DealerZone Update

e-Sign In-Showroom now using Sign Anywhere solution

April 2022
v1.0

EVOLUTION
FUNDING

We've recently made some updates to our e-Sign In-Showroom process as part of our ongoing improvements in supplying a clear, transparent and compliant payouts solution.

The major update now uses the Sign Anywhere solution in order to complete the payout with the customer in your showroom, replacing the previous upload features.
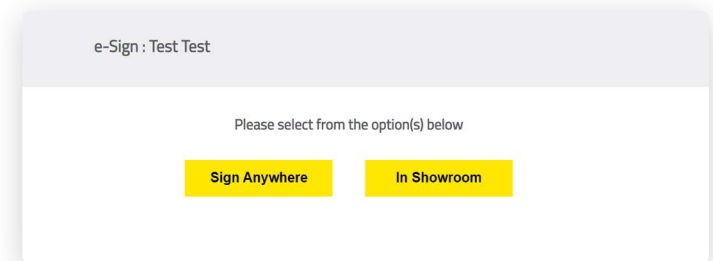
The key benefits in using the Sign Anywhere solution include:

- Automatic driving licence checks resulting in quicker payouts

- Enhanced compliance with adequate explainer videos, forming part of our audit trail

Here's a quick guide through the new In-Showroom process using the Sign Anywhere solution.
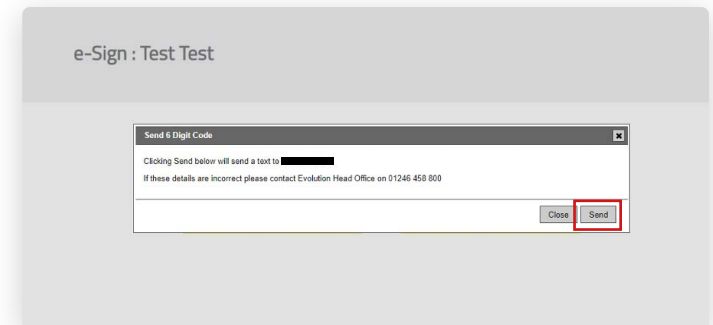
Step 1:

Click on **In-Showroom** to proceed with the signing.


Step 2:

Click Send to activate a 6-digit code sent via SMS to the customer to access the Sign Anywhere solution. If the customer hasn't received an SMS, then check that their mobile number is correct in the customer screen.

Step 3:

Either upload an invoice now, or tick upload later to continue.

Upload Proofs relates to proofs for any additional acceptance conditions. Standard proofs such as driving licence and selfie are collected in the next section.
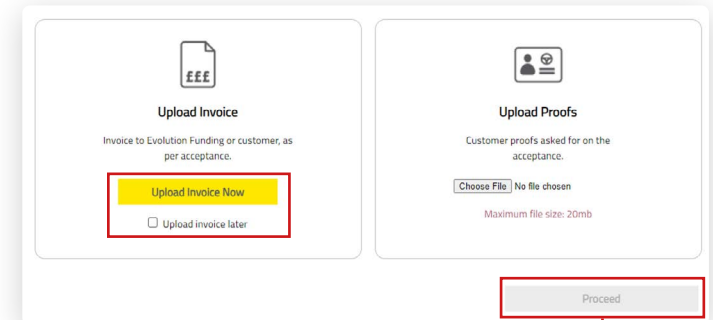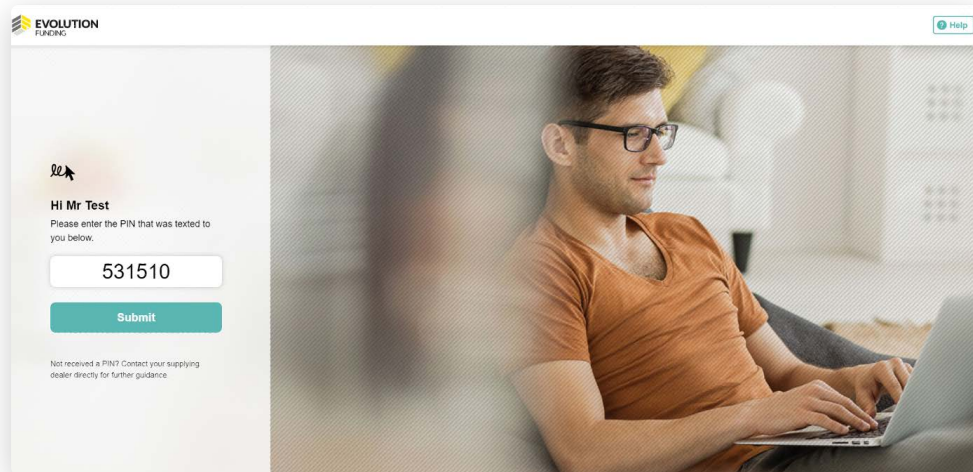

Step 4:

Click Proceed to continue. This now takes you through to the Sign Anywhere solution, and should be where you turn the screen to the customer to continue.

Step 5:

The customer should type the 6-digit code sent via SMS into this box and click **Submit** to continue.
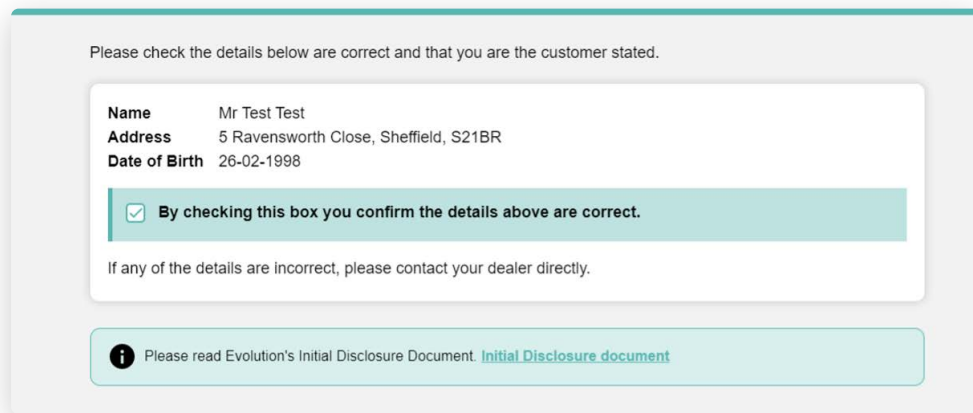
Step 6:

On the confirm details page, the customer checks to confirm their identity and can proceed to the upload proofs section.
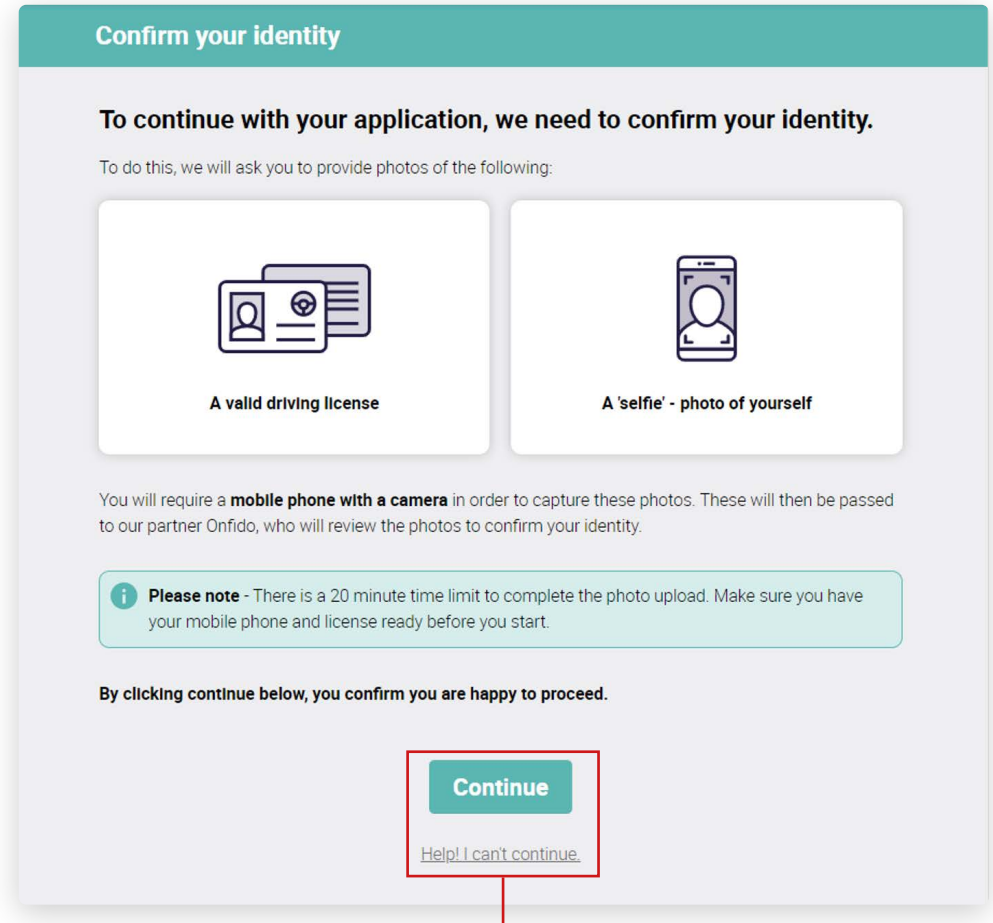
Step 7:

For this section, the customer requires a mobile phone with a camera in order to complete the ID confirmation.

If the customer does not have a mobile phone with a camera, they can click the '**Help! I can't continue**' link below the continue button; here they can upload scanned copies of documents from your computer if they have sent these documents to you previously.

If the customer does have a mobile phone with a camera then they can continue.

Step 8:

Click '**Verify Identity**' and select the document type to upload.

Upload Proofs

Identification Check

We need to verify your identity before proceeding.

Please have your phone ready for completion.

Verify Identity

Upload Proofs

←

Verify your identity

**Select the document type to upload**

🚗 **Driver's license**
Front and back
›

Step 9:

The customer now requires their mobile phone to continue with the verification process – click '**get secure link**' to activate.

Upload Proofs

←

Continue on your phone

Here's how to do it:

A secure link is sent to your phone

Open the link and upload your documents

Return here to finish verification

**Get secure link**

Powered by onfido

Step 10:

There are 3 methods for obtaining the secure link on the customer's phone:

1. Scan the QR Code – using the camera on their mobile, hold the QR code in the centre of the phone screen; a link to a webpage will pop up on the phone screen where they can click to continue

2. Get link via SMS – the customer can enter their mobile number, where an SMS containing the webpage link will be sent, which they can then click to continue

3. Copy link – the webpage URL will appear, and the customer can choose to copy the link onto a webpage on their mobile to continue
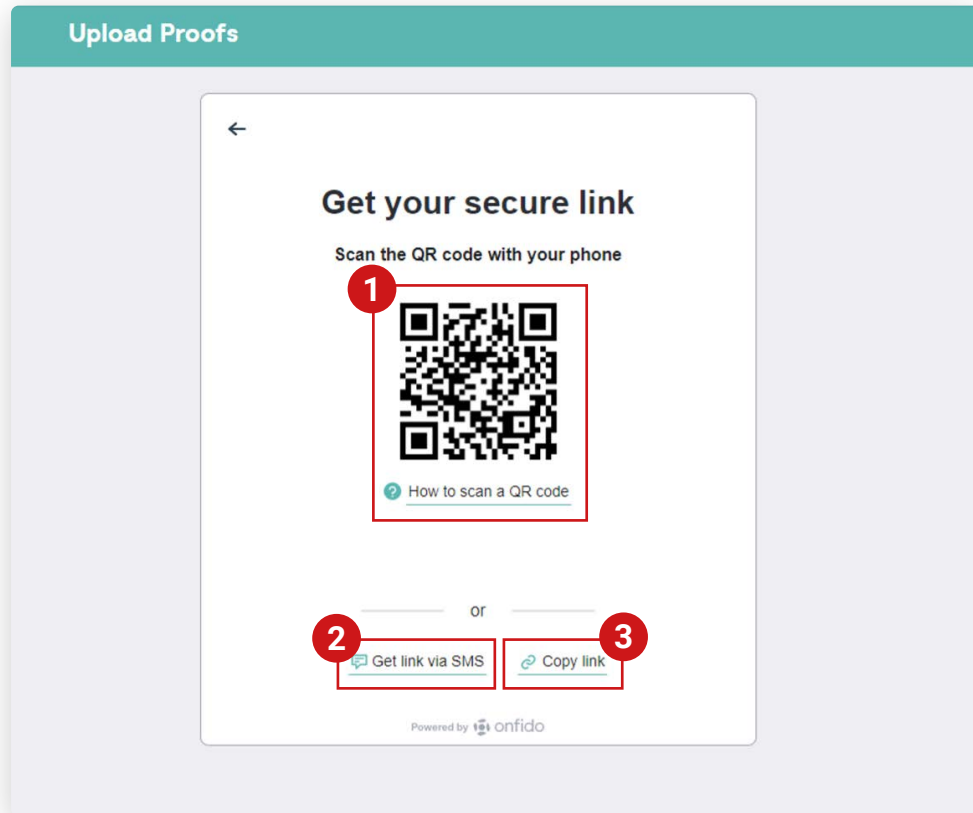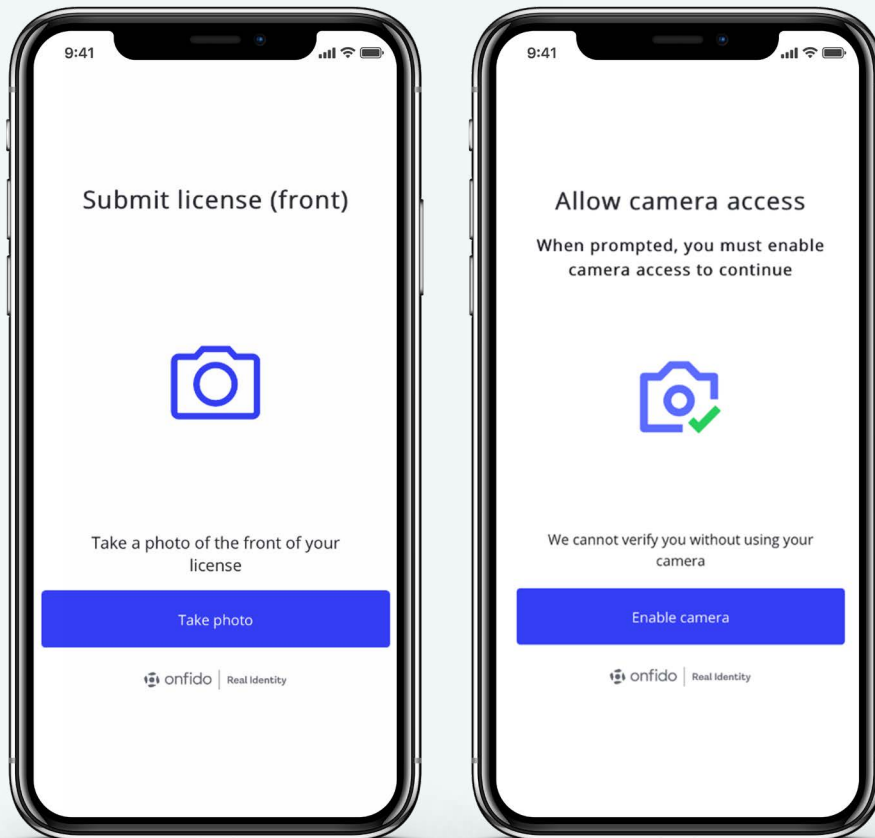

Step 11:

Once the customer has clicked on the webpage link on their mobile, the following screen changes on the computer desktop. The customer now completes the next section on their mobile.
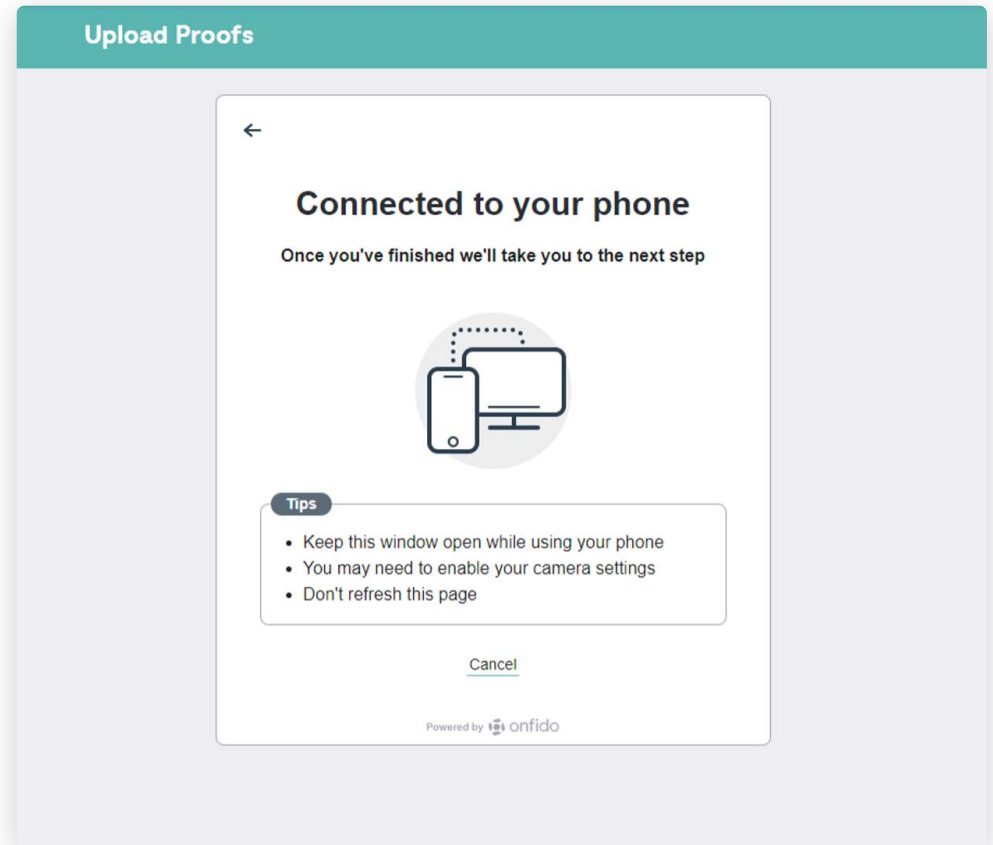
Please note:

The technology partner, Onfido, require access to the front and back camera of the customer's mobile phone to be able to complete the process. Wherever an **'allow camera access'** page is shown, please click **'Enable Camera'** to continue.
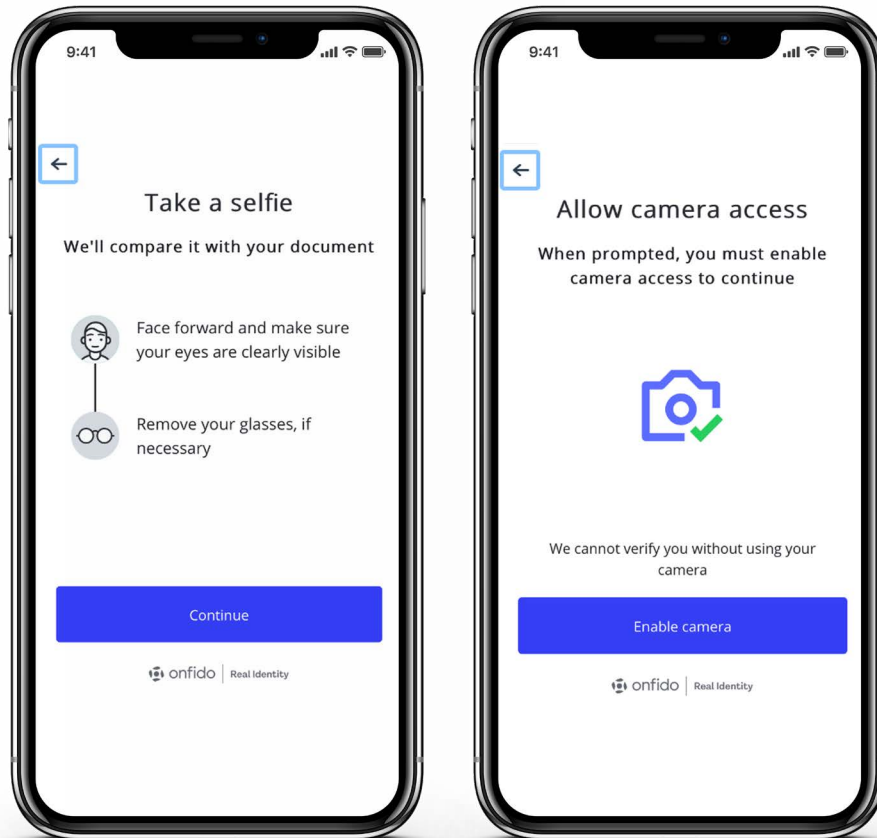

Step 12:

Take a picture of the front and back of the driving licence. If the image is too small it will advise you to **'Enlarge Image'** which can be done by pressing 'Redo' Once there are no warnings on the image, press **'Confirm'**.

Once the photos of the ID are completed, it's time for the customer to take a selfie.
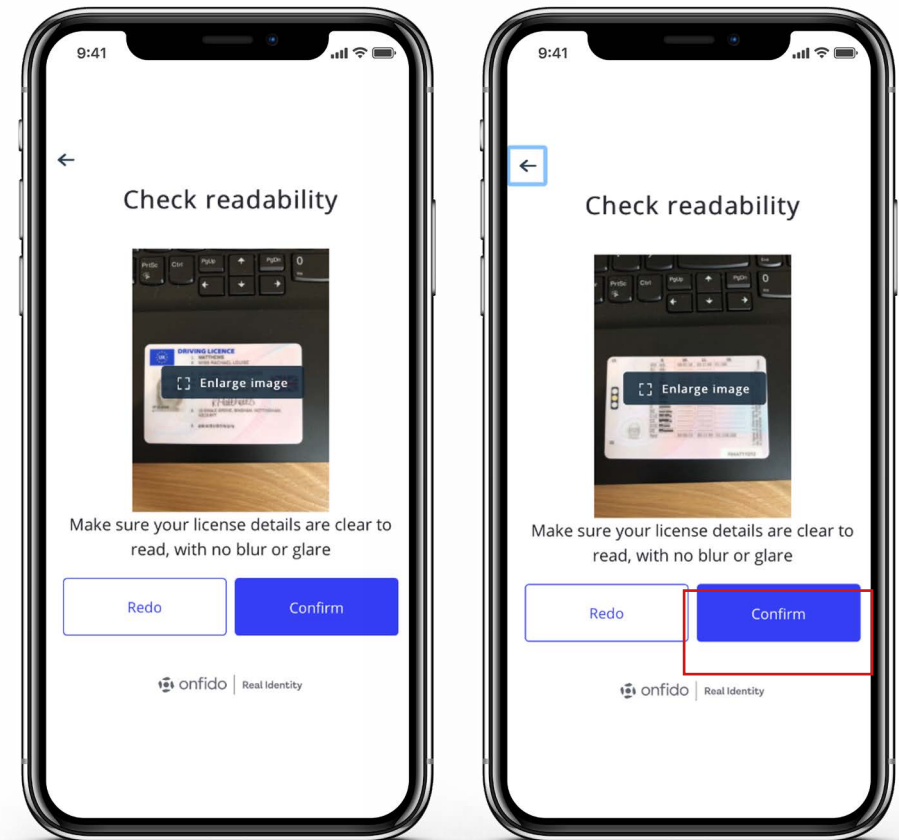
Step 13:

Read the instructions for taking the selfie and enable the camera for the front of the mobile.

Step 14:

The customer puts their face into the silhouette – once they are happy that they are in the centre of the frame and are ready to take the picture they click the picture button.

Once all images captured the customer sees this screen on their mobile, confirming that the upload has been successful.
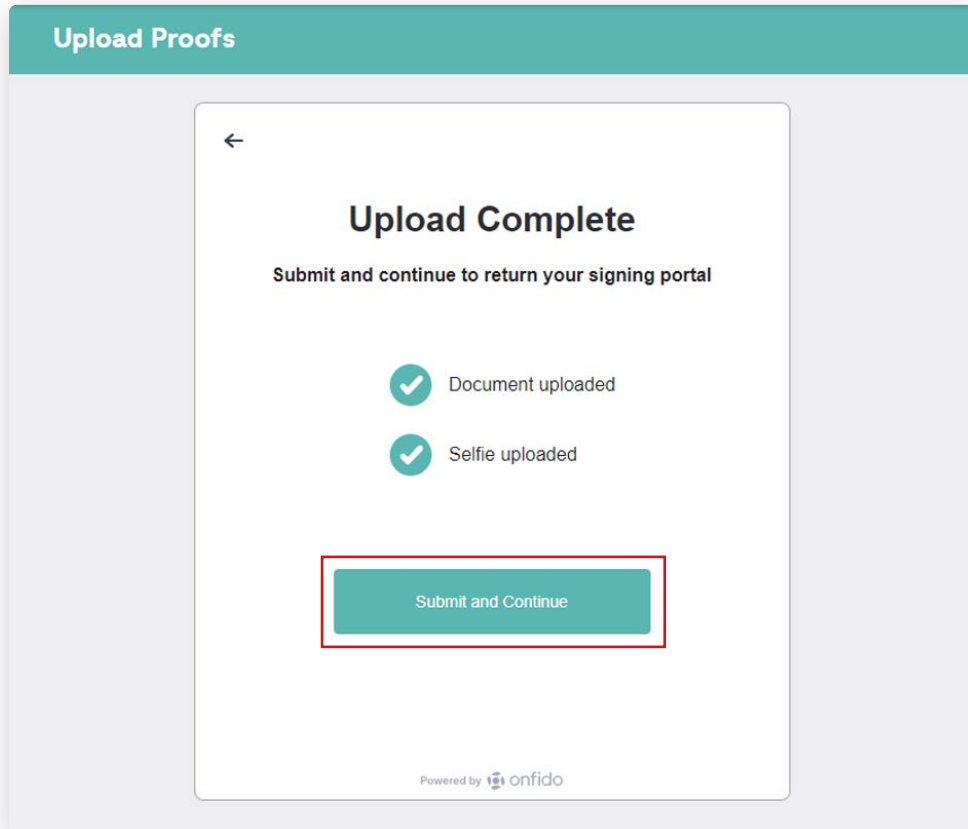
The rest of the journey continues on the desktop computer.
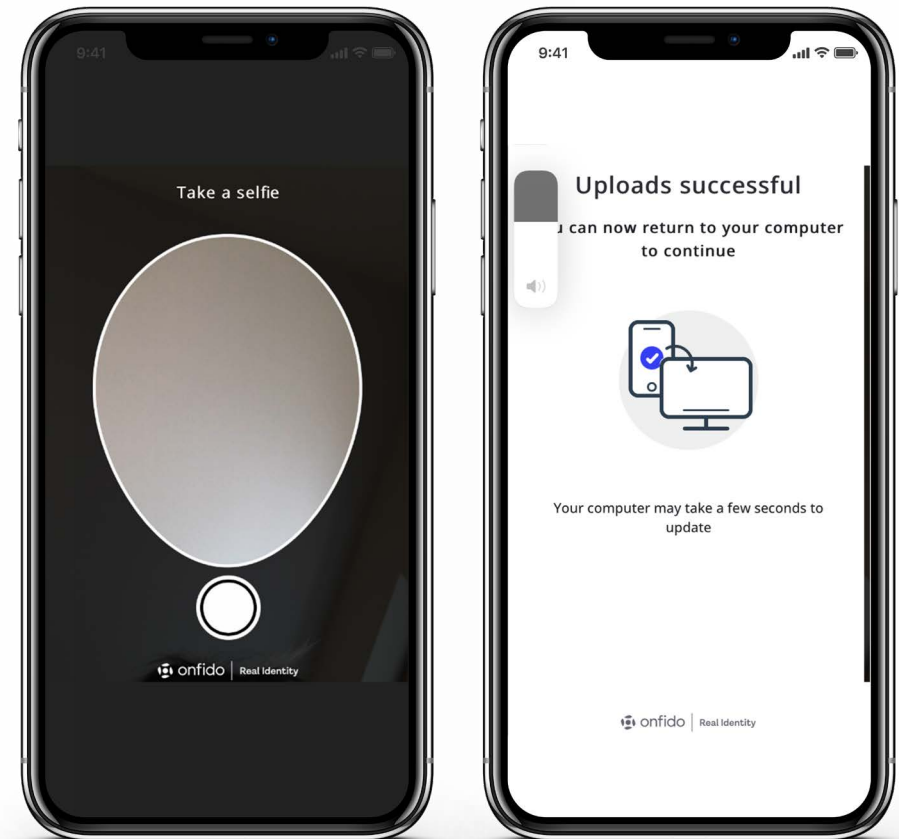
Step 15:

The desktop updates to this screen – confirming that the customer has uploaded both documents and selfie, they can then **submit and continue**.

This completes the Onfido verification process, and the customer then moves on to the compliance section of the e-Sign.

Step 16:

The customer either watches the video, downloads a PDF or Emails a PDF for adequate explanations regarding the finance application. They then tick to confirm they understand the statements, which is logged against their application within Evolution systems.

Step 17:

The customer next reads the data processing notice, which details the finance companies where their details were sent as part of the application process. They can click **proceed** to continue.

Step 18:

The customer reads this notice and understands that a code is located in the signature boxes on their finance document that needs to be put in the signature box.

The customer presses **continue**.

Step 19:

The security checks are now complete, and the customer can then proceed to complete the lender's e-Sign on their platform.

Security checks complete

Thank you for completing this stage of the e-Sign process. We will now transfer you to our finance company's secure finance portal where you will complete your finance agreement.

If you have any questions about the terms and conditions of your agreement, please contact your supplying dealer in the first instance.

❓ If you have any problems during the e-Sign process, please start by using our handy guide - in most cases, this will save you a phone call.

Proceed to e-Sign

Please note:

Following the completion of the lender's e-Sign , the application status will now change to '**Payout Received**' - you no longer need to complete stages 3, 4 and 5 to continue the payout.'

Have any questions?

Please contact your Account Manager or the Dealer Support Team who will be able to offer further guidance.