

General Requirements:

- Fast load times / smart storage & database
- Secure
- Scalable in the future
- Built for easy integration/API (Zapier, Hubspot, etc)

MVP Requirements:

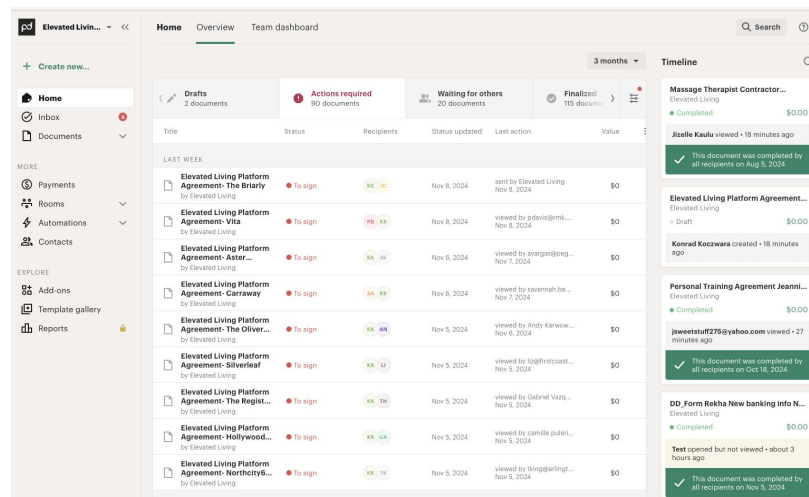
Anything highlighted in yellow is not required for MVP, but I want you to take note that we will develop in the future.

Prospect:

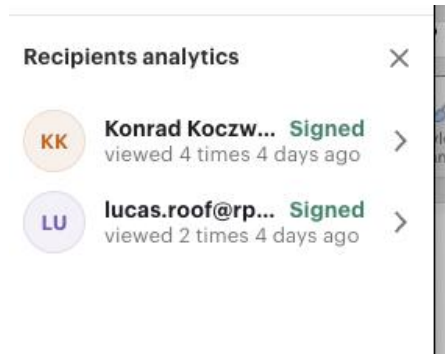
- Free trial sign up flow (limited by time)
 - App will show a header counting own days
- Email verification sent to verify user (6 digit code via email)
- Access to customer dashboard

Customer:

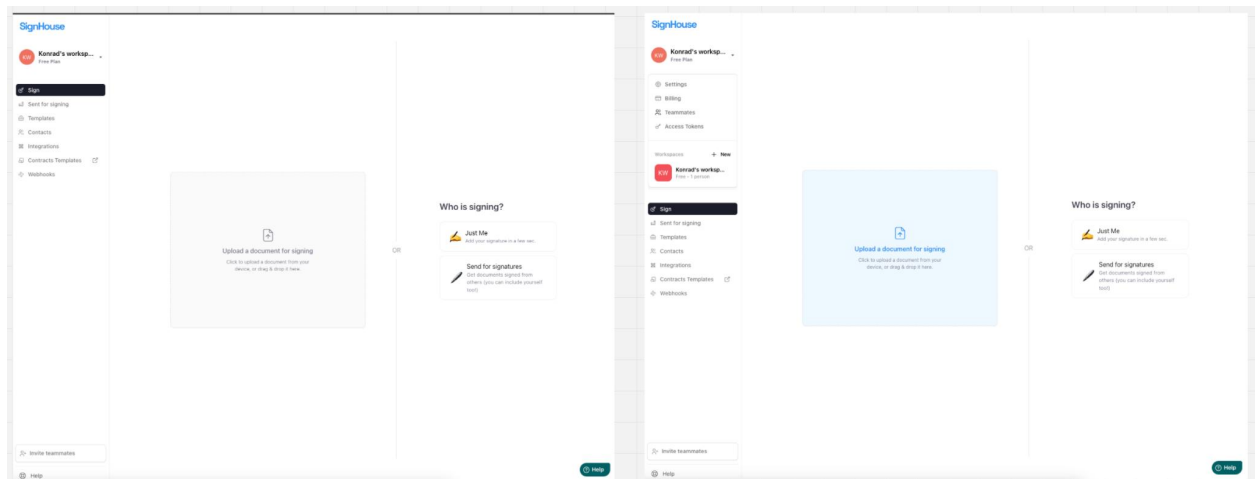
- Basic dashboard for MVP (home page)
 - Shows left side menu and middle of screen shows two tabs: PENDING / COMPLETED status (by tabs)
 - Sorted by sent data
 - Table has following data
 - Document Name
 - Status (To Sign, Expired)
 - Recipients (initials with full information upon hover)
 - Sent Data
 - Last action item (sent by Konrad or viewed by Customer name or auto reminder sent to Customer Name) with date



- Ability to click on documents pending/completed to view full screen
 - Basic document analytics (for signers such as

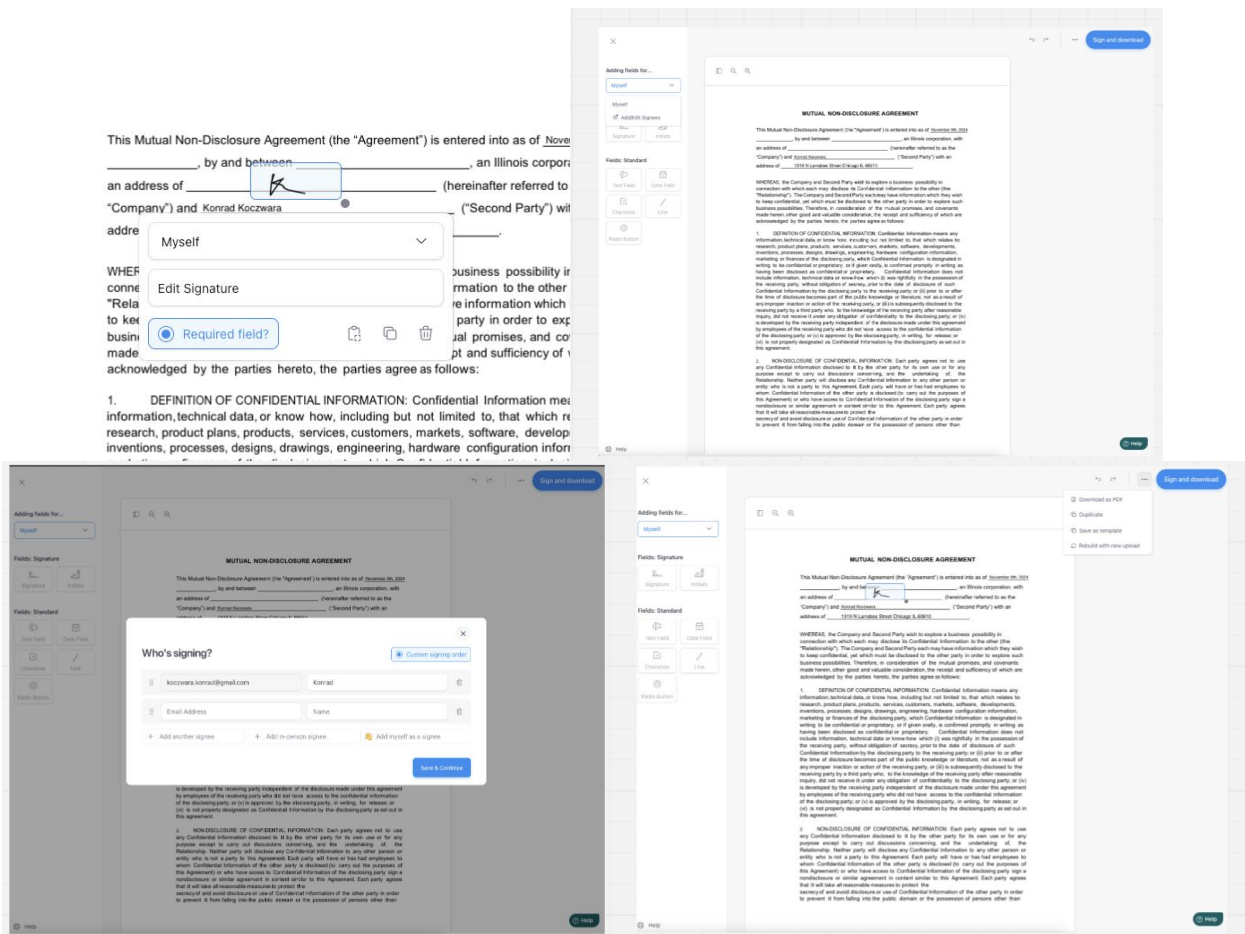


- Left Side Menu



- Company name “workspace” at the top (long term, clickable and switchable between workspaces)
- “Sign” call to action button
 - 1) Choose from template or 2) upload document
- Templates
 - List view
 - Add folders
 - Delete folders
 - Rename folders
 - Tab for “Template Library” (pre-made templates by us for various use cases)
- Fields
 - Future: Shows a list of all custom fields / merge fields for CRM mapping
- Contacts
 - Simple view of all contacts in our database
 - First name, last name, email address & status (active customer / non-active (basically anyone who is not a paying user which is usually a signee or person receiving document to sign))
- Integrations
 - <https://zapier.com/apps/signhouse/integrations> (EXAMPLE)

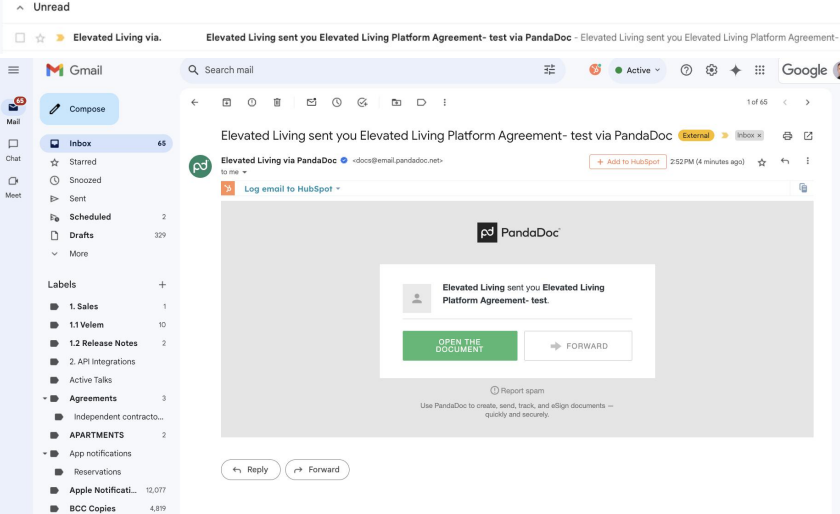
- Future: Direct Integration with various CRM systems
 - Settings (bottom)
 - My account
 - Update first name & last name
 - Update Sender Name
 - Update email
 - Update password
 - Long term: ability to manage multiple workspaces/billing
 - Team
 - View list of users
 - Add/Delete users
 - Pricing updates according to # of users per month/prorated
 - Plan
 - Simple summary on top showing plan / cost
 - Charge history
 - Option to send previous receipt via email
 - Manage plan
 - Convert from free trial to paid plan
 - Downgrade
 - Upgrade
 - Monthly only (no annual for now)
 - Updating payment information
- Left side menu for MVP
 - Long term – Double left side menu (similar to pandadoc/activecampaign)
- Basic document editor (for assigning fields - no text editing for MVP)



- Add/Edit Signees
 - Fields required to add/edit:
 - Email required
 - First name
 - Last name
 - Organize signing order
- Add fields:
 - Add signature fields
 - Add initials
 - Add text fields
 - Add Date Field
 - Add Checkbox
 - Add Line
 - Add Radio Button
 - Add Dropdown
 - Collect Files
- Field editing
 - Re-assign fields to signees
 - Required or not required
 - Duplicating field

- Duplicating field to all pages
 - Delete field
 - Placeholder text
- Global document settings
 - Download document
 - Convert to Template
 - Reminders
 - Expiration date
- Sending document
 - If using a template or adding a document via upload, sender is allowed to update the display name of the document being sent to receiver.
- Future will be full editable document builder - similar to microsoft word/pandadoc

Receiver:

- Flow
 - Once sent to receiver/signee, they receive an email to begin signing
- 
- Able to fill out documents electronically with all required fields.
 - Approves signed document
 - Ability to view document but not edit once it's completed by receiver
 - Final link sent to receiver once all parties complete
 - Ability to download view final document completed by all parties
 - Document viewing expires, will need to regenerate link after 3 months.

Overall Signing flow:

1. Sender generates document & assigns signing order (or uses default signing order)
 - a. There may be multiple signers/receivers supported
 - b. Sender required to add receiver first name, last name, and email address
2. Receiver receives document

PandaDoc **Elevated Living Platform Agreement- test** app.pandadoc.com More actions

Please fill in 12 required fields. Start

Elevated Living Platform Agreement- test 1 of 1 document

Resident Engagement Platform Order Form

[Elevated Lifestyles Inc. DBA Elevated Living] specializes in establishing highly effective resident event programming, resident personal services, and white-labeled software / mobile app for resident lifestyle management. During the course of this term Elevated Living will partner with and provide resident lifestyle, technology, and various personal resident services to:

Legal Name of Entity:

Address:

on a monthly basis with the option to renew contract at the end of the term. The contract will start on and end on

Either party may cancel these services with 30 days notice.

Payment Terms:

PAYMENT: Due prior to or at the beginning of the month serviced.

EXHIBIT A:

Service	Pricing	Additional information
Base Technology & Services Fee (Required)	\$ 134.50/month (249 units @ \$0.50/unit per month - discounted)	Technology included: - Branded Resident App & Management Portal Service Management included: - Fitness Concierge Program - Includes management of group fitness class schedule, staffing, sub requests, hiring, and liability waivers. (Property to provide annual budget) - Dedicated Event Planner assigned to community. (Property to provide annual budget) - Host style lifestyle concierge services on-site (housekeeping, Personal Trainers, Pet Services, etc.) - Access to our neighborhood parks specialist who helps create VIP parks and discounts to local business for your residents. - Revenue share of 3% from all amenity services managed by Elevated Living Onboarding / Training: Initial onboarding call is included for the on-site team with ongoing customer support via support@elevatedliving.com and assigned account manager.
ButterflyMX API integration	\$24.50/month (249 units @ \$0.10/unit per month - discounted)	Bring ButterflyMX functionality into branded resident app via API

- 3.
4. Receiver signs
5. Original sender gets an email alert when document is viewed OR signed
6. Receivers get an email alert when document is FULLY completed BY ALL SIGNERS ONLY
7. Everyone receives a final completed document
8. Document only gets stored in the “customer” account.
9. Non customers can only access via link (which expires)
10. Downloadable PDF with signature certificate

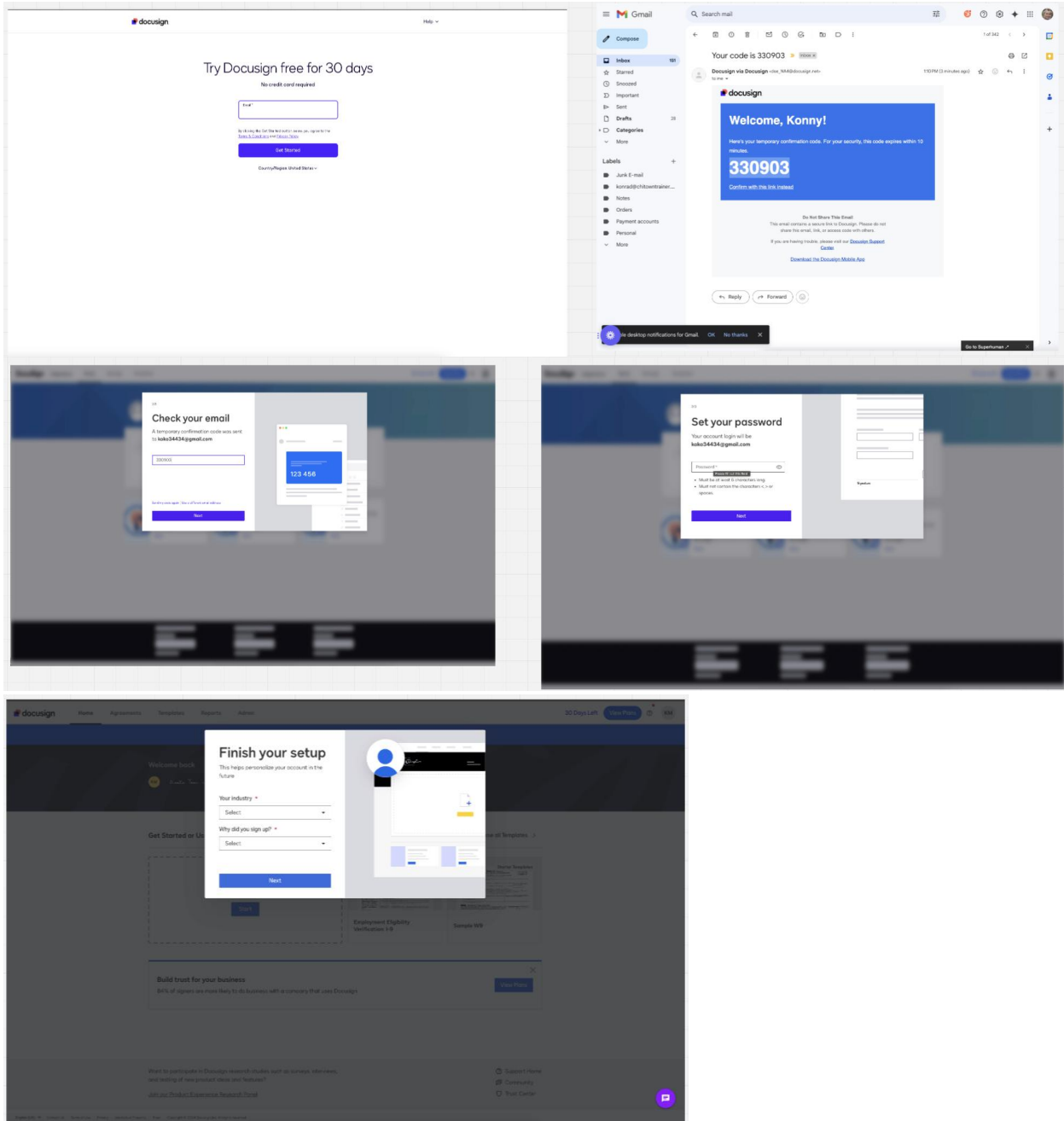


a.

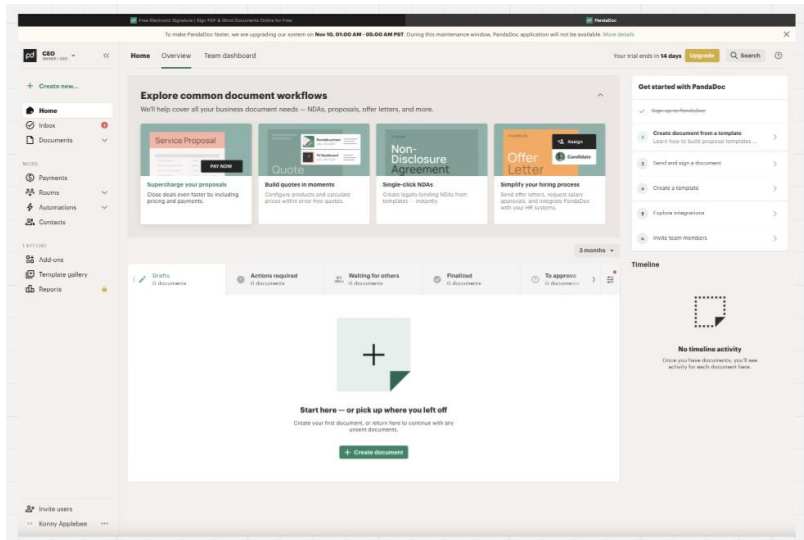
For admin:

- Stripe integration
 - Ability to handle taxes based on state/country
- Simple dashboard (possibly mimic, customer dashboard but with an admin panel with ability to shadow user)
 - View financials
 - View customers / prospects (signees & receivers)
 - Typical SaaS metrics (new customers, average transaction size, churn, etc)
 - [Please provide recommendations here](#)
- Open to recommendations as it relates to integrating this app into a more out of the box solution / CRM (such as Hubspot/ActiveCampaign) – maybe longer term plan?

User sign up flow (I like docusign the most)



Dashboard (I like the pending/completed tabs in pandadoc and left side menu bar set up)
I do like the activity history on the right sidebar as well (but this is a later feature)



Let's assume my designs will closely replicate the way these systems look and feel. I do like editor inside usesignhouse.com (simple & easy)

Adding fields for...

Myself

Fields: Standard

Text Field

Date Field

Checkbox

Line

Radio Button

MUTUAL NON-DISCLOSURE AGREEMENT

This Mutual Non-Disclosure Agreement (the "Agreement") is entered into as of November 9th, 2024 by and between Myself, an Illinois corporation, with an address of 1319 N Larrabee Street Chicago IL 60610 (hereinafter referred to as the "Company") and Konrad Koczwar ("Second Party") with an address of 1319 N Larrabee Street Chicago IL 60610.

WHEREAS, the Company and Second Party wish to explore a business possibility in connection with which each may disclose its Confidential Information to the other (the "Relationship"). The Company and Second Party wish to explore this possibility in writing to be confidential or proprietary, or if given orally, is confirmed promptly in writing as having been disclosed as confidential or proprietary. Confidential Information does not include information, technical data or know-how which (i) was rightfully in the possession of the receiving party, without obligation of secrecy, prior to the date of disclosure of such Confidential Information by the disclosing party to the receiving party; or (ii) prior to or after the time of disclosure becomes part of the public knowledge or literature, not as a result of any improper inaction or action of the receiving party; or (iii) is subsequently disclosed to the receiving party by a third party who, to the knowledge of the receiving party after reasonable inquiry, did not receive it under any obligation of confidentiality to the disclosing party; or (iv) is developed by the receiving party independent of the disclosure made under this agreement by employees of the receiving party who did not have access to the confidential information of the disclosing party; or (v) is approved by the disclosing party, in writing, for release; or (vi) is not properly designated as Confidential Information by the disclosing party as set out in this agreement.

2. NON-DISCLOSURE OF CONFIDENTIAL INFORMATION: Each party agrees not to use any Confidential Information disclosed to it by the other party for its own use or for any purpose except to carry out discussions concerning, and the undertaking of, the Relationship. Neither party will disclose any Confidential Information to any other person or entity who is not a party to this Agreement. Each party will have or has had employees to whom Confidential Information of the other party is disclosed (to carry out the purposes of this Agreement) or who have access to Confidential Information of the disclosing party sign a nondisclosure or similar agreement in content similar to this Agreement. Each party agrees that it will take all reasonable measures to protect the secrecy of and avoid disclosure or use of Confidential Information of the other party in order to prevent it from falling into the public domain or the possession of persons other than

Who's signing?

konrad.koczwar@gmail.com

Konrad

Email Address

Konrad

Add another signer

Add in-person signer

Add myself as a signer

Next & Continue

Adding fields for...

Myself

Fields: Signature

Signature

Initials

Fields: Standard

Text Field

Date Field

Checkbox

Line

Radio Button

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Legal considerations (we need to make sure our app complies with the below)

In the United States, the primary laws governing e-signatures are the Electronic Signatures in Global and National Commerce (ESIGN) Act and the Uniform Electronic Transactions Act (UETA). These laws establish that electronic signatures are legally equivalent to handwritten signatures, provided certain conditions are met.

****Key Requirements for Legally Binding E-Signatures:****

1. ****Intent to Sign:**** The signer must demonstrate a clear intention to sign the document electronically. This can be shown through actions like typing their name, drawing a signature, or clicking an "I Agree" button.

2. ****Consent to Do Business Electronically:**** All parties must consent to conduct transactions electronically. It's advisable to include a clause in your app where users agree to use electronic records and signatures. **NEED TO MAKE SURE WE HAVE A TERMS & CONDITIONS that signers agree to prior to signing that they agree to conduct transactions electronically (could be a simple box check)**

3. ****Association of Signature with the Record:**** The electronic signature must be logically associated with the document. This often involves maintaining an audit trail that records details like who signed the document and when.

4. ****Record Retention:**** Electronic records should be stored in a manner that is accurate, accessible, and reproducible for future reference. This ensures that the signed documents can be presented as evidence if needed.

****Additional Considerations:****

- ****Consumer Disclosure:**** For transactions involving consumers, the ESIGN Act requires that consumers receive clear disclosures about their rights regarding electronic records and signatures. They must also consent to receive information electronically.

- ****State Laws:**** While the ESIGN Act is a federal law, UETA has been adopted by 49 states, the District of Columbia, and the U.S. Virgin Islands. New York has its own electronic signature law. Ensure your app complies with the specific requirements of each jurisdiction where it will be used.

By incorporating these elements into your app, you can help ensure that the electronic signatures collected are legally binding and compliant with U.S. laws.