



Forms | Documents | eSign | Checklists

Agent User Guide

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Introduction to rDocs

Welcome to this Reference Guide for the rDocs forms and document management application. This guide will walk you through the steps to log into rDocs (or access it from CRM if applicable), add clients, manage forms, and upload, store, share, and sign documents, and submit documents for Broker Review.

Please note that you may only have access to portions of the features and services described in this document. For more information, please contact your administrator.

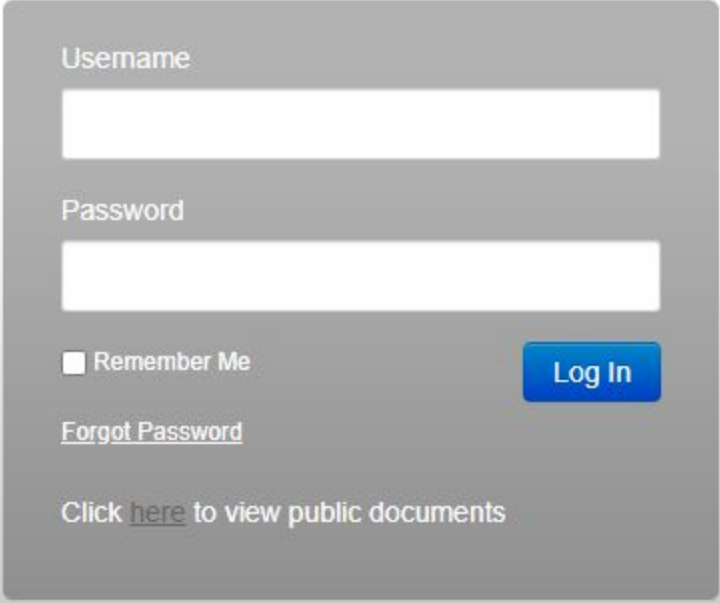
If you have an account in CRM, you will use the same User Name and Password credentials.

NOTE: rDocs works in all major browsers including Firefox, Google Chrome, Internet Explorer 9.0 and later, and Safari and on both Windows and Mac operating systems. With the exception of uploading documents via a browser, rDocs has been optimized for tablets on both iOS and Android.

Important: Your browser settings must include “Allow Pop-ups and Cookies” to use all of the features in rDocs.

Logging in to rDocs

The first time you log-on to rDocs, you must use the URL provided by your Administrator (e.g. <http://yourcompanyname.mydocs.com>), read and accept the Terms of Use. If you also have an CRM account, you may access rDocs from it – after you have completed this step.



The image shows a login form with a grey background. It contains the following elements from top to bottom: a text input field labeled "Username", a text input field labeled "Password", a checkbox labeled "Remember Me", a blue button labeled "Log In", a text link labeled "Forgot Password", and a text link labeled "Click [here](#) to view public documents".

The rDocs Dashboard

rDocs provides an intuitive layout to quickly enter data and manage forms, documents and contacts with easy navigation from the “Dashboard” screen. Key features of the dashboard are described below.

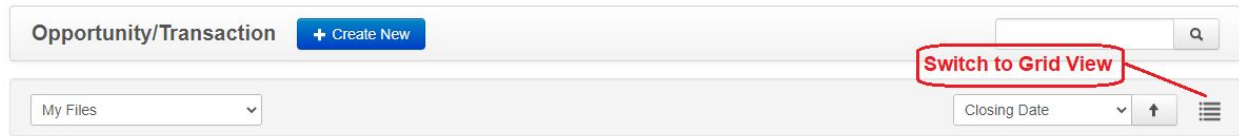
The screenshot shows the rDocs Dashboard interface. At the top left is the ABC REALTY COMPANY logo. To the right, it displays the date "Tuesday, June 2, 2020" and a "Select" dropdown. Further right is the user profile for Prabakar Mahalingam, including his company name, address (4895 S. Quebec, Denver, CO 80237), phone number (P: 959-999-9999), and email (prabakar_rd@gopaperless.com). Below this is a navigation bar with "Opportunity/Transaction" and a "+ Create New" button (callout 1). A search field (callout 3) is located to the right of the navigation bar. Below the navigation bar is a "My Files" dropdown (callout 6) and a "Closing Date" filter (callout 5). A filter bar (callout 4) contains tabs for "All", "Active", "Closings", "Buyers", "Sellers", "Tenants", "Landlords", "Archived", and "Needs Attention". The main area displays three transaction tiles. The first tile is for a Buyer (3) named Nadia Mahalingam, with agent Prabakar Mahalingam. It shows 7 Forms, 13 Documents, 6 Contacts, 1 Task, 19 eSign, and 0 Orders. The second tile is for a Buyer (1) named John Doe, with agent Prabakar Mahalingam. It shows 6 Forms, 9 Documents, 1 Contact, 1 Task, 4 eSign, and 2 Orders. The third tile is for a Seller (1) named Sally Smith, with agent Prabakar Mahalingam. It shows 4 Forms, 8 Documents, 1 Contact, 2 Tasks, 4 eSign, and 0 Orders. Each tile includes a "Created" date and an "Est Closing" date. A red bracket (callout 2) highlights the agent information in the first tile.

- 1 The Dashboard makes it easy to initiate a new Opportunity/Transaction Tile
- 2 Each Tile displays information specific to a unique transaction and a specific client
- 3 Searching Tiles is easy – just enter the client name, address or MLS # in the Search Field. If you are a broker, the Search function also allows you to search for an agent by typing a few characters of the agent’s name on the Search textbox. Make sure that you choose “Agent Files” from the drop-down list prior to searching.
- 4 Filtering - click on a Filter category, e.g. Active, Buyers, Sellers, etc. to display tiles that match the filter criteria. “Needs Attention” is a special category that filters tiles with at least one document that was rejected by the broker in the file review process. You can also filter to see active and archived tiles.
- 5 When more than 27 tiles are displayed in a dashboard view, the system will automatically “paginate” the tiles and add new screens that can be accessed using the page number or arrows.
Note that you can still use the search feature (in #3) to query and locate a tile.

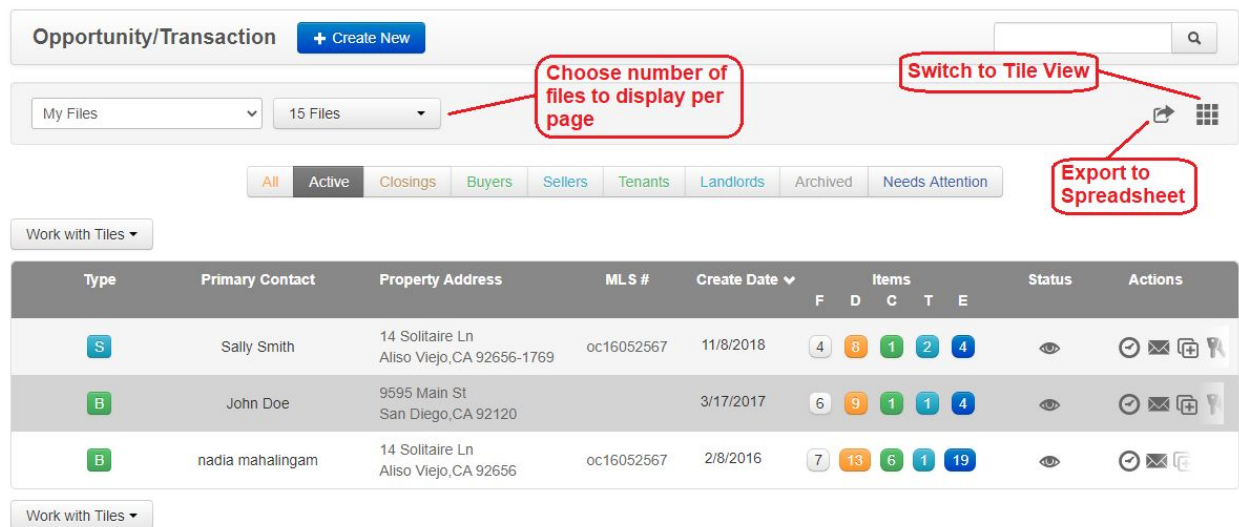
- You can sort the Tiles by Date Created, Closing Date, Property Address, and Contact Name. The Arrow to the right of these selection criteria allows you to sort either ascending or in descending order.

Dashboard List View

Tiles on the dashboard page can be viewed as a list by clicking on the 'List View' icon.



The 'List View' displays much of the information available on a Tile. From this view, you can work with forms, documents, contacts and tasks. You can also use the icons on the dashboard to activate or inactivate tiles, view eSign history, send email to contacts, create a public access code and delete a tile. You can export the information displayed by choosing the 'Export' option, and can switch back to the Tile view.



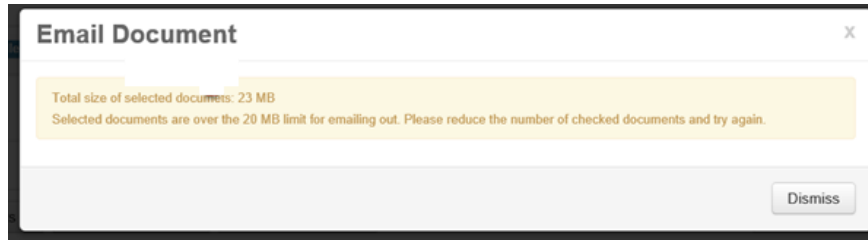
By default, 15 lines will be displayed, but you can change that by selecting the other options available: 50 or 100 files. The display can be sorted by Agent Name, Primary Contact, Property Address, MLS #, creation date or status by clicking on the appropriate column heading.

Additional notes and tips:

- If your account doesn't include forms or document management, your tiles may look different.
- You can have multiple Tiles for a client (e.g. helping them list a home to sell, helping buy a vacation home, selling a commercial building). Each transaction will have its own Tile and if you grant them access, the customer will be able to access their own account to see all transactions.
- While you can't change the order of Tiles on the Dashboard, it is easy to find the Tile you want by filtering based on Active, Closings, Buyers, and Sellers. Or just type a couple of numbers or

letters representing a name, address or MLS number on the Search textbox and click the search icon – the screen will refresh to display the matching Tiles.

- eMail can be sent from several places in rDocs. The combined size of all documents in an outgoing email from rDocs cannot exceed 25mb. A message will display if there are too many.



Announcements can be prepared by administrators and will be displayed above the tiles.



The rDocs Tile

Tiles are designated as Buyer or Seller.

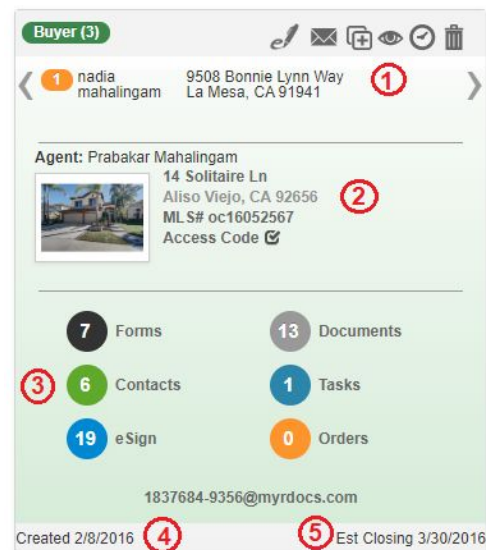
1 - Contact info displays – and if there is more than one contact, the arrows will pan to right/left to display other contacts.

2 - Property Information can be entered using an MLS# - but is not required.

3 - The number/label can be used to navigate to more details and displays the number of currently created or loaded forms/documents etc.

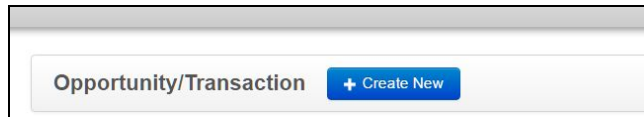
4 - Creation Date – system generated. When filtering on Active/Buyer/Seller, the Tiles will be displayed in creation date order.

5 – Estimated Closing Date. This is not a required field, but can be used as a filter. When filtering on Closings, the Tiles will be displayed in order showing the most recent estimated closing date.

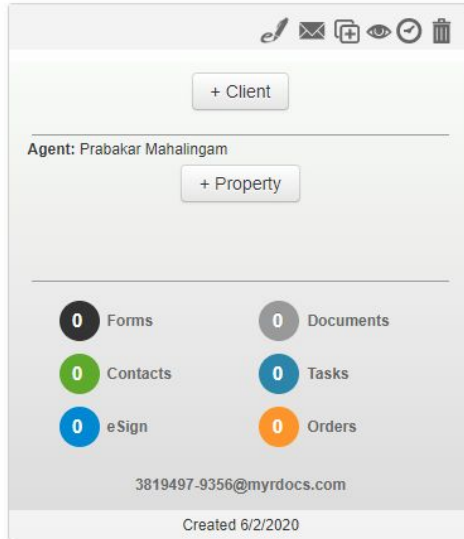


Creating a Tile

Click on the 'Create New' button on the dashboard.



A blank tile will appear in the top left position on the page.



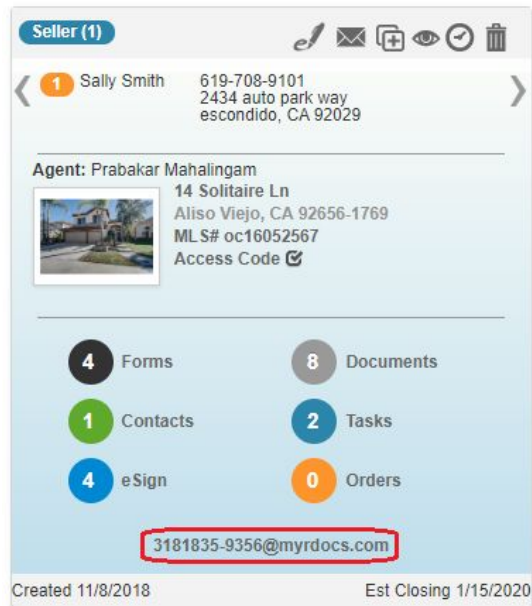
Click on the- '+Client' or '+Property' buttons to display the Add Client or Add Property screens.

Editing Client record: Once the Tile has been created, you can return to the Add Detail Input Overlay by clicking on the tile designation, i.e. Buyer or Seller, to edit the client record or add Contact Detail.

Editing Property record: Click on address line 1 of the property address to edit the Property Detail.

Tile Email Link

Each tile will generate a unique email address where you can email documents to the tile directly. If emailing large amount of documents, it will take several minutes and will be available in the documents page. To access the documents, click the Documents on the tile. This is a quick way to upload multiple documents.



Tile Actions

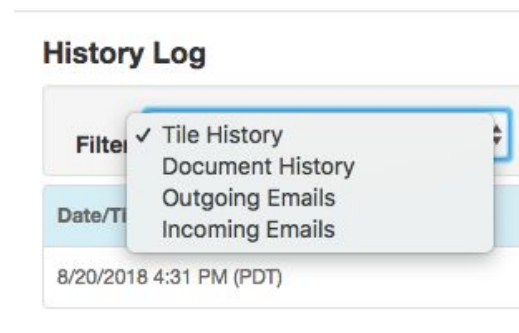
When a tile is created, a row of actions will be made available. You will be able to do a quick eSign, send email, copy tile, arcive tile, view history, and remove a tile. To learn more about the actions, view below.



Tile History Log

Logs can be seen when selecting the tile's log icon.

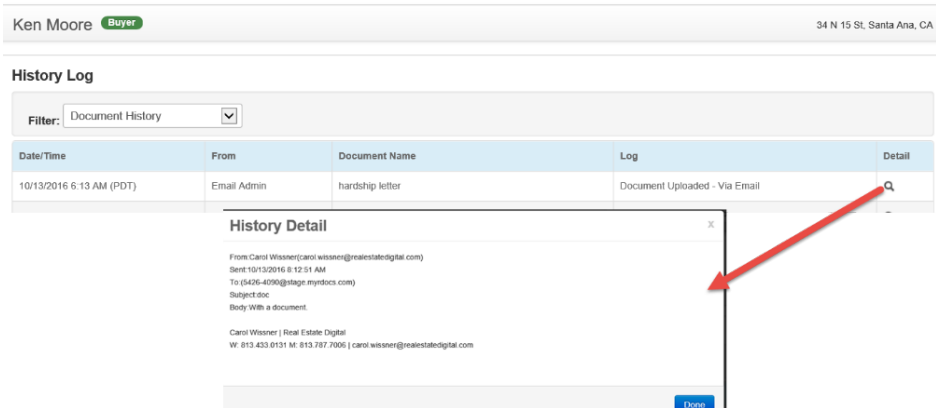
There are four types of logs available: Tile History, Document History, Outgoing Emails, and Incoming Emails.



- Tile History describes changes made to the tile, such as contacts and property information.


- Document History notes when and how documents were added to the system, when documents were viewed, and other document features.
- Outgoing Emails contains the date and time emails were sent, the recipients, and the contents of the email.
- Incoming emails describe the sender, date received, and the content of the email. If a document(s) was attached, the name of the document is noted as well.

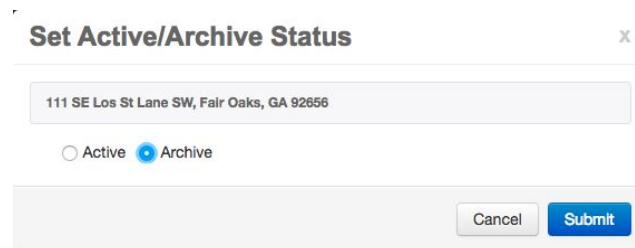
To see the detail of a log entry, click on the magnifying glass.



TIP: To add notes to a tile, such as the summary of a phone call, put those notes in an email and send it to the tile.

Active/Archive Tile


If you're no longer working on a transaction and do not want to keep it on the main dashboard, you can archive the tile. By clicking the icon  on the row of actions, an overlay will confirm whether or not you want to archive. After archiving the tile, you can click the icon again to make it active.



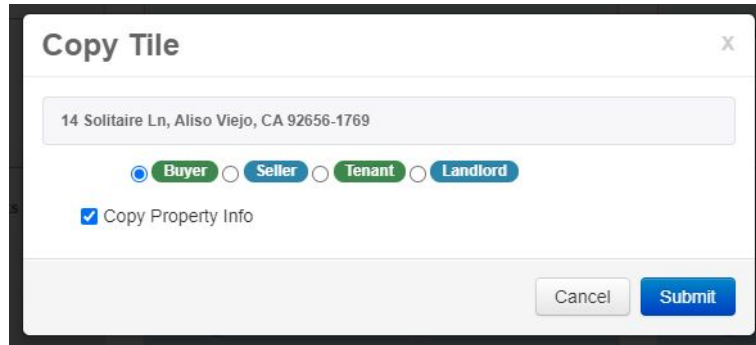
After submitting, the tile will be moved from the main dashboard and will be available on the Archived Dashboard. To access the Archived Dashboard, there is a filter tab called Archived.



Copy Tile

If you're working with the same contacts and do not want to retype the clients information, you can create a copy tile. By clicking the icon  on the row of actions, an overlay will appear for you to confirm what type of contact tile you want to create. By clicking submit, all contacts information for the tile will be copy to the new tile.


Note* Modifying a copy tile, will modify all existing tiles.



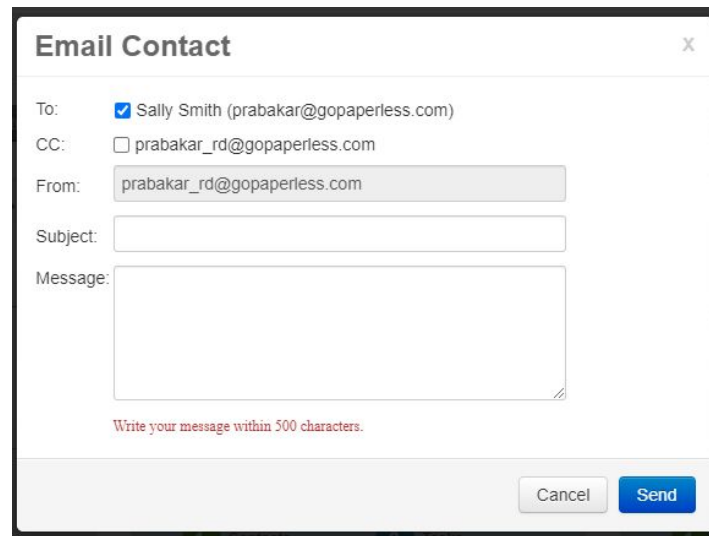
The 'Copy Tile' modal form displays the address '14 Solitaire Ln, Aliso Viejo, CA 92656-1769'. Below the address, there are four radio button options: 'Buyer' (selected), 'Seller', 'Tenant', and 'Landlord'. A checkbox labeled 'Copy Property Info' is checked. At the bottom right, there are 'Cancel' and 'Submit' buttons.

Email

If you want to quickly email a client without wanting to use your email service provider. rDocs offers the ability to email and track when the email was sent out. To view the log, please see History Log under


Outgoing Emails. By clicking the icon  on the row of actions, an overlay will appear for you to write your message.

Note* A contact must be created with an email address.



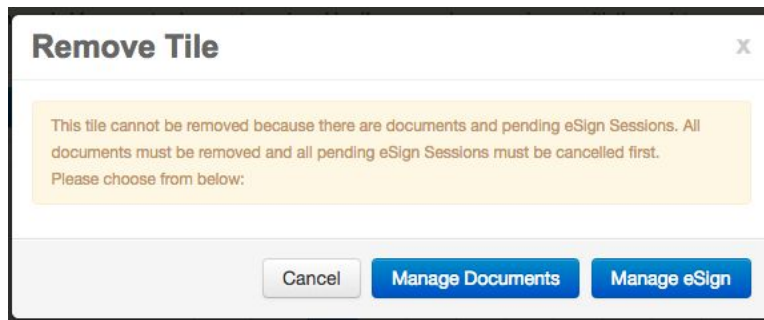
The 'Email Contact' modal form shows the recipient 'Sally Smith (prabakar@gopaperless.com)' selected with a checked checkbox. The 'CC' field has 'prabakar_rd@gopaperless.com' with an unchecked checkbox. The 'From' field is populated with 'prabakar_rd@gopaperless.com'. There are empty text boxes for 'Subject' and 'Message'. A red note at the bottom states 'Write your message within 500 characters.' At the bottom right, there are 'Cancel' and 'Send' buttons.

Delete

If you are no longer using the tile, you can delete the tile from the dashboard. By clicking the icon  on the row of actions, an overlay will confirm whether or not you want to delete the tile.




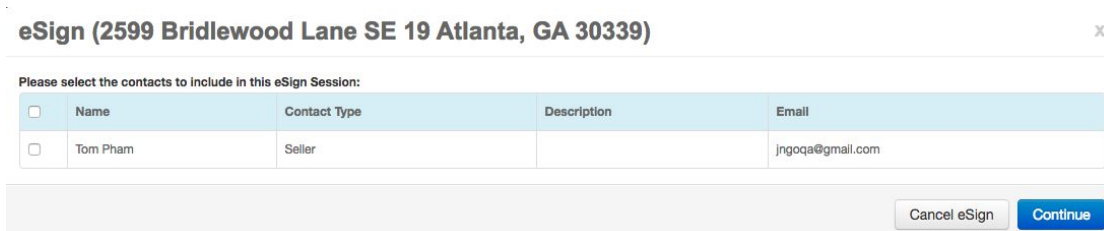
Note* You will no longer be able to access a tile if it is deleted. We recommend to archive instead of deleting.



Note* Transaction must not have any documents or eSign Session with the status Sent.

Quick eSign

If you want to quickly send out an eSign without needing to use the forms or documents, you can click the icon  on the row of actions. If you have contacts, an overlay will appear allowing you to select which contacts to eSign. If there are no contacts, you will automatically start an eSign session. To learn more about eSign, please see the Steps in the eSign Process.

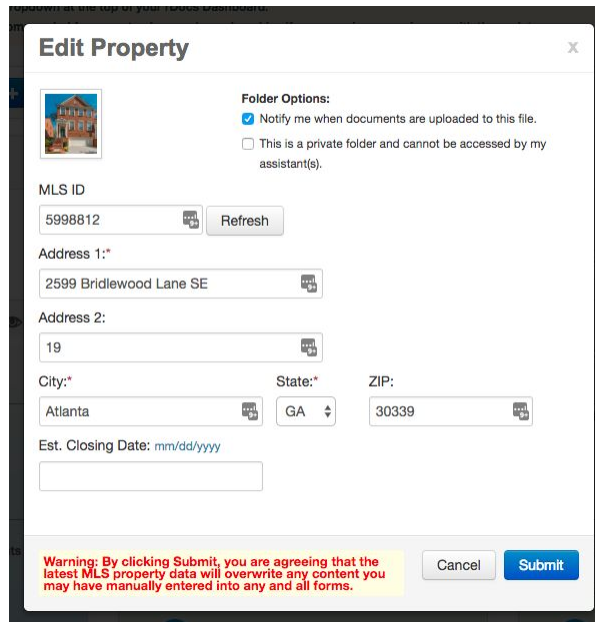


Property Details

Entering Property Details is as easy as submitting an MLS number – and the system will auto-fill the details. In addition, the property information will now populate the appropriate places on any form you select for that client.

Property Updates

If your site has the 'Pull Once' feature enabled, additional MLS updates will not be done automatically: when an agent entered information in a form, and the next MLS update took place automatically, the information from the MLS feed would overwrite the information in the form – even if the information in the feed was blank or incorrect. With the 'Pull Once' feature, when you return to the Property Center, you can click 'Refresh' to pull the most recent data from the MLS. To save that information and overwrite anything you've manually entered in forms that may have been updated by the Listing Agent, click Submit. If you don't want forms to be overwritten, don't click Submit.



Edit Property

Folder Options:

- Notify me when documents are uploaded to this file.
- This is a private folder and cannot be accessed by my assistant(s).

MLS ID: 5998812

Address 1:* 2599 Bridlewood Lane SE

Address 2: 19

City:* Atlanta State:* GA ZIP: 30339

Est. Closing Date: mm/dd/yyyy

Warning: By clicking Submit, you are agreeing that the latest MLS property data will overwrite any content you may have manually entered into any and all forms.

When you add a property manually, you must enter the street address, city, and state.

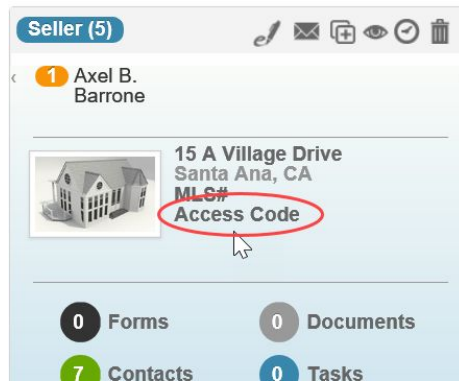
When working with a seller, you can add the property address you are getting ready to list. The address will populate the listing forms as long as it's associated with the seller.

NOTE: As previously mentioned, if you enter an estimated closing date, the Tile will be updated and you can filter by "Closings" on the Dashboard.

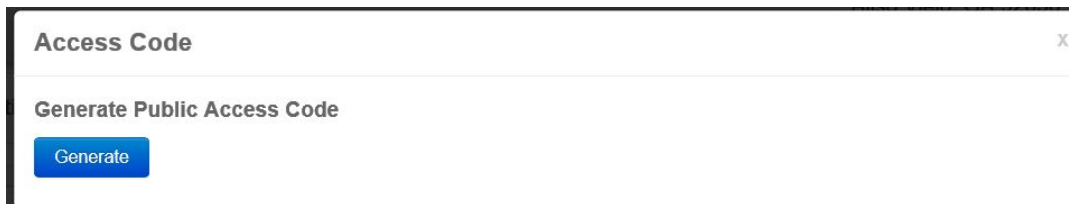
Public Access Code

You may want to share public documents without having to add a contact to a tile, or put a link to public documents on your own website. You can do that by creating a Public Documents Access Code – just click on the link shown.

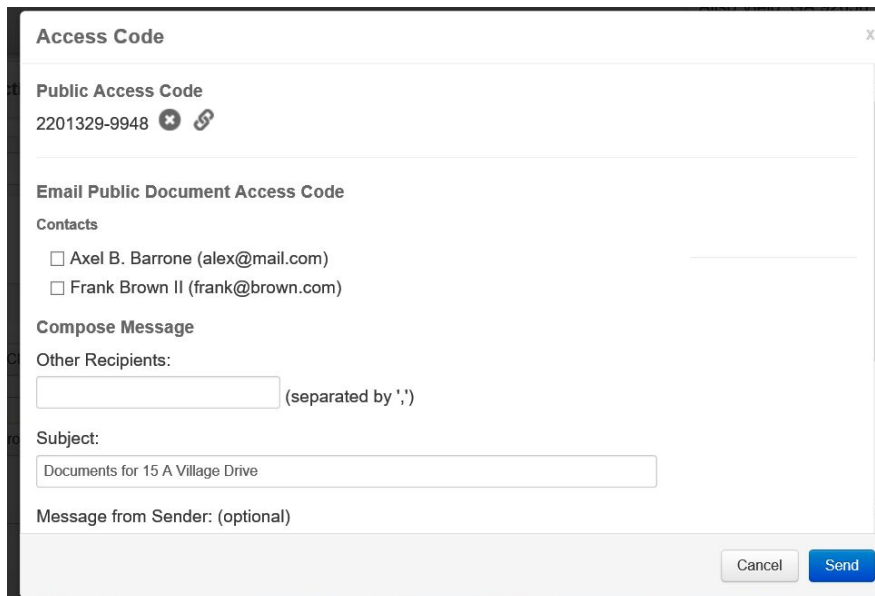
Note* Property is required to be able to generate an access code.



Click on Generate to create the code.



The access code will display. To delete the code, click on the X.



There are three ways to use the code:

1. Provide the code and the rDocs URL to anyone who should see public documents for this tile. Tell them to go to the URL and click on 'here' to view public documents.

Username
[input field]

Password
[input field]

Remember Me Log In


[Forgot Password](#)

[Click here to view public documents](#)

2. eMail the code. Select the recipients from the contacts on the screen and add others are desired. You can add a personal message; the email will contain instructions for using the code.

3. Put a link to public documents on your website. Click on the 'link' icon and a page will display a link you can place on your website.

Public Access Code

2201329-9948  

Place this link on your website to go directly to public documents for this file.

— <http://abcrealty.mydocs.com?regreq=1&sendemail=1&accesscode=2201329-9948>

Note: Removing the public access code will disable the link.

Users will be asked to enter contact information (name, phone and email) to access the documents. You'll be notified by email if the code is used.

***Note To make a document public, please see Document Privilege.**

Adding Contacts

Add Contact

Buyer Seller
 Tenant Landlord
 Buyer-Side Seller-Side

Search for existing
 Search

--- Select Description ---

First Name:* Last Name:*

Company:

Street Address:

City:

State/Province/Region: ZIP/Postal Code:

Alert: Saving this contact will overwrite any content you may have manually entered into form contact fields.

Cancel Submit

At least one Contact in a Tile must be assigned as the Buyer, Seller, Tenant or Landlord. Alternately, after the main Tile contact has been entered, the system will let you add additional contacts and designate them as “Buyer-or Seller-Side” contacts and include a description.

Search for existing
 Search

--- Select Description ---
Appraisal
Buyer Side Agent
Closing
Fraud
Home Inspection
Home Warranty
Homeowners Association
Insurance
Lead/Paint Inspection
Loan (Document)
Loans/Mortgage
Natural Hazard Disclosure
Pest Control Inspection
Seller Side Agent
Smoke Detector & Water Heater
Title
Warranty Deed

ZIP:
Phone: (Primary) (999-999-9999)

david.orav@realisteditorial.com 555-555-1234

When entering a contact, the minimum required details include: Buyer/Seller/Tenant/Landlord side and First Name/Last Name.

Contacts Action

After a contact is created, actions will be made available for the contacts such as account credentials, ability to upload, edit a contact, or delete the contact.

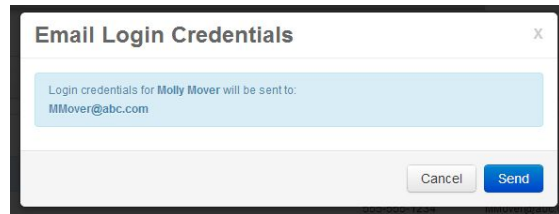


Providing Logins to rDocs





This will provide a personalized log-in and access for clients to their own tile – one tile for each transaction they are doing or have completed.

Clicking on the “Envelope” icon will open an Overlay screen to confirm the sending of log-in credentials to the selected Contact. The contact will receive instructions along with a URL to log-in and view the documents associated with their Tile.

NOTE: If the Contact already has received log-in instructions and credentials, they may use their log-in to view any of the transaction tiles you have with them.

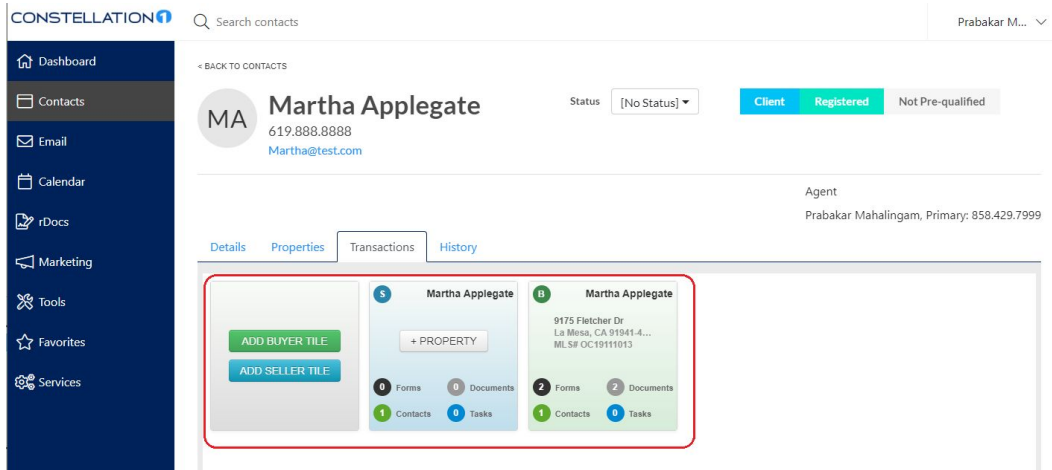


Uploading Privilege

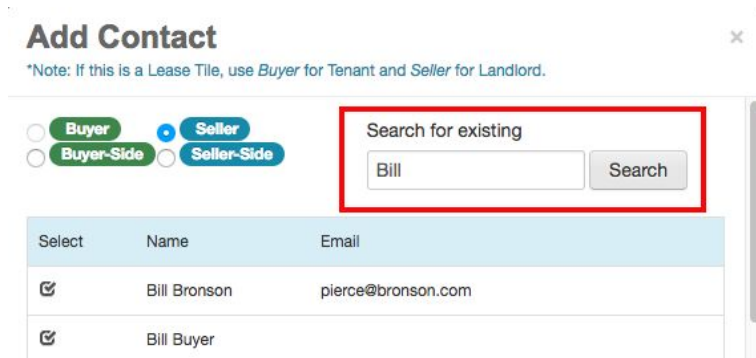
To give a contact the ability to upload documents to the tile, they need to click  which will toggle to . To disable the ability to upload for a contact, by clicking the , it will toggle back to .

Note for users of CRM: If you have an CRM account, and wish to access the contacts that have been previously uploaded or entered into your CRM account, there are two options to make sure you ‘tie’ the records together between the two systems.

- 1) Initiate your tile from the contact summary page in your CRM account. Just click on the ‘Add’ Buyer or Seller – this will create a new thumbnail tile in CRM (and an associated tile in rDocs). Clicking on any of the Form/Contact/Docs links will open a new browser window and take you directly to rDocs



- 2) Use the “Search for existing” search box to add more contacts to a tile and auto-fill the contact details from your CRM account.

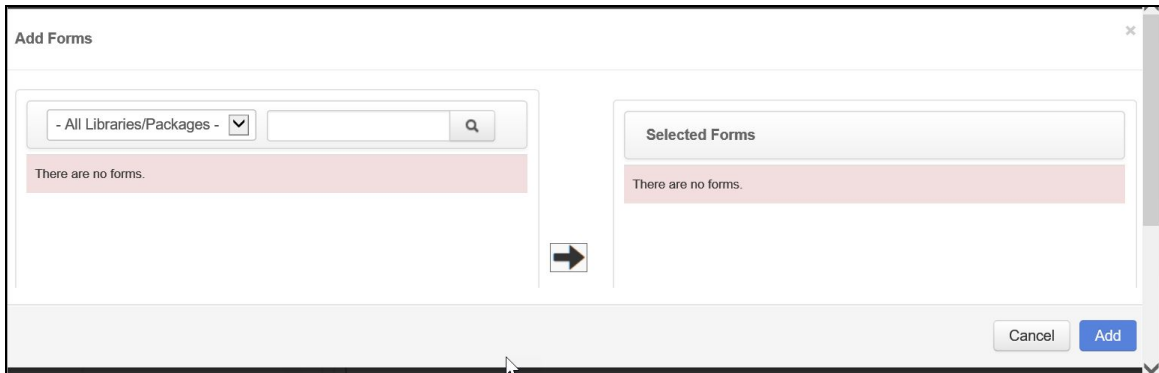


- 3) If you obtain new contact details after a tile is created, you’ll need to enter them in both the CRM and rDocs contact areas (if you want your CRM account to have these changes)

Working with Forms

If you have access to this functionality, rDocs Forms will allow you to add/edit forms to help you manage your transaction.

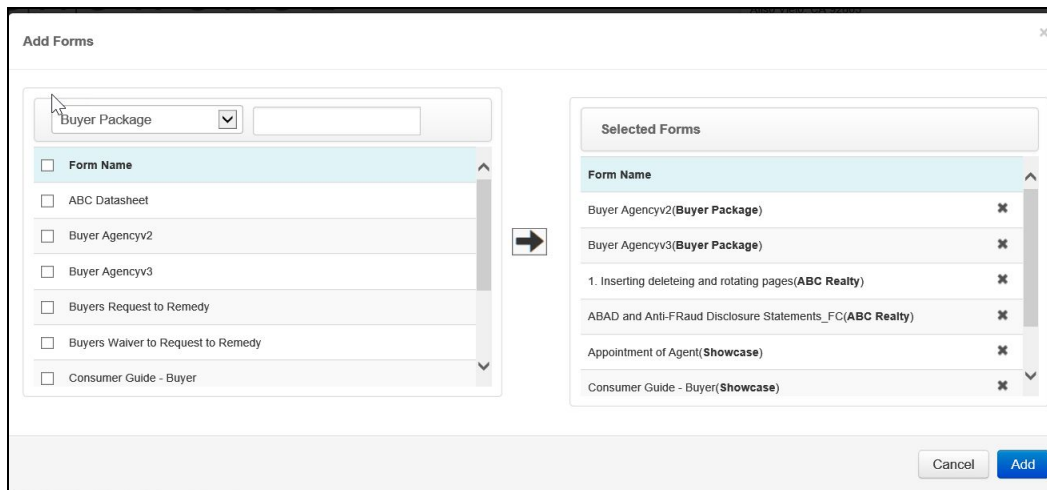
From the Dashboard, click on the word “Forms” (or the number next to the word) for any Tile to go to the *Forms Edit Page*.



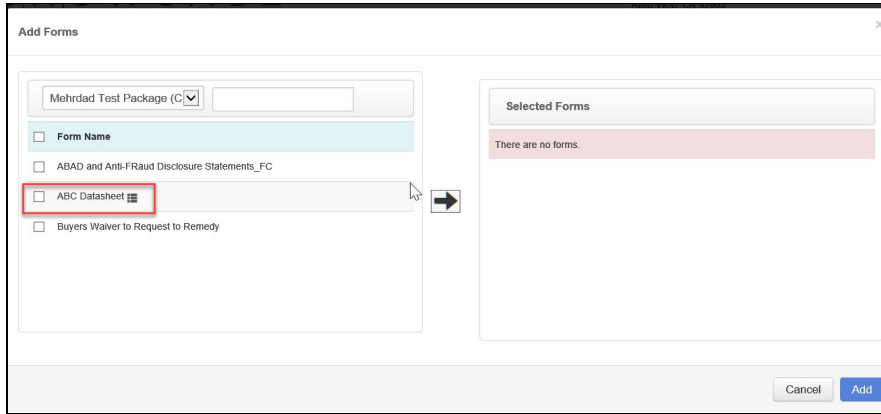
For a brand new tile (or if forms have not been added to the Tile yet), an overlay screen will appear showing potential the available libraries and forms.

To choose an individual form, select the box next to the form name, or you can select all forms in the open window by checking the box next to "Form Name"

You can also choose from the pre-set libraries (often organized in Buyer or Seller packages) to obtain Broker selected forms necessary to complete a transaction.



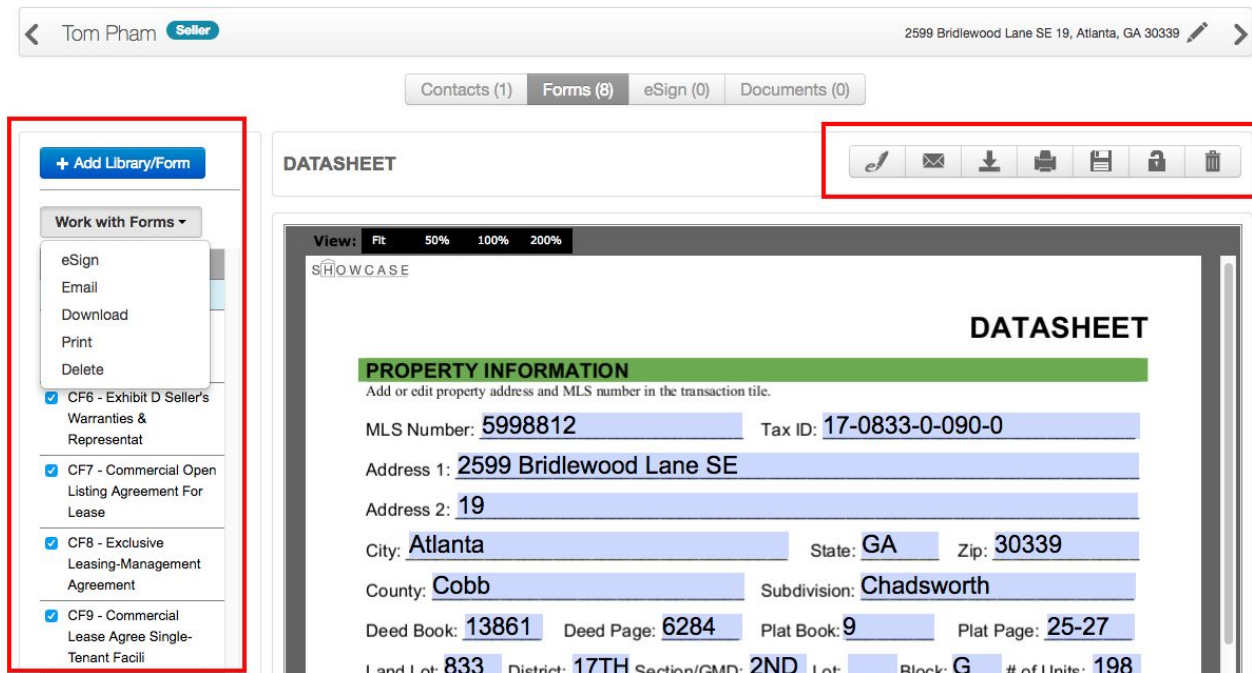
NOTE: When a parent form is being added to a library, an icon will display to tell the user that this is a parent form in a different package.



The Form Edit Screen gives you access to forms and the ability to manage and share forms. Note that during the rDocs site set-up, the rDocs team worked with your admins to ensure that fields in each form have been mapped to similar fields in other forms so if you enter a detail in one form (e.g. Listing Agent’s Name) any other form that has the same field will be updated.

rDocs makes it easy to pick from a library (and select multiple forms) or pick and choose the form you want associated with each file. The Library List dropdown allows you to expose groups of forms and then pick from all or individual forms.

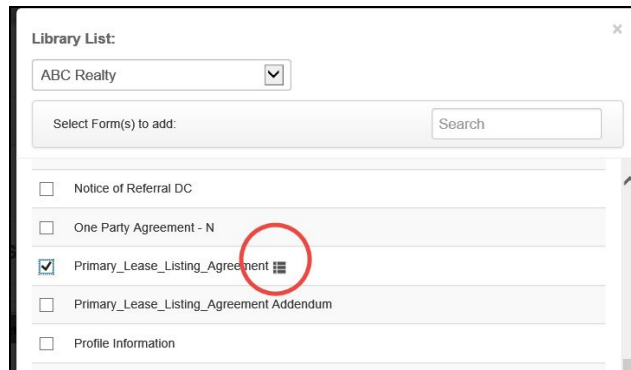
You can manage more than one form by selecting (check boxes on left) multiple forms and then choose the action from the dropdown menu or the icons row.



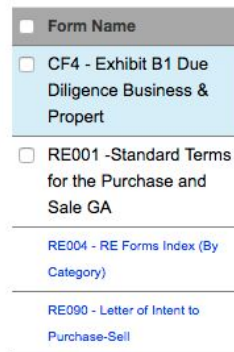
NOTE: To select a form to appear in the edit window, CLICK the “Name” of the form. The window to the right will refresh to display the select form.

Appended Forms

Some forms require the use of additional forms, which rDocs calls Appended Forms. While adding a form to a tile, there will be an icon indicating that it has forms appended to it, as shown below.



When this form is selected to be added to a tile, all the appended forms will automatically be added to the tile. The appended forms will appear below their primary form, with the blue font.



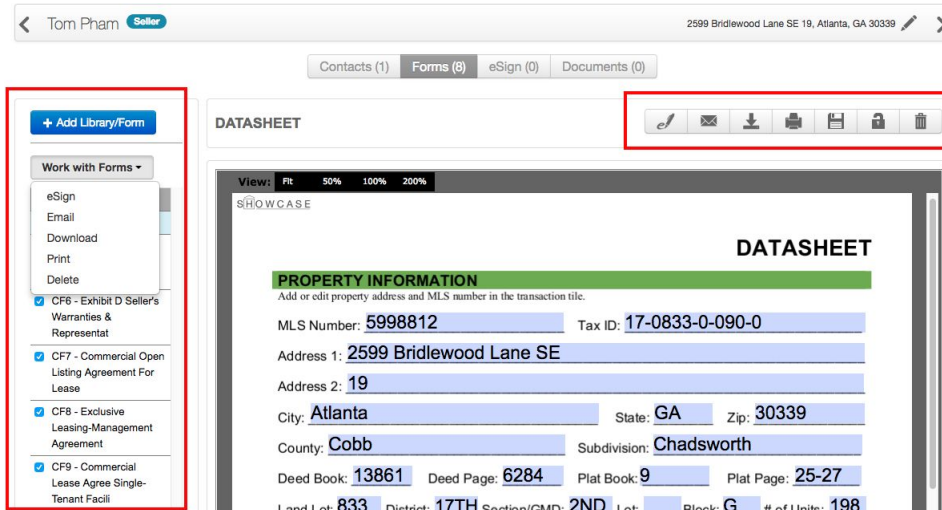
The appended forms will be automatically included when the parent form is “Emailed”, “Printed”, “eSigned” and “Deleted”.

The Appended Forms by themselves can be added to a tile just as any other regular form. You are not required to include the primary form, if you feel that you just need to work with the appended form.

Form Options

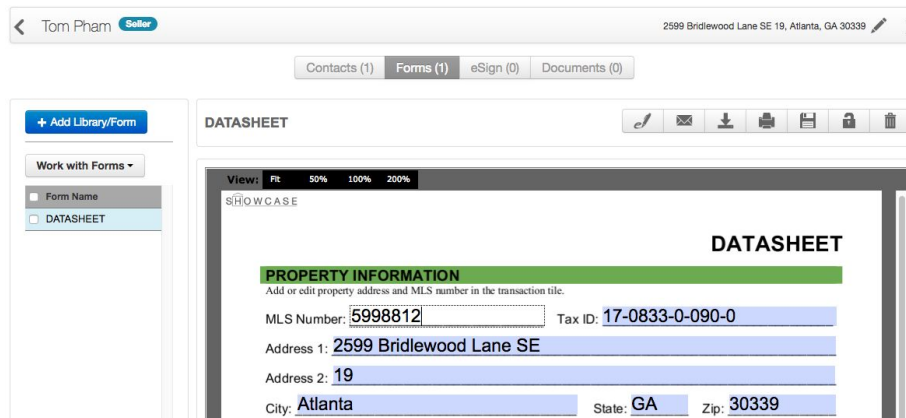
When you are ready to work with a form, you can use the menu bar in the upper right side or Work With Forms. Actions include:

- Locking the form – no changes to fields will be allowed.
- Send a form to be eSigned
- Email the form – a window will “pop up” (see illustration on next page)
- Print the form
- Download the form
- Delete the form
- Save the form – current version
- Team – Populating team information



Entering Form Fields

Place your cursor in the first field of any form and begin to type. You can use your “Tab” keyboard key to move to the next field or simply place your cursor using your mouse.



Emailing a Form

When choosing to email a single form (or choosing multiple forms and using the “Work with Forms” dropdown,) an “overlay screen” will pop up. **NOTE: the combined size of all documents in an outgoing email from rDocs cannot exceed 25mb.**

You can select the recipients to include in the email and send a personal note. You can add additional recipients as well as contacts already in the tile. **NOTE: If you add additional contacts to the email, they are not added to the tile.**

The sequence of forms can be modified: just click on a form name and drag and drop it to the desired location. You can choose to send the forms as individual attachments or as a single PDF. If you select the Single PDF option, you need to name the package of forms being sent. You can remove the selected forms if you decided to not email them out by clicking the “X” next to the forms name.

Note: Depending on the number of forms being emailed, the servers may take up to 2 minutes to send the emails.

Locking Forms

To lock a form, simply choose the form and then the “lock icon” in the upper right – this will ensure that any future changes in another form, will not be reflected in the locked form. An indicator will display next to the lock form name.

***Note Lock only works for the current form you are viewing.**

Printing Forms

When you select a form(s) to print, using the Work with Forms dropdown, rDocs will merge the PDF and the print console will display. The sequence of forms in the package can be modified: just click on a form name and drag and drop it to the desired location or click “X” to remove the forms from the list.

Note* If you have selected more than 10 forms for print, the forms will be sent to the Queue

Print Forms



The following forms will be merged into a single printable document. To change the order of the forms in the printed version, please drag and drop the forms names until you have the desired sequence.

| Form Name | |
|---|---|
| RE004 - RE Forms Index (By Category) | X |
| RE090 - Letter of Intent to Purchase-Sell | X |

Cancel Print

After clicking Print, the print console from your computer will display.

The screenshot shows a print console on the left and a preview of a form on the right. The print console includes the following settings:

- Print: Total: 11 sheets of paper. Buttons: Cancel, Print.
- Destination: 10.146.72.102 - Work KONICA MINOLTA 454e ... Change...
- Pages: All, e.g. 1-5, 8, 11-13
- Copies: 1
- Paper size: 8 1/2x11
- Scale: Fit to page, 96
- Print using system dialog... (⌘P)
- Open PDF in Preview

The form preview is titled "COMMERCIAL LEASE AGREEMENT AMENDMENT #". It includes a "SHOWCASE" logo and "2018 Printing" text. The text of the form includes:

WHEREAS the undersigned parties have entered into a certain Lease Agreement ("Agreement") the date of _____ for the lease of real property located at: 111 Main St, 20 El Monte, Georgia, 30506 _____ and _____;

WHEREAS the undersigned parties desire to amend the aforementioned Agreement, it being to the mutual benefit of all parties to do so;

NOW THEREFORE for and in consideration of the sum of Ten Dollars (\$10) and other good and valuable consideration the receipt and sufficiency of which are hereby acknowledged, the parties hereto agree to modify and amend the Agreement as follows:

[Note: The following language is furnished by the parties and is particular to this transaction.]

Additional pages are or are not attached.

It is agreed by the parties hereto that in the event of a conflict or inconsistency between the Agreement and this Amendment, the terms of this Amendment shall control. All of the other terms and conditions of the aforementioned Agreement shall remain in full force and effect other than as modified herein. Upon execution by all parties, this Amendment shall be attached to and form a part of said Agreement.

THIS FORM IS COPYRIGHTED AND MAY ONLY BE USED IN REAL ESTATE TRANSACTIONS IN WHICH _____ IS INVOLVED AS A REAL ESTATE AGENT. UNAUTHORIZED USE OF THIS FORM MAY SUBJECT THE USER TO PENALTIES AND DAMAGES. CONTACT THE USER ASSISTANCE LINE REFERRED TO: THE GEORGIA ASSOCIATION OF REALTORS AT (770) 481-1431.

Copyright 2018 by Georgia Association of REALTORS, Inc. GP 11, Commercial Lease Agreement Amendment, Page 1 of 2, 05/2018

Download Forms

When you select a form(s) to download, using the Work with Forms dropdown, rDocs will prepare a package of those forms and you'll be asked to name that package. The system will be available as the package is being created, which can take several minutes. The sequence of forms in the package can be modified: just click on a form name and drag and drop it to the desired location. If you want to remove one of the selected forms, you can click the "X" next to the form name.

Note* If you have selected more than 10 forms for print, the forms will be sent to the Queue

Download Forms ×

*Please enter the name of the merged PDF in the textbox above.

The following forms will be merged into a single printable document. To change the order of the forms in the printed version, please drag and drop the forms names until you have the desired sequence.

| Form Name | |
|---|---|
| 2018 Table of Contents 01.01.18 | × |
| RE004 - RE Forms Index (By Category) | × |
| RE090 - Letter of Intent to Purchase-Sell | × |
| RE091- Letter of Intent to Lease | × |

After clicking Download, the forms will be merge as a single PDF and will be downloaded to your browser.

Forms Queue

If you have selected more than 10 forms for Download or Print, the merge PDF will be sent to the Queue. You will be asked to name the package. The package will be available in several minutes as it is being created. The sequence of forms in the package can be modified: just click on a form name and drag and drop it to the desired location. If you want to remove one of the selected forms, you can click the “X” next to the form name.

Send to Queue ×

You have selected more than 10 forms to merge and save as PDF. These forms must be merged into a single PDF and will be available for download within a few minutes.

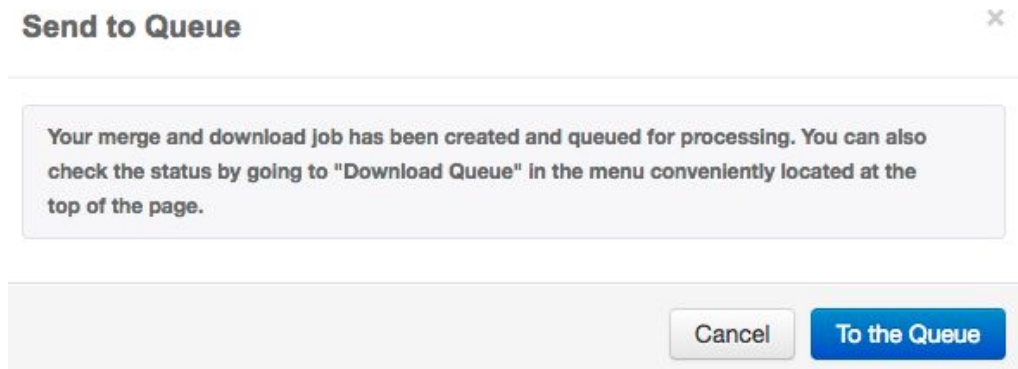
*Please enter the name of the merged PDF in the textbox above.

The following forms will be merged into a single printable document. To change the order of the forms in the printed version, please drag and drop the forms names until you have the desired sequence.

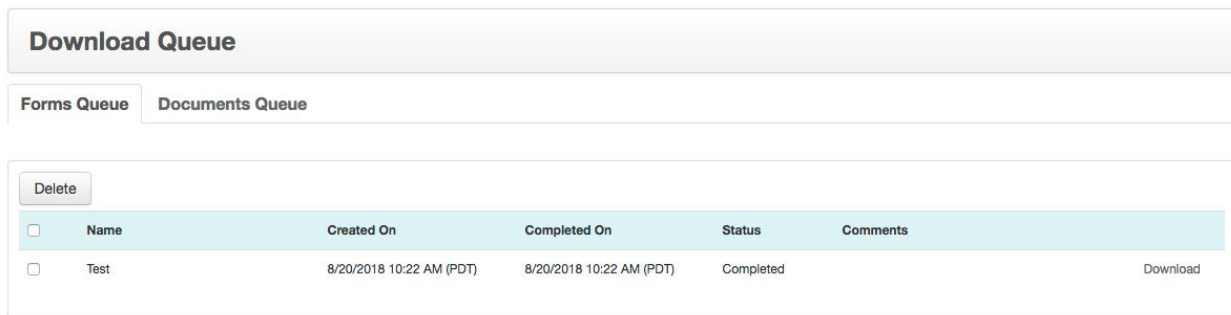
| Form Name | |
|---|---|
| 2018 Table of Contents 01.01.18 | × |
| * B1 - Protect Yourself When Selling a House | × |
| CF11 - Commercial Lease Agreement Amendment | × |
| CF12 - Commercial Sublease Agreement | × |
| CF13 - Commercial Sublease Consent Agreement | × |
| CF14 - Commercial Lease Guaranty | × |
| CO11 - Referral Authorization | × |
| CO12 - Agree Between New Broker & Former Broker | × |

After clicking “Send to Queue” you will have the option to go see the Queue or continue where you left off.

Note* We recommend no more than 25 forms to be Send to Queue

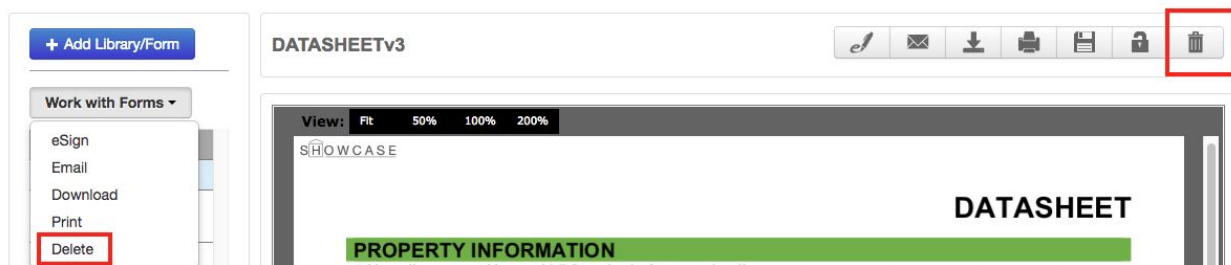


If you click “To the Queue”, you will be sent to the Forms Queue. If the package is complete, there will be a download link. If it’s still in progress, the system will indicate that and the download link will not appear. A completed package will consist of all of the forms in the package, as a single PDF.




Delete Forms

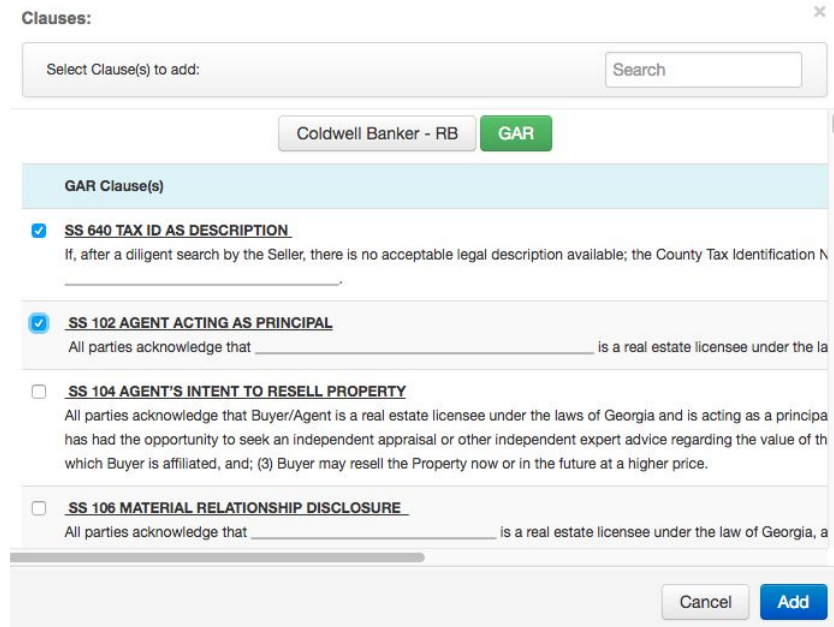
There are 2 ways to delete forms which are the row of icons or from work with forms menu.



To delete forms, you need to select forms from the list of forms and choose one of the two ways to delete forms.

Clause

If a form is setup with clauses, an icon  will be made available. By clicking the icon, an overlay popup will appear. By checking the checkboxes, you will be able to add the selected clauses to the current form.



Clauses:

Select Clause(s) to add:


Coldwell Banker - RB **GAR**

GAR Clause(s)

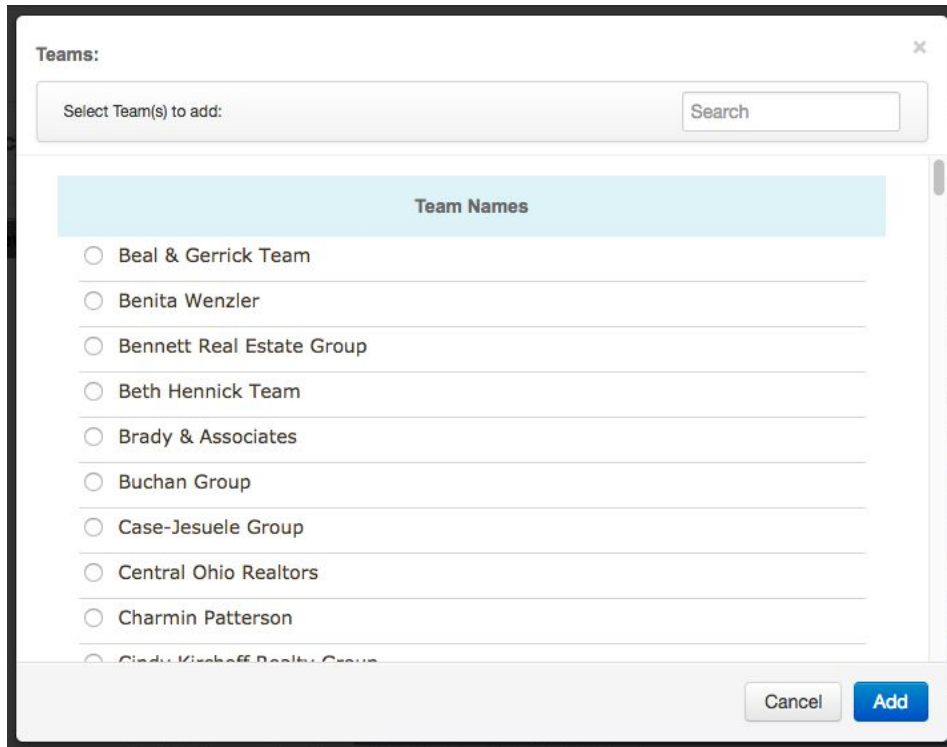
- SS 640 TAX ID AS DESCRIPTION**
If, after a diligent search by the Seller, there is no acceptable legal description available; the County Tax Identification N _____.
- SS 102 AGENT ACTING AS PRINCIPAL**
All parties acknowledge that _____ is a real estate licensee under the la _____.
- SS 104 AGENT'S INTENT TO RESELL PROPERTY**
All parties acknowledge that Buyer/Agent is a real estate licensee under the laws of Georgia and is acting as a principa _____ has had the opportunity to seek an independent appraisal or other independent expert advice regarding the value of th _____ which Buyer is affiliated, and; (3) Buyer may resell the Property now or in the future at a higher price.
- SS 106 MATERIAL RELATIONSHIP DISCLOSURE**
All parties acknowledge that _____ is a real estate licensee under the law of Georgia, a _____.

Cancel **Add**

Team

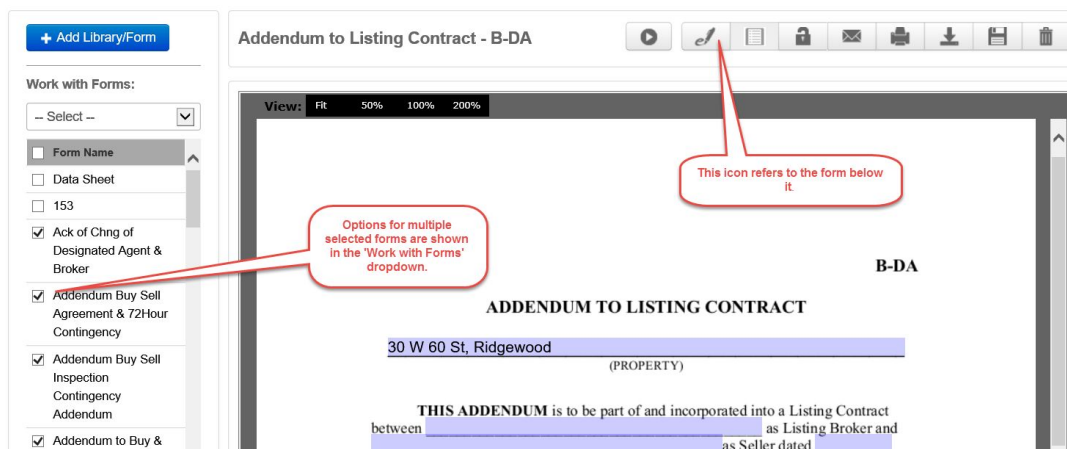
If a form is setup with team, an icon  will be made available. By clicking the icon, an overlay popup will appear. By checking the checkboxes, you will be able to add the selected team to the current form.

Note* Clause and Team cannot be enabled at the same time for a form. The form can have either Clause or Team, not both.



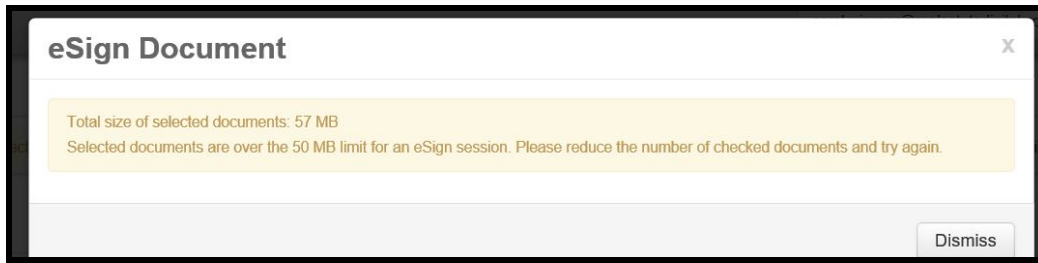
eSign

To start an eSign session, use either the individual forms button or the group forms drop-down menu and select “eSign” from the list. This will open up a window with the steps needed to complete the eSign session.

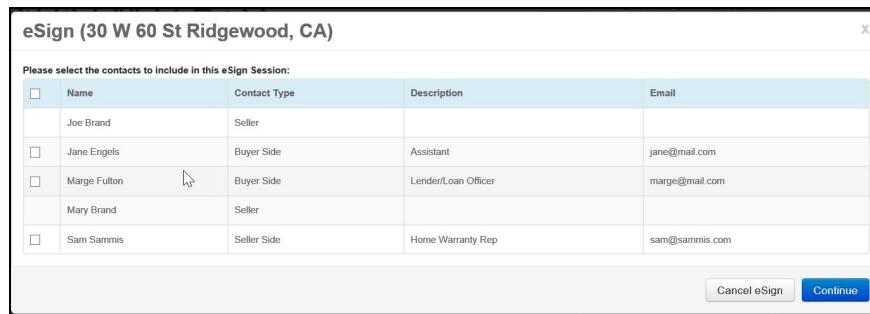


If forms are selected on the left, clicking on the forms icon above the form will launch eSign with the selected forms.

Note: The total combined document sizes in a single eSign session cannot exceed 50MB, or 25MB for a single file. An error message will display if the size is exceeded.

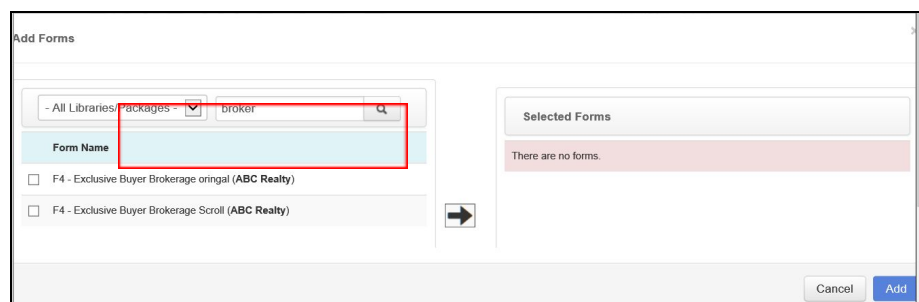


Before the eSign process begins, a page is displayed showing all of the contacts in the tile. You can select those who are to be signers in the session. You can add additional signers in Step 2. While all contacts will display, you can only select those with email addresses.



Forms Tips & Tricks:

- When working with a form, click the “Save” icon before closing the browser or navigating to another site
- Use the form named, “Data Sheet” to quickly enter in details. It has a master list of all fields and is mapped to the remaining forms.
- When adding a library, you can use the “search” window to quickly find the form you want to add – e.g. typing “broker” causes the system to show only forms with these letters in the name:

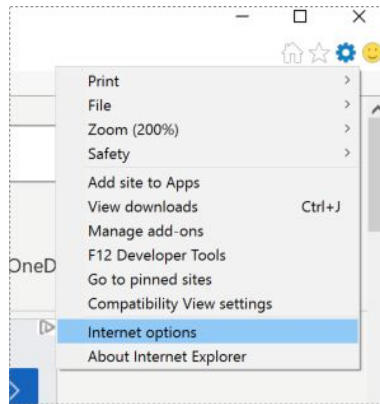


Then just select the box next to the form(s) you wish to have associated with the file and click the right arrow. When you’ve selected all the forms needed, click the “Add” button.

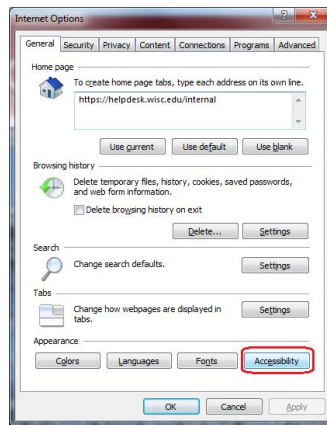
Internet Explorer Users

If you are using Internet Explorer and find that the font in forms is too small to read, click on the Tools button on the upper right hand corner of the Internet Explorer screen.

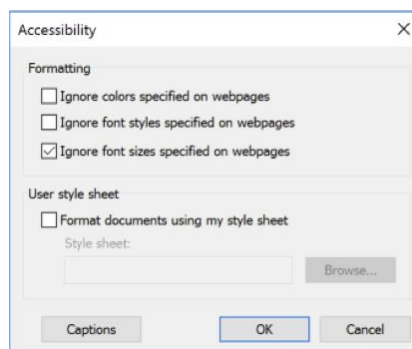
Select Internet Options.



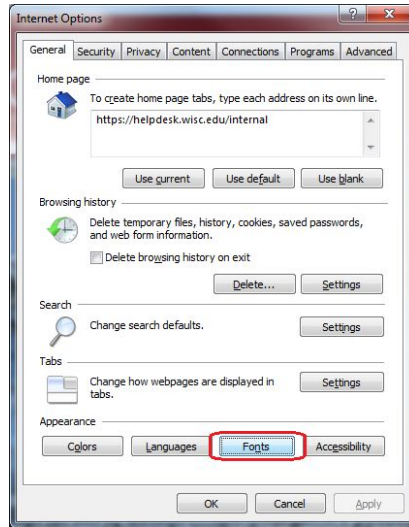
In the General tab, click on Accessibility.



Make sure the boxes for "Ignore font sizes specified on webpages" are checked.



Click OK. In the Internet Options window, select Fonts.

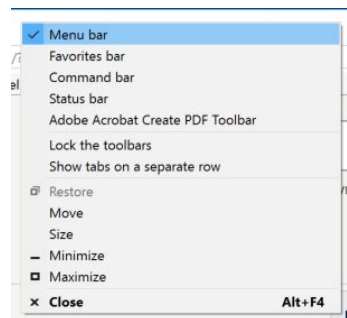


Under "Webpage font," select your desired default font.

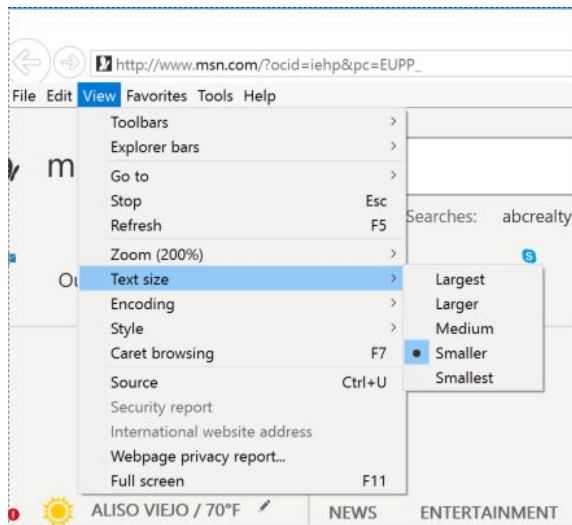


Click OK.

Click OK again to exit the Internet Options box. Click the Page button on the upper right hand corner of the screen. To access page, you need to have the Command Bar. (Right click Internet Explorer).



Click Text Size and select your desired default font size.

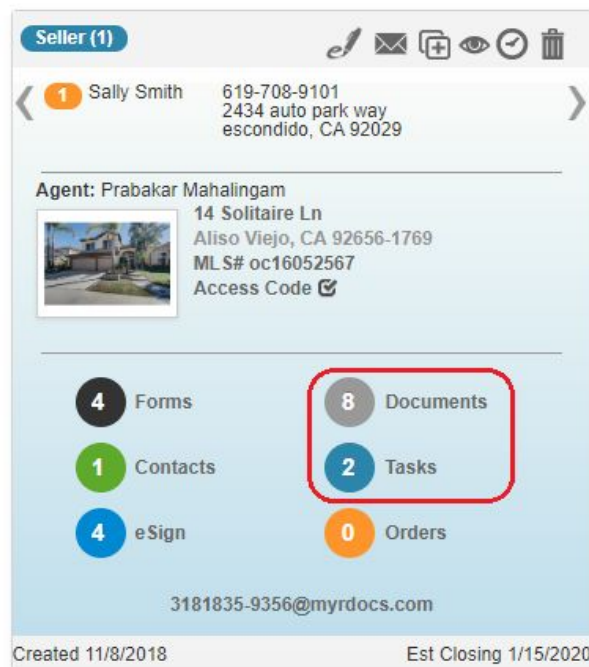


Working With Documents

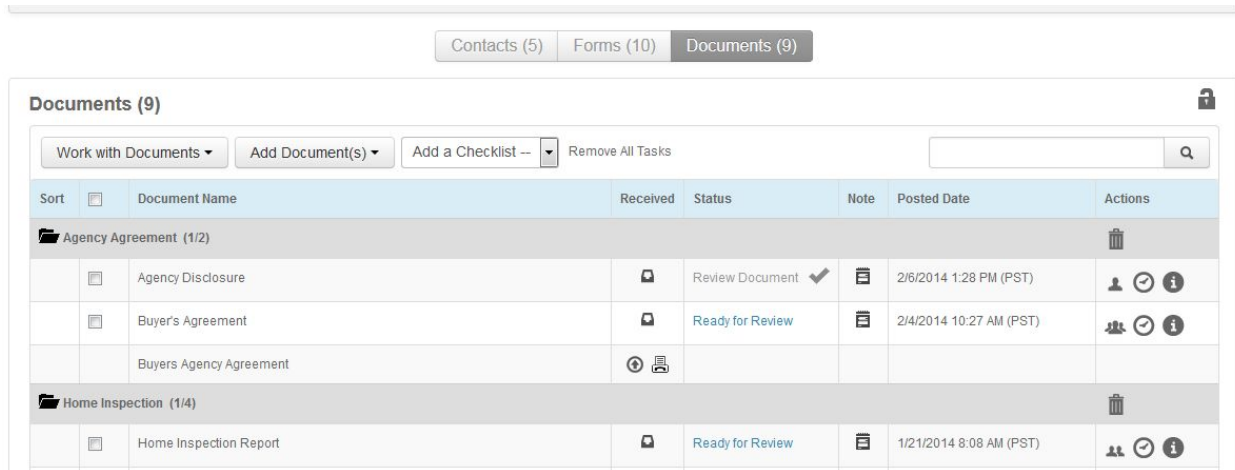
rDocs provides a module that facilitates online document management. If you have this functionality enabled for your account, the following features can be accessed.

Accessing Documents

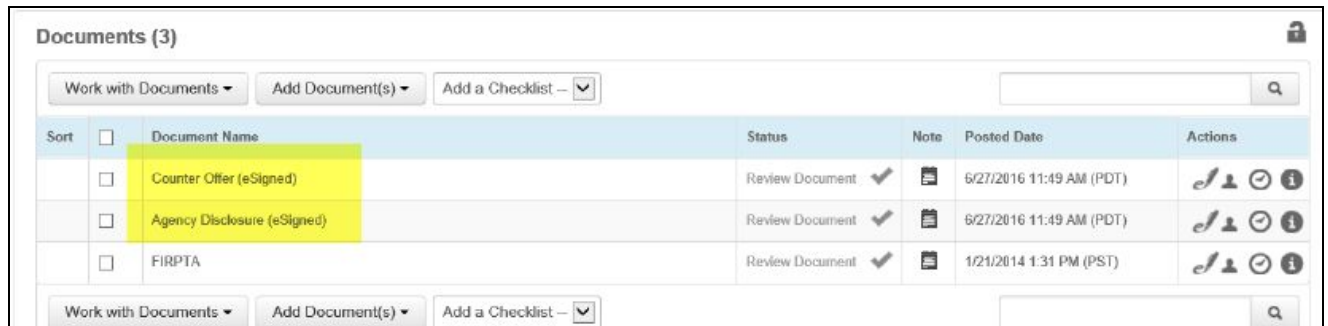
From the Dashboard, you can click on the word, “Documents” (or the number) or if tasks have been created, the word “Tasks” to navigate to the document management tools.



The Documents screen provides easy access to tools and documents including the ability to upload, name, rename, move, add/change viewing or privacy privileges and see historical notes about the document.



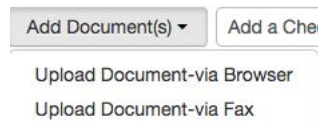
NOTE: Forms that are eSigned are returned to the Documents page without changing the name. Since there may be other documents with the same name on the Documents page, it can be confusing to tell which one is the signed form. Therefore, eSigned forms returned to the Documents page will display '(eSigned)' after the document name, as shown below.



The system will still correctly match document names to the appropriate placeholder in rDocs checklists. If the document is emailed, the eSigned notation will not appear as part of the document name. It is only visible on the documents page for the user's convenience.

Adding Documents

There are three ways to upload a document – two are available from this dropdown.



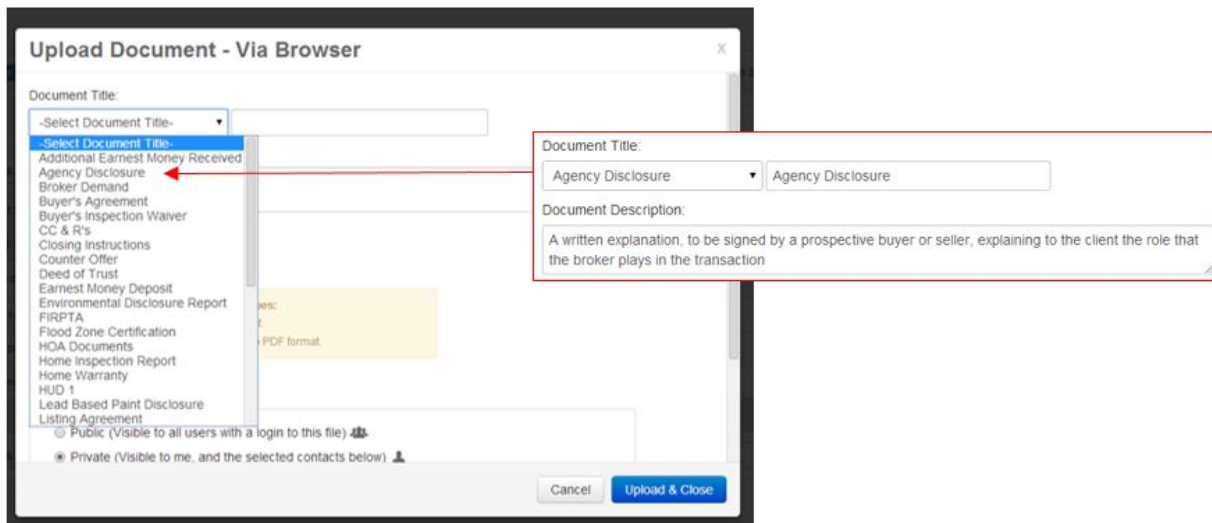
1. Upload from your hard drive via the internet browser.
2. Create a Fax cover page that can be used to Fax a document into the rDocs application.

3. Use the email address shown on the transaction's Tile. You can send multiple documents in each email and they will be placed within a checklist or the General Folder.

When an email is received, documents that are attached are placed in the Document center and the email content is saved in the tile's log. If there are no documents attached, the content of the email is still saved in the log.

Naming Documents and adding Document Description

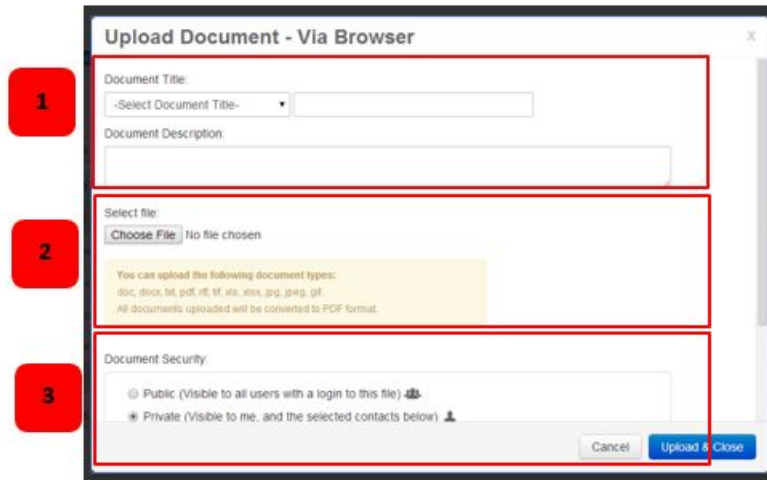
rDocs can assist you in your document naming and description by letting you choose from the Master Document Name List (a description will automatically be associated with the name – and the name/description will be visible to your client should they look at a document in their rDocs account). You can give a different name to your document by entering it on the textbox beside the dropdown list.



Uploading Documents via Browser

To do this, select “Upload Documents via Browser” from the dropdown.

This screen overlay provides you with three key features in document management:

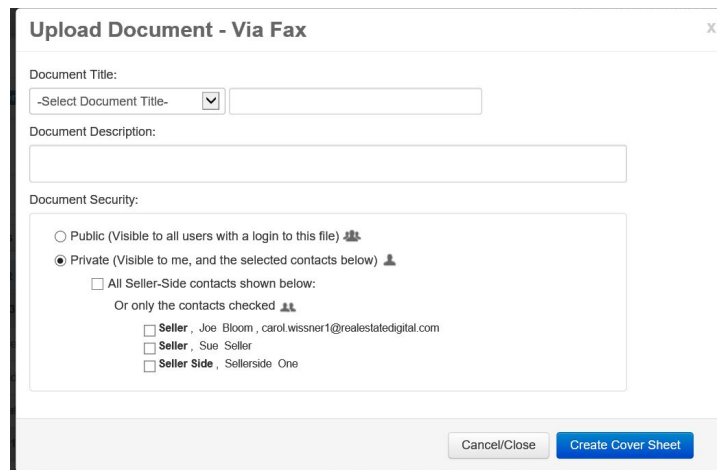


1. Naming and Description
2. Upload Selection
3. Document Security (viewing privileges)

Uploading Documents via Fax

Select the 'Upload Document-via Fax' option on the Documents page.

Select the document name and viewing privileges to be applied when the faxed document is received, as you would when uploading via browser and click the 'Create Cover Sheet' button.



An option to view and/or print the cover sheet will appear at the bottom of the box.

- Seller , Joe Bloom , carol.wissner1@realest
- Seller , Sue Seller
- Seller Side , Sellerside One

[Click to view cover sheet: Fax Cover Sheet](#)




Print the cover sheet and use it to fax the appropriate document to the toll-free number shown at the top of the page.

Fax Cover Sheet

ABC Realty PROD
Fax To: (866) 231-5911
Please place this cover sheet on top of document.

Date Prepared: 8/29/2016 # of Pages: _____

Process ID: 222147


Notes:


File ID: 2027660
Site ID: 218207
User ID: 460382 - Carol Wisner
Display Name: Flood Zone Certification
Address: 56 Blake Dr, Santa Ana, CA
MLS #:


Document Security Settings


The last “Optional” step is to set security or viewing settings. The rDocs System will always default to a setting of “Private” for all uploaded, emailed or faxed documents. If you’d like to make the documents available to other parties, there are three methods for providing access.

Document Security:


Private (Visible to me) 

Public (Visible to all users with a login to this file) 

Shared (Visible to the roles checked below) 

All Buyer-Side contacts shown below:
Or only the contacts checked 









Buyer, Joe Buyer
 Buyer Side, Sara Buyer

All Seller-Side contacts shown below:
Or only the contacts checked 

Seller Side, Mary Dunn

You can allow anyone with a log-in to see the file (this includes the ability to provide a temporary access code as shown below). Alternately, you can choose specific contact(s) to have access.

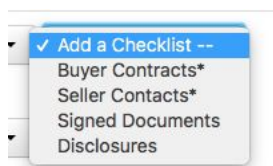
All uploaded files will display the Security or Privacy Setting in the document view.

| | | | | |
|--------------------------|-------------------|---|-------------------------|---|
| <input type="checkbox"/> | Agency Disclosure |  | 2/6/2014 1:28 PM (PST) |    |
| <input type="checkbox"/> | Buyer's Agreement |  | 2/4/2014 10:27 AM (PST) |    |

If you need to change a setting at the document level, just click on the Security icon, change the setting and save.

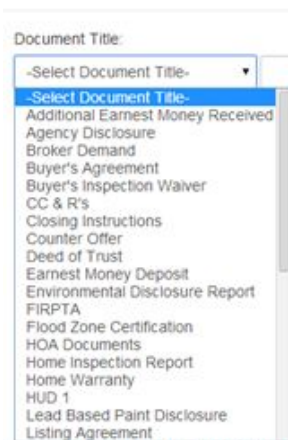
Checklists

Checklists can be added by you – or the Broker Administrator. These identify specific tasks or documents that must be uploaded in order to complete a transaction. When a document is received or uploaded to rDocs, the Task can be auto-marked as completed when naming rules are used.



To add a checklist to your documents, there will be a dropdown menu to select which checklist to add. A checklist or ToDo item can include tasks or a document name. When you create checklist items, the Tasks count and quick link will show on the Tile. To learn how to create checklist, please see [Creating a Checklist](#).

Your account will have a Master Document Name list (set-up by the Broker Admin). This contains the names and general descriptions of basic documents in a transaction. The name list can make it easier for you to “rename” documents as you upload or work with them in rDocs. A sample list is shown here.



This naming list will be found in a dropdown when you upload a document (via Browser or Fax).

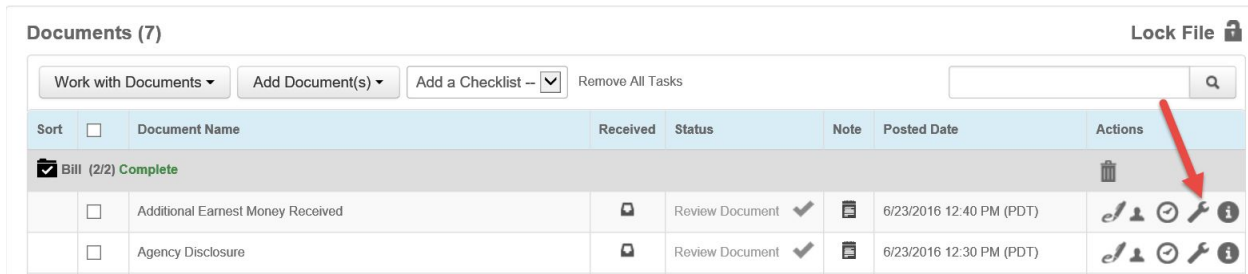
The matching names can also be found in the Create Checklist and can be used when creating personalized checklists.

Note* Broker Admin that creates a shared checklist will be noted with *. If an agent adds a broker provided checklist, you will not be able to remove it. Only Broker Admin can remove the checklist.

The Document Splitter

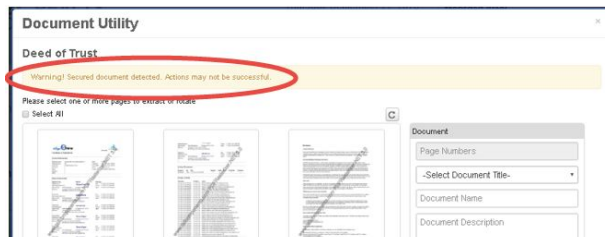
Documents can now be split apart and saved as separate documents. Pages can also be rotated if necessary. If a document has been uploaded via the rDocs eSign platform or has password security, the Document Splitter icon will be grayed out because those documents cannot be modified.

The splitter is accessed by clicking on the tool icon.



Clicking on the icon opens the Document Utility. The first six pages of the document are displayed as thumbnails, with the ability to move thru pages below the thumbnails.

NOTE: Some documents have security settings which cannot be seen until the splitter attempts to open them. If this occurs, you will see an error message under the document name.



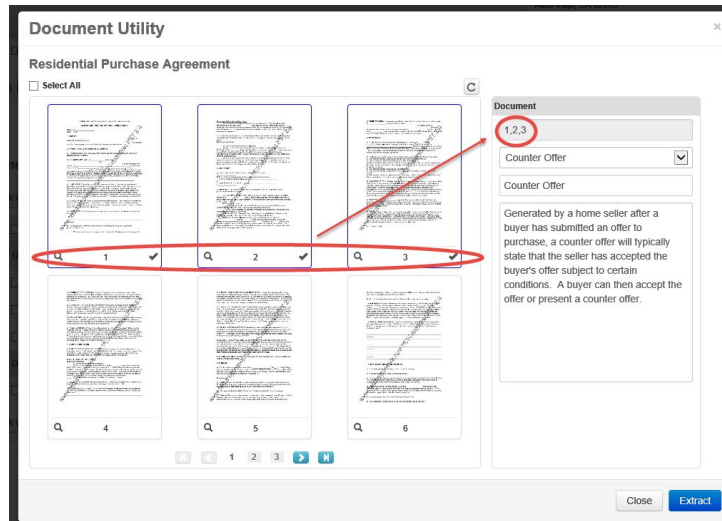
To rotate one or more pages 90 degrees to the right, select the desired pages by clicking on the thumbnail, and then click on the 'rotate' icon to the top right of the thumbnails.

To extract pages into multiple documents, select the pages to be extracted by clicking on each thumbnail desired. The pages selected (they do not need to be consecutive) will display to the right, and you can select a name for the new document. (To enter a custom name, just type it in the 'Document Name' box.) Click 'extract' at the bottom of the screen.

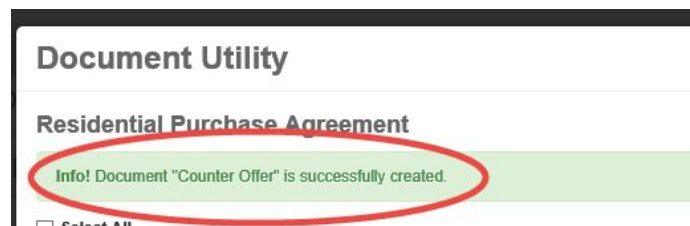
NOTE: While pages extracted do not have to be sequential (for example, you can choose pages 1, 3 and 7,) they cannot be rearranged in a different order.

You can use the magnifying glass option to enlarge the page if you need to see it more clearly.

HINT: If you are just removing a fax cover sheet, you can click the 'select all' box to mark all of the pages to be extracted, and then uncheck the first page and split the document to the desired activity. The cover sheet will not be included.



When the document has been extracted, a message will appear at the top of the screen.

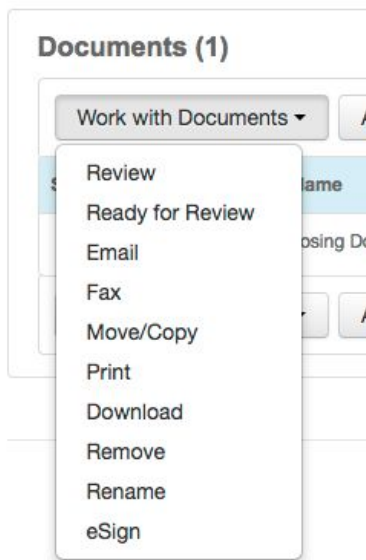


When all desired documents have been extracted, click 'Close'.

NOTE: The newly created documents appear in the Document Center with the viewing privilege of 'Private'. The original document remains in the document center untouched and can be removed if desired.

Documents Actions

When selecting a document or choosing more than one, you can perform any of the actions in the "Work with Documents" drop-down list.



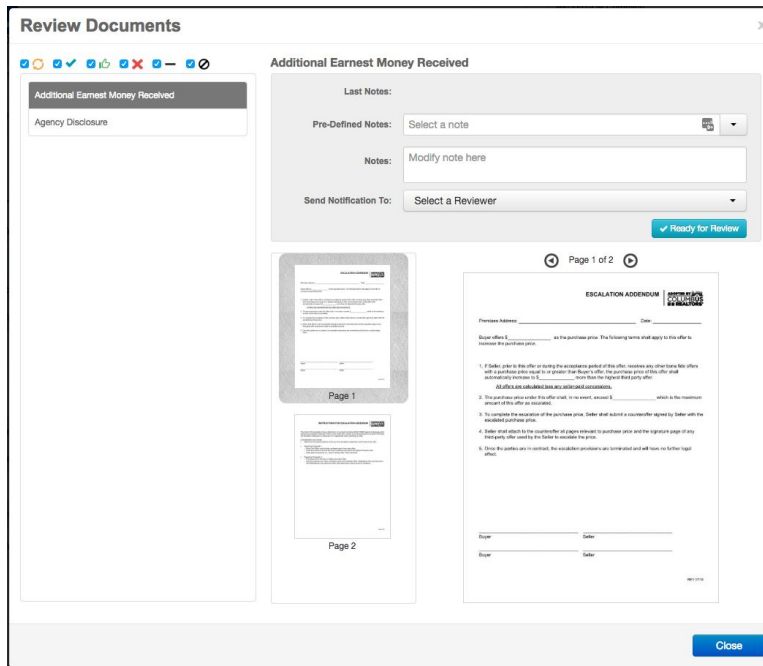
Review

rDocs includes a review module that lets Agents view system documents and then “promote” them to an admin or Broker to review and sign-off. A Broker can now lock-down a file so no revisions or updates can be made to reviewed documents.

If you’re reviewing multiple documents, you can select multiple documents and click “Review.” Clicking on “Review” opens an overlay screen displaying the document and a list of documents selected on the left column. If you’re reviewing only one document, you can click “Review Document” under Status Column.

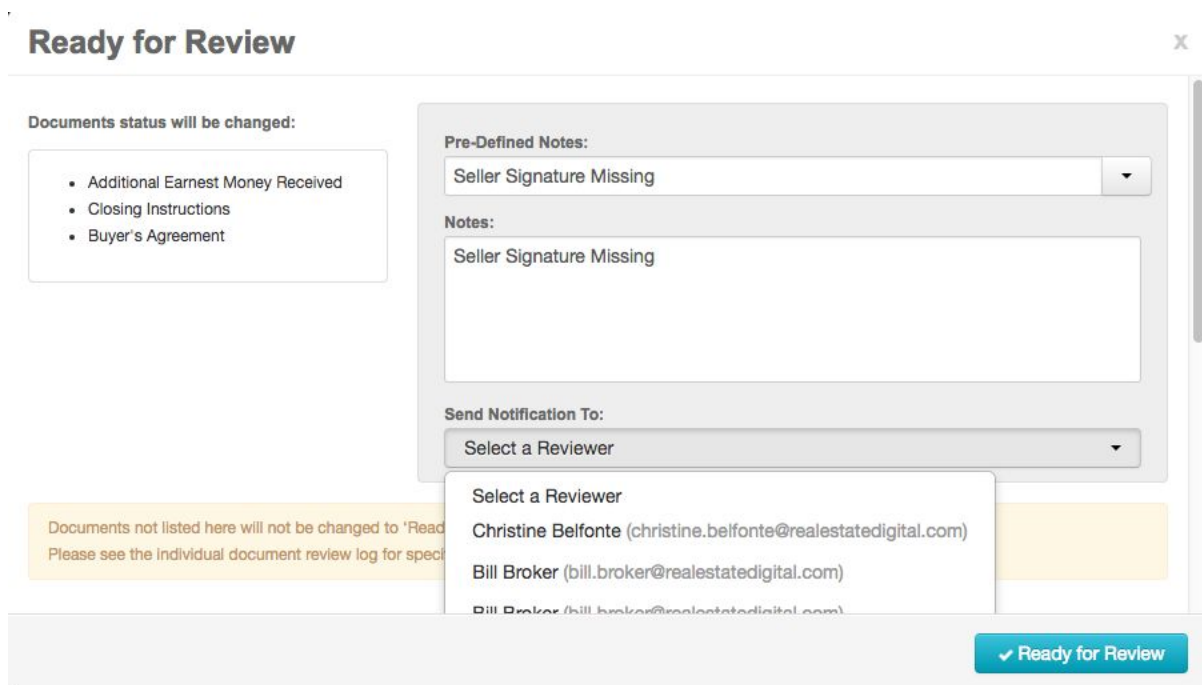
| Sort | Document Name | Received | Status | Note | Posted Date | Actions |
|-------------------------------|--------------------------|--------------------------|-------------------|------|--------------------------|---------|
| Agency Agreement (1/2) | | | | | | |
| <input type="checkbox"/> | Agency Disclosure | <input type="checkbox"/> | Review Document ✓ | | 2/6/2014 1:28 PM (PST) | |
| <input type="checkbox"/> | Buyer's Agreement | <input type="checkbox"/> | Ready for Review | | 2/4/2014 10:27 AM (PST) | |
| | Buyer's Agency Agreement | <input type="checkbox"/> | | | | |
| Home Inspection (1/4) | | | | | | |
| <input type="checkbox"/> | Home Inspection Report | <input type="checkbox"/> | Ready for Review | | 12/10/2014 8:08 AM (PST) | |

As an Agent, there is only one action or decision you can do on a document which is “Ready for Review”. Select the reviewer from the dropdown, and then click this button after reviewing the document to pass it on to the Admin or Broker for review.



Ready for Review

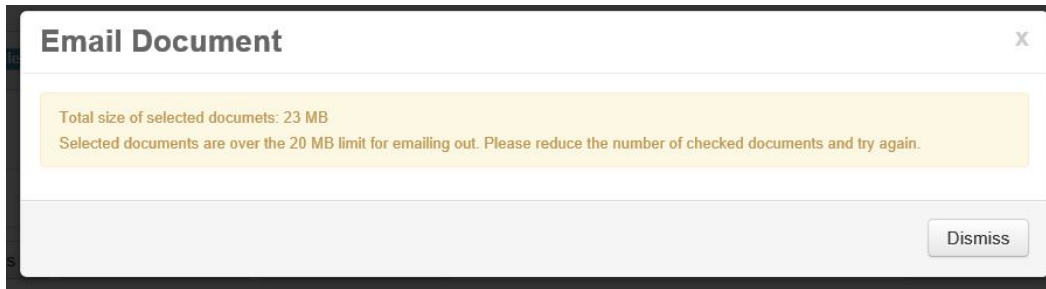
Ready for Review is the same as Review but offers a faster solution to review. If you do not need to verify the content within the documents, you can choose this option. This will quickly apply the status “Ready for Review” for the selected documents.



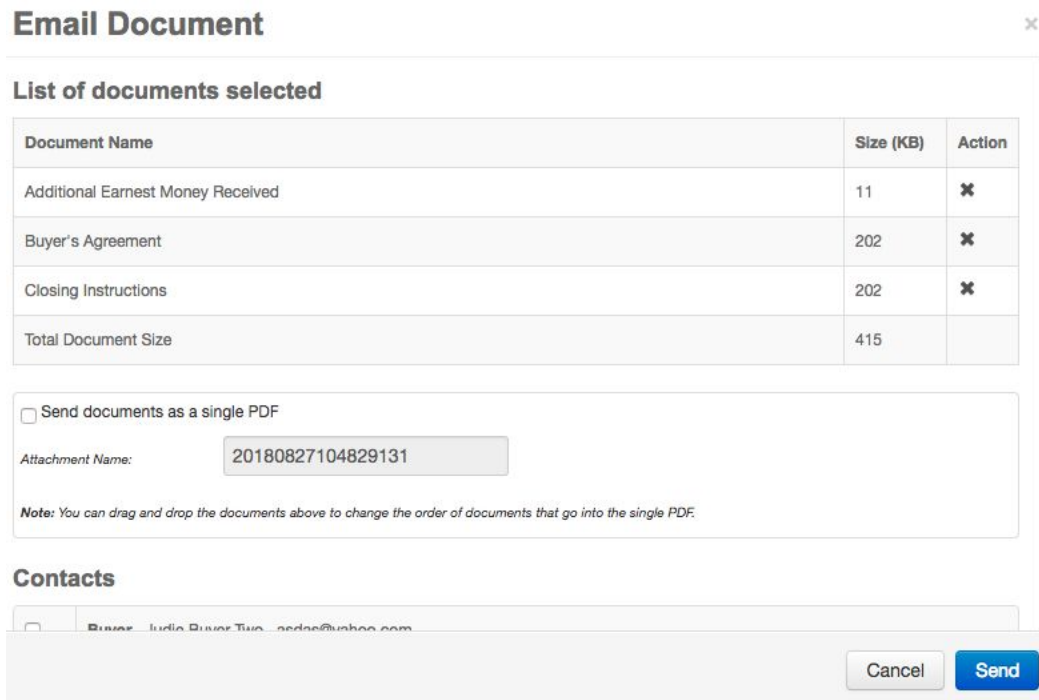
Email

If you are emailing documents, the combined size of all documents in an outgoing email from rDocs cannot exceed 25mb. If you’ve selected too many documents, the message displayed below will tell you

to select fewer documents. The documents page has a 'size' column to allow you to modify your selection easily.



You can change the order in which they appear by dragging and dropping the document name or remove the document by clicking "X." You can also choose to email the documents individually or combine them into a single PDF by marking the checkbox "Send documents as a single PDF."



Fax

rDocs offers a way for you to fax documents to a client. If you have created a contact with a fax number, you will be able to select them or manual enter one under Other Recipients. When using this option, it will take several minutes for the receiving party to receive the documents.

Fax Document [X]

List of documents selected

- Additional Earnest Money Received
- Buyer's Agreement
- Closing Instructions

Contacts

- Buyer, Judie Buyer Two, 656-696-9999
- Buyer, Lee Buyer One, 666-666-6666

Other Recipients

| Recipient's Name | Fax Number (xxx-xxx-xxxx) |
|----------------------|---------------------------|
| <input type="text"/> | <input type="text"/> |

Cancel Send

Move/Copy

If you accidentally uploaded the wrong documents to the wrong tile, you have the option to move it by selecting a transaction and clicking "Move." If you want to duplicate some documents to another tile, you would need to select a transaction and click "Copy." You are given the option to rename the copy/move documents before having it transferred/copied to the transaction.

Move/Copy Document [X]

List of documents selected

- Optionally, Specify a new name for each document, from the drop down, or enter the desired name.
- Specify a destination to move or copy the document(s).
- Press the Move button to move the document(s), press the Copy button to copy the document(s), or press Cancel to cancel the action

| Document Name | Rename To | Document Description |
|----------------------|--|-----------------------------------|
| Buyer's Agreement | -Select Document Title- Buyer's Agreement | A buyer's broker agreement creat |
| Closing Instructions | -Select Document Title- Closing Instructions | A summary of all information requ |

Select a transaction ✓ -Select Transaction-
 3055834 (8 Vista Del Valle, Aliso Viejo, CA-92656)
 3003630 (88 Via Athena, Aliso Viejo, CA-92656)
 3000653 (26491 Merienda, Laguna Hills, CA-92656)
 2927744 (5 Paine Cir, Irvine, CA-92614)

Cancel Move Copy

Print

When you select a document(s) to print, using the Work with Documents dropdown, rDocs will merge the PDF and the print console will display. The sequence of forms in the package can be modified: just click on a document name and drag and drop it to the desired location.

Note* If you have selected more than 10 forms for print, the forms will be sent to the Queue

Print Documents

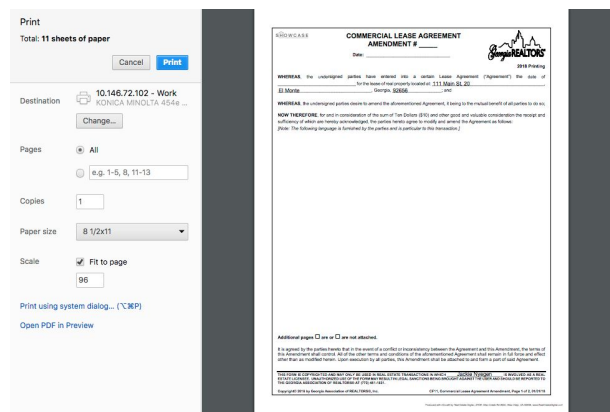


The following documents will be merged into a single printable document. To change the order of the documents in the printed version, please drag and drop the document names until you have the desired sequence.

| Document Name |
|-----------------------------------|
| Additional Earnest Money Received |
| Buyer's Agreement |
| Closing Instructions |

Cancel Print

After clicking Print, the print console from your computer will display.



Download

When you select a document(s) to download, using the Work with Documents dropdown, rDocs will prepare a package of those forms and you'll be asked to name that package. The system will be available as the package is being created, which can take several minutes. The sequence of forms in the package can be modified: just click on a form name and drag and drop it to the desired location.

Note* If you have selected more than 10 documents for print, the documents will be sent to the Queue

Download Documents



PDF Name

*Please enter the name of the merged PDF in the box above.

The following documents will be merged into a single downloadable PDF. To change the order of the documents in the merged version, please drag and drop the document names until you have the desired sequence.

| Document Name |
|-----------------------------------|
| Additional Earnest Money Received |
| Buyer's Agreement |
| Closing Instructions |

Cancel Download

After clicking Download, the documents will be merge together and will be downloaded to your browser.

Documents Queue

If you have selected more than 10 documents for Download or Print, the merge PDF will be sent to the Queue. You will be asked to name the package. The package will be available in several minutes as it is being created. The sequence of forms in the package can be modified: just click on a form name and drag and drop it to the desired location.

Send to Queue ×

You have selected more than 10 forms to merge and save as PDF. These forms must be merged into a single PDF and will be available for download within a few minutes.

*Please enter the name of the merged PDF in the textbox above.

The following forms will be merged into a single printable document. To change the order of the forms in the printed version, please drag and drop the forms names until you have the desired sequence.

| Form Name | |
|---|---|
| 2018 Table of Contents 01.01.18 | × |
| * B1 - Protect Yourself When Selling a House | × |
| CF11 - Commercial Lease Agreement Amendment | × |
| CF12 - Commercial Sublease Agreement | × |
| CF13 - Commercial Sublease Consent Agreement | × |
| CF14 - Commercial Lease Guaranty | × |
| CO11 - Referral Authorization | × |
| CO12 - Agree Between New Broker & Former Broker | × |

After clicking “Send to Queue” you will have the option to go see the Queue or continue where you left off.

Send to Queue ×

Your merge and download job has been created and queued for processing. You can also check the status by going to "Download Queue" in the menu conveniently located at the top of the page.

If you click “To the Queue”, you will be sent to the Documents Queue. If the package is complete, there will be a download link. If it’s still in progress, the system will indicate that and the download link will not appear. A completed package will consist of all of the forms in the package, as a single PDF.

Download Queue

Forms Queue Documents Queue

Delete

| <input type="checkbox"/> | Name | Created On | Completed On | Status | Comments |
|--------------------------|-------|--------------------------|--------------------------|-----------|----------|
| <input type="checkbox"/> | sdfsd | 8/27/2018 5:19 PM (EDT) | 8/27/2018 5:19 PM (EDT) | Completed | Download |
| <input type="checkbox"/> | test | 8/27/2018 12:30 PM (EDT) | 8/27/2018 12:30 PM (EDT) | Completed | Download |

Remove

To delete documents, you will need to select a document(s) and choose Work With Documents -> Remove. An overlay will appear to confirm whether or not you want to remove the selected documents.

Documents (3)

Work with Documents Add Document(s) Add a Checklist --

| Name | Size | Status | Note | Posted Date | Actions |
|------------------------|--------|-------------------|------|-------------------------|---------|
| Buyer's Agreement | 202 KB | Review Document ✓ | | 8/27/2018 1:46 PM (EDT) | |
| Instructions | 202 KB | Review Document ✓ | | 8/27/2018 1:46 PM (EDT) | |
| Earnest Money Received | 11 KB | Review Document ✓ | | 7/31/2018 1:34 PM (EDT) | |

Remove

Remove Document

List of documents selected

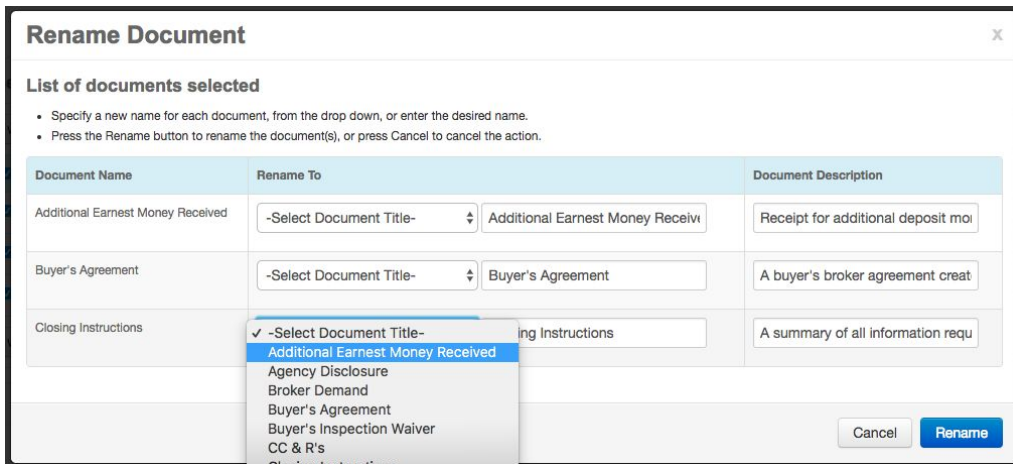
Buyer's Agreement

Are you sure want to remove these documents?

Cancel Remove

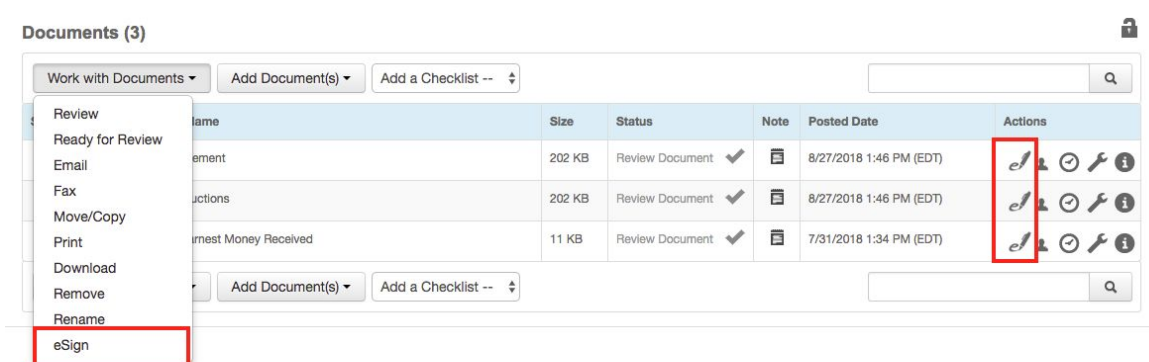
Rename

To rename a document(s), select one or more documents and choose the Work With Documents -> Rename. An overlay will open up and will let you rename the selected documents. You have an option to choose from a master list or create your own.



eSign

To start an eSign session, use either the individual action button or select multiple documents and use the Work With Documents - eSign. This will open up a window with the steps needed to complete the eSign session.



Note: The total combined document sizes in a single eSign session cannot exceed 50MB, or 25MB for a single file. An error message will display if the size is exceeded.

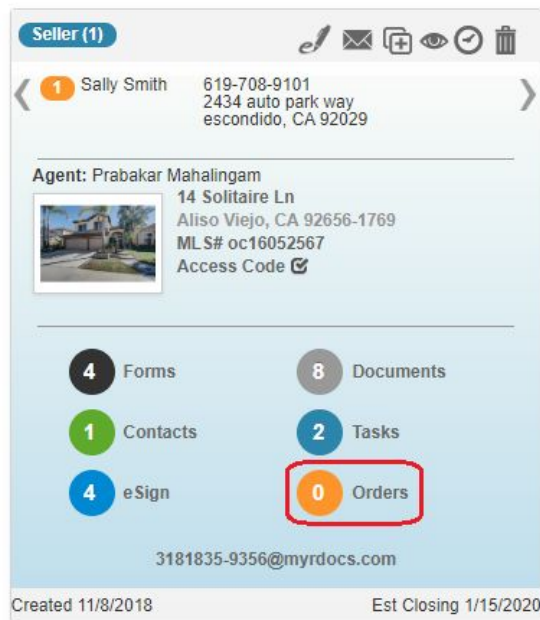
Before the eSign process begins, a page is displayed showing all of the contacts in the tile. You can select those who are to be signers in the session. You can add additional signers in Step 2. While all contacts will display, you can only select those with email addresses.



Placing Service Orders

NOTE: This feature may not be available on all sites.

From the tile, click on the 'Orders' link.




If there are Service Providers integrate with your site, you will see their logo with a 'Place Order' button under the logo. You can order from other providers by choosing the link in the 'Other Service Providers' box.


◀ Back to Dashboard

◀ Sally Smith Seller 619-708-9101 14 Solitaire Ln, Aliso Viejo, CA 92656-1769 ✎ ▶

Contacts (1) Forms (4) eSign (4) Documents (8) **Orders (0)**

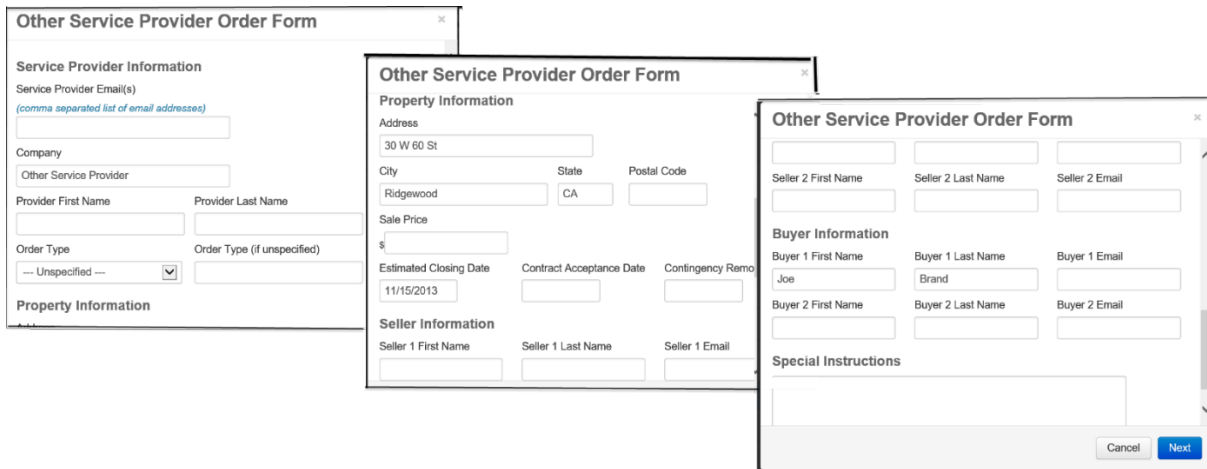
Service Providers





Other Service Providers

The example that will be used here is for Other Service Providers. Click on 'Place Order' to open the Order Form.



The screenshots show the following sections of the form:

- Service Provider Information:** Service Provider Email(s), Company, Other Service Provider, Provider First Name, Provider Last Name, Order Type, Order Type (if unspecified).
- Property Information:** Address (30 W 60 St), City (Ridgewood), State (CA), Postal Code, Sale Price, Estimated Closing Date (11/15/2013), Contract Acceptance Date, Contingency Removal.
- Seller Information:** Seller 1 First Name, Seller 1 Last Name, Seller 1 Email.
- Buyer Information:** Seller 2 First Name, Seller 2 Last Name, Seller 2 Email, Buyer 1 First Name (Joe), Buyer 1 Last Name (Brand), Buyer 1 Email, Buyer 2 First Name, Buyer 2 Last Name, Buyer 2 Email.
- Special Instructions:** A text area for additional notes.

Buttons: Cancel, Next

Fill in the relevant information and click the 'Next' button. The completed form will be displayed. Click on the 'Send' button to place the order. An email is sent to the service provider, and includes the tile's email address and instructions:

We're paperless! Please cc: the following email address when sending documents to me:

3318-2529@stage.myrdocs.com

Orders that have been placed appear in a list below the Service Providers.

Order Details - 2 Orders

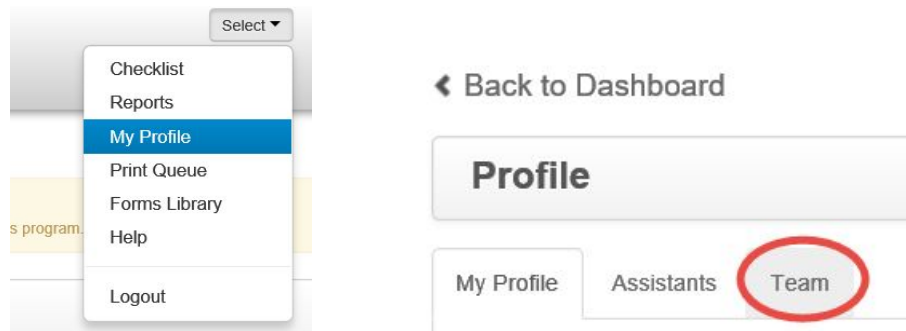
| Company | Name | Type of Order | Date Ordered | Action |
|------------------------|--------------|-----------------|-------------------------|--|
| Z Escrow | Joe Closer | Open escrow | 7/11/2016 7:52 AM (PDT) | i ✎ |
| Stewart Title Services | Irene Linger | Title Insurance | 7/11/2016 7:43 AM (PDT) | i ✎ |

Click on the 'i' to view the order, or the pencil to modify and resend the order.

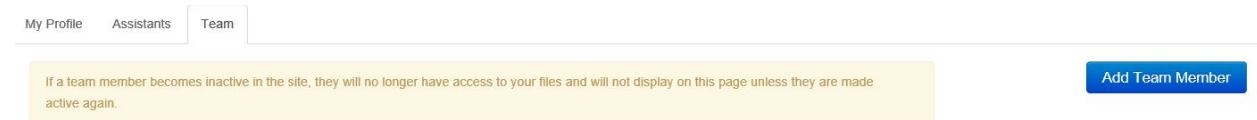
Teams

NOTE: This feature may not be available on all sites.

An agent or broker can add agents to their team so they can share tiles. To add a team member, click on the 'Profile' link on the top of the Dashboard and then select the 'Team' link.




Click on 'Add Team Member'.



Enter the team members name in the box (only a few characters are required) to display the available team members with that name. Select the desired name and click on the plus sign to add that agent to your team.

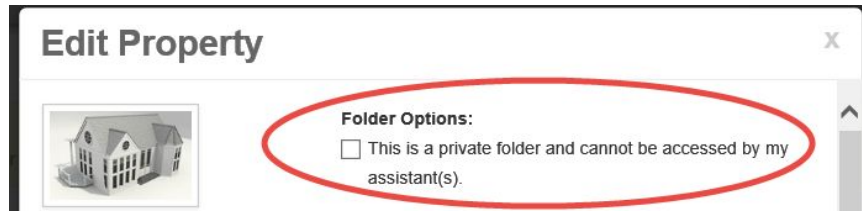
| First Name | Last Name | Email* | Action |
|---|-----------|--------|----------------------------------|
| <input type="text" value="ca"/> | | | <input type="button" value="x"/> |
| Admin, Carol (File Administrator) (RED) | | | <input type="button" value="+"/> |
| Broker, Carol (Broker) (RED) | | | <input type="button" value="x"/> |

Additional team members can be added as needed. When a team member is added or removed, a notification email will be sent to that agent.



| First Name | Last Name | Email* | Action |
|----------------------|-----------|-------------------------------------|---|
| Carol | Broker | carol.wissner@realestatedigital.com | <input type="button" value="x"/> |
| <input type="text"/> | | | <input type="button" value="+"/> <input type="button" value="x"/> |

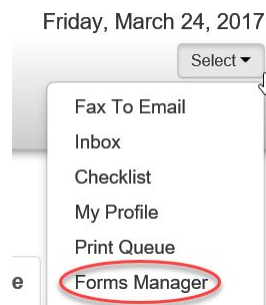
NOTE: You can tag a tile you've created as 'private' if you don't want it to be available to your team members. To do that, click on the property address in the tile and select the checkbox under 'Folder Options.'



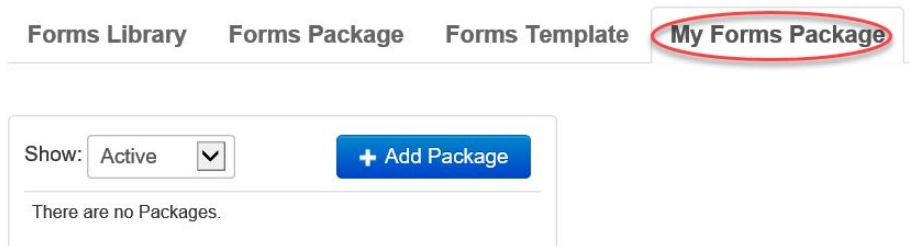
Agent Form Packages

Agents can create their own form packages, visible only to that agent.

To create a package, choose 'Form Manager' from the dropdown below the date.





Select the 'My Forms Package' tab, and then click on '+Add Package.'



Enter the name of the package and click Add.

To add forms, click on the appropriate link to add a new PDF that isn't in the system, or add a form from an existing library.

Show: Active

| Packages | |
|----------|---|
| My Forms |   |

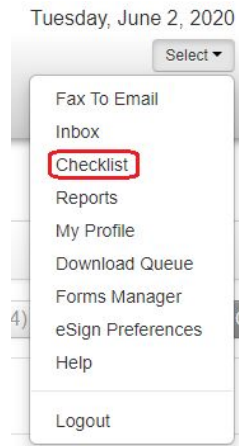
There are no Forms.

When selecting a Form Package to add to a tile, agent packages will be noted by (PP) next to the package name.

*Note: Forms uploaded from you will not have data auto-populate to the form. Only forms provided by rDocs will have auto-populate form.

Creating a Checklist













The dropdown at the top of the dashboard page contains an option called, "Checklist."



Choosing this will display the 'Checklist' creation screen. From here, you can create checklists, add tasks and delete checklists.

[← Back to Dashboard](#)

Checklist



| Sort | Checklist Name | Created Date | Actions |
|------|--|---------------------------|---|
| | Contracts  | 12/27/2013 10:33 AM (PST) |   |
| | Disclosures  | 12/23/2013 3:20 PM (PST) |   |
| | Dave's Checklist  | 1/17/2014 12:31 PM (PST) |   |
| | Closing Docs  | 1/24/2014 12:06 PM (PST) |   |

To add tasks to a check list you may either click on the "clipboard icon" on or click the "Add Task" button from Checklist tasks.

After creating the task you can associate documents to the task by clicking the “Associate Required Documents” button.

◀ Back to Dashboard

Checklist Tasks for: Contracts

| Sort | Task Name | Auto Complete | Actions |
|------|---|--------------------------|---|
| | Agency Agreement  Required Documents: Agency Disclosure, Buyers Agency Agreement Associate Required Documents | <input type="checkbox"/> |  |

Add Task Return to Checklist


When you “Associate Required Documents,” you can pick from a list of Master Document Names. Using the Master Document Names List will make it easier when you add documents. You can pick from the list or add a custom name. When you click “Save,” the name will be added to your Checklist. Associating documents to a task will create a placeholder for the document. When a document of the same name is added to a tile, it will fall under the specific checklist item it matches.

Agency Agreement

Master Document Names List

- Additional Earnest Money Received
- Agency Disclosure
- Broker Demand
- Buyer's Agreement
- Buyer's Inspection Waiver
- CC & R's
- Closing Instructions
- Counter Offer
- Deed of Trust
- Earnest Money Deposit
- Environmental Disclosure Report
- FIRPTA
- Flood Zone Certification
- HOA Documents
- Home Inspection Report
- Home Mortgage

Custom Document Names List

Buyers Agency Agreement 

Add Name

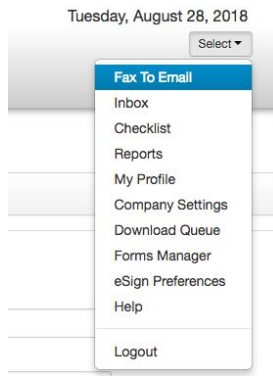
Cancel Save

Deleting a Checklist – click the “garbage” icon under the “Actions” column on the row where the checklist you want to delete belongs.

Fax To Email

This feature might/not be available for your site.

Fax to Email allows a user to fax a document(s) to rDocs and send a copy to the user. The faxed document will be located in the Inbox. To access Fax to Email, there is a dropdown next to your profile.



If you want to include additional recipient, click “Add More Recipients.” The recipients will get a copy of the fax documents. To complete the Fax to Email, you need to include: Document Name, Document Description(optional), Subject, and Message. If all the information is completed, click “Print” and a fax cover sheet will be generated. When the document is faxed into rDocs, it will be located at Inbox. To learn more about Inbox, please see Inbox.

Fax to Email

From

Sender's Name:*

Email Address:*

Fax Number: Phone Number:

To

Copy to my Inbox

| Recipient's Name | Email Address | Action |
|---|---|---|
| <input type="text" value="Thomas Lee"/> | <input type="text" value="jackie.ngo@realestatedigital.com"/> | |
| <input type="text"/> | <input type="text"/> | Add More Recipients |

Document

Document Name:

Document Description:

Message

Subject:

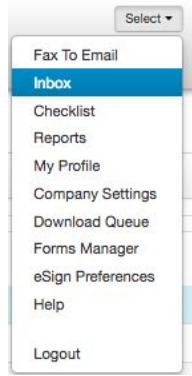
Message:

You have 500 characters left.

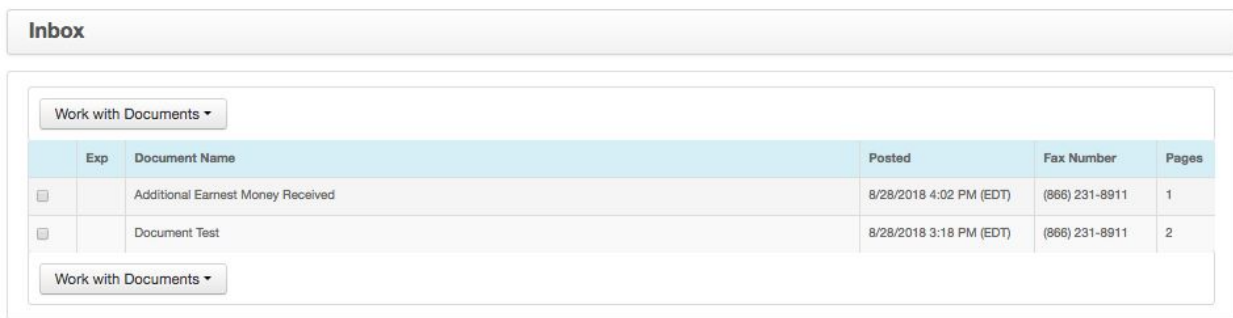
[Print](#)

Inbox

If the documents were uploaded via Fax To Email, the documents will be found here.

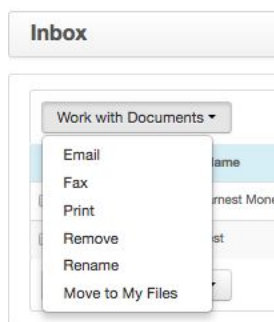


The Inbox displays a list of documents uploaded via Fax To Email. You will be able to Email, Fax, Print, Remove, Rename, and Move to My Files with the documents.



To move the document to a transaction, you will need to select a document and choose Work With Documents – Move to My Files. An overlay will popup allowing you to choose a transaction.

Note* When the document is moved, it will no longer be available in the Inbox.



Move Document

List of documents selected

- Optionally, Specify a new name for each document, from the drop down, or enter the desired name.
- Specify a destination to move the document(s).
- Press the Move button to move the document(s), or press Cancel to cancel the action

| Document Name | Rename To | Document Description |
|-----------------------------------|--|----------------------|
| Additional Earnest Money Received | -Select Document Title- Additional Earnest Money Receiv | |

Move document(s) to file

- Select Transaction-
- 3097108 -- no property info --
- 3097106 -- no property info --
- 3038842 -- no property info --
- 2904536 (10 Sunswept Mesa,Aliso Viejo,GA-92656)
- 2904499 (10 Sunswept Mesa,Aliso Viejo,CA-92656)

Cancel Move to File

Reports

Depending on your site, this feature might/not be available. If it is available, you will be able to generate report that is available for you. To access Report, there is a dropdown next to your Profile.

Select ▾

- Fax To Email
- Inbox
- Checklist
- Reports**
- My Profile
- Company Settings
- Download Queue
- Forms Manager
- eSign Preferences
- Help
- Logout

In the Report, you would see the following report(s) that are available for you. To access, you would need to click on the Report Name Link.

Reports

The following reports are available for you:

- Public Document Access Report

eSign Process

Step 1: Signing Session Configuration.

You must give the session a title. This will help you identify it later when looking at the signing history for that tile. Enter a personal message for your client if you wish. Select the signer sequencing and other options as needed. Note: Check the box 'Include me as a signer' if you will be a signer on the forms/documents. This will add your name in the next step. Use the blue 'Next' button to go to the next step.

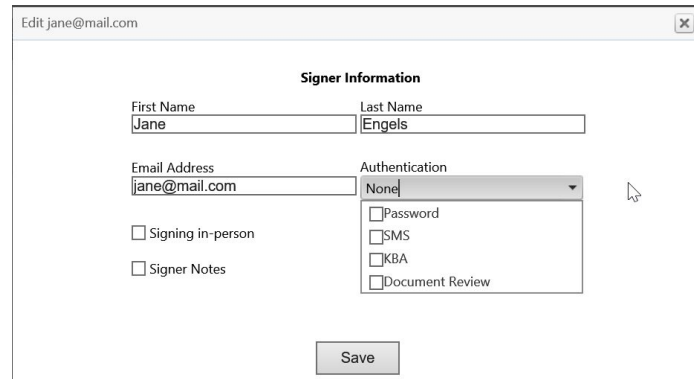
Step 2: Invite Signers.

| Seq. | First Name | Last Name | Email Address | Authentication | Actions |
|------|------------|-----------|-----------------------|----------------|---------|
| 1 | Phil | Inspector | phil@phi.com | None | |
| 2 | Marcus | Thorpe | marcus@wellsfargo.com | None | |

On this step you will see your list of signers. Here you can add signers to the list, change the order of the signers on the document, and delete any names in the list. NOTE: Additional signers added in this step within eSign will not be added as contacts in the tile.

Clicking on the Action icon will allow you to update the signer's name and email address as well as provide additional options such as signer authentication method, select if signer will be signing in person on your device, add a personal note, disable edit name and enable document review.

Signer Authentication methods: SMS authentication sends signer(s) a one-time unique password code via text message. Standard text message rates apply.



The screenshot shows a web browser window titled "Edit jane@mail.com". The main content area is titled "Signer Information". It contains several input fields and checkboxes. The "First Name" field is filled with "Jane" and the "Last Name" field is filled with "Engels". The "Email Address" field is filled with "jane@mail.com". The "Authentication" field is a dropdown menu currently set to "None", with a list of options below it: "Password", "SMS", "KBA", and "Document Review". There are also checkboxes for "Signing in-person", "Signer Notes", "Password", "SMS", "KBA", and "Document Review". A "Save" button is located at the bottom center of the form.

Knowledge based authentication (KBA) is an identity validation method to authenticate a signer by asking random questions selected from public and commercial information related exclusively to the signer. KBA is a requirement by major banks and lenders to accept e-signed documents for short-sale and REO transactions. There is a \$1.00 per signer fee for using KBA. You will be prompted for billing information before starting this signing session. If placing an offer directly to a bank or lender, it is suggested that you understand their electronic signature requirements before proceeding. Knowledge based authentication is only available for U.S. based residents.

Selecting Document Review will require the signer(s) to scroll thru the document(s) at the beginning of the signing session before they can actually begin the signing process.

Note: To get a brief explanation of the step when working in eSign, hover over the **question mark icon (?)** at the right side of the screen.

When you click Next on this step, you will be asked to define the signer roles of each of the signers so that rDocs can automatically tag the document with signatures, initials, dates, etc. on your forms. This is done via eSign Templates and all forms within your standard libraries will have this capability. Contact our Support team to learn how to create templates for your forms.

Using the pull down menus match the signer name to the signer roles for your transaction. Any Signer Roles that do not have a signer (e.g. Buyer 2 if there is only one buyer), can be left blank. The eSign program will automatically remove the signing tags associated to that role.

[Add Signer](#)

Assign Signer Roles

Buyer 1 :

Buyer 2 :

Buyer's Agent :

Cancel
[Next](#)

Step 3: Upload session documents. Here you will see the documents from your transaction that will be sent out for eSignature. You can see how many pages each document has, the number of signing locations, preview the document, and edit the document name if needed. The documents can be reordered from this screen also. You can also upload additional documents from your local device or cloud storage apps by clicking on the 'Add Files' icon. Make sure to add the signing locations for those documents in the next step.

1. Signing Session Configuration

2. Invite Signers

3. Upload Session Documents

4. Add Signing Locations

5. Preview Signing Session

6. Start Signing Session

Add Files
 Delete
 Prev
[Next](#)

| | Seq. | Document Name | Template | Pages | Size (KB) | Signing Locations | View | Edit |
|--------------------------|------|------------------|--------------|-------|-----------|-------------------|------|------|
| <input type="checkbox"/> | 1 | Buyer Agency.pdf | Buyer Agency | 1 | 106 | 4 | | |

Step 4: Add Signing Locations.

The screenshot displays the rDocs application interface during a signing session. At the top, a navigation bar contains six steps: 1. Signing Session Configuration, 2. Invite Signers, 3. Upload Session Documents, 4. Add Signing Locations (highlighted in blue), 5. Preview Signing Session, and 6. Start Signing Session. Below the navigation bar, a dropdown menu shows the current signer as 'Phil Inspector'. The main document area is titled 'BUYER AGENCY' and contains several paragraphs of text. The text includes a declaration of understanding of the agency relationship and a section for terms of the agreement. The document is annotated with yellow and green tags for 'Signature', 'Date: MT', and 'Date: PI'. On the right side, a 'Markups' toolbar is visible, featuring tools for adding text, strikethrough, underline, highlight, checkmark, and saving the markup progress. On the left side, an 'Actions' toolbar includes tools for signature, initials, date/time, form field, dropdown, and checkbox. A 'Radio Button' tool is also visible at the bottom left of the toolbar area.

While forms provided by your MLS, Association or Broker will be auto-tagged with signing locations, on this step you can drag and drop additional signing tags such as signatures, initials, dates, check boxes, etc. on other forms and documents that you have uploaded. Make sure to select the signer name from the pull down menu to the left before dragging and dropping signing tags onto your document. The tags can be clicked and drag to new locations as needed. Each tag will have a red **X** and a gear icon either when you mouse over or click on the tag. The tag can be deleted by clicking on the **X** and the properties of the tag can be changed by clicking on the gear.

Markup tools on the right side allow you to make additions or markup a form or document

Step 5: Preview Signing Session. This step allows you to look at each document in the signing session before sending them to the client(s). If you find that you need to add a signer or change the order of the documents, simply click on the “Previous” button to return to the previous step, or click on the numbered steps at the top of the page.

Step 6: Start Signing Session.

You may add a personal note to your signer(s). Please note: Instructional text on how to proceed with the e-Signing Session will be appended to the bottom of your note.

← Prev Next →

B *I* U abc **X** **x** [List Bullets] [List Numbers] [Link] [Image] [Table] [Font Name] [Size] [A] [Color]

Dear John,
Please review and sign.
thanks,
Prabakar

Design HTML Preview

You can review and edit your personal message to clients on this step. Note: All e-mails sent from eSign to your client will have complete instructions for signing the document(s) electronically.

When finished, click on “Next” to start the signing. If you are the first signer in the sequence, you will be provided the opportunity to sign now. You can also select to sign later in the option provided.

Once the session has been started, you are provided a Signing Session Information page that summarizes all the session info, signers, documents and audit trail.

When you are satisfied, click on the X in the upper right hand corner to close the window.

eSign History

At any time, you can view the eSign history of your tile or transaction by selecting the eSign link within the tile.

This will show you the eSign activity summary for your transaction. To view the details of the signing, simply click the magnifying glass icon. You will also receive an e-mail telling you when the document has been signed and a link to download the document, even though the final documents are automatically in your transaction document page.

Seller (1)

1 Sally Smith 619-708-9101
2434 auto park way
escondido, CA 92029














Agent: Prabakar Mahalingam
14 Solitaire Ln
Aliso Viejo, CA 92656-1769
MLS# oc16052567
Access Code

4 Forms 8 Documents
1 Contacts 2 Tasks
5 eSign 0 Orders

3181835-9356@myrdocs.com


Created 11/8/2018 Est Closing 1/15/2020


eSign Session History
















| Session Title | Status | Date Added | Actions |
|--------------------------------|-------------|--------------------------|---|
| Agency and Purchase Contract 2 | In Progress | 11/8/2013 3:52 PM (EST) |     |
| Agency and Purchase Contract | Cancelled | 11/8/2013 3:34 PM (EST) |    |
| Test contract | Completed | 11/8/2013 7:11 PM (EST) |    |
| CLP Consumer Guide | Completed | 11/5/2013 11:39 AM (EST) |    |

[Return to Dashboard](#)

Forms that are eSigned are returned to the Documents page without changing the name. Since there may be documents with the same name on the Documents page, it can be confusing to the user to tell which is the signed form. Therefore, eSigned forms returned to the Documents page will display '(eSigned)' after the document name, as shown below.

Documents (3) 

Work with Documents ▾ Add Document(s) ▾ Add a Checklist -- ▾ 

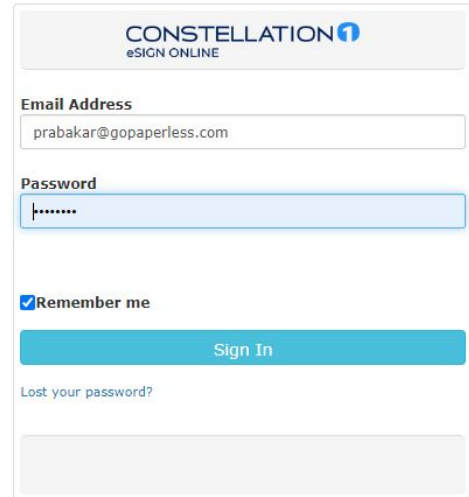
| Sort | Document Name | Status | Note | Posted Date | Actions |
|--------------------------|-----------------------------|-------------------|---|--------------------------|---|
| <input type="checkbox"/> | Counter Offer (eSigned) | Review Document ✓ |  | 6/27/2016 11:49 AM (PDT) |     |
| <input type="checkbox"/> | Agency Disclosure (eSigned) | Review Document ✓ |  | 6/27/2016 11:49 AM (PDT) |     |
| <input type="checkbox"/> | FIRPTA | Review Document ✓ |  | 1/21/2014 1:31 PM (PST) |     |

The system will still correctly match document names to the appropriate placeholder in rDocs checklists. If the document is emailed, the eSigned notation will not appear as part of the document name. It is only visible on the documents page for the user's convenience.

Browser Settings

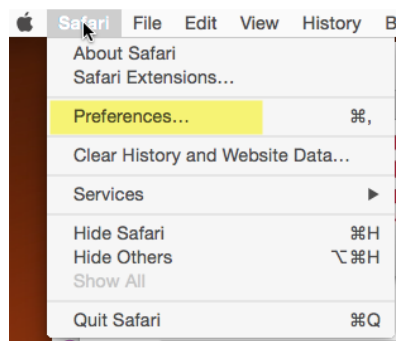
When doing eSign in Safari or iPad (Safari) browsers, be sure to turn on Accept “Cookies” in your browser settings before initiating an eSign session.

If you are using Safari and it requires you to login when doing eSign, See Steps 1--4 below to resolve this issue:



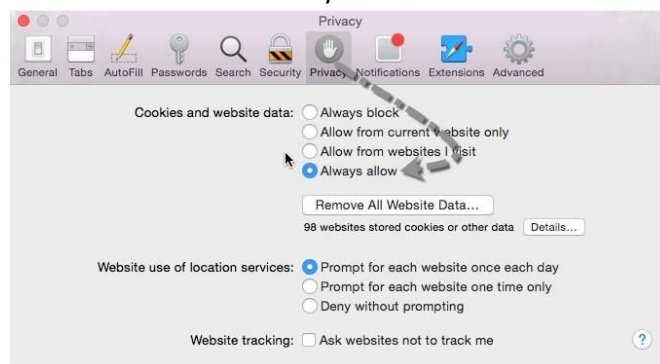
The screenshot shows the Constellation eSIGN ONLINE login interface. At the top, the logo reads "CONSTELLATION eSIGN ONLINE". Below the logo, there are two input fields: "Email Address" containing "prabakar@gopaperless.com" and "Password" with masked characters. A "Remember me" checkbox is checked. A blue "Sign In" button is positioned below the password field. At the bottom, there is a link for "Lost your password?" and a large, light gray rectangular area.

Step 1: Select Safari Preferences dropdown



Step 2: Select Privacy from top menu.

Step 3: Change Cookies and website data to “Always allow”



Step 4: Close preference window and click eSign icon again. Working with Documents

rDocs provides a module that facilitates online document management. If you have this functionality enabled for your account, the following features can be accessed.