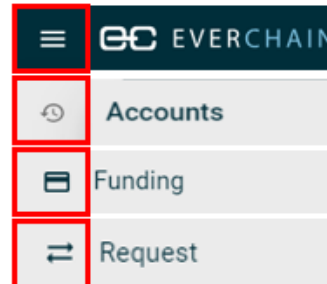


Type: **Post-Sale Funding section management.**

Feature Description: Managing Funding requests on the platform.

1. From the "3 lines" icon in top left corner,
 - o Click "**Accounts**" clock icon
 - o Click "**Funding**" Credit-Card icon
 - o Click "**Request**" Opposite arrows icon



The Funding Request screen will display these four cards at the top of page:

1. **Unpaid** (status: Pending Seller Funding)
2. **Pending Funding** (statuses: New, Pending Buyer Funding Confirmation)
3. **Paid** (status: Closed)
4. **Withdrawn** (status: Withdrawn)

Post-Sale Funding Requests



2. Unpaid card: On this card resides Buyback Post-Sale requests that have been accepted and Direct-Pay Post-Sale requests in the status of "*Pending Seller Funding.*" These requests are now awaiting the creation of a Funding ID for each on the Seller's end. (See the "*Creating a Funding request*" guide.)

3. Pending Funding card: Once the Seller has created a Funding ID, the request is now moved to the Pending Funding card in "**New**" status, awaiting processing of payment. Click on Request and click "**Generate Report**" for an invoice document that can be provided to the Accounting Team. Once the Accounting Team processes payment(s), go back into the request and enter the Funding information (Date Sent, Check/Reference #, Payment Method, Tracking # or note if applicable), then click Submit. The request is now changed to "**Pending Buyer Funding Confirmation**" status for Buyer to confirm once payment is received.

5 Requests

ID	Seller	Buyer	Status
11	Lender One	Buyer One	Pending Buyer Funding Confirmation

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> Search by Post-Sale Funding ID (23)

Lender One

< Funding Details ID: 11 Status: New From: Lender One To: Buyer One Amount: \$729.43

Generate Report Withdraw Submit

Information

Created by: Lender One

Created on: 01/19/2023

Reference or Check number:

Date sent: N/A

Payment method: N/A

Confirmed sent on: N/A

Confirmed sent by:

Confirmed received on: N/A

Confirmed received by: N/A

Date sent: 05/06/2024

Click Reference Number

Payment Method

Bank Account

Bank name: Bank USA

Routing No.: XXXXXX789

Account No.: XXXXXXX891

Account Type: Checking

Street: N/A

City: N/A

State N/A

Postal Code: N/A

Comments

Attachments

Comments

Enter a new comment

NOTE: Tracking number and notes should be entered in the “Comments” section

4. Paid card: Once payment has been received by the Buyer and funding is confirmed on their end, the Funding request is moved to Paid card and changed to “Closed” status.

5. Withdrawn card: Any Funding requests that have been withdrawn will be housed on this card in “Withdrawn” status.

NOTE: Pending funding requests can be exported to Excel on each card.

Export to Excel