



# E-sign documents

**How-to guide**

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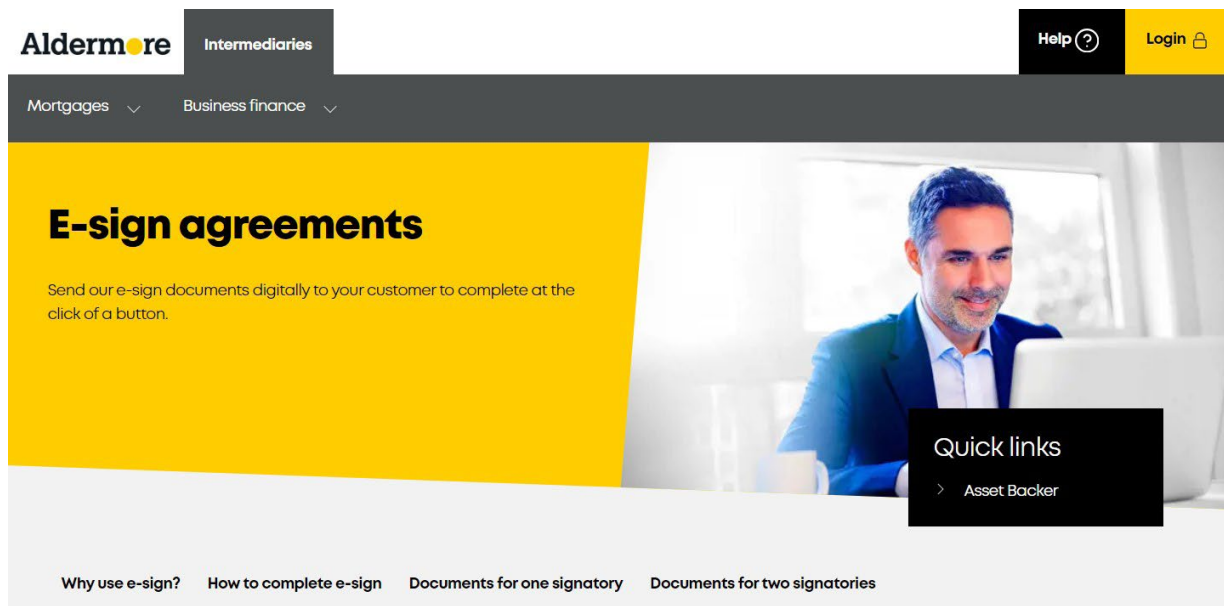
We're making getting your documents signed and paid even easier with our e-sign agreements.

Our e-sign agreements are just like our standard PDF documents, but instead of printing the document off and visiting the customer, you can send it to them digitally for signature and the documents will be sent directly to us once complete.

With anything new, we want to show you how it works to make the transition to e-sign easy.

## Step 1 – select your document

You can access our e-sign agreements by clicking [here](#). Then, select the agreement type based on the product the customer wants, and whether the document will have one or two signatories.



The screenshot shows the Aldermore website interface. At the top left is the Aldermore logo. To its right is a dark grey navigation bar with 'Intermediaries' highlighted. Further right are 'Help ?' and 'Login' buttons. Below this is a dark grey menu bar with 'Mortgages' and 'Business finance' dropdowns. The main content area has a yellow background on the left with the heading 'E-sign agreements' and the text 'Send our e-sign documents digitally to your customer to complete at the click of a button.' On the right is a photo of a man in a suit working on a laptop. A dark grey 'Quick links' box is overlaid on the photo, containing a link to 'Asset Backer'. At the bottom of the page, there is a row of links: 'Why use e-sign?', 'How to complete e-sign', 'Documents for one signatory', and 'Documents for two signatories'.

## Step 2 – complete document

**Compete the document** as normal, filling in all the required fields. All essential fields are marked with an asterisk and you won't be able to send the document to your customer to e-sign until you've completed all these fields.

Once you've completed all the mandatory fields, you can then **click Submit** at the bottom of the document.

If you haven't filled in all the essential fields, you'll receive an error message telling you what you need to complete before you can progress.

The screenshot shows a web form for 'Unregulated Hire Purchase (Fixed Rate)'. The form is divided into several sections, each with a yellow header: 'Customer details', 'Supplier details', and 'Equipment details'. Each section contains various input fields, some marked with an asterisk to indicate they are mandatory. A yellow 'Next' button is positioned to the left of the 'Customer details' section. The form also includes a 'Submit' button at the bottom right.

## Step 3 – send to your customer

Add in the name and email address of the customer signing the agreement, including a message for the recipient as well to clarify what they need to do.

You then need to add your details so you can approve the signed copy, before sending to us.

When this information is complete, **click Next** to enter your information again as added security. You'll then receive an email from Adobe asking you to confirm it's you. Simply **click Confirm My Email Address** to open up your browser and receive a confirmation message that the document has been sent to your customer to sign.

The screenshot shows the same form as in Step 2, but with a modal dialog box titled 'Assign to next participants' open in the center. The dialog box contains instructions: 'To complete the form please enter the information for the next participant. They will receive an email to complete the form.' It lists 'Participant 2' and 'Participant 3' with input fields for 'First name', 'Last name', and 'Email address'. There are also 'Add Message' and 'Add Message' buttons. At the bottom of the dialog, there are 'Cancel' and 'Next' buttons. The background form is dimmed.

## Step 4 – receiving the document back

Once your customer has signed and returned the document to you, you'll receive an email from Adobe to say the document is complete.

**Click Review and Approve** in the email, to check everything is correct and **complete the pay-out checklist**.

**This checklist allows you to attach additional documents but will be seen by the customer, so you will need to send your commission invoice separately.**

**Click Approve** to send the agreement to Aldermore to complete.

Adobe Acrobat Sign

Options ▾

01\_HP Fixed Rate

# Pay-Out Checklist

Field Name	Type	Field Name	Type
Invoice Number	Text	Invoice Contract No.	Text
Program Number	Text	Invoice Contract No.	0202826046
Customer Name	Text		

**All contract types**

Supplier Invoice	Needs to include the following: <ul style="list-style-type: none"><li>• An invoice number and date</li><li>• Supplier registration number if it is a company and VAT registration number (if applicable)</li><li>• Address to Aldermore Bank plc with the customer's contact details (if applicable)</li><li>• Full name of the principal/borrower in cases of cases - credit unions / registration number</li><li>• Year of manufacture / date of registration</li><li>• Statement of your payment liability (if applicable) by the customer or bank/ lender's title</li></ul>	
Customer contract	Must be fully completed and signed and dated by customer.	
Direct debit mandate	Account name must be the same as the contract and signed and dated by customer. <b>Acrobat Sign</b> watermark and redacted area.	
Attached and files submitted		

**Attach any documentation if applicable**

Documentation supporting credit conditions

FILE... Click to A... Click to A... Click to A...



### 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**