

LIMITED - EXTERNAL

DealerZone Update
e-Sign In-Showroom now
using Sign Anywhere solution

April 2022
v1.0



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.

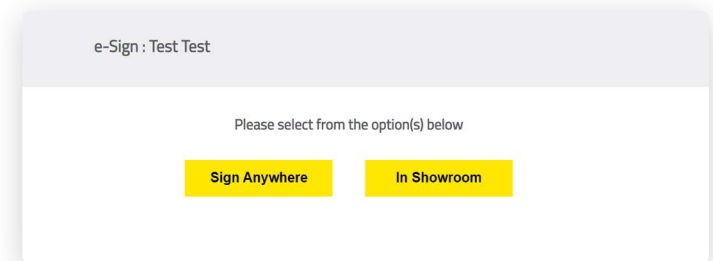
The key benefits in using the Sign Anywhere solution include:

- 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.

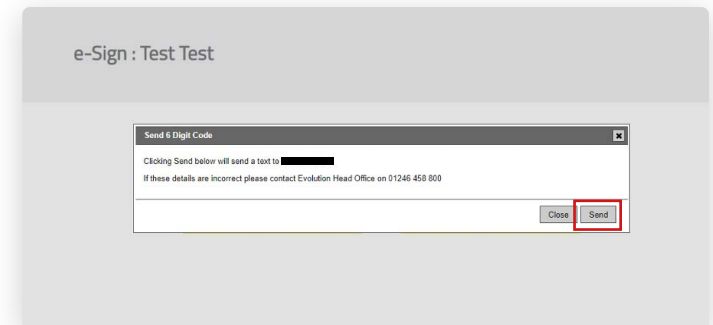
Step 1:

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



Step 2:

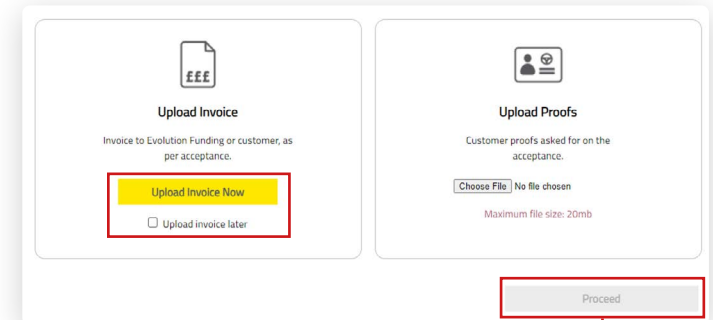
Click Send to activate a 6-digit code sent via SMS to the customer to access the Sign Anywhere solution. If the customer hasn't received an SMS, then check that their mobile number is correct in the customer screen.



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.

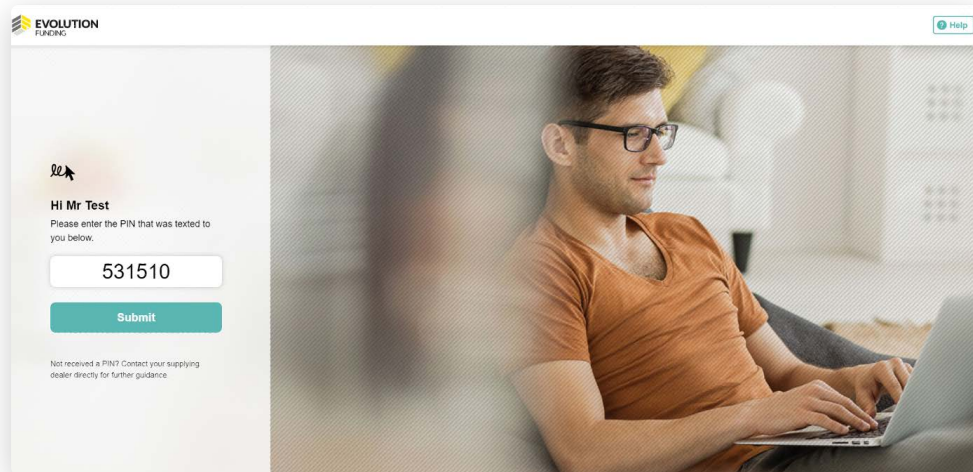


Step 4:

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.



EVOLUTION FUNDING

Hi Mr Test
Please enter the PIN that was texted to you below.

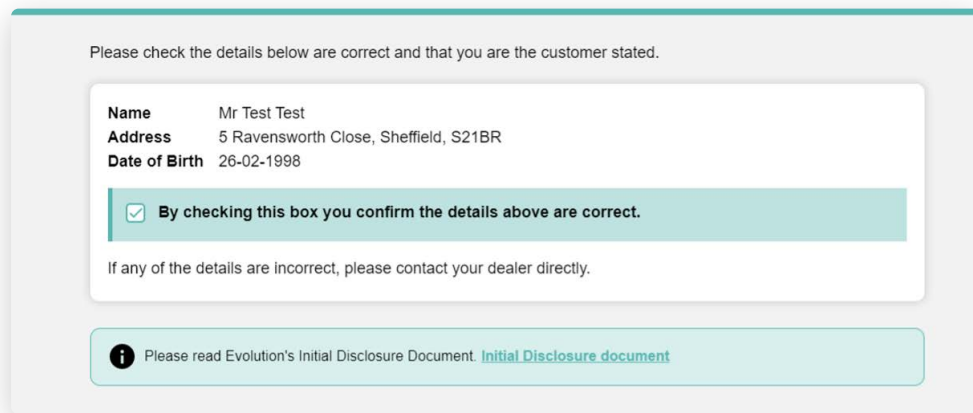
531510

Submit

Not received a PIN? Contact your supplying dealer directly for further guidance.

Step 6:

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



Please check the details below are correct and that you are the customer stated.

Name Mr Test Test
Address 5 Ravensworth Close, Sheffield, S21BR
Date of Birth 26-02-1998

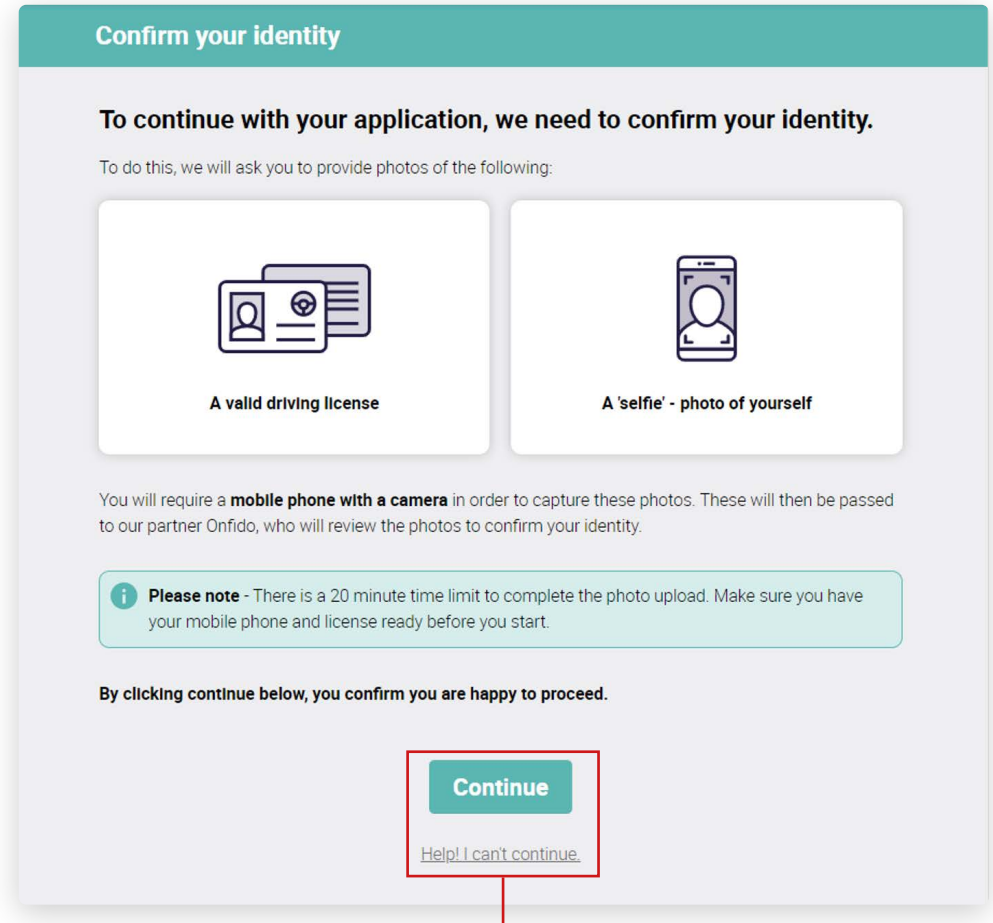
☒ By checking this box you confirm the details above are correct.

If any of the details are incorrect, please contact your dealer directly.

Please read Evolution's Initial Disclosure Document. [Initial Disclosure document](#)

Step 7:

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



Confirm your identity

To continue with your application, we need to confirm your identity.

To do this, we will ask you to provide photos of the following:

- A valid driving license
- A 'selfie' - photo of yourself

You will require a **mobile phone with a camera** in order to capture these photos. These will then be passed to our partner Onfido, who will review the photos to confirm your identity.

Please note - There is a 20 minute time limit to complete the photo upload. Make sure you have your mobile phone and license ready before you start.

By clicking continue below, you confirm you are happy to proceed.

Continue

[Help! I can't continue.](#)

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.

The first screenshot shows the 'Upload Proofs' header in a teal bar. Below it, a white box titled 'Identification Check' contains the text: 'We need to verify your identity before proceeding.' and 'Please have your phone ready for completion.' A teal button labeled 'Verify Identity' is highlighted with a red border.

The second screenshot shows the 'Upload Proofs' header. Below it, a white box titled 'Verify your identity' contains the text: 'Select the document type to upload'. Below this is a list item with a car icon, the text 'Driver's license' and 'Front and back', and a right-pointing chevron. The list item is highlighted with a red border.

Step 9:

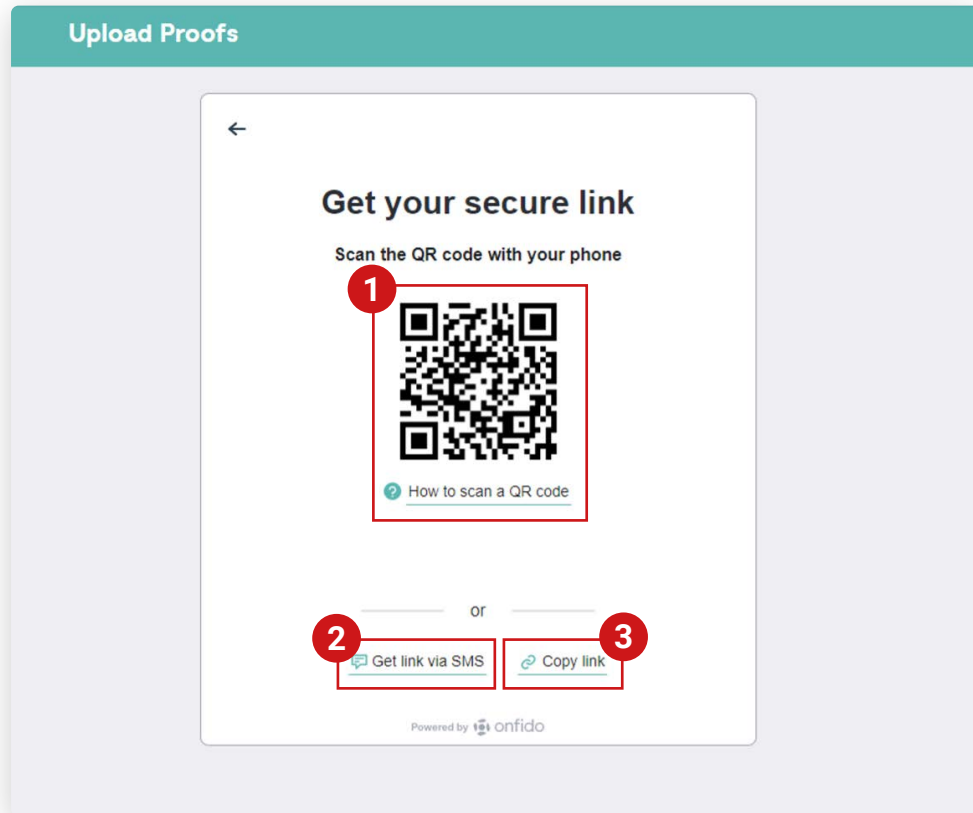
The customer now requires their mobile phone to continue with the verification process – click '**get secure link**' to activate.

The screenshot shows the 'Upload Proofs' header in a teal bar. Below it, a white box titled 'Continue on your phone' contains the text: 'Here's how to do it:'. Below this is a vertical flow diagram with three steps: 'A secure link is sent to your phone', 'Open the link and upload your documents' (accompanied by a smartphone icon), and 'Return here to finish verification'. A teal button labeled 'Get secure link' is highlighted with a red border. At the bottom, it says 'Powered by onfido'.

Step 10:

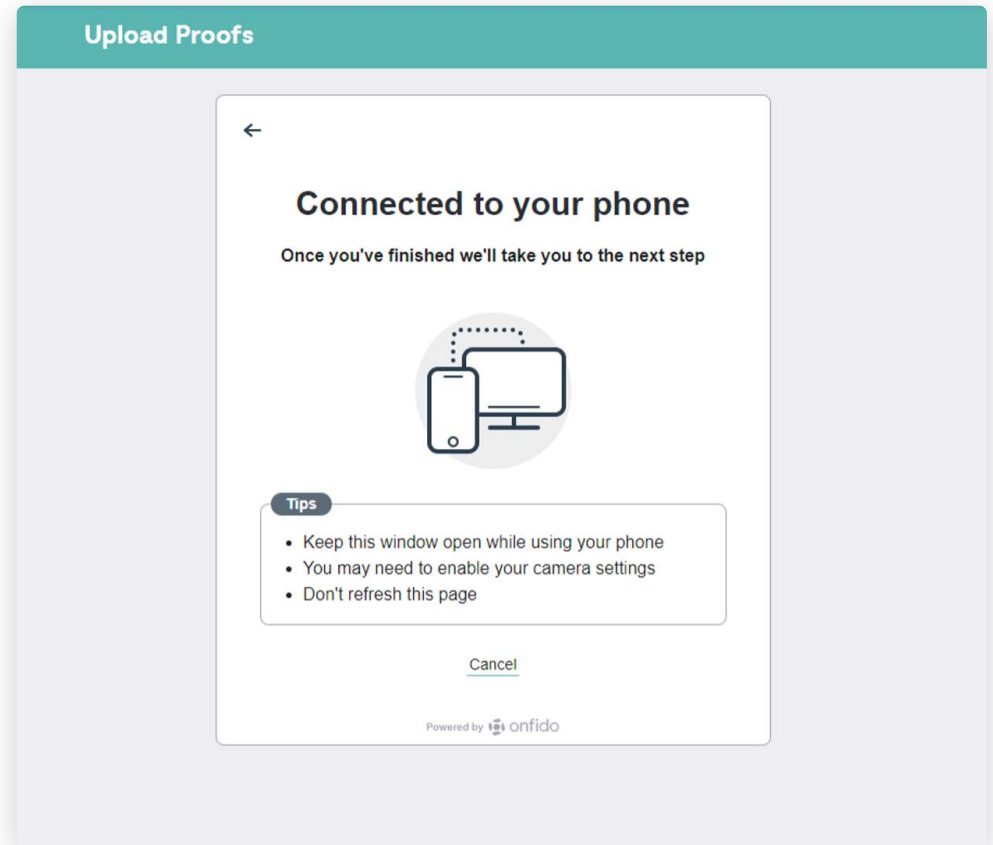
There are 3 methods for obtaining the secure link on the customer's phone:

- 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



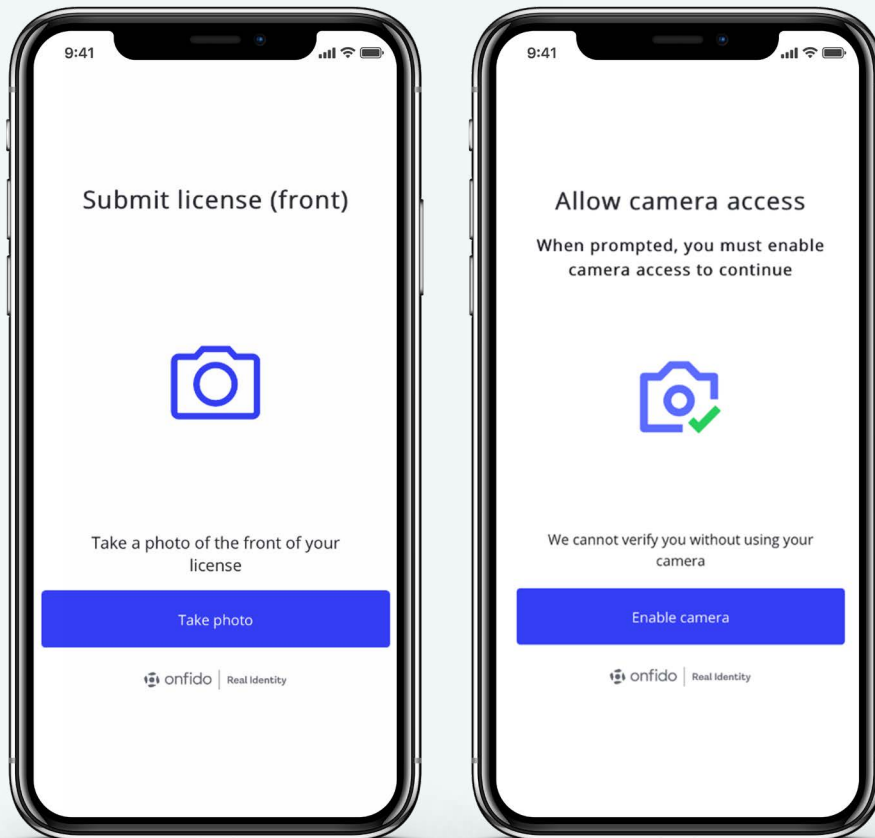
Step 11:

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:

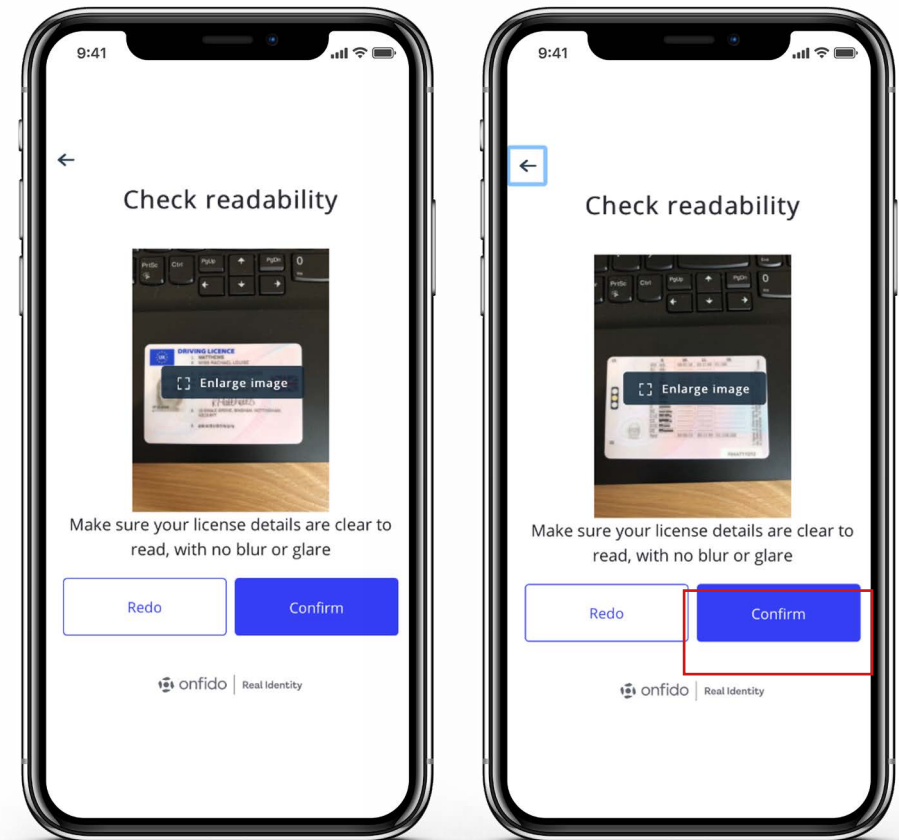
The technology partner, Onfido, requires access to the front and back camera of the customer's mobile phone to be able to complete the process. Wherever an 'allow camera access' page is shown, please click 'Enable Camera' to continue.



Step 12:

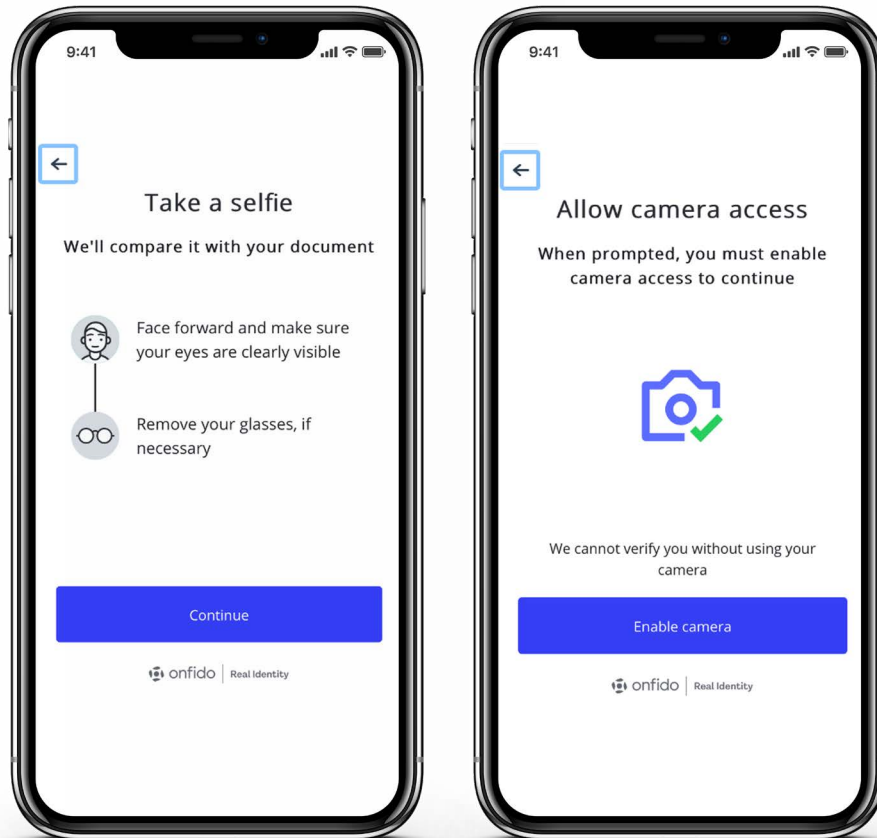
Take a picture of the front and back of the driving licence. If the image is too small it will advise you to 'Enlarge Image' which can be done by pressing 'Redo'. Once there are no warnings on the image, press 'Confirm'.

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.

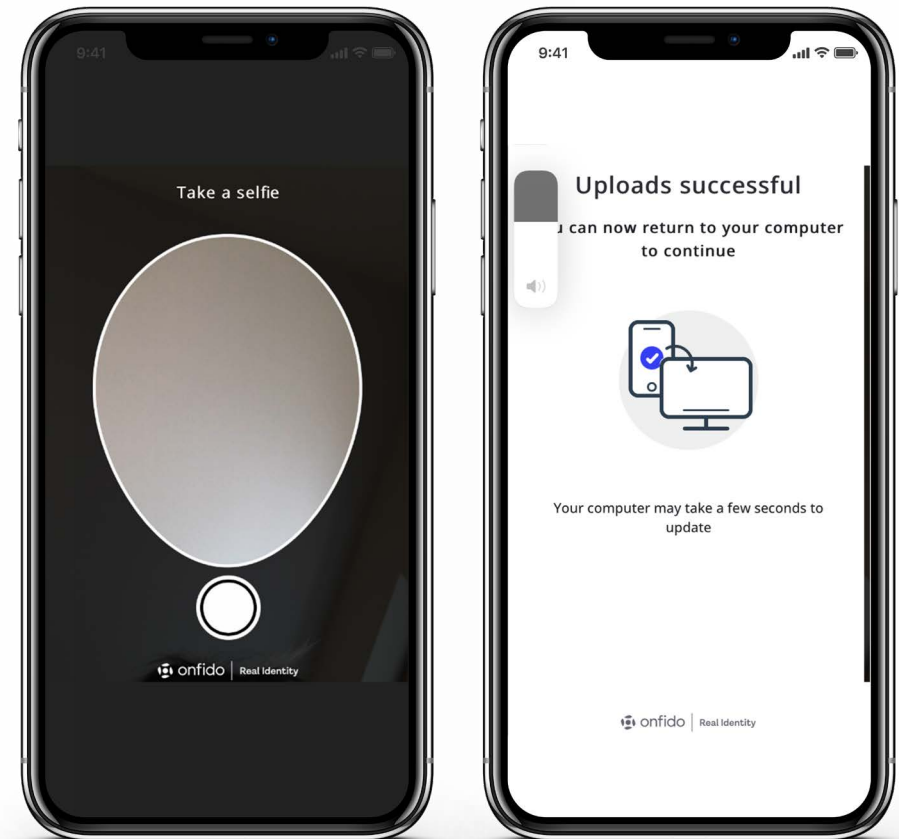


Step 14:

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.

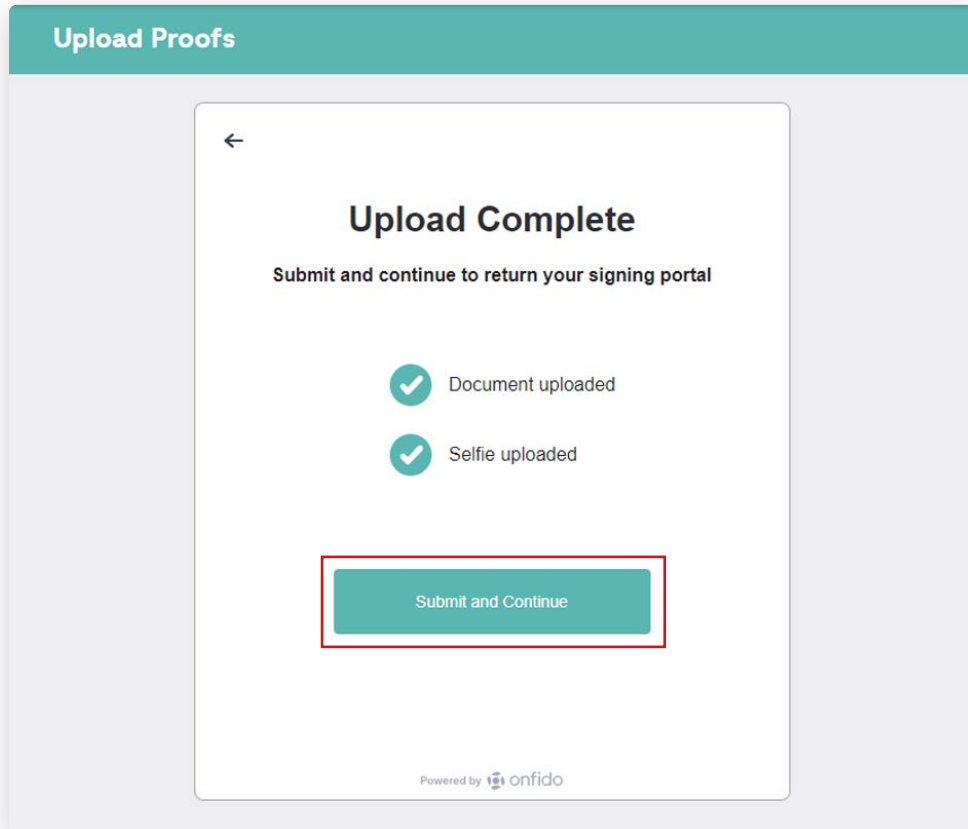
The rest of the journey continues on the desktop computer.



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.

www.evolutionfunding.com'. A teal button labeled 'Confirm' is highlighted with a red border." data-bbox="518 232 960 853"/>

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.

Data processing notice

During the process of obtaining finance on your new vehicle, it was necessary to submit your application to at least one finance company. These company's will have conducted a hard or soft search as detailed below.

Your application has been accepted with:

- Evolution Loans Ltd


These lenders received your application:

- Evolution Loans Ltd (Soft Search)


No lenders declined your application.

Finance company's take many elements into account when considering a credit application, including but not limited to; your credit file data, your personal details and details of the vehicle being applied for.


Should you require specific information related to your credit file data, the credit reference agencies we use are:



Call Credit
www.callcredit.co.uk



Equifax
www.equifax.co.uk



Experian
www.experian.co.uk

Proceed

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**.


Before you proceed

IMPORTANT PLEASE READ

To complete your e-Sign, you will need the signature codes found in your finance documents, which will be presented to you later in the e-Sign process.

This is not the code you received via text.

The codes are located in the signature boxes on your finance documents. The image shown illustrates what to look out for.



Simply copy the code in your document into the corresponding field in e-Sign. Don't worry - it will all make sense as you work through it!

Your forms may differ in layout.

By clicking continue, you are confirming you have read and understood these instructions.

Continue

[Help! I can't 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.