User Guide

Submitting an Application – Commercial

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AUTO LENDING

Quick tips

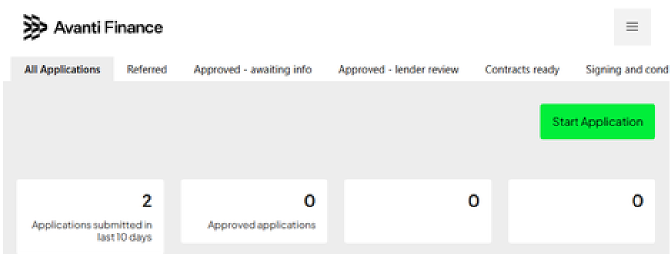
1. Start your application via the Avanti Partner Portal.
2. You can generate a quote before completing the application, with the option to email a PDF quote.
3. Liabilities are automatically populated from the applicant's credit file, making it easier for you to complete this section.
4. After submitting, you can easily send the customer a bank statement request or upload Brokerflow ID.

Starting an application

> To start an application in the Avanti Partner Portal, click the 'Start application' button on the right-hand side of the screen.

Read and tick to confirm that you remain compliant with your obligations under the Avanti Finance Introducer Agreement and have completed all required training.

You can either choose to be redirected or open in a new window to access the full application form.



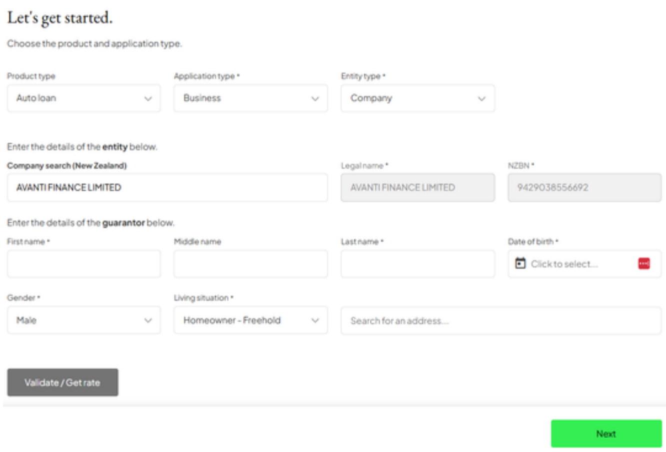
Completing the application

> Once you've selected the product and application type, complete the entity details using the company search function.

As you start to enter the company name, you will be presented with a list of company names to choose from.

Next, complete the guarantor information.

Validate/Get rate: Clicking this button will verify the customer's information and generate a quote. You can then review the applicant's interest rate and adjust the terms in the repayment calculator.

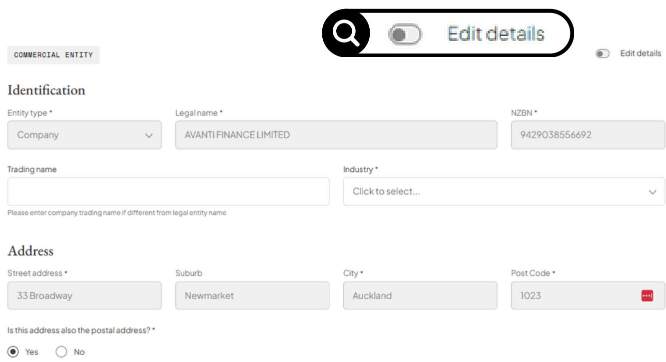


Applicant information

> **Identification and editing details**

Any applicant information that you have completed in the 'Let's get started' section will be pre-populated. Need to edit the details? Toggle the 'Edit details' button at the top right of the screen.

Then, provide financial information and a contact person's mobile number and email address (this can be someone other than a director or guarantor).

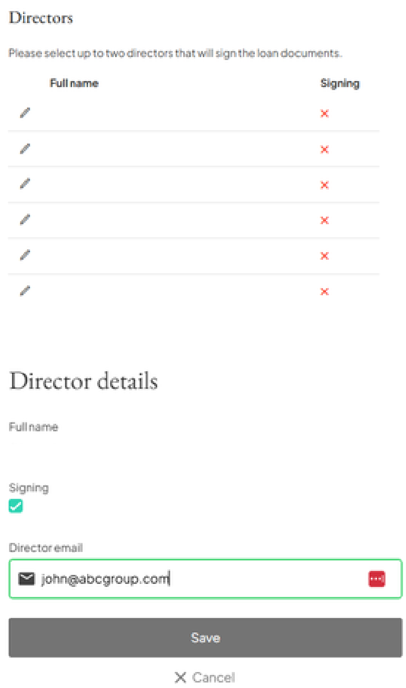


Applicant information cont.

> **Directors**
Company directors will be displayed based on information from the Companies Office. To assign which director will sign the application, click the edit pencil icon.

A pop-up will display. Tick 'Signing' and then enter the director's email address. Once saved, you will see a green tick next to their name.

You are only required to select one director to sign the application.

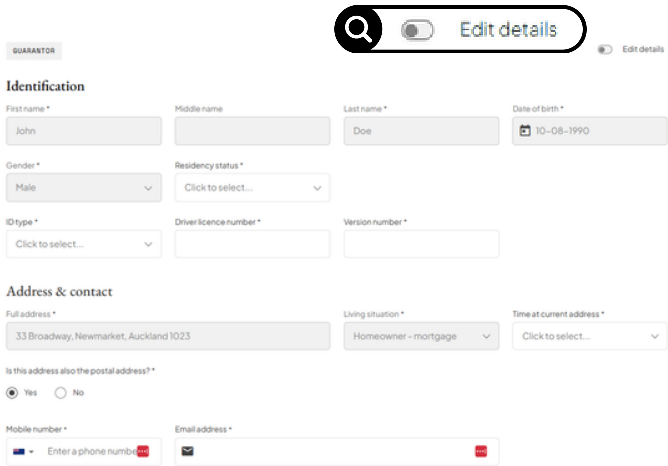


Guarantor

> **Identification and editing details**
The guarantor information that you completed in the previous section will be pre-populated. Need to edit the details? Toggle the 'Edit details' button at the top right of the screen.

Once you've completed this page, you can click 'Submit'. This will submit your application for assessment.

Click 'Verify the ID' before continuing, to confirm that the ID is valid and meets our criteria.



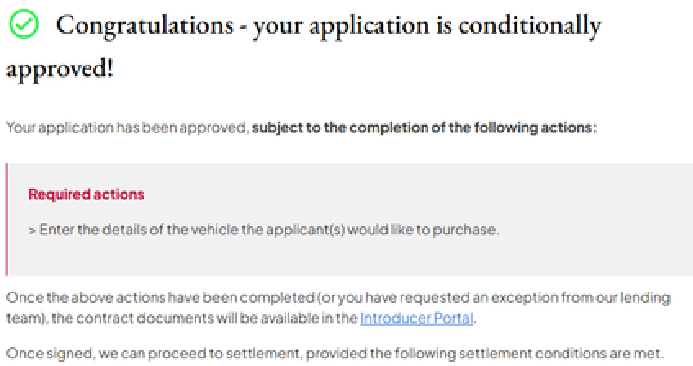
Submission

> **Required actions**
Once submitted, your application will be processed. You will receive one of the following outcomes on screen: Declined, Approved, or Referred.

You can then immediately view and complete any required actions in the 'About' tab in the portal.

> **Bank statements and documents**
On the same page, you can send your customer a secure link to complete their statements or enter a Brokerflow ID if you already have one.

If any action requires document uploads, you can upload them directly on this page.



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.