

Digital Welcome Checklist: A Step-By-Step Guide



Introducing the New Digital Welcome Checklist (DWC)

To improve the onboarding of new customers, EverBright is transitioning from the traditional welcome call to a more streamlined, digital, self-service process for the homeowner.

Like the traditional welcome call, the new Digital Welcome Checklist guards against fraud and ensures the customer is signing an agreement they fully understand. The questions provide safeguards to verify the person signing the document is who they say they are and that they understand their agreement.

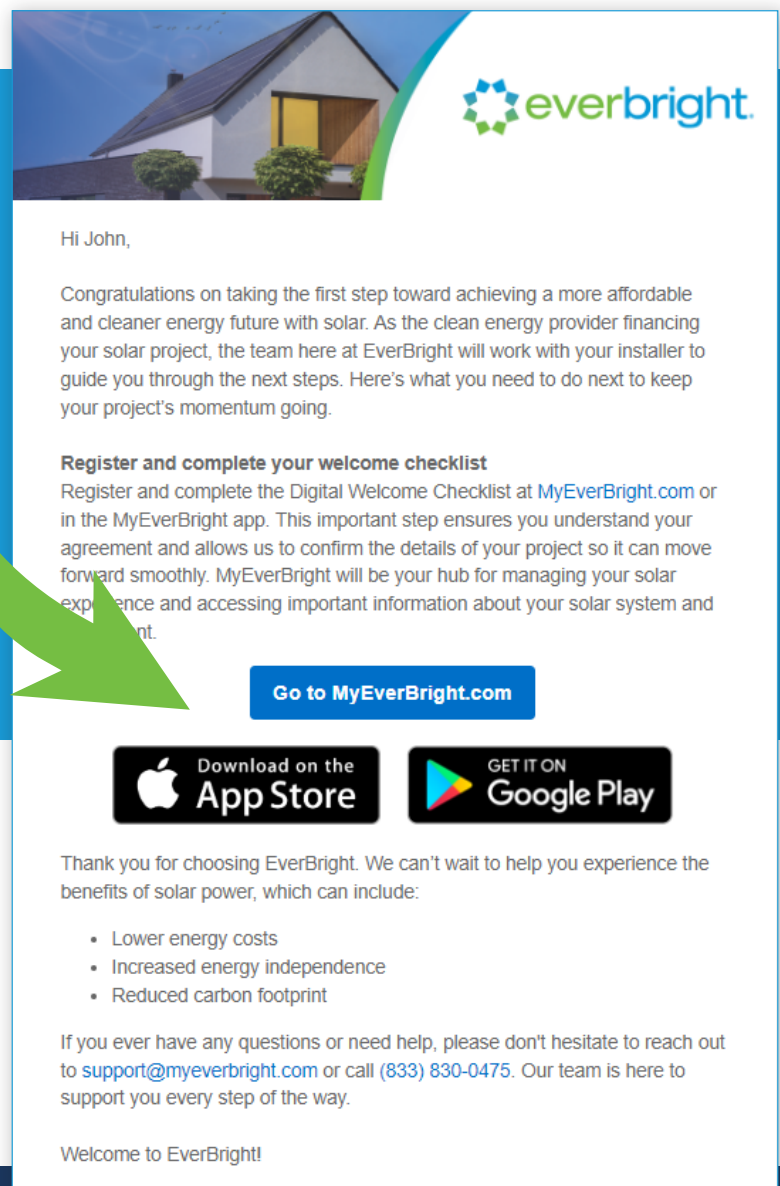
STEP 1: What Does the Homeowner Need to Do First?

When a homeowner signs an EverBright agreement, an account is created and the MyEverBright homeowner portal immediately sends a welcome email to the homeowner.

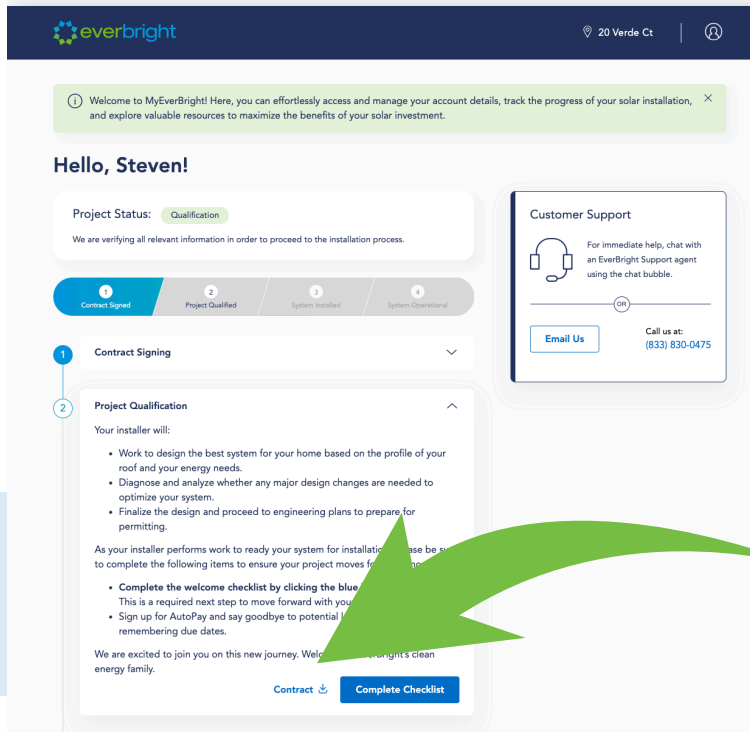
STEP 2: Registering for the Homeowner Portal

Within the email are instructions for registering for the homeowner portal via the blue MyEverBright button or downloading the app, and then completing the Digital Welcome Checklist. Once the homeowner has registered and logged in, they will be invited to complete the Digital Welcome Checklist by clicking a blue button titled "Complete Checklist" (see graphic in Step 3 on next page).

If you have questions, call our support team at **(877) 465-2496**, chat with us through the EverBright platform, or email us at support@goeverbright.com.



Complete the Digital Welcome Checklist



STEP 3: Friendly and Timely Reminders

If the homeowner does not register for MyEverBright, a reminder email will be sent three days later. The homeowner will be sent two more reminders to register for MyEverBright in three-day increments.

If the homeowner registers but does not complete the DWC, they will be reminded to do so two days later. If they still do not complete the DWC, another reminder will be sent two days after that first reminder.

If needed, the homeowner can click the "Contract" button to download their agreement for reference when completing their welcome checklist.

If the homeowner fails the DWC, one email reminder will be triggered.

STEP 4: Just Answer "Yes" or "No"

To complete the Digital Welcome Checklist, the homeowner must select "Yes" or "No" for each of the questions. Failing to do so will result in an error when trying to continue. After answering all questions, the homeowner will be required to review their answers before submitting.

Please answer 'Yes' or 'No' to the following statements	Yes	No
The address where the solar system will be installed is 20 Verde Ct , Chico, CA 95973.	<input type="radio"/>	<input type="radio"/>
My phone number is 5615105108 and my email address is test+dwc@goverbright.com.	<input type="radio"/>	<input type="radio"/>

If the homeowner passes the welcome checklist, the pop-up window will close automatically and a "thank you" message will be displayed. In the case of a failure, a message will appear instructing the homeowner to call EverBright customer support for help. An agent will answer questions and can assist with the DWC by phone if preferred. Once the homeowner passes the digital welcome checklist, the operations phase is updated, and you can submit M1 at any time.



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