

SCR TOTALBROKERAGE PROCESS DOCS – TRANSACTIONS ~ WORKING WITHIN A TRANSACTION

- v) **<u>Requesting Signatures</u>** This action will allow agents to select one or multiple documents for esignatures. You can request signatures from any contact in the peoples tab.
 - (1) You can request electronic signatures for a document on TotalBrokerage. To do this, go to the "Actions" menu at the top-right corner of the "Documents" tab. Then, click "Request Signatures".

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				+ Add Form		
谷 CRM 〈	General Documents People Property Financial Base Commission	Calenda	ar Email	Dipload PDF		
Marketing <	Name	Status	Last Updatec	Herge PDFs		
•షి Lead Routing <	SCR DA LLC INC 7302021	Editing	Feb 4, 2022 2:	Create PDF from ML		
몲 Intranet <		Culting	PM	Create Summary PD Request Signatures		
Transactions	F522 - Unilateral Notice to Terminate Purchase and Sale	Editing	Feb 4, 2022 2: PM	2: ↔ Share Documents		
D Forms Library	SCR DA One Agent 7302021.docx	Editing	Feb 4, 2022 2: PM			
Oview Transactions			Feb 4, 2022 2:	. E Create Quick Access Widget		
健 Reports <	F270 - Notice to Unilaterally Extend Closing Date For Eight Days	Editing	PM	ः के Submit to Utility Concierge		
ダ Human Resources く	F510 - Closing Attorney Acting as Holder of Earnest Money Exhibit		Feb 4, 2022 2:2 PM	20:43 Operations > 🕀		
🚱 Setup <	F511 - Agreement of Closing Attorney to Serve as Holder of Earnest Money ("Escrow Agreement")		g Feb 4, 2022 2:20:43 Operations ~		÷	
⑦ Help	(Buyer's Side)		PM			
	F255 - Instructions to Closing Attorney	Editing	Feb 4, 2022 2:2 PM	20:42 Operations ~	ঞ	

- (2) It will bring you to the follow page where you can select document you want to send out for signature.
 - (a) You can conveniently choose the Select All button to quickly choose all documents which a signer is on. You can drag the 4 way arrow on the right rearrange the order in which the documents are presented for e-signature.
- (3) In the next section, you can choose which signers you want to request from, and the method of signing (email, sms, or on this device). Each method of signing is different and the three methods are explained below.
 - (a) When sending Signature Request by Email, you have the option to choose which email to send the signature request to and the ability to add comments to the email for the signer.
 - (b) When sending Signature Request by SMS, you have the option to choose which phone number to send the signature request to and from.
 - (c) When sending Signature Request by Sign On This Device, it is in your best interest to have your customers manually sign the document (wet ink signature) instead of typing their

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Authored/Updated By:	Jason Hamby – IT Director	Release Date:	0101/2022
Approved By:	James Hamby – President & CEO	Page:	Page 11 of 23



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signature or initials so that there is no conflict. This option can be selected at the bottom of the page.

(d) You can add an additional signer for the same documents by pressing the green Add Signer button.

Send Signature Request

ients To Si	gn					
	Select Al	I	Docume	ent missing?		
	Selected	Document	Folder	View	Order	
		F201 - Purchase and Sale Agreement	No Folder Assigned	View	÷	
		F404 - Conventional Loan Contingency Exhibit	No Folder Assigned	View	e\$⊳	
		F510 - Closing Attorney Acting as Holder of Earnest Money Exhibit	No Folder Assigned	View	đ	
		F511 - Agreement of Closing Attorney to Serve as Holder of Earnest Money ("Escrow Agreement") (Buyer's Side)	No Folder Assigned	View	¢Ĵo	
		F255 - Instructions to Closing Attorney	No Folder Assigned	View	¢€o	
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Signer	Choose	2		•	Ľ	
	Send E	mail			-	

(4) After you click send, it will bring you to a status page where it will update you on when they have viewed/signed the requests.

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