



ADOBE ECHOSIGN

User Guide



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Welcome to EchoSign!

Before you begin using your EchoSign account, we've got some basics to run through. The purpose of this guide is to get you familiar with the different sections of EchoSign and the different functionality available.

This guide is outlined in such a way that as you move through the "chapters", you'll cover all of the important features and area of the application. By the end, you'll be familiar with EchoSign and should be ready to go. Keep in mind, there are plenty of other use cases and ways to use the application that aren't covered in this guide. Our knowledge base is an excellent resource for getting information on the other settings and processes that can be found in EchoSign.

Now sit back, login and let's get you eSigning!



Common Processes

In this first section we will go over the common processes and workflows in EchoSign. These step by step guides will lead you through sending, managing agreements, and basic actions you can take on transactions.

Sending

Sending documents out for signature is probably what you'll be doing the most. Fortunately, it's also one of the easier processes in EchoSign.

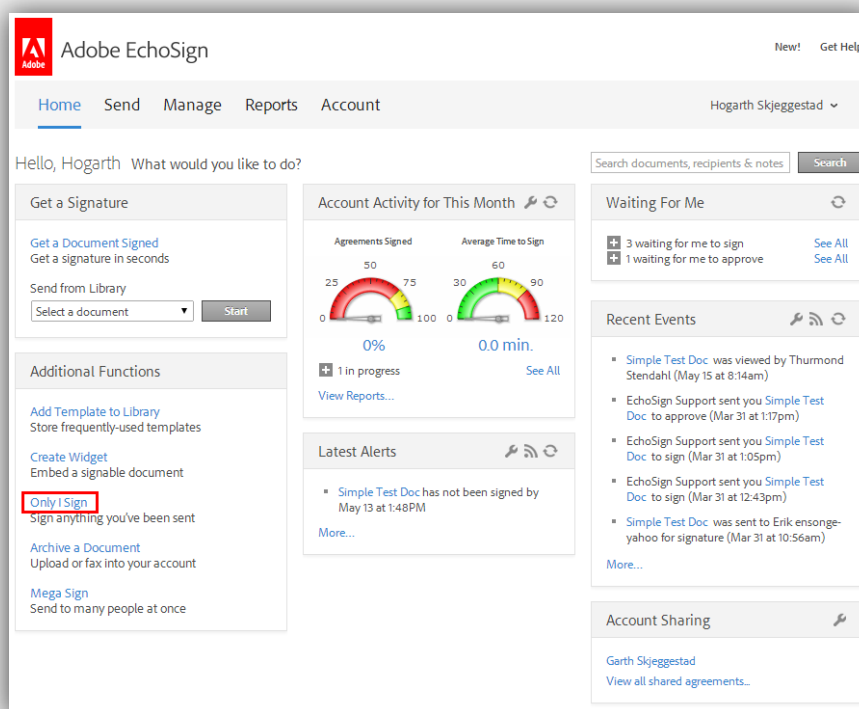
Below is a step-by-step guide on sending out an agreement. Ideally you will want to send a test to an alternate email address you have access to, when trying this out. Alternatively, you can follow along if you have an agreement to send out to someone.

Only I Sign

This process is exactly as it's named. This is used for situations where only you need to sign a document and have it sent to someone else.

Click Only I Sign on the Home page

This process can only be accessed from the Home page.



Enter recipient's email addresses

This is who you plan on sending the document to. Make sure this is not the email address you use to login. EchoSign doesn't like that.

Only I Sign

Upload or add documents you need to sign. After you have signed, a PDF copy of the signed document will be sent to the recipients you specify below.

To:
[Show Cc](#)

Document Name:

Message:

Language:

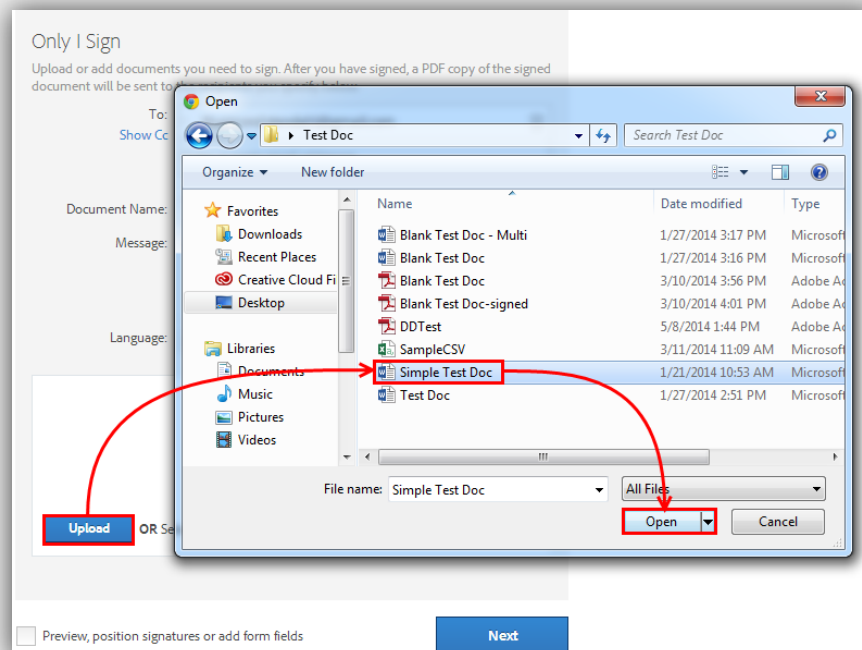
Drag files here

OR Select from: [Document Library](#) | [Google Drive](#) [More](#)

☐ Preview, position signatures or add form fields

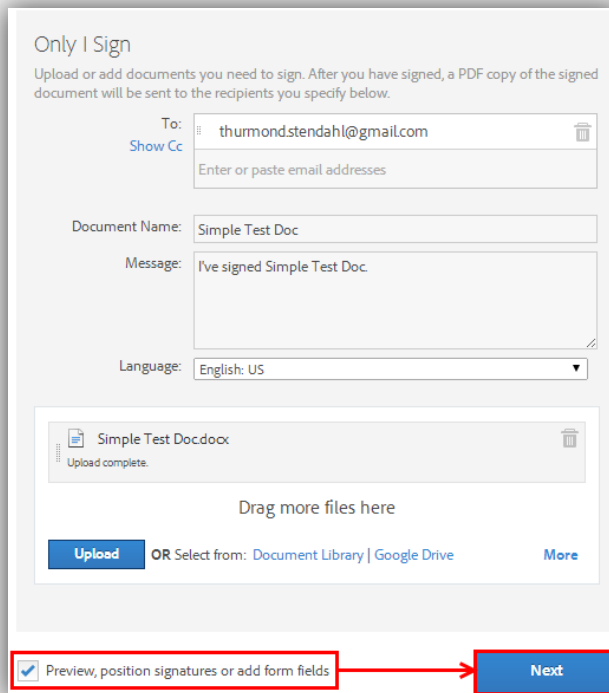
Upload your document

Click the Upload button, navigate to the document you want to sign and send, and click Open.



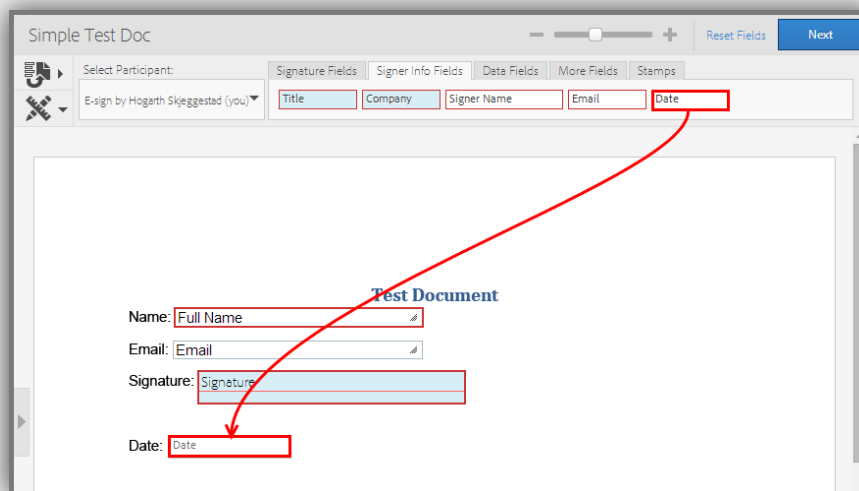
Check the Preview option and click Next

Checking this option will take you to the drag and drop authoring environment to place fields for you to fill in.



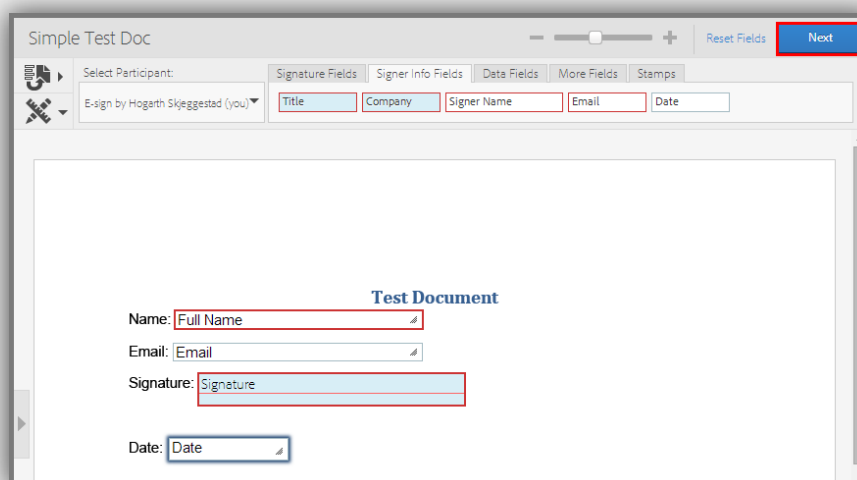
Place fields

Drag necessary fields from the various tabs and drop them on the document.



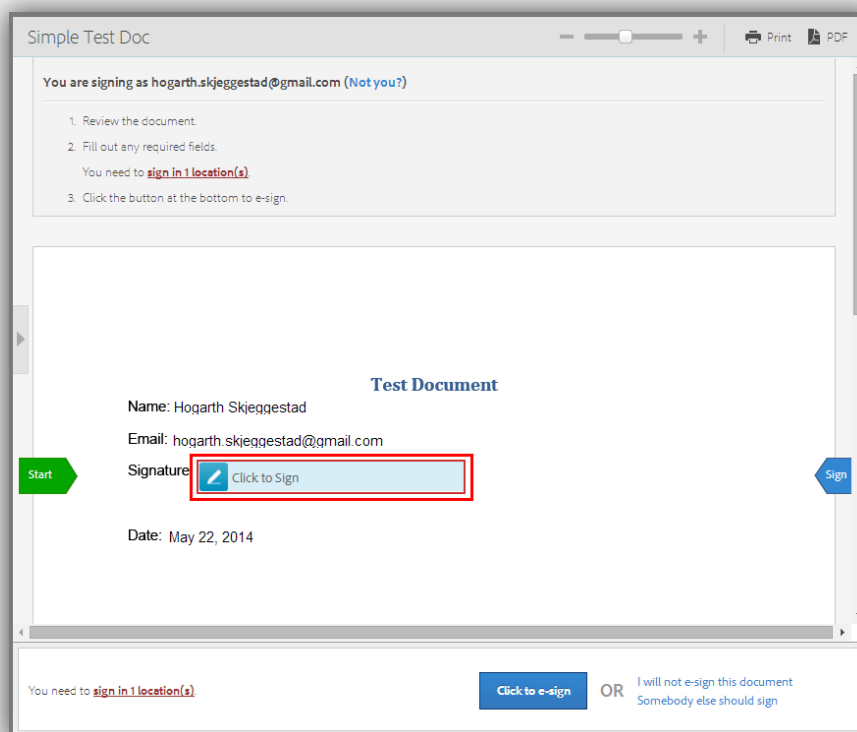
Click Next

Easy enough...



Enter info and sign

Click into the fields and enter the information required. Click on the Signature Field to sign.



Apply your signature

Entering your name to generate your signature. Once you're done, click the Apply button.



1 Enter Your Name

Hogarth Skjeggstad OR Provide your Social Identity [f](#) [in](#) [s](#) [?](#)

2 Review Your Signature

Hogarth Skjeggstad

Hogarth Skjeggstad (May 22, 2014)

[I would like to draw my signature](#)

3 **Apply** [Cancel](#)

Complete and send

Once you've entered all of the information needed and signed, click the Click to e-sign button.

Test Document

Name: Hogarth Skjeggstad

Email: hogarth.skjeggstad@gmail.com

Signature: *Hogarth Skjeggstad*

Date: May 22, 2014

☒ I agree to the [terms of use](#). I have reviewed the [consumer disclosure](#) related to electronic signatures and agree to do business electronically with EchoSign. [Learn more.](#)

Click to e-sign OR I will not e-sign this document
Somebody else should sign

To finish signing this document, just click the button below.

Bask in your awesomeness

The document has now been sent to the recipient. Take a break. You've earned it.

☒ **You're Done!**

You have successfully e-signed the agreement "Simple Test Doc". Copies will be e-mailed to all parties.

[Manage this document](#)

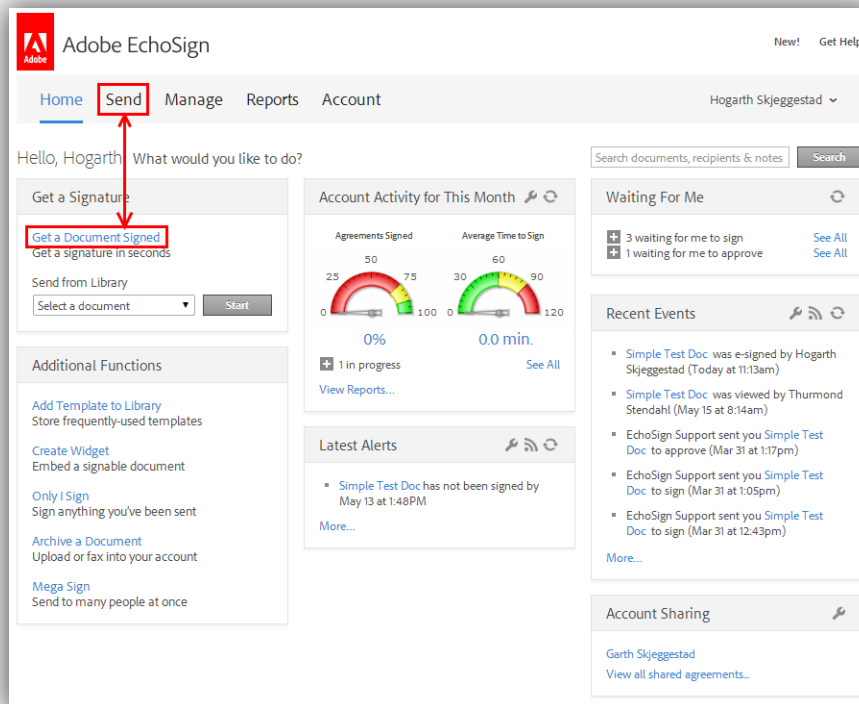
Single Signer

If you need a document signed by one individual, this is the process you'll want to use. While this and the Only I Sign process are different, you'll see quite a few of the steps are similar.



Navigate to the Send page

You can either click Send or click on the Get a Document Signed link to get to the Send page.



Enter signer's email address

Enter the email address of the person you want to sign the document.

Get a Document Signed

To:

☐ I need to sign

Document Name:

Message:

Language:

Identity Verification

Email delivery (default)

Send Options

☐ Set password to open signed PDF

Signature Types

☒ E-signature ☐ Fax Signature

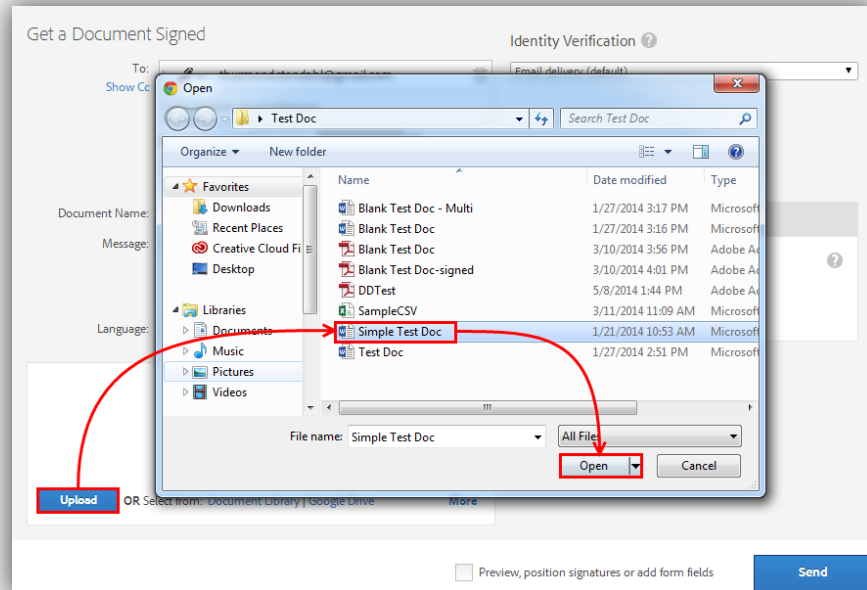
Drag files here

OR Select from: [Document Library](#) | [Google Drive](#)

☐ Preview, position signatures or add form fields

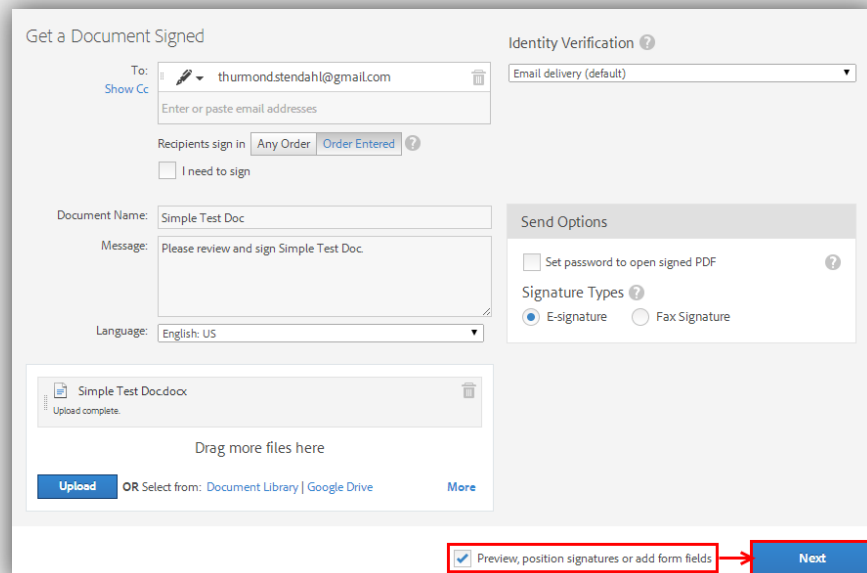
Upload your document

Click the Upload button, navigate to the document you want to sign and send, and click Open.



Check the Preview option and click Next

Checking this option will take you to the drag and drop authoring environment to place fields for you to fill in.



Place fields

Drag necessary fields from the various tabs and drop them on the document.



Simple Test Doc

Select Participant:
E-sign by Thurmond Stendahl
(thurmond.stendahl@gmail.com)

Signature Fields | Signer Info Fields | Data Fields | More Fields | Stamps

Signature | Initials | Signature Block

Test Document

Name: Full Name
Email: Email
Signature: Signature
Date: Date

Click Send
Pretty easy, right?

Simple Test Doc

Select Participant:
E-sign by Thurmond Stendahl
(thurmond.stendahl@gmail.com)

Signature Fields | Signer Info Fields | Data Fields | More Fields | Stamps

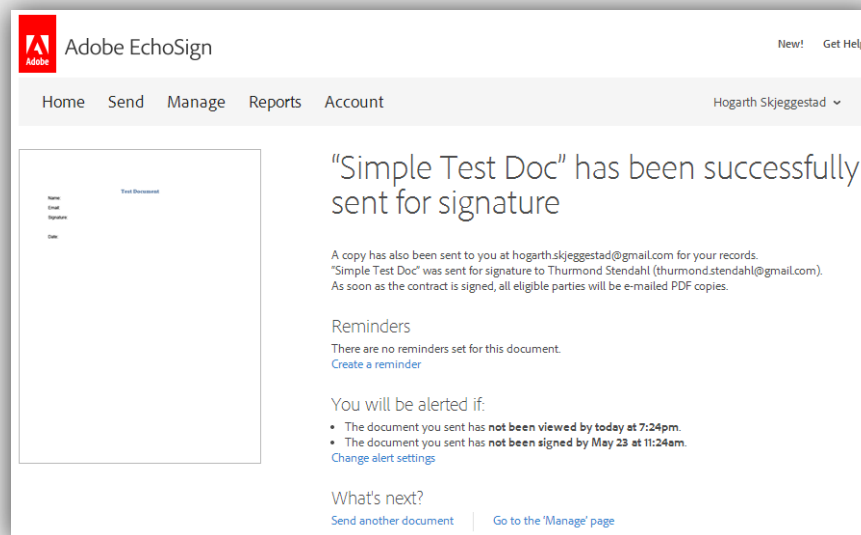
Signature | Initials | Signature Block

Test Document

Name: Full Name
Email: Email
Signature: Signature
Date: Date



Relish in your victory



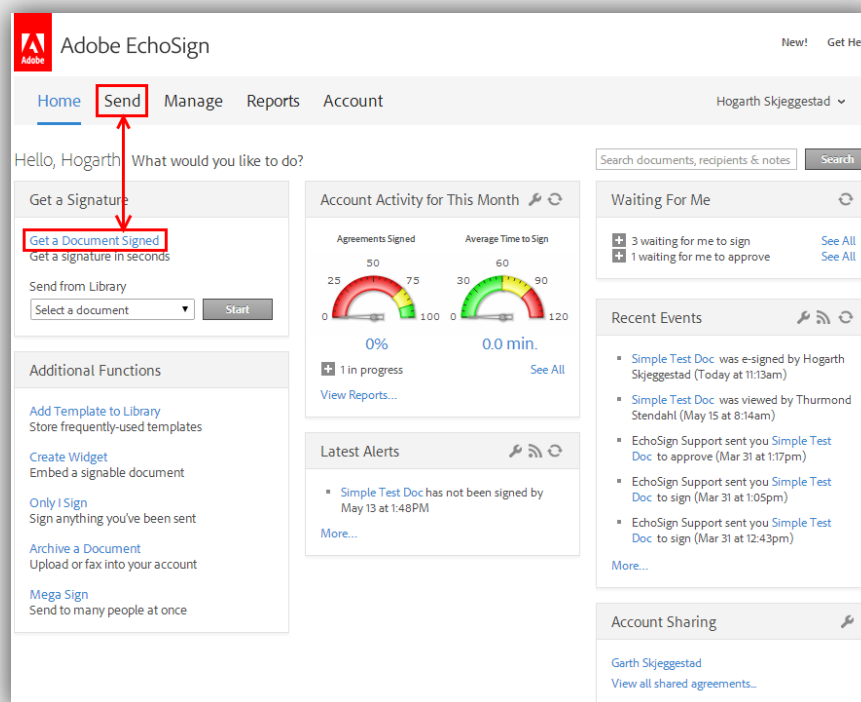
Multiple Signers

Depending on your business requirements, you may need signatures for multiple people on one document. Not a problem, sending to multiple signers is just as easy as sending to one.

This process is exactly the same as sending an agreement to the same email address more than once. If two people share an email address, follow the same process as outlined below and just use the same email.

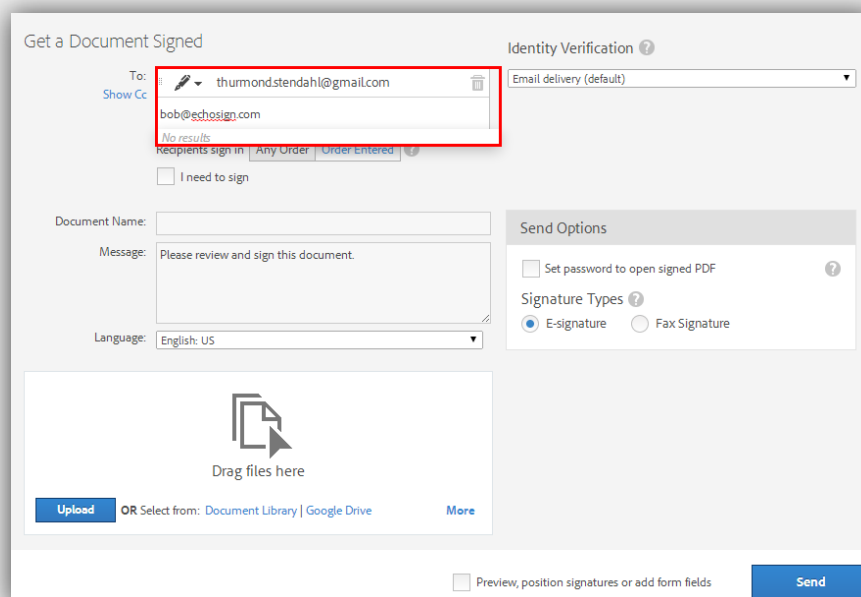
Navigate to the Send page

You can either click Send or click on the Get a Document Signed link to get to the Send page.



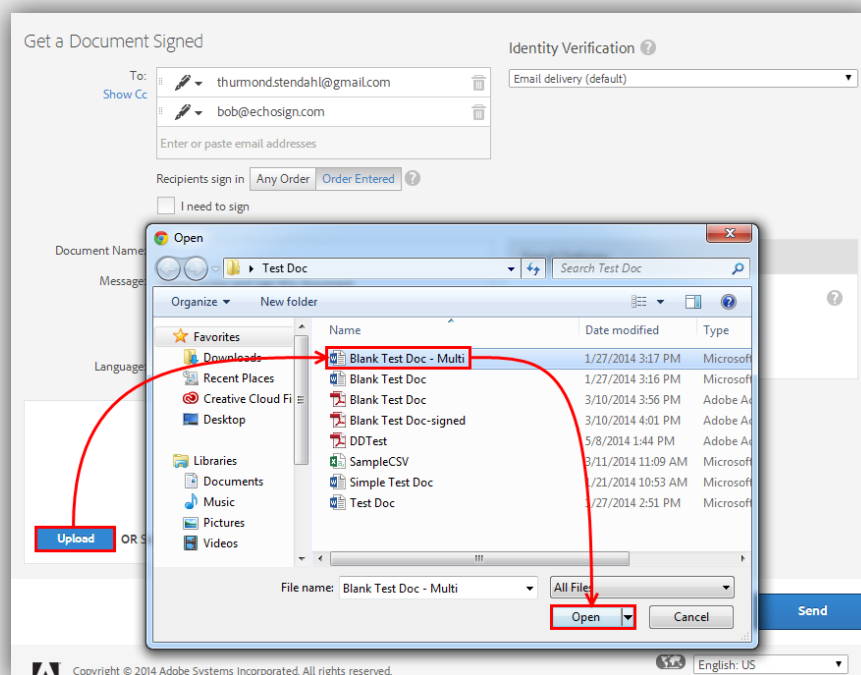
Enter the email addresses of the signers

By default, the signers will sign the document in the order they are entered here. You can rearrange them by clicking and dragging on the left side of the box with the email.



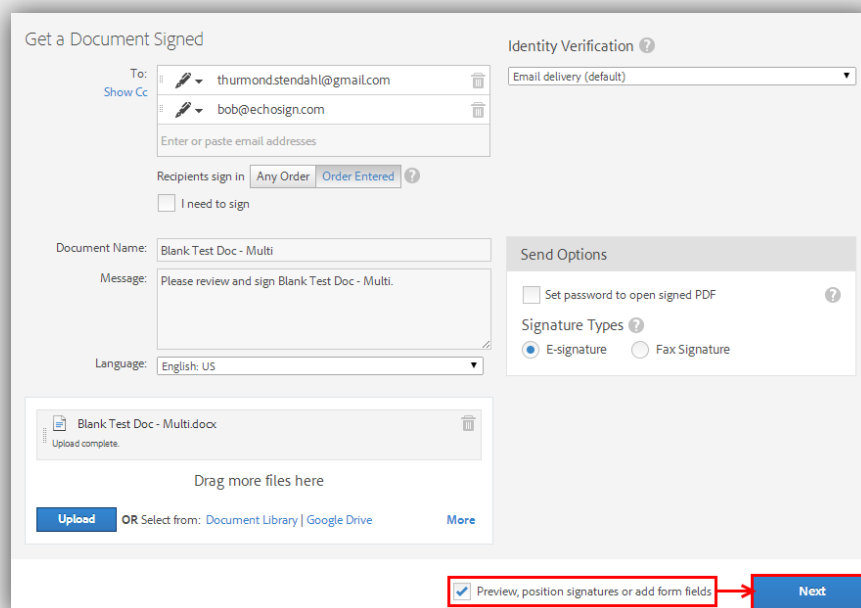
Upload your document

Click the Upload button, navigate to the document you want to sign and send, and click Open.



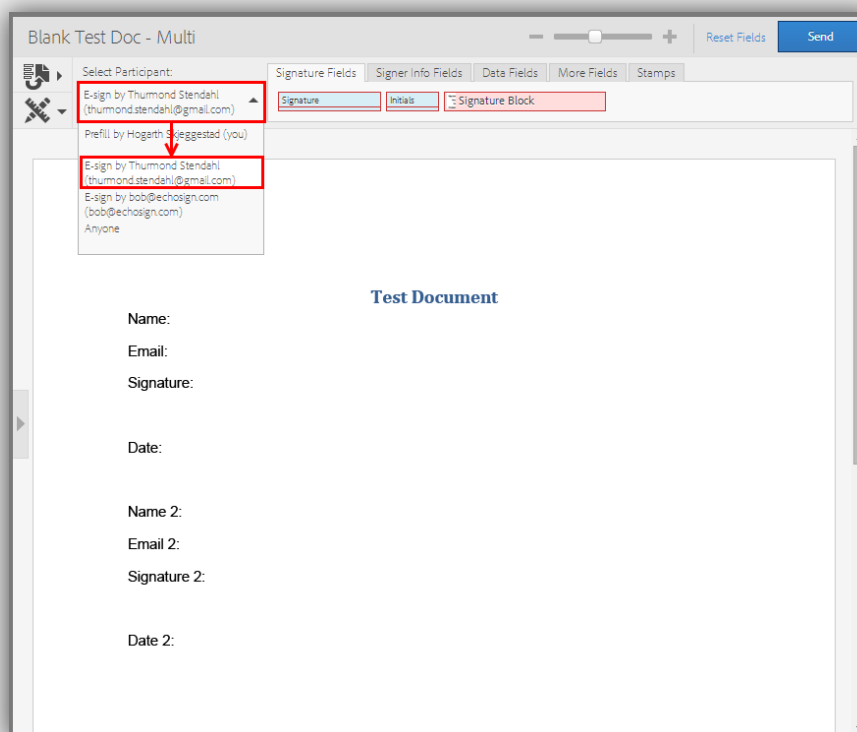
Check the Preview option and click Next

Checking this option will take you to the drag and drop authoring environment to place fields for you to fill in. Do you see a trend here?



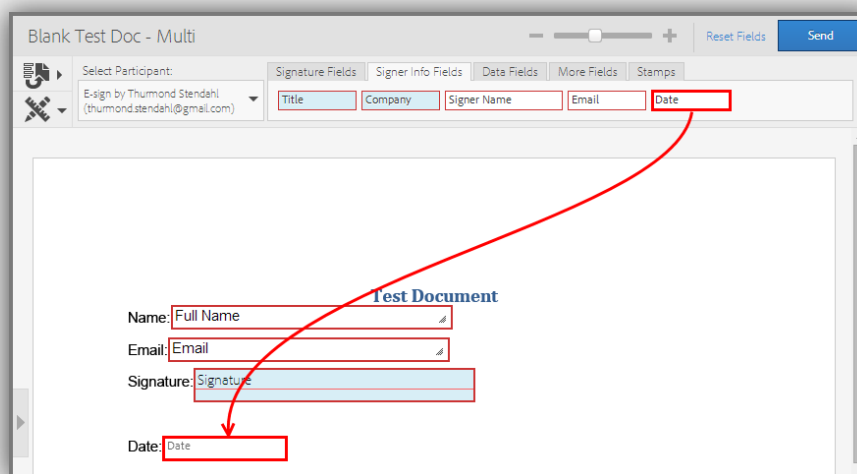
Choose a Participant

By default the first person to sign is chosen. Choosing them means all of the fields you place on the document will be assigned to them. This is **very** important and a lot of problems can come from not understanding this concept.



Place fields for selected Participant

Make sure you're placing fields for all of the information you need from this signer.





Choose the next Participant

Choose the second person to sign from the dropdown menu.

Blank Test Doc - Multi

Select Participant:

- E-sign by Thumond Stendahl (thumond.stendahl@gmail.com)
- E-sign by bob@echosign.com (bob@echosign.com)
- Anyone

Signature Fields: Title, Company, Signer Name, Email, Date

Test Document

Name: Full Name

Email: Email

Signature: Signature

Date: Date

Place fields for selected Participant

Again, make sure you're placing fields for all of the information you want to collect from this signer.

Blank Test Doc - Multi

Select Participant:

- E-sign by bob@echosign.com (bob@echosign.com)

Signature Fields: Title, Company, Signer Name, Email, Date

Test Document

Name: Full Name

Email: Email

Signature: Signature

Date: Date

Name 2: Full Name

Email 2: Email

Signature 2: Signature

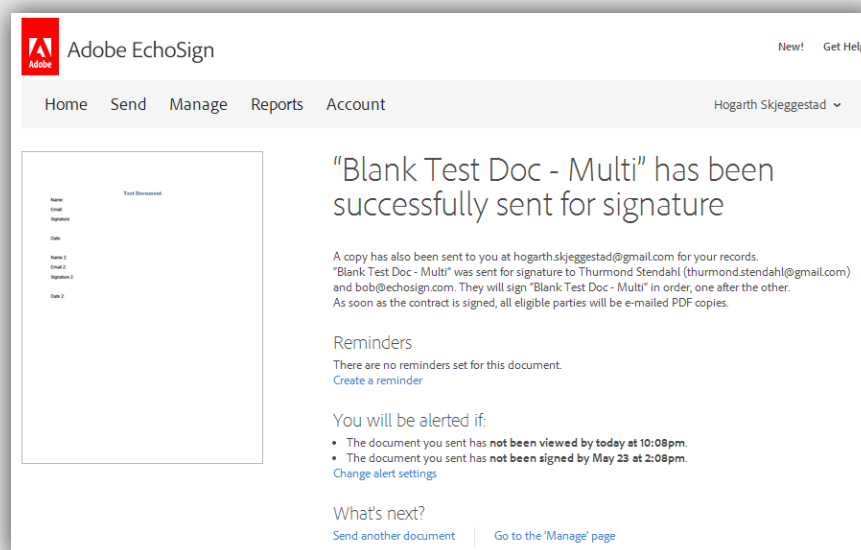
Date 2: Date

Alternatively, you can change the Participant by double clicking on the field and choosing a different signer from the Role dropdown.



Click Send
Almost there...

Well done!
Now just sit back and wait for the agreements to roll in.



Managing

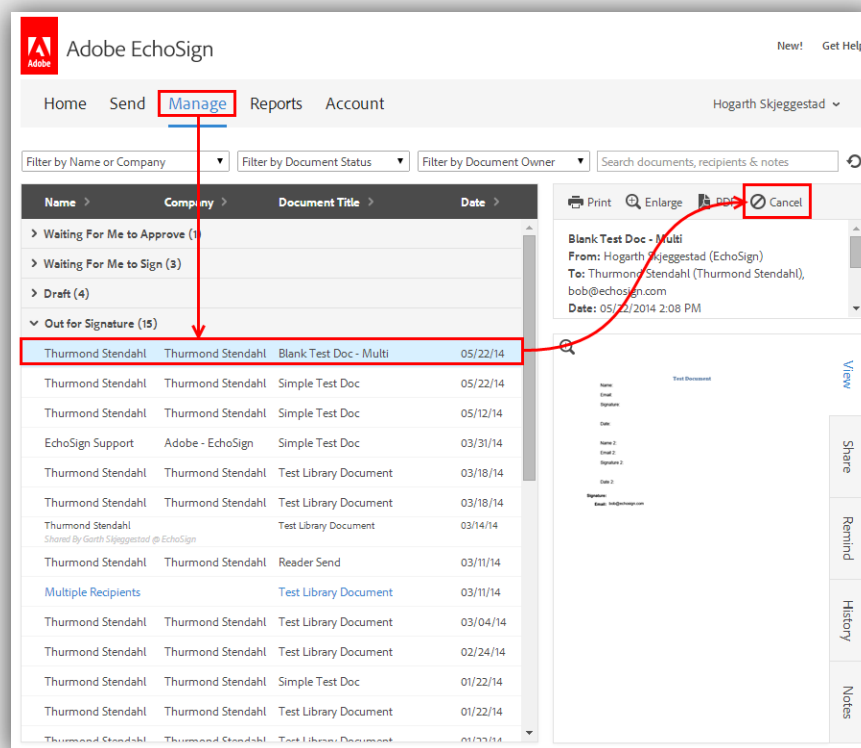
Managing agreements is an important part of EchoSign. Whether it's canceling an agreement or changing the signer, these processes allow you to influence the transaction's progress in the system.

Canceling a transaction

Did you accidentally send out the wrong document? Maybe you need to retract an agreement before it's signed. You can cancel a transaction as long as it is still waiting for signatures, whether it be yours or someone else's.

Go to your Manage page, click on an agreement and click Cancel

Only agreements that are waiting for a signature (yours or another signer), can be cancelled by the sender of the agreement.



Choose to notify signers, enter a message and click Cancel

You can choose to notify the signers of the cancellation, by checking the option. If you want to notify the signers of the agreement, you can enter a custom message they will receive in the cancellation email.

Cancel Agreement ?

Would you like to **Cancel** agreement Blank Test Doc - Multi?

☐ Notify other parties by email?

Reason:

Cancel



Excellent work!

The cancelled agreement will be moved to the Cancelled/Declined section of your Manage page.

Adobe EchoSign

New! Get Help

HomeSendManageReportsAccount

Hogarth Skjeggstad

Filter by Name or CompanyFilter by Document StatusFilter by Document OwnerSearch documents, recipients & notes

Name	Company	Document Title	Date
Thurmond Stendahl	Thurmond Stendahl	Simple Test Doc	01/22/14
Signed (7)			
Thurmond Stendahl	Thurmond Stendahl	Simple Test Doc	05/22/14
Garth Skjeggstad		Test Library Document	03/14/14
Shared By Garth Skjeggstad @ EchoSign			
Thurmond Stendahl		Test Library Document	03/13/14
Thurmond Stendahl	Thurmond Stendahl	Test Library Document	03/11/14
Thurmond Stendahl		Test Library Document	01/29/14
Thurmond Stendahl	Thurmond Stendahl	Simple Test Doc	01/22/14
Bob EchoSign		Test Document	09/23/13
Shared By Garth Skjeggstad @ EchoSign			
Cancelled/Declined (2)			
Thurmond Stendahl	Thurmond Stendahl	Blank Test Doc - Multi	06/05/14
Thurmond Stendahl	Thurmond Stendahl	Test Library Document	03/04/14
Archived (0) Upload Agreements			
Library Templates (4)			
Document Template	send	Other Users Test Template	03/25/14
Shared By Garth Skjeggstad @ EchoSign			
Document Template	send edit	Test Library Document	03/04/14
Form Field Template	edit	Test Form Field Layer	01/22/14
Document Template	send edit	Test Library Document	01/22/14

PrintEnlargePDFDelete

Blank Test Doc - Multi

From: Hogarth Skjeggstad (EchoSign)

To: Thurmond Stendahl (Thurmond Stendahl), bob@echosign.com

Date: 06/05/2014 7:24 AM

Cancel Agreement

You have successfully cancelled signing agreement: **Blank Test Doc - Multi.**

ViewShareRemindHistoryNotes

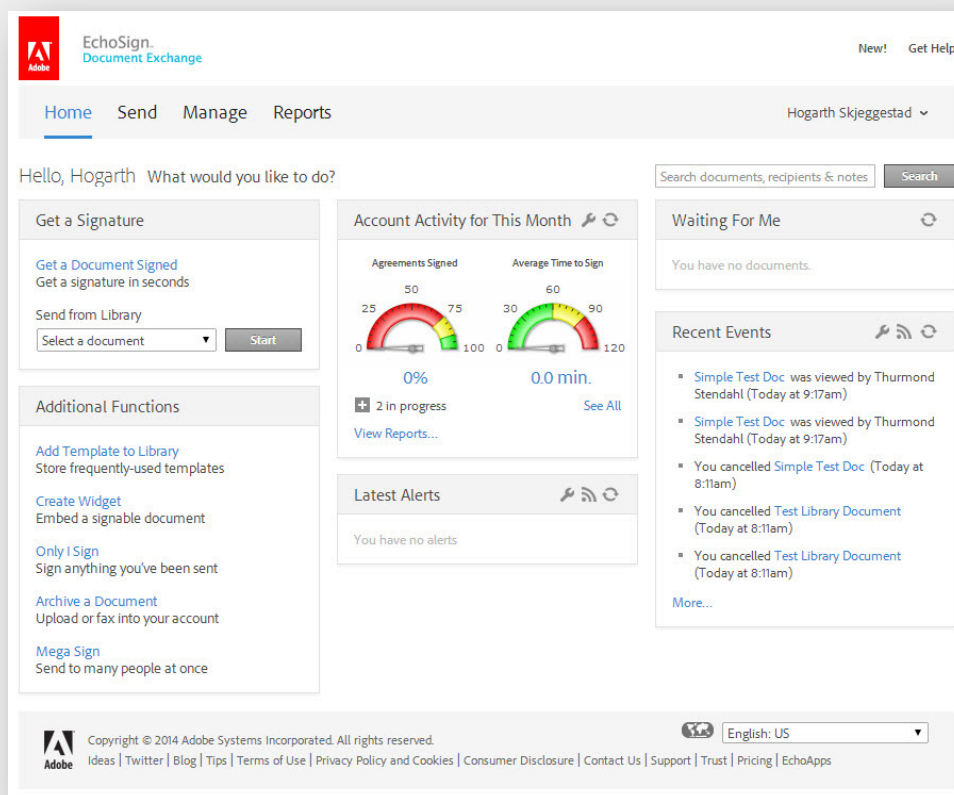


Overview of Pages

This section will go over the different areas of EchoSign and the pages you will visit often.

Home Page

The Home page is your dashboard for your EchoSign account. All of the workflows and processes can be accessed here. Statistics, events and activities will also be displayed on this page, making this a one-stop page for your agreements' progress.



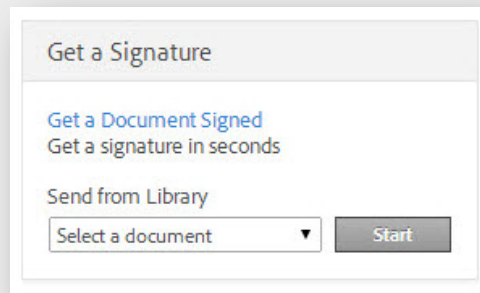
Navigation Bar

The Navigation bar is how you will access the different pages and functionality of EchoSign. The Send tab will take you to the Send page which allows you to set up, send, and sign your documents. The Manage tab will display a view of your transactions, and include their current status, as well as other details, and also will allow you to take certain actions on transactions. For Enterprise and higher level accounts you will also have an Account tab; this will take you to your profile where you can edit your settings (for accounts below the Enterprise level, you can access your profile by clicking on your name in the upper right hand corner of the screen and selecting My Profile).



Get a Signature

This panel is used for quick access to two basic workflows in EchoSign; getting a document signed and sending a library document. Clicking on **Get a Document Signed** will take you to the **Send** page. Choosing a library document from the dropdown menu and clicking the **Start** button will take you to the **Send** page with the library document attached.



Additional Functions

The Additional Functions pane gives quick access to common actions performed in EchoSign. The functions listed in this section can only be accessed from the **Home** page.

Add Template to Library

Templates include reusable documents and form field layers that can be applied to any transaction.

Create Widget

Widgets are available at the Enterprise and Global levels of service. A widget is a hosted agreement that can either be embedded with the provided Javascript or hosted to an EchoSign agreement URL.

Only I Sign

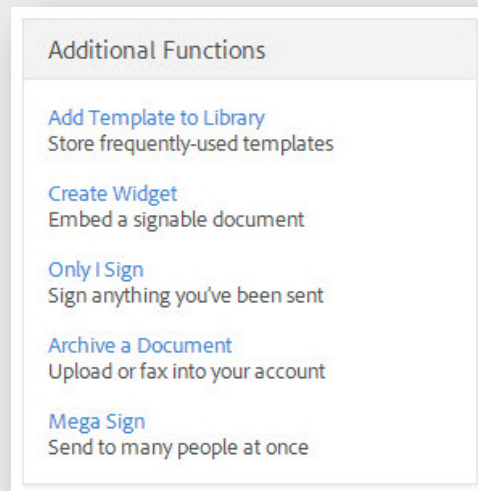
This process is used when you need to sign and send a document to someone. You will not be able to obtain a signature from someone else with this workflow.

Archive a Document

The archive function is used to upload signed documents to your account. Documents cannot be sent from the archive, it's only used to store documents that were signed not using EchoSign.

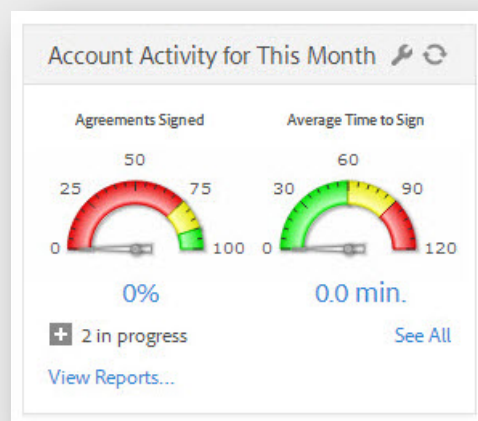
Mega Sign

Mega Sign is available at the Enterprise and Global levels of service. Mega Sign is a mass sending process used to get an agreement signed by multiple people. Each signer will get their own copy of the document to sign and each signed copy will be returned to you as the sender.



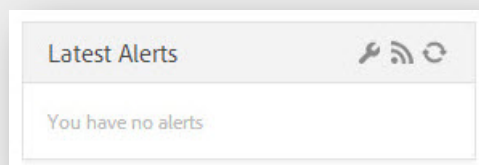
Account Activity for This Month

These gauges represent the number of agreements that have been signed for the current month and the average time it took for them to be signed. Transactions in progress can be accessed below the gauges.



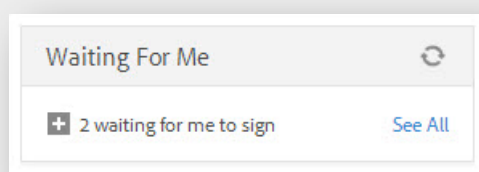
Latest Alerts

Alerts are linked to specific events that occur in the signing process. These can be adjusted under your **Personal Preferences** and consist of agreement emails not being viewed, agreements not being signed after a certain number of days and agreement expiration warnings.



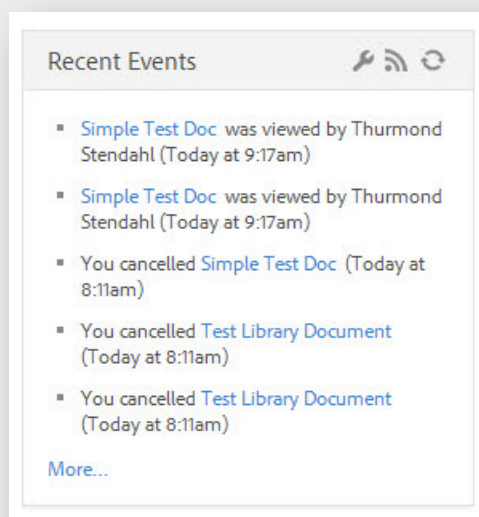
Waiting For Me

This section shows agreements that are waiting for you to sign. Expanding this list will provide links to the agreements.



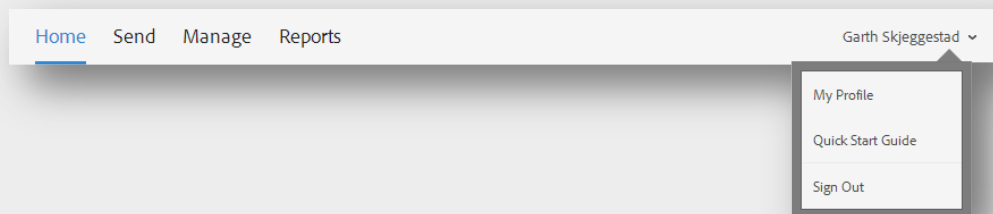
Recent Events

Events are specific actions for transactions that are out for signature. These can be adjusted under your **Personal Preferences** and consist of agreements sent, viewed, signed or declined and bounce notifications.



Accessing My Profile

The **My Profile** page is where you can access and update your personal information, change your email address and change your password.



Send Page

The **Send** page houses the most used process of EchoSign. Here you can send documents out to individuals to sign. The workflow on the Send page can be used to send single signer, multi-signer and counter-signer agreements.

Recipient Info and Signing Order

This section of the Send page is used to set who needs to sign the document you're sending.

Recipient Info

The **To:** field is where you enter the email address of the signer.

Get a Document Signed


To:

Show Cc

Recipients sign in Any Order Order Entered ?


☐ I need to sign

When you hit the spacebar or tab, a new recipient field will appear below the first.

To: 



Show Cc

Clicking on the Trash icon will remove this recipient from the list.

To: 

Show Cc

Clicking and dragging on the dots will allow you to change the order of the recipients you entered.

To:  

Show Cc

Signing Order

By default, signers sign the agreement in the order they are displayed on the Send page. If you change the signing order from **Order Entered** to **Any Order**, all of the signers will receive the agreement at the same time. Once they've all signed, the transaction will complete.

Recipients sign in Any Order Order Entered ?



I need to sign

If you also need to sign a document that will be signed by others, checking this option will allow you to do so.

A checkbox with the text "I need to sign" next to it.

Once this option is set, you can set whether you will sign first or last.

A button with a checkmark and the text "I need to sign", followed by two buttons labeled "First" and "Last".

Identity Verification

Per signer you can set a specific method of verifying the identity of the signer. This is used to further secure the transaction. A dropdown menu will sit next to the email address of the signer. This is where the method can be chosen.

A dropdown menu titled "Identity Verification" with a question mark icon. The menu is open, showing the following options: "Email delivery (default)" (selected), "Email delivery (default)", "Email delivery plus -", "Password", "Knowledge based authentication", and "Social identity".

Email Delivery

This is the default method of verification. A message with a link to the agreement is sent to the email address you entered.

Password

The Password option allows you to set a password to access the document to sign. This password must be passed to the signer outside of EchoSign and cannot be reset or retrieved if lost or forgotten.

A form with a dropdown menu labeled "Password". Below the dropdown are two input fields: "Password:" and "Confirm Password:".



Knowledge Based Authentication

Available at the Enterprise and Global levels of service, Knowledge Based Authentication prompts the signer to enter their social security number and then asks the signer questions pertaining to information on file with a third party vendor.

Social Identity

This method prompts the signer to login into a web identity prior to accessing the document.

Phone Authentication

Phone Authentication will allow you to have an automated text (SMS) message or phone call sent to the signers. This will give them a code they need to enter prior to signing. This method is only available at the Enterprise and Global levels of service.

Agreement Details

This is where you name the transaction, customize the message and (for Global levels of service) set the language of the message the signers will receive.

A screenshot of a web form titled "Agreement Details". It contains three fields: "Document Name:" with an empty text box, "Message:" with a text box containing the text "Please review and sign this document.", and "Language:" with a dropdown menu showing "English: US".

Send Options

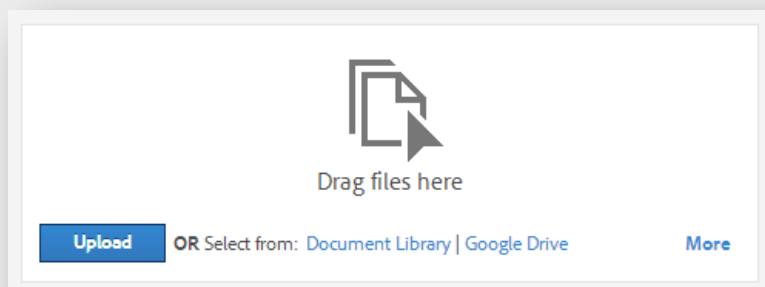
This section allows you to set a password for the signed document. This password will need to be sent to the signers outside of EchoSign. Once the user gets the completed document, they will need to enter the password to open the PDF. This password cannot be retrieved or reset if lost or forgotten.

A screenshot of a web form titled "Send Options". It has a checkbox labeled "Set password to open signed PDF" with a question mark icon to its right. Below this is a section titled "Signature Types" with a question mark icon. Under "Signature Types", there are two radio buttons: "E-signature" (which is selected) and "Fax Signature".

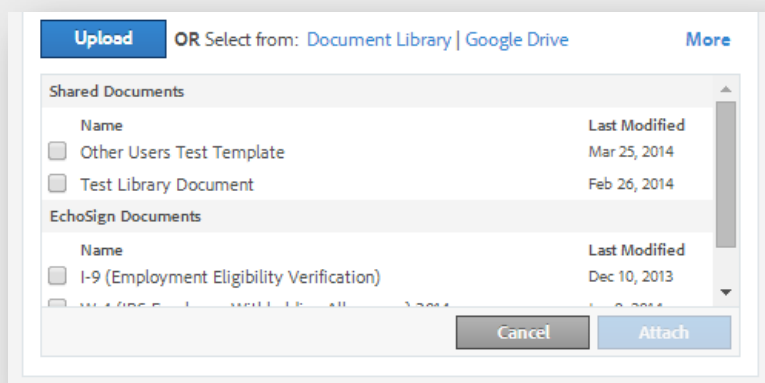


Document Upload and Attach

This area is used to attach and choose documents to send in your transaction. Files from your system can be dragged and dropped into the section or you can use the **Upload** button.



Clicking on the **Document Library** link will open a list of your library templates. Checking their respective boxes and clicking the **Attach** button will attach them to your transaction.



Preview, position signature or add form fields

This option will take you into the authoring environment when the **Next/Send** button is clicked. The authoring environment is where you add fields to your document for signers to interact with. This option is also used to get into the Prefill stage where you can enter information into fields before sending the document.





Manage Page

The Manage page is where all of your agreements are stored. This list of transactions is categorized depending on the agreement's status. Here you can take actions like cancelling an agreement, replacing a signer or sharing an agreement with another user.

Adobe® EchoSign® Get Help

Home Send **Manage** Reports Garth Skjeggstad ▾

Filter by Name or Company ▾ Filter by Document Status ▾ Filter by Document Owner ▾ Search documents, recipients & notes 🔍

Name >	Company >	Document Title >	Date >
▼ Waiting For Me to Sign (1)			
Thurmond Stendahl		Test Library Document	03/14/14
▼ Draft (1)			
Thurmond Stendahl	edit	Test Library Document	03/14/14
▼ Out for Signature (1)			
Thurmond Stendahl	Thurmond Stendahl	Simple Test Doc	05/06/14
▼ Signed (8)			
Thurmond Stendahl	Thurmond Stendahl	Test Library Document	03/14/14
Hogarth Skjeggstad	EchoSign	Test Library Document	03/11/14
Hogarth Skjeggstad	EchoSign	Test Widget	09/25/13
Hogarth Skjeggstad	EchoSign	Test Document!	09/25/13
Bob EchoSign		Test Document	09/23/13
Customer Support	EchoSign	Welcome to EchoSign!	09/23/13
Hogarth Skjeggstad	EchoSign	Text Tag Test	09/17/13
Hogarth Skjeggstad	EchoSign	Test Send	09/17/13
▼ Cancelled/Declined (4)			
Hogarth Skjeggstad	EchoSign	Text Tags	01/22/14
Hogarth Skjeggstad	EchoSign	Test Document!	01/22/14

Simple Test Doc
From: Garth Skjeggstad (EchoSign)
To: Thurmond Stendahl (Thurmond Stendahl)
Date: 05/06/2014 2:00 PM
Status: Out for E-signature

Print Enlarge PDF Cancel

View

Share Remind History Notes

Filters and Searching

These various filters change what agreements are displayed. The **Search Bar** can be used to locate specific transactions in different statuses.

Filter by Name or Company ▾ Filter by Document Status ▾ Filter by Document Owner ▾ Search documents, recipients & notes 🔍

Agreement List

All of your agreements will be listed here under the various categories depending on the current status. These categories can be collapsed and the list can be resorted by clicking the **Name**, **Company**, **Document Title**, or **Date** headers at the top.

By default, only the last 45 days of agreement will be displayed in the Agreement List. This is to ensure the best performance on various systems in various browsers. If you need to locate an



agreement or library template that is older than 45 days, just use the search bar. Entering "signed" or "library" will give you all of the documents in those categories.

Categories

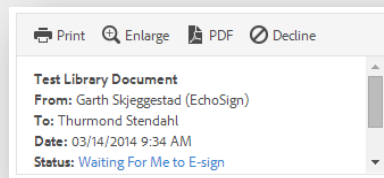
- **Waiting For Me to Sign** – This category show all of the documents that are waiting for your signature.
- **Draft** – These transactions have not been sent because the authoring process has not been completed. This will occur when you click to another page from the authoring environment. The edit link will allow you to pick up where you left off.
- **Out for Signature** – This lists the agreements that are currently waiting for others to sign.
- **Signed** – Completed agreement can be found under this category.
- **Cancelled/Declined** – All agreements that have either been declined by a signer or cancelled by you, can be found here.
- **Archive** – Documents uploaded to your account via the Archive a Document link, are placed under this category.

Name >	Company >	Document Title >	Date >
▼ Waiting For Me to Sign (1)			
Thurmond Stendahl		Test Library Document	03/14/14
▼ Draft (1)			
Thurmond Stendahl	edit	Test Library Document	03/14/14
▼ Out for Signature (0)			
▼ Signed (8)			
Thurmond Stendahl	Thurmond Stendahl	Test Library Document	03/14/14
Hogarth Skjeggstad	EchoSign	Test Library Document	03/11/14
Hogarth Skjeggstad	EchoSign	Test Widget	09/25/13
Hogarth Skjeggstad	EchoSign	Test Document1	09/25/13
Bob	EchoSign	Test Document	09/23/13
Customer Support	EchoSign	Welcome to EchoSign!	09/23/13
Hogarth Skjeggstad	EchoSign	Text Tag Test	09/17/13
Hogarth Skjeggstad	EchoSign	Test Send	09/17/13
▼ Cancelled/Declined (4)			
Hogarth Skjeggstad	EchoSign	Text Tags	01/22/14
Hogarth Skjeggstad	EchoSign	Test Document1	01/22/14
Hogarth Skjeggstad	EchoSign	Test Document1	01/22/14

Agreement Meta-data

This window displays information specific to the agreement. The information includes who the agreement was sent to, the date it was sent and its current status. You can also replace the current signer of the agreement and upload a signed copy of the document, if it was returned to you outside of EchoSign.

The buttons along the top of the window are actions you can take with the selected agreement. These allow you to print document, open it in a zoomed view, open it in your default PDF viewer or Decline (if you're signing)/Cancel (if out for signature)/Delete (if completed) the agreement.

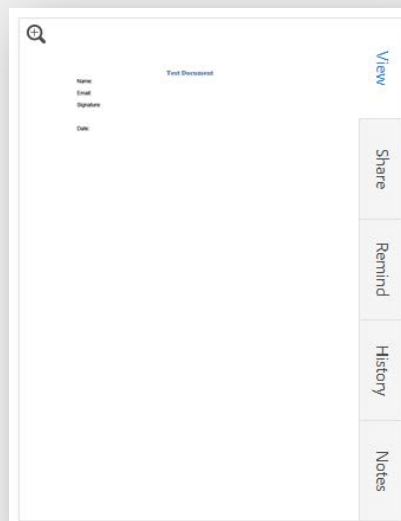


Agreement Tabs

The tabs in this window access information and additional actions for the selected agreement.

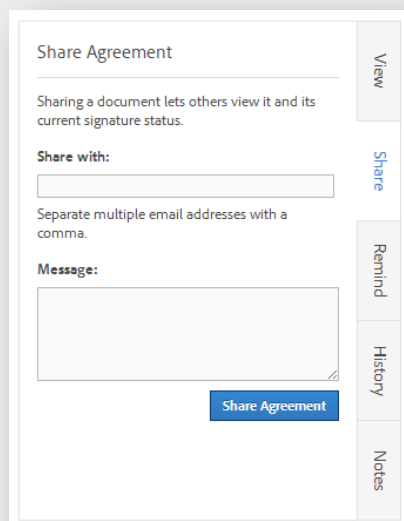
View Tab

The view tab displays a thumbnail of the first page on the agreement. Clicking the magnifying glass will take you to a zoomed view of the document (like the **Enlarge** option in the Meta-data).



Share Tab

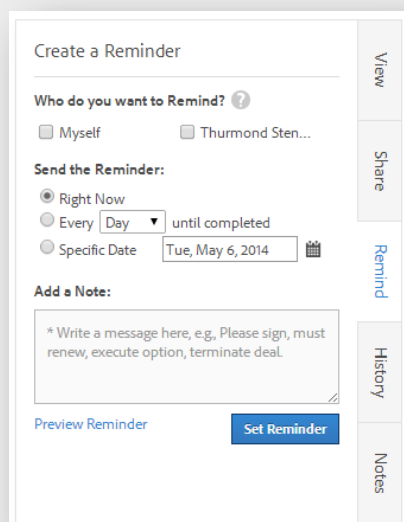
On this tab you can allow another EchoSign user to have read-only access to an agreement. They will not be able to control any aspect of the transaction, but they will be able to open the signed PDF from their Manage Page.



The 'Share Agreement' dialog box features a title bar 'Share Agreement' and a vertical sidebar on the right with tabs: 'View', 'Share' (highlighted), 'Remind', 'History', and 'Notes'. The main content area includes a sub-header 'Share Agreement', a descriptive text 'Sharing a document lets others view it and its current signature status.', a 'Share with:' label followed by an empty text input field, and a note 'Separate multiple email addresses with a comma.' Below this is a 'Message:' label followed by a larger empty text area. At the bottom right of the main area is a blue button labeled 'Share Agreement'.

Remind Tab

This tab lets you set a reminder for a transaction. A reminder sends an email to the remaining signers (in order), reminding them they still need to sign the document. You can set who these messages will go to, as well as the frequency you would like these messages sent.



The 'Create a Reminder' dialog box has a title bar 'Create a Reminder' and a vertical sidebar on the right with tabs: 'View', 'Share', 'Remind' (highlighted), 'History', and 'Notes'. The main content area includes a sub-header 'Create a Reminder', a question 'Who do you want to Remind?' with a help icon, and two checkboxes: 'Myself' and 'Thurmond Sten...'. Below is the 'Send the Reminder:' section with three radio buttons: 'Right Now' (selected), 'Every [Day] until completed', and 'Specific Date' with a date field 'Tue, May 6, 2014' and a calendar icon. The 'Add a Note:' section contains a text area with a placeholder message: '* Write a message here, e.g. Please sign, must renew, execute option, terminate deal.' At the bottom are a blue link 'Preview Reminder' and a blue button 'Set Reminder'.

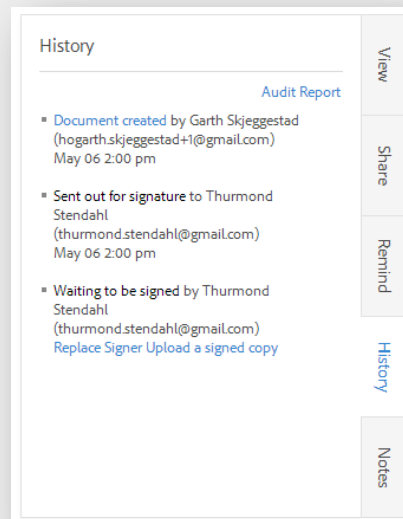


History Tab

The various events for an agreement can be found here. From the creation of the document to the recipient signing the agreement, each event for this specific transaction will be listed here.

You can also get an Audit Report here. An Audit Report is a detailed view of the events, including the IP addresses of the signers.

The History tab can also be used to replace the current signer or upload a signed copy of the agreement.



Notes Tab

Here notes can be added to an agreement. Notes are only visible to the individual that sent the agreement and will not be shared if the agreement is shared to another user.



Notes

Store any additional information about this document here.

Save Note

View

Share

Remind

History

Notes

My Profile

The Personal Preferences menu is used to access your personal information, various integrations and preferences. You get to this page by hovering over your name in the upper right hand corner and click My Profile.

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Get Help

Home Send Manage Reports

Garth Skjeggstad ▾

You have an EchoSign Global account.

My Profile

Quick Start Guide

Sign Out

Personal Preferences

▸ My Profile

Change Password

eFax Integration

Twitter Integration

Events/Alerts Preferences

My Signature

Language Preferences

First Name

Garth

Last Name

Skjeggstad

Initials

GS

Company

EchoSign

Job Title

Support

Phone Number

0000000000

Change Email Address

hogarth.skjeggstad+1@gmail.com

Confirm Email Address

hogarth.skjeggstad+1@gmail.com

Fax Area Code

212 (New York, NY) Stage ▾

Time Zone

(GMT-08:00) Pacific Time (US & Canada) ▾

☐ Yes, I would like to receive EchoSign's customer newsletter and updates on new features and services.

Update

Cancel

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My Profile

This page shows the information we have for you on file. This includes your name, what's set for your initials, company name, job title, email address used, fax area code and time zone.

This is the page where you can change the email address used for your account. An email address can only be in our system once, so make sure the address you want to use is not already in our system.

Change Password

This menu is used to change the password you use to login to EchoSign.

eFax Integration

If you use eFax's services, you can integrate your EchoSign with your eFax account.

Twitter Integration

This option allows you to link your Twitter account to your EchoSign account.

Events/Alerts Preferences

These settings alter the notifications you'll receive via email and what will show on your Home page under the Alerts and Events modules.

My Signature

If you want to upload images of your hand-written signature and initials, this menu will allow you to do so.



Account Setup

The following section will go through setup steps for your userID. As a user, there are only a few things to do to get you ready to go.

Upload Signature and Initials Images

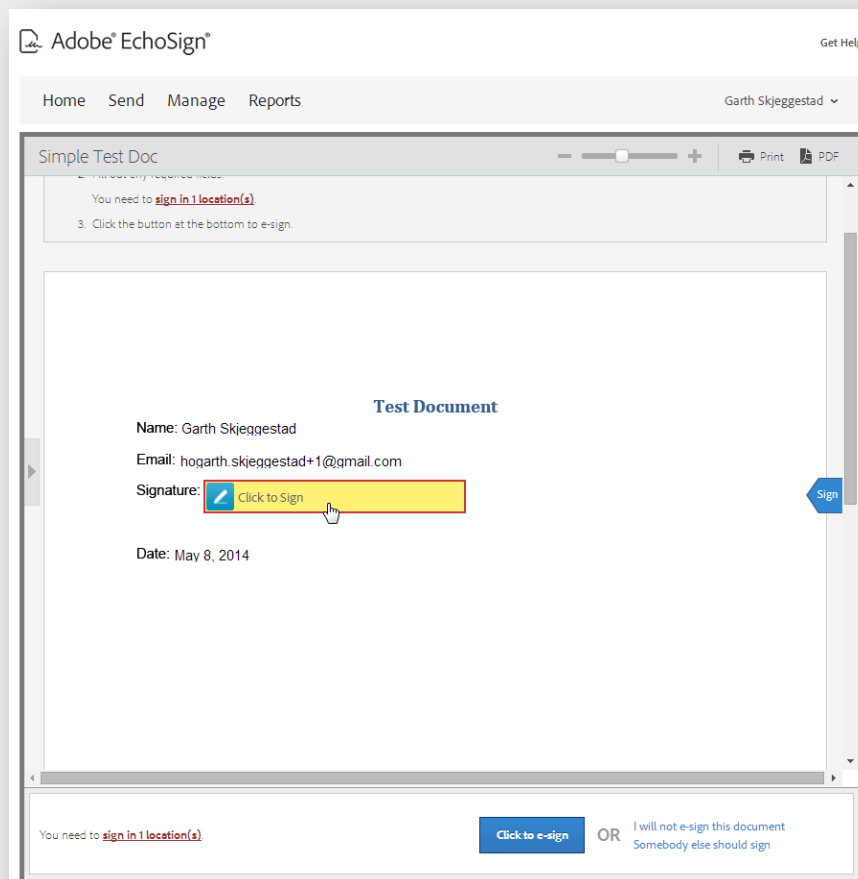
If you desire (and your account admins allows it) you can set your saved signature and initials as scanned or drawn images. This will replace the default scripted EchoSign signature and initials.

There are two methods for customizing your signature and initials.

Drawing your signature in EchoSign

The first method is saving your mouse or tablet drawn signature or initials when signing a document.

You can do this by sending a test transaction using the **Only I Sign** process. When you get to the signing environment click on a signature or initials field.



This will open the signing pane. Normally you would type your name and a signature would be generated. In this case click the **I would like to draw my signature** link.



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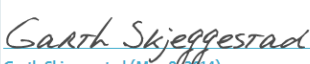
Home Send Manage Reports Garth Skjeggstad

Simple Test Doc Print PDF

You need to [sign in 1 location\(s\)](#)

3. Click to e-sign this document

1 Enter Your Name
 OR Provide your Social Identity [f](#) [in](#) [g](#) [?](#)

2 Review Your Signature

Garth Skjeggstad (May 8, 2014)
[I would like to draw my signature](#)

3

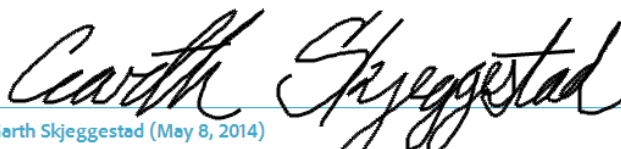
Date: May 8, 2014

[Click to e-sign](#) OR [I will not e-sign this document
Somebody else should sign](#)

The signature ~~are~~ will change to an interactive field where you can draw your signature. You can click the **Clear** link to start over. Once you have a signature you like, check the **Save as my signature** option and click the **Apply** button.

1 Enter Your Name
 OR Provide your Social Identity [f](#) [in](#) [g](#) [?](#)

2 Draw your signature ([Clear](#))

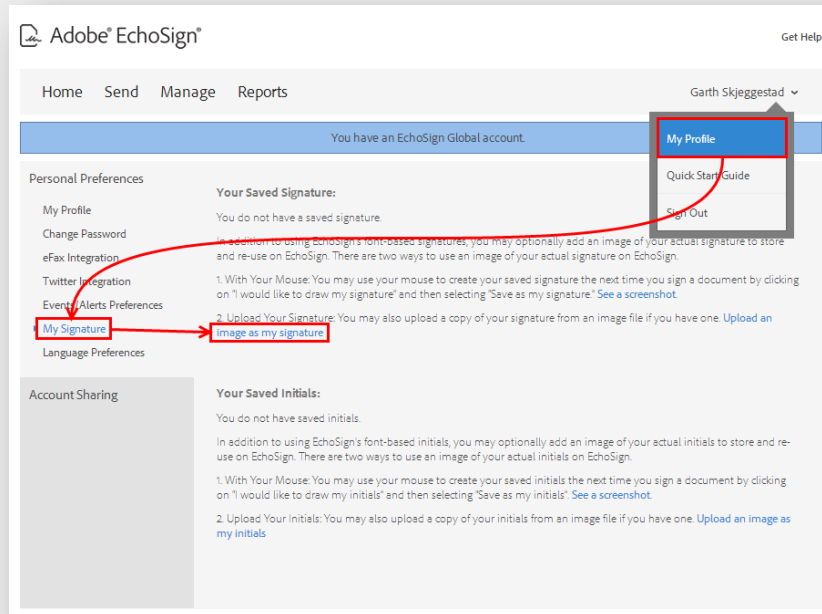

Garth Skjeggstad (May 8, 2014)
[I would like to type my signature](#)

3 ☒ Save as my signature

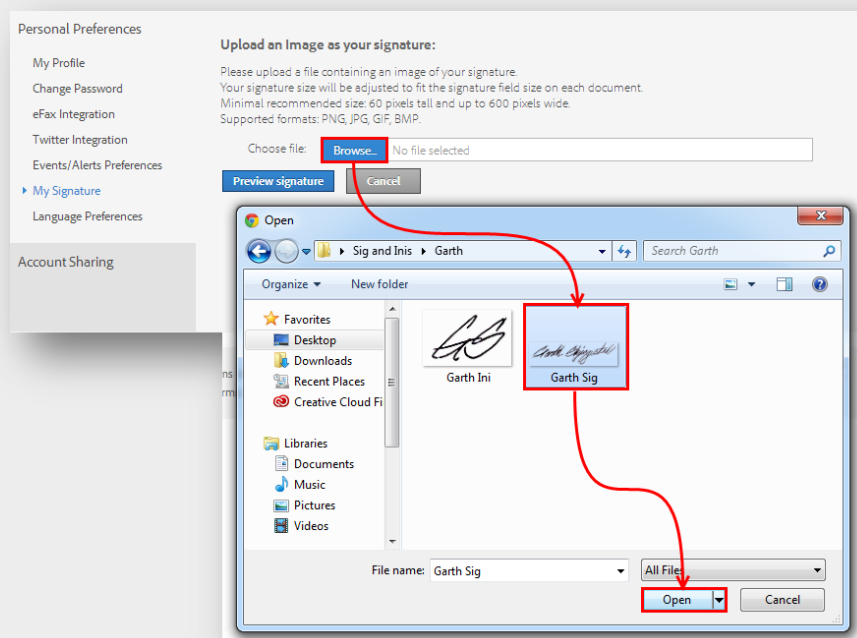
Uploading images

The other option is to upload images for your signature and initials. The signature image should be 60 pixels by 600 pixels. The initials image should be 60 pixels by 112 pixels.

To get to these options, hover over your name in the upper right hand corner, click on **My Profile**, **My Signature**, and **Upload an image as my signature**.



Click the **Browse** button, navigate to the image you'd like to use and click the **Open** button.





Once the image is loaded, click the **Preview Signature** button.

Personal Preferences

- My Profile
- Change Password
- eFax Integration
- Twitter Integration
- Events/Alerts Preferences
- My Signature**
- Language Preferences

Account Sharing

Upload an Image as your signature:

Please upload a file containing an image of your signature. Your signature size will be adjusted to fit the signature field size on each document. Minimal recommended size: 60 pixels tall and up to 600 pixels wide. Supported formats: PNG, JPG, GIF, BMP.

Choose file: Garth Sig.png

You'll be taken to a page where your signature image will be displayed as it will appear on a document. If you want to use a different image, click the **Let me try a different file** link. If you like how it looks, click the **Save this as my signature** button.

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Home Send Manage Reports Garth Skjeggstad ▾

Please review your signature image and confirm that it is correct.

You have an EchoSign Global account.


Personal Preferences

- My Profile
- Change Password
- eFax Integration
- Twitter Integration
- Events/Alerts Preferences
- My Signature**
- Language Preferences

Account Sharing

Upload an Image as your signature:

Preview your uploaded signature:



OR [Let me try a different file.](#)

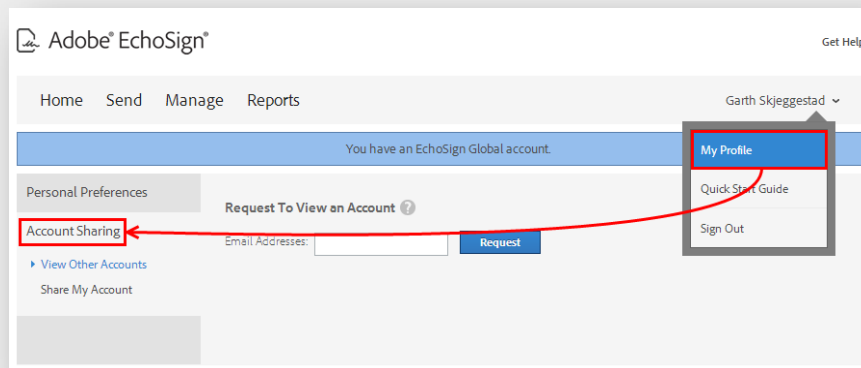
[Cancel - I will not upload an image as my signature](#)

Account Sharing

Shares between users allow the "sharee" to have visibility of the "sharer's" agreements. The user the agreements are shared to will not be able to change the agreement or transaction in anyway, they have read-only access.

This is generally used by account admins to see what their users are sending and to track progress on specific transactions or users.

Account sharing is accessed by going to My Profile and clicking **Account Sharing**.



View Other Accounts

If you need to view the agreements of another user, you will want to use this option. Once you enter the email address of the user and click the **Share** button, they will receive an email requesting the share. They can also access this request by going to the Account Sharing page.

Share My Account

If you need to share your account to someone else, enter the email address of the user and click the **Share** button. They will then see your agreements on their Manage page, as well as their own.

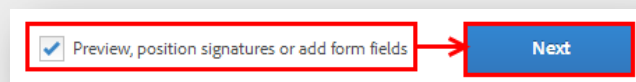


Authoring

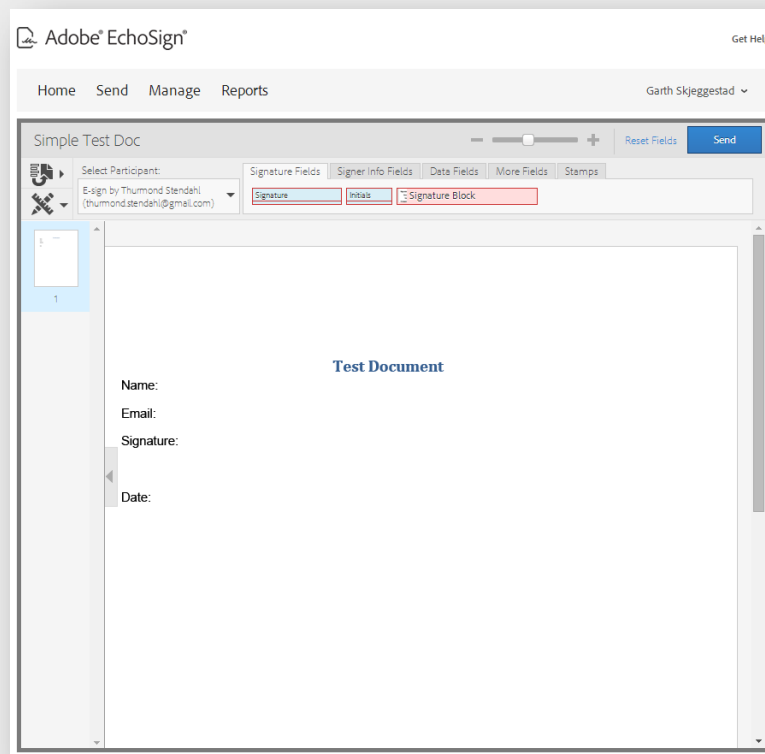
One the major parts of EchoSign is the authoring environment. This is where you place fields for the individuals you're sending the document to. When the signer goes to sign their document, they will be able to interact with the various fields assigned to them.

The authoring environment includes fields for specific data, as well as basic text fields and objects like radio buttons, dropdown menus and checkboxes. Fields have a number of properties you can set, allowing you to customize your document to your specific needs.

To get to the authoring environment, the **Preview, position signatures or add form fields** option needs to be checked on the Send page, before you click the **Next** button.



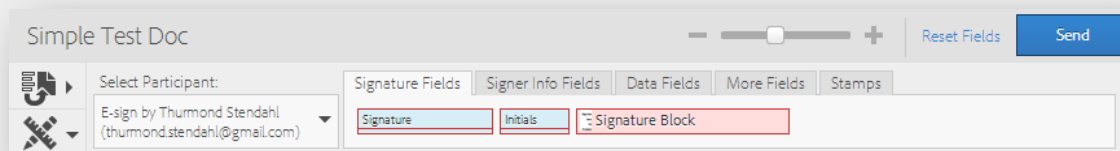
You will then arrive in the authoring environment. Bask in all its glory. This is where you will place fields for your various signers or for you to fill in prior to sending. There's a lot of features and sections on this page, but you will get familiar with them the more you use EchoSign.





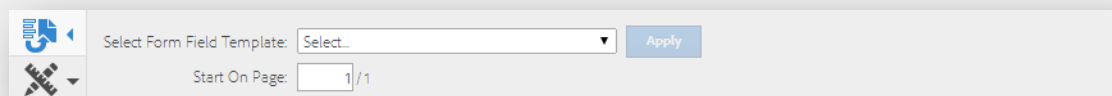
Fields and Tools Pane

This first section is where you will find all of the fields and tools you need when authoring your document.



Form Field Layer Template

This menu is used to apply a form field layer to your document. This is like a transparent layer that contains fields you can overlay onto your document. This is ideal for updating the underlying document without needing to change the field layout. The dropdown will list the field templates available and you can choose which page to start the template on.



Field Layout and Alignment

These tools are for aligning and resizing fields. You can control click on multiple fields to adjust them as a group. The field adjustments will be based on the field that is selected in Blue.



Participant Dropdown

This menu lists the participants for the agreement. When a specific participant is selected, the fields assigned to them will be highlighted and all fields dragged from the fields pane will be assigned to that participant.

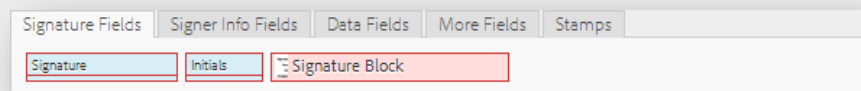


Fields Tabs

All of the fields available in EchoSign can be found in these tabs. They are categorized by how they are used and the field type.

Signature Fields

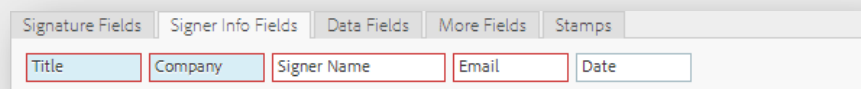
- The Signature field is a required field signers use to sign the agreement. At least one, required signature field with no conditions is required for each signer of a document.
- The Initials field is a required field signers use to initial the agreement. These do not replace the need for a signature field.
- The Signature Block is a collection of field that are required for the signer. If your account is set to require the signer's title and company, the fields will be added to the signature block.



The screenshot shows the 'Signature Fields' tab selected in a horizontal menu. Below the menu, three fields are visible: 'Signature' (highlighted in light blue), 'Initials' (highlighted in light blue), and 'Signature Block' (highlighted in light red).

Signer Info Fields

- The Title field is a required field signers use to enter their job title. This is linked to the signer's title on their My Profile page.
- The Company field is a required field signers use to enter their company. This is also linked to the signer's company on their My Profile page.
- The Signer Name field is a read-only field that is automatically populated with the name they enter when signing. If the user has registered their email address with EchoSign, this field will be automatically populated with the name on their My Profile page.
- The Email field is a read-only field that is automatically populated with the email address the agreement was sent to, for that signer.
- The Date fields is a read-only field that is automatically populated with the date the agreement is accessed and signed. This should not be used for custom or entered dates.



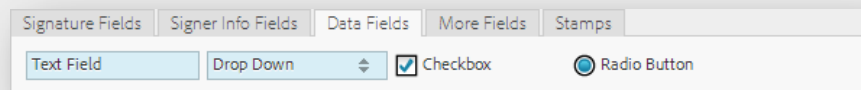
The screenshot shows the 'Signer Info Fields' tab selected in a horizontal menu. Below the menu, five fields are visible: 'Title' (highlighted in light blue), 'Company' (highlighted in light blue), 'Signer Name' (highlighted in light red), 'Email' (highlighted in light red), and 'Date' (highlighted in light blue).

Data Fields

- The Text field is a blank, plain text field that can be used for collecting specifically formatted data or used as a component of a larger group of field calculations. This

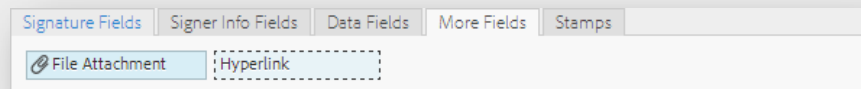
is the field to start with when you want to experiment with the various field properties.

- The Drop Down is used to create a list of options for the signer to choose from. Each drop down needs to have at least one option available and the options and export values cannot be blank.
- The Checkbox is an object the signer can toggle as checked and unchecked. These are best used in "Check all that apply" use cases.
- The Radio Button is an object that needs to be placed as a group. The signer can only pick on option from the group. These are best used in "Choose one and only one option" use cases.



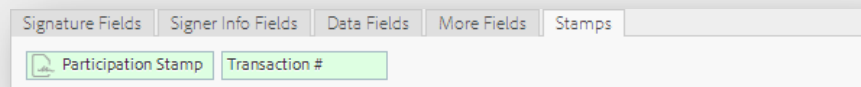
More Fields (Enterprise and Global levels of service)

- The File Attachment field is used for gathering files from customers. This can be used to get resumes, images of identification or documents.
- The Hyperlink object is a transparent object you can place over text you would like linked to a URL or another page in an agreement.



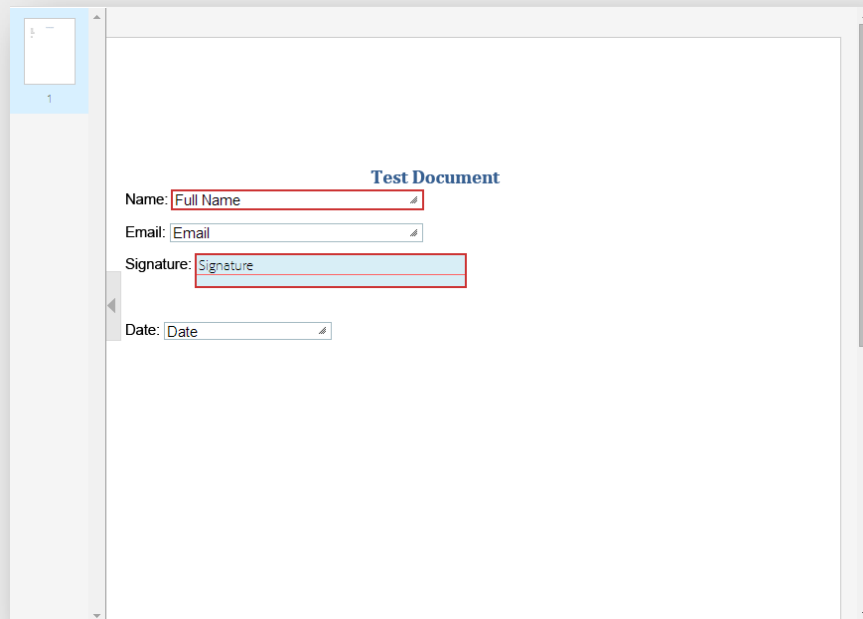
Stamps

- The Participation Stamp is applied after the agreement is signed by the assigned participant. The stamp includes the participant's name, signing time and email address.
- The TransactionID Stamp is applied to the final, signed PDF. This number is used as a reference number to the agreement.



Document Interface

This area is where you will place fields onto your agreement. Each page of your document will show in the pane on the left hand side of the interface.



Test Document

Name:

Email:

Signature:

Date:

Zoom, Reset and Save/Send

The remaining options allow you to zoom in and out of your document, reset or delete all of the fields you've placed or save/send the document in its current state. The Save button will only appear if you are creating a library document. In sending a document, this button will be Send.

As a best practice, you should save a library document often. If you have a particularly long document with a lot of fields, there's the potential your session could time out and all of your progress could be lost.





Sending

There are a number of ways you can send a document for signature; using EchoSign. As you use the system you will become more familiar with the various workflows, and we always promote exploration on your part.

This section will briefly go through the different sending processes, touching on the differentiating features. Additional information on processes can always be found in our knowledge base.

Only I Sign

This workflow is used to sign a document that only requires your signature. When setting up this process, you will set who the document needs to go to and add all of the fields you may need to fill in.

Only I Sign is found on the Home page, when logged into EchoSign.

A walkthrough of this process can be found [here](#).

Single Signer

Clicking Send will take you to the Send page. This is where "standard" sending processes can be setup. Here you enter the email address of your signer, specify if and when you need to sign the document, attach/upload your document, check the "Preview..." option, and click **Next**.

This will take you to the authoring environment, where you'll place all of the fields you need for the signer. Once you're done, click Send and the agreement will be off to the signer.

A walkthrough of this process can be found [here](#).

Multi Signer

This process is very similar to "Single Signer", but in this case you want to enter multiple email addresses into the **To:** field to have more than one person sign.

Under the **To:** field you'll find a toggle that changes which order the recipient's sign the document. By default, this is set to **Order Entered**. This means the signers will sign in the order they were entered. If your admin has allowed it, you can change this to **Any Order** to have all signers sign in any order.

Again, specify if you need to sign the document and when (first or last), name the document, enter your message, upload/attach your document, check "Preview..." and click **Next**.

Now that you're including multiple signers on this transaction, you will need to place fields for each signer. This is where the **Participant** dropdown comes into play. You will want to select the signer you want to place fields for, then place the necessary fields on the document. Make sure each signer has at least one required signature field assigned to them.

A walkthrough of this process can be found [here](#).

Husband & Wife Signing

Don't let the name fool you, this process is identical to the "Multi Signer" process, but instead of entering multiple email address the same email address is used more than once.



This is generally used for situations where the two individuals that need to sign, share an email address. The process works the same as "Multi Signer", in each signer will have their turn to sign, but in this case all email notifications will be received at the one address.

A walkthrough of this process can be found [here](#).

Mega Sign (Enterprise and Global levels of service)

The link to Mega Sign can be found on the Home page. This process allows you to send a document to hundreds of individuals at once. Each signer will sign their own copy of the document and these individual agreements will be returned to you.

This can be used to collect NDAs, HR documents, or permission slips. The workflow keeps the documents separate so you have a record for each signer, that isn't affected by another signer.

Mega Sign recipients can be entered by either adding the email addresses to the **To:** field or by uploading a .CSV file with the recipient's information included. The .CSV process allows you to prefill data for each signer, giving you the opportunity to customize the field information for each person.

A walkthrough of this process can be found [here](#).

Widgets (Enterprise and Global levels of service)

Widgets are hosted documents that can be signed by anyone who has access to them. These are ideal for sign-up sheets, waivers, or any document you need many people to access and sign online.

These can be generated in two different forms, Javascript or a URL. The Javascript option will provide code to have the widget embedded into your website. The URL option provides a web address hosted by EchoSign you can link signers to.

While the widget signing experience is the same as a regular transaction through EchoSign, widgets can only be signed by one signer and counter-signed by the creator of the widget. This is something to keep in mind when creating the widget, as the user who creates it may not be the person who counter-signs.



Templates

If you have documents you plan on using often, uploading them and creating templates will save you time when sending out agreements.

Document Template

A document template is a reusable document. Document templates can be shared to other users in your account, allowing multiple users to send out the same document without needing to make any changes.

Document templates can also be edited. If you need to change field properties or move fields around, you can do so from the Manage page. All authoring tools are available when creating a document template.

A walkthrough of this process can be found [here](#).

Form Field Template

This is a reusable field layer that can be applied to any document and is used when a document needs to be updated due to revisions, but the fields are in the same place. Instead of creating a new library document every time a document is updated, the same form field layer can be applied.

Form field templates can be edited, to facilitate changes in the arrangement of fields or field properties. Again, all authoring tools are available when creating a form field template.

A walkthrough of this process can be found [here](#).