



ADOBE ECHOSIGN USER GUIDE

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ECHOSIGN OVERVIEW

SEND

Get a Document Signed

To: [Show Cc](#)

Recipients will sign in the order they are entered [change](#)

Document Name:

Message: Please review and sign this document.

Language: English: US

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

Signature Options ([What's the difference?](#))

☒ e-Signature ☐ Fax Signature

☐ I need to add my signature to this document ☐ Verify signer identity using a password [?](#)

☐ Preview, position signatures or add form fields ☐ Password protect the signed document [?](#)

[Send](#)

To: Signers' email addresses
Cc: Anyone who needs a copy
Name your document
Add a custom message

"Getting A Signature Has Never Been Easier"

SIGNATURE OPTIONS

☐ I need to add my signature to this document

Click on 'Change Order' to change the order of when you sign.

☒ I need to add my signature to this document

Recipients sign first, then I sign last

[Change Order](#)

☐ **Preview, position signatures or add form fields**

Check this box to place signatures, initials, and form fields in the document before sending it out for signature.

☐ **Verify signer identity using a password**
☐ **Password protect the signed document**
Password Protection

The PDF file that you send to everyone will be encrypted and this password will be required to open it.

Don't lose your password as *they are not recoverable*. In the event that you do lose the password, you'll need to delete that transaction and begin again.

Signer Identity Verification

Ensure that before signers can view or sign the document, they have to verify access to their email account AND verify their identity.

Signing Password:

Require Signers to enter a one-time password you specify.

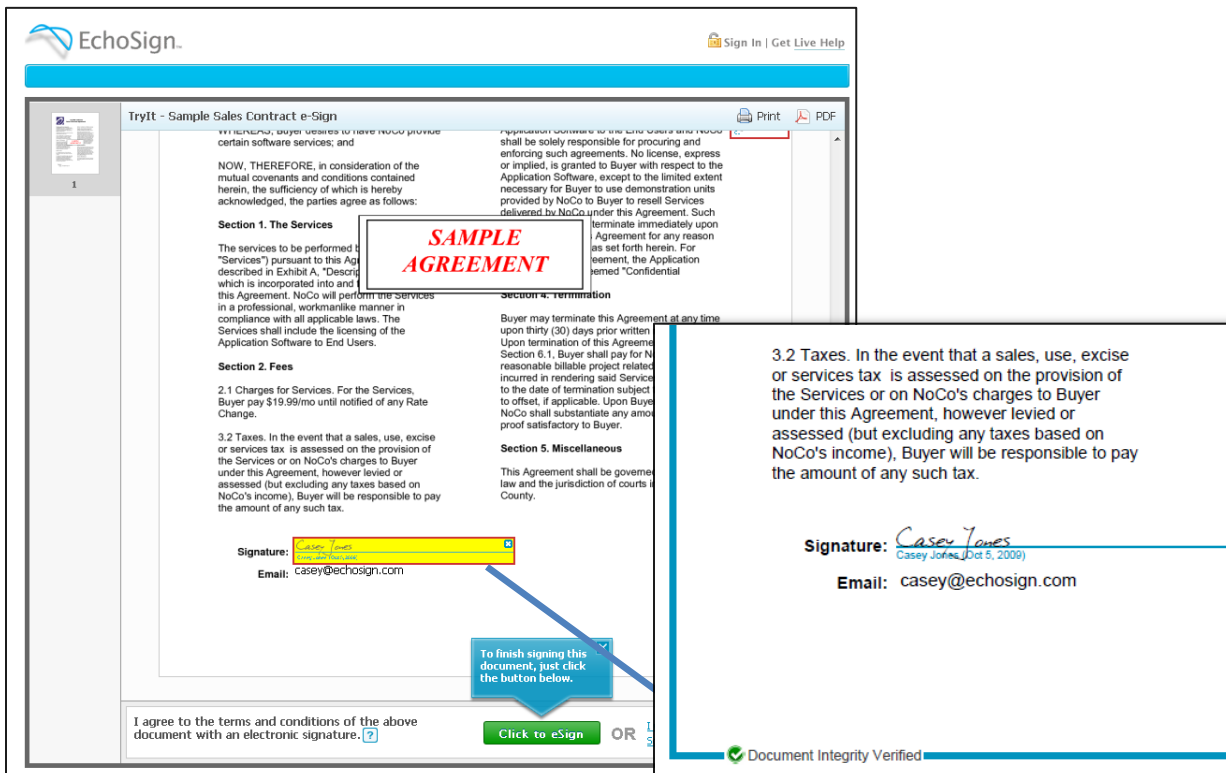
SIGN

Signer receives email notification about document to sign.



Signer clicks link highlighted in email.

Signer signs effortlessly from any web browser on any device.




FAX SIGNATURES

Please sign the NDA.



Amy Wang

Sent: Friday, May 11, 2012 3:24 PM


To: Amy Wang

 **NDA.pdf (702 KB)** [Preview](#)


Print and sign the attached PDF document.

EchoSign
You send. They sign. It's done.™



Send. Sign. Done.™



CONDITIONS AND NON-DISCLOSURE AGREEMENT

THIS AGREEMENT made and effective this date, February 28, 2006, by and between Global Electronics, a Pennsylvania corporation, having its office at 1300 Seventh Avenue, Pittsburgh, PA 15212 ("GLOBAL ELECTRONICS") and (Private Inc., and their subsidiaries and affiliates) ("Service Provider").

WHEREAS, it is expected that with business transactions between the parties may involve the disclosure and receipt of information by GLOBAL ELECTRONICS of information not in the public domain, including technical and financial information;

WHEREAS, the parties wish to define their rights and obligations with respect to information disclosed by GLOBAL ELECTRONICS to the "Service Provider", and to protect any proprietary and confidential information;

NOW, THEREFORE, in consideration of the above premises, it is agreed as follows:

Non-Disclosure:

- Information disclosed by GLOBAL ELECTRONICS to the "Service Provider" shall be restricted and confidential. It is a trade, technology or confidential secret of GLOBAL ELECTRONICS or Global Electronics customer. It is designated as "confidential" or "proprietary" by GLOBAL ELECTRONICS. Such information ("Confidential Information") shall be subject to the terms of this Agreement. Information disclosed by this Agreement to the recipient, for a limited, type and terms of Confidential Information disclosed by GLOBAL ELECTRONICS shall be subject to the terms of this Agreement and GLOBAL ELECTRONICS may refuse to disclose information if it believes that it is not in its best interest to do so.
- Notwithstanding anything to the contrary contained in this Agreement, the obligation of non-disclosure imposed herein shall not apply to any portion of the Confidential Information that the "Service Provider" has independently learned and disseminated.
- It is not to be disclosed through any third party, to employees, agents or representatives.
- It is hereby confirmed that no independent third party without any restriction will be an obligor of confidentiality or
- It is independently developed by the "Service Provider" without any knowledge or use of the Confidential Information.
- The "Service Provider" agrees that the Confidential Information shall be used solely for the purpose of developing, providing, installing, servicing and creative services for the customer provided by Global Electronics. Confidentiality of all rights in the proprietary and confidential information required to the Confidential Information are reserved by GLOBAL ELECTRONICS, and the "Service Provider" will not use or disclose such proprietary and confidential information in the event of any breach of the Confidential Information. The "Service Provider" shall not use or disclose such Confidential Information to any third party. The "Service Provider" shall not use or disclose such Confidential Information to any third party.

GLOBAL ELECTRONICS

CONFIDENTIAL NON-DISCLOSURE AGREEMENT

Amy Wang Has Sent You NDA to Sign.

Amy Wang (amwang) says:
"Please review and sign NDA."

Please print, sign and fax back the attached NDA. A cover sheet with my EchoSign fax number is included. After you sign the NDA, everyone will be e-mailed a signed PDF copy.

Do you need to forward this to a party authorized to sign it? [Click here](#)



You must use this as your coversheet

1. Sign your document if needed
2. Use this coversheet with your document & fax to 1 888

Problem faxing to this number? Try

To: Amy Wang From: Amy Wang
Date: 05/11/2012 03:24PM PDT Re: NDA

DO NOT WRITE IN THIS AREA. FOR ECHOSIGN USE ONLY.

Notice: EchoSign servers will remove this cover page before final delivery. Messages written on this page will be discarded.



Secure Routing Code: 633075260446
Notice: EchoSign scanned documents are encrypted and unalterable.



Fax back using coversheet provided.

TRACK & MANAGE

The screenshot shows the Adobe EchoSign Document Exchange interface. At the top, there's a navigation bar with tabs: Home, Send, Manage, Reports, and Account. Below this is a search bar with filters for 'Filter by Person or Company', 'Filter by Status', and 'Filter by Document Owner'. A search bar is also present: 'Search documents, recipients & notes'. The main content area displays a list of documents categorized by status: 'Waiting For Me to Sign (5)', 'Waiting For Me to Review (1)', 'Draft (2)', 'Out for Signature (8)', 'Signed (28)', 'Cancelled/Declined (5)', and 'Archived (0)'. The 'Out for Signature' category is expanded, showing a list of documents with columns for Name, Company, Document Title, and Date. A document titled 'Statement of Work' by Amy Wang (Adobe Test) is highlighted. To the right, a detailed view of this document is shown, including a 'Statement of Work' header, a 'From' field (Amy Wang (Adobe)), a 'To' field (Amy Wang (Adobe Test)), a 'Date' (05/11/2012 1:30 PM), a 'Status' (Out for E-signature), and a 'Message' (Please review and sign this). The document content is visible, showing sections like 'Local Needs Assessment' and 'Database Best Practices'. On the right side of the document view, there are buttons for 'View', 'Share', 'Remind', 'History', and 'Notes'.

Signature Status

- Waiting for Signature
- Out for Signature
- Signed
- Cancelled/Declined
- Archived

Search

- By Person or Company
- By Signature Status
- By Document Owner
- By any input – email, sign date, notes field

Manage Tabs

View. See a thumbnail image of the document - then enlarge, review or print.

Share. Forward a copy of the document to anyone who needs it - supervisor, colleague or support staff.

Remind. Send a reminder to yourself or the recipient - once, daily or weekly.

History. View the history of all agreement events – who, when, what.

Notes. Add notes to the agreement record.

HOW TO USE ECHOSIGN

EchoSign is the web's #1 electronic signature service allowing you to get your documents signed in minutes rather than days. EchoSign accelerates your document signing process with instant fax or e-signatures, tracks your team performance and their contracts' status in real time and stores all your signed agreements. Learn more on <http://www.echosign.com>

WATCH A VIDEO

Watch this video to get a quick overview of how easy it is to use Adobe EchoSign:

<http://www.echosign.com/public/static/echoSignVideo.jsp>

SIGN UP FOR WEBINAR

Sign up for the Adobe EchoSign webinar to learn more about the benefits of using the service:

<http://www.echosign.com/public/webinar.jsp>

ADOBE ECHOSIGN SUPPORT PORTAL

Visit the Adobe EchoSign Support site to access many resources and helpful information including FAQs, Knowledge Base Articles, and Support:

<http://www.echosign.com/public/static/support.jsp>

Go to the Adobe EchoSign Knowledge Base to view step-by-step documentation and useful information about the service: <http://echosign.force.com/knowledgebase>

CREATE AN ACCOUNT

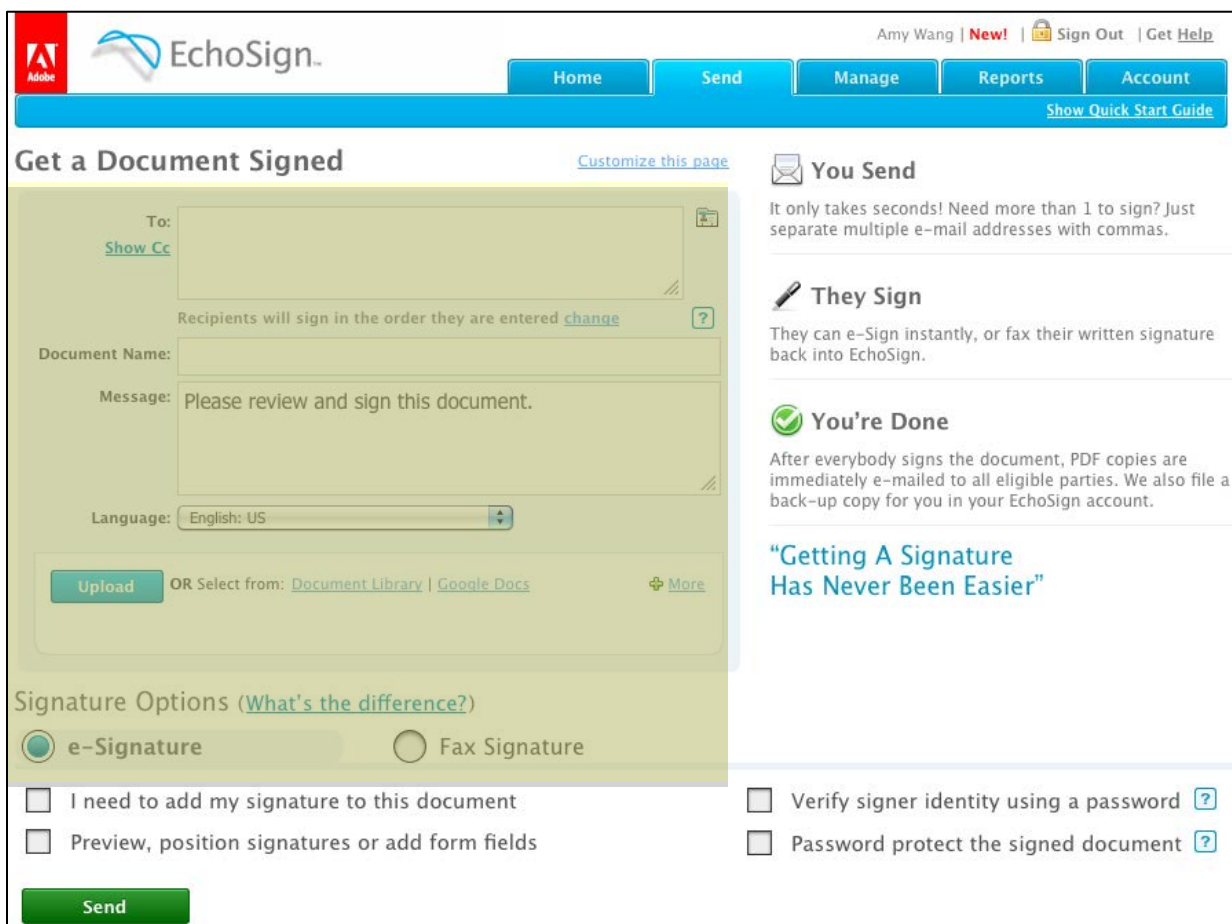
- To sign up for a free account, go to: <http://www.echosign.com/public/register>
- To learn more about Adobe EchoSign pricing plans and how to sign up for a free trial of an Team, Enterprise, or Global account, go to: http://www.echosign.com/public/static/cost.jsp?cs=mktg_topnav
- After you complete the registration form, check your email inbox for a verification email. Click the link to verify your email address and start using Adobe EchoSign.
- Sign into Adobe EchoSign from: <https://secure.echosign.com/public/login?r>

THIRD PARTY INTEGRATIONS

Adobe EchoSign is also integrated directly with some third-party systems including Salesforce.com, NetSuite, Microsoft CRM, SugarCRM, Google Apps, and others. Go to <http://www.echosign.com> and click on the Product tab to learn more.

SEND DOCUMENT FOR SIGNATURE

- Go to the **Send** tab
- Input recipient email addresses
- Attach document(s) requiring a signature
- Select whether the document should be signed with an e-signature or by fax
- Choose any other Signature Options
- Click 'Send'



The screenshot shows the Adobe EchoSign 'Send' interface. At the top, there's a navigation bar with tabs: Home, Send (active), Manage, Reports, and Account. The user is logged in as Amy Wang, with links for 'New!', 'Sign Out', and 'Get Help'. A 'Show Quick Start Guide' link is also present.

The main section is titled 'Get a Document Signed' with a 'Customize this page' link. It contains a form for sending a document. The 'To:' field has a 'Show Cc' link. Below it, a note states 'Recipients will sign in the order they are entered' with a 'change' link and a help icon. The 'Document Name:' field is empty. The 'Message:' field contains the text 'Please review and sign this document.' The 'Language:' dropdown is set to 'English: US'. There are 'Upload' and 'More' buttons, and a link to 'Document Library | Google Docs'.

Below the form, there are 'Signature Options' with a link 'What's the difference?'. The 'e-Signature' option is selected, and the 'Fax Signature' option is unselected. There are four checkboxes for additional options: 'I need to add my signature to this document', 'Preview, position signatures or add form fields', 'Verify signer identity using a password', and 'Password protect the signed document'. Each checkbox has a help icon. A green 'Send' button is at the bottom left.

On the right side, there are three informational sections: 'You Send' (explaining that it only takes seconds and multiple email addresses can be separated by commas), 'They Sign' (explaining that recipients can e-sign instantly or fax their signature back), and 'You're Done' (explaining that PDF copies are immediately e-mailed to all eligible parties and a back-up copy is filed). A quote at the bottom right reads: 'Getting A Signature Has Never Been Easier'.

POSITION SIGNATURES, INITIALS, AND FORM FIELDS

On the Send page, choose the option to position signatures or form fields.


The screenshot shows the Adobe EchoSign 'Send' page. At the top, there's a navigation bar with 'Home', 'Send', 'Manage', 'Reports', and 'Account'. Below this, the 'Get a Document Signed' section includes a 'To:' field with a 'Show Cc' link, a 'Document Name' field, a 'Message' field with the text 'Please review and sign this document.', and a 'Language' dropdown set to 'English: US'. There's an 'Upload' button and a link to 'Document Library | Google Docs'. To the right, a 'You Send' section explains the process, and a 'They Sign' section describes how recipients can sign. Below these, a 'You're Done' section states that PDF copies are emailed after signing. A quote 'Getting A Signature Has Never Been Easier' is also present. The 'Signature Options' section has two radio buttons: 'e-Signature' (selected) and 'Fax Signature'. Under 'e-Signature', there are checkboxes: 'I need to add my signature to this document', 'Preview, position signatures or add form fields' (highlighted in yellow), 'Verify signer identity using a password', and 'Password protect the signed document'. A green 'Send' button is at the bottom.

- Drag and drop signatures, initials, and form fields to the desired locations on the document
- Click 'Send'

The screenshot shows a tax form, likely a 1040, with the 'Part II Certification' section highlighted. At the top, there are input fields for 'Signature', 'Initials', 'Title', 'Company', 'Name', 'Email', 'Date Signed', 'Form Field', and 'Checkbox'. Below these, the 'Part II Certification' section contains instructions and a certification statement. The instructions state: 'Under penalties of perjury, I certify that: 1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me), and 2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding, and 3. I am a U.S. citizen or other U.S. person (defined below). Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the Certification, but you must provide your correct TIN. See the instructions on page 4.' The certification statement reads: 'I am a U.S. citizen or other U.S. person (defined below).'. Below the certification, there are fields for 'Sign Here', 'Signature of U.S. person', 'Signature', and 'Date Signed'.

Once the document is signed it is sent as a PDF via email to all parties to the transaction. A backup copy is also placed in your Adobe EchoSign account.

- Go to the **Manage** tab
- Search for a document using the drop down menus and search box
- Share a copy of the document with another party
- Set Reminders -instant, every day, or every week
- View History to find out when a document was sent out for signature, when a document viewed by the recipient, and when a document signed
- Add Notes to the agreement record



[Home](#)
[Send](#)
[Manage](#)
[Reports](#)
[Account](#)

[Sign Out](#)
[Get Help](#)

[Show Quick Start Guide](#)

Filter by Person or Company
Filter by Status
Filter by Document Owner
Search documents, recipients & notes
[Start Over: Reset Options](#)

Name ▶	Company ▶	Document Title ▶	Date ▶
▼ Waiting For Me to Sign (5)			
Amy Wang	amwang	Acme Corp Sales Agreement	02/28/12
Amy Wang	amwang	test	02/27/12
Amy Wang	amwang	test	02/27/12
Amy Wang	amwang	test	02/27/12
Amy Wang	Adobe Systems	Trylt - Sample Corporate Complian	10/10/11
▼ Waiting For Me to Review (1)			
Amy Wang	review	Press release	10/10/11
▶ Draft (2)			
▼ Out for Signature (8)			
Amy Wang	Adobe Test	Statement of Work	05/11/12
Amy Wang	Adobe Test	Sales Contract	05/11/12
tylercjackson@gmail		provision test	03/29/12
tylercjackson@gmail		sample	03/06/12
Amy Wang	amwang	test	03/06/12
Celia Anderson	Adobe Systems	test	01/18/12
ericwithamy@yahoo.c		Test	01/18/12
Amy Wang	Self	Hello	08/11/11
▶ Signed (28)			
▶ Cancelled/Declined (5)			
▼ Archived (0)			

[Upload Agreements](#)

Print
 Enlarge
 PDF
 Cancel

Statement of Work

From: Amy Wang (Adobe)

To: Amy Wang (Adobe Test)

Date: 05/11/2012 1:30 PM

Status: **Out for E-signature**

[Replace Signer](#)

Message: Please review and sign this

Statement of Work for Local
Page 1 of 1

The following is a statement of work to be performed by GlobalCorp in Redford, NJ for the City of Meriden (hereinafter "Contractor").

I. Local/Needs Assessment

A. Background

Since 1980, Local has provided businesses and organizations what they need to be successful and successful to and around the heartland of Meriden.

B. Goal

The City of Meriden Endorsement, provided by Local, is where more than thousands of the area's leaders, influencers, agents and business decision makers of all levels and backgrounds gather to shape the future of our city and to gain a competitive edge through intensive knowledge sharing and expert networking opportunities.

City of Meriden Endorsement provides an excellent alternative for the city to hire from it's rich history to its diverse culture to its broadest base of networking.

Local is expanding the phases of Local presentation. The Local Endorsement has two rounds of seeking your attention and follow-ups from our presentation efforts. The June 15, 2012 Local Endorsement event registration information to previous conference attendees.

When Local presentation efforts will begin in September of 2012 to its database of clients, GlobalCorp will explore a model to drive greater attendance to the Local Endorsement landing page where they may then register for the event.

It is understood that the total number of persons who register will depend upon several factors: the personal agenda, experience and knowledge, quality of the event, and the existing needs of the contract companies local.

II. Service

A. Database Best Practices

GlobalCorp provides the strategic information database resources for marketing efforts, for conducting an effective and efficient presentation within the Local Endorsement will incorporate the following best practices: active reporting and system of evaluation, just in time reporting and continuous monitoring of statistical data, meaningful opportunities, diverse audience cultural practices, and record analysis.

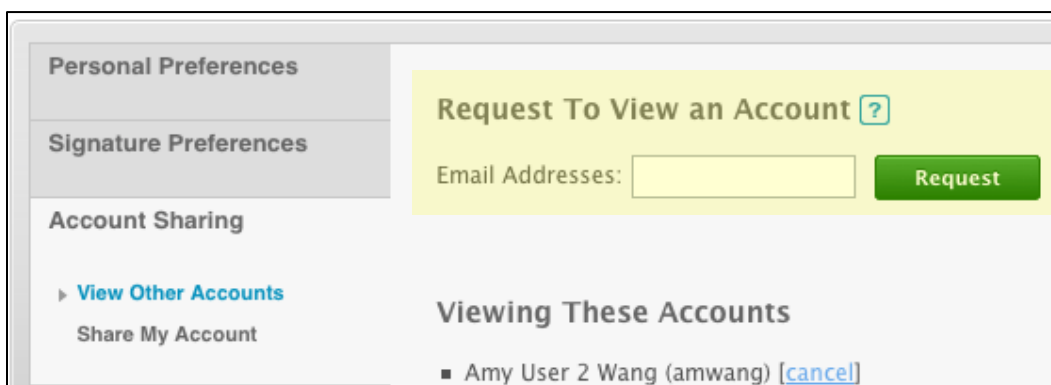
[View](#)
[Share](#)
[Remind](#)
[History](#)
[Notes](#)

GlobalCorp | Telephone: 908-211-0700 | [support@globalcorp.com](#) | [www.globalcorp.com](#)

ACCOUNT MANAGEMENT

ACCOUNT SHARING

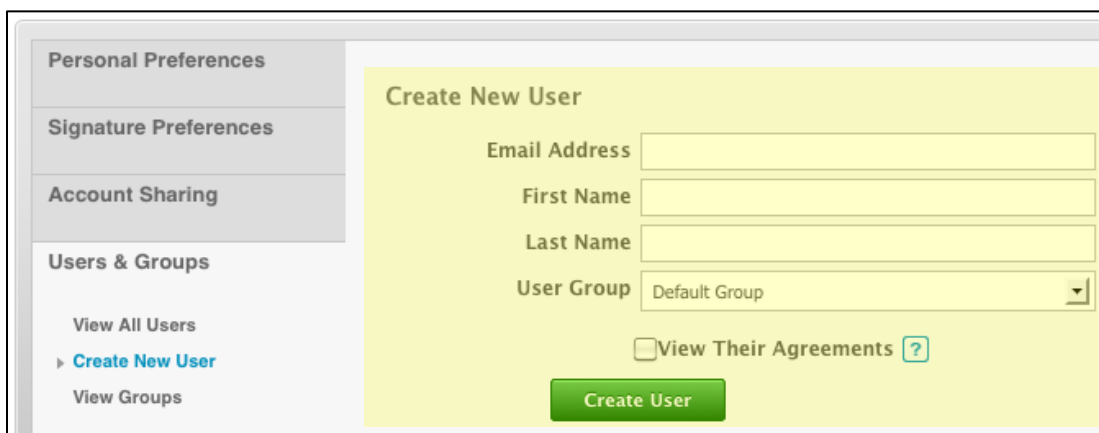
- Log into your account and go to the Account tab
- Under the section Account Sharing, go to View Other Accounts
- Add email address i.e. manager's email
- Click 'Request'
- An email will be sent to the email address entered to request account sharing



The screenshot shows the 'Account Sharing' section of the Adobe EchoSign interface. On the left, a sidebar contains links for 'Personal Preferences', 'Signature Preferences', 'Account Sharing', 'View Other Accounts' (highlighted), and 'Share My Account'. The main content area is titled 'Request To View an Account' with a help icon. It features a text input field for 'Email Addresses' and a green 'Request' button. Below this, a section titled 'Viewing These Accounts' lists 'Amy User 2 Wang (amwang)' with a '[cancel]' link next to it.

ACCOUNT SETUP – ADDING USERS

- Log into your Adobe EchoSign account and go to the Account tab
- Under the section Users & Groups, go to Create New User
- Add the user's email address including first and last name
- Check the box 'View Their Agreements' if you want to view the activity of their agreements from your account
- Click 'Create User'
- An email will be sent to the email address entered. User will then activate their account.



The screenshot shows the 'Users & Groups' section of the Adobe EchoSign interface. On the left, a sidebar contains links for 'Personal Preferences', 'Signature Preferences', 'Account Sharing', 'Users & Groups', 'View All Users', 'Create New User' (highlighted), and 'View Groups'. The main content area is titled 'Create New User' and contains a form with fields for 'Email Address', 'First Name', 'Last Name', and 'User Group' (a dropdown menu currently showing 'Default Group'). There is an unchecked checkbox for 'View Their Agreements' with a help icon, and a green 'Create User' button at the bottom.

ACCOUNT VIEWING, USERS

View what documents are out for signature, what has been signed, when and by whom

ACCOUNT VIEWING, MANAGERS

Administrators can also go to the Manage tab to view document statuses for their team members. Select “Filter by Document Owner” and chose the agent whose contracts the Manager wishes to view. This assumes that account sharing has been setup ahead of time.

SUPPORTED FILE FORMATS

EchoSign supports the following file formats:

- PDF
- Microsoft Word (.doc and .docx)
- Microsoft Excel (.xls and .xlsx)
- Microsoft PowerPoint (.ppt and .pptx)
- WordPerfect (.wp)
- Text (.txt)
- Rich Text (.rtf)
- Graphics (.jpg, .jpeg, .gif, .tif, .tiff, .bmp and .png)
- Web (.htm or .html)

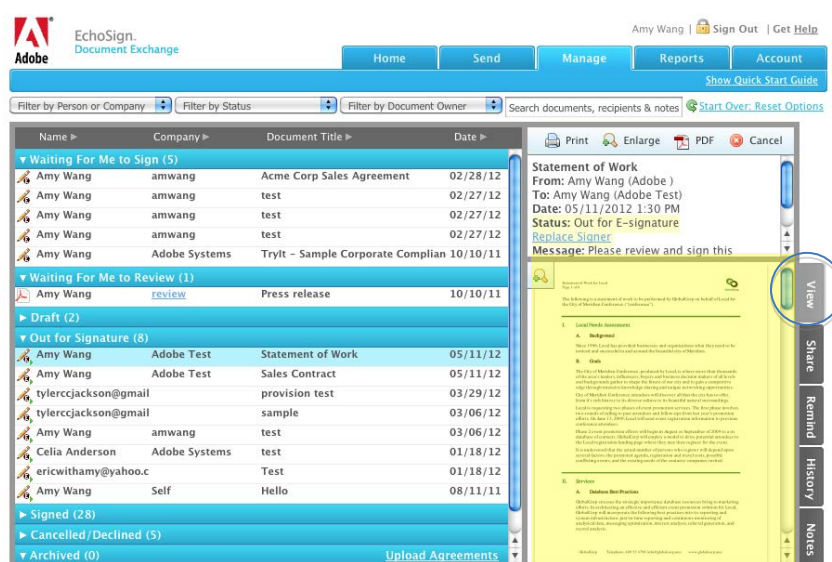
You can also upload files directly from your Google Docs, Dropbox, Box.net, or Evernote accounts.

TROUBLESHOOTING – SEND

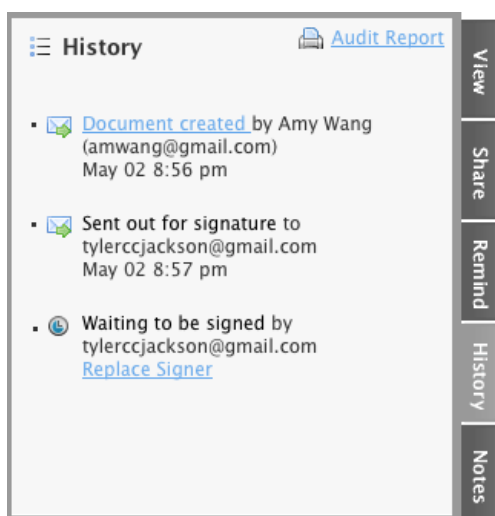
CONFIRMING THE DOCUMENT HAS BEEN SENT

EchoSign offers several ways to confirm that your document was sent for signature:

1. Check your email inbox for an email titled '[Document Name] has been sent out for E-signature'
2. On the Manage tab, highlight the document and check to see if a thumbnail of the document is visible.



3. Click the grey History tab and see if the document was sent



RECIPIENT HAS NOT RECEIVED THE DOCUMENT

1. Please have the recipient check their email spam filter to confirm the document was not flagged as spam. To avoid this issue going forward, have them add echosign@echosign.com to their email provider's white list or to their own email address book.
2. Go to the Manage tab and send a Reminder. This will resend the document to the recipient.

The screenshot shows the 'Create a Reminder' dialog box. It has a title bar with a yellow bell icon and the text 'Create a Reminder'. Below the title bar, there is a section 'Who do you want to Remind?' with a help icon. Under this section, there are two checkboxes: 'Myself' and 'Amy Wang'. Below this is a section 'Send the Reminder:' with three radio buttons: 'Right Now' (selected), 'Every Day' (with a dropdown arrow), and 'Specific Date' (with a date field showing 'Fri, May 11, 2012'). Below this is a section 'Add a Note:' with a text area and a small icon. At the bottom, there is a link 'Preview Reminder' and a button 'Set Reminder'. On the right side of the dialog, there is a vertical sidebar with buttons: 'View', 'Share', 'Remind' (highlighted), 'History', and 'Notes'.

START USING ADOBE ECHOSIGN

Start using Adobe EchoSign to experience it for yourself. Send an agreement now and see how Adobe EchoSign can transform the way you do business and get contracts signed.