

SMT

NEW SERVICE COMPANY GUIDE

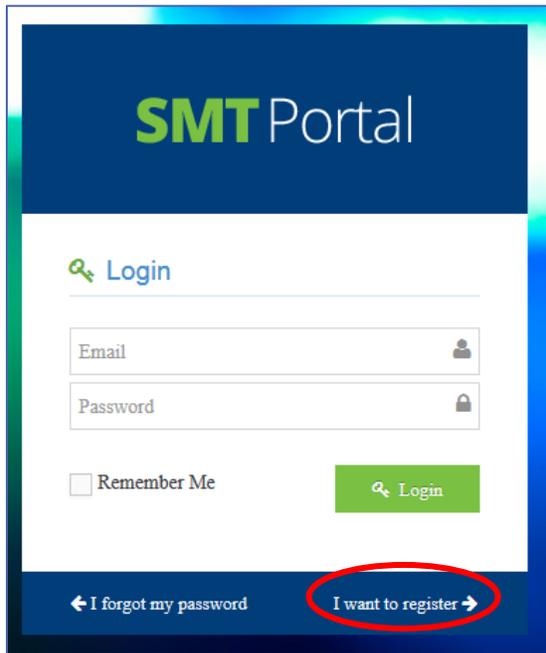
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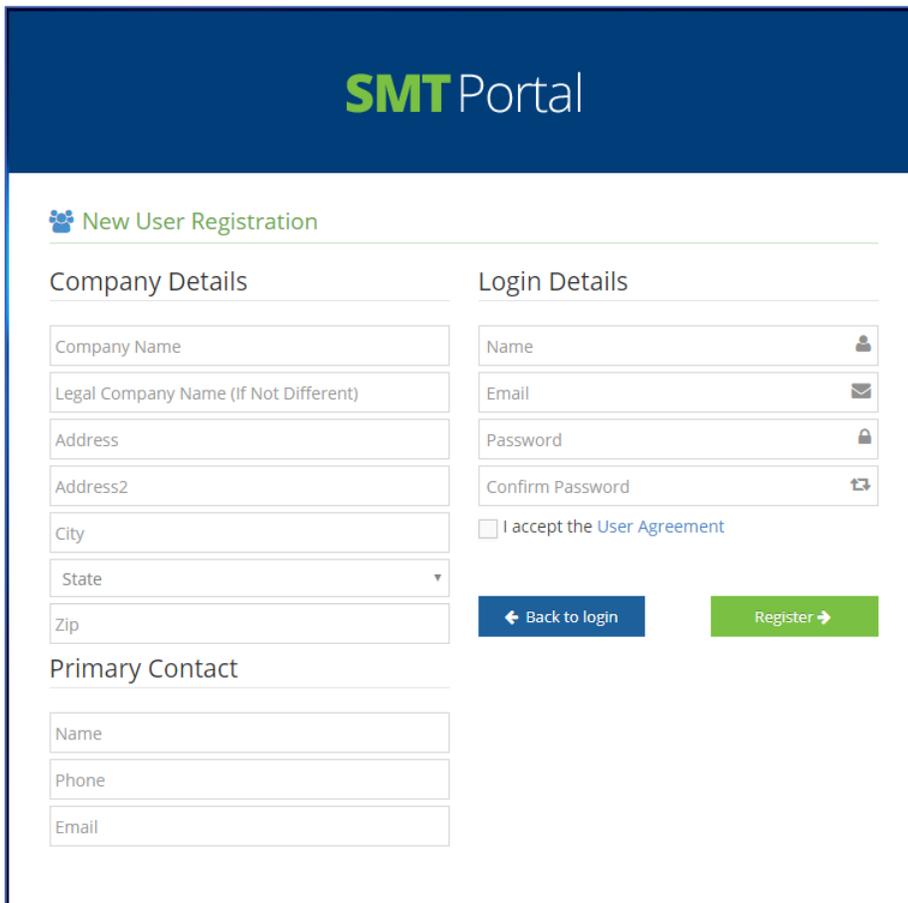
CREATING YOUR SMT ACCOUNT

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.”

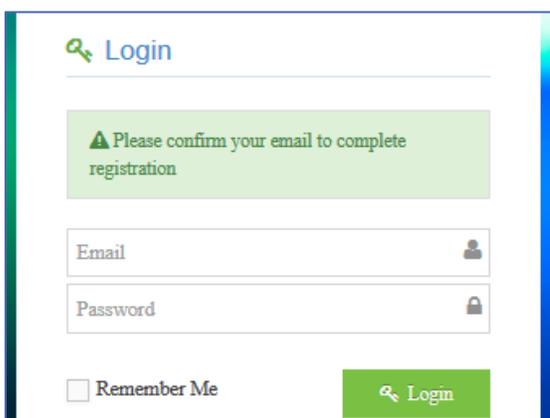


3. This loads the “New User Registration” page. Complete all required fields. **Note:** Please enter the contact information you would like NAL Group to use to reach out regarding your application.



The screenshot shows the 'SMT Portal' header in a dark blue bar. Below it, the page title is 'New User Registration' with a small icon. The form is divided into two columns: 'Company Details' and 'Login Details'. The 'Company Details' column contains input fields for 'Company Name', 'Legal Company Name (If Not Different)', 'Address', 'Address2', 'City', 'State' (a dropdown menu), and 'Zip'. The 'Login Details' column contains input fields for 'Name', 'Email', 'Password', and 'Confirm Password', each with an icon representing its type (person, envelope, lock, and refresh). Below these fields is a checkbox labeled 'I accept the User Agreement'. At the bottom of the form are two buttons: a blue 'Back to login' button and a green 'Register' button with a right-pointing arrow. Below the main form is a 'Primary Contact' section with input fields for 'Name', 'Phone', and 'Email'.

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.



The screenshot shows the 'Login' page. At the top left is a magnifying glass icon and the word 'Login'. Below this is a green message box with a warning triangle icon and the text: 'Please confirm your email to complete registration'. Underneath the message are input fields for 'Email' and 'Password', each with an icon (person and lock). At the bottom left is a checkbox labeled 'Remember Me'. At the bottom right is a green button with a magnifying glass icon and the word '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.

Home > Service Companies > Quick n Right > Compliance Details

Company Home | Profile | Capabilities | **Compliance** | Contract | W-9 | EFT | Liability Insurance | Workers' Comp | Licenses | **Vehicles** | Tools | Performance

Quick n Right | Category: New Lead | Status: Inactive | Details: Not Called | Percent Complete: 0%

Company ID: 500108 | Territory: 1 | Market: BUFFALO | Status Date: 2016-09-14

Contract | W-9 | EFT | Liability Insurance | Workers' Comp | Licenses

Types of Compliance Documents

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

Fast Install | Category: New Lead | Status: Inactive | Details: Not Called | Percent Complete: 0%

Company ID: 500107 | Territory: 1 | Market: JOHNSTOWN-ALTOONA | Status Date: 2016-09-13 | No Company User Assigned

Add New

Document ID	Status	Company Name	Date Received	Date Approved	Expiration Date	
65		Fast Install	2016-09-13			

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 **

Installs Listed as Additional Insured ** Yes No

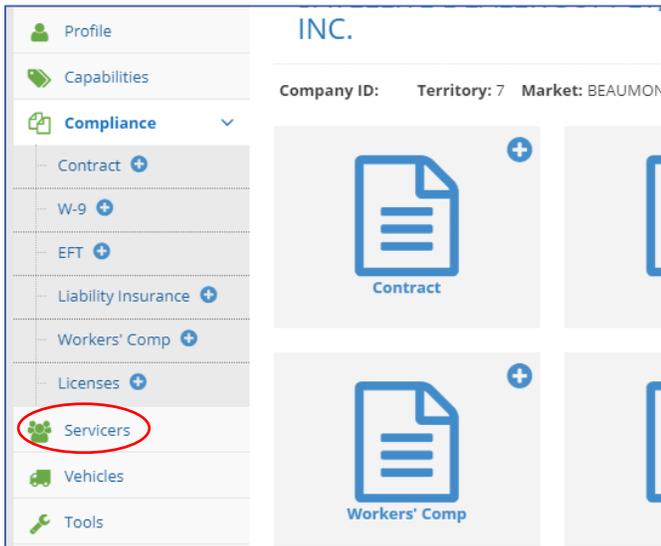
Upload Certificate of Insurance **
[Example Certificate](#)

Upload Insurance Policy

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.

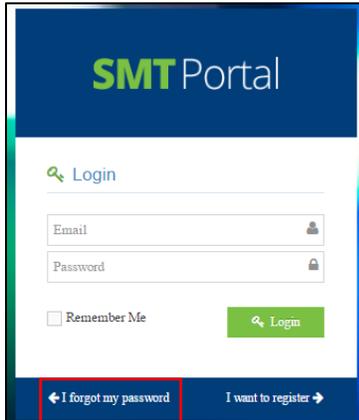
WHERE TO UPLOAD

Location	Document Type
Compliance > Contract	<ul style="list-style-type: none"> • Master Agreement for Professional Services (contract)
Compliance > W-9	<ul style="list-style-type: none"> • W-9 Form
Compliance > EFT	<ul style="list-style-type: none"> • EFT Form
Compliance > Liability Insurance	<ul style="list-style-type: none"> • General Liability Insurance
Compliance > Worker's Comp	<ul style="list-style-type: none"> • Company level Worker's Compensation Insurance or Worker's Comp Waiver
Compliance > Licenses > License Category > Other	<ul style="list-style-type: none"> • All required local, state, and federal licenses • Certifications • State documents that prove a corporation has been formed
Vehicles	<ul style="list-style-type: none"> • Auto Insurance • Vehicle Photos
Servicers > Name > Profile	<ul style="list-style-type: none"> • Headshots
Servicers > Name > Compliance > Criminal Background Check	<ul style="list-style-type: none"> • NAL Group Background Check • Lowe's Background Check
Servicers > Name > Compliance > MV Background Check	<ul style="list-style-type: none"> • Driver Background Check
Servicers > Name > Compliance > Drug Background Check	<ul style="list-style-type: none"> • Drug Screening Information

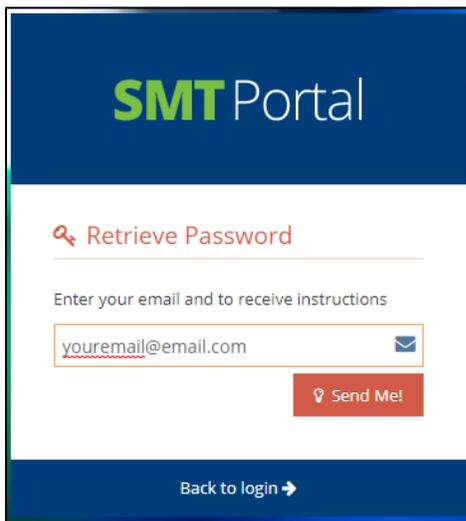
Note: Servicers will receive an email from “Installs Inc” when their Liability Insurance, Auto Insurance, or Worker’s Comp insurance are 10 days from expiration and again when the documents expire. Servicers should use the emails as reminders to upload new, non-expired documents to SMT

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



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