SKYSLOPE FORMS®

Interactive Worksheet

Use this exercise to learn how to set up your SkySlope Forms profile, create a forms file and send forms for signature. Check off items as you complete them!

Logging in and setting up your Forms profile

Step 1: Log into SkySlope Forms

- ☐ Click here to access the SkySlope Forms login page.
- ☐ Enter your SkySlope credentials

Note: Reach out to the SkySlope Support team if you need assistance!!

Step 2: Adding SkySlope Forms Libraries

If this is your first time accessing SkySlope Forms:

- ☐ Choose your region from the dropdown menu
- ☐ Add your Forms Library(ies)
- ☐ You may need to enter additional information to validate and verify.
    - Once your account is found, your account details will be shown.
    - Click "Verify" to complete the authorization process.

If you have already accessed SkySlope Forms:

- Confirm that the available forms libraries have been added to your account
    - ☐ Click on username dropdown, select Libraries
    - ☐ Your connected association libraries will be displayed, if they have been previously added
    - ☐ To add additional libraries, click on the search bar and follow the prompts to add any available libraries

Notes:

- Broker forms libraries will not be displayed in this section
- If your forms library is not available, please reach out to the SkySlope Support team

Step 3: User Profile Setup - Make sure you complete this step!

- ☐ Click on your name in the upper right corner, and then select "User Profile."
- ☐ Fill out all applicable fields in the Personal & Brokerage Information fields

Congratulations, you are now ready to **create a Forms File on Page 2** of this exercise!

SKYSLOPE FORMS®

Creating Forms Files

Important:

- For this exercise, add yourself in as the client and enter your email address along with your home address or a made up address.
- This will allow you to walk through the experience as both the agent sending the forms for signature and the client receiving and signing the forms for signature!
- You will archive this file after completing the exercise.

Step 1: Create a Forms File

- From the SkySlope Forms Dashboard, click "+ Create New File."
    - ☐ Select your representation (Seller, Buyer, Landlord, or Tenant).
    - ☐ Add the name and email address for the client. (Remember, add your information for this test exercise!)
    - ☐ Property Address: Add your home address or a test address for this exercise
        - Note: MLS import available in certain regions. Enter your MLS number to import data directly into your forms file.
    - ☐ Name your Forms file with one of the following options
        - ☐ Select Address
        - ☐ Select Primary Client
        - ☐ Manually type a custom name into the text field.
    - ☐ Click "Create"

Congratulations, you have successfully created a Forms File and are now **ready to Add and Fill Forms on Page 3** of this exercise!

Adding and Filling Forms

Step 1: Adding Forms to Your File from Forms Library

- After creating or accessing your forms file you have a couple options for adding forms.
  - **Click "+ Add Forms"** to access forms from your Association/MLS and Broker libraries (as applicable)
    - ☐ Type the form name into the search bar to search.
    - ☐ Clicking on the form will allow you to preview it before adding it.
    - ☐ Click the "+ Add" button to the right to add the form for filling.
    - ☐ Continue to search for and add forms until you are done.
    - ☐ Once forms are added, the action bar will appear in the bottom-right corner
    - ☐ Click "Next"
  - **Click "Upload"** to upload pdf forms from your computer
    - ☐ Click "Upload Documents" and select one or more documents from your computer
    - ☐ Click "Done"

Step 2: Selecting Forms to Fill and Send

On the Forms tab, all forms that have been added with the Add Forms or Upload Documents functionality will be displayed.

- Clicking on the circle in the upper-left corner of the form will select the form.
  - ☐ Complete this step for all the forms you would like to send for signature
  - ☐ Click "Fill and Send" in the bottom right-hand corner once you are ready to fill out your forms

Step 3: Filling Forms

On the Form Filling page, scroll through the forms to fill them one page at a time. Any areas that can be filled are indicated by a blue field. **Note:** All data is ***automatically saved*** as you go!!

- ☐ Fill out all appropriate fields.
- ☐ Once finished filling out all forms, click "Prepare Signature" to send the forms for signature.

Note: You do not need to click save/exit before sending for signature. Clicking Save/Exit will provide you with the option of saving this group of documents into a "Draft Envelope" to send at a later time.

Congratulations, you have successfully filled out your first set of Forms and are **ready to Create an Envelope and Send for Signature on Page 4!**

Creating and Sending an Envelope (Forms for Signature)

Step 1: Preparing and Sending Envelopes

After filling out your form(s) and clicking Prepare Signature

- ☐ Name your envelope and select signer actions.
  Tip: Name your envelope something unique to differentiate it from other envelopes.
- ☐ Click "Next"
- ☐ Review documents to ensure they are ready to be sent for signature.
- ☐ If you uploaded a form from your computer, you can utilize the DigiSign tools to add any required fields (e.g., signature, initial, date/time, initials, etc.)
- ☐ Click "Send" once you are ready to send them for signature.
- ☐ Customize the Email Subject Line and Email Message for your signer to review, then click "Send for Signature."
- ☐ If any of the forms require your signature, the “Sign Now” feature is available to save you time!

Step 2. Signing Forms from email via DigiSign

- ☐ Navigate to your email and locate the email with forms for signature.
- ☐ Follow the prompts to view and complete all required fields.

Once the forms are fully signed, all parties will receive an email notification and the forms will be attached in pdf format to the email.

Congratulations, you have successfully sent and signed your first forms for signature via an Envelope in SkySlope Forms!

[Head to Page 5 to learn how to link your forms files to your transaction/listing in SkySlope and how to check Envelope statuses!]

Linking your Forms File to your Transaction/Listing in SkySlope

IMPORTANT: Do not complete this step for test files. Only complete this step for actual transactions/listings.

Step 1: Create your Transaction or Listing

- ☐ Navigate to SkySlope via the Apps dropdown
- ☐ Click Create New and select Transaction or Listing
- ☐ By default, you will be on the Forms toggle, select your forms file from the listing or use the search option
- ☐ Click on the circle to select your file
- ☐ Complete the steps as you normally would to create your listing/transaction
- ☐ Navigate to the documents tab. All forms signed in SkySlope Forms will automatically upload to the documents tab!

Checking Envelope Status (Status of Forms sent for Signature)

Step 1: Envelope Statuses

To check an envelope's status after sending:

- ☐ Access your Forms file
- ☐ Navigate to the Envelopes tab
- ☐ Refer to the Status column.
- ☐ Click the Action menu to view additional options like resend, rename, download and more!

Congratulations, you have successfully created a file, added and filled out forms, sent forms for signature and completed signing! **Please see Page 6 for additional support/learning resources!**

SKYSLOPE FORMS®

SkySlope Support & Learning Resources!

Reach our 24/7 Rockstar Support Team if you need further assistance!

1. **Phone** 📲 800-507-4117, option 2 for Support
2. **Email** 📩 support@skyslope.com
3. **Live Chat** 🗨️ support.skyslope.com
    a. Just click on Chat in the bottom right corner of the screen

SkySlope Forms Tutorials & Training

Become a SkySlope Expert! Register for an on-demand SkySlope Forms webinar!

The Basics

1. Adding Associations
2. How to Create a Forms File
3. How to Fill Forms
4. Preparing and Sending an Envelope
5. Forms Tips + Tricks

Time-Savers

1. Create Files Faster with MLS Import
2. Creating Forms Templates
3. Applying Forms Templates
4. Create SkySlope Files with Forms Data

Ready for more? Click here to browse all of our Forms how-to guides!