

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 is 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 with columns for Favorite, Open Form, Form No., and Description. The forms listed are 'Exclusive Right to Sell Agreement' and 'State Disclosure Form for Buyer and Seller'. Each row has 'New Form' and 'Auto Fill' buttons. A footer contains copyright information for 2013 formsRus.com.

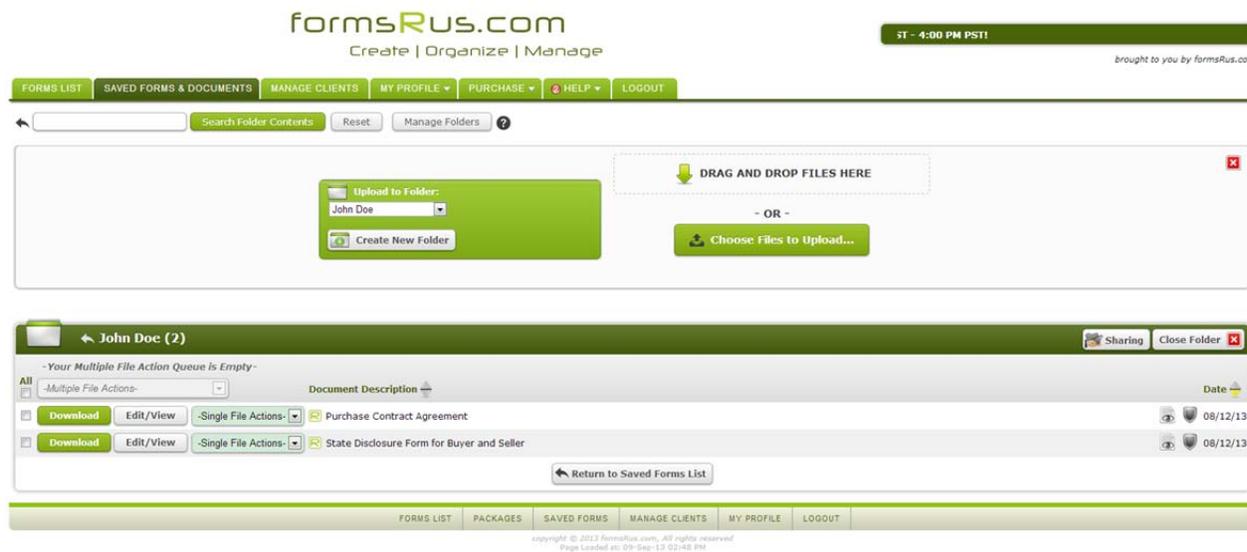
Once you have completed filling out and saving the form(s) that you wish to send out for e-signature, click on your "Saved Forms & Documents" tab and you will see a screen similar to the below image which contains the form(s) that you just saved. (Notice: I created a folder named John Doe and stored 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' dashboard. At the top, there is a navigation bar with tabs: FORMS LIST, SAVED FORMS & DOCUMENTS, MANAGE CLIENTS, MY PROFILE, PURCHASE, HELP, and LOGOUT. Below this, there is a search bar and a 'Manage Folders' button. The main area shows a folder structure with three folders: 'Default', 'John Doe', and 'New Folder'. A footer contains copyright information for 2013 formsRus.com.

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.



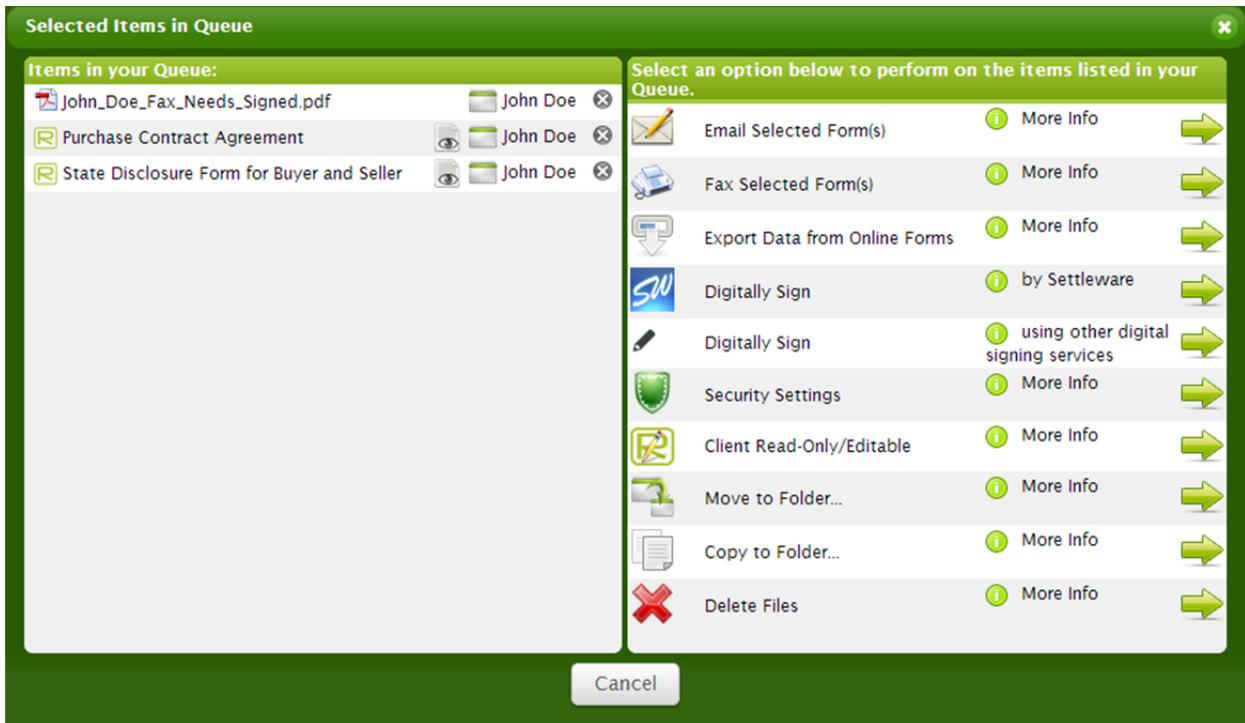
All browsers will allow the “Drag and Drop Files Here” method of uploading EXCEPT for Microsoft Internet Explorer version 9 and older. With older versions of IE, you’ll need to click on the “Choose Files to Upload” button and upload your files that way. In the screenshot below, I just uploaded a PDF 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.

Signature Request

7 of 8 free monthly Settleware e-Signing submissions remaining. Please subscribe to get unlimited eSignatures. [Subscribe Now](#)

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: *
Agent@Company.com

Request Title: *

* = Required Field

Signers

Signer 1 Email:

Signer 2 Email:

Signer 3 Email:

Signer 4 Email:

Additional Signer Emails:

One or more additional addresses. Comma separated

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, there are 4 different signer fields. If you have one signer, use the signer 1 field only, if you have two signers, use the signer 1 field and the signer 2 field only. Finally, if you have more than 4 signers, use all 4 signer fields and then add any other required signer email addresses in the “Additional Signer Emails” section separated by commas. See the screenshot below for a completed example.

At this point you are now ready to send these documents out for esigning! 😊

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: 123 Smith St. Contracts need signed

State Disclosure Form for Buyer and Seller

Date Uploaded: 08/12/2013 12:49 PM
Status: Unsigned
Password Protected: No
Links: [ADD/EDIT Signing Locations](#)

Awaiting Signatures From

Signer	Type
john.doe@gmail.com	1st Signer
jane.doe@gmail.com	1st Signer
sam.smith@gmail.com	1st Signer
sally.smith@gmail.com	1st Signer
othersigners@othersigners.com	1st Signer

Purchase Contract Agreement

Date Uploaded: 08/12/2013 12:49 PM
Status: Unsigned
Password Protected: No
Links: [ADD/EDIT Signing Locations](#)

Awaiting Signatures From

Signer	Type
john.doe@gmail.com	1st Signer
jane.doe@gmail.com	1st Signer
sam.smith@gmail.com	1st Signer
sally.smith@gmail.com	1st Signer
othersigners@othersigners.com	1st Signer

John Doe Fax Needs Signed.pdf

Date Uploaded: 08/12/2013 12:49 PM
Status: Unsigned
Password Protected: No
Links: [ADD/EDIT Signing Locations](#)

Awaiting Signatures From

Signer	Type
john.doe@gmail.com	1st Signer
jane.doe@gmail.com	1st Signer
sam.smith@gmail.com	1st Signer
sally.smith@gmail.com	1st Signer
othersigners@othersigners.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 **Settlement account to easily e-sign your documents**)*

Hello john.doe@johndoe.com,

Welcome to the formsRus.com eSignature Program.

A member of formsRus.com has prepared documents titled "123 Smith St. Contracts need signed" 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 the creator of this agreement at this address: testuser@myassociation.com

Thank you for using formsRus.com

At this point, simply click on the green button in the lower-right portion of the screen labeled "Return to Saved Forms".

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.

The screenshot displays the formsRus.com user interface. At the top, the logo "formsRus.com" and tagline "Create | Organize | Manage" are visible. A navigation bar contains tabs: FORMS LIST, SAVED FORMS & DOCUMENTS, MANAGE CLIENTS, MY PROFILE (selected), PURCHASE, HELP, and LOGOUT. A green banner at the top right reads "For our FREE tech support please, CALL 408-947-21" and "brought to you by formsRus.com". Below the navigation bar, a table lists signature requests:

Request Title	Date	
123 Smith St. Contracts need signed	08/12/2013	View Status

At the bottom of the screenshot, there is a footer with copyright information: "copyright © 2013 formsRus.com. All rights reserved. Page loaded at: 12-Aug-13 12:00 AM".

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.

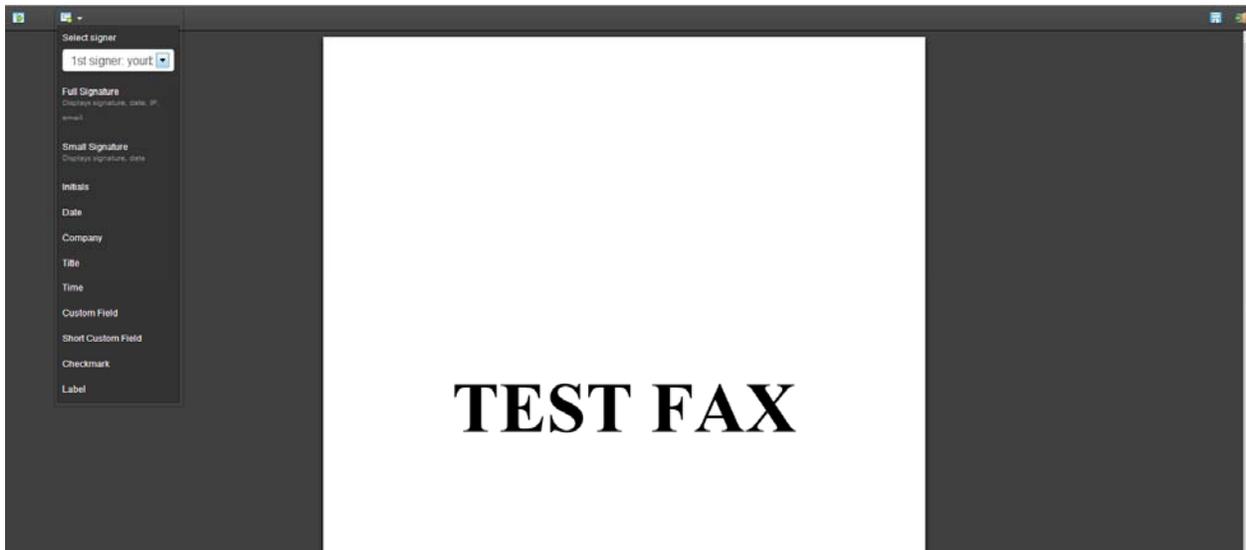
The other option is the “Submit and Customize Signing Locations” button. This is how you can drag and drop the signature locations wherever you want them located on the document. If you click that button, the following screen appears. **** Note that I only submitted the uploaded fax document for this demonstration ****

The screenshot shows the formsRus.com interface. At the top, the logo 'formsRus.com' is displayed with the tagline 'Create | Organize | Manage'. A green navigation bar contains links for 'FORMS LIST', 'SAVED FORMS & DOCUMENTS', 'MANAGE CLIENTS', 'MY PROFILE', 'SETTINGS', 'PURCHASE', 'HELP', and 'LOGOUT'. The main content area is titled 'Signature Status: John Doe Fax needing signed'. A yellow warning icon is present with the text: 'You have chosen to customize the signing locations for this request. Please use the "ADD/EDIT Signing Locations" link(s) below to make the required additions or changes. Once you are done editing, use the "Invite Signers" button at the bottom to complete the request.' Below this, the document title is 'John Doe FAX Needs Signed.pdf'. Details include 'Date Uploaded: 07/03/2013 04:29 PM', 'Status: Unsigned', and 'Password Protected: No'. A link 'ADD/EDIT Signing Locations' is provided. A table lists 'Awaiting Signatures From' with columns for 'Signer' and 'Type'. The table contains five rows, each with an email address and '1st Signer'. At the bottom, there are four buttons: 'Advanced Options', 'Invite Signers', 'View Signature Requests', and 'Return To Saved Forms'. A footer contains copyright information and a page load time.

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.



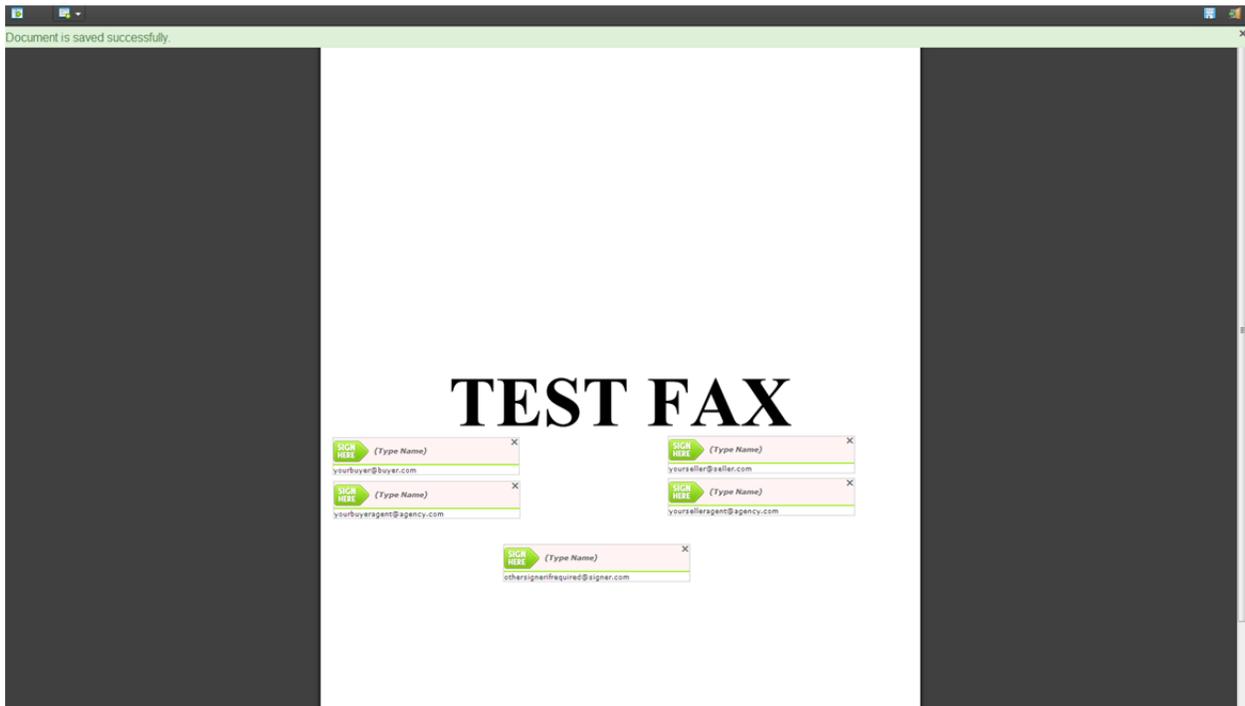
Now, click on the 2nd icon in the upper-left corner of the screen and you will see a pull-down menu with the options you need to customize the signature locations on your document for each of your required signers. (See below screenshot)



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

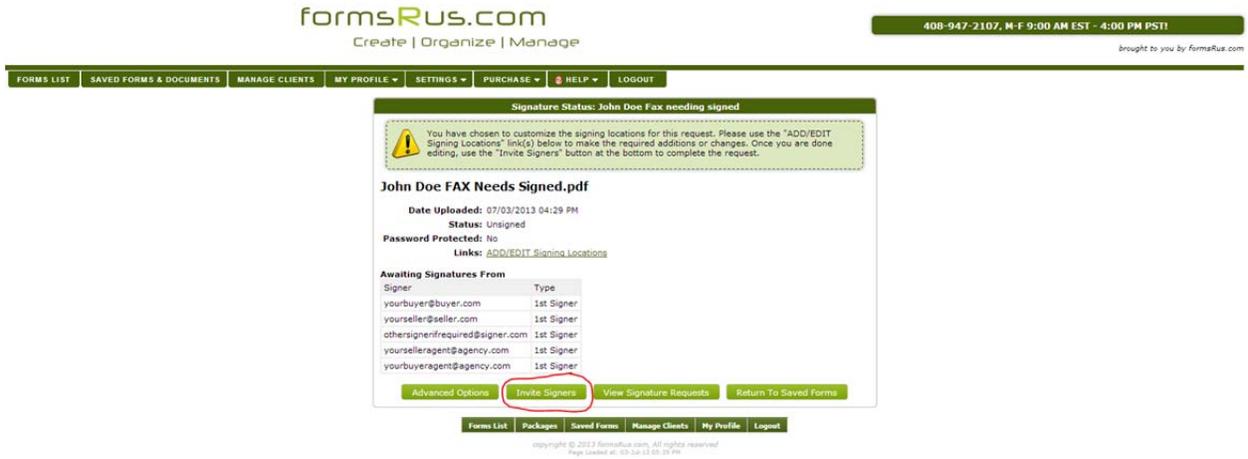
“Small Signature” for tight spaces or initials, etc. The signature block appears and you can then drag and drop it wherever you see fit on that page. Repeat this process for all required signers until you have located all of the signatures where you want them throughout your document. Once finished, 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