

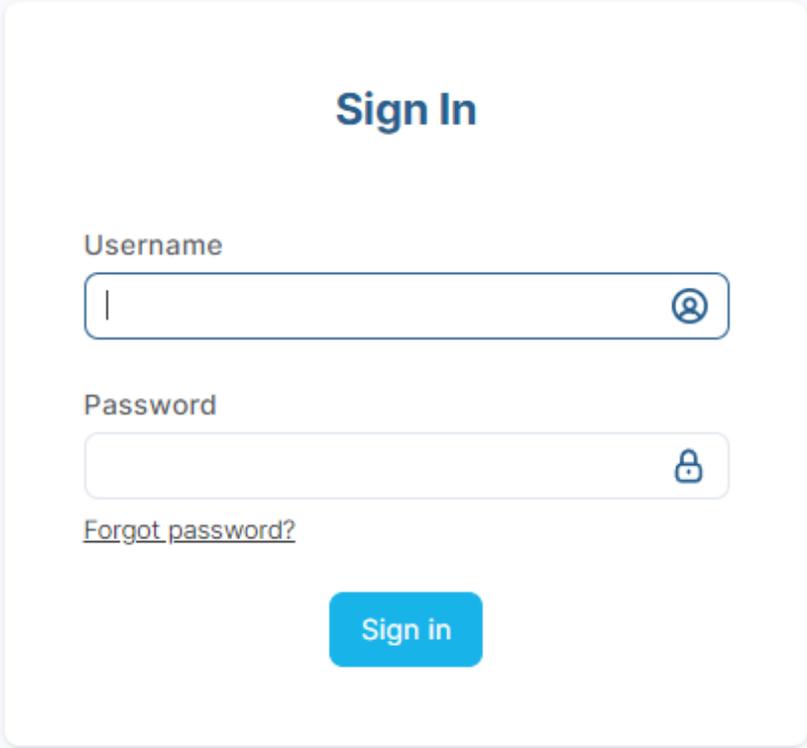
***Using our system***  
*A step-by-step guide*



# Logging in

To log in, you'll need your username and password provided to you by our team.

Please note: if you've forgotten your password, click on "Forgot password?" to reset it. If you require further assistance, please contact our team on 0800 003 111.



The image shows a 'Sign In' form with the following elements:

- Sign In**: A blue heading centered at the top of the form.
- Username**: A label above a text input field. The input field contains a vertical bar cursor and has a user icon on the right side.
- Password**: A label above a text input field. The input field has a lock icon on the right side.
- Forgot password?**: A link below the password field.
- Sign in**: A blue button centered below the form fields.

# Application views

## APPLICATION STAGE VIEW

Once you've logged in, you'll see a grid view of all your applications and the stage they're at.

Stages			
Stage Name	Action required	Managed by me	All
Data Capture	1	-	27
Customer Completing	-	-	60
Lender Assessment	-	-	22
Conditionally Approved	-	-	2
Approved	-	3	30
Contracts Ready	-	-	5
Contracts Completed	-	-	1
Contracts Unwanted	-	-	6
Verification Review	-	-	4
Settlement On Hold	-	-	3
Compliance Review	-	-	1
Settlement Exception	-	-	3
Settled	-	2	11
Declined	-	2	13
Not Proceeding	-	22	492

## NAVIGATION

You can search for applications by customer name or case ID by selecting the option in the drop-down. Or you can simply click through the numbers of the stages to browse. Your search will show the stages for any results and display some key details in the table below the search.

Note: If searching by case ID, you can use just the first four characters of the reference.

**Search**

Case Id

9DS1

Search

Stages				Results for: Case Id is '9DS1'
Stage Name	Action required	Managed by me	All	
Conditionally Approved	-	-	1	

Conditionally Approved			
Assigned To	Case Id	Name	Last Progression
Operator	9DS13B09LVOJRIMF	John Citizen	2 minutes ago

# Application views

When you select an application from the list you'll see more details about the application and actions available to you at that stage.

→ Case Actions

View Questions

Edit Application

Change broker

○ Status

Stage	Conditionally Approved
Form	

📄 Details

Case Id	M6J51F0IJJKALZ8
Started	May 20, 2024 10:32:41 AM (2 months ago)
Last Modified	Aug 08, 2024 09:42:32 AM (1 day ago)
Entity / Brand	dacmeakl / financecentral
Assigned To	Operator

👤 Customers & Related Users Show more users:

**Customers**

Name:	may twenty (Primary)
Relationship:	Applicant1
Identifier:	adarsh.ramasubramanian@avantifinance.co.nz
Mobile:	0220146641
Email:	adarsh.ramasubramanian@avantifinance.co.nz

🔍 Case Summary

**Loan Details**

Loan 1	
Loan Value	\$11,720.10
Product	FinanceCentral Auto
Promotion	Finance Central Tier1 140224
Term	5 Years
Interest Rate	15.25%
Settlement Date	20-8-2024
Loan Purposes	PersonalVehicle

**Security Details**

Item	Description
Vehicle New/Used	-
Vehicle Type	Car
Rego/Vin	-
Make	-
Model	-
Vehicle Submodel	-
Year	-
Transmission	-
Engine Capacity	-

# Application views

## NAVIGATION

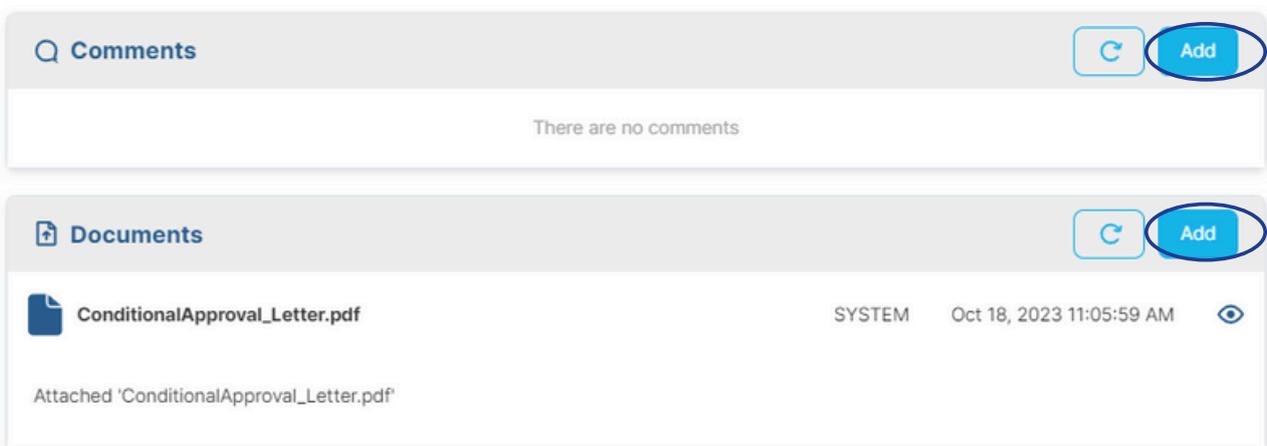
The stage refers to the status of the application and shows you what point in the process an application is at right up until settlement.

Action required means that the application is currently assigned to you and there are actions required for you to complete.

## COMMENTS AND DOCUMENTS

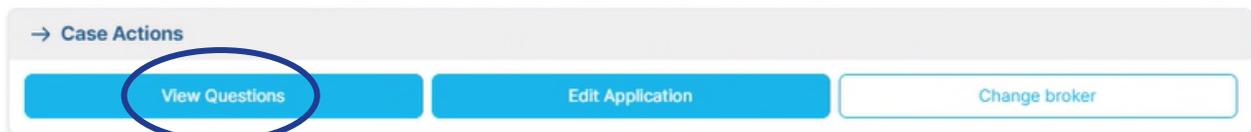
Below the loan details section, you'll see the comments and documents section. Here you'll be able to see all relevant documents and the comments between yourself and our team.

You can add a comment or document at any time by simply clicking 'Add'.



## VIEW QUESTIONS

Clicking on the 'View Questions' button will open the full application in a read only view where you'll be able to view all the details of the application.



# Application process

## DATA CAPTURE

Applications that have not been submitted will be located in the 'Data Capture' stage.

Stage Name	Action required	Managed by me	All
Data Capture	17	1	1

## PROCESSING APPLICATION

When you submit an application, it will sit in processing application for about 60 seconds while our system determines the outcome.

Processing Application	-	1	-
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## LENDER ASSESSMENT

Applications in this stage correlate to a 'refer' decision and means that the application is now with our lending team for a manual assessment of the application.

Lender Assessment	1	7	-
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## CONDITIONALLY APPROVED

Applications that have either been auto-conditionally approved, or manually approved by a lender can be found in this stage. Applications that do not have vehicle details or require a Private Sale agreement will need to be added to allow the application to move through this stage.

Conditionally Approved	2	3	-
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→ Case Actions

[View Questions](#) [Edit Application](#) [Change broker](#)

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**Status**

Stage	Conditionally Approved
Form	

**Details**

Case Id	M6J51F0IJJKALZ8
Started	May 20, 2024 10:32:41 AM (2 months ago)
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**Customers & Related Users** Show more users:

**Customers**

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Relationship:	Applicant1
Identifier:	adarsh.ramasubramanian@avantifinance.co.nz
Mobile:	0220146641
Email:	adarsh.ramasubramanian@avantifinance.co.nz

# Application process

## CONTRACTS SENT

Once the loan contract documents have been sent, the application will move to the 'Contracts Sent' stage.

Contracts Sent	1	-	-
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If the contracts were sent via eSign, the application will automatically move to the next stage once the process has been completed. If the documents are being signed manually, you'll need to upload the completed documents, then select 'Contracts Completed' in the system to move the application to the next stage.



## CONTRACTS COMPLETED

When the contract has been completed, the application will move to the 'Contracts Completed' stage. You'll have an opportunity at this stage to add any missing documents or information required for settlement as outlined in the loan contract conditions. Once everything required is provided, you can select 'Submit to Settlement' to send the application to our settlements team for review and payout.



## NOT PROCEEDING

Applications that have been withdrawn can be found in the 'Not Proceeding' stage.

Not Proceeding	-	16	-
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## WITHDRAWING AN APPLICATION

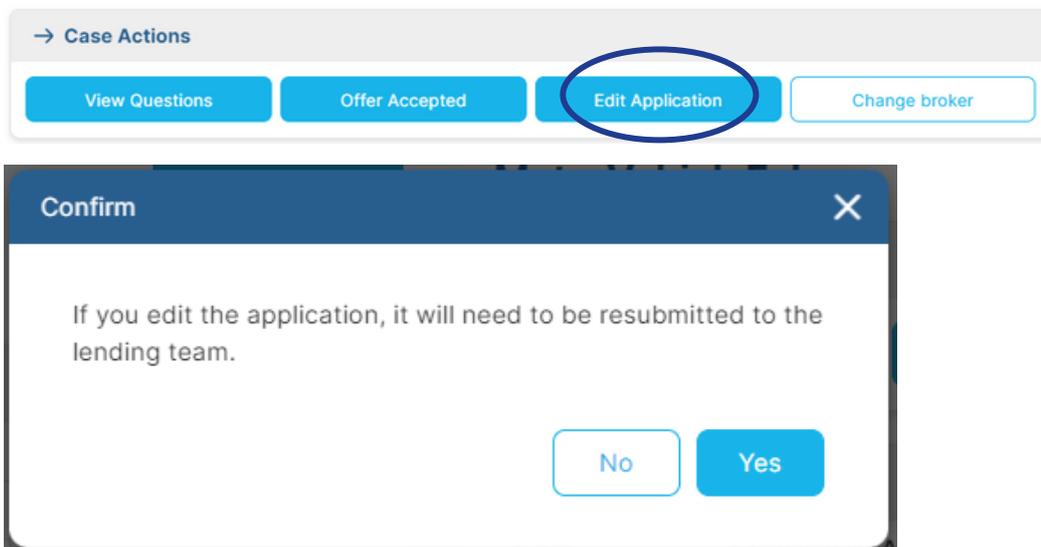
At certain stages, you'll see a 'Not Proceeding' button you can select to withdraw the application.



# Editing an application

## REQUESTING CHANGES TO AN APPLICATION

When applications are in the 'Conditionally Approved' stage, you can edit it if you receive any new or updated information.

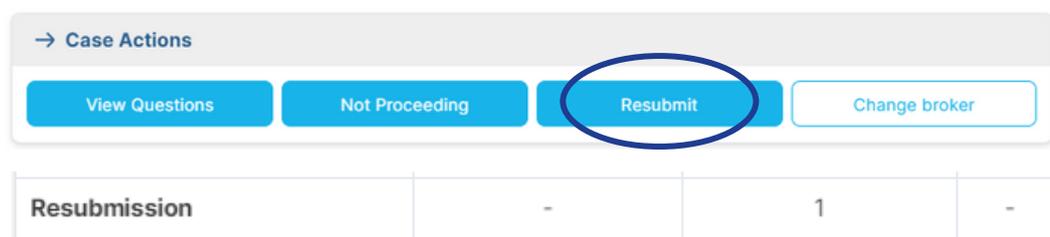


Doing this will open the application in an edit mode and move the application to the 'Changes Requested' stage. From here you can edit anything in the application, such as vehicle and applicant details.

Once you've made your changes, be sure to save them before clicking the back button on the top left hand corner.



When the application is ready to be assessed again, you'll need to resubmit it. This option will appear in the Case actions box. Edited applications that have been resubmitted will go to a stage called 'Resubmission'.



Note: If you don't select the resubmit button after editing, our team will not be able to assess the application and you'll be sent a reminder email.

# Editing an application

## WHEN A LENDER HAS REQUESTED CHANGES TO AN APPLICATION

If a lender requires some changes to be made, they can send the application back to you. You'll receive an email advising there is an action required.

You'll also be able to find the application in the 'Changes Requested' stage, with the 'Action Required' column showing the number of changes needed.

Stage Name	Action required	Managed by me	All
Changes Requested	1	-	-

You can review the comments from the lender from the comments section on the main screen.



You'll be able to edit and resubmit the application the same way as explained on the previous page.



[avantifinance.co.nz](http://avantifinance.co.nz)  
[brandedfinancial.co.nz](http://brandedfinancial.co.nz)



[dealerteam@avantifinance.co.nz](mailto:dealerteam@avantifinance.co.nz)



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