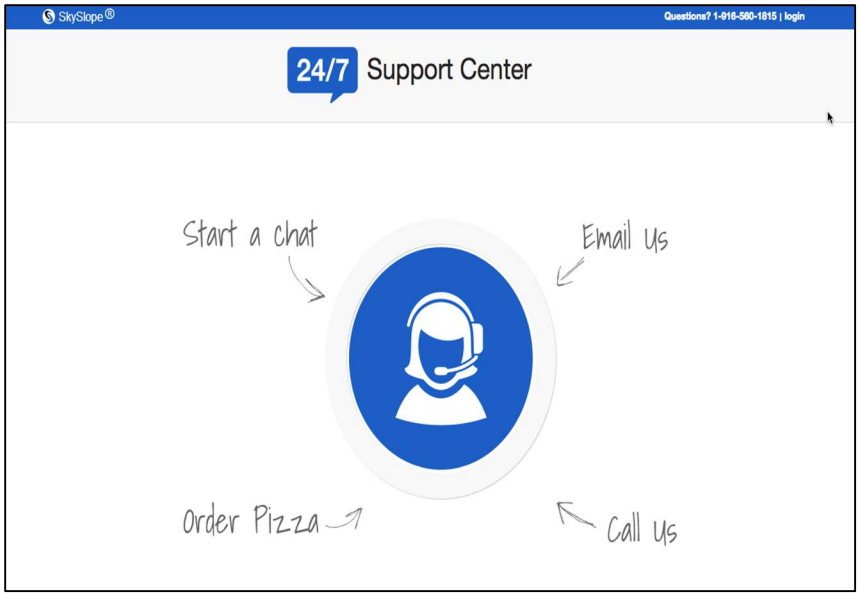
SkySlope Agent Quick Guide

Logging In: From your browser, go to app.skyslope.com and enter your email address and password.

If you forget your password, you can choose “Forgot Password” to receive a link to create a new one.

Contact Support: Contact support 24/7 via email or live chat at support.skyslope.com or directly over the phone at 916-560-1815.

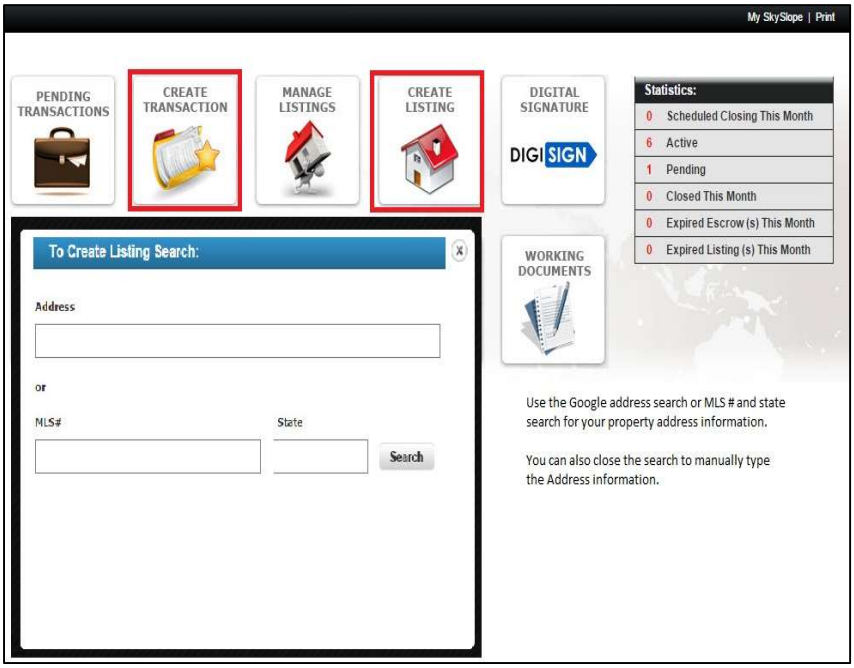


Create a File:

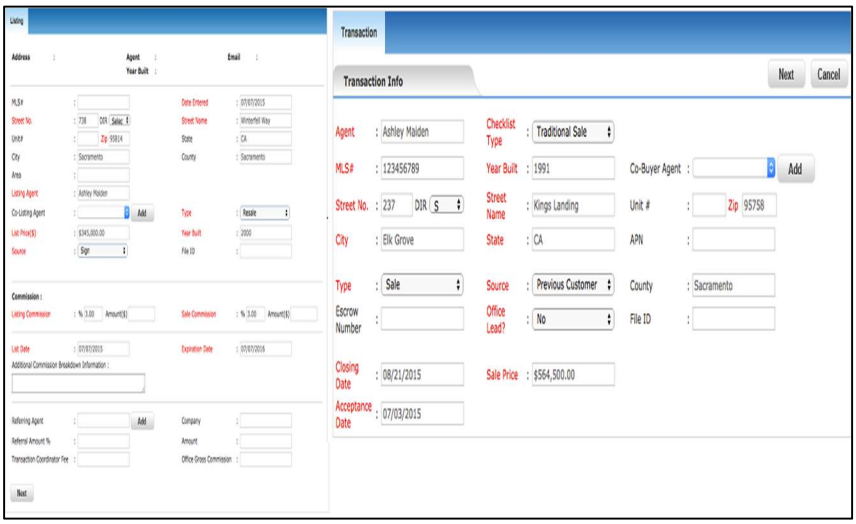
For a deal where you represent the seller, choose “Create Listing.”

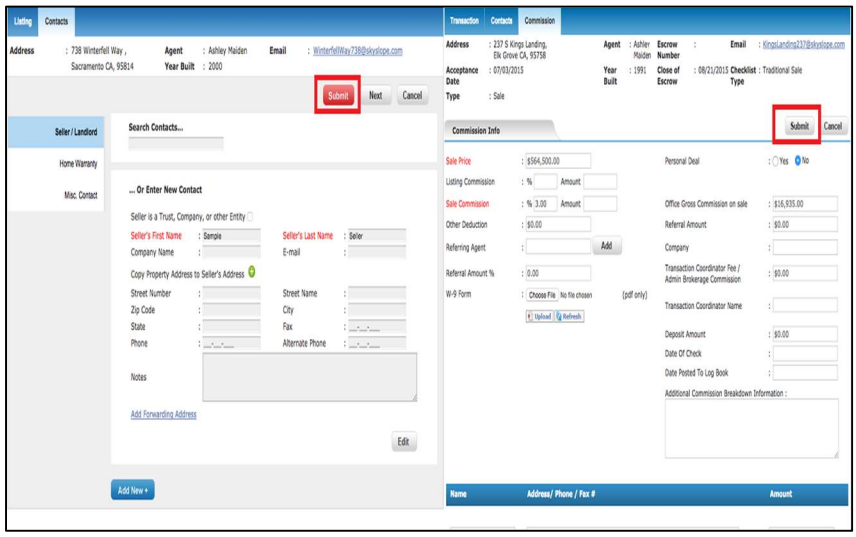
For a deal where you represent the buyer choose “Create Transaction.”

Either option will bring up a search bar where you can search by the MLS or the address search bar to pull in the street address information. You can close the pop up window to enter the information manually.



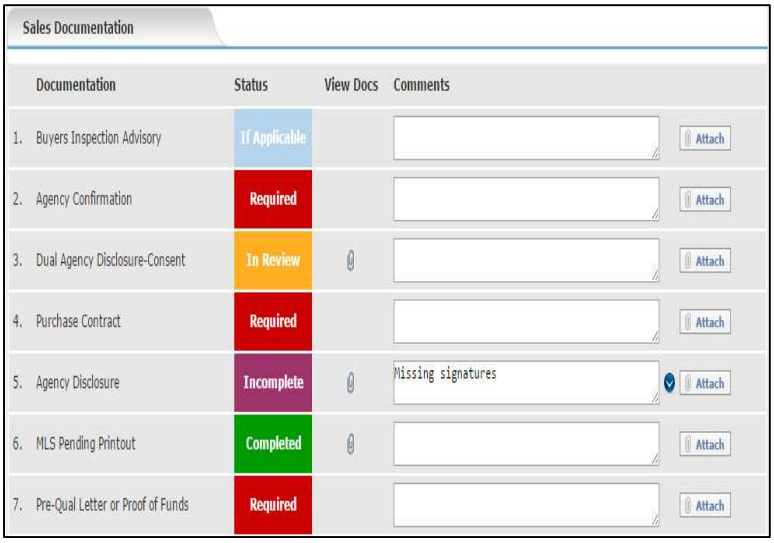
Then, you can enter all file details. Anything in red is required. Once you’ve entered the last of the required data, click “Submit” to get to your checklist.





Checklists:

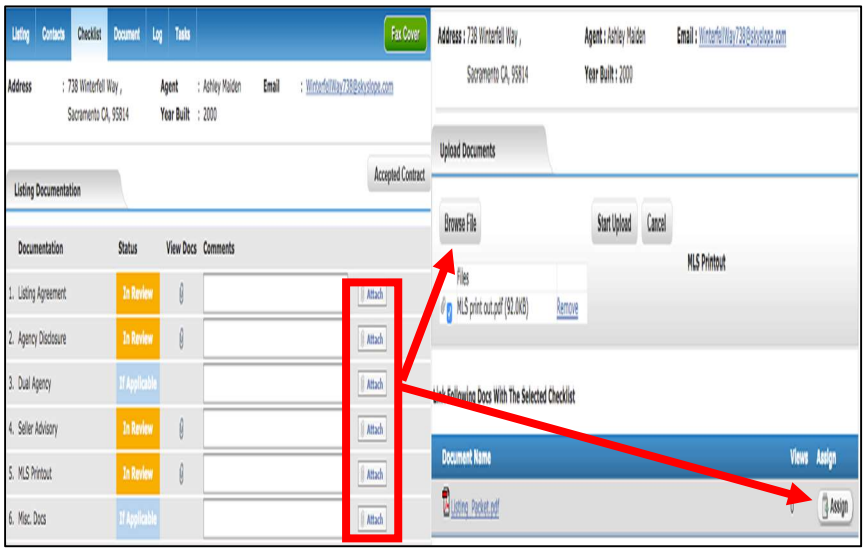
The checklist is the list of required items designated by your office for the type of deal you are entering. Anything that says "**Required**," must be uploaded."Items that are optional will say "**If Applicable**." After you have submitted documents, they will remain "**In Review**" until your office has reviewed the file. If your office admin accepts the documents, they will change to "**Completed**." If a document has been rejected, the item will be "**Incomplete**."



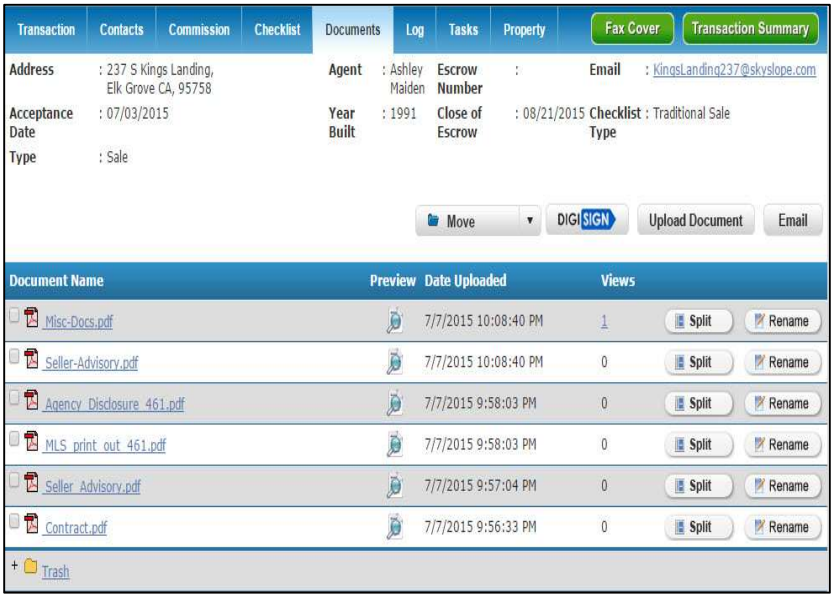
Uploading Documents:

There are four different ways to get documents into SkySlope

1. Email the documents via the property specific email address
2. Upload directly from your computer to the specific checklist spot
3. Upload multiple documents to your "Document" section.
4. Fax

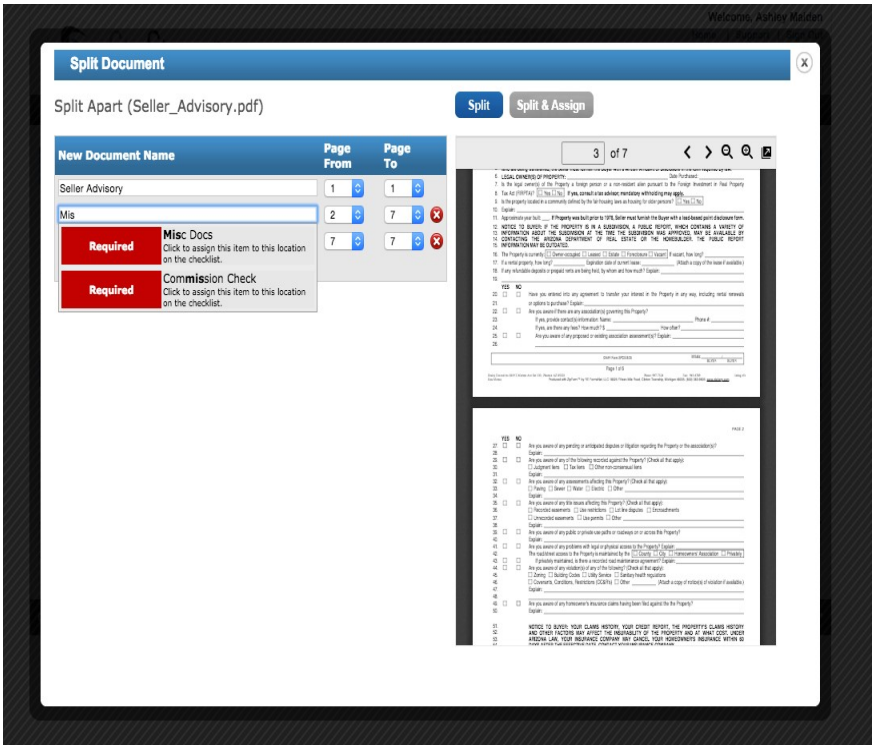


All uploaded documents will appear directly in the “Document” tab of your files. Each document will show the time and date that it was uploaded/received.



Split and Assign:

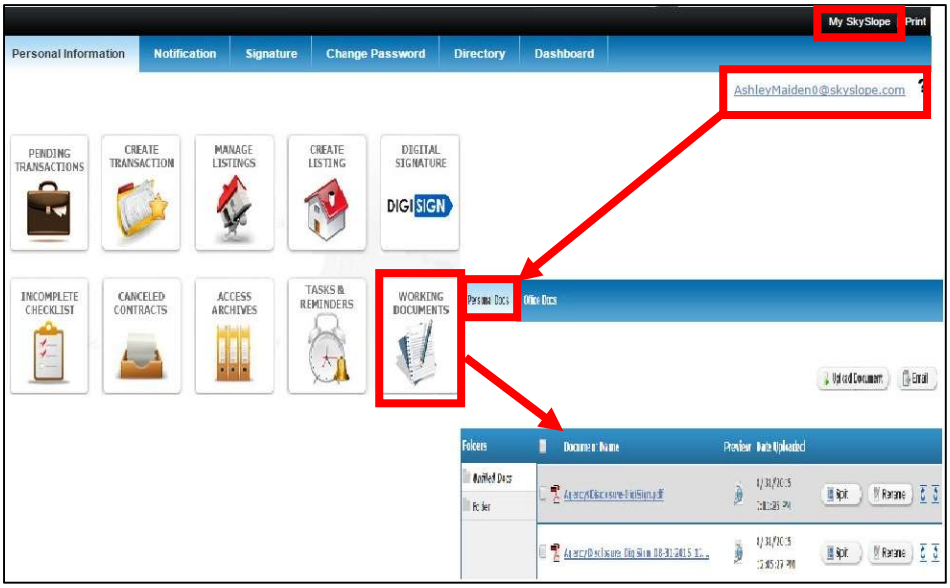
If you have sent in a packet of documents that need to be split, you can use the “Split” option from “Documents” tab. From there you can name each document and indicate the page range. As you name the pages, the split tool will search your checklist for the corresponding items. You can choose your own names for the documents without linking them to the checklist to create new copies as well.



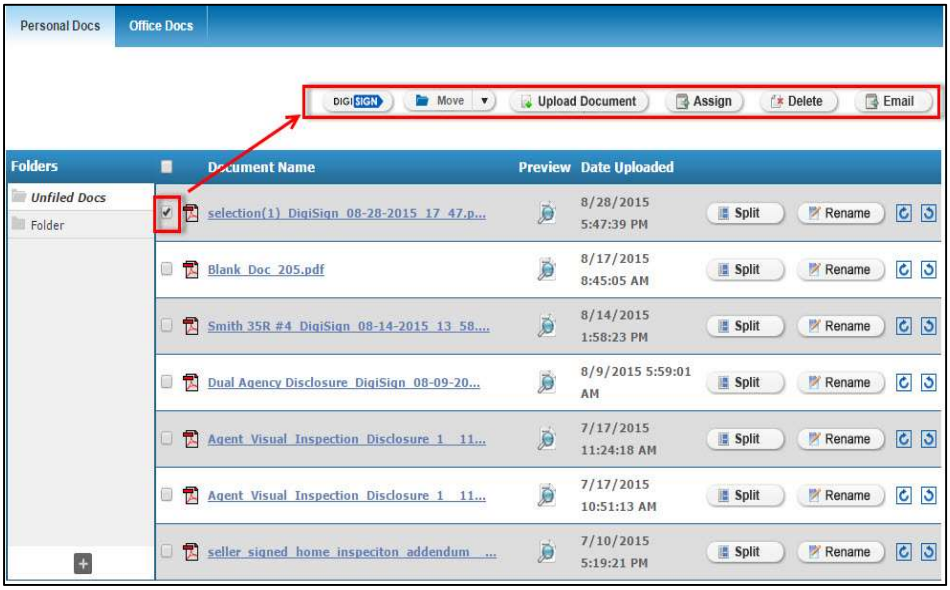
Working Documents:

You can also email directly into your Working Documents.

The email for your Working Documents is found in the My SkySlope area of your account. Emailing there will allow your attachments to be found in Personal Documents.

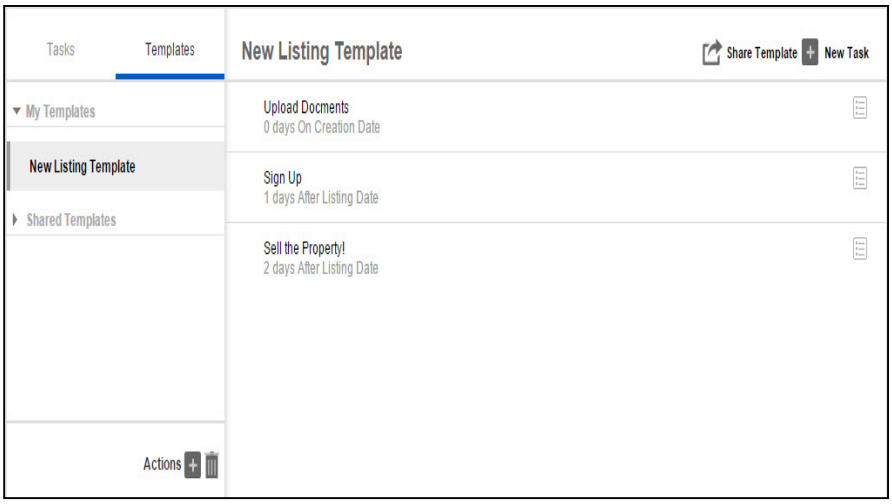


From here, documents can be split, renamed, sent for signatures, moved to a folder, assigned to a file, deleted or emailed

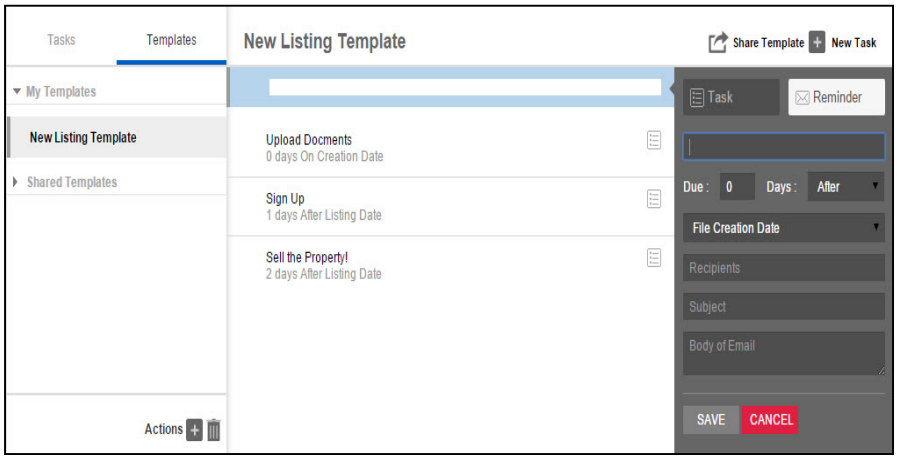


Tasks and Reminders:

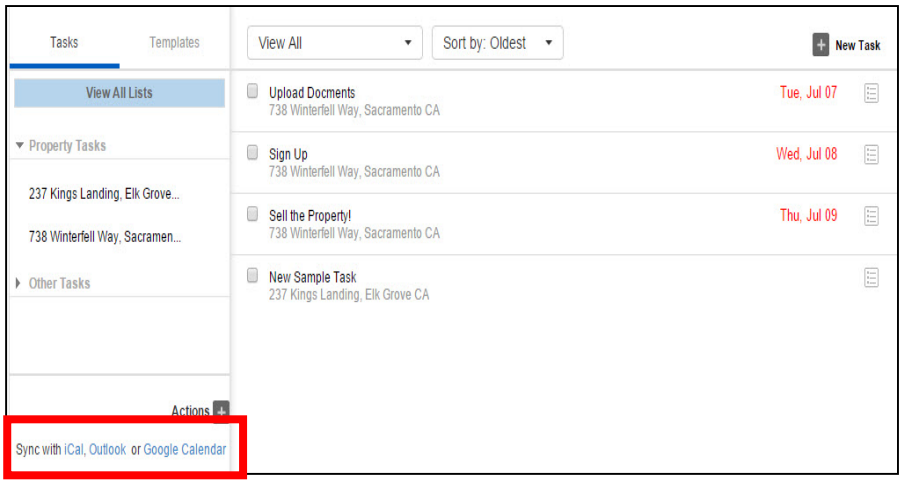
A “Task” is a to-do item that you want to accomplish. This can be made to due on a certain date or based on the rules you create to generate a date in a file.



If you compile a list of tasks to complete, that is called a ‘Template”. Templates can be applied directly to any property file. You will also have the option to create a “Reminder,” which is an email you draft now, but choose to send at a future date.



Tasks and Reminders can be synced to your Google, Outlook or iCal calendars

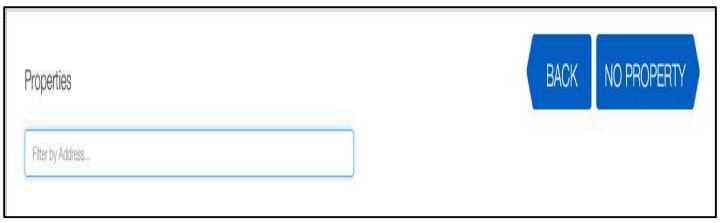


DigiSign:

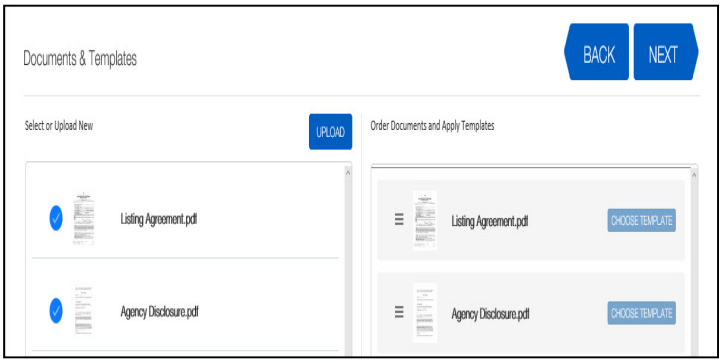
There are three different ways to send a document for signatures. 1) Click DigiSign Directly from your home page. 2) Select a document from a property file and click DigiSign. 3) Select a document from “Working Documents” and select DigiSign.

Step 1: Choose the “New Envelope” option to start a new signing process.

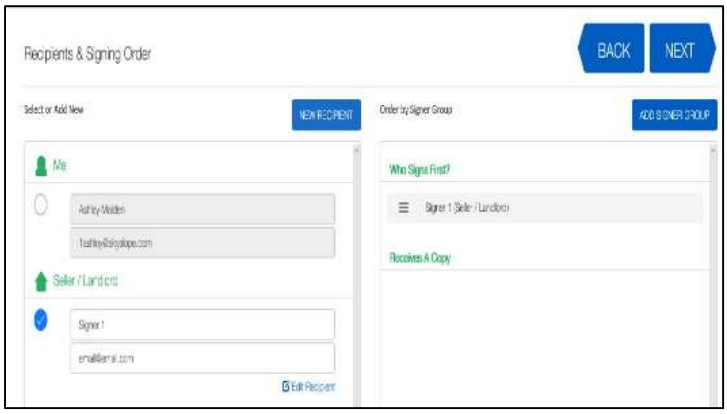
Step 2: Search for an address to connect the signed documents to, or continue without a file.



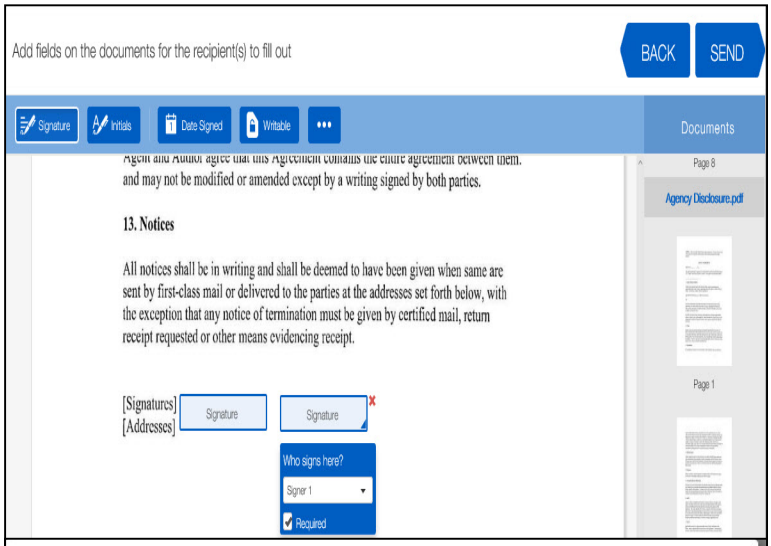
Step 3: **Document Selection.** Choose documents to send out for signatures. If you’ve chosen to work with a property file, you’ll be able to select documents that are in your documents section from this step.



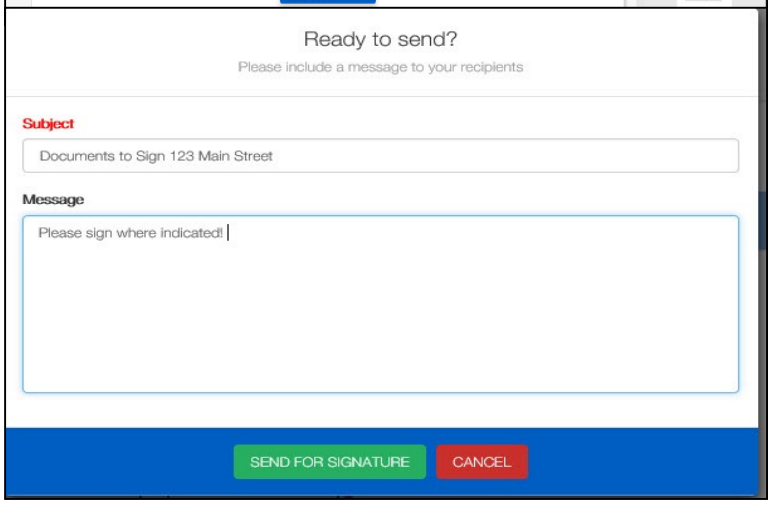
Step 4: **Add Signers**. You can search for a name in your “Directory,” or add the client’s information manually. If you’ve selected a file to work with, each contact will appear in the list. Check the blue box to make sure any applicable names are selected.



Step 5: **Add Signatures**. You can click on the signature, initial, date, etc. to select what you'd like to add. Then, simply click the place you'd like to place the block and select the recipient it belongs to from the drop down.



Step 6: Enter a **Subject** and a message if you would like to add details for the recipients. If you, the agent, are set up as a signer, you'll have the option to sign in DigiSign after selecting "Send For Signature."



As always, if you have any questions, comments or concerns, you can reach out to SkySlope Support by clicking Support in the top right corner of your account, going to support.skyslope.com or calling 916-560-1815.