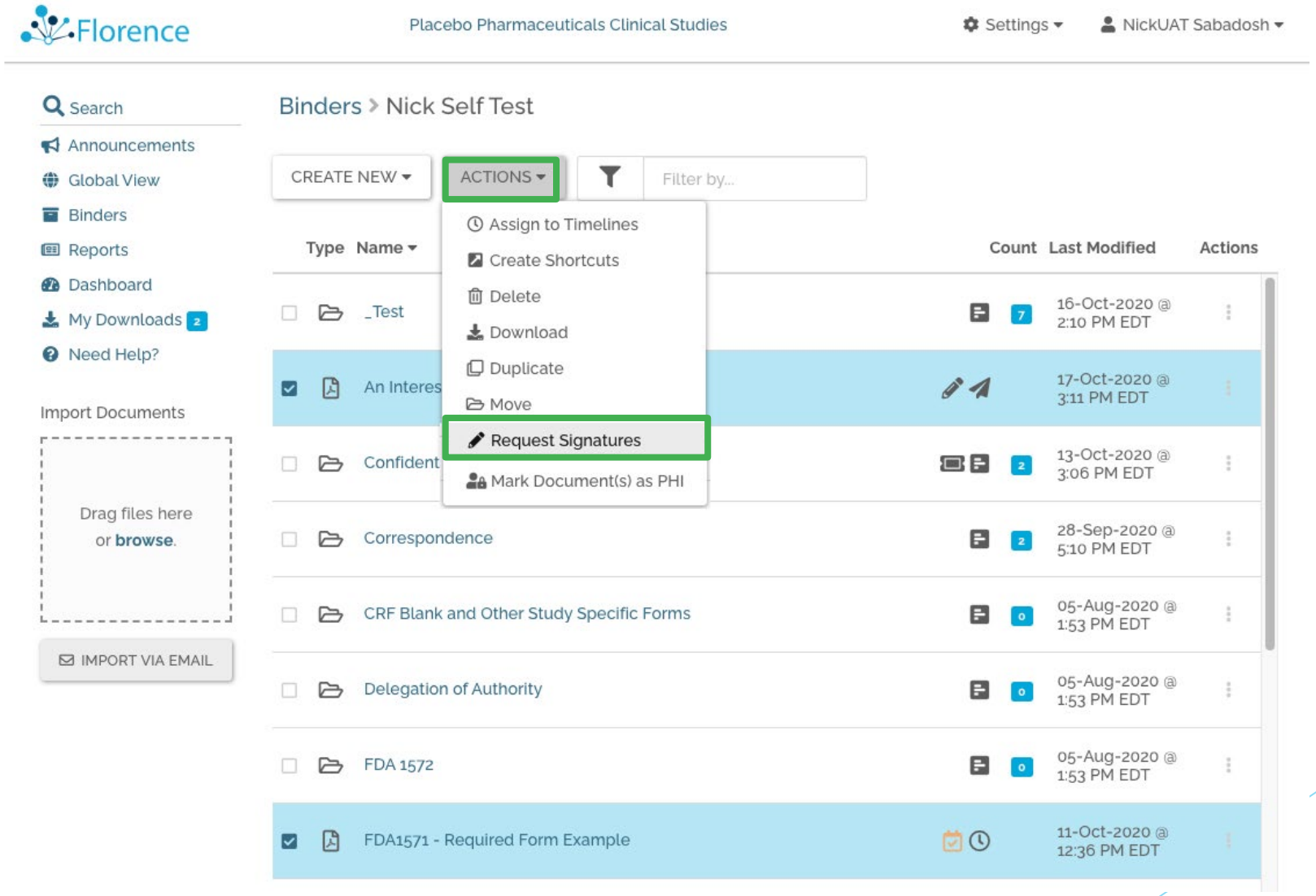
Request Signatures

QUICK TIPS

You can request signatures on one document or multiple documents.



How?

1. Select document(s) to be singed
2. Select *Requests Signature* from ACTIONS drop down

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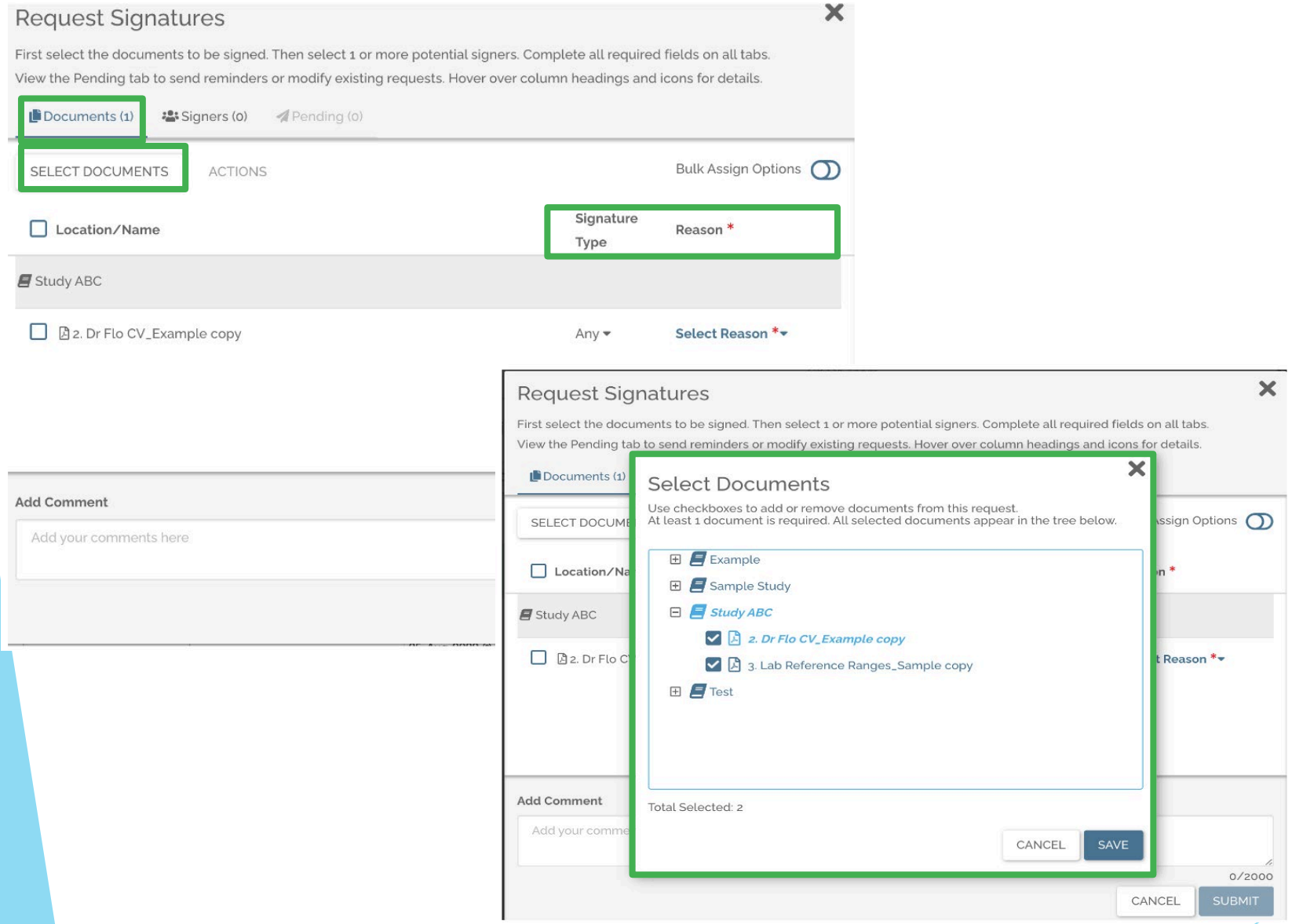
Signature - Selecting Documents



How?

1. To request a signature on a document(s), click *Select Documents* on the documents tab
2. When the *Select Documents* pop up window opens, select the additional documents from the Binders/Folders you have permission to view and click *Save*
3. Select the Signature Type and Reason for each document

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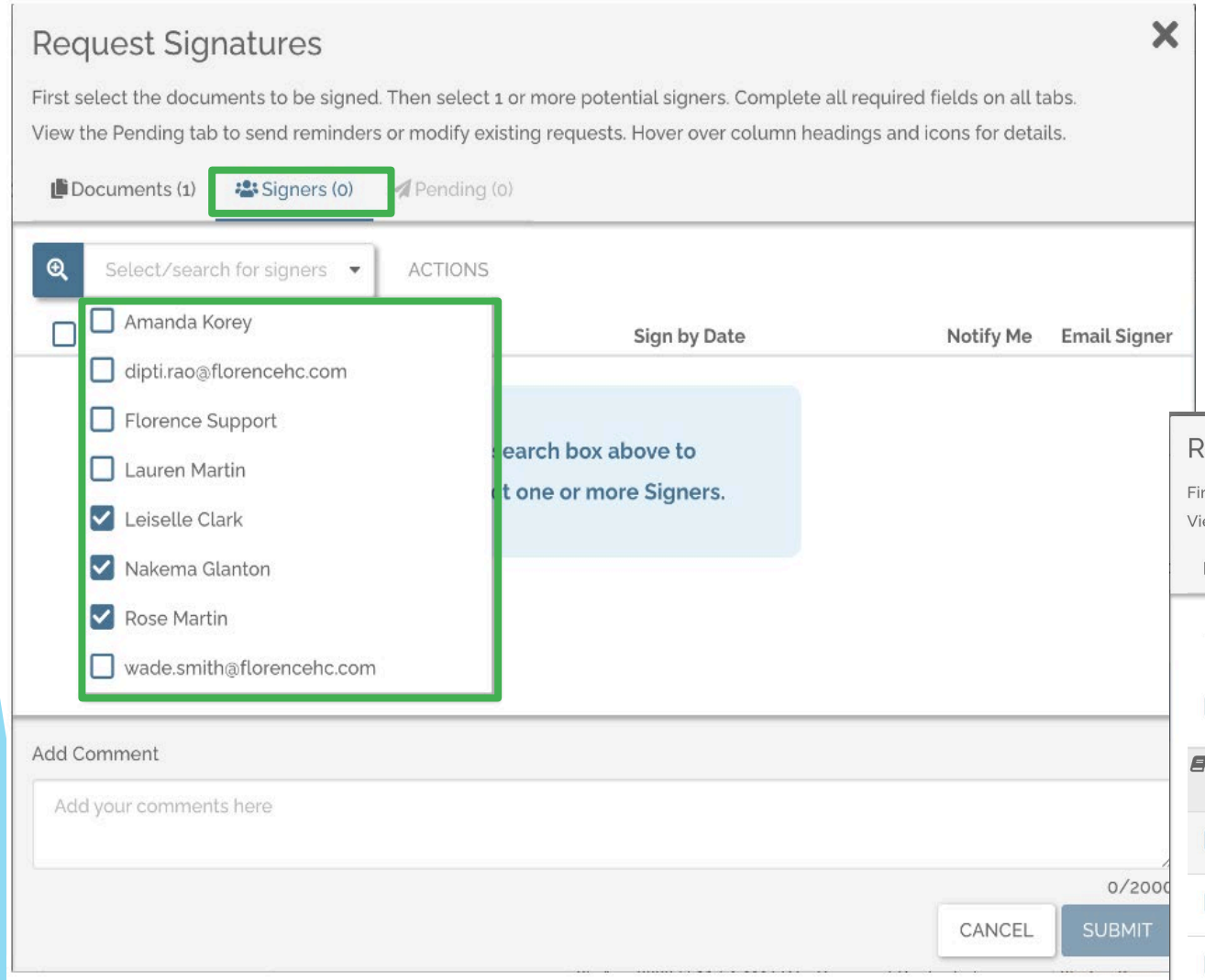
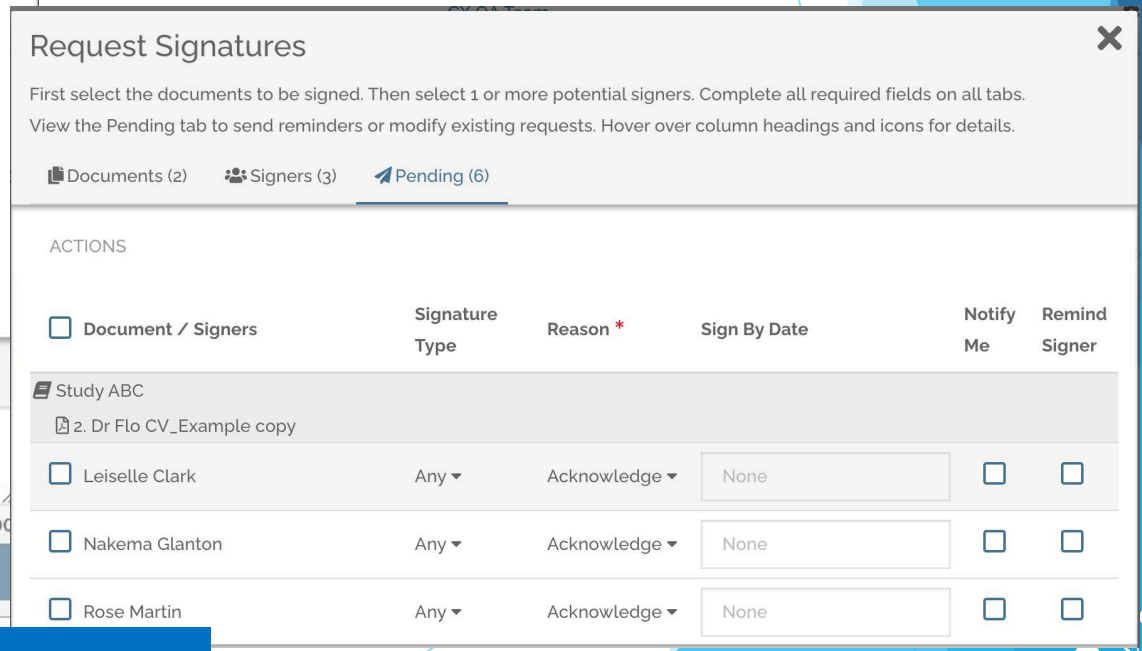
Signature - Selecting Signers



- From the *Signers* tab, select the user(s) you would like to request a signature(s) from



Remember: The list of signers will only display users who have signing permissions for one or more of the selected documents.

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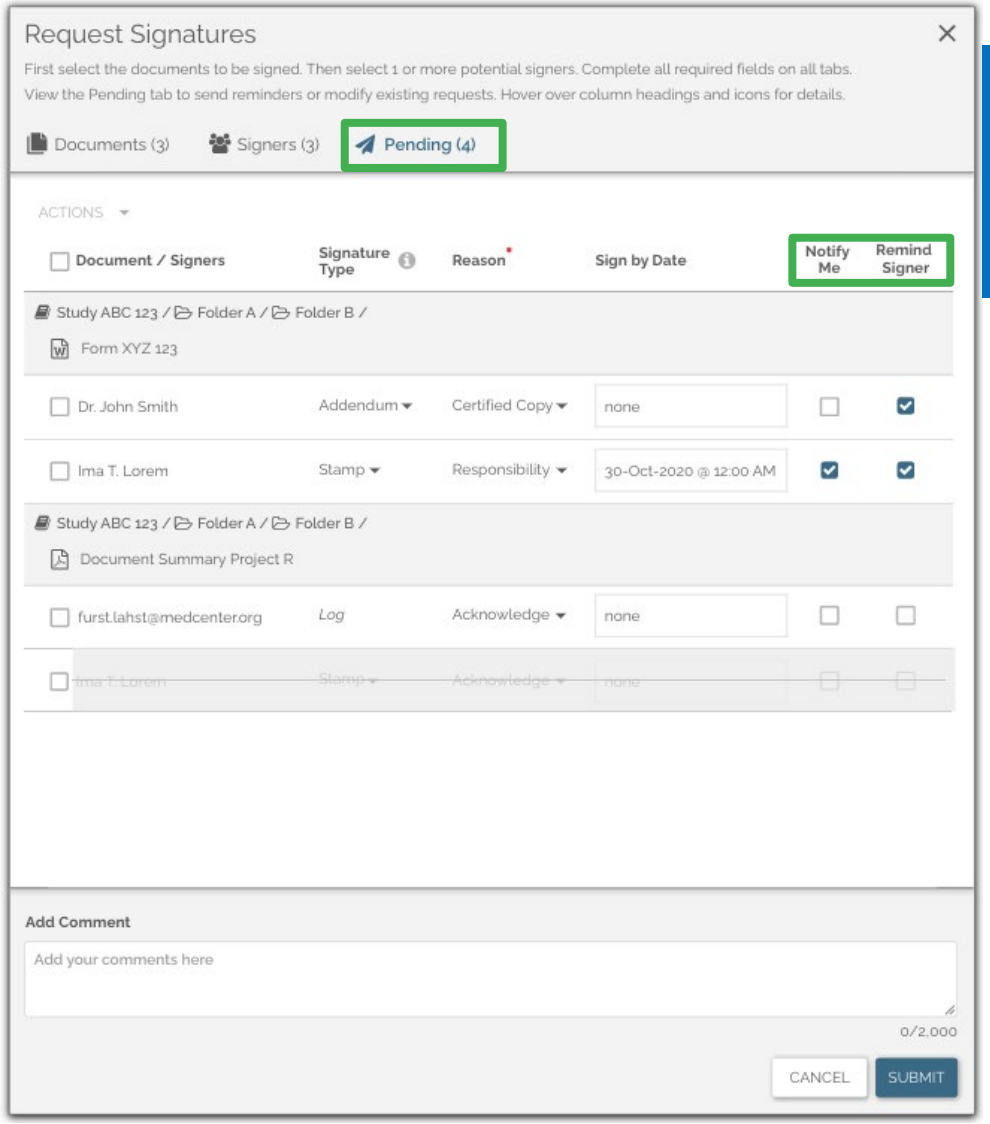
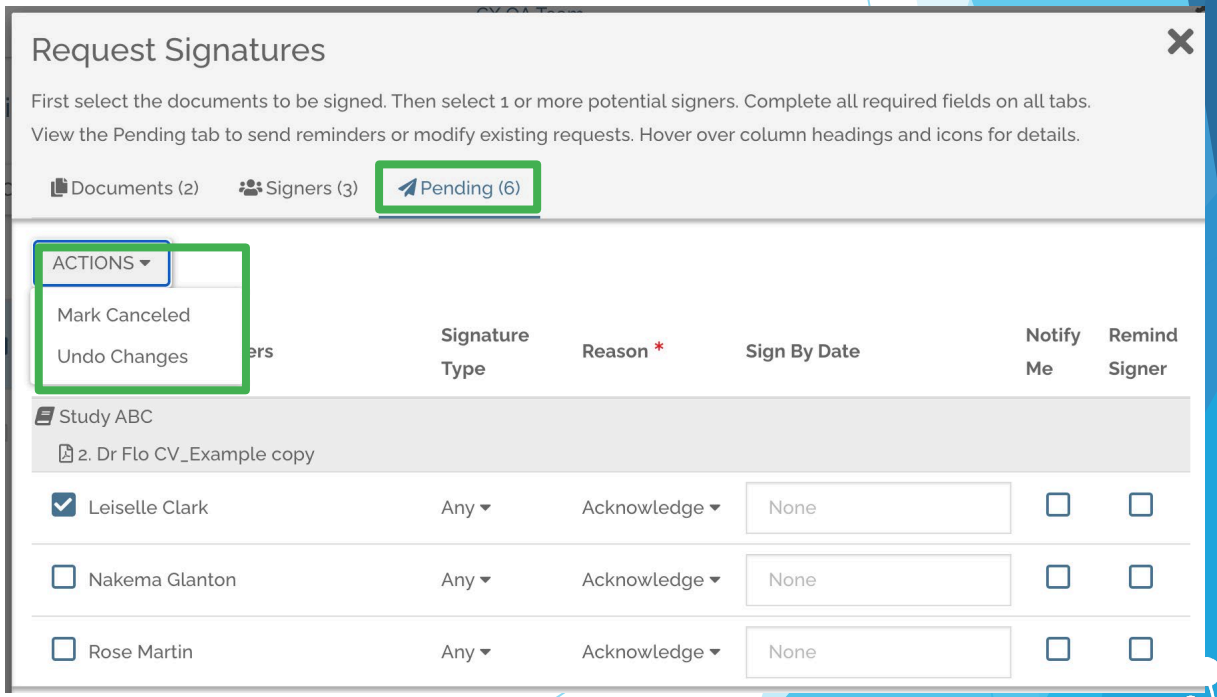
Signature Request - Pending



View the *Pending* tab to send reminders or modify existing signature requests.



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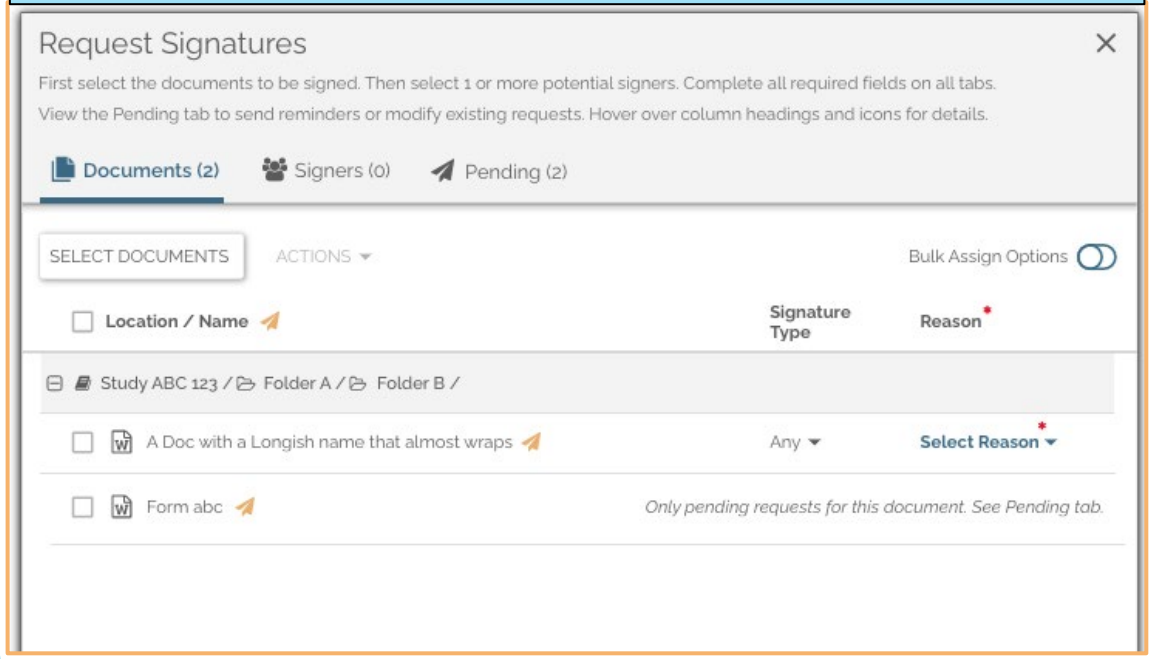
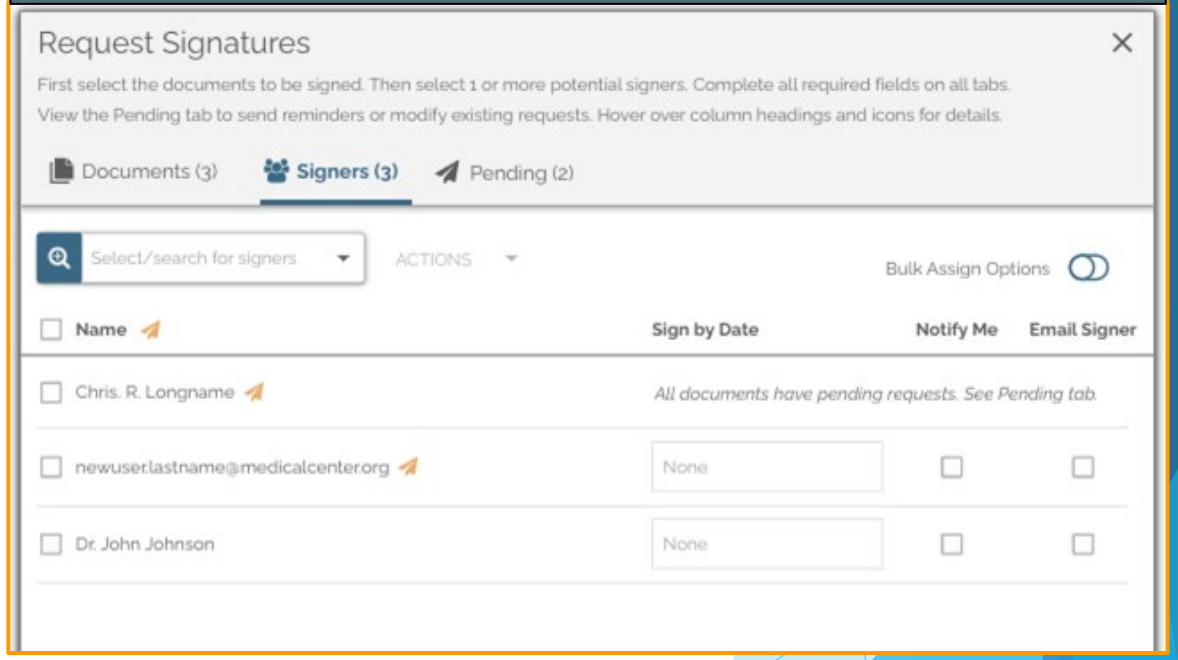
Signature Request - Pending

Documents Tab



Signers Tab



The airplane icon indicates a *Pending Signature* request already exists on document

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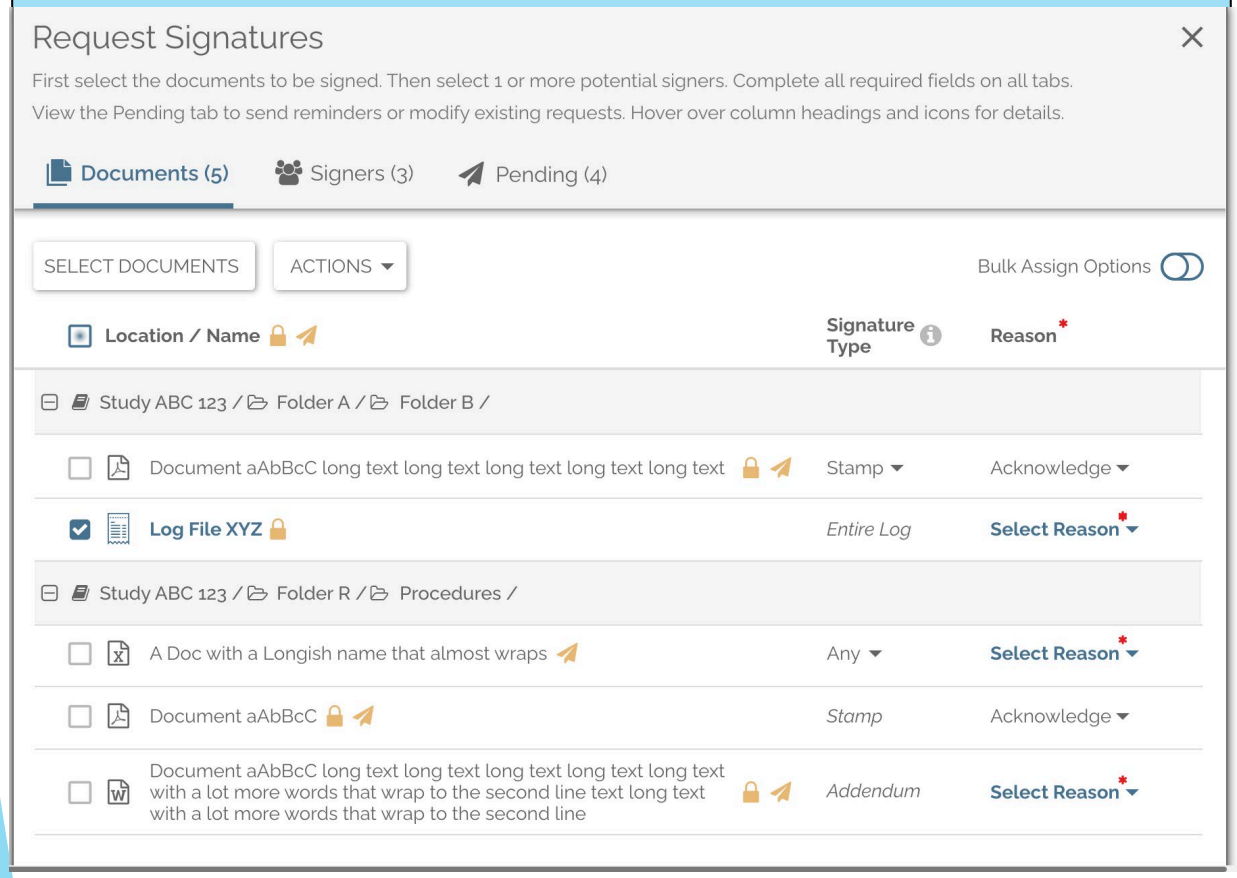
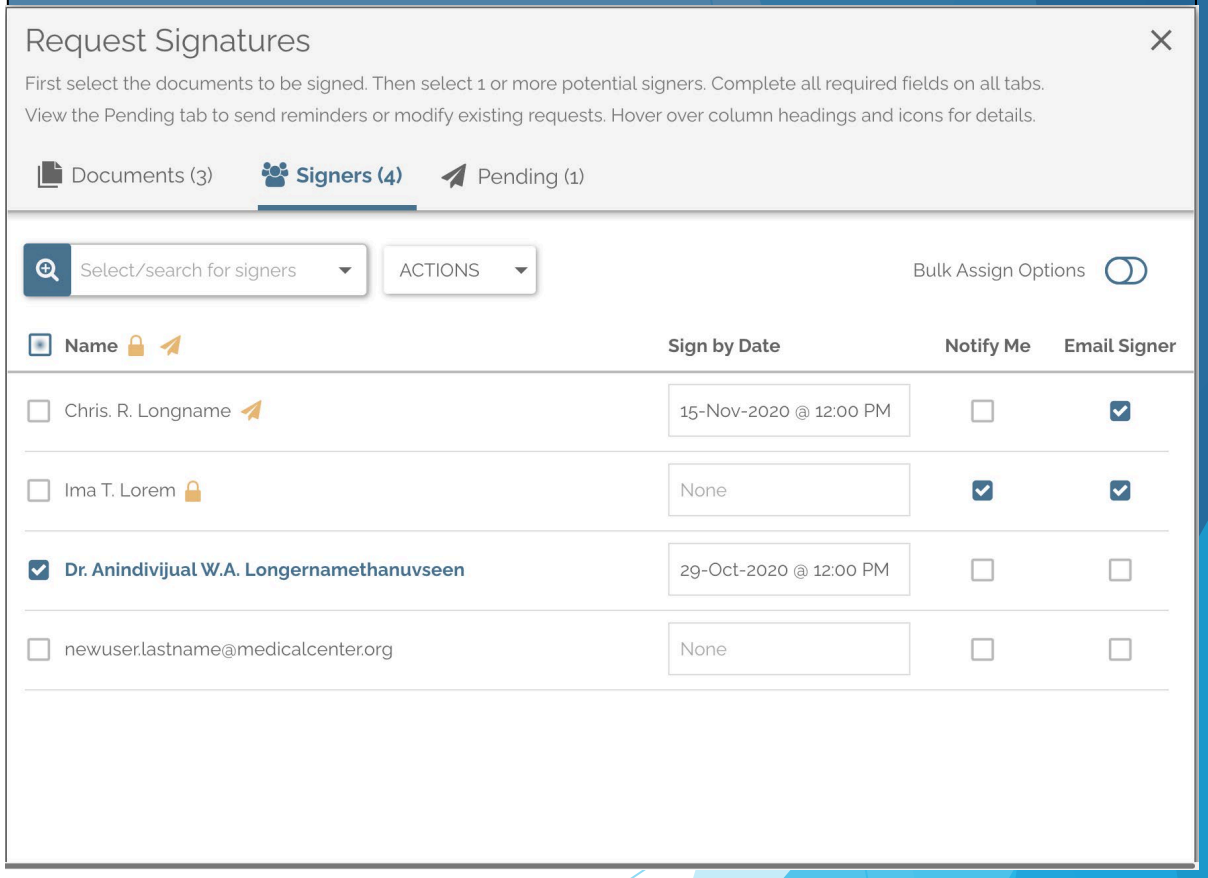
Signature Request - Permissions

Documents Tab



Signers Tab



The lock icon indicates the user does not have the necessary permissions to sign one of the requested documents

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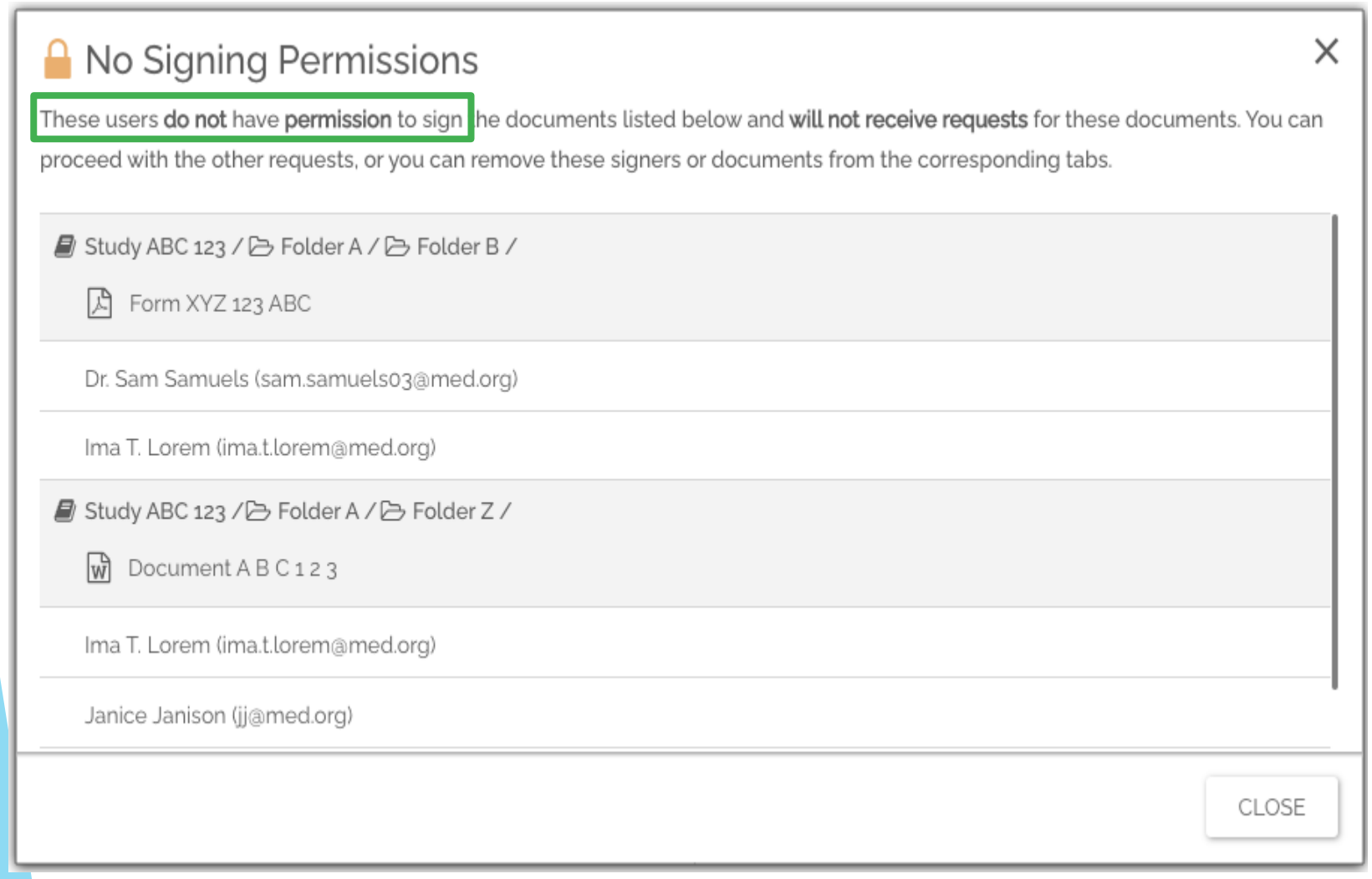
Signature Request - Permissions



Some signers lack signing permission for certain documents. Click on *View details* to see which signers do not have signing permissions and on which document(s)

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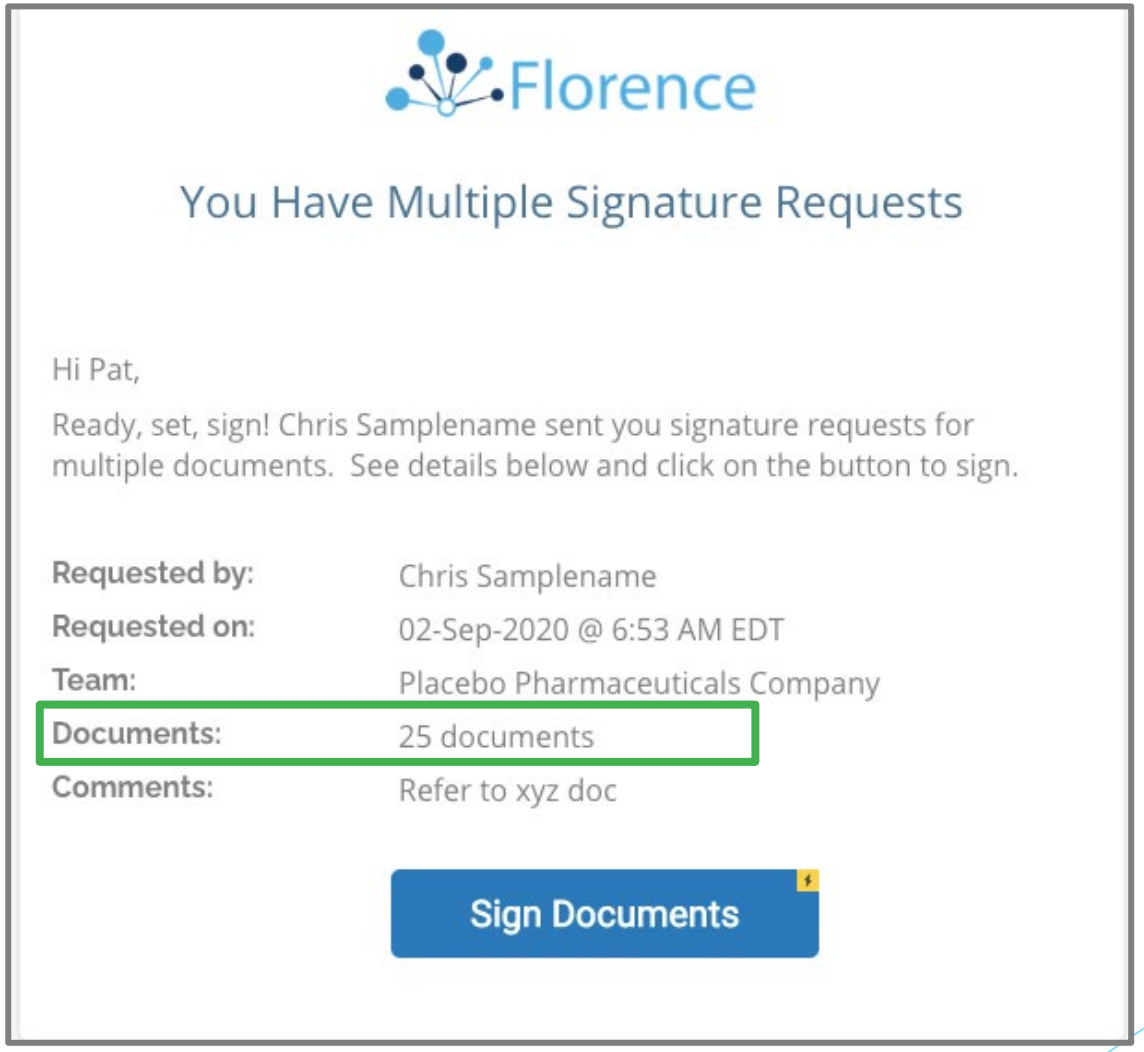
Bulk Signature Request - Email



You will receive one email for all bulk signature requests

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