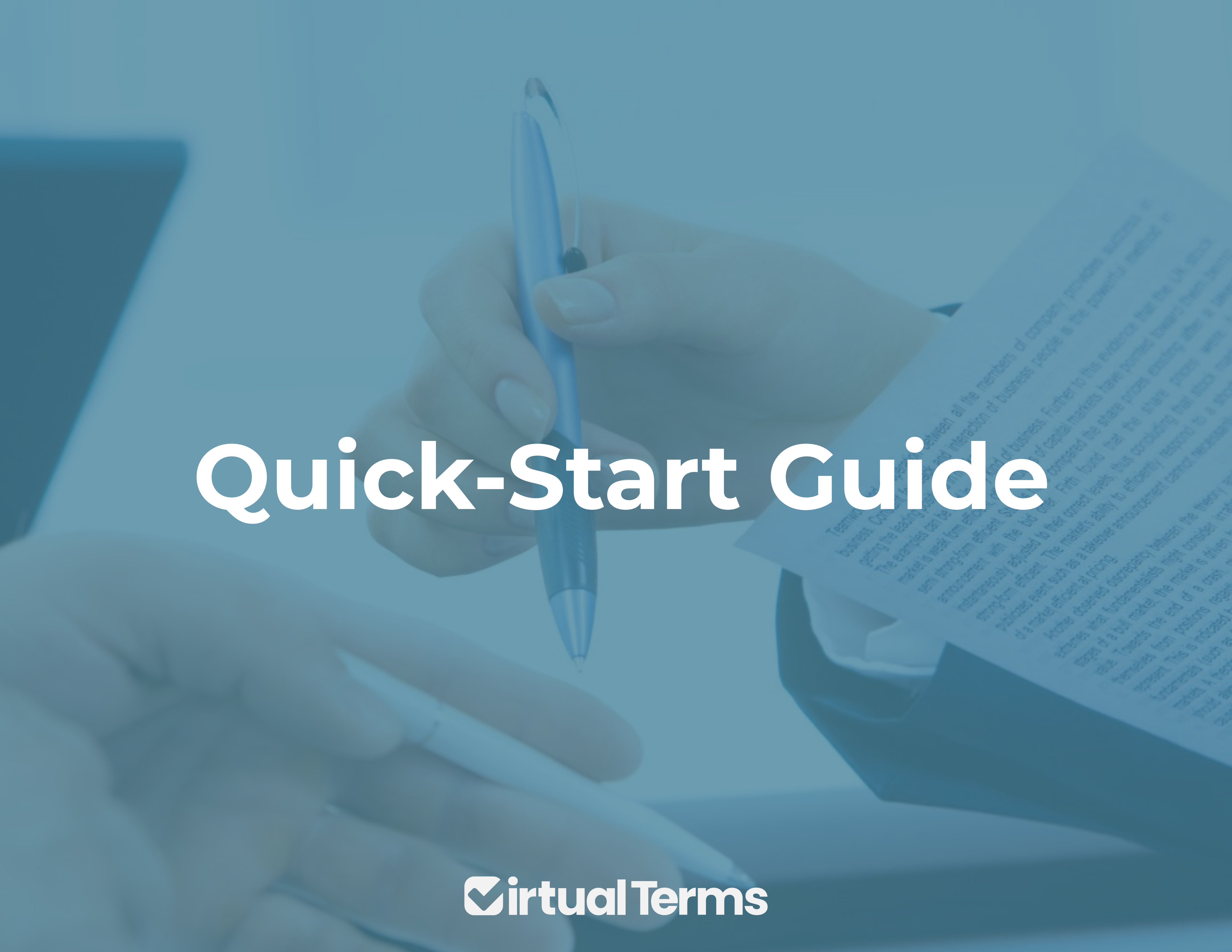


Quick-Start Guide

VirtualTerms

Welcome to VirtualTerms!

Here's Everything You Need to Know

Welcome to VirtualTerms! We're excited to help you create faster, clearer agreements.

We built VirtualTerms to speed up the agreement process while maintaining clarity and professionalism. By focusing on key terms and using plain English, you'll find that reviewing and sending agreements becomes significantly faster.

Creating your first agreement takes just minutes. Just login and our step-by-step process makes it simple. Along the way, you'll find helpful (i) icons throughout the platform that explain each section and provide useful tips to make your experience smoother.

Your Quick-Start Guide

To help you get the most from your account, we've created this quick-start guide. It includes step-by-step walkthroughs of each stage of creating, sending, and signing your agreements, plus helpful tips to know along the way.

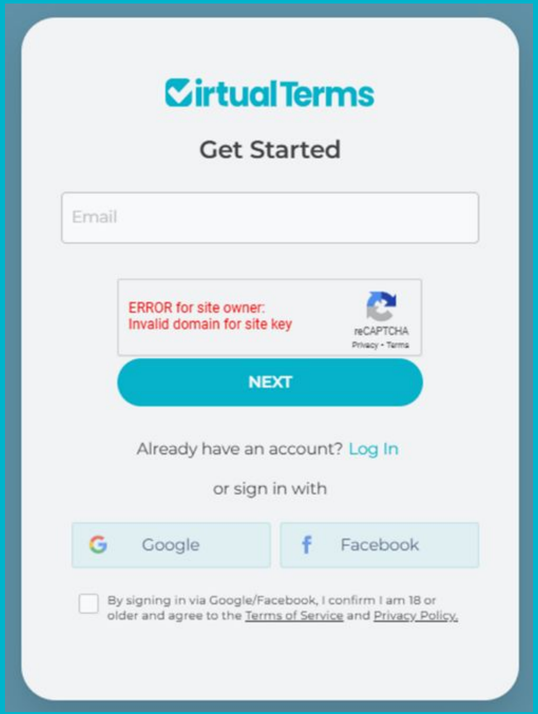
Contents

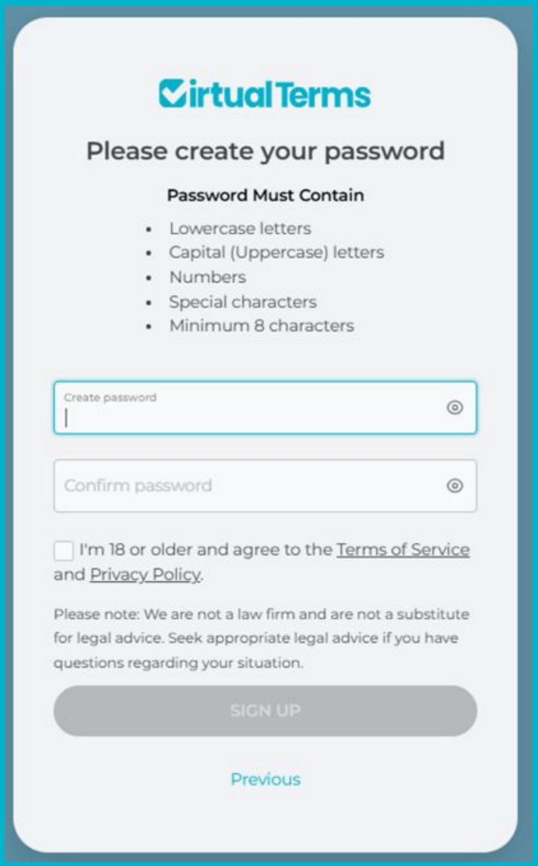
Creating Your Account

Creating Your Account

Creating your account takes just minutes in a few simple steps:

- **Your Email:** Enter the email you want to use for your account.
    - Use the email that you use for the business you will be conducting.
    - Make sure you monitor it - you will receive account notifications.
- **Your Password:** Enter a strong password to use for your account.
    - Your password must meet the requirements.
- **Acknowledgment:** You will then be required to agree to our Terms of Service and Privacy Policy and confirm that you are 18 or older.

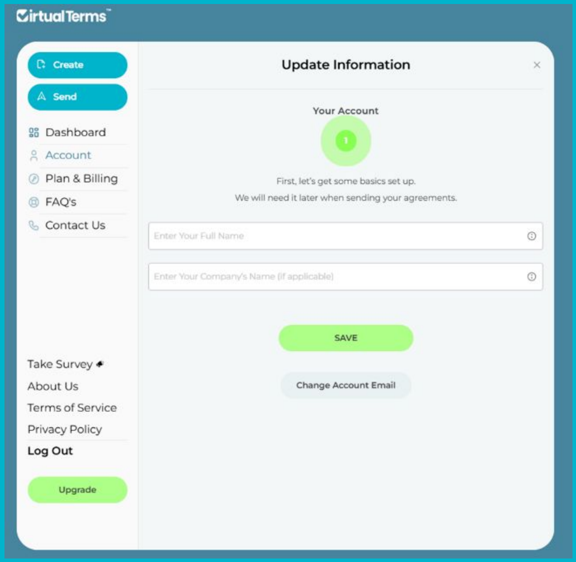




Your Account Info

When creating your account for the first time, you will be prompted to enter some additional information, including:

- **Your Full Name:** Your first and last name.
    - Enter your name as you wish it to appear to recipients of your agreements.
- **Your Company's Name (if applicable):** If your agreements will be in:
    - Your individual name - use your full name.
    - The name of a company or other entity - use the company name.
    - Use the full, correct legal name - it will be used in the agreements.
    - If you have subsidiaries with different company names, you can change the company name for each agreement you create.
- Click Save, and then Next Page.



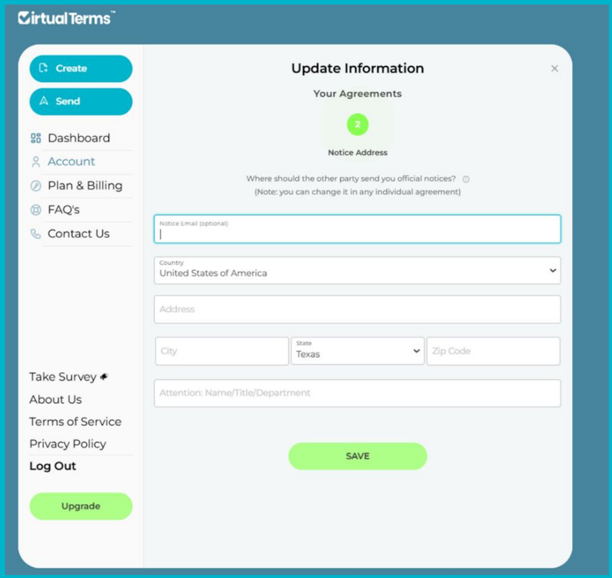
Not seeing this screen? If you do not get this screen right away, refresh your screen.

Need to change your email? If you later need to change your account's email, click **Account** to come back to this page, and select **Change Account Email**.

Your Notice Address

Next, you will be prompted to enter notice address information. Your agreement will include this notice address information. It is where the other party should send you official notices under the agreement.

- **Notice Email** (optional): An email for notices purposes under the agreement.
    - If you do enter an email, make sure it is one you monitor.
- **Notice Address:** The address you wish to use as the notice address, including:
    - **Address:** Country, Address, City, State, and Zip Code
    - **Attention:** You may optionally identify a person, title, or department to whom the other party should address their notices.



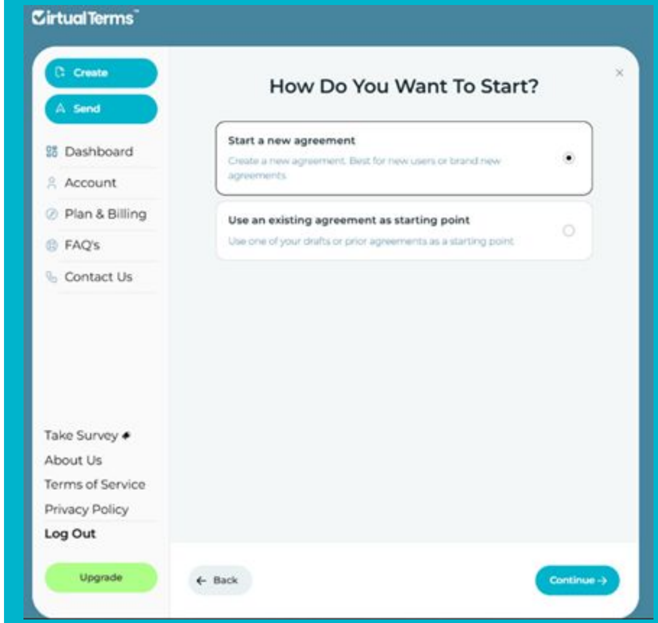
Can I change the notice address for certain agreements? Yes, you can change it later for any particular agreement. Click **Revise Notice Address** when prompted when creating or editing the agreement.

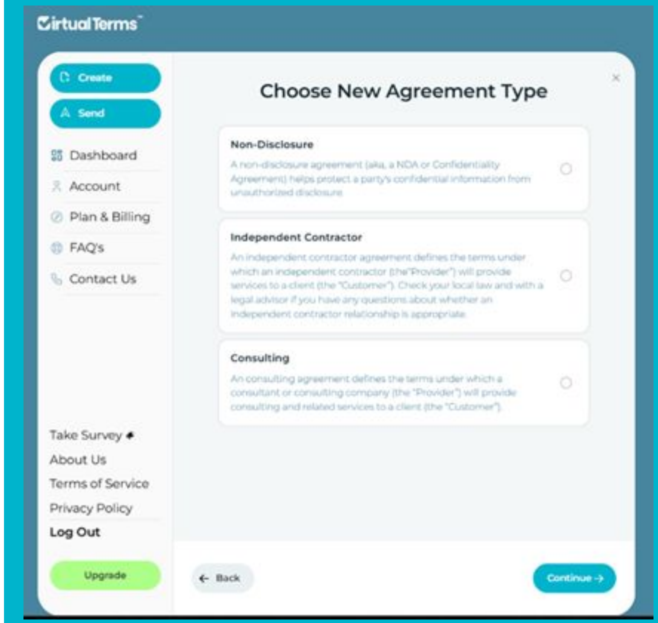
Creating Your First Agreement

Starting Your First Agreement

After completing the account set up, you will be asked “How Do You Want to Start?”

- As a new user, you should click “**Start a new agreement**.”
- Come back here later to create another by clicking the “**<u>Create/Edit</u>**” button.
- Then, on the next page select the type of agreement you want to create.
- If you are unsure if a particular agreement is appropriate for your situation, check your local law and with a legal advisor if you have any questions.

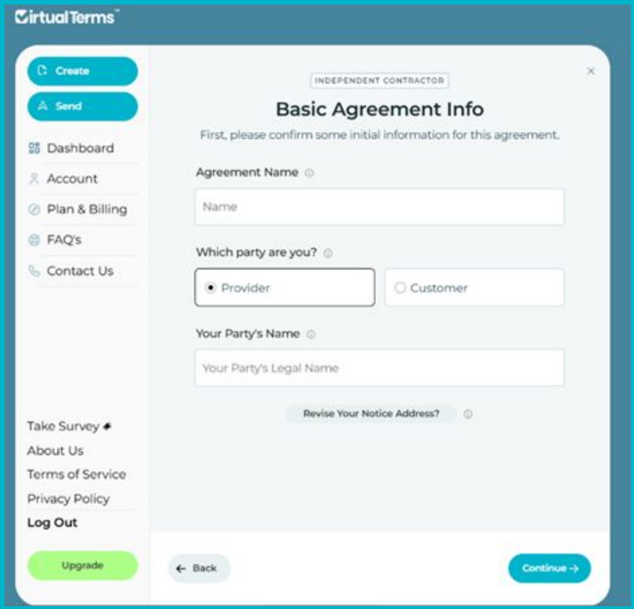




Basic Agreement Info

Then, you'll enter some basic information for that agreement.

- **Agreement Name**: Give the form you are creating a name.
    - Use something you will remember when looking for it.
    - It will not show to the other party to your agreement.
    - Do not duplicate any of your other agreements' names.
- **Which Party Are You?** For agreements other than NDAs, select which party you are. The default key terms for that agreement will be tailored based on which one you select.
    - For example, if you or your company is the consultant in a consulting agreement - select "Provider". Or, if you are the client - select "Customer".
- **Your Party's Name**: We've pre-populated this with either your name or your company name. But you can change it here for this agreement.
- **Your Notice Address**: We've pre-populated this from your account info. To change it for this agreement, click "Revise Your Notice Address."
- Then, click <u>**Continue**</u>.



Reviewing Key Terms

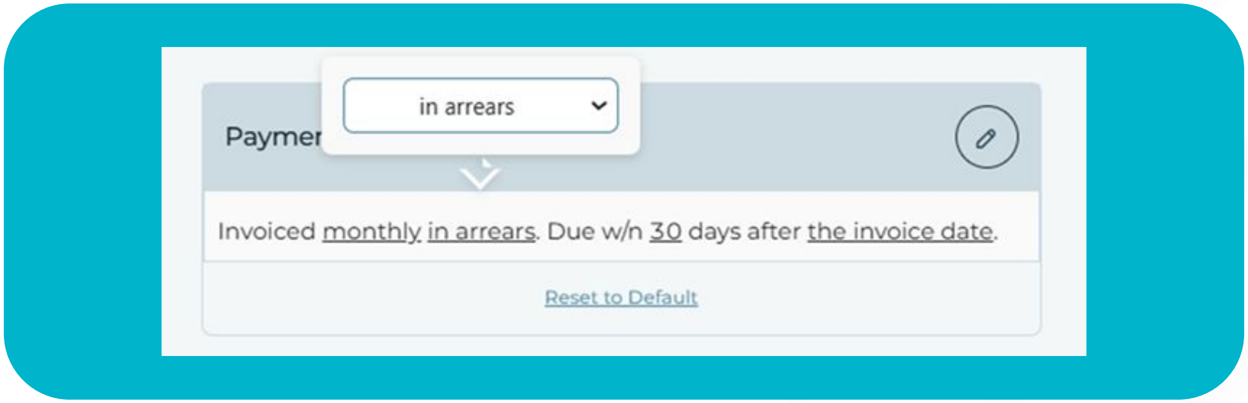
Next, we will walk you through each key term of the agreement. You will be able to review and revise them as you go.

- For some, you must enter information (e.g., describe your services or fees).
- In other cases, we've pre-populated the key terms with default provisions.
- For the default provisions:
  - We've included provisions common for that type of agreement.
  - But, depending on the agreement type, we've tailored the default terms based on whether you selected that you are the Customer or the Provider.
- You can modify the default terms as set forth below.

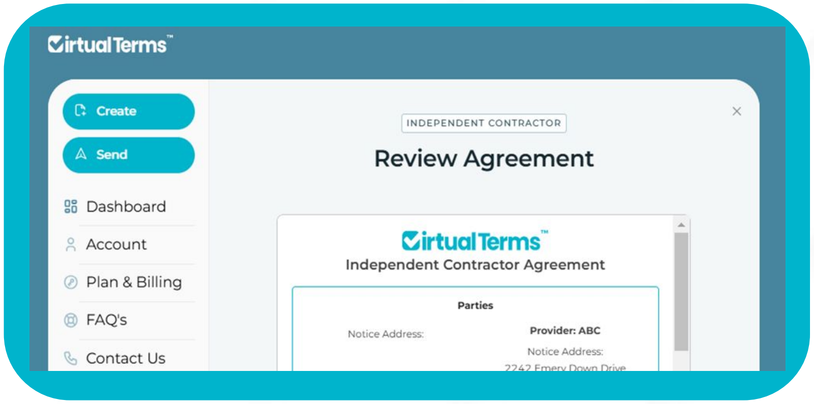
Modifying Key Terms

For each Key Term provision, you can further revise them. There are two ways to do so:

- **Drop Downs:** Click on the underlined text to get a list of options. Click on any option you wish to select. In some cases, you can enter custom text
- **Editing Text Boxes**: Click the button next to the Edit/Pencil icon to enable editing. You can type, cut and paste, etc. and use basic formatting tools.
- It will automatically save as you go.
- Don’t like what you did? Click “Reset to Default” to reset to our default language.



Review



Once you're good with the Key Terms:

- Click **Continue.**
- You'll be taken to the **Review** screen to double check it.
- You can also review the full VirtualTerms Standard Terms by clicking on the **Standard Terms** link at the bottom.

Ready to Send?

If you're ready to send it:

- Click **Ready to Send**.
- You'll be taken to the Send screen. See Sending Your Agreement below.

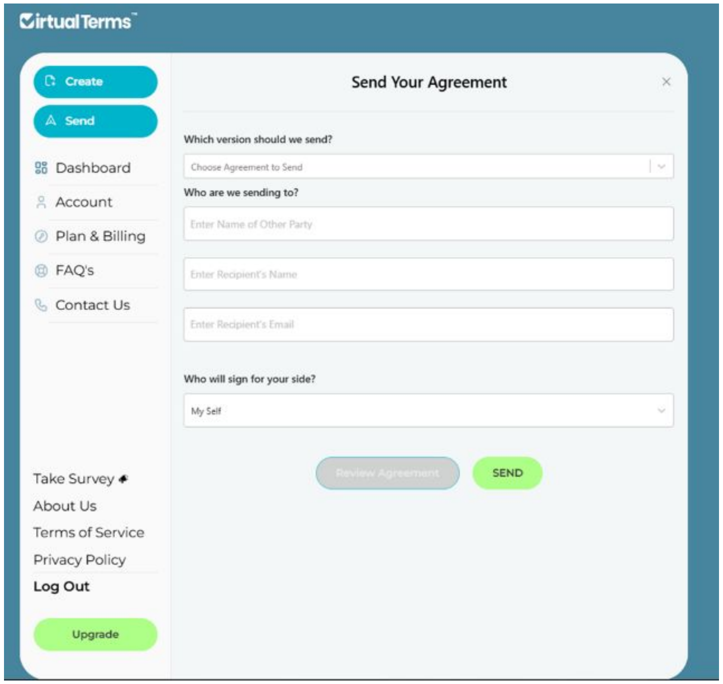
What if I need to stop or I'm not ready to send?

If any time, if you need to stop or if you're not ready to send the agreement yet:

- You can click the "X" to close it (or any other button). Your draft will be saved.
- You can come back to work with your draft in a few ways:
  - Go to your Dashboard to find your draft.
  - Click Create/Edit, then Choose From Existing Agreement to find your draft.
  - You can edit (or copy & edit) from there. See Editing Your Agreement.
  - Click Send to go to the Send screen, pick your agreement, and send it. See Sending Your Agreement below for more.

Sending Your Agreement

Sending Your Agreement



Once you are ready to send your agreement, either click Ready to Send at the end of the Create/Edit screens or Send in the upper left navigation bar.

Sending Your Agreement (Cont.)

Select Agreement. On the Send screen, select the agreement you want to send.

- *Note*: If you've sent the agreement before, you will be asked if you want to:
    - Send the existing agreement to a new recipient (which will replace what you sent before), or
    - Send a new agreement to another person (which will create a cloned agreement with a revised agreement name and send it to a new person).

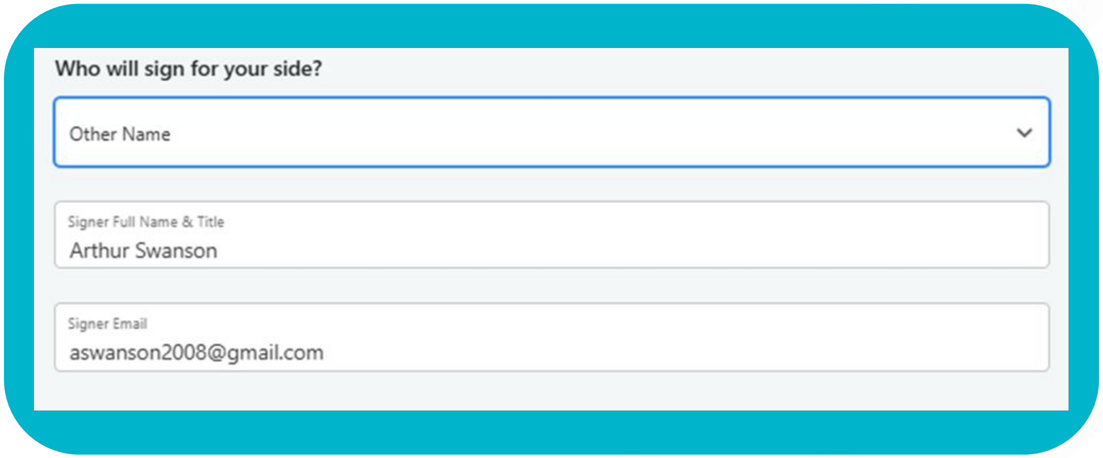
Other Party & Recipient. Next, let us know who we are sending it to by entering:

- **Name of the Other Party:** The full name of the other party to the agreement.
    - ***What if I don't know their correct name?*** If you don't know their exact name (i.e., XYZ Inc. or XYZ LLC), they will be able to correct (which you'll be notified of). They will also input their notice address so you don't have to.
- **Recipient's Name:** The person that will review and/or sign for them.
    - **What if they may not be the signer?** If you are not sure that they will be the signer, they will be able to forward it to their correct review/signer (and, if they do so via our Forward function, you will be notified).
- **Recipient's Email**: The email to whom you are sending it.

Sending Your Agreement (Cont.)

Your Signatory. After you've input the recipient's info:

- Select whether you or someone else in your organization will be the person signing for your side.
  - By default, you are set to be the signer.
  - To identify a different signer for your side:
    - Click the drop down and "**Other Name**"
    - Enter their full name, title, and email.
    - After the other side signs, this person will receive the agreement to review and sign for your side.



Sending Your Agreement (Cont.)

Review Agreement. Before sending it:

- You can review it by clicking **Review Agreement**.

Send. If good to go:

- Click **Send**.
- You can then send another or go to your **Dashboard**, where you'll see your agreement in Sent status.

What if I'm not ready to send it? If you're not ready to send it yet:

- You can click the "X" to close that agreement (or click any other button).
- Your draft will be saved. You can then either come back to:
  - Edit it (see Editing Your Agreement below).
  - Send it (by clicking Send and picking that agreement to send it).

Reviewing & Signing Your Agreement

Review Email

Email to Recipient. Once you send your agreement, we will email the recipient a link to the agreement on VirtualTerms.

- The email explains that you sent it, provides the parties' names, and asks them to review and sign.
- If the email was undeliverable due to an incorrect email, we will notifying you via email.

The recipient can either click to **Review & Sign** or on the button to **Forward** it to another person to review and/sign.

Forwarding: If the recipient clicks Forward:

- They must input the company name, individual name, and email of the person to whom they are forwarding it.
- We will send a similar email to the forwardee explaining who originally sent it and who is forwarding it.
- Your Dashboard will also have a small (i) button by that agreement. By clicking it, you will see if and to whom it was forwarded.

Reviewing Your Agreement

After clicking to **Review & Sign**, the recipient then:

- **Enters Basic Information:**
  - **Name & Address.** Checks their full legal name.
  - **Notice Address.** Inputs their official notice address.
  - **Final Agreement Email.** Provides an email to whom we will send the final pdf.
  - **Terms Acknowledgment**. Clicks to agree to our Terms of Service and Privacy Policy and that they are 18 or older. They do not, however, have to have a VirtualTerms account.
- **Key Terms**. Reviews the key terms of your agreement. They are not able to change them. But they can provide comments as provided below.
- **Standard Terms**. Can click to review the full VirtualTerms Standard Terms.
- **Comments.** Can send you comments by clicking the Comment button, adding their comments in the text box, and clicking send. If they do send comments:
  - We will send you an email notifying you of the comments.
  - Your Dashboard link will have a red notification dot.
  - The agreement on your Dashboard will show:
    - "Needs Response" status flag
    - Comment bubble icon – click on it to review the comment

Signing Your Agreement

If they do not have comments, they click **Next**.

- A signature screen shows the type of agreement and the parties' names.
- By clicking the **Preview**, they can again see the full key terms with a link to the full VirtualTerms Standard Terms.
- To sign, the person signing:
  - types to sign their name in script,
  - enters their full individual name, title (if appliable), and email,
  - clicks to agree to sign electronically, and
  - hits **Complete**.

Your Turn to Review & Sign

After the other side signs:

- Your Dashboard will show that agreement's status as "**Sign Now**."
- We will email you (or your designated signer) with a similar email and link to the agreement to review and sign.
- Your side's signer reviews and sign using similar screens as the other side's signer, except:
    - Your signer does not need to update their name or notice address.
    - Your signer cannot provide comments within the application. If they have questions or comments, they can always email you directly before they sign.

Your Dashboard

Your Dashboard

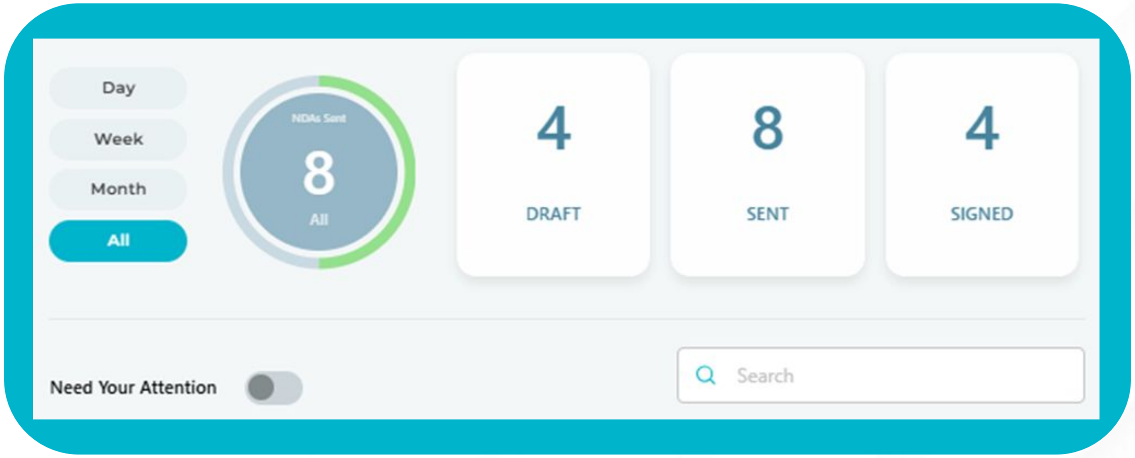
Your Dashboard is where you can see it all. Track your draft, pending, and signed agreements in one place. Here’s an overview.

Navigating Your Agreements

At the top of your Dashboard, there are several features to help you find and manage your agreements.

- **Date Filter**. Adjust to view agreements by day, week, month or all.
- **Agreement Counter**. Tracks the number of draft, sent, and signed agreements (based on the date filter selected).
- **Need Your Attention Filter.** Filter to agreements that are back in your court (i.e., you received comments or it's your side’s turn to sign).
    - You will also see notification alerts on your Dashboard link. 

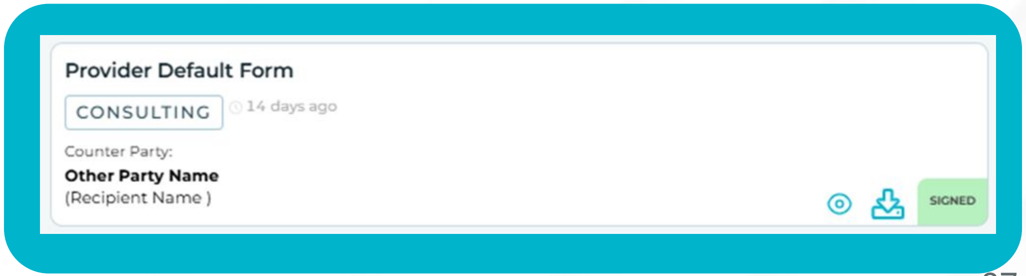
    - Look for the agreements with a Needs Response or Sign Now status.
- **Search**. Search by agreement name or party name.



Your Dashboard (Continued)

Agreement List: Your agreements are listed with the most recent at the top. For each agreement, you'll see:

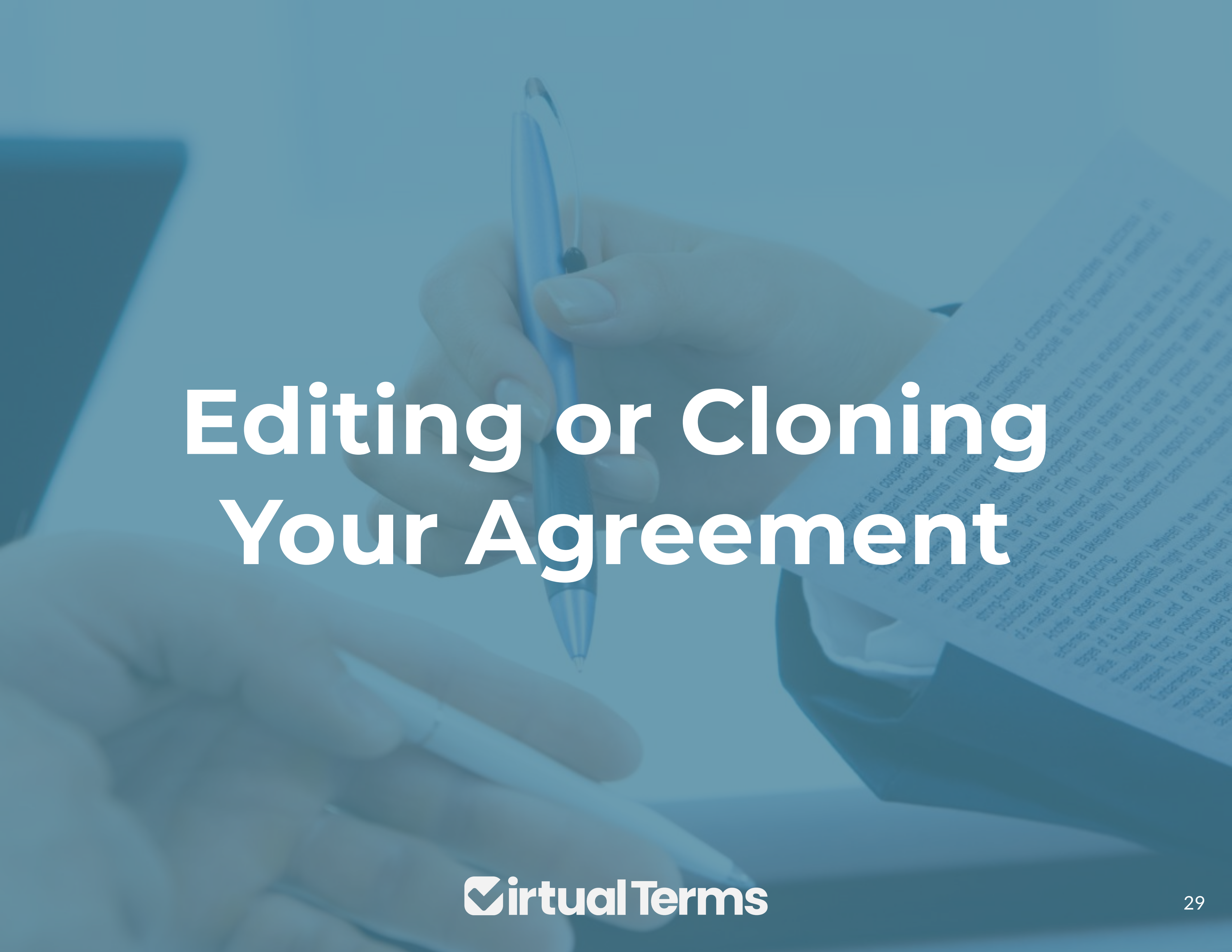
- **Agreement Name.** The name you gave to this agreement when you created it.
- **Type of Agreement.** The type of agreement (i.e., NDA, Consulting, etc.)
- **Last Modified Date**
- **Counterparty's Name**. The name of the other side to the agreement (as updated by the other party after they review it).
- **Recipient's Name.** The name of the person you sent it to for review.
- **Status Flag**. A status flag for each agreement. Those statuses include:
    - **Draft**: You've started it but have not completed or sent it.
    - **Draft Complete**: You've created and completed it but have not sent it.
    - **Sent**. You've sent it, but they haven't signed yet.
    - **Sign Now:** They've signed, and it's your side's turn to sign.
    - **Signed**: Both parties have signed.
- **Info Button.** You may also see an (i) button. Hover over it to show whether the other side updated their party name or forwarded it for another person's review. Click on the pop-up for further information.



Your Dashboard (Continued)

Dashboard Actions. Your agreement in the Dashboard may show various icons. Here's what you can do by clicking on each one.

- **Preview**: View the key terms of the agreement. At the bottom, you can click the link and view the VirtualTerms Standard Terms that apply to it.
- **Copy & Edit:** Use this if you want to base a new agreement off of a pre-existing agreement, but preserve the original. See Editing Your Agreement for more.
- **Edit:** Use this if you want to make edits and overwrite the prior version. See Editing Your Agreement for more.
- **Comments**: View comments sent by the other party.
- **Delete**: Delete an agreement in Draft, Draft Complete, Sent, or Needs Response status. You can't delete it if either party has signed.
- **Sign Now**: Click the Sign Now status flag or icon to review and sign once the other party has signed.
- **Download**: Download a .pdf copy of the fully signed agreement. We will also have emailed you and the other side a .pdf copy.



Editing or Cloning Your Agreement

Editing or Cloning Your Agreement

There are two ways to edit or make new agreements based off of your existing ones.

From Your Dashboard: On your Dashboard, click the **Copy & Edit** or the **Edit** icon:

- **Copy & Edit**: Use this if you want to base a new agreement off of a pre-existing agreement, but preserve the original. You will need to give the new agreement a new name.
- **Edit**: Use this if you want to make edits and overwrite the prior version.

Please note: You will not be able to Copy & Edit or Edit an agreement that has already been signed by either party. Instead, use the Create/Edit function outlined below.

See the next page for how to do so from the Create/Edit page.

Editing or Cloning Your Agreement (Cont.)

Using the Create/Edit Button. Or to clone or edit an agreement:

- First, click the **Create/Edit** button in the top left navigation.
- Then, select "**Use an existing agreement as starting point**" and "**Continue**".
- Next, select the agreement by clicking the radial button.
  - To help find the right one: Filter by Agreement Type and/or Status at the top or click the Preview icon to check if it's the right one.
- After selecting the right one, scroll to the bottom and select either:
  - **Clone It**. Use this if you want to base a new agreement off of a pre-existing agreement, but preserve the original.
  - **Edit**. Use this if you want to make edits and overwrite the prior version.
  - Note: You can't Edit an agreement that has already been signed by either party (but you can Clone it and edit it from there).

To edit it, simply modify the existing key terms (like when creating a new agreement).

Questions or Feedback

VirtualTerms

Questions or Feedback

Don’t forget - if you have questions or issues along the way, we're here to help:

- Use our live chat while on the site during business hours
- Email us anytime at contact@virtualterms.com
- Check our FAQs at www.virtualterms.com/faq

Also, send your suggestions. We're always improving based on user feedback.

Thank you for choosing VirtualTerms. We're committed to making your agreement process as smooth and efficient as possible.