tmGroup

tmSign Dashboard

Onboarding Guide

This guide covers onboarding and how to use the tmSign Dashboard.

Follow each step carefully to ensure a smooth experience.

Glossary of Terms

Term	Meaning
TR1 (Transfer Form)	A TR1 is the official HM Land Registry form used to transfer ownership of a property from one person to another. Used for: • Buying or selling a property • Gifting or transferring property • Adding or removing an owner Once completed and registered with HM Land Registry, the new ownership becomes legally official.

Onboarding Steps

STEP 1

Create an account on the tmSign Dashboard

Action Steps

1. Open the tmSign Dashboard at https://app.esign365.app/login on your PC.
2. Enter your name.
3. Enter your company name.
4. Enter your email address.
5. Enter your phone number.
6. Create a password.
7. Click the underlined blue 'tmSign Terms and Conditions' link next to 'I agree to'.
8. Tick 'I Agree to tmSign Terms and Conditions' if you accept them.
9. Click Create Account to create your new tmSign account.

Tips

» Use a desktop or laptop for the best experience.

» Enter your full legal name exactly as it appears on official documents.

» Ensure your company name is correct and consistently formatted.

» Use a valid email address you regularly access for login and updates.

» Include your correct phone number with the country code.

» Create a strong password using a mix of letters, numbers, and symbols.

» Read the Terms and Conditions before agreeing.

» Double-check all details before selecting Create Account.

STEP 2

Log into the tmSign Dashboard

Action Steps

1. Enter your email address.
2. Enter your password.
3. Click the Log in button.

Tips

» Use the email address you registered when creating your tmSign account.

» Use the password you set when creating your tmSign account.

» If you forget your password, click the Forgot Password link below the Password field to receive an email with reset instructions.

STEP 3

Enter the OTP code to access the tmSign Dashboard

Action Steps

1. Enter the OTP code sent to your email to authenticate and access the tmSign Dashboard.
2. Click the Verify OTP button.

Tips

» Check your email inbox for an OTP code from tmSign.

» The OTP code is sent to the email you provided when creating your tmSign account.

» If you cannot find the tmSign email, check your Junk folder.

STEP 4

Send a Qualified Electronic Signature (QES) Request

Action Steps

1. Click Create New in the left-hand corner of the tmSign Dashboard.
2. This opens 'Create New Document'. Complete the process in order:

Create New > Signature Type > Documents > Upload Files > Add Recipients > Add CC

Click it to open the tmSign main page ('Prepare document for signing' – Step 1/2), where you can send signature requests.

Signature Type section:

3. To send a Qualified Electronic Signature (QES), click on 'Qualified Signature'.

Documents section:

4. Enter the preferred title in the 'Title' field.
5. Enter a preferred message for your signers in the 'Message' field.

Upload Files section:

6. Ensure the 'Upload Document' placed on the right-hand side at the top of the Upload Field section is clicked on.
7. Click the 'Upload' button on the left, beneath the Upload Files section. This opens your folders. Select the document you want to upload, then click 'Send'. The document will be uploaded to the tmSign Dashboard, where you can prepare it before sending it to signers.

Tips

» Work through each section in order.

» Always select 'Qualified Signature' if sending a QES – otherwise the request will not be set up correctly.

» Make sure the Title and Message fields are completed before moving on to upload.

» After clicking Next to send the document for signing, ensure the document appears under the Upload Files section on the right-hand side.

» Ensure each signer's name, email address, and telephone number are entered correctly before clicking + Add Recipient.

» Use the Bin icon to remove signers and re-add them in the correct order.

» If you are the account holder, use 'Add me' to auto-fill your details instead of typing them manually.

Add Recipients section (continued):

8. Type the first signer's name in the 'Recipient name' field.
9. Add the first signer's telephone number in the 'Enter your phone number' field, to the right of the Recipient name field.
10. Ensure the 'Signer' option is selected in the Signer drop-down field to the right of the first signer's telephone number field.
11. Click '+ Add Recipient' to add more signers as needed.
12. Follow the same process for each signer: name, email address, and telephone number.
13. To change the order in which signers receive the document, click the 'Bin' icon to remove signers, then re-add them in the correct sequence.
14. The tmSign account holder can add all their details at the click of the 'Add me' button, which automatically populates their name, email address, and telephone number.

Important: Signing order
tmSign sends documents for signing in the order signers are added. The first signer added receives the document first. Once they have signed, it passes automatically to the second signer, continuing in sequence until all signers have completed their signatures. The lawyer/conveyancer is the final recipient. After all signatures are complete, they add the date and time to validate the QES process. The QES document is issued only at the end of the process, once all signers have signed and the conveyancer/lawyer has reviewed and sealed the document by adding the date and time as a legal witness.

Be aware of CC behaviour:

- Signers already receive the signed document automatically.
- CC'ing them will result in duplicate emails.
- Each CC email will generate a new user account if one does not already exist, enabling CC'd users to view the document through the portal.

Add CC (Email) section:

15. Enter the recipient's email address in the 'Enter one or more email addresses separated by a comma' field if you want them to receive the signed QES document.

Note: All signers whose emails have already been added under Add Recipients will automatically receive the signed QES document once it is generated. CC'ing them again will result in duplicate emails.

16. To add multiple CC email addresses, enter the first email and add a comma immediately after it to register it in the system. Repeat for each additional address.
17. Note: Every email address you CC will automatically trigger the creation of a new user account if one does not already exist. This enables CC'd users to view the document through the portal.
18. Press the Next button at the top or bottom of the page to proceed to the document you want to send for signature, for example the TR1 form.

STEP 5

Access the document, add signature fields, date, and time

Drag and drop any of the fields from the left-hand side onto the document you want to send for signing. See the steps below for an example scenario of sending a QES document to be signed by two signers and legally validated by a conveyancer/lawyer, acting as the legal witness, through the addition of the date and time on the TR1.

Tips

» The 'Assigned to' and 'Fields' drop-downs typically default to the first recipient added under 'Add Recipients'. Always check these settings before proceeding.

» Ensure the correct individual is selected as the legal witness (conveyancer/lawyer). This role is responsible for validating the QES document by completing the date and time fields on the TR1.

» The conveyancer/lawyer is typically added as the third recipient and must be explicitly selected where required.

Adding Date and Time Fields and assigning the conveyancer/lawyer:

1. Drag and drop the 'Editable date' field from the left-hand side onto the TR1 form in the section 'Date and time when this document takes effect'.

2. Edit the date format by clicking the 'Date format' drop-down. Select your preferred format (for example, 'dd.MM.yyyy'). Once selected, this automatically updates the date formatting on the TR1 form.
3. To add a time to meet the HMLR requirement for a QES document, click the 'Time format' drop-down. Select your preferred format (for example, 'HH:mm:ss'). Once selected, this automatically adds a time next to the date field on the TR1 form.
4. Ensure you select the name of the conveyancer/lawyer from the 'Assigned to' drop-down. Select 'Account Holder Name' as this represents the lawyer/conveyancer in this TR1 scenario. This ensures the conveyancer/lawyer is requested to add the date and time to validate the QES document.
5. Ensure the 'Required' box is ticked so the QES document is sent as a requirement to the conveyancer/lawyer assigned to validate the document as a legal witness. This should be automatically ticked, but it is best practice to check.
6. Ensure you also select the name of the conveyancer/lawyer from the 'Fields' drop-down. Select 'Account Holder Name'.

Note: Normally both drop-downs ('Fields' and 'Assigned to') automatically default to the first recipient added under 'Add Recipients'.

7. Update both drop-downs to select the correct person acting as the legal witness. In this example, that is the third recipient (the conveyancer/lawyer) added in the tmSign Dashboard.
8. Once you have confirmed the correct recipient is assigned in both drop-downs for the date and time fields, proceed to assign the signature fields to the signers.

Adding Signature Fields and assigning the first signer:

1. Drag and drop the 'Signature' field from the left-hand side onto the TR1 form in Section 12 ('Signed by…') of the TR1 form.
2. Ensure you select the name of the first signer from the 'Assigned to' drop-down to ensure the QES document is correctly sent to the intended signer.

Note: The 'ID' field will display 'Signature 1', indicating this is the first signature request sent to the first signer.

3. Ensure you also select the name of the first signer from the 'Fields' drop-down.

Adding Signature Fields and assigning the second signer:

1. Drag and drop the 'Signature' field from the left-hand side onto the TR1 form in Section 12 ('Signed by…') of the TR1 form.
2. Ensure you select the name of the second signer from the 'Assigned to' drop-down.

Note: The 'ID' field will display 'Signature 2', indicating this is the second signature request.

3. Ensure you also select the name of the second signer from the 'Fields' drop-down.

Sending the TR1 document to your signers and the conveyancer/lawyer:

1. Once all signers and the legal witness have been correctly assigned, press the 'Send' button at the top right-hand side of the TR1 form. This will generate a pop-up confirming that 'the following document(s) will be sent to the recipient(s)'.
2. Press 'Send' if you are happy to proceed.
3. Press 'Not Now' if you wish to cancel.
4. If you press 'Send', the system processes your request and sends the document to your recipients. You will then see a confirmation screen: 'Document Sent: Document has been sent successfully'. This screen includes a 'Go to Dashboard' button.

STEP 6

Return to the tmSign Dashboard and access 'All Documents'

Action Steps

1. After clicking 'Go to Dashboard' upon sending the TR1 document, you will be redirected back to the tmSign Dashboard.
2. On the main tmSign Dashboard page, on the left-hand side under 'Create New', within the 'Documents' drop-down, click 'All Documents'. This displays all documents you have sent to recipients.
3. Above the document list, there are four top bar filter fields: (a) Document Title, (b) Status, (c) Sent Date, (d) Last Activity.
4. Each field includes drop-down filtering options: Ascending (Asc), Descending (Desc), None (returns to default view), and Hide (removes the field from view).

Note: The 'Type' and 'Signer' fields do not include drop-down filters.

5. The 'Signer' top bar field summarises all recipients, including signers and the legal witness/lawyer.
6. The 'Type' top bar field indicates the type of signature selected: Standard, Advanced, or Qualified Electronic Signature (QES).
7. Hovering over the 'Signer' top bar field displays a quick summary showing the completion status of each signer's task.

Tips

» Use the 'Status' field as the quickest way to identify whether a document is awaiting signatures, pending legal witness validation, or completed.

» The 'Signer' hover summary is particularly useful when multiple recipients are involved, as it allows you to quickly identify which recipient still needs to take action.

» When working with QES workflows, the document will remain in progress until both signers have signed and the lawyer/conveyancer has added the date and time.

» Use sorting filters such as Sent Date or Last Activity to quickly locate recently sent documents.

» The 'Type' field allows you to distinguish between Standard, Advanced, and Qualified (QES) documents when managing multiple workflows.

STEP 7

Access 'Completed Documents'

Action Steps

1. On the main tmSign Dashboard page, on the left-hand side under 'Create New', within the 'Documents' drop-down, click 'Completed Documents'. This displays all documents you have sent that have been completed with nothing outstanding.
2. Above the document list, there are four top bar filter fields: Document Title, Status, Sent Date, Last Activity.
3. Each field includes drop-down filtering options: Ascending (Asc), Descending (Desc), None, Hide.

Note: The 'Type' and 'Signer' fields do not include drop-down filters.

4. The 'Signer' top bar field summarises all recipients including signers and the legal witness/lawyer.
5. The 'Type' top bar field indicates the type of signature: Standard, Advanced, or Qualified Electronic Signature (QES).
6. Hovering over the 'Signer' top bar field displays a quick summary showing the completion status of each signer's task.

Note: Once a document has reached the completed state, the information shown is final and will not change further. This section is intended for review and verification only. No further editing or workflow actions can be performed from within it.

Tips

» Use this view as the final validation checkpoint before archiving or exporting completed transactions.

» If a document you expect to see is missing, check 'All Documents' first. It usually indicates at least one recipient has not yet completed their task.

» This section is particularly useful for audit and compliance purposes, as it only displays fully completed workflows.

» For QES workflows, ensure both signature completion and legal witness validation (date and time entry) have been fully processed before expecting the document to appear here.

» Documents may take a short moment to appear in this section after completion, as the system finalises all recipient actions.

STEP 8

Access 'Incomplete Documents'

Action Steps

1. On the main tmSign Dashboard page, on the left-hand side under 'Create New', within the 'Documents' drop-down, click 'Incomplete Documents'. This displays all documents you have sent that have not been completed and are outstanding.
2. Above the document list, there are four top bar filter fields: Document Title, Status, Sent Date, Last Activity.
3. Each field includes drop-down filtering options: Ascending (Asc), Descending (Desc), None, Hide.

Note: The 'Type' and 'Signer' fields do not include drop-down filters.

4. The 'Signer' top bar field summarises all recipients including signers and the legal witness/lawyer.
5. The 'Type' top bar field indicates the type of signature: Standard, Advanced, or Qualified Electronic Signature (QES).
6. Hovering over the 'Signer' top bar field displays a quick summary showing the completion status of each signer's task.

Note: If none of the recipients have completed their tasks, 'No Data' will be displayed underneath the top bar fields.

Tips

» The 'Status' field is the quickest indicator of whether a document is still in progress or awaiting completion.

» The 'Signer' hover summary provides a quick overview of completion progress across all recipients without needing to open the document.

» Where a lawyer/conveyancer is involved as the legal witness, the document will remain in progress until both signers have signed and the lawyer/conveyancer has added the date and time.

» The 'Last Activity' field reflects the most recent system update across any recipient action, not just signing activity.

» This display is best used for monitoring workflow progress at a high level, rather than for detailed document management tasks.

Key Reminders

Verify settings during setup	The values shown in the top bar fields are driven by system configuration at the point of sending. Verify settings during setup, not after submission.
QES determines workflow requirements	The selected signature type (e.g. Qualified/QES) determines the workflow requirements, including whether legal witness validation is required.
The conveyancer/lawyer role is for legal witnessing	The conveyancer/lawyer's role is strictly for legal witnessing: entering the date and time on the TR1 to complete the QES validation. They do not provide a standard signature unless separately required.
Always confirm 'Fields' and 'Assigned to' match	Always confirm that both 'Fields' and 'Assigned to' selections match the intended recipient to avoid misrouting signature or validation responsibilities.
Check signing order before proceeding	tmSign sends documents in the order signers are added. Use the Bin icon to remove signers and re-add them in the correct order if needed.
Use 'Add me' for accuracy and speed	If you are the account holder, use 'Add me' to auto-fill your details rather than typing them manually.

Need help?
If you face any problems while using the tmSign Dashboard, please contact the support team.