



How To Series: ViMO Digital Forms with e-signature capability

Electronic Forms in ViMO are easy to complete, and save you time and money.

Impress your clients by incorporating this environmentally friendly paperless solution into your workflow.

Teranet has a licensing agreement with the Ontario Real Estate Association (OREA) to provide Standard Forms and Clauses through our mobile solution, ViMO.

ViMO's "**Forms**" section includes forms that may be signed electronically only. The Agreement of Purchase and Sales is not approved for electronic signature and it is not included in the initial forms available.

We have initially provided the following popular forms for use in ViMO:

- ❖ Amendment to Buyer Representation Agreement (OREA Form 305)
- ❖ Amendment to Listing Agreement (OREA Form 240)
- ❖ Assignment of Buyer Representation Agreement (OREA Form 302)
- ❖ Buyer Customer Service Agreement (OREA Form 310)
- ❖ Buyer Representation Agreement (OREA Form 300)
- ❖ Cancellation of Buyer Representation Agreement (OREA Form 301)
- ❖ Cancellation of Listing Agreement (OREA Form 242)
- ❖ Corporation/Entity Identification Information Record (OREA Form 631)
- ❖ Individual Identification Information Record (OREA Form 630)
- ❖ Listing Agreement (OREA Form 200)
- ❖ Listing Agreement (Lease) (OREA Form 210)
- ❖ Mortgage Verification (OREA Form 261)
- ❖ Receipt of Funds Record (OREA Form 635)
- ❖ Risk Assessment (OREA Form 639)
- ❖ Schedule to Buyer Representation Agreement (OREA Form 303)
- ❖ Schedule to Listing Agreement (OREA Form 203)
- ❖ Seller Customer Service Agreement (OREA Form 201)
- ❖ Seller's Direction re: Property/Offers (OREA Form 244)
- ❖ Working with a REALTOR (OREA Form 810)

We will expand the list of forms available through ViMO over time and when regulations allow the Agreement of Purchase and Sale to be signed electronically.





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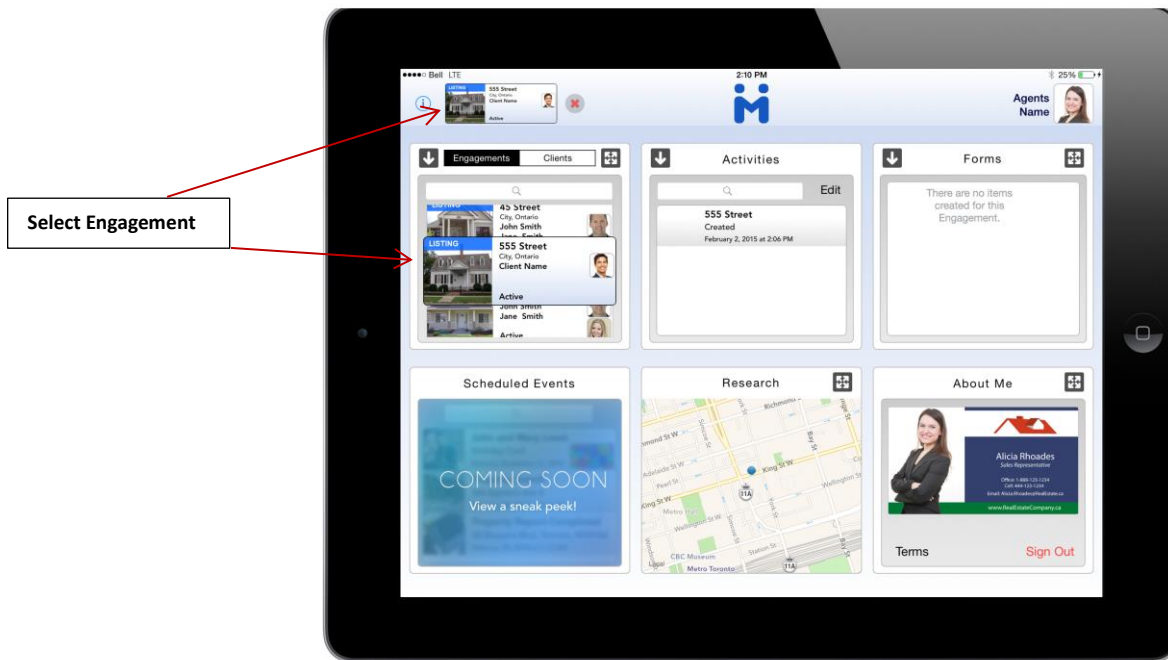
Section 1: Creating and Filling Forms

The **“Forms”** section is located on the top right of your dashboard.

In order to activate available **“Forms”**, you must follow these steps:


1. Select an **“Engagement”**.

Once you have selected an **“Engagement”**, by pressing on the **“Engagement”** card, you will notice that it appears on the top left corner of your ViMO header.



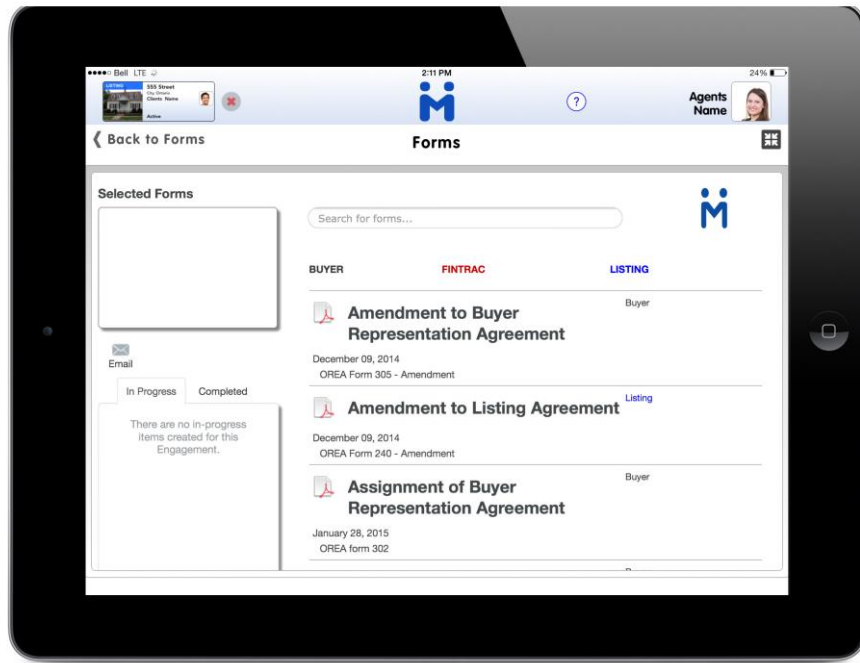
You will notice the **‘X’** to the right of the active **“Engagement”** which allows you to easily deselect it when done. Please note that deselecting an **“Engagement”** will reset the **“Forms”** screen.

2. Within a few seconds, the **“Forms”** section will list any active forms available for the given Engagement.

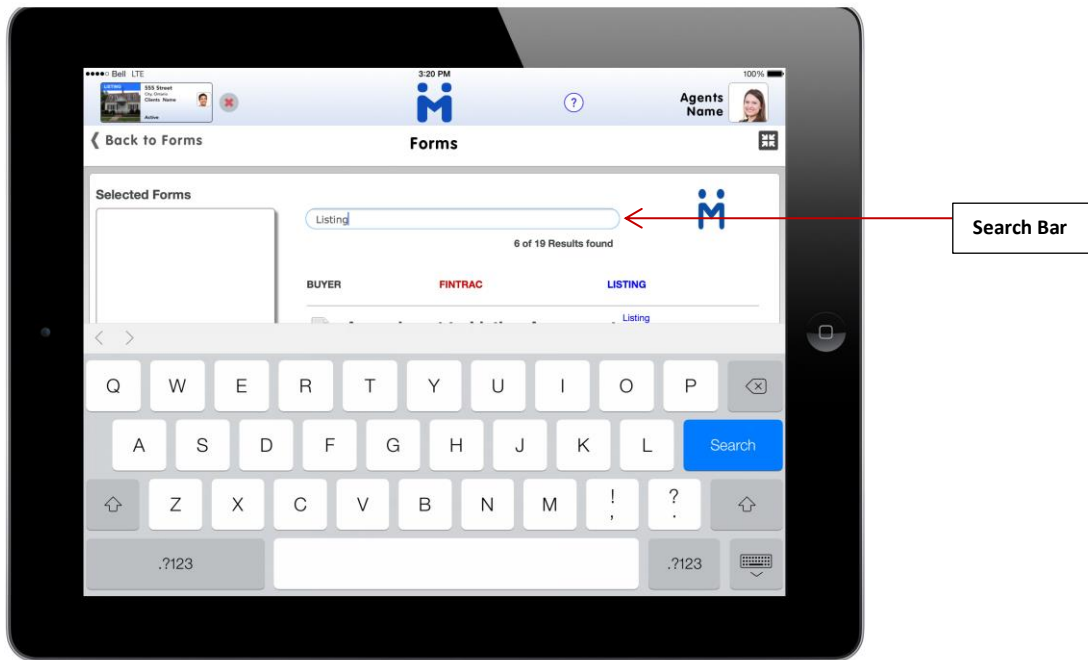
Expanding  the **“Forms”** section will reveal your forms’ library based on Standard Forms and Clauses provided by OREA. The forms available are for buyer and listing Engagements.

Forms will appear in alphabetical order within the main list.

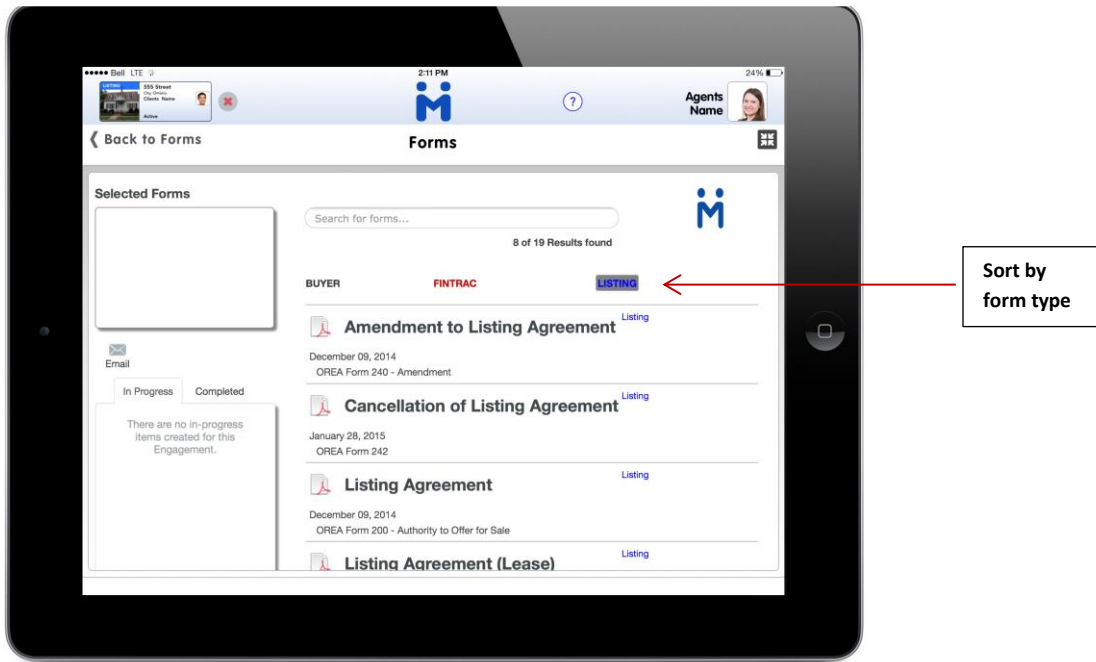




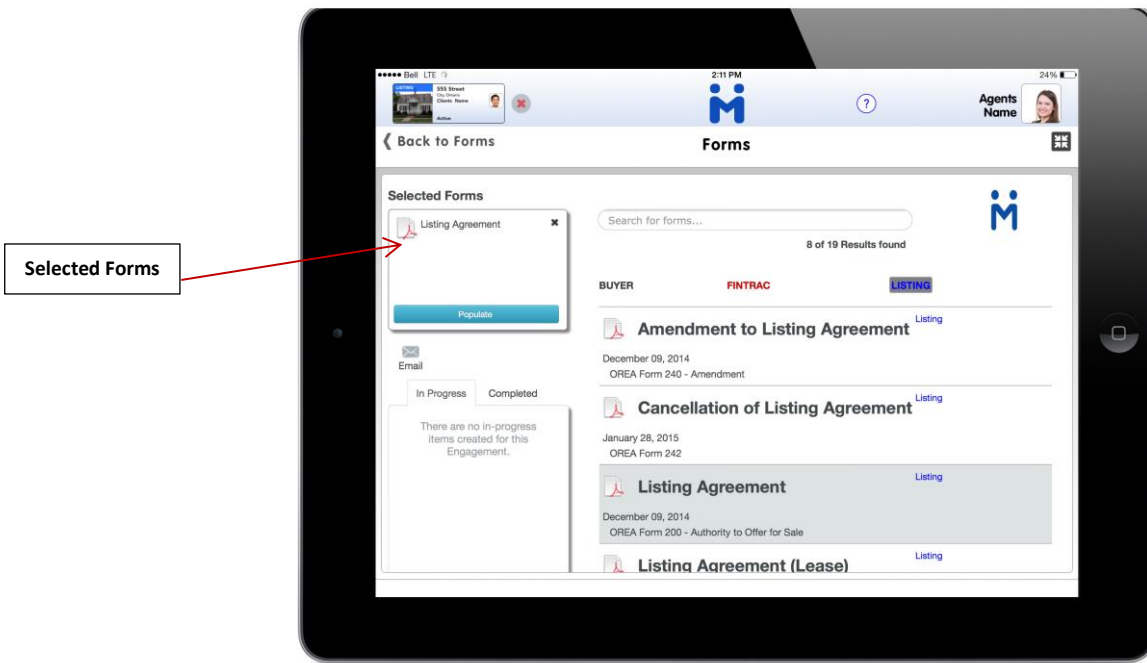
At the top you will notice a search bar where you can type in a keyword and the “Forms” list will reveal the available options.



- Forms can also be sorted by the form type BUYER, FINTRAC or LISTING. To sort by the form type, select type (i.e. LISTING) and only “LISTING” related forms will display.

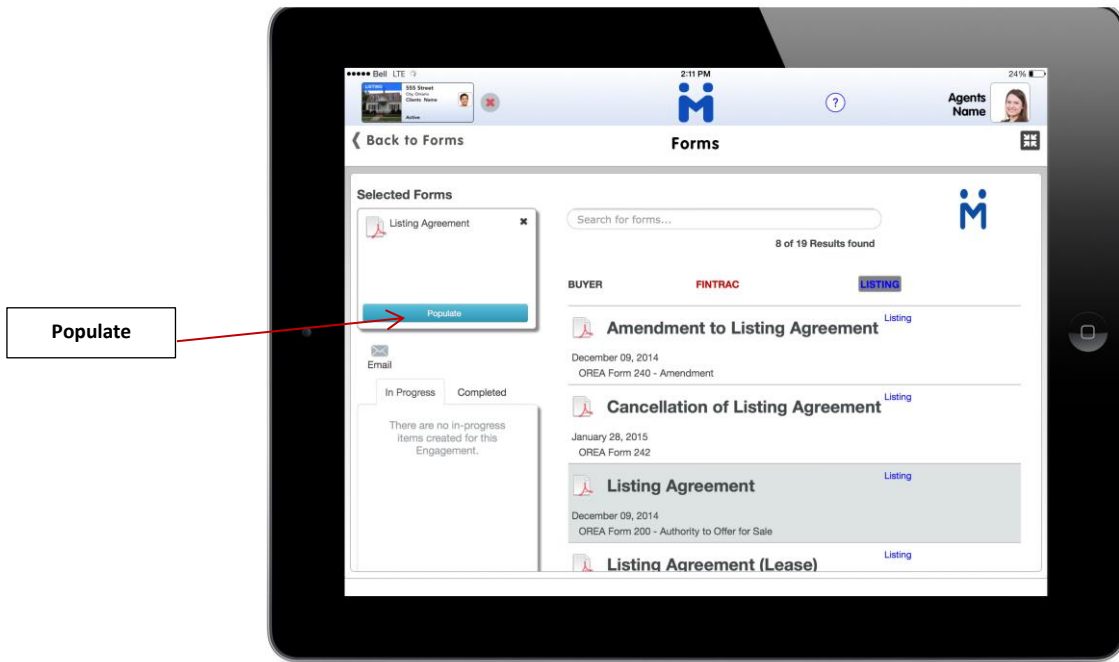


- Selecting Forms: You can choose one or more forms by selecting the form's title (s). As you select you will see the forms appear in the “Selected Forms” box in the top left.





5. Populating Forms: To open and populate a form, select the blue **“Populate”** button located at the bottom of the **“Selected Forms”** section.



The **Form** will auto populate with your profile information (taken from the **“About Me”** section), property listing’s information (taken from the **“Engagement”** section) as well as relevant fields from the Electronic Land Registry System. This will allow you to quickly complete the form to share with your clients and brokerage.

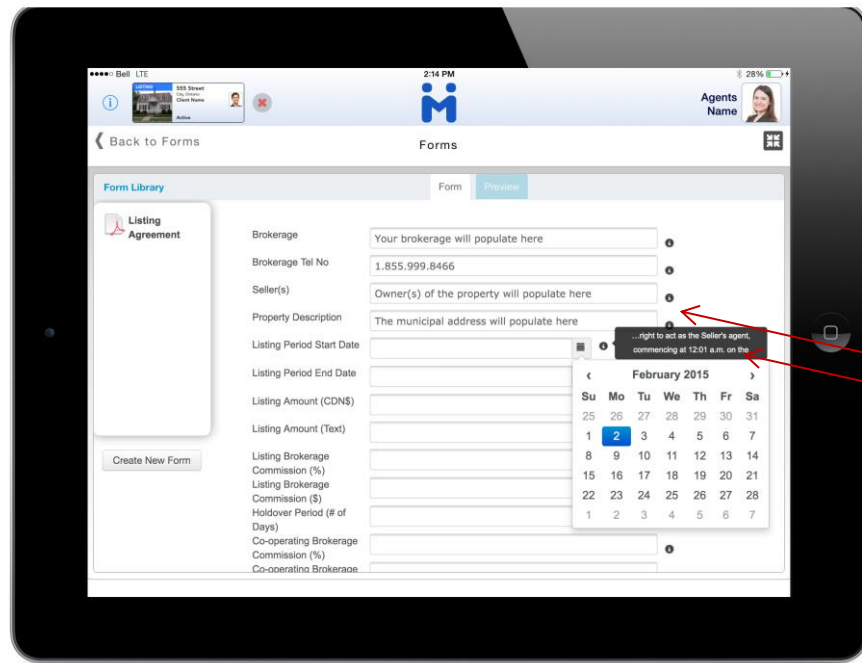
You can easily switch between your form types by choosing the desired form in Select Forms. To deselect any form choose the **‘X’** to the right of the form name.

6. To complete the form, simply select the input fields and enter the information.

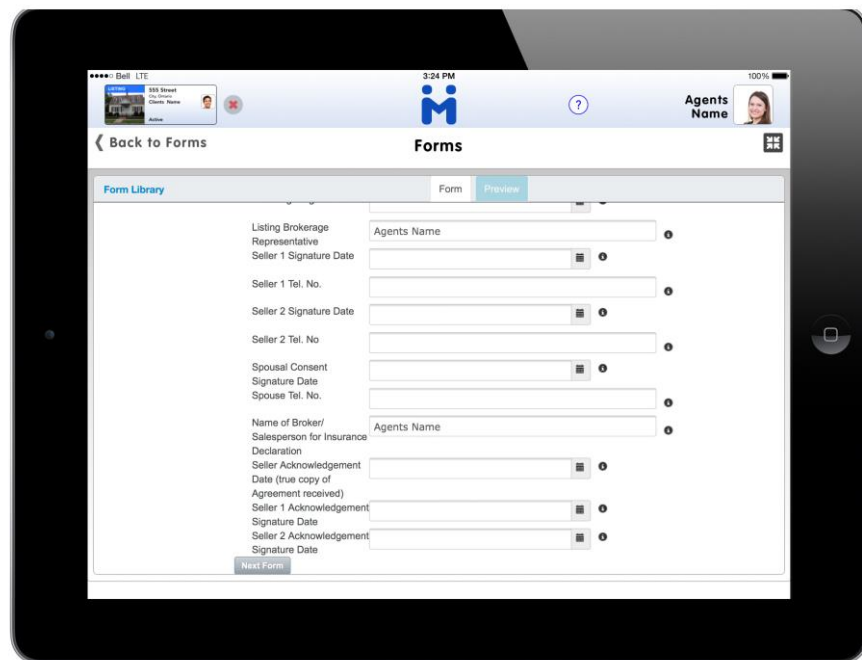




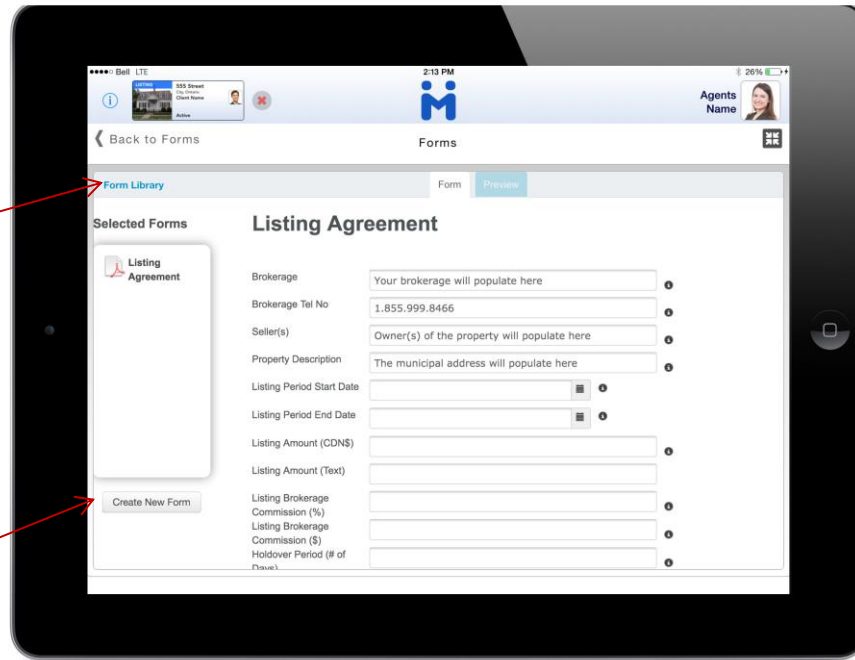
To the right of the input boxes you will find a calendar where a date is required and an 'i' that will open with additional tips on how to complete the field.



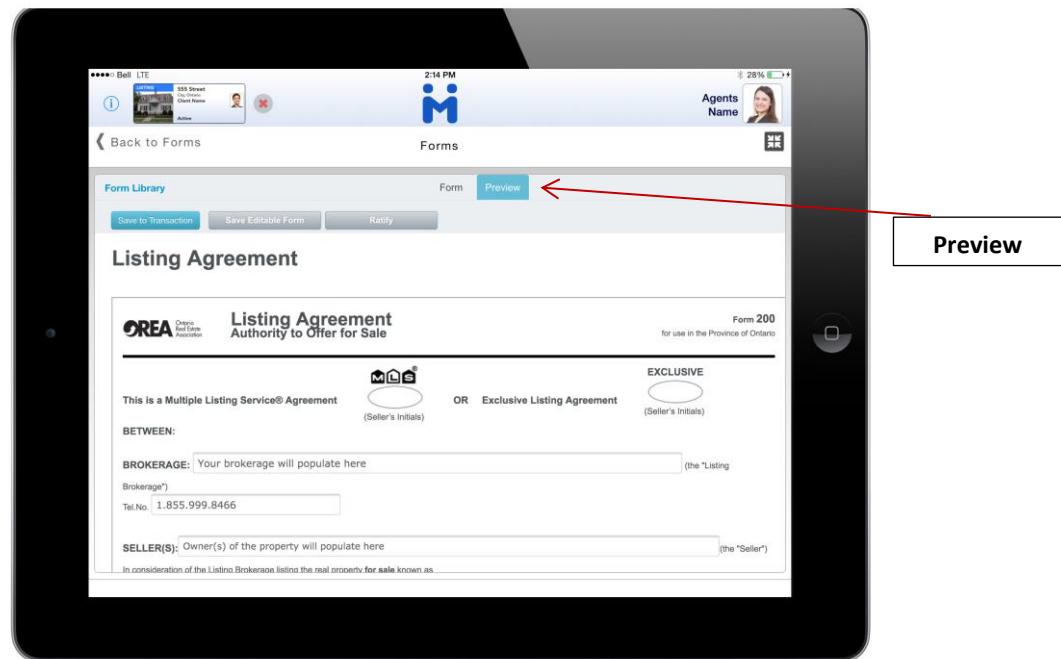
7. Once you reach the bottom, you can move on to **"Next Form"** or **"Previous Form"** or move up to the top tabs and select **"Preview"**.



- To return to the **“Forms Library”**, you can click on the **“Create New Form”** button located at the top of the page underneath **“Selected Forms”** or select the **“Form Library”** link on the left of the **“Forms”** header.

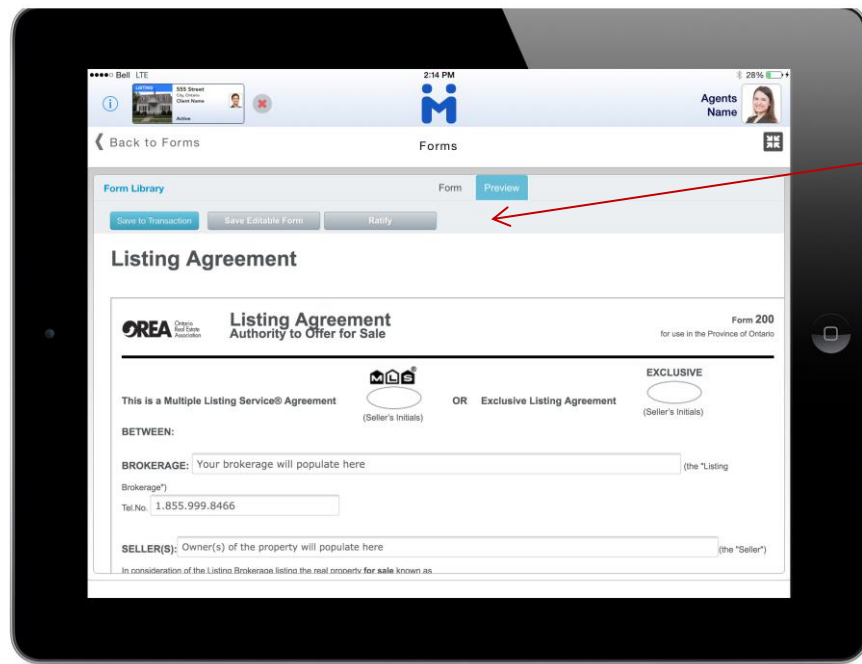
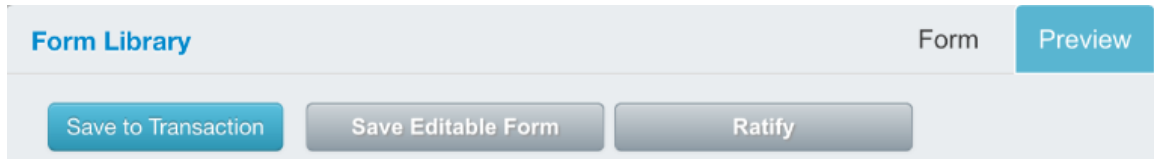


- The **“Preview”** tab will give you a real form view of the content & forms that you have created. From here you can review, edit, save and complete the form as needed.





10. Saving your forms: There are two options to save your form: **“Save to Transaction”** and **“Save Editable Form”**.



Larger Image

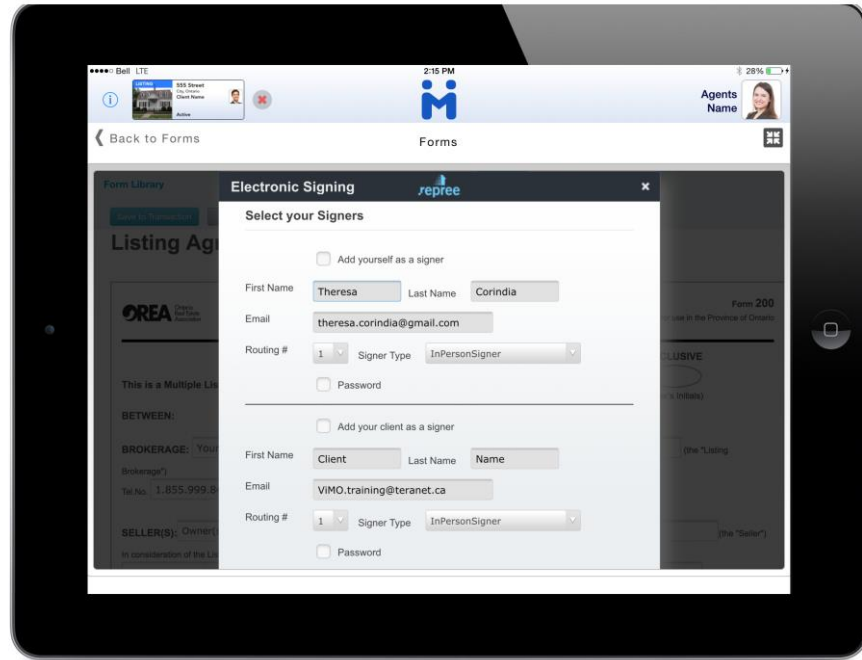
- ❖ **“Saving to Transaction”** saves your form in a completed non-editable version. This is generally used when your form is ready to go. A copy of the PDF is available in the **“Completed”** tab from the **“Forms”** menu.
- ❖ **“Save to Editable Form”**, allows you to save your form as a work in-progress to be opened and edited at a future time. The editable form can be accessed from the **“In Progress”** tab from the **“Forms”** menu.
- ❖ **“Ratify”** to sign the document.

*Tip: We suggest that you prepare your form before meeting with your client and select to **“Save to Editable Forms”**. This way you can easily access the form and edit as needed to sign with your client in person.*





10. Signing your form: “Ratify” opens up VIMO’s access to **repre**™*, an electronic signing system. Here you will see all the necessary options to complete the electronic signing of your form.




Forms created in ViMO are managed by a third party company, **repre™. An account for **repre**™ is automatically created with your ViMO account and no action is required.*

*For more information about **repre**™ please visit their website at www.repre.com.*

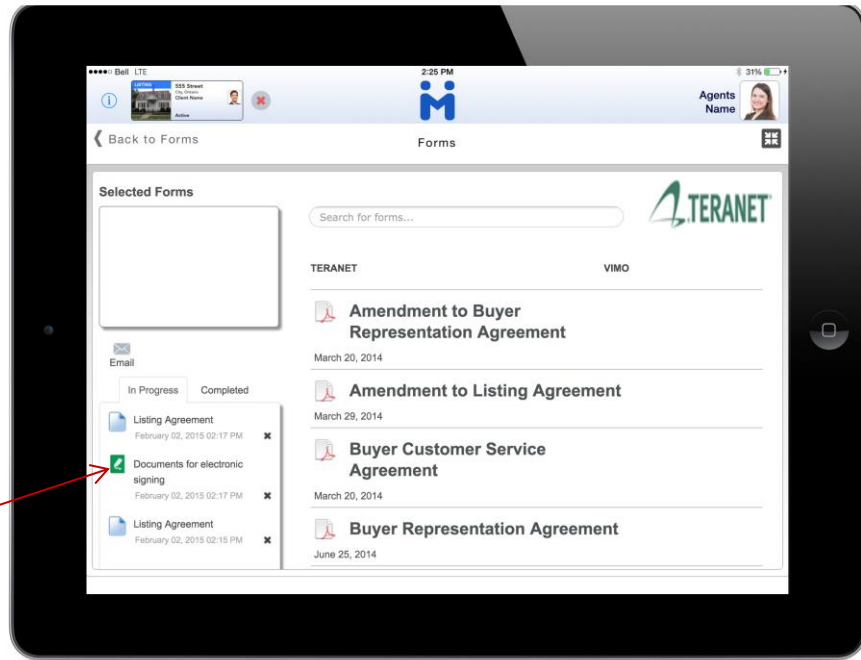




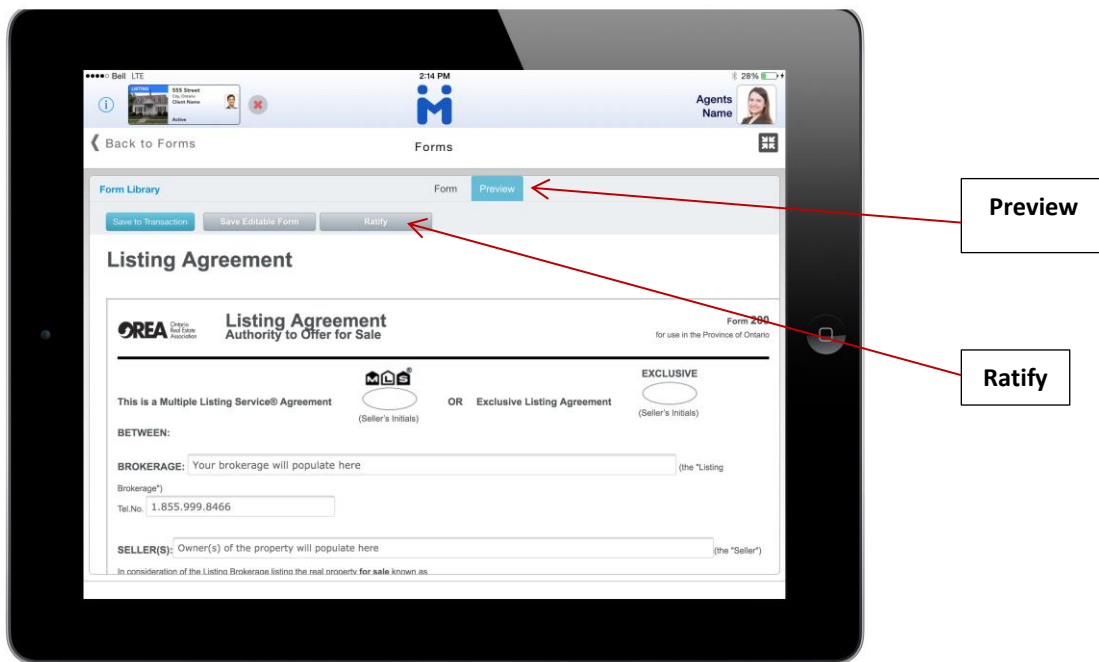
Section 2: Sign the Form in Person with your client:

1. Expand  the **“Forms”** section, select the **“In Progress”** tab and then **“Editable Forms”**

In Progress
and Editable
Forms

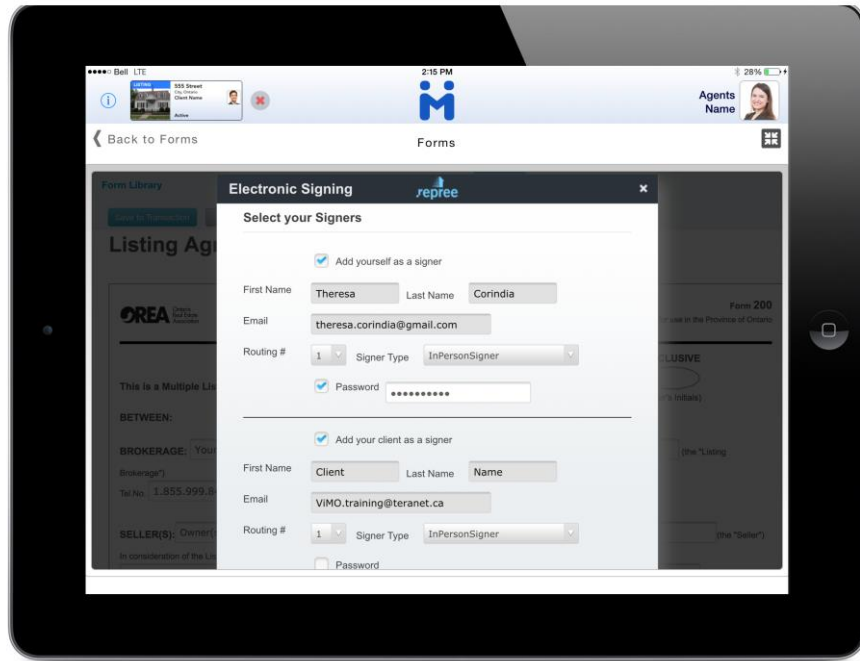


2. The window will open in the **Form** view, select **“Preview”** followed by **“Ratify”**

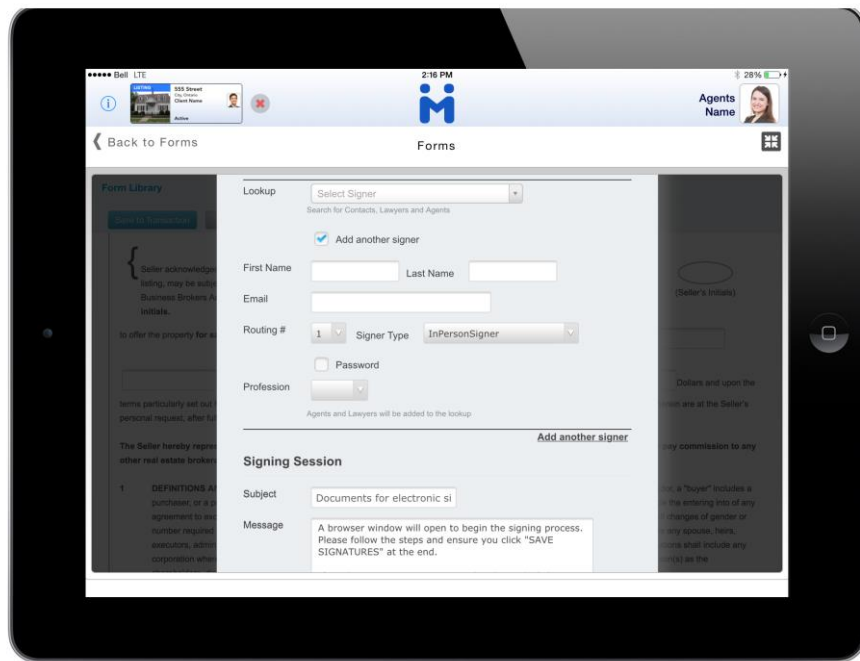




3. The repree™ electronic signing window will open



- a. Select “Add yourself as a signer”: Your First Name, Last Name and Email address will populate from your profile
- b. Select “Add your client as a signer”: Your Clients First Name, Last Name and Email address will populate from their profile





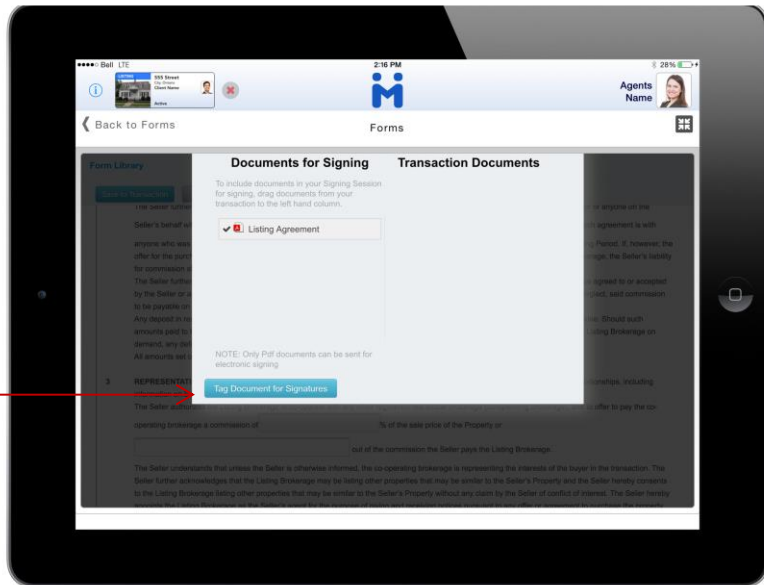
- c. You can “Add another signer” if there is a third party to sign the document who is not listed as a client for the Engagement: Select “Add another signer” and enter their “First Name”, “Last Name”, and “Email”

Please note, for each party:

- The Routing #* will default to 1
- The Signer Type* will default to **InPersonSigner**
- An option to set a Password is available for added security. Please note, there are no requirements for the password and it can be an individual letter, number or special character

* Additional information about the Routing # and Signer Type options will be explained later Electronic Signing options section on page 34 of this guide.

- 4. Scroll down the window and select the form you would like to sign under “**Transaction Documents**” and drag it to the left side of the window under “**Documents for Signing**”



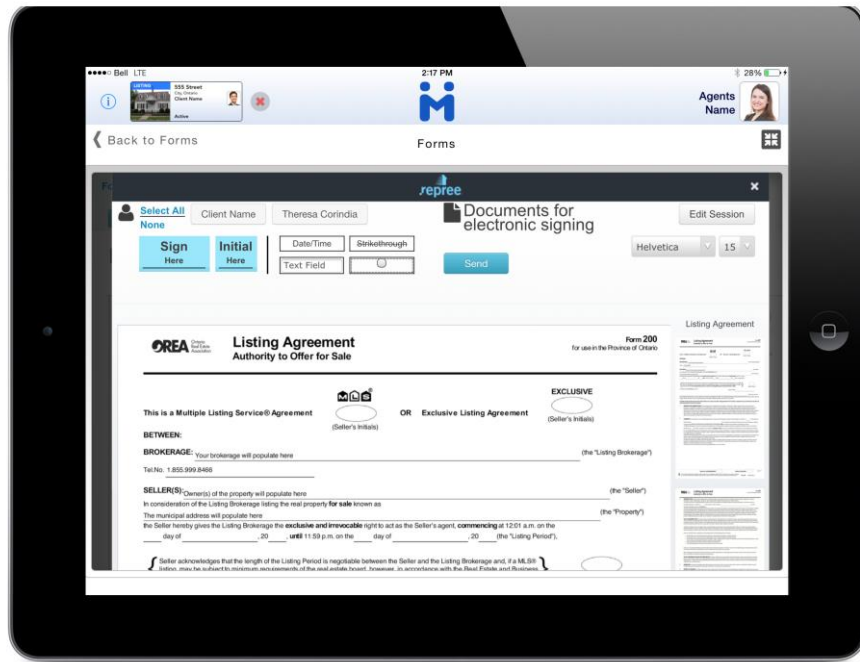
Tag Document for Signatures

- 5. Select “**Tag Document for Signatures**” located at the bottom of the page in the blue button.





- The form will appear on the screen and you can review it with your client and tag it using the options available in the menu at the top of the window:



You can **Select All** to choose all signers or select **None** to deselect them.

To select a signer individually tap on their name and a check will appear beside it Client Name.

The tag options are Sign Here, Initial Here, Date/Time, Text Field, Strikethrough, and Checkbox



You can change the default font style and font size by touching the down arrow to the right. The font styles available are Helvetica, Courier and Times Roman. The font size available is 9 pt. to 20 pt.



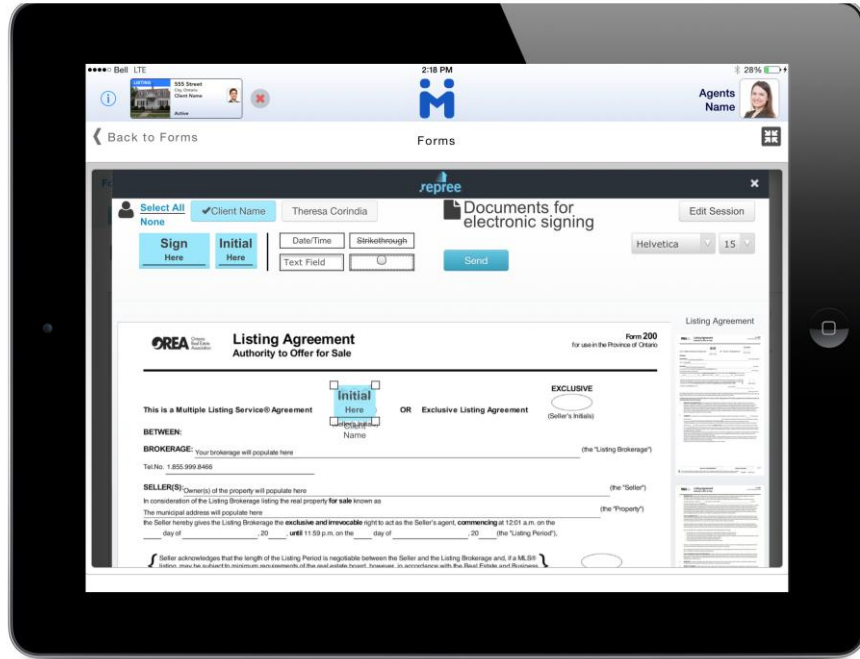
Please note – the default font is Helvetica and the default font size is 15 pt. If you choose a different font type or size it will change for the current form only and will be reset to the default for any subsequent forms.

The button will return you to the repree™ electronic signing window where you select the signers.

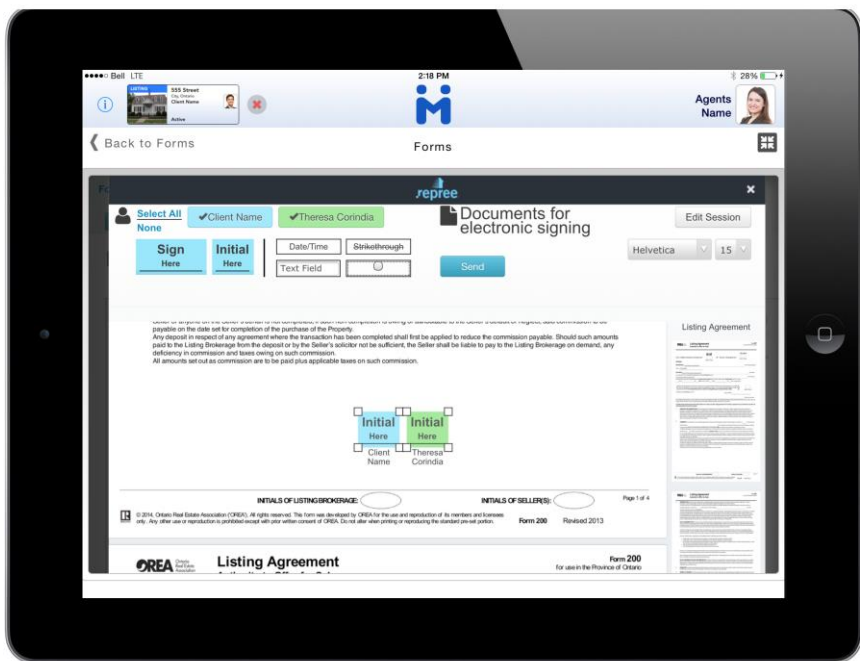


7. Tagging a form

a) To start tagging select the party, the tag option and drag it to the area of the form.

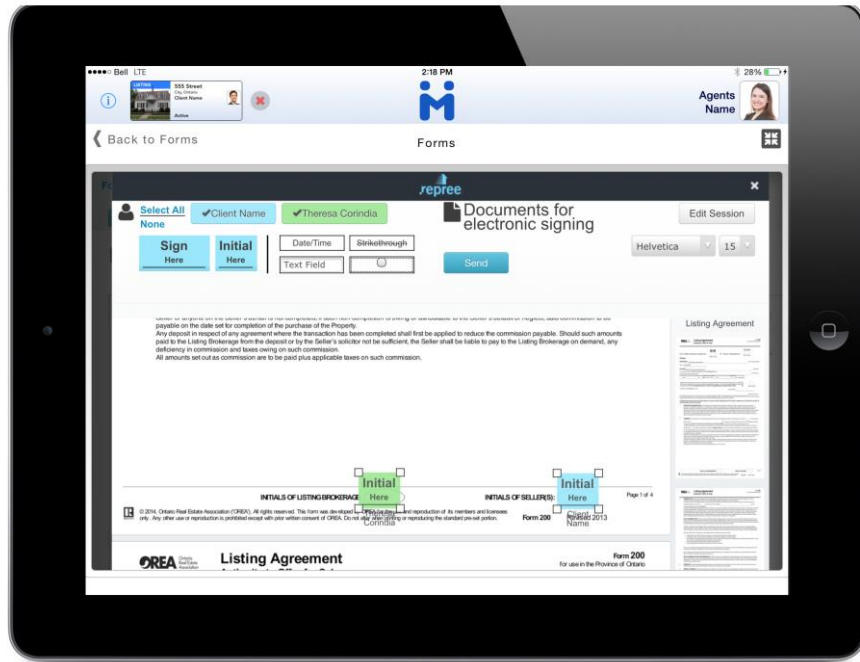


b) You can choose multiple parties and drag a tag option for each to the form.
Note – each party will be assigned a different colour.

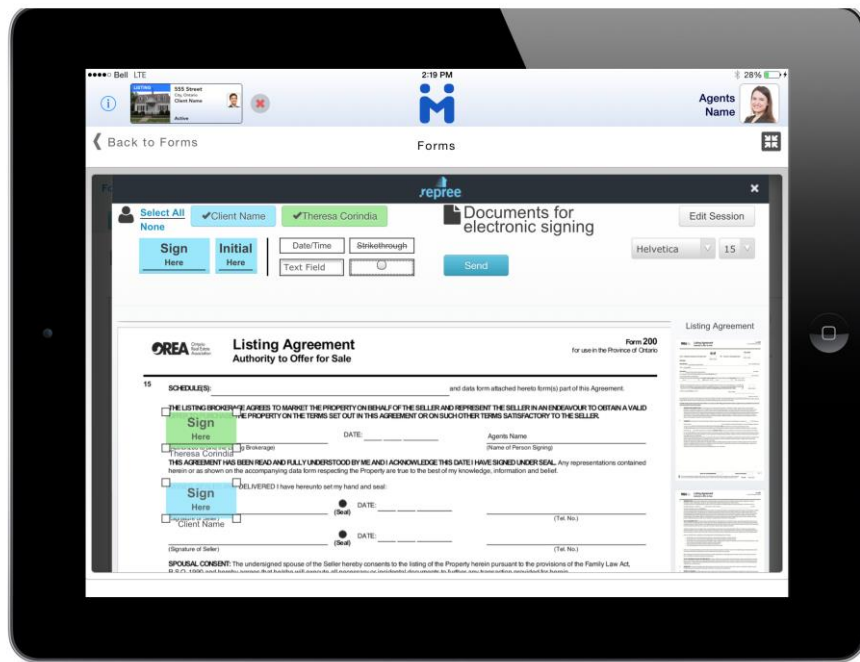




c) The tags can be separated and dragged to the area of the form for each party.

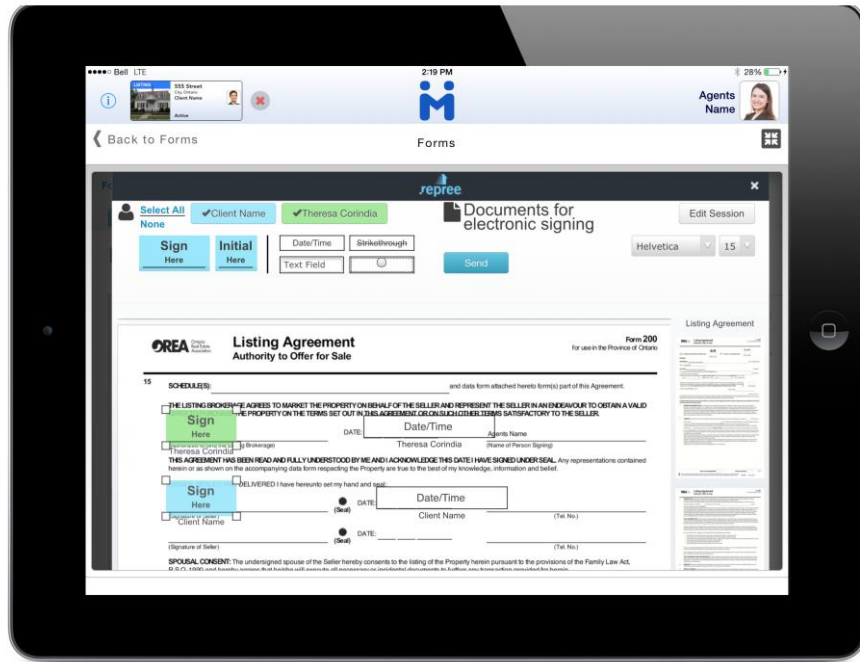


d) Continue reviewing the document and tag signatures





e) Tag Date/Time stamps

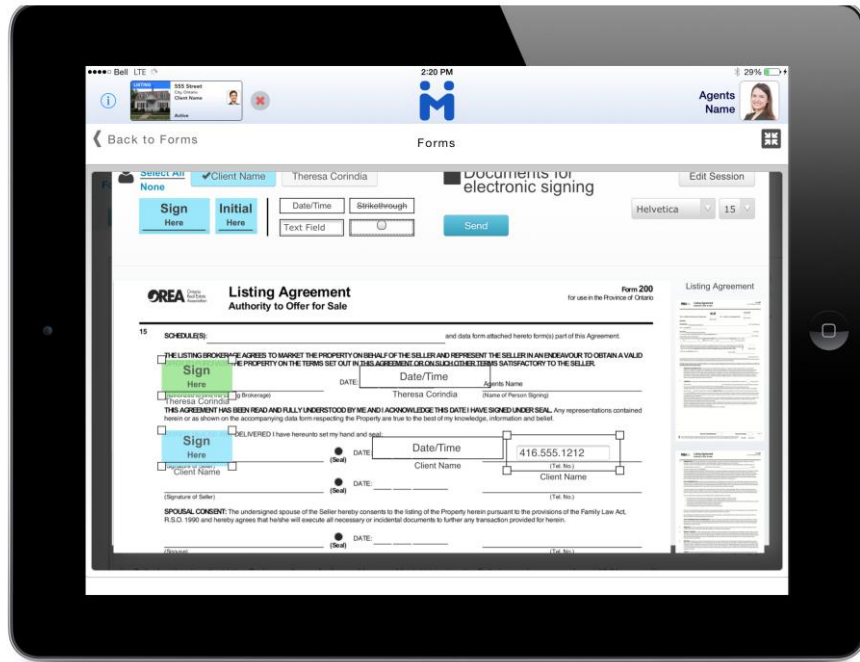


f) Insert Text and a Checkbox (not shown)

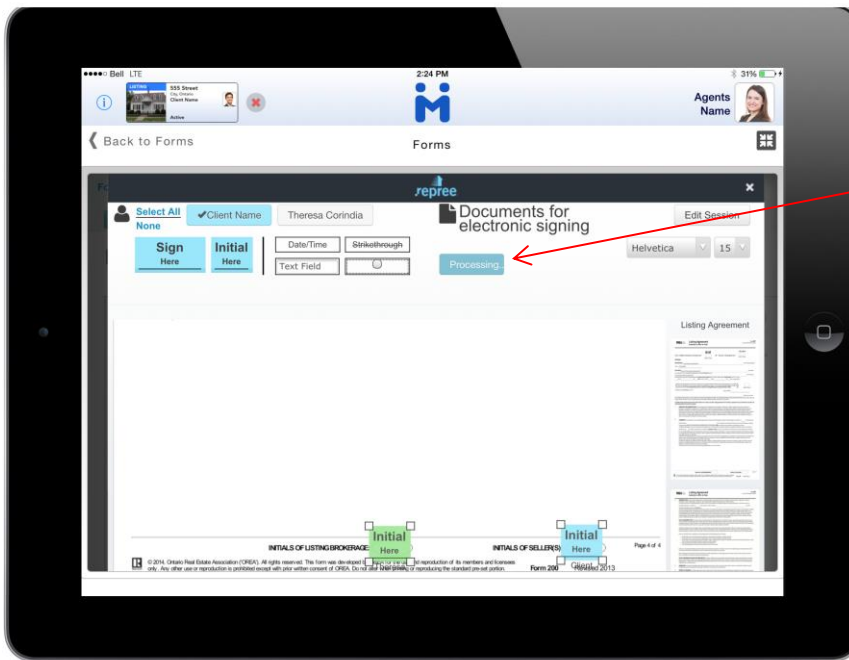




g) Continue to review the form until it is tagged in all areas for all parties



h) Once you have completed the review of the document and tagged all areas select **“Send”** The document will then indicate **“Processing”**



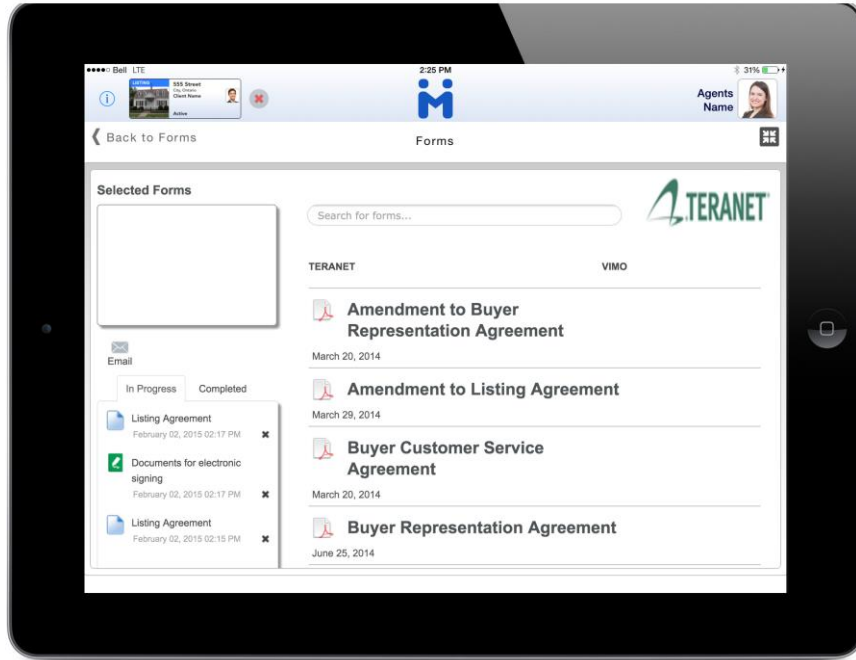
Processing



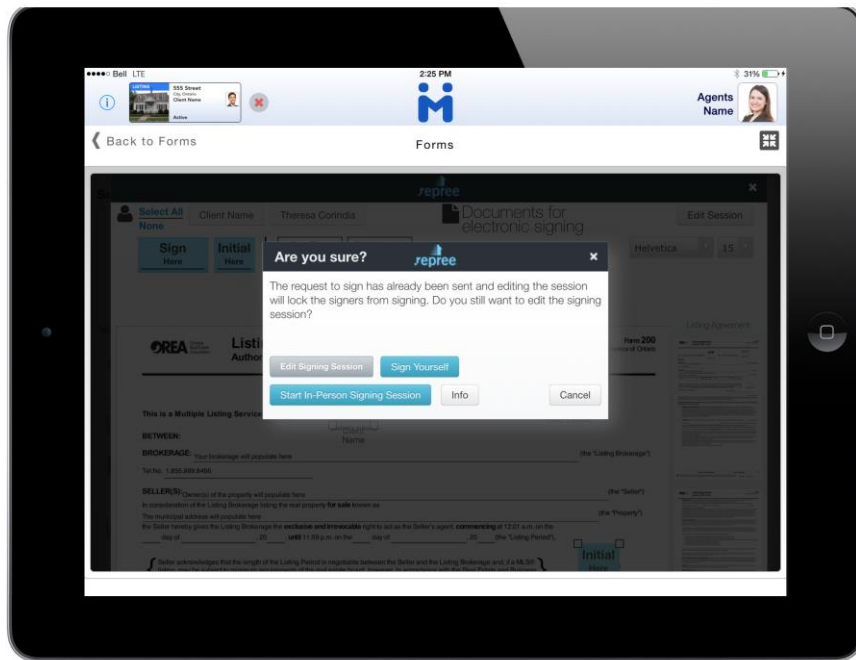


8. In-Person Signing

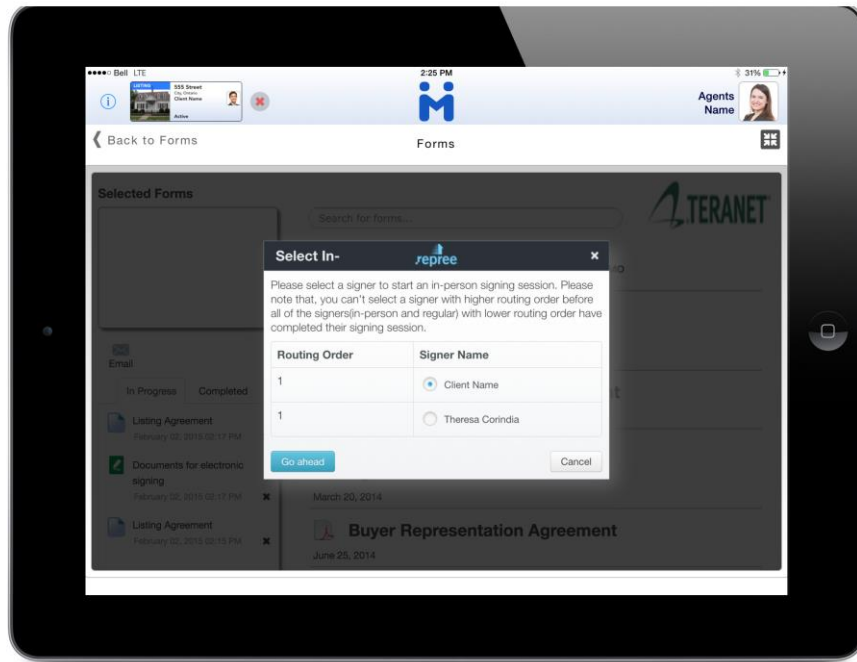
- a) You will be returned to the “Forms” menu. To start signing, select **“Documents for electronic signing”** from the **In Progress** section



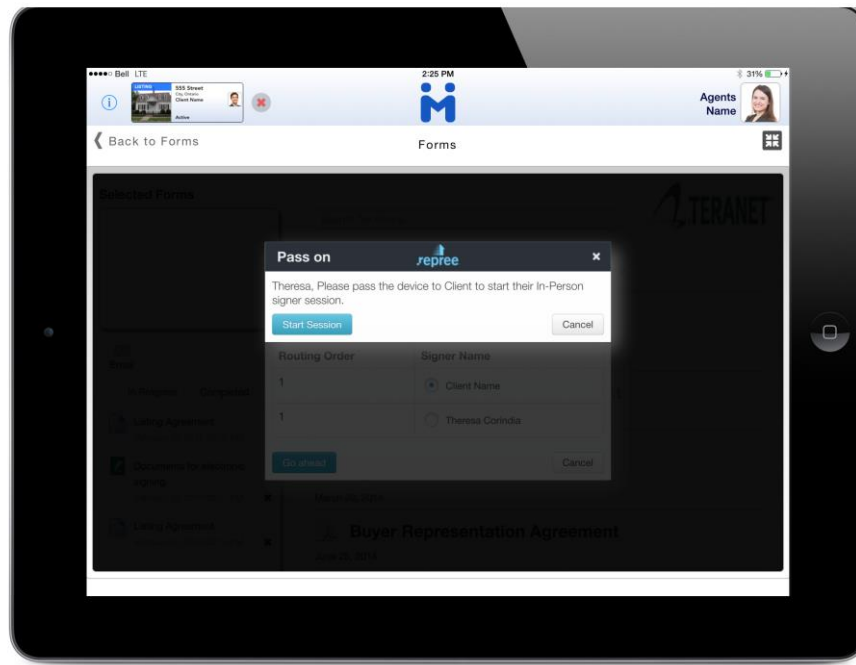
- b) A confirmation window will be presented, select **“Start In-Person Signing Session”**



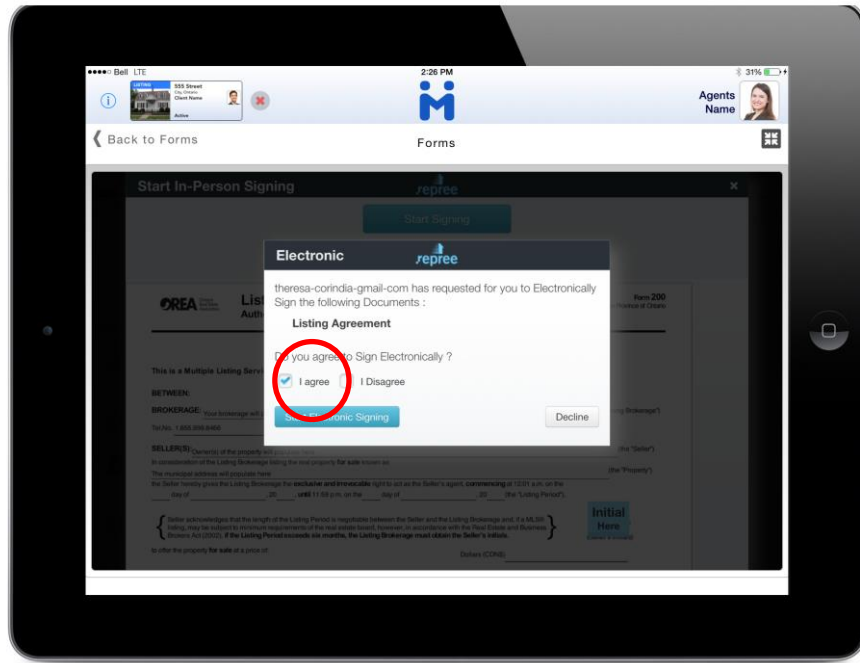
- c) A window will open where you select the Signer Name by placing a bullet beside it and then select **“Go ahead”**



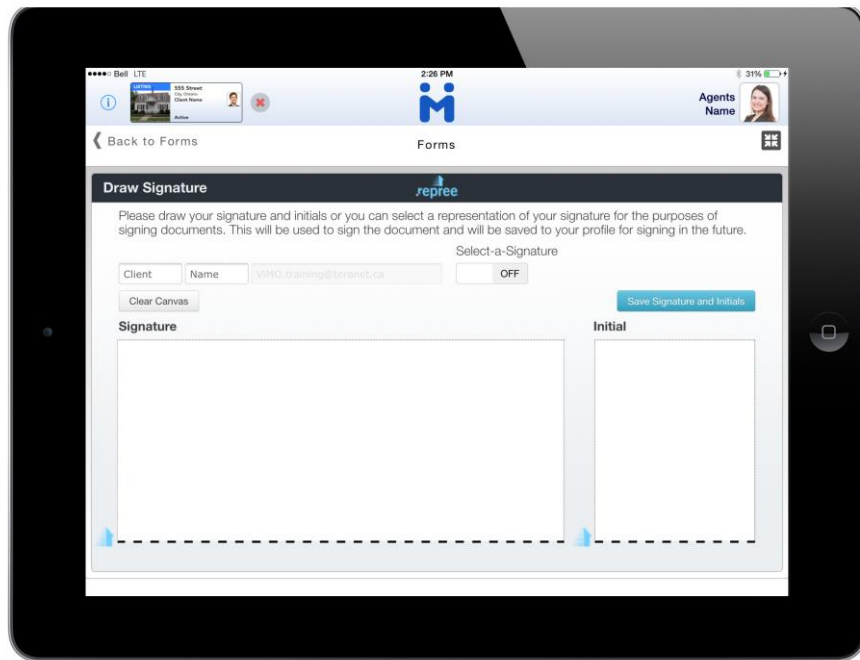
- d) The **“Pass on”** message will instruct you to pass the device to the client to start their In-Person signer session. Instruct your client to select **“Start Session”**.



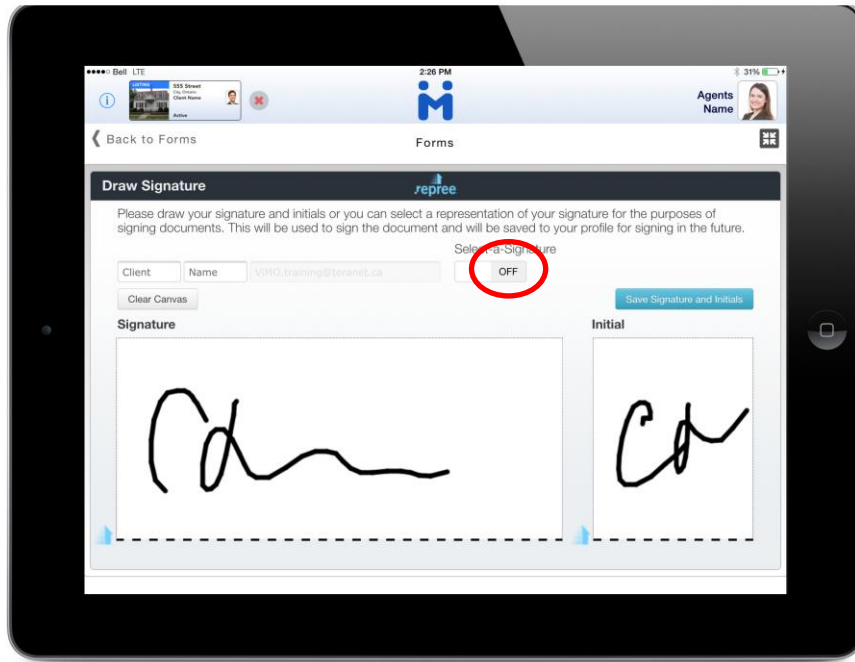
- e) A window will appear that will ask your client to agree to Sign Electronically. Select **“I agree”** then **“Start Electronic Signing”**.



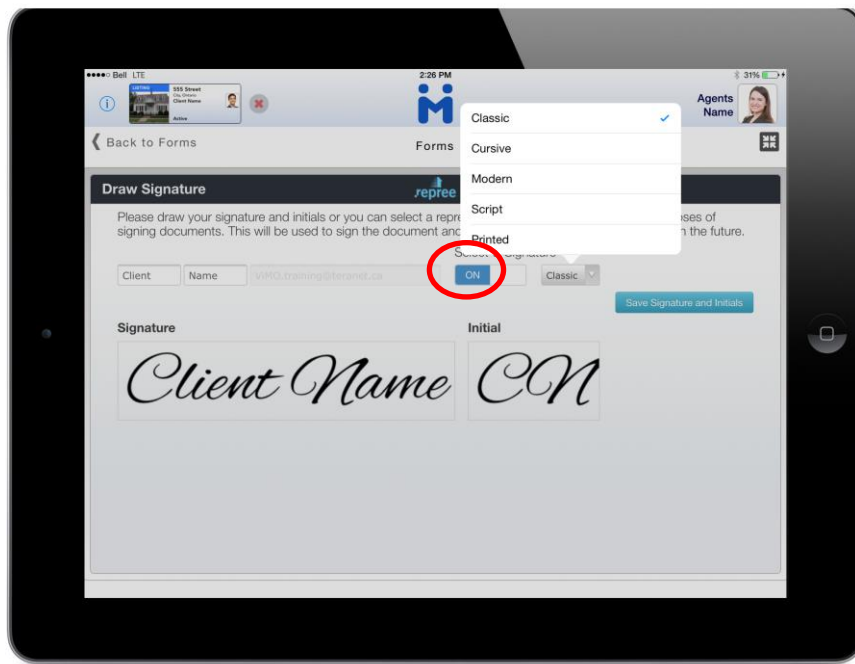
- f) A new window will appear to **“Draw Signature”**.



- i. If you select **“OFF”** under **“Select-a-Signature”** then you can draw your Signature and Initial with your finger or stylus pen. **“Clear Canvas”** will remove your drawn signature and initial if you are not satisfied the first time and you can try again.



- ii. If you select **“ON”** under **“Select-a-Signature”** then you can select a signature from Classic, Cursive, Modern, Script and Printed.

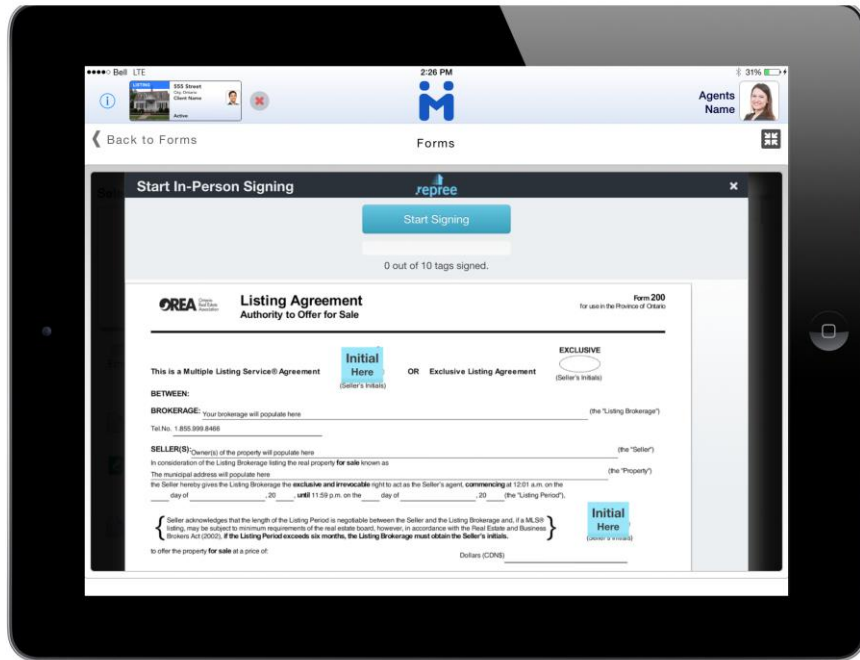




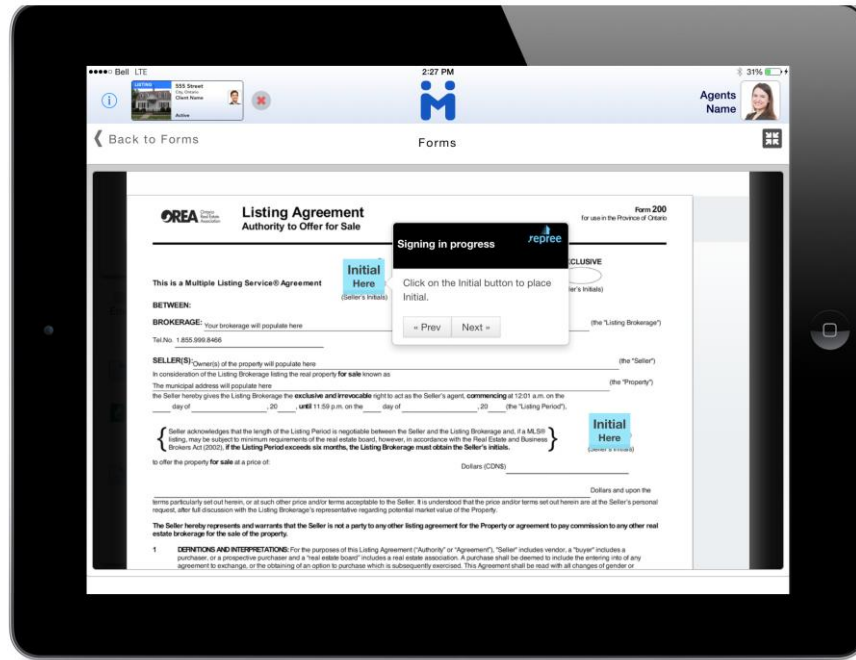
g) Once you are satisfied with your 'Signature' and 'Initial' select **“Save Signature and Initials”**



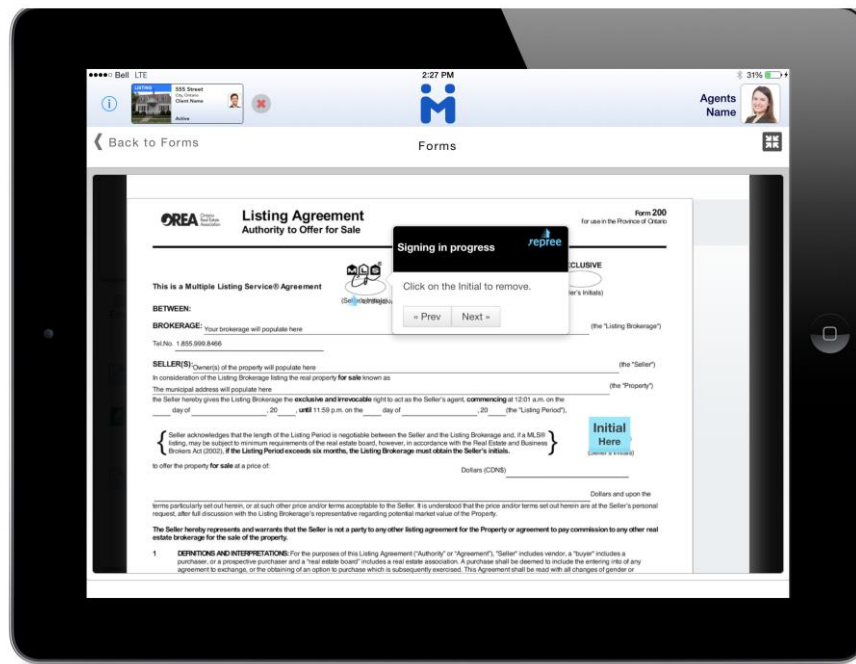
h) The form will display on the screen and you select **“Start Signing”**



- i) You will be directed to the first tag and a window will open with instructions. To Initial a **“Click on the Initial button to place Initial”** message will appear. Select **“Initial Here”**.

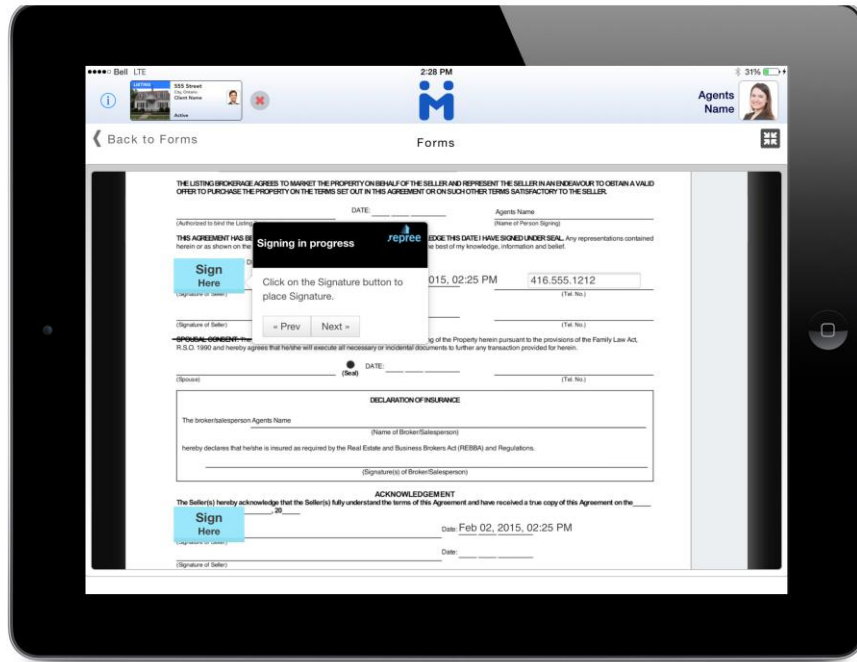


- j) Your initials will replace the tag and a window will appear to direct you to the **Prev** (previous) or **Next** tag. You can also **“Click on the initials to remove”**. Select **“Next”**

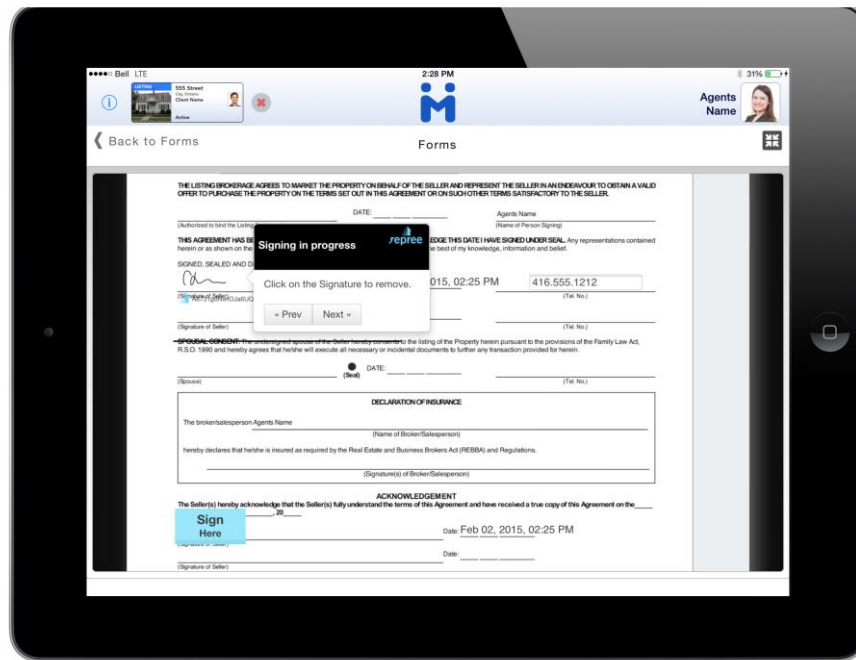




- k) For a Signature, a **“Click on the Signature button to place Signature”** message will appear. Select **“Sign Here”**.

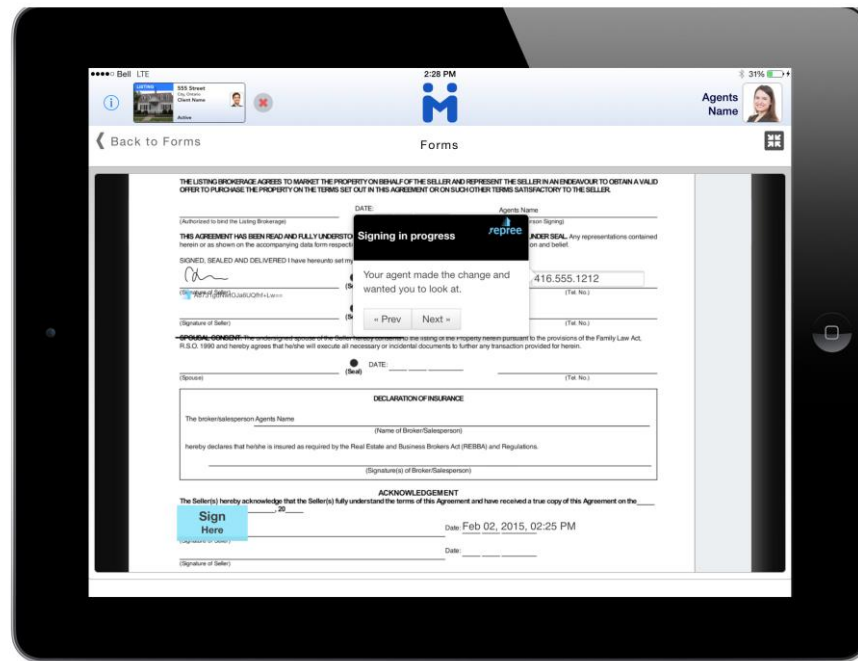


- l) The signature will replace the tag, to continue select **“Next”**

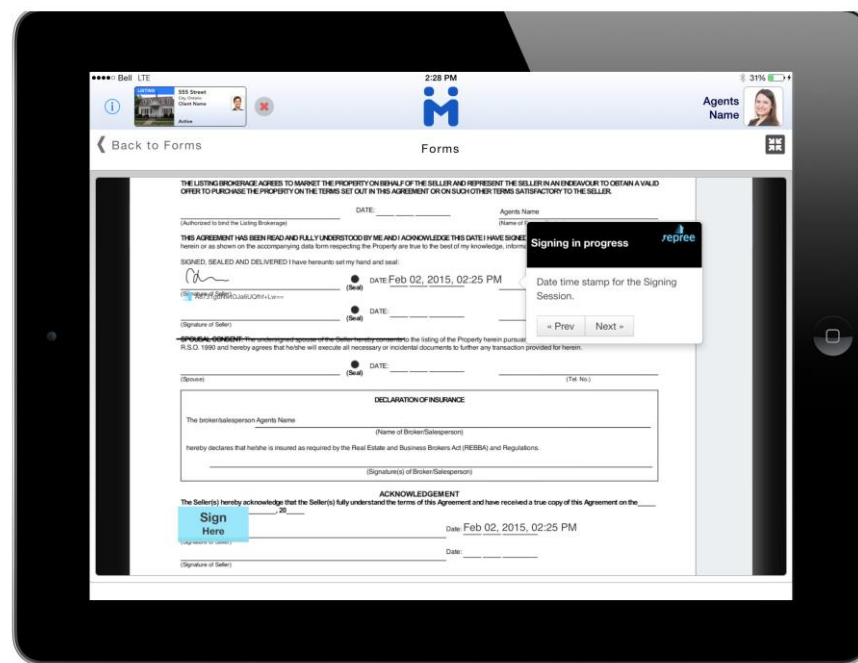




- m) If you added a text tag, a message will appear to advise **“Your agent made the change and wanted you to look at it”**. Select **“Next”**.

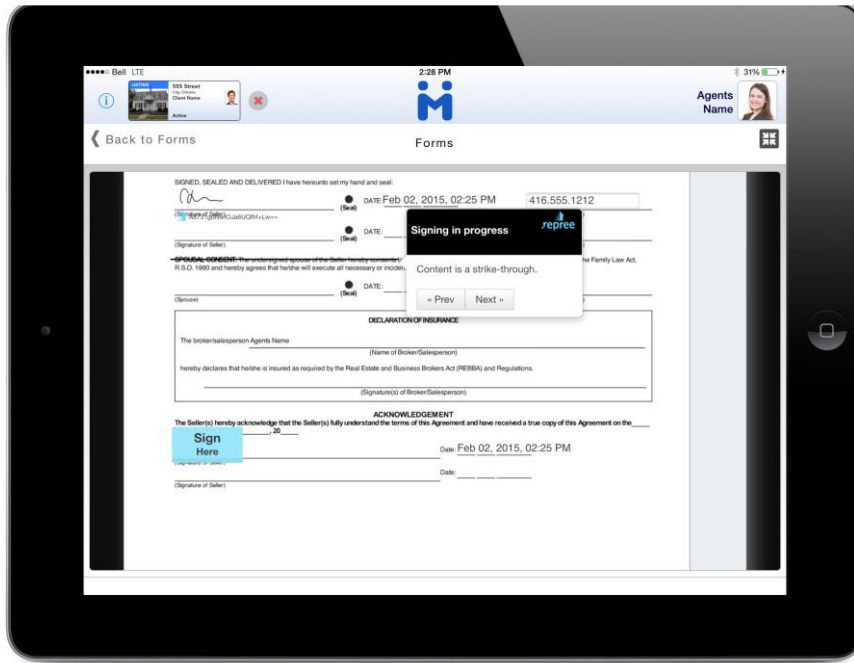


- n) If you added a Date/Time tag, a message will appear to advise **“Date time stamp for the Signing Session”**. Select **“Next”**

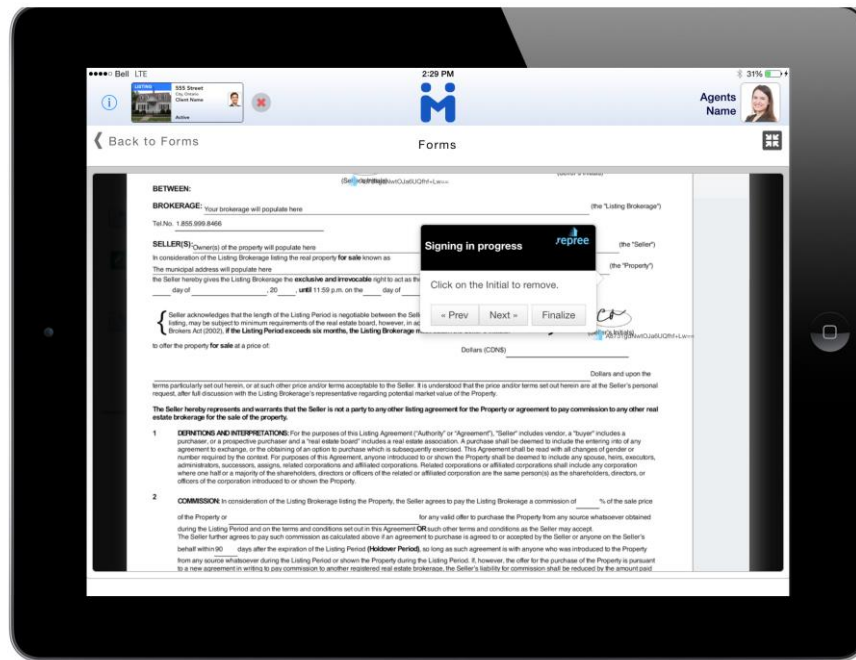




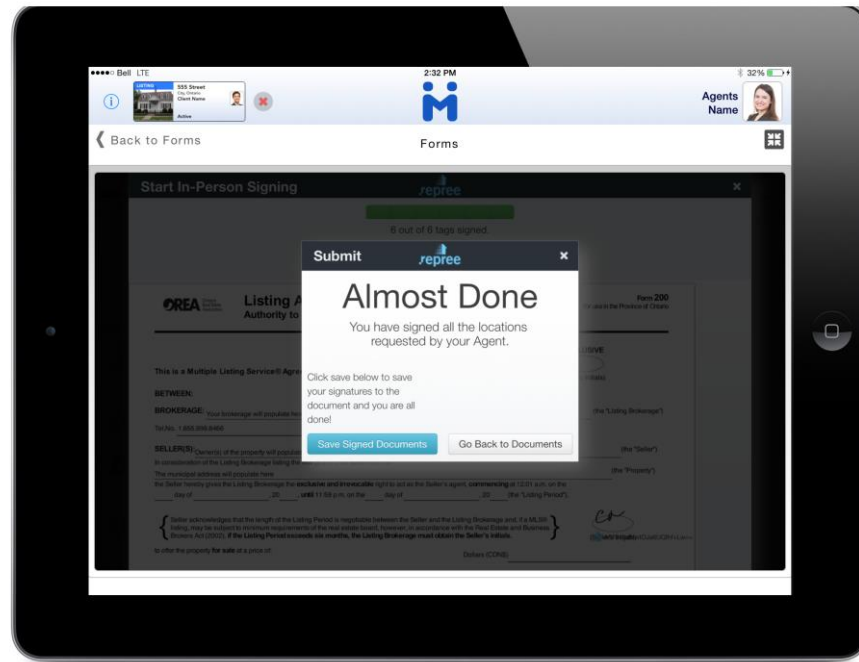
- o) If you added a **Strikethrough** tag, a message will appear to advise **“Content is a strike-through”**. Select **“Next”**



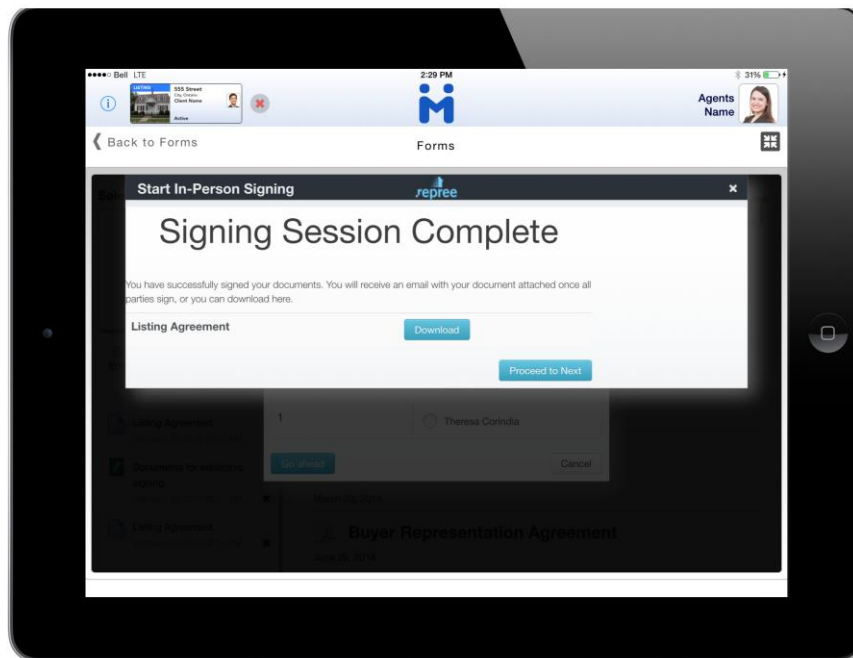
- p) Once you have reviewed and approved all tags select **“Finalize”**



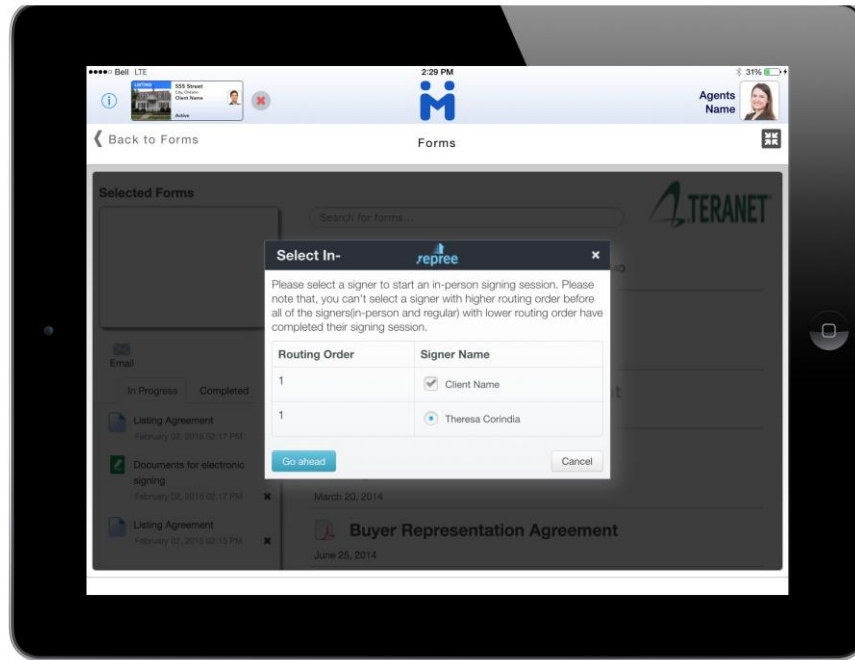
- q) A window will appear to confirm you have signed all locations requested; select **“Save Signed Document”** if done; select **“Go Back to Documents”** to review again.



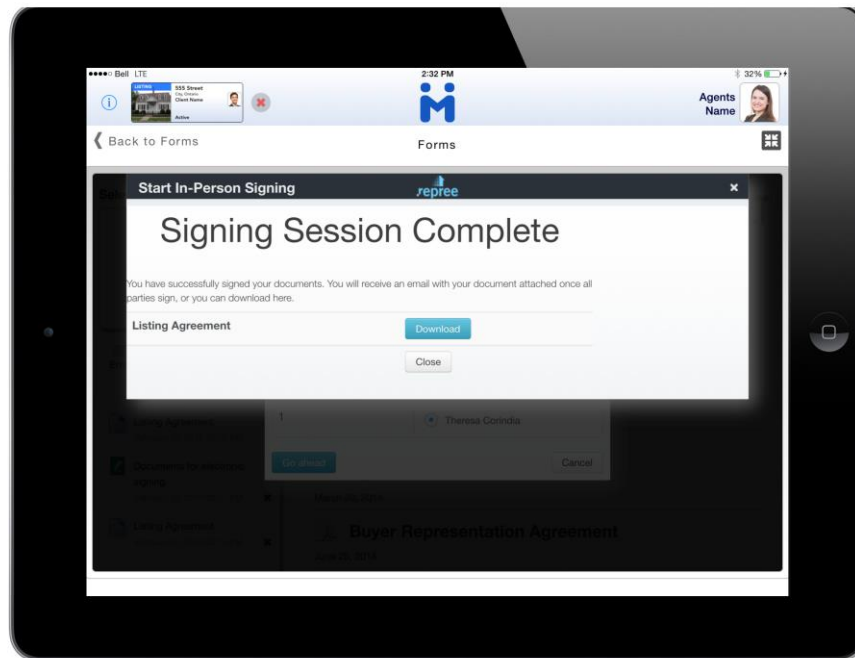
- r) A confirmation window will appear and you select **“Proceed to Next”**



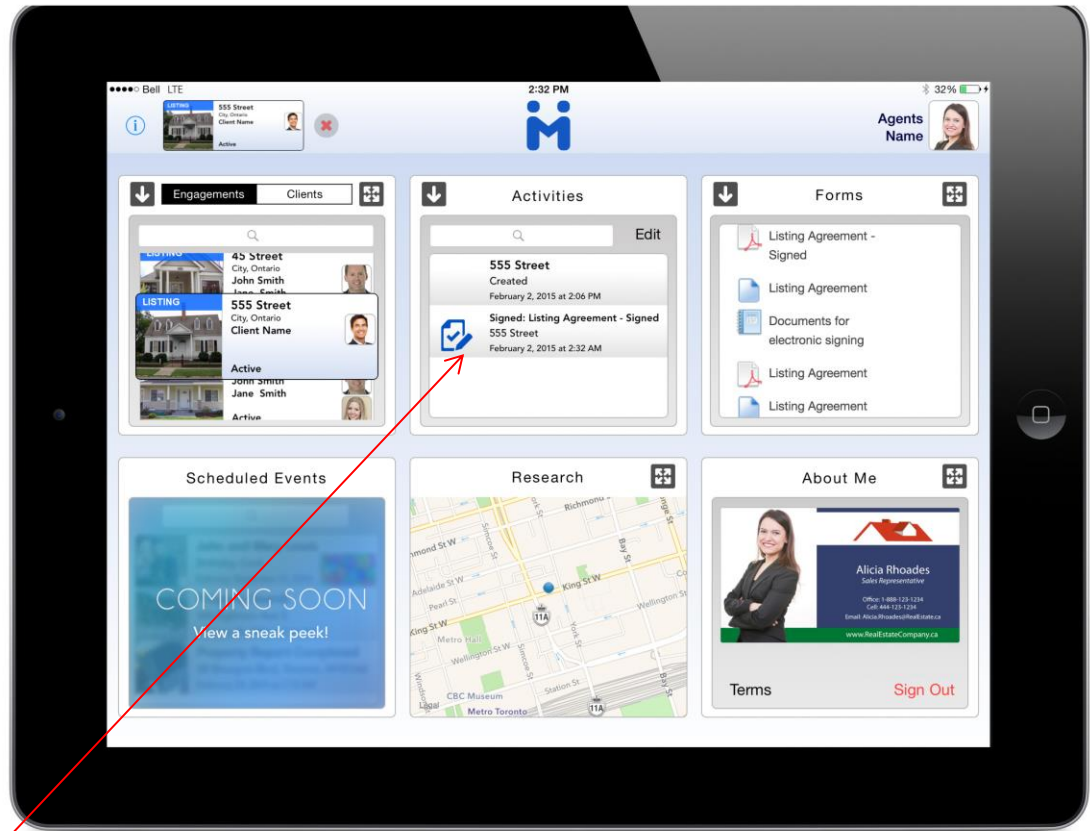
s) Select the next signer by placing a bullet beside their name and then **“Go ahead”**



t) Repeat steps **d to r** above for each person to sign. Once done, a message will be presented to confirm completion of the session, select **“Close”**



- u) A copy of the signed document will appear in your **“Activities”** module in ViMO and a copy will be emailed to all parties.



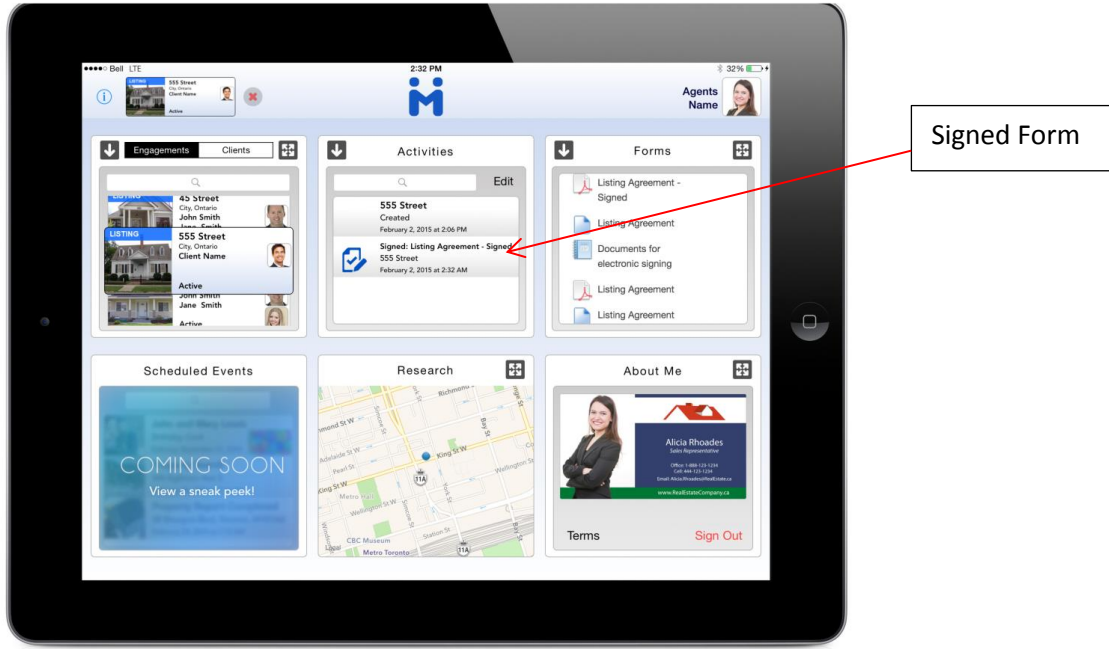
Copy of Signed Document



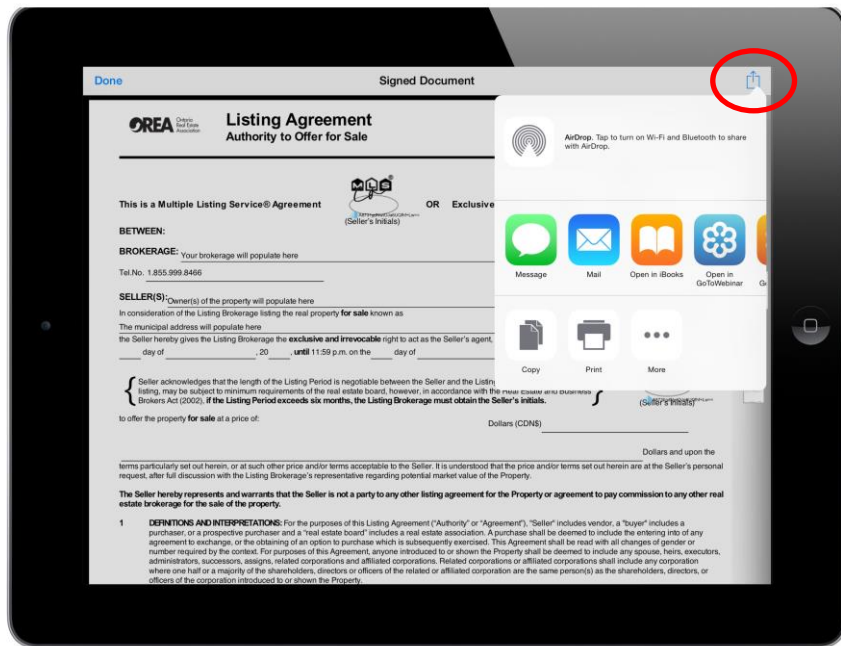


Section 3: Instructions on How To Email Forms: Signed Forms

1. Select the signed form in the Activities module on the dashboard



2. Select the iPad share icon  and Mail to create an email





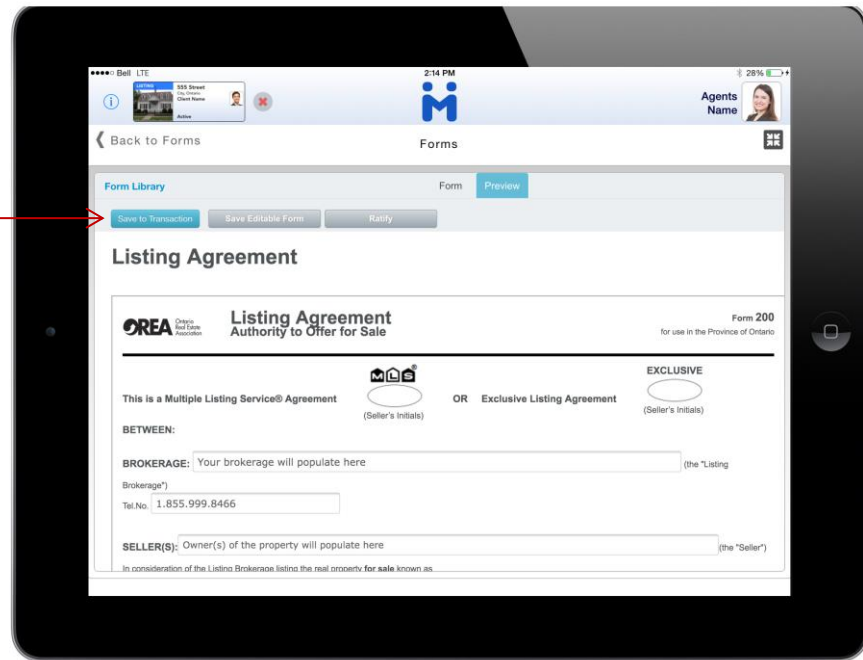
Unsigned Forms

Completed forms can be emailed in ViMO if you decide not to use the electronic signing feature.

To create a form, follow the steps outlined in Creating and Filling Forms (Section 1).

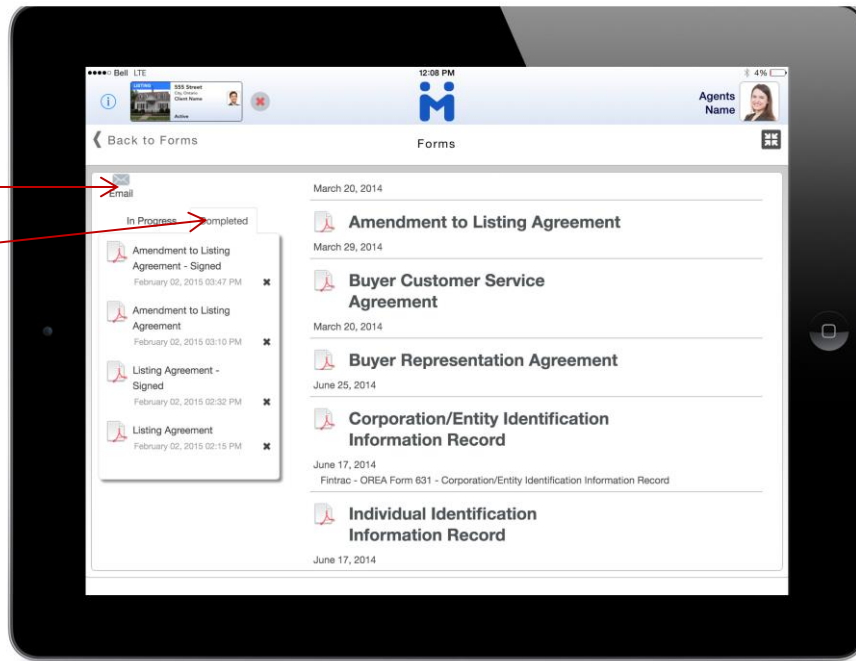
1. Once the data entry is complete, review the form in the **“Preview”** tab then select **“Save to Transaction”** to save a non-editable PDF version.

Save to Transaction

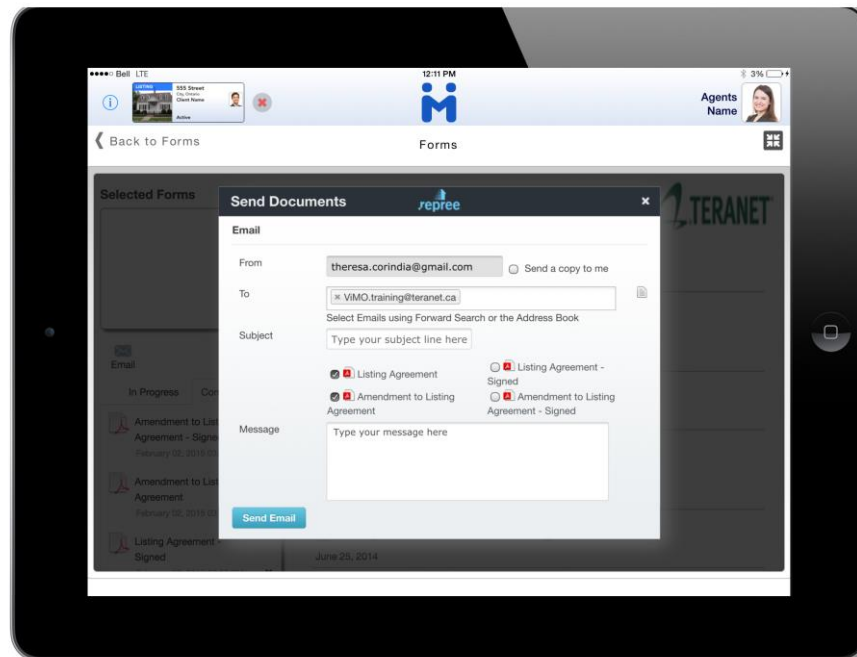


2. A copy of the PDF is available in the **“Completed”** tab from the **“Forms”** menu. To email the form, select the **“Email”** icon





3. Select **To** from your client list in ViMO, enter a **Subject**, and place a check beside the PDF of the form, type a **Message** and “**Send Email**”.



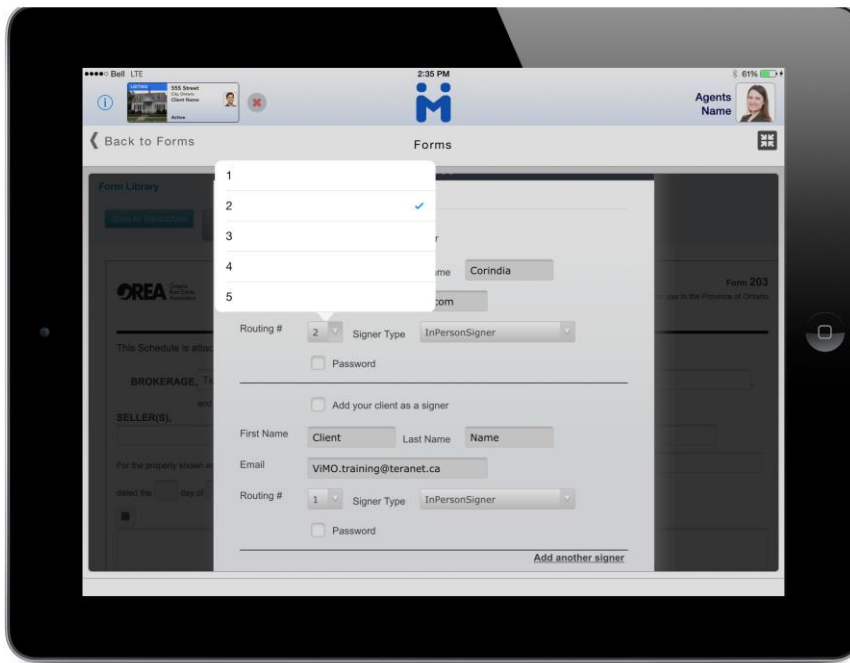


Section 4: *Electronic Signing options:

When you Select your Signers in the repree™ Electronic Signing window the defaults are set to **Routing # “1”** and **Signers Type “InPersonSigner”**.

a) The **Routing #** can be changed to control the order in which each signer signs the form.

To change the order, select the drop down arrow to the right of the number and choose from numbers 1 to 5 for each signer.



b) There are 4 options available under **Signer Type**: **Signer**, **Carbon Copy**, **InPersonSigner**, and **Agent**.

- ❖ **Signer** is the option to select if you would like to email the form(s) for signing. An email will be sent to the client with a link to access the form(s). The instructions and steps to sign are very similar to the **In-Person Signing** steps described on pages 19 to 28 of this guide.
- ❖ **Carbon Copy** will send a copy of the signed form once completed by all signers. This option is selected for a party who requires a copy of the form but does not need to sign it.
- ❖ **InPersonSigner** is the option to select to sign the form on your iPad while with the client.





❖ **Agent** option is not recommended to be used at this time.

To change the **Signer Type**, select the drop down arrow to the right of **InPersonSigner** and choose either **Signer** or **Carbon Copy**.

