

Onboarding with Wise.

A guide to your Wise Onboarding Link

Firstly, we outline the exact information and records you'll need in order to swiftly complete your onboarding with Wise.

We're looking forward to working with you. However, before we get started - we need to collect some important information

We need this information for KYC (Know Your Customer), which is a legal requirement so this needs to be correct.

Any incorrect information will slow down the set up and stop you going live.

- **Company details** (Company type, address)
- **Director/Owner details** (Names, date of birth, home address, ownership percentage)
- **Contracts & policies** (Contracts and policies you have)
- **Drivers** (How many drivers you engage with, how much you paid them last month)
- **Photo ID and proof of address** (Extra evidence to support the information collected about your business)

[I understand, continue.](#)

Next, we ask you to supply some initial information about your business so that we're able to get your Wise account setup correctly.

First name/s

Last name

Your work email address

Mobile number

Password

Company type

Limited company
A company limited by shares or by guarantee

Sole trader
A sole trader is a business owned by one person

Ordinary partnership COMING SOON
A partnership is a business owned by two or more people

Limited partnership COMING SOON
A partnership is a business owned by two or more people

Limited liability partnership COMING SOON
A partnership is a business owned by two or more people

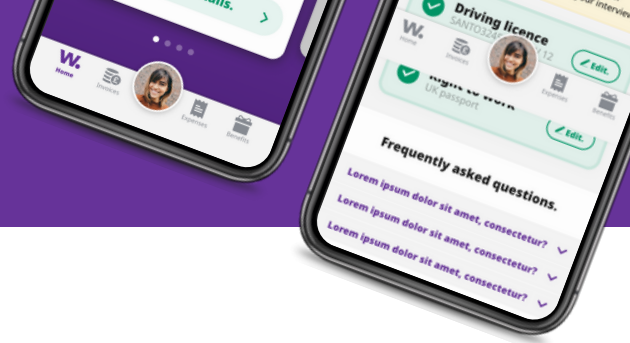
Are you VAT registered?

No Yes

VAT number

I've read and agree with [Wise Terms and Conditions](#) and [Privacy Policy](#).

[Create account.](#)



Following this, we'll ask for some details regarding the ownership and setup of your business - if you supply your company number, we'll be able to auto-fill the majority of this information on your behalf.

Company number
We will use your company number to help pre-fill your signup process from Companies House (Gov.uk).

12343231

Companies House Details

Company name

Company address line 1 Company address line 2

Town/City Postcode

Country

Do you work from a different address?
 No Yes

Director/Shareholders details

We need Director and shareholder details for KYC. The main Director should be the key point of contact for the business and in most cases the person filling out this form.
We also need the same information for ALL Directors/Shareholders of the business.

Total shareholder %
This is the shareholding of the business that you've told us about.

0% 25% 50% 75% 100%

To complete this part of the setup we need to know a minimum of 76% of the shareholding.

Add a director/shareholder

First name/s Last name

Type
Lorem ipsum dolor sit amet

Ownership %
Lorem ipsum dolor sit amet

Use as main contact

Email address Phone Number

Date of birth
Day Month Year

Home address line 1 Home address line 2

Town/City Postcode

Country

Proof of ID evidence
Lorem ipsum dolor sit amet, consectetur adipiscing elit.

Proof of address Evidence
Lorem ipsum dolor sit amet, consectetur adipiscing elit.

We'll then ask you to share some details with us around your business' driver workforce.

Driver numbers

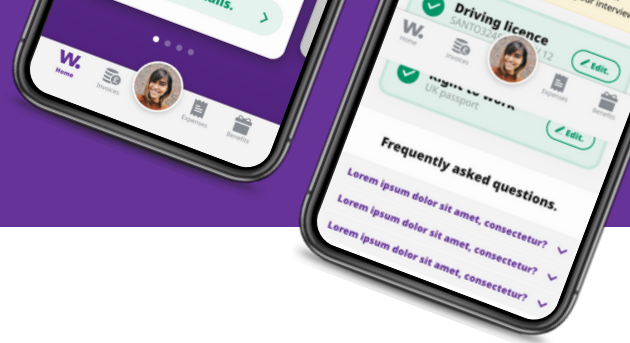
How many drivers work for you? How many of these are self-employed?

How many of these work with DPD

What was the total amount the business paid to drivers last month?

An amount to the nearest £1000.

I confirm that the above information is correct.
 I am happy for Wise to use the above information to check and verify my business.




In this next step, we'll ask you to confirm the policies that you would like your drivers to sign as part of their onboarding journey.

Contracts between you and your drivers

It's important that you have contracts (or Service Level Agreements) with your drivers as part of their self-employed status. If you don't have them, we can support you with a free template for your business.

DPD

I would like to use the Wise template I want to use my own contract

 **DPD_Contract.PDF**
3.23mb

Policies

Below is a list of policies that DPD requires all of its drivers to have signed. These will be added to your driver onboarding process.

- Owner Driver Alcohol Policy
- Owner Driver Data Policy
- Owner Driver Dignity at Work Policy
- Owner Driver Drug Policy
- Owner Driver Smoking Policy
- Owner Driver Social Media Policy
- Owner Driver Zero Tolerance Policy

Additional policies

Please add any additional policies that you would like your drivers to sign as part of their onboarding journey.

Cyber security policy Remove


[Add policy.](#)


Adopt a signature


To make the policies, contracts and onboarding elements of the Wise platform easier, we create an online signature for each of our clients to use within the system. Please enter your name below and select which signature you would like to use.

Name

Click on the signature you would like to use







[Continue.](#)

Once you've done this, you're in the final stage of your system setup and soon you'll get access to your business's bespoke Wise platform. If you're having any issues, please contact your regional account manager.