

SERVICE DESCRIPTION

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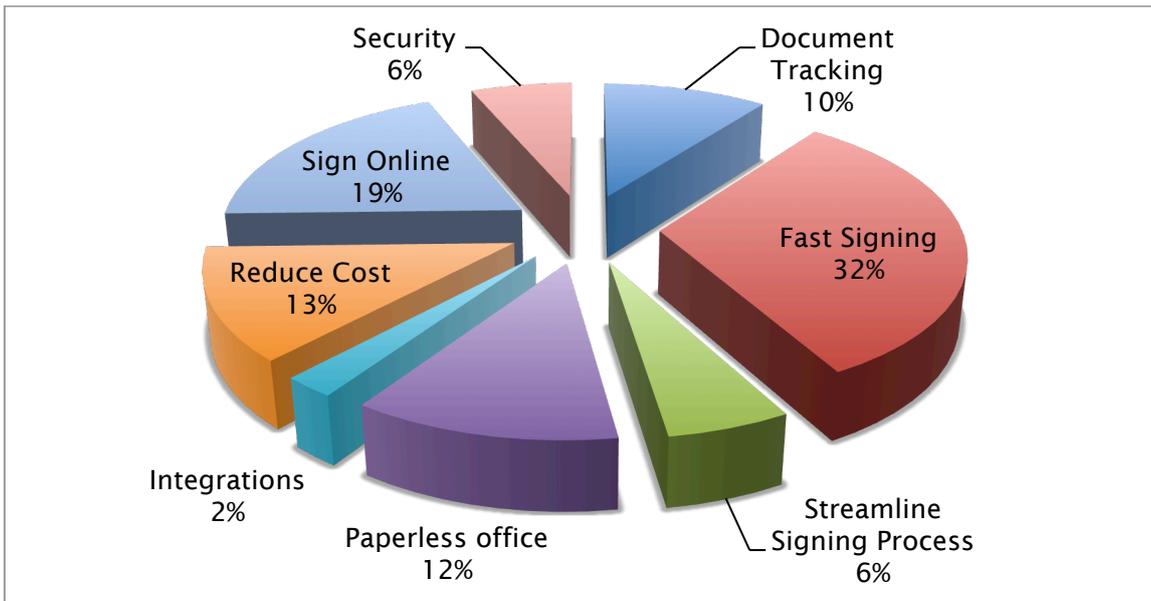
Overview

Legalesign is an online electronic signature and document storage platform. Businesses send and manage their contracts through the system while their clients sign their contracts online.

The platform is a productivity tool that adds value by cutting direct costs, such as paper, improving efficiency by centralizing and streamlining the signing process in an organizational context, and creating an improved end-customer experience with the convenience of online signing (removing the need for signers to print, sign, scan and enabling them to sign immediately from anywhere).

Legalesign is cloud-based and accessible through a website and an application programming interface (API).

The pie chart below show the main reasons why people use Legalesign:



The website has two sections, i) a management and administrative section for uploading, editing, sending and storing documents with features including branding, bulk send and user permissions, and ii) a signing website with responsive HTML for document signing and execution on desktop, tablet and mobile.

The API provides programmatic access to the functions of the platform. It is typically used to integrate with in-house software, and/or where firms need a high volume of transactions. The API is RESTful using the https protocol and its documentation can be found at: <http://apidocs.legalesign.com/>

Using the service

Trial

The platform can be tested with a free trial. Visit <https://legalesign.com> and there is a trial sign up on the front page; enter your email then follow a short validation process to sign in and test the website. In the trial an API key can be generated to test out API functionality.

Videos illustrating aspects of the site can be found at:

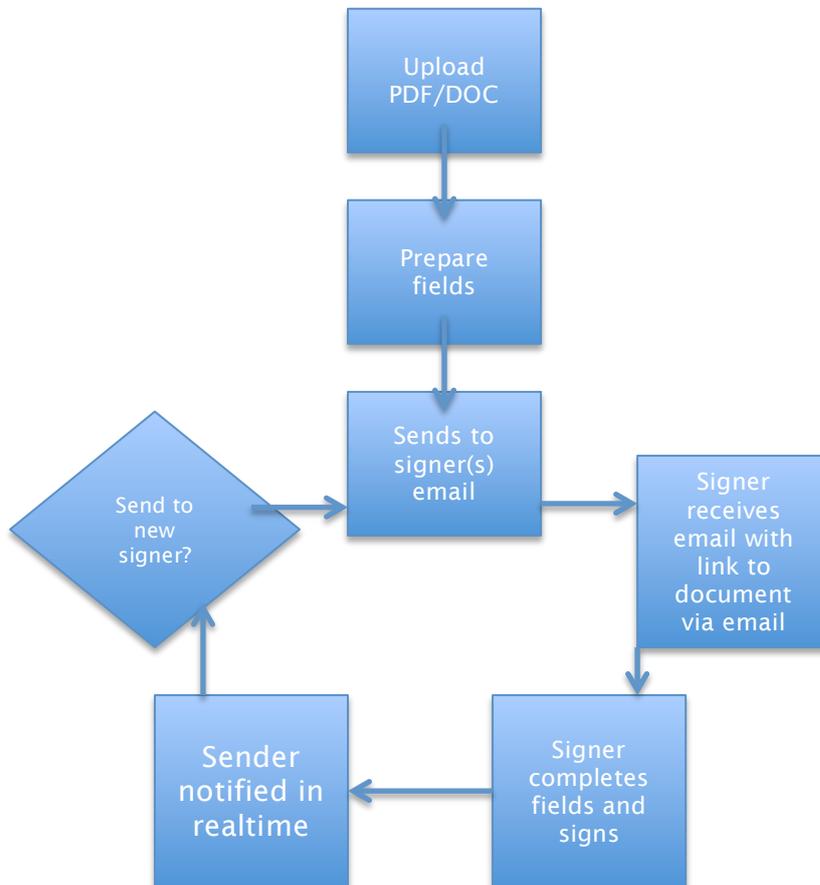
<https://support.legalesign.com/932706-Videos>

And a full overview video can be found at:

<https://support.legalesign.com/092787-Overview---how-to-use-Legalesign>

Typical usage

The flowchart below describes a typical process in Legalesign. Ideally documents are uploaded and re-used by using fields to complete custom details for different signers.



Legalesign includes full form filling functionality for both senders (in order to customize the document when sending it), and for signers.

By re-using documents administrators can rapidly send existing contracts to new signers. But firms that have more bespoke documents for each signer sometimes upload a new PDF for each new contract that will go to a signer.

Another possible use-case is where you don't know your signer details in advance. Legalesign has an 'embed' or 'open document' function. An example of this might be registrations for a sporting event.

In the 'open document' scenario, you upload your document and add form fields for a signer to write their name and email and add a signature box. Legalesign will then provide a web address you can broadcast for any new signers or which can be embedded in another website.

API users can have fine grained control and can either create documents based on the flow chart above or can create custom documents which can also be embedded in another website.

Legalesign 'teams' and permissions

When you set up an account in Legalesign you will create a 'team'. This is an isolated container for everything that happens on the platform.

In order to effectively scale the platform through a larger organisation, or to silo different sets of users, perhaps by department or office, multiple teams can be created. Teams are logically isolated from each other. But team networking functions can be used to create a 'parent/child' hierarchy: a parent group will have visibility over the activity of child groups.

Teams can be used to silo users according to their functions or activities. But within each team are also multiple permission levels.

Legalesign permissions:

- Administrator – full access
- Create and send – (team user)
- Create and send – (individual user)
- Send only – (team user)
- Send only – (individual user)
- Read only

A 'Team User' is allowed to view all sent documents within the team, while an 'Individual User' can only see their own sent documents. If you have a network of sales agents for example, you might wish for each of them to be 'individual users', but your staff at HQ may be 'team users' so they can see all of those agents' activity.

Support and Training

Our customers consistently give us high scores for support, and many customers come to us after poor support experiences with others (please see Appendix II: online reviews).

Support is considered one of Legalesign's core services. Most support is available via email, our average response time is within half an hour but we aim to respond to all issues within 12 hours.

We also provide support packages based on requirements from individual companies. Typically custom support packages are requested by companies with high volume transactions and where 24 hour coverage or fast response is required.

The system is innately designed to be easy to use so that colleagues can train one another in a few moments. Usually training takes place between a Legalesign account executive and a key representative (or group) over the phone or via webinar, who then is able to train others in the firm in the use of the platform. Legalesign provides up to 3 hours webinar/phone training at the outset.

Support articles can be found at: <https://support.legalesign.com>

Fair use

Fair use policy indicates the expected activity of a human and is designed to guard against the use of automated scripts or abuse where pricing is done on a per user basis. Fair use does not apply to API which is priced usually on a per document usage. Our fair use is currently set at 250 documents/month per user. This may be changed in the near future to an average of 30% more than average user activity over a quarterly period (or similar).

Data retention

Data is kept for up to seven years. After that period we will contact you to request whether you wish the data to be destroyed. If we cannot contact you or any representative from your company with reasonable efforts the data will be destroyed. If you wish to keep the data there will be a fee for a further seven year storage.

Availability

Legalesign is designed for high availability. At 18 Feb 2016, uptime for the past 12 months has been 99.9229%. Downtime has been one incident of 3 hours for scheduled downtime and 2 hours 45 minutes of unscheduled downtime. Unscheduled downtime has been a result of a schedule downtime overrun (2 hours) and a short notice (45 minutes) update. In all cases downtime has been during off peak hours. We do not guarantee availability, for specific service level (SLA) agreements please contact us.

Security

Legalesign is ISO27001 certified for information security. All connections are https encrypted and our SSL encryption is A+ rated by Qualys.

Accounts include additional security features:

- Two factor authentication
- Require password reset after a given amount of time
- Require harder password strength from users

At the server level we have a host of security tools and methodologies for example, intrusion monitoring and integrity checking, scans and file encryption, frequent updates,

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vulnerability testing, and counter measures for attacks on password. Access is strictly limited and controlled. Overall, security is an on-going activity that is taken seriously at every level in the company.

“Legalesign’s customer support really is a godsend, any time we have a problem we speak to customer service and before you know it the problem is solved”

Michael Lewin Solicitors

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Appendix I: List of features

- Upload PDF/Doc (PDF recommended)
- Certified PDF when signed
- Real-time listing via latest/timeline
- Audit logs
- Forms functionality
- Two factor authentication
- Force password renewal
- Force complex passwords
- Visit and signed email notifications
- Email branding
- Use own SMTP for emails
- Logo on signing pages
- Custom email text/subject lines
- Automated reminder emails
- One or multiple signers per document
- Schedule document sending
- Send multiple documents to one signer (or multiple sets of the same signers)
- Send to signers simultaneously or in sequence (signer 2 signs only after signer 1)
- CC signed email notifications
- Select signing methods
- Multiple user permission levels
- Teams/groups (containers for all Legalesign functions) to scale the system through an organization
- Team networking functions to create a team hierarchy for multi-team overview
- Bulk send with CSV upload
- API access
- Callbacks via https

Appendix II: Customer reviews

G2Crowd:

<https://www.g2crowd.com/products/legalesign/reviews>

Capterra:

<http://www.capterra.com/digital-signature-software/spotlight/143821/Legalesign/Legalesign#reviews>

GetApp:

<https://www.getapp.com/operations-management-software/a/legalesign/reviews/>

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