



Generating eSign documents in Asset Backer

How-to guide

Payouts by eSign is proving to be extremely beneficial to our brokers and their customers. If you're looking to speed up your processes, generate deals faster, and serve your clients more efficiently, eSign through Asset Backer is your go-to.

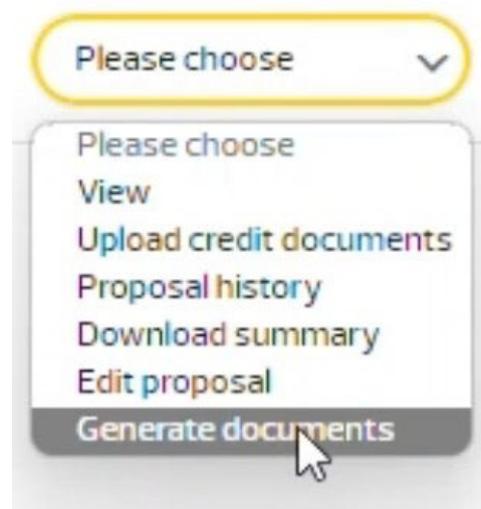
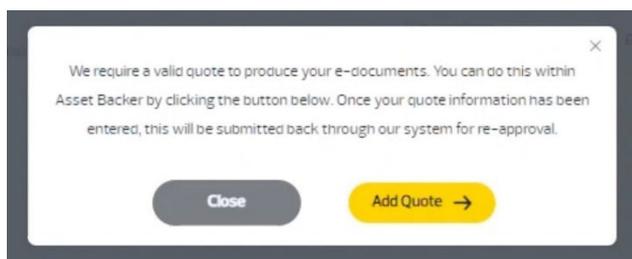
In this guide, we'll show you the two ways that you can generate a document for eSign.

Generate a document for eSign via Track Proposals

In order to generate a document, the proposal needs to be in one of three statuses: **Accepted**, **KYC Complete**, or **Document Incomplete**.

You can only generate a document for proposals that have a quote attached to them. If the proposal doesn't have a quote, you'll just need to add one first. To do so, click **Generate documents** and you'll be prompted to **Add Quote**. Click here, review the approved information in the quote, validate it's still correct, and resubmit by following the pages through until you reach **Resubmit**.

If nothing has changed, your proposal will automatically re-approve and Asset Backer will update the latest status within five minutes. You can then select the **Generate documents** option from the drop-down menu, and this time you'll be taken through to the document generation journey. The next pages will guide you through the eSign process.



Generate a document for eSign via email

For every approved proposal, you'll receive an automated email from Asset Backer to say that your documents are now ready to be generated. Just click on the link and you'll be taken directly to the document generation page, bypassing the manual steps in the first method. This is a much quicker route.

Aldermore

Asset Backer
Your portal to
Aldermore asset finance

B095612

Good news – your documents are ready to be generated!
As your proposal is now approved, you can generate your e-documents using Asset Backer.
We've made the process simple and straightforward.
Just **click on the link below** and enter your log-in details and you'll be taken to the 'Document landing page'.

Generate documents

When you're on the document generation page, select the relevant documents for the deal. Mandatory documents are conditional based on the approved proposal product type e.g. if we've approved a Hire Purchase, we'll only present Hire Purchase agreements to you. Any optional documents should be selected based on the credit conditions or additional requirements. Click '**Confirm**' and proceed by clicking the **eSign** button.

Optional documents

- Acceptance Certificate
- Business Use Statement
- Corporate Guarantee - Agreement Specific (At credit's request)
- Corporate Guarantee - Blanket (At credit's request)
- Cross Company Guarantee - Blanket (At credit's request)
- Director Personal Guarantee - Agreement Specific (At credit's request)
- Foreign Currency Indemnity Form (At Credit's request)
- High Networth Acknowledgement
- Hirer Declaration (At credit's request)
- Mileage Addendum
- Permission to Sub-Hire (Long term) (At credit's request)
- Permission to Sub-Hire (Short term) (At credit's request)
- Purchase Agreement for Sale HP back
- Purchase Agreement for Sale HP back - Non Ltd Cust. Only
- Rental Schedule

Close Confirm →

Here you'll need to fill in the details for where the documents should be sent. Add yourself (the broker) first, followed by the customer.

If a guarantee is required, add a new signatory, enter the guarantor's information and ensure the "Guarantor" box is ticked. You can also select the main customer to be the guarantor if required.



The Guarantor will only be required to sign the guarantee document. They won't be asked to sign the main contract document. The 'Customer' role is responsible for this.

Proposal name: DemoTest2 Reference No: B095512

Summary Document landing page Add signatories Confirmation page

Add signatories

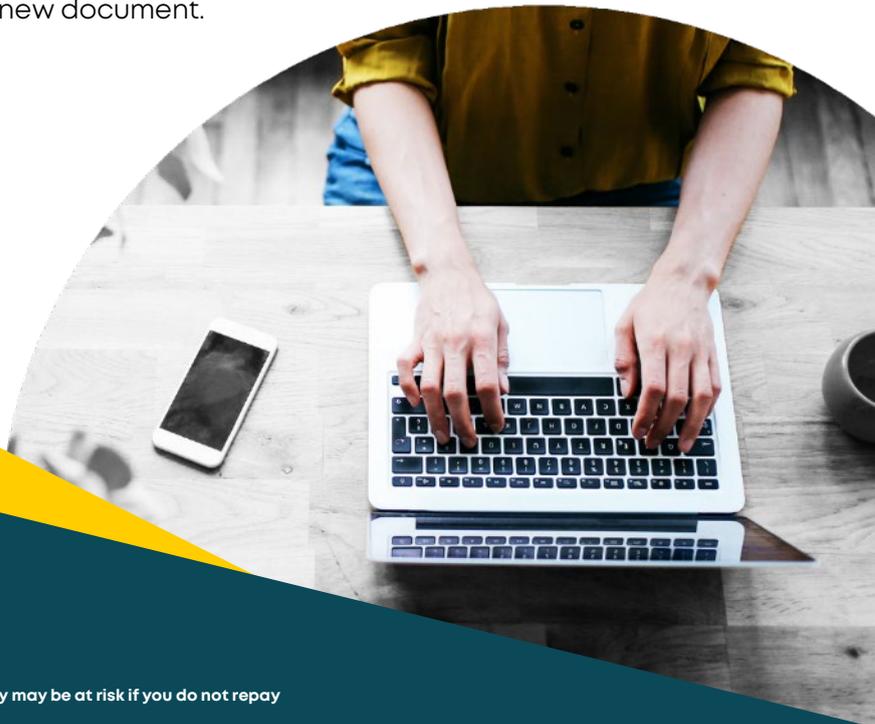
	First Name	Last Name	Email	Mobile phone	Address	Position	Required	
1	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	1 Broker Lane	Broker	<input type="checkbox"/>	<input type="checkbox"/>
2	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		Customer	<input checked="" type="checkbox"/>	<input type="checkbox"/> Guarantor

→



Please take care to enter the correct details on this page. The customer will receive an SMS to open their eSign document.

Submit the information to generate the new document.



FOR INTERMEDIARY USE ONLY

T&Cs will apply, subject to status and affordability. Any asset used as security may be at risk if you do not repay any debt secured on it.

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