Webforms Deal Walkthrough

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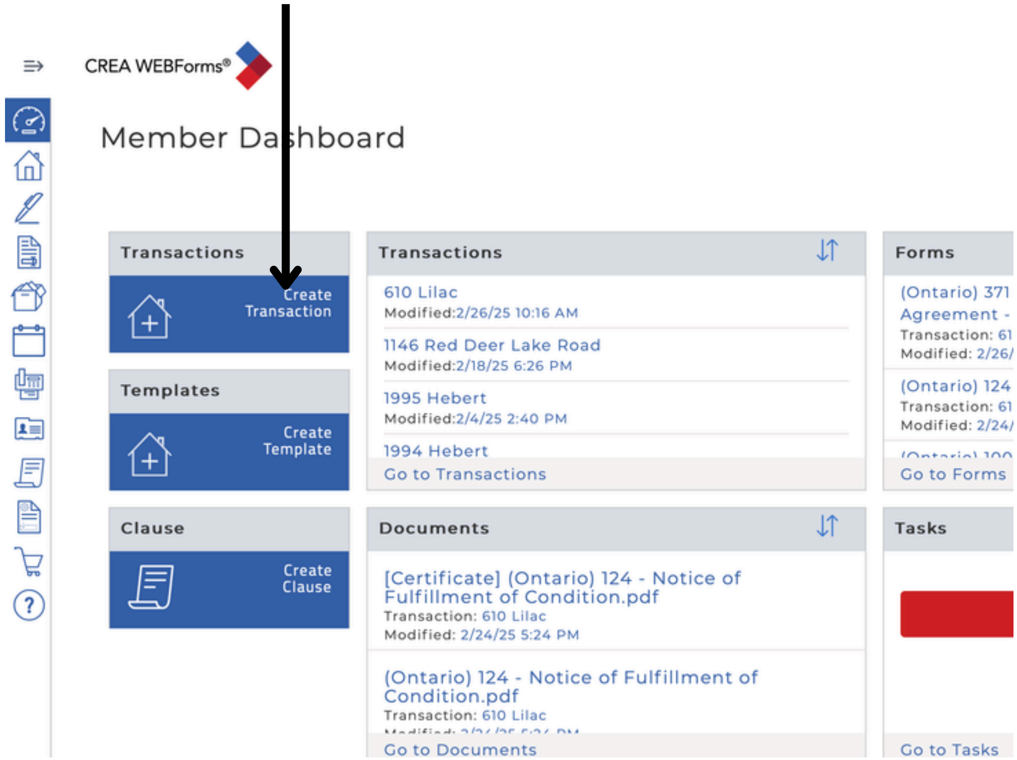
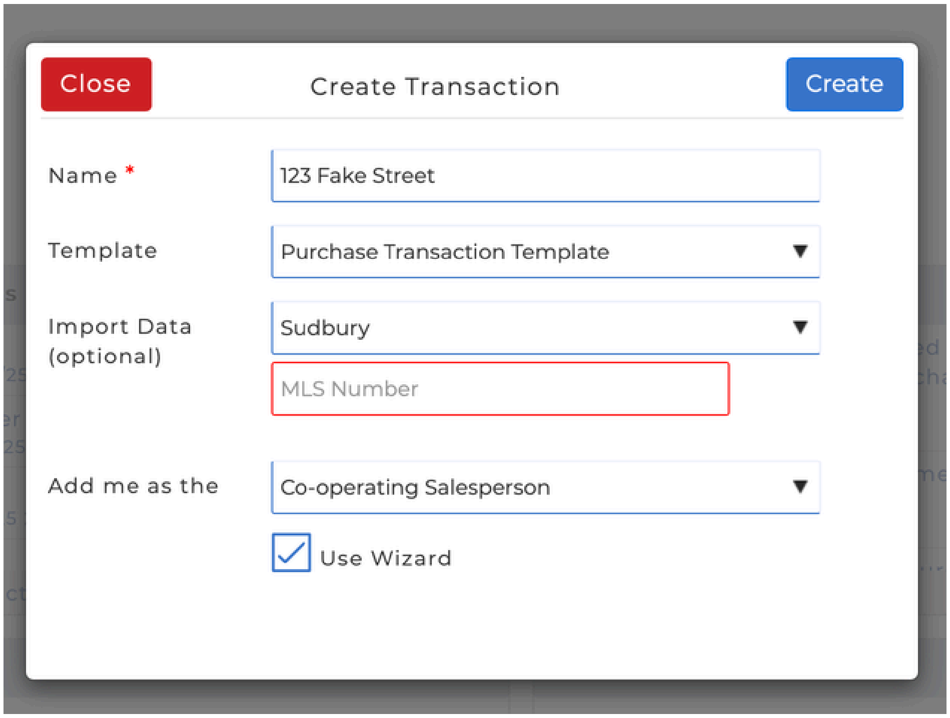
train

Step 1: Click “Create Transaction”



Step 2: Enter Transaction info. Select a template and if available enter MLS number to help pre-populate the transaction.



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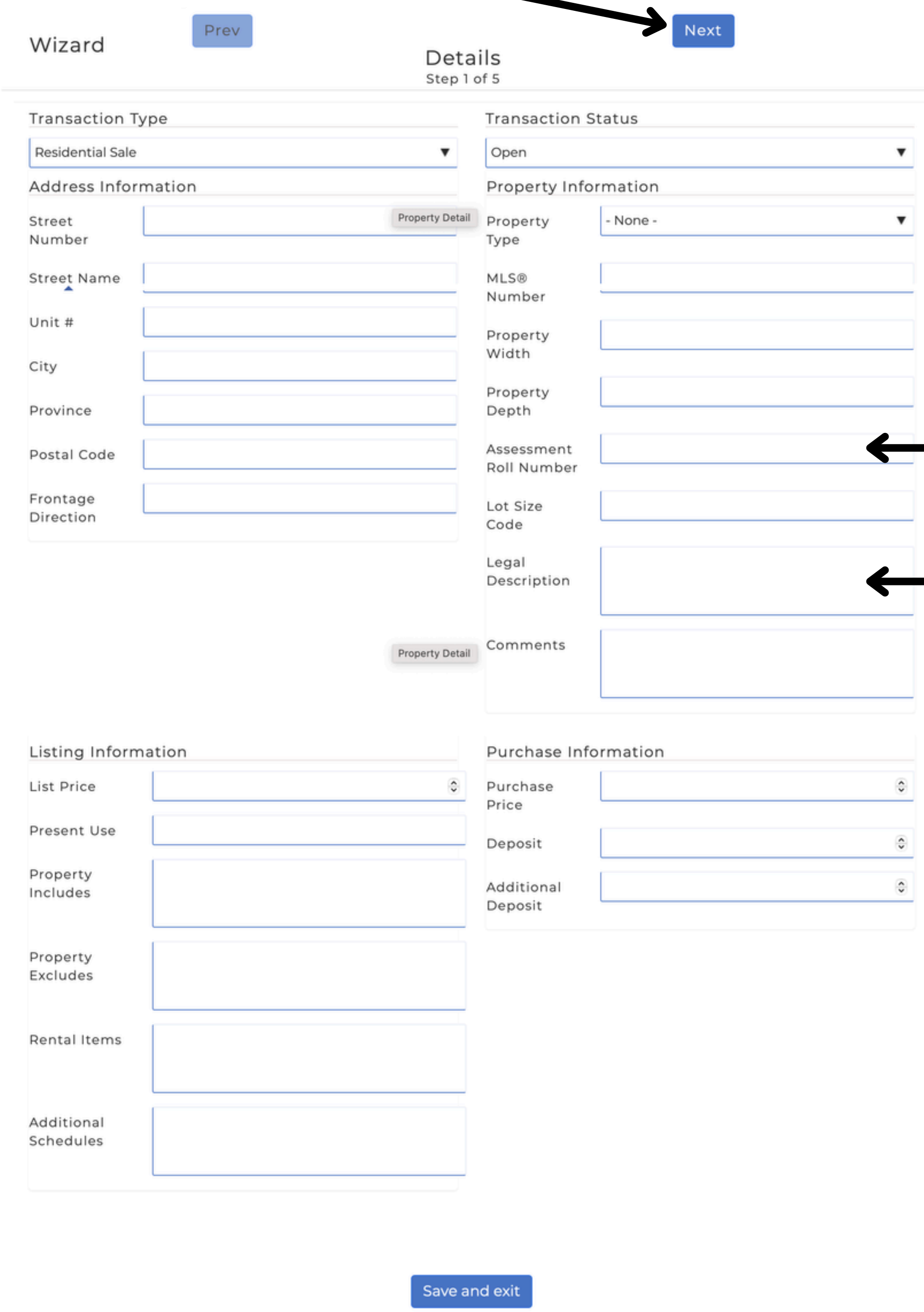
Step 3: Fill out as many details as you can about the property, then select “next”



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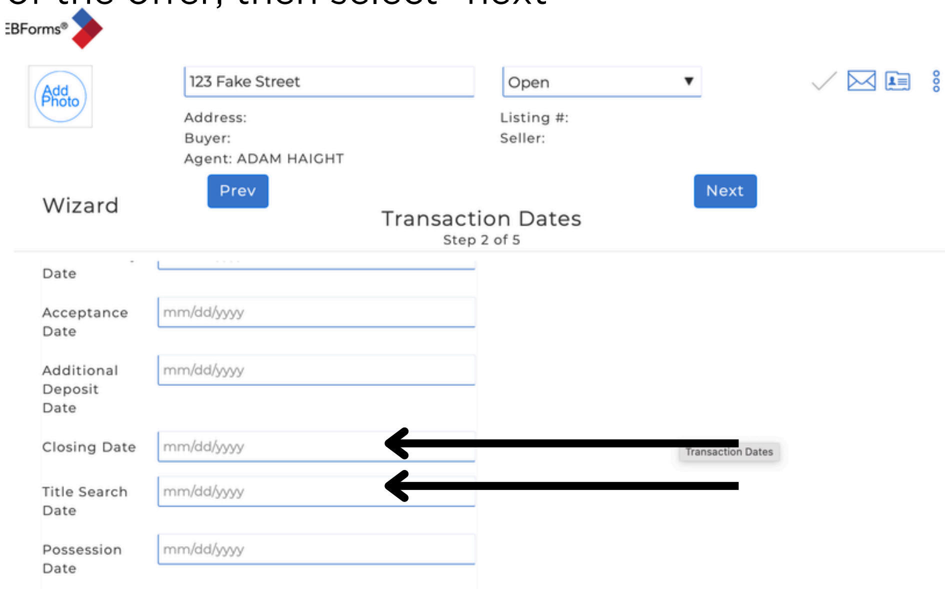
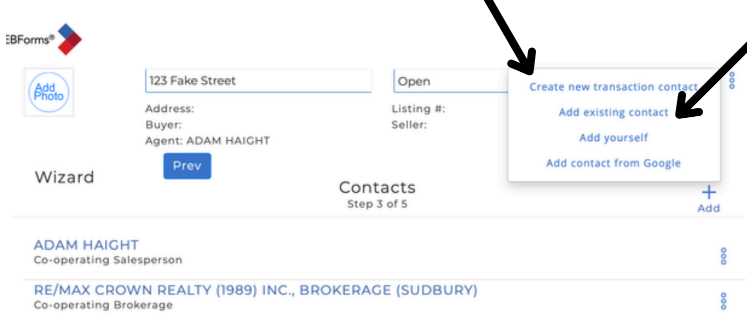
Step 4: Enter the closing date, irrevocable date and the title search date of the offer, then select "next"

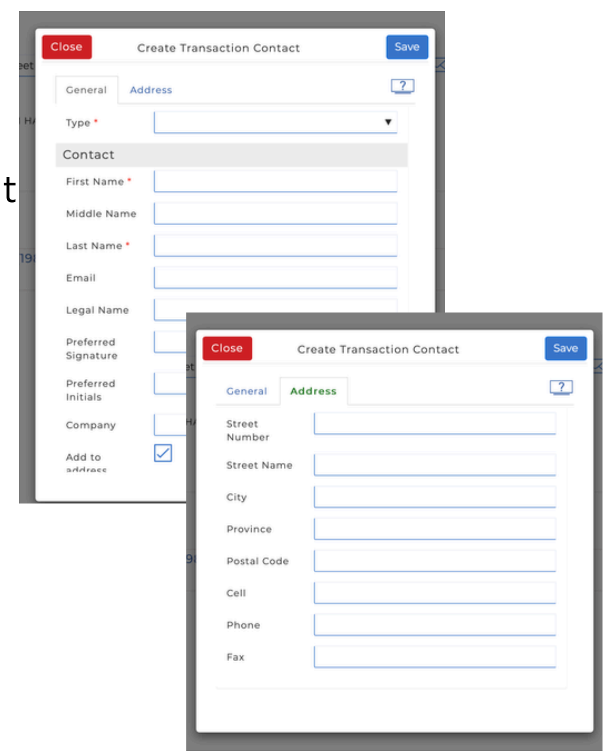


Step 5: Add your client(s) to the transaction by selecting the "+" button, then select if they are new or have already been entered (previous deal). It's best to fill out all of their personal info as well.

If new client

If existing client





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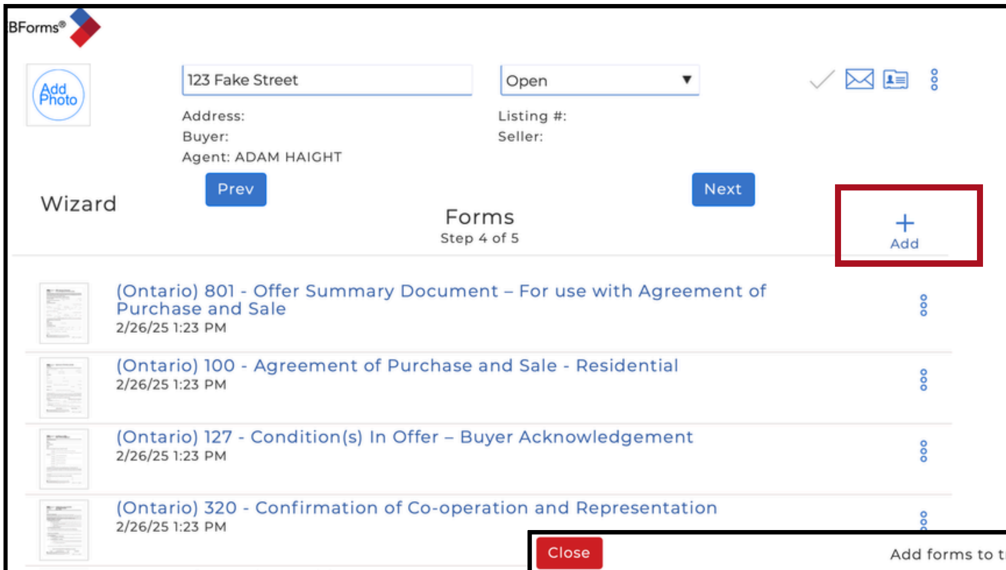
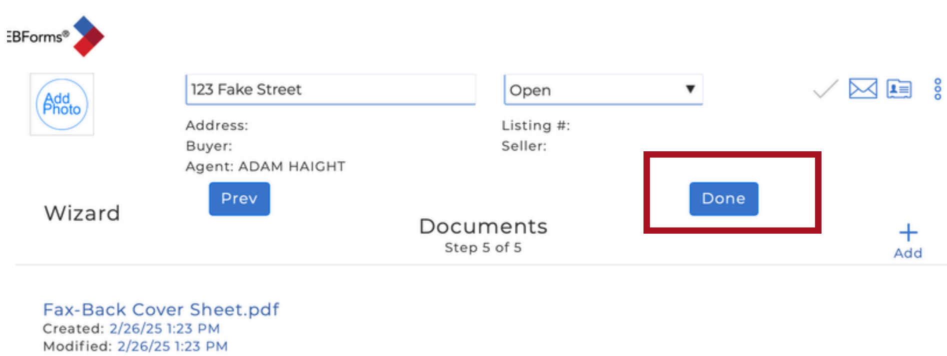
Step 6: Ensure all of the forms you need are populated from your template. If not, add additional forms by using the "+" button, then when ready, select "next"



If you add a form you will get a popup like this:

From here you can either browse the OREA forms, or use the search bar to quickly find the form you want to add.

Step 7: The final page of the Wizard will show documents. This is rarely used. When ready select "done" to close the wizard.



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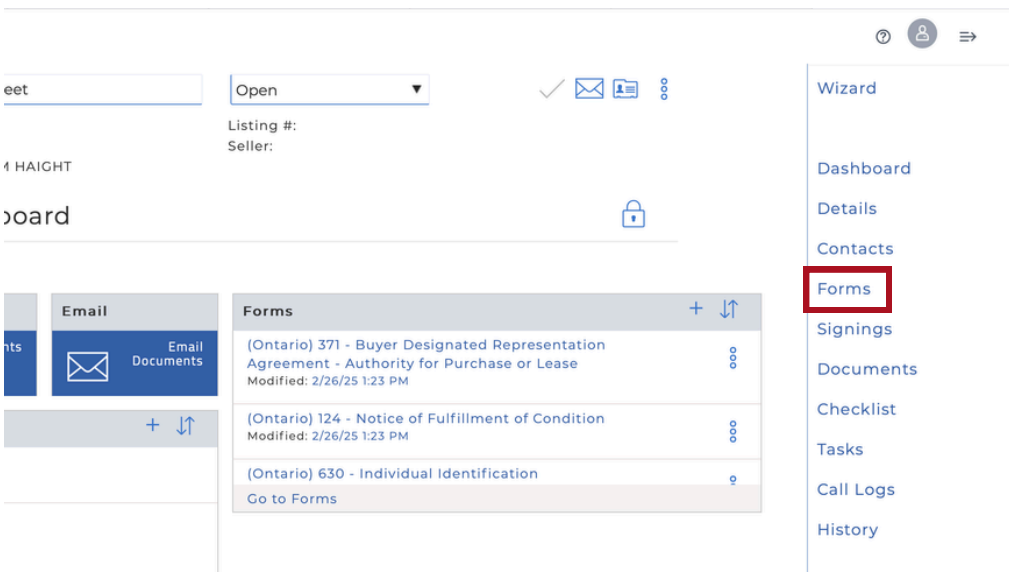
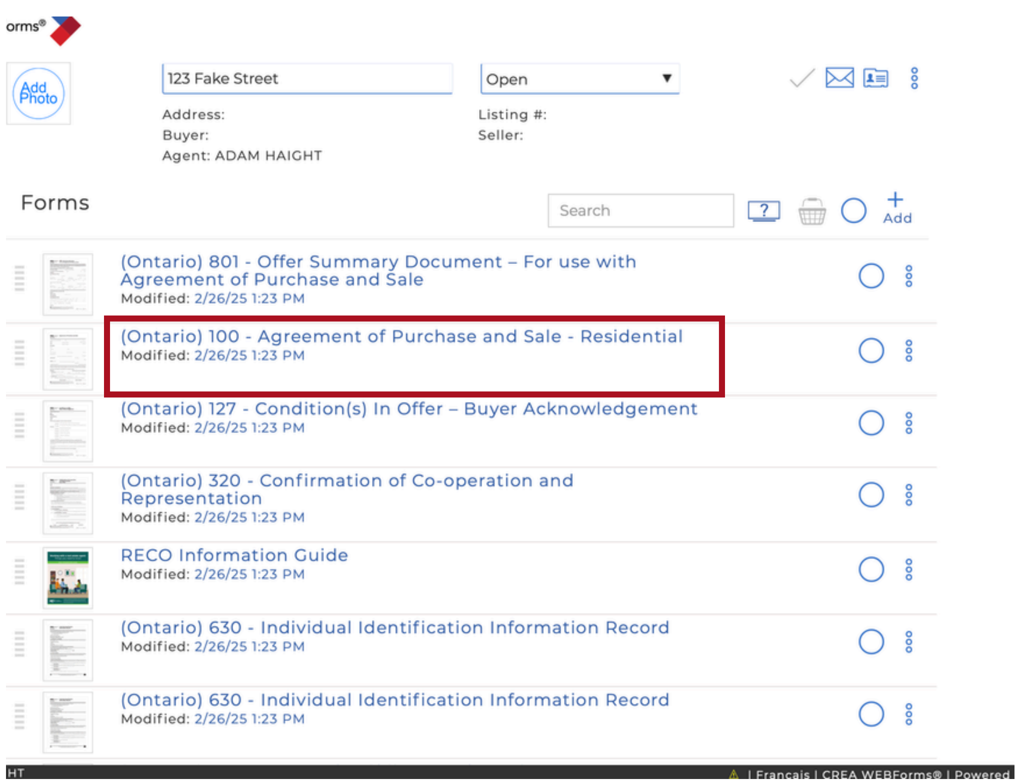
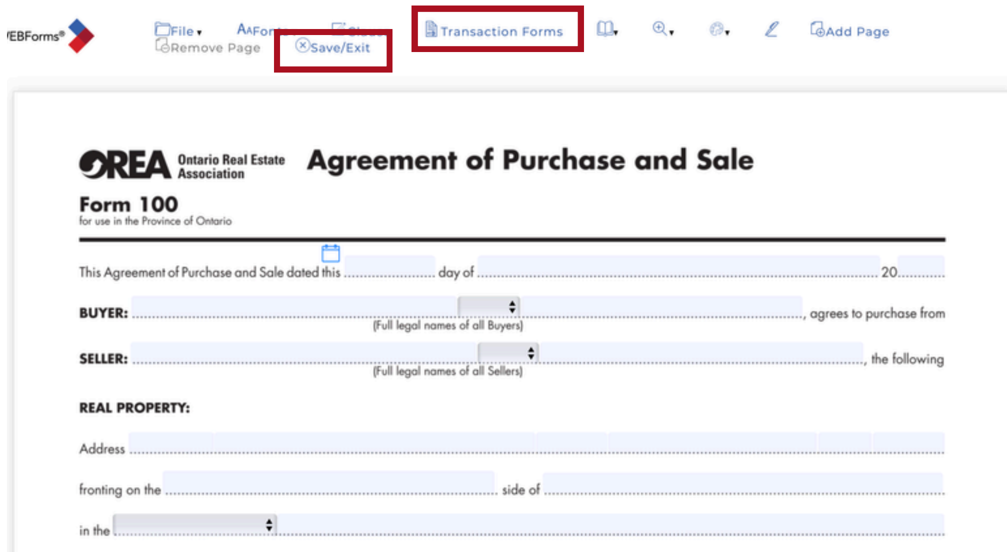
Step 8: You will now be at your transaction dashboard. From here you can fill out your forms. Start by selecting “forms” on the right side menu.



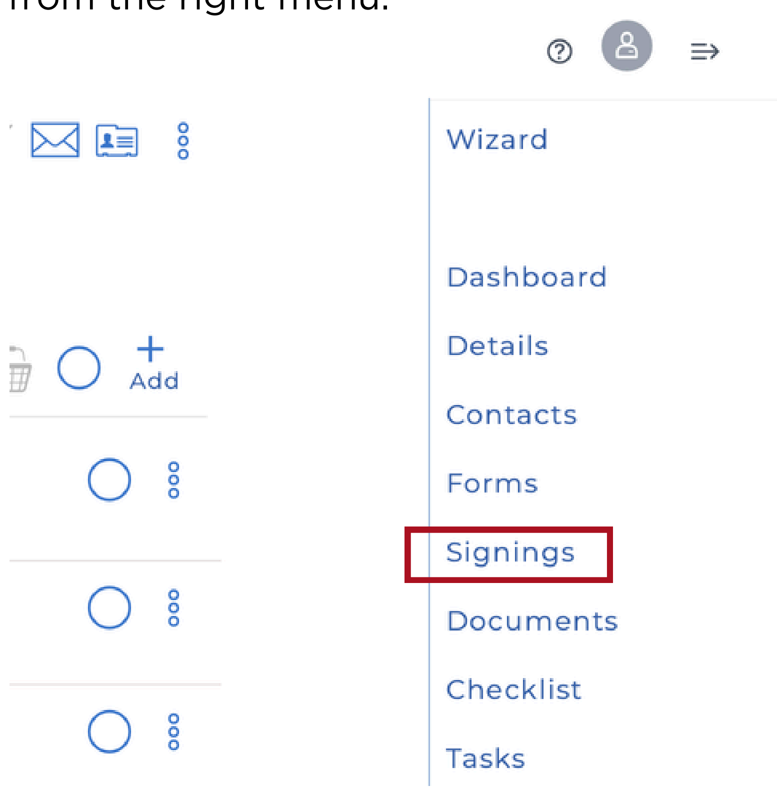
Step 8: You should now have all your forms in front of you. Click on the name of one of them to start populating.



Step 9: Navigate through each form, making sure all are filled out properly. You can select another form to edit by clicking on “Transaction Forms” at the top. When done all forms, click “save/exit”



Step 10: Now that your forms are filled, it’s time to start a signing. Select “Signings” from the right menu.



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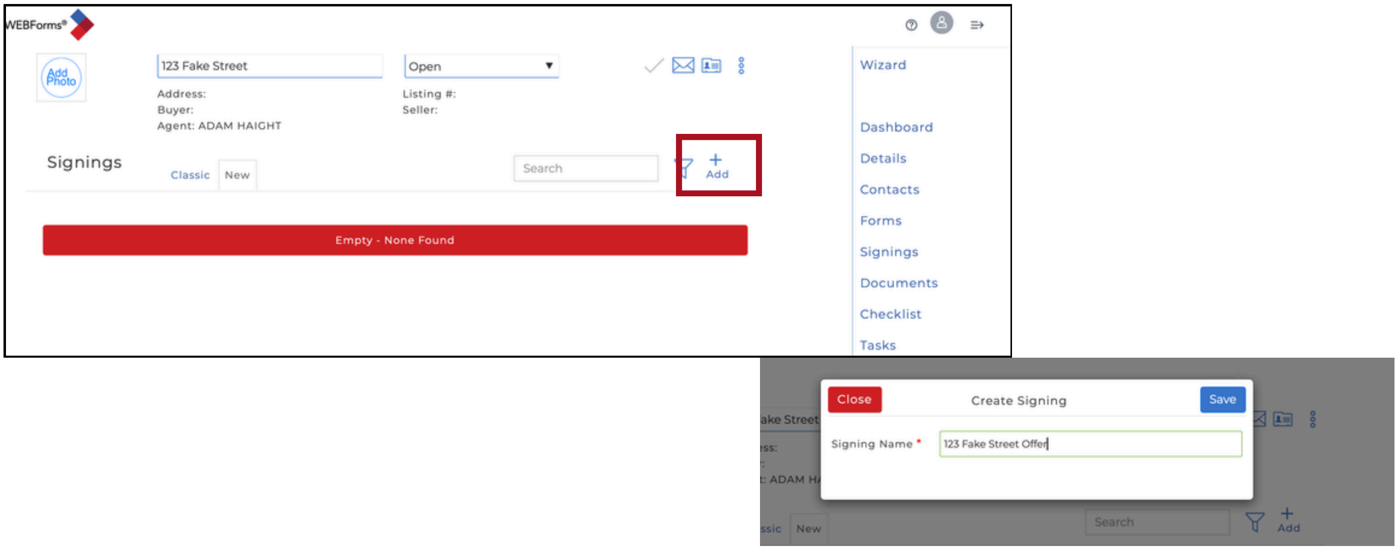
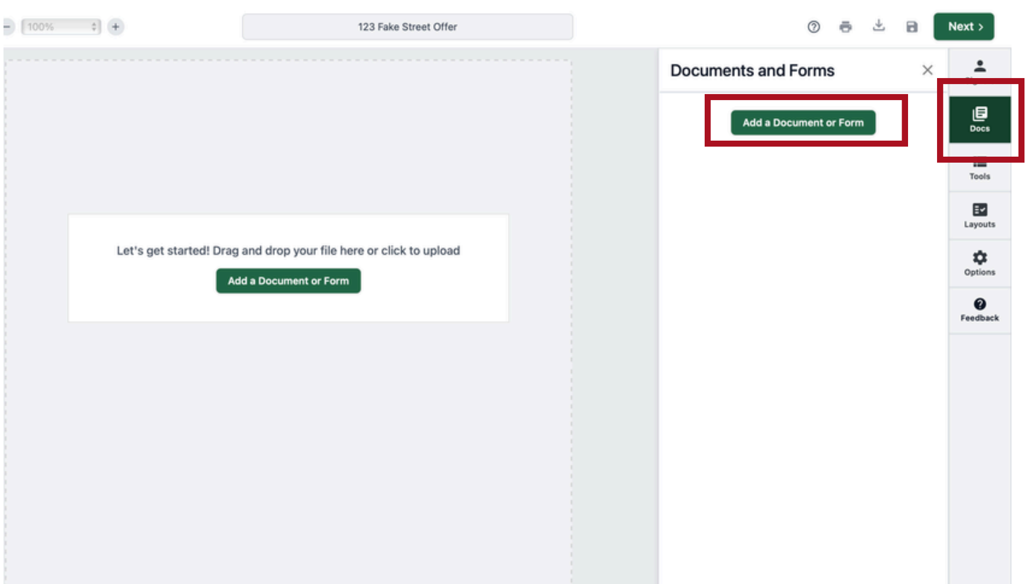
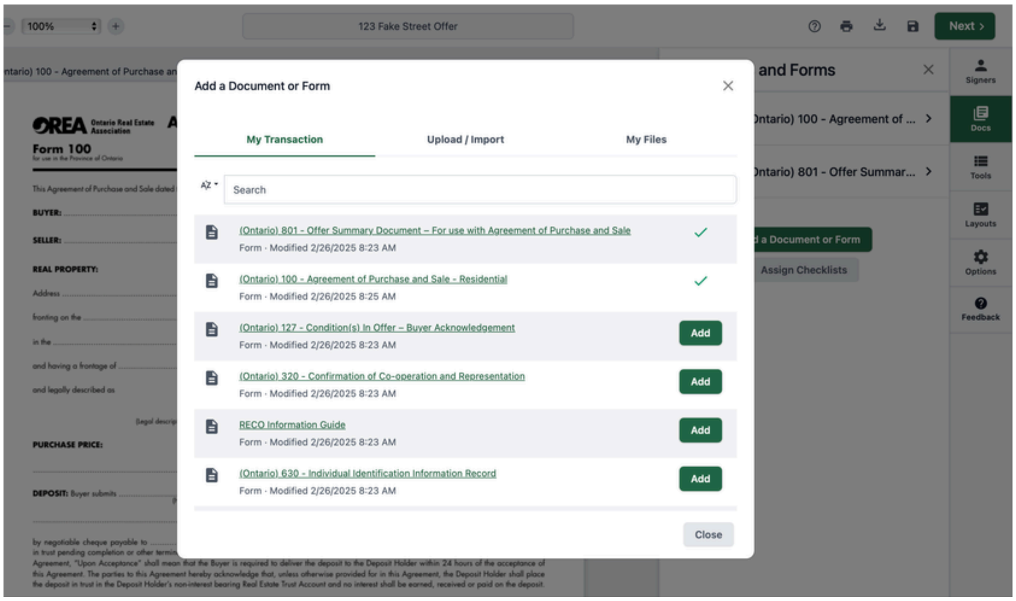
Step 11: Click the “+” button to add a new signing, and title it what you’d like.



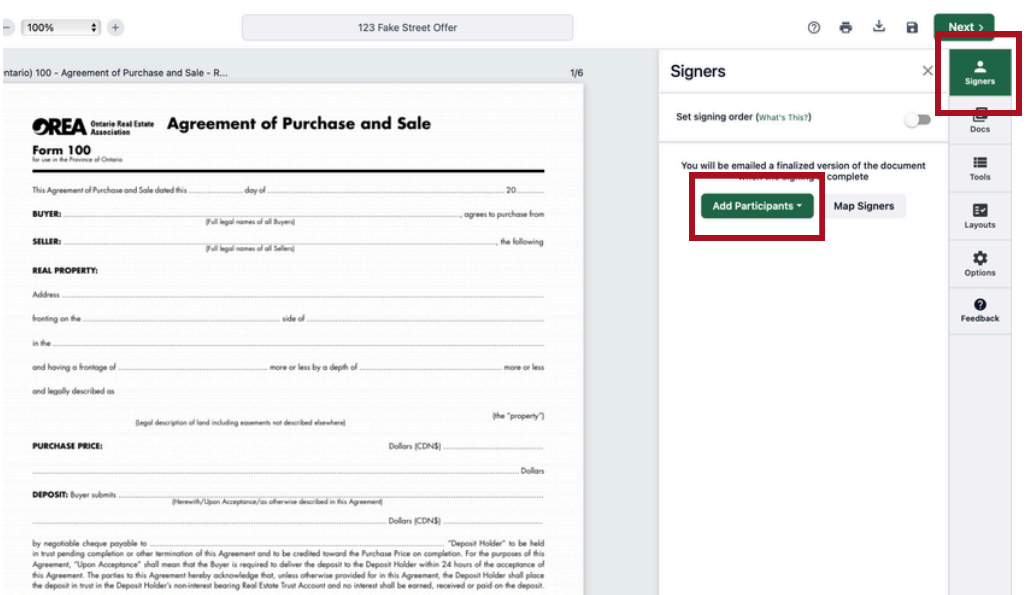
Step 12: You are now in your Authentisign dashboard. Start by selecting “Docs” to add the documents needing to be signed, then click “Add a Document or Form”.



Step 13: Add all the documents needing to be signed.



Step 14: After all you documents are in the signing, you'll now need to define who needs to sign, and where. Select "Signers" on the right menu, then click "Add Participants".



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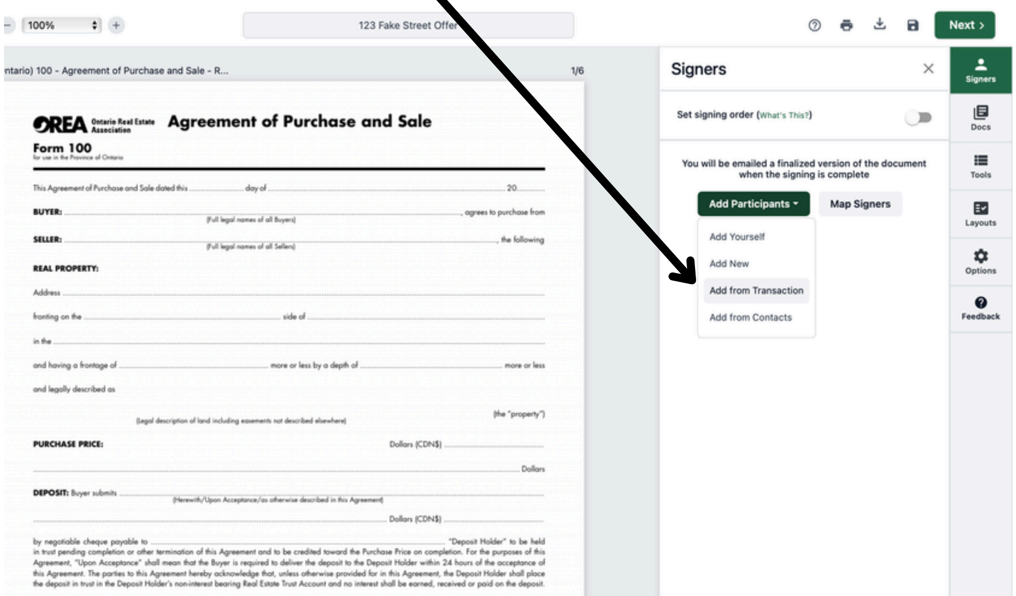
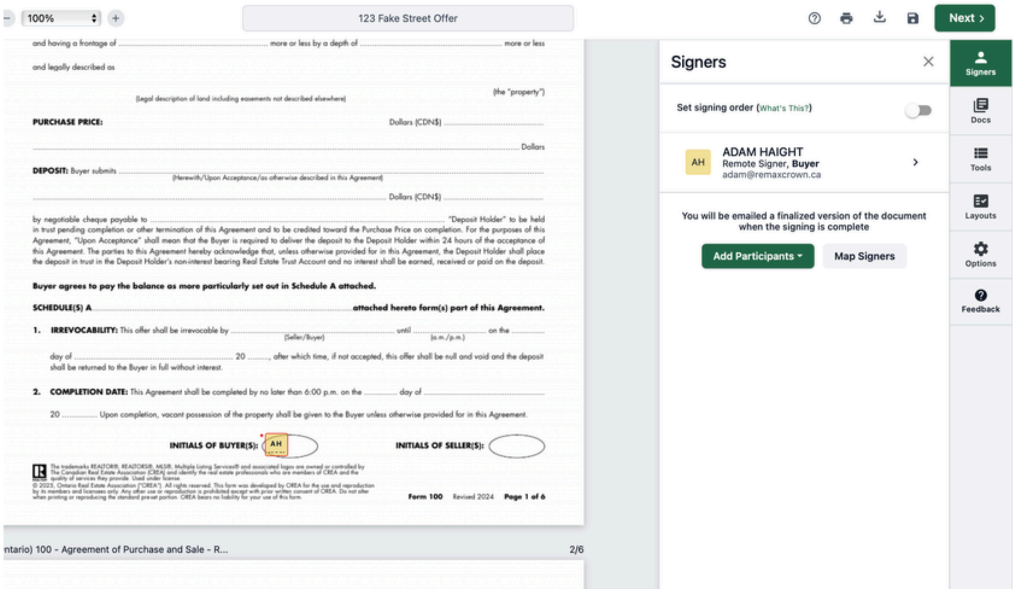
Step 15: From the “Add Participants Menu” Select “Add from Transaction” to find the contacts you previously entered in the transaction.



Step 16: The system should auto-populate the majority of where the client needs to sign, however it’s important to review and ensure both your and your clients signatures are in the correct spots.



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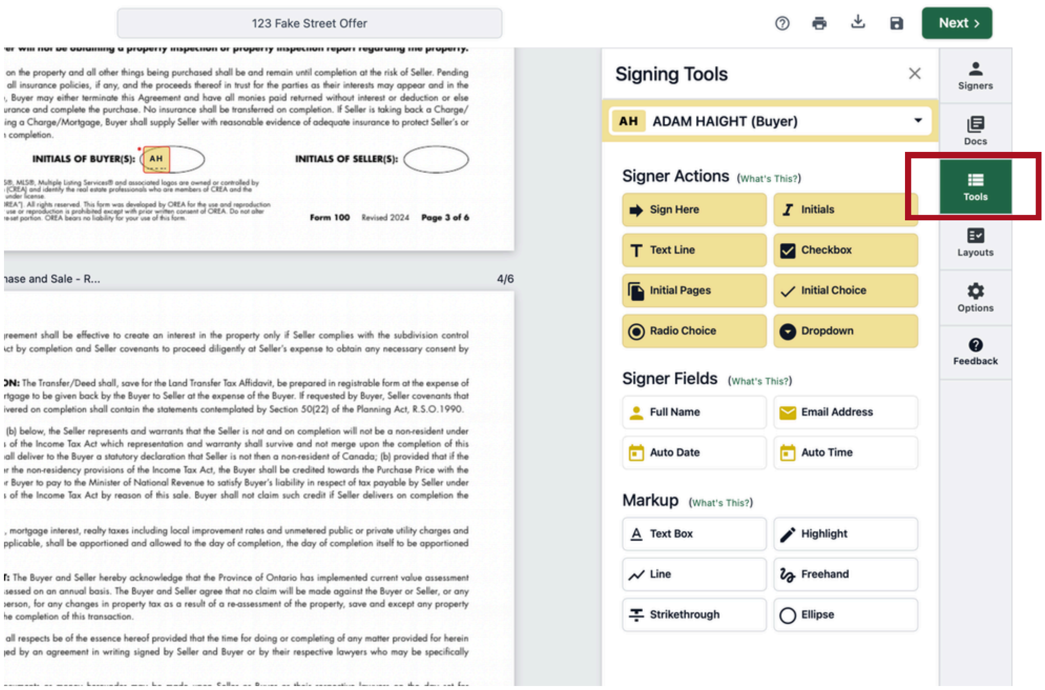
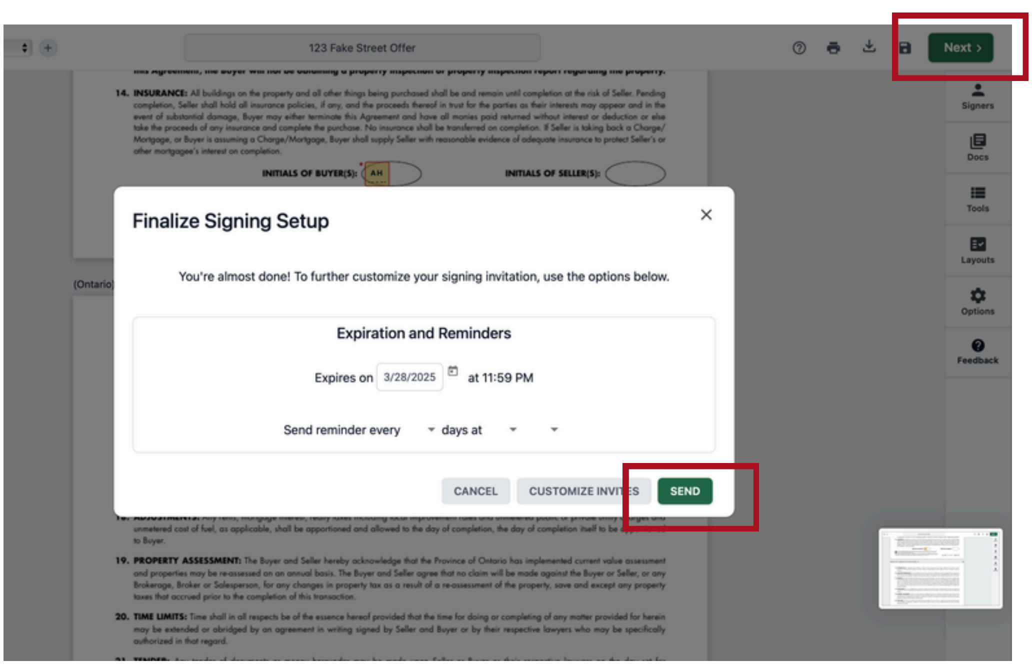
Step 17: In order to add a signature, initial, date, etc. Select “Tools” from the right hand menu, and simply drag and drop the appropriate field onto the document.

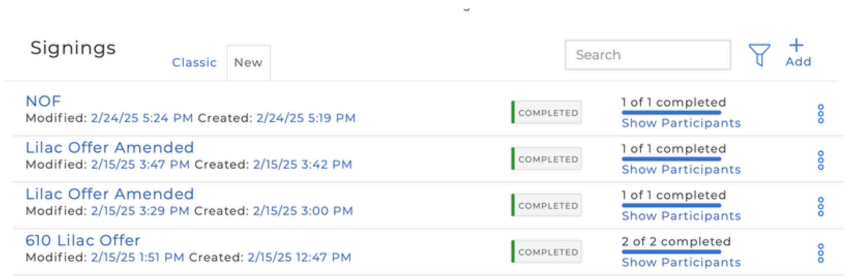


Step 16: Once you are satisfied all is correct, select the “Next” button at the top right of the screen, then hit “Send” to send for signatures

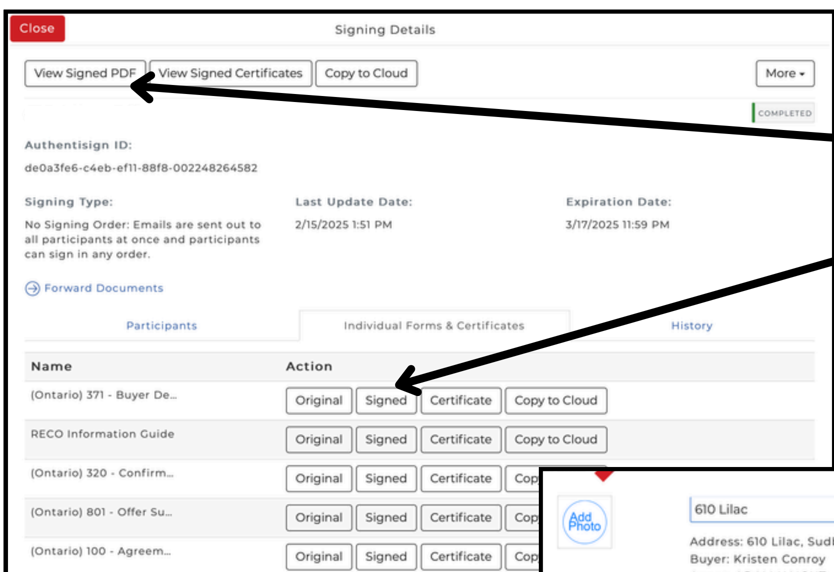


After the Signing

When the signing is done, you'll be notified via email. You can then find the signed documents in two places; "signings" and "documents".

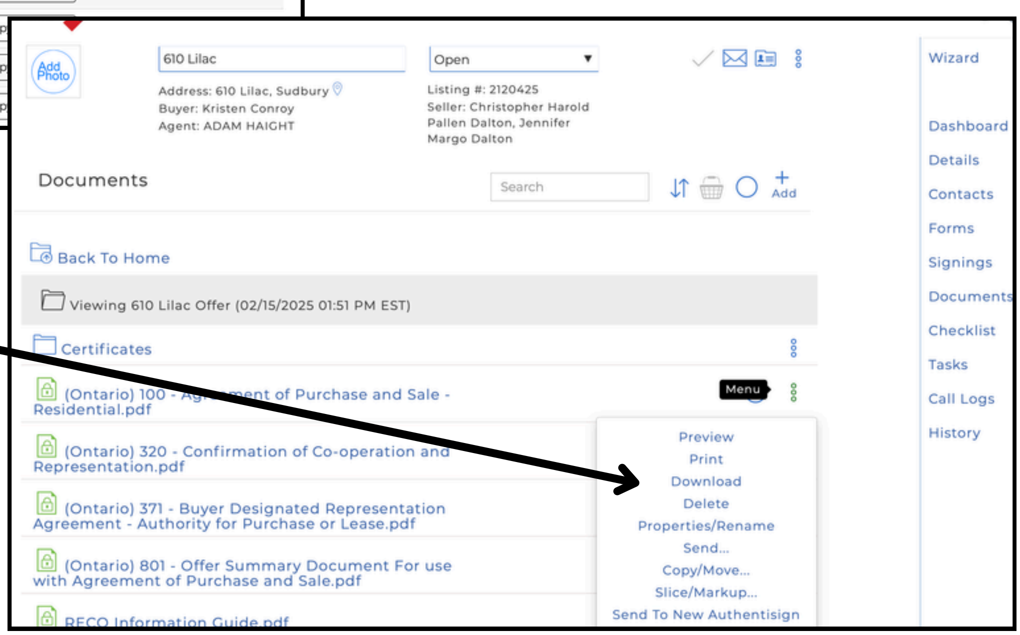


From your transaction dashboard, signed documents will be available in both "signings" and "documents"



From "Signings" you can view the entire signed PDF or;

each form individually



"Documents" gives you a different view where you can directly download the individual signed forms.