ADOBE ECHOSIGN USER GUIDE

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ECHOSIGN OVERVIEW

SEND

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

SIGNATURE OPTIONS

☐ **I need to add my signature to this document**
Click on 'Change Order' to change the order of when you sign.

☐ **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.
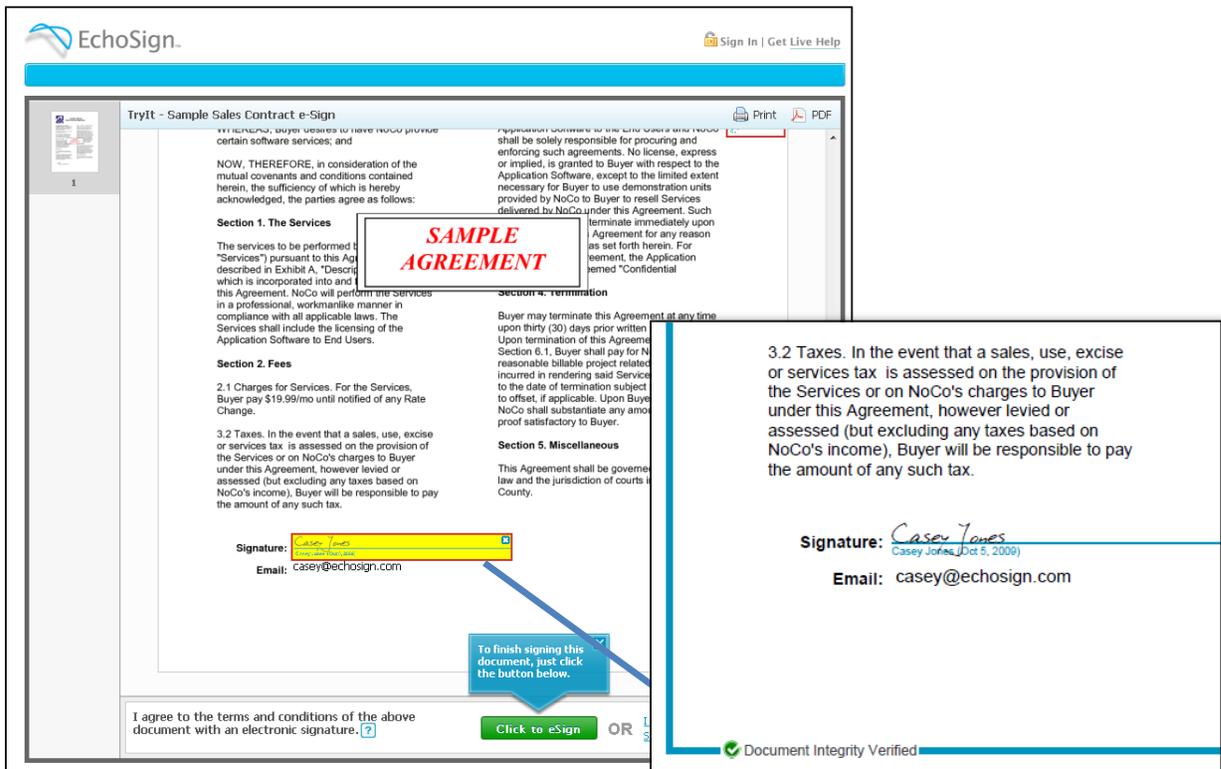
FAX SIGNATURES

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.

EchoSign.
Document Exchange

Send. Sign. Done.™

GLOBAL ELECTRONICS

CONDITIONS AND NON-DISCLOSURE AGREEMENT
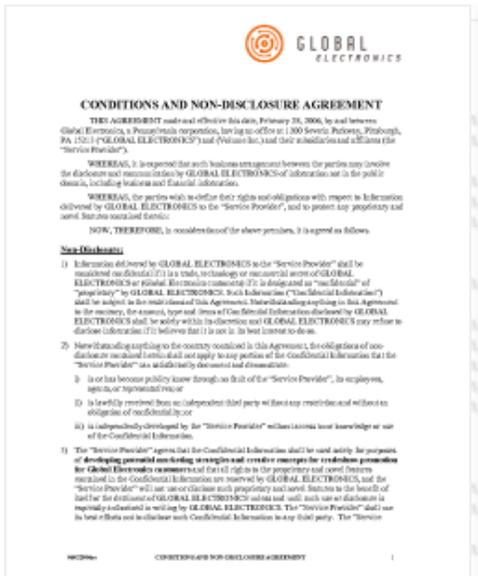
Amy Wang Has Sent You **NDA** to Sign.

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

EchoSign.

Secure Routing Code: 633075260445
Notice: EchoSign scanned documents are encrypted and unalterable.

Fax back using coversheet provided.

TRACK & MANAGE

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.

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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'
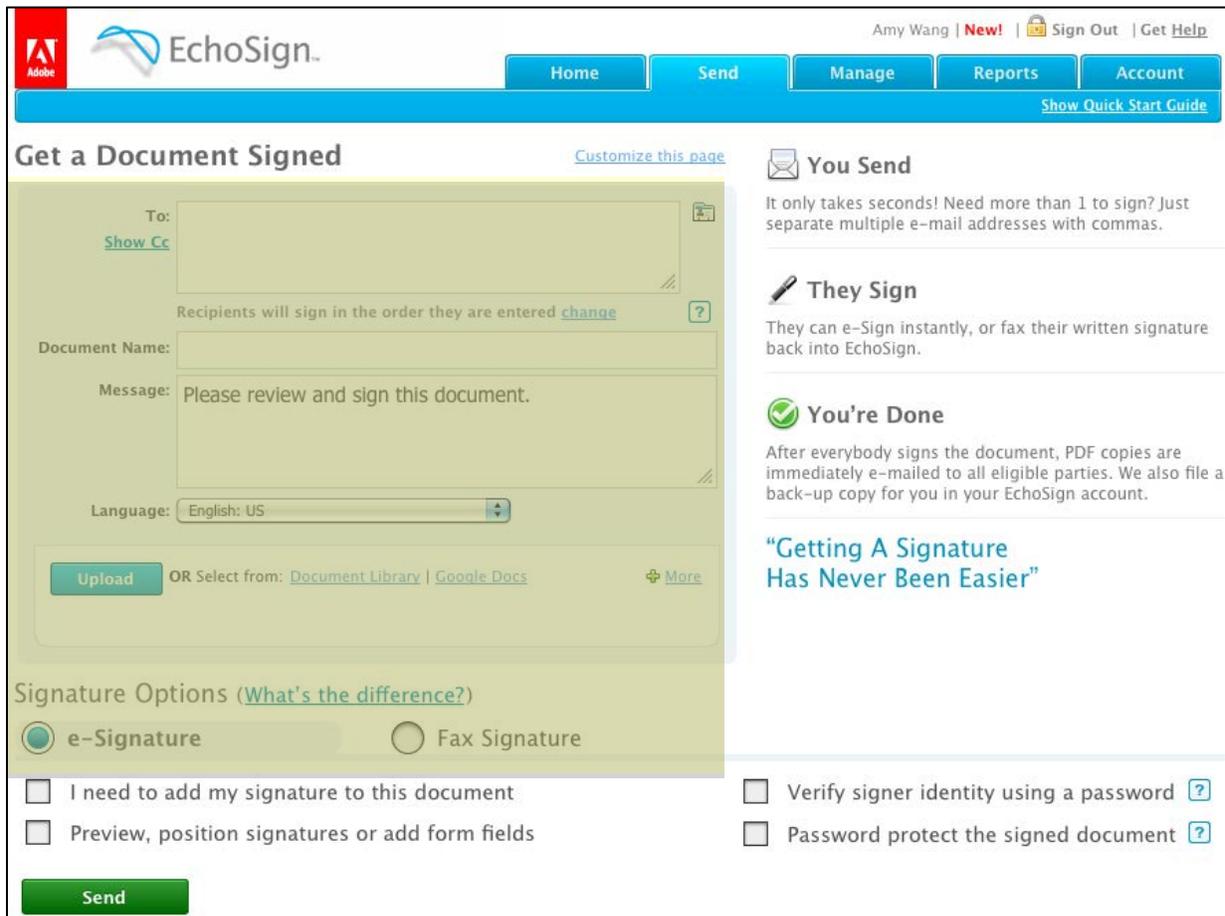
POSITION SIGNATURES, INITIALS, AND FORM FIELDS

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

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

SIGNED DOCUMENTS

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.

MANAGE DOCUMENTS

- 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

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

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.

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.
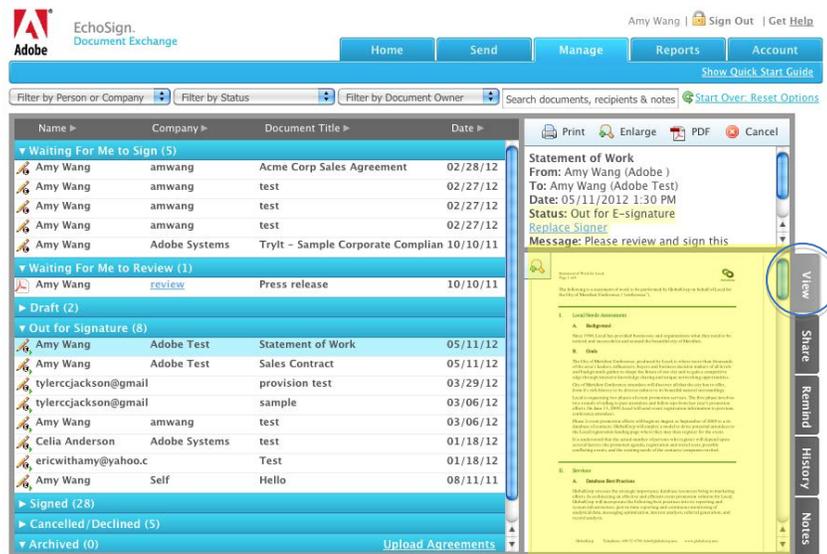
3. Click the grey History tab and see if the document was sent
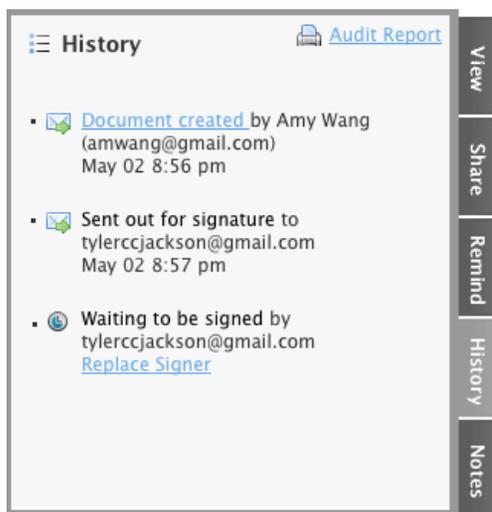
RECIPIENT HAS NOT RECEIVED THE DOCUMENT

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.
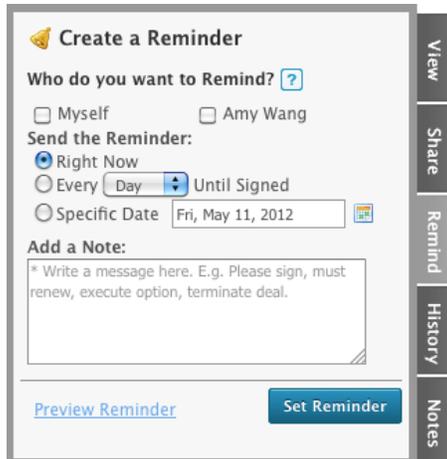
START USING ADOBE ECHOSIGN

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.