boat dox

BOATDOX IS THE ONLY YACHTING INDUSTRY OWNED SOLUTION DESIGNED TO "PRIVATELY" FACILITATE YOUR YACHT AND BOAT SALES IN <u>JUST 4 STEPS</u>.

Version 1.0

PURCHASE & SALE DEALS: 4 STEP OVERVIEW

STEP 1: ADD DATA (PAGE 3)
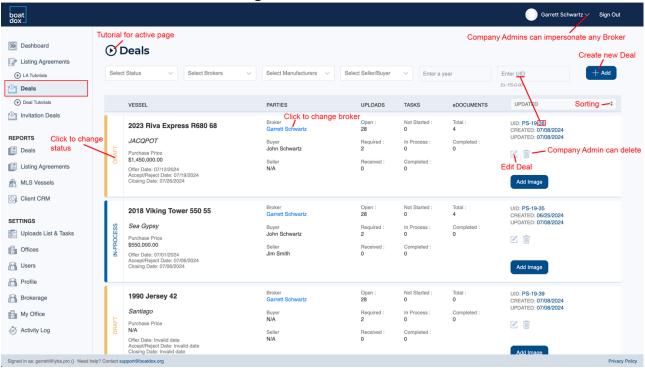## STEP 2: SELECT DOCUMENTS (PAGE 4)
STEP 3: VERIFY DOCUMENTS (PAGE 5 & 6)
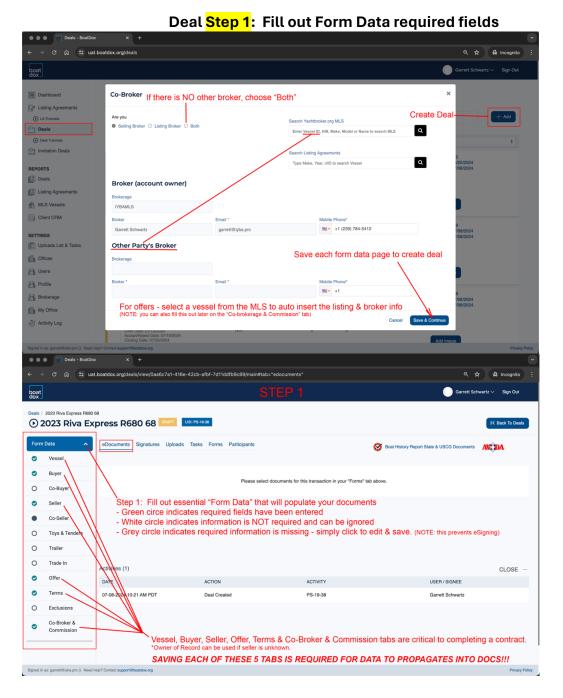## STEP 4: PROCESS SIGNATURES (PAGE 7)

<u>ADDITIONAL FEATURES (WATCH VIDEOS ON SPECIFIED PAGES)</u>

1. MANAGE & TRACK REQUIRED UPLOADED DOCUMENTATION
2. MANAGE & TRACK REQUIRED TEAM TASKS
3. ENABLE SELECTIVE NOTIFICATION EMAILS
4. CO-BROKERAGE LIMITED SECURE ACCESS TO SELECT DOCUMENTS
5. INVITE OUTSIDE ASSISTANCE WITH A SECURE GUEST ACCOUNTS
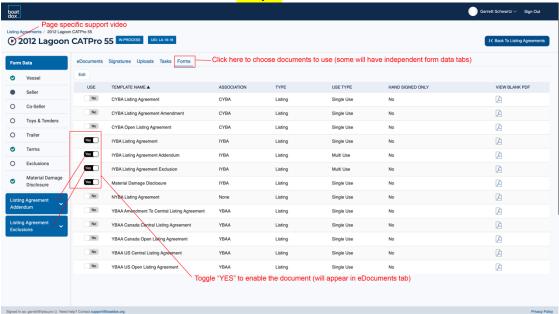
Deals Main Page – accessible from left menu

Actions available:
1. Add new Deal
2. Access Editor to complete the Deal
3. Change Status
4. Change broker (Company Admin can impersonate a broker)
5. Delete (Company Admin only)
6. Click "Play" icon in title to view page's video tutorial

Deal Step 1: Fill out Form Data required fields

Actions available:

1. Save and continue through each Form Data section after +Adding new Deal
2. Save and continue through each Form Data section upon Editing Deal
3. Data can be edited up until a document is sent for signature!
4. Enter your MLS vessel ID to import your Yachtbroker.org vessel data
5. Green circles = required data has been entered
6. White circles = ignored section (not applicable to the Deal)
7. Grey circles = INCOMPLETE data which will block all signature options
8. Click "Play" icon in title to view page's video tutorial
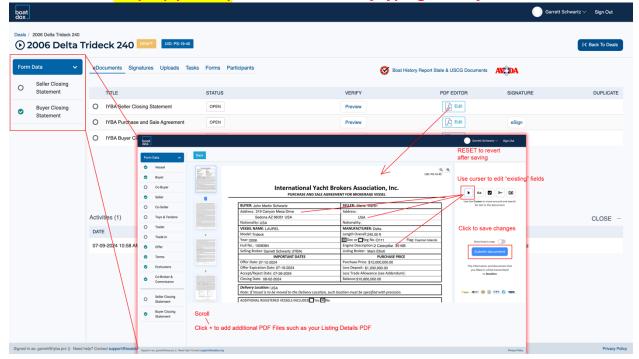
Deal Step 2: Select documents

Actions available:
1. Click "Forms" and toggle "Yes" on the documents you wish to use
2. Some documents will have their own form data sections in the left menu
3. Click "Play" icon in title to view page's video tutorial

Deal <mark>Step</mark> 3: Verify Form Data contains ALL required fields

Actions available:

9. Click "Preview" to view your PDF with form data inserted into the document
10. Changes to Form Data require closing & reopening "Preview" to view results
11. Download file (top right download icon) to manually hand sign this document
12. Close window to return to main website to continue
13. Click "Play" icon in title to view page's video tutorial

Optional Actions available:

1. Click "PDF Edit" to review your PDF with form data inserted into the document
2. Type directly onto the PDF using the curser option and then "submit" to save
3. Click "BACK" on top left to return to main page
4. Click "RESET" on top right to undo any edits previously saved allowing form data to update back into the document
5. Company Admin can enable/disable broker PDF Edit access in Brokerage settings
6. Click "Play" icon in title to view page's video tutorial
7. *Watch dedicated tutorials on PDF Editor for instructions regarding all possibilities at boatdox.org – password iyba2023*

Deal <mark>Step</mark> 4: Send for signature or upload manually signed files

Actions available:
1. Click "eSign" to open the Signatures tab with the selected document toggled Open+
2. If manually signed PDF or image files, click the calendar icon & date to upload files
3. If electronic signature is required, click "Send" and select from 2 options:
   a. Send – enter your message, select the persons to be notified upon signing and click Send. Boatdox will send an email template with a link to sign.
   b. Generate Link (preferred) – Boatdox will create a link you can copy and review in a browser, text or email to your signer or the broker for further forwarding to the signer
4. Company Admin can enable "notify all Company Admins" messages on full document signing in Brokerage settings
5. Click "Play" icon in title to view page's video tutorial

<mark>NOTES & KNOWN ISSUES:</mark>
1. <mark>Once sent for signature, ALL edits are blocked from entering the PDF so nothing can be changed without the signer knowing about it</mark>
2. <mark>Once signed, each document will show the name, email, date and IP address of signer for verification</mark>
3. <mark>Once sent for signature OR signed, the document must be RESET if you'd like to make updates or start over. Copies of the previous version will be saved in the activity log. (MORE DOCUMENTS TO BE ADDED)</mark>
4. <mark>CYBA & NYBA PSA documents require multi-step signatures for an offer, acceptance and execution – these phases are in development.</mark>