

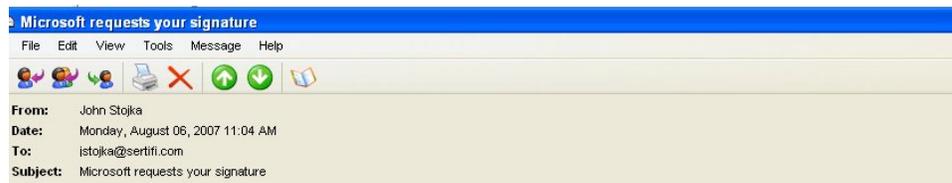
Sertifi Tutorial

Overview: Sertifi automates the process of sending and obtaining documents for approval and signature. A completely web based solution, senders and signers can send, sign and store documents through their web browser.

Signers:

Signing a document with Sertifi is easy:

- 1.) Receive email requesting your approval / signature. Follow instructions inside the email



John Stojka has prepared documents for your signature named "Advocate"

The Microsoft electronic signature solution allows you to sign and retrieve documents in an electronic and paperless environment. It's easy and secure to sign documents.

Click the link below to view and sign the prepared documents or cut and paste the following URL in your browser:
<http://www.sertifi.com/microsoft/hassthrough.asp?email=PnBFEsOR4iqNk3la7XvkbNA8pWBQxe&accesscode=K5Bx32JEHHC5592Uvr3>

Powered by Sertifi Trust Services Online Signature Solution. To learn more visit <http://www.sertifi.com>.

- 2.) At the bottom of the document you will see the Sertifi approval box. Users can add "fields to the box" such as "approve or disapprove" these fields will be stored with the documents

Sign This Document

Please complete the information below

Name To Sign:

Email Address:

I acknowledge that I am applying a legally binding electronic signature in my name to this document, and I have read and agree to the [Terms of Service](#).

[Decline to Sign](#)

Senders

Sending out a signature request is easy. Log into www.sertifi.com/cap

Civil Air Patrol

Electronic Signing Service
Powered By
Sertifi
TRUST SERVICES

Welcome to our Electronic Signing Room
We have prepared documents for your signature.

Email:
Password:

If you already have a Sertifi account you can log in here.
[Forgot your password? Click here](#)

In order to provide speed and convenience we offer the ability for you to complete and sign documents electronically by utilizing our secure e-sign room technology.

It's fast, easy, and secure to sign documents. To get started simply:

- (1) **Create** and verify your account.
- (2) **Review** documents and fill in any forms required.
- (3) **Sign** electronically or print, sign, and fax documents to our automated service.

[Create an Account](#)

If you already have an account please log-in.

Click here if you forgot your password

Setting up the transaction:

Sertifi enables you to send multiple documents out to multiple recipients. To set up a transaction three pieces of information are needed: file name; email addresses and the document or documents you will be sending

1.) From your login- click “send a signature request”



Civil Air Patrol

Electronic Signing Service
Powered By
Sertifi
TRUST SERVICES

Logged in as jstojka@sertifi.com [Logout] FAQ - Support

Administrative Page

This is your starting point for quickly setting up customer transactions.

Send a Signature Request | Transfer/Share Files *Beta | Administration | Sertifi

- Send a signature request
- View my files
- Files requesting my signature (Currently 2 documents)

2.) Enter the “file name” and email addresses of who you will be sending the document to.

IMPORTANT: If you would like to collect comments from the approvers, you must add an additional comments field:

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Create a new signature request

File Details — File Contents — Verification (Step 1 of 3)

File Details * denotes a required field

* File name:

* Enter email addresses of users required to sign this file:
Separate emails with commas

CC to emails: (Non-signers)
Separate emails with commas

Cosign: I want to cosign all documents in this file

Allow documents to be signed: Electronically
 Print, Sign, and Fax
 Either Electronically or Print, Sign, and Fax

For additional authentication would you like to add a group password that you distribute and users must have to sign the document?
 Yes No

Group password:

Would you like to add additional signature fields?
Current fields are Name and Email
 Yes No

Additional fields:

 This last field is for longer responses

You can add additional fields that “approvers” must complete before they approve or sign. If you would like to collect “comments” you may add it here

3.) Upload your document from your computer. Users Can also upload “reference documents’ that are not signed Or need to be signed but available for the signer to reference.



Create a new signature request

File Details — File Contents — Verification (Step 2 of 3)

File Contents

Forms

Place a check for each form to include in this file. Forms can be filled out either by you and/or your customers.

Documents

Upload any additional documents from your computer to place in this file

Document		Title
1:	<input type="text"/> <input type="button" value="Browse..."/>	<input type="text"/>
2:	<input type="text"/> <input type="button" value="Browse..."/>	<input type="text"/>
3:	<input type="text"/> <input type="button" value="Browse..."/>	<input type="text"/>
4:	<input type="text"/> <input type="button" value="Browse..."/>	<input type="text"/>
5:	<input type="text"/> <input type="button" value="Browse..."/>	<input type="text"/>

Reference Documents

Check this box if you will be uploading any reference documents

Upload reference documents that are not signed but viewable for signers to reference

4.) Click finish. You have completed the transaction!



Create a new signature request

File Details — File Contents — Verification (Step 3 of 3)

Verification

Verify your selections below:

File name:	John
Send to emails:	jstojka@sertifi.com
Second Signers:	
CC to emails:	
Cosign:	No
Allow documents to be signed:	Either Electronically or Print, Sign, and Fax
ID Check:	No
Group Password:	
Additional Fields:	
Forms:	
Documents:	te
Reference Documents:	
Invite Customers:	Yes
Invite Email Message:	

Manage Your Transaction

Sertifi enables you to manage all of your documents you have sent out for approval.

Sertifi enables you to:

- View activity. See who has clicked on the link inside the document and who has an has not signed
- Upload documents to your current transactions. You can add existing documents or replace the documents your have sent
- Retrieve signed and unsigned documents
- Invite users to sign again
- Close the transaction and “remove” anyone who has not signed
- Archive the file

View Activity



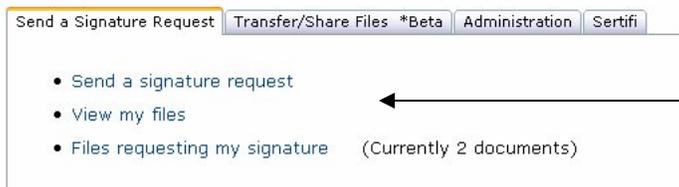
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- Send a signature request
- View my files
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Click “View my Files”



My Files

View Archived Files

File name	Owner	Signers	Created On	Pending	Completed
John	jstojka@sertifi.com	jstojka@sertifi.com	08/02/2007 01:50 PM CST	0	1
Test with hollie	jstojka@sertifi.com	wawa@wawg.cap.gov	08/02/2007 01:42 PM CST	0	0
Decline to sign	jstojka@sertifi.com	jstojka@sertifi.com	07/26/2007 02:09 PM CST	1	0
Expense Report July	jstojka@sertifi.com	akhdqcap@gci.net tjmccabe1@msn.com	07/26/2007 01:58 PM CST	0	1
Test Invoice	emueller@qlr.cap.gov	jstojka@sertifi.com	07/18/2007 01:36 PM CST	0	1

Click on file to get more detail – who has signed, who has not signed, who has opened the email

Files that have not been signed by all parties



File: Test with hollie

Signed documents

Test Document declined.

Participants

Add Participant

wawa@wawg.cap.gov Signer Last Visit: 08/03/2007 02:44 PM CST
[Edit - Remove - Invite] Signed 0 of 1 Last Invite: 08/02/2007 01:42 PM CST

File Maintenance

Invite All Signers Upload Additional Documents Delete This File

Status of document " Declined or Signed " - Last visit displays when users have clicked on the link in their email

-IMPORTANT Remove users – must remove all users who have not signed to show "completed contract".