



**BOATDOX IS THE ONLY YACHTING INDUSTRY OWNED SOLUTION DESIGNED TO
“PRIVATELY” FACILITATE YOUR YACHT AND BOAT SALES IN JUST 4 STEPS.**

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)**

ADDITIONAL FEATURES (WATCH VIDEOS ON SPECIFIED PAGES)

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

Deals Main Page – accessible from left menu

Garrett Schwartz | Sign Out

Deals

Select Status | Select Brokers | Select Manufacturers | Select Seller/Buyer | Enter a year | Enter UID (Ex: PS-0-0) | + Add

VESSEL	PARTIES	UPLOADS	TASKS	eDOCUMENTS	UPDATED
2023 Riva Express R680 68 JACQPOT Purchase Price \$1,450,000.00 Offer Date: 07/12/2024 Accept/Reject Date: 07/19/2024 Closing Date: 07/26/2024	Broker Garrett Schwartz Buyer John Schwartz Seller N/A	Open : 28 Required : 2 Received : 0	Not Started : 0 In Process : 0 Completed : 0	Total : 4 Completed : 0	UID: PS-19-38 CREATED: 07/08/2024 UPDATED: 07/08/2024 Edit Deal Add Image
2018 Viking Tower 550 55 Sea Gypsy Purchase Price \$550,000.00 Offer Date: 07/01/2024 Accept/Reject Date: 07/06/2024 Closing Date: 07/06/2024	Broker Garrett Schwartz Buyer John Schwartz Seller Jim Smith	Open : 28 Required : 2 Received : 0	Not Started : 0 In Process : 0 Completed : 0	Total : 4 Completed : 0	UID: PS-19-35 CREATED: 06/25/2024 UPDATED: 07/08/2024 Add Image
1990 Jersey 42 Santiago Purchase Price N/A Offer Date: Invalid date Accept/Reject Date: Invalid date Closing Date: Invalid date	Broker Garrett Schwartz Buyer N/A Seller N/A	Open : 28 Required : 2 Received : 0	Not Started : 0 In Process : 0 Completed : 0	Total : 0 Completed : 0	UID: PS-19-39 CREATED: 07/08/2024 UPDATED: 07/08/2024 Add Image

Signed in as: garrett@lyba.pro | Need help? Contact support@boatdcox.org | Privacy Policy

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

The image shows two screenshots from the BoatDox interface. The top screenshot is the 'Co-Broker' form, which includes sections for 'Are you' (Selling Broker, Listing Broker, Both), 'Broker (account owner)', and 'Other Party's Broker'. It features search fields for Yachtbroker.org MLS and Listing Agreements, and input fields for Brokerage, Email, and Mobile Phone. A red box highlights the '+ Add' button, and another red box highlights the 'Save & Continue' button. Red arrows point to these buttons with the text 'Create Deal' and 'Save each form data page to create deal'. A note at the bottom of the form states: 'For offers - select a vessel from the MLS to auto insert the listing & broker info (NOTE: you can also fill this out later on the "Co-brokerage & Commission" tab)'. The bottom screenshot shows the 'Form Data' tab for a deal titled '2023 Riva Express R680 68'. The 'Form Data' sidebar on the left has a red box around it, and red arrows point to the 'Vessel', 'Buyer', 'Seller', 'Offer', 'Terms', and 'Co-Broker & Commission' tabs. A red box also highlights the 'eDocuments' tab. A note in the center says: 'Step 1: Fill out essential "Form Data" that will populate your documents - Green circle indicates required fields have been entered - White circle indicates information is NOT required and can be ignored - Grey circle indicates required information is missing - simply click to edit & save. (NOTE: this prevents eSigning)'. A table below shows an activity log with columns for DATE, ACTION, ACTIVITY, and USER / SIGNEE. A red box highlights the 'Offer' and 'Terms' rows. A note at the bottom says: 'Vessel, Buyer, Seller, Offer, Terms & Co-Broker & Commission tabs are critical to completing a contract. *Owner of Record can be used if seller is unknown. SAVING EACH OF THESE 5 TABS IS REQUIRED FOR DATA TO PROPAGATES INTO DOCS!!!'. The deal status is 'DRAFT' and 'UID: PS-19-38'.

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

boat dox

Listing Agreements / 2012 Lagoon CATPro 55

2012 Lagoon CATPro 55 IN-PROCESS UID: LA-19-19

Garrett Schwartz Sign Out

Page specific support video

← Back To Listing Agreements

Form Data

- Vessel
- Seller
- Co-Seller
- Toys & Tenders
- Trailer
- Terms
- Exclusions
- Material Damage Disclosure
- Listing Agreement Addendum
- Listing Agreement Exclusions

eDocuments Signatures Uploads Tasks **Forms** — Click here to choose documents to use (some will have independent form data tabs)

Edit

USE	TEMPLATE NAME ▲	ASSOCIATION	TYPE	USE TYPE	HAND SIGNED ONLY	VIEW BLANK PDF
<input type="checkbox"/> No	CYBA Listing Agreement	CYBA	Listing	Single Use	No	
<input type="checkbox"/> No	CYBA Listing Agreement Amendment	CYBA	Listing	Single Use	No	
<input type="checkbox"/> No	CYBA Open Listing Agreement	CYBA	Listing	Single Use	No	
<input checked="" type="checkbox"/> Yes	IYBA Listing Agreement	IYBA	Listing	Single Use	No	
<input checked="" type="checkbox"/> Yes	IYBA Listing Agreement Addendum	IYBA	Listing	Multi Use	No	
<input checked="" type="checkbox"/> Yes	IYBA Listing Agreement Exclusion	IYBA	Listing	Multi Use	No	
<input checked="" type="checkbox"/> Yes	Material Damage Disclosure	IYBA	Listing	Single Use	No	
<input type="checkbox"/> No	NYBA Listing Agreement	None	Listing	Single Use	No	
<input type="checkbox"/> No	YBAA Amendment To Central Listing Agreement	YBAA	Listing	Single Use	No	
<input type="checkbox"/> No	YBAA Canada Central Listing Agreement	YBAA	Listing	Single Use	No	
<input type="checkbox"/> No	YBAA Canada Open Listing Agreement	YBAA	Listing	Single Use	No	
<input type="checkbox"/> No	YBAA US Central Listing Agreement	YBAA	Listing	Single Use	No	
<input type="checkbox"/> No	YBAA US Open Listing Agreement	YBAA	Listing	Single Use	No	

Toggle "YES" to enable the document (will appear in eDocuments tab)

Signed in as: garrett@lyba.pro | Need help? Contact support@boatdox.org

Privacy Policy

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 Step 3: Verify Form Data contains ALL required fields

Option 1: Preview PDF

Form Data

TITLE	STATUS	VERIFY	PDF EDITOR	SIGNATURE	DUPLICATE
YBBA Seller Closing Statement	OPEN	Preview	Edit		
YBBA Purchase and Sale Agreement	OPEN	Preview	Edit	eSign	
YBBA Buyer Closing Statement					

International Yacht Brokers Association, Inc.
PURCHASE AND SALE AGREEMENT FOR RECREATIONAL VESSEL

BUYER: John Martin Schwartz Address: 375 Canyon Mesa Drive Scottsdale AZ 85261 USA	SELLER: Doris Martin Address: USA
NATIONALITY: USA	NATIONALITY: USA
VESSEL NAME: LAUREL	MANUFACTURER: Doris
Model: Doris	Length Overall: 24' 0"
Year: 2006	Color of Hull: White-Blue
Eng No: 103088	Engine Information: 2 Cylinder, 301088
Selling Broker: Garrett Schwartz (YBBA)	Listing Broker: Doris Martin
Offer Date: 07-12-2024	Purchase Price: \$200,000.00
Offer Expiration Date: 07-13-2024	Less Deposit: \$1,200,000.00
Accept/Reject Date: 07-26-2024	Less Trade Allowance (See Addendum):
Closing Date: 08-02-2024	Balance: \$19,800,000.00

ADDITIONAL REGISTERED VESSELS INCLUDE: Yes/No

1. Agreement: Buyer agrees to purchase, and Seller agrees to sell, all right, title and interest to and in the Vessel described above on the terms and conditions set forth in this Purchase and Sale Agreement ("PSA"). Capitalized terms used in this PSA refer to the corresponding terms in the table above unless otherwise defined herein. The "Effective Date" of this PSA is the date on which it has been signed by both parties. "Vessel" also includes all gear, machinery, equipment, furniture, fuel, consumables, and all registered or unregistered trailers, toys, articles and appurtenances on board the vessel and/or included on the Vessel's listing specification as of the date of this Agreement, except for items listed on the Exclusions List provided by the Seller or Listing Broker on the earlier of (a) five (5) days from the Effective Date or (b) the Accept/Reject Date, which items are not included in the sale. Buyer will be deemed to have accepted the Exclusions List if it accepts the Vessel. Listing Broker and Selling Broker shall be referred to herein as the "Brokers". If there is a Trade Allowance, the conditions of the trade-in will be governed by the attached Trade-In Vessel Addendum. If either party fails to sign this PSA and deliver to the other party on or before the Offer Expiration Date, this PSA will be ineffective.

2. Deposit: Within 2 business days (or 3 business days if left blank) following Seller's signature of this PSA, Buyer shall pay the Deposit to the Selling Broker's account, as acknowledged below, as a deposit toward the Purchase Price to be held subject to the terms of this PSA. Seller may refuse to permit Buyer to proceed with the trial run, survey and other inspections of the Vessel until the Deposit has cleared into the Selling Broker's escrow account.

3. Survey, Option, Acceptance of Vessel, Conditions of Survey: Buyer's obligation to purchase the Vessel is subject to Buyer's satisfaction, in Buyer's sole discretion, with a trial run and survey of the Vessel (though Buyer may elect not to have the Vessel inspected, if inspected). (a) Buyer will select the surveyor. (b) the surveyor, and not the Brokers, will be the sole party responsible for any errors or omissions with respect to the survey, notwithstanding that the Brokers may have provided information to and assisted Buyer with hiring the surveyor. (c) Seller shall make the Vessel available and Buyer shall complete the trial run and survey as soon as practicable. (d) Seller shall pay all towing expenses for, and assume the risks associated with, the trial run, and Buyer shall pay all costs of the survey, including associated costs, e.g., haul-out, dry dock, and subcontractor's charges. (e) Buyer and its surveyor will be solely responsible for determining the scope of the survey and the trial run to assess the vessel's conformity with Buyer's requirements and (f) Buyer shall deliver written notice of rejection or acceptance of the Vessel to Seller or the Listing Broker on or before the Accept/Reject Date. As

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

Deal Step 3 (optional): Force PDF edits by typing directly on the PDF

The screenshot displays the BoatDox interface for editing a PDF document. The main document is titled "International Yacht Brokers Association, Inc. PURCHASE AND SALE AGREEMENT FOR BROKERAGE VESSEL". The document content includes fields for Buyer and Seller information, Vessel Name (LAUREL), Manufacturer (Delta), and Purchase Price (\$12,000,000.00). The interface features a sidebar on the left with "Form Data" and "Activities" sections. A top navigation bar includes "Documents", "Signatures", "Uploads", "Tasks", "Forms", and "Participants". A right-hand panel contains editing tools such as "Edit", "eSign", and "Submit documents". Red annotations highlight specific actions: "RESET to revert after saving" (top right), "Use cursor to edit existing fields" (top right), "Click + to add additional PDF Files such as your Listing Details PDF" (bottom left), and "Click to save changes" (bottom right).

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 cursor 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 Step 4: Send for signature or upload manually signed files

The screenshot displays the BoatDox interface for document management. A sidebar on the left shows document status: Seller Closing Statement (Draft), Buyer Closing Statement (Open), and NYBA Buyer Closing Statement (Draft). The main area shows a list of documents with columns for Title, Status, Verify, PDF Editor, Signature, and Duplicate. A modal window titled 'Send for eSignature' is open, showing a table of recipients and options to 'Send' or 'Generate Link'. Red annotations highlight key features: 'Include Message' (generates a link for manual signing), 'Send' (triggers email template), 'eSign' (opens signature section), and 'Upload PDF or image files' (for manually signed documents).

TITLE	FULL NAME	EMAIL	MOBILE PHONE	COMPANY
Buyer	John Martin Schwartz	jm@yba.pro	+13026 631-2345	YBA
Seller	Maria Martin	maria@yba.pro	+1341 893-8061	YBA
Selling Broker	Garrett Schwartz	garrett@yba.pro	+1202 784-5412	YBA
Listing Broker	Mark Elliott	markesell@yba.pro	+13025 794-1167	International Health Corporation
Lawyer	Annie Kusek	ak@yba.pro	+1812 555-1212	PLHS, Inc.

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

NOTES & KNOWN ISSUES:

1. Once sent for signature, ALL edits are blocked from entering the PDF so nothing can be changed without the signer knowing about it
2. Once signed, each document will show the name, email, date and IP address of signer for verification
3. 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)
4. CYBA & NYBA PSA documents require multi-step signatures for an offer, acceptance and execution – these phases are in development.