

Sales Rep User Requirement

Sales reps must have a user account with GoodLeap in order to submit leases and PPAs. The first name, last name, email, phone number, and salesperson license # (where required by state law) of the sales rep user are required to be populated on the agreement and will not generate without the necessary data.

Required Tasks

1. Invite your sales reps to Origin (tip: use the bulk invite feature).
 - Please use the same email address your sales reps use in your proposal tool integrators.
 - Bonus: If the sales rep email matches existing submissions for your organization, sales reps will be able to view and manage them in Origin and Pros.
 - Note: By request, GoodLeap can provide a list of sales reps who have submitted loans for your organization in the last 90 days
2. If applicable, fix sales reps with missing and incomplete user profiles (typically older legacy users)
 - GoodLeap will provide a list of user emails that have missing or incomplete user profiles. Check to ensure these emails belong to people who should have access to TPO then:
 - Correct the data via the Origin User Management page, or
 - Prompt the users to update their Origin profiles

Service Admin / Authorized Signer Best Practice

Service admins will be required to sign several documents in Origin. Only the people authorized to sign for your company should have the Origin role of *Service Admin*.

Required Task

1. Any Service Admins that are not authorized to sign for your company should re-assigned a different role in Origin. You may want to refer to the authorized signer list that is part of the onboarding package.