

AUTO LENDING

Quick tips

1. Once your application status is 'Approved - Contracts Ready', you can complete the Required Actions to send contracts.
2. Introducers complete the 'Direct debit information' and 'Disbursement' confirmation.
3. Signing is completed via Docusign, with wet signature as an option for customers.

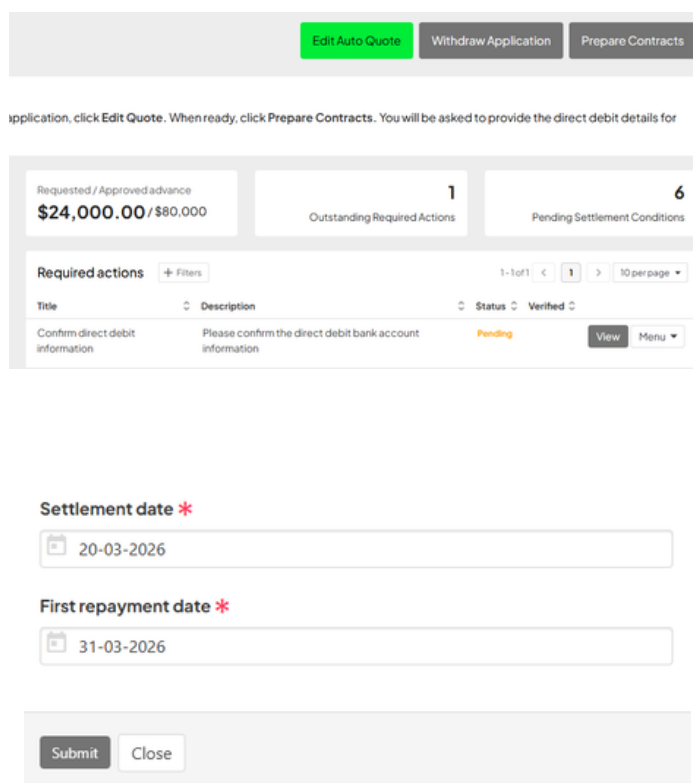
Direct debit information

- > Before you can issue the contracts, confirm the direct debit information. To do this, click on 'Prepare Contracts' at the top right-hand side of the portal.

Enter the name of the bank, the name of the account holder and the bank account number.

Check that these details are accurate, along with the settlement date and first repayment date and click 'Submit'.

That completes this action, and you can then move on to the 'Disbursement table'.



Name of bank *

Name of Account Holder *

Bank Account Number *

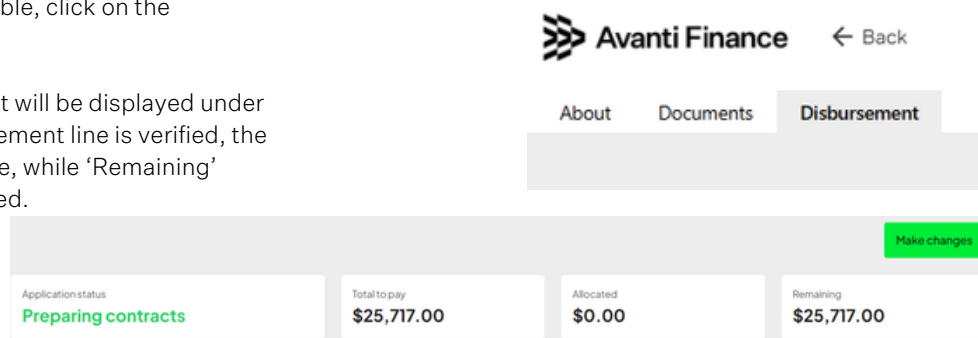
Settlement date *

First repayment date *

Disbursement table

- > To access the disbursement table, click on the 'Disbursement' tab.

The total disbursement amount will be displayed under 'Total to pay'. As each disbursement line is verified, the 'Allocated' amount will increase, while 'Remaining' decreases to \$0 once completed.



To make any changes to the deal, click 'Make changes' which will allow you to edit the auto quote and re-complete the process.

Disbursement table cont.

Disbursement + Filters								1-2 of 2	1	50 per page	+ Add
Disbursement Type	Payee	Amount	Bank Account No	Particulars	Code	Reference	Confirm Details				
Broker Fee	Test Broker	\$495.00	12 3209 0449072 00	00014648	[AccName]	[AccId]	✗				View
Commission	Test Broker	\$1,222.00	12 3209 0449072 00	00014648	[AccName]	[AccId]	✗				View

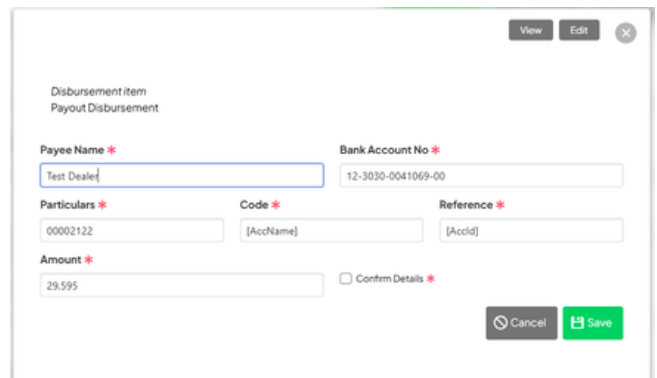
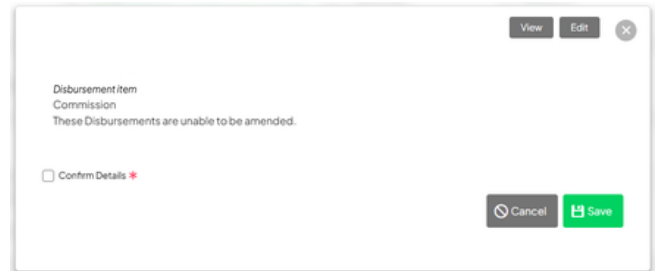
Disbursement + Filters								1-1 of 1	1	50 per page	+ Add
Disbursement Type	Payee Name	Amount	Bank Account No	Particulars	Code	Reference	Confirm Details				
Payout Disbursement	Test Broker	\$24,000.00	12 3209 0449072 00	00014648	[AccName]	[AccId]	✗				View

[Confirm disbursements](#)

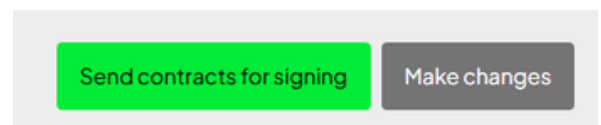
- > Click 'View' to review each disbursement line.

If you are a dealership that doesn't require funds to be paid to another account, click the 'Confirm disbursements' button at the bottom. This will process and confirm all disbursement lines.

If you are a broker, you can edit the 'Payee name' and 'Bank account number' fields for the payout disbursement, then click 'Confirm details' before saving.



- > Once all disbursement lines are complete, click 'Send contracts for signing'.



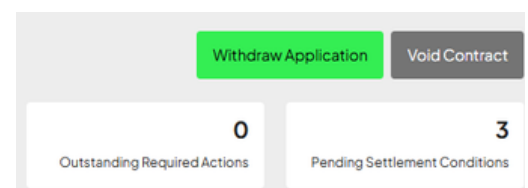
Generate contracts

- > Once you select 'Send contracts for signing', the application status will enter the 'Contract signing in progress' stage.

The contracts will first be sent to you for completion via DocuSign, before they are sent to the customer.

If the customer prefers to sign their contract using a wet signature, they can select 'Download' to print, sign and upload the contract directly to DocuSign. This ensures the contract and automated process will continue seamlessly.

Need to make changes? Click 'Void contract' to return to the 'Contract ready' stage. You can then make any updates required.



Need further support?

Contact our dedicated support team on **0800 003 111** or autosupport@avantifinance.co.nz. Alternatively, your local Relationship Manager can assist you.