

Outfund.

Onboarding Guide

Welcome to Outfund!

We're looking forward to working with you to accelerate your growth.

The following guide is designed to help you (and your team) navigate your account and make the most of your Outfund facility.

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Need further help?

We are here 24/7 to support you. Our friendly support team is available on the live chat located on the [out.fund website](#)!

01

Using your Facility

Invoices

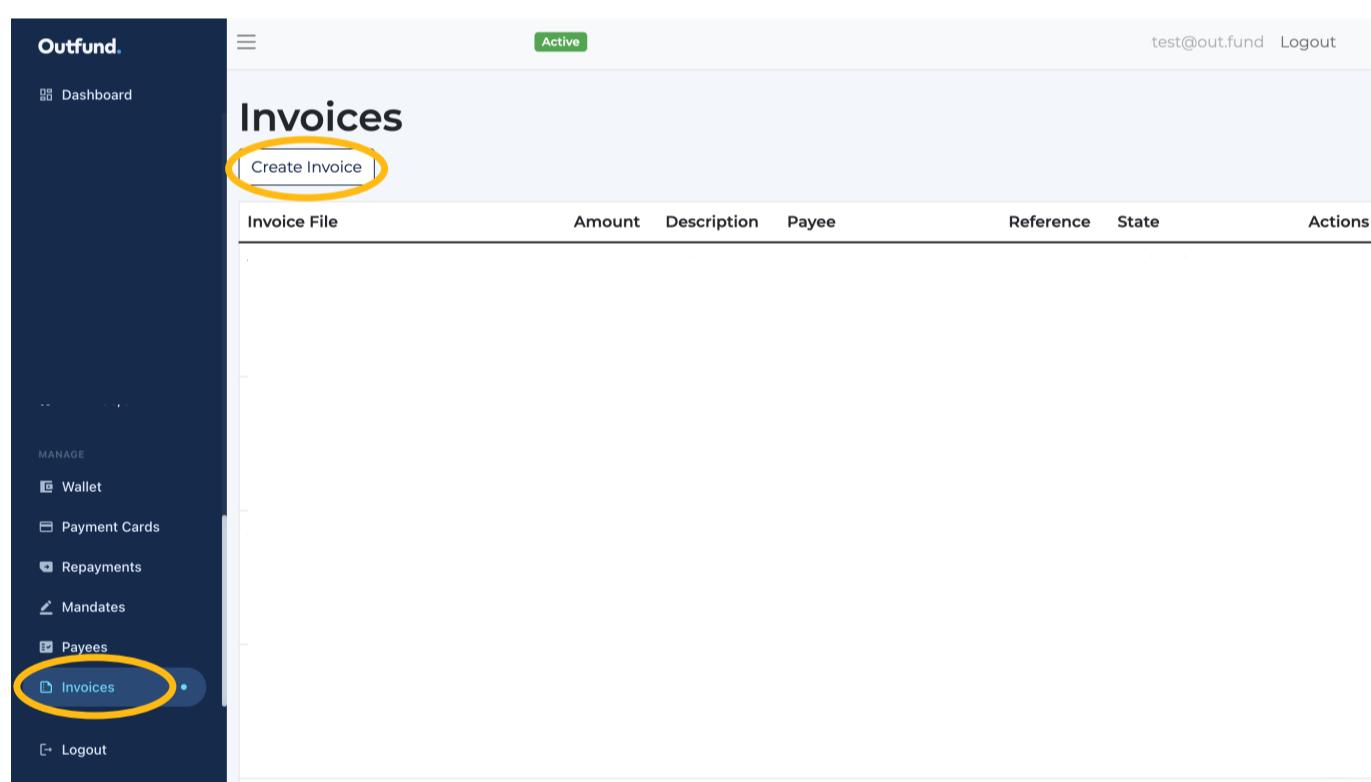
We can accept any unpaid business-related invoices - subject to approval from our compliance team. All domestic invoices are paid directly to the supplier.

To avoid delays, please ensure all invoices are unpaid, within the due date and have the following:

- Your business name
- The amount to be paid
- The logo and the name of the supplier
- The issue date of the invoice (which should be within a reasonable timeframe of the upload date)
- Bank account details
- A transparent, coherent breakdown of the products or services being purchased

How to upload an Invoice

To upload an invoice, navigate to your Invoice tab and click 'create invoice'. If you have multiple invoices for the same supplier, please merge them into one PDF file and enter the total invoice value.



International Invoices

For international invoices, please create a new payee for your company, using your bank details and enter the equivalent currency amount using the mid-market exchange rate. We will then transfer funds to your account so that you can use your preferred FX provider.

Two side-by-side forms. The left form is 'Create new Invoice' and the right is 'Create new Payee'. Both forms have fields circled in yellow.
Create new Invoice:
Payee dropdown (set to 'testagain') with an 'Add new Payee' button (circled).
Amount field (with a £ symbol) and Reference field.
Invoice file field with 'Choose file' button and note: 'No file chosen'.
Description text area.
Submit Invoice button.
Create new Payee:
Name field (with a person icon) and Phone field (with a telephone icon).
Sort code field and Account number field.
Create Payee button (circled).

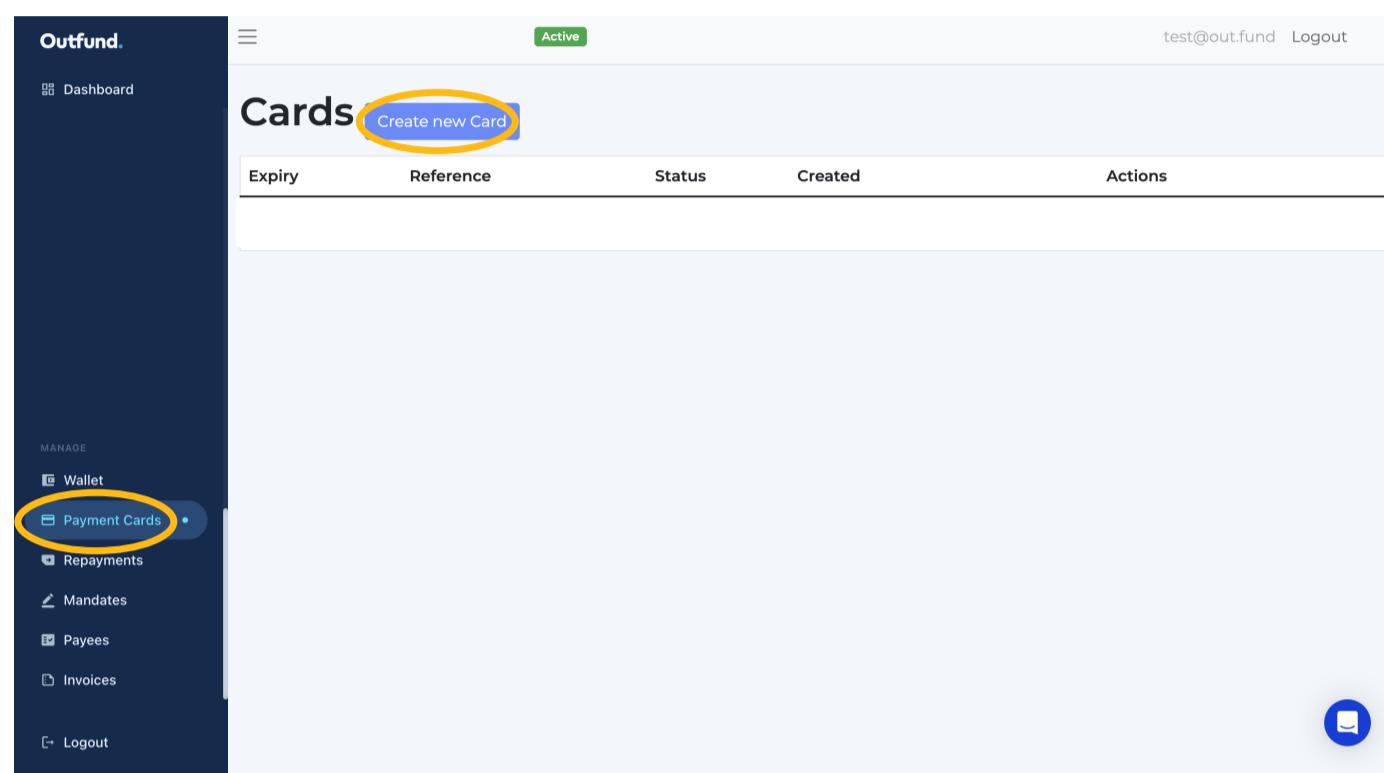
We aim to process all invoices within two working days.

Card

How to setup your Outfund Card

Your Outfund card can be used to fund digital marketing spend through approved advertising platforms (Facebook, Google, TikTok etc).

To set up your Outfund card, navigate to the Payment Cards tab and click 'Create new Card'.



Please note, only the main user of the account will be able to create a card.

Once you have set up your pin and revealed your card details, head over to your advertiser's billing page and enter the card details. If asked for an address, please enter your registered company address.

We're just setting up your new payment card. You will receive an email with instructions on how to set this up within a few minutes...			
Cards			
Expiry	Reference	Status	Created
2024-07	HW-3004-d4f7	pending	14 Jul 09:26

02

Additional Funding

We look to be a long-term growth partner, providing multiple tranches of capital and can assess eligibility once you have repaid 33% of your facility, subject to our underwriting team's assessment.

As a responsible lender, we are committed to providing a sustainable level of funding that is affordable to our clients.

For this reason, taking any additional short-term funding during the term of the Outfund facility is a breach of contract and may affect eligibility for further funding.

03

Repayments

Repayments are made via direct debit and will start from the day your account is activated, regardless of utilisation.

Direct debit mandates will take 1-2 weeks to set up and the first direct debit will take into account the days since your account was activated.

You will receive an automated email once a direct debit has been issued and you can track all pending direct debits on your Repayments tab.

Please note, direct debits are not issued over the weekends or bank holidays and will take a few days to clear and appear on your Facility tab.

ID	Facility	Payment ID	Amount	Status	Charge date
45905	VE-4155/7 (RBF)		\$1.10	Completed	2022-07-14
45486	VE-4155/7 (RBF)		\$1.00	Completed	2022-07-12

If you have concerns about making a direct debit or questions about how it was calculated, please get in touch.

04 FAQs

How do I add a new user to my account?

You can request a new user by getting in touch via our livechat.

I've received an email asking me to reconnect my bank account, is this legitimate?

We utilise Openbanking which provides us with a 90 day read-only connection to your account. Every 70 days, you will receive an automated email asking you to reconnect.

I've missed a direct debit - what do I do?

If you have missed a payment, please get in touch as soon as possible so that we can arrange to get you back on track.

My account has been suspended - what do I do?

Your accounts will be automatically suspended if a connection has been disconnected, direct debits mandate cancelled or if a direct debit fails. Once suspended, you will not be able to access any available funds in your wallet. To unsuspend your account please get in touch via our livechat.

05

Partnerships

We look to partner with the best-in-class service providers to give you exclusive rates to support your growth.

Payments



Funding



Accounting



Logistics



Marketing



BI



Cloud



Banking



HR



Customer Service



Interested? Get in touch for more information at partnerships@out.fund