NEXONE

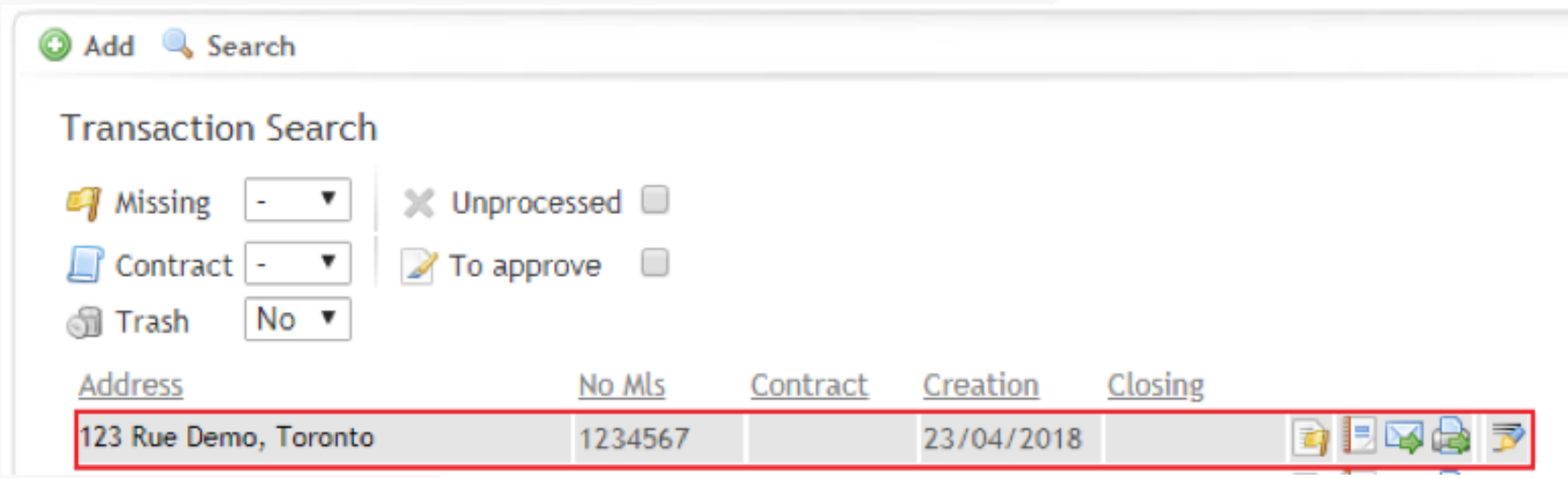
SIGN

NEXONE SIGN

This is a reference document for your navigation in the interface of NEXONE SIGN.

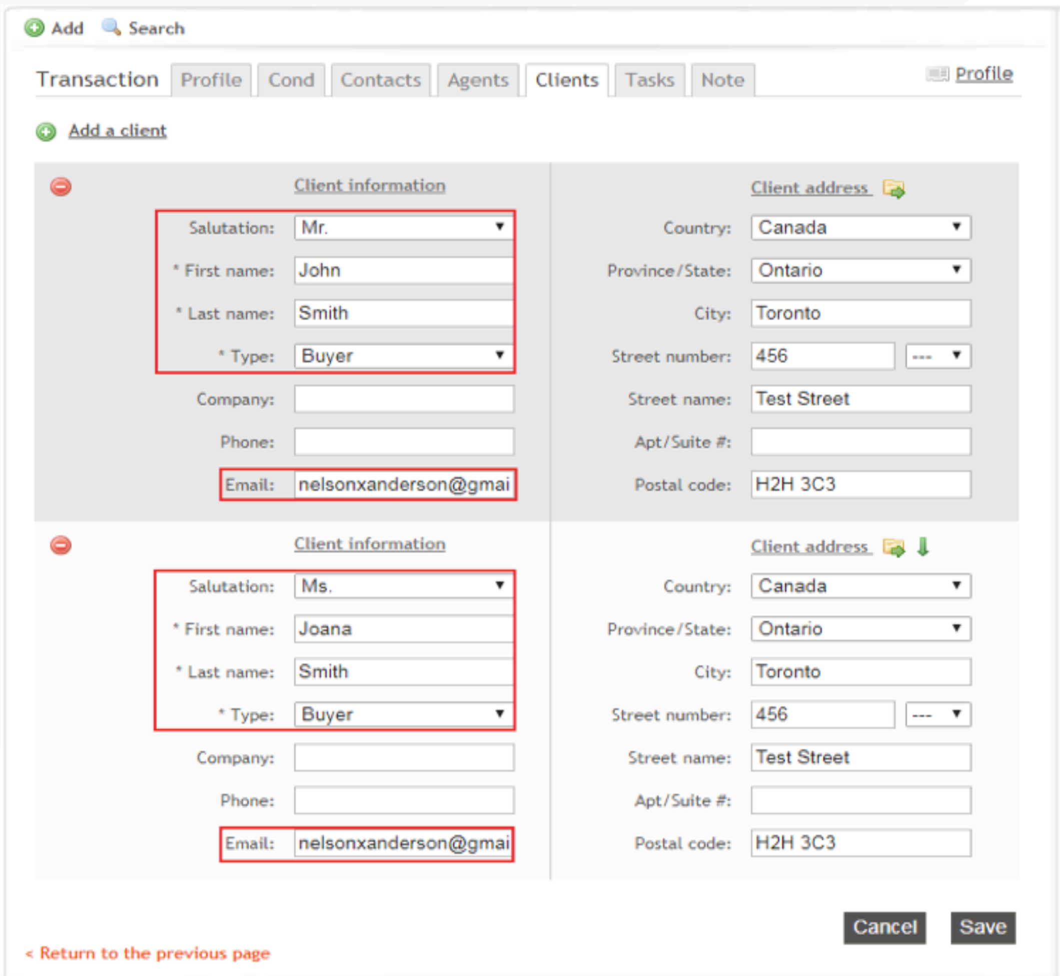
STEP 1

Create a listing or transaction file.



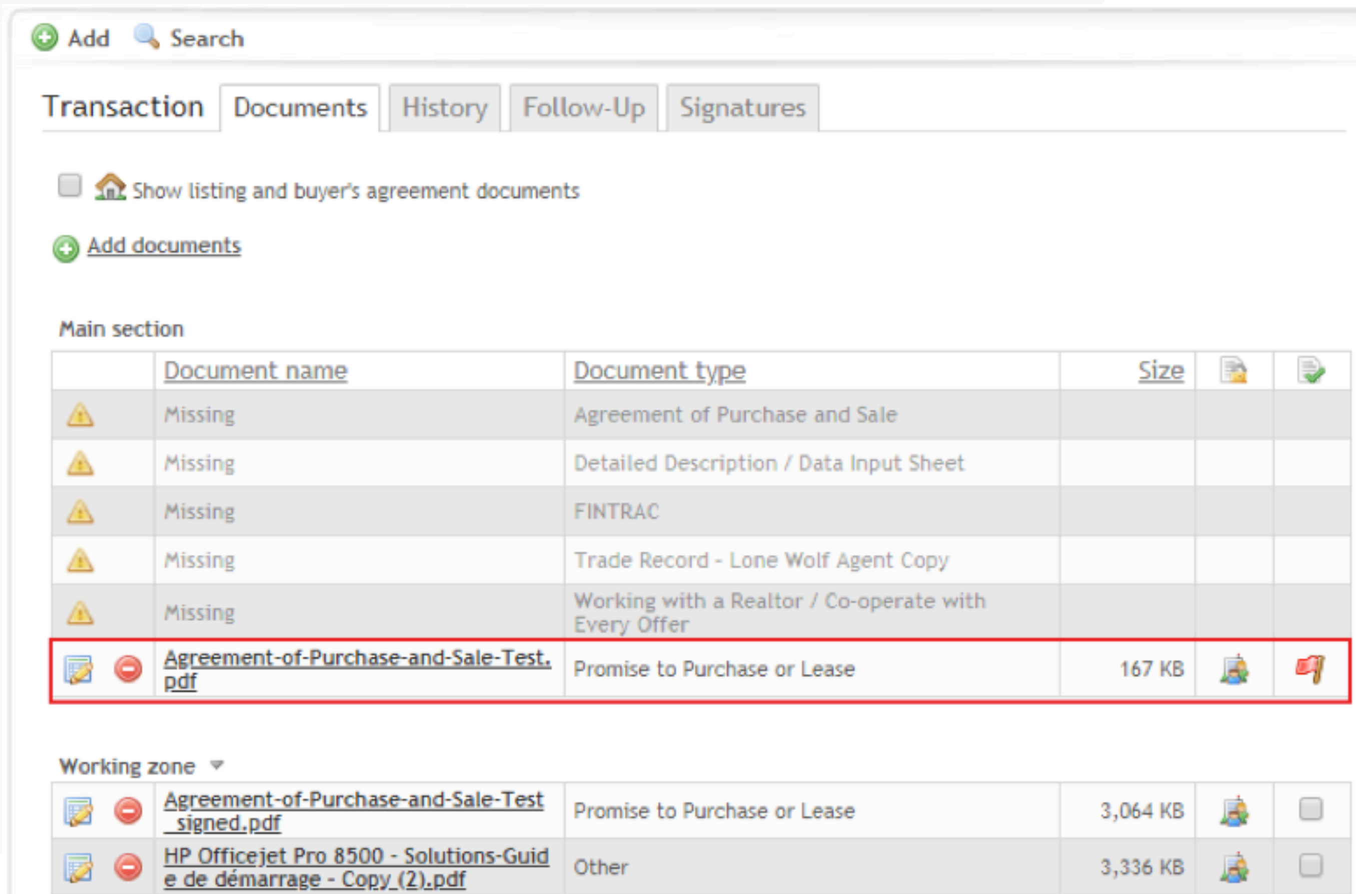
STEP 2

Add your client's information, make sure to fill the required fields.



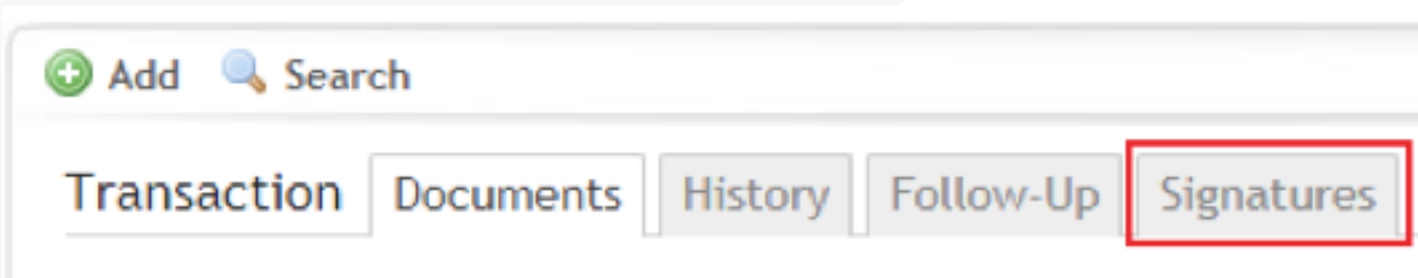
STEP 3

Add your documents to sign by clicking on the **"Add Documents"** button.



STEP 4

Once you have created a Listing or Transaction in Nexone, and have added your documents, click on the Signatures Tab.



STEP 5

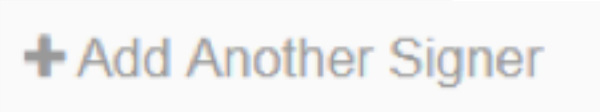
In the Signatures area, click on **"Add signature request"**:

This will open a new web page.

Note: Disable your pop-up or add blocker before adding a signature request. The pop-up blocker will prevent the opening of the new page.

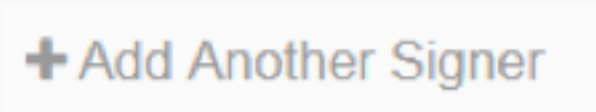
STEP 6

The first step allows you to select and confirm the signer's information. If you want to add another signer, click on:



STEP 7

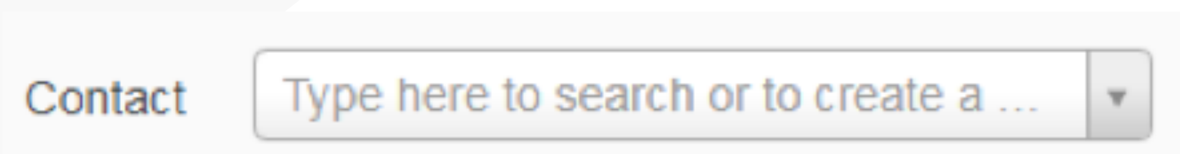
If you must also sign the documents by yourself, you should click on:



Note: Do not add yourself as a signer if you do not need to sign the document. By default, you will always receive a copy of the signed documents by email. In addition, once the signing session is complete, the signed documents will also be automatically added to the folder from which you have created your signature request.

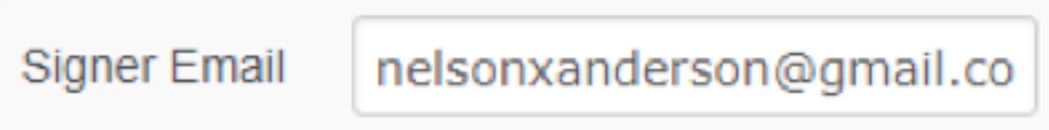
STEP 8

Contact: Select your customer from the drop-down menu of contacts added to previous signature requests. By selecting a contact from the drop-down menu, you will be able to automatically add all the necessary information of this contact (eg: First name, last name, email, etc.).



STEP 9

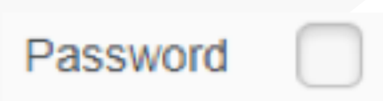
Signer Email: This is the e-mail to which the signature request will be sent.



Tip: More than one customer can share the same email address for signing. It is recommended to change the routing number to avoid confusion.

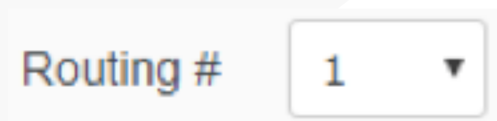
STEP 10

If customers use the same email address, for security reasons, we recommend that you set a **password**. This ensures that each client is signing for himself.



STEP 11

Routing #: Is the order in which you want your clients to receive the signature request. For example: The first client is set to routing # 1 and the second client is to routing # 2. Client 2 will receive the documents to be signed only once Client 1 has completed his signature request.



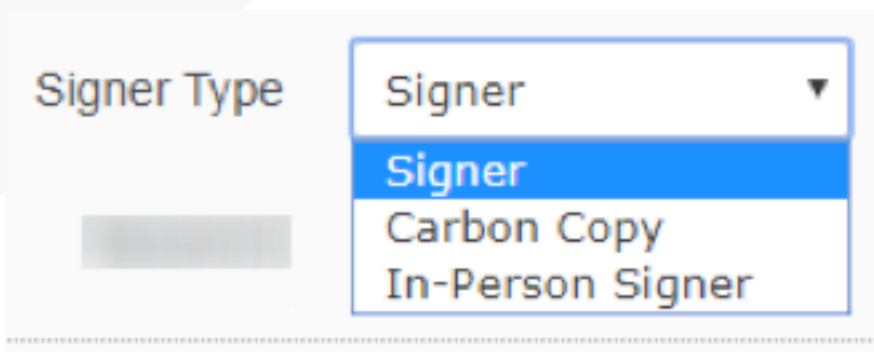
STEP 12

Signer Type: Is a drop-down menu allowing you to select the type of signer for each client. There are 3 types of signers:

Signer: Your client accesses the signing session via their email inbox.

Carbon Copy: Your client will receive a copy of the signed documents once the signature request has been completed.

Sign in person: If your client wants to sign in person, via tablet, smartphone or computer, with the presence of the broker. This option allows your customer to sign directly through your Nexone account.



STEP 13

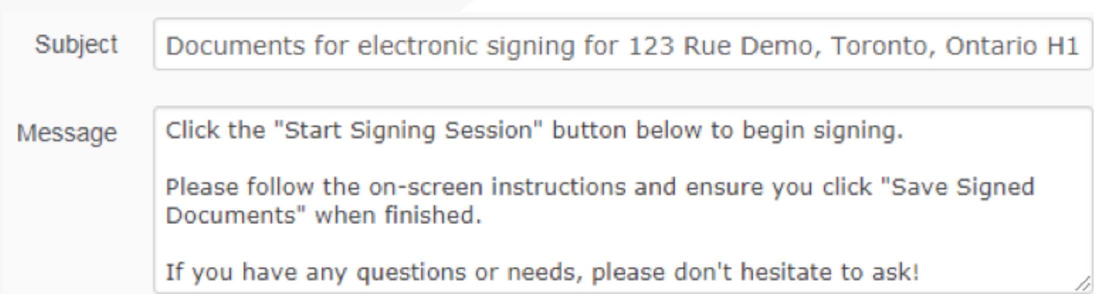
Make sure that all contacts in the signing request have been added, and then click Next.

STEP 14

By clicking “Next”, this will lead you to the email to be sent your customers.

Note: The subject is also the name of the signature request. Each request sent for a given folder will have the same query name, if it is not modified.

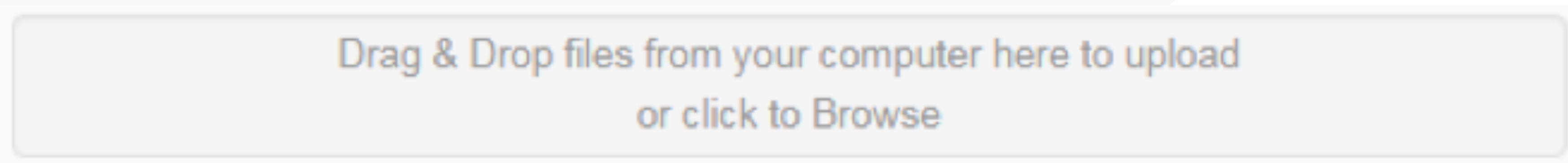
Message: This is the message that will be sent to your customers. By default, it contains instructions on signing procedures. Feel free to modify / personalize this message if needed.



Note: The content of the email will include your contact information such as your name, phone number and email address.

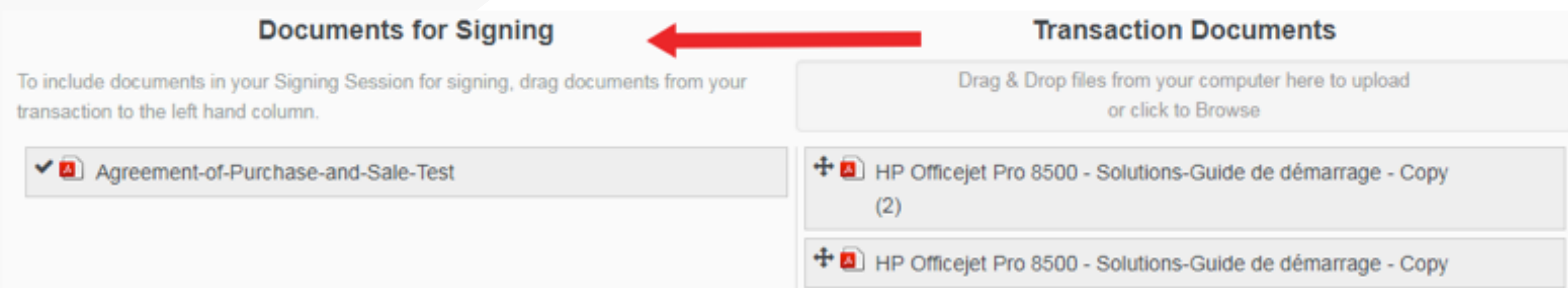
STEP 15

The next step is to select the documents to sign. If you forgot to add a document to your Transaction/Listing file, you can add it in this step.
To download a document directly on this page, you can click on the gray area or drag and drop the document:



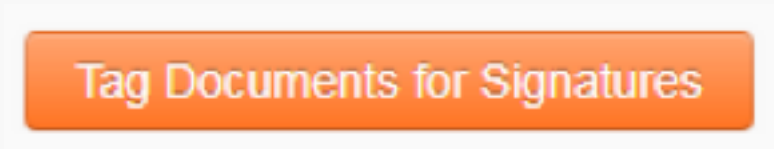
STEP 16

Select your documents to sign by dragging your documents from the **"Transaction Documents"** column into the **"Documents for Signing"** column.



STEP 17

After selecting the documents to be signed, click on **"Tag Documents for Signatures"** in the lower right corner.



STEP 18

After clicking on **"Tag Documents for Signatures"**, you will be redirected to the Ratify tagging page. You will be able to edit your documents and place your signatures and/or initials boxes for your customers to sign.

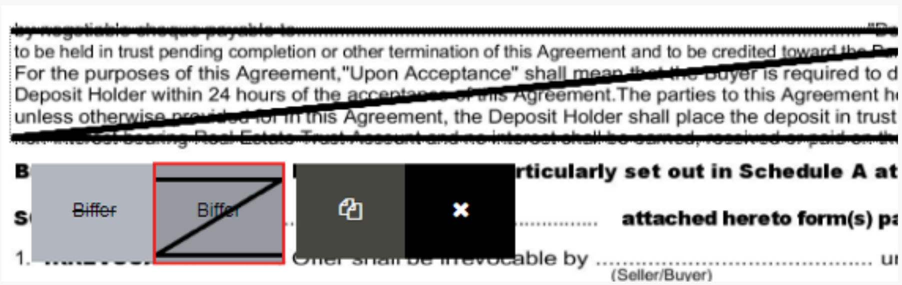
STEP 19

To strikethrough text on your documents, you must drag and drop the " strikethrough " box in the top of your document:

Place the "strikethrough" on the information you would like to change. To adjust the longer or shorter line, drag the small white box on the right side of the line to the right or left:

STEP 19

You also have the option to delete in a "Z" shape in order to cross off a whole paragraph:

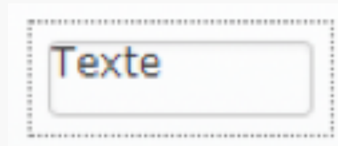


Note: Revisions are recommended before placing signatures/initials.

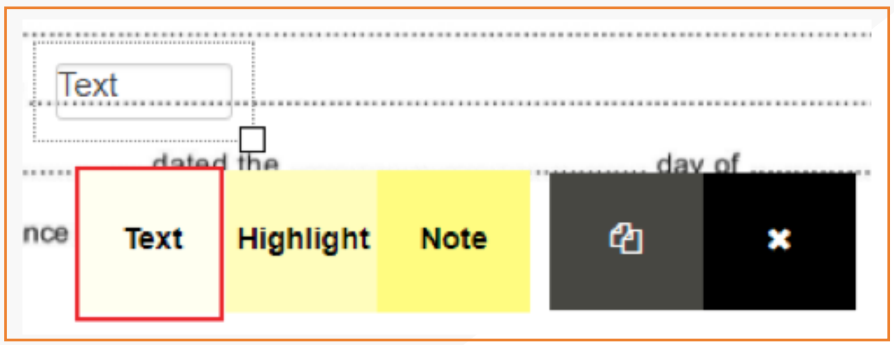
To remove a tag, you can drag & drop it outside of the document or simply click on the (x):

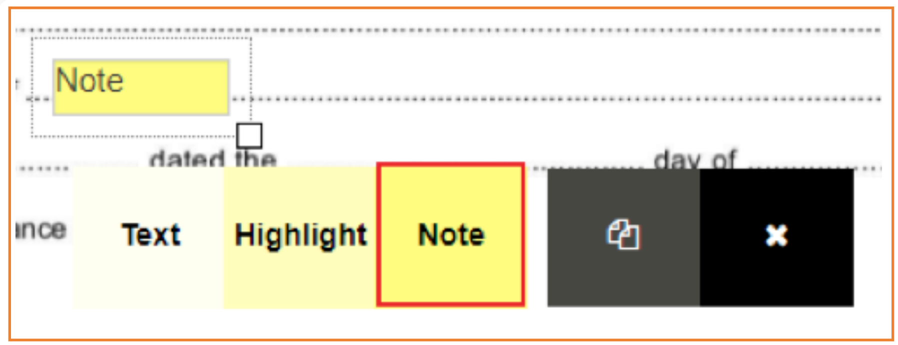
STEP 20

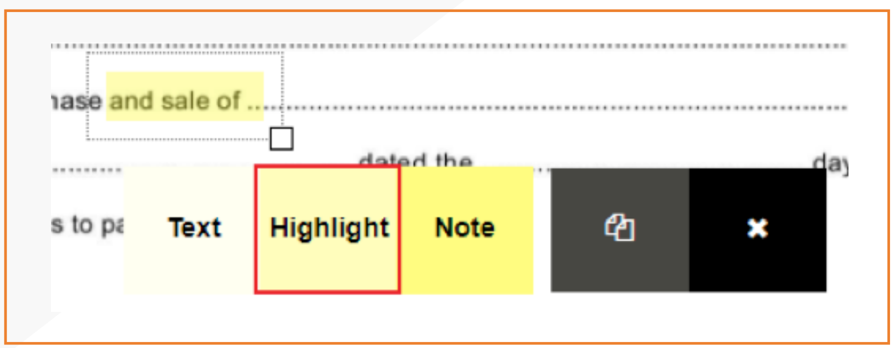
To add text to your documents, you need to drag and drop the **"Text Field"** option at the top of the document:



Place the text field box wherever you want to make your changes, then type on the box to write your new text. To resize the label, click and drag the small white box in the lower right corner of the text field. You also have the **"Note"** option to highlight your notes or **"Highlight"** to highlight parts of the text in color.







Note: Highlights & Notes are visible to your clients during their signing but they will be removed once the signing is completed.

STEP 20

You can assign a text field to a particular signer, allowing him/her to fill in the text field assigned to him/her. Select the signer who will be assigned to the added text before placing your tags.

Then place a "Text Field" box in the document. The name of the signer under the text field box indicates that this text field is assigned to that particular signer.

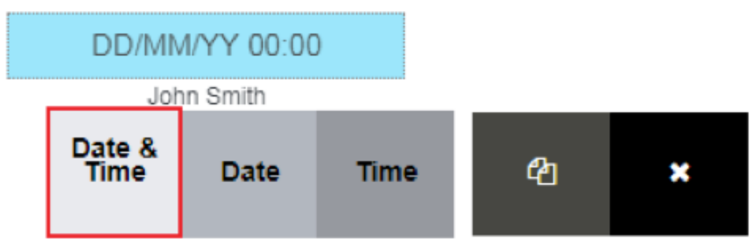
STEP 21

Once all the changes have been made to your documents, you can start placing your signatures/initials. At the top of the screen, select the clients for which you want to place signatures/initials. Drag and drop the signature or initial tags to the section which you use your clients to sign.

STEP 22

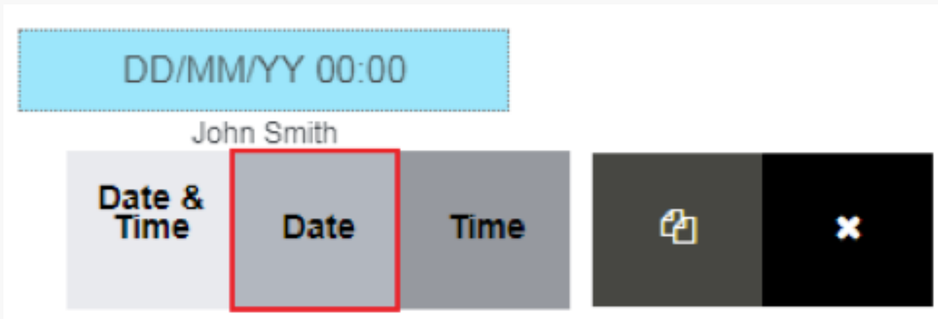
The **"Date/Time"** box automatically populates upon signing the date and/or time from your client's local device. You have 3 options to choose from:
Vous avez 3 options parmi lesquelles choisir:

Select **"Date and Time"** to have the full date (date and time):

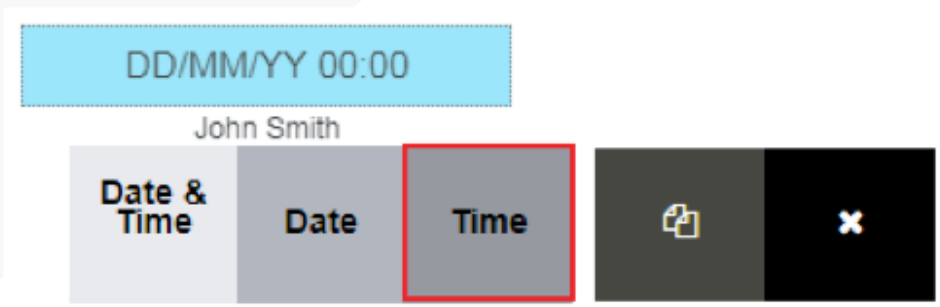


STEP 22

Select **"Date"** to only have the date:

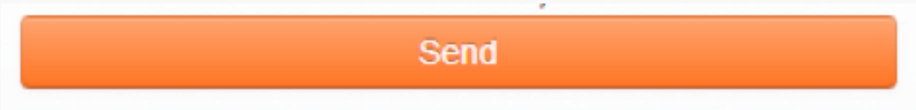


Select **"Time"** to only have the time:



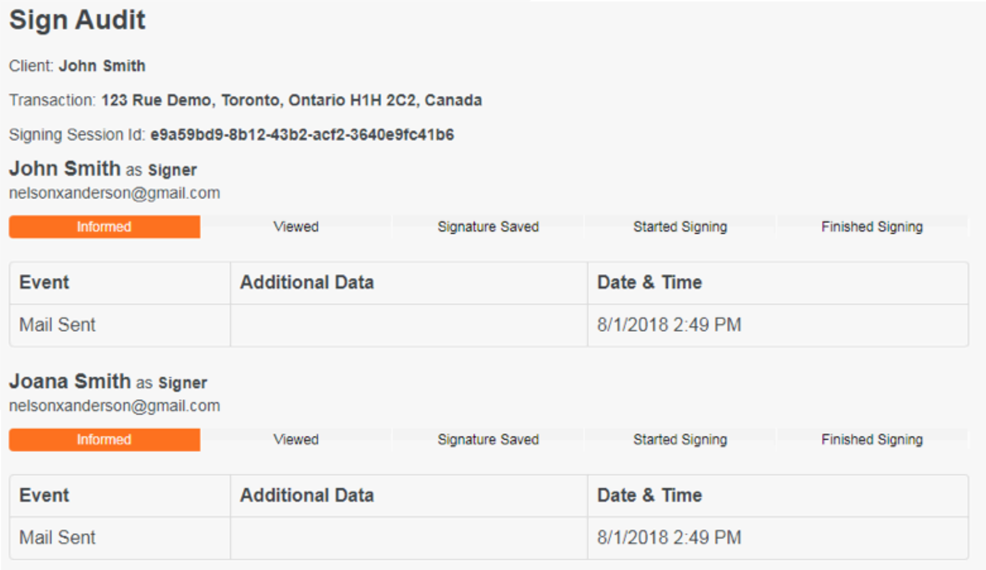
STEP 23

Once you have finished placing all your signatures/initials and are ready to send your request, click **"Send"** at the top right of the page.



STEP 24

After clicking on **"Send"**, you will be redirected to the **"Sign Audit"** page. This page allows you to see in what step your customers are in their signing process.



Sign Audit

Client: **John Smith**

Transaction: **123 Rue Demo, Toronto, Ontario H1H 2C2, Canada**

Signing Session Id: **e9a59bd9-8b12-43b2-acf2-3640e9fc41b6**

John Smith as **Signer**
nelsonxanderson@gmail.com

Informed | Viewed | Signature Saved | Started Signing | Finished Signing

Event	Additional Data	Date & Time
Mail Sent		8/1/2018 2:49 PM

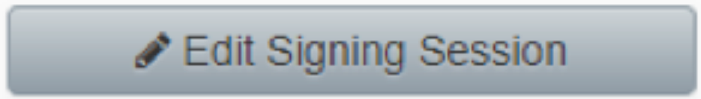
Joana Smith as **Signer**
nelsonxanderson@gmail.com

Informed | Viewed | Signature Saved | Started Signing | Finished Signing

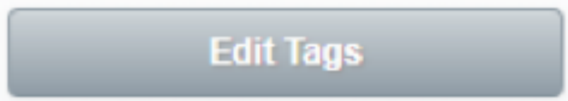
Event	Additional Data	Date & Time
Mail Sent		8/1/2018 2:49 PM

STEP 25

To edit tags and/or signers, click on **"Edit Signing Session"** in the upper right-hand corner of the page, under **"actions"**:



Edit Tags: Allows you to add or delete initials/signatures. This will take you back to the documents with all your tags placed beforehand. Once you have finished editing your tags, click on **"Send"** again in the upper right corner.

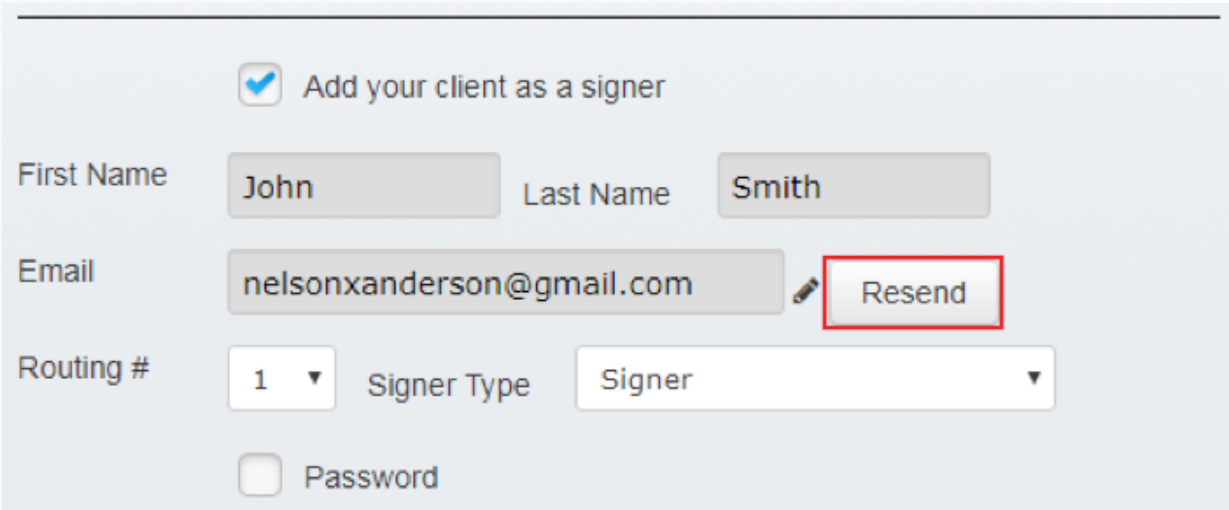


Note: Once a signer has signed, you will not be able to add any revision tags (strikethrough or text field). You can only add additional signature & initial tags to signers who have not completed their signing.

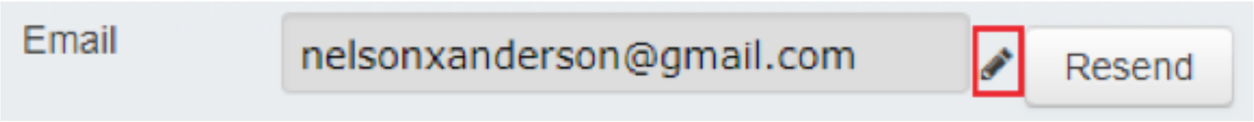
Edit Signers & Documents: Allows you to add/remove signers that you have added, or add/delete a document. Once you have finished editing the signers & documents, click on **"Tag documents for signatures"** and the request will be sent again.

STEP 25

TIP: To resend a document, click **"Edit Signers & Documents"**. Then click on **"Resend"**, just in front of the signer's e-mail address.



TIP: To edit a signer's email, click on the pencil icon in front of the signer's email. This will allow you to modify the signer's email. Then click on **"Resend"**.



STEP 26

To delete a signature session, click **"Delete Signing Session"** in the upper right corner under **"Actions"** in the Sign Audit area:

Delete Signing Session

Note: This will permanently delete the signing session and you will no longer have access to it.

STEP 27

When your request has been sent to your clients, they will receive an email inviting them to sign the documents. Signers must click on **"Start signing session"**.

Dear John Smith,

Agent NEXONE has sent documents for you to electronically sign.

Click the "Start Signing Session" button below to begin signing.

Please follow the on-screen instructions and ensure you click "Save Signed Documents" when finished.

If you have any questions or needs, please don't hesitate to ask!

Document(s) for signing:

- Agreement-of-Purchase-and-Sale-Test

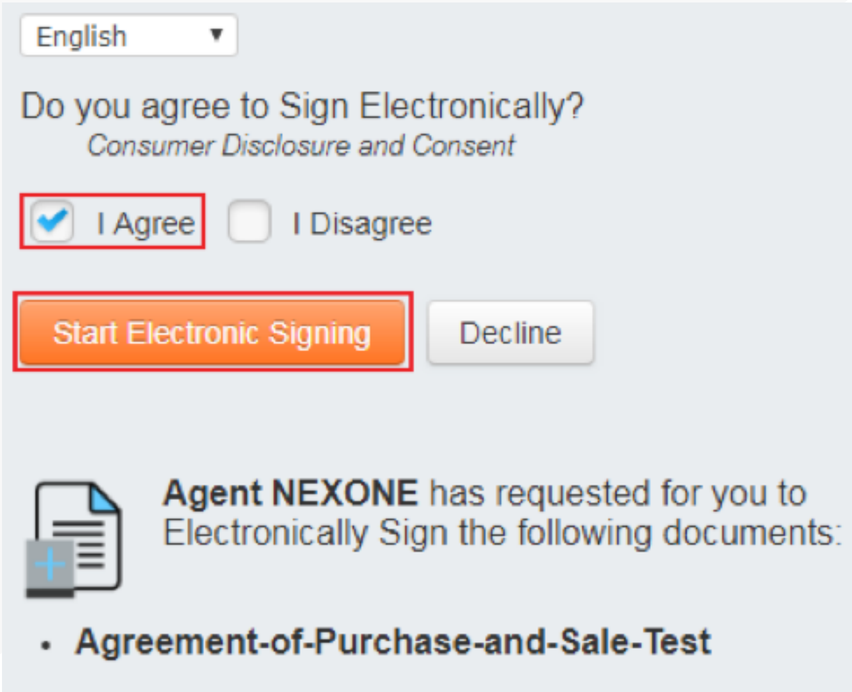
Start Signing Session

Agent NEXONE

Phone: 0
Email: agent@faltour.com

STEP 28

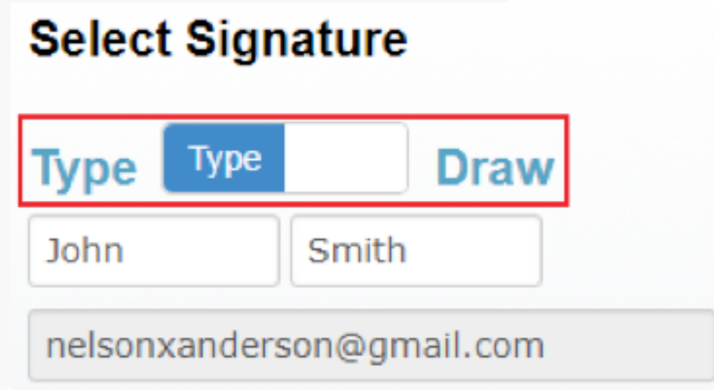
Once your signer has clicked on **"Start signing session"**, a new window will open. They will be asked to consent to an electronic signature. They must click **"I agree"** and then **"Start Electronic Signing"**.



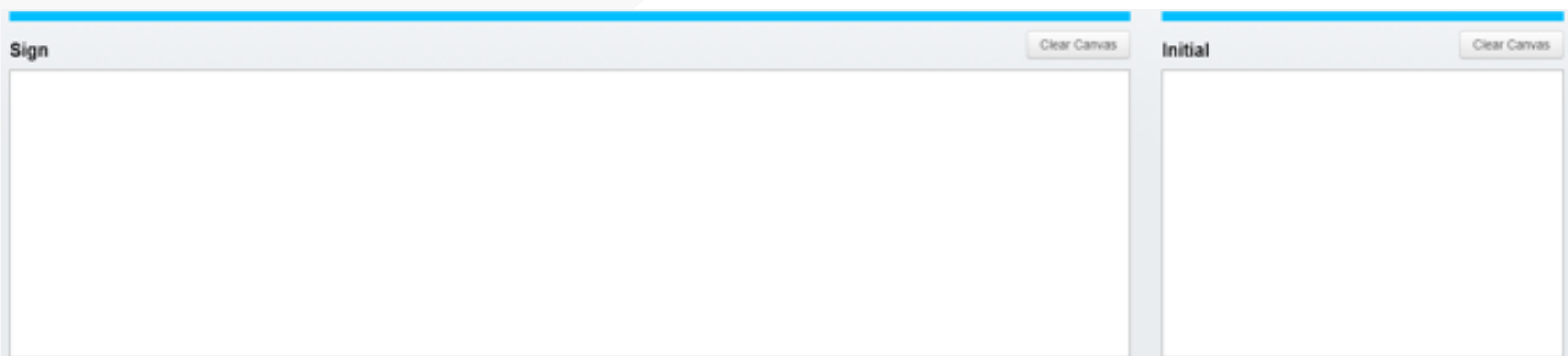
Note: If the signer refuses consent, you will be notified by email that the signer has refused to sign electronically.

STEP 29

Once your signers have agreed to sign electronically, they will be taken to the page where they can decide on their type of signatures/initials. In the upper left corner of that page, they may choose to draw their own signature, or just select the font type:



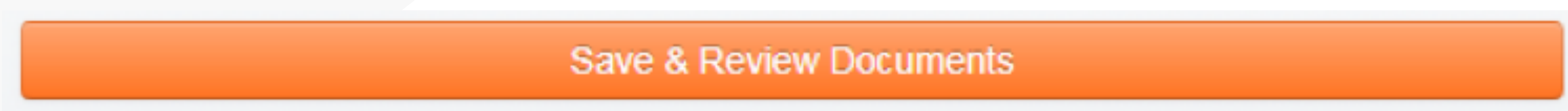
If they choose **"Draw"**, they will have an empty canvas to draw their signatures/initials



STEP 29

If they select **"Type"**, they will be able to select a font type for their signatures/initials in the drop-down menu.

Once clients have finished drawing or choosing their signature type, they will have to click on **"Save and Review Documents"** on the right side of the page:



STEP 30

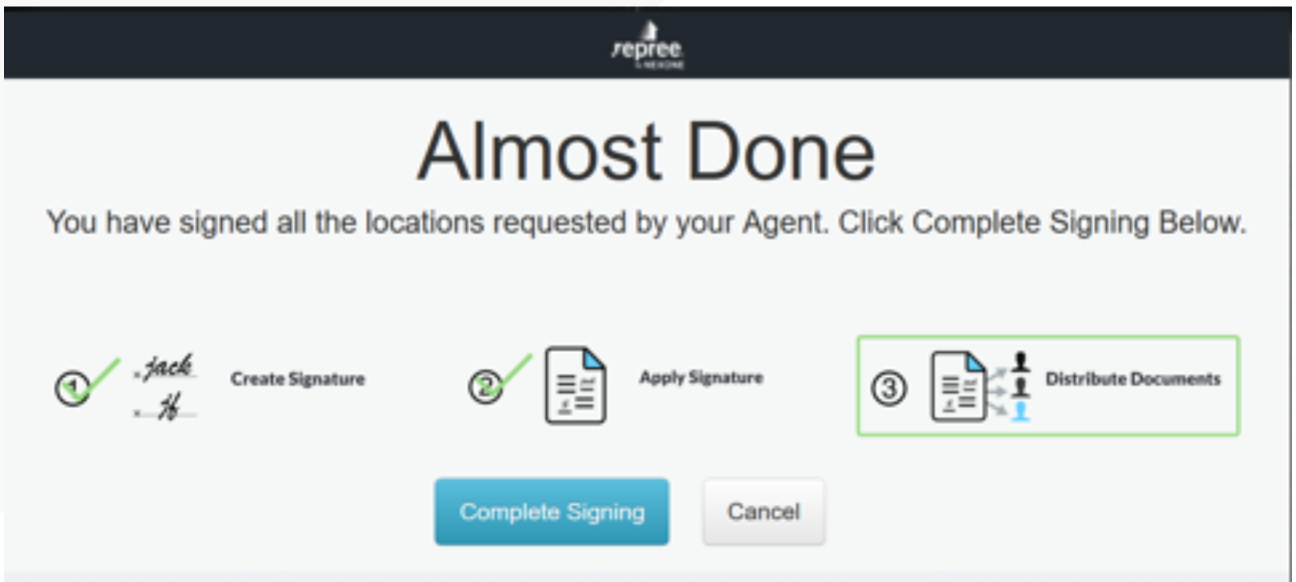
After clicking on **"Save & Review Documents"**, signers will need to click on **"Start Signing"** on the left side of the page. If your clients cannot see all the tags in the documents, they can always click on **"Find Missing Tags"** in order to be redirected to their assigned tags.

STEP 31

Your signers will be redirected to their tags. An interaction box will appear on the document helping the signers through the actions to be taken to complete their tags.

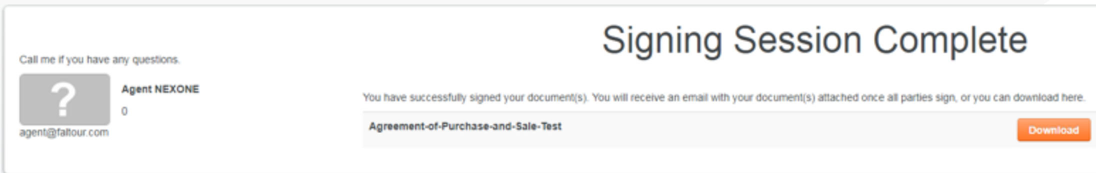
STEP 31

Once the signers have clicked on their first tags, they will then click on the **"next"** button, and will automatically be directed to the next assigned tag. Once the signers have completed their tags, they will be asked to **"Finalize"** and then **"Save"** the signed documents.



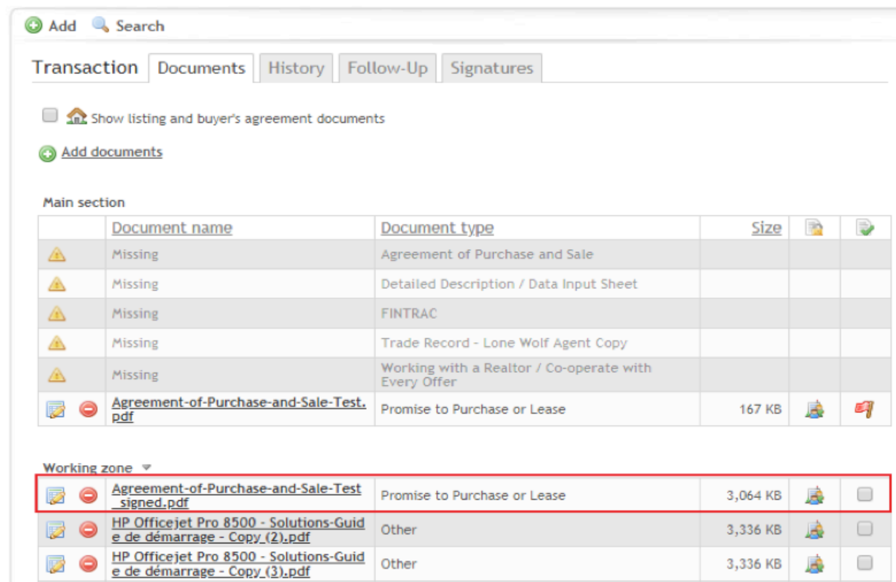
STEP 32

Once the signers have completed signing all documents, they will be able to download the signed documents. In addition, an email will be automatically sent to them along with their signed documents attached.



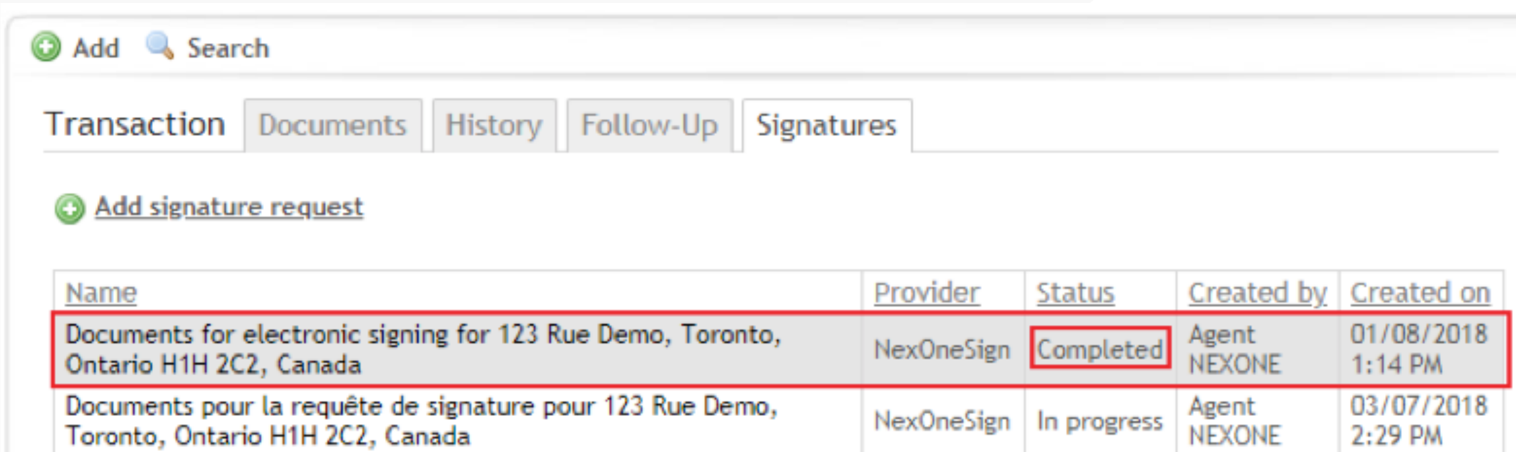
STEP 33

Once the signature request is complete, your documents as well as the summary of evidence of your signatures will automatically be uploaded to the **"Documents"** section of the folder from which you have created your signature request.



STEP 34

You can still access your different signature requests anytime, under the **"Signatures"** tab of your folder.



THANK YOU