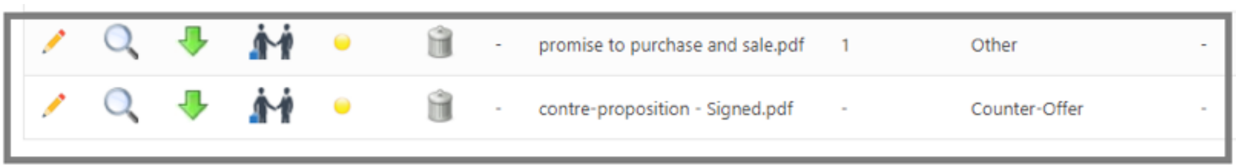
HOW TO CREATE AN E-SIGNATURE REQUEST

1. Go to your profile and set up the email you would like to use for the e-signature. This is under: Profile > NexoneSign Email.

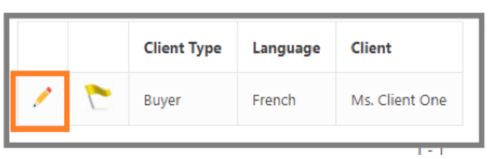
2. Create a listing or Transaction File or select a file that is already created.

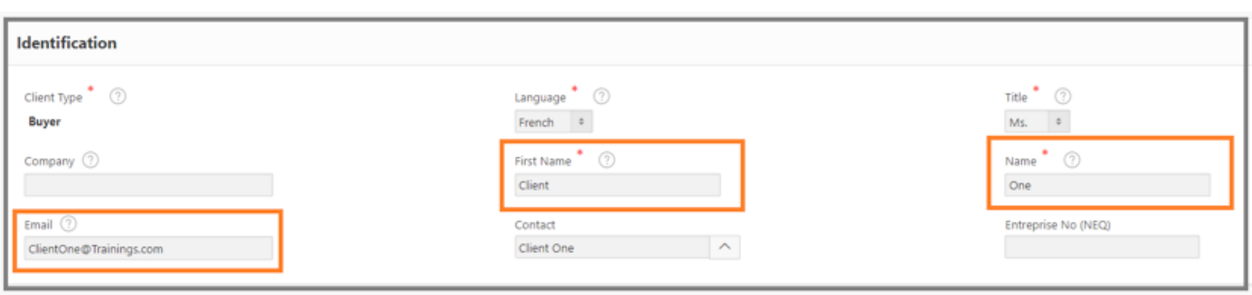
3. Upload the documents you would like to get signed, confirm documents have been uploaded.



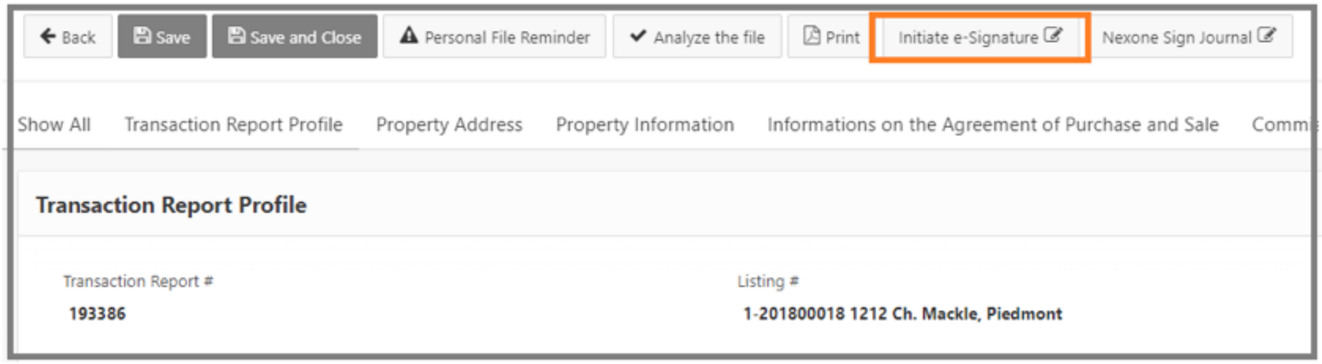
4. Make sure your client's information is filled out with the mandatory fields, Firstname, Last name and email address.

To make sure all your clients have the required information, click on the little pencil next to your client's information.

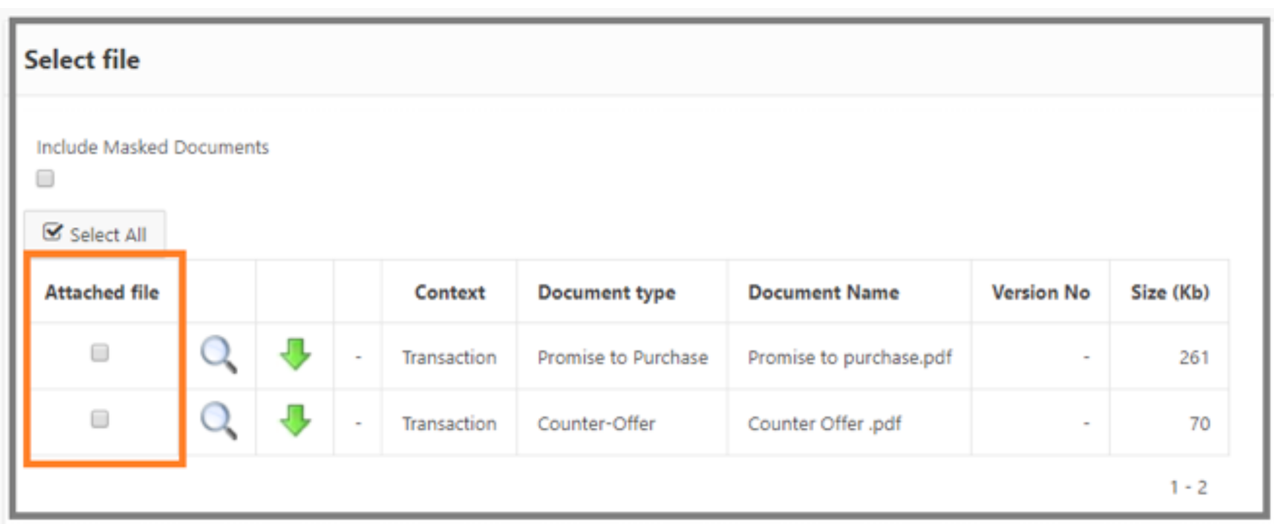




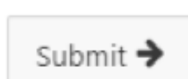
5. Once you have created your listing or transaction Report in GimmiWeb, and uploaded your documents, click on initiate e-Signature.



6. After clicking on Initiate signature request, you need to select the documents you would like to have available in the signing session.

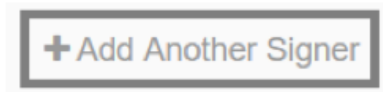


7. After selecting the documents, click on submit found at the top left-hand corner.

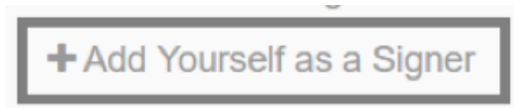


Note: Disable your pop-up or ad-blocker prior to adding a signature request. The pop-up blocker will prevent the new tab from opening.

8. After clicking the submit button, a new window should open. Your clients added to your file on GimmiWeb, should automatically appear within your signing session. If you would like to add another signer, click on:

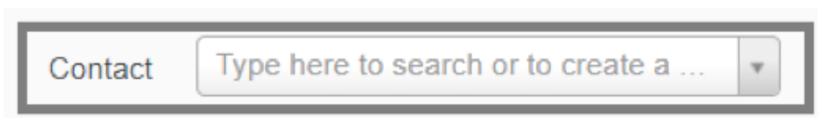


9. If you need to sign the documents click on:

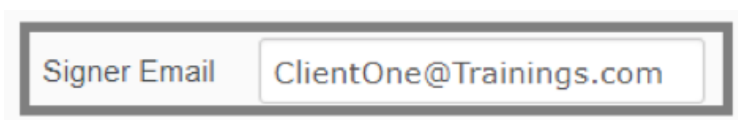


Note: Do not add yourself as a signer if you do not need to sign the documents. You will always receive a copy of the completed documents in your email. The complete documents will be uploaded to your account as well.

10. Contact: Select your client from a drop-down menu of contacts added to previous signature requests. Selecting a contact from the drop-down menu will add all the information necessary for that contact (ie: first name, last name,email).

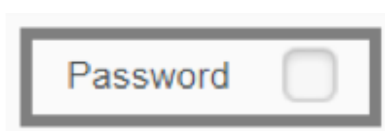


11. Signer Email: Is the email that the signature request will be sent to.

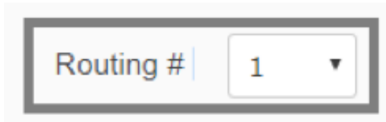


TIP: More than one client can share the same email address for signing. It is re commended to change the Routing # to avoid confusion.

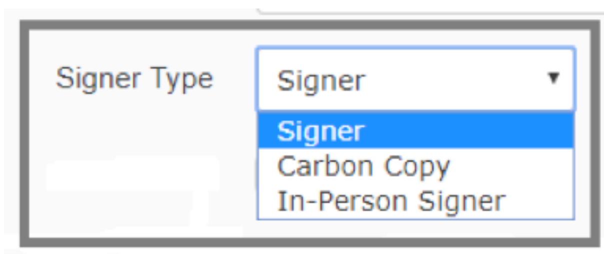
12. If Clients are using the same email, we recommend setting a password. This ensures that each client is actually signing for themselves.



13. Routing #: is the order that you want your client to receive the signature request. For example: Client one is set to routing # 1 and client two is set to routing #2. Client two will only receive the documents to sign once client one has completed signing all documents.



14. ***Signer Type: is a drop-down menu to select the type of signing for each client.***
Signer: Your Client will access the signing session via their email inbox.
Carbon Copy: Your Client will receive a copy of the signed documents only once the signature package is completed.
In-Person Signer: Your Client would like to sign in person, through tablet, phone, computer with the agent. This option allows your client to sign through your account.



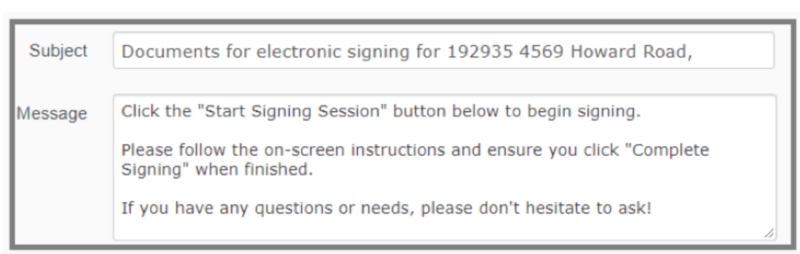
15. Confirm all contacts have been added to the signature request, then click on next.

16. This will bring you to the email message which is sent to your clients.

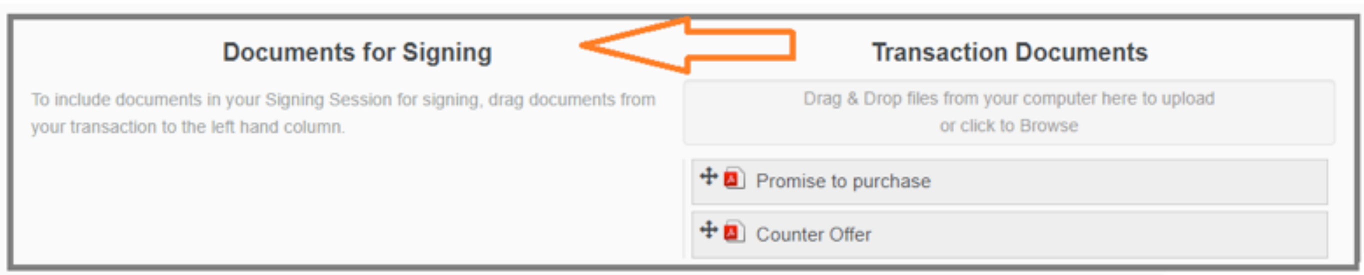
The Subject: is the subject line of the email sent to your client.

Note: The subject is also the package name for this signature request. Each Request sent out for this file will have the same package name if not changed.

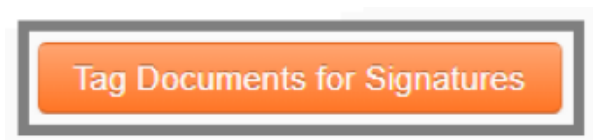
The message: Is the message that will be sent out to your clients. Feel free to edit this message, but it does contain instructions on signing.



17. The next step is selecting the documents that need to be signed. If you have missed uploading a document to your transaction/listing file, you can upload it at this step. To upload a document directly to this page you can click on or drag and drop:



18. After confirming the documents that need to be signed, click on tag documents for signatures at the bottom right corner.



19. After clicking on the tag documents for signatures, you will be directed to the tagging page to edit your documents and place your client's signature and/or initial tags.

20. To Strike through text on your documents, you can drag and drop the strike though option at the top:

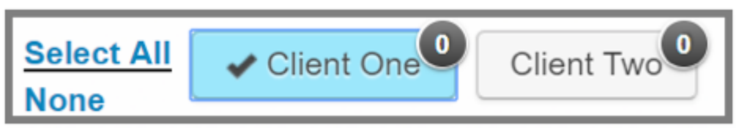
Place the strike-through over the information you would like to change. To make the line longer or shorter, drag the box to the right side of the line to the left or right:

Note: it is recommended that revisions are made prior to placing any signatures.

21. To add text to your document, you need to drag and drop the Text Field option at the top:

Place the text feild box where you would like to make your changes and then click in the box to be able to type. To resize the tag, click & drag the white box in the top corner.

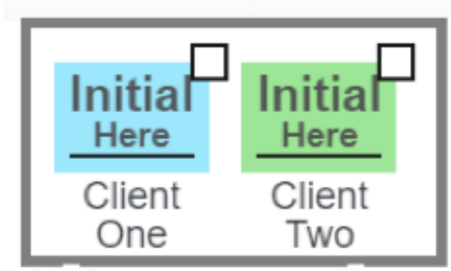
You can assign a text field to a signer, allowing them to fill in the assigned text field. Select the signer you would like to have write within the text field.



Then place the text field tag. The name of the signer underneath the text field box indicates the this text field is assigned to the signer.

22. Once all modifications are made on the documents, you can then start placing your signatures/initials. At the top of the screen select the clients you would like to place signatures/initials for.

More than one signer can be selected at a time. Use the Multi tagging feature to place signatures/initial tags, for each client selected.



23. Place the Date and Time tag to automatically populate the tag placement with the date and time from your client device. For Quebec users, the date and time is automatically populated under the signatures tag.

24. To remove a text field or signature/initial, drag and drop it off the document.

25. Once you are done placing all the signature and are ready to send out the request, click on send at the top.