

Aqua New Portal Application Process (For Technicians)

Sign into New Portal

- You should have received an email-Username is First Name Last Initial-ex-johnd.
 - From email click link and then hit “forgot password”-enter username and click continue
 - Verify your identity-go to work email to get code and enter code and then make your own password-one you will remember
 - Pick two security questions/answers-it will automatically log you out
- Go to aquafinance.com and click the NEW Orbit Portal up at the top and login
 - Bookmark the portal on your iPad

Customer Application

- You MUST fill out the application for the customer, do NOT hand your iPad to them to fill out.
- Click Create New Application and fill out all information-all fields with a blue dot are required fields-Please remember to get a good email address from applicant AND co-applicant as Aqua uses e-signatures and will use this email
- If there is a co-applicant, select co-applicant at bottom of first page
- Loan Parameters-ALWAYS put Revolving as loan type (We can change it to Closed End on our end, but we cannot change a Closed End to revolving on our end)
- Amount Financed-MUST be exact amount of invoice
- Terms-List lowest Payment Factor available and “Tentative” Install Date-Both of these things can be changed on our end.
- Review Application and hit submit-it will take you to the Recently Submitted applications page and will then take 40-60 seconds to either Approve or Decline the application-if it takes longer call Jahnava.

After Approval

- Call Jahnava-I will give you two different options to give the customer and they will get to pick which rate they would like to go with.

- ACH Bonus- PLEASE DO THIS! We get 2% more on the bid if we can get the customers Bank Information for automatic payments. Get their Routing number and Account number and give it to me when you call.
- On estimate make sure to list Aqua Financing and the rate they chose
- Task Install Coordinator to schedule install and make sure to include in task "Aqua Financing".

Financing Info-in Pricebook under Financing at bottom of the page is Aqua information including this process.