



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](#)

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

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

"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.

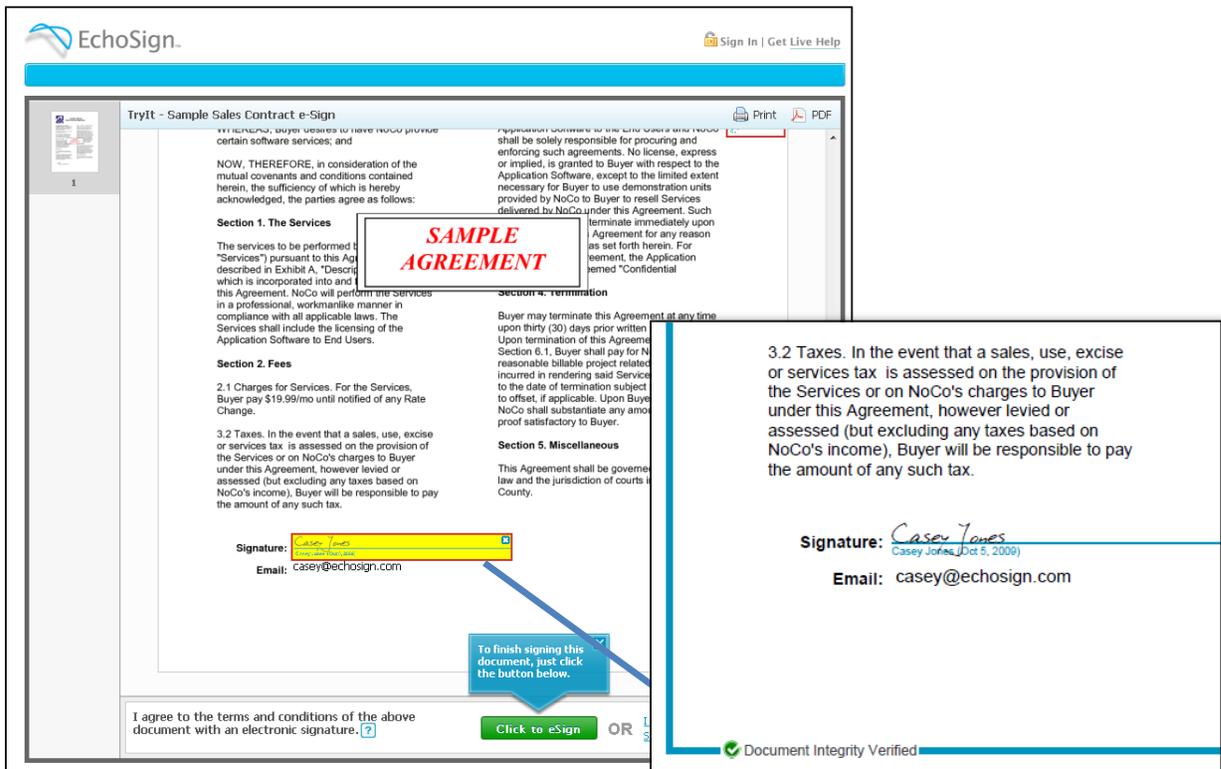
SIGN

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

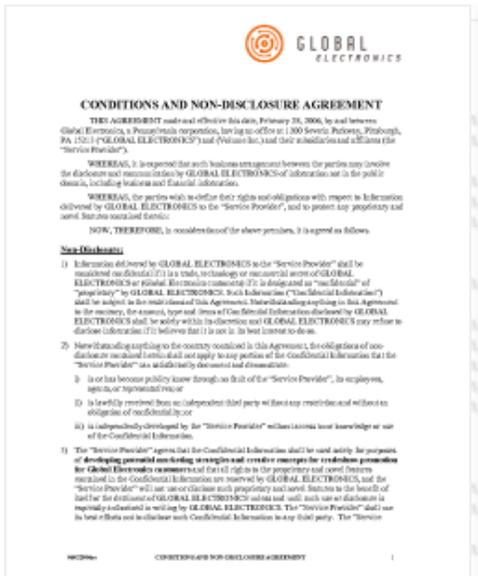
To: Amy Wang

NDA.pdf (702 KB) Preview

Print and sign the attached PDF document.



Send. Sign. Done.™

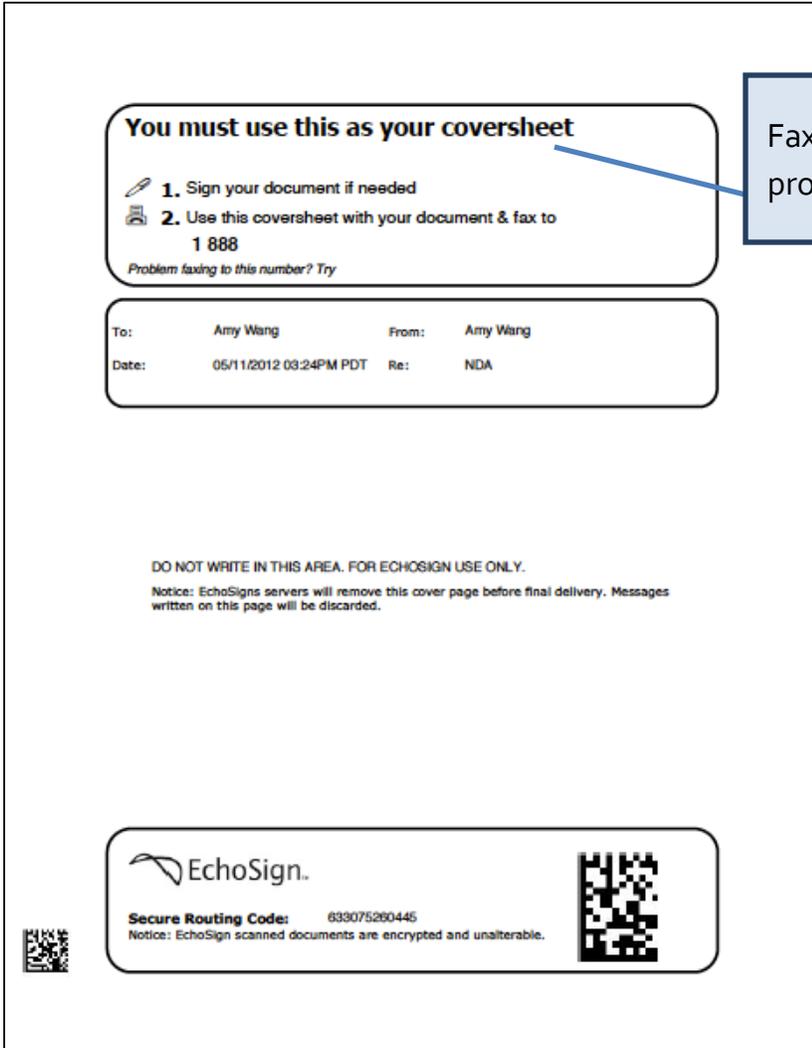


Amy Wang Has Sent You NDA to Sign.

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](#)



Fax back using coversheet provided.

TRACK & MANAGE

The screenshot shows the Adobe EchoSign interface. At the top, there are navigation tabs: Home, Send, Manage, Reports, and Account. Below these are filter options: Filter by Person or Company, Filter by Status, and Filter by Document Owner. A search bar is also present. The main area displays a list of documents with columns for Name, Company, Document Title, and Date. The documents are categorized into: 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). An 'Upload Agreements' button is at the bottom of the list. On the right, a preview window is open for a document titled 'Statement of Work'. The preview shows the document content and a sidebar with actions: View, Share, Remind, History, and Notes. The document content includes a header with 'From: Amy Wang (Adobe)', 'To: Amy Wang (Adobe Test)', 'Date: 05/11/2012 1:30 PM', and 'Status: Out for E-signature'. The main body of the document contains sections for 'Local Needs Assessments' and 'Database Best Practices'.

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

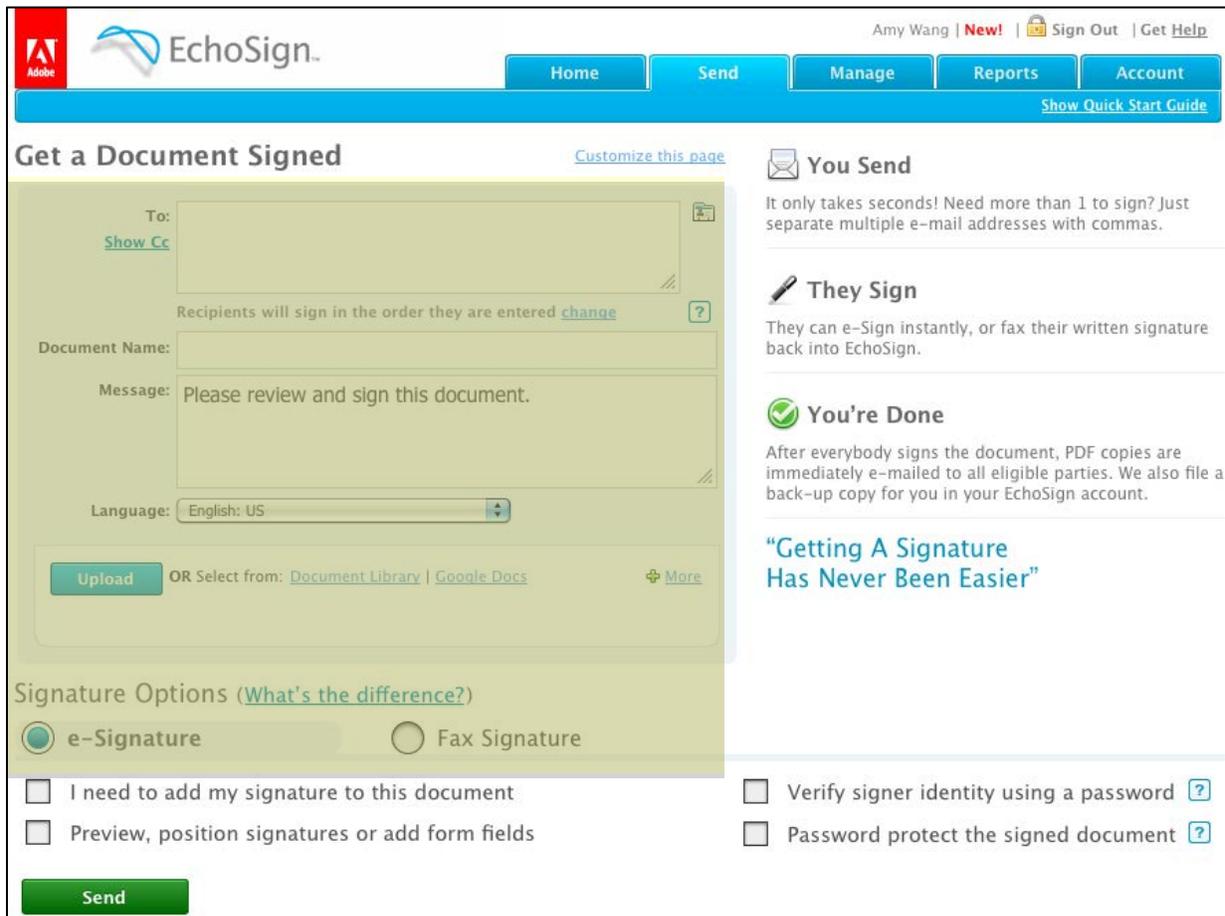
- To sign up for a free account, go to: <http://www.echosign.com/public/register>
- To learn more about Adobe EchoSign pricing plans and how to sign up for a free trial of an Team, Enterprise, or Global account, go to: http://www.echosign.com/public/static/cost.jsp?cs=mktg_topnav
- After you complete 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'



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 interface for sending a document. The top navigation bar includes 'Home', 'Send', 'Manage', 'Reports', and 'Account'. The main content area is titled 'Get a Document Signed' and contains a form with the following fields: 'To' (with a 'Show Cc' link), 'Document Name', 'Message' (with the text 'Please review and sign this document.'), and 'Language' (set to 'English: US'). There are 'Upload' and 'Send' buttons, and a 'More' link. On the right side, there are three informational sections: 'You Send' (explaining that it takes seconds and multiple addresses can be separated by commas), 'They Sign' (explaining that recipients can e-sign or fax back), and 'You're Done' (explaining that PDF copies are emailed to all parties). Below the form, there are 'Signature Options' with radio buttons for 'e-Signature' (selected) and 'Fax Signature'. There are also four 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 left.

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

The screenshot shows a document form with a signature section and a certification section. The signature section has fields for 'Signature', 'Initials', 'Title', 'Company', 'Name', 'Email', 'Date Signed', 'Form Field', and 'Checkbox'. The certification section is titled 'Part II Certification' and contains text about certification instructions and a signature line with a 'Sign Here' label and a 'Date Signed' field. The signature line has a red box around the 'Signature' field and a 'Date Signed' field.

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

The screenshot displays the Adobe EchoSign web interface. At the top, the user is logged in as 'Amy Wang' with options for 'Sign Out' and 'Get Help'. The main navigation bar includes 'Home', 'Send', 'Manage', 'Reports', and 'Account'. Below this, there are filter options for 'Person or Company', 'Status', and 'Document Owner', along with a search box and a 'Start Over: Reset Options' link.

The central part of the interface is a document list table with columns for Name, Company, Document Title, and Date. The list is categorized into several status groups:

- Waiting For Me to Sign (5):** Includes documents like 'Acme Corp Sales Agreement' and several 'test' documents.
- Waiting For Me to Review (1):** Includes a 'Press release' document.
- Draft (2)**
- Out for Signature (8):** Includes documents like 'Statement of Work', 'Sales Contract', and 'provision test'.
- Signed (28)**
- Cancelled/Declined (5)**
- Archived (0)**

On the right side, a document preview is shown for a 'Statement of Work' document. The preview includes the sender's information (Amy Wang), the recipient's information (Amy Wang), the date (05/11/2012 1:30 PM), and the status 'Out for E-signature'. A 'Replace Signer' link is visible. Below the header, the document content is displayed, starting with a 'Background' section that discusses the City of Mendocino and its goals for economic development.

At the bottom of the preview window, there are buttons for 'Print', 'Enlarge', 'PDF', and 'Cancel'. On the far right, a vertical sidebar contains buttons for 'View', 'Share', 'Remind', 'History', and 'Notes'.

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 user interface. On the left, a sidebar menu includes 'Personal Preferences', 'Signature Preferences', 'Account Sharing', and 'Users & Groups'. Under 'Account Sharing', the options are 'View Other Accounts' (highlighted in blue) and 'Share My Account'. The main content area is titled 'Request To View an Account' and features a yellow background. It contains an 'Email Addresses:' input field, a green 'Request' button, and a section titled 'Viewing These Accounts' which lists 'Amy User 2 Wang (amwang) [cancel]'.

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 'Create New User' form in the Adobe EchoSign user interface. The left sidebar menu is similar to the previous screenshot, but 'Users & Groups' is expanded, showing 'View All Users', 'Create New User' (highlighted in blue), and 'View Groups'. The main content area is titled 'Create New User' and has a yellow background. It includes input fields for 'Email Address', 'First Name', and 'Last Name', a 'User Group' dropdown menu set to 'Default Group', a checkbox for 'View Their Agreements', and a green 'Create User' button.

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)

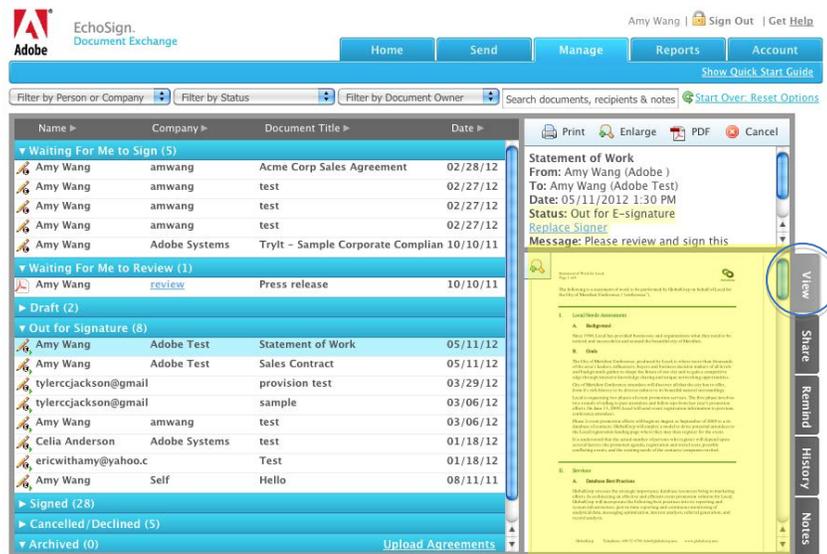
You can also upload files directly from your Google Docs, Dropbox, Box.net, or Evernote accounts.

TROUBLESHOOTING – SEND

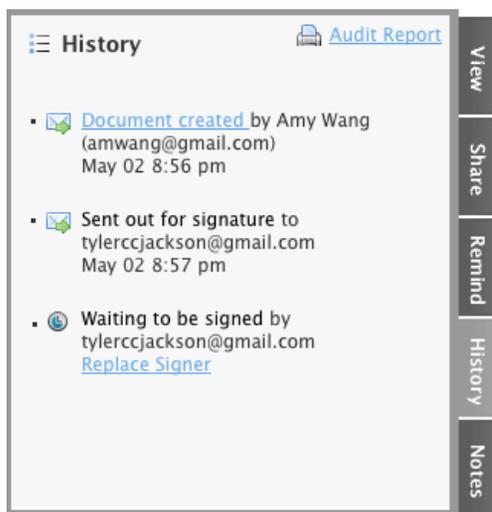
CONFIRMING THE DOCUMENT HAS BEEN SENT

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.

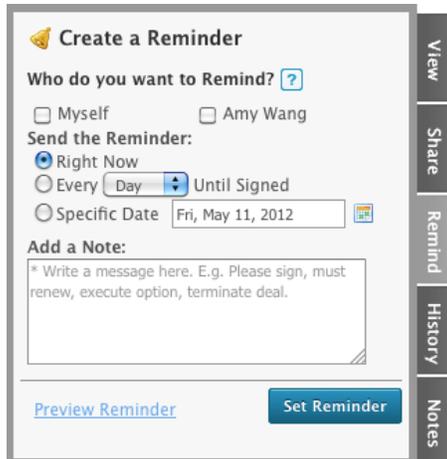


3. Click the grey History tab and see if the document was sent



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 a 'Create a Reminder' dialog box with a vertical sidebar on the right containing buttons for 'View', 'Share', 'Remind', 'History', and 'Notes'. The main area contains the following fields:

- Who do you want to Remind?** with a help icon. Options: Myself, Amy Wang.
- Send the Reminder:** with three radio buttons: Right Now, Every (with a dropdown arrow), and Specific Date (with a calendar icon).
- Add a Note:** with a text area containing the placeholder text: '* Write a message here. E.g. Please sign, must renew, execute option, terminate deal.'
- Buttons at the bottom: [Preview Reminder](#) and **Set Reminder**.

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.