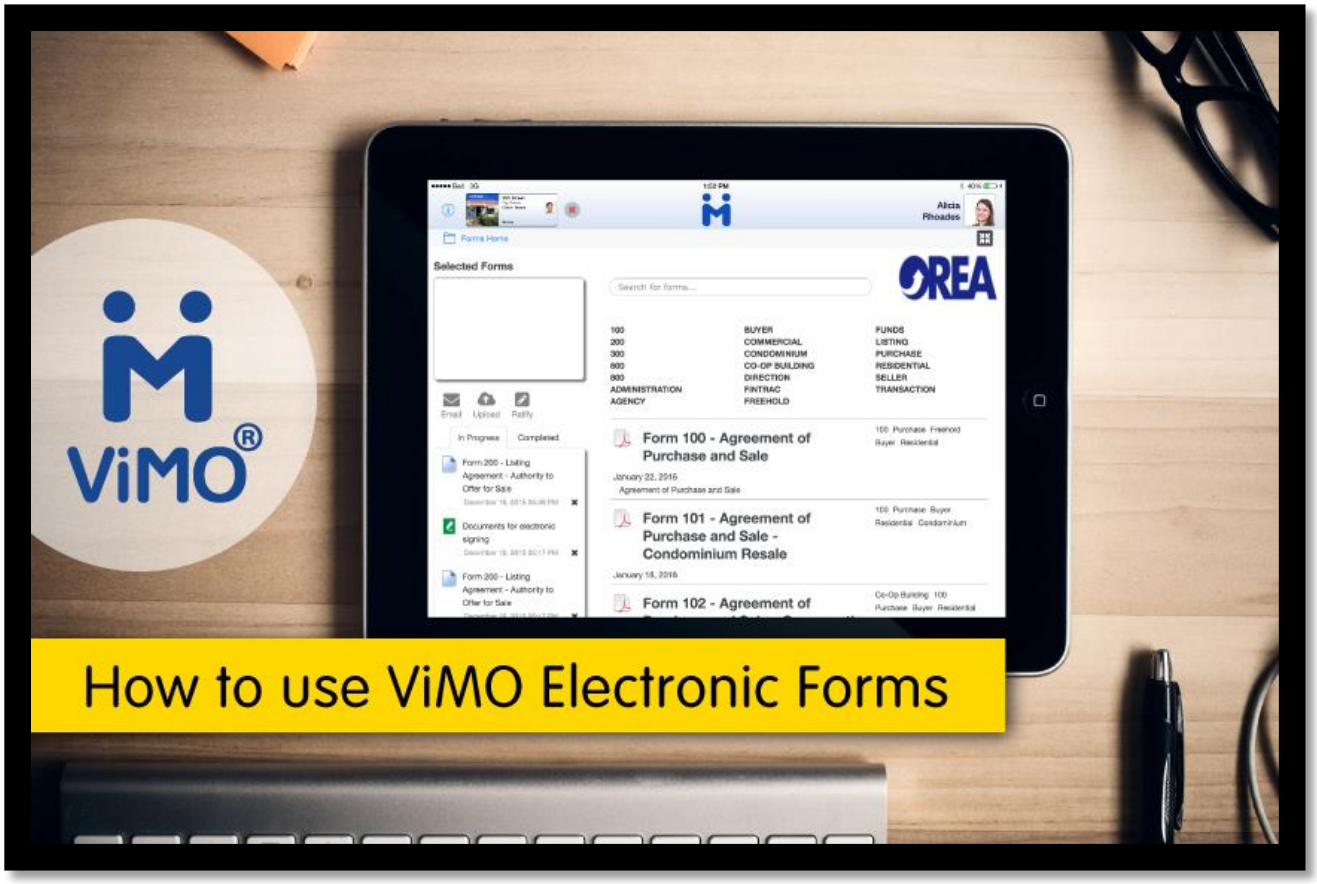
How To Series: ViMO Digital Forms with e-signature capability

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.



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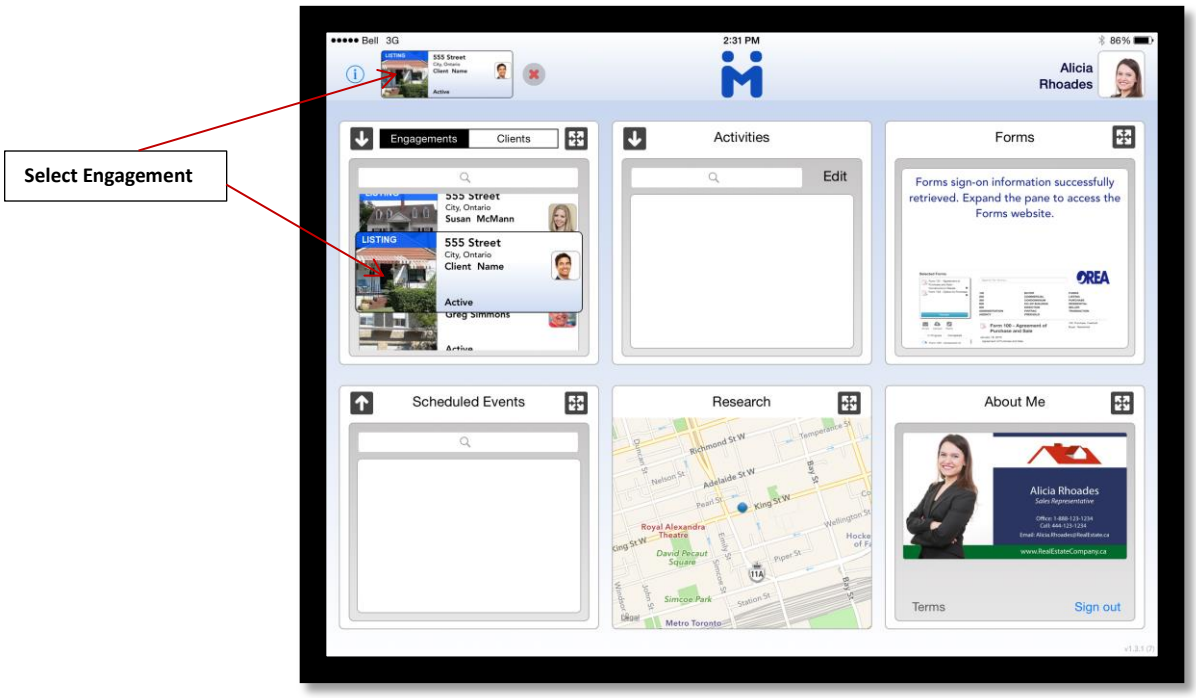
Section 1: Creating and Filling Forms

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.

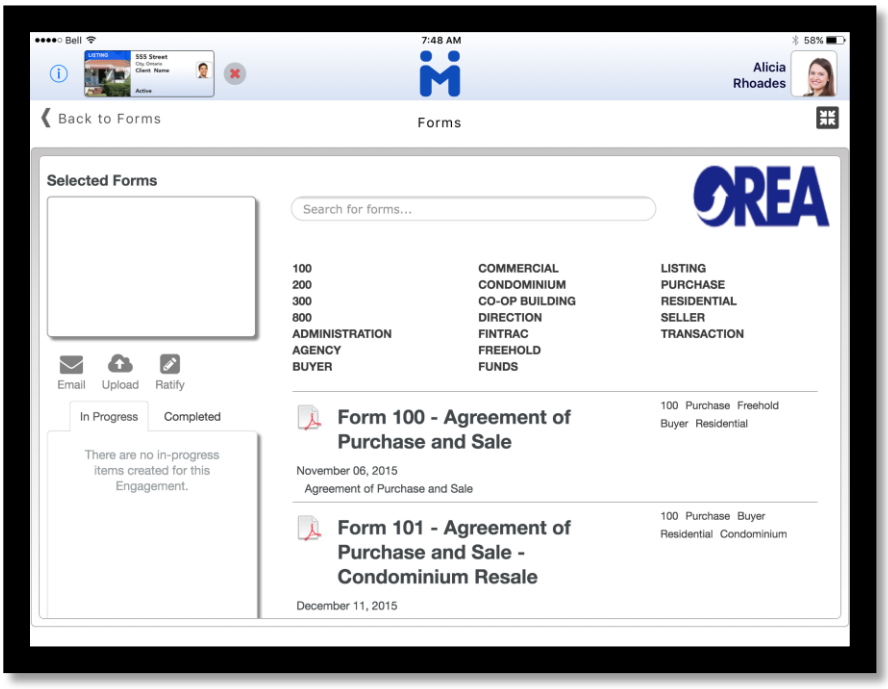


You will notice the '**X**' to the right of the active "**Engagement"** which allows you to easily deselect it when done. Please note that deselecting an "**Engagement"** will reset the "**Forms"** screen.

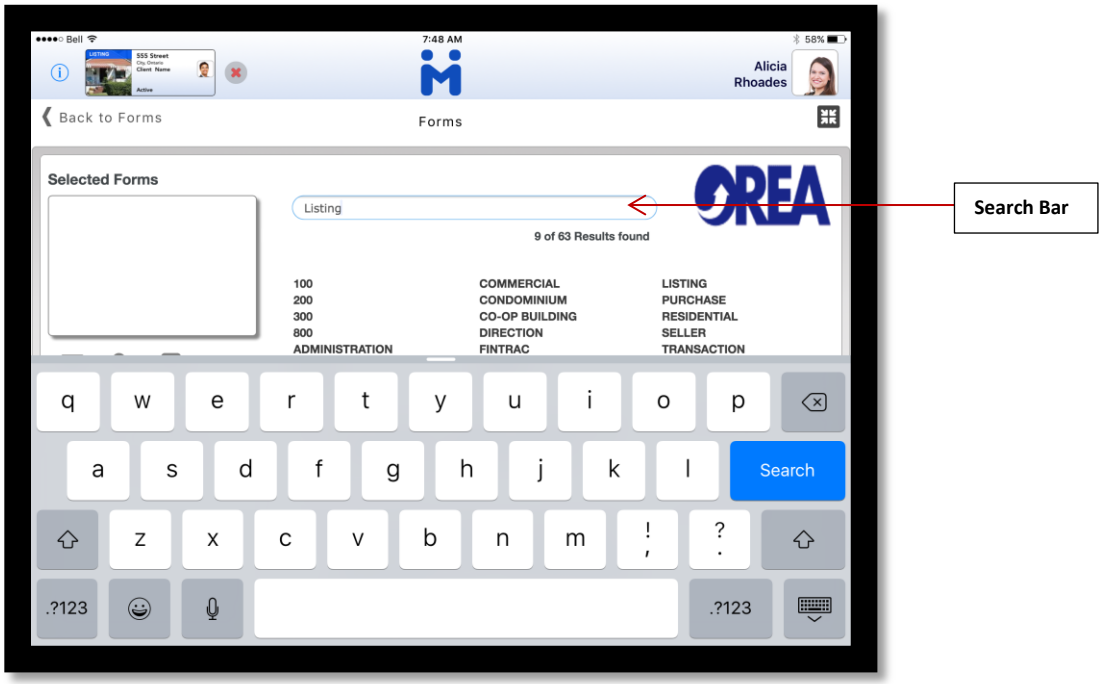
2. Within a few seconds, the "**Forms"** section will list any active forms available for the given Engagement.

Expanding the "**Forms"** section will reveal your forms' library based on Standard Forms and Clauses provided by OREA.

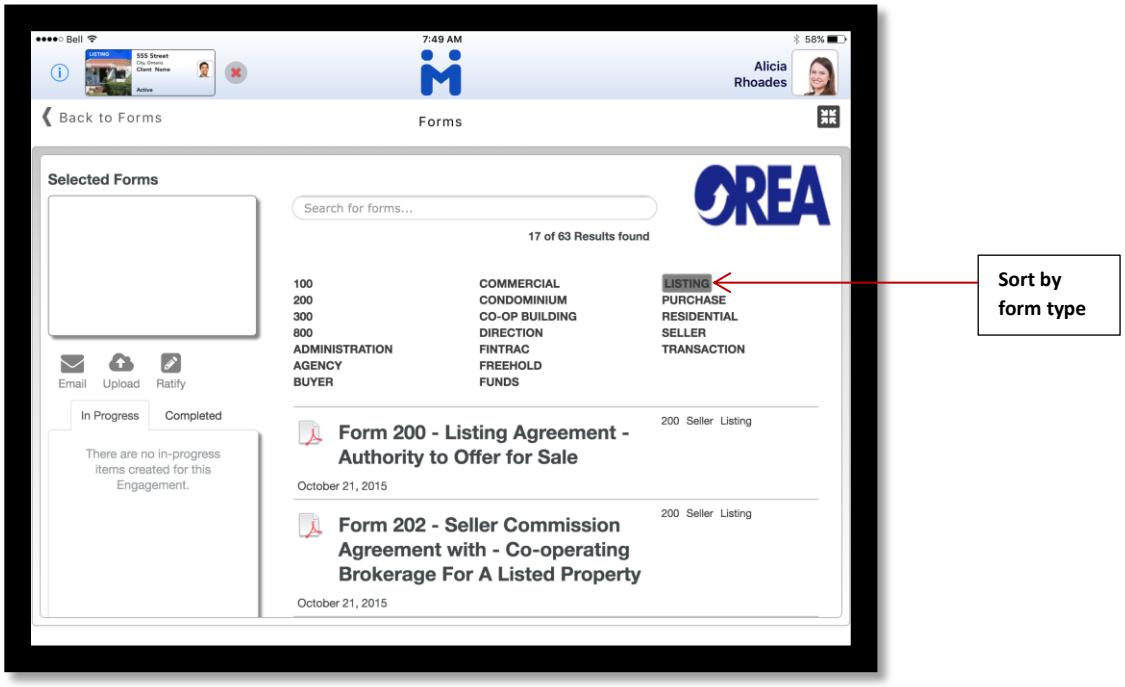
Forms will appear in numeric order within the main list.



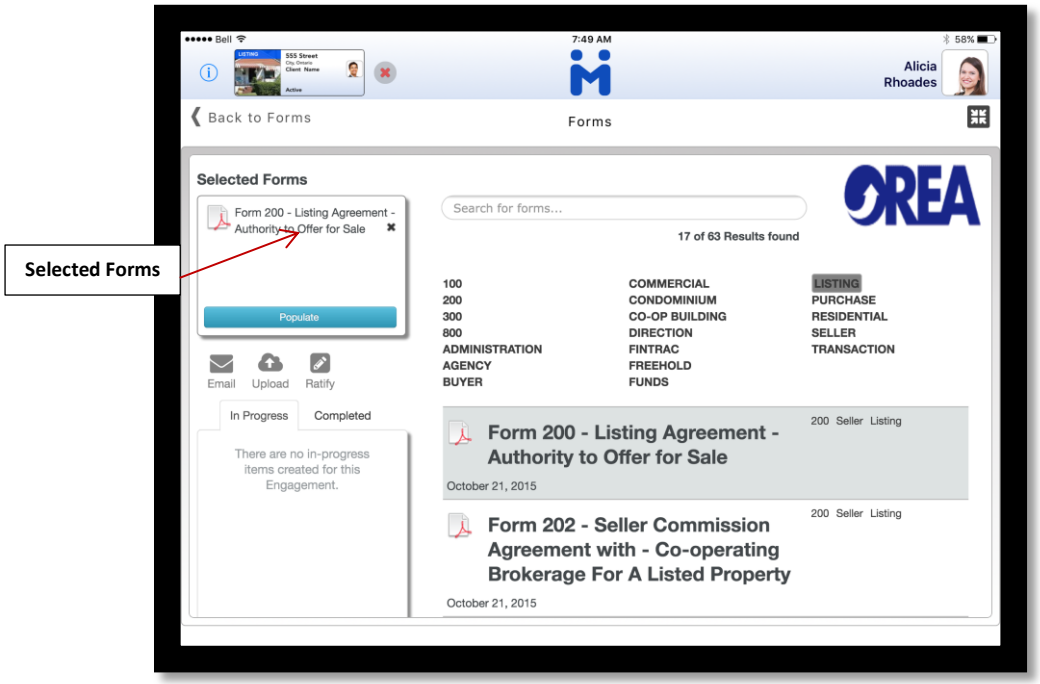
At the top you will notice a search bar where you can type in a keyword and the "**Forms"** list will reveal the available options.



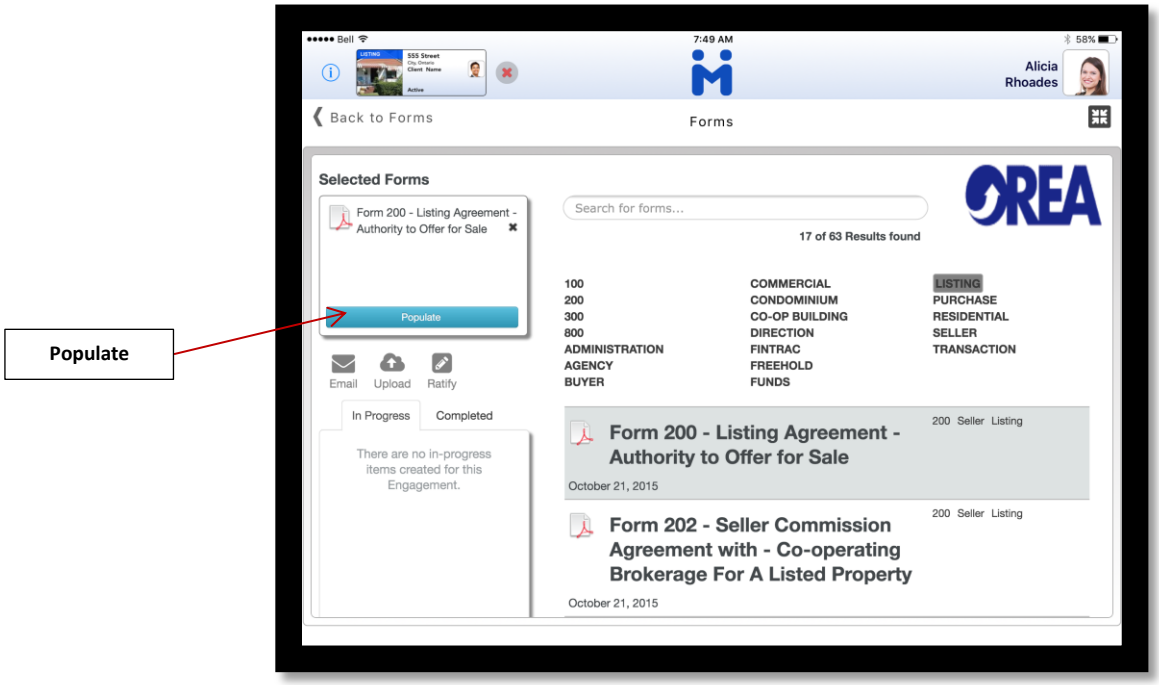
3. Forms can also be sorted by the numeric series or transaction type. To sort by the form type, select type (i.e. LISTING) and only “LISTING” related forms will display.



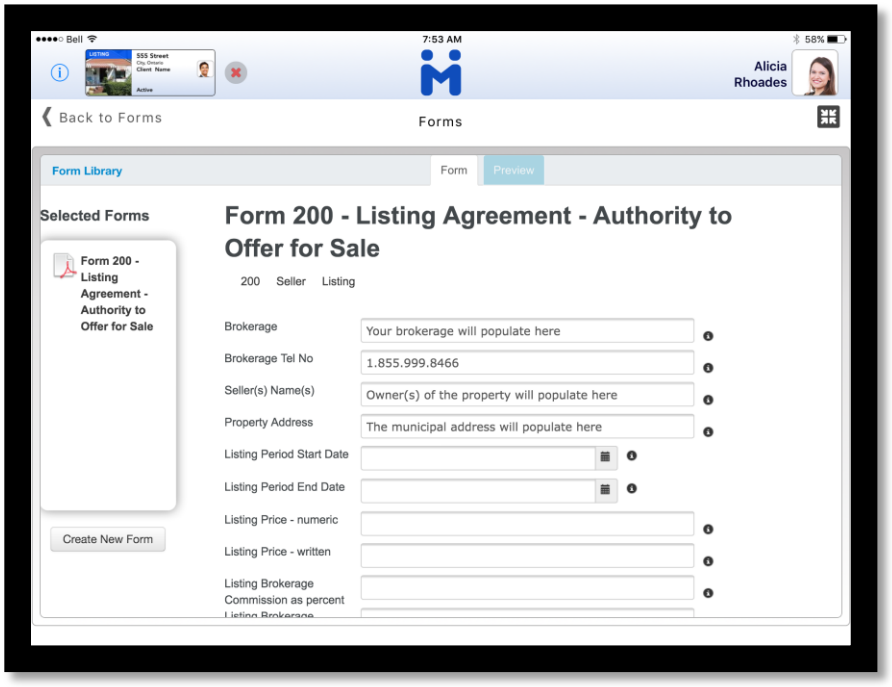
4. Selecting Forms: You can choose one or more forms by selecting the form’s title (s). As you select you will see the forms appear in the “**Selected Forms”** box in the top left.



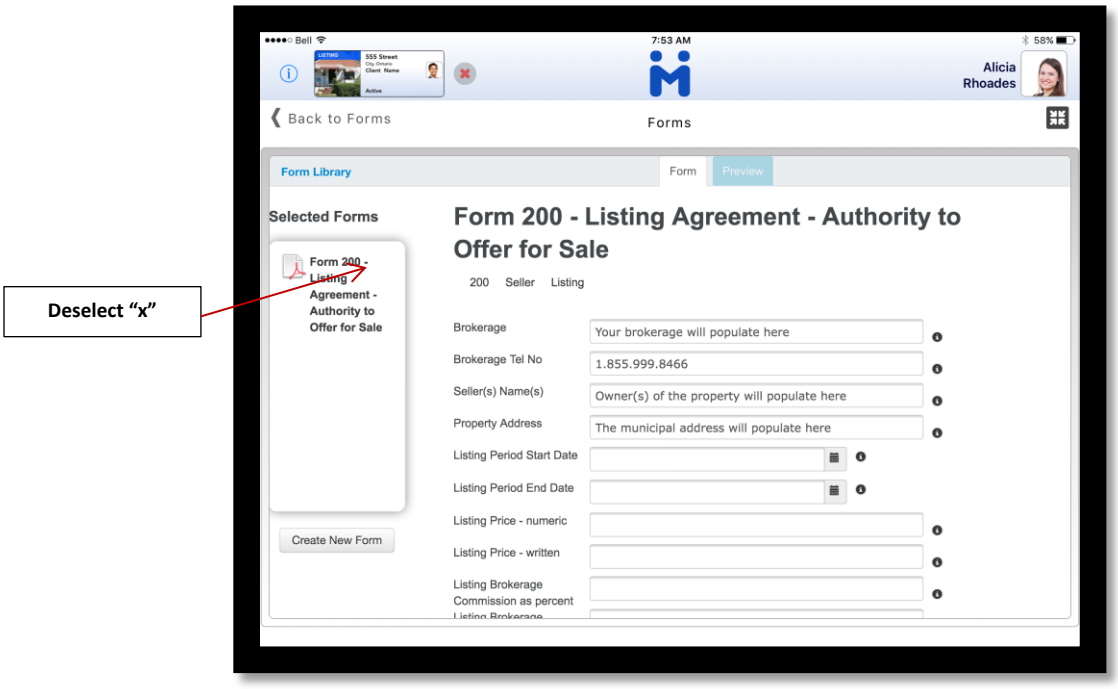
5. Populating Forms: To open and populate a form, select the blue **"Populate"** button located at the bottom of the **"Selected Forms"** section.



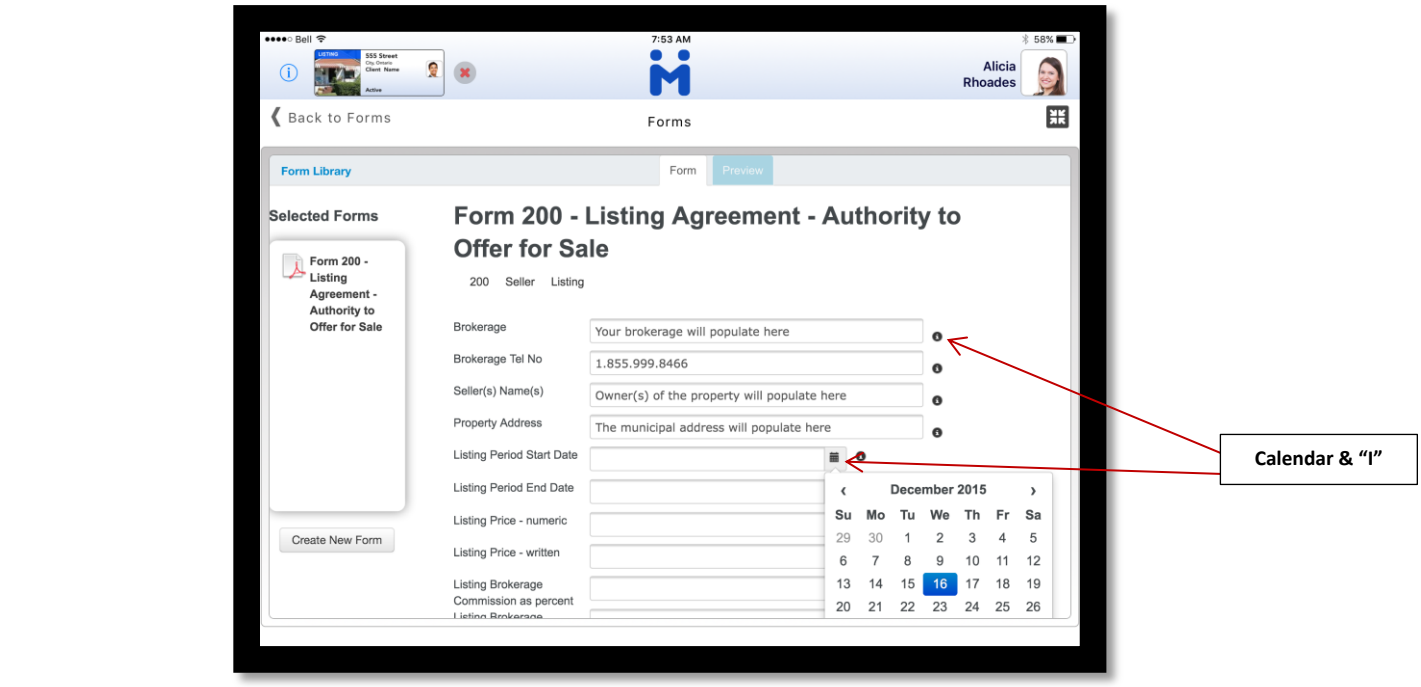
The **Form** wills auto populate with your profile information (taken from the **"About Me"** section), property listing's information (taken from the **"Engagement"** section) as well as relevant fields from the Electronic Land Registry System. This will allow you to quickly complete the form to share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



To deselect any form choose the '**X'** to the right of the form name.

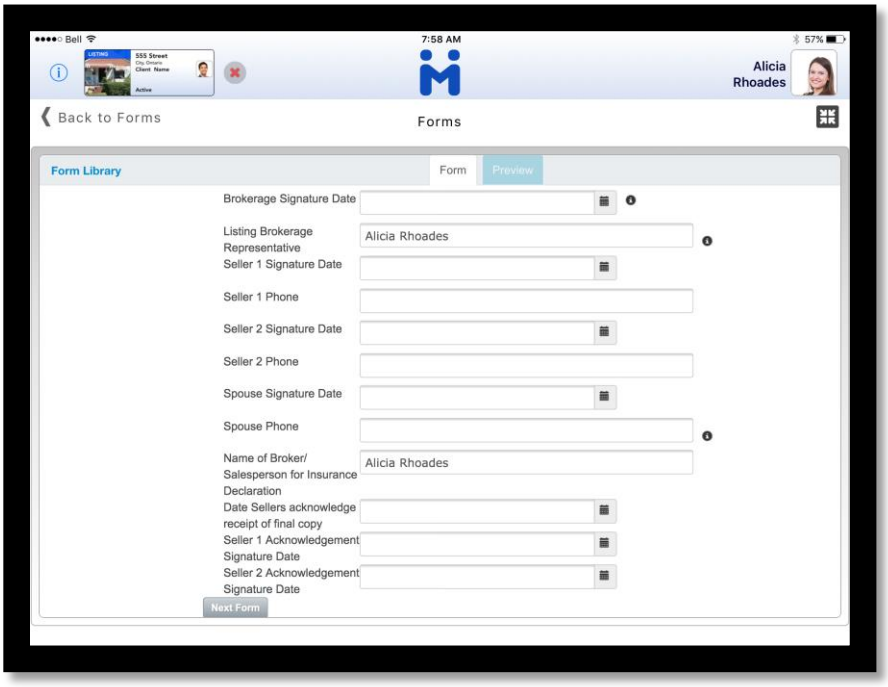


6. To complete the form, simply select the input fields and enter the information.

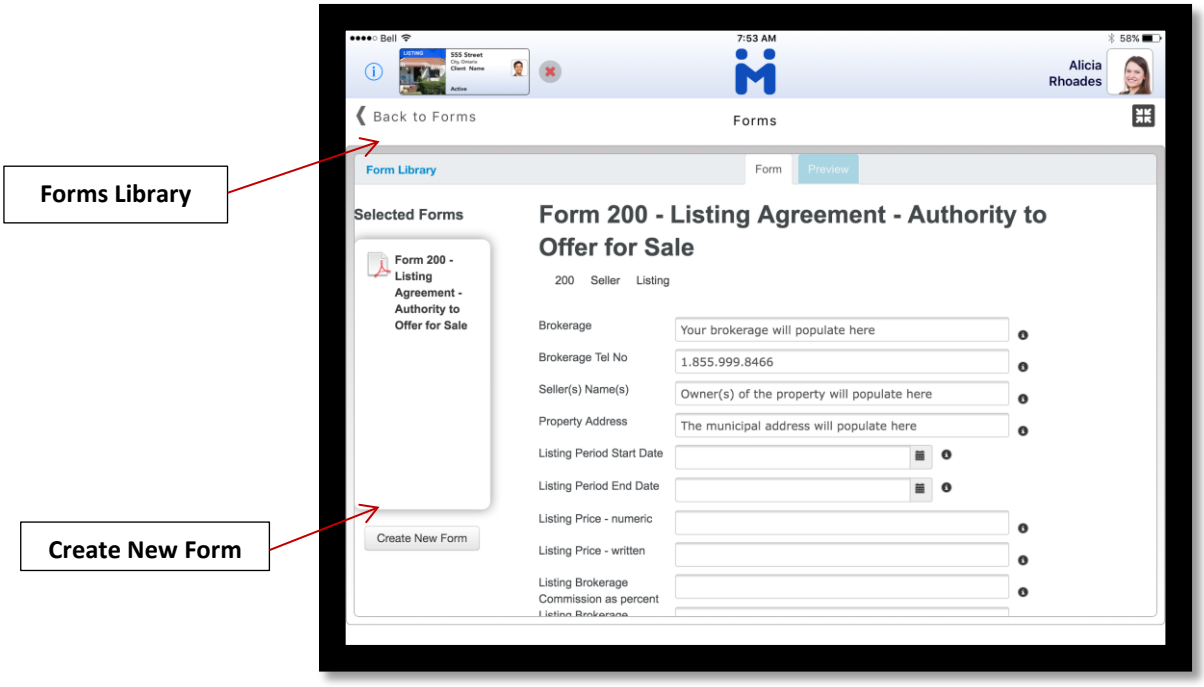


To the right of the input boxes you will find a calendar where a date is required and an 'i' that will open with additional tips on how to complete the field.

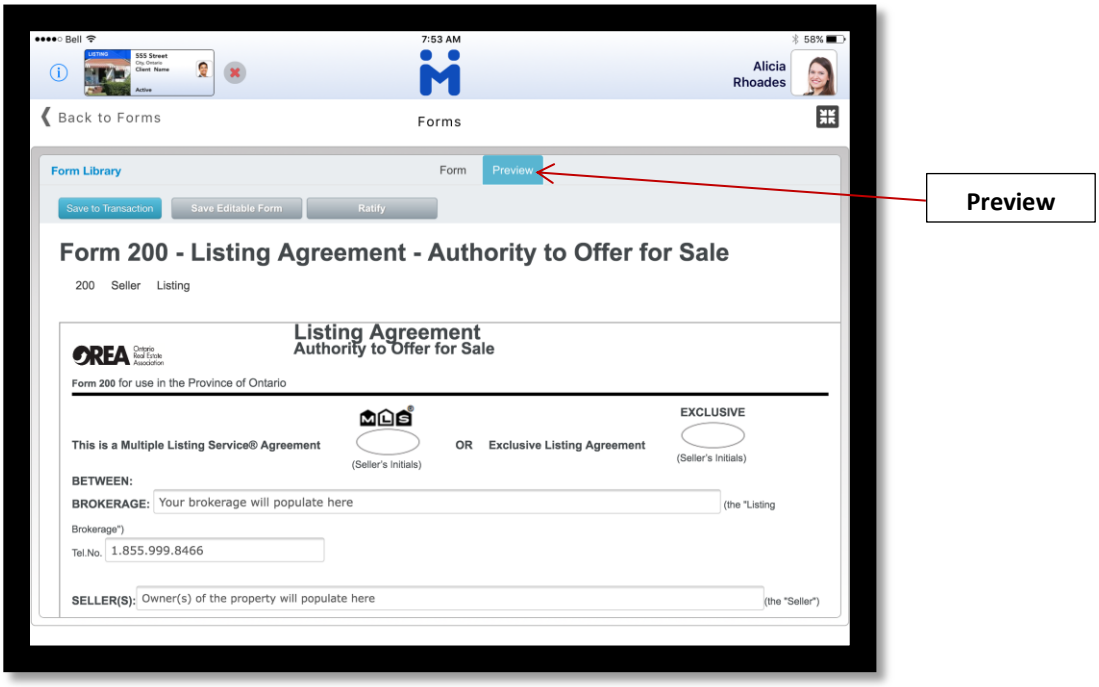
7. If you have more than one form selected you can move on to "**Next Form"** or "**Previous Form"** at the bottom of the page.



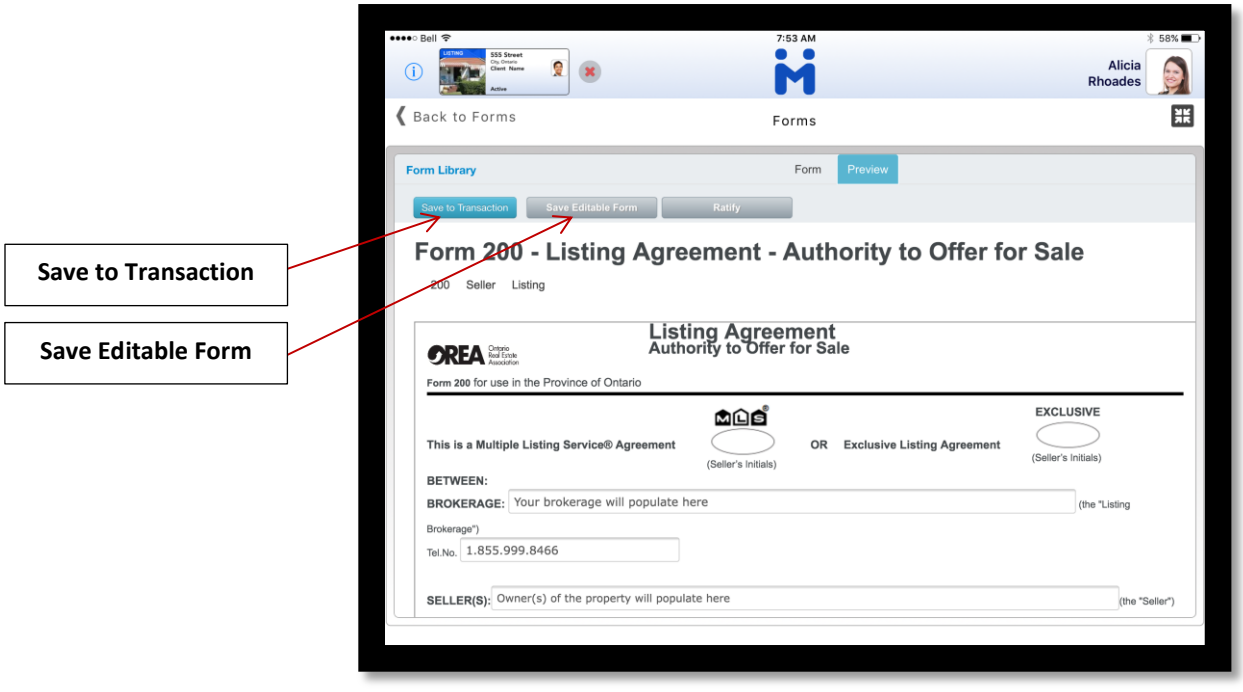
8. To return to the **"Forms Library"**, you can click on the "**Create New Form"** button located at the top of the page underneath "**Selected Forms** or select the **"Form Library"** link on the left of the "**Forms"** header.



9. 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”.**



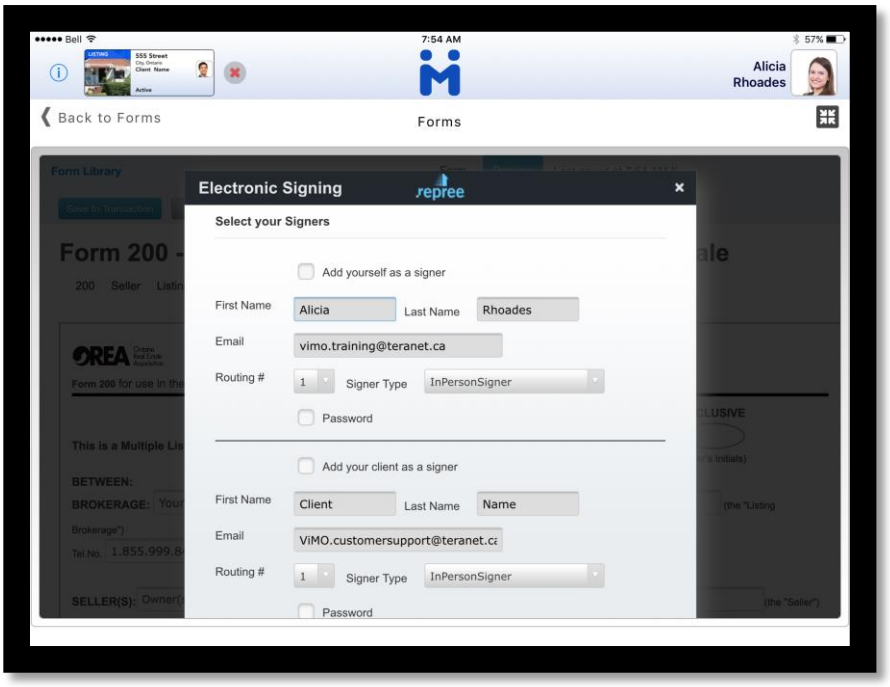
- **"Saving to Transaction"** saves your form in a completed non-editable version. This is generally used when your form is ready to go. A copy of the PDF is available in the "**Completed"** tab from the "**Forms"** menu.

- **"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 **repree™***, an electronic signing system. Here you will see all the necessary options to complete the electronic signing of your form.

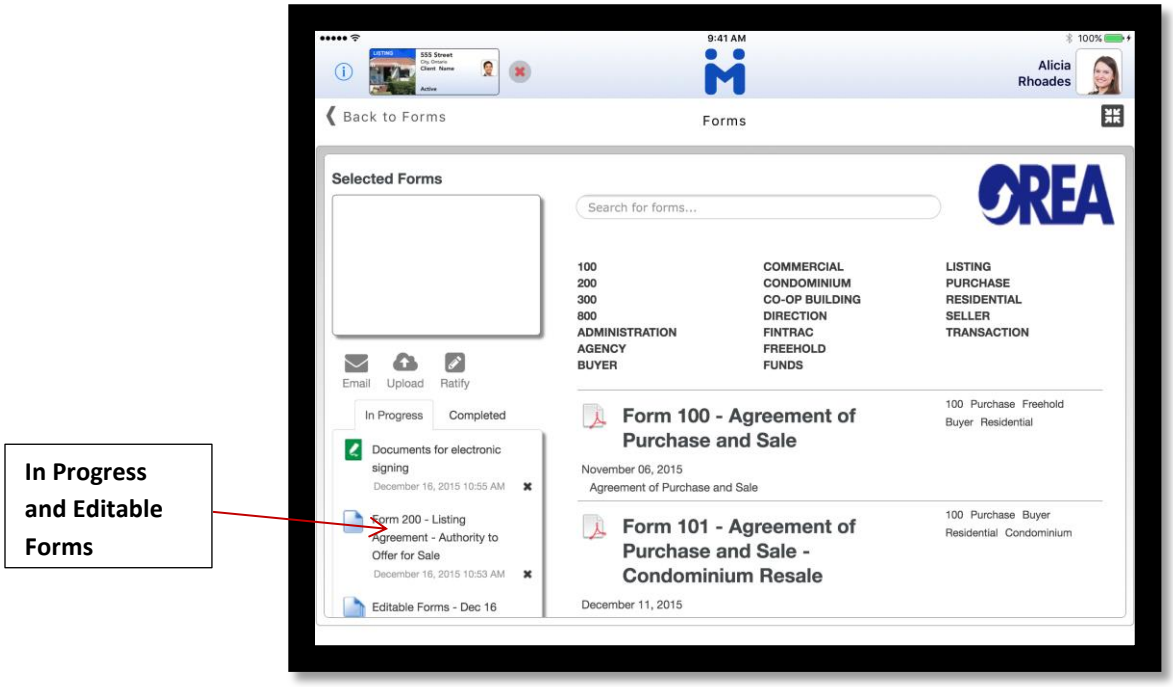


***Forms** created in ViMO are managed by a third party company**, repree™**. An account for **repree™** is automatically created with your ViMO account and no action is required.*

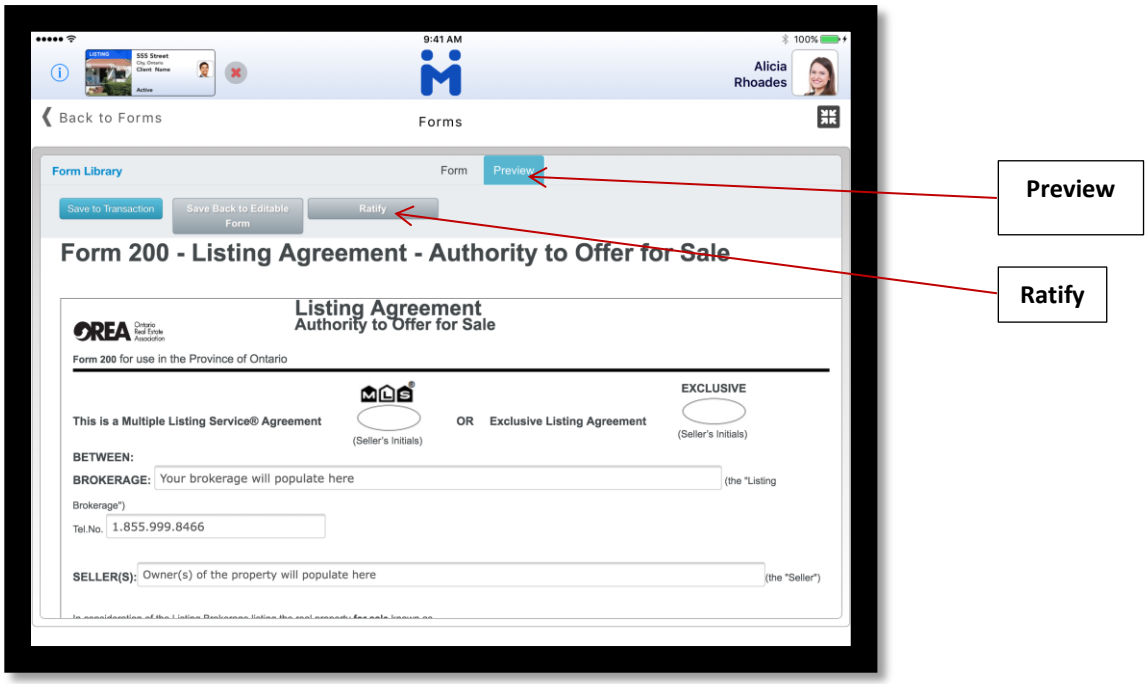
For more information about repree™ please visit their website at www.repree.com.

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

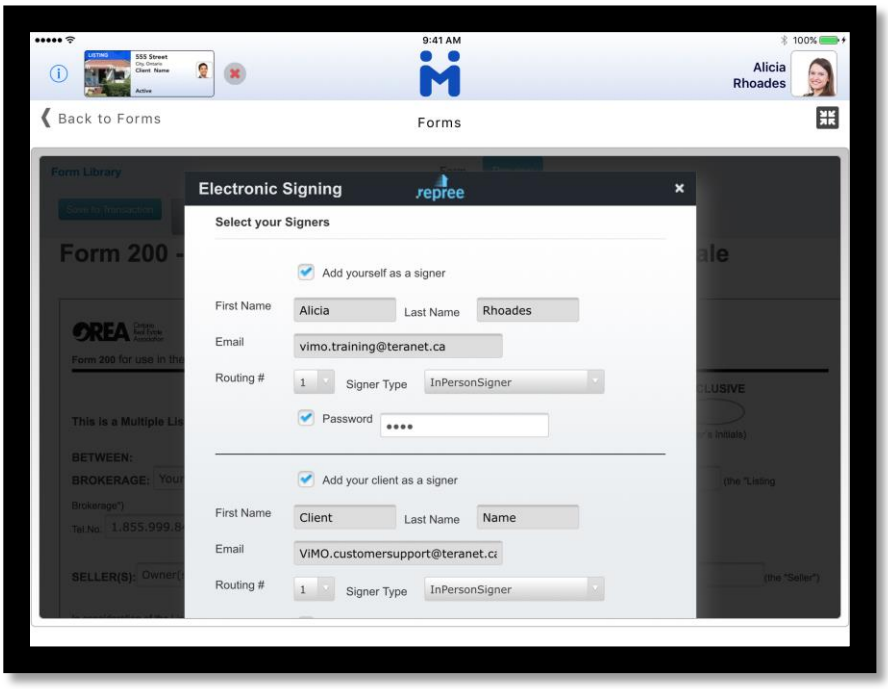
1. Expand the "**Forms**" section, select the "**In Progress**" tab and then "**Editable Forms**"



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

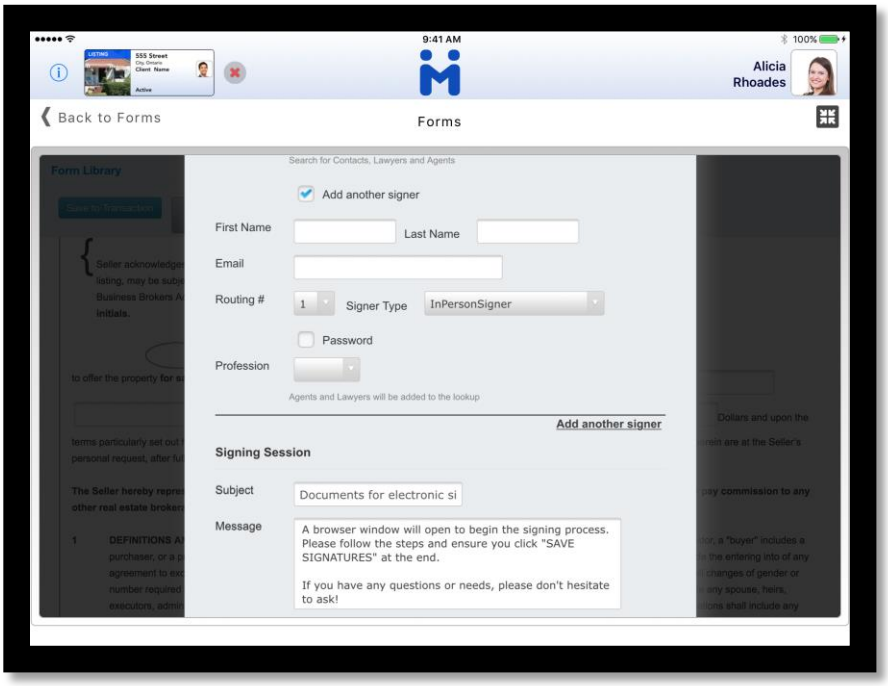


3. The repree™ electronic signing window will open



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



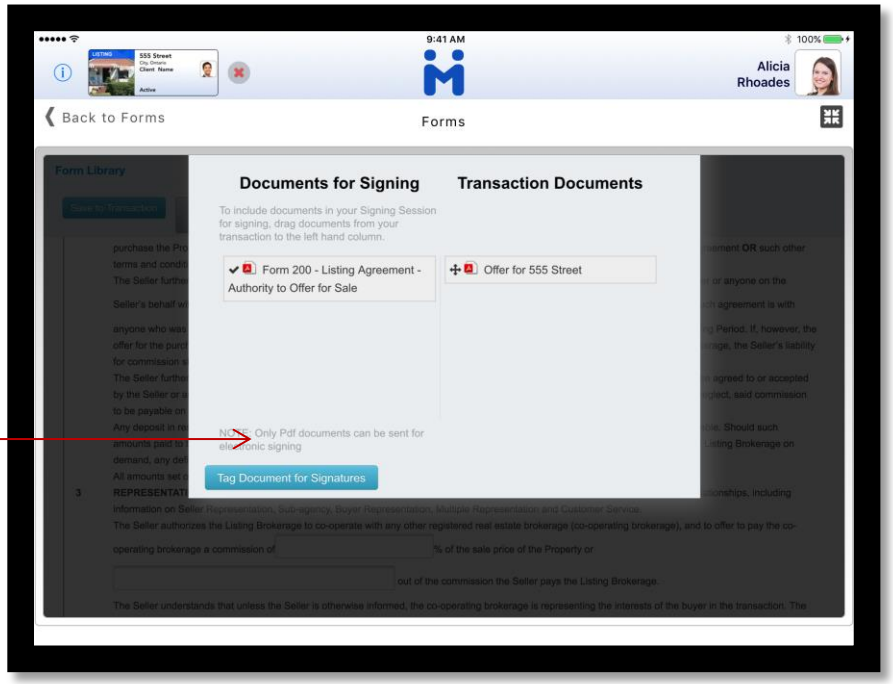
c. You can “Add another signer” if there is a third party to sign the document who is not listed as a client for the Engagement: Select “Add another signer” and enter their “First Name”, “Last Name”, and “Email”

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. 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 33 of this guide.

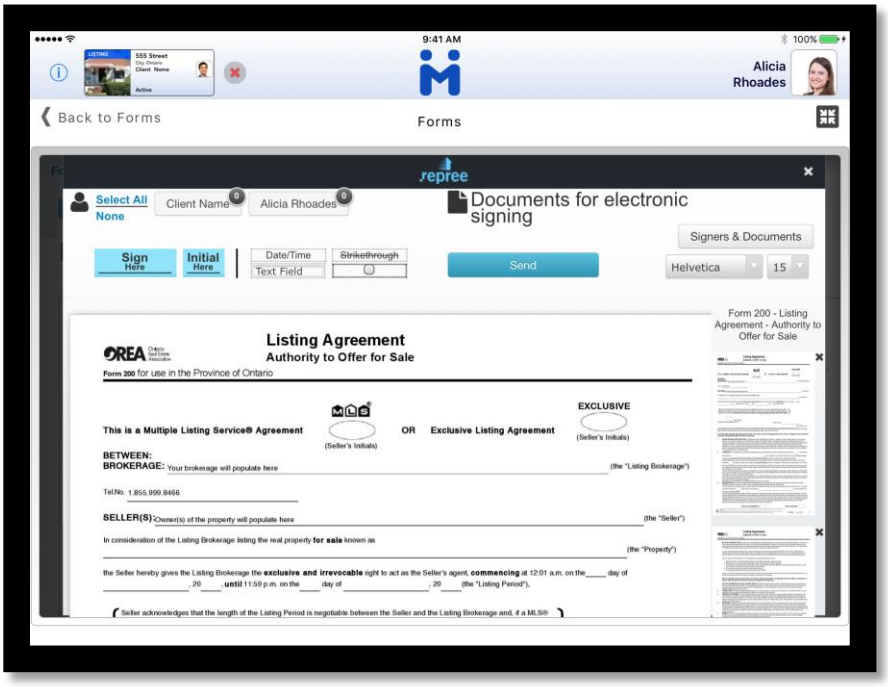
4. Scroll down the window and select the form you would like to sign under **“Transaction Documents”** and drag it to the left side of the window under **“Documents for Signing”**



Tag Document for Signatures

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

6. 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** deselect them.

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

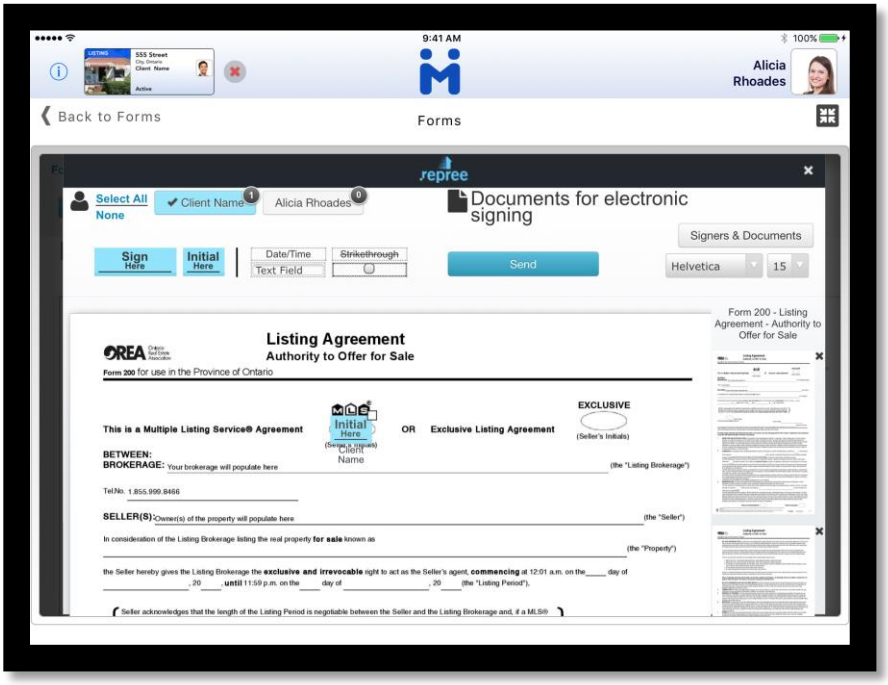
The tag options are Sign Here, Initial Here, Date/Time, Text Field, Strikethrough, and Checkbox

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.

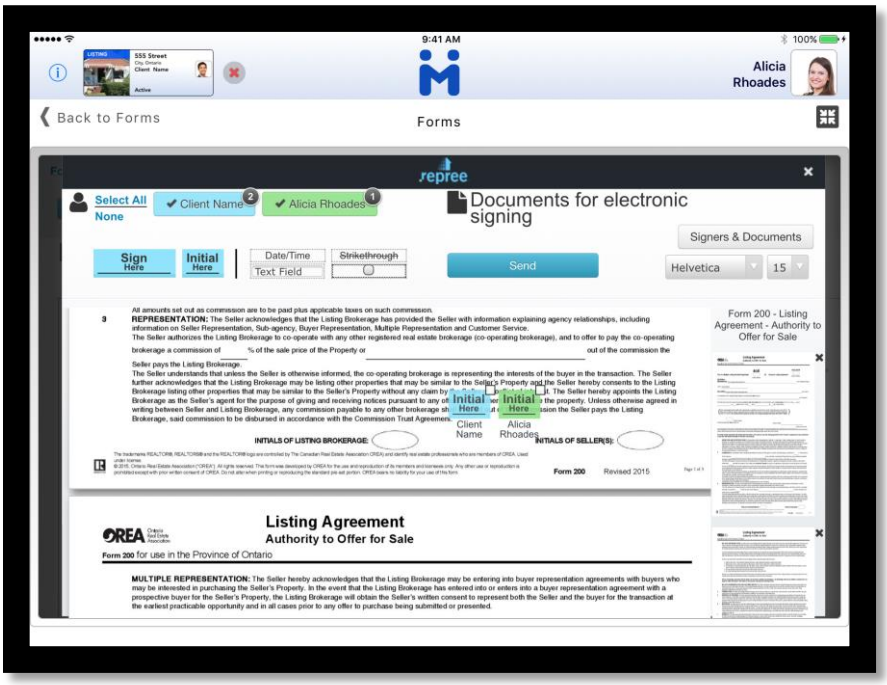
Please note – the default font is Helvetica and the default font size is 15 pt. If you choose a different font type or size it will change for the current form only and will be reset to the default for any subsequent forms. The Edit Session button will return you to the repree™ electronic signing window where you select the signers.

7. **Tagging a form**

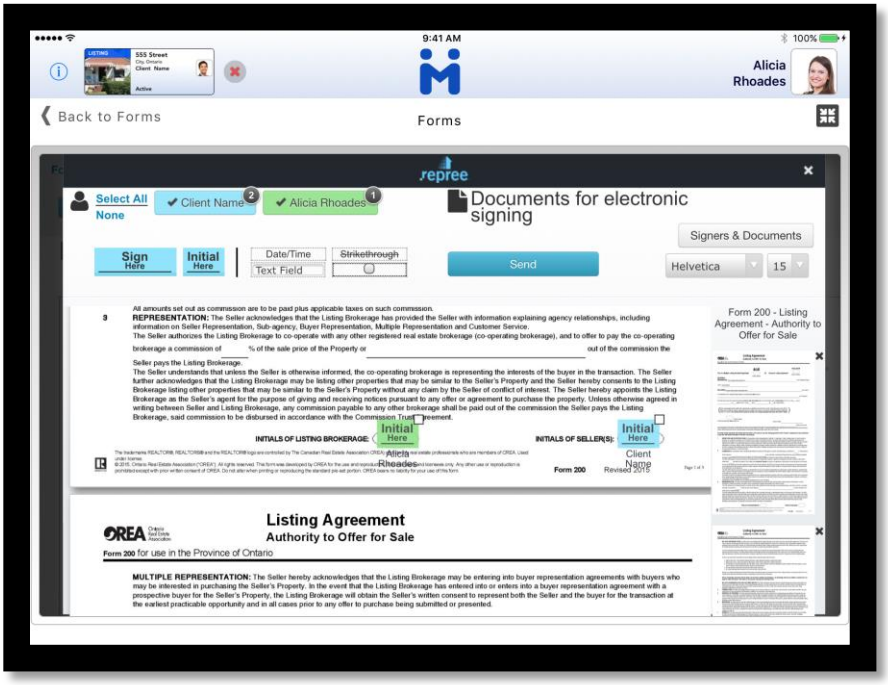
a) To start tagging select the party, the tag option and drag it to the area of the form.



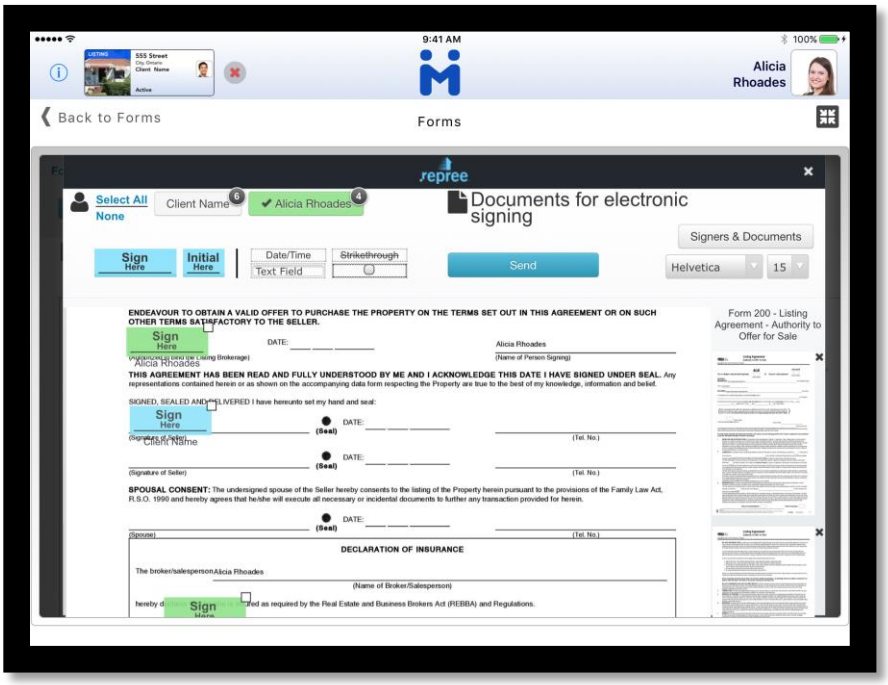
b) You can choose multiple parties and drag a tag option for each to the form.
Note – each party will be assigned a different colour.



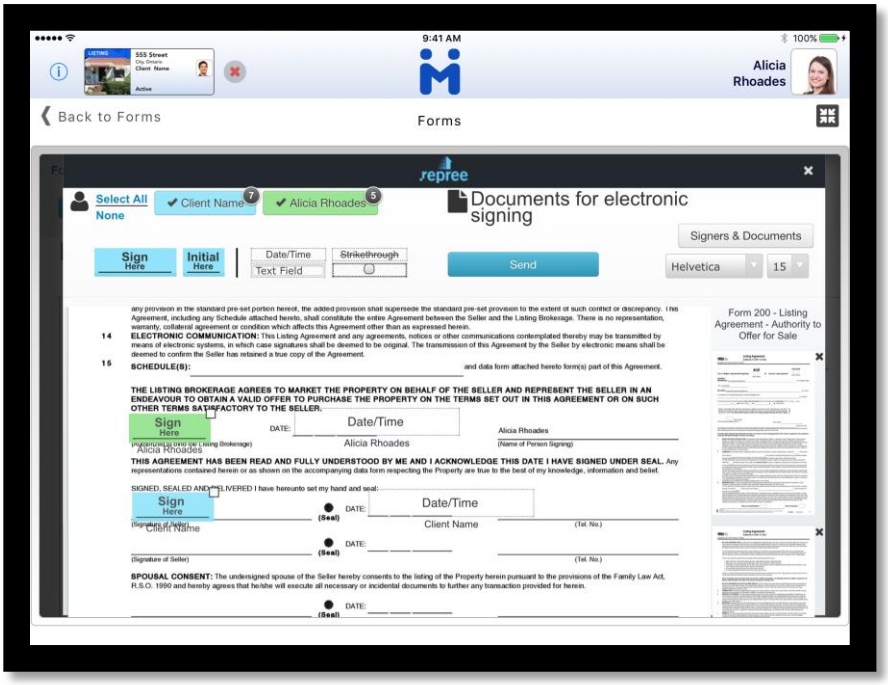
c) The tags can be separated and dragged to the area of the form for each party.



d) Continue reviewing the document and tag signatures

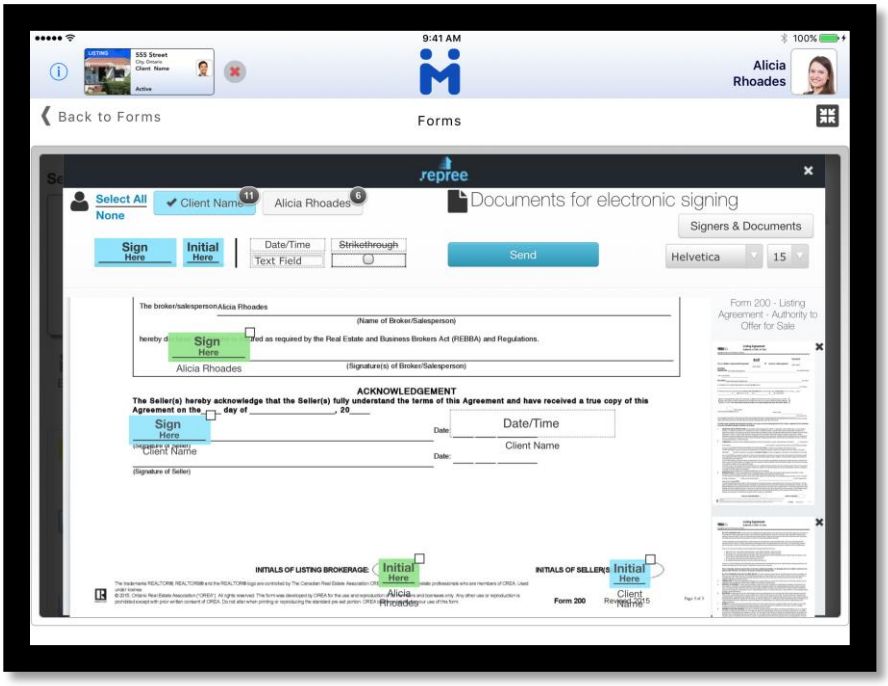


e) Tag Date/Time stamps



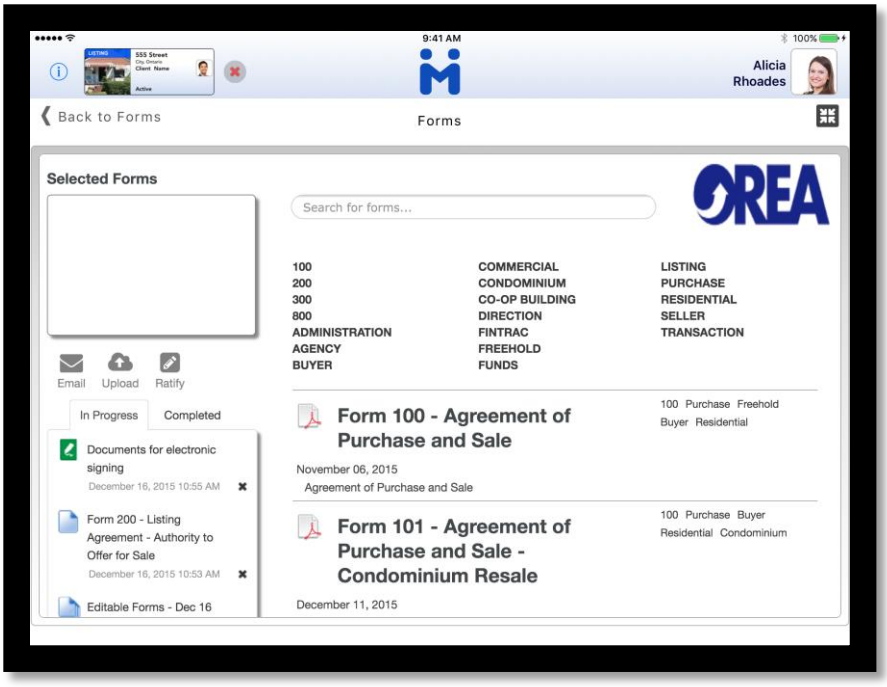
f) Insert Text and a Checkbox (not shown)

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

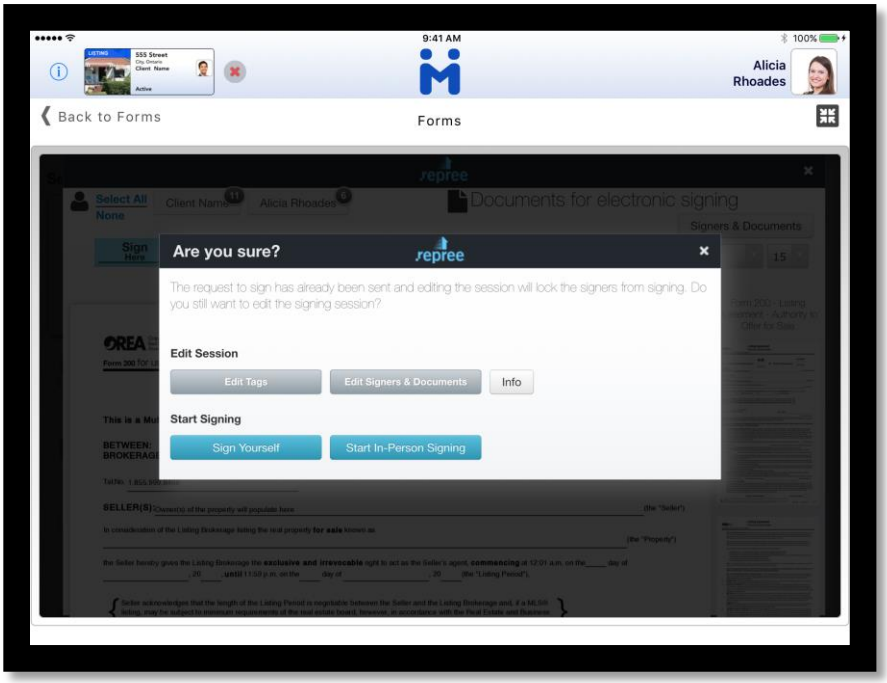


8. **In-Person Signing**

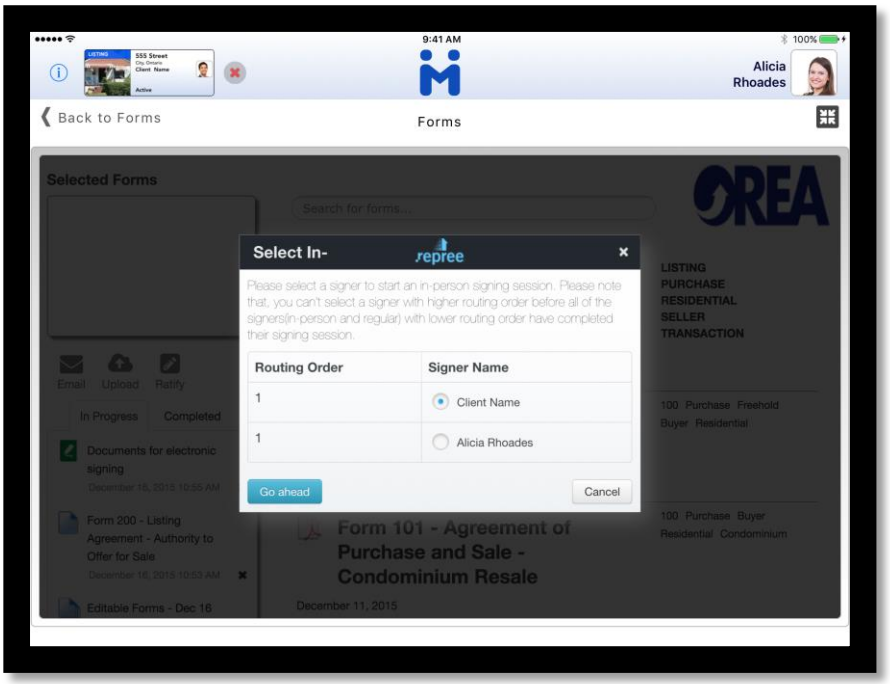
a) You will be returned to the "Forms" menu. To start signing, select **"Documents for electronic signing"** from the **In Progress** section



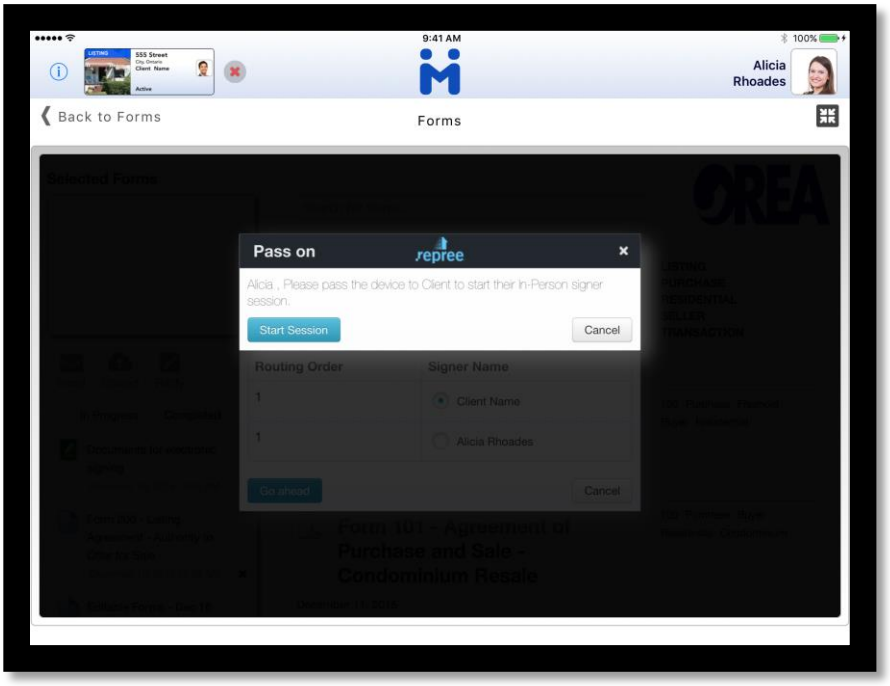
b) A confirmation window will be presented, select **“Start In-Person Signing Session”**



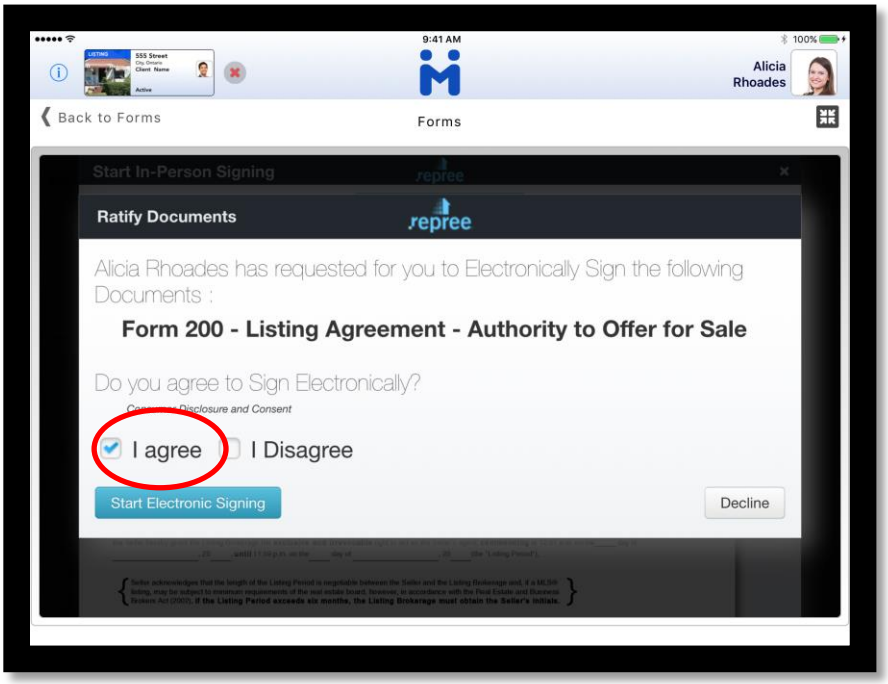
c) A window will open where you select the Signer Name by placing a bullet beside it and then select **“Go ahead”**



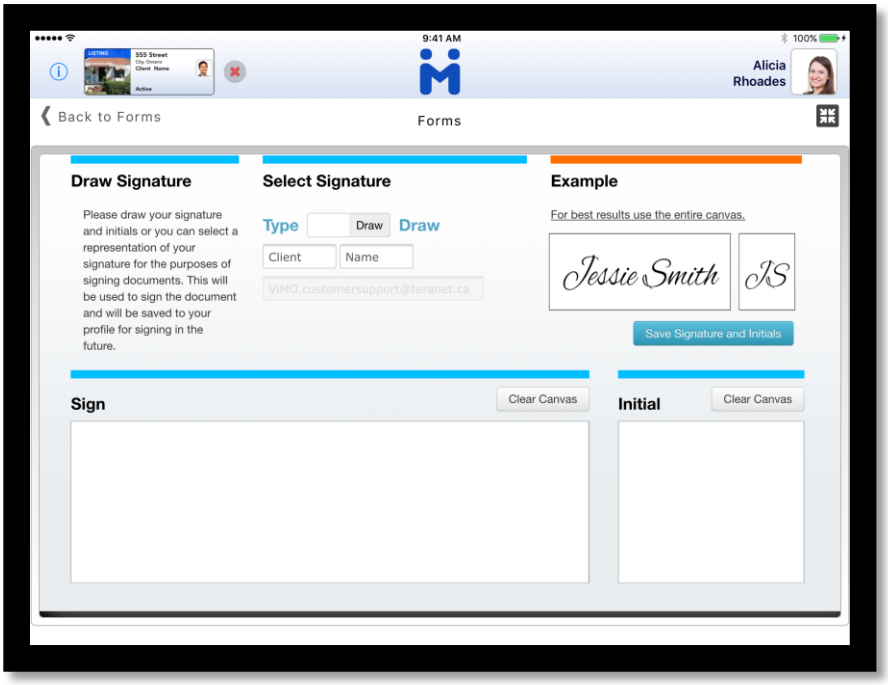
d) The “Pass on” message will instruct you to pass the devise to the client to start their In-Person signer session. Instruct your client to select **“Start Session”.**



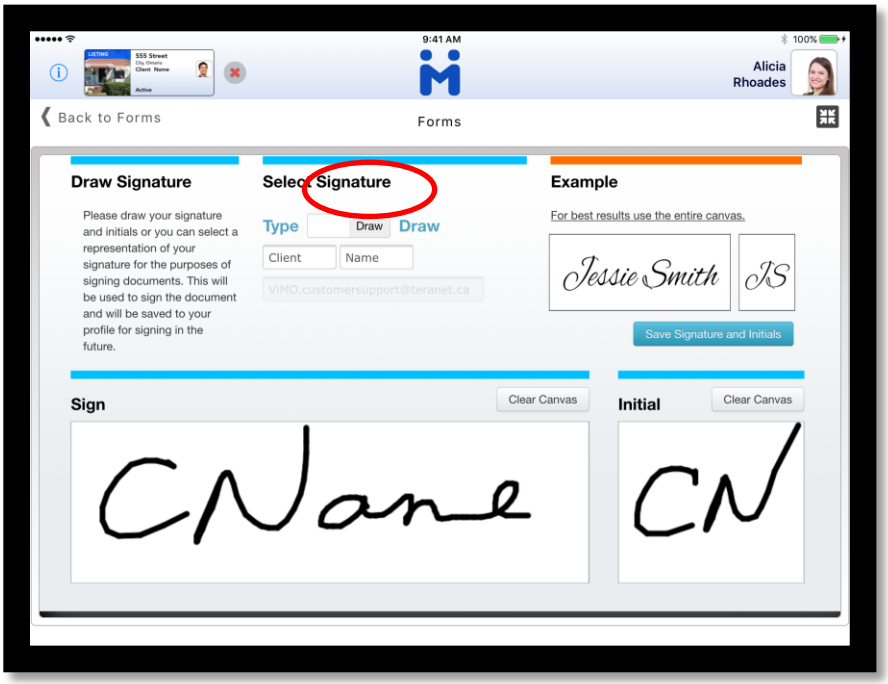
e) A window will appear that will ask your client to agree to Sign Electronically. Select **“I agree”** then **“Start Electronic Signing”**.



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

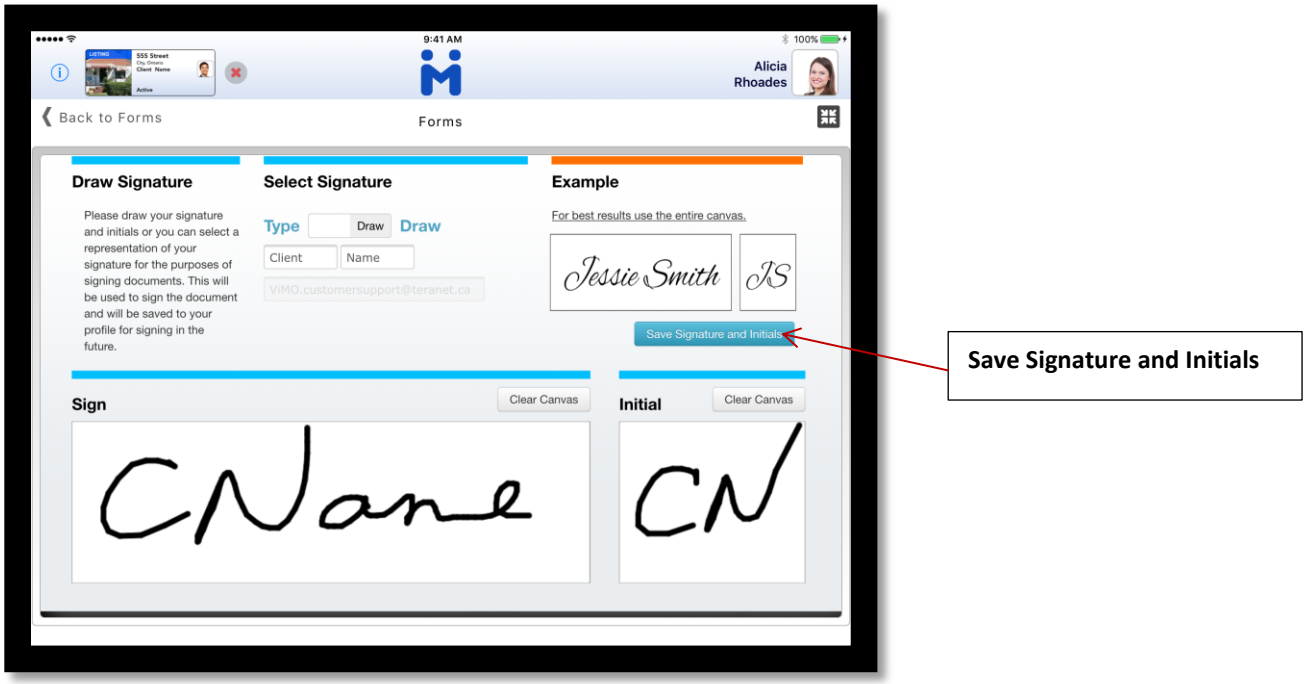


i. If you select **“Draw”** under **“Select-a-Signature”** then you can draw your Signature and Initial with your finger or stylus pen. **“Clear Canvas”** will remove your drawn signature and initial if you are not satisfied the first time and you can try again.

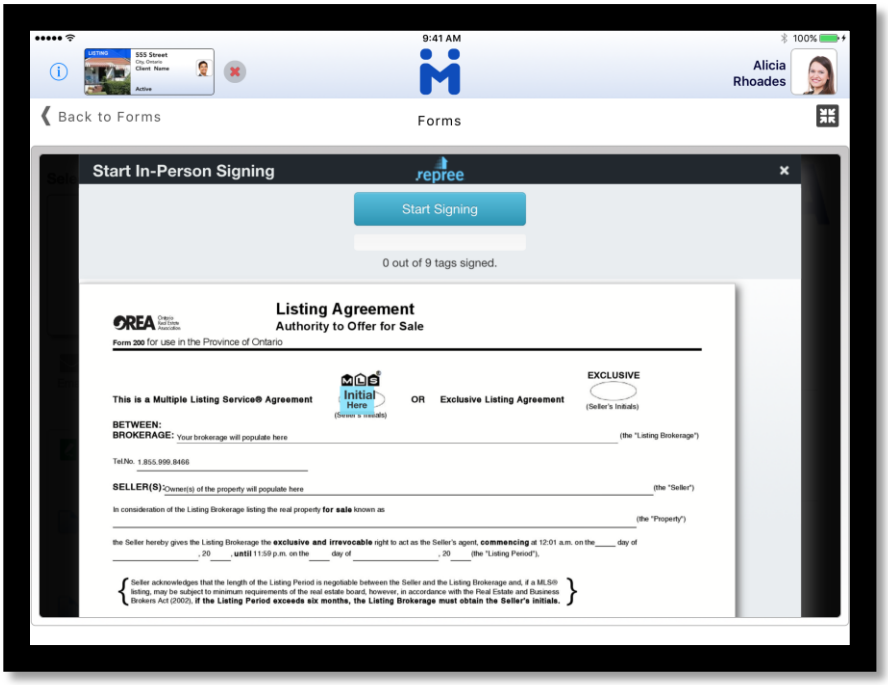


ii. If you select **“Type”** under **“Select-a-Signature”** then you can select a signature from Classic, Cursive, Modern, Script and Printed.

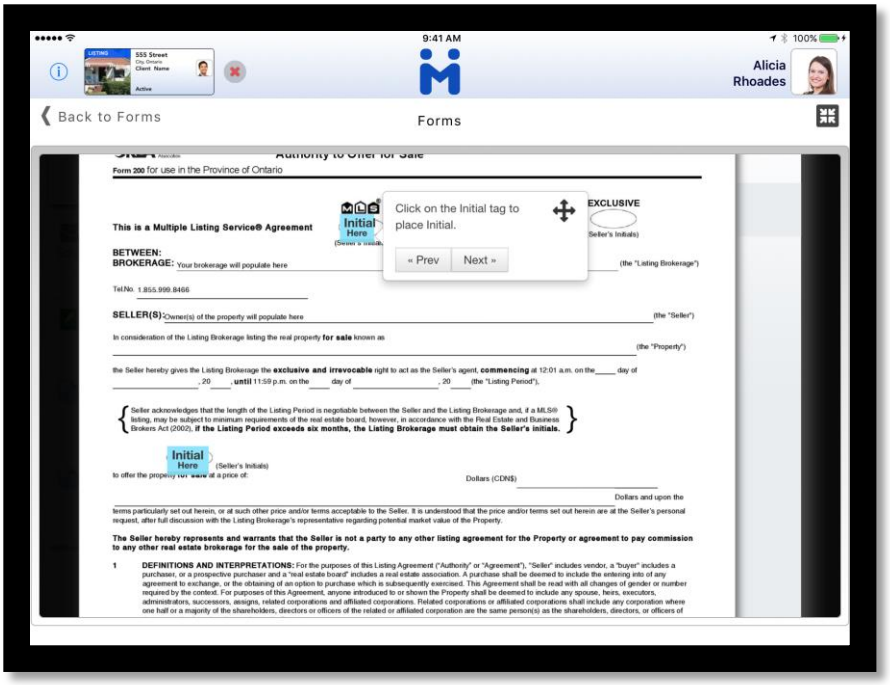
g) Once you are satisfied with your ‘Signature’ and ‘Initial’ select **“Save Signature and Initials”**



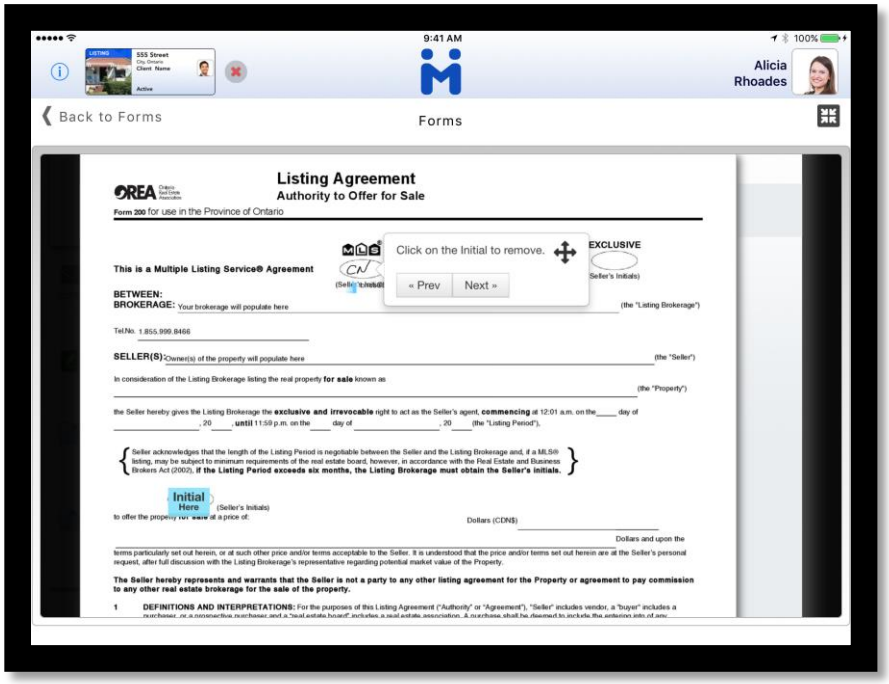
h) The form will display on the screen and you select **“Start Signing”**



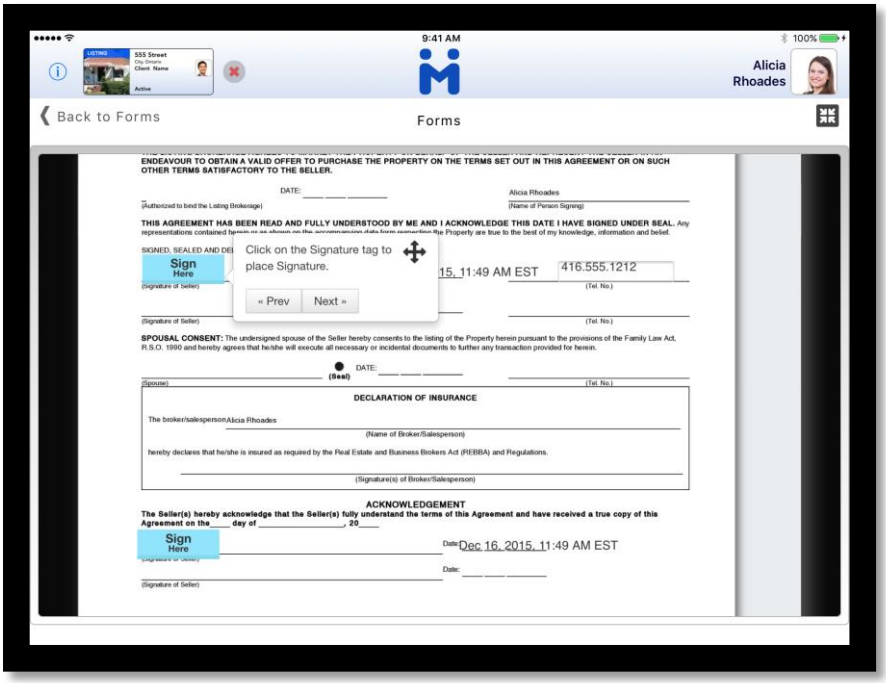
i) You will be directed to the first tag and a window will open with instructions. To Initial a **“Click on the Initial button to place Initial”** message will appear. Select **“Initial Here”.**



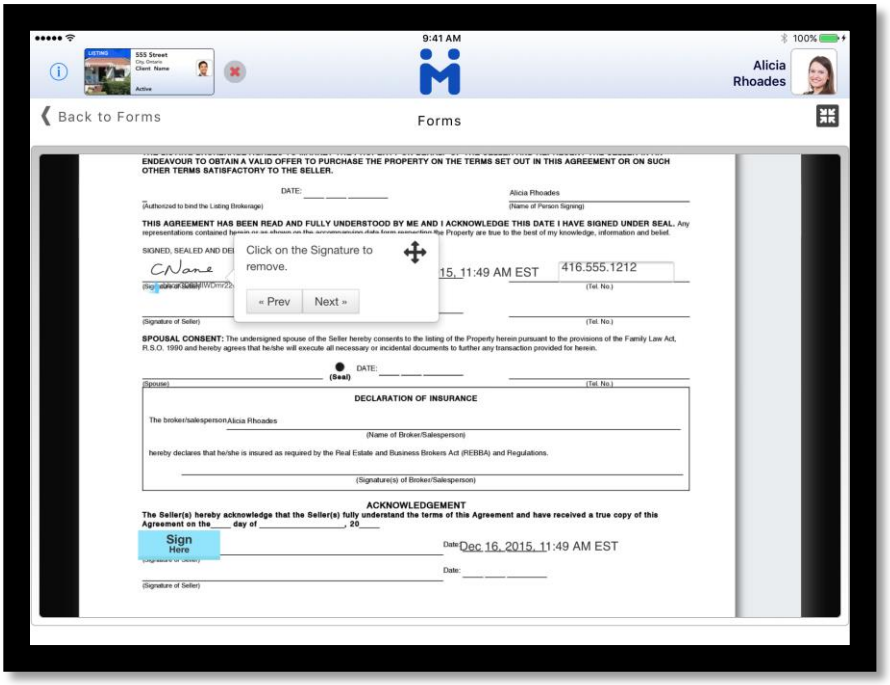
j) Your initials will replace the tag and a window will appear to direct you to the **Prev** (previous) or **Next** tag. You can also **"Click on the initials to remove"**. Select **"Next"**



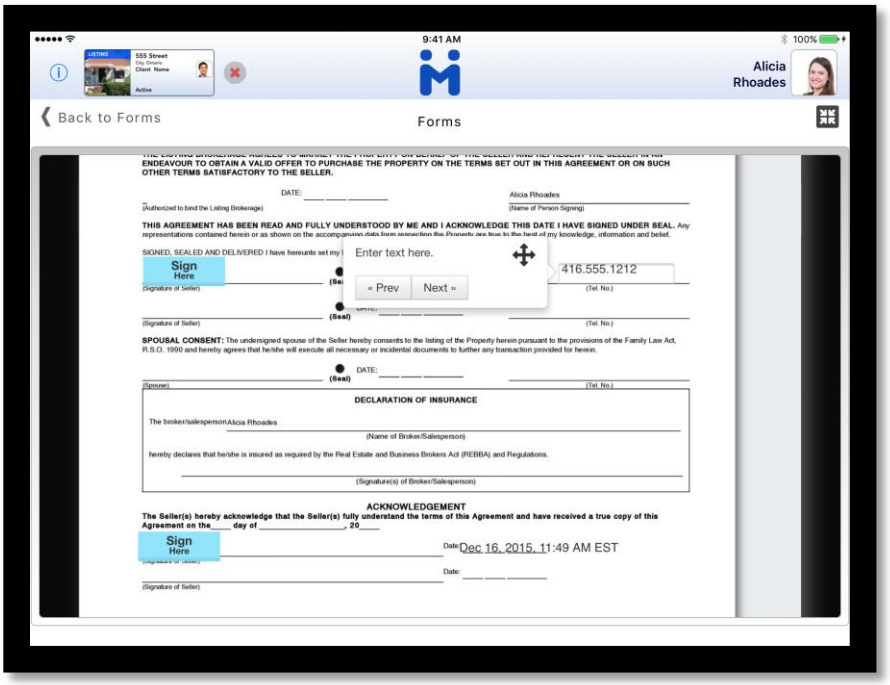
k) For a Signature, a **"Click on the Signature button to place Signature"** message will appear. Select **"Sign Here".**



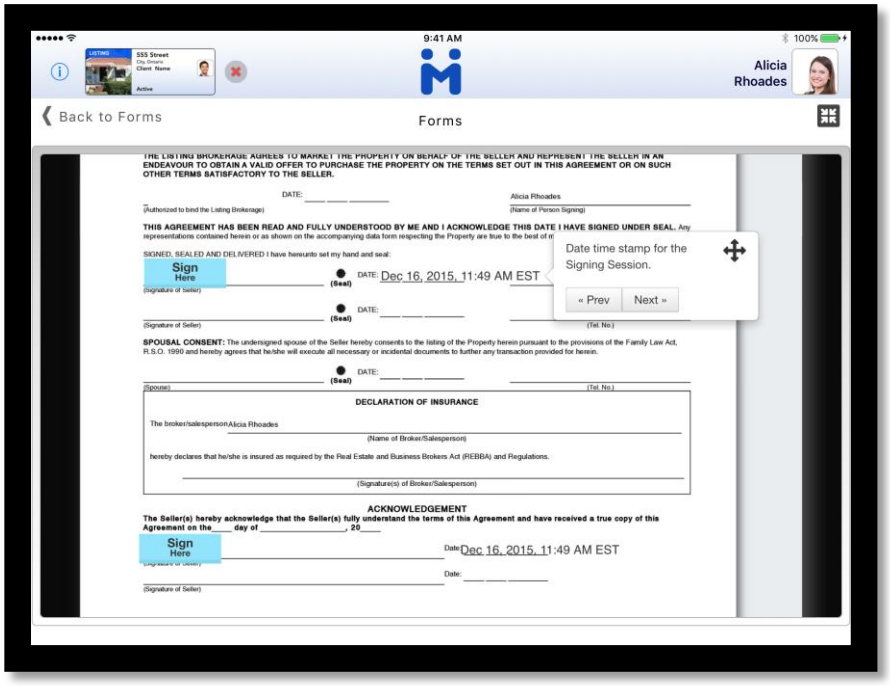
l) The signature will replace the tag, to continue select **“Next”**



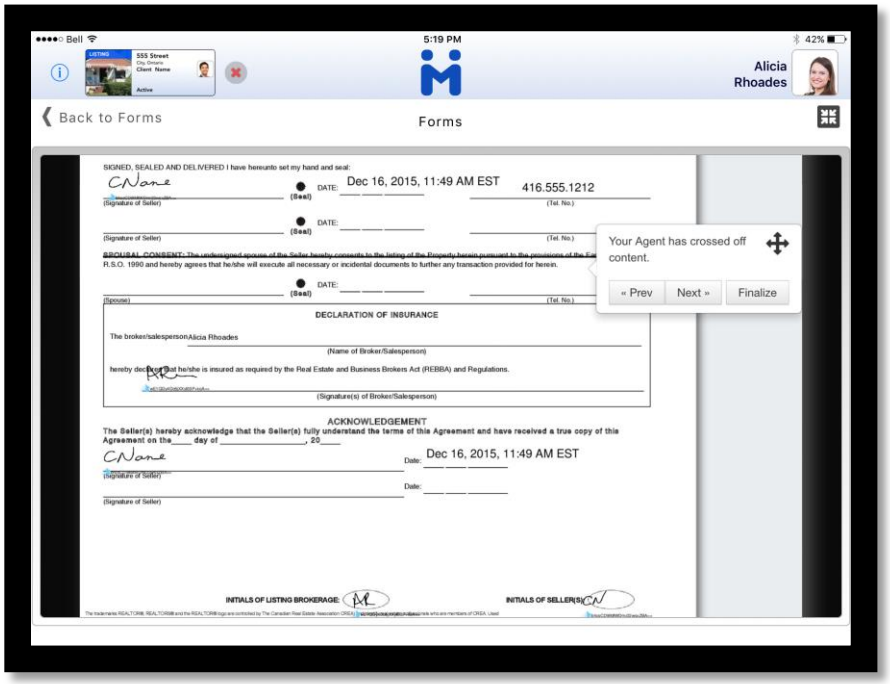
m) If you added a text tag, a message will appear to **“Enter text here”.** Select **“Next”**.



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

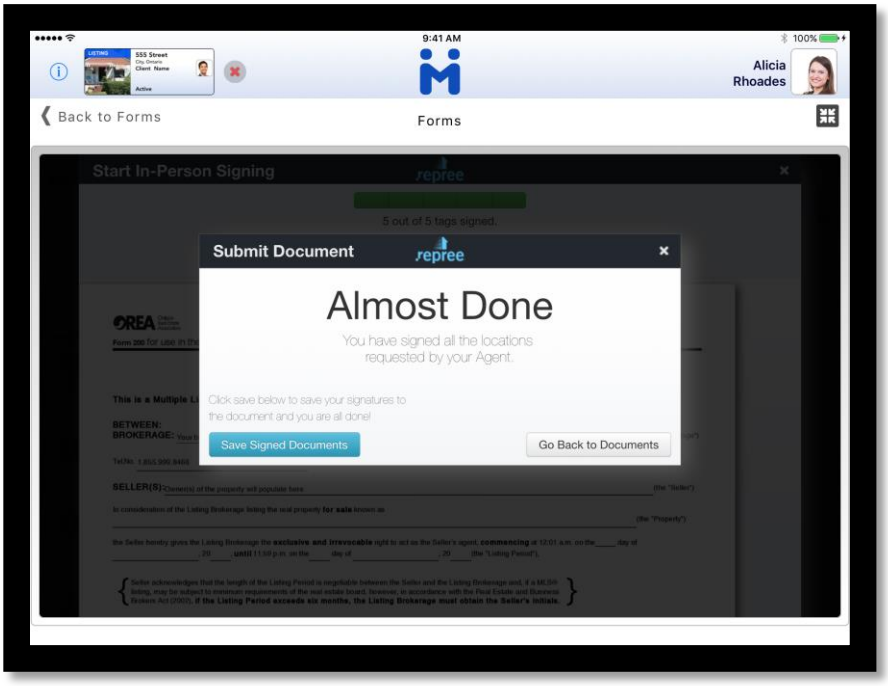


o) If you added a **Strikethrough** tag, a message will appear to advise **“Your Agent has crossed off content”**. Select **“Next”**

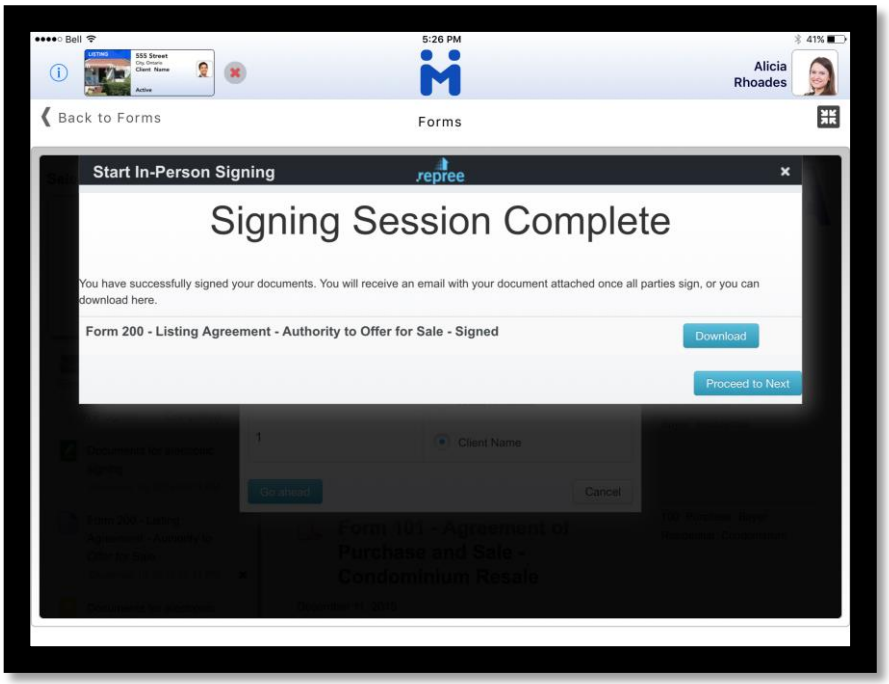


p) Once you have reviewed and approved all tags select **“Finalize”**

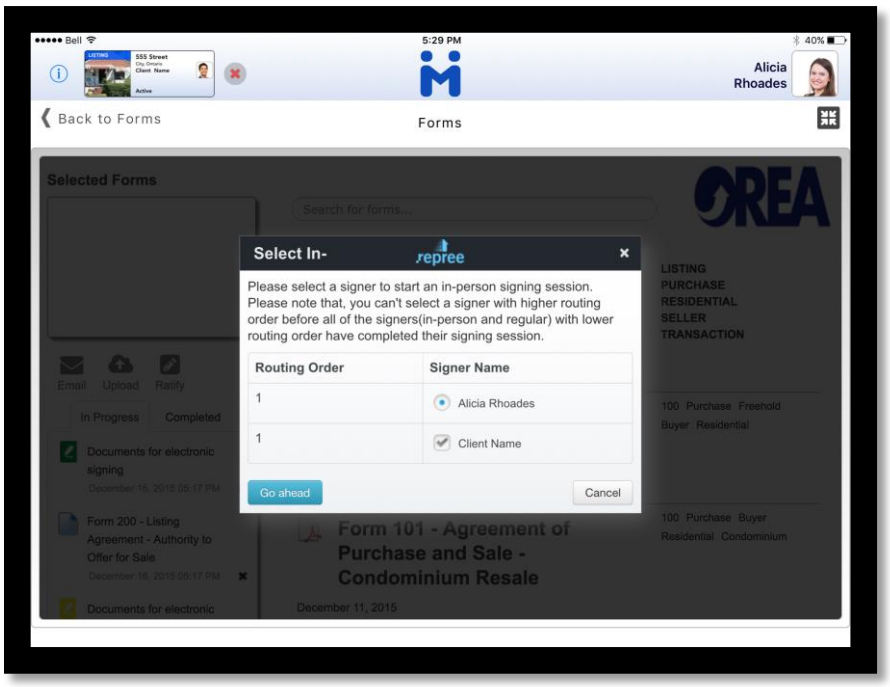
q) A window will appear to confirm you have signed all locations requested; select **“Save Signed Document”** if done; select **“Go Back to Documents”** to review again.



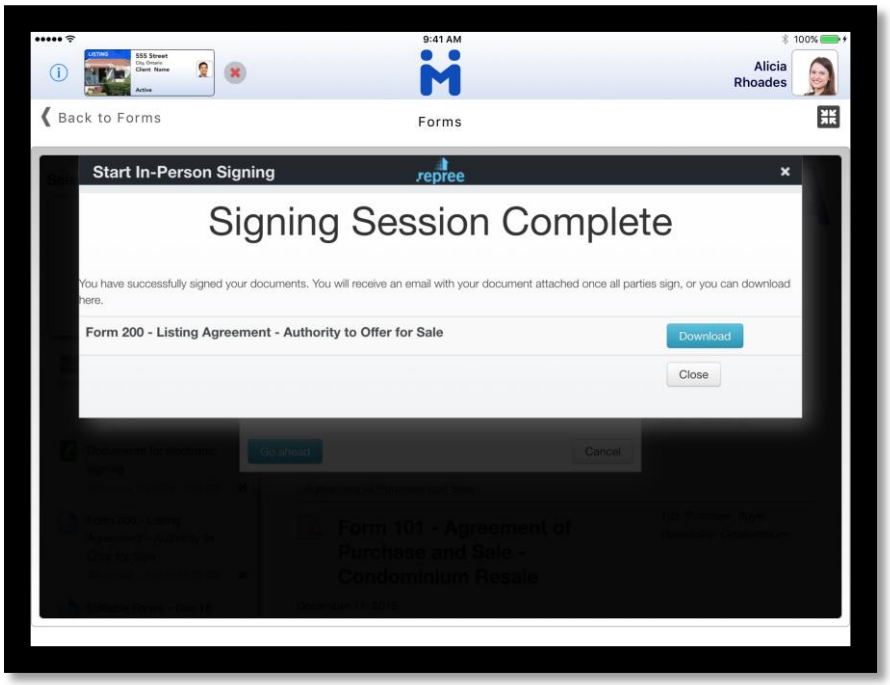
r) A confirmation window will appear and you select **“Proceed to Next”**



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

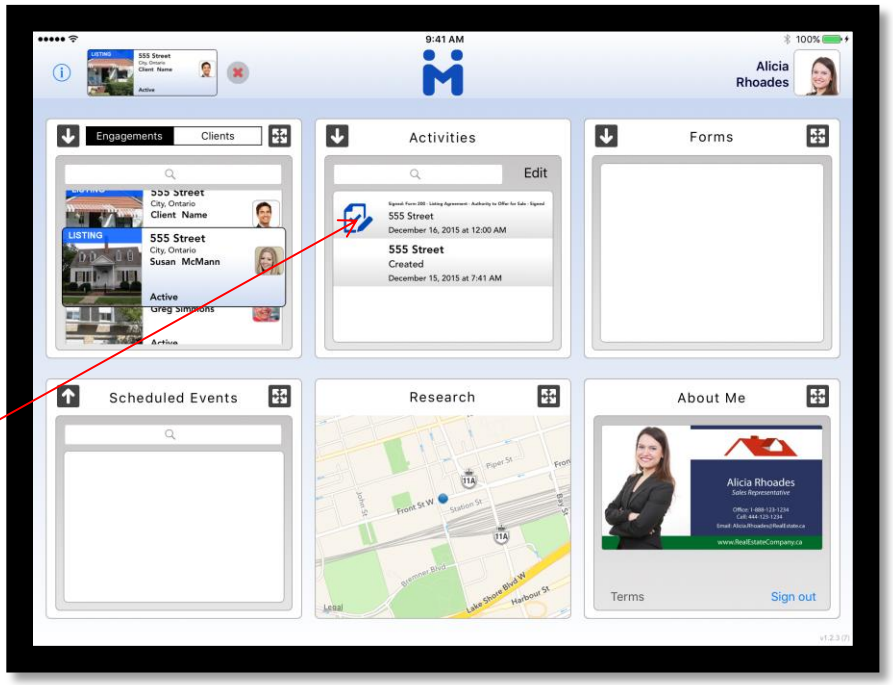


t) Repeat steps **d to r** above for each person to sign. Once done, a message will be presented to confirm completion of the session, select **“Close”**



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

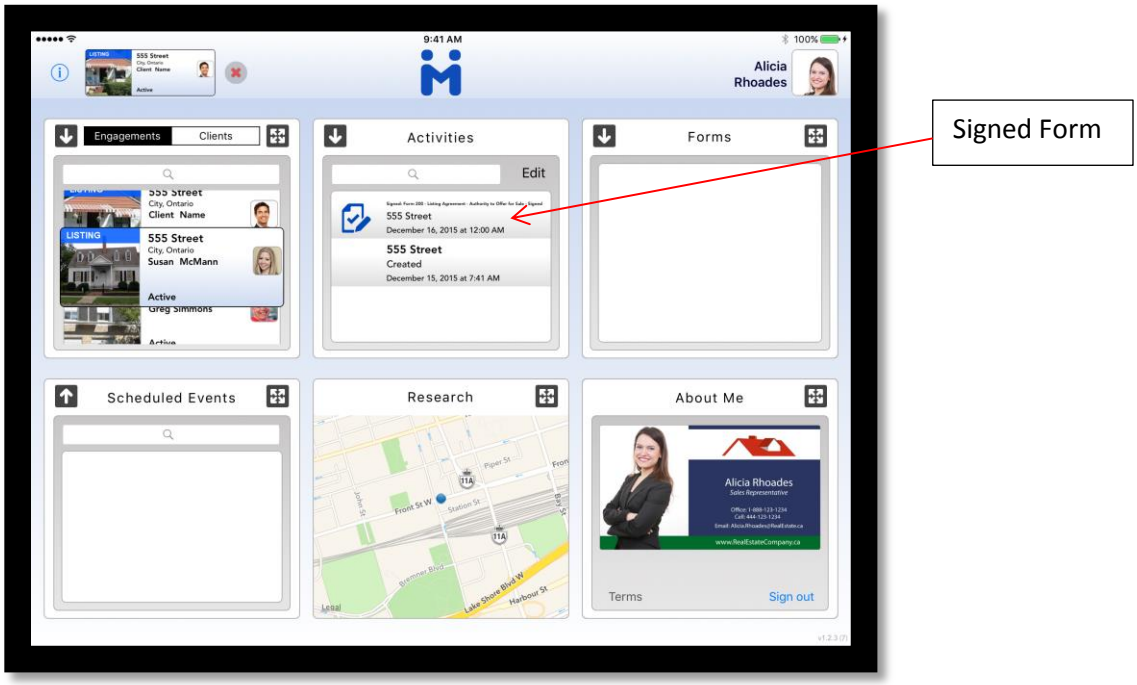
Copy of Signed Document



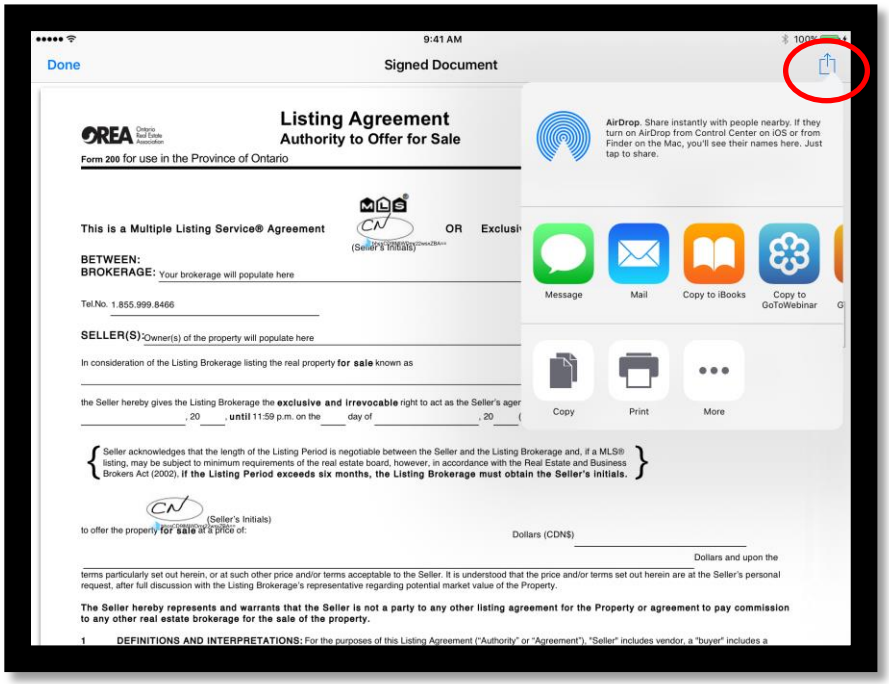
Section 3: Instructions on How to Email, Print or Save forms to cloud storage:

Two options are available to Email, Print or Save signed forms to cloud storage:

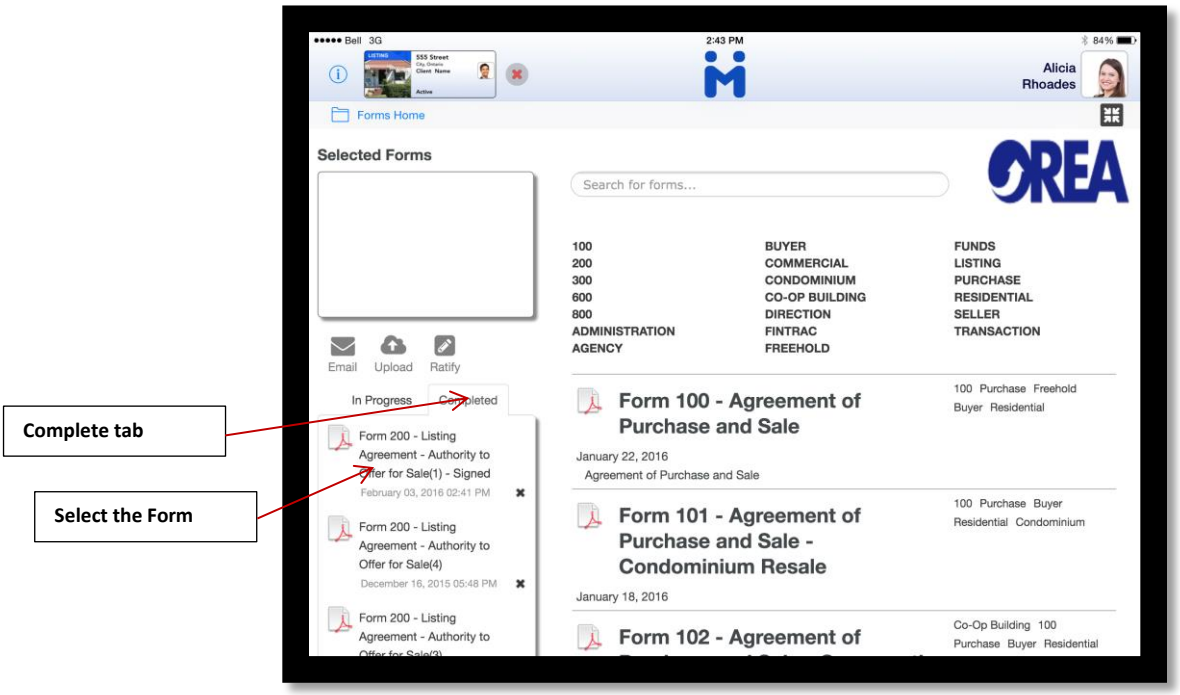
1. Select the signed form in the **Activities** module on the dashboard



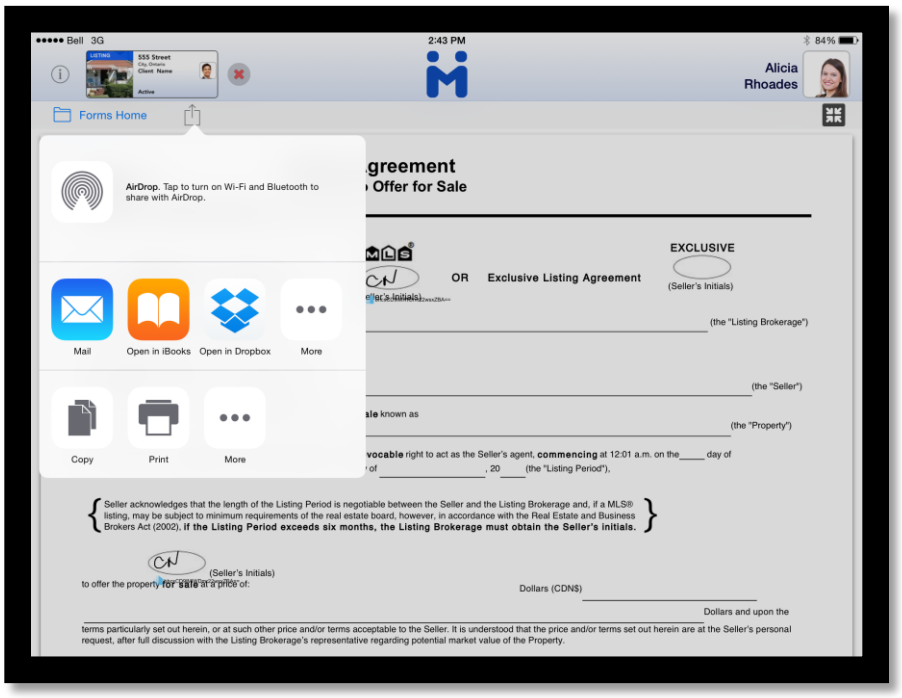
The form to will open and the iPad share feature will appear at the top of the window. Select it and then click on the desired share feature such as Mail, Print, etc.



2. In the **Forms** module a copy of the PDF is available in the "**Completed"** tab



Select the form to open and the iPad share feature will appear at the top of the window. Select it and then the desired share feature such as Mail, Print, Open in..etc.



Note: Unsigned forms in PDF format follow the same steps as above. See the next page for instructions on how to **"Save to Transaction"** to create a PDF.

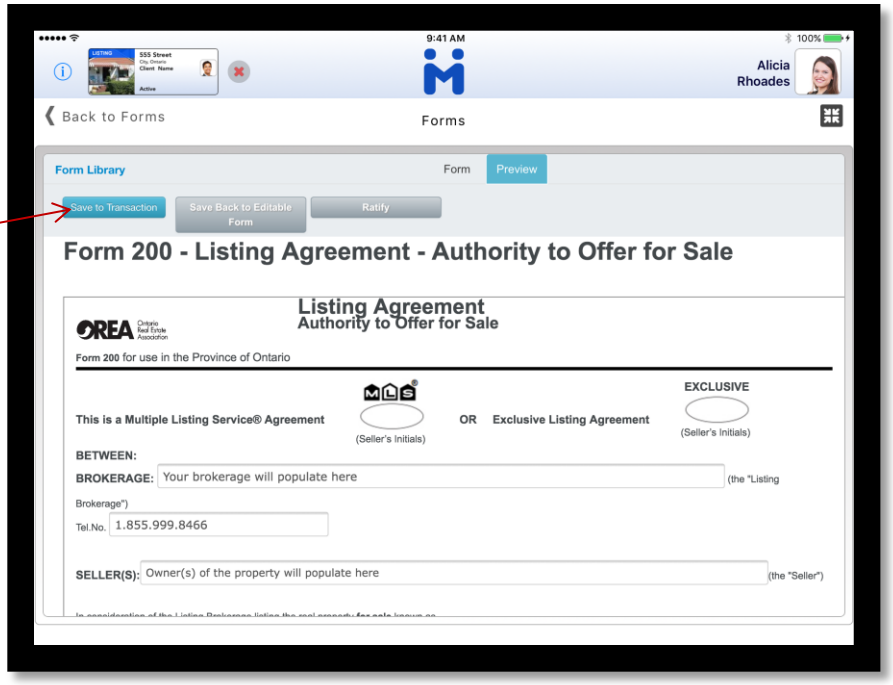
How to Email Forms

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

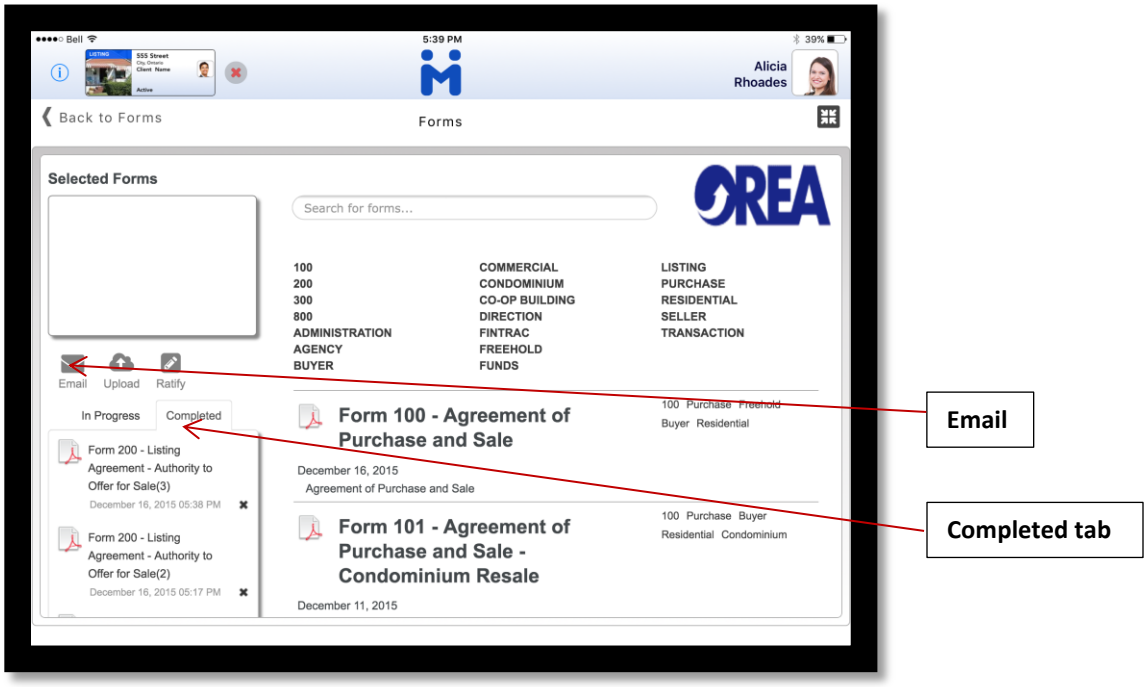
To create a form, follow the steps outlined in Creating and Filling Forms (Section 1).

Once the data entry of the form is complete, review it in the **"Preview"** tab and then select **"Save to Transaction".** This will save a non-editable PDF version.

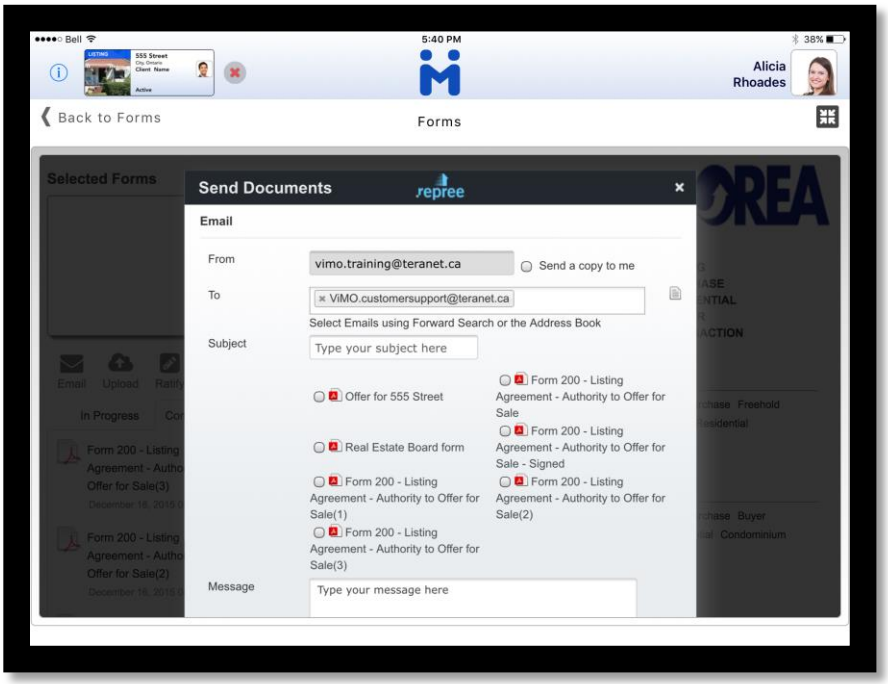
Save to Transaction



A copy of the PDF is available in the "**Completed"** tab from the "**Forms"** menu. You can email the form by selecting the "**Email"** icon



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

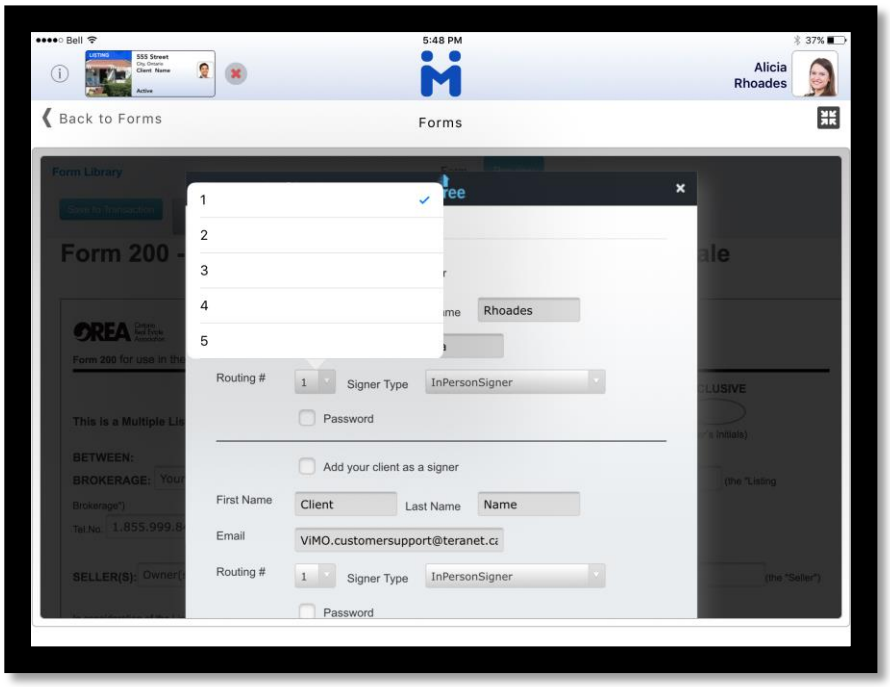


Section 4: *Electronic Signing options:

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.

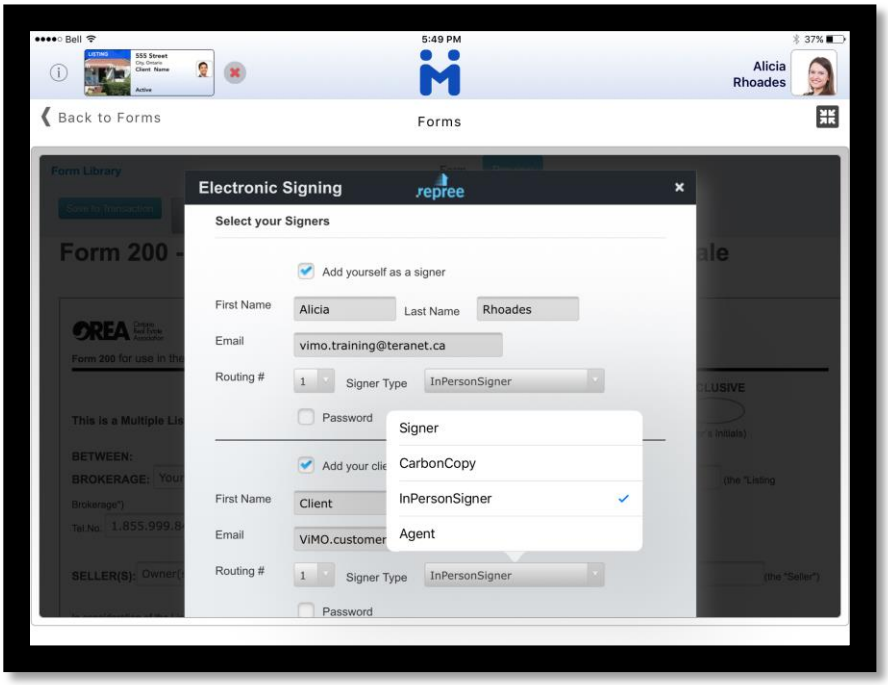
To change the order, select the drop down arrow to the right of the number and choose from numbers 1 to 5 for each signer.



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 20 to 27 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.



Section 5: PDF import option:

ViMO's electronic signature feature offers an "Upload" button that will allow you to import PDF documents from cloud storage systems such as Dropbox, Google Drive and iCloud.

With this feature you will be able to import your local board forms, brokerage schedules and offers into ViMO to sign them electronically.

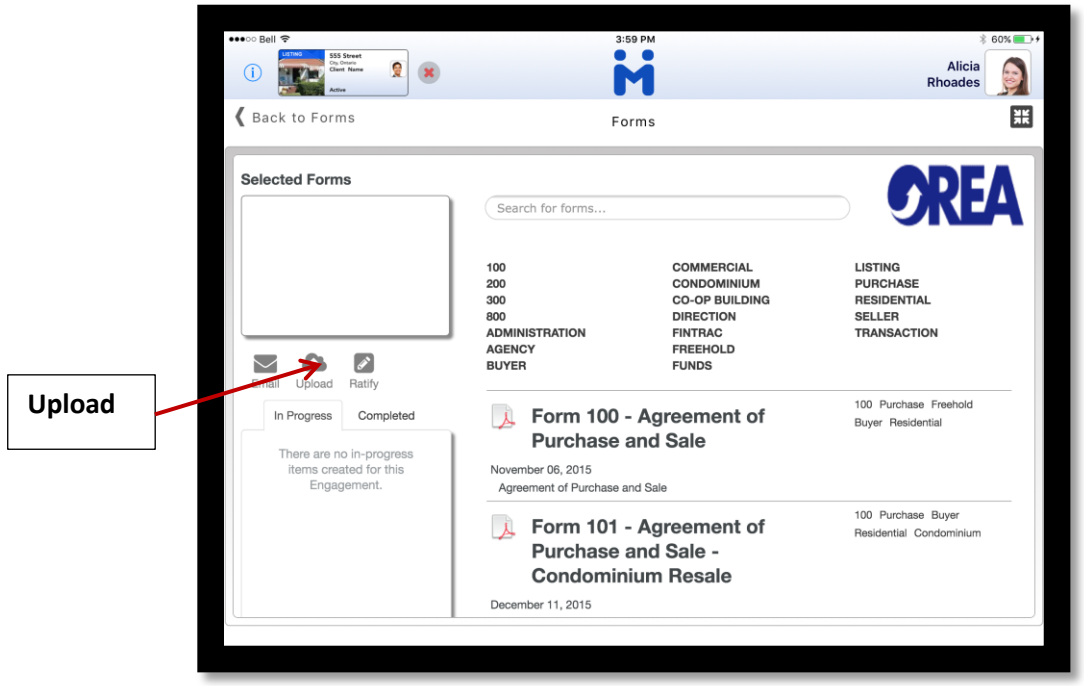
The first step is to set up access to a cloud storage system* that is compatible with your iPad. Below are links to a few systems:

- iCloud: http://www.apple.com/ca/icloud/setup/ios.html
- Drop Box: https://www.dropbox.com/en/help/243
- Google Drive: https://support.google.com/a/answer/2490101?hl=en

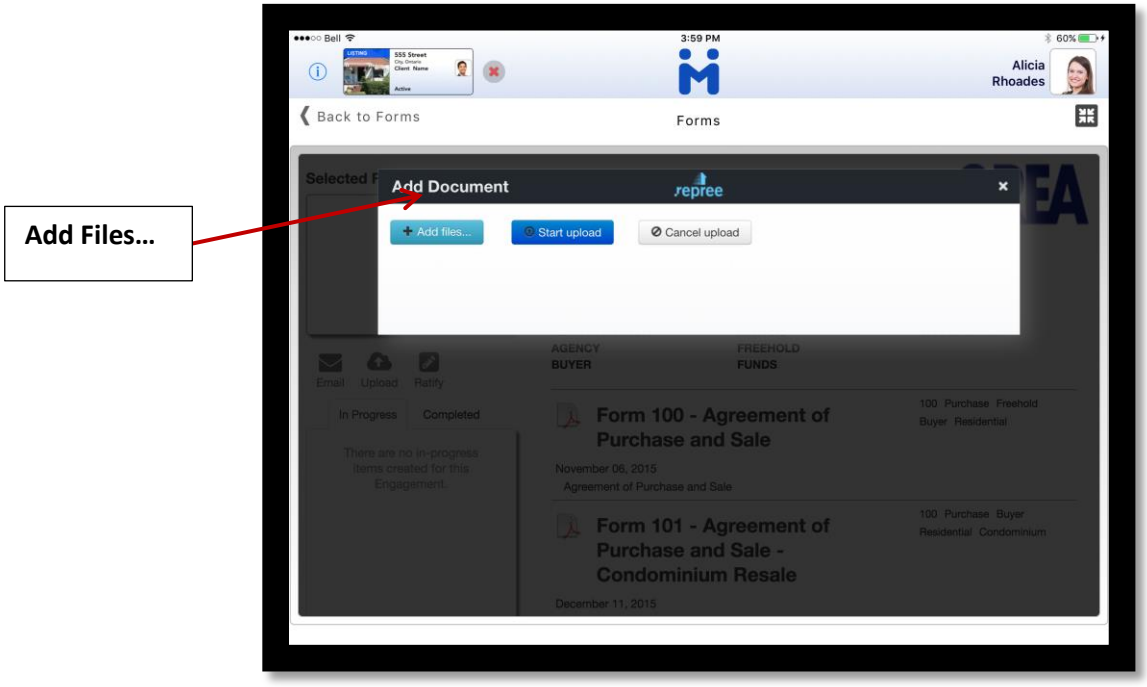
*Teranet Inc. does not endorse or recommend a specific cloud storage system. Please select the system that best suits your needs.

Once you have access to a cloud storage system, save the document(s) in PDF format to it and follow these steps to import it into ViMO.

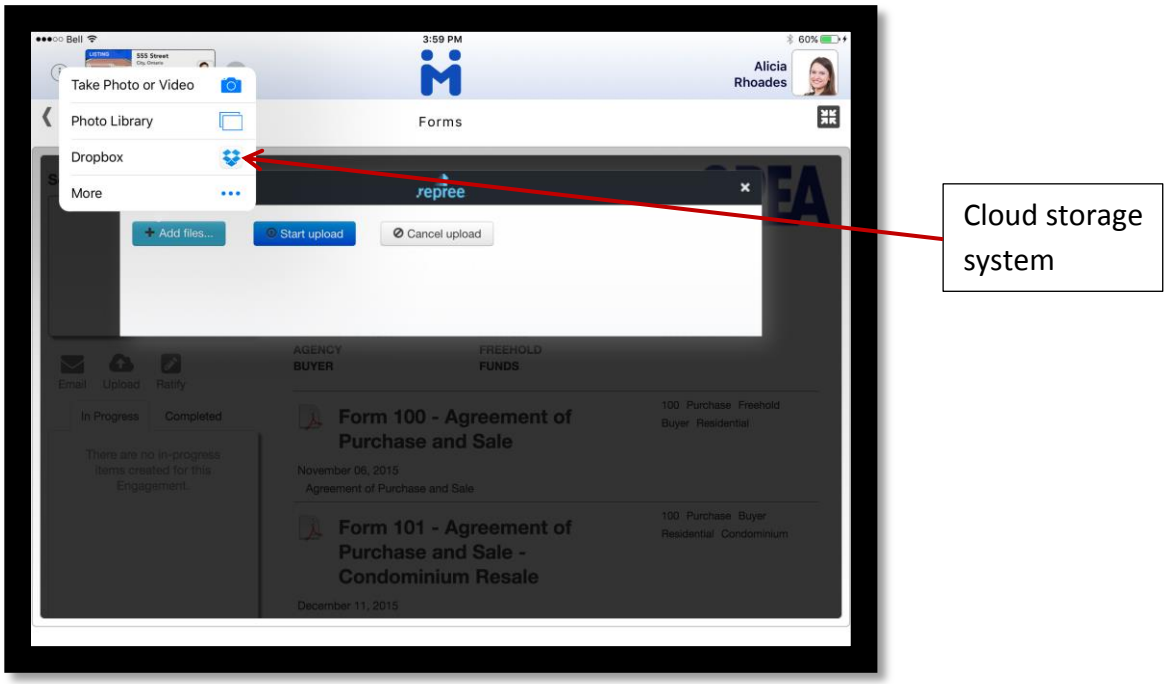
1. Expand the Forms module and select **Upload.**



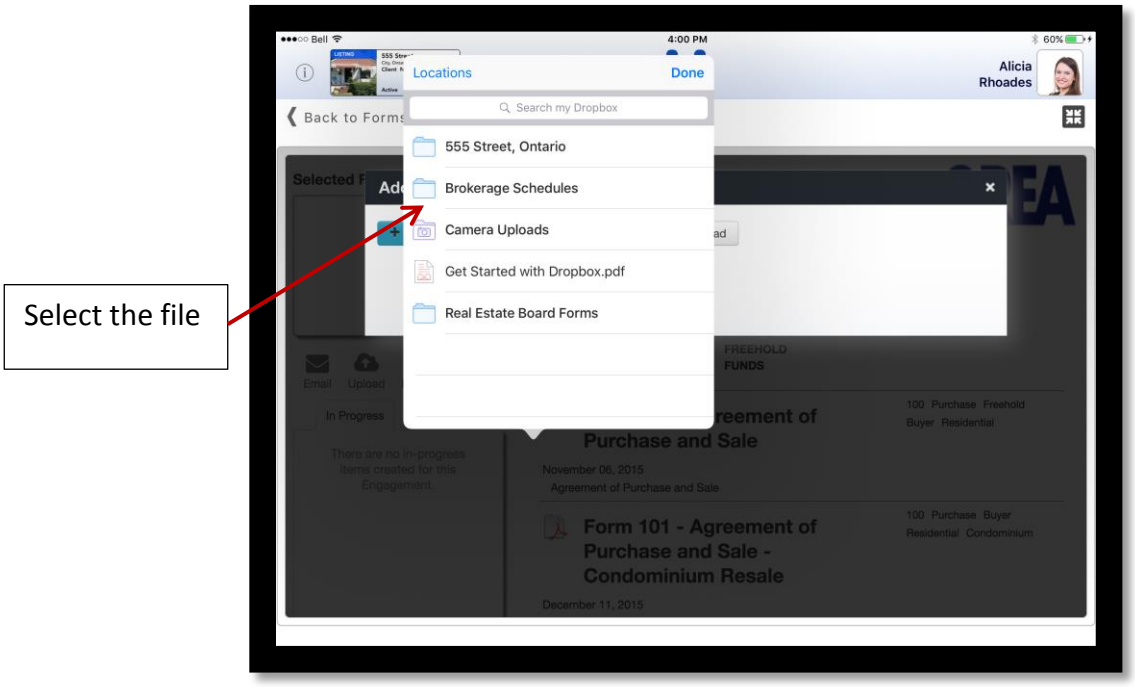
2. Select **Add files…**



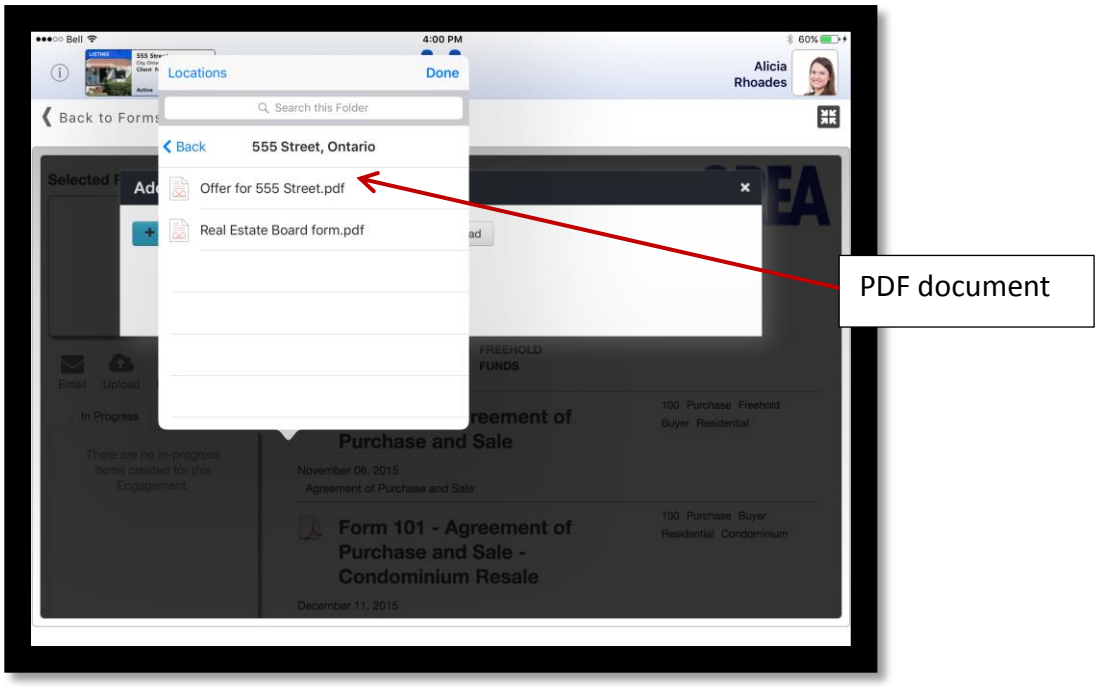
3. Select the cloud storage system in which you saved the PDF document(s) in (i.e. iCloud Drive or Dropbox).



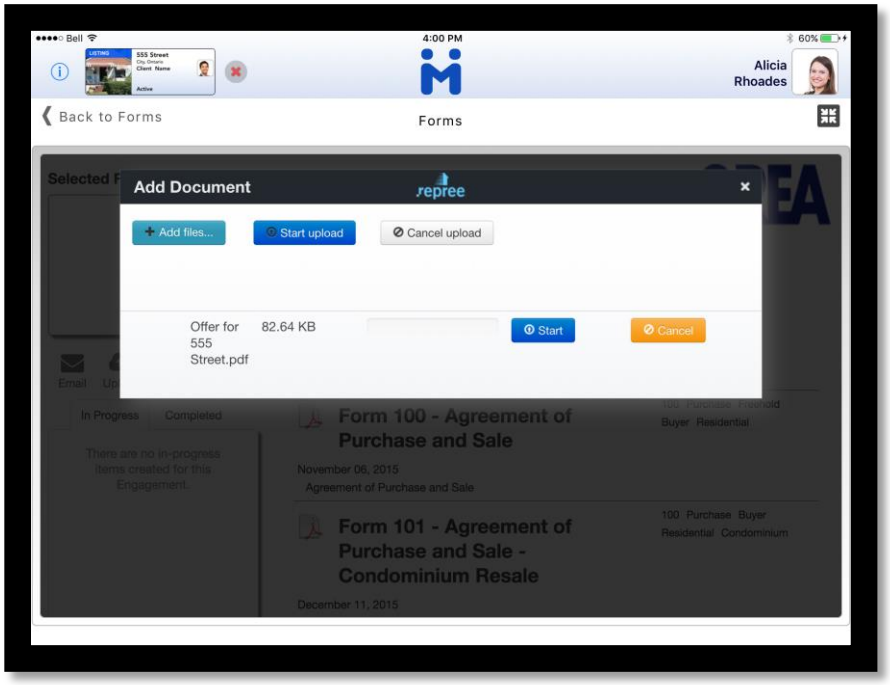
4. If you have organized your document(s) in files, select the file.



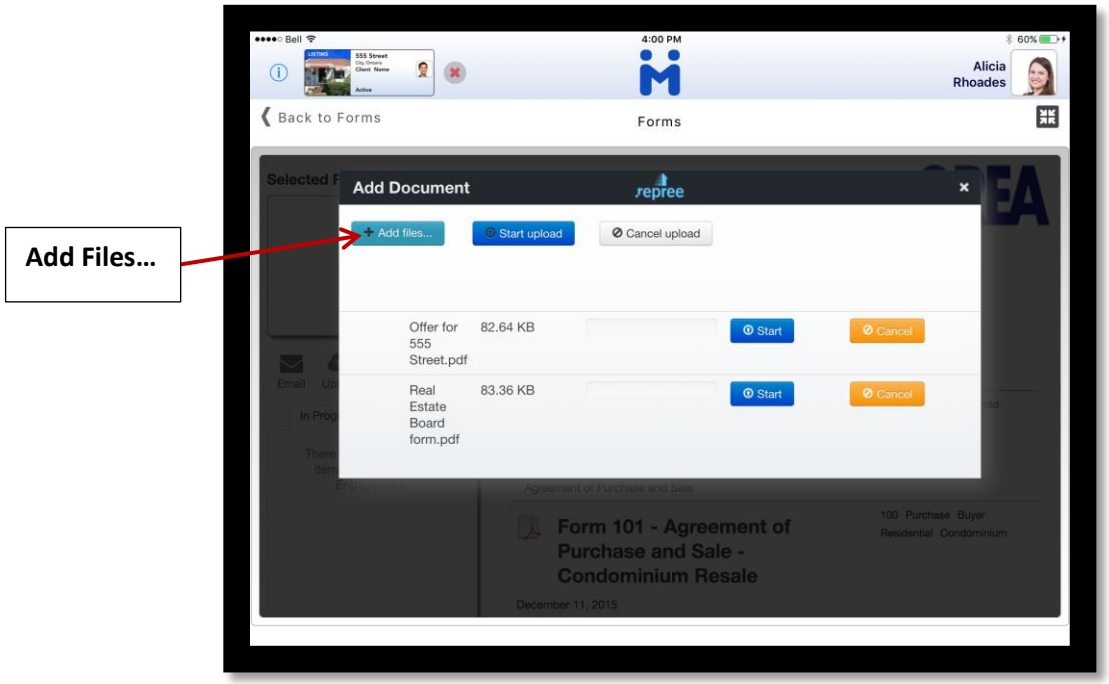
5. Select the PDF document to be imported.



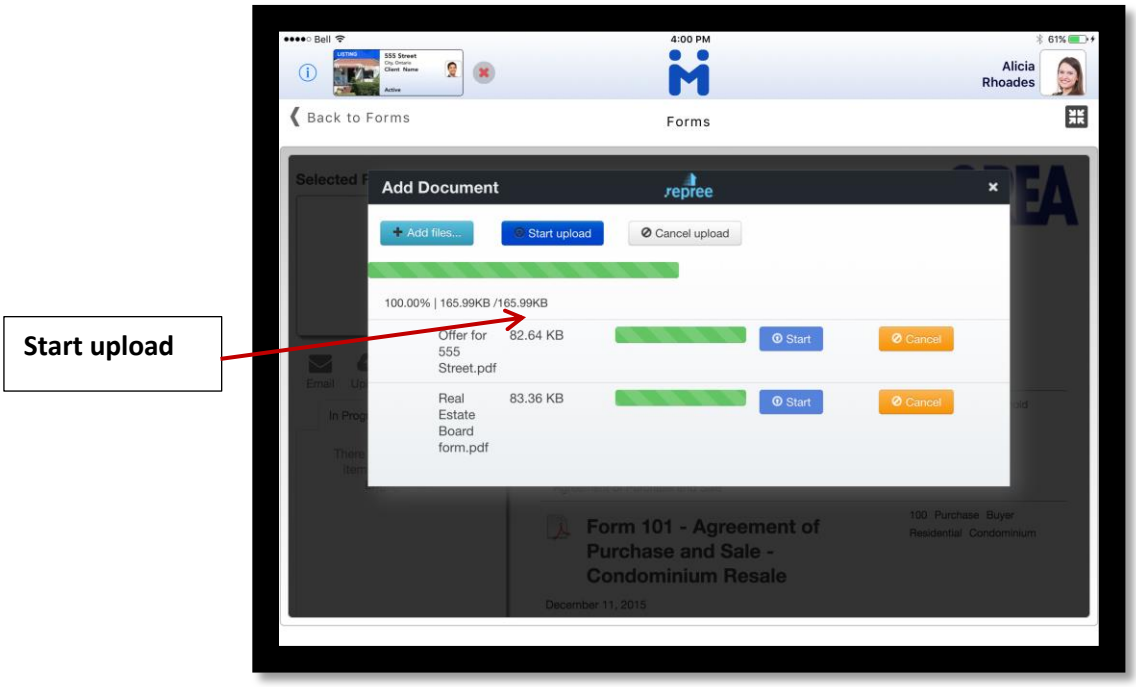
6. The document will be loaded into the **“Add Document”** window



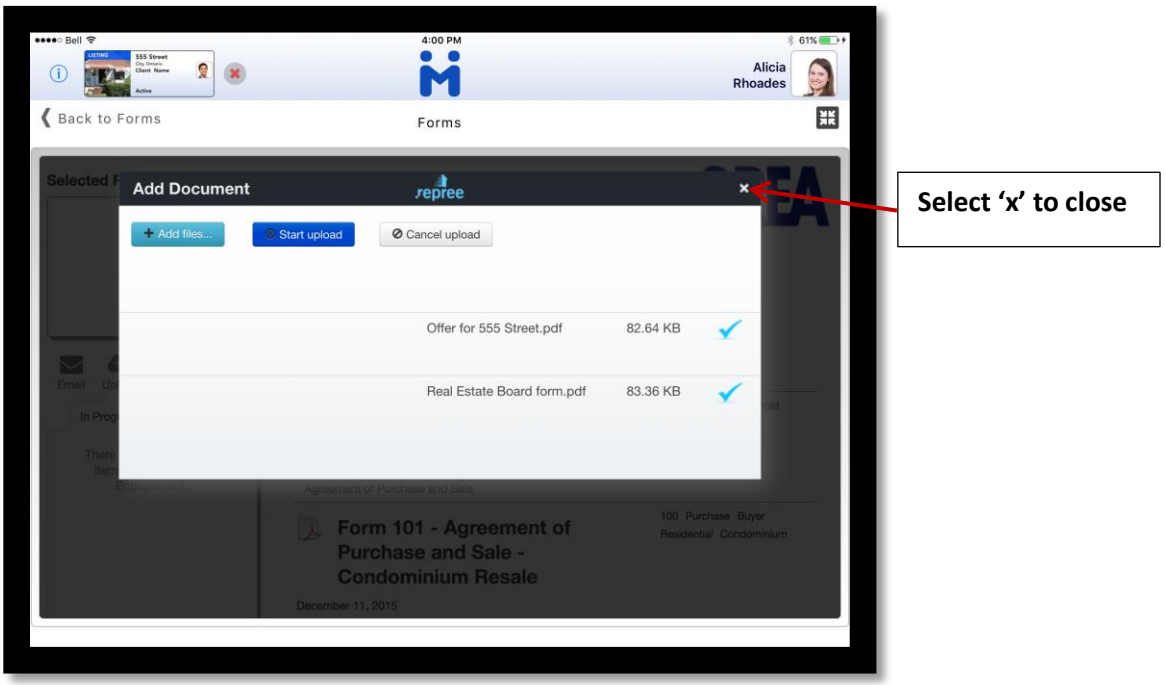
7. If you have more than one document to import select **Add files…** again and repeat the previous steps.



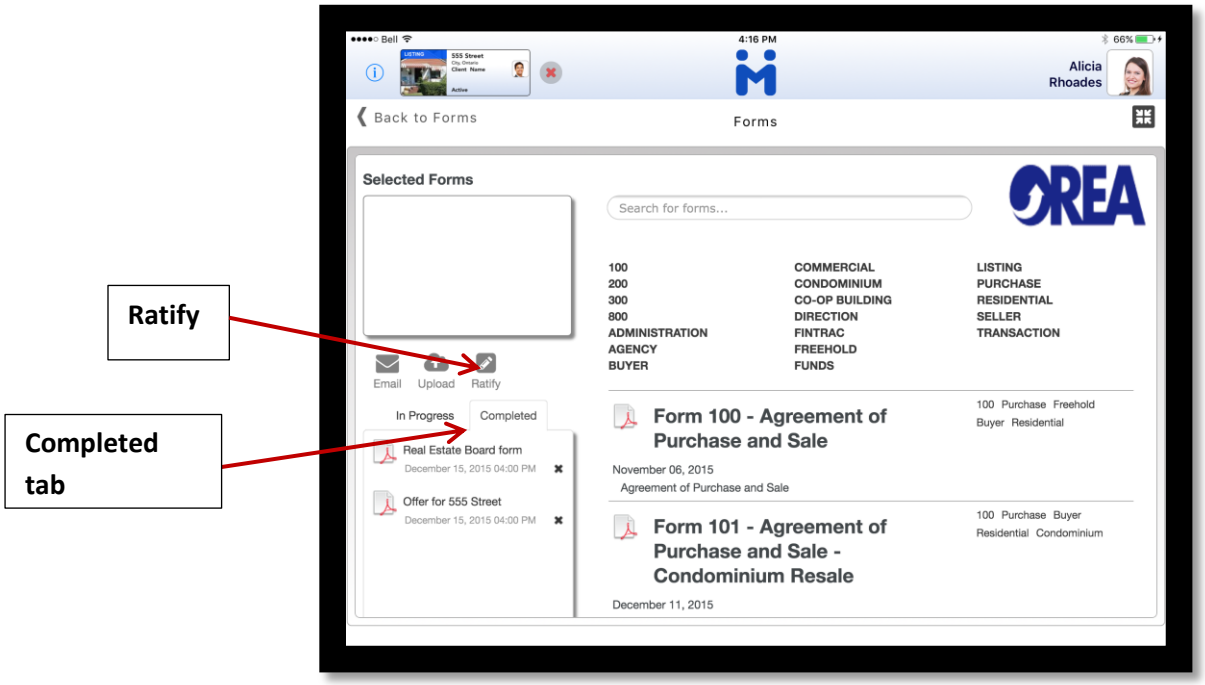
8. Select **Start upload.**



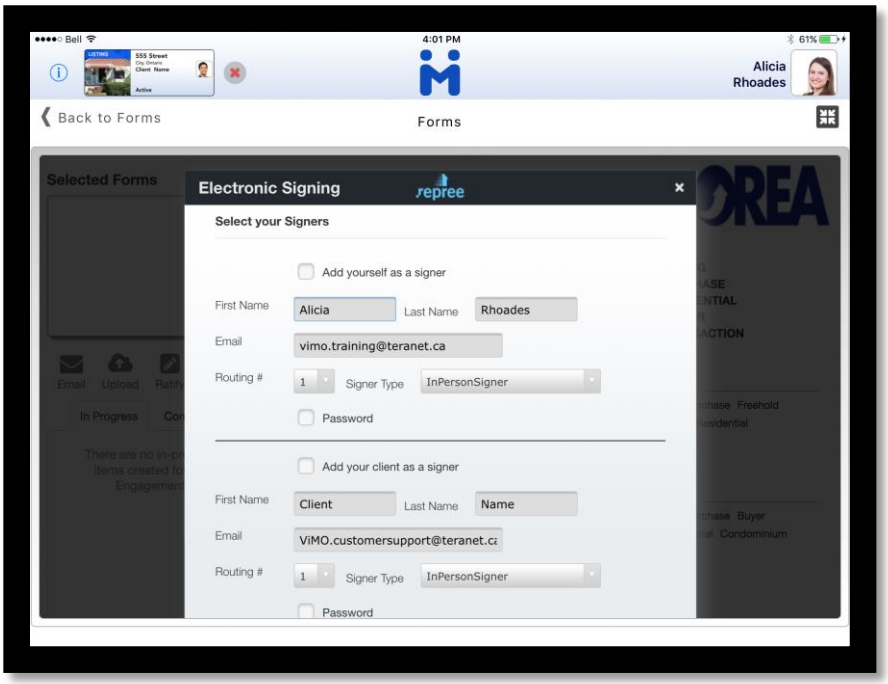
9. A check mark will appear once the document has been successfully uploaded and you close the **"Add Document"** window with the **'x'.**



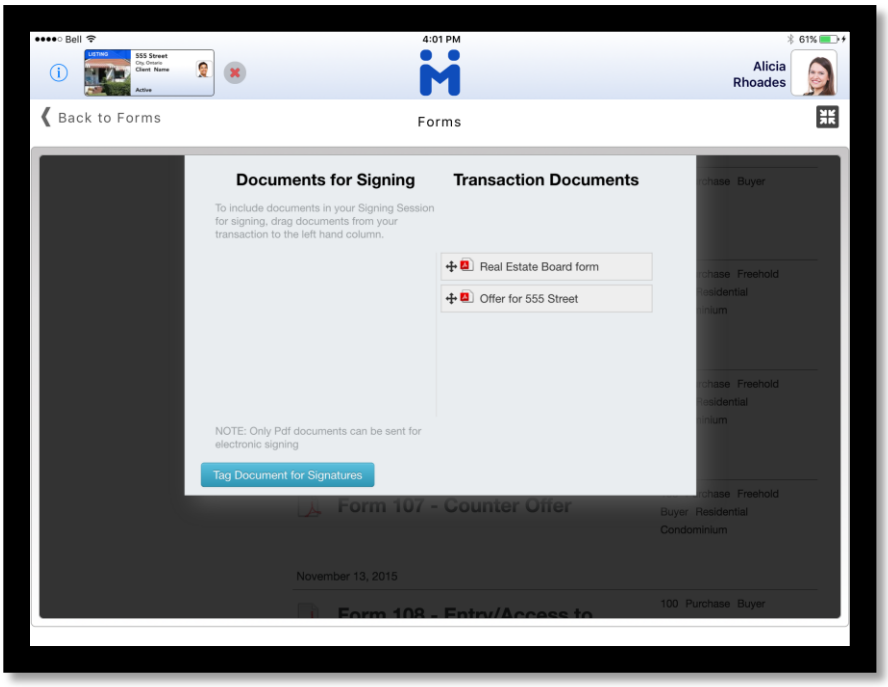
10. The write protected PDF will be loaded into the Completed tab. To start the electronic signing process select **Ratify.**



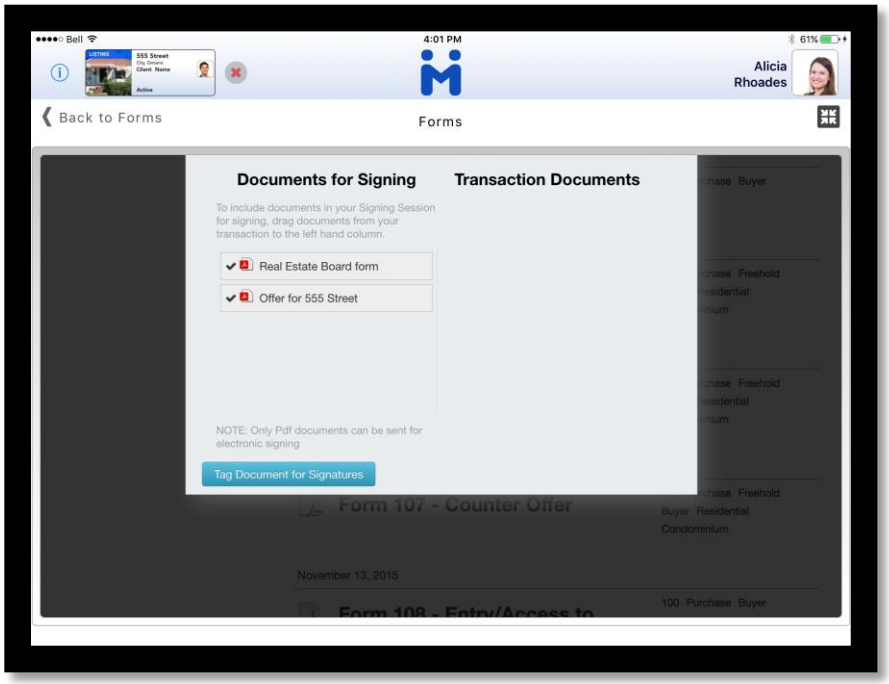
11. The repree™ electronic signing window will open and you can select your signers.



12. Select the form you would like to sign under **“Transaction Documents”** and drag them to the left side of the window under **“Documents for Signing”.**



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

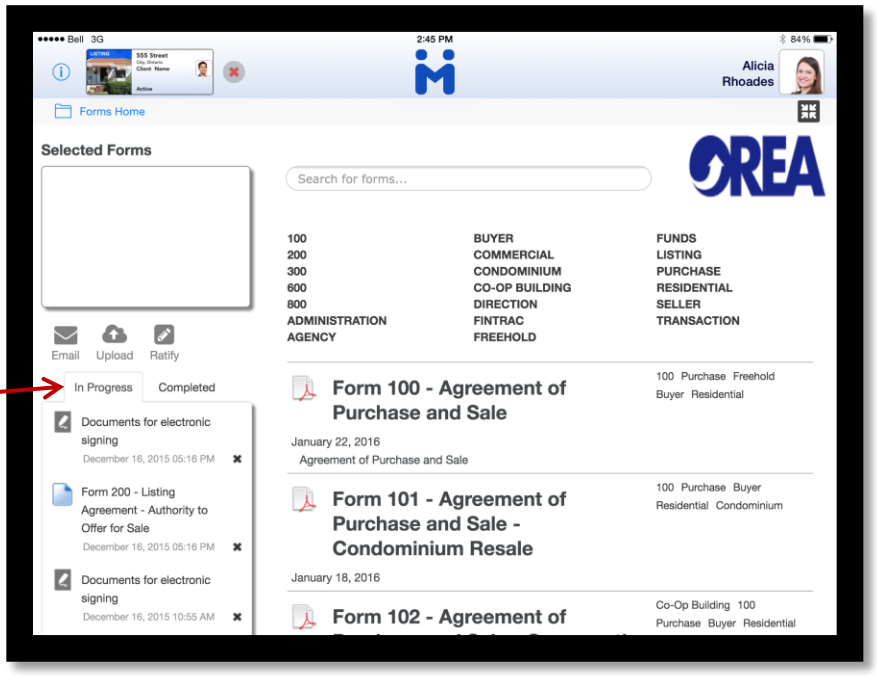


Section 6: Instructions on how to produce a Digital Audit Certificate

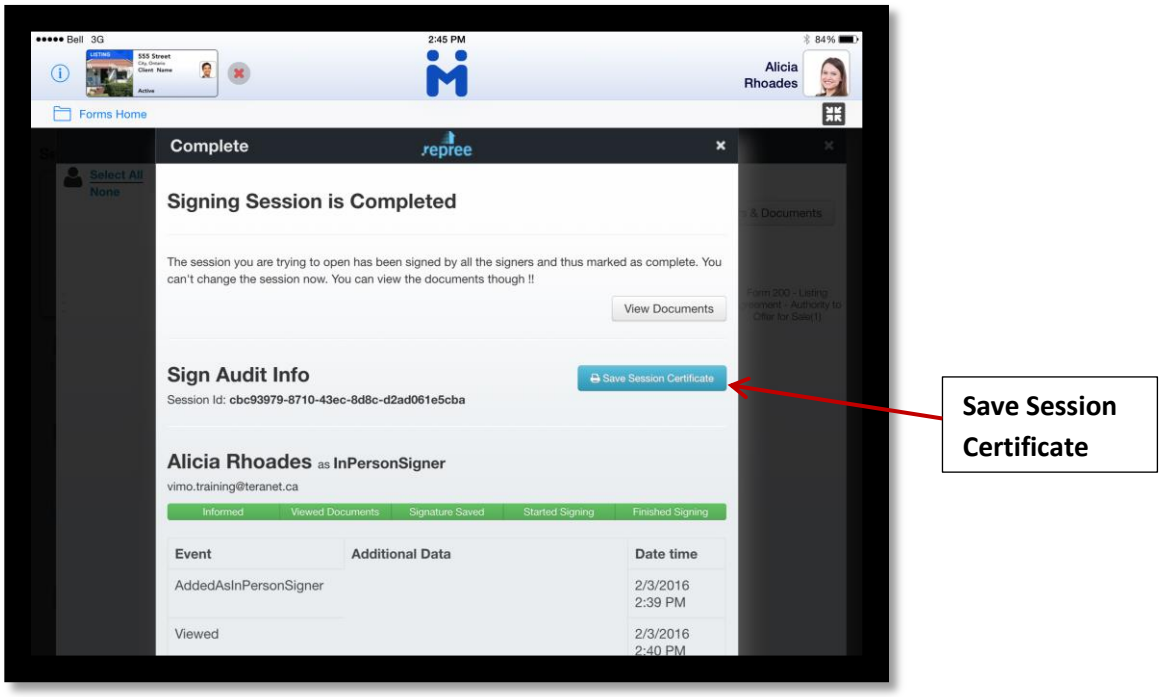
The Digital Audit Certificate is available to Review, Mail, Print and Save to cloud storage.

Once signing of the form is complete, go to the **Forms** module and select **'Document for electronic signing'** in the **"In Progress"** tab

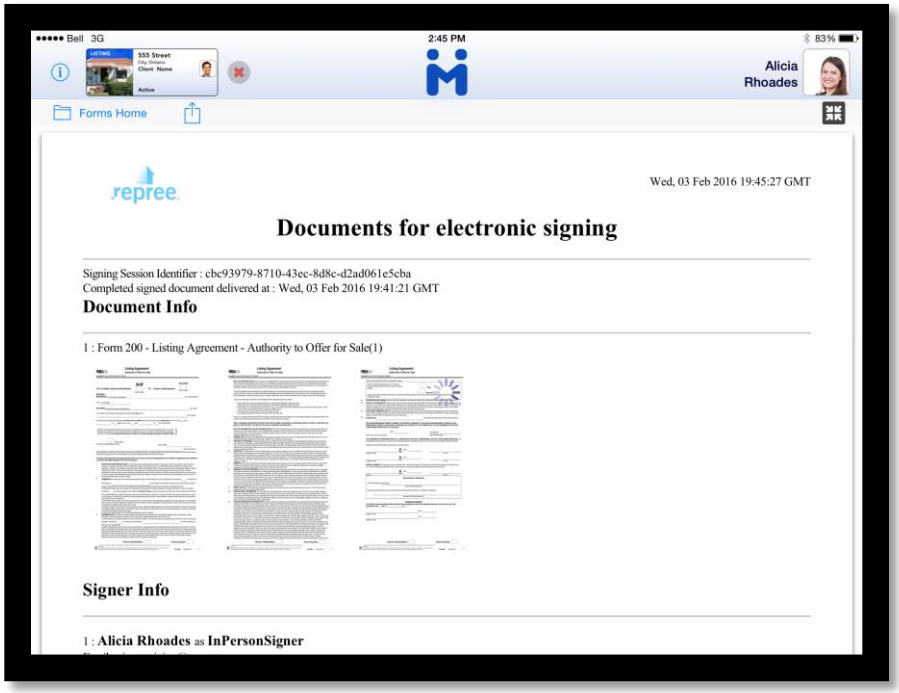
In Progress tab



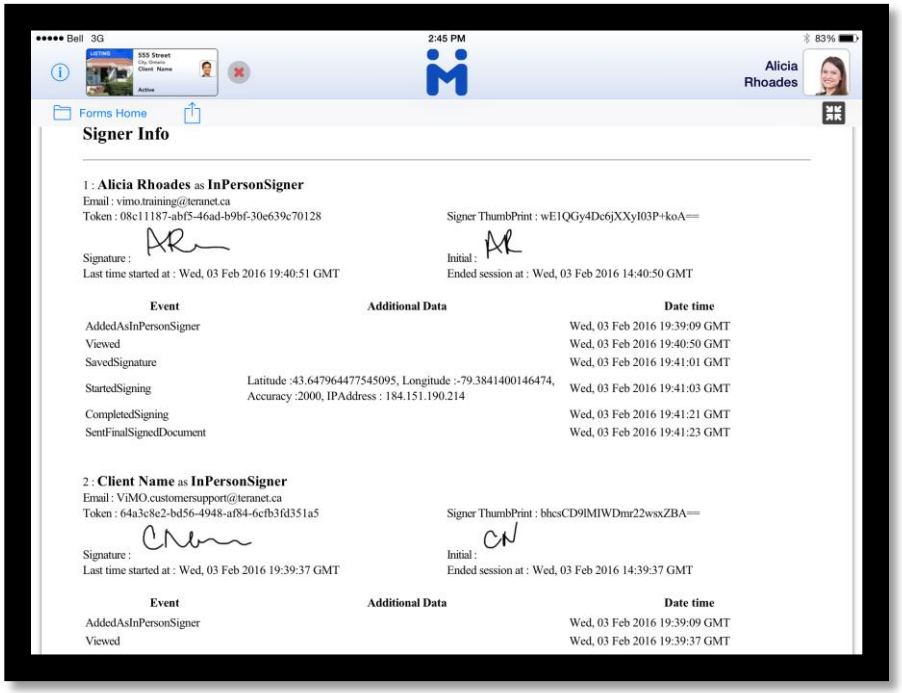
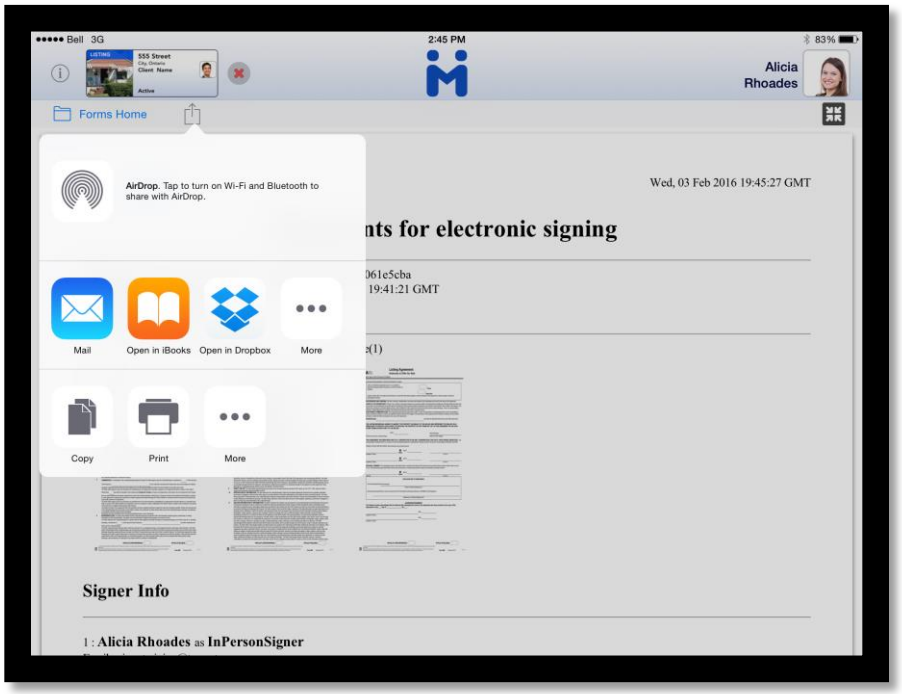
The Complete session window will open. Select **Save Session Certificate**



- The audit trail document will open and it includes two sections: Document Info & Signer Info.
    - Document Info will display a copy of the signed form.



- Signer Info includes all of the details of the signing session such as a copy of the signature, token, date, time and location details.



The iPad share feature will appear at the top of the window. Click on it and select the desired share feature such as Mail, Print, Open in…etc.