The 3 how to's for Signable

How to send out agreements

Why do we send out agreements through signable? Firstly – we send agreements out to ensure Create Finance and their advisors are covered. For example when the client signs the DPA they are giving permission for a credit search to be completed on their name and permission to check through their documents.

How to sign agreements

It is important that both clients and advisors know how to sign the agreements. Without the signed agreements the case cannot proceed.

How to resend agreements

Like above, the agreements must be signed before proceeding any further with the case. It is important that these agreements are chased and resent.

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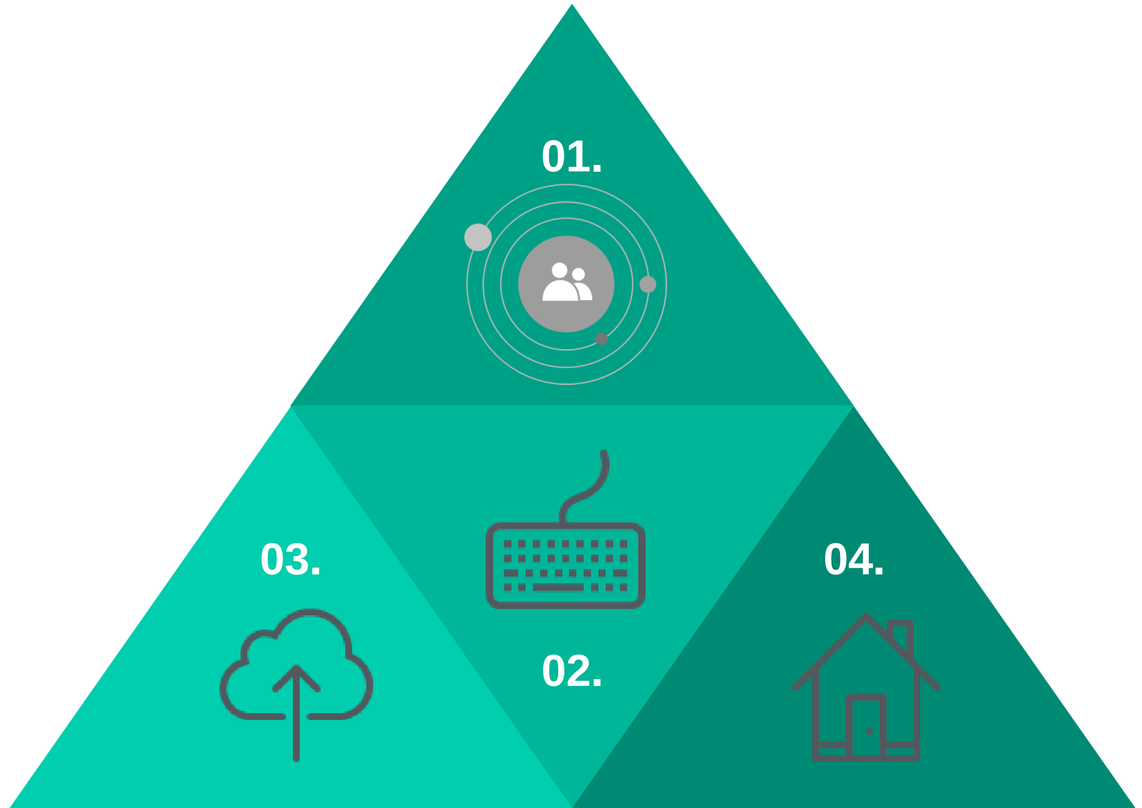
How to send out agreements



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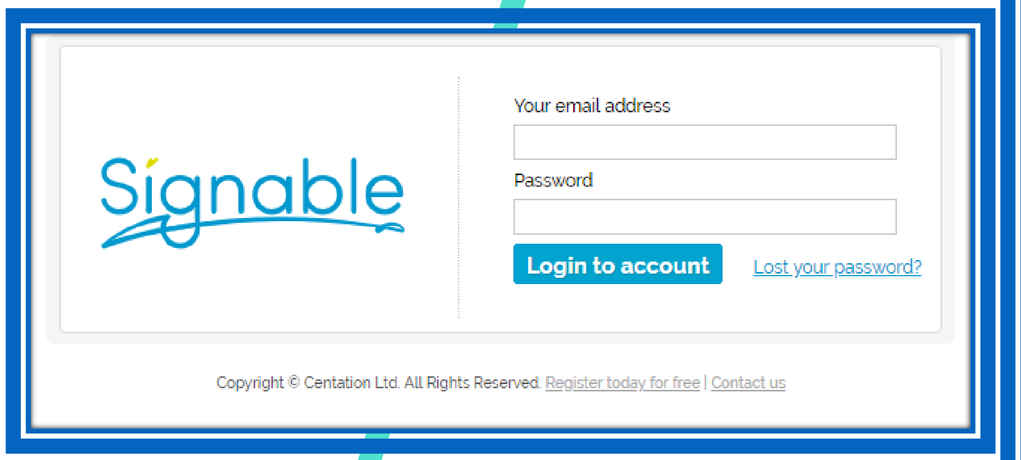
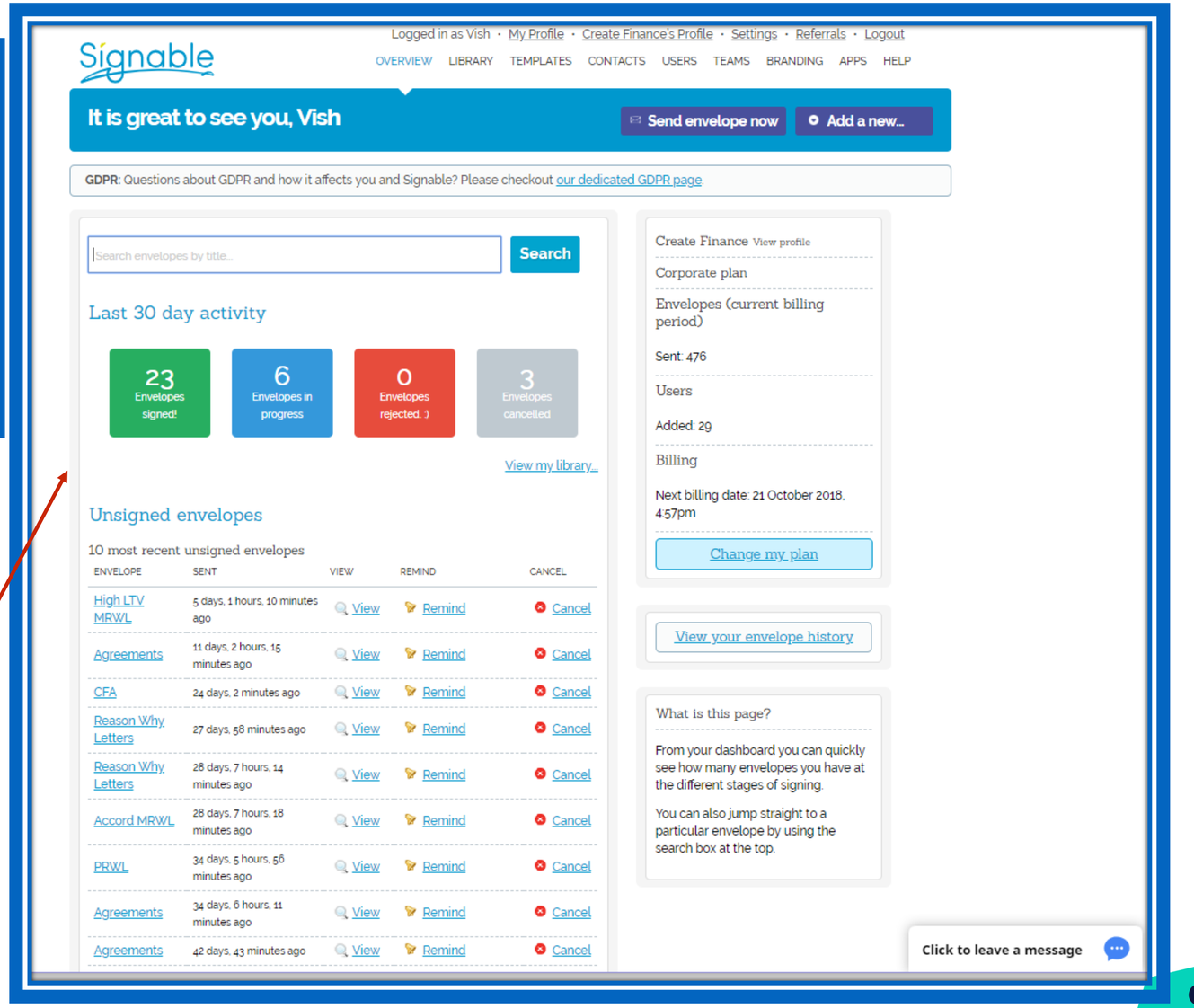
First steps...



Before using signable – You must login, your advisor's logins can be found on the Create Finance login sheet.

After you have logged in this screen should come up.



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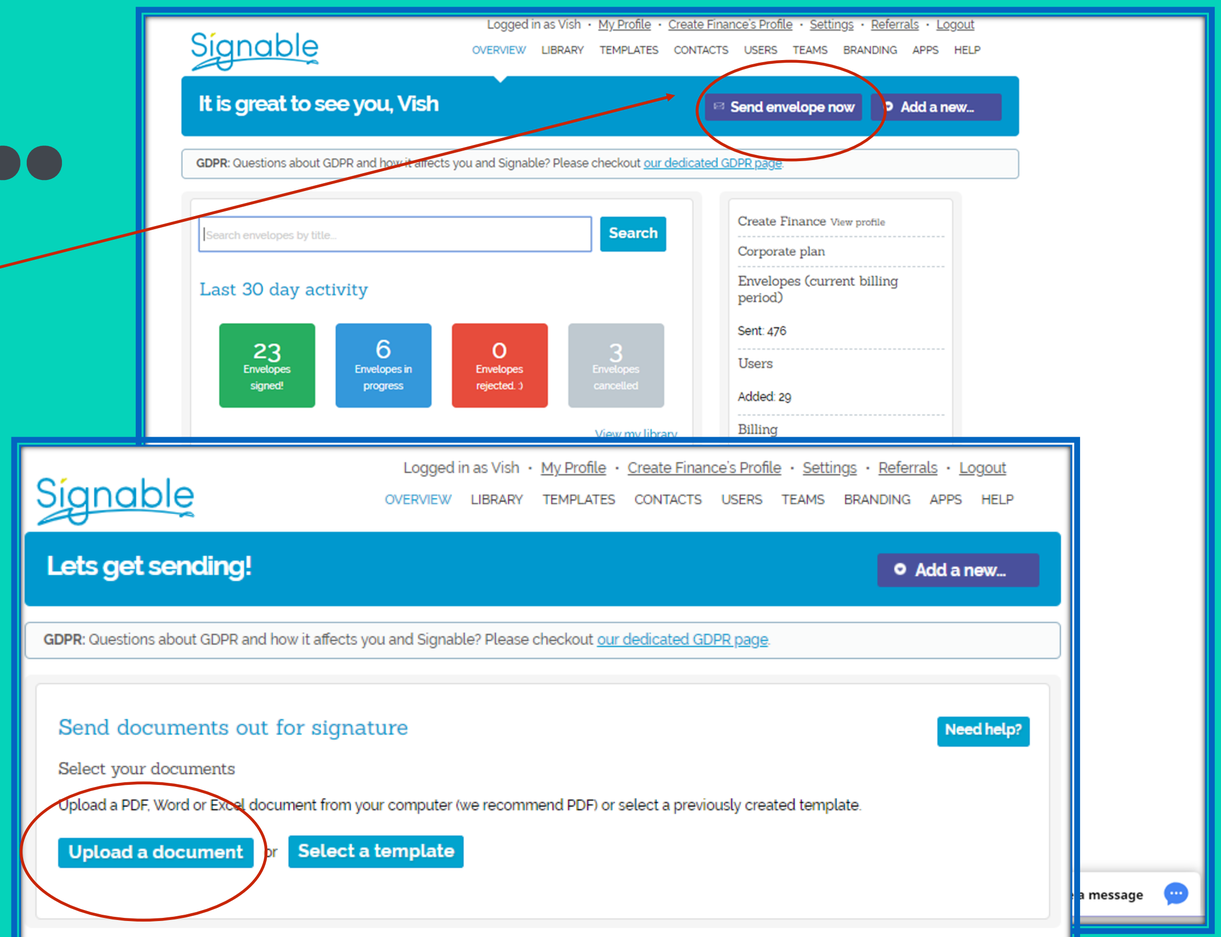
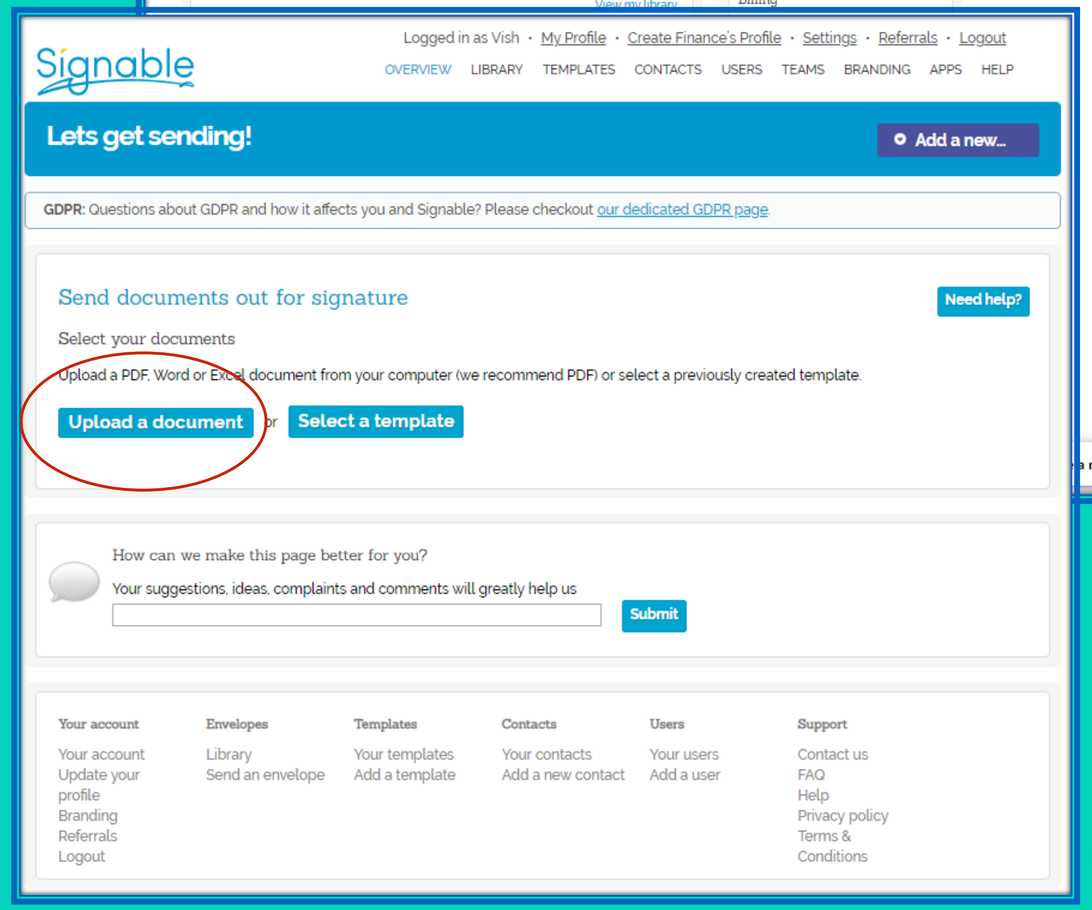
The next steps...

After you have logged in, click on ‘Send Envelope’ The screen below should then show.

When this screen shows click on ‘Upload a document’

Please note that before sending out any agreements, they must first be converted to a PDF document or else signable will not allow you to upload this.





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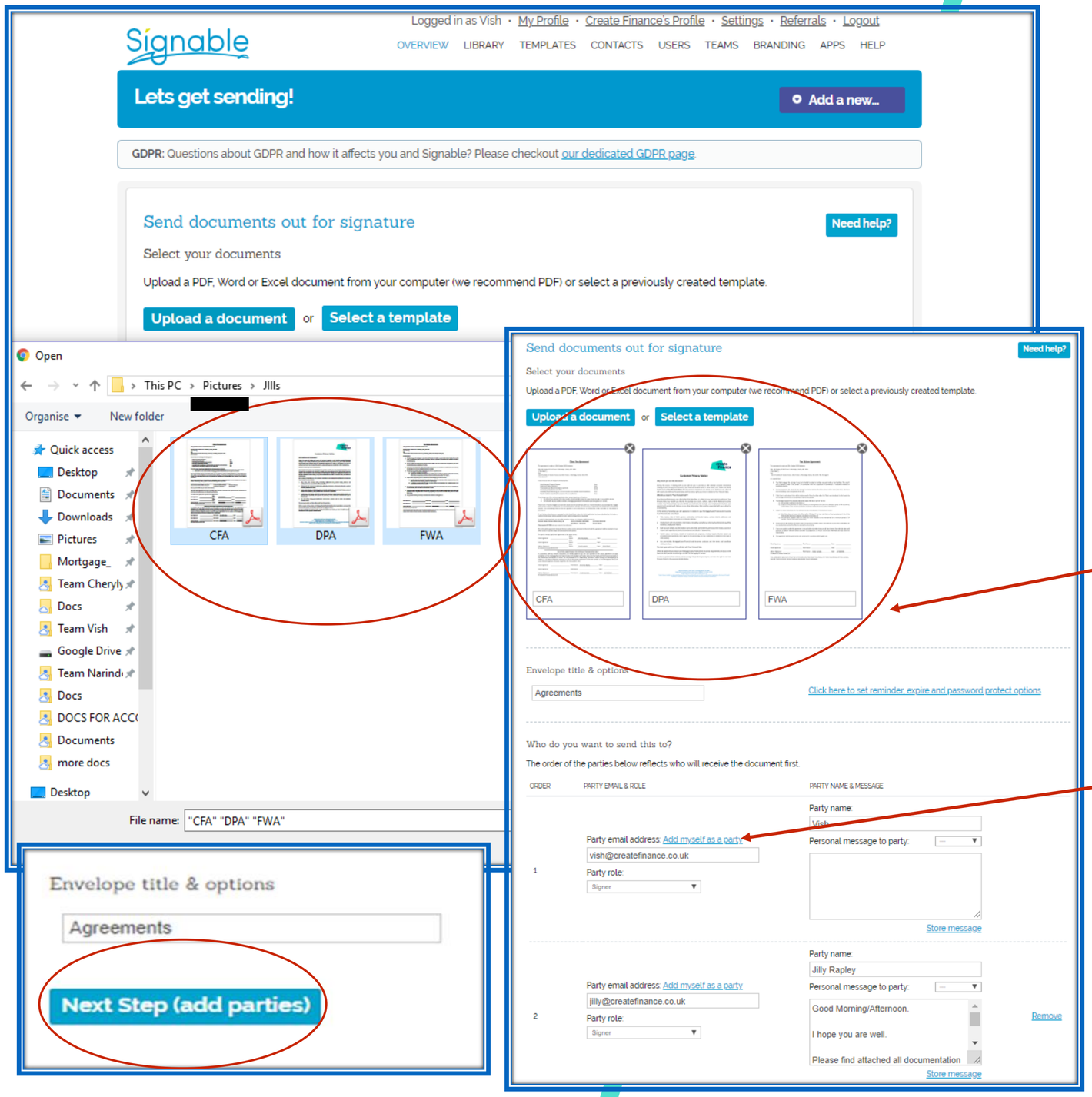


When you have clicked on upload a document. Locate the file where the agreements are saved and select all of them and open.

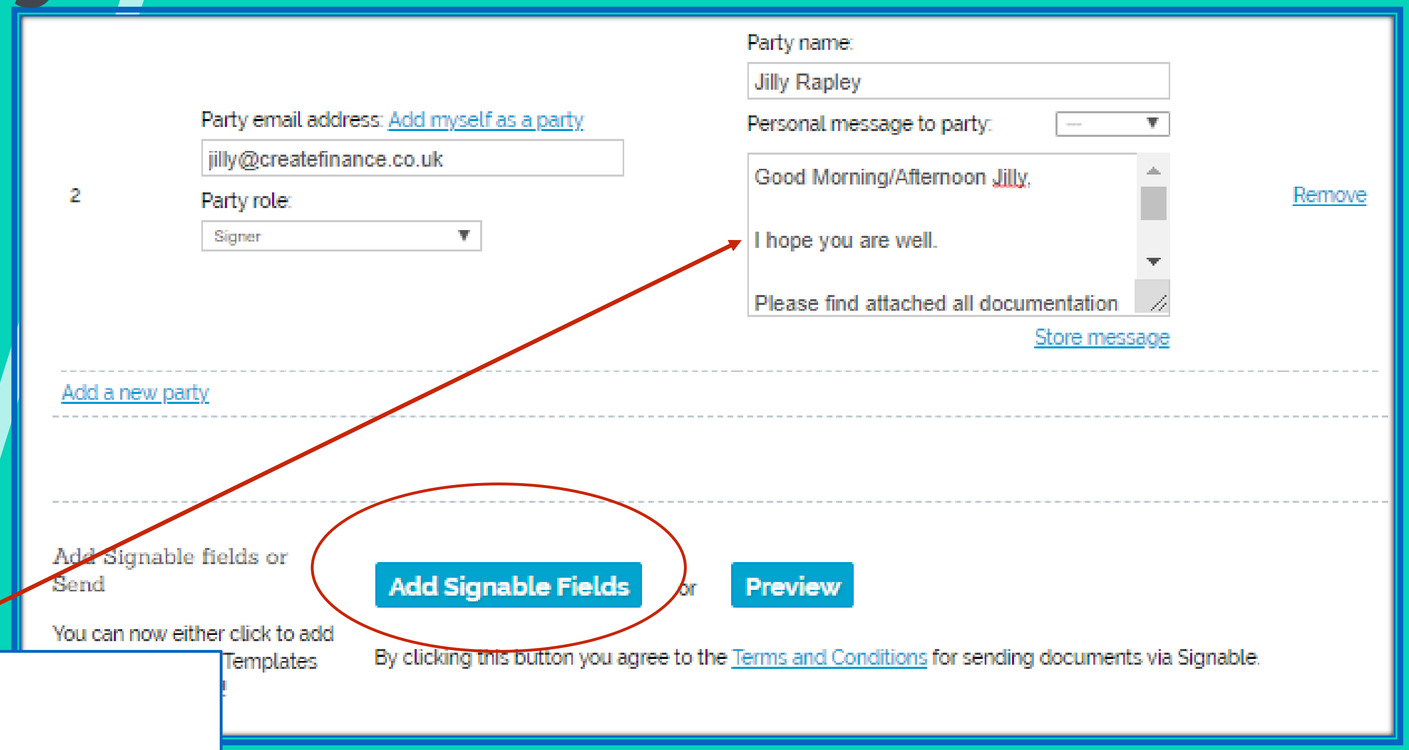
They should then attach to signable. Make sure you edit the title as ‘Agreements’

Then click on Next Step to add your signers!

After this, you need to add parties to sign the agreements. Click ‘ Add myself as a party’ This makes sure the advisor signs the document first

Don’t Forget to add your client!

Make sure you add your client(s)!
Ensure their email and name matches what is on Mortgage Keeper and that you have typed up a message.
Here is a little template we use:



Good Morning/Afternoon …

I hope you are well!

Please find attached all documentation that requires you signature, we would be grateful if you could return this as soon as possible. In respect to the Data Protection & ID Verification document, it is important that the Data Consent box is ticked otherwise we are unable to continue processing your data and any applications.

If you have any questions please let me know.

Kind Regards,

Please note – This template is for when you are sending agreements with the DPA attached.

After you’ve added all parties, click on ‘Add Signable Fields’

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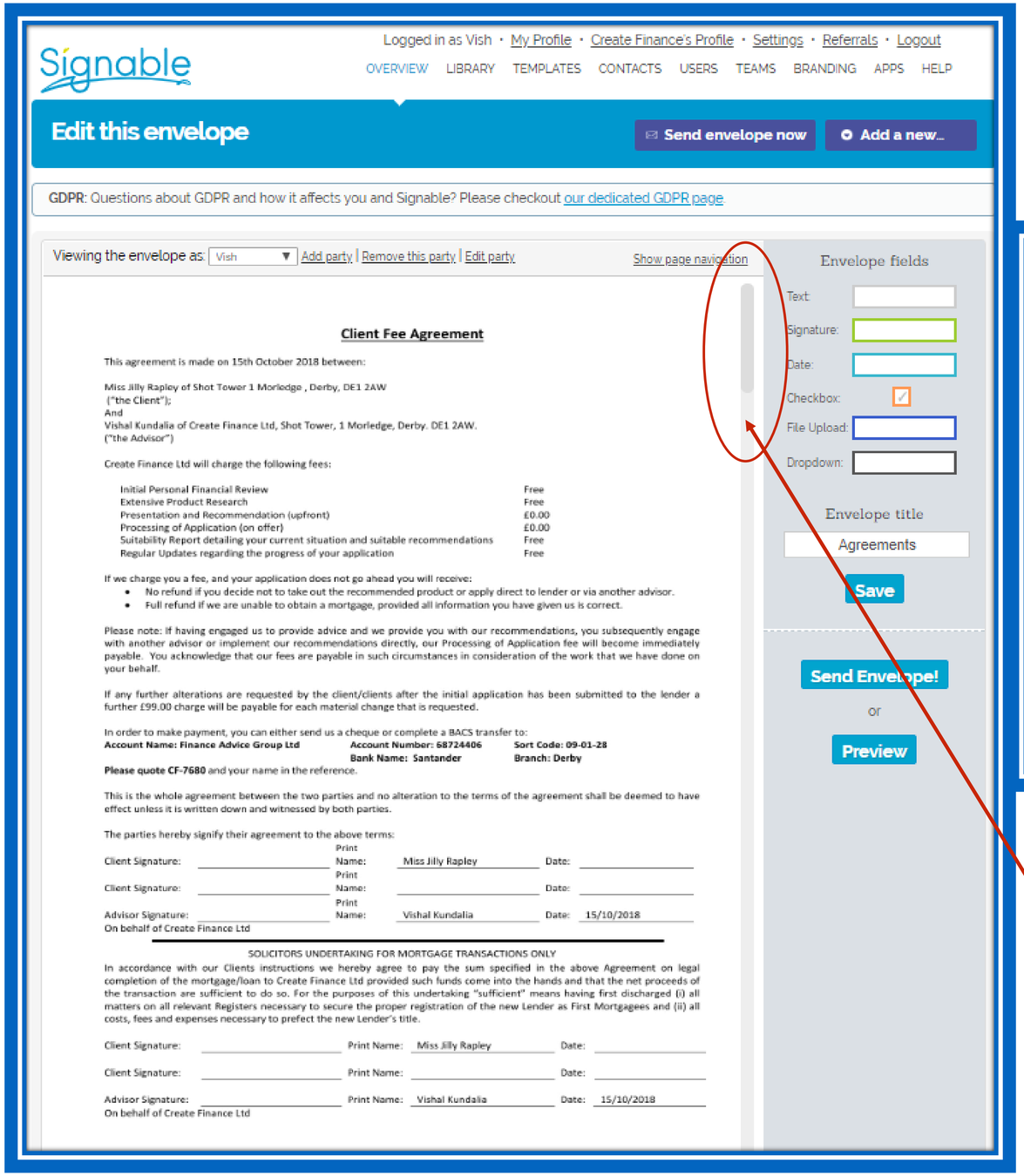
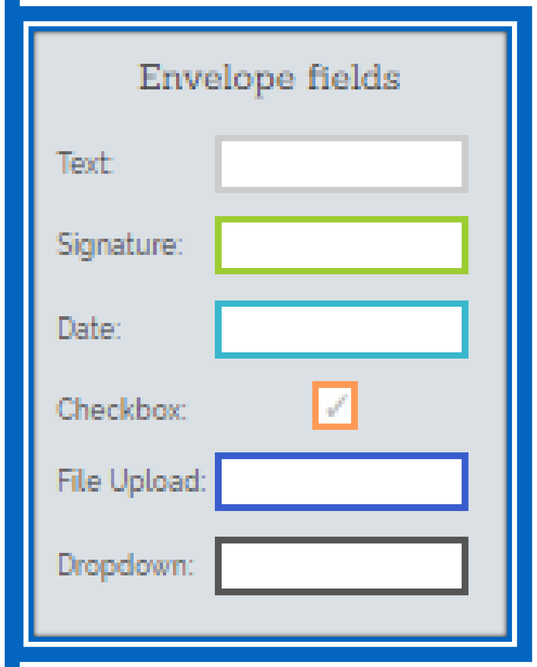


Your screen should now show this. On the right hand side are tools you use to add the required fields which the advisor and your client must complete.



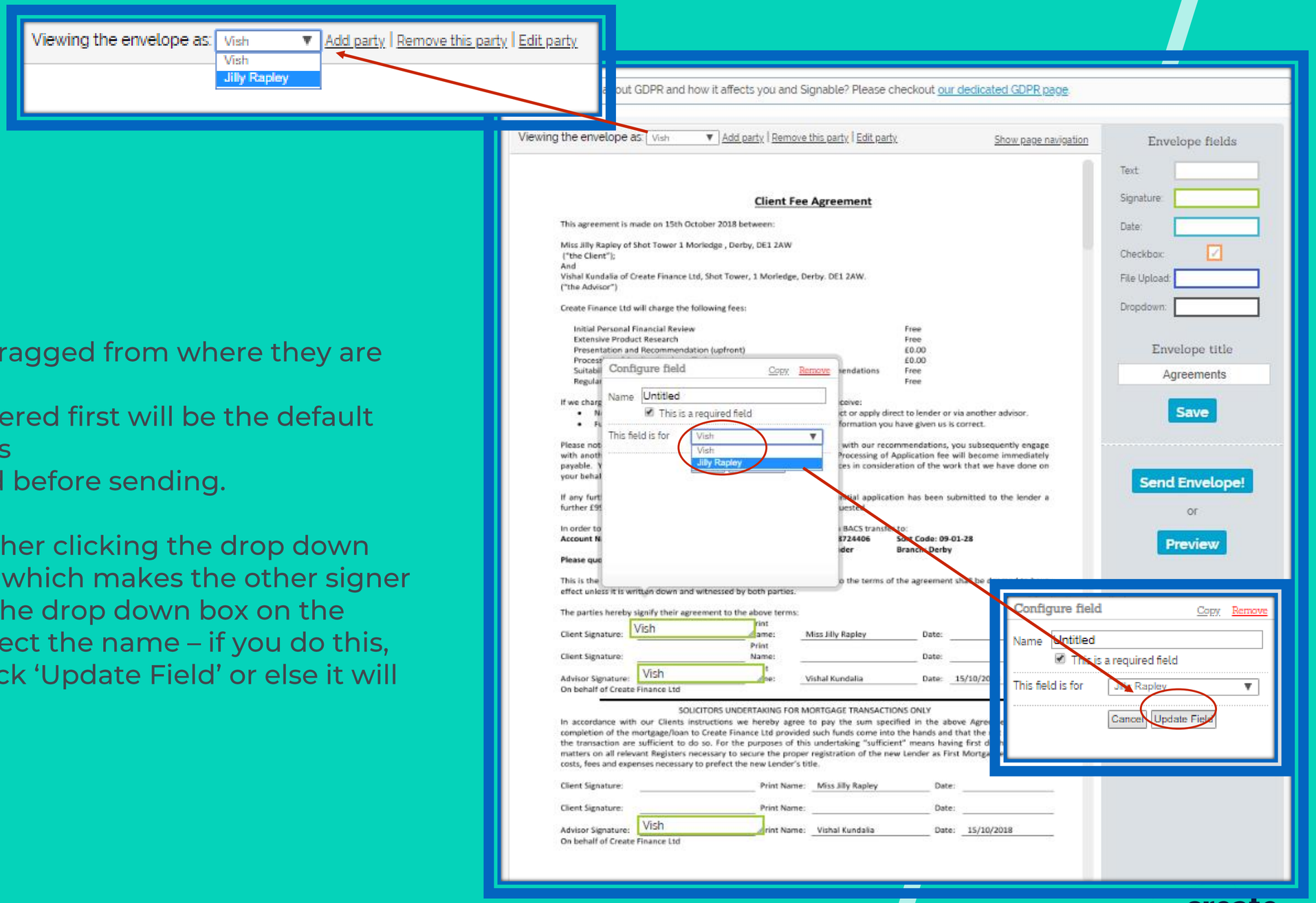
- **Text** – This is used for name, if the client's name does not show on the agreement add the text box so they are able to input their name
- **Signature** – This is for their signature
- **Date** – This is for the date
- **Checkbox** – This is for any Checkboxes that appear on the agreements

We do not use the other two

This little bar will help you scroll up and down

The signing tools can be dragged from where they are onto the agreements.
Which ever signer you entered first will be the default name on the signing boxes
So these must be changed before sending.

You can change this by either clicking the drop down box at the top of the page which makes the other signer the default name or click the drop down box on the actual signing tool and select the name – if you do this, you must remember to click ‘Update Field’ or else it will not change



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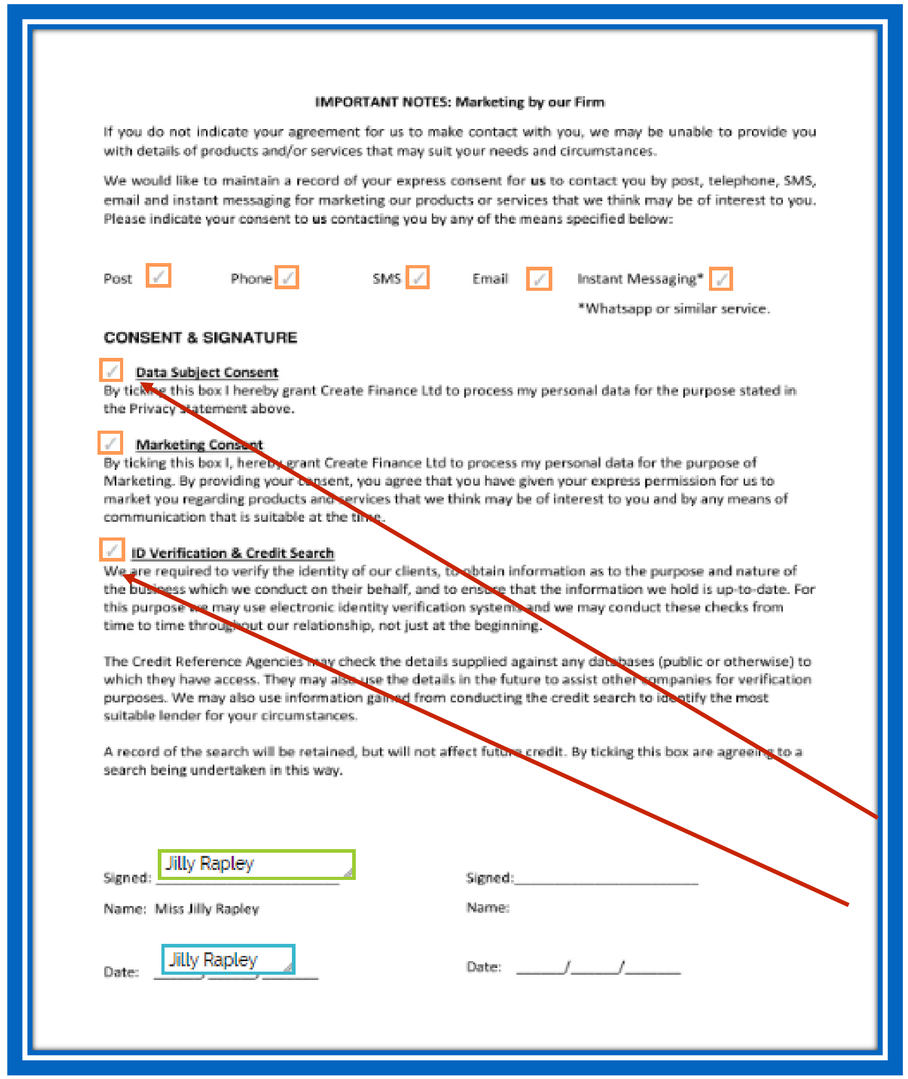
What should your DPA signable document look like?



IMPORTANT NOTES: Marketing by our Firm

If you do not indicate your agreement for us to make contact with you, we may be unable to provide you with details of products and/or services that may suit your needs and circumstances.

We would like to maintain a record of your express consent for **us** to contact you by post, telephone, SMS, email and instant messaging for marketing our products or services that we think may be of interest to you. Please indicate your consent to **us** contacting you by any of the means specified below:

Post ☑ Phone ☑ SMS ☑ Email ☑ Instant Messaging* ☑

*Whatsapp or similar service.

CONSENT & SIGNATURE

☑ **Data Subject Consent**
By ticking this box I hereby grant Create Finance Ltd to process my personal data for the purpose stated in the Privacy Statement above.

☑ **Marketing Consent**
By ticking this box I, hereby grant Create Finance Ltd to process my personal data for the purpose of Marketing. By providing your consent, you agree that you have given your express permission for us to market you regarding products and services that we think may be of interest to you and by any means of communication that is suitable at the time.

☑ **ID Verification & Credit Search**
We are required to verify the identity of our clients, to obtain information as to the purpose and nature of the business which we conduct on their behalf, and to ensure that the information we hold is up-to-date. For this purpose we may use electronic identity verification systems and we may conduct these checks from time to time throughout our relationship, not just at the beginning.

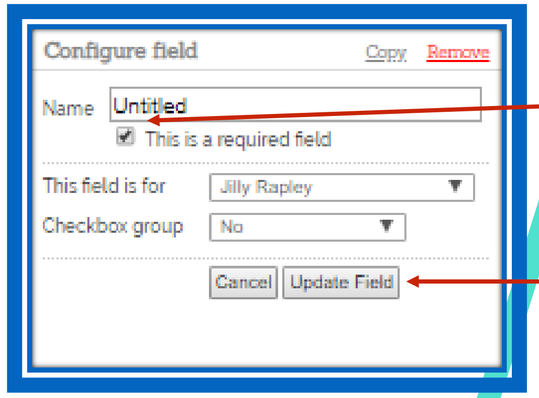
The Credit Reference Agencies may check the details supplied against any databases (public or otherwise) to which they have access. They may also use the details in the future to assist other companies for verification purposes. We may also use information gained from conducting the credit search to identify the most suitable lender for your circumstances.

A record of the search will be retained, but will not affect future credit. By ticking this box are agreeing to a search being undertaken in this way.

Signed: Jilly Rapley _____ Signed: _____

Name: Miss Jilly Rapley Name:

Date: Jilly Rapley _____ Date: _____/_____/_____



To change required fields click on your signing
tool and untick the required field or tick it.
Again remember to update the field

This is the page where clients sign and this is what it must look like.
All the fields on the document must be filled in with the tick boxes however most of them are not required.

The only fields that require signing are ‘ID Verification & Credit Search’ and ‘Data Subject Consent’

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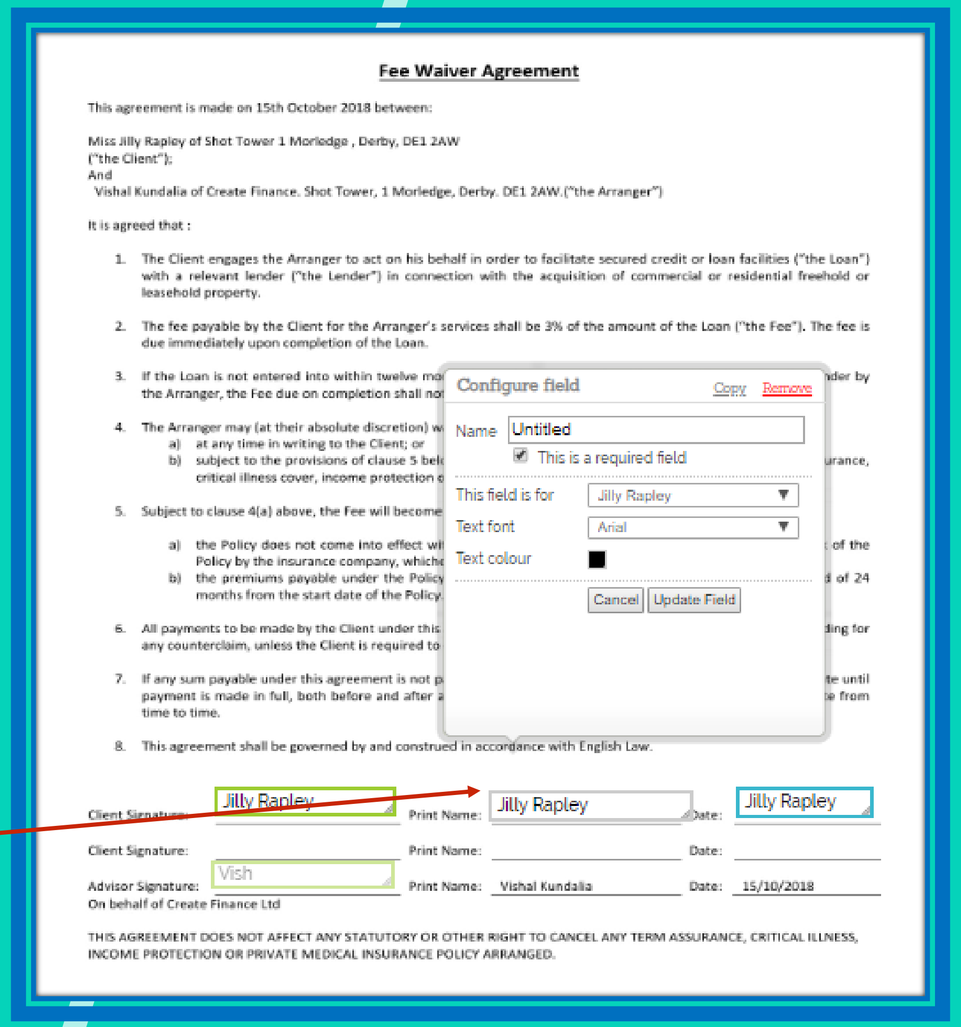
How the text box is used and what next

An example of when the text box would be used is on the Fee Waiver Agreement.

On some documents
the client's name may not pull through so it is important the text box is added in on their 'Print Name'

After all the signing fields have been added click 'Send Envelope!' on the right hand side to send your agreements!



Fee Waiver Agreement

This agreement is made on 15th October 2018 between:

Miss Jilly Rapley of Shot Tower 1 Morledge , Derby, DE1 2AW
("the Client");
And
Vishal Kundalia of Create Finance. Shot Tower, 1 Morledge, Derby. DE1 2AW.("the Arranger")

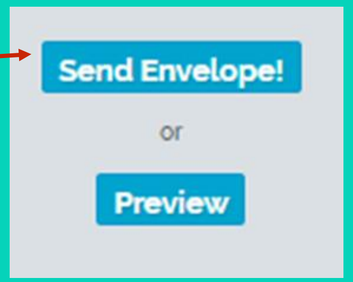
It is agreed that :

1. The Client engages the Arranger to act on his behalf in order to facilitate secured credit or loan facilities ("the Loan") with a relevant lender ("the Lender") in connection with the acquisition of commercial or residential freehold or leasehold property.
2. The fee payable by the Client for the Arranger's services shall be 3% of the amount of the Loan ("the Fee"). The fee is due immediately upon completion of the Loan.
3. If the Loan is not entered into within twelve mo… …der by the Arranger, the Fee due on completion shall no…
4. The Arranger may (at their absolute discretion) w…
   a) at any time in writing to the Client; or
   b) subject to the provisions of clause 5 bel… …urance, critical illness cover, income protection …
5. Subject to clause 4(a) above, the Fee will become…
   a) the Policy does not come into effect wi… … of the Policy by the insurance company, whiche…
   b) the premiums payable under the Policy … … of 24 months from the start date of the Policy
6. All payments to be made by the Client under this… …ding for any counterclaim, unless the Client is required to…
7. If any sum payable under this agreement is not p… …te until payment is made in full, both before and after … …e from time to time.
8. This agreement shall be governed by and construed in accordance with English Law.

Configure field — Copy — Remove
Name: Untitled
This is a required field
This field is for: Jilly Rapley
Text font: Arial
Text colour:
Cancel | Update Field

Client Signature: Jilly Rapley Print Name: Jilly Rapley Date: Jilly Rapley
Client Signature: Print Name: Date:
Advisor Signature: Vish Print Name: Vishal Kundalia Date: 15/10/2018
On behalf of Create Finance Ltd

THIS AGREEMENT DOES NOT AFFECT ANY STATUTORY OR OTHER RIGHT TO CANCEL ANY TERM ASSURANCE, CRITICAL ILLNESS, INCOME PROTECTION OR PRIVATE MEDICAL INSURANCE POLICY ARRANGED.



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How to Sign Agreements

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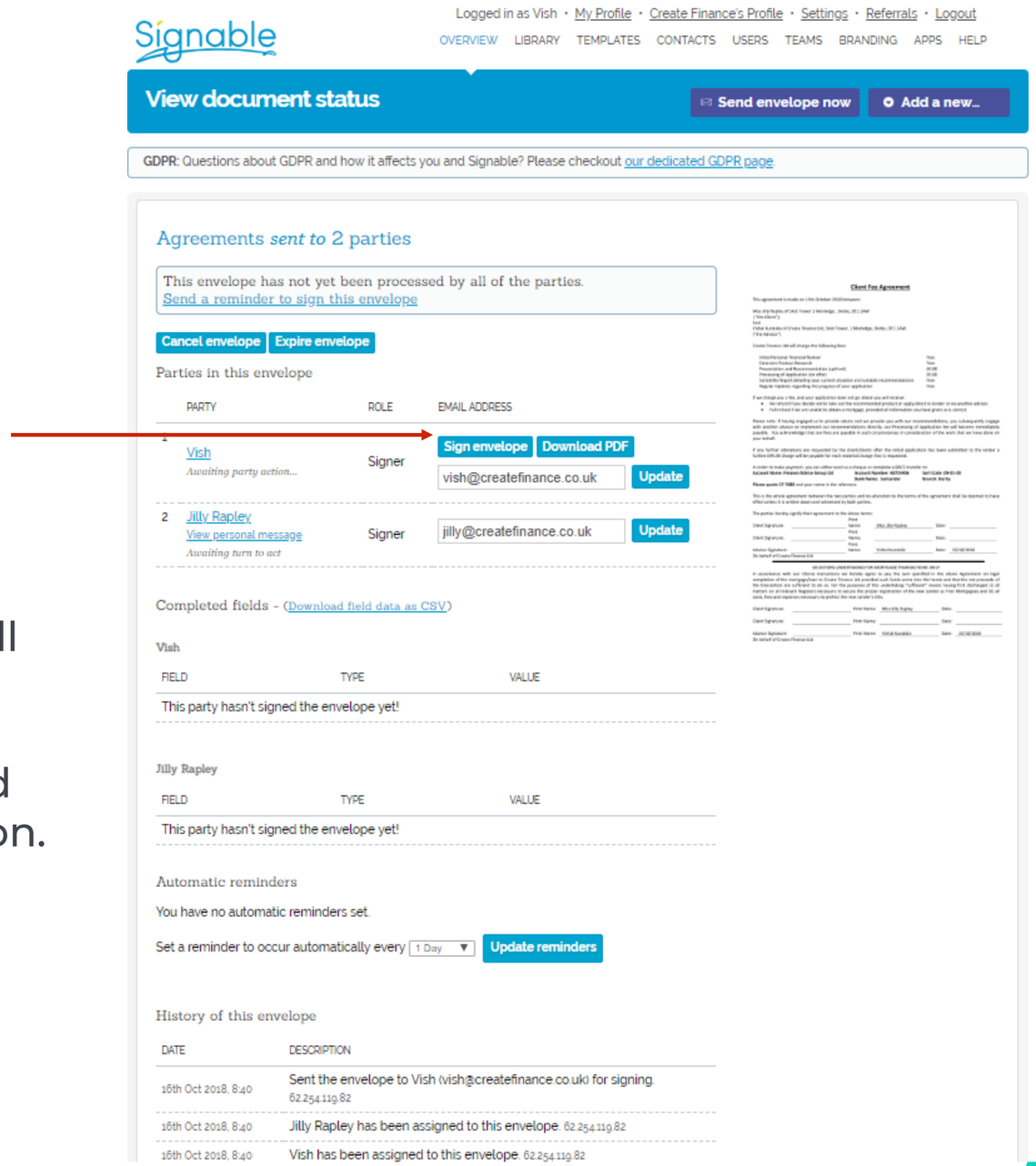
How it will look to you

This is how your screen will look after you
Have sent the agreements. If you have put
The advisor as the first signer then they will have
to sign first. Signable works in signing order.
Who ever you have inserted first and last they will
Sign in the order you have set.

No one can sign unless the first signer has signed
The document and the one before them and so on.

So, click ‘Sign Envelope’ to begin!



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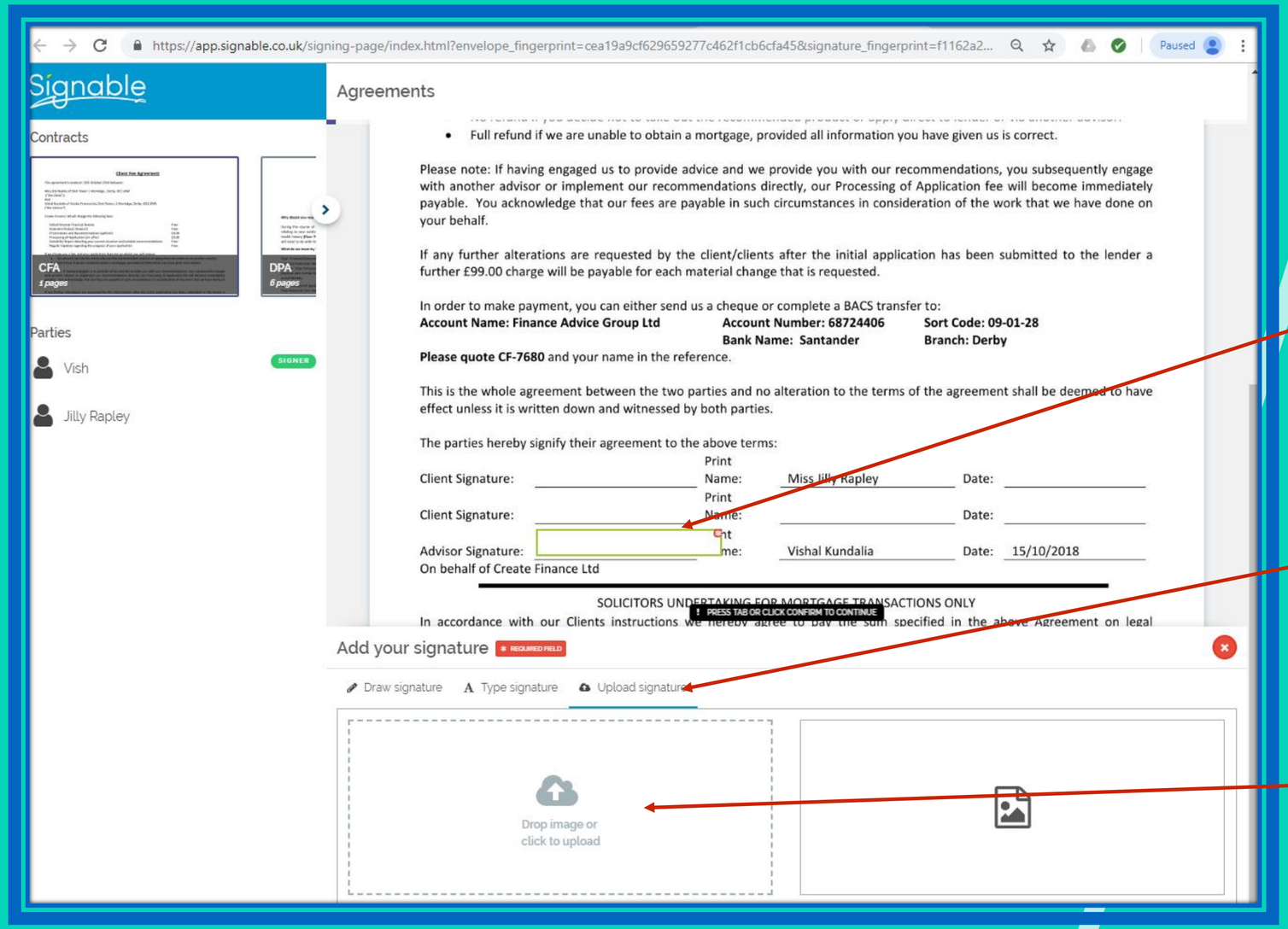
What happens next...



Your screen should now look like this. Click on the required field Which is the green box, a bar below Should appear.

Click ‘Upload Signature’

And then ‘Drop image or click to upload’

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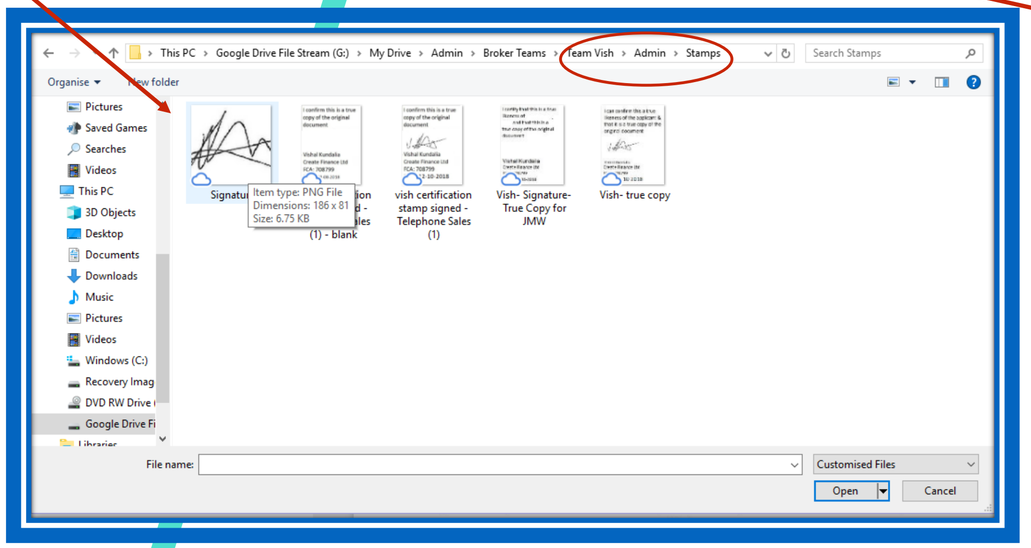
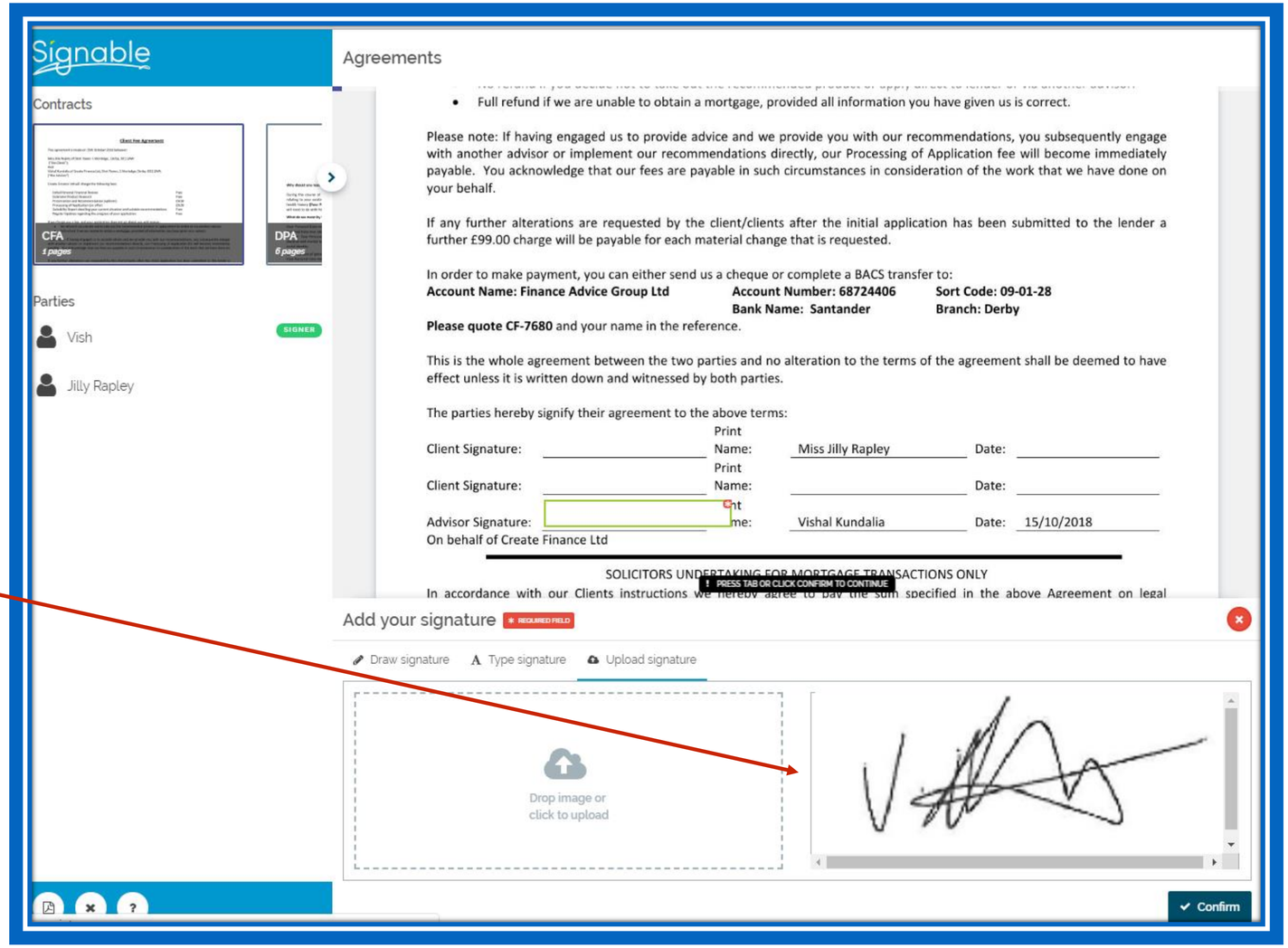
How to upload your signature

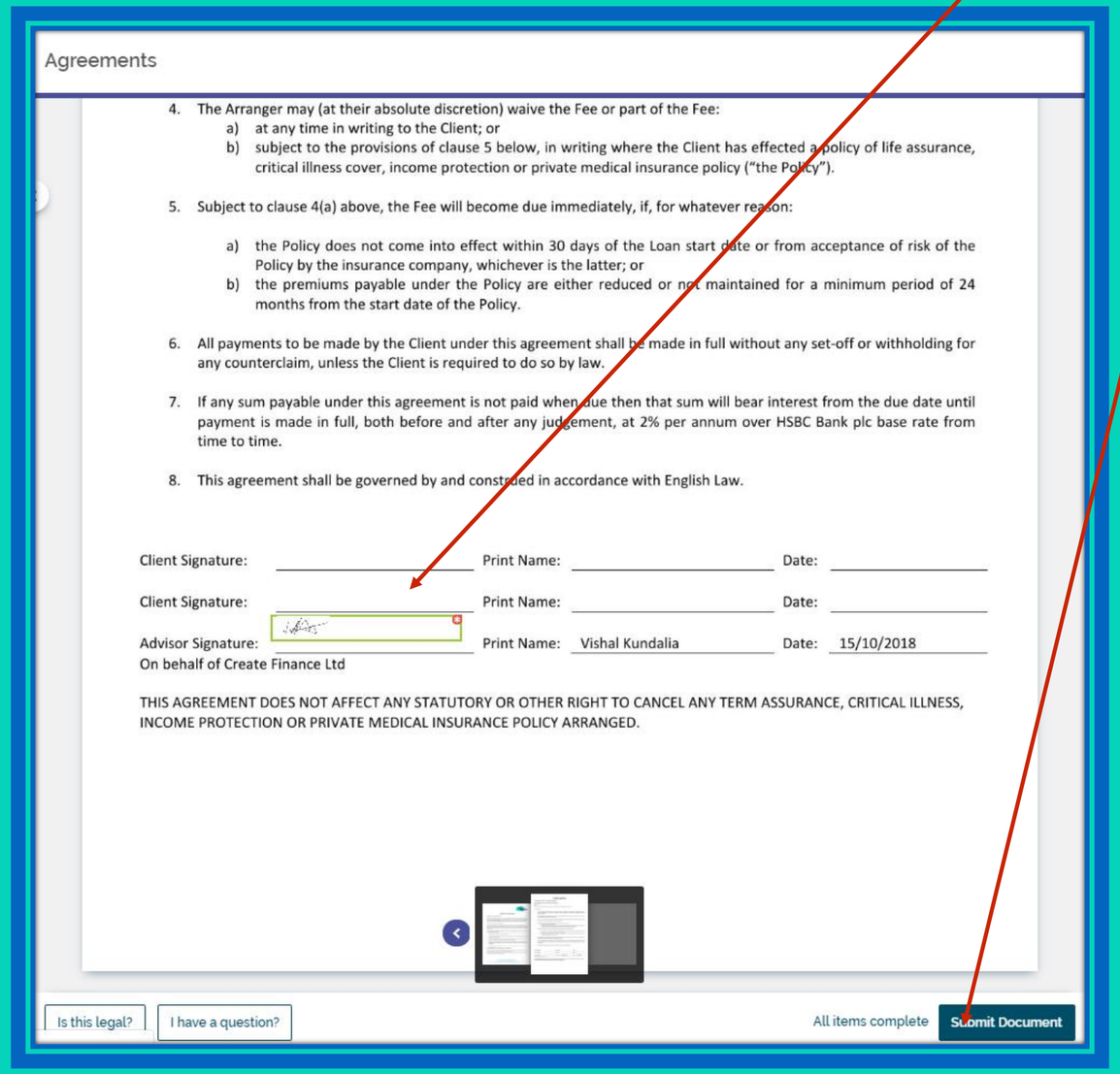
Go into your team folder for example I would go to ‘Team Vish’ next go to the Admin folder and Stamps. There you should find a broker’s digitalised signature.

Click on the PDF document and open. Once it has been uploaded to the box on screen click confirm.





Finally



The signature should show like this.

After this click on Next document on the bottom right corner until all signatures have been uploaded.

Then click ‘Submit Document’

Your screen should now show like this, this means you have completed your fields and it’s been sent to the client to complete.

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How do I sign my Signable?

This is a guide created just for you!
We understand it can be tricky to use new softwares, with all this technology it’s hard to keep up!
You don’t have to worry though, just follow this guide and you’ll be able to sign agreements.
Create Finance to the rescue!

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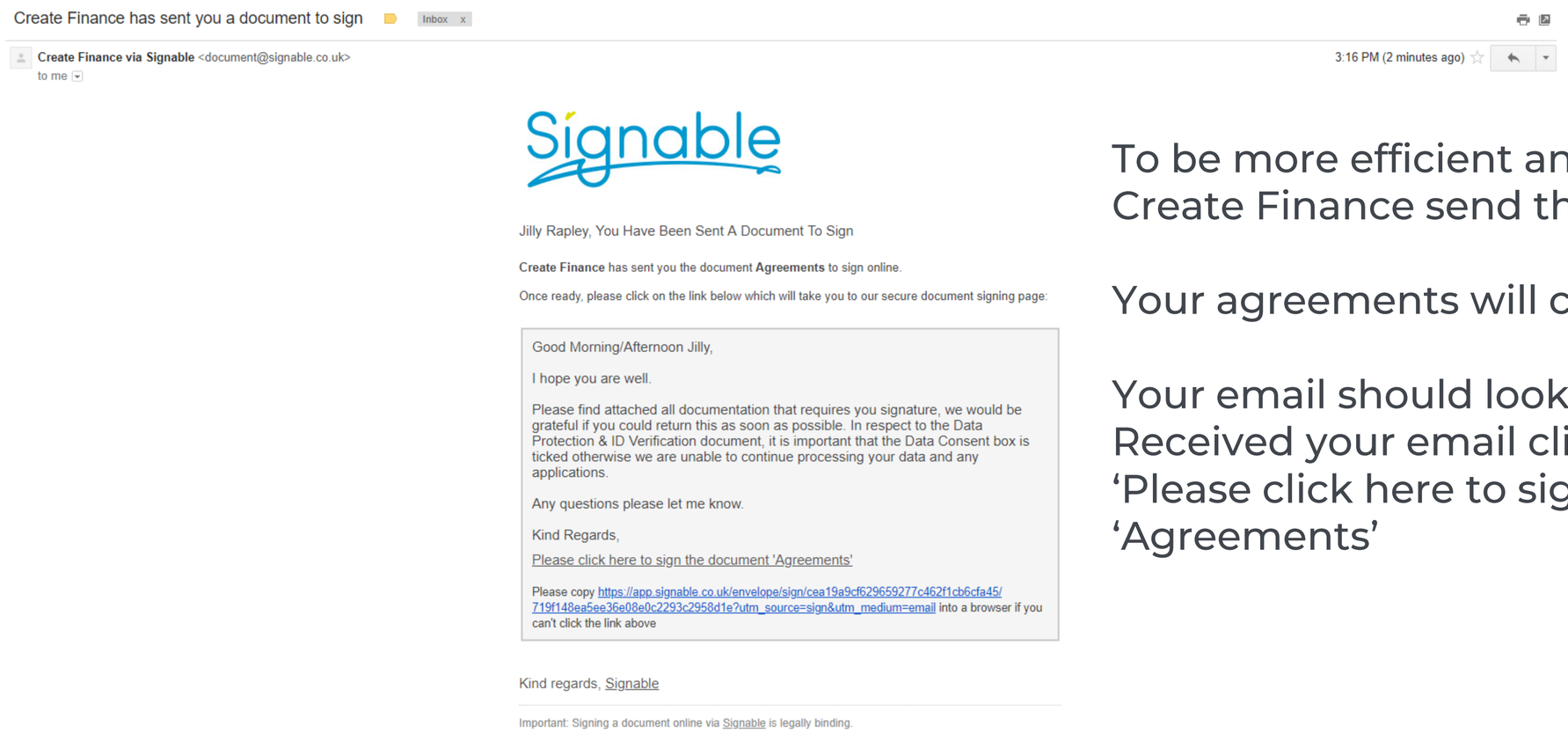
How will I receive my agreements?



Create Finance has sent you a document to sign

Inbox x

Create Finance via Signable <document@signable.co.uk>
to me

3:16 PM (2 minutes ago)

Signable

Jilly Rapley, You Have Been Sent A Document To Sign

Create Finance has sent you the document **Agreements** to sign online.

Once ready, please click on the link below which will take you to our secure document signing page:

Good Morning/Afternoon Jilly,

I hope you are well.

Please find attached all documentation that requires you signature, we would be grateful if you could return this as soon as possible. In respect to the Data Protection & ID Verification document, it is important that the Data Consent box is ticked otherwise we are unable to continue processing your data and any applications.

Any questions please let me know.

Kind Regards,

Please click here to sign the document 'Agreements'

Please copy https://app.signable.co.uk/envelope/sign/cea19a9cf629659277c462f1cb6cfa45/719f148ea5ee36e08e0c2293c2958d1e?utm_source=sign&utm_medium=email into a browser if you can't click the link above

Kind regards, Signable

Important: Signing a document online via Signable is legally binding.

To be more efficient and environmental friendly Create Finance send their agreements digitally.

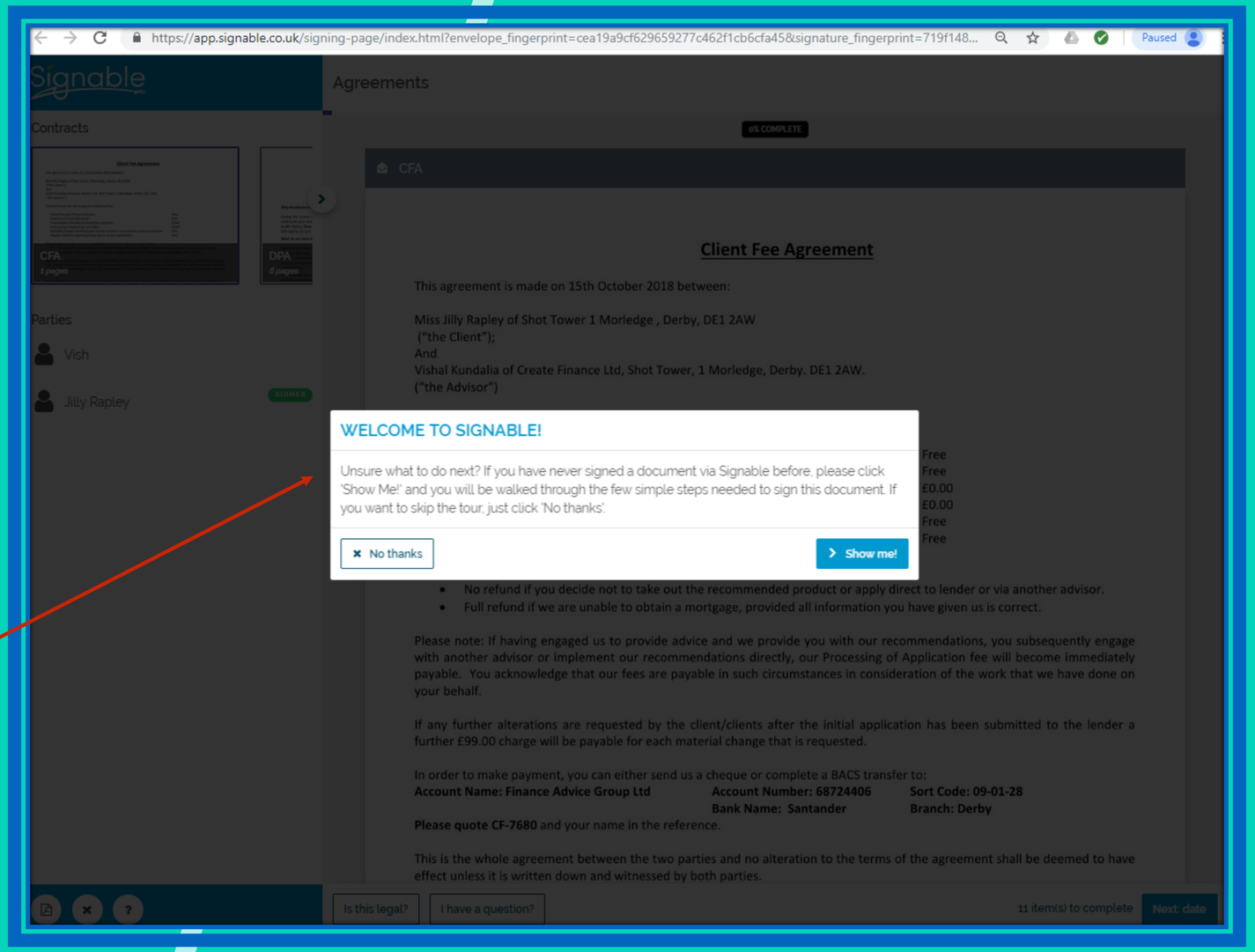
Your agreements will come through as an email.

Your email should look like this. Once you have Received your email click
'Please click here to sign the document 'Agreements'

Now What?

After you click on that link a new tab should automatically appear on your screen which looks like this.

You have two options. You can either click ‘Show Me!’ This will show you how to use signable, but with this amazing guide created for you why would you do that? Click No thanks instead!



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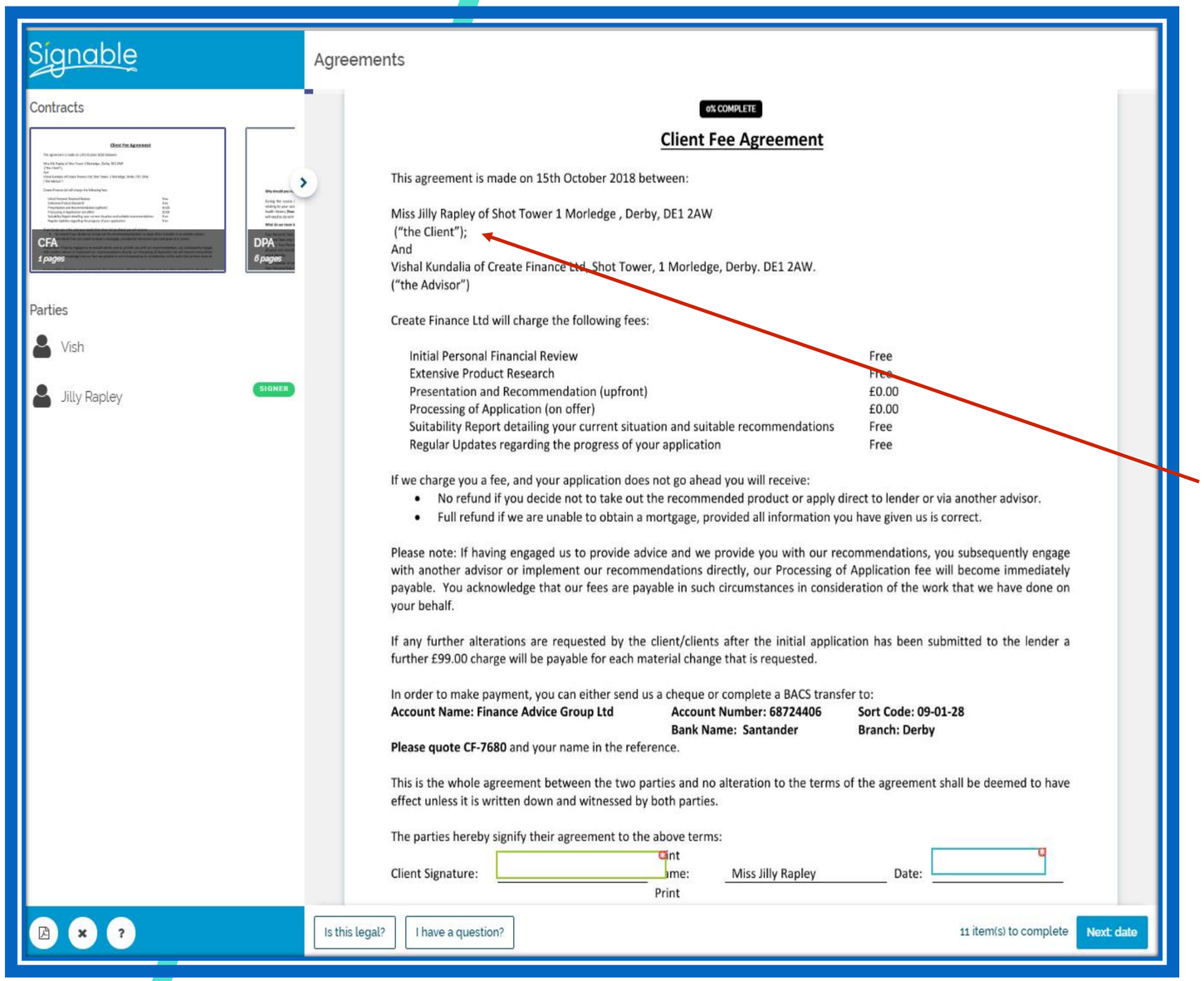
How your agreements should look



Your agreement should look like this.

It is important that you ensure your personal details on your agreements are correct.

All agreements should show your full name including your middle name and your full address.

If you have a joint application and live at two separate addresses, both your addresses should show.

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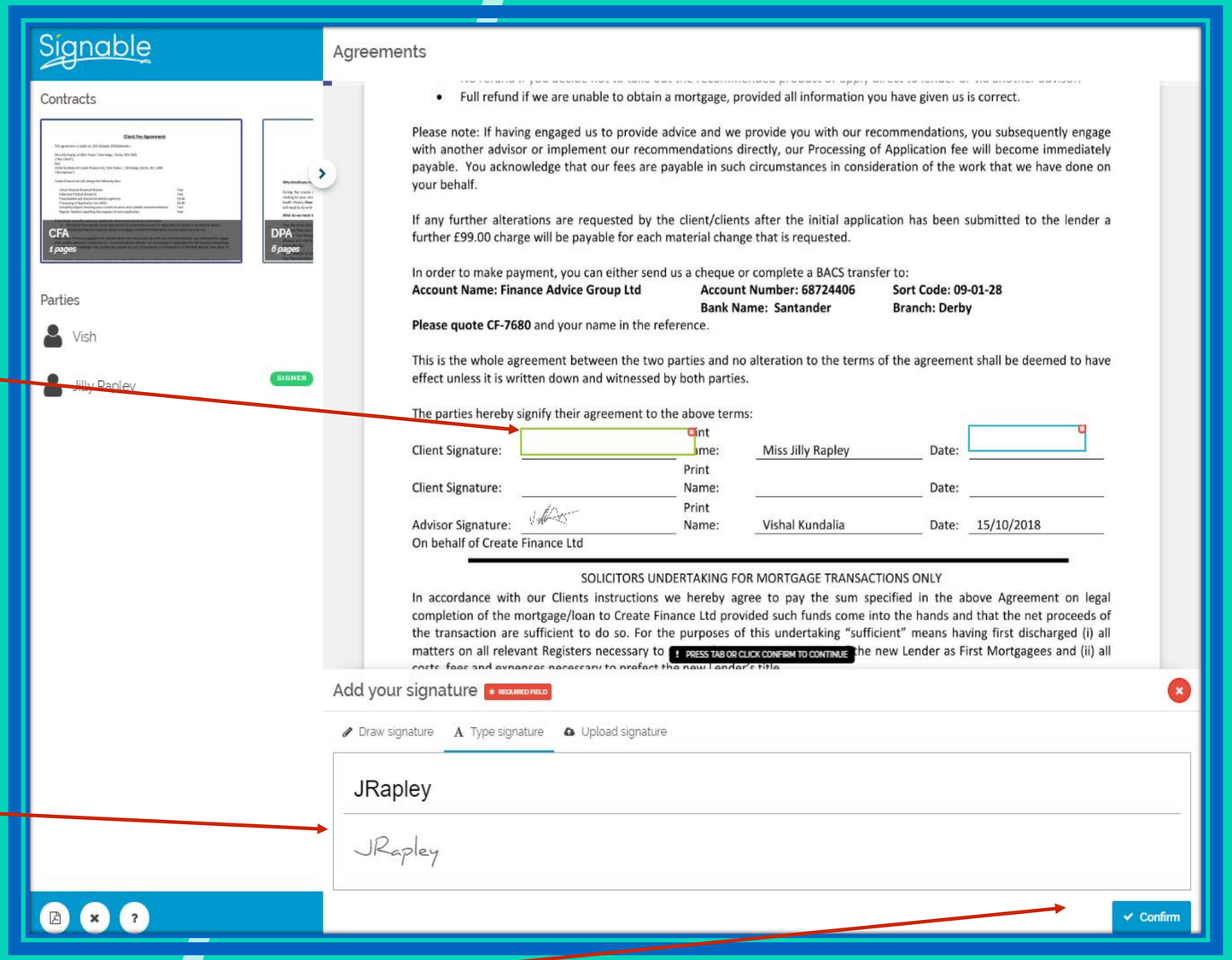
First Steps...

The boxes shown on your agreements are fields which must be completed by yourself.
To complete these click on each one.
When you click on the green box next to ‘Client Signature’ a bar at the bottom should appear.

In this box you have options to Draw, Type or Upload your signature.

The easiest thing would be to Type your signature. When you do this it will generate one for you.

Once you have completed your signature, just click ‘Confirm’ found in the bottom right corner.



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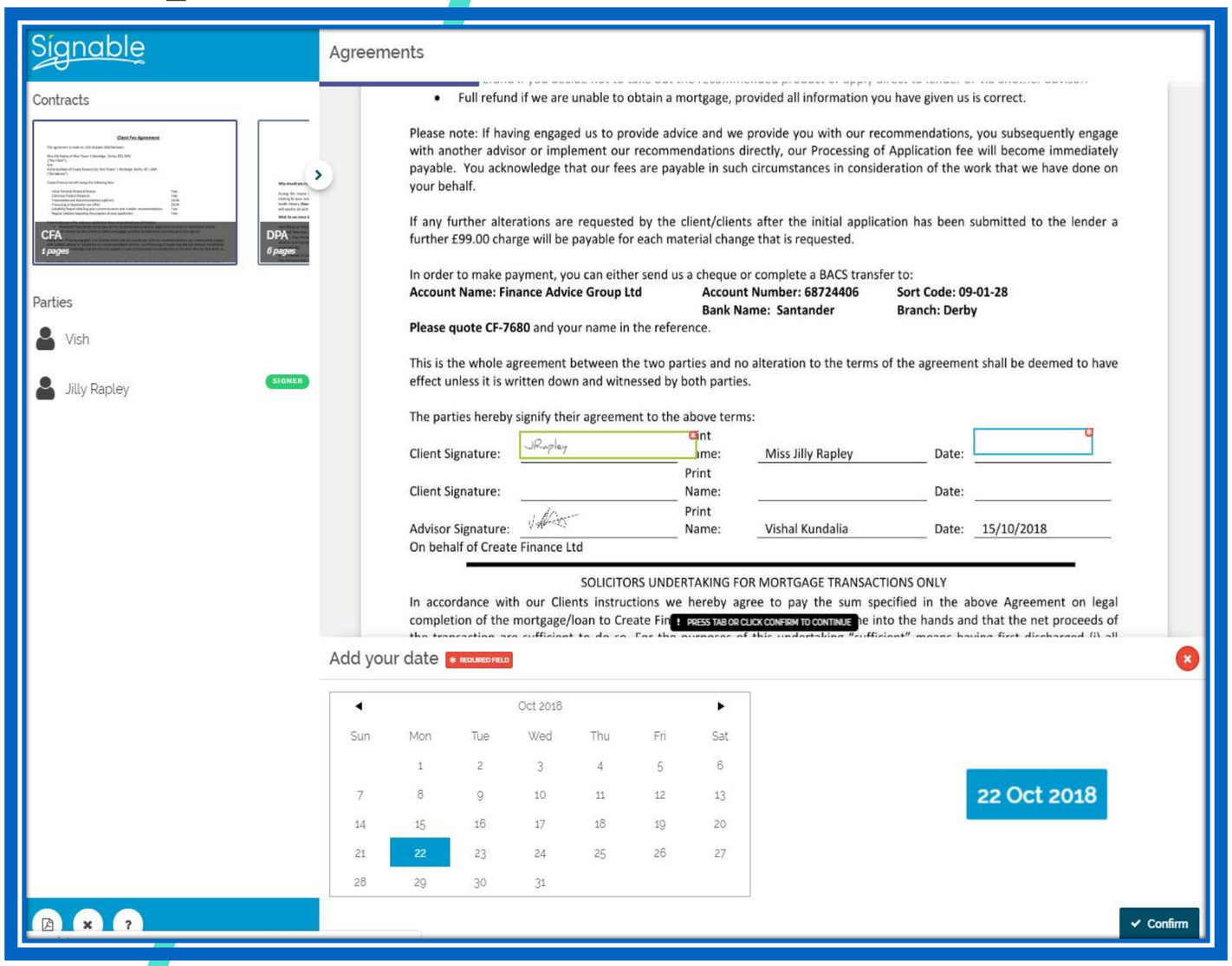
Filling out your required fields



Your signature should upload once you click confirm.

After this you must fill out which day you signed your agreements.
Click on the blue box next to ‘Date:’ again, a bar should appear at the bottom of the page.

This will show as a calendar instead, locate the current date and select it, the date should then show next to the calendar, once this happens click ‘Confirm’

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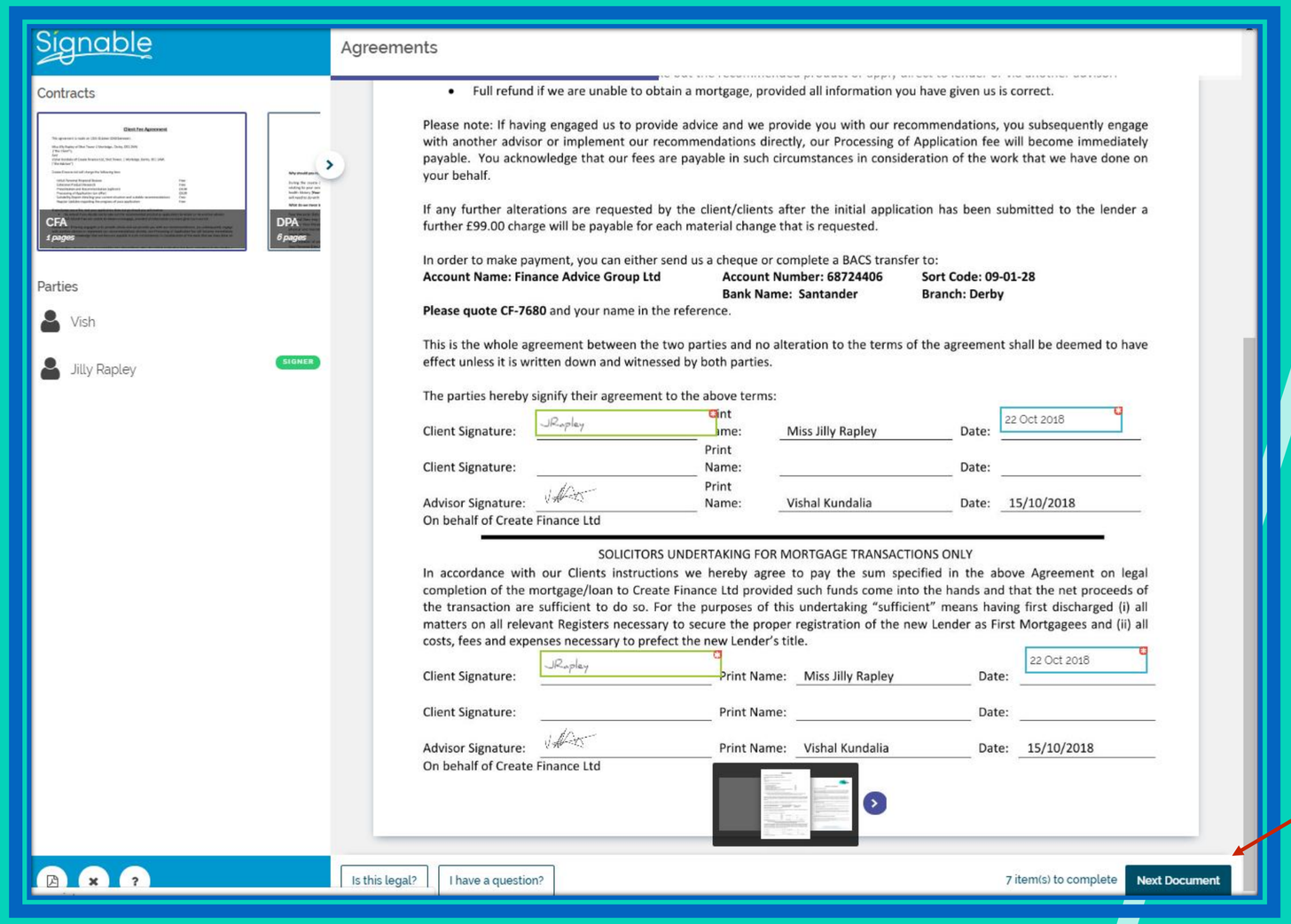
How should my agreement look like now?



After you have completed the required fields for your agreement it should look like this.

Now click on 'Next Document' to sign your other agreements!

Please note without completing all required fields you will not be able to proceed.

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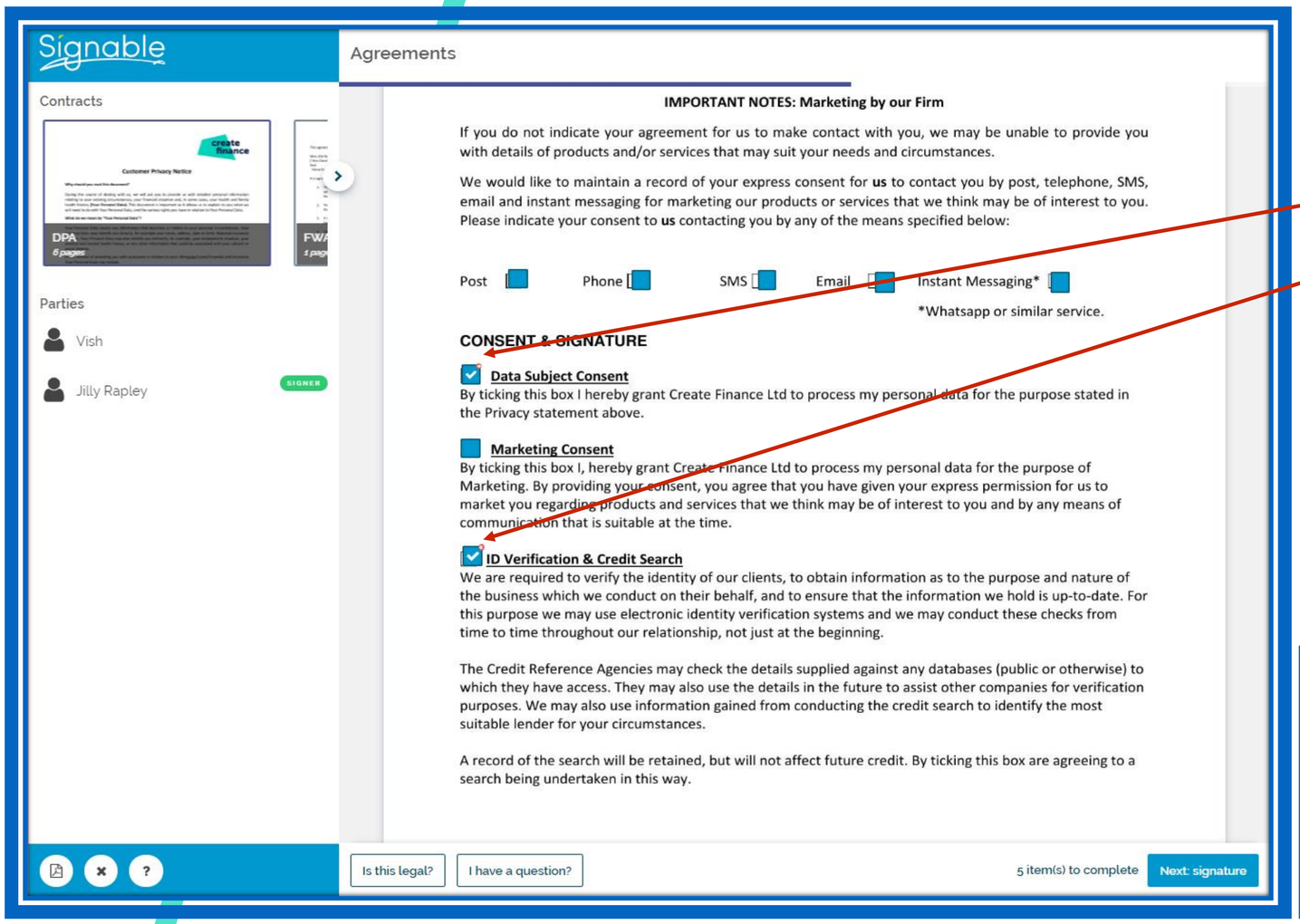
My DPA Agreement

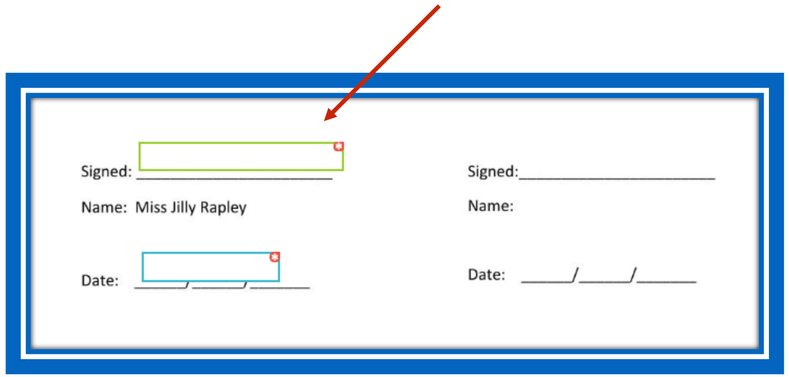
Your DPA agreement confirms how Create Finance will use your personal information.

Without signing this document and the required fields your application will not proceed any further.

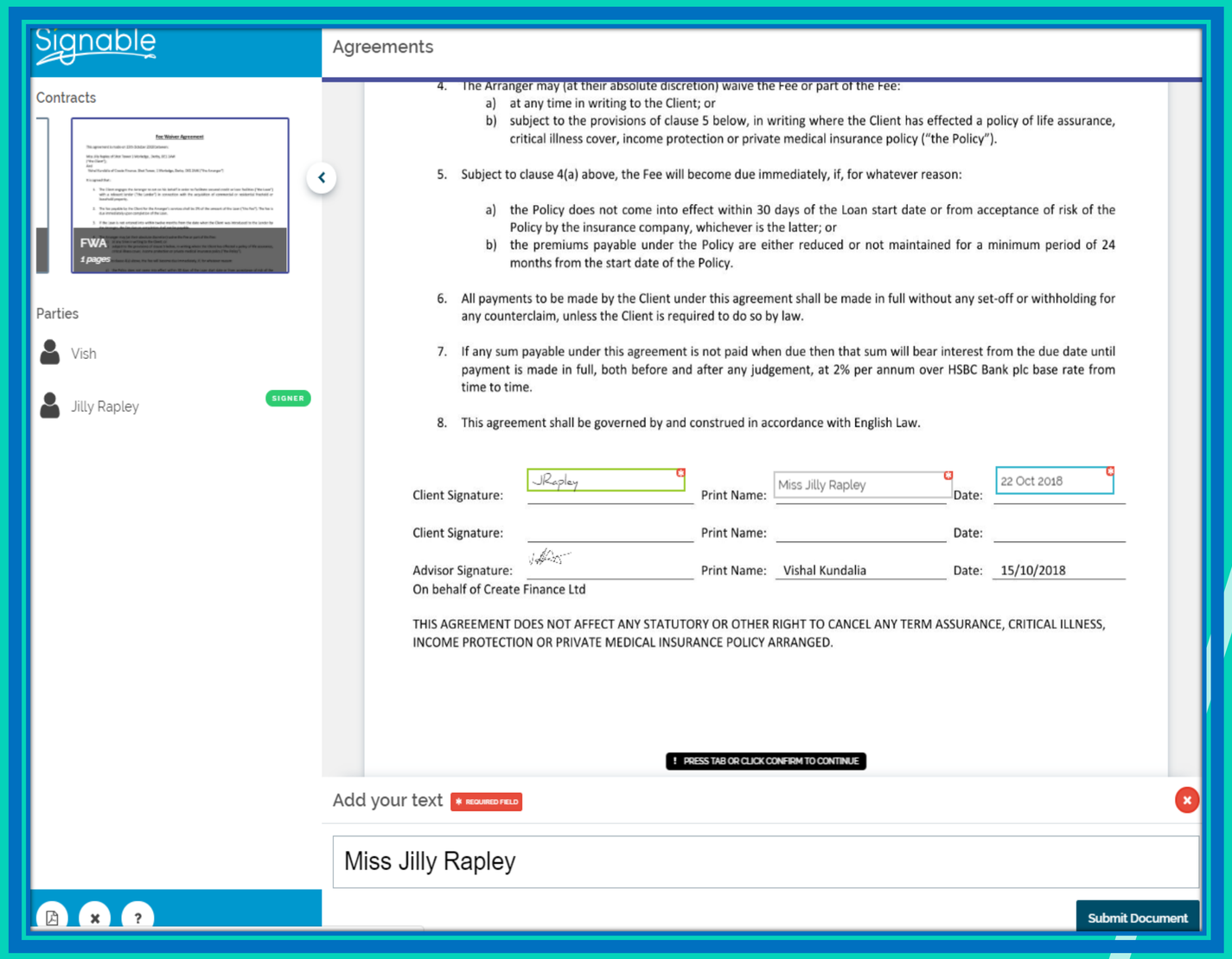


The required field have a red asterix next to the box. Simply click the required boxes and tick them, the other boxes are not required however you can still tick them if you wish.

Below will show more fields which you completed previously.



Fee Waiver Agreement



A Fee Waiver Agreement is sent out when you are taking protection as well as completing your mortgage with Create Finance.

Your name must be typed in – Like the other boxes just click on the grey box and type your name in.
After you have done this confirm and Submit your agreements!

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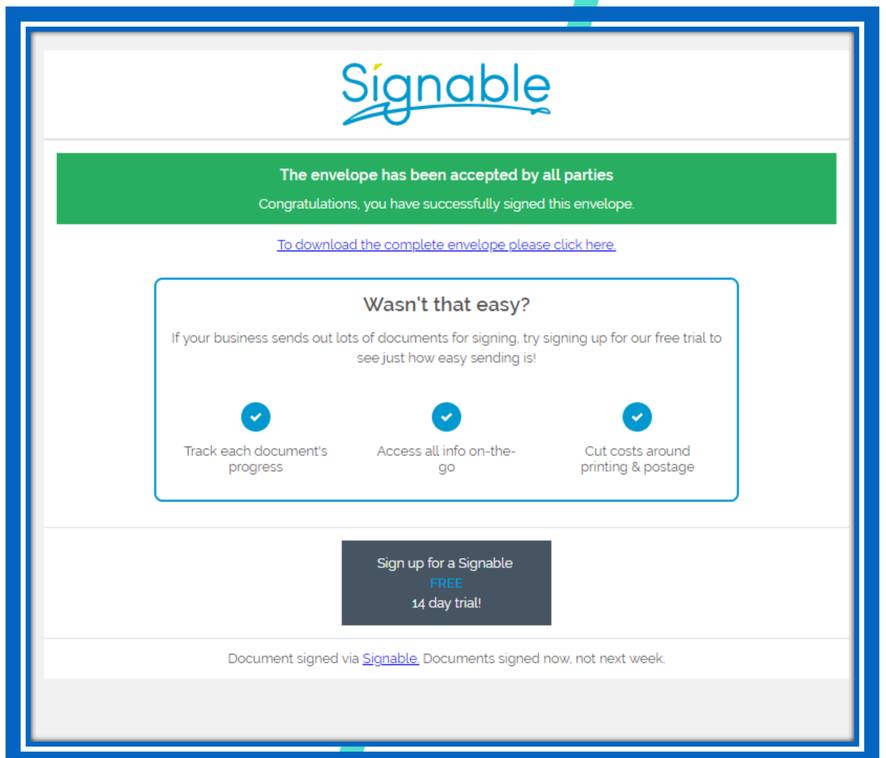

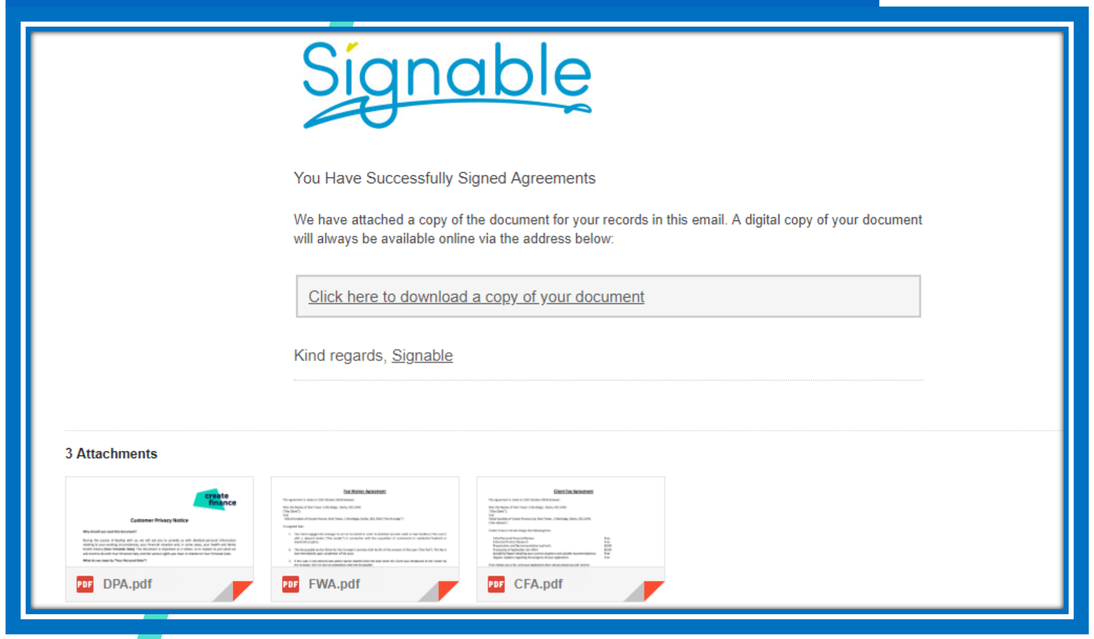

And Finally...

When you have submitted your agreements this screen should show and an email will be sent to let you know you have completed them.

Your email will show your completed agreements.

Please download your completed agreements to ensure you have a copy of what you have agreed to and can refer back to them.

If you have any further questions please speak to the team dealing with your case or ring the office and we will help as much as we can!

Happy Signing!

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How to resend agreements

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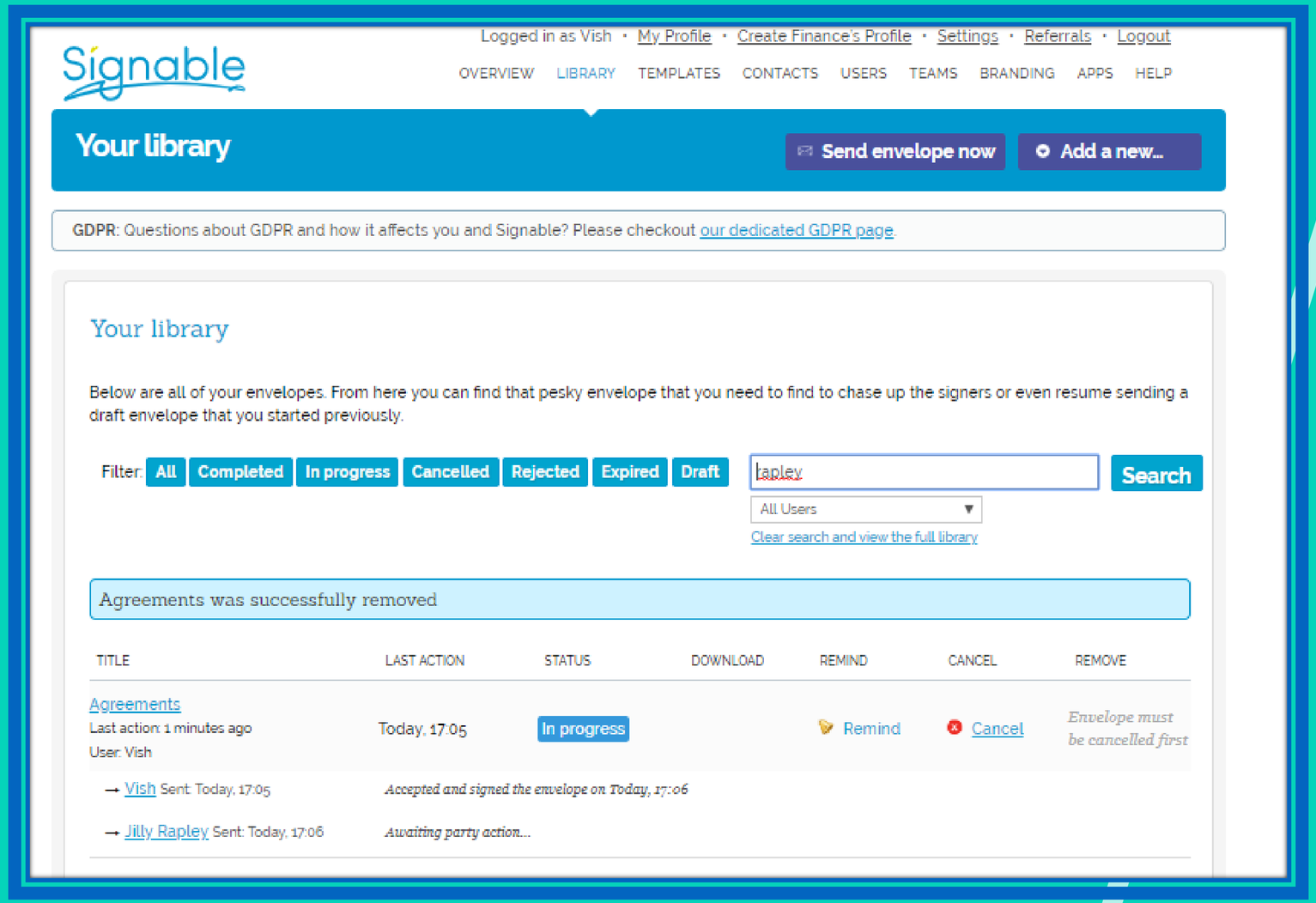
How to resend your agreements



Sometimes clients will not sign their agreements right away, we would normally give them a week to sign their agreements and if they have not signed them by then we will chase them.

Simply search your clients name in the search box. This should then bring up any agreements you have sent over to them.

Locate the correct one and click ‘Remind’

This will send an email to the client reminding them to sign.

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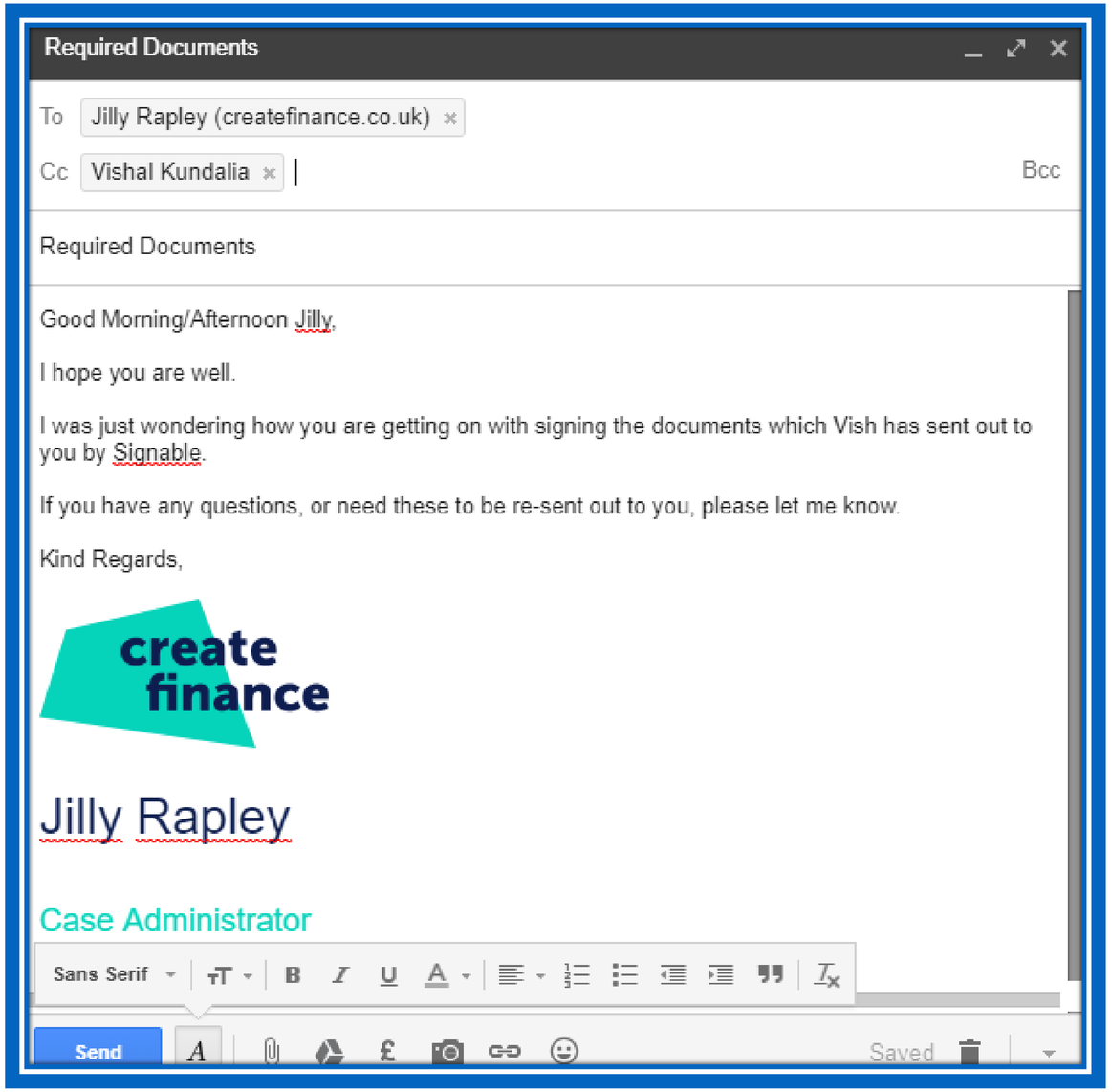
Email Chaser

As well as reminding your client to sign their documents it is important an email chaser is sent to them.

By sending an email chaser the client will feel more pressured into signing their agreements, after all without them we cannot proceed with their enquiry.