








HOW &  
WHEN  
TO

Upload  
Documents on  
the MotoData  
System

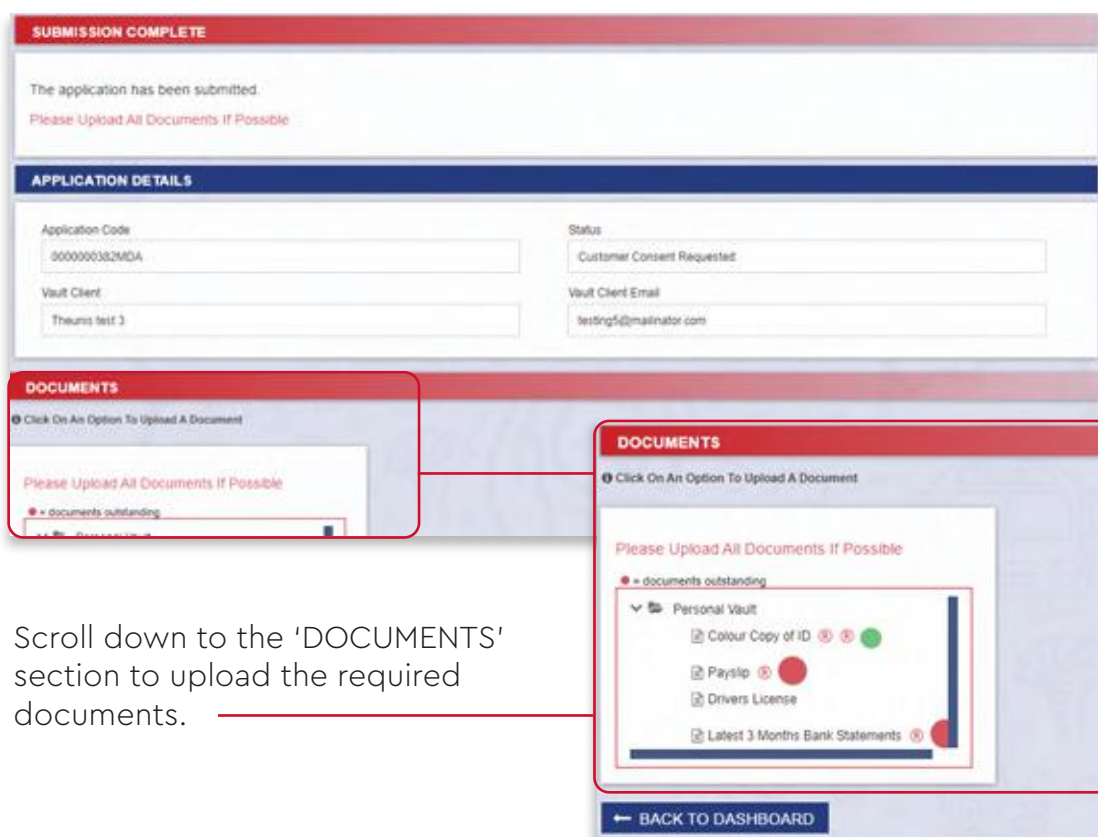
## BUTTONS USED IN THE UPLOADING & VIEWING OF DOCUMENTS

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:

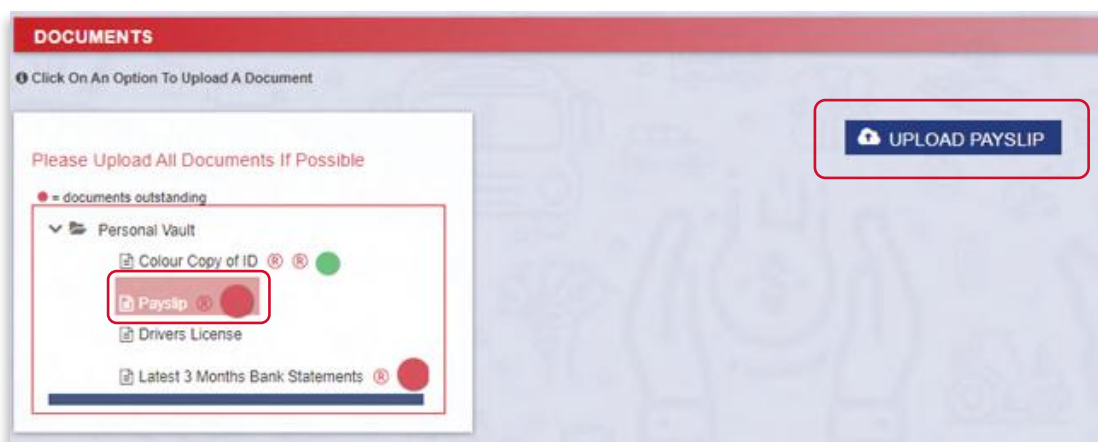


The screenshot shows a web interface with a red header bar. Below the header, a message states 'The application has been submitted. Please Upload All Documents If Possible'. The 'APPLICATION DETAILS' section contains fields for Application Code (0000000382MDA), Status (Customer Consent Requested), Vault Client (Theunis test 3), and Vault Client Email (test5ng5@mailinator.com). The 'DOCUMENTS' section is highlighted with a red box and a callout. The callout shows a list of document types: Personal Vault, Colour Copy of ID, Payslip, Drivers License, and Latest 3 Months Bank Statements. Each item has a status indicator (a circle with a red or green dot). A 'BACK TO DASHBOARD' button is visible at the bottom.

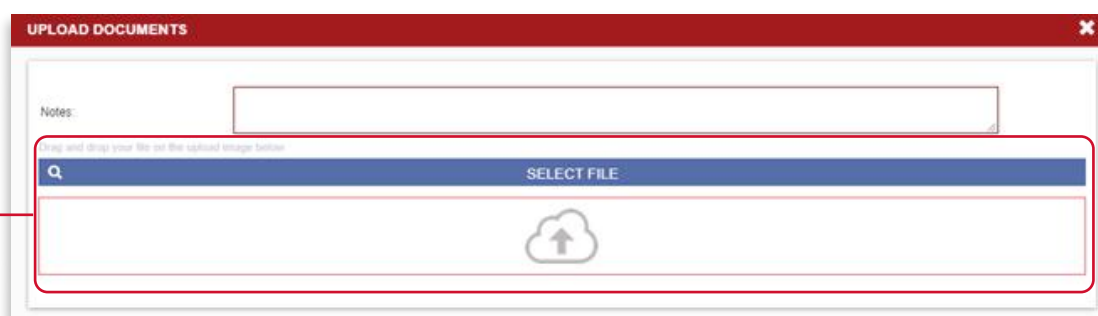
Scroll down to the 'DOCUMENTS' section to upload the required documents.

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.

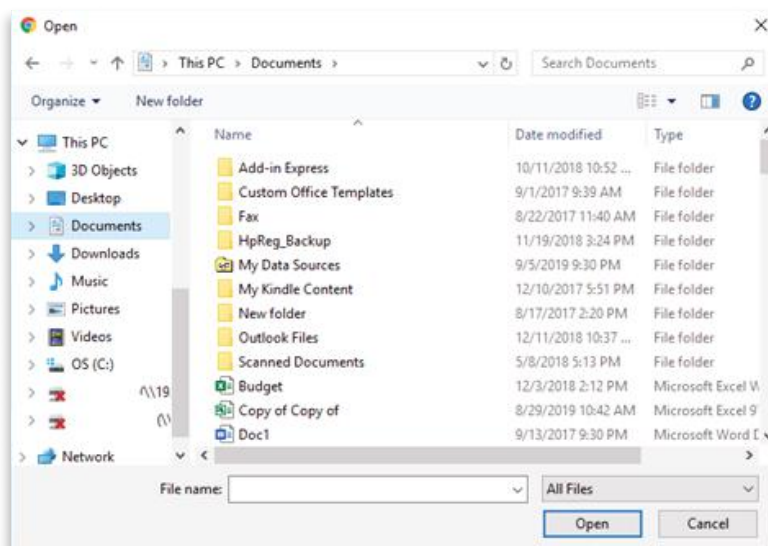
In this example, click on 'UPLOAD PAYSLIP'.



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.



DOCUMENTS					
	Version	Owner	Date Added	Original File Name	Actions
	2	Theunis test 3	12 September 2019 (11:07:49)	New rent.xlsx	  

Click on the arrow to view all the available documents.



Please Upload All Available Documents To Get The Best Deal Structured Fast

Click On An Option To Upload A Document

- documents outstanding
  - Personal Vault
    - Colour Copy of ID
    - Payslips
    - Drivers License
    - Latest 3 Months Bank Statements

DOCUMENTS					
	Version	Owner	Date Added	Original File Name	Actions
	2	Theunis test 3	12 September 2019 (11:07:49)	New rent.xlsx	  
	Version	Owner	Date Added	Original File Name	Actions
	1	Theunis test 3	12 September 2019 (10:47:57)	Blue van.xlsx	

## 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:

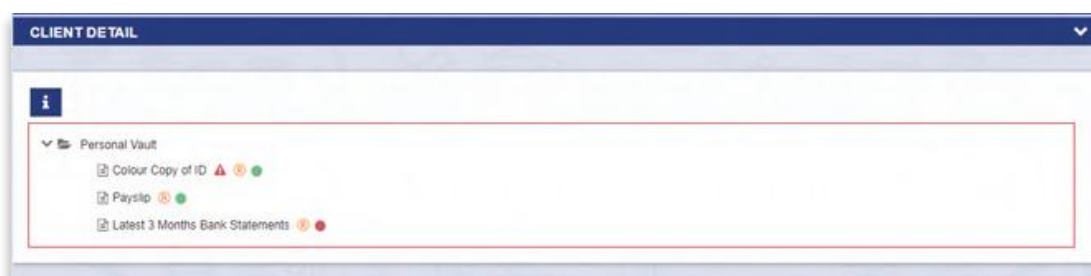


APPLICATION DOCUMENTS						
 <b>UPLOAD ADDITIONAL DOCUMENT</b>						
Type	Uploaded by	Uploaded	File Name	Version	Required	Actions

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

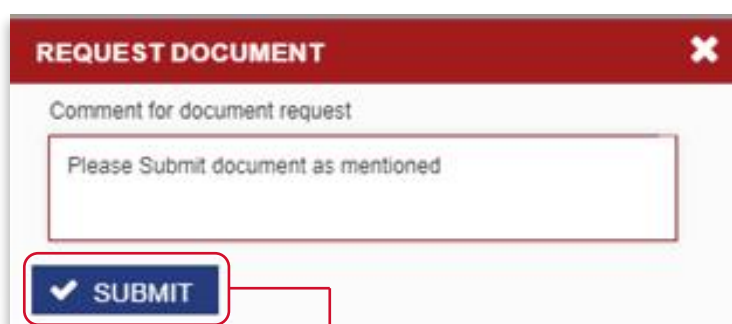


*To upload the document:*

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:

X	From	Subject	Received
<input type="checkbox"/>	Information Queries	Document Request for Payslip	moments ago

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

Dear Theunis,

John Doe from BANK A Limited has requested a new document upload.

Comments:

Please Submit document as mentioned

Please [upload](#) the requested documentation

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.

**MotoData**  
CONNECT • ENABLE • EMPOWER

**PLEASE UPLOAD DOCUMENT PAYSIP**

**DOCUMENT INFORMATION**

Requested By  
Hence Hugo

Comment  
Please Submit document as mentioned

**CUSTOMER INFORMATION**

First Name  
Theunis

Last Name  
test 3

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.

**Personal Vault**

- Colour Copy of ID ▲ R ●
- Payslip R ●
- Drivers License
- Latest 3 Months Bank Statements R ●

**REQUEST PERSONAL VAULT FROM USER**

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.

APPLICATION DOCUMENTS						
UPLOAD ADDITIONAL DOCUMENT						
Type	Uploaded by	Uploaded	File Name	Version	Required	Actions
Invoice		Awaiting Submission				

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.

APPLICATION DOCUMENTS						
UPLOAD ADDITIONAL DOCUMENT						
Type	Uploaded by	Uploaded	File Name	Version	Required	Actions
Invoice	Henco	Uploaded Awaiting Submission	Drivers front.jpg	1		

## Submit the Deal for Contracting

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

**TASK: CONDITIONAL APPROVED AS REQUESTED – PENDING OUTSTANDING DOCUMENTS**

**Task Instruction**  
 Conditional Approved as Requested – Pending outstanding documents.

**TASK ACTION**  

**SUBMIT**
**CANCEL APPLICATION**

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

**APPLICATION TASKS**

Term (Months)  
 36

Loan Amount \*  
 123,456.00

Application Task \*  
 --- Select One ---  
 --- Select One ---  
 Change Loan Amount and/or Term  
 Validations Please  
 Contract with Customer

**SUBMIT**



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

OUTSTANDING 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 verg 123,456.00	CAPITEC	Conditional Approved as Requested - Pending outstanding documents.	Garnieda	Underway	
Cameron Gordon 9602295071082	OwnVehicle TEST TEST 195,900.00	CAPITEC	Deliver Vehicle: Upload Delivery Note & NATIS Gordon, Cameron	Garnieda	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	Garnieda	21 Aug 2019 (13:24)	Motodata_Deal_Confirmation.pdf	1		
Additional Document	Garnieda	21 Aug 2019 (13:24)	MotodataDeliveryNote.pdf	1		
Additional Document	Garnieda	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.

TASK: DELIVER VEHICLE. UPLOAD DELIVERY NOTE & NATIS. GORDON, CAMERON	
Task Instruction	
The contract has been accepted by the client. Please deliver the vehicle or service associated with this application and upload: - The signed delivery note (the delivery note template has been generated) - The NATIS document	
Application Status	
Vehicle Delivered	
TASK ACTION	
✓	PAYMENT REQUEST

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.