checkboard

App Users Help Guide
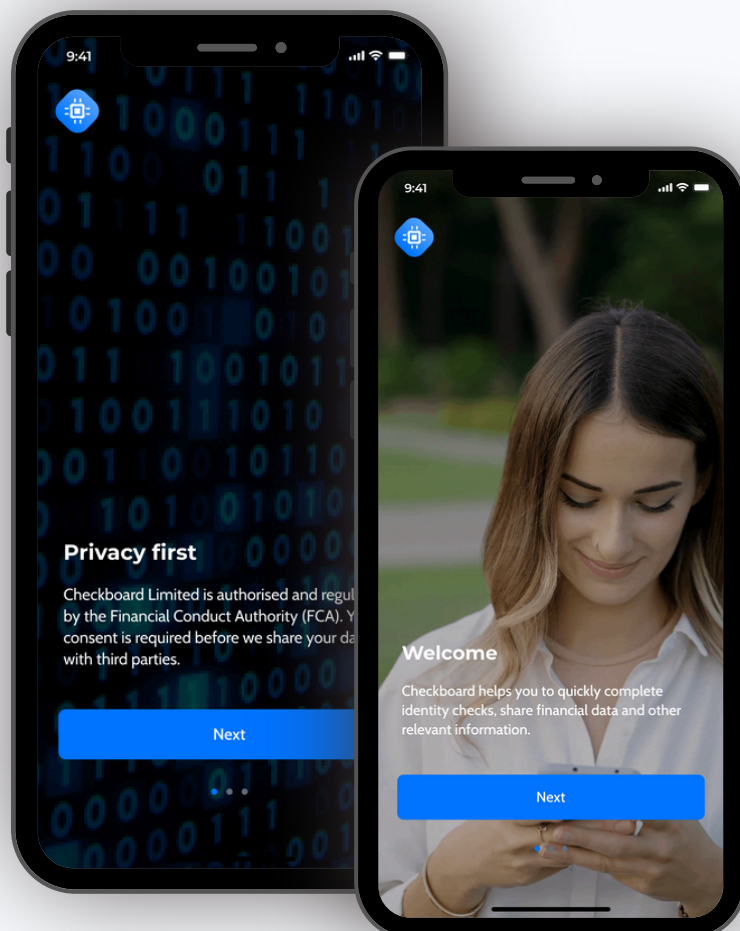
A helpful guide on how to use our app

Introduction to Checkboard

Checkboard is a convenient service that helps individuals save time when applying to buy or rent a home. Our approach is simple: we use our app to capture your personal details, verify your identity using advanced AI techniques, and connect to your financial accounts through open banking to confirm your income and regular expenditures.

Once your application is submitted, we immediately get to work. Our cutting-edge technology accelerates transaction times by up to 75% and provides personalized Checkboard reports with informative results.

Designed for estate agents, landlords, and businesses of all sizes, Checkboard provides a one-stop-shop for identity, credit, affordability, proof of funds, and anti-money laundering checks.
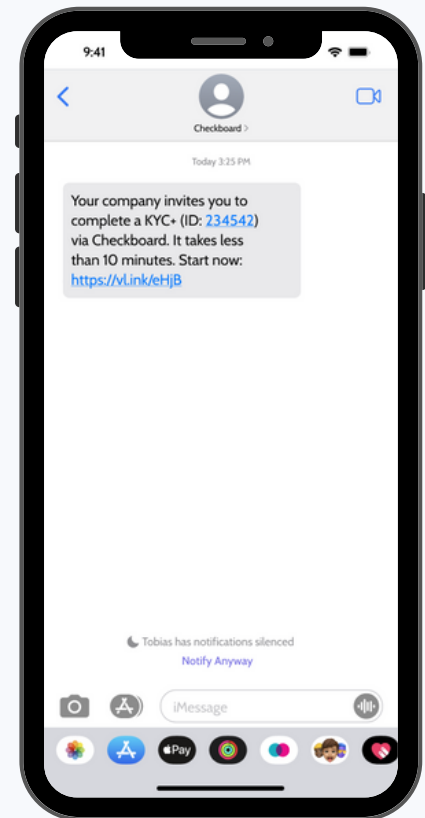
With our free mobile application, individuals looking to rent or buy can provide all the information needed to purchase or rent properties from a single provider.
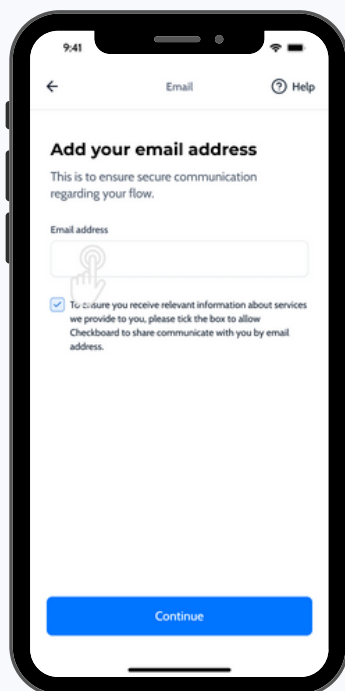
Receiving Invitation

An invitation to our app will be sent to you via text message (SMS) or email.

Your Checkboard invitations are typically sent to you via email or text message. The sender's name will appear as Checkboard. The check requester will likely ask for your contact information, such as your phone number or email, to facilitate sending the invitations.
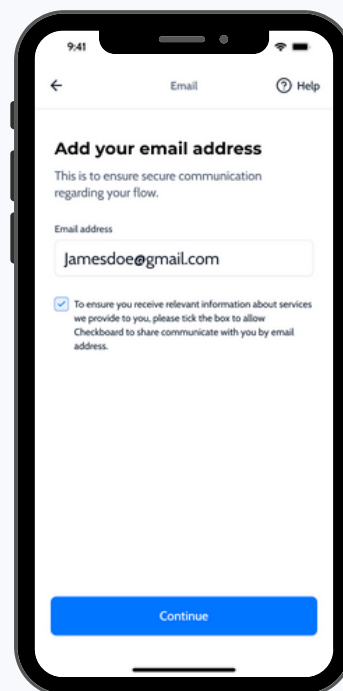
Entering Your Email Address

Tap on continue and enter your email address. You can tap outside the box or press done to confirm the email address (this depends on your phone).
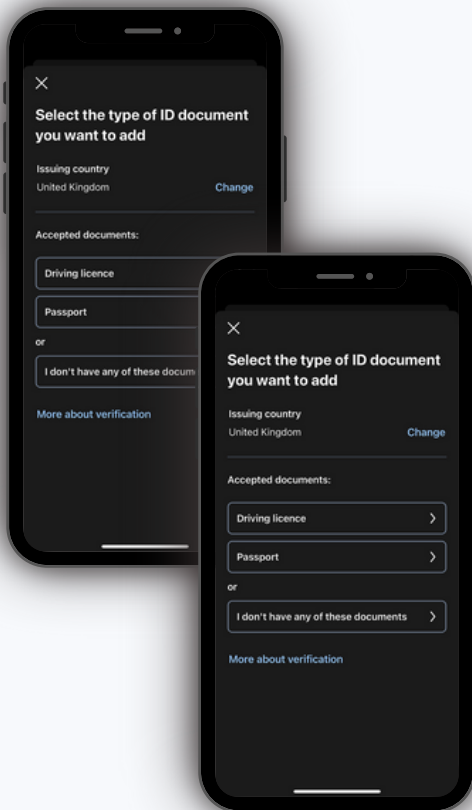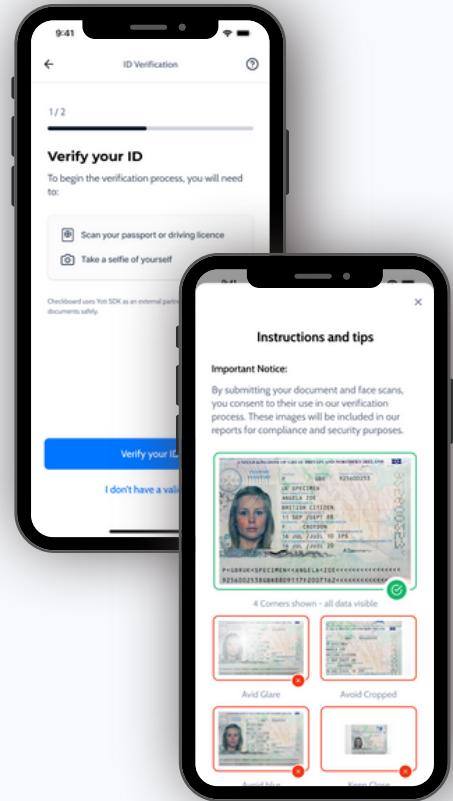
Step 1:
Tap in the box.

Step 2:
Save by tapping **continue.**

Identification Section

Step 1: Ensure you have the original in-date **passport** or **driving license** before starting this check.

Make sure you can scan the document on a neutral surface. This image which sometimes includes the background will be uploaded to your report.
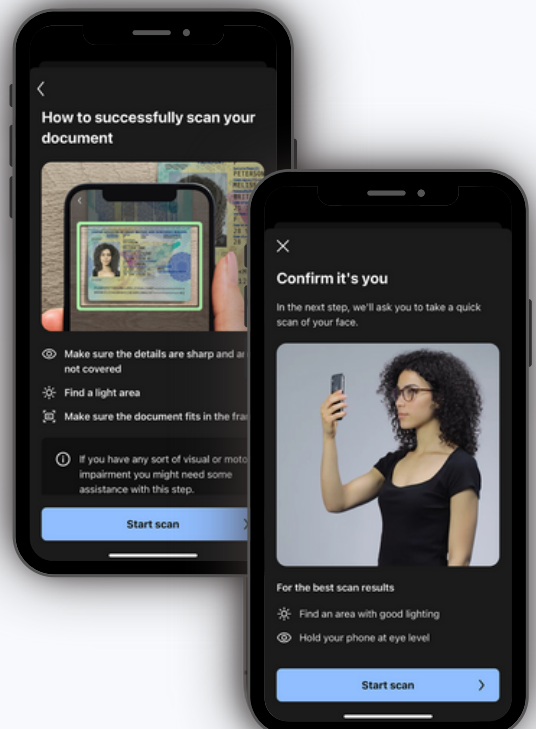
Step 2: Now that you are in a room with sufficient lighting and a neutral surface to place your document, let's start scanning!

1. Select the correct issuing country.
2. Next, select the document you wish to scan, either **passport** or **driving license.**

Step 3: Scan the ID, and make sure the whole page fits within the frame.

You want to make sure the photo capture is not blurry and not cropped.

Next, scan your face, ensure the room is bright and that your face fits within the frame.
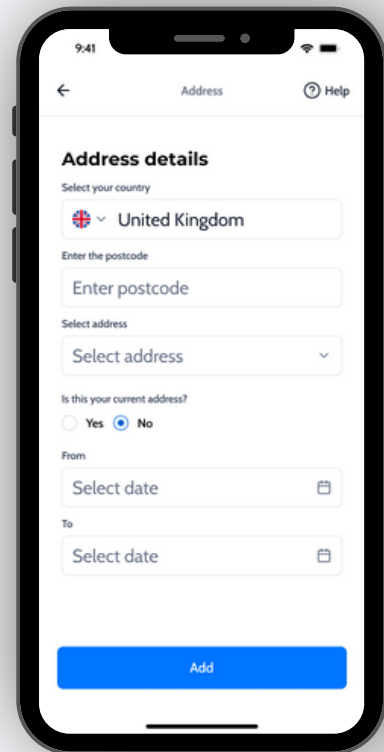
Address Verification

If you reside in the UK, follow the steps below:

- Select UK in country.
- Enter the postcode and select address from the dropdown.

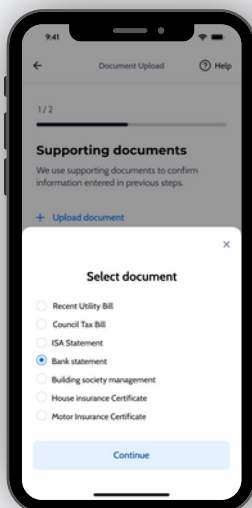**If you don't reside in the UK, please fill in all address fields.**

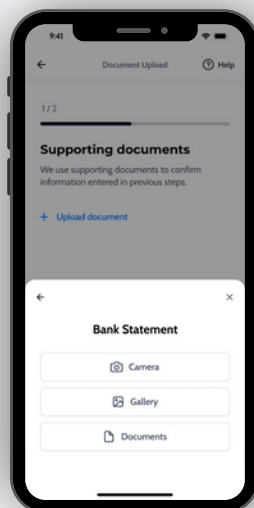To add more addresses, please tap on add address and repeat the steps.

Uploading Documents

You can upload documents to provide further evidence for things such as proof of address, employment, source of funds, etc.
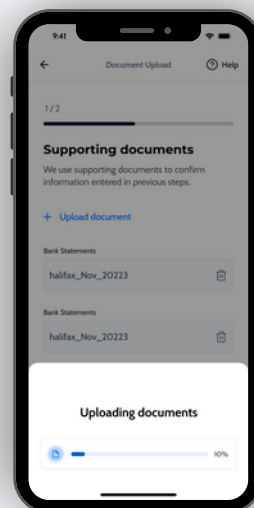
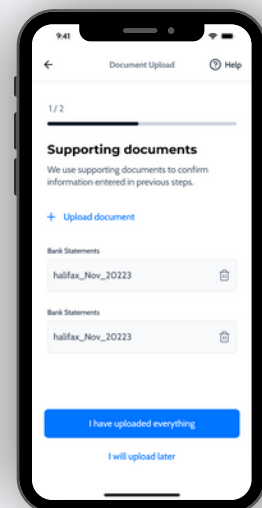Follow the steps below if you need help with uploading your documents:

Step 1: Select the type of document you'd like to upload.

Step 2: Select the source of the document. You have the camera option in case you want to take a picture of the document.
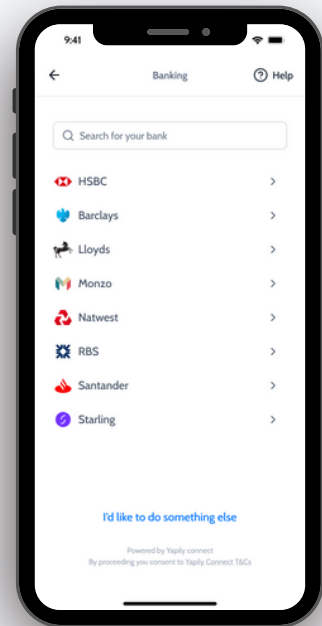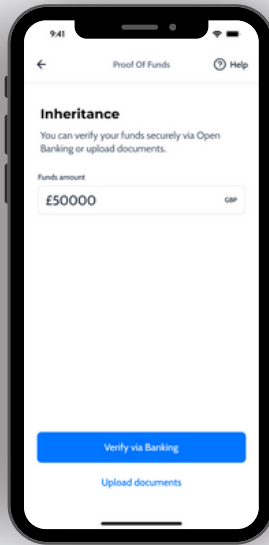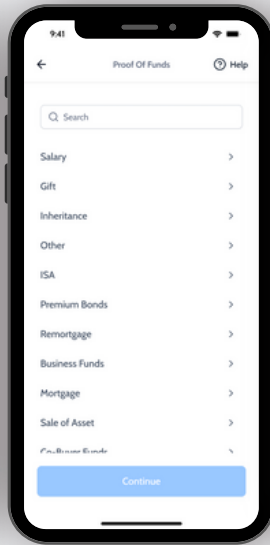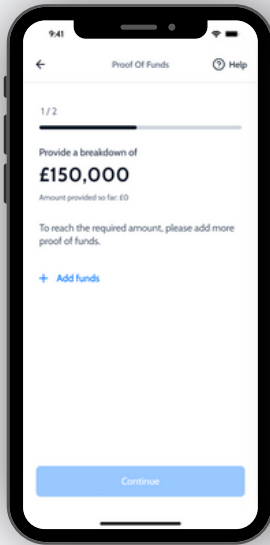
Step 3: Select the document and upload it. Wait until the upload is completed.

Step 4: You can upload further documents by tapping on *+Upload document*.

If you're happy with the document provided, you can tap *I have uploaded everything*.
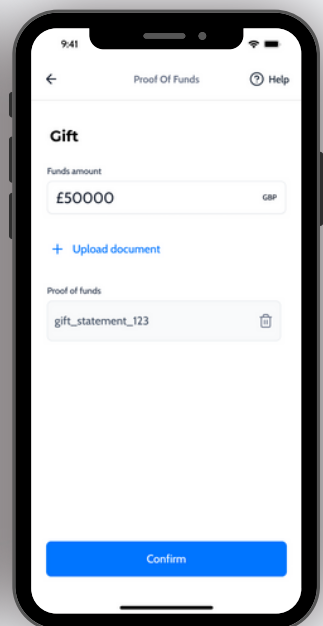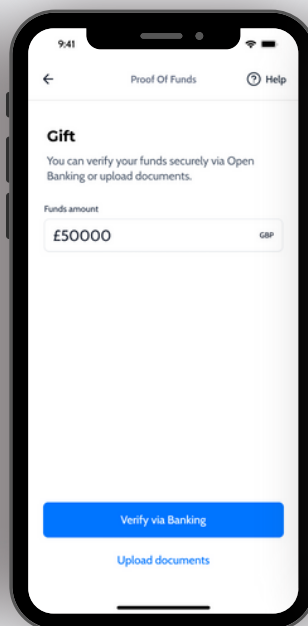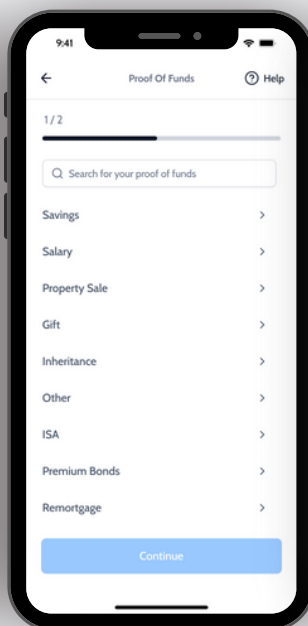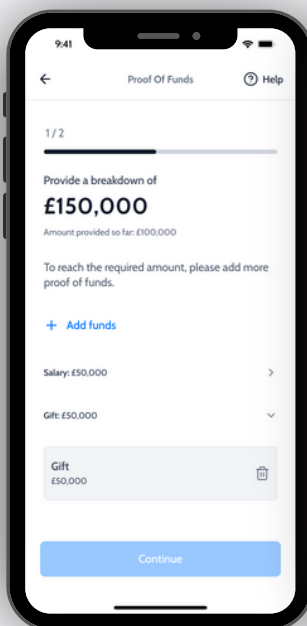
Source of Funds: Open Banking

Step 1: Tap on *+Add funds.*
Step 2: *Select on a proof of funds, i.e. Savings.*
Step 3: *Tap on* **Verify via Banking.**

Step 4:
1. Search your bank name.
2. Connect to digital banking.
3. If successful, you should be redirected back to the Checkboard app.

You can now go back to the main screen and keep adding the rest of the funds until matching the purchase price. This will allow you to move to the next step.
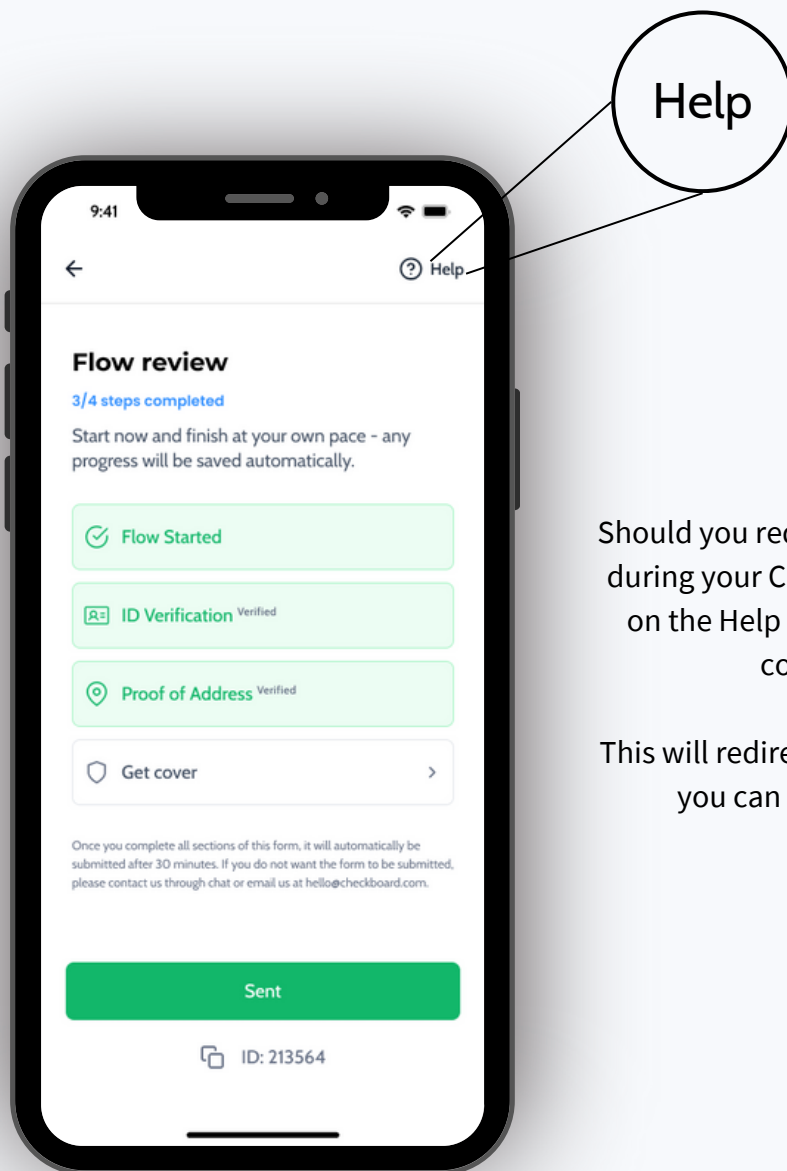

Step 1:
Click *+Add funds.*

Step 2:
Select the other fund type.

Step 3:
Enter the amount and click *+Upload documents.*

Step 4:
Enter the amount, upload a document and tap on *Confirm.*

Help Centre

Help

9:41

← ⑦ Help

Flow review

3/4 steps completed

Start now and finish at your own pace - any progress will be saved automatically.

⊘ Flow Started

▤ ID Verification *Verified*

◉ Proof of Address *Verified*

🛡 Get cover >

Once you complete all sections of this form, it will automatically be submitted after 30 minutes. If you do not want the form to be submitted, please contact us through chat or email us at hello@checkboard.com.

Sent

⊟ ID: 213564

Should you require any assistance at any stage during your Checkboard process, simply click on the Help button located in the top right corner of your screen.

This will redirect you to our Help Centre where you can find the support you need.

To access FAQs, please visit us at help.checkboard.com.
If you require additional assistance or would like to ask any further questions, reach out to our customer support team via chat in-app or via email at **hello@checkboard.com**.