Authentisign

Electronic Signature Service

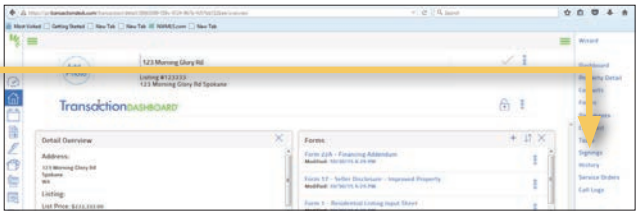
Create an Electronic Signing

Authentisign provides a 4-step "Wizard" to guide you through each step of creating an electronic signing. The "Wizard" will assist you in naming your signing, adding participants, uploading forms and transaction documents, adding or confirming the placement of signature/initial blocks, and sending the documents to the participants to be signed, in the order of your choosing.

Access Authentisign

- Click "Signings" on the menu from your transaction.

  Note: Please see the Transaction Desk user guides for details on creating transactions.



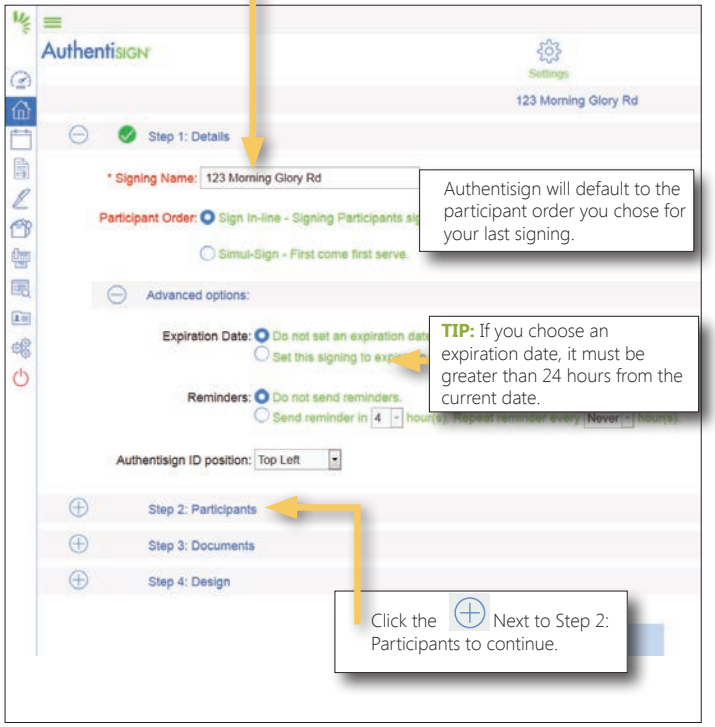
- Click "Add" on the menu from your transaction to start the 4-step Wizard.

Step 1: Edit Setup

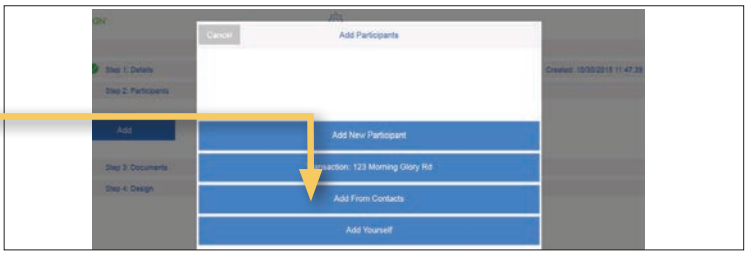
- **Review the name of your signing transaction and edit if desired.**

- **Select the "Participant Order"**
  - Sign In-Line: Signing Participants will receive access to sign the documents in the order chosen in Step 2.
  - Simul-Sign: All Signing Participants will have the ability to immediately sign/review the documents once the invitation is sent (no particular order will be applied.

- **Click the ⊕ icon next to "Advanced Options" to add a signing order or expiration date.** (Not required fields)
  - Expiration Date: This feature allows you to enter a date for the signing transaction to become unavailable to the participants.
  - Reminders: This feature will send email reminders to the signing participants if they do not sign the documents with in the time period you choose.



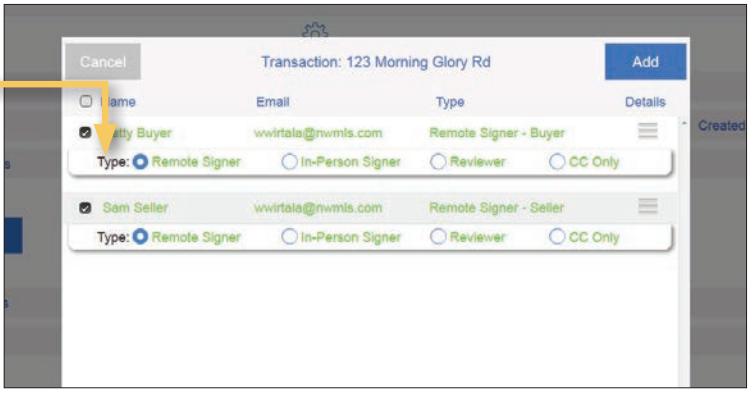
Step 2: Select Participants



Click "Add" and then click the Transaction Name to add the participant(s) from your transaction information.

You can also add a new contact, a saved contact, or yourself by clicking on one of the other links.

Check the boxes next to the participant's name you would like to include in the signing.



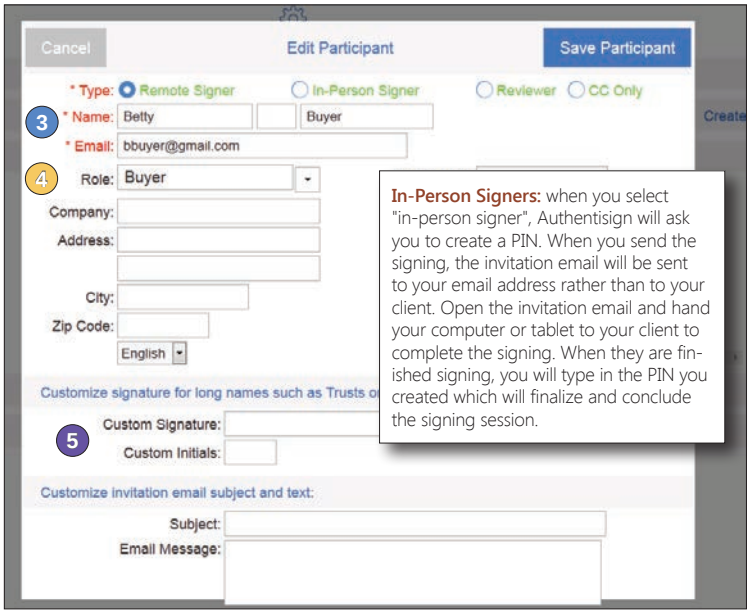
Verify Participant Type

- Remote Signer: Participant will sign the documents from their own computer or device (e.g., Buyer or Seller)
- In-Person Signer: Participant is with you and will be signing using your computer or device
- Reviewer: Participant will review the documents (e.g., Broker or Lawyer)
- CC Only: Participant will receive a copy of the signed documents (e.g., Listing or Selling Firm)

Set Participant Order and Edit Participant Information

1. Set Participant Order - Click the arrows to choose the order in which the signing will occur for the participants. The documents will be auto-routed by Authentisign as each participant signs or reviews. If you would like to set the signing/reviewing order of the participants and do not see the "Order" column, return to Step 1, open "Advanced Options", and choose "Sign In-Line".

2. Edit Participant Information - Click on the ⓘ icon to open the Edit Participant page.



3. Review Name and Email Address.
   These are required fields and must be completed before you can continue to Step 3.

4. Verfiy Participant Role:
   This selection is critical. The participant type affects where the signature blocks are pre-placed, e.g., choosing buyer as the participant type will place the signature blocks where the buyer should sign the forms.

5. Customize Signature (Optional):
   Enter a custom signature and initials if the signer has a long name or if the documents will be signed by a trustee or corporation, e.g., "John Smith, Trustee" with custom initials "JAT".

Click the ⊕ icon next to "Step 3: Documents" to continue.

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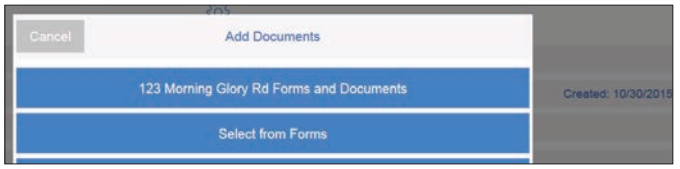
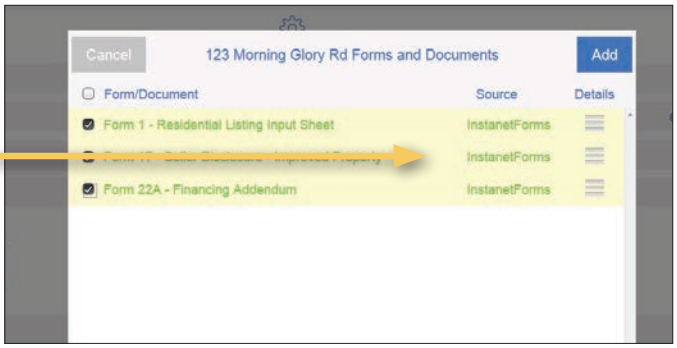
Step 3: Select Forms and Documents

Select the Transaction Name to choose the transaction forms and documents

Check the box next to the forms and documents you would like to include, and then click "Add".

Filled in forms will be labeled "InstanetForms" and scanned forms or other transaction documents will be labelled "DoxBox".



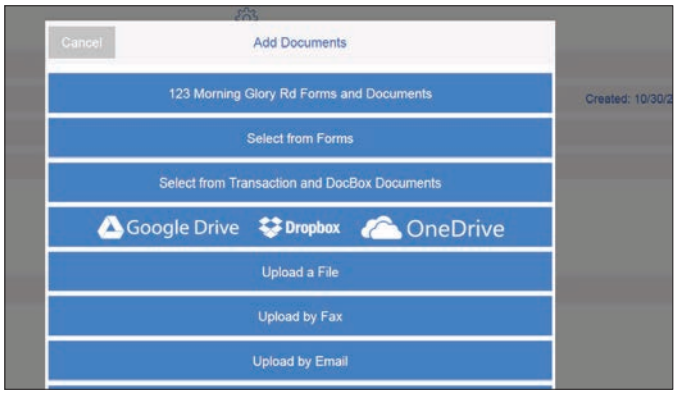


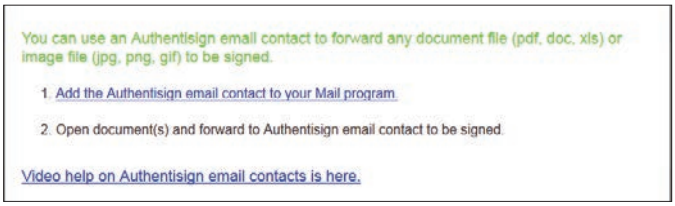
If you would like to add additional documents to your signing that you did not previously include in your transaction, you can:

- Upload a file from your computer
- Upload a Transaction Desk Form
- Upload a Document saved in Transaction Desk
  Tip: This is a great way to add company checklists and forms to your transaction
- Upload bu Email - There are Two Options:

  1) Add the Authentisign email address as a contact to your device. This will allow you to forward documents to the Authentisign email address to upload to this signing (Note: each signing will have its own Authentisign email address and will have to be saved separately).

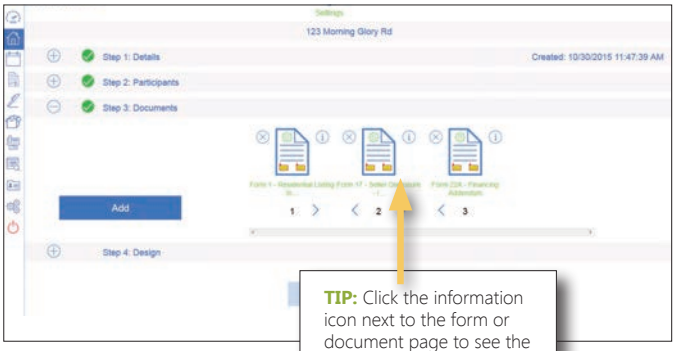
  2) Click the lower link to open up your default email program that will be auto-filled with the Authentisign email address. Simply attach the documents and send the email to upload the documents to the signing.





Click the arrows to change to order of the forms or documents you have uploaded to the signing.

Click the ⊕ next to "Step 4: Design" to continue.

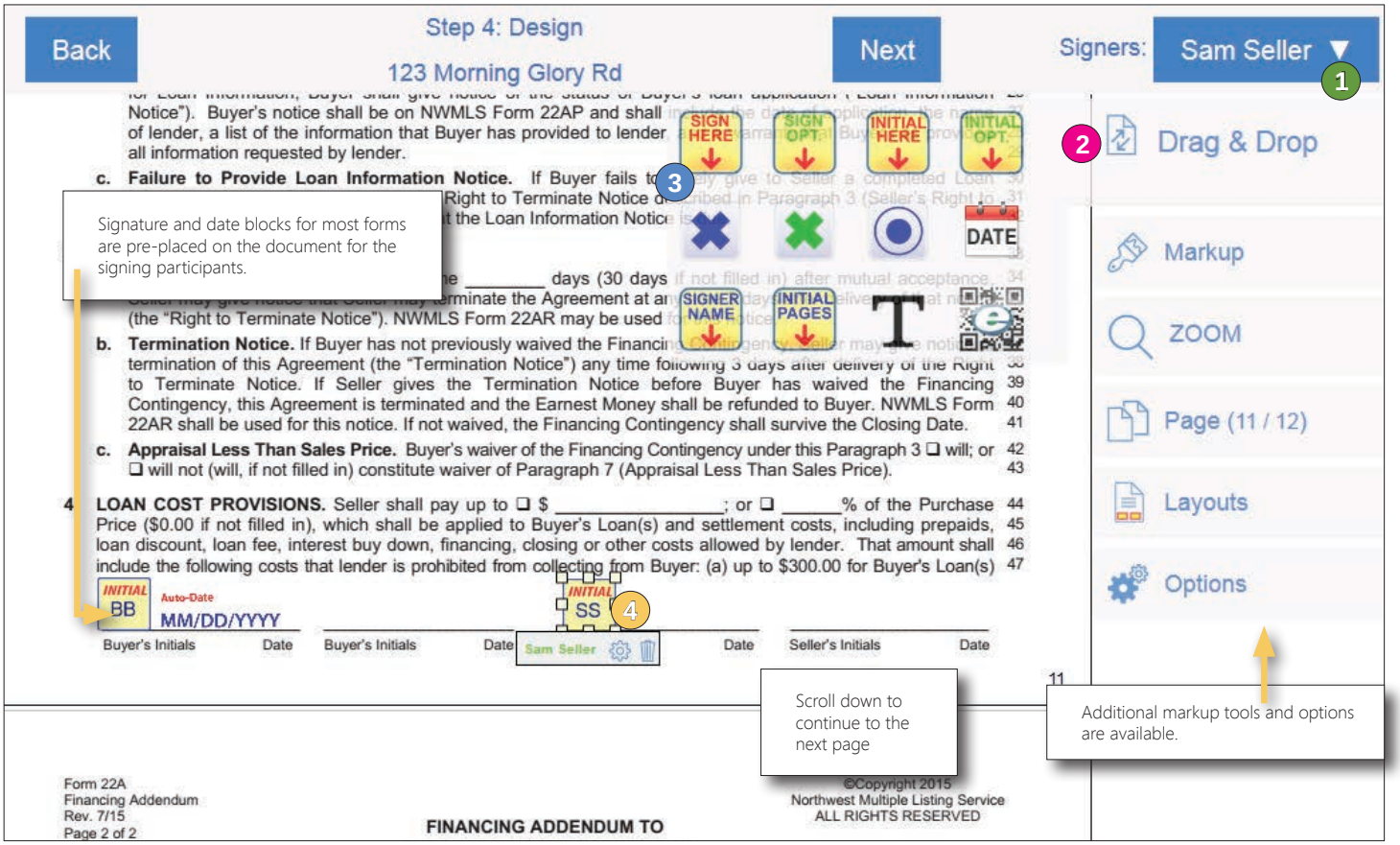


Step 4: Design

Prepare your forms

- Verify the signature, initial and date blocks are correctly placed on every page for each signer.
- Make sure the fill-in field data is showing and the information is correct.
- Add additional signature, initial and date blocks to documents if needed.
  1. Choose the signer's name from the drop down in the upper right to view a list of all signers. Select the appropriate signer to add a block for their name.
  2. Tap the "Drag & Drop" option to open the available signature and initial blocks.
  3. Drag the block of your choice into position on the form.
  4. Hold your finger on top of a signature block and select the gear icon to customize the direction and add a date block.

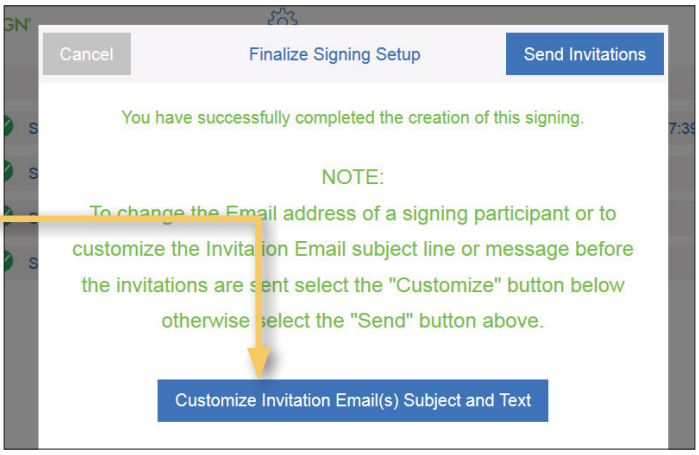
Click "Next" to Finalize and Send Invitations.



Finalize and Send

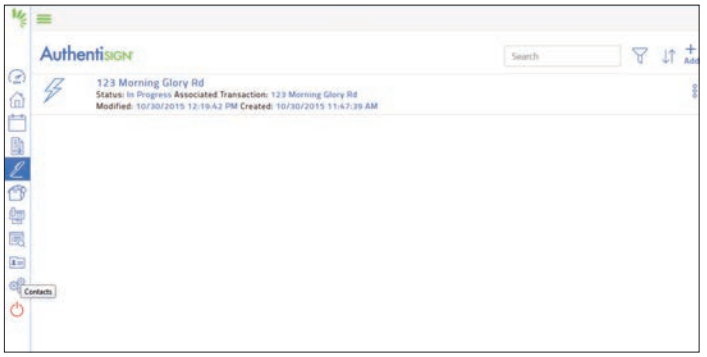
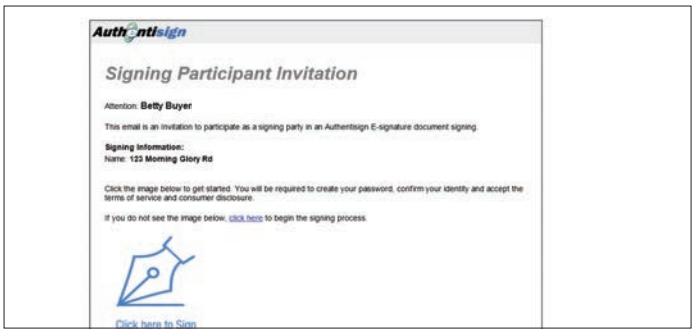
Click "Send Invitations" to send the invitations to your participants.

Note: Click the "Customize" button to create a custom subject line and message for your signers.



Congratulations! Your signing transaction has been routed to the participants for signing/reviewing.

- The signing status is now available on your Authentisign home page. Please view the *Track my Signing* user guide to learn about Authentisign's advanced tracking tools, including a dashboard and email notifications.



- The participants will receive an email invitation, allowing them to create a password to view and sign the documents online. Please view the *Signing Electronically* user guide for screen shots of the signing process.