Getting started using e-signatures with formsRus.com

Log in to your formsRus.com account and create and save a new document from your "FORMS LIST" tab or select an existing saved document(s) from your "SAVED FORMS AND DOCUMENTS" tab that you wish to add an e-signature to.

Select the document(s) to add the e-signature to by checking the far left box next to the file name. This will put this/these document(s) in a QUEUE. To select ALL documents within a folder, simply click on the Folder name and then check the "All" box directly under the folder. (You can select files from multiple folders if necessary to add to your queue simply by going to that folder and repeating the steps above.)

The **red** "PROCESS QUEUE" button will appear along with the number of documents that you have selected. Click this button.

Next, the "Selected Items in Queue" screen will list the document(s) that you wish to obtain a digital signature on the left and the options you may perform on the right, select the "DIGITALLY SIGN by SETLLEWARE" option.

Choose to either "AUTO FILL WITH SELECTED CLIENT" or "DON'T AUTO FILL".

(The "AUTO FILL WITH SELECTED CLIENT" option auto populates the e-signature submission page with the email addresses that you have already provided for this client listed under your "MANAGE CLIENTS" tab. The "DON'T AUTO FILL" option will take you to the same e-signature submission page where you will manually type the client email address(s) that you wish to send the document(s) to for e-signature. If you don't wish to use an existing client's email address(s) or the client is not listed, simply click on "Don't Auto Fill" and the "Signature Request" screen will appear.)

Your email address will automatically appear on the left under "Sender Information". (This is pulled from your own personal user profile listed under your "My Profile" tab.)

The REQUEST TITLE field below it ***must*** have text entered or you will not be able to send the document(s) out for e-signature. This can be whatever you want to use to describe or designate this request as. (i.e. – 123 Smith Street Counter Offer)

Enter your client(s) email addresses under the appropriate spot for BUYER or SELLER. You can add as many additional email addresses as you like in the "OTHER SIGNERS EMAIL" (if you only need one additional signer) and "ADDITIONAL SIGNERS EMAIL" (if you need more than one additional signer) fields. These signatures will appear by default at the bottom of the last page of each document.

If all documents are part of the "Forms List" library, the location(s) for the signature(s) have been pre-tagged and you will not have to drag-n-drop the location for signatures on each of these documents.

NOTE - If you have added an "Other Signer" or "Additional Signers", you will want to choose "Submit and Customize Signing Locations" instead, so you can manually drag and drop those signer locations where you want them to appear. (Only signature locations listed under "Buyer Signatures" and "Seller Signatures" have been pre-tagged)

If you click on "Submit with Default Signing Locations", the document(s) will each be listed with an immediately be sent out for e-signing. The "Signature Status" page will show all required signers for each document along with signature status.

Once all required signers have e-signed the document(s), all parties will receive a completed, final copy via email as a secure PDF attachment. (In addition you can view the current status of all of your e-signing submissions under the "My Profile" tab, then choose "Signature Requests".)

As the submitter or this document(s), you will receive an email notification that your signature request has been created.

Your client(s) will receive an email from formsRus.com with a secure link to the document(s) where they will be able to e-sign the document(s). Your information will appear in the secure email link letting them know it was you who originated the request.

The signer(s) simply click on the "CLICK HERE TO SIGN YOUR DOCUMENTS" link in the email. (This will open the secure link to all documents sent for signing).

The signers will select the 1st document that they are required to e-sign. They may then scroll to the area(s) for signature or simply click the highlighted signature locations (in the upper left portion of the screen where indicated) and automatically be driven directly to each location that a signature or initial is required.

The signer(s) simply types their full legal name in each required field (or initials if required) and hits the Enter key.

They will need to repeat this process for all other documents that were sent with this request while still in the secure signing room.

Note- *if two or more signers share an email address (ie. Husband/wife/etc.) you must submit the document for signing twice. Once for signature one, then a second time using the UPLOAD NEW DOCUMENTS tab. Or, simply have the other signer get a new free email address from Gmail, Yahoo or Outlook.com and use that for them.*

After completing all signature requests the signer(s) will be required to check the small "Consumer Disclosure" box marked "SUBMIT HERE" located at the bottom left of the document that they are signing.

To finalize the signing, the signer(s) simply needs to click the "SUBMIT ELECTRONICALLY" button located at the bottom of the screen.

This will capture and digitize the clients signature(s) and notify you (the document originator) that this party has signed the document(s). In addition, the signer has the option to Print the "Signed" or "Partially Signed Document" right then and there.

Once ALL signatures are obtained, ALL parties will automatically receive the final document(s) as secure PDFs with ALL signatures via email, which may be saved, printed, forwarded, etc.

You as the AGENT are able to see if the recipients have viewed/signed the document(s) under your “MY PROFILE” and choosing “SIGNATURE REQUESTS”, then “Advanced Options”, then “Advanced Control Panel” and click on “View Activity”.

TO UPLOAD “OTHER” NON-FORMS DOCUMENTS

Under the “SAVED FORMS AND DOCUMENTS” tab, click on the “UPLOAD NEW DOCUMENTS” button on the right. This will allow you to choose new files to upload from your computer or simply drag and drop files in to that folder.

You may create a new folder or choose an existing folder that you wish to upload the document(s) into prior to *or* after clicking the UPLOAD button.

The file will UPLOAD and will be available to QUEUE just as the “Forms List” interactive forms are.

These documents are NOT pre-tagged. By default, signature(s) will be located on the bottom of the last page of these document(s).

You will want to Process these with Settleware as outlined earlier and follow all previous instructions up to the point of SUBMIT WITH DEFAULT SIGNING LOCATIONS. For these documents, you will choose “SUBMIT AND CUSTOMIZE SIGNING LOCATIONS”

This will again take you to the SIGNATURE STATUS page where this time you will click the “ADD/EDIT SIGNING LOCATIONS” link.

NOTE- *It is possible to have LIBRARY/Forms List documents and NON LIBRARY documents listed here. You will only need to edit the locations of signatures on the NON LIBRARY documents, as the others will remain pre-tagged.*

Once you click the “ADD/EDIT SIGNING LOCATIONS” link you will be directed with a secure link to the document(s) to select and locate your signature spots.

Scroll to the area on your document(s) that you wish to locate the signatures (or any of the available options like initials, date, time, or label.)

In the upper-left corner white box, select the SIGNER that you wish to locate a signature for. (If there are multiple signers, they will still *all* be listed as 1st signer).

Choose who you want to locate and click on the "Full Signature" button from the left menu and you will see the signature box appear. Simply drag it where it goes on your document. Repeat this process for all of your signers.

NOTE -If the "Full Signature" block is too large for the space on your document, you can remove it by clicking the small "X" in the upper-right corner of the signature block that you placed and then click on the "Small Signature" button from the left side of your screen instead. You will notice that the "Small Signature" block can fit in a smaller area. Drag and place it where it goes. The small signature block does NOT have the date or time built-in it like the "Large Signature Block" does, so be sure to add the date and/or time field if necessary when using the small signature block. Also worth noting, the "Large Signature Block" can only be used once per document. If the signer(s) are required to sign a single document in more than one spot, you'll need to use the "Small Signature Block" for the remaining locations.

Once all signature locations have been placed for all SIGNERS, click the **blue** diskette icon on the top right. A **green** bar across the top will indicate that your **"Document is saved successfully".**

Next, click on the little **brown** door icon to the right of the **blue** diskette icon and you will be taken back to the "SIGNATURE STATUS" page.

Now you may click on the "INVITE SIGNERS" button and follow the previous instructions above.

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Create | Organize | Manage

Add photo and customize your personal Settleware e-signing room

1) **Go to https://esign.settleware.net/user_create.aspx**
2) **Sign yourself up for a Settleware account using the same email address that you use with your formsRus.com online forms account under the "Login Information" section. You will need to create and confirm a password to be used with your signing room here. Under the "Personal Information" section, add your first name and last name and then click on the green "Sign Up" button at the bottom.**
3) **On the next page, you'll need to check the box labeled "I have read the user agreement and agree to its terms." and then click on the blue "Create Account" button.**
4) **An activation email will be sent to your email account from "Sertifi Services". Please open this email and click on the button that says, "Enable My Account".**
5) **You will now be taken to your Settleware Signing Room login page and you will see a message that says "Thank you for activating your account. Please login below."**
6) **Type in your email address and new password that you just created and click "Log In"**
7) **Now, click on the "Administration" button at the top of the page (Gear icon). Next, click on "My Profile".**
8) **You will now be on your "Maintain My Account" page. Click on "Edit Personal Info" at the bottom.**
9) **Click on "Choose File" and upload the picture that you wish to use for your personal signing room. You will see the name of your file next to the "Choose File" button.**
10) **Fill out all the information that you wish to enter, such as Initials, Title, Company, primary phone number, preferred language, etc. Most of this will not show up in your personal signing room for your clients to see when they sign documents. (Only your Name, Primary phone number, Email address and picture will show up to your clients)**
11) **Check the box that says, "Prefill Signature Fields" if you want the system to automatically add your signature and initials to documents that you must sign instead of you having to type them in every location each time you need to sign. It's a time saver and we recommend it! ☺**
12) **Click on the Blue "Save" button at the bottom of the page.**
13) **Next click on the "Log Out" button in the upper right corner of the screen.**
14) **You are finished!**

****PLEASE NOTE** - When you go back into your profile it might NOT show you your picture that you uploaded; however, rest assured that it will be there when you submit a document for e-signing. It should show up later on if you ever log back in to your Settleware portal directly. Go ahead and send yourself a test document to e-sign to make sure everything looks OK to you. It will stay set this way forever unless you decide to change it! ☺**