields with up-to-date information.
5. Then, use the upload options to submit the new version of documents.
6. Click **Submit** when all fields are complete.
   Note: You can save a partially completed form. Click **Save** if all required fields marked ** are not complete. You can complete the form later.

Company ID: **Territory:** 5 **Market:** PITTSBURGH **Status Date:** 2017-10-10

Key: *Denotes Required for Save ** for Submit*

Insurance Company Name *

Liability Amount **

Expiration Date ** | Date

Installs Listed as Additional Insured ** | ○ Yes ○ No

Upload Certificate of Insurance ** | No File... | Choose

Required Fields

Example Certificate

Upload new documents

Upload Insurance Policy | No File... | Choose

Save | Submit

UPLOADING SERVICER SPECIFIC DOCUMENTS

Some compliance documents are entered under the specific servicer to which they apply. Each servicer who performs work for NAL Group clients should have an entry in SMT. If you need help entering these individuals, please speak to your Market Manager or TRA for assistance.

1. Click on **Servicers**
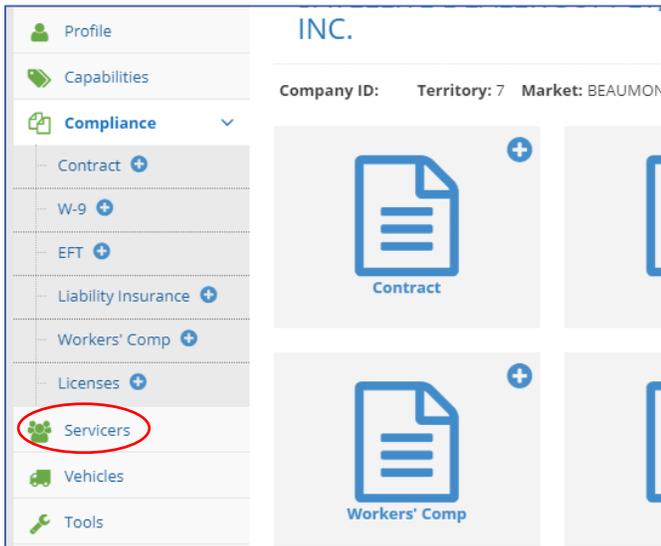
2. Click on the **Servicer's Name**

3. Click on **Compliance**
4. Choose the **type of document** you would like to submit

5. Complete all required fields with up-to-date information.
6. Then, use the upload options to submit the new version of documents.
7. Click **Submit** when all fields are complete.
   Note: You can save a partially completed form. Click **Save** if all required fields marked ** are not complete. You can complete the form later.

WHERE TO UPLOAD

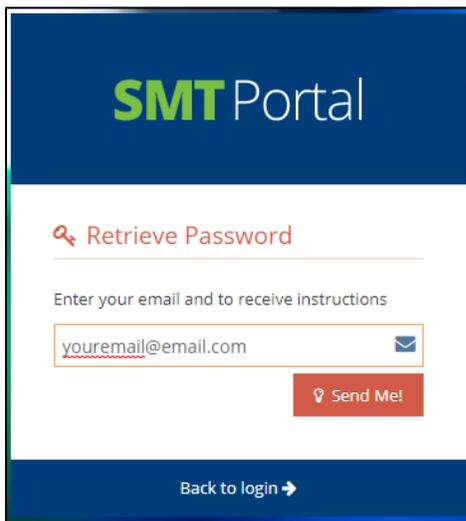| Location	Document Type
Compliance > Contract	• Master Agreement for Professional Services (contract)
Compliance > W-9	• W-9 Form
Compliance > EFT	• EFT Form
Compliance > Liability Insurance	• General Liability Insurance
Compliance > Worker's Comp	• Company level Worker's Compensation Insurance or Worker's Comp Waiver
Compliance > Licenses > License Category > Other	• All required local, state, and federal licenses • Certifications • State documents that prove a corporation has been formed
Vehicles	• Auto Insurance • Vehicle Photos
Servicers > Name > Profile	• Headshots
Servicers > Name > Compliance > Criminal Background Check	• NAL Group Background Check • Lowe's Background Check
Servicers > Name > Compliance > MV Background Check	• Driver Background Check
Servicers > Name > Compliance > Drug Background Check	• Drug Screening Information

Note: Servicers will receive an email from "Installs Inc" when their Liability Insurance, Auto Insurance, or Worker's Comp insurance are 10 days from expiration and again when the documents expire. Servicers should use the emails as reminders to upload new, non-expired documents to SMT

RESETTING YOUR PASSWORD

1. Click the "I forgot my password" link on the login screen
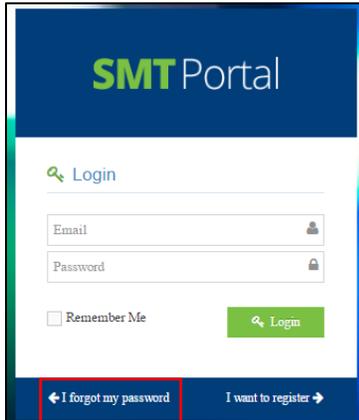
2. Enter the email address you used as your username.
3. You will receive an email from Installs Inc with a link to reset your login
4. Click the link and follow the prompts to reset your password