



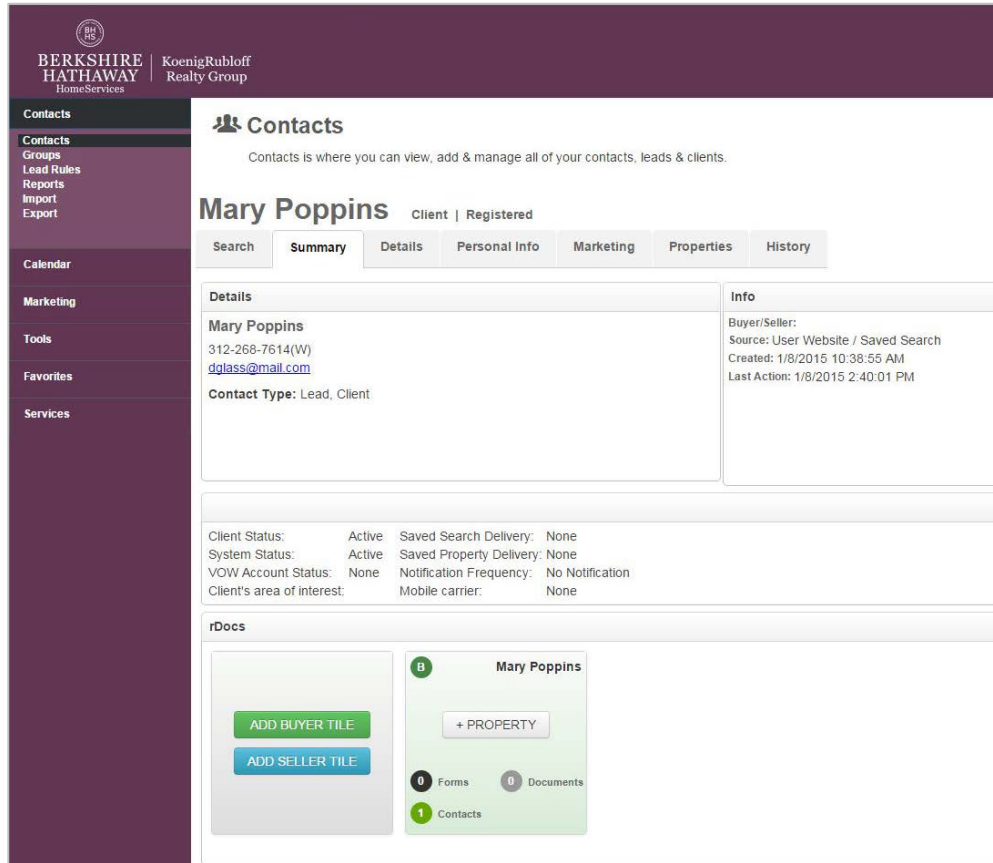
# DocuAgent Top Tips and Latest Features

*Making the Most of the KRG Transaction Management System*

DocuAgent is your full-service KRG transaction management system that allows you to complete forms electronically, sign forms electronically, and archive your transactions and all documents related to it. Make the most of your DocuAgent experience by learning about some top tips and latest features of the program.

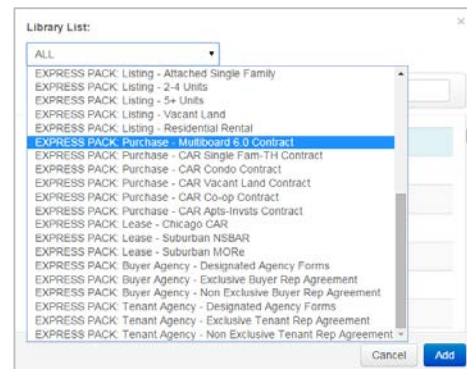
## Use rDesk to Organize Tiles by Client

You can always create new transaction tiles right from the DocuAgent dashboard, but another feature allows you to organize and archive tiles by client. To do so, create a contact record for your client in the rDesk CRM. Once added, scroll down in the contact record to the rDocs section to create a transaction tile. You can work the tile from the contact record or from the main DocuAgent dashboard. You can create, manage and archive multiple tiles for each contact.



## Use Express Packs to Simplify Form Selection

There are over 200 forms in the DocuAgent library. When adding forms to a transaction, the entire library is displayed with the forms arranged in alphabetical order. To simplify forms selection, click the dropdown arrow next to "ALL" to display the various subsets of forms. You will find a variety of EXPRESS PACKS that include the most commonly used forms for a transaction type. Select the express pack that applies to your situation, and scroll through the short list of forms to select and add the desired documents to your tile. Using DocuAgent express packs saves time and eliminates the chance of forgetting an important document.



## Use Datasheets to Save Time

The DocuAgent datasheet is the heart of the transaction tile. It houses important information about the subject property and all contacts related to the transaction, and pushes that information into other transaction forms as needed. By filling out the datasheet at the start of a transaction, you will save time by eliminating the need to type recurring property or contact information again and again.

Using a datasheet is easy: When adding forms to a tile, the first two choices in the forms list are the KRG Datasheets – one for seller/landlord and one for buyer/tenant. Select the form that applies to your transaction type and wait for the form to appear in your form editor. Begin entering the information called for on the form. (The gray areas cannot be altered in the datasheet; refer to the instructions on the datasheet to edit this information.) Any information not known at this time can be added to the datasheet later.

As you add other forms to the transaction, information from the datasheet will automatically flow to the forms as needed.

## Use the Left Menu When Working with Multiple Forms

The form editor has two action menus, one along the top right that is intended for use with single forms, and one along the left intended for use with multiple forms. When printing, deleting, emailing or esigning multiple forms, you must select the forms in the left checklist and **use the dropdown menu directly above the checklist** to select the desired action.

For use with multiple forms

For use with single form displayed in form window

## Use the Markup Feature to Strike/Add Text

The recent addition of the markup feature allows you to strike and/or add text to any form during an esign session. The markup feature menu appears on the right of the screen in *Step 4: Add Signing Locations*. Clicking ADD TEXT will generate a text box that you can drag, drop, resize, and type into to include additional text. Clicking STRIKE THRU will generate a red line that you can drag, drop and resize to strike text as desired. Before using the markup features, consult with your Managing Broker to ensure that your proposed changes comply with license law and company practices.

**eSign**

1. Signing Session Configuration
2. Invite Signers
3. Upload Session Documents
4. Add Signing Locations
5. Preview Signing Session
6. Start Signing Session

Signer: Betty Buyer | Signature | Initials | Date/Time | Form Field | Checkbox | Radio Button | Prev | Next | ?

Pages +

**MULTI-BOARD RESIDENTIAL REAL ESTATE CONTRACT 6.1**

1. **THE PARTIES:** Buyer and Seller are hereinafter referred to as the "Parties".
2. Buyer Name(s) *[please print]* Betty Buyer
3. Seller Name(s) *[please print]* Sam Seller
4. **If Dual Agency Applies, Complete Optional Paragraph 31.**
5. **THE REAL ESTATE:** Real Estate shall be defined as the property, all improvements, the fixtures and Personal
6. Property included therein. Seller agrees to convey to Buyer or to Buyer's designated grantee, the Real Estate
7. with approximate lot size or acreage of \_\_\_\_\_ commonly known as:

Markups: Add text, Strike-thru

## Use In-Person Signing in Face-to-Face Meetings

In situations where forms will be signed electronically and the signer is physically with you, use the in-person signing feature to allow the signer to sign on your device.

In *Step 2: Invite Signers*, click the pencil (edit) icon to the right of the signer's name. Check the box to enable **SIGNING IN-PERSON** When prompted to select an authentication method, choose **SMS TEXT**, after which you will be prompted to enter the signer's mobile number. Proceed through the esign preparation as usual.

**Signer Information**

First Name: Betty | Last Name: Buyer

Email Address: dianelglass@koenigrubloff.com | Authentication: SMS text

Signing in-person | Signer's 10-digit Phone Number: (312)-555-5555

SMS authentication

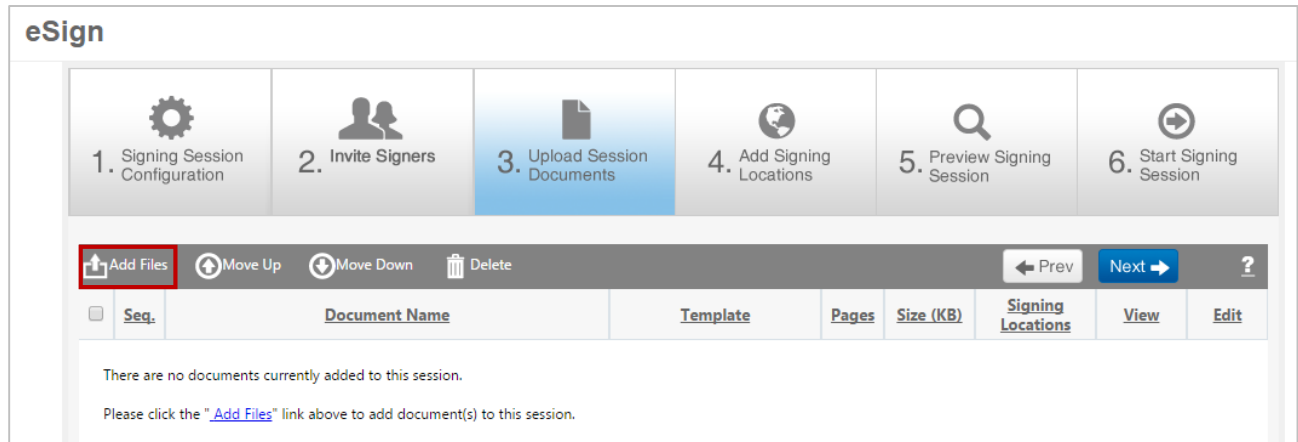
- SMS authentication sends signer(s) one-time unique password codes via text message. Standard text message rates apply.

Save

When it is time to invite the signer to the session, you will be prompted to enter the signer's mobile number once again, which will send the signer a one-time unique code via text message. After the signer enters the unique code on your screen, the signing session will open on your device.

## Use Quick eSign to Sign Documents Saved to Your Computer

Sometimes you will want to create an esign session with forms that are saved to your computer. To do so, click the eSign icon ("e" + pen) on the outside of the transaction tile, which will open a new esign session. In *Step 3: Upload Session Documents*, click ADD FILES and navigate to the documents saved on your computer. Proceed through the esign session as usual, being sure to add signing locations in step four.



## Use the Safari Browser Tweak to Bypass the RED Login Screen

Mac + Safari users may be presented with a RED login screen when attempting to begin an esign session. Do not attempt to login. A simple, one-time tweak to the Safari browser will eliminate this window and allow you to proceed to the session.



*For Safari on Macbook :*

- From Safari toolbar select PREFERENCES > PRIVACY
- Click PRIVACY and under "Block cookies and other website data" select NEVER
- Click SECURITY and turn off pop-up blocker

*For Safari on iPhone & iPad:*

- Go to iPad SETTINGS > SAFARI
- Under "Block Cookies" select NEVER
- Under "Block pop-ups" slide button to left to turn off (button turns white or gray)

The next time you begin an esign session, you will see this message: "This site is attempting to open a pop-up window." Click ALLOW. You will proceed to the esign session and will not encounter the RED window during future esign sessions.

## Stay Tuned for New DocuAgent Video Tutorials

We are working on a new library of DocuAgent videos that will be available within the next few weeks. Watch for shorter videos that focus on specific steps and features of the DocuAgent system.

### Practice First!

Ensure a smooth esign experience for your clients by practicing with the DocuAgent system before putting it to use in a real transaction. Set yourself up as a signer and send yourself some sample documents to sign. Having first-hand knowledge of the consumer experience will prepare you for answering client questions and navigating them through the esign session.