

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

Version 1.0

LISTING AGREEMENTS: 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

boat dox Tutorial for this page Company Admin can impersonate any broker Dashboard **Listing Agreements** Listing Agreements +Add () LA Tutorials Deals Click to change broker Create new LA Deal Tutorials EDOCUMENTS Invitation Deals 2012 Lagoon CATPro 55 Click to change Harmony II Seller Kinger, LLC Schwartz Deals status Listing Agreements Click to April 24, 2024 (3 months) MLS Vessels enter LA Add Image Client CRM 2010 Azimut dtat 77

John Schwartz

Add Image

Listing Agreement Main Page - accessible from left menu

Actions available:

Signed in as: garrett@iyba.pro () Need help? Contact support@boatdox.org

SETTINGS

Uploads List & Tasks

Offices

Users

Profile

Brokerage

My Office

1. Add new Listing Agreement (LA)

Tester Boat

Test Vessel
Asking Price
\$100,000.00

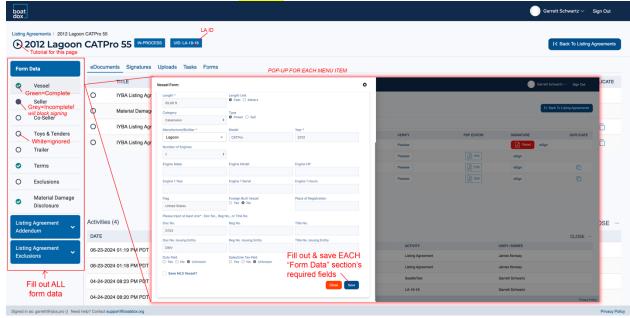
Listed On February 15, 2024 (5 months)

2. Access Editor to complete the LA

2003 Hargrave View Demo Boat 28

- 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

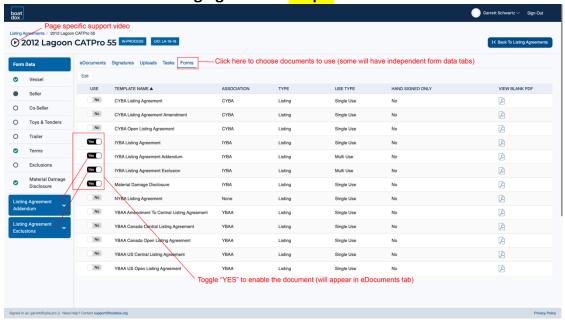
Listing Agreement Step 1: Fill out Form Data required fields



Actions available:

- 1. Save and continue through each Form Data section after +Adding new LA
- 2. Save and continue through each Form Data section upon Editing LA
- 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 LA)
- 7. Grey circles = INCOMPLETE data which will block all signature options
- 8. Click "Play" icon in title to view page's video tutorial

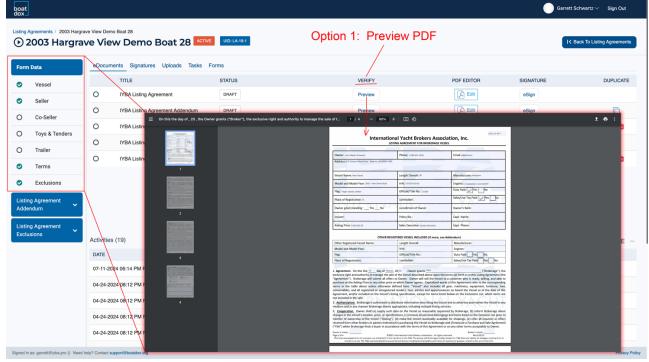
Listing Agreement Step 2: Select documents



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

Listing Agreement Step 3: Verify Form Data contains ALL required fields



Actions available:

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

boat dox I Back To Listing Agreements Vessel Edit 0 IYBA Li 0 0 0 IYBA Lis 0 Trailer 0 IYBA Listi International Yacht Brokers Association, Inc. LISTING AGREEMENT FOR BROKERAGE VESSEL Aa 🔽 2~ 🖾 0 Exclusions Phone: 1-928-631-2345 Owner: John Martin Schwart Click to save changes Model and Model Year: 2003 HIN: 123123123123 Activities (19) Duty Paid: X Yes No DATE Use Tax Paid: XYes N Place of Registration: FL 04-24-2024 08:12 PM Asking Price: \$100,000.00 Sales Executive: Garrett Sc 04-24-2024 08:12 PM scroll

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

Optional Actions available:

1. Click "PDF Edit" to review your PDF with form data inserted into the document

Click + to add additional PDF files such as Listing Details PDF

- 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

Listing Agreements / 2003 Hargrave View Demo Boat 28 eDocuments Signatures Uploads Tasks Forms PDF EDITOR TITLE STATUS VERIFY DUPLICATE Vessel 0 IYBA Listing Agreement DRAFT eSign Seller 0 Toys & Tenders 0 Trailer Send for eSignature Select Whom To Notify When Signed or Rejected: FULL NAME EMAIL Exclusions Co-Selle Toys & Ten Upload PDF or image files of manually signed document Listing Agreeme CLOSE rett Schwartz IVBA LISTING AGREEMENT EXCLUSION tt Schwartz

Listing Agreement Step 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

NOTES & KNOWN ISSUES:

- Once sent for signature, ALL edits are blocked from entering the PDF so nothing can be changed without the signer knowing about it
- Once signed, each document will show the name, email, date and IP address of signer for verification
- 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.
- 4. Material Damage form must be prefilled out for seller(s) to sign in future we will allow seller to fill out these fields.