

## HahaSmart & Goodleap Integration Guide 2-8-2023

### Introduction

We are excited to announce the integration of our platform with Goodleap. This new feature allows our users to seamlessly connect with Goodleap and access Loan Application/Loan Management services directly from our platform.



### Integration Overview

With the fully integrated system, users on HahaSmart can achieve the following operations.

Goodleap Integration	HahaSmart Cashflow Channel	Self Finance Channel
1. Ready to use	√	<i>Setup Needed</i>
2. Real-time offers & pricing	√	√
3. Submit loan application	√	√
4. Instant loan decision	√	√
5. Real-time updates for status	√	√
6. Homeowner max loan amount	√	√
7. Cashflow project follow-up	√	×
8. Loan details & timeline	√	√
9. Change order	√	√
10. Send loan documents to Homeowner	√	√
11. Enter/update project info	√	√
12. Confirm loan details	√	√
13. Upload documents & Contract	√	√
14. Request funding	<i>By HahaSmart Team</i>	√
15. Cancel loan	<i>By HahaSmart Team</i>	√
16. HahaSmart support team	<i>Fast Track</i>	<i>By Schedule</i>
17. HahaSmart Cashflow Sponsor	√	×

## Channel Options

### ■ HahaSmart finance channel.

Qualified contractors that have joined HahaSmart Cashflow Sponsor Program can take advantage of all the benefits the integration has to offer by Joining HahaSmart Finance Channel.

1. You can submit the application for the Goodleap loan with one click, right from HahaSmart Loan Application section or under their online pipeline.
2. Your customer will get their credit decision immediately in the same browser window.
3. on the loan detail page, you can submit stipulation documents and enjoy an easy loan management process from the very beginning to NTP.
4. HahaSmart will automatically pass all customer and project information over to Goodleap, eliminating the time, effort, and potential for error associated with repeat data entry.
5. HahaSmart PM team and IT support team are ready to serve you and make your loan a success.

### ■ Self finance channel.

If you have an existing API account with Goodleap, you can apply to connect it to our platform by submitting a request on HahaSmart portal. HahaSmart serves as your software solutions only.

1. Simply navigate to the **Company Profile** page under the **Frontpage** tab.
2. Then scroll down to the Finance API Account Setting section.
3. Select the finance company (Goodleap) and click on “Learn More” button to start filling out the form.
4. Once finished, our IT support team will contact you to confirm details and set up your account.
5. Select “Use Your Own Finance Channel” when submitting loan applications.

## Loan Management

1. You will get a decision back immediately after submitting the loan application. Then click on the **Show Detail** button to open the loan detail page.
2. The loan detail page provides you with a full picture of loan information and steps needed to complete from the beginning of a loan to PTO.
3. If there is any stipulation for the loan, please switch to the **Stipulation** tab and check the Open List, select, and upload the supporting evidence to proceed.
4. On the right-hand side, there is a **Timeline** which will help you easily track the status for a loan and what is the next step.
5. Don't forget to check the **More actions** button on the right top. You can find all the buttons you need for loan management from the drop-down menu here:
  - i. Send loan docs
  - ii. Upload contract
  - iii. Enter project Info
  - iv. Verify loan details
  - v. Change Order
  - vi. Transition a Milestone

## Support

If you have any questions or issues with the Goodleap API integration, our support team is here to help. Please reach out to us at:

1. [lourdes@hahasmart.com](mailto:lourdes@hahasmart.com) (Software Demo/ Training)
2. [cs@hahasmart.com](mailto:cs@hahasmart.com) (Project-related customer service)
3. [techsupport@hahasmart.com](mailto:techsupport@hahasmart.com) (Tech Support)

## Disclaimer

We have taken great care to ensure the accuracy and reliability of the integration. By using the Goodleap API services through our platform, you acknowledge and agree to the following:

1. Our platform is only a conduit for accessing the Goodleap API services, and we do not control, endorse, or have any responsibility for the content, accuracy, or reliability of the Goodleap API services.
2. The use of the Goodleap API services is subject to the terms and conditions set forth by Goodleap. You are solely responsible for familiarizing yourself with and complying with these terms and conditions.
3. We do not make any representations or warranties regarding the accuracy, completeness, reliability, or availability of the Goodleap API services, and we will not be liable for any damages resulting from the use of or reliance on the Goodleap API services.
4. You are solely responsible for securing your Goodleap API account credentials and for any unauthorized use of your account.
5. We may discontinue or modify the integration with the Goodleap API at any time and for any reason, without prior notice.