



# Completing and submitting eSign documents in the Asset Backer portal

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# How-to guide

## Completing eSign documents

After generating the documents, you will receive confirmation that the email has been successfully sent to the signatories.

Almost immediately, you'll receive an email from Aldermore Bank with a link to review and fill out the documents.

**Unregulated Hire Purchase (Fixed Rate)**

Equipment details: Please use B0124 (447) (44)

Leasing details: Please use B0124 (447) (44)

Financial details: Please use B0124 (447) (44)

Equipment	Make/Model	Quantity of equipment	Credit enhanced	Residual value	Rate of finance	Rate of finance
1	1	1				
2	1	1				
3	1	1				
4	1	1				
5	1	1				
6	1	1				
7	1	1				
8	1	1				
9	1	1				
10	1	1				

## Aldermore Bank Has Sent You [DEMO USE ONLY] B095512 to Fill

Private message to you:  
All the relevant parties have signed the required documentation. Please attach the required documents in order to submit for payment (including Invoice).

[Click here to review and fill \[DEMO USE ONLY\] B095512.](#)

After you fill [DEMO USE ONLY] B095512, the agreement will be sent to them, all parties will be notified via email.

If you need to delegate this document to an authorized party for filling, please do not forward this email. Instead, [click here to delegate](#).

Clicking the link will take you straight through to Adobe, where you can fill in the documents to send onto your client. These documents are pre-populated but you can fill out the editable fields marked in yellow, such as contact information, equipment details. The financials are non-editable. If you identify any issues at this stage, you will need to amend your proposal in Asset Backer, and resubmit it for approval.



**You will notice a payout checklist appended to the document pack. Please note this is only visible to you, the broker. The customer can't see this.**

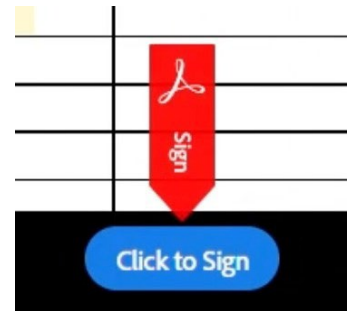


Once your client has signed the necessary fields, they can follow the blue tabs through any optional documents, where they'll need to review, fill in and then **'Click to Sign'**.



**Did you know that you can track the real time status of your documents?**

**On the Document Generation page, select 'Check signatory status' from the dropdown list.**



## Completing eSign documents

The document will now be returned to you, the broker, for final validation and approval. You'll receive a final email with a link to the signed forms, click through and check the relevant documents have been signed and dated.

You'll see the payout checklist at this point, where you can add any additional documents that we'll need to payout. **Your customer will not see any documents you upload to the checklist.**

Select and attach the relevant documents and these will append to the bottom of your document pack.



**Add any additional documents that we'll need to payout. As a minimum we need the following, otherwise we cannot proceed:**

- **The signed document pack**
- **Supplier invoice**
- **Your commission invoice**

**Click to approve**

Once you've approved the documents, these will be sent to Aldermore to check and payout. You can keep an eye on the latest status on the **'Track proposals' page**, where we update statuses every five minutes.



### 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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**Aldermore**