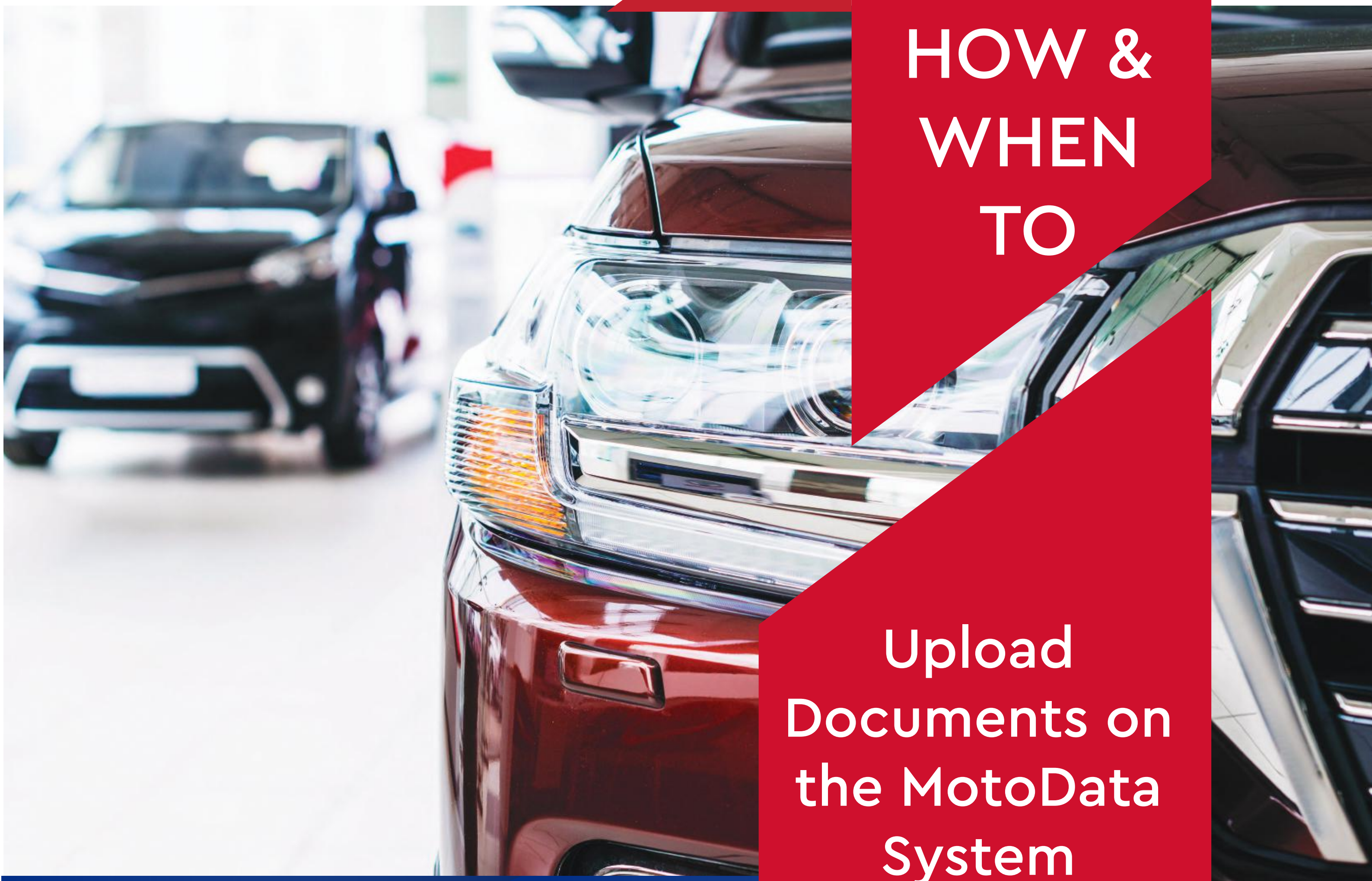


HOW & WHEN TO

Upload Documents on the MotoData System

MotoData

CONNECT • ENABLE • EMPOWER

BUTTONS USED IN THE UPLOADING & VIEWING OF DOCUMENTS

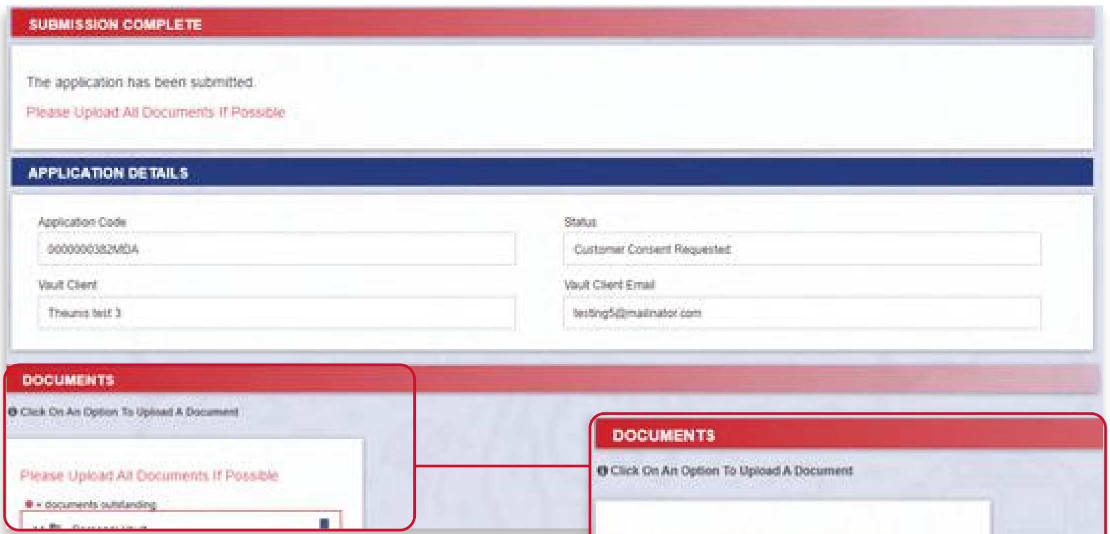
There are several buttons used to navigate documents within the system:

- Upload a document
- Reupload/Resubmit a document
- Download a document that was previously uploaded or system generated
- View the history of the document
- View a document without downloading it

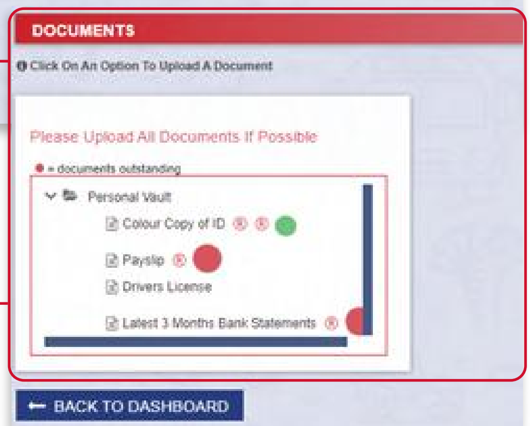
STEP 1

AFTER SUBMITTING A NEW APPLICATION

After submitting a new application, you will be directed to the following screen:



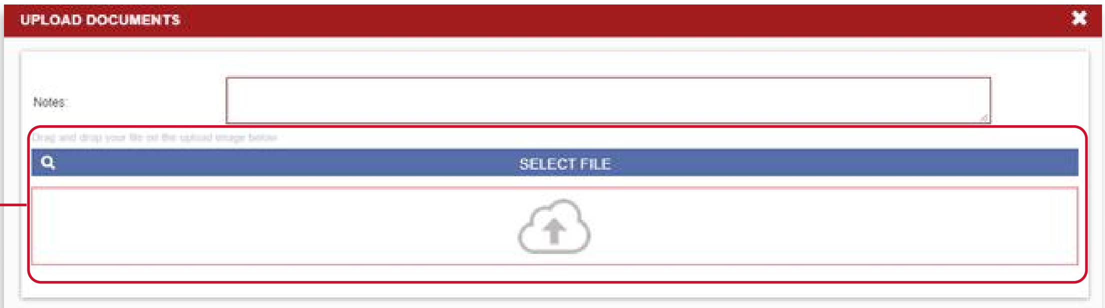
Scroll down to the 'DOCUMENTS' section to upload the required documents.



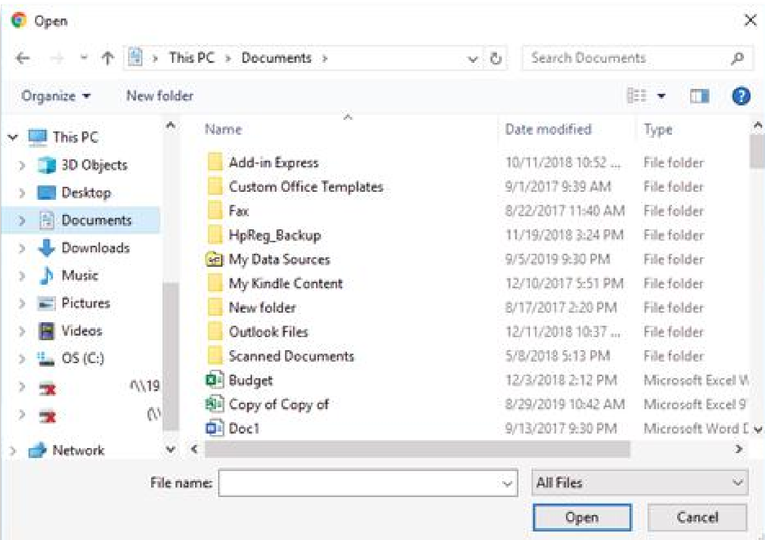
Click on the option of the document type you would like to upload, for example 'Payslip'. A button will appear to the right, which will enable you to browse for the required document on your local PC/Laptop.

In this example, click on 'UPLOAD PAYSLIP'.

Next, click 'SELECT FILE':



Select the document you would like to submit and wait for it to be uploaded onto the system.



Once the document has been uploaded, the following message will appear:

Should you need to upload a second document, select the upload button.

An arrow will appear indicating that multiple documents were uploaded for this field.

Click on the arrow to view all the available documents.

STEP 2

THE OUTSTANDING TASKS SECTION

Click the 'Action' button to access a deal.

There are two options available for uploading documents:

1. In the 'APPLICATION DOCUMENTS' section
2. In the 'CLIENT DETAIL' section

Option 1: Upload any type of document in the Application Documents section:

Select the 'UPLOAD ADDITIONAL DOCUMENTS' button which will enable you to browse for and upload the required document(s). See the process described under section 1 above.

Option 2: Alternatively, you can upload standard required deal documents within the 'CLIENT DETAIL' section:

To do so, click on the option of the document type you would like to upload. The option will expand with two further options below it:

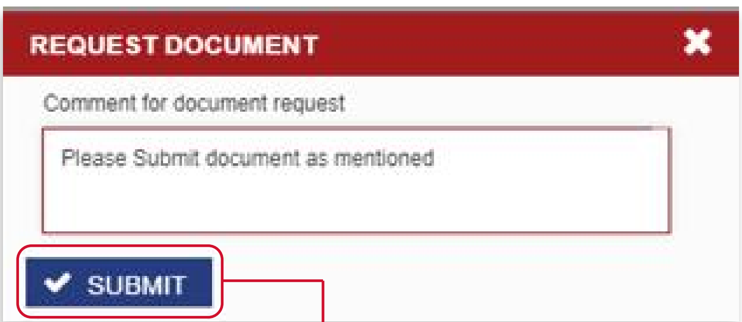
1. Request the document from the user
2. Upload the document

To upload the document:

See the process described under section 1 above.

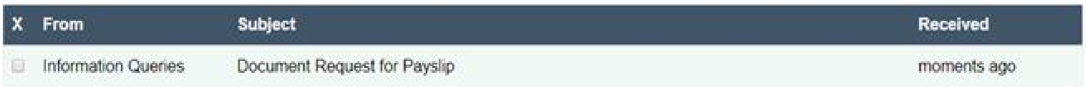
To request the document from the user:

Select the 'REQUEST COLOUR COPY OF ID FROM USER' button. The following screen will open:

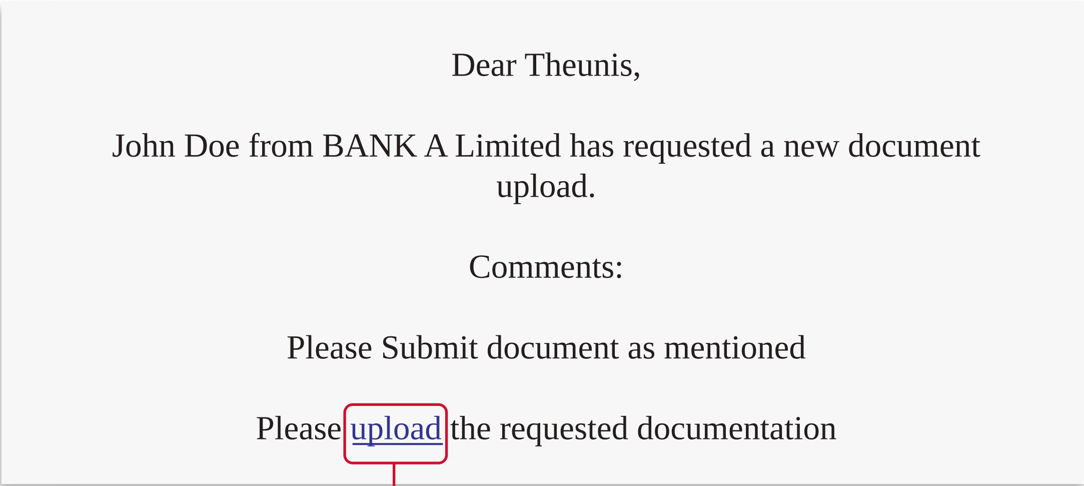


Enter a message and select 'SUBMIT'. This will generate an e-mail and an SMS to the customer requesting the document to be uploaded.

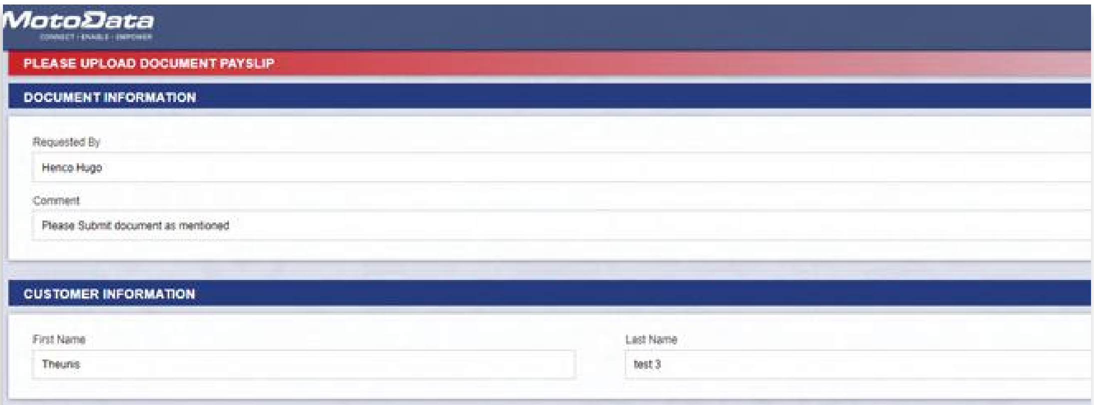
Example of the e-mail message:



The customer will have the options to either upload the document via email or submit a photo of the document taken with their phone.



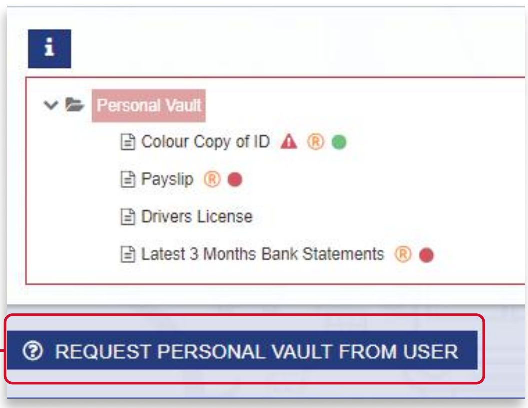
To do so, select the 'Upload' link which will direct users to the following screen. This screen can also be accessed via the SMS sent to the customer.



As soon as the customer submits the document, it will automatically be available on the MotoData system and linked to the relevant deal.

To request multiple documents from the user:

Click on 'REQUEST PERSONAL VAULT FROM USER' to request all the documents required for the deal at once.



Example of the message sent to the customer:

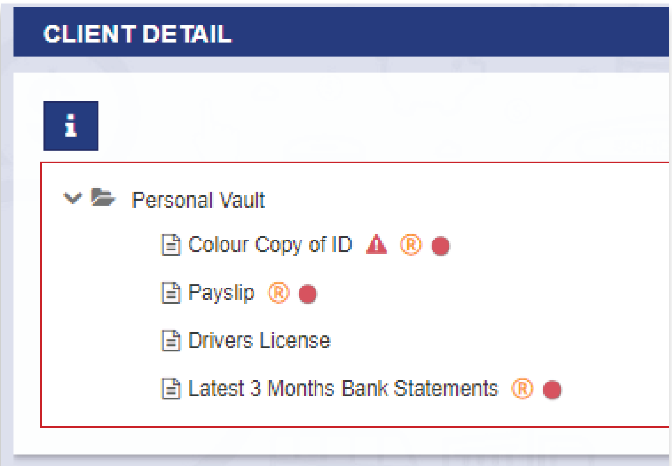
STEP 3

THE APPLICATION HISTORY SECTION

Should a deal be unavailable in the 'OUTSTANDING TASKS' section, you will still be able to access the deal in the Application History section and upload documents from there.

Access the 'APPLICATIONS' section and then click the 'Action' button to access a deal.

The deal page will open where you will be able to upload standard deal documents:



Follow the steps described above by clicking on the option of the document type you would like to upload.

STEP 4

REQUESTING THE BANK TO CONTRACT

Once the deal has been validated and the customer is ready to contract, request the bank to contract by following these steps:

Upload Your Invoice

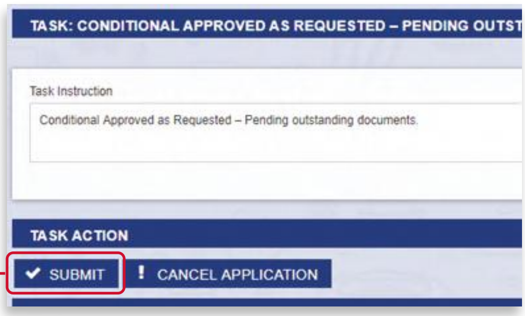
Access the deal under the 'OUTSTANDING TASKS' section. Should the deal not be available in the OUTSTANDING TASKS' section, request the bank submit the deal back to the dealer. Alternatively, restore a cancelled or declined deal from the 'APPLICATION HISTORY' section. This will resubmit the deal to the bank. You will need to wait for their reply before continuing.

After you have received the first approval from the bank, the 'Upload Invoice' functionality will be made available in the 'APPLICATION DOCUMENTS' section.

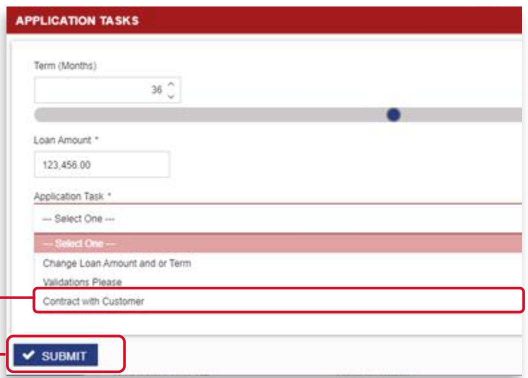
NOTE: Make sure to upload the invoice before submitting to the bank, to avoid the request being blocked by the system.

Submit the Deal for Contracting

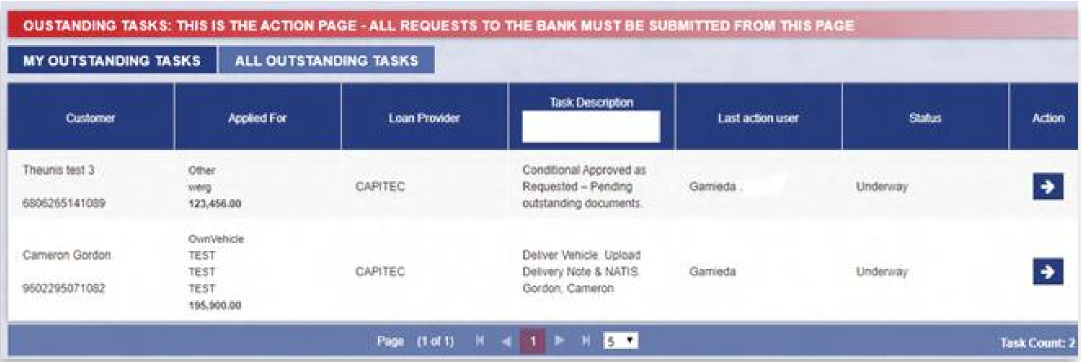
Under the 'TASK ACTIONS' section, submit the deal by clicking on 'SUBMIT':



Next, select the 'Contract with Customer' task from the dropdown options and then click 'SUBMIT'.



Once the bank has contracted with the customer, a task will appear in the 'OUTSTANDING TASKS' section.



OUSTANDING TASKS: THIS IS THE ACTION PAGE - ALL REQUESTS TO THE BANK MUST BE SUBMITTED FROM THIS PAGE

MY OUTSTANDING TASKS | ALL OUTSTANDING TASKS

Customer	Applied For	Loan Provider	Task Description	Last action user	Status	Action
Theunis test 3 6806265141089	Other werg 123,456.00	CAPITEC	Conditional Approved as Requested – Pending outstanding documents.	Gamieda	Underway	
Cameron Gordon 9602295071082	OwnVehicle TEST TEST TEST 195,900.00	CAPITEC	Deliver Vehicle. Upload Delivery Note & NATIS. Gordon, Cameron	Gamieda	Underway	

Page (1 of 1) 1 5 Task Count: 2

The tasks description will state that the vehicle needs to be delivered and the signed delivery note and a copy of the NATIS Document uploaded to initiate payment.

See the process described under section 5 below.

STEP 5

REQUESTING A PAY-OUT

Open the deal to access all the application documents:

Download the MotoData delivery note and print it. Have the customer sign the delivery note once they are satisfied with the goods received.

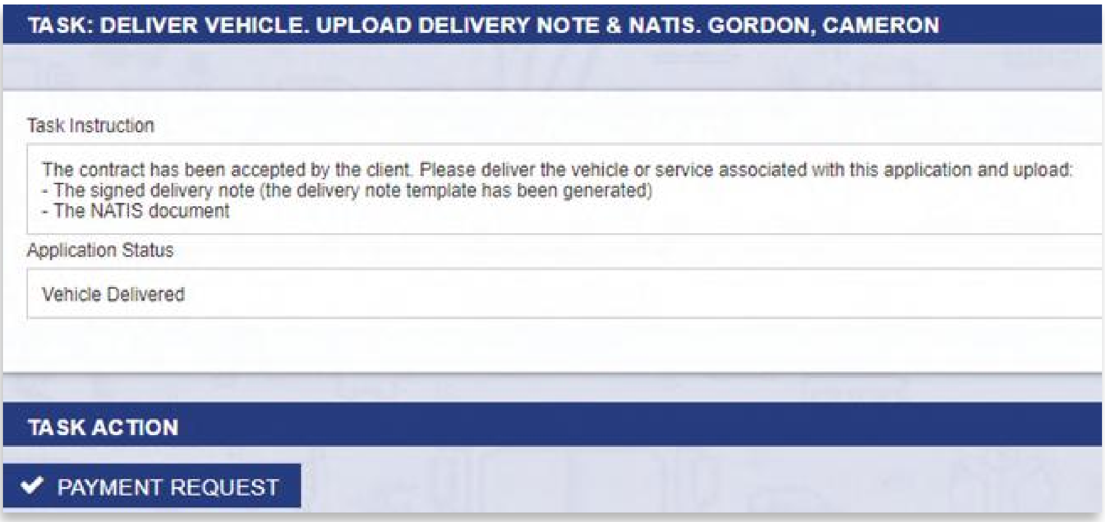
APPLICATION DOCUMENTS

Type	Uploaded by	Uploaded	File Name	Version	Required	Actions
Additional Document	Gamieda	21 Aug 2019 (13:24)	Motodata_Deal_Confirmation.pdf	1		
Additional Document	Gamieda	21 Aug 2019 (13:24)	MotodataDeliveryNote.pdf	1		
Additional Document	Gamieda	21 Aug 2019 (13:24)	Motodata_Dealer_Remittance.pdf	1		
Delivery Note		Awaiting Submission				
NATIS		Awaiting Submission				

Upload the **signed** delivery note and a copy of the NATIS Document (registered in the customer's name).

Next, access the 'TASK ACTION' section and select 'PAYMENT REQUEST' to receive payment for the deal.

NOTE: Make sure to upload the required documents to avoid the payment request being blocked by the system.



You will receive an e-mail once payment has been made. The deal documents and proof of payment can be accessed via the 'APPLICATION HISTORY' section.