

This guide was prepared to show our members how to submit saved forms (and/or uploaded documents) out for e-signature using our built-in integration with Settleware's secure e-signing services.

Once you login, you will be presented with the list of your association's forms. (see screenshot below) Choose the New Form(s) or Forms Packages that you wish to fill out, save and then send out for e-signatures.

The screenshot shows the formsRus.com dashboard. At the top, there's a navigation bar with tabs: FORMS LIST, SAVED FORMS & DOCUMENTS, MANAGE CLIENTS, MY PROFILE, SETTINGS, PURCHASE, HELP, and LOGOUT. Below this, there are sections for 'PACKAGES FOR JANE DOE' and 'FAVORITE NEW FORMS FOR JANE DOE'. The 'New Forms for Acme Association of Realtors' section is expanded, showing a table of forms:

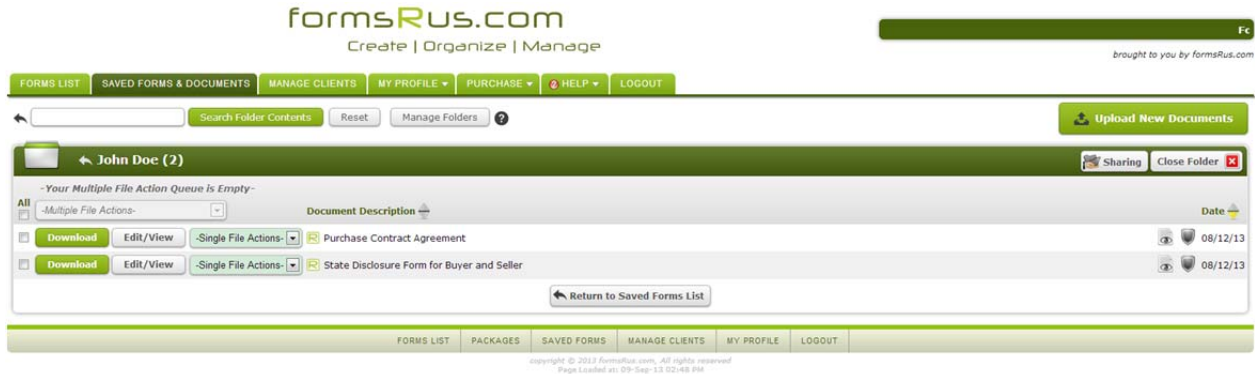
Favorite	New Form	Auto Fill	Form No.	Description
<input type="checkbox"/>	New Form	Auto Fill		Exclusive Right to Sell Agreement
<input type="checkbox"/>	New Form	Auto Fill		State Disclosure Form for Buyer and Seller
<input type="checkbox"/>	New Form	Auto Fill		Helpful Hints
<input type="checkbox"/>	New Form	Auto Fill		Auto Fill Linking example-Please use the SAMPLE data to see ALL the linked data

At the bottom of the dashboard, there's a copyright notice: 'copyright © 2013 formsRus.com. All rights reserved. Page Created at: 10/13/13 02:34 PM'.

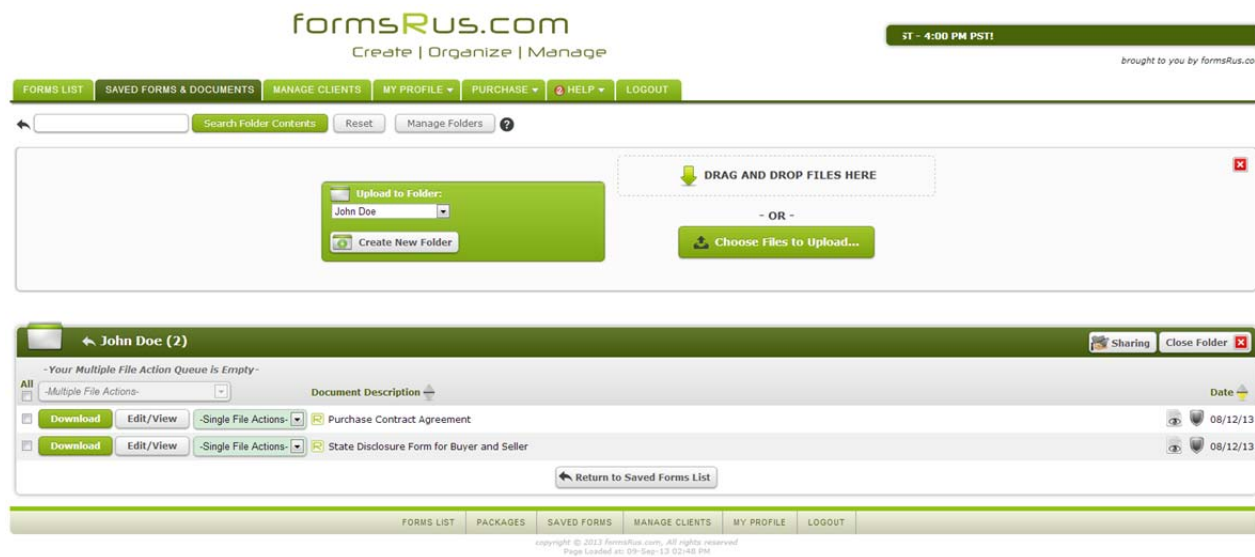
Once you have completed filling out and saving the form(s) that you wish to send out for e-signature, click on your "Saved Forms & Documents" tab and you will see a screen similar to the below image which contains the form(s) that you just saved. (Notice: I created a folder named John Doe and stored my forms in there. Please note that you can name the forms whatever you want before saving them)

The screenshot shows the 'Saved Forms & Documents' section of the formsRus.com dashboard. At the top, there's a search bar with 'Search Folder Contents', 'Reset', and 'Manage Folders' buttons. Below the search bar, there's a section for 'Upload New Documents'. The main area shows a list of folders: 'Default', 'John Doe', and 'New Folder'. At the bottom, there's a navigation bar with tabs: FORMS LIST, PACKAGES, SAVED FORMS, MANAGE CLIENTS, MY PROFILE, and LOGOUT. A copyright notice is visible at the bottom: 'copyright © 2013 formsRus.com. All rights reserved'.

Next, I click on the “John Doe” folder which is where I saved my forms. When you click on the folder, it will show you the contents of the folder as seen in the image below.



Now, let's say that you also have a Word document, Excel spreadsheet, PDF file or some other document that you need to also send out for e-signing along with your saved forms. All you need to do is click on the “Upload New Documents” button and you will see the following screen.



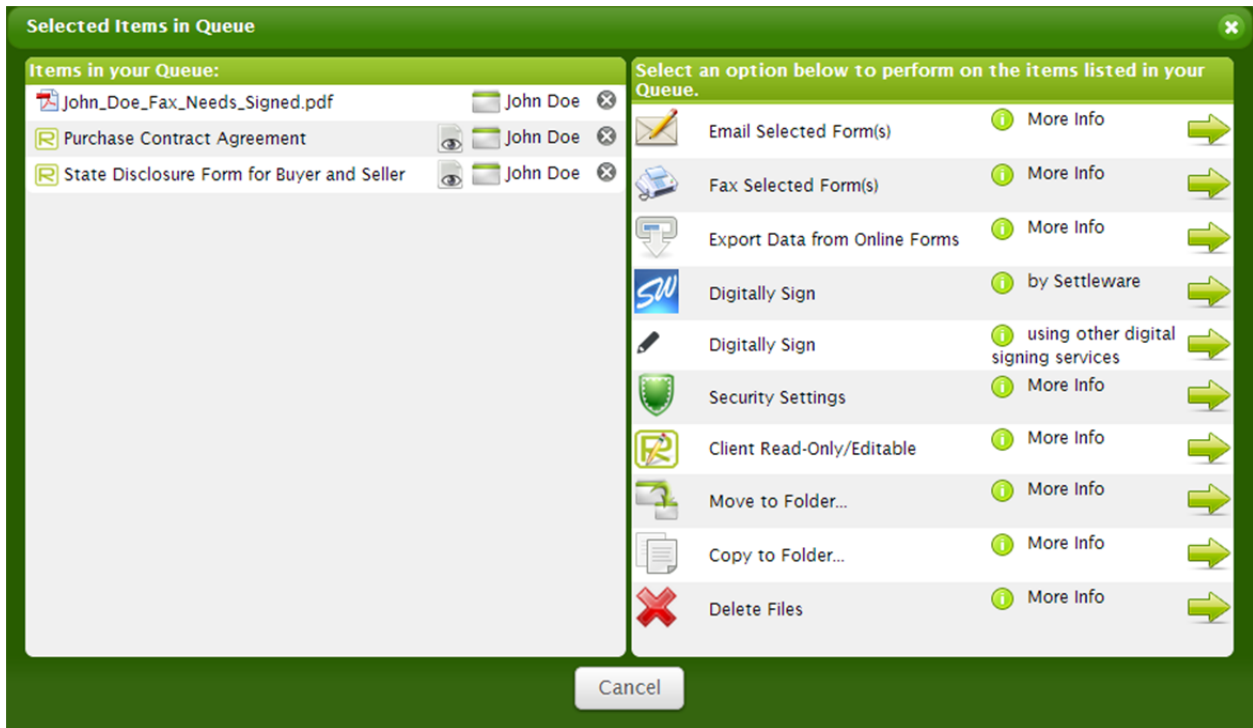
All browsers will allow the “Drag and Drop Files Here” method of uploading EXCEPT for Microsoft Internet Explorer version 9 and older. With older versions of IE, you’ll need to click on the “Choose Files to Upload” button and upload your files that way. In the screenshot below, I just uploaded a PDF Fax that I received from UFAX.NET in my email and which my customer John Doe also needs to e-sign.



Next, I am ready to send my documents out to John Doe and other required e-signers. So, I check the box preceding each of the documents listed that I need e-signed. In this case, I check the PDF fax that I uploaded as well as the State Disclosure form and Purchase Contract form that I filled out and saved earlier. See the below screenshot which shows these documents checked. *(And yes, you can select documents and forms from multiple folders simultaneously to send out for e-signing as the system will automatically create a "Queue" as you select documents.)* 😊



Now, simply click on the RED "Process Queue" button to continue on to available processing options and you will see the screen below. *(Note: You may also click the 'Multiple File Actions' menu pull-down and choose "Digitally Sign (SW)" from the list as a quicker way and to skip the options screen completely.)*



On the left side, you see a list of the documents in your queue that you want to perform an action on. From the list of options on the right side, simply click on the “Digitally sign by Settleware” link to continue and you will see the screen below.



If you have any clients set up under your “Manage Clients” button, they will all show up as an option to select for the “Auto Fill with Selected Client” button. If you select an existing client and click on the “Auto Fill with Selected Client” button, all of the email addresses for the buyers and sellers, etc. from that client will automatically populate the next screen which is where you send your documents out to be e-signed. Otherwise if it is a new client or if you want to manually choose which email addresses receive the document(s) to be e-signed, simply click on the “Don’t Auto Fill” button and you will see the screen below.

Forms

Action: Signature ▾ Purchase Contract Agreement

Action: Signature ▾ State Disclosure Form for Buyer and Seller

Documents

Action: Signature ▾ John_Doe_Fax_Needs_Signed.pdf

Sender Information

Your Email: *

Request Title: *

* = Required Field

Buyer Signatures

Buyer 1 Email:

Buyer 2 Email:

Buyer 1 Agent Email:

Buyer 2 Agent Email (Broker):

Seller Signatures

Seller 1 Email:

Seller 2 Email:

Seller 1 Agent Email:

Seller 2 Agent Email (Broker):

Other Signatures

Other Signer's Email:

Other signer not listed in buyer or seller

Additional Signer Emails:

One or more additional signer emails. Comma separated

Cancel
Submit And Customize Signing Locations
Submit With Default Signing Locations

Notice that you see all three documents listed that I selected earlier to be sent out for e-signing. Two of them are listed under "Forms" because they were the association's forms that I filled out and saved. One of them is listed under "Documents" as that is the Fax that I manually uploaded into the John Doe folder earlier.

Your email address will automatically appear under "Sender Information" as it is being pulled from your email address that you have listed under your own "My Profile" tab. Simply type a title for these documents that you are sending out for e-signatures.

Also add the required email addresses for everyone that needs to e-sign these documents under the proper sections. For example, add seller and seller agent email address(s) under the “Seller Signatures” section. Add buyer and buyer agent email address(s) under the “Buyer Signatures” section and finally add any other required signer email address under the “Other Signer’s Email” section. If still more signers are required, please add them under the “Additional Signer Emails” section separated by commas. See the screenshot below for a completed example.

The screenshot displays a web-based document signing interface. At the top, there is a green header labeled "Forms". Below it, two document entries are listed, each with an "Action" dropdown set to "Signature" and a document icon. The first entry is "Purchase Contract Agreement" and the second is "State Disclosure Form for Buyer and Seller".

Below the forms section is another green header labeled "Documents". It contains one document entry: "John_Doe_Fax_Needs_Signed.pdf" with an "Action" dropdown set to "Signature".

The interface is divided into four main sections for signature information:

- Sender Information:** Includes "Your Email: *" with the value "Agent@Company.com" and "Request Title: *" with the value "123 Smith St Purchase Contract Documents". A note below states "* = Required Field".
- Buyer Signatures:** Includes fields for "Buyer 1 Email:" (value: "yourbuyer@buyer.com"), "Buyer 2 Email:", "Buyer 1 Agent Email:" (value: "yourbuyeragent@agency.com"), and "Buyer 2 Agent Email (Broker):".
- Seller Signatures:** Includes fields for "Seller 1 Email:" (value: "yourseller@seller.com"), "Seller 2 Email:", "Seller 1 Agent Email:" (value: "yourselleragent@agency.com"), and "Seller 2 Agent Email (Broker):".
- Other Signatures:** Includes "Other Signer's Email:" (value: "otherrequiredsigner@signer.com" with a note "Other signer not listed in buyer or seller") and "Additional Signer Emails:" (value: "janedoe@doe.com,mattdoe@doe.com" with a note "One or more additional signer emails. Comma separated").

At the bottom of the interface, there are three buttons: "Cancel", "Submit And Customize Signing Locations", and "Submit With Default Signing Locations".

At this point you are now ready to send these documents out for e-signing! 😊

If you click “Submit with Default Signing Locations”, the documents will be sent out immediately and all of the electronic signatures will automatically be added to the last page of each document required for e-signing. However, if your association has “pre-tagged” forms set up with formsRus.com, then the signatures may already be located in the correct spots for all forms under the “Forms” section. Please check with your association to see if your forms are “pre-tagged” or not. For any uploaded documents which appear under the “Documents” section, the e-signatures will appear at the bottom of the last page by default. *(If you are unsure as to where the signatures will be located on the documents, choose the “Submit and Customize Signing Locations” option and scroll down to page 9 of this document to that section so you can learn how to verify where the signatures are and how to locate the signatures before sending the document(s) out to be e-signed.)*

Below is a screenshot of what you will see next after clicking the “Submit with Default Signing Locations” button.

Signature Status: John Doe Purchase Contract Documents

State Disclosure Form for Buyer and Seller
Date Uploaded: 07/03/2013 03:09 PM
Status: Unsigned
Password Protected: No
Links: [ADD/EDIT Signing Locations](#)

Awaiting Signatures From

Signer	Type
yourbuyer@buyer.com	1st Signer
yourseller@seller.com	1st Signer
othersignerifrequired@signer.com	1st Signer
yourselleragent@agency.com	1st Signer
yourbuyeragent@agency.com	1st Signer

Purchase Contract Agreement
Date Uploaded: 07/03/2013 03:09 PM
Status: Unsigned
Password Protected: No
Links: [ADD/EDIT Signing Locations](#)

Awaiting Signatures From

Signer	Type
yourbuyer@buyer.com	1st Signer
yourseller@seller.com	1st Signer
othersignerifrequired@signer.com	1st Signer
yourselleragent@agency.com	1st Signer
yourbuyeragent@agency.com	1st Signer

John Doe FAX Needs Signed.pdf
Date Uploaded: 07/03/2013 03:09 PM
Status: Unsigned
Password Protected: No
Links: [ADD/EDIT Signing Locations](#)

Awaiting Signatures From

Signer	Type
yourbuyer@buyer.com	1st Signer
yourseller@seller.com	1st Signer
othersignerifrequired@signer.com	1st Signer
yourselleragent@agency.com	1st Signer
yourbuyeragent@agency.com	1st Signer

[Advanced Options](#) [View Signature Requests](#) [Return To Saved Forms](#)

Notice that it is a summary of all of the documents that you submitted to be e-signed with who needs to e-sign each document along with the status of each.

The below email will be sent out to all of the required e-signers immediately as well as to you (the originator of the documents) notifying you as to who has e-signed. *(And no, your clients do NOT need a Settleware account to easily e-sign your documents)*

Welcome to the formsRus.com eSignature Program

Thank you for choosing formsRus.com to assist you with your real estate transaction.

A member using the formsRus.com online document management system has prepared documents for your signature. Our program allows you to review and sign these documents in a secure electronic environment.

1. Click the link below to access your documents
 2. Click the green box which says "Click here to review and sign"
 3. Review the document by scrolling through multiple pages
 4. Please note in Item 2 of the Signing Instructions box each page which needs a signature or initials
 5. At each signature or initial box, click on the box and type your name
 6. Endorse by clicking the checkbox at the bottom of the page next to green arrow which says "Submit Here"
 7. Click green box which says "Submit Electronically"
- After submission, the confirmation page will provide you an opportunity to print your signed document
 - You will also be emailed a pdf copy of your signed documents

[Click Here to Sign Your Documents](#)

If you need assistance or have any questions related to your documents, please contact your agent.

Thank you for choosing formsRus.com

To view the status of all of your documents that have been sent out for e-signing, simply click on the "My Profile" tab and select "Signature Requests". You will see the below screen.



Your documents that have been sent out for e-signatures will be listed newest to oldest.

If you click on “View Status”, you will see the same screen you saw after clicking on the “Submit with Default Signing Locations” button earlier, only it will show you a live status of who has signed and who still needs to sign for each of your e-signature submissions.

Once one person e-signs a document the status goes from “Unsigned” to “Partially Signed”. Once everyone e-signs a document the status goes from “Partially Signed” to “Signed” and all required signers will receive a final email with a secure PDF attachment that contains the final, executed documents to store and keep. In addition, your own Settleware account will keep a copy of your e-signed documents indefinitely and will always be accessible via the “My Profile”, “Signature Requests” tab.

The other option is the “Submit and Customize Signing Locations” button. This is how you can drag the signature locations wherever you want them on the document. If you click that button, the following screen appears.

The screenshot shows the formsRus.com interface. At the top, the logo 'formsRus.com' is displayed with the tagline 'Create | Organize | Manage'. A navigation bar contains links for 'FORMS LIST', 'SAVED FORMS & DOCUMENTS', 'MANAGE CLIENTS', 'MY PROFILE', 'SETTINGS', 'PURCHASE', 'HELP', and 'LOGOUT'. The main content area shows a document titled 'John Doe FAX Needs Signed.pdf' with a status of 'Unsigned'. A table lists the signers:

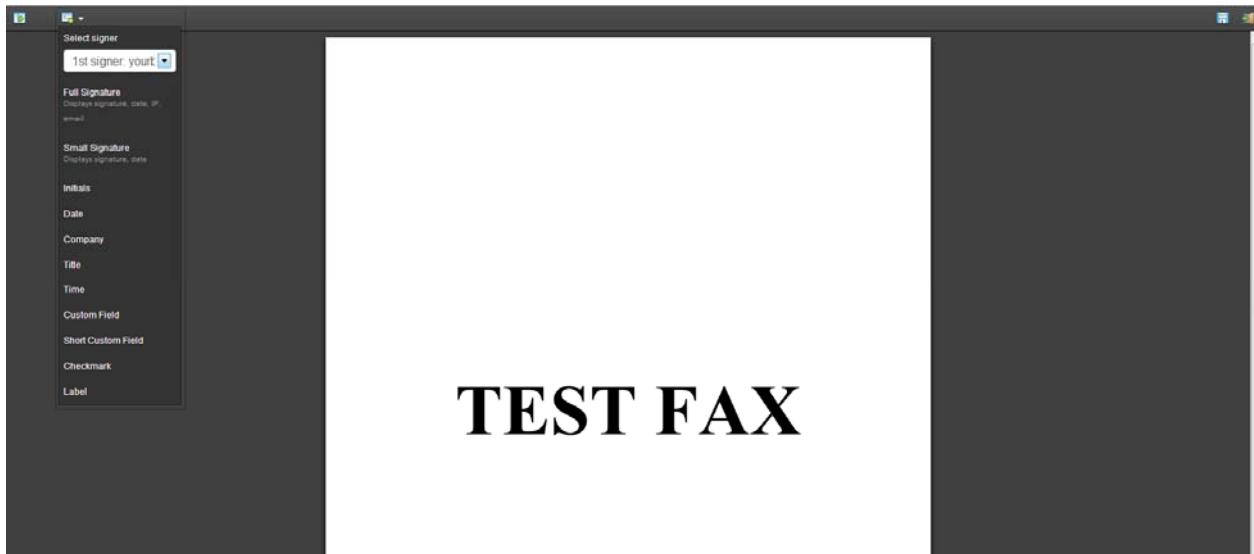
Signer	Type
yourbuyer@buyer.com	1st Signer
yourseller@seller.com	1st Signer
othersignerrequired@signer.com	1st Signer
yourselleragent@agency.com	1st Signer
yourbuyeragent@agency.com	1st Signer

Buttons at the bottom include 'Advanced Options', 'Invite Signers', 'View Signature Requests', and 'Return To Saved Forms'. A footer contains copyright information for formsRus.com.

Next click on “Add/Edit Signing Locations” and the document that you are going to locate the signatures on appears. In my case it is a simply one page document that says Test Fax as you can see below.



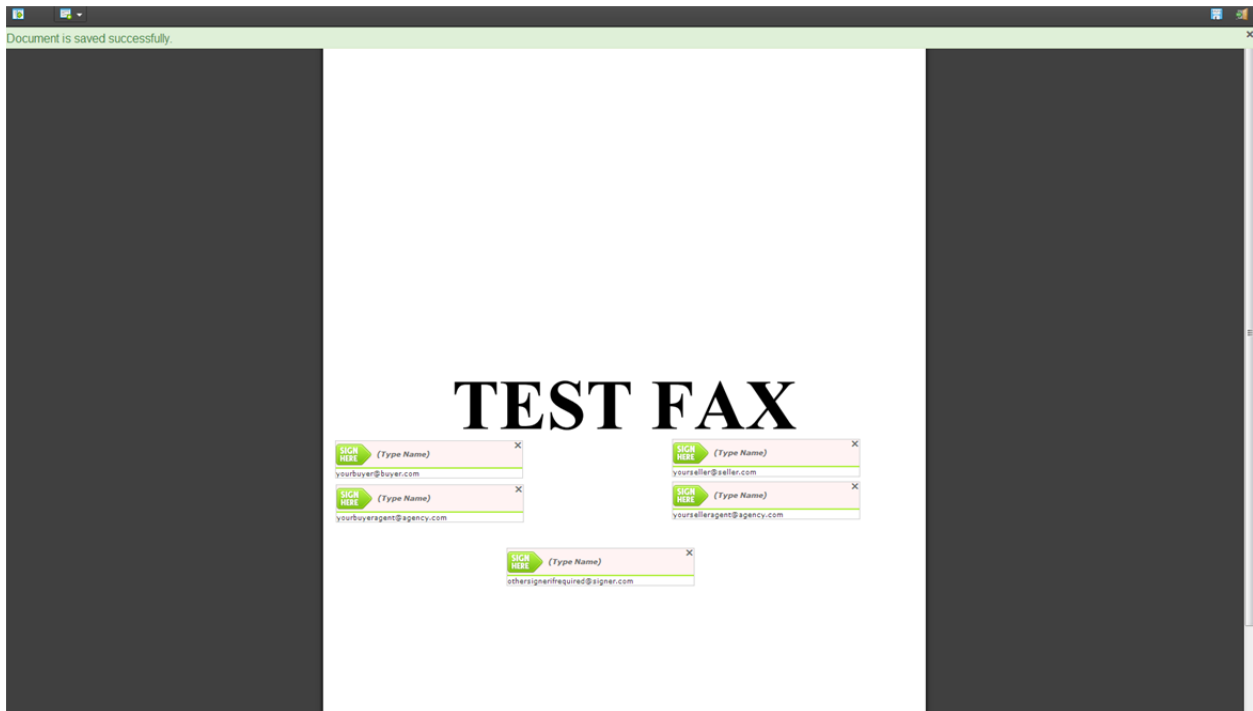
Now, click on the 2nd icon in the upper-left corner of the screen and you will see a pull-down menu with the options you need to customize the signature locations on your document for each of your required signers. (See below screenshot)



Everyone is a 1st signer, so first scroll to the page of your document that you wish to put a signature on. Next, click the 2nd icon to see your tools and click the pull-down list arrow to choose the signer that you wish to locate on that page. When you select the signer, select the type of signature block that you need to locate onto the document. This will normally be the “Full Signature” although you can choose

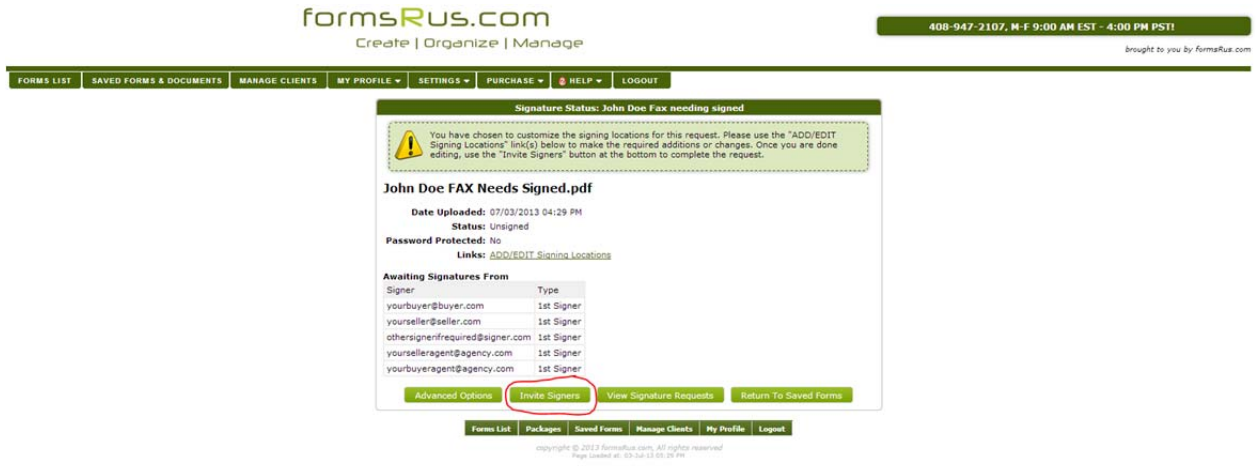
“Small Signature” for tight spaces or initials, etc. The signature block appears and you can then drag and drop it wherever you see fit on that page. Repeat this process for all required signers until you have located all of the signatures where you want them throughout your document. Once finished, click on the “Save” icon in the upper-right corner of the screen (blue disk icon) and you will get a green bar at the top that says “Document is saved successfully” as seen below. (Notice that I chose to locate my buyers on the left and my sellers on the right and the other signer in the center).

Wherever you locate each signature on your document for each signer is where they will see it when the document is emailed to them. They will only see their signature location and no one else’s. The Settware e-signing system will intuitively drive your signers directly to the correct spots and require them to e-sign or initial before allowing them to agree to the terms and submit the document.

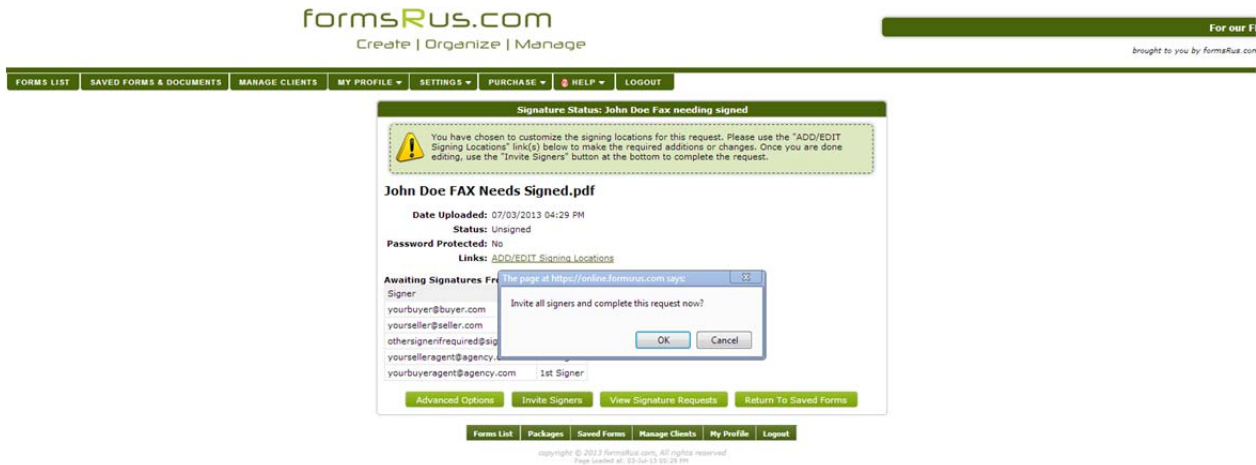


Next, click the Exit icon in the upper-right corner to return to the previous screen. If you have more documents listed that you are sending out for e-signatures, repeat the above process for each one of those documents and when finished locating all signatures on all documents (or verifying that signatures

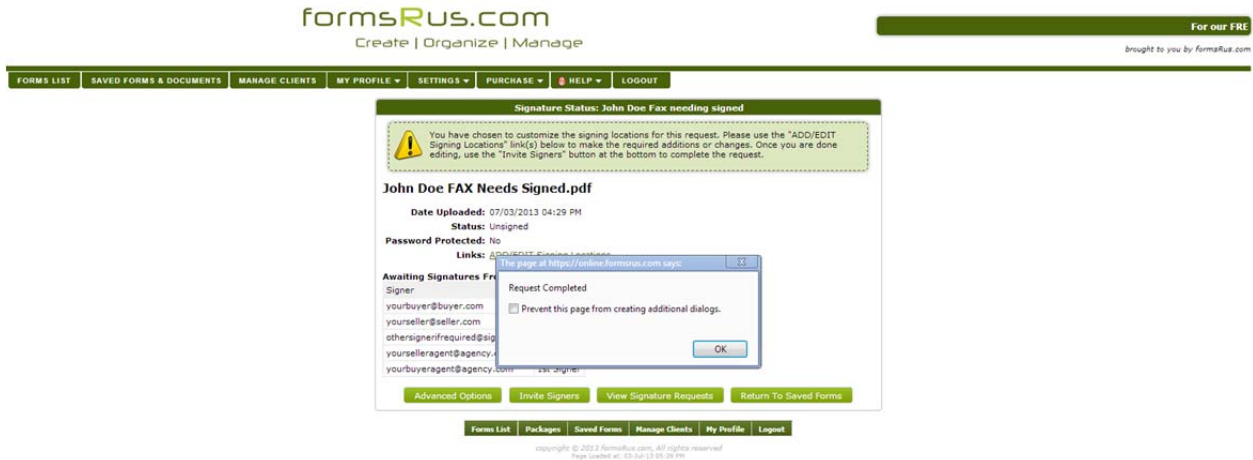
are in the correct locations on all of your documents) click on the “Invite Signers” button at the bottom as seen in the screen below.



Once you click on the “Invite Signers” button, the following screen appears asking you to “Invite all signers and complete this request now?”



Simply click on “OK” and you will receive a “Request Completed” confirmation page as seen in the screenshot below.



Click on “OK” to complete the signing request which sends out the document(s) via secure email for e-signature to all required signers.

The next screen you see is the same screen as we have shown before which is the current signature status of the document esigning submission that you just sent.

To view all of your signature requests, again simply click on “My Profile” and select “Signature Requests”. See the screenshot below and you now see two requests. The 1st request we sent earlier in this documentation as a “Default Signature Location” submission and the 2nd request we just sent after we “Customized” the signature locations and submitted.



We hope this document has helped you understand how to use our new built-in esigning service from Settleware.

If you still need further help, please contact us one of the following ways:

Send an email to support@formsRus.com

Call support at 800-955-6284 x3

-The formsRus.com support team