

## **Help, Login and Security Information, Program Views**

### **1. Help**

- 1.1. See “Help” within Agreement Express and the instructions below.
- 1.2. For assistance contact HKMK Law Corporation, 604.602.9152, [info@hkmk.ca](mailto:info@hkmk.ca) and [www.hkmk.ca](http://www.hkmk.ca).
- 1.3. You can also contact Recombo Support: [Recombo\\_support@recombo.com](mailto:Recombo_support@recombo.com). 1.888.736.2270, 604.638.8464

### **2. Login and Security Information**

- 2.1. Special Service registrants can Login to restricted areas at [www.hkmk.ca](http://www.hkmk.ca) with passwords provided.
- 2.2. Registrants can Login to [www.agreementexpress.net](http://www.agreementexpress.net) with separate passwords.
- 2.3. At Agreement Express Login check the “New” interface (if it still appears).
- 2.4. The first time a person receives an agreement or document for signature and before they can sign they must effectively register by providing security information so that in the future they can login and sign.
- 2.5. User security information is given the first time a user signs (I Accept, create my signature).
- 2.6. In the future the process is abbreviated.
- 2.7. See Managing Users or Setup for information on changing passwords and security questions.
- 2.8. Your username will be your email address and your password will be the one you create.
- 2.9. In cases where there are issues regarding security (e.g. some first-time signers) it is possible to attach an additional Access Code when a document or contract is set up and sent by email for signature (See Below).
- 2.10. At certain times one can check Verify Identity and a third party authentication service (configured at activation) will be used to aid in confirmation of identity at the time of registration. Recipients will be asked to enter additional personal information that will help identify them.

### **3. Program Views**

- 3.1. Generally, the first screen or view that appears after logging in features the Dashboard in the middle and the primary navigation blades at the left. These blades also appear in Agreement Manager (Below).
- 3.2. In most views at the top you have buttons for Send Agreement, Search Subject, Support, Help, Settings and Sign Out. This Send Agreement button really just loads an agreement as part of the Send Agreement process.
- 3.3. In the introductory and Agreement Manager Views the navigation blades are at the left. There are blades for: Folders (all documents or sub folders for groups of documents); Search; Templates; and Manage Users.
- 3.4. If you click on a sub folder or group of documents (Folders), on the Templates blade or after a Search you go to the Agreement Manager or Template Manager Views. You see a list of documents and not the documents.
- 3.5. If you click on a document or template or load a document you go to Document View. The document appears.
- 3.6. In Document View and the new March 2011 interface there are navigation blades at the right side. There are blades for: How to Send a Document; Signatures and Form Tools; Request Additional Documents; Instructions for Signers; Email.
- 3.7. In Document View you prepare documents for signature, send them to signatories, review them and sign them.
- 3.8. In Template Manager a star beside a template brings it up in dashboard. If an asterisk is used the entire company sees it. The Default is that all will show.

### **4. New Interface March 2011**

- 4.1. This Document View interface comes up with documents and templates loaded and set in the new interface.
- 4.2. Navigation blades appear at the right of the document screen that are similar those at the left side in the startup and agreement manager screens.
- 4.3. These blades deal with: 1. How to Send Documents. 2. Signatures and Form Tools (Similar to old rectangular box at left). 3. Request Additional Documents (See Below – not same as adding to existing documents). 4. Instructions for Signers. 5. Email (As old Edit Email – designate signatories and send document to them).
- 4.4. In this new interface instructions appear to guide actions taken with respect to documents on the screen.
- 4.5. The Instruction for Signers instructions can be modified by users. This does not change the Help section.
- 4.6. The list of current companies (not applicable for most users) appears at the top right.