User Guide
Contracts Ready

Avanti Finance

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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.

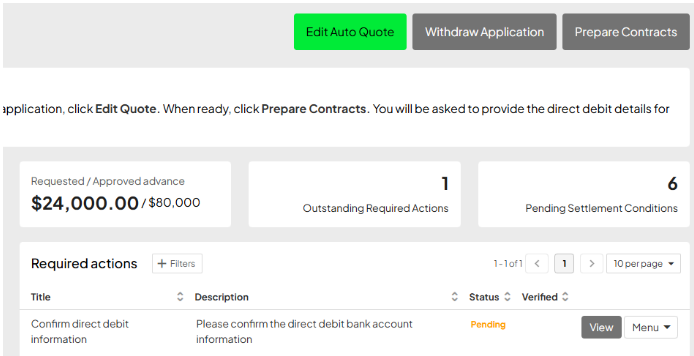
Direct debit information

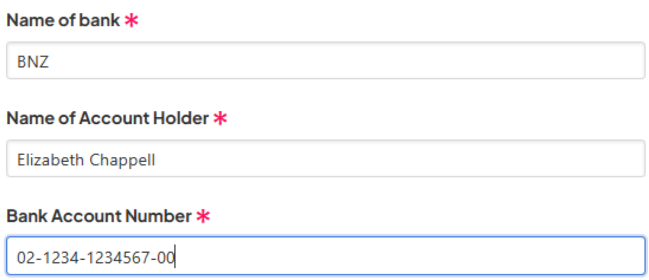
> Before you can issue the contracts, confirm the direct debit information. To do this, click on 'Prepare Contracts' at the top right-hand side of the portal.

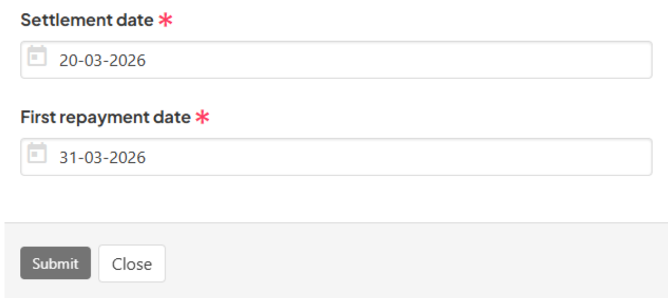
Enter the name of the bank, the name of the account holder and the bank account number.

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'.



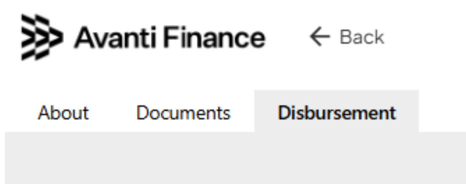


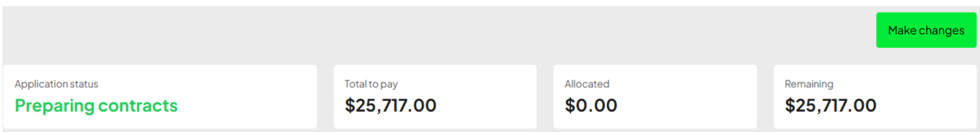


Disbursement table

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

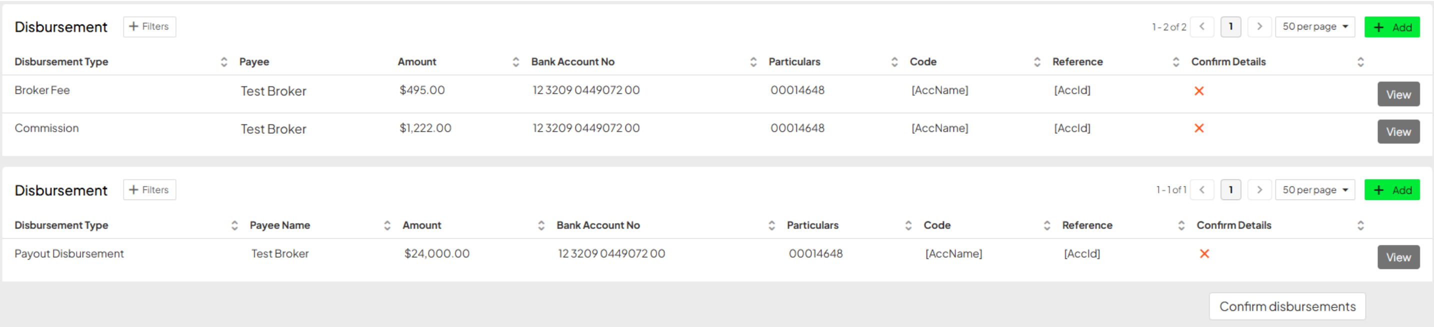
The total disbursement amount will be displayed under 'Total to pay'. As each disbursement line is verified, the 'Allocated' amount will increase, while 'Remaining' decreases to $0 once completed.





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 — 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 — 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.

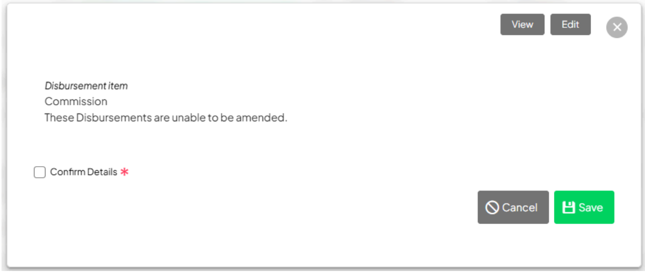
The disbursement section is broken into three sections:

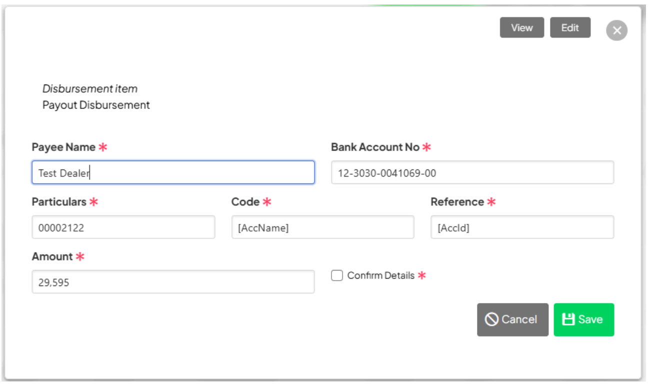
Fees and commission
Fees and commission disbursement records are system-generated. Please review and confirm each line item.

Payout remittance records
Payout and remittance disbursement records are system-generated. Please review and confirm each line item. If the payout needs to go to another party, please clear the relevant amounts and create manual disbursements.

Third party and manual records
If you have any additional third-party or manual disbursement records for this application, you can create them in this section.

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.





> Once all disbursement lines are complete, click ‘Send contracts for signing’.

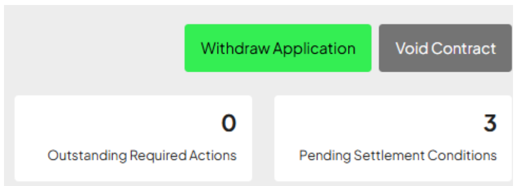
Generate contracts

> 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.