

Blue Moon Software presents

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Electronic Signature

Quick Start Guide

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It is now possible to capture signatures electronically for Lease documents generated in Forms Online® via the Blue Moon Electronic Signature System.

This document describes how to activate and use the E-signature feature.

About E-signatures

The Blue Moon Electronic Signature System enables property owners to collect signatures electronically, without the need to collect traditional handwritten signatures from the parties to the Lease contract. *Documents signed electronically have the same legal consequences as those signed using the traditional method.*

While Blue Moon does not preserve Lease documents generated for E-signature collection beyond an initial 30-day period (it is recommended that you save and/or print a copy of the document prior to expiration), signature information recorded via the Electronic Signature System can be accessed in the Forms Online program indefinitely.

E-signature is only available in Blue Moon Forms Online. Users of Blue Moon Forms for Windows are advised to migrate to the Web-based Forms Online program if they want to utilize this feature.

For assistance with migration of your current Windows-based product license or for more information about Blue Moon Forms Online, please contact our Sales line toll-free at (800) 772-1004.

Activating the E-signature Feature

Before you can begin collecting electronic signatures, you must first activate this feature by performing the following steps:

1. Log into Blue Moon Forms Online.
2. Click the "System Configuration" tab (note that an Administrator-level login is required to access this section).
3. Under the heading labeled "Electronic Signatures," check the "Enable E-signatures" box.
4. If applicable, select the credit card types (MasterCard, Visa, etc.) that you accept for payment of fees and/or deposits, which can be collected from residents at the time of signature.
5. Click the "Apply" button.

Requesting Electronic Signature for Lease Documents

From the “Lease Database” section:

1. Open a lease record in the Lease Editor using the “Create New Lease” or “Edit Lease” option.

(If you use a third-party property management program, such as Yardi Voyager, Intuit MRI or RealPage OneSite, you may “Export” to Blue Moon per the standard process you currently use for that product).

2. Enter/update relevant field information in Lease Editor as applicable.

(Note that the Beginning Lease Date must fall AFTER the current date; otherwise, the Lease document cannot be signed electronically).

3. When you have verified that field values shown are complete and accurate, click the “View Print Menu” button.

4. On the Print Menu screen, make sure that the Lease form is selected for printing. You may also select a combination of other forms/addenda to include in the Lease document.

5. Check the box labeled “Request E-signature,” located to the right of the “Print Selected Forms” button. Some forms requiring additional manual completion by residents prior to signature, such as the *Inventory and Condition* form (in TAA & NAA forms software), may become disabled when this option is selected.*

*(If the “Request E-signature” checkbox is not visible, make sure that you have completed the steps listed under *Activating the E-signature Feature* shown above; if the option is visible but disabled, make sure that the Lease form is selected for printing, and check that the Beginning Lease Date entered is AFTER the current date).*

6. Once you have selected all of the forms you wish to include in the Lease document, click the “Print Selected Forms” button.

(Please note that your clicks/forms counter will be charged at this time, regardless of whether you continue with the E-signature request process).

7. Wait a few moments for the Lease document to load in a new window. A column with the heading “E-signature Request Form” should appear to the left of the Lease document. If it does not, please check that you have completed all of the steps above.

* Please note that the *Lease Contract Guaranty* cannot presently be included in Lease documents generated for E-signature, as that form requires manual completion by the guarantor parties prior to execution.

8. Enter the relevant information shown in the E-signature Request Form, including the owner's/owner's rep. name and e-mail address, as well as the e-mail addresses of the parties from whom you are requesting signature.
9. If you wish to collect a fee from the signing parties at the time of signature, you may specify the total fees/deposits to be collected, along with a description (e.g., "\$35.00 Application Fee + \$250.00 Security Deposit").
10. After you have inspected the Lease document for accuracy, you may submit it to all parties for electronic signature by clicking the "Initiate E-signature Request" button.

The E-signature Collection Process

Upon submitting an E-signature request, as outlined above, a confirmation e-mail detailing the transaction will be sent to the specified owner's address. The signing parties will also receive e-mails notifying them that a Lease document requires their electronic signature.

Each signer will be able to view the Lease document prior to providing his/her signature and will be given an opportunity to provide payment via credit card for any applicable fees and/or deposits. *Please note that credit card payments are not processed automatically via the Electronic Signature System.* Payment information provided by signing parties can be retrieved by the leasing agent upon submission from within the Forms Online program.

The property owner will receive an additional notification e-mail after each party has applied his/her electronic signature to the Lease document. Once all parties have signed the document, the owner will receive a final notification, advising him/her that the Lease is ready to be executed.

Executing Electronically Signed Lease Documents

Even after electronic signatures from the signing parties have been collected, the Lease shall not be considered "executed" until the property owner has applied his/her own signature to the document.

To execute a Lease document:

1. Log into Blue Moon Forms Online.
2. Click the "Manage E-signatures" option.
3. A listing of pending electronic signature requests should appear. Click the "Manage" link to the right of the transaction you wish to execute.
4. If all signing parties have applied their signature to the Lease document successfully, you should see a section labeled "Executing the Lease Package."

(If you do not see this section, all signatures have not been collected, which means the Lease document cannot be executed yet).

5. Enter your name (i.e., the Owner/Owner's Rep.) in the field provided.
6. Click the "Execute Lease Now" button.

Upon executing the Lease, you are advised to print and/or save a final copy of the Lease document, to which a receipt page has been appended, detailing all of the signatures collected.

The signing parties will also receive confirmation via e-mail of the execution of the Lease document. They are also advised to print and/or save a copy of the executed document for their records.

Merging Online Rental Applications into the Lease Document

Properties which utilize the Blue Moon Online Rental Application service to capture applicant data can now merge the resulting Rental Application form into the Lease document that is generated for electronic signature.

This feature eliminates the need to print a Rental Application form for each applicant prior to generation of the Lease and provides the means to collect signatures from all applicants/residents along with the other forms in the Lease document in a single transaction.

For more information about the Online Rental Application service, visit <http://www.bluemoon.com/developers>.

To tie an applicant to a lease record in Forms Online (requires activation of the E-signature feature):

Method 1: Starting from Applicant

1. Click on the "Application Forms" tab; then click "Online Rental Applications."
2. Locate the record for the applicant you wish to "move into" a unit; then click the "Move In" link at right.
3. In the interface that follows, enter the Unit Number to which you wish to link the applicant; then click the "Find" button (or click "Find All" to return all lease records for current property).

If a record matching your search criteria is returned, you have the option to move the applicant into a "new" lease record, or add him/her to an existing record.

To link the applicant to a new record, select the pull-down option of your choice (i.e., "Overwrite," "Duplicate," or "Pre-lease"), and click "New."

Otherwise, click "Add" to insert the applicant as a resident of the existing lease record.

4. At this point, the selected lease record will appear in the Lease Editor, with the applicant selected for move-in appearing in the first available Resident field.*
5. Click the "Save" button to apply changes.

To move additional applicants into a unit, you may exit the Lease Editor and repeat the steps above, or you may remain in the Lease Editor and follow the instructions outlined in *Method 2* below.

Method 2: Starting from Lease Record

1. If you are not already in the Lease Editor (see *Method 1* above), open a lease record using the "Create New Lease" or "Edit Lease" option.

(If you use a third-party property management program, such as Yardi Voyager, Intuit MRI or RealPage OneSite, you may "Export" to Blue Moon per the standard process you currently use for that product).

2. Click the "Move In" button next to an available Resident field. To unlink an applicant from the lease record, click the "Move Out" button next to that resident.
3. In the window that appears, select the desired applicant from the list (the listing of applicants can be sorted alphabetically by name or in the order received, starting with the most recent); then click "Move In."
4. Repeat the steps above as necessary.
5. Click the "Save" button to apply changes.

* Note that the applicant/resident's name is "grayed out" and cannot be modified. This is because the resident name is tied directly to the name contained in the application record. If this name is not correct, then it follows that the name that appears on the Rental Application is also invalid, and therefore, an application containing the correct name would need to be resubmitted and re-imported into the lease record.

Additional Notes

Lease documents generated for E-signature are “active” for a period of 30 days from the time of generation and can only be executed during that time. Likewise, pending Lease documents can be viewed by the property owner and the signing parties as needed only while they are active in the system, after which, they are permanently deleted from the Blue Moon server. Blue Moon advises all parties to print and/or save a copy of the Lease document prior to its expiration.

A Lease package can only be signed electronically up until the end of the first day of the Lease term. Likewise, an E-signature request cannot be initiated for a Lease document if the Beginning Lease Date specified for that record has already passed. If the Lease document has not been signed by all residents prior to the start of the Lease term, the transaction will be removed from “pending” status in the Blue Moon E-signature System, and no further signatures can be collected for the document. In that event, the property manager may choose to adjust the Lease term and generate the modified Lease package for electronic signature as appropriate.

Lease documents awaiting electronic signature are locked and therefore not affected by additional changes made to the source lease record once the document has been generated. Please be sure that the contents of the Lease document are complete and accurate prior to submitting it for E-signature. If you need to change the contents of a Lease package after it has been sent out for signature (but before it has been executed), you should first delete the transaction record from the “Manage E-signatures” section. You may then modify the record as needed in the Lease Editor and follow the steps for requesting E-signature again.

Once a Lease document has been executed, the signatures collected electronically during that transaction are stored on a permanent basis (unless expressly deleted by the user) in the Forms Online program. While the transaction is active, the E-signature receipt page can be accessed by viewing the Lease package via the “Manage E-signatures” interface. Subsequent to expiration of the Lease document, the receipt can still be accessed by clicking the “View Signatures” button in the same location.

There is no charge for reviewing the Lease document from the management console. A clicks/forms charge is only assessed at the time the document is generated.