

HELP USER GUIDE

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Video Signing

Video Signing allows you to have an all-in-one solution for digital signing and video communication (Audio and Video) in one platform. This allows you to sign any document based on the legal requirements of your country.

Video signing supports from 1 up to 50 participants.

Video Signing has the following Browser Support, please use the latest version in each browser:

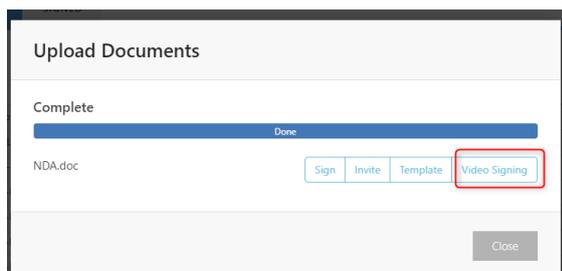
	Chrome	Firefox	Safari	Edge
Android	✓	✓		
iOS			✓	
macOS	✓	✓	✓	
Windows	✓	✓	✓	✓(ver 81+)

You can also invite guests who don't need to sign, that support the signer in the video meeting.

The person who sets up the video signing can Host the session themselves or invite anyone else to host the video signing meeting. The host can also be invited to sign the document, or host without signing.

Video signing is an additional cost, on top of the documents and users plan.

You can start video signing from the upload popup



Video signing cannot be used with Video Confirmation, Face to Face signing, or Review before signing.

Video Signing can be used with ID Check for NZ accounts, and with the Effective date function.

Video Signing technology is using WEB RTC and browser Screen Sharing, desktop is the best platform for screen sharing however mobile devices use sync technology to share other signees' actions on mobile screen.

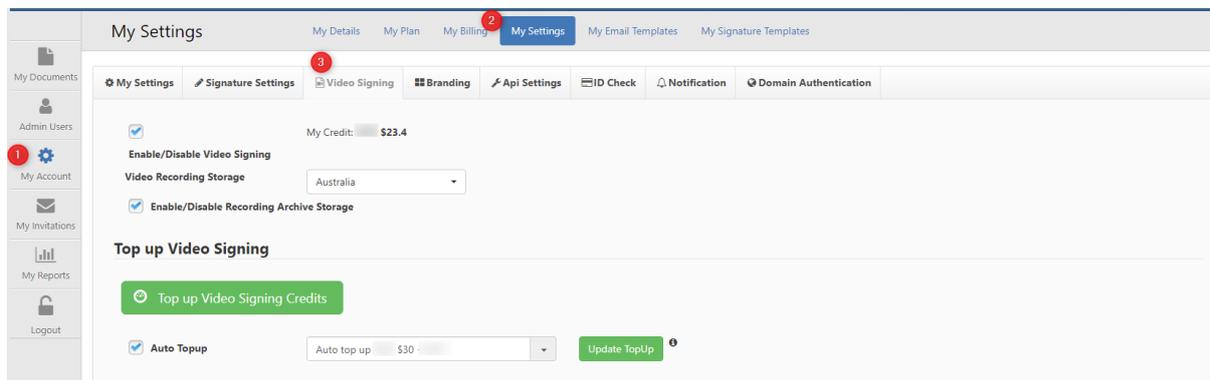
Please note:

- To host and manage a Video signing meeting the host must use desktop or laptop.
- For best screen sharing use desktop or laptop, in mobile device we are using screen sync, means mobile device user can share his signing results with other participants

Set Up

To enable Video Signing your account must be a Secured Signing paid account, if you didn't buy Video signing credit already, you'll get 5.00 credits to try one video signing session at no cost for you.

To enable Video Signing, login to your Secured Signing account -> My Account -> My Setting -> Video Signing



Video recording storage location – select the preferred region to keep the recording for long term archiving, you can select Australia, USA, or the UK

Enable/Disable Recording Archive Storage - We recommend enabling recording archive storage so you can access the recording of signing from the document whenever you need it. Storage has a monthly or annual cost.

Buy Video Signing Credit – Buy the required amount of video signing credits.

Auto Top up - Make sure you always have enough credits to use video signing, with auto top up.

We Sign process

We Sign, invite other people to sign online, remotely, with video signing (audio-visual communication), once Video Signing is enabled any We Sign process can use Video Signing as well.

Once Video Signing is ticked, schedule the date and time for the Video Signing Meeting. An ICS file will be attached to the email invitation in order to add the meeting to outlook or Google calendars.

Invite the host for a Video Signing Meeting.

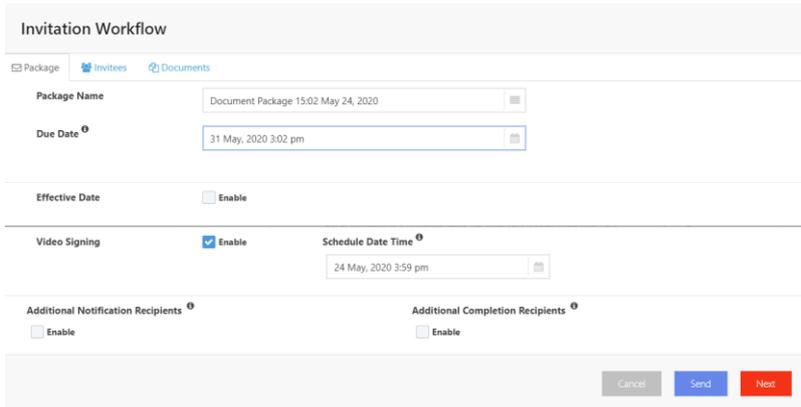
You can reschedule the Video Signing Meeting from the email invitation and notify all signers invitees about new date and time for the meeting.

In case the signing process needs a signing order please select Sequential in the signing order section and organise your invitees in the required order. The signing order will be used in the Video Signing meeting.

Use of form fields is supported in We Sign Video Signing processes. Invitee 1 can fill-in form fields and all participants can see the date the first invitee filled those fields.

We sign Package

Video Signing also supports We Sign Packages Email and setting up the date and time for the session.



Invitation Workflow

Package Name: Document Package 15:02 May 24, 2020

Due Date: 31 May, 2020 3:02 pm

Effective Date: Enable

Video Signing: Enable Schedule Date Time: 24 May, 2020 3:59 pm

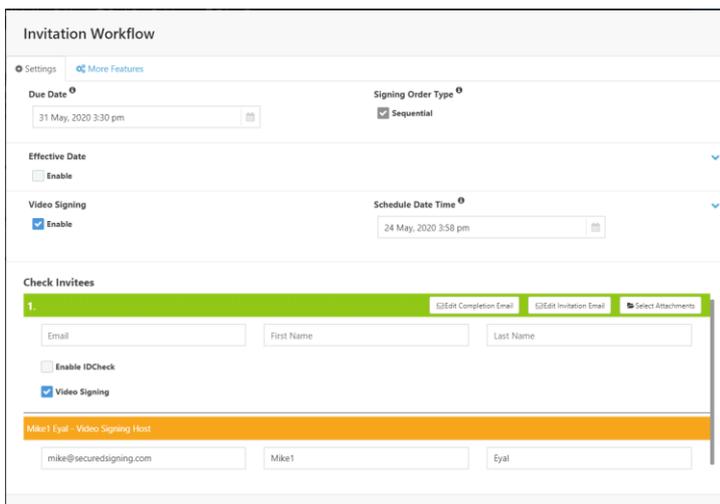
Additional Notification Recipients: Enable Additional Completion Recipients: Enable

Buttons: Cancel, Send, Next

Form Filler Template

Video Signing supports Fill-in for reusable templates.

Select the form you want to send out from the template tab and press send.



Invitation Workflow

Settings: More Features

Due Date: 31 May, 2020 3:30 pm Signing Order Type: Sequential

Effective Date: Enable

Video Signing: Enable Schedule Date Time: 24 May, 2020 3:58 pm

Check Invitees

1.

Enable IDCheck Video Signing

Mike1 Eyal - Video Signing Host

Form filler Template Package

Select multiple templates from templates tab and press send.

Setup the date and time for the video signing session.

In next step you can remove invitees from the Video Signing process.

The screenshot shows the 'Invitation Workflow' form. It includes fields for 'Package Name' (Document Package 15:34 May 24, 2020), 'Due Date' (31 May, 2020 3:34 pm), 'Effective Date' (with an 'Enable' checkbox), 'Video Signing' (checked 'Enable'), and 'Schedule Date Time' (24 May, 2020 3:59 pm). There are also sections for 'Additional Notification Recipients' and 'Additional Completion Recipients', both with 'Enable' checkboxes. At the bottom, there are 'Cancel', 'Send', and 'New' buttons.

Additional Video Signing Guests

You can add guests to a Video signing session to support you in the meeting, without needing to sign. The Document Owner/Sender can add as many guests as required during the meeting setup process.

Each guest will be able to take part in the video signing meeting, watch and talk during the meeting, but won't be asked to sign.

Guests are available in the WeSign and Form Filler/template processes, for one, or a package of documents.

This screenshot shows the 'Invitation Workflow' form with the 'Settings' tab selected. The 'Additional Video Signing Guests' section is highlighted with a red arrow pointing to a 'View/Manage' button. Other sections include 'Additional Notification Recipients' and 'Additional Completion Recipients', both with 'Enable' checkboxes. At the bottom, there are 'Cancel', 'Previous', and 'Send' buttons.

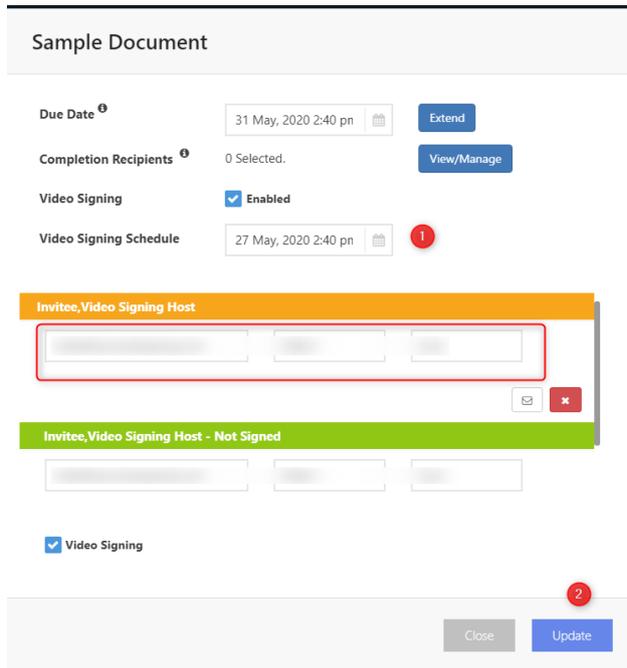
The 'Video Guests' form contains input fields for an email address (info@securedsigning.co.nz), a name (Greg), and a surname (Wood). There is a checkbox for 'Enable SMS Authentication'. At the bottom, there are 'Ok' and 'Add' buttons, with a red arrow pointing to the 'Add' button.

Additional Video Signing Guests add to Video Signing cost as a participant in the meeting. Pricing is based on the Video Signing page in your secured signing account -> My Settings -> Video Signing

In Progress – Video Signing control and visibility

Check the document signing status at any time from the In Progress Tab.

Click on the “i” icon to check the signing process status or change invitee details.



The screenshot shows the 'Sample Document' interface. At the top, there's a header 'Sample Document'. Below it, there are several settings: 'Due Date' set to '31 May, 2020 2:40 pm' with an 'Extend' button; 'Completion Recipients' set to '0 Selected.' with a 'View/Manage' button; 'Video Signing' set to 'Enabled' with a checked checkbox; and 'Video Signing Schedule' set to '27 May, 2020 2:40 pm' with a calendar icon and a red 'i' icon. Below these settings are two lists of invitees. The first list is titled 'Invitee, Video Signing Host' and has a red box around it. The second list is titled 'Invitee, Video Signing Host - Not Signed'. At the bottom, there's a 'Close' button and an 'Update' button with a red '2' icon above it.

To reschedule a Video signing meeting just change the date and time and press update.

You can turn off Video signing for all or individual signers/invitees.

Removing the host will disable the Video Signing process for everyone.

Witness Video Signing

Video Signing supports the witnessing process. Invitee's can invite a witness to a signing process over Video Signing, any invitee can invite any number of witness' for video signing.

The invitee will receive an email to invite the witness and setup a date and time for video meeting, click on the email's link to invite the witness and setup a time. Witness and invitee will get an email to join the video signing meeting.

In the Video Signing meeting, the invitee will sign first and then the witness will sign.

Invitee is the Video Signing meeting host

The screenshot shows the 'Invitation Workflow' form. The 'Effective Date' section has 'Enable' checked. The 'Video Signing with Witness' section has 'Enable' checked. The 'Check Invitees' section shows a table with columns for 'Stu', 'Wood', 'Completion Email', 'Invitation Email', and 'Attachments'. Below the table, 'Video Signing With Witness' is selected, and 'Invitee as Host' is also selected. Buttons for 'Cancel', 'Send', and 'Next' are at the bottom.

The sender, invitee, or any other person that is nominated by the sender can host the Video Signing meeting.

Host, invitee, and witness will all receive email invitations to join the Video Signing Meeting, it is best practice for the host and invitees to agree on a date and time for the video signing meeting beforehand.

Witness Details

You require a witness for your signature.
Please fill in the details below and click Ok

The 'Witness Details' form includes input fields for 'Email', 'First name', and 'Last name'. Below these is a 'Schedule Date' field with a calendar icon. A green 'SEND FOR VIDEO SIGNING' button is at the bottom right.

Nominate host for Video Signing Meeting

This screenshot is similar to the first one but shows the 'Check Invitees' section with 'Nominated Host' selected. An orange banner at the bottom of the table area says 'Video Signing Host with Witness'.

The Sender can nominate someone else to host the video signing, they will then receive the host email instead of the sender and run the video signing session.

Witness Details

You require a witness for your signature.

Please fill in the details below and click Ok

Witness1:

Email

First name

Last name

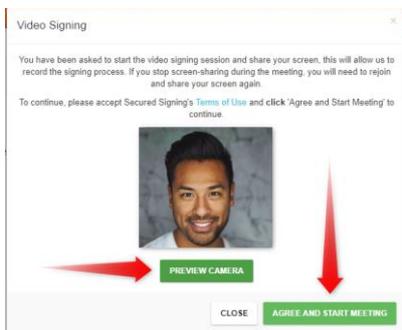
Schedule Date

SEND FOR VIDEO SIGNING

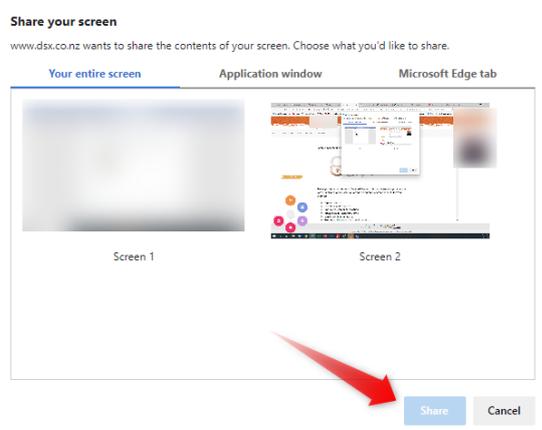
Video Signing Meeting – RON Meeting

Video Signing Meetings starts with the host, all participants will wait until the host starts the meeting.

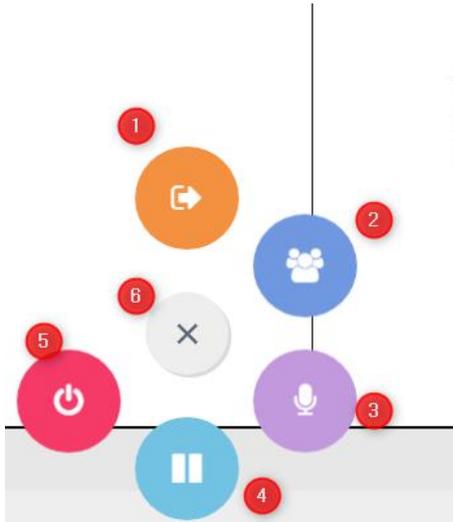
The host starts the meeting by clicking on their email invitation to host the Video Signing Meeting.



The host will be required to share their screen for video meeting recording



The Meeting Buttons Control

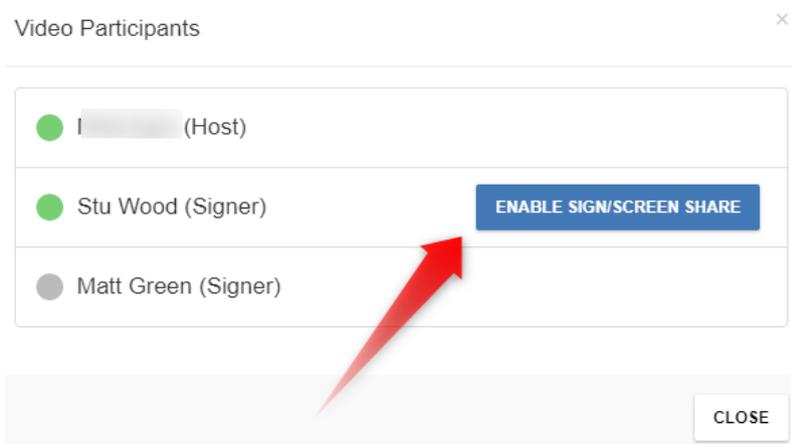


1. Leave the meeting, if the Host leaves the meeting it will stop the meeting for all participants after 5 minutes.
2. Manage Signing – manage the signing process, and who signs when.
3. Mic mute/unmute
4. Pause Recording / Start Recording, by default recording will auto-start
5. End Video Signing Meeting for all participants.
6. Close menu

Manage Signers

The Manage signer button allows host to manage the signing process who will sign and share their screen next.

In the image below only the host and Stu Wood are online in this meeting and Stu is ready to sign. The host needs to click on the Enable Sign/Screen Share button.



Once the host clicks 'Enable Sign/Screen Share' then the Invitee will start to share their screen and sign or fill-in and sign.

Sync all here

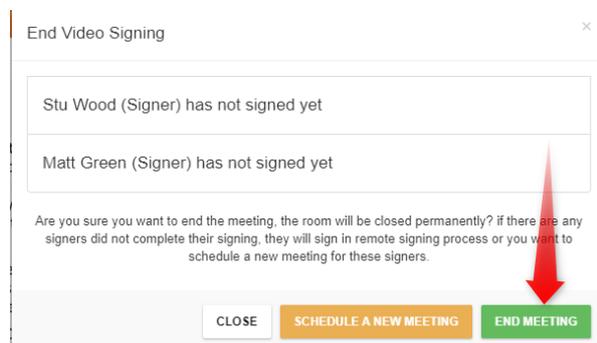
The host can scroll to any page on the document and click 'Sync All Here' to bring all the participants screens to same location on the document.



End Meeting

The host can end the video signing meeting for attendees, if all invitees have signed, the end of meeting screen will show, and signed document will be sent automatically to all parties.

In case some participants didn't join the meeting and or sign the document, the host can end the meeting for all and invitees that didn't sign will receive an invitation to sign remotely, without Video Signing

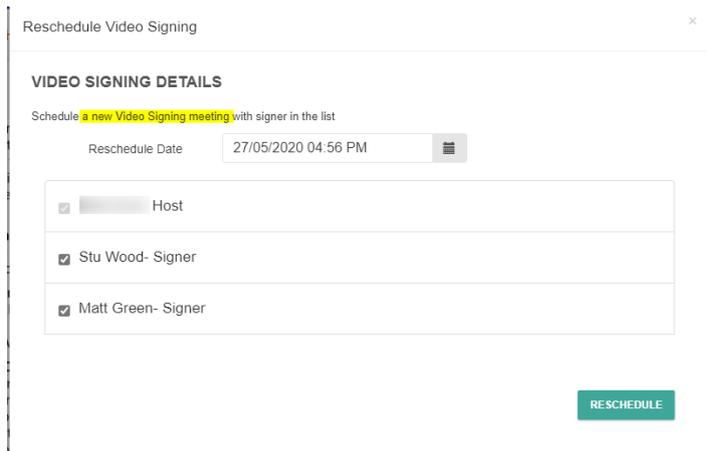


Or the host can schedule a new Video Signing meeting for invitees that didn't already sign.

Reschedule a new meeting

The host can setup a new date and time for a new meeting with any invitees that didn't sign, this new meeting will require Video Signing credits to schedule.

Email invitations will send out to participants for the new date and time for the Video Signing Meeting, they can join the new meeting from this invitation. .



eNotary

An **eNotary** is a Notary Public who notarizes documents electronically. One of the methods employed by eNotaries is the use of a digital signature and digital notary seal to notarize documents and validate them with a digital certificate. Electronic notarization is a process whereby a notary affixes a digital signature and notary seal using a secure Public key to an electronic document (such as a PDF or Word document). Once affixed to the digital document, the document is rendered tamper evident such that unauthorized attempts to alter the document will be evident to relying parties. The e-notary will use a cryptographic X509 Certificate and Public key infrastructure to create, manage, distribute, use, store, and revoke the digital certificate. The Electronic Notary also must keep an electronic register of each act performed.

RON – Remote Online Notarization – Secured Signing; eNotary with Video Signing- in many countries and states that permit electronic notarization, "satisfactory evidence of identity" may be based on video and audio conference technology, in accordance with the standards for electronic video and audio communications set out in the law that permits the notary to communicate with, and identify the principal at the time of the notarial act, provided that such identification is confirmed by (a) personal knowledge, (b) an antecedent in-person identity proofing process or (c) a valid digital signature.

By enabling Secured Signing eNotary you agree to <https://www.securedsigning.com/eNotaryTerms>

eNotary Setting

One place to set up Secured Signing for Notary

Enable eNotary – Set Up

Using eNotary requires a Secured Signing paid account.

To enable eNotary go to 1.) My Account -> 2.) My Setting -> 3.) eNotary

4.) Upload your Notary Seal

5.) Upload your Notary Graphical signature

If you want to remove the eNotary function just click delete and the function will be removed from your account.

For accounts with Multiple users – Any users in the account can be notaries by uploading their Notary seal and signature.

In order to use eNotary function you need to buy Secured Signing Credits, the best option is to use auto top so you always have credit to preform eNotary.

Notaries based in the United States;

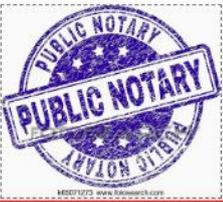
The notary must enter their Commission ID, and commission Expiry date based on their eNotary seal.

If the Notary tries to notarize a document after the commission expiry date the system will stop them from doing so, as the Notary must upload a new eNotary seal and update the commission expiry date.

The Notary is fully responsible for maintaining this and keeping it up to date.

Auto Topup

Setup eNotary



Commission ID:

Commission Expire Date:



Online Notary Act

You can add Online Notary act wording that will appear under your Notary Seal

Secured Signing already has default wording:

“This remote online notarization involved the use of audio/visual communication technology”

You can edit this wording to meet your Secretary of State’s requirements for the eNotary settings page via ‘My Account’>‘My Settings’>‘eNotary’, and scrolling down to the Online Notary Act text box.



Online Notary Act:

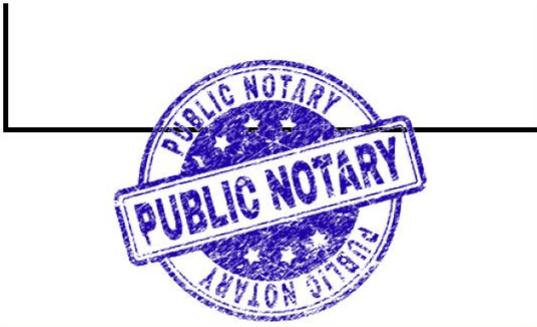
Commission ID:

Commission Expiry Date:

State:

County:





This remote online notarization involved the use of audio/visual communication technology

Set up Video Signing - Remote Online Notarization- RON

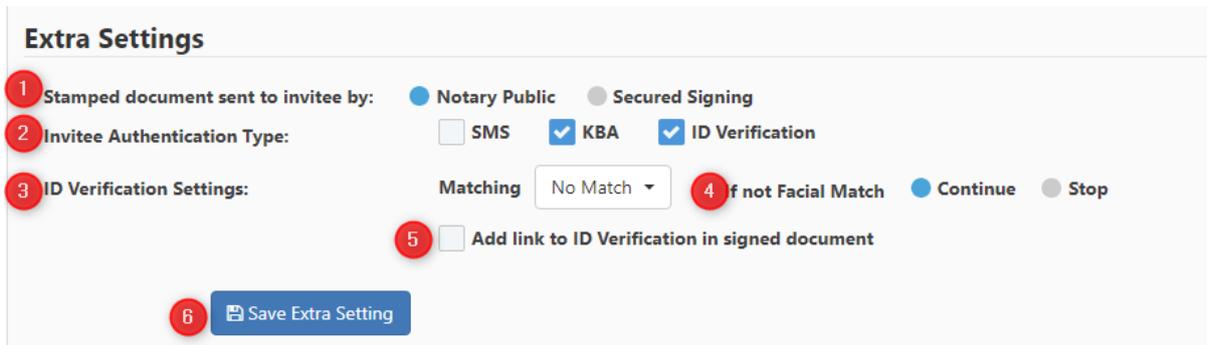
Setting your RON – Video Signing meeting

Video Signing - Remote Online Notarization (RON)

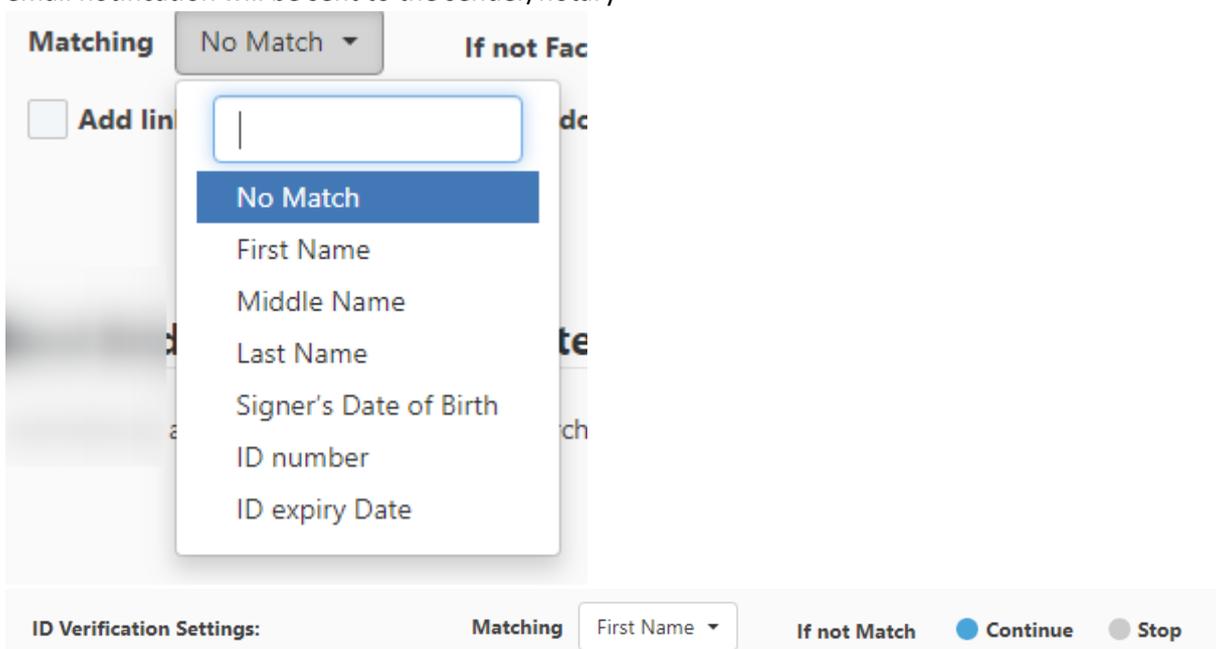
- Enable Video Signing 1
- Video Recording Storage Location 2
- Enable Recording Archive Storage 3
- Add Video Signing Page into Document 4
- Enable Recording Link in Signed Document 5

1. Enable Video signing – RON function within the eNotary solution.
2. Video recordings will be stored in your preferred encrypted cloud storage location, US, UK or Australia. The recording of the video will be removed 7 days after the signing process has been completed, unless the recording archive is enabled. You can download the recording at any time before removal.
3. Enable Recording Archive storage - if you want to keep the recording in Secured Signings cloud storage, you can access the recording from Secured Signing. This function has an additional monthly cost, see pricing for more information.
4. Add a page to notarized document with a link to access video recording and Video ID
5. Enable Recording Link in Signed Document – access to the recording of the video meeting via a link in the signed/stamped documents, is disabled by default. Once enabled a page is added to the document with the Video ID, URL link and password to access recording, it must be enabled with the Recording Archive storage if you want to access the recording from the signed document any later than 7 days, after completion of the signing process.

More Setting



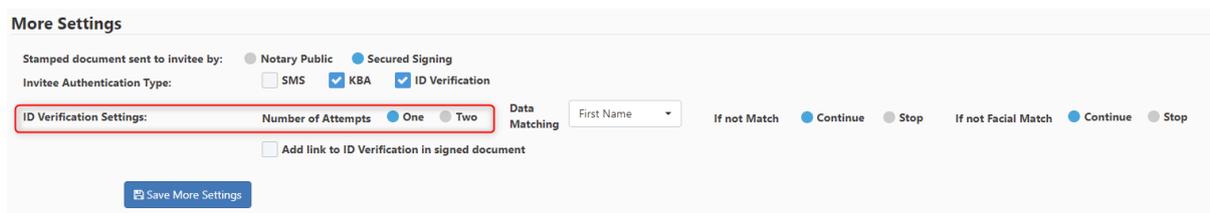
1. **Stamped document sent to invitee by Notary or by Secured Signing.** The Notary can set up if the system will automatically send the signed document to clients on completion or if the document needs to be sent manually by the notary. If the 'Notary Public' option is chosen, the notary has full control of when the client will receive the signed notarized/stamped document, and can be held until payment by the client is completed.
2. **Invitee Authentication Type** - many US states require a RON meeting to include Identity proofing – Knowledge-based Authentication (KBA) and Credential Analysis - ID Verification before starting/joining a RON meeting. Tick KBA and ID Verification to include these in your process. SMS adds extra security to access the signing process with an SMS code that will send to the clients mobile phone. You need to know and enter the client's phone number during the invitation process before sending the document.
3. **ID Verification Setting** - you can set up matching data that you already know about the invitee, and therefore should appear on their ID such as names, DOB, ID Number, ID Expiry date. If this doesn't match, you can set the process to stop or continue. By Default if data doesn't match the signing process continues. In any case, if something doesn't match an email notification will be sent to the sender/notary



4. **If No Facial Match** - You also can perform a Facial Match, if the Face Matching with the ID picture is below the minimum score the face matching result will be failed. You can set the process to continue or stop the signing process. In either case an email notification will send to the notary/sender stating the face match has failed
5. **Add a link to ID Verification results in signed document** – this link will allow anyone who has a copy of the document to access a page with the official name of the signer/invitee as it was on the ID , type of ID used, date of the check and results of the check (pass or fail).
6. **Save extra setting.**

Please note: invitee can do the KBA and ID Verification any time before the RON meeting, and then just click on the email invitation and it will take them to join the meeting if they previously passed KBA and ID Verification

ID Verification Number of Attempts



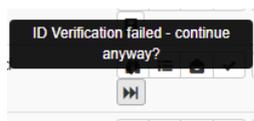
The Signer/client needs to capture/scan a clear picture of their Government ID. Sometimes this image doesn't pass **due to the edges of the image being cut off or the invitee's finger covers some of the ID.**

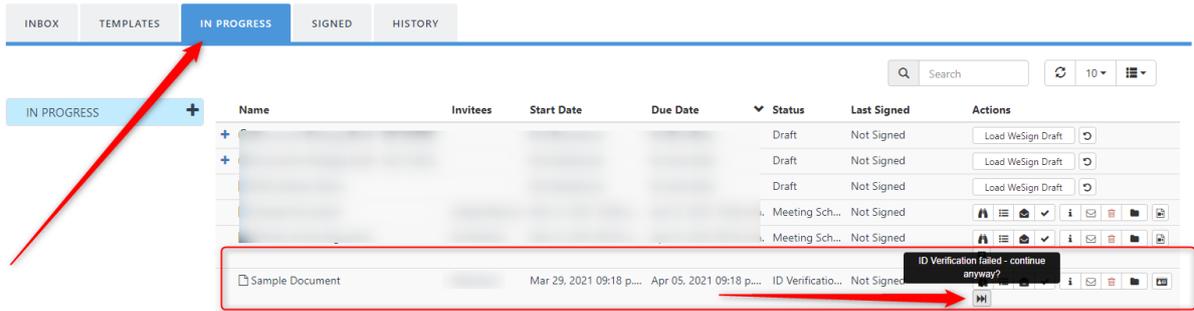
The default is one attempt however it is recommended to allow 2 attempts for each signer, please keep in mind the the 2nd attempt if used will cost an additional round of ID Verification.

To make a 2nd attempt the signer will have a button on the notification that ID Verification has failed, with a 'Try Again' Button .

In case the invitees fails both attempts at ID Verification, the signer/client can't access the RON/Video Signing/signing process, however the sender to can manually allow the signer/client to access RON/Video Signing/Signing process.

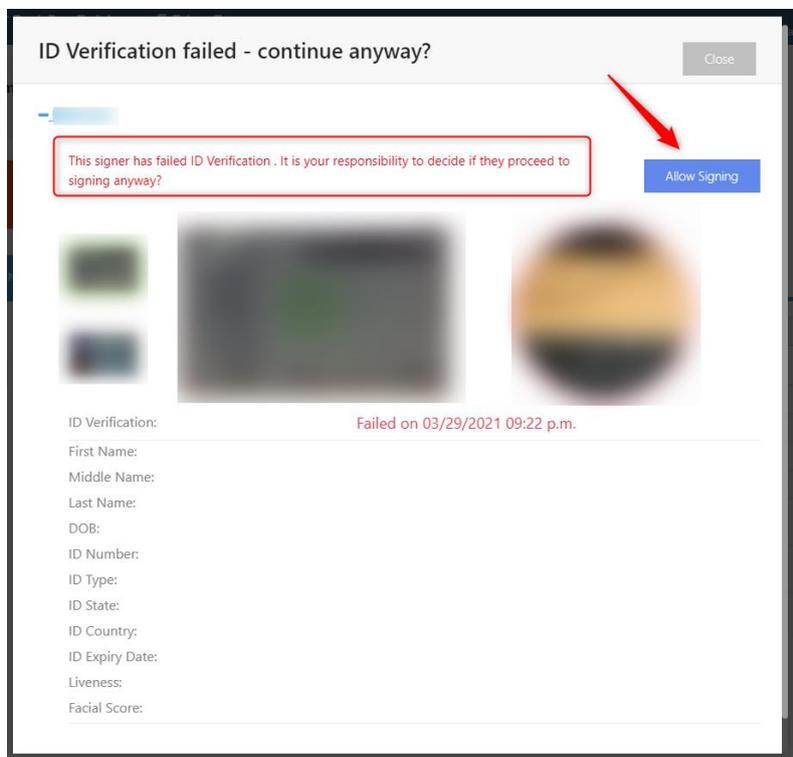
Go to In Progress Tab -> find the document -> Click in THE Icon





You will see the list of clients who failed ID Verification, click on the names you want to proceed with the signing and press the allow signing button (see above).

This signer has failed ID Verification. It is your responsibility to decide if they proceed to signing anyway?

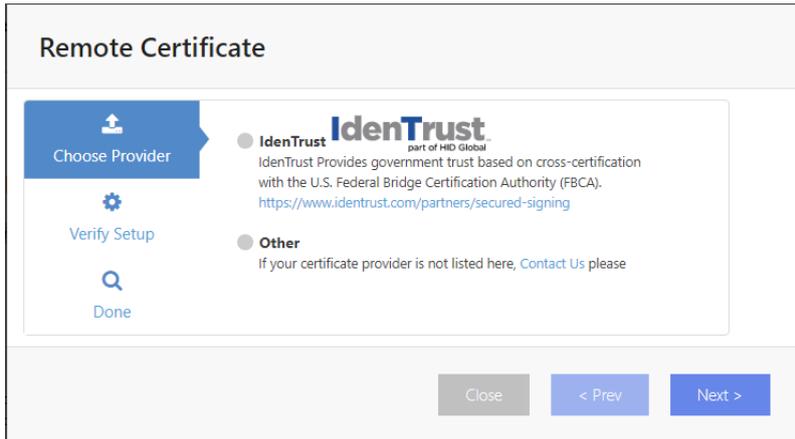


Signer needs to click on the link in the email invitation to access signing process even failed ID Verification once the process above used.

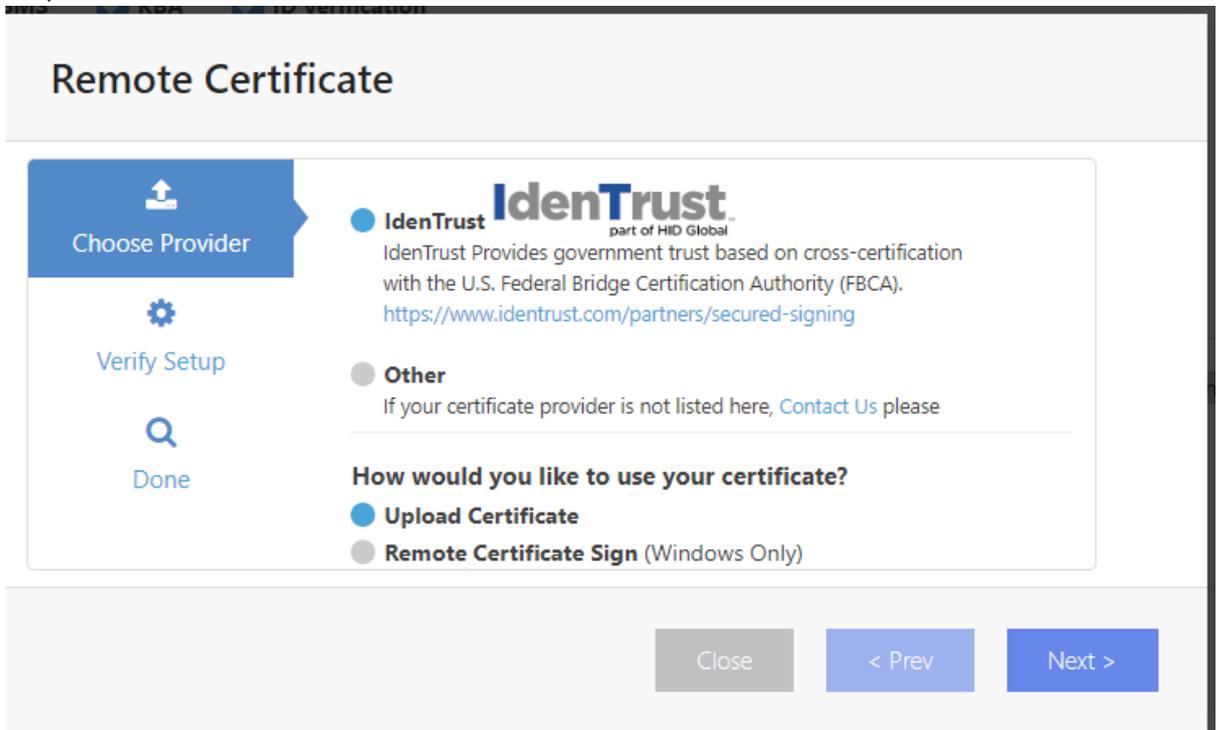
Tamper-Proof Notary X509 Federal Bridge Digital Certificate IdenTrust

If your state requires you to use a Digital Certification from an approved provider, you can purchase one from IdenTrust here <https://www.identrust.com/partners/secured-signing>

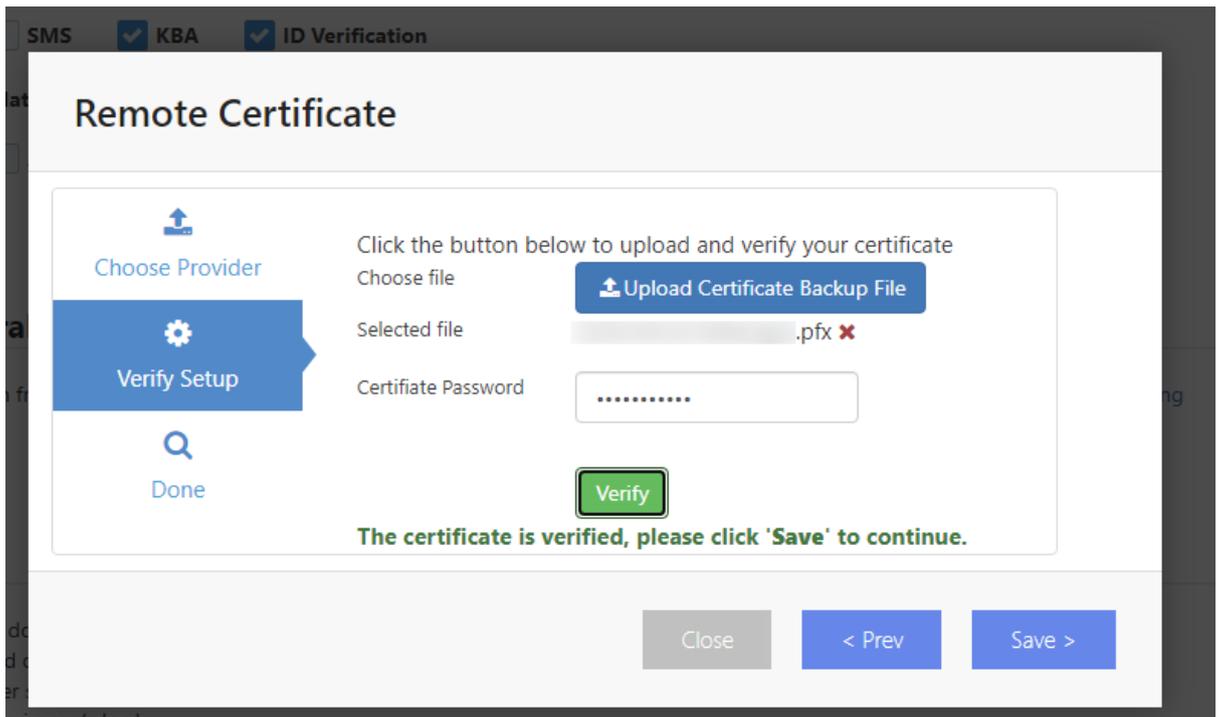
Click Set up Certificate to do the setup for a remote certificate.



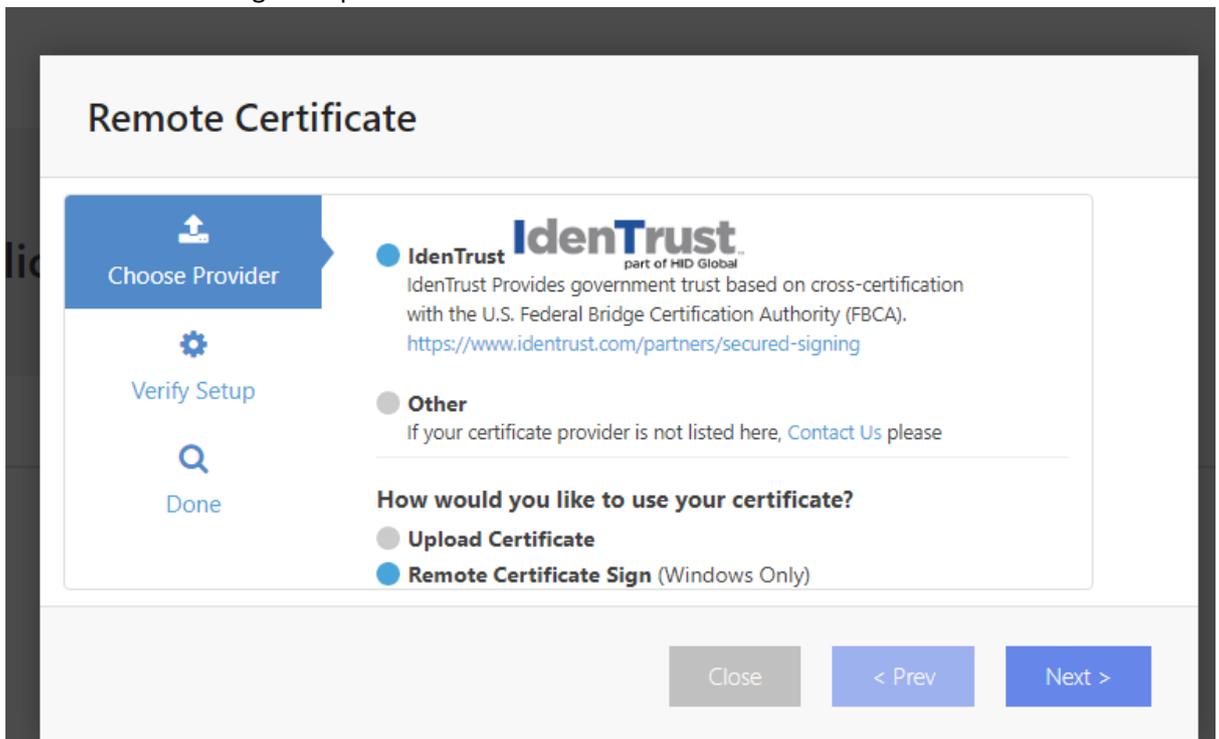
1. Select the certificate provider and the way you want to use your certificate. You can upload it to Secured Signing or install the app in your Windows workstation to use the certificate on-premises.



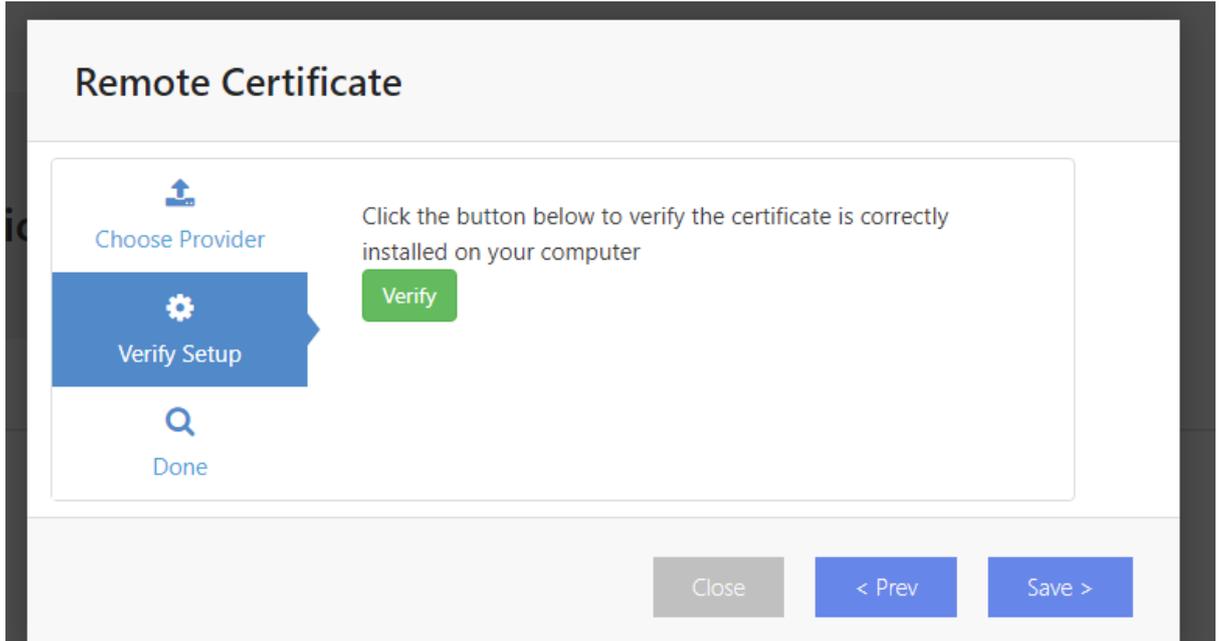
2. **Upload Certificate process** – The backup file you created while installing the certificate in your desktop browser. You need to use your password in order to access the file and then press verify, (please ensure you’re uploading the certificate for signing not for encryption), once verified press save and you’re ready to use it in the signing process. Every time a Notary will notarize or sign a document we will use this certificate to create an X509 Digital Signature.



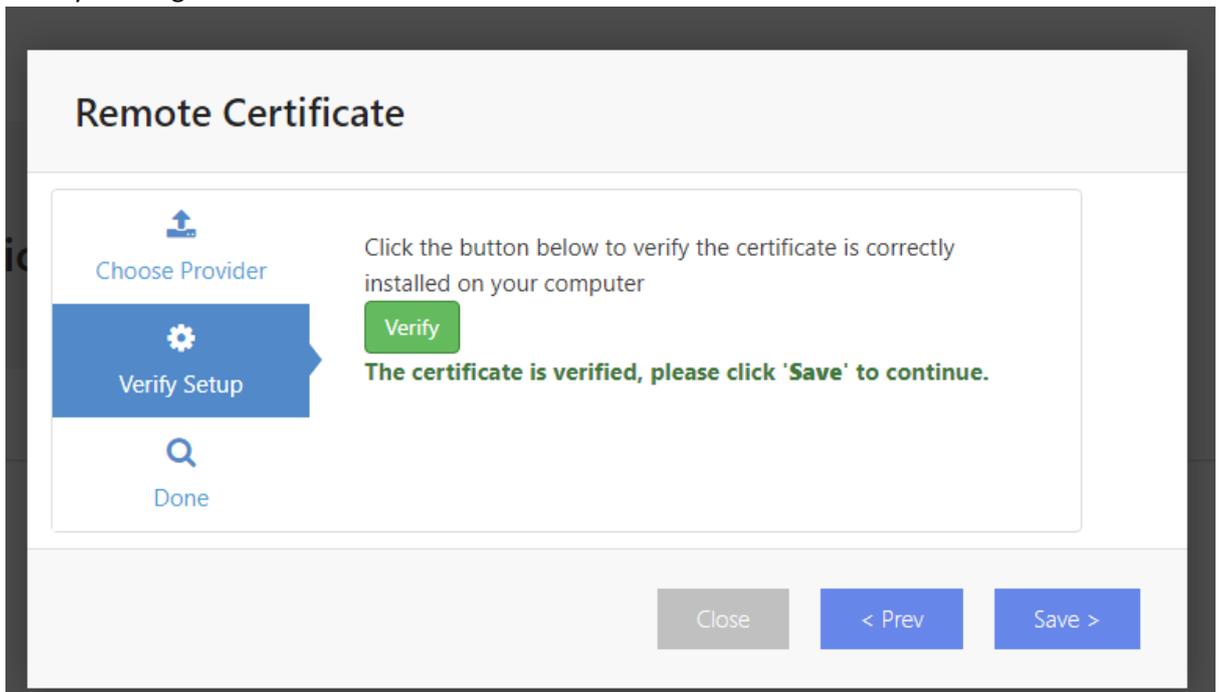
3. Upload certificate Process – In case you have a USB token/hardware to store your certificate or you want to keep the certificate on your premises/Desktop windows OS only, select remote Certificate Sign and press next



4. Click verify to select the right certificate in your PC , and enter the certificate password



5. Then you will get this screen



6. Once saved you will need to download and install the Secured Signing Remote Certificate Sign App in your PC, click download to do it now. You can also do this later, or the first time you need to sign .

Once

Remote Certificate

 Choose Provider

 Verify Setup

 Done

Click the button below to download **Secured Signing Remote Certificate Sign App**

[Download](#)

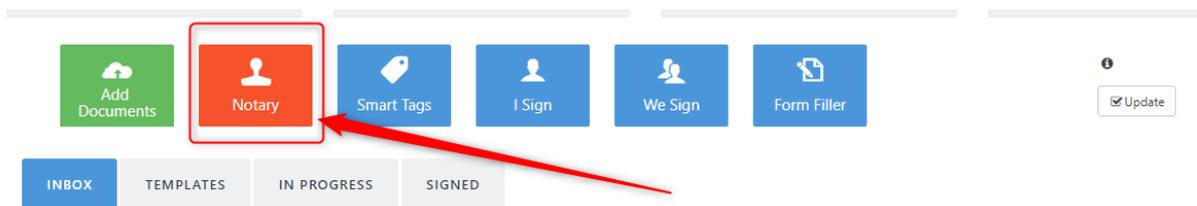
Follow the instruction infomaintion to instaill and setup the application on your computer (Windows desktop only). Please be aware to intall the Remote Certificate Sign app, it may take some times, based on your PC performance.

[Close](#) [Done](#)

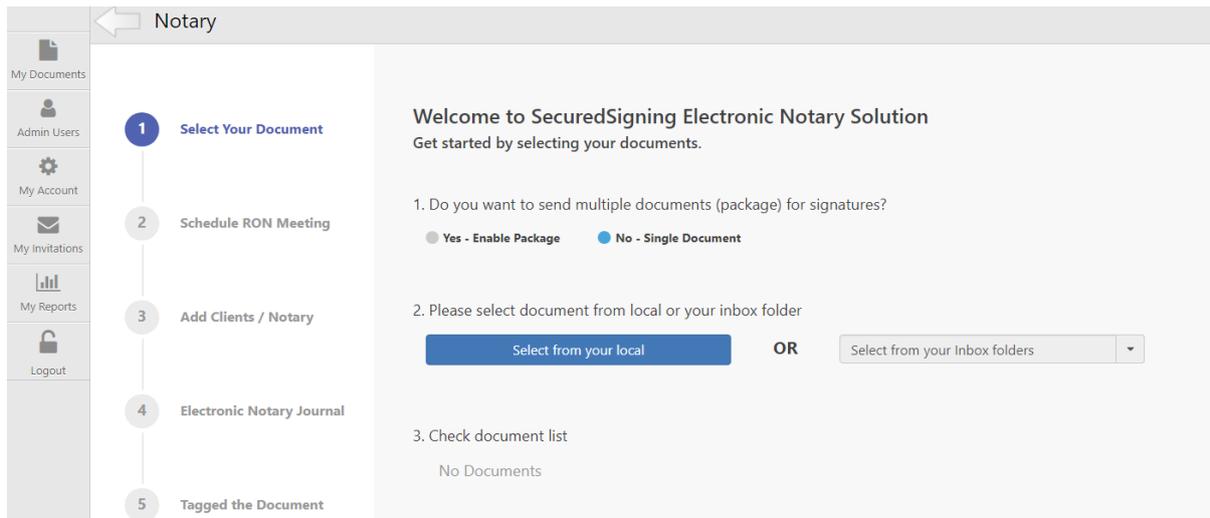
Notary Wizard

Secured Signing offers an easy way for Notaries to set up a Notarization process.

Click on the Notary Button to start



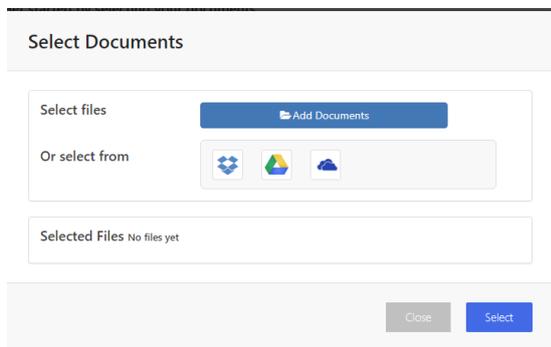
Then you will see this screen.



Step 1 - Select Your Document

You can create a single Document process or create a package of multiple documents. Documents can be uploaded as files in your PC/hard drive, or Cloud storage

Select documents from your PC, local hard drive or Google Drive, Dropbox or OneDrive Account or if already uploaded, from the Secured Signing Inbox folder.



Once selected press next.

Step 2 – Schedule RON Meeting

Enable RON and schedule an online notarization meeting, the date and time for the RON meeting should be before the signing due date. If you need to extend this due date and reschedule the RON meeting later, you can do so from the 'in Progress' tab.

- 1 Select Your Document
- 2 **Schedule RON Meeting**
- 3 Add Clients / Notary
- 4 Electronic Notary Journal
- 5 Tagged the Document

Video Signing - Remote Online Notarisation (RON)

Enable RON

Schedule an Online Notarization Session 

Schedule Date Time

Please schedule video signing meeting

Identity Proofing and Credential Analysis

KBA - Identity Proofing

ID Verification - Credential Analysis

Personal Knowledge

Credible Witness

Set up the Identity Proofing and Credential Analysis as needed. By default KBA and ID Verification are selected.

Identity Proofing and Credential Analysis

KBA - Identity Proofing

ID Verification - Credential Analysis

Personal Knowledge

Credible Witness

Personal Knowledge means the Notary knows the client and is able to identify the client with just the RON meeting.

Credible Witness – Client is unable to provide ID Verification, or you know a witness that can identify the client. This witness needs to be added to the signing process and needs to pass KBA and ID verification.

Please Note: an invitee can do the KBA and ID Verification any time before the RON meeting, and then use the email invitation to join the meeting if they have already passed KBA and ID Verification

Step 2 - Florida - Vulnerable Adult

Secured Signing supports VA for Florida

These are special accommodations that Florida notaries require for RON, when notarizing certain documents, see here for the Florida law that specifies what a RON Technology Provider must do:

http://www.leg.state.fl.us/statutes/index.cfm?App_mode=Display_Statute&Search_String=&URL=0100-0199/0117/Sections/0117.285.html

In case the notary is from Florida and witnessing certain documents.

You will need it if you are Notarized and Witness these types of documents but not limited:

1. Last Will and Testament (Or a Codicil to a Will)
2. A Trust with Testamentary Aspects
3. A Healthcare Advance Directive
4. A Waiver of Spousal Rights
5. A Power of Attorney Authorizing any of the transactions specified in Florida Statute 709.2208

Then select Yes below



The Signer have an additional set of questions and a statement after KBA is completed. Based on their answers the signer will move on to ID Verification before signing.

Step 3 – Add Clients / Notary

Add Client/Witness names and email addresses and setup ID Verification matching if needed. You can also select which Notary will run the session, in the event you have multiple Notaries on your account.

← Notary

- 1 Select Your Document
- 2 Schedule RON Meeting
- 3 Add Clients / Notary
- 4 Electronic Notary Journal
- 5 Tagged the Document

Client Details – Invitees

+ Add Invitee

Email Address	First Name	Last Name	ID Verification Matching	Match With
ssl@dsx.co.nz	LORRAIN	ADORNATO	No Match	

Notary Details

Notary Full Name	Notary E-Mail
Notary Public	notary@securedsigning.com

Step 4 - Electronic Notary Journal

Secured Signing provides an Electronic Notary Journal. That is generated at the end of the signing process.

← Notary

- 1 Select Your Document
- 2 Schedule RON Meeting
- 3 Add Clients / Notary
- 4 Electronic Notary Journal
- 5 Tagged the Document

Electronic Notary Journal

Use Electronic Notary Journal

Document Title	Type of Notarization	Other Type of Notarization	Notary Fee
Secured Signing eNotary Partner	Nothing selected	Please input other types if any	

Principal Details - Name

LORRAIN _____ Middle Name _____ ADORNATO _____

Previous
Start

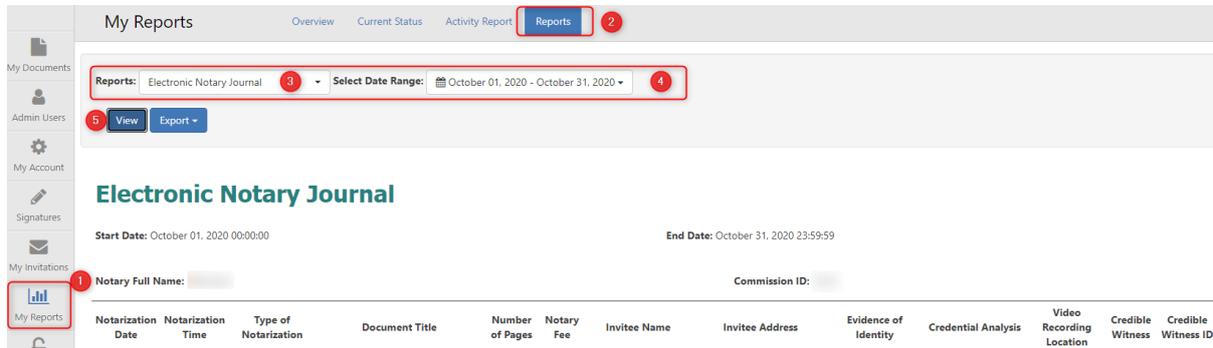
Edit the document name, select the type of Notarization, and enter the Notary Fee.

The journal appears as below;

Notary Journal												Export	Close
Electronic Notary Journal													
Notary Full Name: _____						Commission ID: _____							
Notarization Date	Notarization Time	Type of Notarization	Document Title	Number of Pages	Notary Fee	Invitee Name	Invitee Address	Evidence of Identity	Credential Analysis	Video Recording Location	Credible Witness	Credible Witness ID	

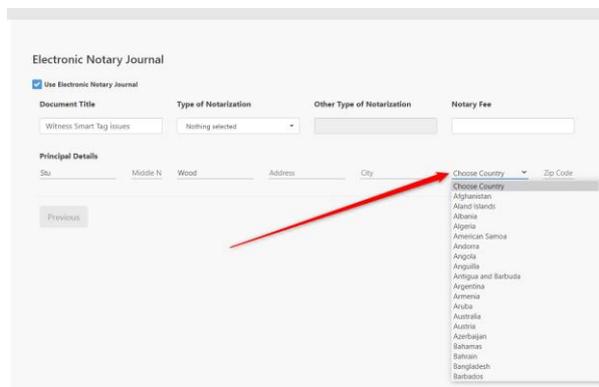
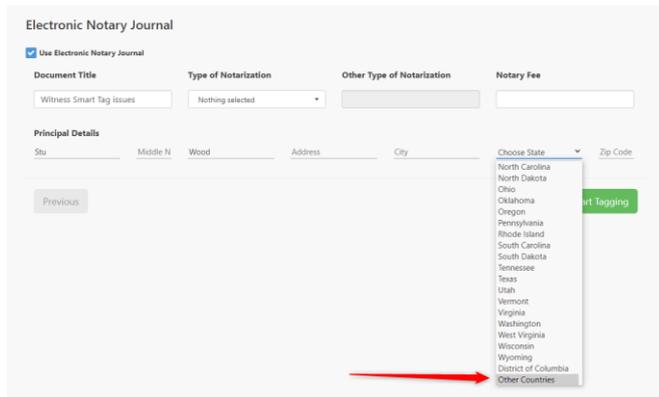
You can export the Electronic Journal to PDF or an Excel file for your own use.

In My Report page you can run an Electronic Notary Report to cover notarizations done in a selected time period.



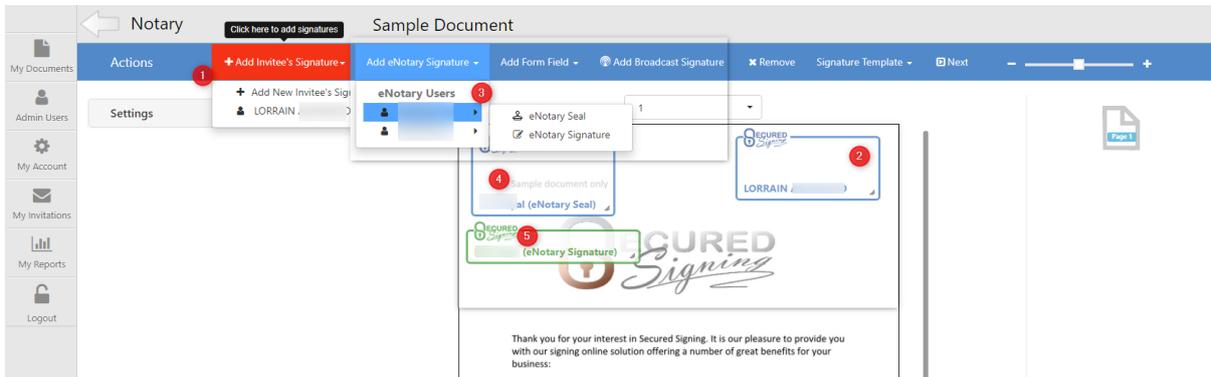
Notary Journal Address not in US – overseas address

If the signer’s address is not in the US scroll to the bottom of the list and click Country to select the country the signer lives.

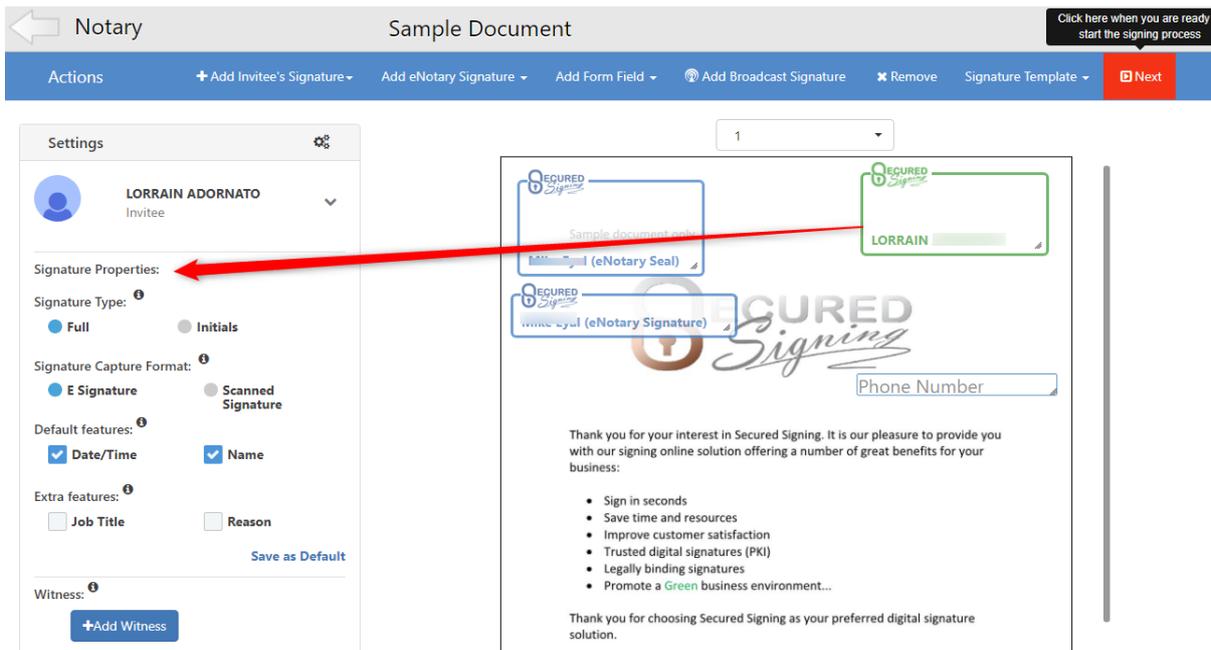


Step 5 – Tagging the document

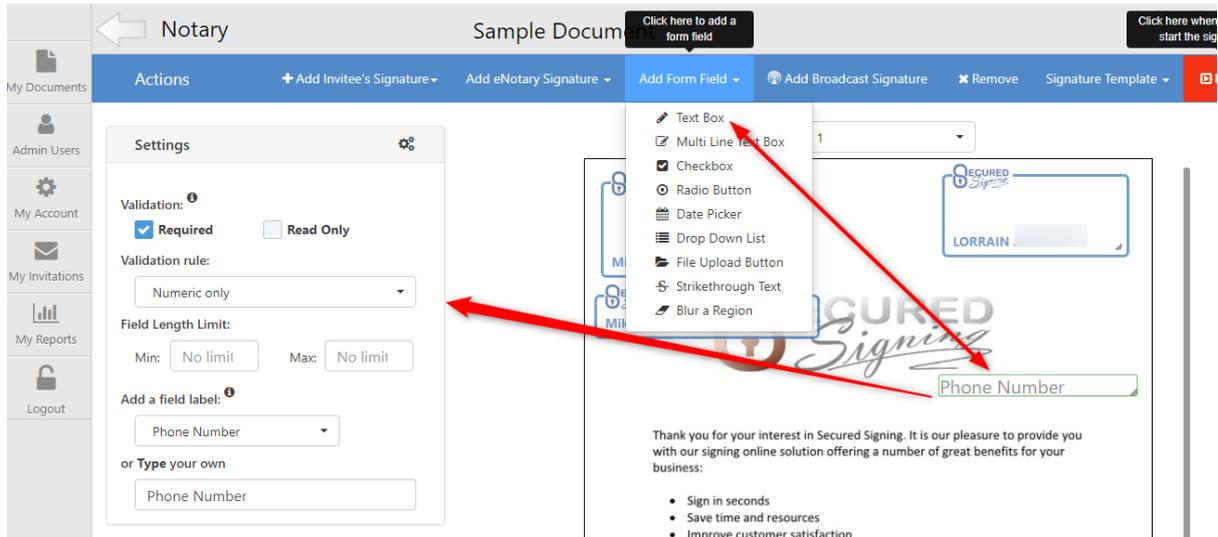
Before sending out the invitation for a RON meeting the document needs to be prepared, by adding signature fields and notary fields/stamps.



Set up the Signature Properties, full or initial Signatures, name and time stamp will be included in the signature as below,



Add form fields to be filled in online by the invitee/client/signer as below;



Once all signatures have been added for all signers and the Notary, position them in the right place in the document and press next. If missing a signature press cancel from the 'Confirm Invitation Workflow' popup to go back.

In the 'Confirm Invitation Workflow' Popup you can:

1. Set up the signing due date, the default is 7 days from sending the email invitation. We will send 2 auto-reminders if the document is not completed by the signing due date. Be sure the due date is after the RON meeting date.
2. Schedule Video Signing - RON meeting date and time
3. Check signer details, you can update them here.
4. Check the Identity Proofing and Credential Analysis meet your Notarization requirements, you can update them here
5. Edit email invitation or send a personal message.

Confirm Invitation Workflow

Settings | More Features | Electronic Notary Journal

Due Date ¹
October 31, 2020 5:03 pm

Signing Order Type ¹
 Sequential

Video Signing
 Enable

Schedule Date Time ²
October 26, 2020 4:20 pm

Check Invitees

1. LORRAIN ADORNATO ⁵ [Edit Invitation Email](#)

LORRAIN ³

Authentication: KBA + ID Verification
Matching: No Match ⁴

If not Facial Match Continue Stop Add link to ID Verification in signed document

Video Signing

Check the Notary Information is correct, the Notary will be the host for the RON meeting.

2. Mike Eyal (eNotary) [Edit Invitation Email](#)

Video Signing

Mike Eyal - Video Signing Host

Cancel Send Next

Press Next to confirm the Notary journal information.

Once confirmed press Send.

Confirm Invitation Workflow

Settings
More Features
Electronic Notary Journal

Use Electronic Notary Journal

Electronic Notary Journal

Documents

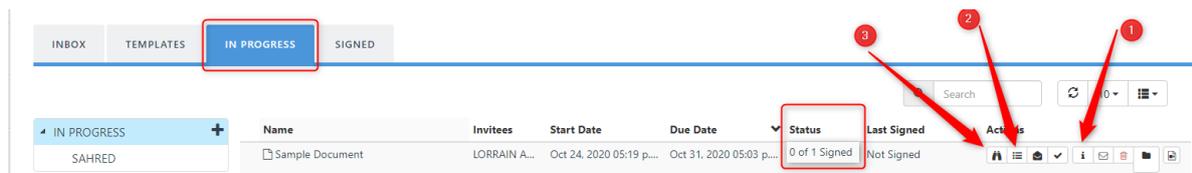
Document Title	Type of Notarization	Other Type of Notarization	Notary Fee
Sample Document	Acknowledgment	Please input other types if any	\$25.00

Invitees

Principal Details - Name

Cancel
Previous
Send

You have **full visibility of the signing process** in the 'In Progress' Tab.



1. Check the signing status, and update invitee details if signing hasn't been completed yet.

Sample Document

Due Date

Extend

Video Signing Enabled

Video Signing Schedule

Invitee, Video Signing Host, Video Signing

1. Invitee, Video Signing Participant - Not

Video Signing

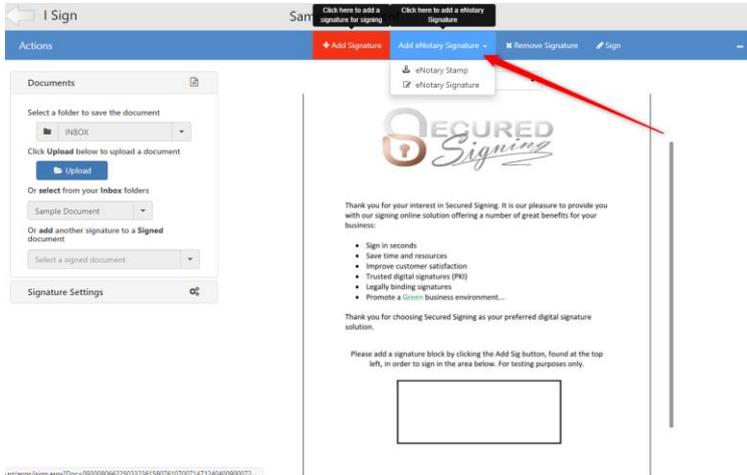
Close
Update

2. Document Log – all action/steps in the RON/Signing process. This functions as your audit Log.
3. View the document at the current stage of signing.

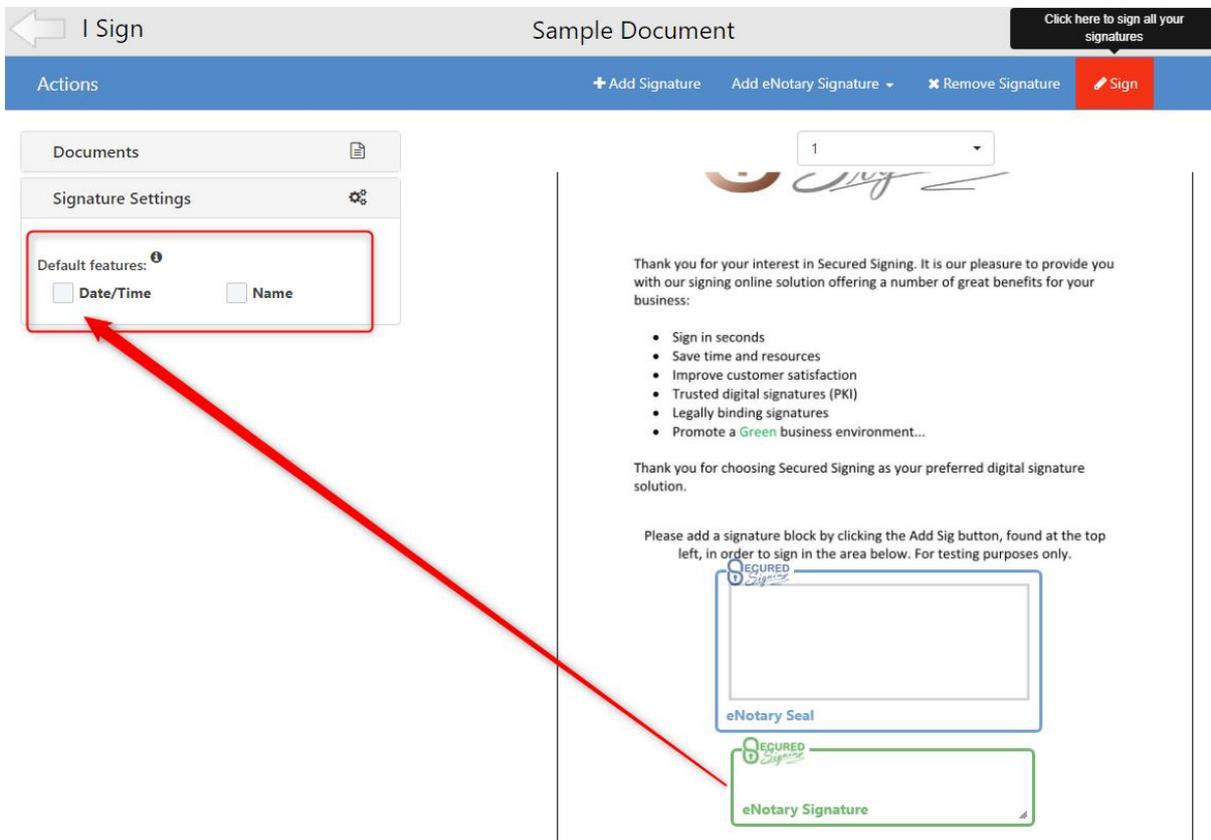
37 | Page

eNotary I Sign

To Notarize a document that only the Notary Public signs, the 'I sign' process is the best option, the notary can stamp and sign the document without any invitation process.

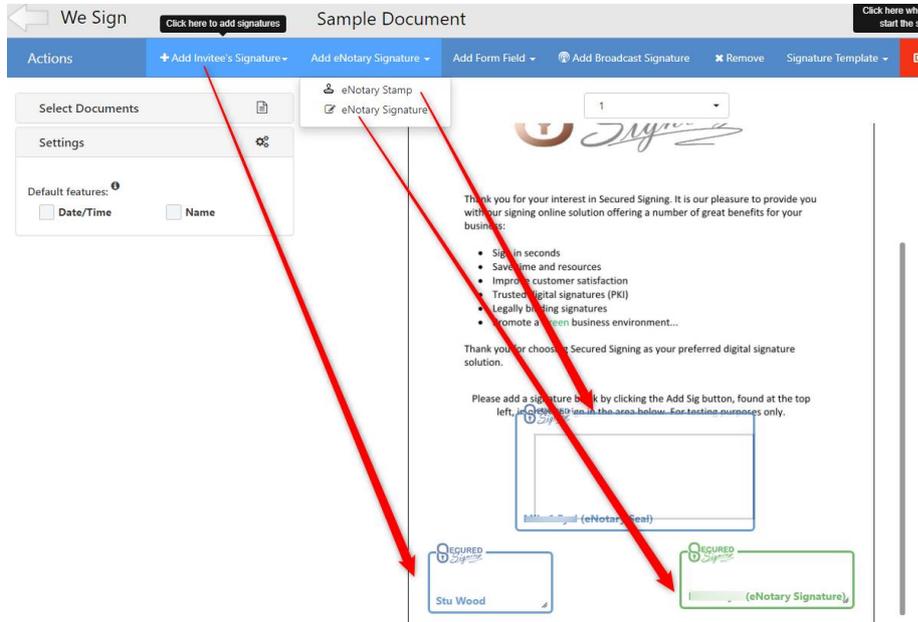


The eNotary Seal has a set size based on the image uploaded. You can resize the eNotary signature and also add a name and date.



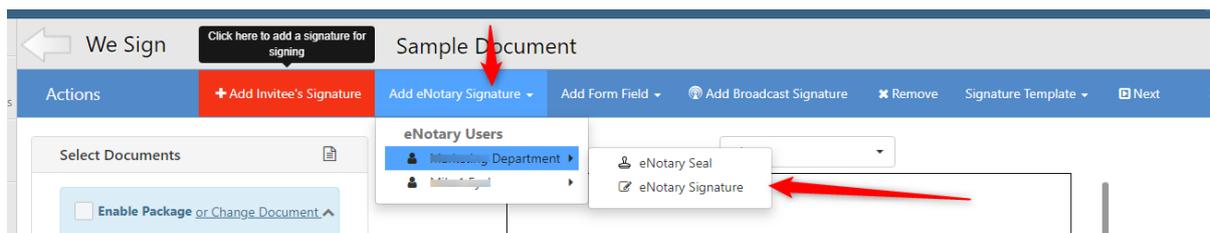
eNotary We Sign

In We sign you are able to invite any person to sign the document remotely or in person, with the Face To Face process and invite the Notary to notarize the document.



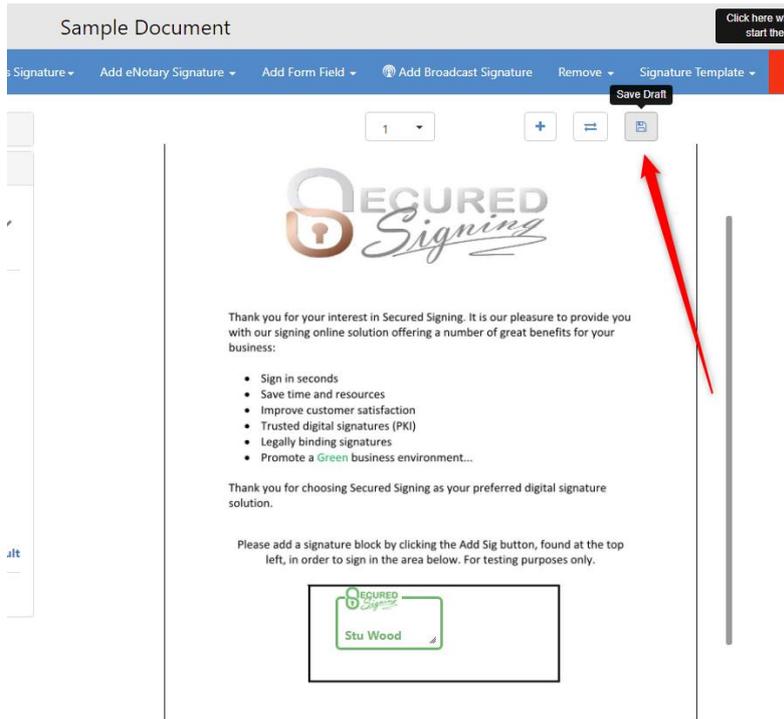
In case the account has multiple users or is part of an enterprise account plan, users can invite the appropriate Notary from the list to notarize the document.

You can add Form Fields as well if you need information captured in the document, during notarisation.

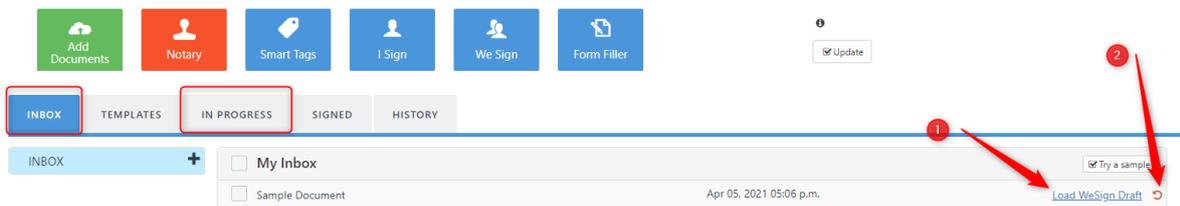


Save draft

Senders can now save drafts and continue tagging the document later. Every 5 minutes a draft is also auto-saved.



Once a draft is saved it will appear in the Inbox and In-Progress tabs .



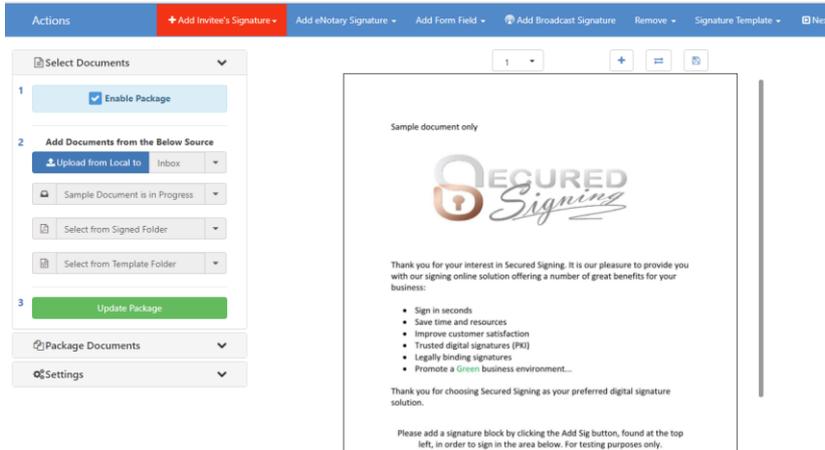
1. Load We Sign Draft - To open and continue tagging the document.
2. Remove Document Draft - Remove all fields and signatures and from the document.

Add Document

If you need to add a document to a package after you have started placing signatures, you can add document and create a package in preparation stage.



The document can be added from your desktop, inbox, signed folder, or the template list.

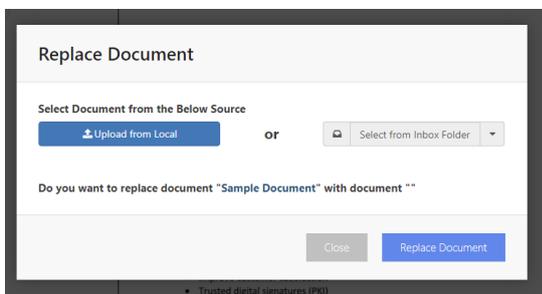


To do this select the document and click update package.

Replace Document

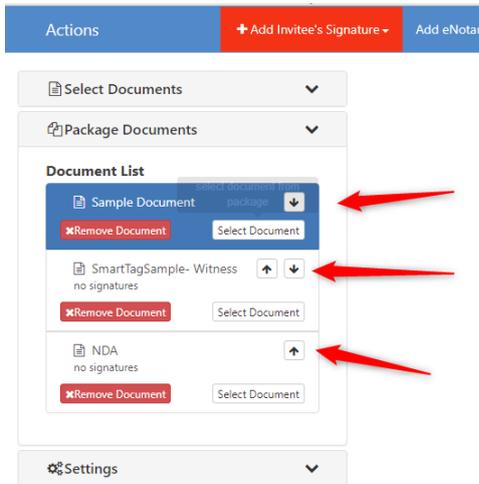
To replace a document and keep all form fields and the signature fields in place on the document select the replace document button.

If the new file differs in size to the original you may need to do some fine tuning for form fields and signature position, however they will all remain in place.



Documents order in Package

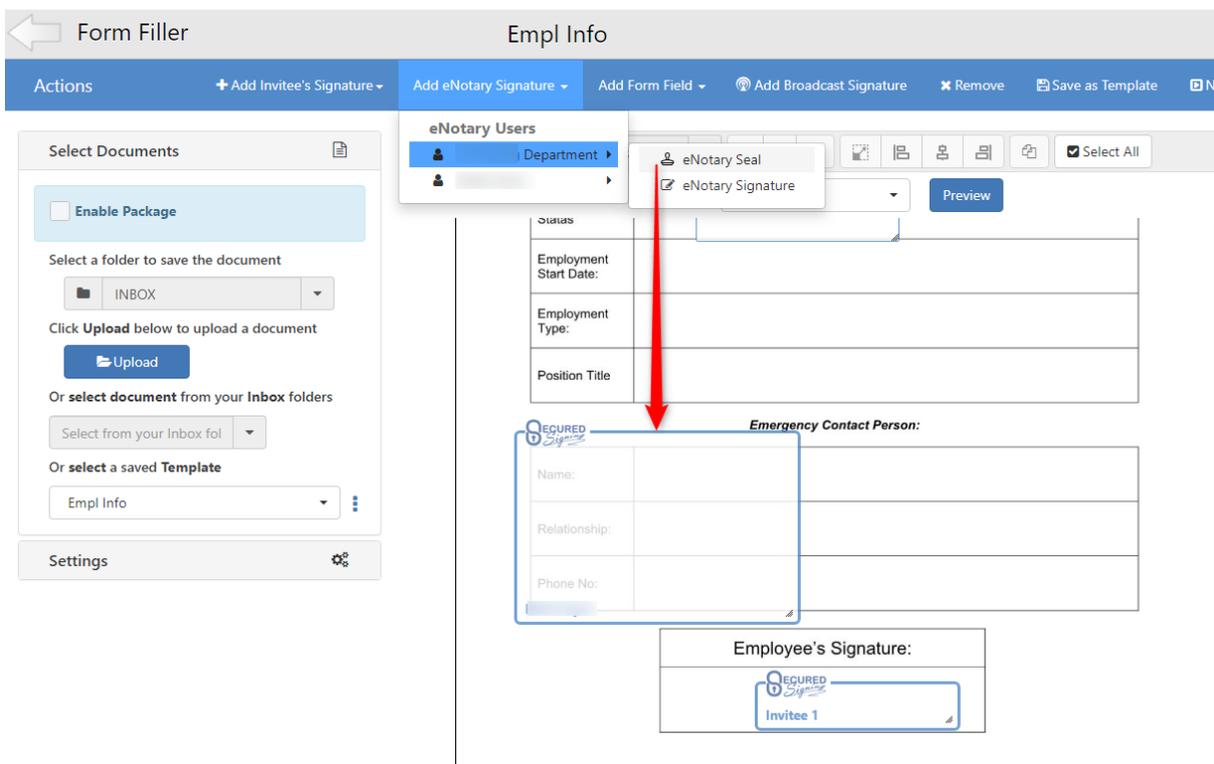
To change the document order in a package, use the up and down arrows in the document list. The top document will be the first in the signing process.



eNotary Form Filler Template

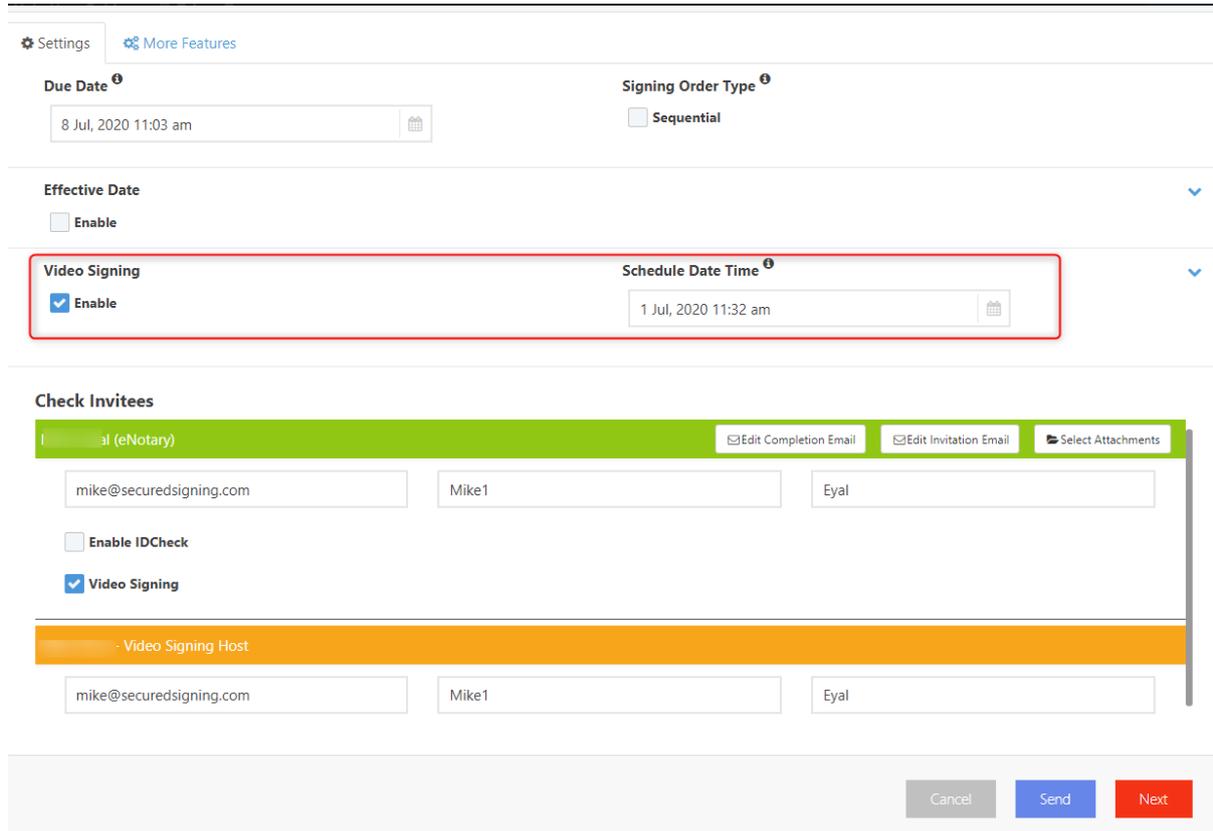
While designing a Form Filler template you can add an eNotary seal or signature to the template and save it.

Send the document for signature and the Notary will receive an invitation to notarize the document.



eNotary with Video Signing – Remote Online Notarization

To enable eNotary with Video Signing for RON you just need to tick Video Signing in signing workflow popup



The screenshot displays the 'Settings' page for Secured Signing. At the top, there are tabs for 'Settings' and 'More Features'. Below this, the 'Due Date' is set to '8 Jul, 2020 11:03 am' and the 'Signing Order Type' is set to 'Sequential'. The 'Effective Date' section has an 'Enable' checkbox that is unchecked. The 'Video Signing' section is highlighted with a red border and has an 'Enable' checkbox that is checked. The 'Schedule Date Time' for Video Signing is set to '1 Jul, 2020 11:32 am'. Below the settings, there is a 'Check Invitees' section with a green header bar containing buttons for 'Edit Completion Email', 'Edit Invitation Email', and 'Select Attachments'. The invitee list shows two entries: one for 'mike@securedsigning.com' with name 'Mike1' and role 'Eyal', and another for 'mike@securedsigning.com' with name 'Mike1' and role 'Eyal' under the heading '- Video Signing Host'. At the bottom right, there are 'Cancel', 'Send', and 'Next' buttons.

During the Video Signing Meeting you can identify the person who will sign in the video call meeting and you can ask the signer to present to the camera Photo ID for identification'

To learn how to use Video Signing Look to [Video Signing](#).

Snapshot in RON or Video Signing Session

Often, a notary has the need to collect or capture an image of supporting documentation, credentials, or stipulations during the RON session. With Secured Signing's new Snapshot feature, you can capture that image, crop, edit and label on the fly.

The Snapshot feature allows for capture of up to 10 images per signer. They can be downloaded along with the document as a separate exhibit. Please note that after 7 days these images are removed from the platform.

[Watch a video](#) on how to use Notary Snapshot [here](#).



Notary Queue

Let's face it... We all know that receiving, placing, and returning requests for a RON notary is a time sensitive issue... Sound familiar? The requestor wants immediate confirmation that the job has been received and will be taken care of. Often, schedulers are buried in tedious tasks and fulfilling these requests can be daunting, due to special circumstances or the "end of month" chaos. Rather than delaying the process, you can experience automated speed without any setback! Secured Signing's new notary queue feature allows for a quick notary assignment to post into queue.

Simple, smart, and secure... Through our innovative technology, the request is immediately processed and assigned to a notary queue where an available notary can proceed with the job and the session invite forwarded to the signer.

Notary Queue is perfect for medium to large companies performing frequent signing services and have remote, in-house RON certified Notaries able to perform RON for the entire company.

The new feature supports the ability to have different roles/people assigned to the document that can prepare and tag as needed, a meeting host and a notary. The feature also allows for the company to run the notary signing service within the queue feature.

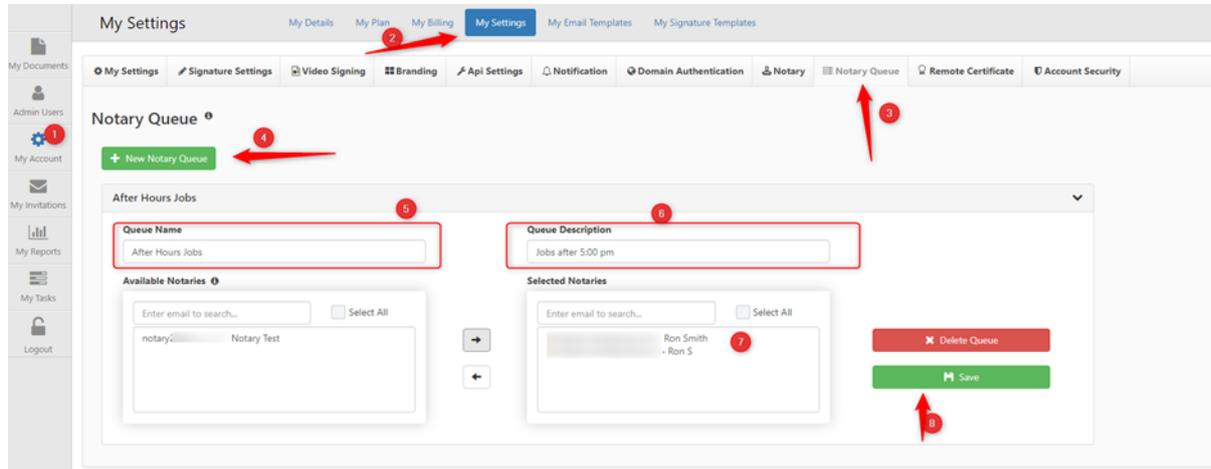
Using Secured Signing's API or a manual entry process, the scheduler enters the data and assigns it into a queue. A pool of your company's notaries can pick up the assignment or you can assign it directly to a specific notary of choice. This is also a great solution for enterprise clients who plug into a pool of notaries that fulfil session requests on a shift basis. Any notary on duty can pick up the assignment for immediate or future fulfilment. If they pick up the assignment by mistake or cannot complete the assignment, they simply return it to the queue for pick up by another notary.

Notary Queue Set Up

Admin Users within Team (up to 10 users/ Notaries) or Enterprise account (unlimited number of users/notaries) plan can setup unlimited queue and can assign available notaries to the queue.

An admin user can set up multiple queues based on types of transactions, time of the transaction or special language requests etc. You can create as many queues as you required.

[Watch a video](#) on how to set up Notary Queue [here](#).

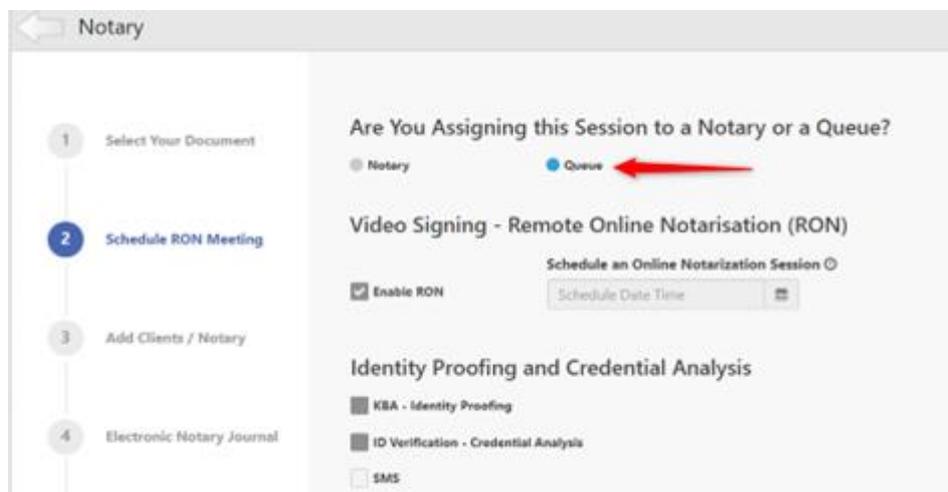


Assign job / documents to a Queue

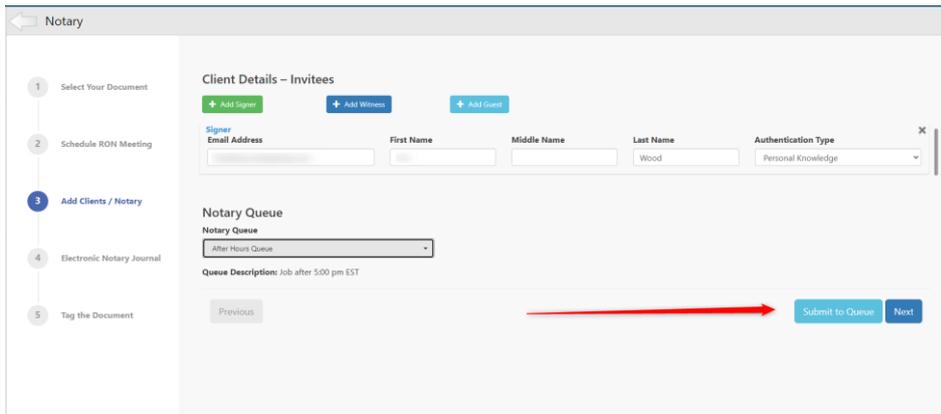
Once a preparer has submitted a document to the Notary Queue, the notary can accept the job, complete the document preparation, and invite principle/signer to join the Remote Online Notarization meeting.

Once the scheduler/preparer selects an assignment to fulfil the task, they can prep the document for signature and assign it for pick up by a notary in the queue. The session invite is simultaneously sent to the signer(s) advising them of an upcoming RON meeting. The admin can monitor the queue to ensure all sessions are picked up or they can assign it from the queue to a specific notary for fulfilment.

All queue members (notaries) will receive an email notification that job is posted to a queue. The principle (signers, witness, guests) will also receive an email notification that the job was assigned to a notary queue, and someone will be in touch, shortly.



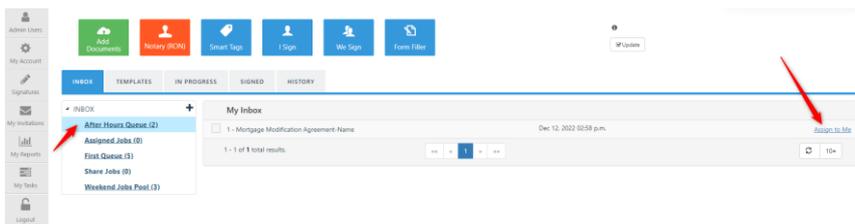
From step 3 you can submit to Queue or press next, the doc prep person can do the tagging as well and submit to q once ready



[Watch a video](#) of how to assign a job to the Notary Queue

Notary takes a job

Once Notary notified a new signing process add to a Queue the notary member of. The Notary can take the Job by click assign to me.



In case Notary took a job but cannot perform the task, they can assign it back to the queue for another available notary.

Queue Management

Admin users within a Team or Enterprise account plan have full visibility and control of the notary queues. The admin or those assigned in a queue have visibility of the queue for management and monitoring of the process, ensuring all submitted requests are fulfilled!

Document Owner	Document Name	Date Created	Last Sign Date	Status	Notary Queue	Assigned To	Actions
Ron Smith	[Blurred]	Dec 12, 2022 02:58 p.m.	Not Signed Yet	Draft	After Hours Queue	Not Assigned	[Icons]
+ Ron Smith	[Blurred]	Dec 09, 2022 05:32 p.m.	Dec 09, 2022 05:52 p.m.	Complete	First Queue	Ron Smith	[Icon]
Ron Smith	[Blurred]	Dec 09, 2022 05:24 p.m.	Dec 09, 2022 05:29 p.m.	Complete	First Queue	Ron Smith	[Icons]
+ Ron Smith	[Blurred]	Dec 09, 2022 11:21 a.m.	Not Signed Yet	Draft	First Queue	Ron Smith	[Icon]
+ Ron Smith	[Blurred]	Dec 09, 2022 11:17 a.m.	Not Signed Yet	Draft	First Queue	Ron Smith	[Icon]

Admin use can view status of specific Queue or Notary, allow him to delete the doc from the queue

Add Remove Signatures / Form fields

In RON or Video Signing Session you can add remove signatures and form fields during the signing online session.

By clicking on a field, you are given the option to remove it. You can also insert additional signature fields using the “Add Signature” button in the top right.

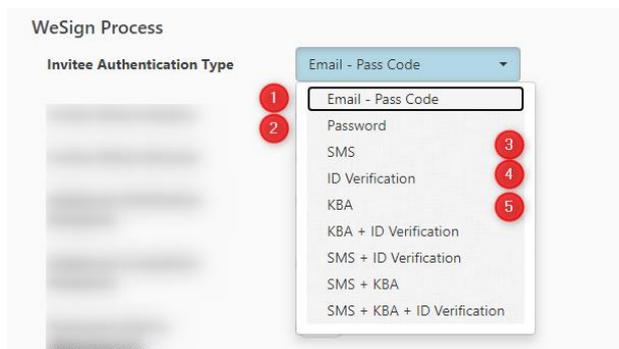
[Watch a video](#) on how to add or remove signature or form fields [here](#).



Invitee Authentication Type

You can find the setting for that in My Account → My Settings

Document security access has several authentication types. Invitees/signers need to pass the authentication type in order to access the signing process and view the documents they need to fill-in and sign.



You can use more than one Authentication type such as SMS + ID Verification.

Video Confirmation is an additional way to know who was behind the device at the time of signing.

Email / Passcode

Email invitations and reminders are sent to the invitee with a passcode. The invitee needs to click on the email link and enter the pass code that is in the email. This is the basic authentication level, based on email address confirmation by receiving the email.

Password

Invitee is required to create a Secured Signing password that meets the Secured Signing password policy. Once the invitee creates a password they can use it in other signing processes as well. If the password policy is enforced, the password must be replaced every 90 days.



SMS

Multi-factor authentication- The invitation is sent to the invitees' email and once they click on the link to access the document an SMS code is sent to the invitee's mobile phone. The Sender must enter the invitee's mobile phone number during signing process setup. SMS has extra cost, look to our pricing page for SMS pricing.

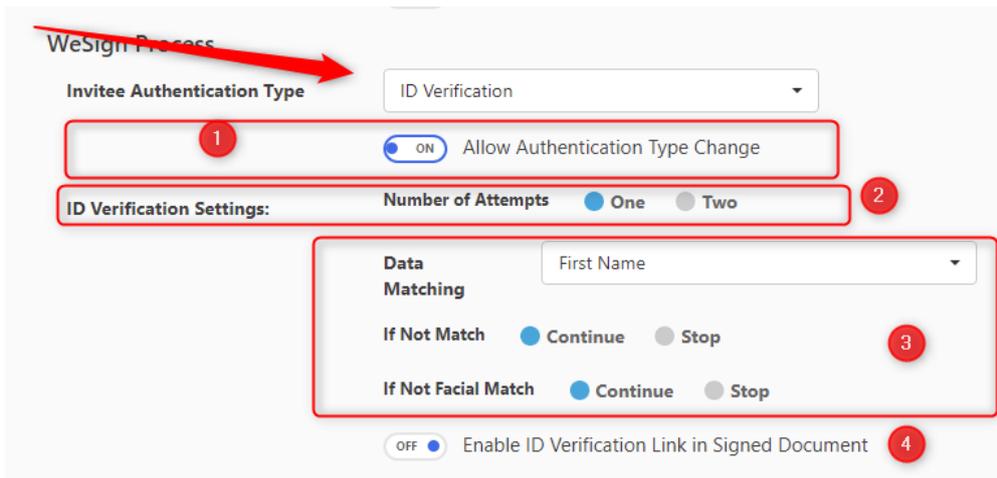
ID Verification

Government-issued identity documents are at the heart of many identity-vetting processes. Performing up to 50 different text- and image-based tests and checking IDs against a database of nearly 4,100 ID types from nearly 200 countries.

The Facial matching software performs powerful biometric facial recognition match and liveness detection to prevent identity theft and fraud. A user simply captures an image of their government issued ID and then takes a selfie. The selfie image is compared to an extracted photo from the identity document such as a driver's license or passport to verify a match and provide a confidence score. NIST tested algorithm for biometric facial recognition match with optional advanced passive liveness test which requires no action and is iBeta compliant. Prevents presentation attacks from printed images, masks, recorded video or synthetic video.

Setting

Setting in My Account -> My Setting

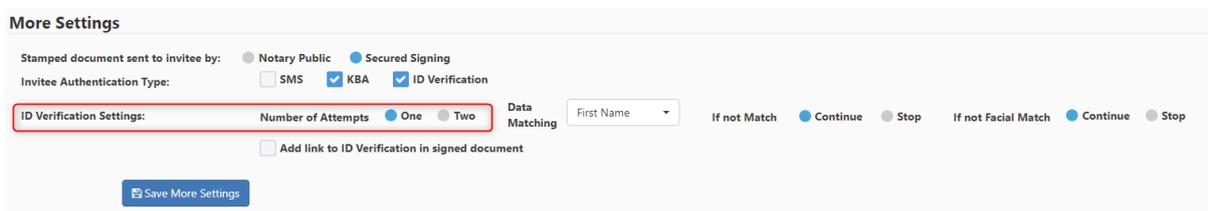


Part 1

In case allow on the fly base don signing process to change authentication type.

Part 2

ID Verification Number of Attempts



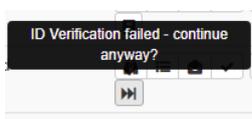
Signer / client need to capture / scan good quality picture of Government ID, sometimes the image is **not meeting the standard to analysis due to cut image’s edges or finger blocking some of the ID data.**

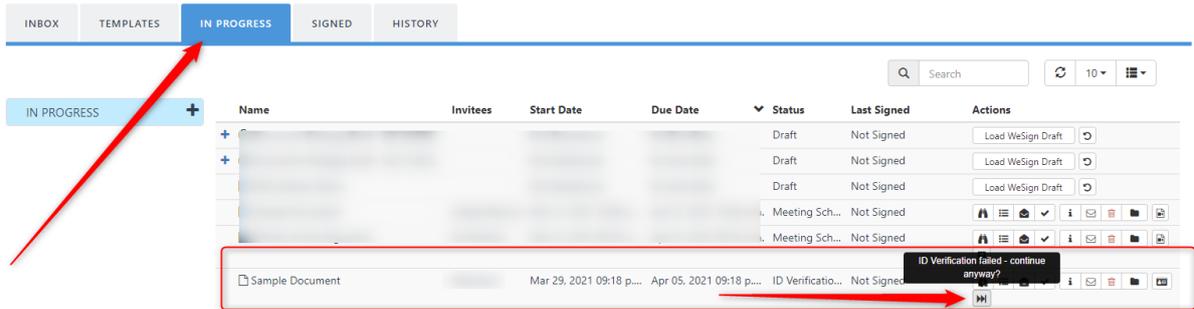
The default is one attempt however it will be best to allow 2 attempts for each signer, keep in mind 2nd attempt if used it will have extra cost for ID Verification.

To access 2nd attempt signer will have a button in same page notification ID Verification failed Try Again Button

In case both attempts failed in ID Verification signer / client can’t access RON / Video Signing / signing process, however we enable sender to control this process manually and allow signer / client to access RON / Video Signing / Signing process.

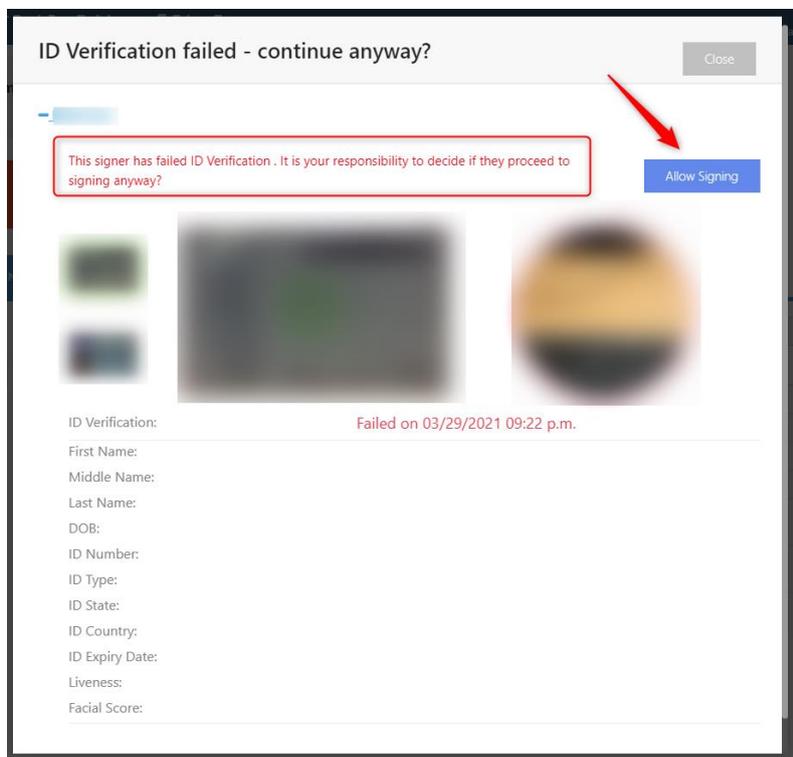
Go to In Progress Tab -> find the document -> Click in THE Icon





You will see the list of clients who failed ID Verification, click on the names you want them to allow signing and press allow signing button.

This signer has failed ID Verification. It is your responsibility to decide if they proceed to signing anyway?



Signer needs to click on the link in the email invitation to access signing process even failed ID Verification once the process above used.

Part 3

Secured Signing enhances this ID Verification process by creating a strong link between the ID and the document. You can configure the matching process so that some data must be part of the ID presented in the ID Verification process and select which parameter you want to match with the ID.

WeSign Process

Invitee Authentication Type: ID Verification

ID Verification Setting: Matching: First Name

If Not Match: Continue Stop

If Not Facial Match: Continue Stop

OFF Enable ID Verification Link in Signed Document

You can also decide if you want to continue the signing process if the data doesn't match or stop the process. In either case the sender receives an email notifying them about the mismatch. This same process applies to the Facial match, if the face of the signer doesn't match the picture on the ID, or the selfie picture quality is poor. Signing process can stop or continue, sender will get email notification in unmatched case. A good score for Facial matching is about 80 points.

WeSign Process

Invitee Authentication Type: ID Verification

ID Verification Setting: Matching: First Name

If Not Match: Continue Stop

If Not Facial Match: Continue Stop

OFF Enable ID Verification Link in Signed Document

A link to ID Verification results can be embedded on the signed document to build trust and everybody can be sure the signer's identity was checked and matches the provided ID.

This process can be set up on the fly per signing process in the Invitation workflow popup

Invitation Workflow

Due Date: Nov 1, 2020 9:02 am

Signing Order Type: Sequential

Video Signing: Enable

Check Invitees

LORRAIN ADORNATO Edit Invitation Email

Authentication: ID Verification

Matching: First Name

If not Match: Continue Stop

Add link to ID Verification in signed document

Video Confirmation Face2Face Sign

Cancel Send

Part 4

Add a page to signed / notarized document with a link to access video recording and Video ID

Knowledge Base Authentication – KBA

Please note: available for Secured Signing accounts and only for US citizens

Knowledge-based authentication, commonly referred to as **KBA**, is a method of authentication which seeks to prove the identity of someone accessing a service. As the name suggests, KBA requires the knowledge of private information of the individual to prove that the person providing the identity information is the owner of the identity. *Dynamic KBA*, which is based on questions generated from a wider base of personal information.

Identity proofing is the means by which the principal (signer of a document) affirms their identity. This is done through a third party who uses dynamic knowledge-based authentication (KBA). KBA is a process in which the principal is asked a series of questions about the principal's identity and personal history. In order to pass, the principal must answer at least 80% of the questions correctly. If the principal fails their first attempt, they may retake the quiz once within 24 hours. If the principal fails a second attempt, they are prohibited from retrying with the same notary for at least 24 hours.

Remote Certificate Sign

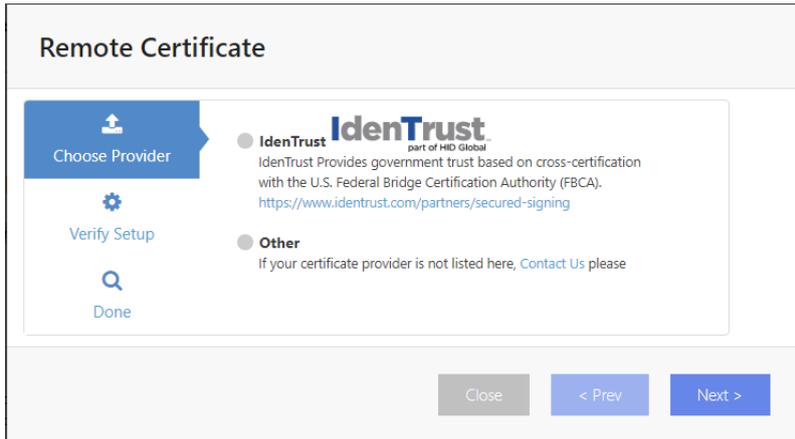
Find it in My account > My Settings -> Remote Certificate

Secured Signing Digital Signature Solutions is based on X509 PKI Digital Certificate, Secured Signing's CA is issuing signing keys to signer. However, if you have your own certificate you can set up secured signing process to use your own certificate, you always sign last in the signing order. At this stage we are supporting IdenTrust certificate. Please contact us to support your certificate.

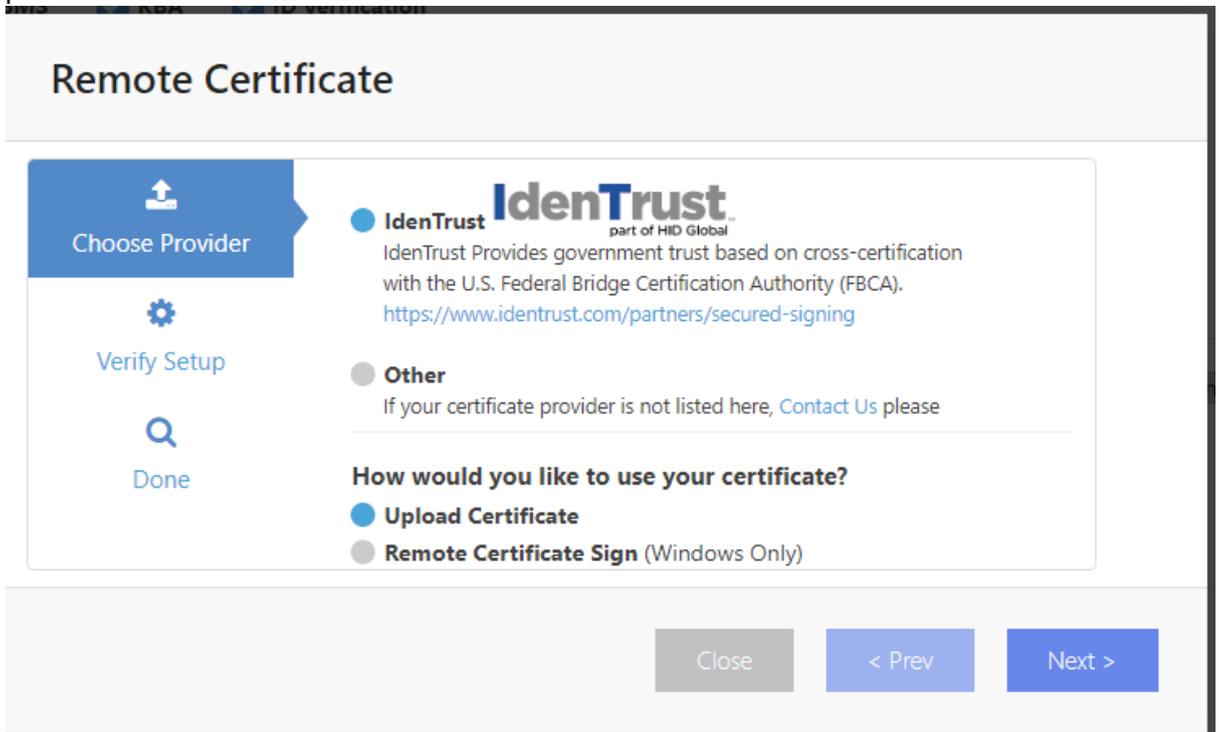
Secured Signing supports 2 methods upload encrypted certificate to secured signing for your signing process use , or download Remote Certificate Sign apps to be installed on your Windows desktop, in signing process Secured Signing platform will access on premises certificate, hardware or software to sign the document using your own certificate.

More info about IdenTrust Certificate and secured signing at <https://www.identrust.com/partners/secured-signing>

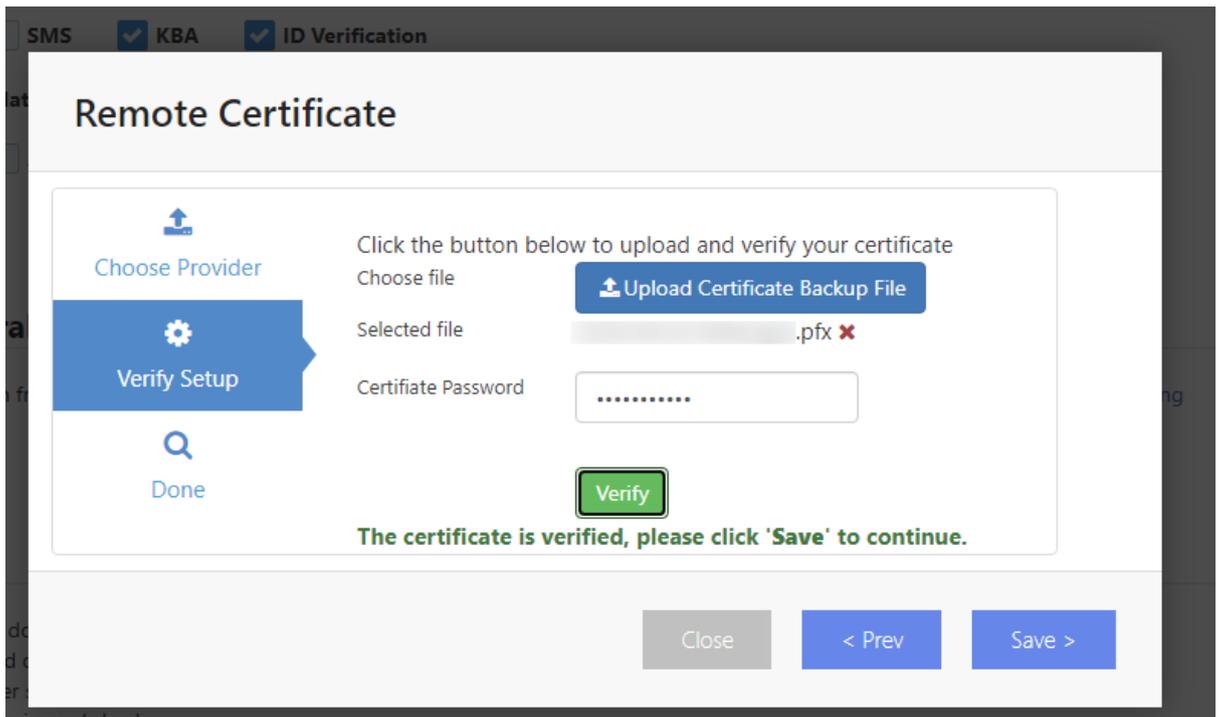
Click Set up Certificate to do the setup for remote certificate



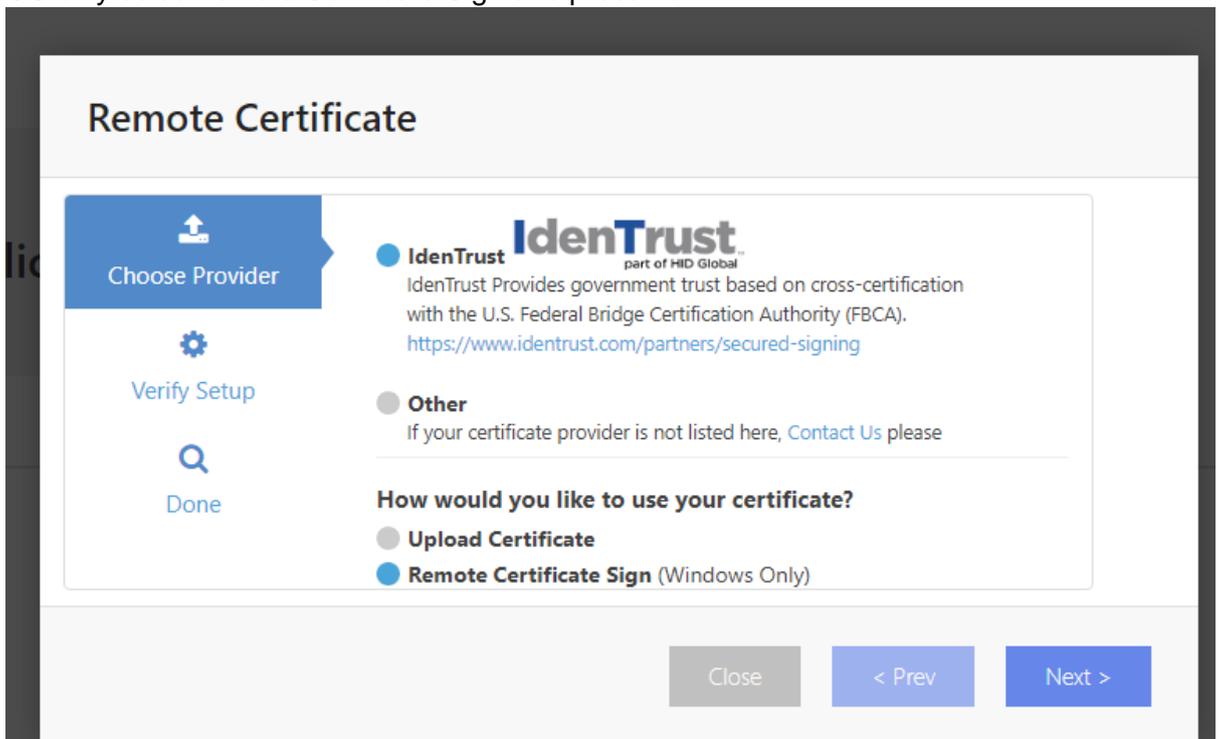
1. Select the certificate provider and the way you want to use your certificate. You can upload it to Secured Signing or install app in your Windows workstation to use on premises certificate.



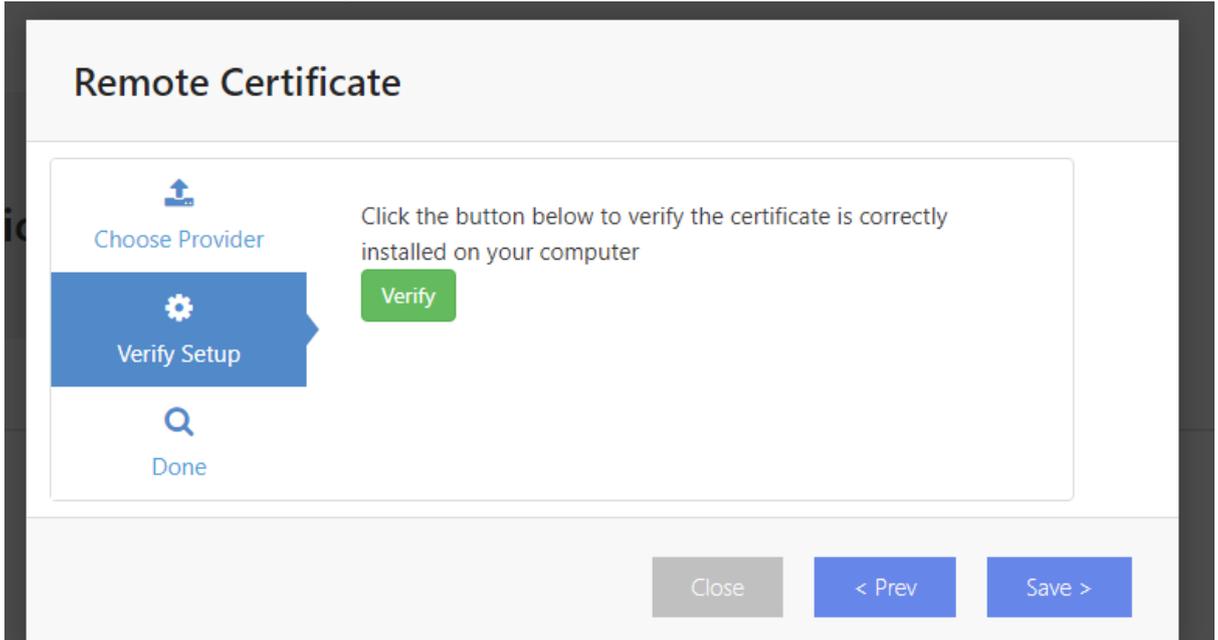
2. **Upload Certificate** process – The backup file you created during installing the certificate in your desktop browser. You need to use your password in order to access the file and then press verify, (please be sure you uploading the certificate for signing not for encryption), once verified press save and you are ready to use it in the signing process. every time Notary will notarize or sign document we will use this certificate to preform X509 Digital Signature.



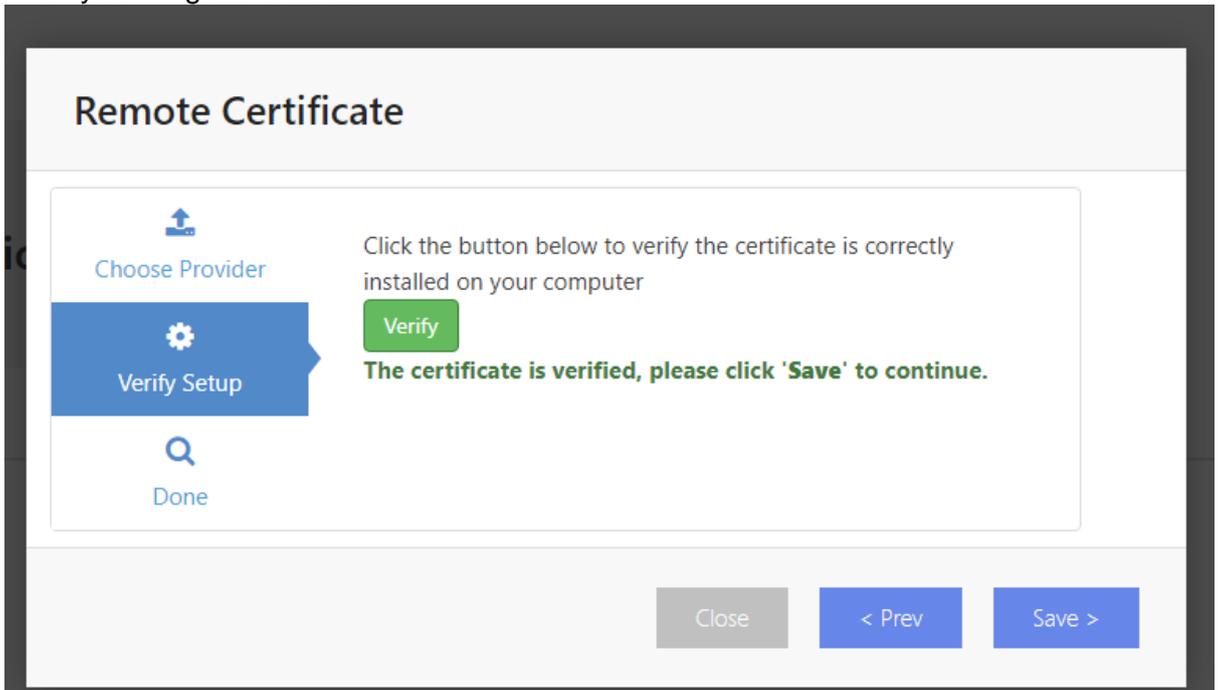
3. Upload certificate Process – In case you have a USB token / Hardware to store your certificate or you want to keep the certificate on your premises / Desktop windows OS only select remote Certificate Sign and press next



4. Click verify to select the right certificate in your PC , enter the certificate password



5. Then you will get this screen



6. Once save you will need to download and install Secured Signing Remote Certificate Sign App in your PC, click download to do it now, you can also do it later, or on first time you need to sign .

Once

Remote Certificate



Choose Provider



Verify Setup



Done

Click the button below to download **Secured Signing Remote Certificate Sign** App

[Download](#)

Follow the instruction infomaintion to instaiill and setup the application on your computer (Windows desktop only). Please be aware to intall the Remote Certificate Sign app, it may take some times, based on your PC performance.

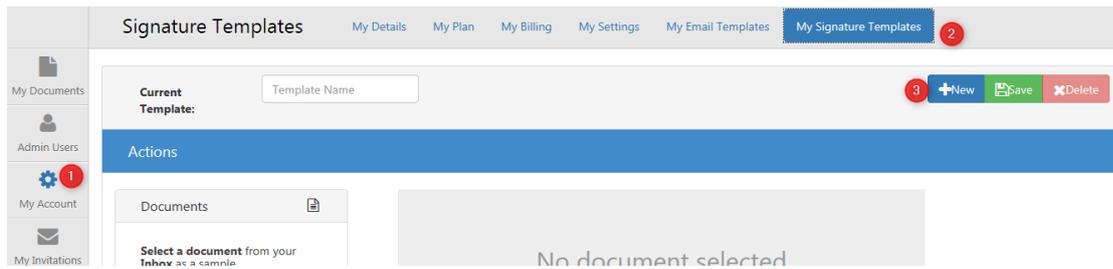
[Close](#) [Done](#)

Signature layout Template

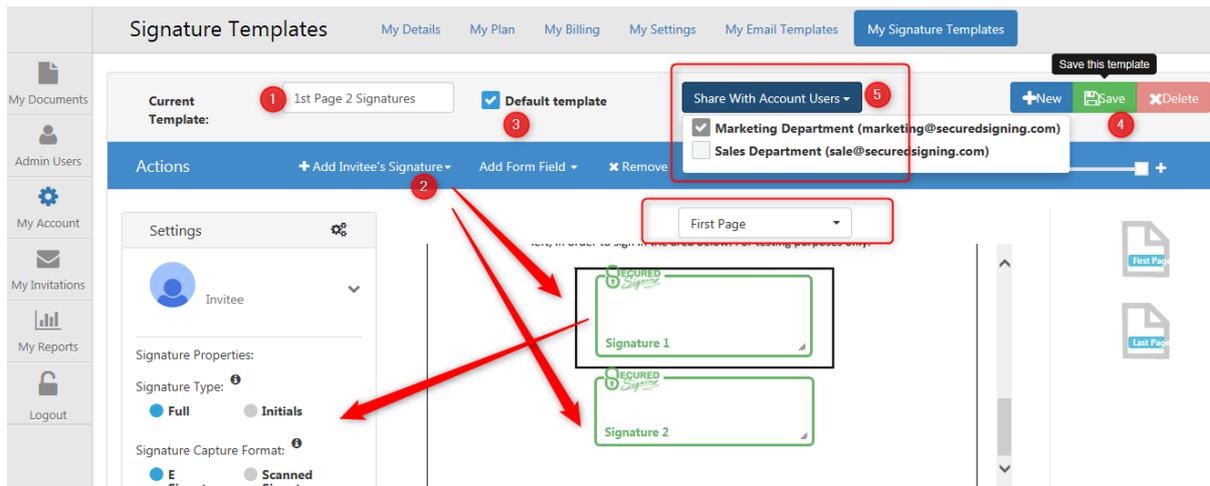
Automate your signing process and prepare your documents faster and easier to capture signatures. With our new Signature Template feature you can create a template for re-use where the signature position and other signature settings are saved as a template. This way you can simply select the template to a document or multiple documents within a package.

With a signature template, you just add the invitee's details and press send. This saves you time on positioning signatures for each document. Signature template is useful for invoice approval or documents with the same layout, or for the same signature position across many documents, such as on the last page at the bottom.

To enable Signature templates, first you need to design your signature template before it can be applied. To do this, login to your Secured Signing account and go to My Account -> My Signature Templates



How to design



How to build your Signature Template:

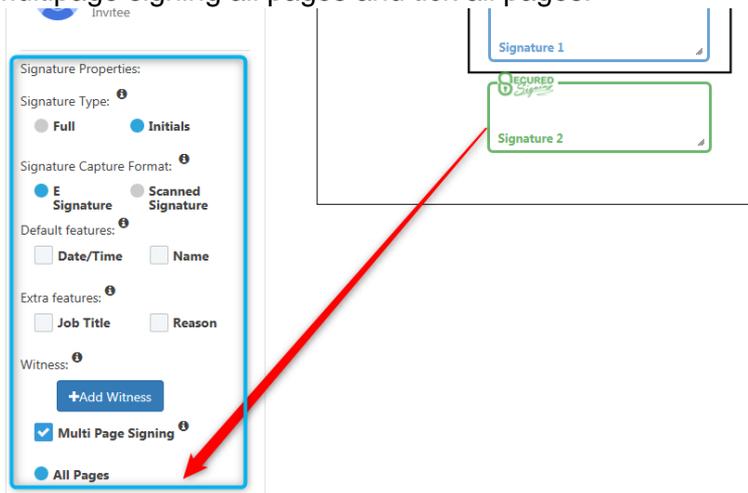
Select a document from your inbox.

1. Give your template a name and select the page you want to add a signature, first page for example
2. Add a signature and set the signature properties on the left. If require you can add witness at this stage.
3. Tick to set this template as a default
4. Click Save
5. You can also share the template with other users in your account. Don't forget to click save

Important Signature Template rules:

- When choosing signature position on first page, your documents should have at least one page. When selecting first and last page signature position, your documents should have at least two pages
- If selecting the Signature position in a specific page, for example on page 2 and page 4, all documents should have at least 4 pages, or on 1st page, page 2, and 4 and last page, all documents should have at least 5 pages.

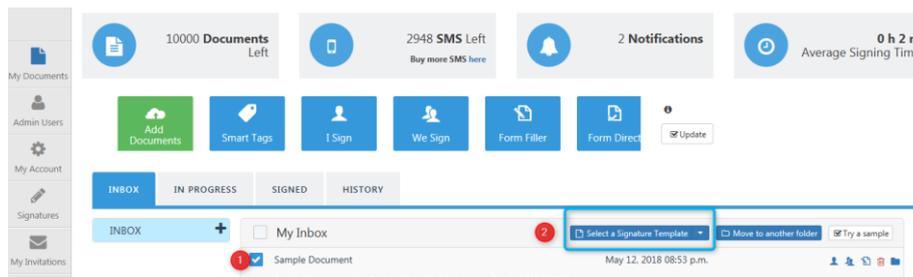
- If Signature position should appear in all pages regardless, you need to select multipage signing all pages and tick all pages.



How does it work?

For We Sign – One Document

Start by ticking the document you want to sign (1) and select a Signature template (2)



Invitation Workflow

Due Date [?]

Signing Order Type [?] Sequential

Check Invitees

<input type="text" value="Email"/> This field is required.	<input type="text" value="First Name"/> This field is required.	<input type="text" value="Last Name"/> This field is required.
<input type="checkbox"/> Video Confirmation [?]		

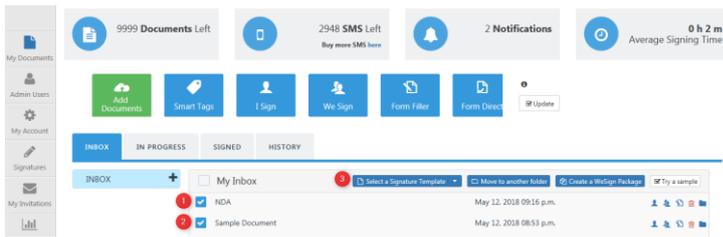
[Edit Invitation Email](#)

<input type="text" value="Email"/> This field is required.	<input type="text" value="First Name"/> This field is required.	<input type="text" value="Last Name"/> This field is required.
<input type="checkbox"/> Video Confirmation [?]		

You will then be prompted to only enter your invitee’s email address and name before pressing send.

For We Sign - Package

Select the document in the package and press select a signature template



Invitation Workflow

Package
 Invitees
 Documents

Signing Order Type [?]

Sequential

Edit Invitation Email

<input type="text" value="Email"/> This field is required.	<input type="text" value="First Name"/> This field is required.	<input type="text" value="Last Name"/> This field is required.
--	---	--

Video Confirmation [?]

Edit Invitation Email

<input type="text" value="Email"/> This field is required.	<input type="text" value="First Name"/> This field is required.	<input type="text" value="Last Name"/> This field is required.
--	---	--

You will then be prompted to only enter your invitee’s email address and name before pressing send.

Invitee Allows Decline

Decline & Continue signing in package

Many signing scenarios require a decline of one or more documents within a package, however you want to continue to sign other documents in the same package.

Once a document has been declined by one of the invitees, the other invitees will be able to view the document in the signing process but won’t be able to sign this document anymore. This mean the signing process for this particular document in the package has stopped but all other documents in the same package can still be signed..

How to set this up?

Login to your Secured Signing account and go to My Account -> My Setting -> under We Sign Section. Enable Invitee Allows to Decline and tick continue in package signing process. Don’t forget to press update my settings at the top of the page.



Invitee will be prompted to provide a decline reason and the document owner will be notified of this by email.

We've also added a decline stamp which includes who declined the document, why and date and time.



Decline email notification

The default settings for a declined process is that the document owner will receive an email notification that a document has been declined. However, you might want to notify all invitees as well. To do so login to your Secured Signing Account -> My Account -> My Setting -> We sign section -> Enable invitee allows decline and set email notification as needed.

The document owner always will receive email notification about the document that has been declined and by which invitee. However, if you enable Invitees to On, all other invitees will also receive an email notification that the document has been declined and by which invitee.

Domain Authentication

Recent changes within the email industry standards require your approval for others to send emails on your behalf, this is known as domain authentication. We recommend you set up your own DKIM and SPF authentication. This way, Secured Signing will be permitted to display your domain's information in your email (invitations and reminders) header. You can authenticate your domain by simply going to Domain Authentication Tab under My Settings.

By doing this you will benefit from improved delivery of your emails. You are less likely to experience issues such as emails with spoofing message or your emails landing in junk mail folders.

My Settings – Domain Authentication - Press Add Domain

My Settings My Details My Plan My Billing **My Settings** My Email Templates

My Settings Signature Settings Branding Api Settings Notification **Domain Authentication**

Add Domain

To improve email delivery, we recommend you set up your own DKIM and SPF authentication. This way, Secured Signing will be permitted to display your domain's information in your email (invitations and reminders) header, which can help improve your delivery rates and make your emails look more professional.

digitalsignature. [verified]

Authenticate digitalsignature. with Secured Signing by modifying your domain's DNS records. These changes allow your emails (invitations and reminders) to appear to come from digitalsignature., instead of from our servers. After you've made the required DNS changes, please wait 24-48 hours for the changes to propagate.

DKIM: Create a CNAME record for sslkey_domainkey.digitalsignature. with this value:

sslkey.dkim.securedsigning.com

SPF: Create a TXT record for digitalsignature.co.nz with this value:

v=spf1 include:spf.securedsigning.com -all

Disable Authentication **Verify DNS Records** Remove Domain

Authenticate your domain with Secured Signing by modifying your domain's DNS records. A list of domains that are part of your users account will show. Enter changes in your domain DNS records.

After you've made the required DNS changes, please wait 24-48 hours for the changes to propagate.

DKIM: Create a CNAME record for sslkey_domainkey.your_domain with this value:

sslkey.dkim.securedsigning.com

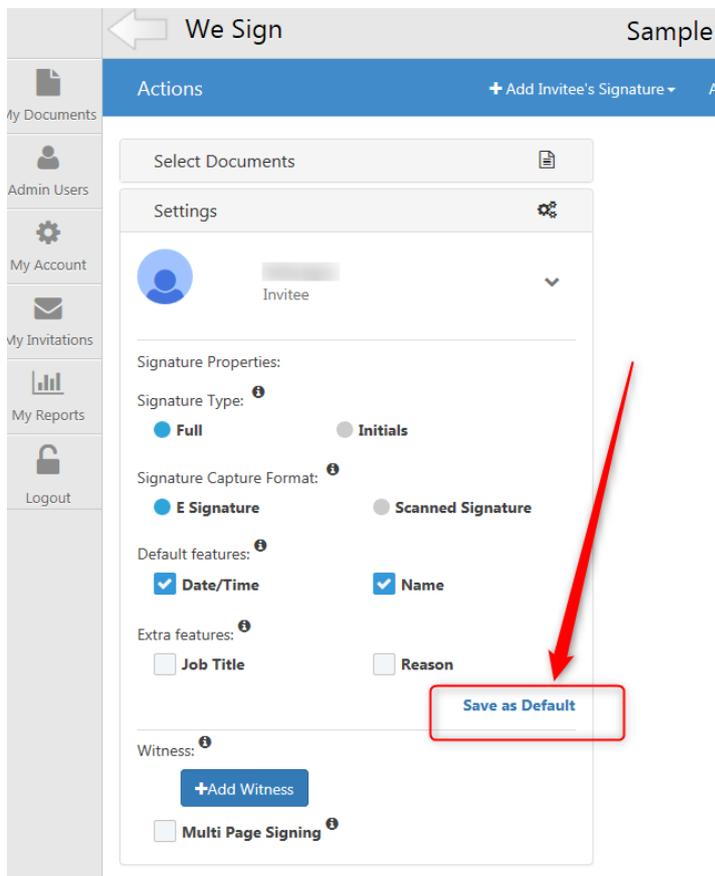
SPF: Create a TXT record for your domain with this value: `v=spf1`

`include:spf.securedsigning.com -all`

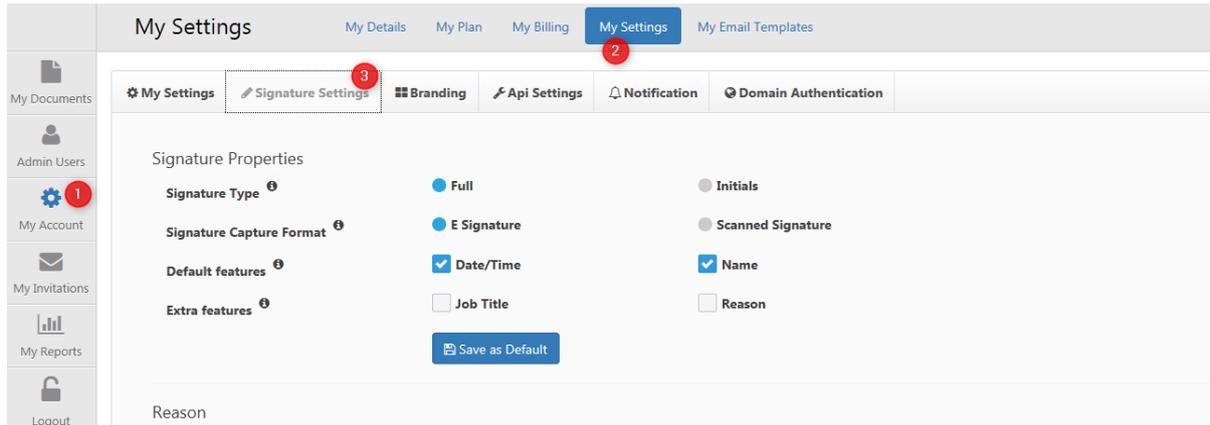
When completed, verify the domain and you email invitation delivery will improve.

Signature Setting

Setup signature properties within the We Sign process.



Or from My Account -> My Setting -> Signature Setting

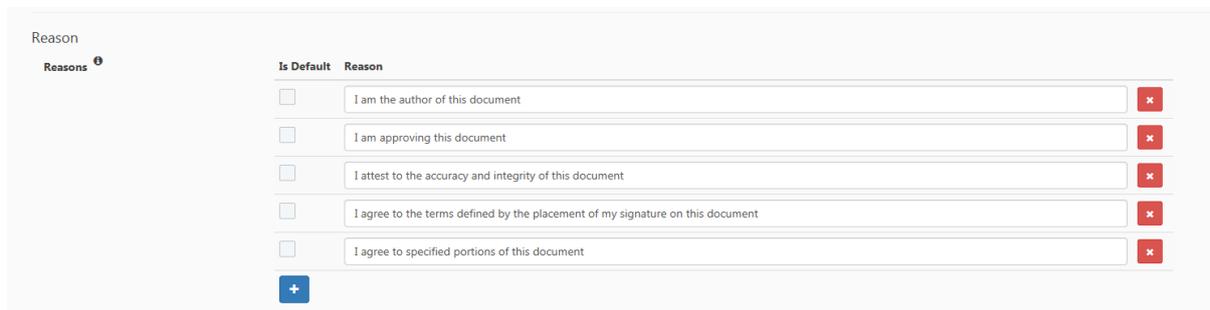


Once saved as default, all new WeSign process signature will have the same setting. Setup the Secured Signing platform to meet your signing needs.

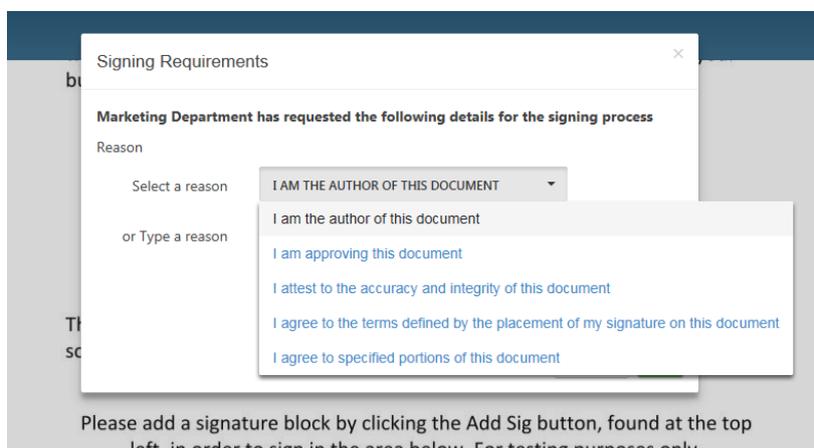
Reason

In case invitee needs to enter the signing reason, they can select from a list or enter their own.

Build your customised list of reasons using this setup screen.

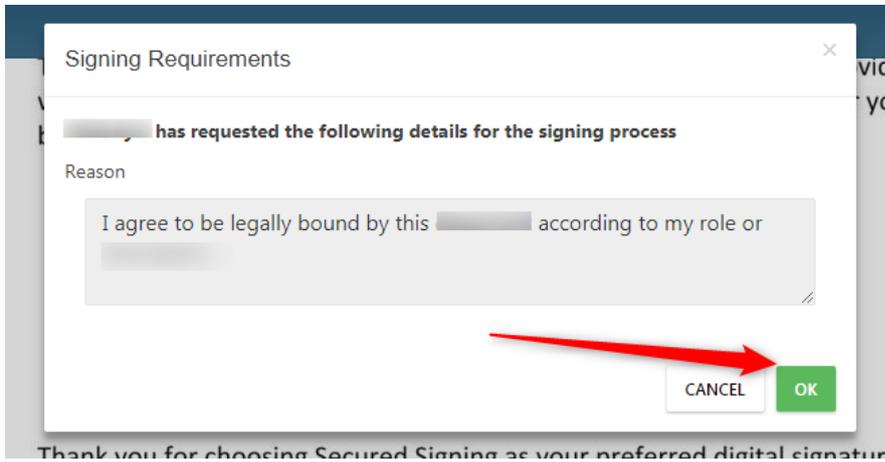


Invitee will see this during the signing process



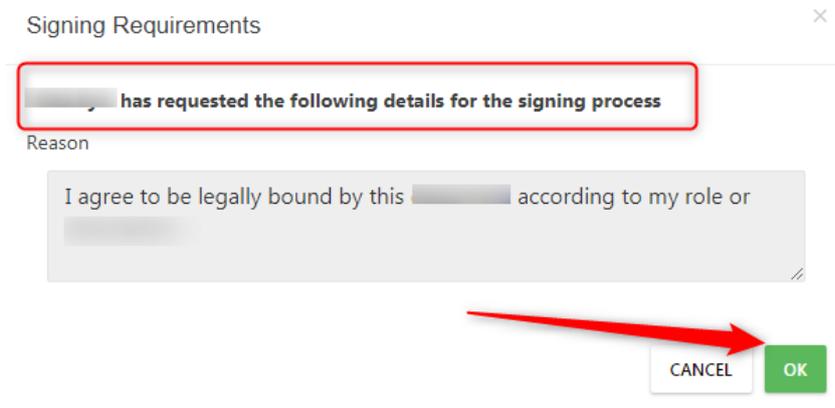
If “is default” selected (ticked) only this reason will appear for invitee to press OK in order to sign.

Invitee will see this popup while signing. Press ok in order to sign



Pop-Up Type

You can configure how the 'reason for signing' pop-up is displayed. You can select what text will be shown, select from option A or option B.

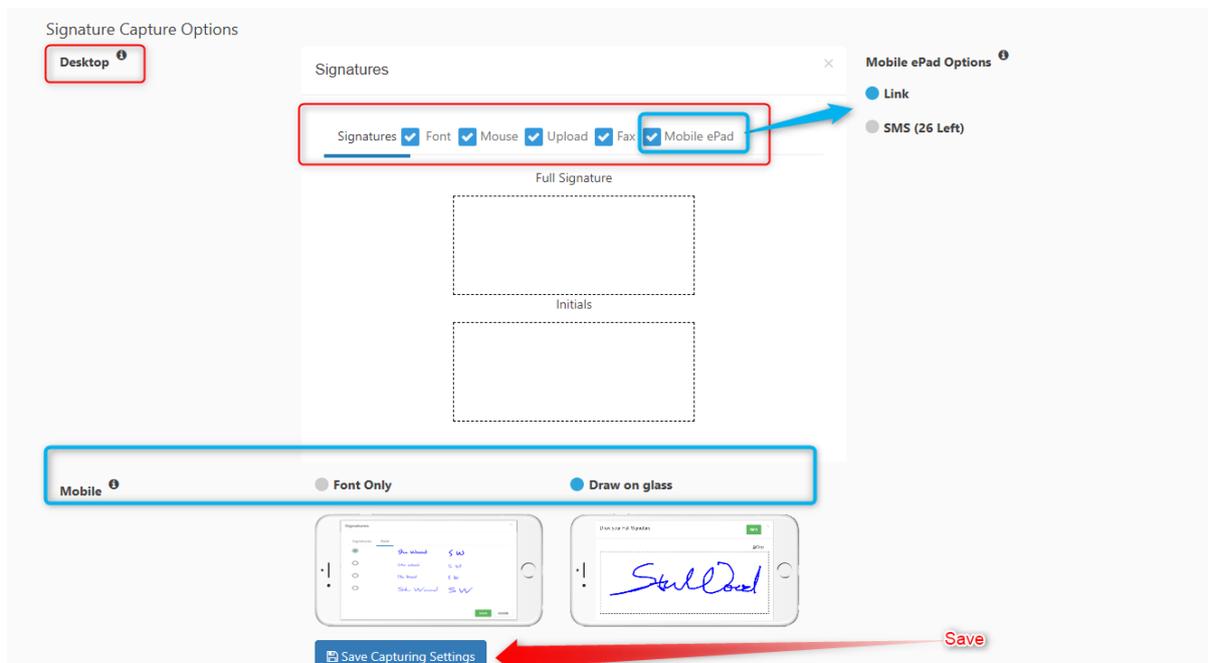


Signature Capture

Signature capturing method setup

Secured Signing supports several options to capture your graphical signatures in desktop and mobile, you can choose from the following options:

- Font – Signer’s names in predefine handwritten font
- PC Mouse – Draw Signatures with the mouse.
- Upload images – Upload graphical signatures images
- FAX – Print the Fax form, signed, and Fax it to Secured Signing system, signature images will extract form the fax form and attached to Signer’s profile.
- Mobile ePad – Extend desktop signatures capturing with your mobile phone, use the smart phone as an ePad.



For desktop signature capturing, you can decide what type of capturing options are available to you and your invitees. Tick the relevant capturing method and save your selection.

When capturing signature on mobile, the default is to draw on the glass, it will appear for invitee to draw signature with his finger.

However, some account owners prefer a predefined font capture option, select as shown in the image above.

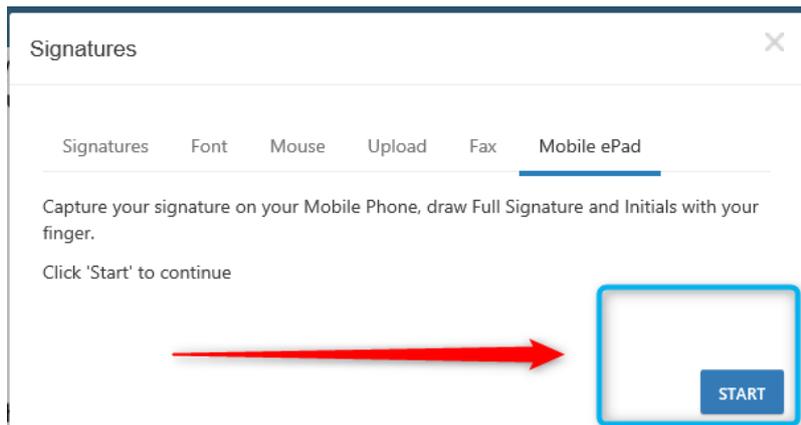
Mobile users can also click on My Signatures, from the left-hand menu. When they select this, they will view the same capture options as available to desktop users.

Mobile ePad

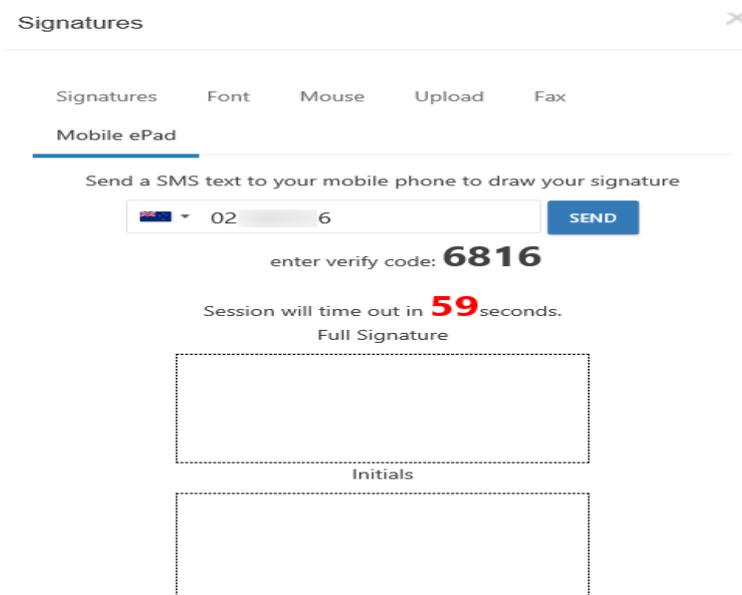
If you prefer to use a desktop but you want to draw your signature with your finger, same as a wet signature you can with our Mobile ePad capability. Use Mobile ePad to draw your signature on your mobile phone, and it will add these images to your Secured Signing process activated from a desktop.

How to use Mobile ePad?

Prese Start, based on the account setup the link can be sent by SMS, or user enter the link in the mobile's phone browser.



Enter your Mobile Number. Note: ensure you select the right country code



With SMS:

With a link:

Entre the link in the mobile's phone browser.

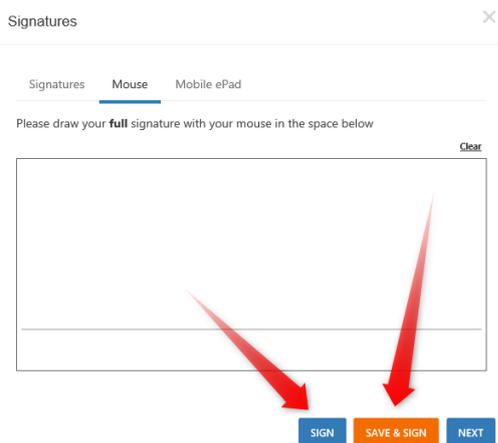


In both options you will be asked to enter a code to initiate the mobile ePad functionality. Follow the instructions as prompted.

Choose if you want to Save your signature image or not?

The Signer has the freedom to choose from:

- Sign without saving their graphical signature images, next time they sign, will be required to capture signature image again.
- Save and Sign, means the graphical signature image will be saved in Secured Signing. You won't need to capture your signature again. Of course, you can delete your signature at any time by click My Signature -> delete signature.



Admin User

For Secured Signing Business plan, the admin user can add more users to the account themselves. For Enterprise Accounts, you can manage accounts and users at the Admin Portal.

My Users – Users

Admin user is able to view and monitor the documents of all users within the account.

The screenshot shows the 'My Users' page in the Secured Signing interface. The page has a sidebar on the left with navigation options: My Documents, Admin Users (with a notification badge), My Account, My Invitations, My Reports, and Logout. The main content area is titled 'My Users' and contains a sub-header with 'USERS' (9), 'INVITEES', and 'WITNESSES'. Below this is an 'Add New User' button, a search box for invitees, and a search box for users. A table lists the following users:

Full Name	Email Address	Company Name	Job Title	Last Login Time	User Type	Edit	Delete
Sales Department	sale@securedsigning.com	Secured Signing	Sale Manager	Feb 19, 2018 11:22	User	Edit	Delete
Marketing Department	marketing@securedsigning.com	Secured Signing	Marketing	Feb 19, 2018 11:30	Admin	Edit	

At the bottom of the table, there is a 'Show rows: 10' dropdown menu.

Account 's Admin User can add more users based on the account plan, you can have more than one Admin User per account.

My Users – Invitees

This screen allows you to monitor all invitees for all users within your account. You can also view document log for each invitees' documents.

Invited By	Invitee Name	Email Address	Last Login Time
Marketing Department	Stu Wood	info@securedsigning.com	Feb 19, 2018 12:12

Doc Name	Last Signed Date	Status	Log
NDA	Yet to Sign	0 of 2 Signed	View Logs

Doc Name	Last Signed Date	Status	Log
NDA	Feb 7, 2018 11:16	Complete	View Logs
NDA	Feb 7, 2018 11:21	Complete	View Logs

My Users – Witness

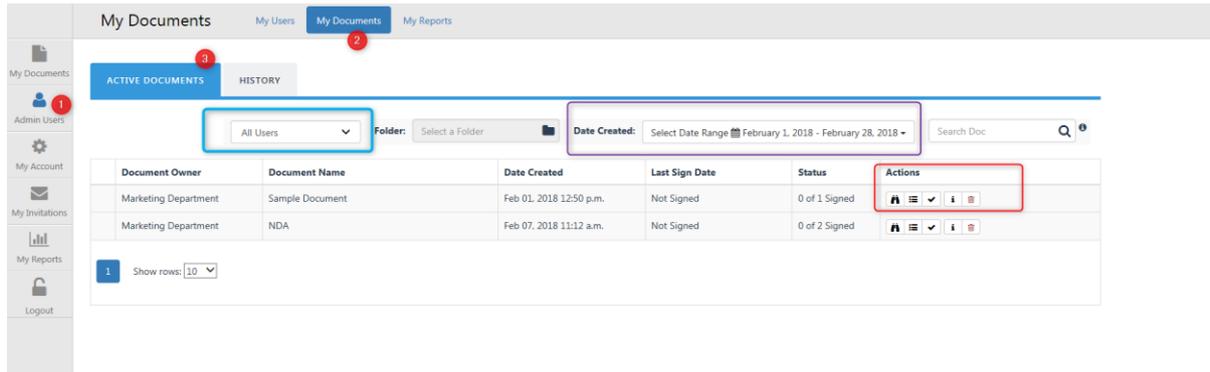
View all users Witness process.

Witness Name	Email Address	Last Login Time	Invited By
Sales Department	sale@securedsigning.com	Feb 19, 2018 11:22	Stu Wood

Doc Name	Doc Owner	Last Signed Date	Status	Log
Sample Document	Marketing Department	Feb 19, 2018 12:29	1 of 2 Signed	View Logs

My Document – Active Documents

Admin user can monitor the signing process for all users within the account. This includes all active documents, documents In Progress and Signed documents folders.



Actions available are:

- View the current active document
- View document log
- Verify signature
- Document Status
 - Send Manual reminder
 - Update invitee details
 - Extend Signing due date
- Delete document

My Reports

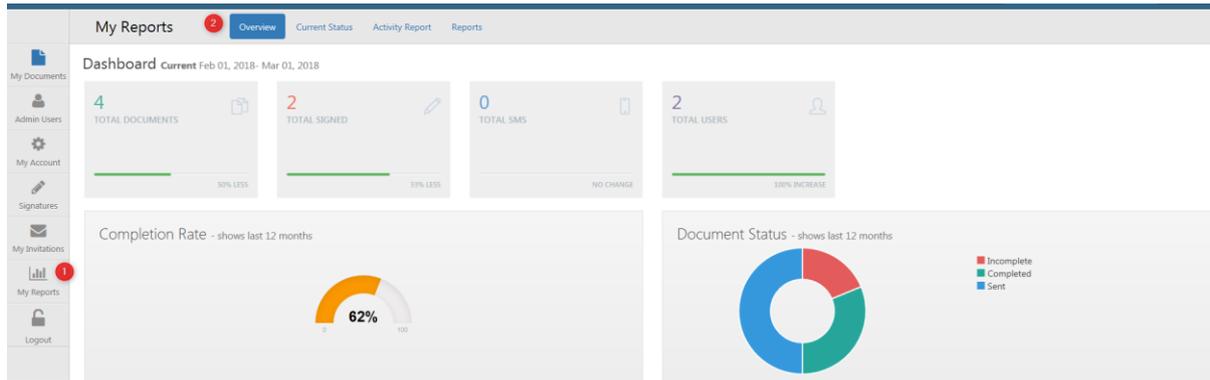
Admin user can run reports about all users within the account.

Standard user reports are for the documents and activities that belong to that user only.

Overview – Dashboard

Global view in terms of:

- Total Documents
- Total document signed
- Total SMS sent
- Total Users in the account (available for admin user only)
- Completion rate and success rate of signed document
- Document Status, number of documents sent, number of documents signed, completed, and number of pending documents incomplete.
- Document volume in last 12 month.
- Completion time in last 12-month, time to complete signing process



Current Activities

Snapshot of current number of documents in each signing stage, inbox, in progress and signed tabs

Full Name	Email Address	Company Name	Inbox	In Progress	Signed
Sales Department	sale@securedsigning.com	Secured Signing	0	0	0
Marketing Department	marketing@securedsigning.com	Secured Signing	10	2	0

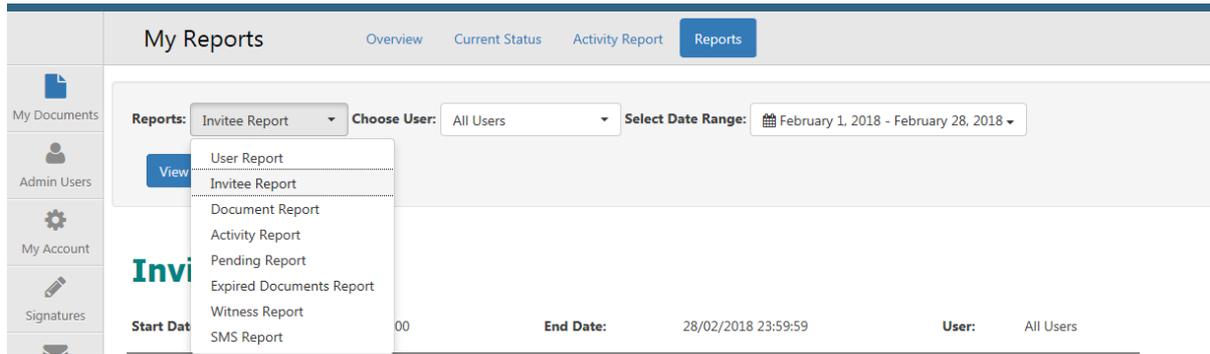
Activities report

Filter this report by date to get a quick summary of the number of documents in each signing process, uploaded, form filler, form direct, deleted, in progress and signed.

Full Name	Email Address	Company Name	Uploaded	Form Filler	Form Direct	Deleted	In Progress	Signed
Sales Department	sale@securedsigning.com	Secured Signing	0	0	0	0	0	0
Marketing Department	marketing@securedsigning.com	Secured Signing	10	0	0	0	1	2

Reports

Run reports per user or for all users (available to admin user only), export to Excel or PDF.

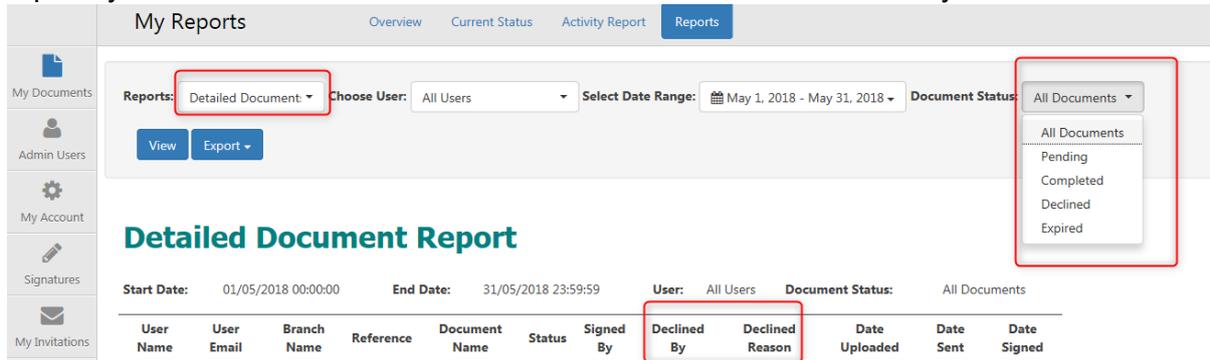


Reports available are:

- Users report
- Invitee report
- Document report
- Activities report
- Expired Documents report
- Witness report
- SMS report

Detailed document report

Use this new report to get full information on all activity within your Account. You can filter this report by document status. We've also added a new column for decline by and decline reason.

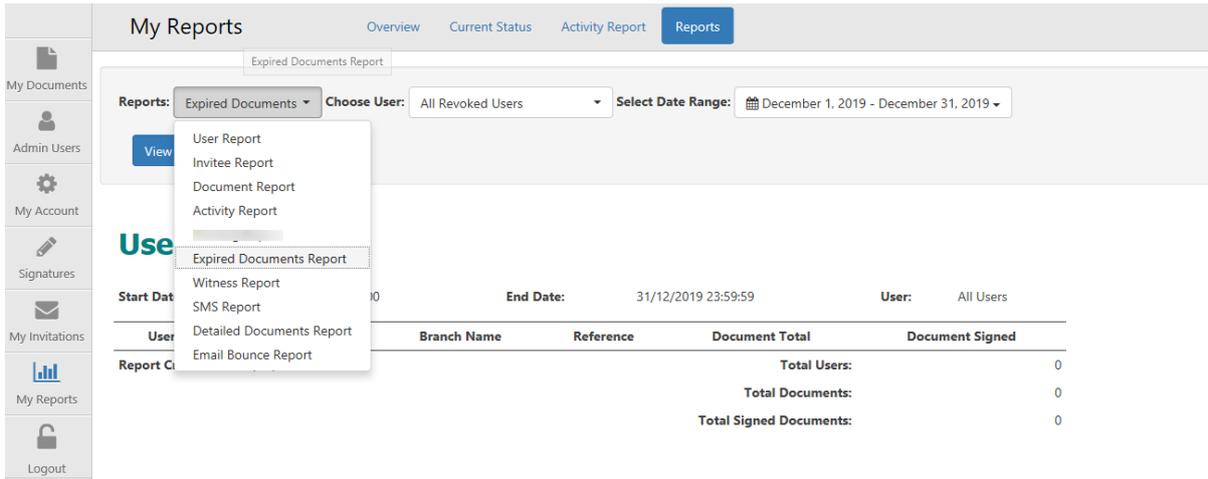


Revoked Users Report

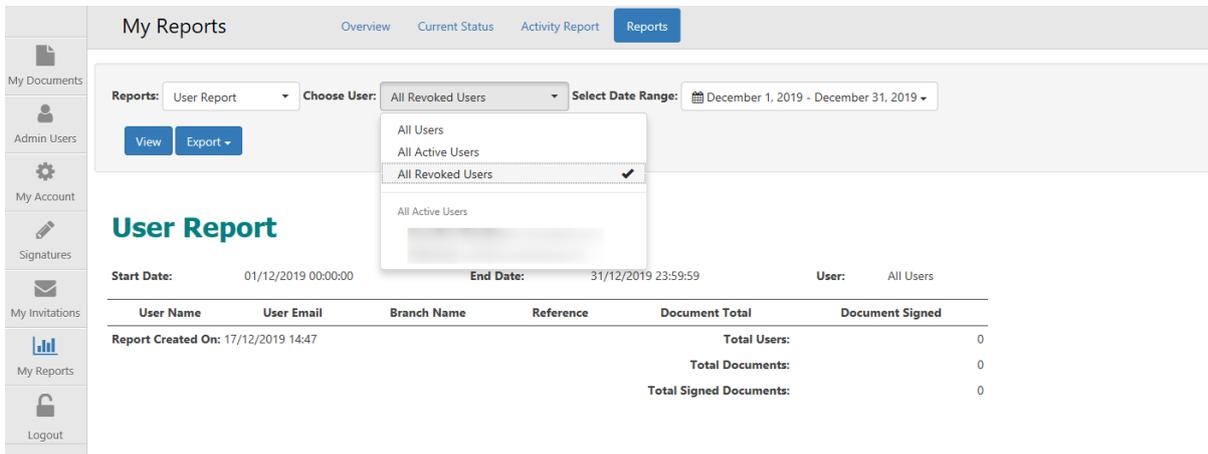
As an admin user you're able to generate and view reports for revoked users from your account, this means you can always be on top of past actions related to these users.

An account can have multiple users, however on deletion of all additional users an account will still be active, with at least one admin user.

The following reports are available for revoked users

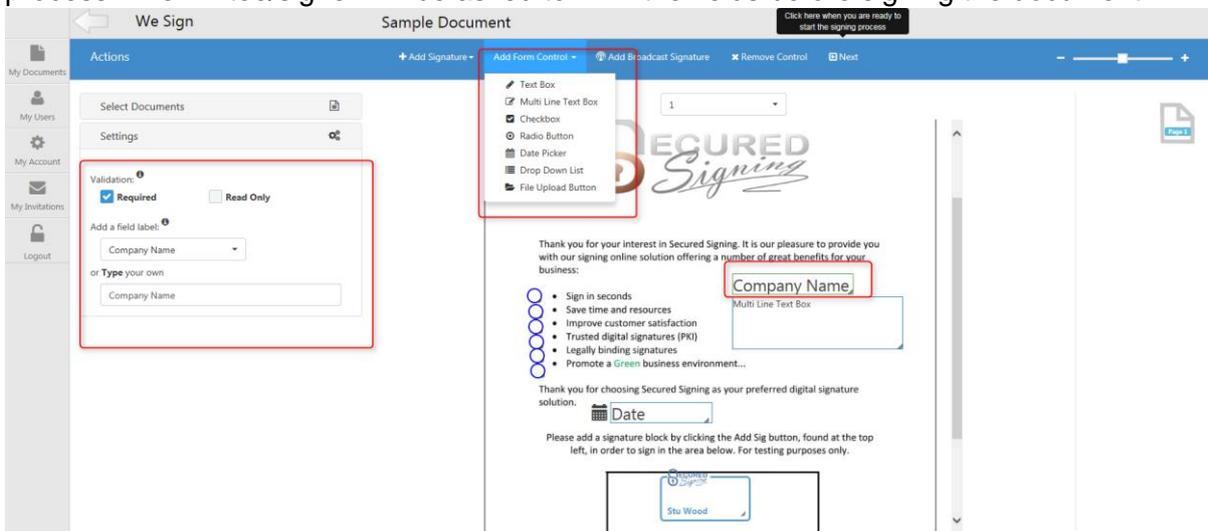


You can generate reports for all revoked users, or specific ones by choosing them from the drop-down menu.



We Sign Form Fields

You can now add Form Fields in the We Sign document preparation process. As the document owner you will be able to add the required form fields during the preparation process. The invitee/signer will be asked to fill in the fields before signing the document.

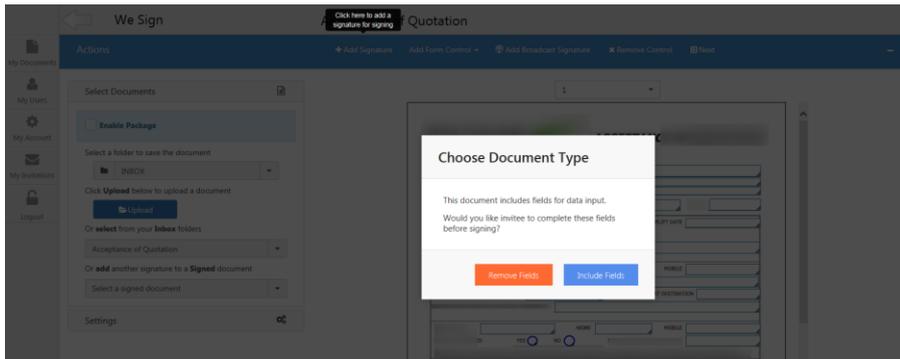


Recognises Form' Fields in PDF Editable document

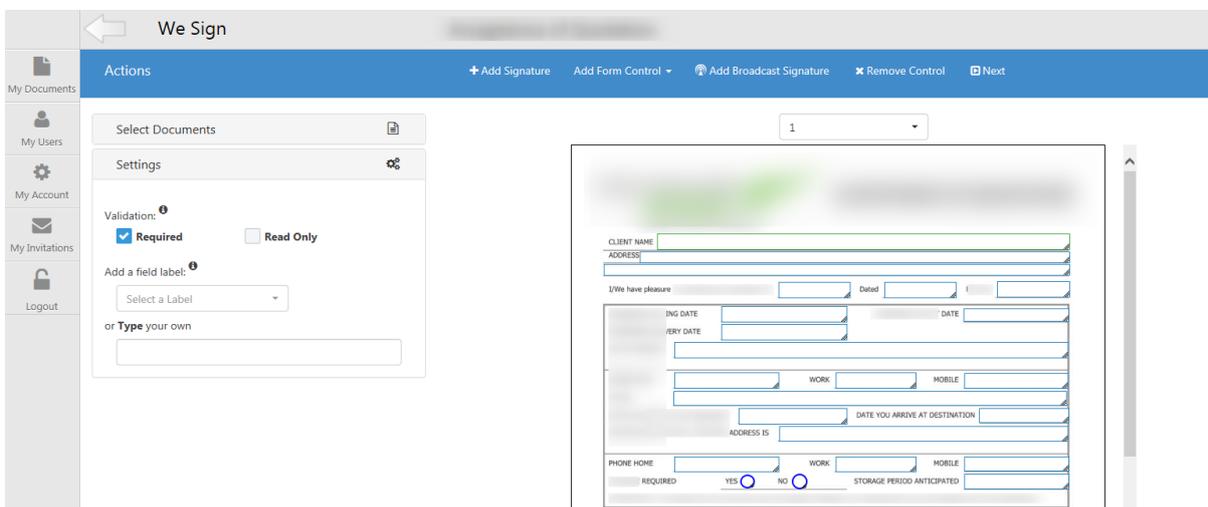
Now you can upload an editable PDF document in the We Sign and Form Filler functions. Secured Signing system will automatically recognise these fields and present them to be completed.

You can adjust field's position and add more fields if required.

First upload the document, then and select if you want to keep the form fields or not.



Then adjust and or add more fields to the document. Then enter the invitee's signature block and press next



Secured Signing recognises the following form fields types:

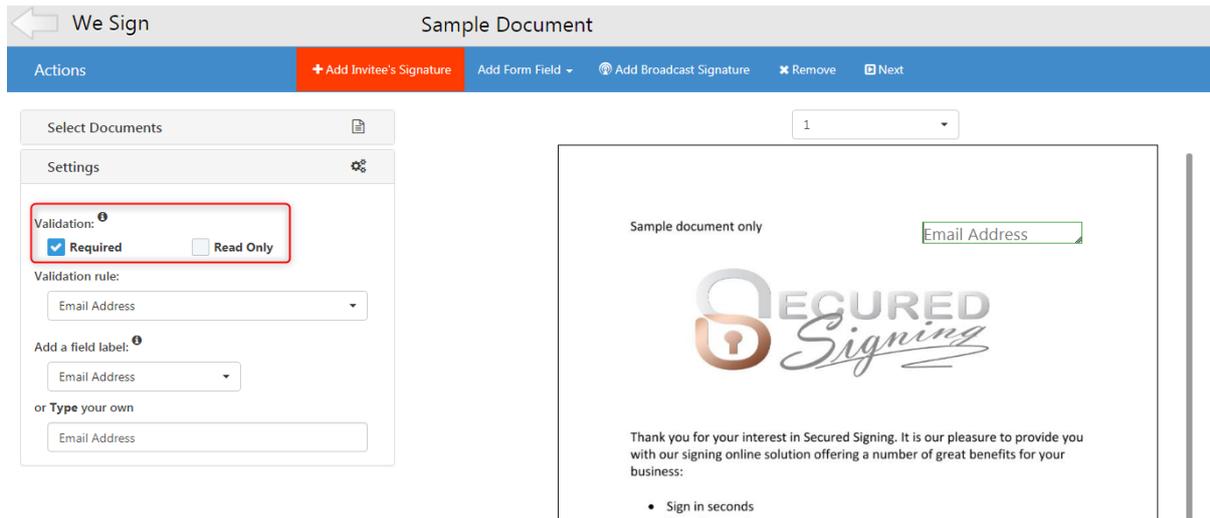
- Text box
- Multi line filed
- Check Box
- Radio Buttons

- Drop down fields with the values
- Date

Form Fields Validation Rules

Add Form fields with business rules validation.

- Required or optional fields to be filled-in by invitee
- Read only – invitee can't edit this field, fill-in by document owner.

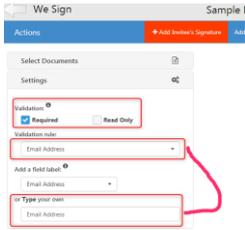


The screenshot shows the 'We Sign' interface for a 'Sample Document'. On the left, the 'Settings' panel is open, showing validation options for a field. The 'Validation' section has 'Required' checked and 'Read Only' unchecked. Below, the 'Validation rule' is set to 'Email Address' and the 'Add a field label' is also 'Email Address'. The main preview area shows a document with the Secured Signing logo and a text box labeled 'Email Address'.

There are more validations rules. Data fill-in must match the rule.

- Email address
- Website address
- Numeric only field
- Characters only field
- NZ Bank account format
- NZ IRD Number
- AUS TFN – Tax Declaration Number
- AUS ABN
- Credit Card number
- Credit Card Expiry Date
- NZ ZIP Code (Postal Code)
- AUS ZIP Code
- UK ZIP Code
- NZ Phone Number
- AUS Phone Number
- Phone Number

In case the field is mandatory invitee must enter the right data to pass the validation before the invitee is able to sign. Also, the field label set as rule validation, you can edit the label



Invitee Name in the Grid

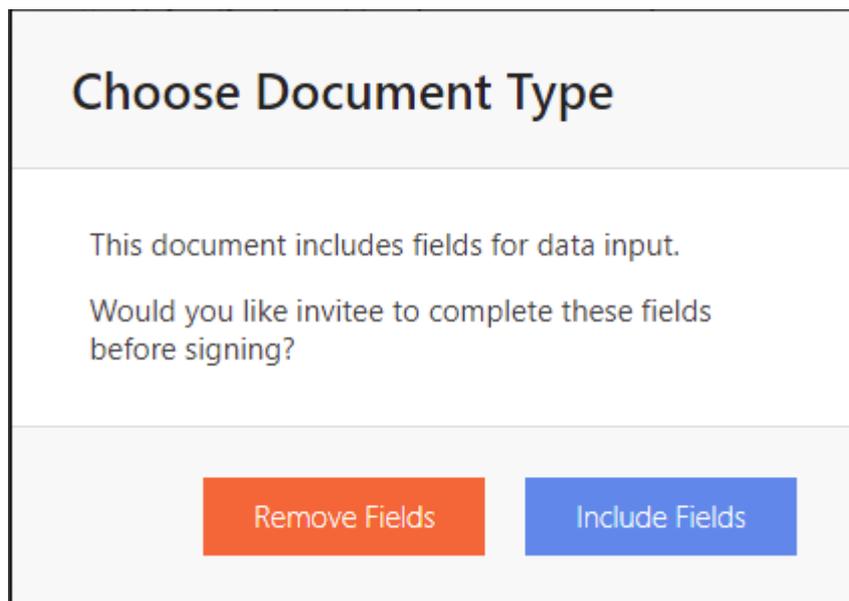
Following customer feedback, we have now added invitee name and email column in IN PROGRESS and SIGNED tabs.

INBOX		IN PROGRESS	SIGNED	HISTORY																																																																						
<div style="float: right;"> <input type="text" value="Search"/> 10 </div>																																																																										
<ul style="list-style-type: none"> IN PROGRESS ABC Company Accounts Client A Client B 		<table border="1"> <thead> <tr> <th>Name</th> <th>Invitees</th> <th>Start Date</th> <th>Due Date</th> <th>Status</th> <th>Last Signed</th> <th>Actions</th> </tr> </thead> <tbody> <tr> <td>[Redacted]</td> <td>Stu Wood</td> <td>Dec 07, 2017 09:59 a...</td> <td>Dec 14, 2017 09:59 a...</td> <td>1 of 2 Signed</td> <td>Dec 07, 2017 10:01 a...</td> <td>[Icons]</td> </tr> <tr> <td>[Redacted]</td> <td>Stu Wood</td> <td>Dec 07, 2017 09:31 a...</td> <td>Dec 14, 2017 09:31 a...</td> <td>1 of 2 Signed</td> <td>Dec 07, 2017 09:33 a...</td> <td>[Icons]</td> </tr> <tr> <td>[Redacted]</td> <td>Stu Wood</td> <td>Dec 07, 2017 08:32 a...</td> <td>Dec 14, 2017 08:31 a...</td> <td>Negotiating</td> <td>Not Signed</td> <td>[Icons]</td> </tr> <tr> <td>[Redacted]</td> <td>Stu Wood</td> <td>Dec 05, 2017 05:02 p...</td> <td>Dec 12, 2017 05:02 p...</td> <td>0 of 1 Signed</td> <td>Not Signed</td> <td>[Icons]</td> </tr> <tr> <td>[Redacted]</td> <td>Mike110 Eya...</td> <td>Dec 01, 2017 08:39 a...</td> <td>Dec 08, 2017 08:39 a...</td> <td>0 of 1 Signed</td> <td>Not Signed</td> <td>[Icons]</td> </tr> <tr> <td>[Redacted]</td> <td>Mike Eyal</td> <td>Nov 30, 2017 03:25 p...</td> <td>Dec 07, 2017 03:25 p...</td> <td>0 of 3 Signed</td> <td>Not Signed</td> <td>[Icons]</td> </tr> <tr> <td>[Redacted]</td> <td>Mike Eyal (@securedsigning.com)</td> <td></td> <td>Dec 06, 2017 11:32 a...</td> <td>Expired</td> <td>Not Signed</td> <td>[Icons]</td> </tr> <tr> <td>[Redacted]</td> <td>Gil Gall (@dsx.co.nz)</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>[Redacted]</td> <td>Stu Wood (@securedsigning.com)</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>			Name	Invitees	Start Date	Due Date	Status	Last Signed	Actions	[Redacted]	Stu Wood	Dec 07, 2017 09:59 a...	Dec 14, 2017 09:59 a...	1 of 2 Signed	Dec 07, 2017 10:01 a...	[Icons]	[Redacted]	Stu Wood	Dec 07, 2017 09:31 a...	Dec 14, 2017 09:31 a...	1 of 2 Signed	Dec 07, 2017 09:33 a...	[Icons]	[Redacted]	Stu Wood	Dec 07, 2017 08:32 a...	Dec 14, 2017 08:31 a...	Negotiating	Not Signed	[Icons]	[Redacted]	Stu Wood	Dec 05, 2017 05:02 p...	Dec 12, 2017 05:02 p...	0 of 1 Signed	Not Signed	[Icons]	[Redacted]	Mike110 Eya...	Dec 01, 2017 08:39 a...	Dec 08, 2017 08:39 a...	0 of 1 Signed	Not Signed	[Icons]	[Redacted]	Mike Eyal	Nov 30, 2017 03:25 p...	Dec 07, 2017 03:25 p...	0 of 3 Signed	Not Signed	[Icons]	[Redacted]	Mike Eyal (@securedsigning.com)		Dec 06, 2017 11:32 a...	Expired	Not Signed	[Icons]	[Redacted]	Gil Gall (@dsx.co.nz)						[Redacted]	Stu Wood (@securedsigning.com)					
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We Sign

Recognition of PDF Form Fields

We Sign process able to recognize form filed in PDF files, allow you to use them you can keep them or remove form the document to be signed.



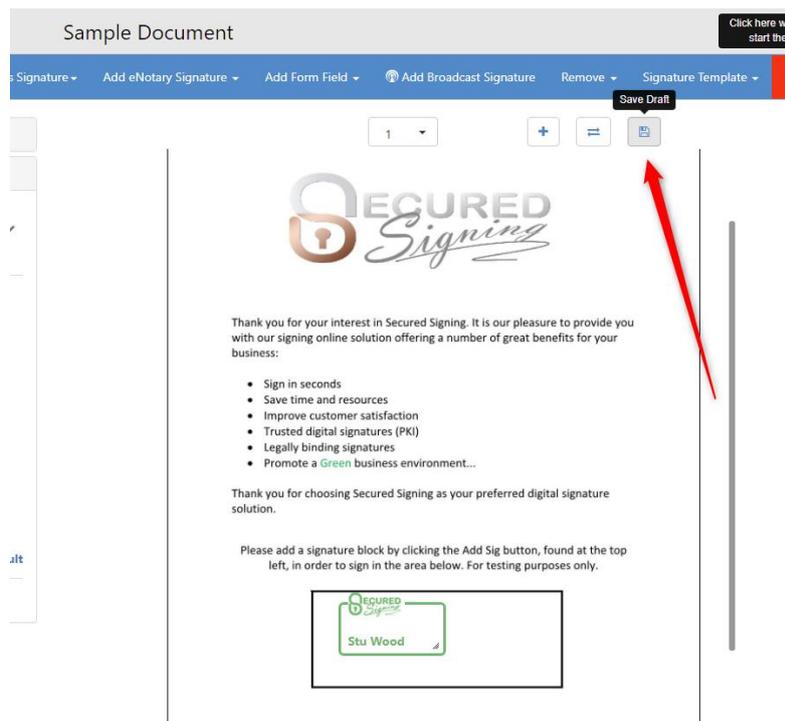
By default, this option is available

In case you set it to On , disable this function the question popup above will be gone and form fields will be flattened to the document without option for signer to enter anything in the form fields.

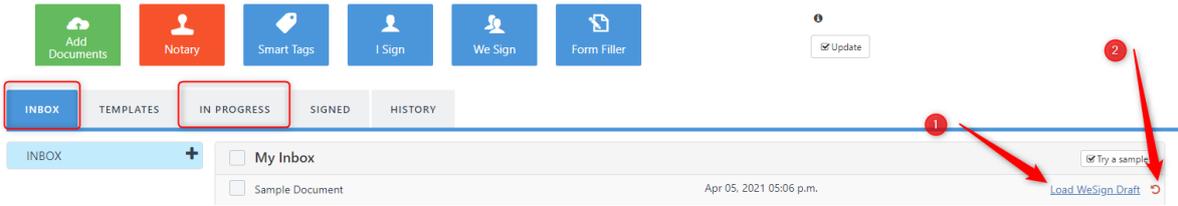


Save draft

To save a draft and continue tagging the document later use the Save Draft button in WeSign. Every 5 minutes a draft will also auto save.



Once a draft has been saved it will appear in Inbox and in Progress tabs.



1. Load We Sign Draft - To access and continue tagging the document and send
2. Remove Document draft - Remove all fields and signatures and start again.

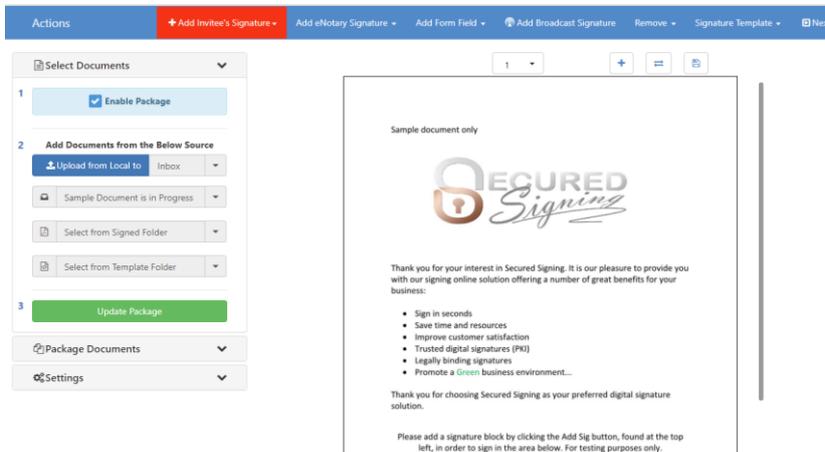
Add Document

You can add a document to a package during the set up in WeSign, using the Select Documents



panel on the left.

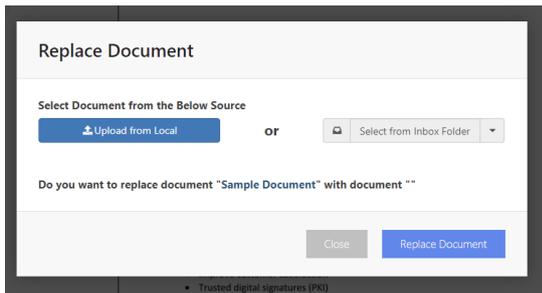
The document can be added from your desktop, inbox, Signed folder, or the template list.



To do this, select the document from the dropdown menus below click Update Package.

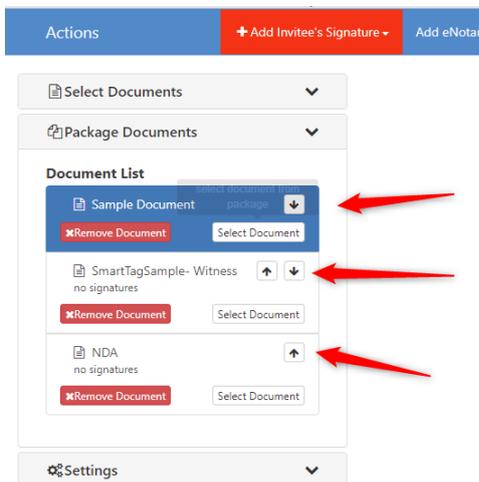
Replace Document

If you start the WeSign need to replace the document with another file without losing all the form fields and signature positions on the document. To do this select the Replace Document button if the page size or number changes between the documents you may need to do rearrange some form fields and signature positions.



Documents order in Package

To change document order in signing process, use the up or down arrows in the Document List. The top document will be first in the signing process.



Needs to View Field (New)

A sender can choose to assign an Invitee a Needs-to-View field for documents that is required to be viewed but not signed.

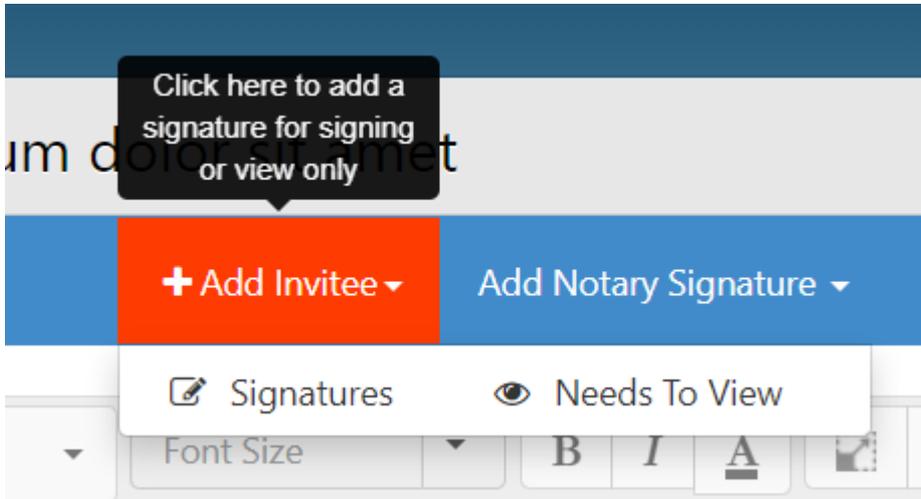
Setting to Enable

My Account -> My Settings

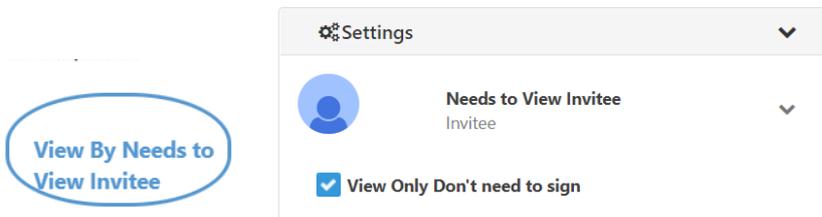


Adding a Needs to View field

With the setting enabled, Add Invitee Signature button will now display as the following:



A Needs to View field acts the same way as a Signature field

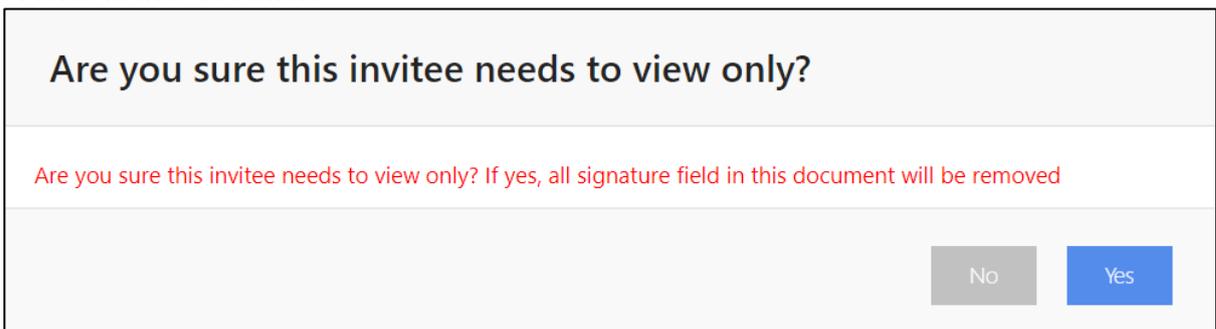


Needs to View has the following rules:

- An Invitee cannot both be a Needs to View and a Signer for the same document.

Invitee already exists in the document. An Invitee cannot be added as both a signer and a view only.

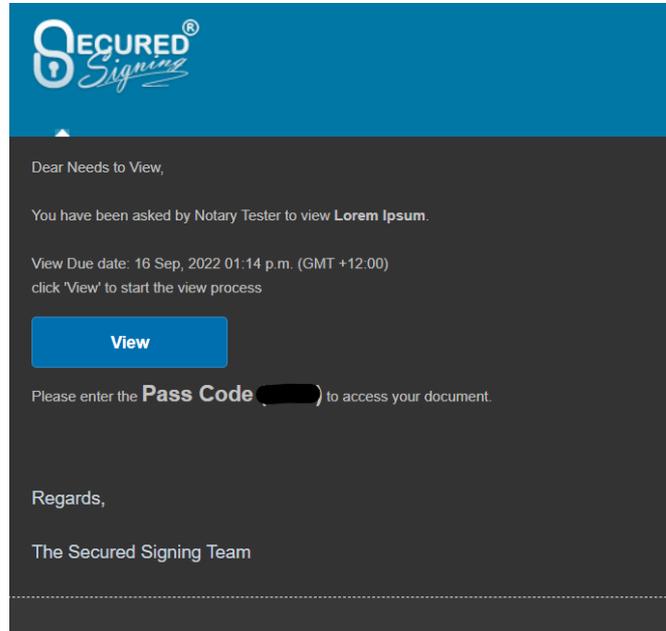
- Converting a Signature field to a Needs to View field will remove all existing Signature Fields in that document



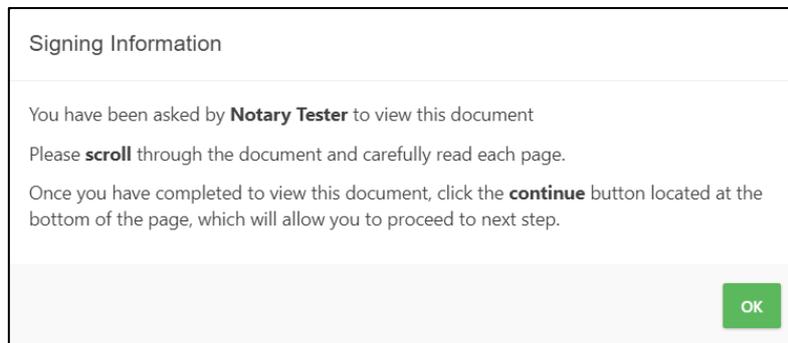
- Only one Needs to View field is required per document per Invitee

Viewing a Document

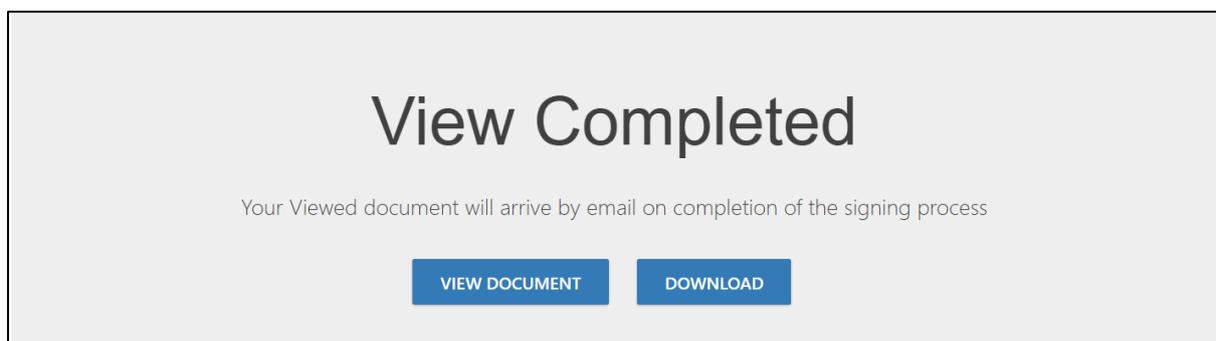
A Viewer will get an invitation to View the document



Once the chosen Authentication is done, the invitee will view the document.



Once finished viewing, the user can select the Continue button at the bottom of the page to proceed.



A document log is maintained for the whole process and the Viewer is also added to the Signing Completion Certificate.

Needs to View for Video Signing and Notary RON Sessions

Needs to View fields can be added for Video Signing and Notary RON Sessions

A Needs to View Invitee will get an invitation on their e-mail and will have to join the meeting to view the document.

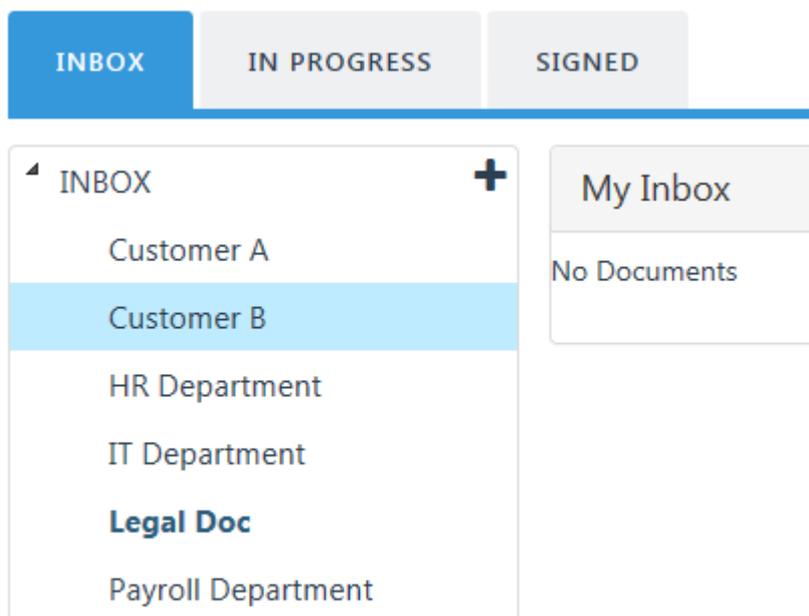
My Documents

In the following pages we will update you with the new features and functions now available in your Secured Signing My Documents Page.

Folder

Many customers asked us for a way they can better organise their uploaded documents across our tabs.

By Clicking on + next to Inbox you can create new folder. Admin user and any other users in the account can create folders as required for their needs. Each of these folders are for personal use by each user.

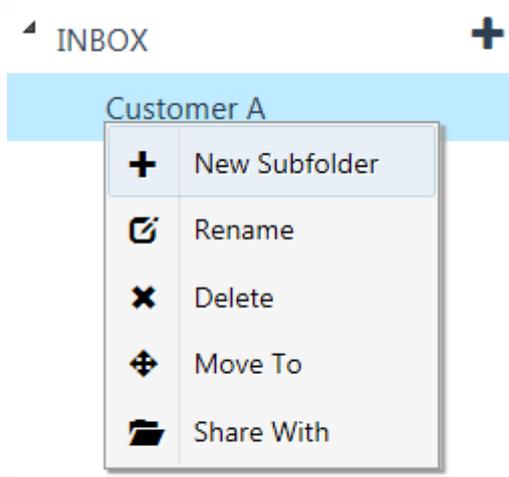


The document in the folder will change Tab location based on the signing process. First it will be in Inbox Tab, once sent for signature the document will move to In Progress Tab, once the document has been signed it will move to Signed Tab.

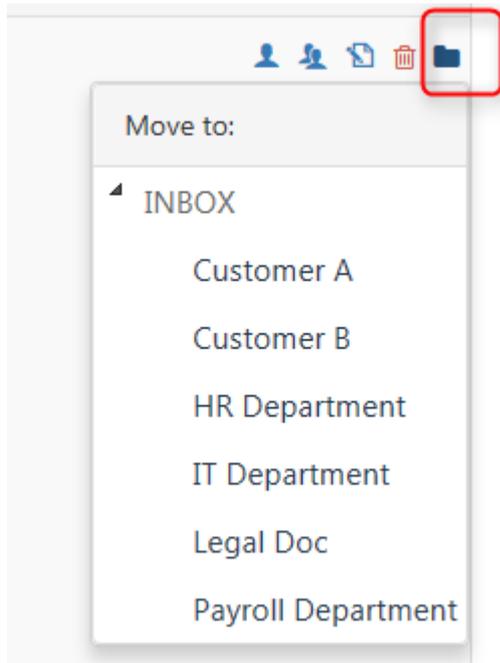
Clicking on the menu bar next to folder name you will be able to:

- Create subfolder

- Rename folder name
- Delete folder – it must have no documents in this folder in all documents status tabs
- Move to – you can move the folder to another folder
- Share with – only Admin user can share folder with other users in your account.



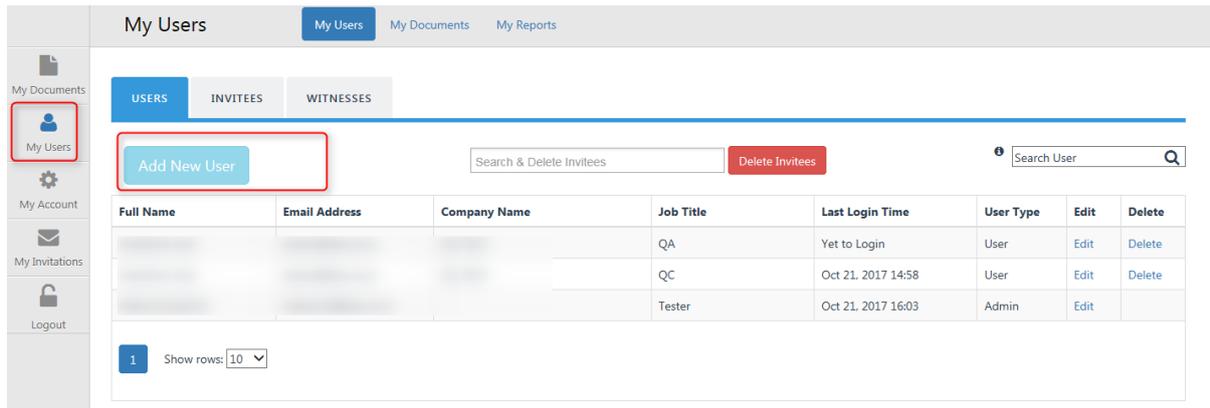
You can move document from folder to folder, just click on the folder icon in the grid and move it to the new location



Shared Folder – Collaboration Tool

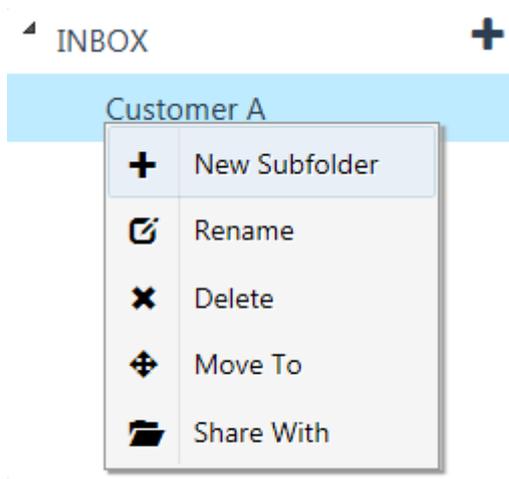
In paid plans (such Pay as you Go or Team Edition) the account has the option to add more users. Not available to enterprise account.

Add more users in My Users if your plan allows you, if not upgrade your plan to a paid account with the appropriate number of users.



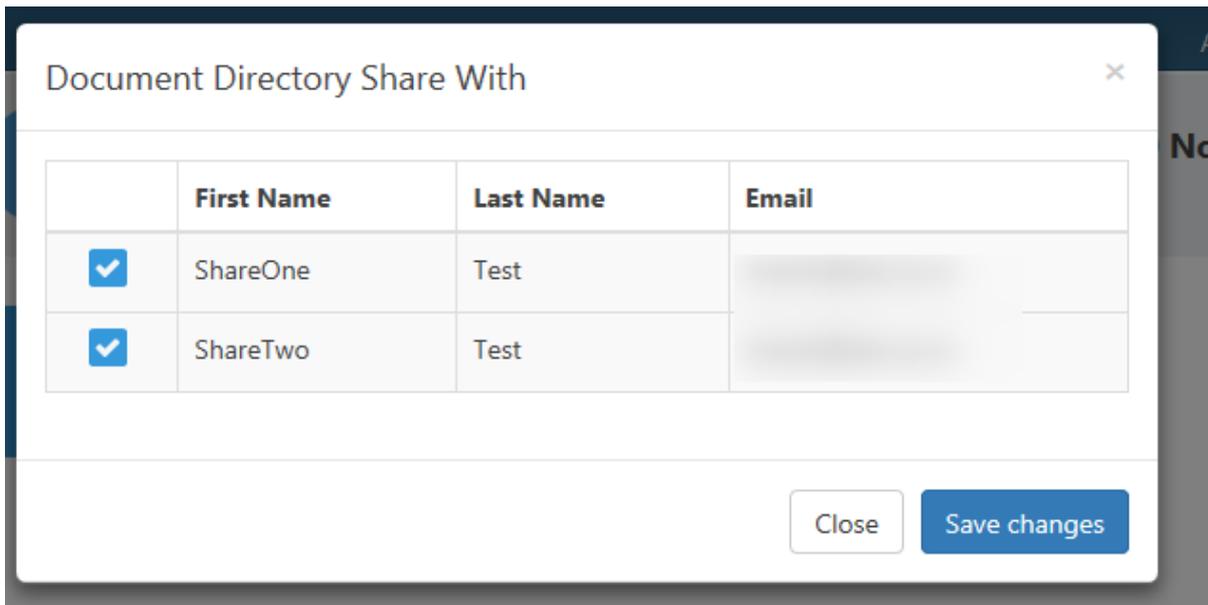
Once you added more users, Account Admin user will be able to share folders with other users in same account.

Admin User login to Secured Signing account and select the folder you want to share, click on the menu bar and press share with



Now select the users in your account you want to share with. In the next popup, tick the box next to the name and save changes, the folder colour will change to notify you it is a shared folder.

The shared folder will appear in the folders list for all users in the account. Only Admin user can delete a shared folder but only when it is empty and has no documents in this folder.



How Does Shared Folder Work?

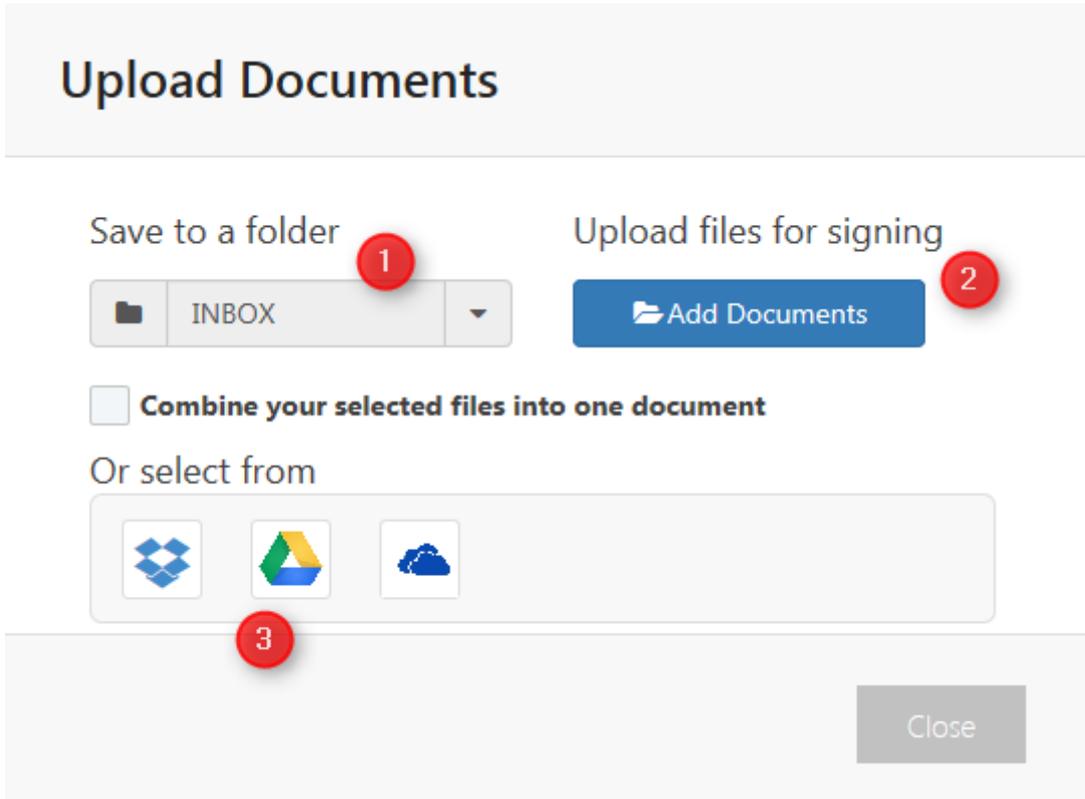
- Any document that is uploaded by any user to the shared folder will be visible to all Account’s users.
- A user who sent the document for signature becomes the document owner.
- After the document has been sent for signature it will be moved to In Progress Tab and will be visible for all account’s user.
- In the Progress Tab, there are number of action icons, any user will be able to use one of these actions. However, the delete function will only be available for document owner. Other users will be able to supervise and oversee the signing process.

Actions



Upload Documents

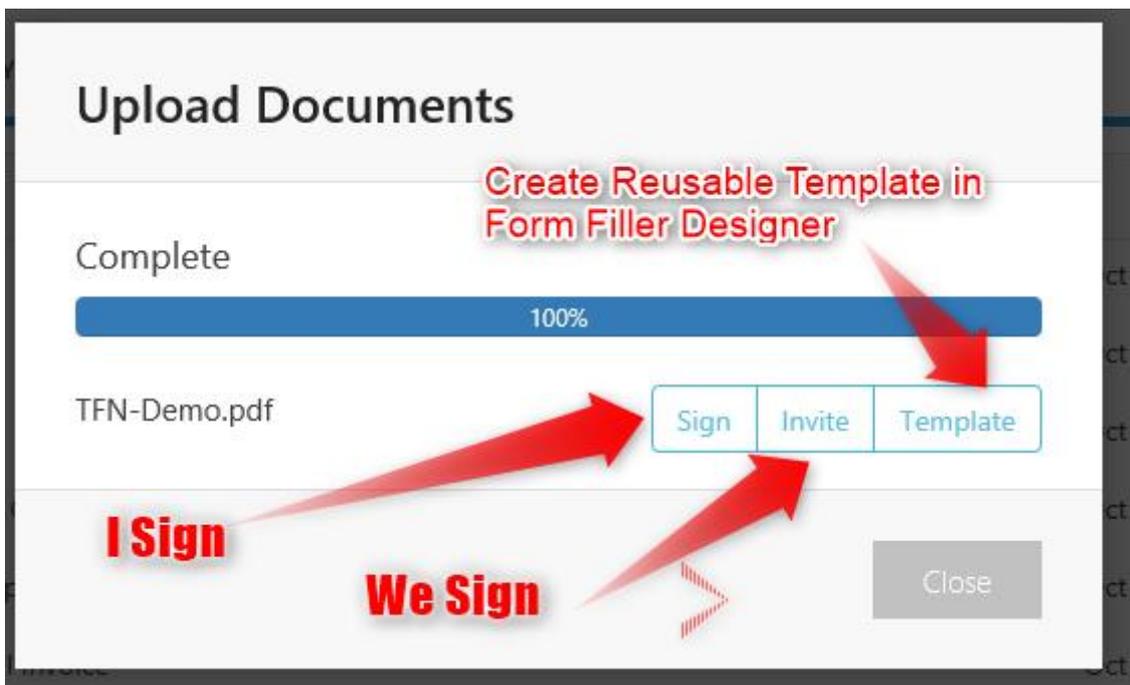
You can upload documents to Secured Signing from your local and network disks (2) or select a document from you preferred cloud storages such as Dropbox or Google drive or One Drive (3). You can redirect files to be saved in appropriate folder in your Secured Signing folder (1).



In case you are logged in to Secured Signing and you already in specific folder the added document will be saved in that folder.

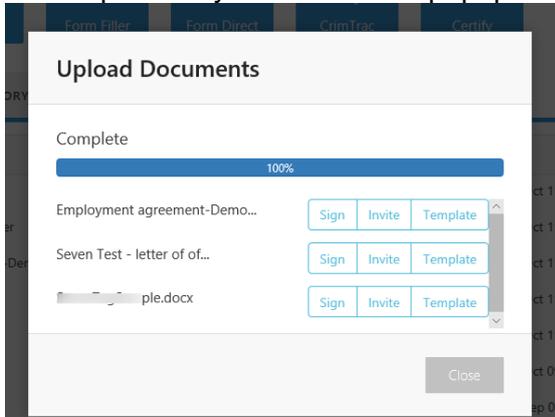
To add documents from Google Drive and Drop Box you must establish the connection and connect Secured Signing to be able to pick document from your preferred cloud storages.

Once document uploaded you can select what to do next



Upload Multiple Documents

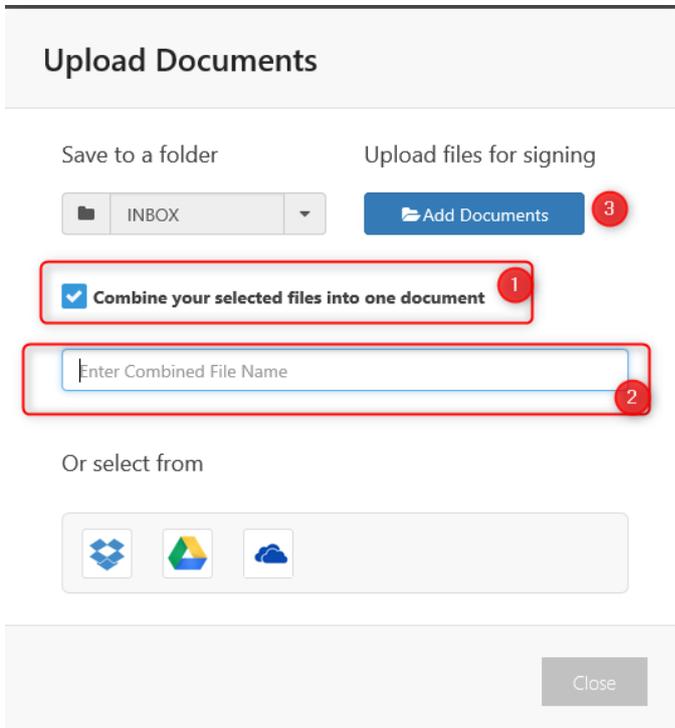
Secured signing support multiple file upload, press upload, browse to file location and hold the Ctrl key in your keyboard to select multiple file
Once uploaded you will see this popup



Select which file you want to start signing process or go the Inbox to select document or create a package

Combine documents

Sometimes you have few documents in PDF, MS Word or in other file formats supports by secured signing and you need to combine all to one document that needs to be signed.



Just tick the combine option in upload popup enter the new (combine) document name and upload multiple documents to be combined.

In term of document counter in combine mode, if 3 documents uploaded to be combined to new document name, the counter will count this process as 3 documents.

The upload order set the page order, file that selected first in upload process will be first document/ first page to appear in new document / combine document.

Saved Signed Documents in Preferred Cloud Storage

Secured Signing uses Personal PKI Digital signature technology. As this technology allows for the document validity to be verified by any PFD reader, we do not keep your signed documents in Secured Signing for long term archiving.

For long term archiving you can setup to save the signed document in your preferred cloud storages such as Google Drive or Dropbox. Once the document has been signed in either I Sign, We Sign, Form Filler, and Form Direct the signed document will be saved in your preferred cloud storage.

After 7 days from when the document has been signed it will be removed for your Secured Signing account and an email notification will be sent out to document owner.

To set up your account with your preferred cloud storage login to Secured Signing, My Account -> My Settings -> Switch Preferred Cloud Storage -> select one of them and press connect -> once connected press update My Settings. You can disconnect at any time form your cloud storage.

My Details

My Settings

Update My Settings

Signature Date Format: 22 Oct. 2017

Maximum Signing Due Date: 2 Week

Default Due Date: 7 days

Display Name: Common Name (Mike110 Eyal110)

Form Filler templates scope: User

Delete Form Filler templates: Nothing selected (Delete Template)

Branch Name: [Empty]

Account Ref.: [Empty]

Signing Order: Sign All Sign One by One

Secured Signing Cloud Storage: OFF

Preferred Cloud Storage: ON

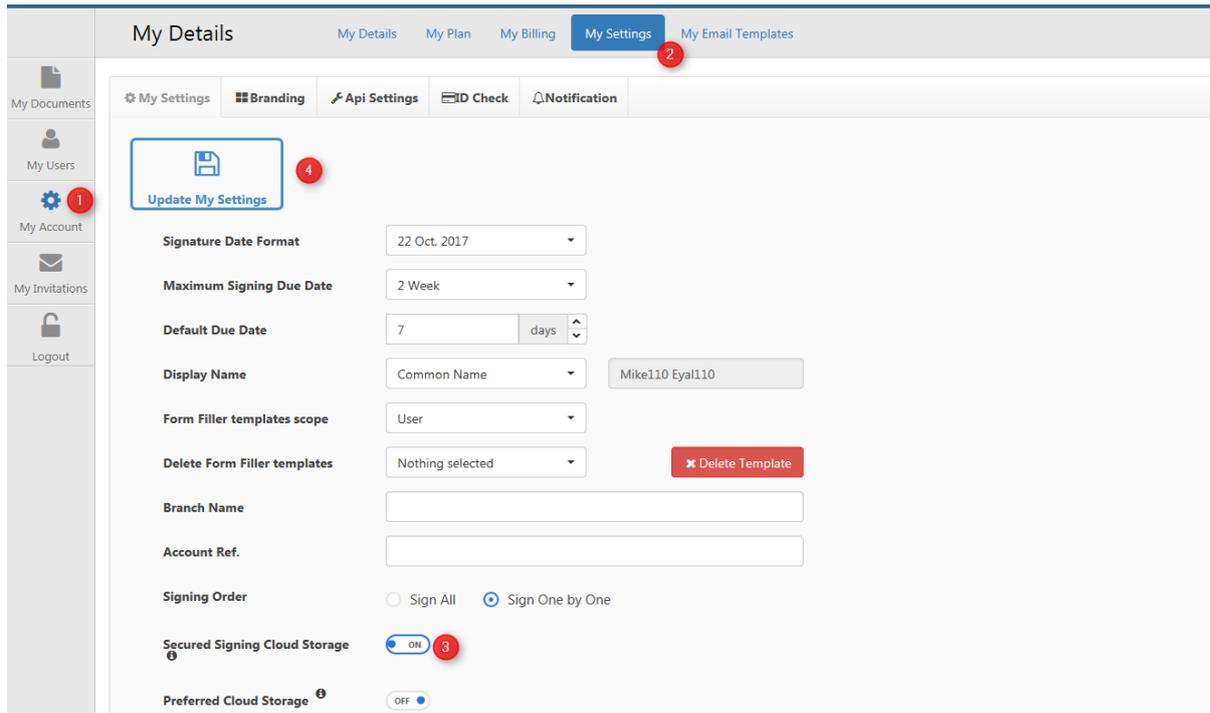
Google Drive (Connect) Drop Box

Document History

On the removal document Service, we will save the document in encrypt cloud storage for long-term archiving. The document will be accessible in the history tab.

When using 3rd party cloud storage services, Secured Signing have no control, and no responsibility for the content, privacy policy, or practices of any cloud storage. By enabling this service, you acknowledge and agree that we shall not be responsible for any damage claims or other reliability arising from or related to your use of the cloud storage service

To switch this function on please login to your Secured Signing account -> My Account -> My Settings -> switch Secured Signing Cloud storage to on -> Update My Settings



A new Tab will appear in your My Document page labelled History



By Clicking on the History Tab, you will be able to see all removal documents. Please keep in mind that any document removed manually by document owner will also appear in the history Tab.

The screenshot shows the 'My Documents' interface. At the top, there are tabs for 'My Documents' and 'My Reports'. Below this, there are two tabs: 'ACTIVE DOCUMENTS' and 'HISTORY'. A search bar is present with a search icon. Below the search bar, there are two filter boxes: 'Document Folder: Select a Folder' and 'Document Date Created: Select Date Range October 1, 2017 - October 31, 2017'. Below the filters is a table with the following columns: Document Owner, Document Name, Date Created, Last Sign Date, Status, and Actions. The table contains several rows of document data. The 'Actions' column for the third row (Complete status) is highlighted with a red box.

Document Owner	Document Name	Date Created	Last Sign Date	Status	Actions
		Oct 15, 2017 08:17	Oct 15, 2017 08:17	Signed	
		Oct 12, 2017 09:36		Signing	
		Oct 11, 2017 17:05	Oct 11, 2017 17:08	Complete	
		Oct 10, 2017 17:56	Oct 10, 2017 17:56	Signed	
		Oct 10, 2017 09:10	Oct 10, 2017 10:27	Complete	
		Oct 9, 2017 16:39	Oct 9, 2017 16:40	Complete	

Select the folder you are after and the date range you are looking for. You will be able to view and download the document.

Integration

Secured Signing API supports integration with other system. We have out of the box integration and continue to add new capabilities to this.

Keep up to date with our connector please visit our website <https://www.securedsigning.com/products/integrations>

Google Drive

Upload document for signing directly from Google Drive

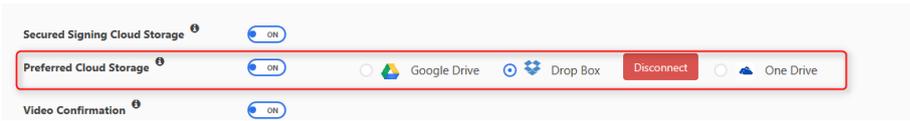
The screenshot shows the 'Upload Documents' dialog box. It has a title bar 'Upload Documents'. Below the title bar, there are two sections: 'Save to a folder' with a dropdown menu showing 'INBOX' and an 'Add Documents' button, and 'Upload files for signing' with an 'Add Documents' button. Below these, there is a checkbox 'Combine your selected files into one document'. Underneath, there is a section 'Or select from' with three icons: OneDrive, Google Drive (highlighted with a red box), and Dropbox. At the bottom right, there is a 'Close' button.

The first time the system will take you to connect your Google Drive account with your Secured Signing account.

Saved signed document in Google Drive automatically. To set it up go to My account -> My Settings -> Preferred Cloud storage -> connect and save

The screenshot shows the 'My Settings' dialog box. It has a title bar 'My Settings'. Below the title bar, there are three sections: 'Signing Order' with radio buttons for 'Sign All' and 'Sign One by One', 'Secured Signing Cloud Storage' with a toggle switch set to 'ON', and 'Preferred Cloud Storage' with a dropdown menu showing 'Google Drive' (highlighted with a red box) and buttons for 'Connect', 'Drop Box', and 'One Drive'. Below this, there is a section 'Video Confirmation' with a toggle switch set to 'ON'.

You can disconnect at any time



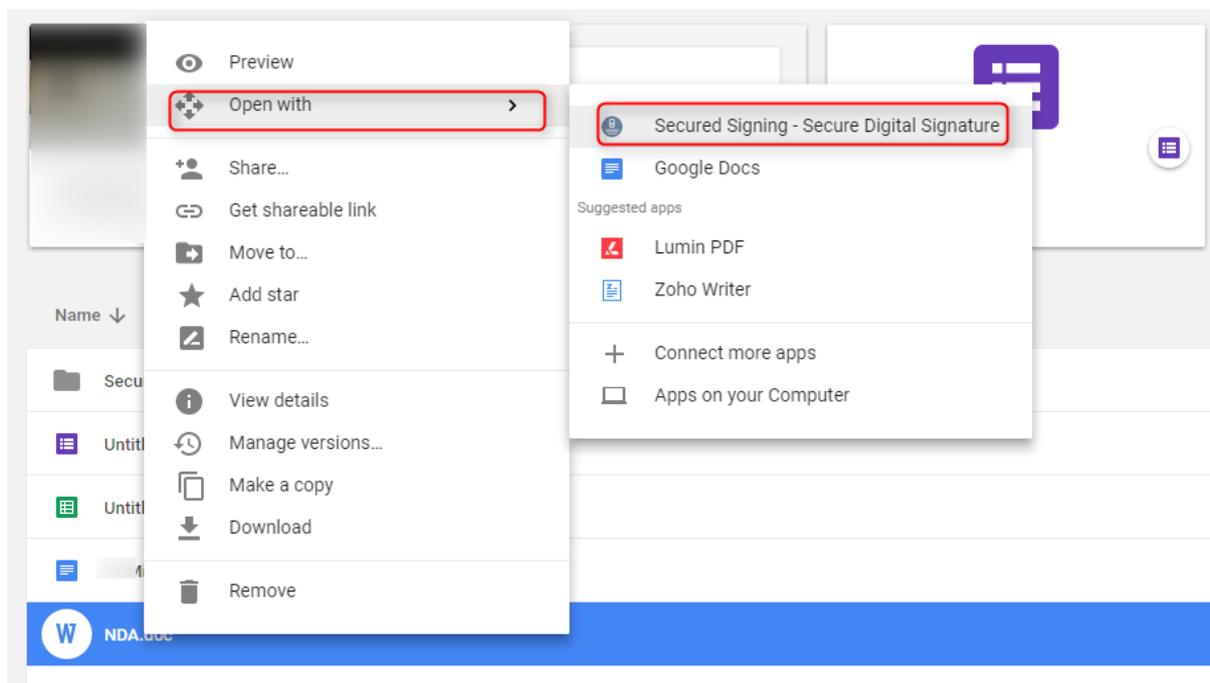
Google Doc

Initiate the signing process from Google doc.

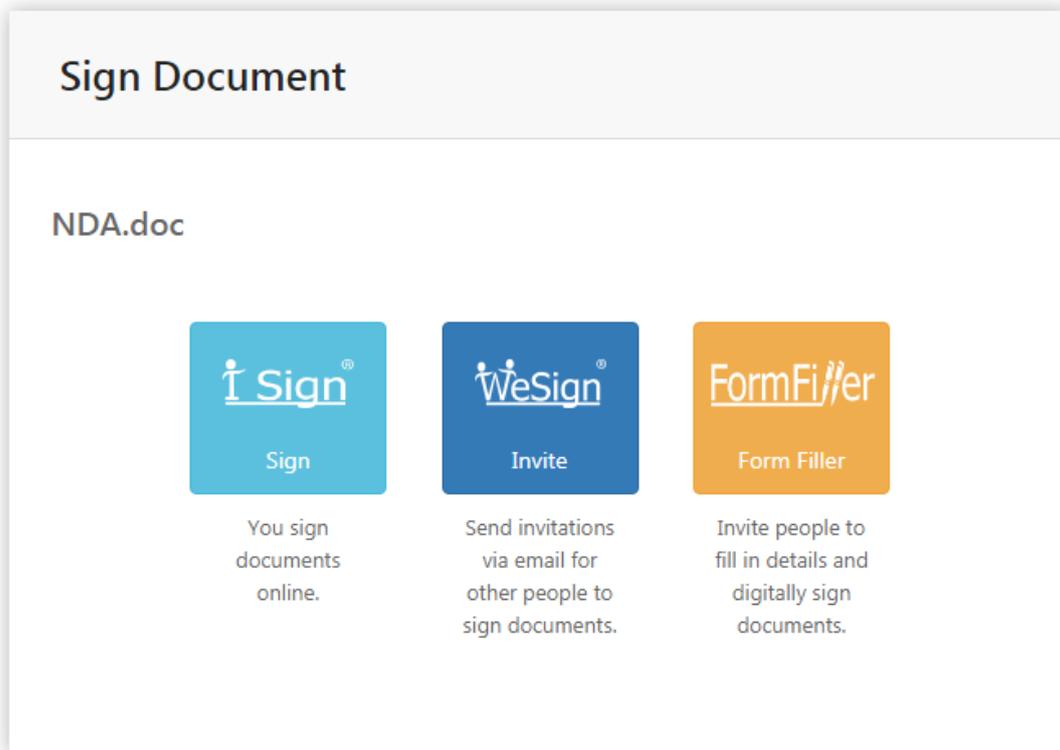
To connect, go to more App from Google Doc setting and connect to Secured Signing App.

Once connected select the document you want to send for signature. Right click on the document -> open with -> select Secured Signing.

You will need to connect your Secured Signing account first.



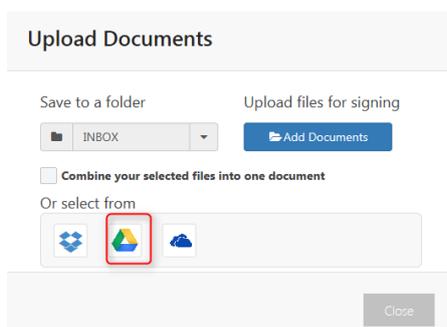
Select the signing process you want to initiate



And sign or send invitation for Secured Signing process.

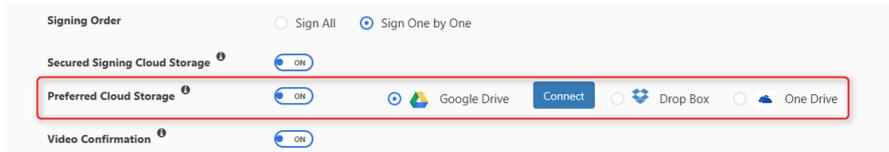
Drop Box

Upload document for signing directly from Dropbox.



The first time the system will take you to connect your Dropbox account with your Secured Signing account.

Saved signed document in Dropbox automatically.
To set it up go to My account -> My settings -> Preferred Cloud storage -> connect and save

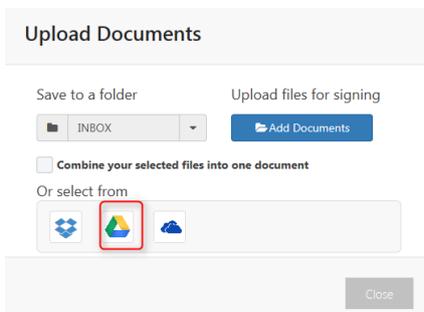


You can disconnect at any time



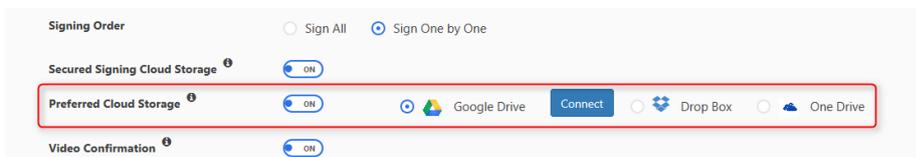
One Drive

Upload document for signing directly from One Drive



The first time the system will take you to connect your One Drive account with your Secured Signing account.

Saved signed document in One Drive automatically.
To set it up go to My account -> My Settings-> Preferred Cloud storage -> connect and save



You can disconnect at any time



Smart Tag

Smart Tag makes the document ready for Secured Signing outside of our system. Secured Signing’s Smart Tag technology automates document creation and streamlines the invitation and signing process to enhance faster document turnaround and better user experience.

For more information about smart tag have a look at our smart tag guide at <https://ds.securedsigning.com/support/demo-assets/Smart%20Tag%20Guide.pdf>

While uploading the document you can manually add or remove function such;

- Email completion – Yes / No, you can decide if email completion will be sent out at invitee level. The default is yes for sending email upon completion.
- Set which folder signed document will be saved at.

Smart tags

Please check your invitees and recipients

SmartTagSample-TextLink+V+R+T.docx

Document Negotiation

Invitees:

1 Attachments

SMS Notification SMS Authentication

Enable IDCheck Review Before Signing Video Confirmation

Send Completion Email Face2Face Sign

Smart tags

Due Date ⓘ ⓘ

Save to a Folder ⓘ ⓘ

Invitation Email Template

Completion Email Template

Notification Recipients

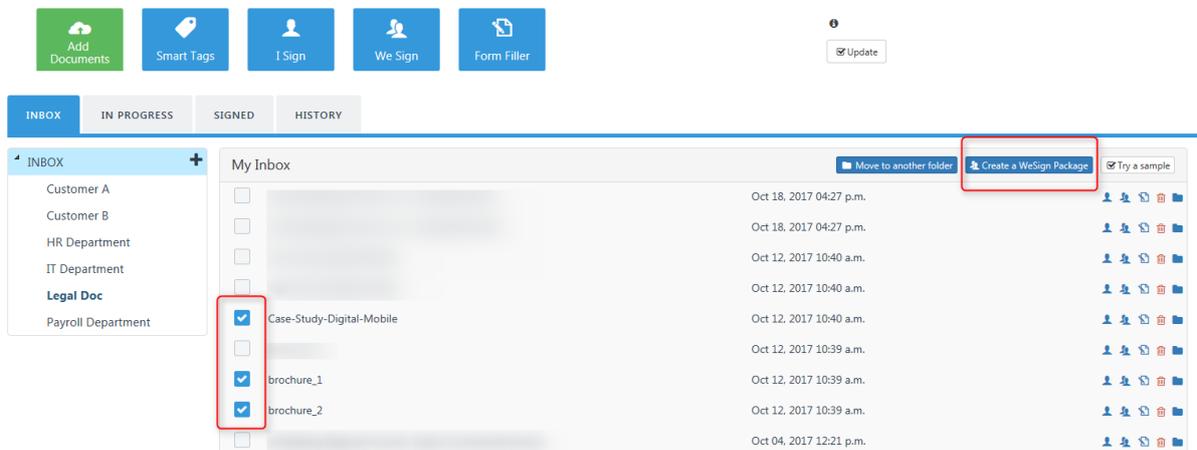
Completion Recipients

Document Packaging

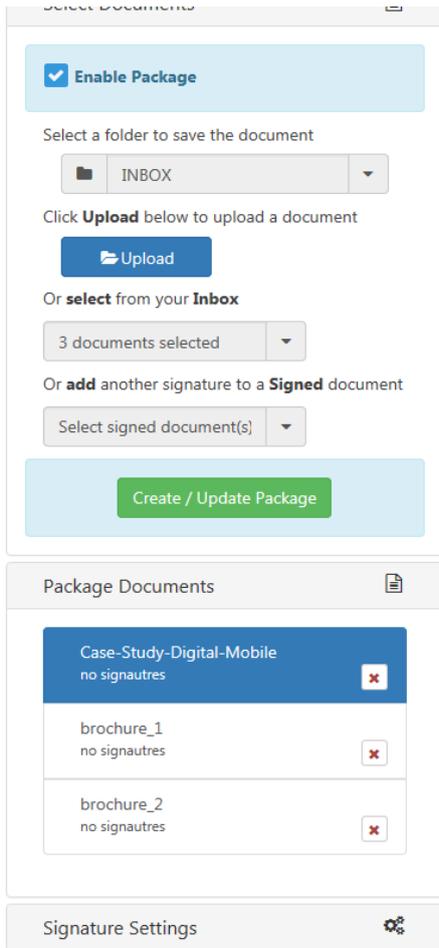
When you need someone to sign more than one document, creating a We Sign package makes it simpler. The main advantage is that the invitee will receive a single invitation to sign all the documents rather than separate email invitations for each document. Signing a package of documents is simple, with Secured Signing stepping the signer through all the documents one by one.

Document packaging provides one email invitation includes one link to access the package and sign all documents.

We Sign and Form Direct processes supports the creation of each package. Tick the document you want to include in the package.

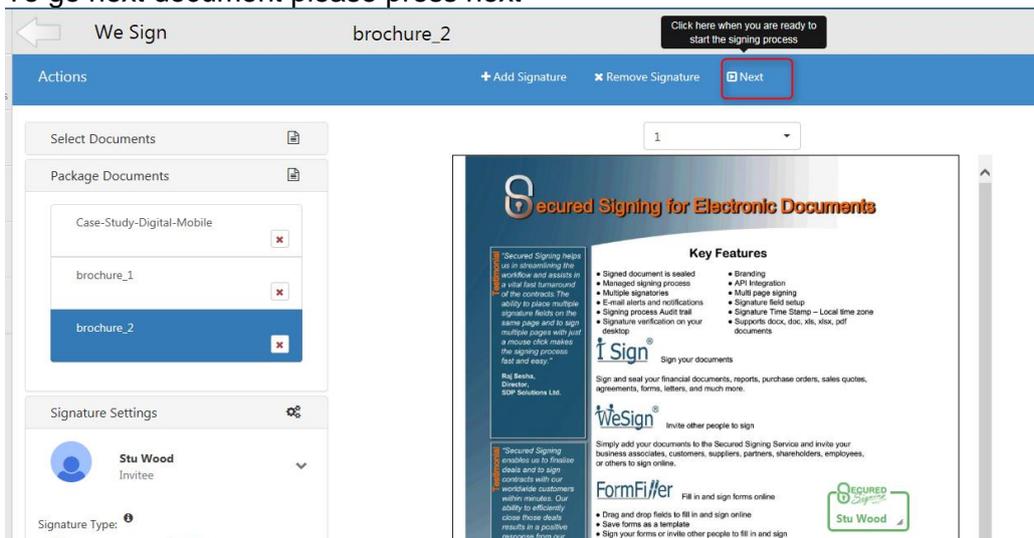


You can modify the package from We Sign designer page.



You can add more or remove document to the package.

To go next document please press next



Once you've added all invitees to all document you will be able to setup the invitation and decide on the signing workflow.

At package level

Invitation Workflow

Package **Invitees** Documents

Package Name Document Package 12:40 Oct 22, 2017

Due Date 29/10/2017 12:40 pm

Cancel Send

At invitee level

Invitation Workflow

Package **Invitees** Documents

Signing Order Type

Sequential

Stu Wood Edit Invitation Email Select Attachments

Included in 3 Documents >

Cancel Send

At document Level, then press send

Invitation Workflow

Package Invitees **Documents**

Document Order

Enable

Case-Study-Digital-Mobile

Enable Effective Date

1 Stu Wood

brochure_1 >

brochure_2 >

Cancel **Send**

Invitee will receive email invitation and the link will take them to sign document by document.

To create a package in In Form Direct, just select the required forms from the list and the system will prepare the package for you.

Form Direct

1. Select your forms | 2. Invite | 3. Email Template | 4. Setup workflow | 5. Review

Forms

- Government Form
- Induction 2
- Pre-Hire Forms Standard
- Verify Application
- MobileForm - Site Safety
- Crimtrac Declaration
- Tax code declaration
- iSaver Deduction Form -
- Saver OptOut Request -
- Pre-employment check
- Tax rate notification for contractors

Attachments

- Marketing
- Secured Signing -
- Case-Study-Digital-Mobile

Upload Additional Attachments

(Valid format: pdf,doc,docx. Max size: 3MB, 1 file for each upload, can upload many times.)

[Add Attachments](#)

Document Negotiation

Secured Signing provides a complete document workflow from negotiation, review and through to secure digital signing. Including document negotiation as part of the signing workflow is a quicker, more secure, and simpler way to finalize the details of your agreement. The seamless transition from negotiation to signing ensures the agreed document is signed without delay.

The process has 2 steps. First an approval stage, once all parties approved the document in the same approval round, the second digital signature stage will start to seal the document with the signatures.

First enable document negotiation in My Account My Settings - > and buy Credit. Each document negotiation process has a cost

Upload From PC (Attachments) ON

Review Before Signing ON

Document Negotiation ON (44 credits remaining) ⓘ

Enable Effective Date ON

No wait ▼

Buy Document Negotiation Credits

[Buy Document Negotiation Credits](#)

In We sign for one document (doesn't support document package) process invite 2 or more invitees to sign online. In the invitation workflow popup please tick document negotiation, be sure you have credit. The process will be sequential, initiate by pressing send.

Invitation Workflow

Due Date ⓘ ⓘ

Signing Order Type ⓘ Sequential

Document Negotiation ⓘ Enable (44 credits remaining)

Effective Date Enable

Additional Notification Recipients ⓘ Additional Completion Recipients ⓘ

Check Invitees

1. Mike ✉ Edit Completion Email ✉ Edit Invitation Email 📎 Select Attachments

Enable SMS Notification Enable SMS Authentication

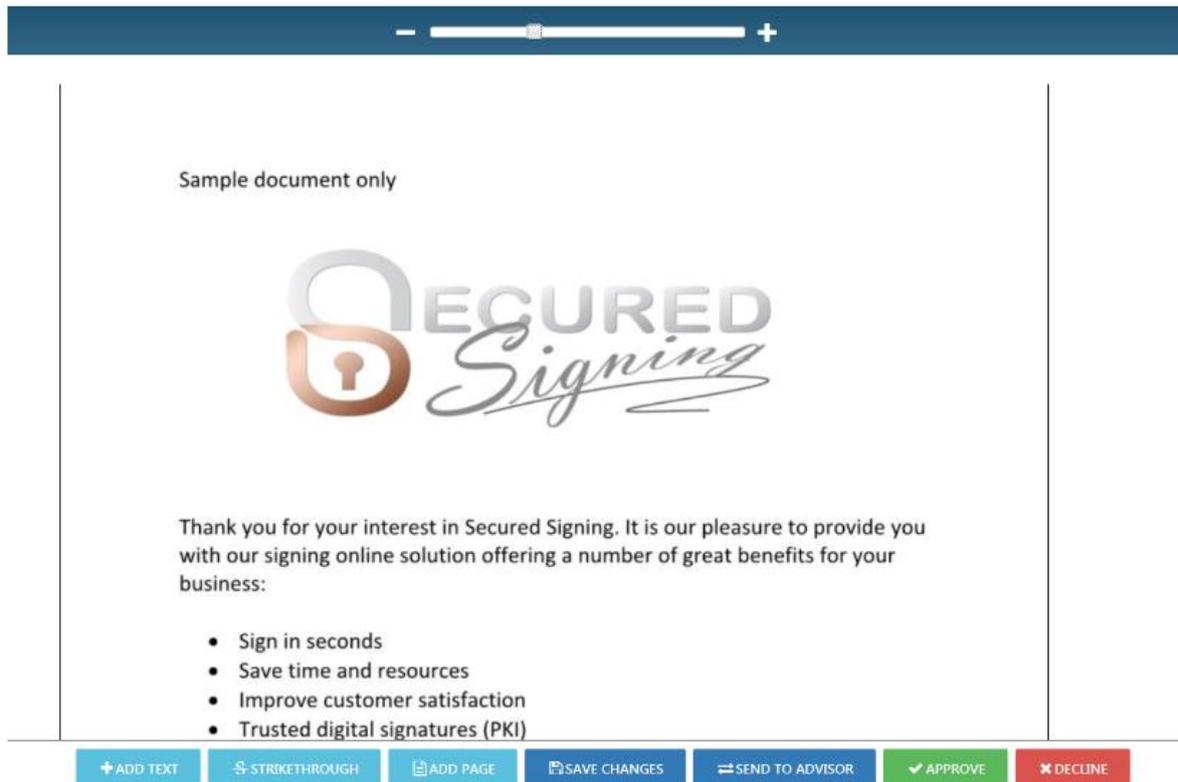
Enable IDCheck Review Before Signing Video Confirmation ⓘ

2. Stu Wood ✉ Edit Completion Email ✉ Edit Invitation Email 📎 Select Attachments

Invitees will be able to access the document negotiation process from the email invitation as normal.

Invitee will be able to:

- **Add Text** - Additional text can be added and positioned in the document as required.
- **Strikethrough** - Text that needs to be excluded from the agreement is marked up with a strikethrough.
- **Footnotes** - Notations and other comments can be included as a footnote with a reference placed against the relevant part of the agreement.
- **Add a Page** - There is no limit to the additional clauses or paragraphs added to the original agreement. Additional pages can be appended as required.
- **Save** - The signer can save the changes made to the document at any time and return to the document review by again clicking the link in the invitation email.
- **Send to Advisor** - Each signer may choose to also refer the document to an advisor for their changes and comments.
- **Approve** - Once all the required changes to the document have been made, the revised agreement is approved to submit to the other parties for review and approval.



For more information, please watch the following videos:

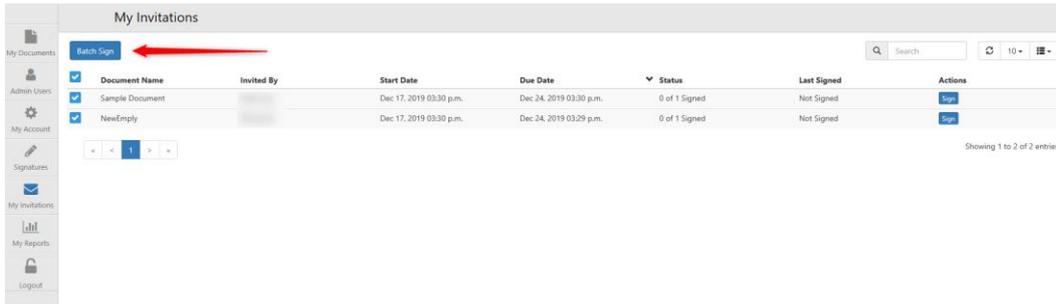
1. Adding Document Negotiation to signing process
<https://player.vimeo.com/video/234259693>
2. Invitees participating in document negotiation
<https://player.vimeo.com/video/234260249>

Batch Signing

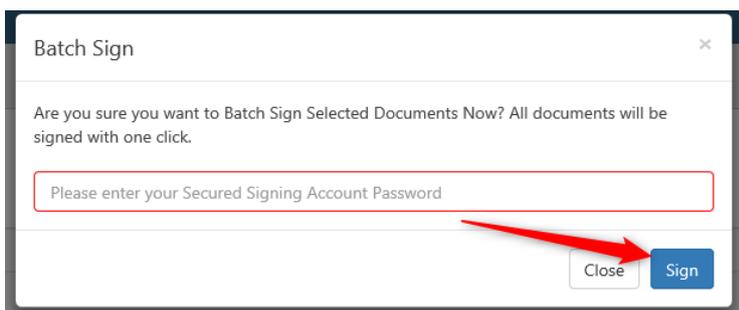
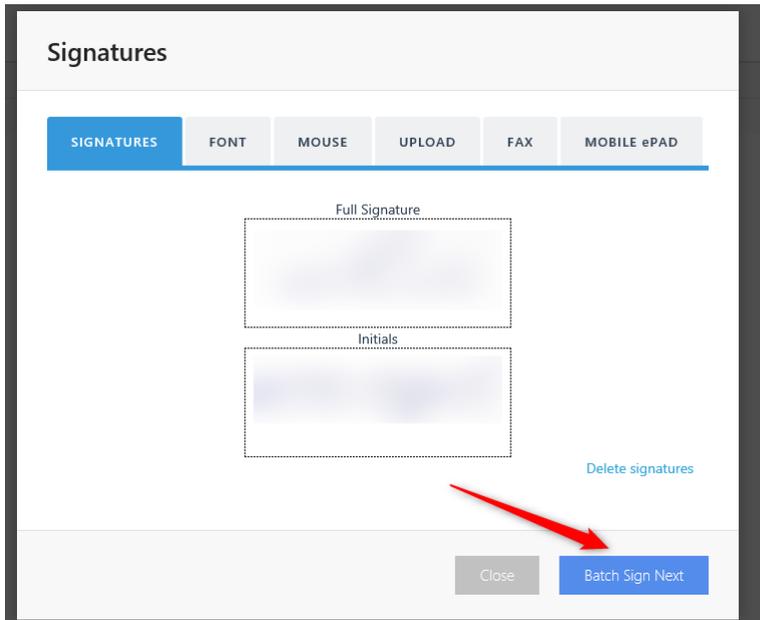
Secured Signing's customer research has found senior executives in both public and private sectors typically needed to sign several documents or letters on an ongoing basis. To comply with legislation, electronic versions of these documents need to be sealed with digital signatures.

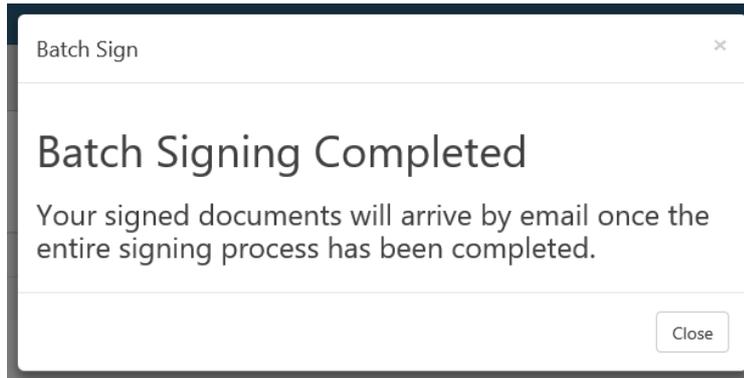
Now, when a Secured Signing account owner (Free or Paid) is invited to sign multiple documents, they can complete the signing process with a single click. To start batch signing, Secured Signing customers go to My Invitations and tick the documents they need to sign.

Click *Batch Sign* and hundreds - or even thousands - of documents can be signed automatically.



Select which graphical signature to use and press Batch sign, then enter your Secured Signing Password





Batch signing complements Secured Signing's suite of digital signature solutions.

Here's how these technologies work together to protect documents:

- All documents are sealed by a tamper-proof mechanism. So, if the document is changed, all signatures are invalidated.
- Detailed audit trails, increasing the validity of all agreements.

Batch signing works with We Sign and Smart Tag documents, that don't have form fields, witnessing, additional notification, or review before signing.

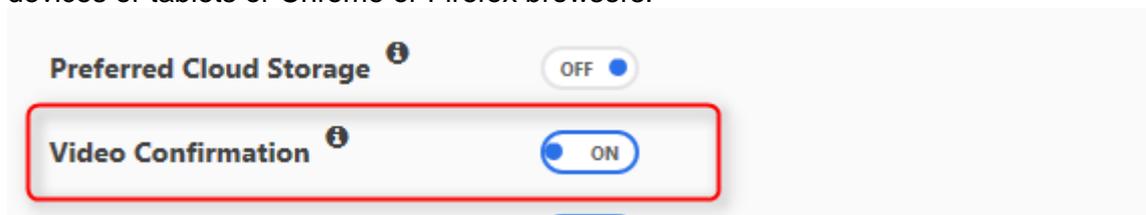
Video Confirmation

Secured Signing's video confirmation of the identity of the signer complements the inherent authenticity and reliability of PKI digital signatures, to provide unchallengeable proof of who signed the document. The video recording captures the signer performing gestures specific to the document and recorded in the document log. The location and password for the confirmation video are contained in the signed document. The tamper proof mechanism of the digital signature ensures the video confirmation details cannot be altered without invalidating the signature.

Video confirmation provides the highest confidence in the identity of the signer.

By Default, Video confirmation is available for all your signing processes. If you wish to switch it off, go to My Account My Settings.

Add Video Confirmation to the signing process. Signer can use iOS and Android smart devices or tablets or Chrome or Firefox browsers.



Please tick which invitee are required to complete Video confirmation in Invitation workflow.

Invitation Workflow

Due Date ⓘ	Signing Order Type ⓘ
29/10/2017 10:34 am	<input type="checkbox"/> Sequential
Document Negotiation ⓘ	Effective Date >
Additional Notification Recipients ⓘ	Additional Completion Recipients ⓘ >

Check Invitees

Stu Wood Edit Completion Email Edit Invitation Email Select Attachments

Enable SMS Notification
 Enable SMS Authentication
 Video Confirmation ⓘ

Enable IDCheck
 Review Before Signing

Face2Face Sign

Or in Form Direct select video confirmation

← Form Direct

1. Select your forms | 2. Invite | 3. Email Template | 4. Setup workflow | 5. Review

Due Date	29/10/2017 10:37 am			
Signer Type	First Name	Last Name	Email	Mobile
Candidate	Stu	Wood		

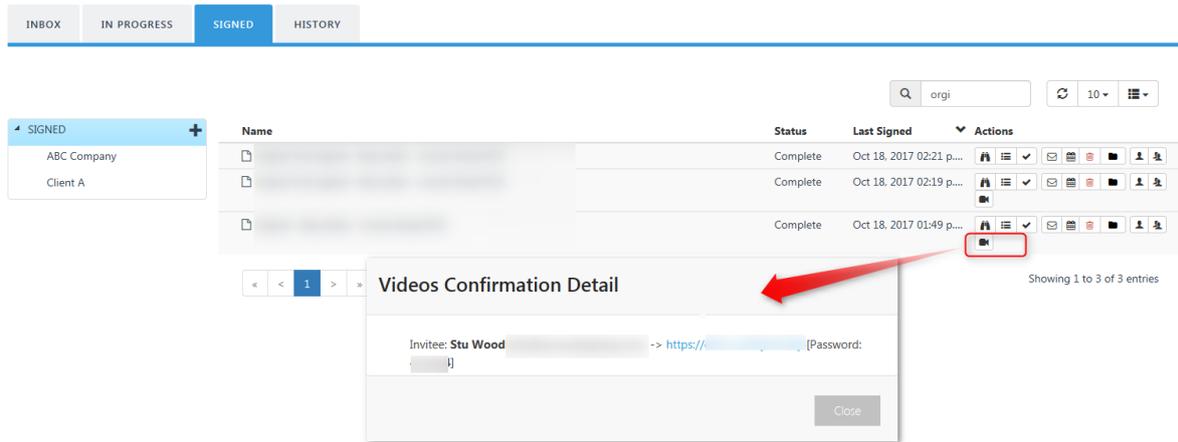
Video Confirmation

For more information on video confirmation watch these videos

1. Invite someone to sign with video confirmation
<https://player.vimeo.com/video/222296139>
2. Sign with Video Confirmation
<https://player.vimeo.com/video/222296536>

Please note, video confirmation provides extra security and assurance level. It provides additional evidence as to who was behind the device / keyboard in the signing process which will help in case of future dispute.

The document owner will be able to access and watch video from signed folder.



The signed document will have an additional page with video confirmation details. Anyone who holds the signed document is able to access the video.

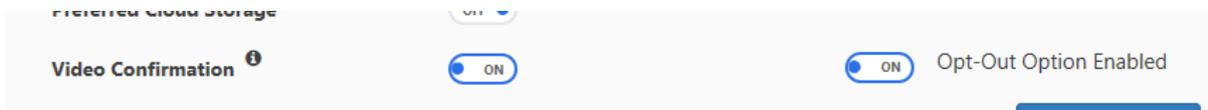
Video Confirmation

Invitee: Stu Wood, Video URL: https://[redacted], Password: [redacted]

Opt-Out Option

In case the signing process must have video confirmation, you can now set at the account level whether or not invitees are allowed to opt-out of video confirmation and continue to sign without capturing a video.

To make video confirmation mandatory; Go to My Account -> My Setting -> Set 'Opt-Out Option Enabled' to Off, meaning they are NOT allowed to sign without video confirmation.



Review Before Signing

If you need to ensure a document have been reviewed before signing, now you can with our review before signing capability.

To set it up in go to My Account My settings and enable review before signing.



Review Before Signing is an additional process that can be added to the signing process. The signer needs to wait some time before can scroll to bottom of the page and press continue.

If you select 'no wait', it means invitee can scroll down at any time and press continue.

This process is added to document log /document audit log which acknowledges the invitee has read the document.

Tick the Review before signing in Invitation workflow for each invitee which requires it.

Check Invitees

Stu Wood Edit Completion Email Edit Invitation Email Select Attachments

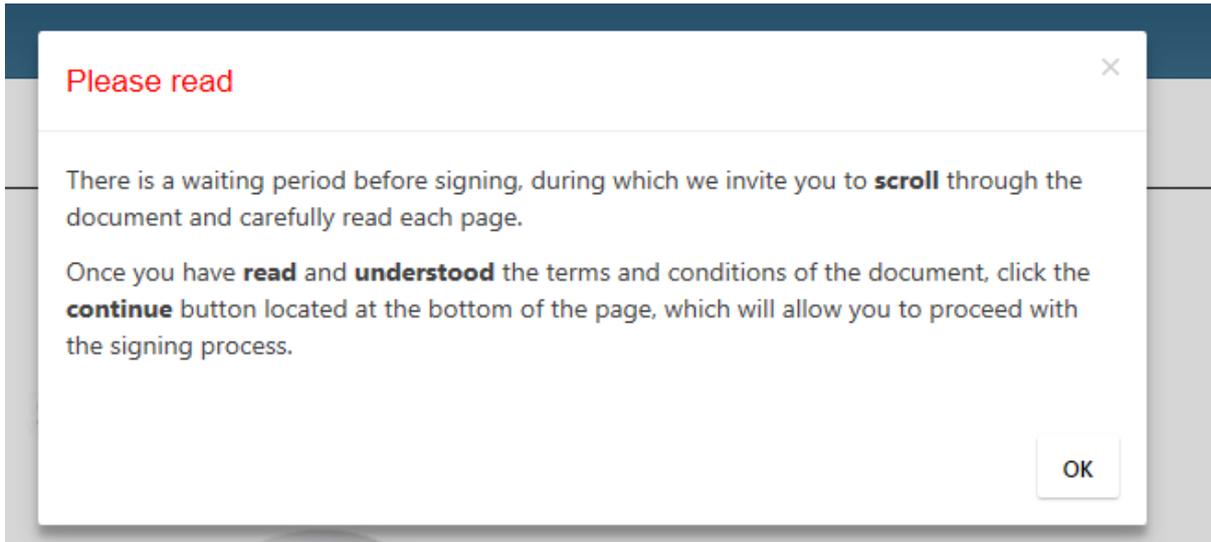
Enable SMS Notification Enable SMS Authentication

Enable IDCheck Review Before Signing Video Confirmation ⁱ

Face2Face Sign

Cancel Send

Signing process – Invitee will read the following popup instructions to read and scroll down to press continue



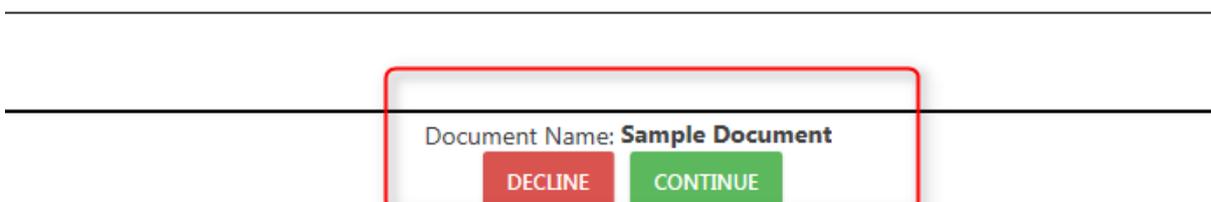
The most common selected wait time is 30 secs.

- Improve customer satisfaction
- Trusted digital signatures (PKI)
- Legally binding signatures
- Promote a Green business environment...

Thank you for choosing Secured Signing as your preferred digital signature solution



Invitee reads and ready for next step will press continue or disagree and will press decline. It will stop the process and notify document owner by email



In the document log you will be able to see when the invitee has reviewed the document before signing

Document Log for "Sample Document"

- [Redacted] WeSign Process Complete on 22 Oct, 2017 at 11:21:09 a.m. (GMT +13:00)
- [Stu Wood Signed Document on 22 Oct, 2017 at 11:21:09 a.m. \(GMT +13:00\)](#)
- [Stu Wood Reviewed contents of the document on 22 Oct, 2017 at 11:20:51 a.m. \(GMT +13:00\)](#)
- [Stu Wood Acknowledged the receipt of the document to review on 22 Oct, 2017 at 11:19:18 a.m. \(GMT +13:00\)](#)
- [Redacted] VeSign Invitation email sent to Stu Wood [info@securedsigning.com] for doc name: Sample Document on 22 Oct, 2017 at 11:17:25 a.m. (GMT +13:00)
- [Redacted] Started WeSign Process [Sequential: Off] on 22 Oct, 2017 at 11:17:24 a.m. (GMT +13:00)
- [Redacted] Invited Stu Wood on 22 Oct, 2017 at 11:17:24 a.m. (GMT +13:00)
- [Redacted] Sample Document Created on 22 Oct, 2017 at 11:14:00 a.m. (GMT +13:00)

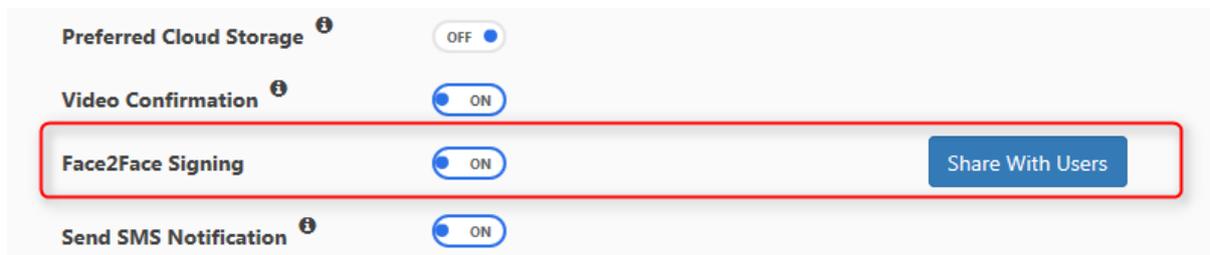
Face to Face (F2F)

At times, the invitee will sign document when they are physically next to document owner or needs to visit the company's branch. In F2F process no email invitations are sent out.

To improve security a SMS code will be sent to each invitee to access the document and initiate the signing process.

Please be sure you have SMS credit, you can buy SMS credit in My Account -> My settings.

To setup F2F in your account go to My settings and switch to On Face2Face signing.

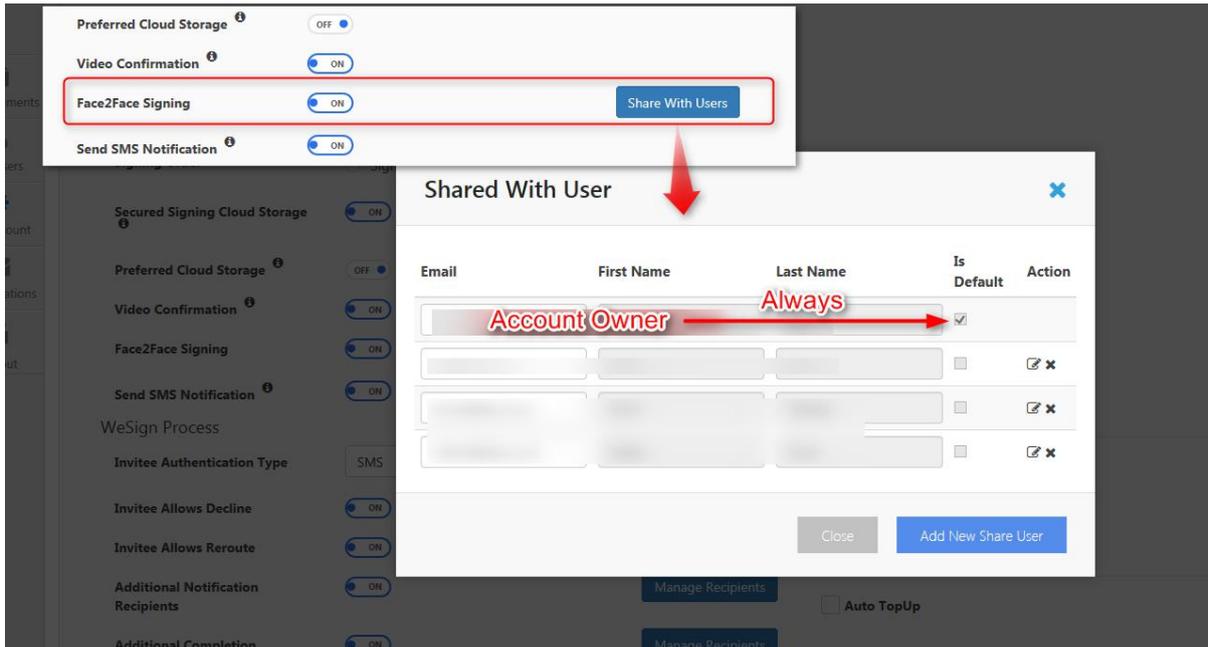


The screenshot shows a settings panel with four toggle switches and a button. The 'Face2Face Signing' toggle is highlighted with a red box and is currently turned 'ON'. The 'Share With Users' button is also visible next to it.

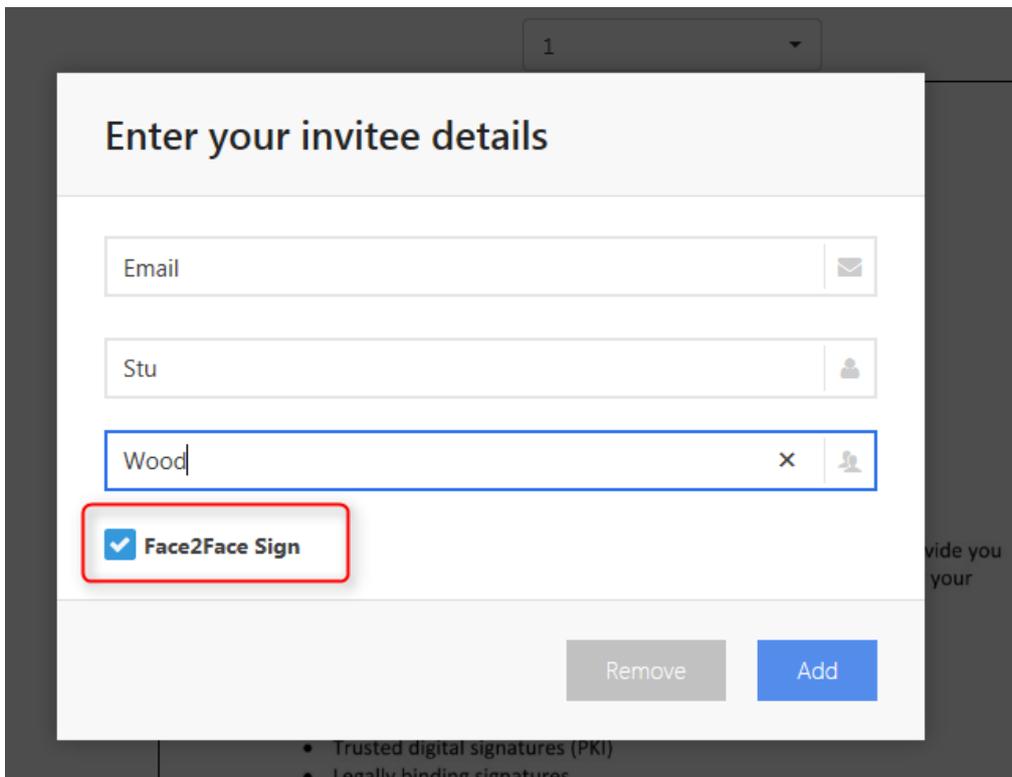
Preferred Cloud Storage ⓘ	OFF
Video Confirmation ⓘ	ON
Face2Face Signing	ON
Send SMS Notification ⓘ	ON

Share With Users

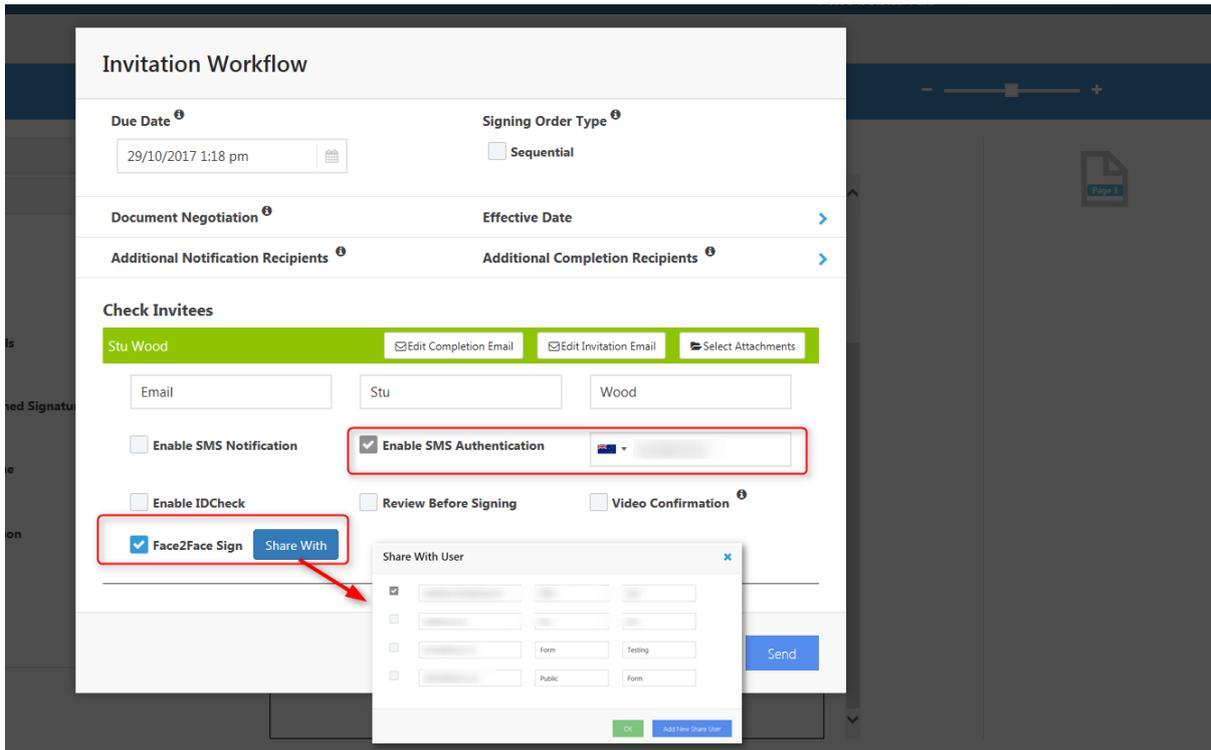
The F2F signing process / link can be shared with any Secured Signing Paid account users. To set it up click Share with Users, it can also be done later during the F2F invitation process.



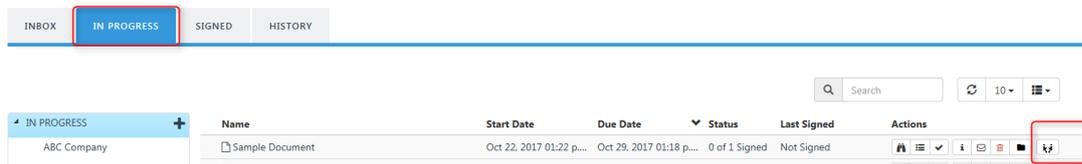
In We Signing Process, add invitee and tick F2F, email address is not required. However, if you enter an email address the signed document will be sent to invitee upon completion.



We Sign workflow invitation popup please enter the invitee mobile phone and select who you want to share the link with. You can add more paid account users to share with in this popup



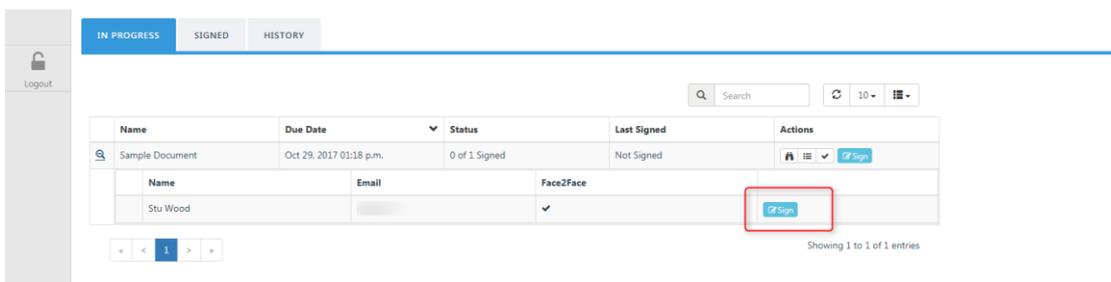
Document Owner / Account owner can access F2F signing process for this document from in progress tab and clicking on F2F icon



To access the document and sign invitee needs to provide the SMS code sent to his mobile phone.

Shared User in the F2F will receiving email notification to access this process. Invitee will get SMS code to access document and to sign.

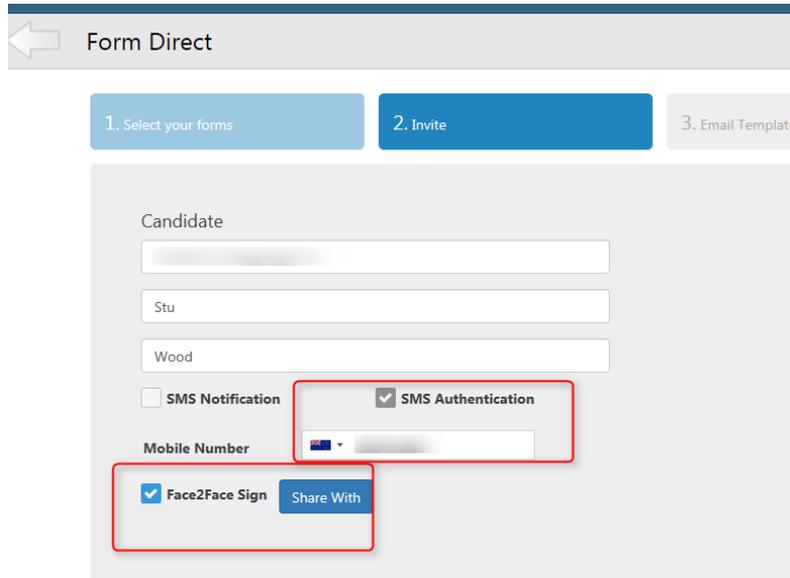
Shared user can login in F2F portal <https://www.securedsigning.com/Face2Face/Login> with his Secured Signing user ID and password.



Once click sign SMS code will be sent to Invitee Mobile Phone.

The F2F portal enables you to have a Tablet or Desktop at your office or reception. Invitees who are visiting your office can sign at the kiosk style process. The document owner is not exposing their desktop's data to any Invitee for signing.

F2F in Form Direct process tick the F2F for invitee, enter Mobile phone and share with other paid Secured Signing account.



Effective Date

The legal industry needs to enter contract effective date after all signers signed. Entering effective date can be done by account owner or by inviting the lawyer to enter it at the end of the signing process.

The lawyer or account owner have 7 days to enter the effective date once the signing process has been completed. Signers will receive email completion after the effective date has been entered.

Set up your account to enable effective date in My Account My settings.



In We sign process just tick enable effective date in the invitation popup and press send.

Invitation Workflow

Due Date ⓘ

Signing Order Type ⓘ Sequential

Document Negotiation ⓘ Enable (0 credits remaining)

Effective Date ⓘ Enable

Check Invitees

Stu Wood

Lawyer Test - Effective Date Stamper

Invitees will sign; once signing process has been completed Lawyer Test will receive email invitation to enter effective date.

The link in the email invitation will take the effective date stamper to a special process. Adding Effective Date stamp allows anywhere on the document.

with our signing online solution offering a number of great benefits for your business:

- Sign in seconds
- Save time and resources
- Improve customer satisfaction
- Trusted digital signatures (PKI)
- Legally binding signatures

Document Name: **Sample Document**

Then stamping by entering the effective date.

Click to Stamp

Sample document only

Please enter Effective Date ✕

Effective Date: 📅

STAMP

Thank you for your interest in Secured Signing. It is our pleasure to provide you with our signing online solution offering a number of great benefits for your business:

- Sign in seconds
- Save time and resources
- Improve customer satisfaction
- Trusted digital signatures (PKI)
- Legally binding signatures

Document Name: **Sample Document**
REMOVE EFFECTIVE DATE

After done all signers will receive email completion.

Account Owner can stamp / add effective date from signed folder after all signers have signed. He has 7 days to do so. However, because the effective date is not part of the We Sign process all parties will receive email completion once signed process has been completed regardless of the effective date process.

SIGNED
HISTORY

Effective Date

Q Search

🔄 10 ▾

	Name	Status	Last Signed	Actions
+	<input type="checkbox"/> Sample Document	Complete	Oct 22, 2017 02:04 p.m.	📄 ⌵ 📧 🗑️ 📧 📧 📧
	<input type="checkbox"/> Sample Document	Complete	Oct 22, 2017 11:21 a.m.	📄 ⌵ 📧 🗑️ 📧 📧 📧 📅
	<input type="checkbox"/> Acceptance of Quotation_Signed	Complete	Oct 21, 2017 09:18 a.m.	📄 ⌵ 📧 🗑️ 📧 📧 📧

Please keep in mind the effective date is a digital signature field with a signature. This way it ensures all remaining signatures are valid.

Display Name

To setup the display name in email invitation and instructions popup during signing process, login to you Secured Signing account -> My Account -> My Settings -> Display name -> change as needed, customised you can enter any display name -> Update My Settings. The default is common name – last and first name

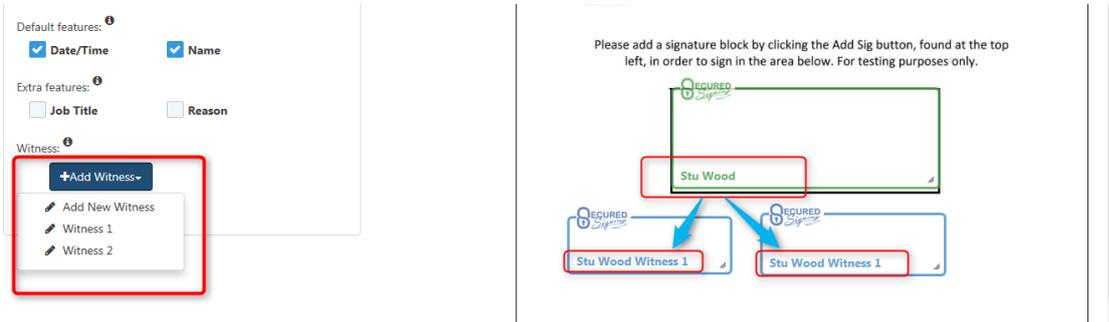
Witness

Now you can add more than one witness to same invitee. Just select the invitee and add a witness

Witness has same security level as invitee. If the invitee has Video Confirmation or SMS authentication the witness will use same level for completing the signing process.

Multiple Witness Signatures

At times a witness signature is required in several positions throughout a document. Now you can add multiple number of signature fields in a document for the same witness.



The witness will receive one email invitation with one link to sign multiple signatures.

Witness Rules

Who can be a witness?

- A witness can be any person who is not one of the invitees. Simply enter the witness's email address and first and last name.
- In situations where more than one invitee needs a witness, the same person can act as witness for both invitee's/signers.
- The witness will get email invitation from each invitee to witness the signing process.

Document Library

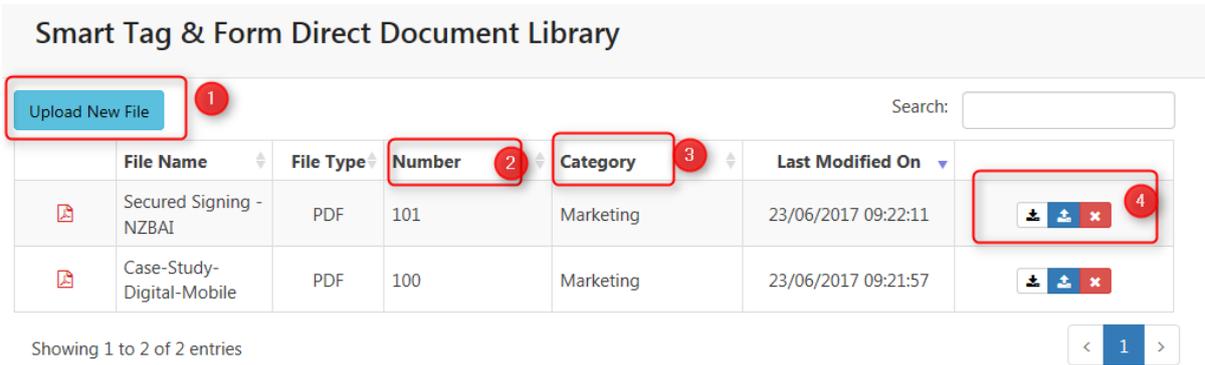
At times the document owner will need to add additional attachment to email invitation, most likely these attachments are marketing flyers of polices or guidelines. You can do it with Secured Signing at no extra cost.

You can add to email invitation one off document from your desktop or upload these files from document library to every invitation, simply select from the list.

First enable document library in My Account -> My Settings

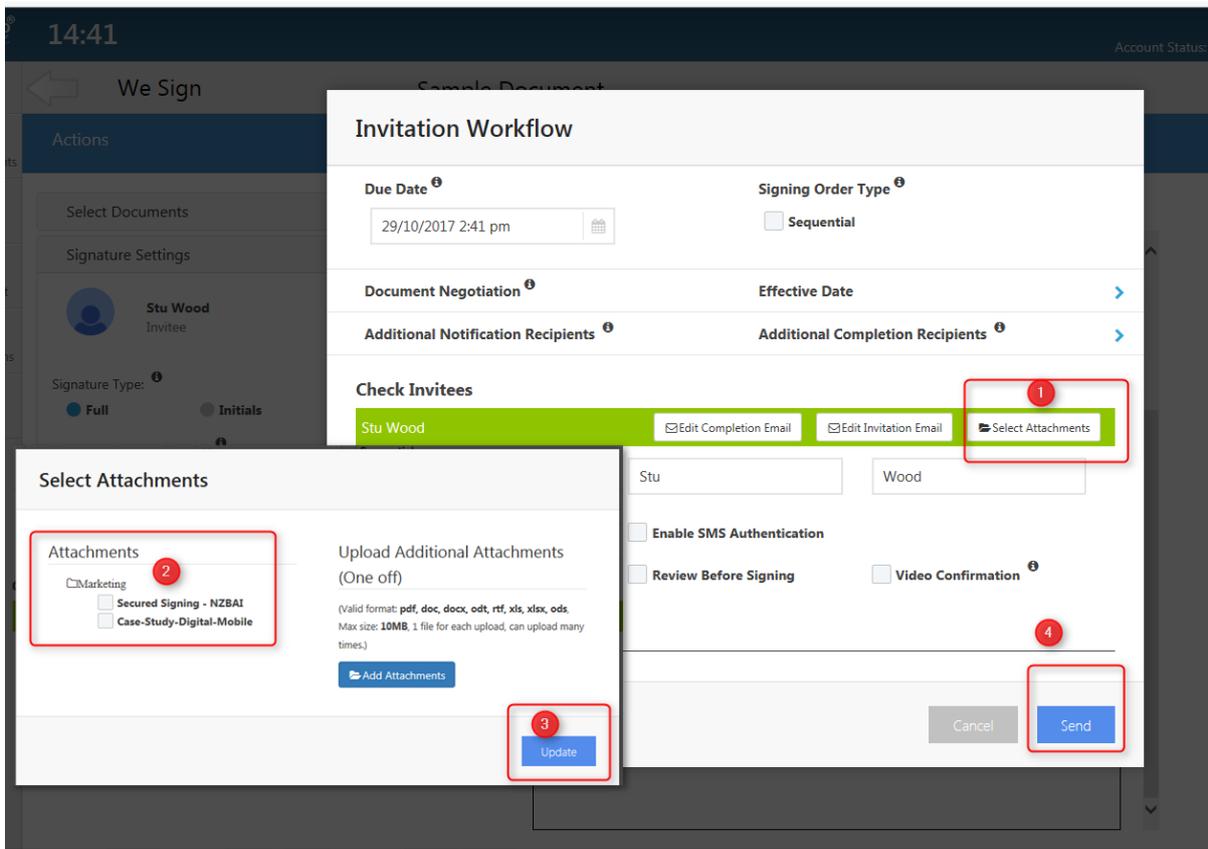


To manage and upload documents to document library click manage document library.



1. Upload new document to library
2. Enter unique 3 digits number to identify the document in the library, and then you will be able to use it in Smart Tag process.
3. Use category to group document in a group. You can select the group from smart tag.
4. Maintenance for existing documents in the library, download, replace, and delete.

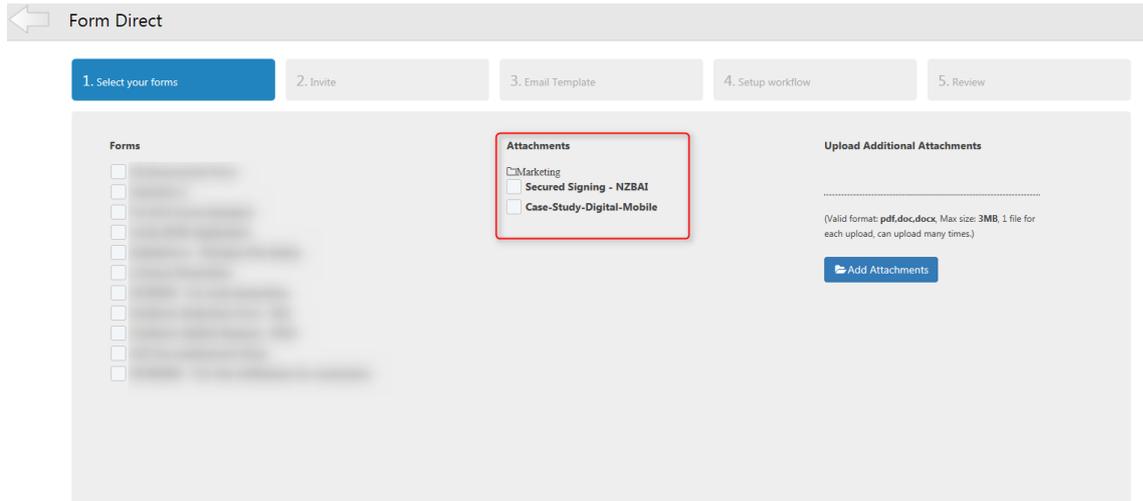
In We sign process



In Form Direct process, first be sure in the My Account -> My Settings it is on

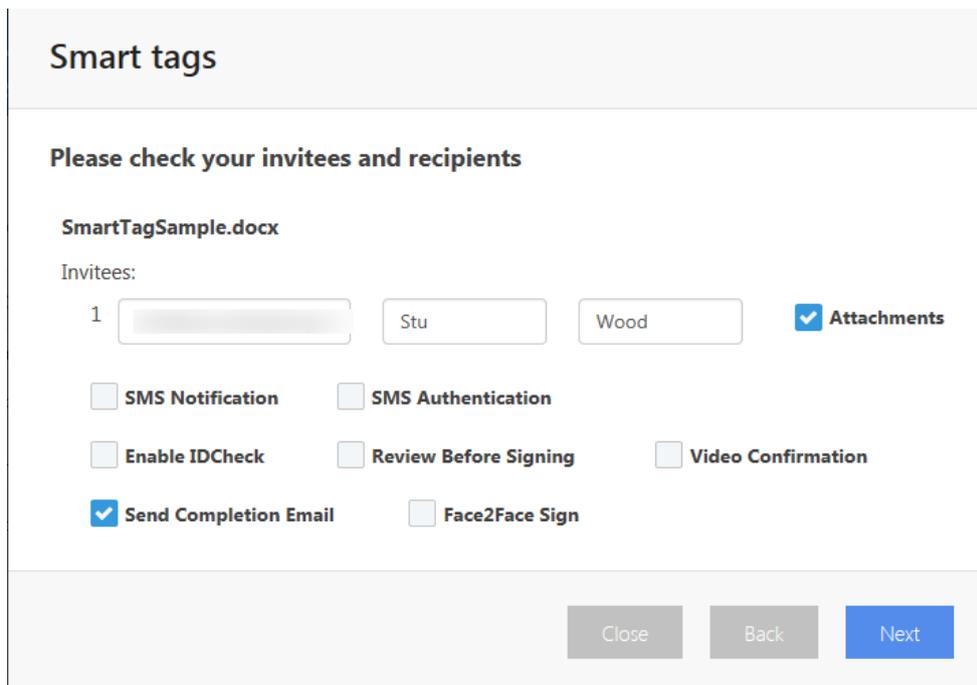
Select the forms and the documents attachment from appropriate list.

And then send.



Smart Tag Document Library

In Smart Tag you can tick the attachment next to invitee



Then select the document from document library and press next

Smart tags

Please select any additional attachments

Attachments

- Marketing
 - Secured Signing - NZBAI
 - Case-Study-Digital-Mobile

All Invitees Use Same Attachments

Upload Additional Attachments
(One off)

(Valid format: **pdf, doc, docx**, Max size: **3MB**, 1 file for each upload, can upload many times.)

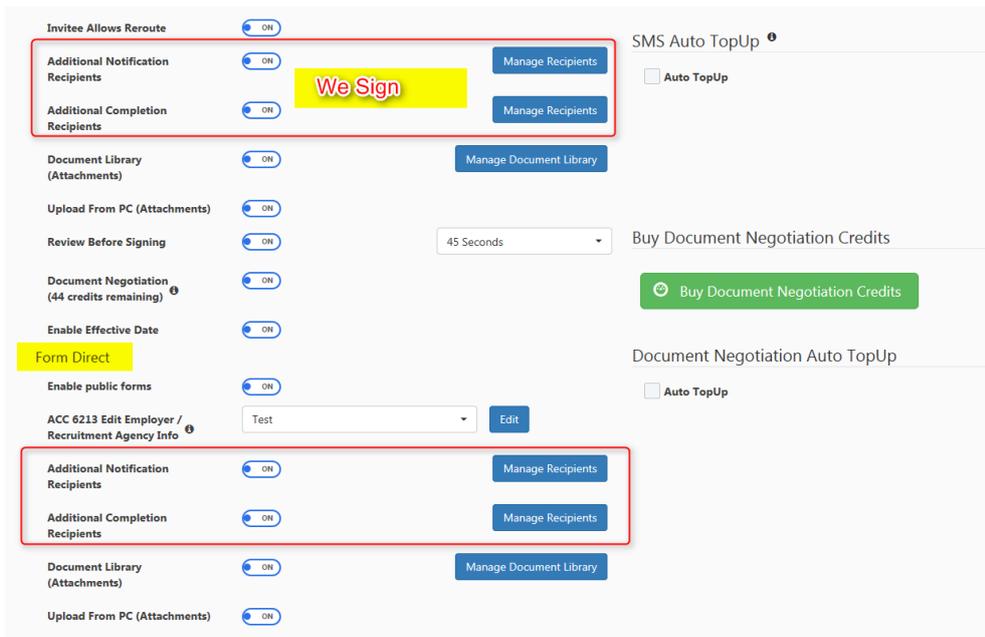
To automate this process from the smart tag, please have a look at our Smart Tag Guide at <https://ds.securedsigning.com/support/demo-assets/Smart%20Tag%20Guide.pdf>

Additional Notification

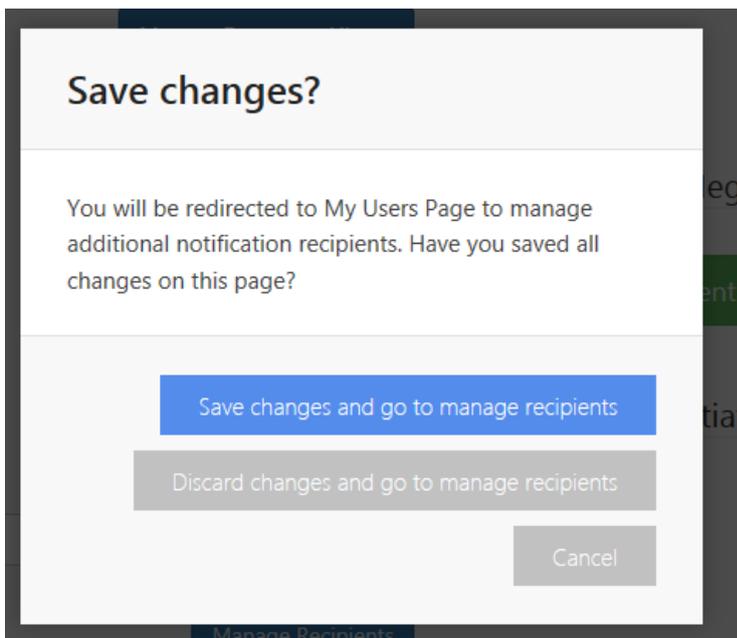
Secured Signing supports additional notification system, to notify additional people of the signing process, even when they don't need to sign at all.

For example, additional notification recipient can be your manager who should be notified the contract has been sent for signature, possible you want to add you manager as a reviewer or notify the legal team at the completion of signing process.

To set it up login to your Secured Signing account -> My Account -> My Settings -> Switch on Additional notification recipients and additional completion recipients in We Sign and Form Direct as needed.



Click manage recipients



Click on the blue button to manage or add new additional recipients.

Notification Portal

The notification portal provides notification recipients with an 'at a glance' overview of the signing progress. This includes document details, signing status and the date of last action along with options to drill down to see document content and the document log.

Action buttons are also provided to review and sign the document where appropriate. You have complete visibility of progress without the need to contact the document owner for updates.

Additional Notification Recipients

Adding additional recipients is a great way to keep people who aren't signing the document up to date with the signing progress. Notification recipients have visibility of the signing process from the start.

In We Sign process

Invitation Workflow

Due Date ⓘ

Signing Order Type ⓘ

 Sequential

Document Negotiation ⓘ

Additional Notification Recipients ⓘ

 Enable View/Manage 1 Selected.

Effective Date >

Additional Completion Recipients ⓘ

 Enable

Check Invitees

Stu Wood

Enable SMS Notification

Enable SMS Authentication

Enable IDCheck

Face2Face Sign

Review Before Signing

Video Confirmation ⓘ

In Form Direct

← Form Direct

1. Select your forms

2. Invite

3. Email Template

4. Setup workflow

5. Review

Due Date ⓘ

Additional Notification Recipients ⓘ

 Enable View/Manage 1 Selected.

Additional Completion Recipients ⓘ

 Enable

Signer Type	First Name	Last Name	Email	Mobile	Video Confirmation
Candidate	Stu	Wood			<input type="checkbox"/>

Additional Recipient is receiving email notification notifying them when the signing process has begun. They can login from email or directly from the notification portal at <https://www.securedsigning.com/Recipients/Login>

The document can be signed at the notification portal if the invitee provides the document access code.

Reviewer

Adding one or more reviewers to your signing workflow captures the approval of a manager or advisor in the document log. Reviewers are invited to read and approve or reject the document before the signing process starts. Including reviewers in the signing workflow

removes manual pre-approval processes and ensures the signing process starts the minute approval is granted.

Select Notification Recipients

[Redacted]

Reviewer

info@securedsignin... Stu Wood Enable Reviewer

[Redacted]

Reviewer

[Redacted] David Wood

Reviewer SMS Authentication

[Redacted] Stu Wood Enable Reviewer

[Redacted]

The reviewer will receive an email notification to review the document first. Review can be set at the document level and at the invitee level reviewer can login from the notification portal to review many documents at <https://www.securedsigning.com/Recipients/Login> or access from email notification.

If the reviewer approves the document, then the signing process will continue. If the reviewer has declined the document, the document owner will receive an email notification and the signing process will stop.

The reviewer will be able to review document at notification portal

IN PROGRESS					SIGNED	HISTORY
Sample Document	Oct 29, 2017 03:44 p.m.	0 of 1 Signed	Not Signed	Actions		
Name		Email				
Mike [Redacted]	[Redacted]			<input checked="" type="checkbox"/> Follow		
Stu Wood	[Redacted]			not yet		
Sample Document	Oct 29, 2017 03:42 p.m.	0 of 1 Signed	Not Signed	Actions		

Showing 1 to 2 of 2 entries

Additional Notification Completion

Completion recipients receive a copy of the completion notification including a copy of the signed document.

In We Sign Process

Invitation Workflow

Due Date [?]

Signing Order Type [?] Sequential

Document Negotiation [?] **Effective Date** >

Additional Notification Recipients [?] Enable

Additional Completion Recipients [?] Enable [View/Manage](#) 1 Selected.

Check Invitees

Stu Wood [✉ Edit Completion Email](#) [✉ Edit Invitation Email](#) [📎 Select Attachments](#)

Enable SMS Notification Enable SMS Authentication

Enable IDCheck Review Before Signing Video Confirmation [?]

Face2Face Sign

In Form Direct

Form Direct

1. Select your forms 2. Invite 3. Email Template 4. Setup workflow 5. Review

Due Date

Additional Notification Recipients [?] Enable

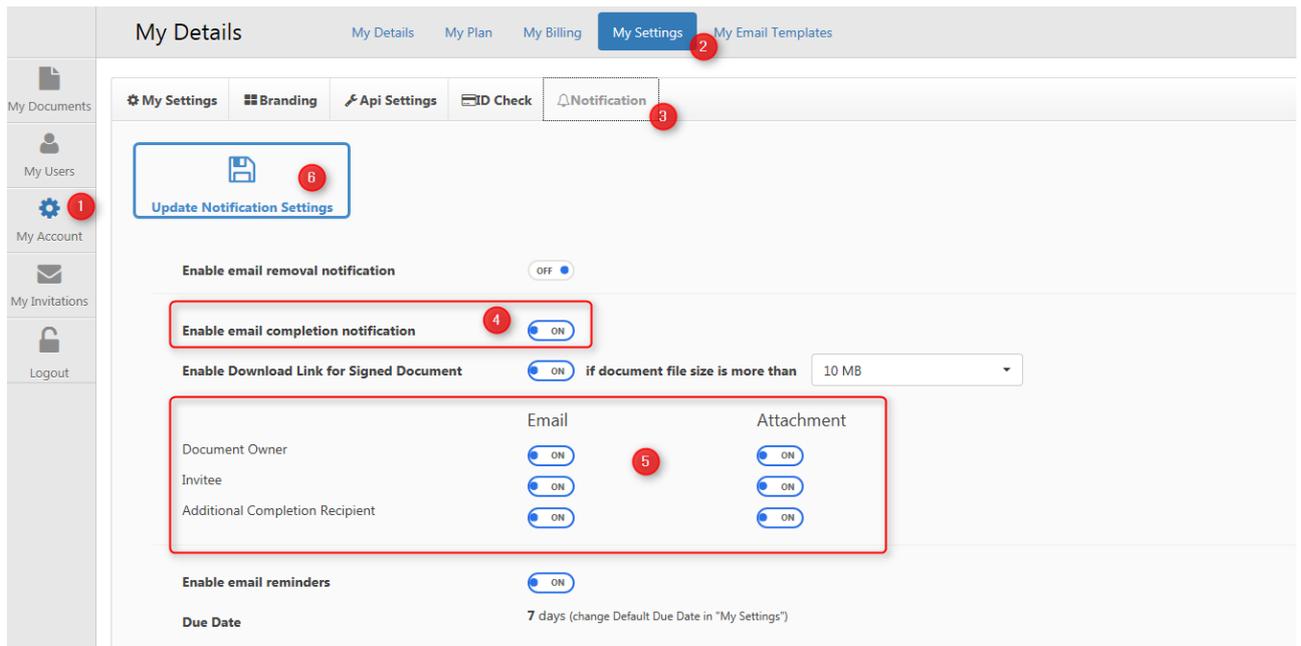
Additional Completion Recipients [?] Enable [View/Manage](#) 1 Selected.

Signer Type	First Name	Last Name	Email	Mobile	
Candidate	Stu	Wood			<input type="checkbox"/> Video Confirmation

Email Completion Set Up

Secured Signing supports email completion set up. You can select which party will receive email completion and who will not. Also, you can define if they email completion notification will include the document attachment or not.

To do amend the settings for email completion notification, login to your Secured Signing account -> My Account -> My Settings -> Notification -> enable email completion then to set who is entitle to receive completion email and whether it should be with or without attachment.



Enable Download Link for Signed Document

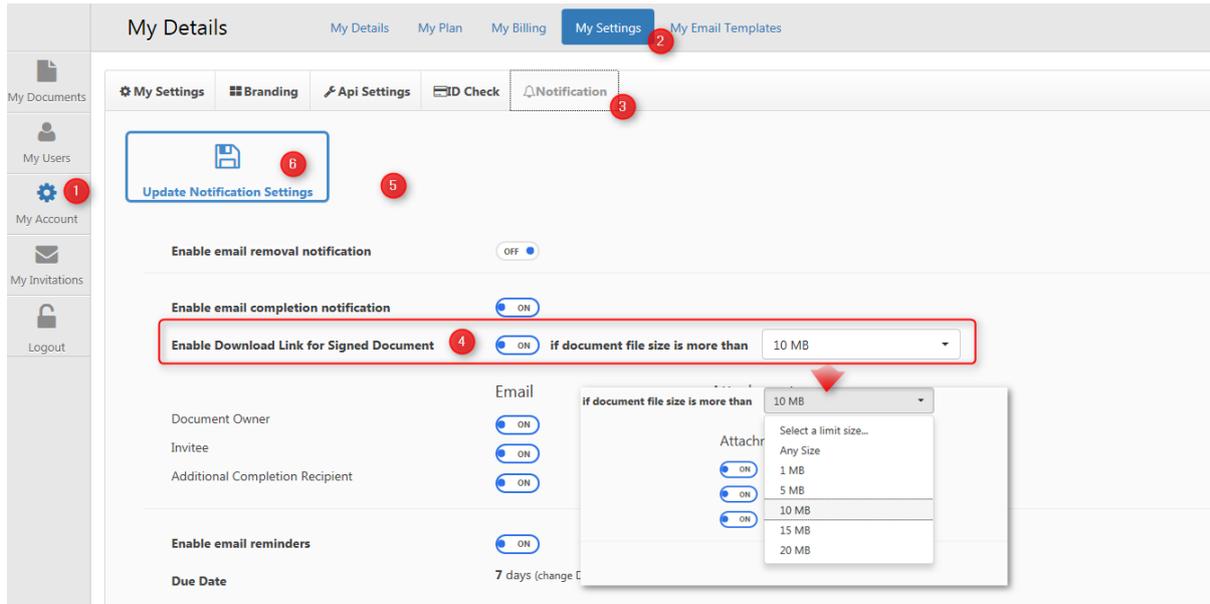
At time the signed document will be very large its possible many email services will block sending email with large attachment.

Otherwise you might not want to send signed documents as attachment in email for security reason.

For the above reasons we offer the option to have a link included in the completion email which will take you to download the file. Rather than having the signed document as attachment.

To action this, In My Settings select file size to any size, every email completion will have the link to download.

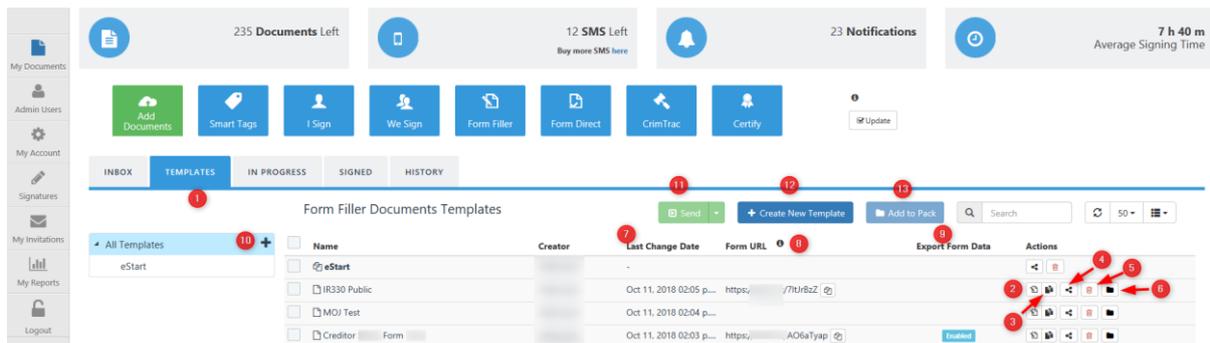
A security code for download the signing document will be provided in the email completion, To download the document enter the passcode in the email or the SMS code you received before to access signing process.



Form Filler – Templates

Templets Management – Grid

The secured signing dashboard has a new tab called Templets, in this tab you can manage your templates and send them out for fill-in and signing



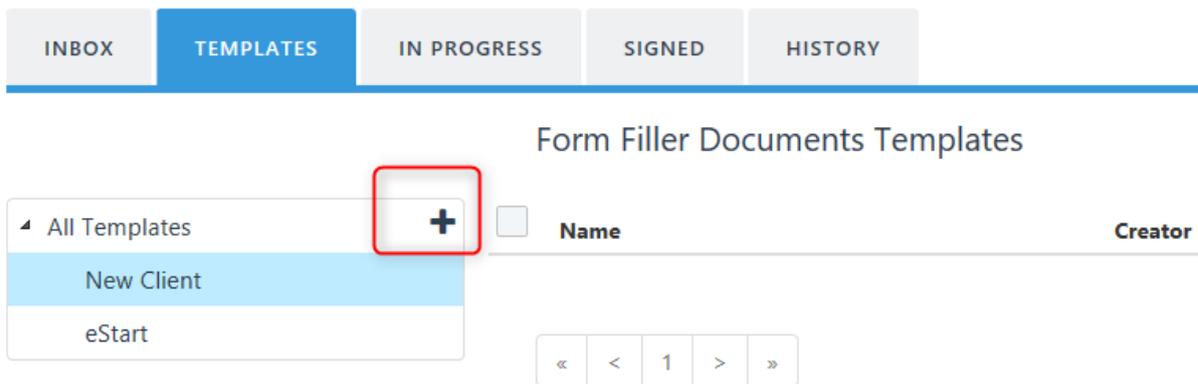
What includes in the template’s management grid

1. Template management tab
2. Edit or View your template – go to design mode
3. Replace your template document – the document has some text changes, but forms fields remain as is, you can replace the document and keep all form fields layout
4. Share you template – with other users in your account- available only for admin user
5. Delate template - if shared delate for all users

6. Add template to a pack – Create a pack and add the template to a pack, it also remains as standalone template
7. Last change date – Template save date, grid template order sort by last date saved at the top.
8. Form URL – available for form Templet with 1 signatory, URL can copy from the grid
9. Export Form Data – if it available for this form enabled will appear
10. Add new Pac – Create a set pack of documents templates.
11. Send – send Template, set pack or package for signature, you can send or send with review the template before sending out
12. Create new template – upload a document or select from inbox and once uploaded it will take you to Form Filler designer
13. Add to a Pack – select a template from the grid and add to a specific pack

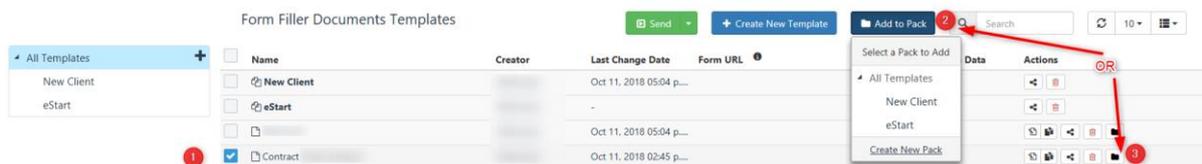
Create Templet Pack

You can create a pre-set pack of selected templates.



Click on the + to create new template.

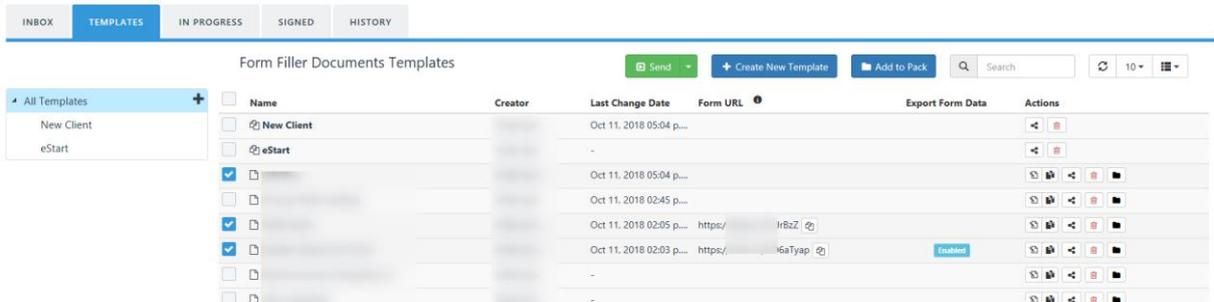
Then in the grid select templates you want to add to each pack.



Select entire pack or any template from the list

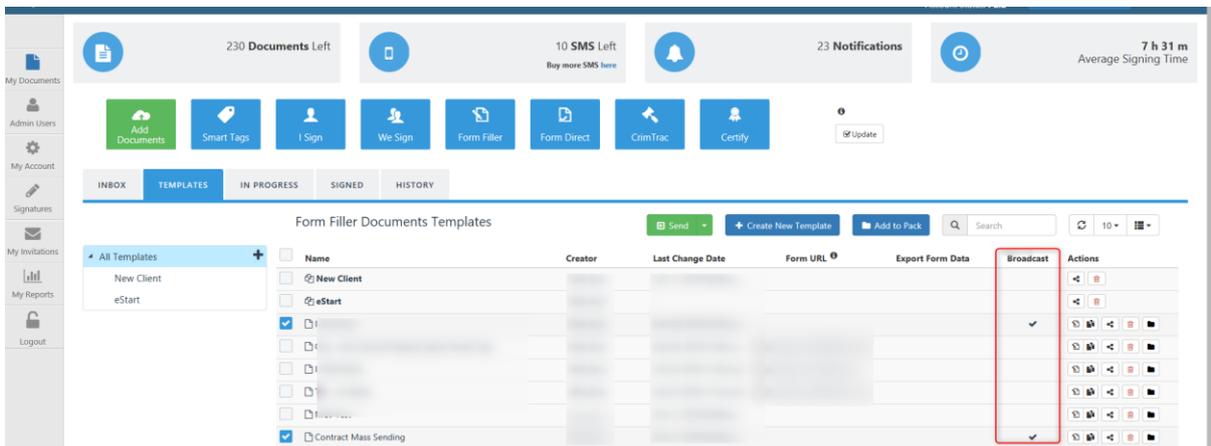


Send Templates in a package



Select the template from the grid and press send, enter invitee details and send.

Send Broadcasting Templates in a package

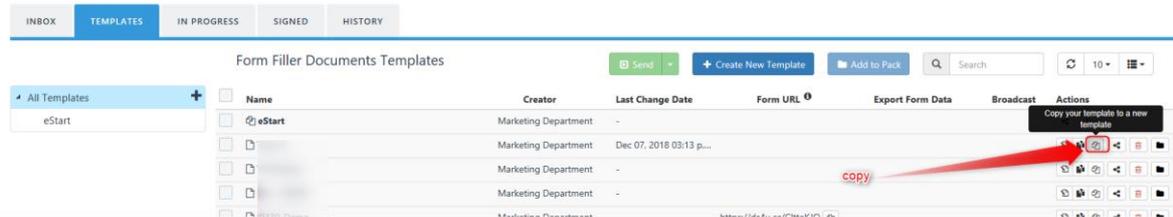


Send a package for broadcasting template only. Don't mix templates without broadcasting function.

Enter invitees list and each of them will get the package to fill-in and sign.

Copy as new Template

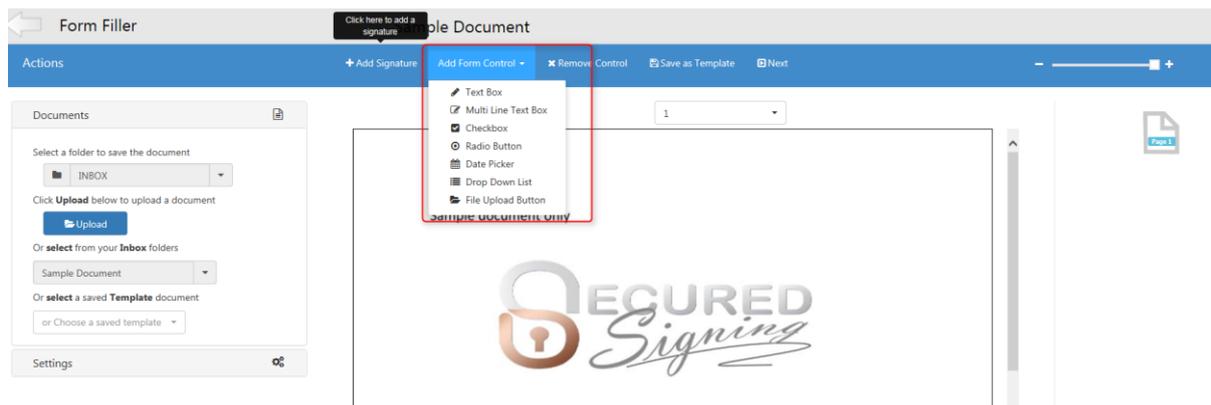
Sometimes you want to have few templates for same document with some minor changes. Copy existing template to a new template, give it a new name with one click



Form Filler - Template Designer

Additional Controls Fields

There are many new fields you can now use. Upload your current form and design your online approach for invitee to fill-in and sign.



Additional features include:

- **Text Box** – Free Text
- **Multi Lines Text Box** – Add a box for invitee to fill-in multi lines for large amount of text.
- **Checkbox** - Ticked the box
- **Radio Button** – Create a radio button group with any number of buttons to select from, can be in anywhere on the document
- **Date Picker** - Add date control to select a date
- **Drop down list** - Text fields with predefined selection list to select from
- **File Upload Button** - Invitee will be able to upload document's files or images / pictures to support form application

While you are designing your form, the system will save the form automatically every few minutes to a temporary draft. This means your designed form does not disappear, even if your session has timed out.

We still recommend for you to manually save to template when you can.

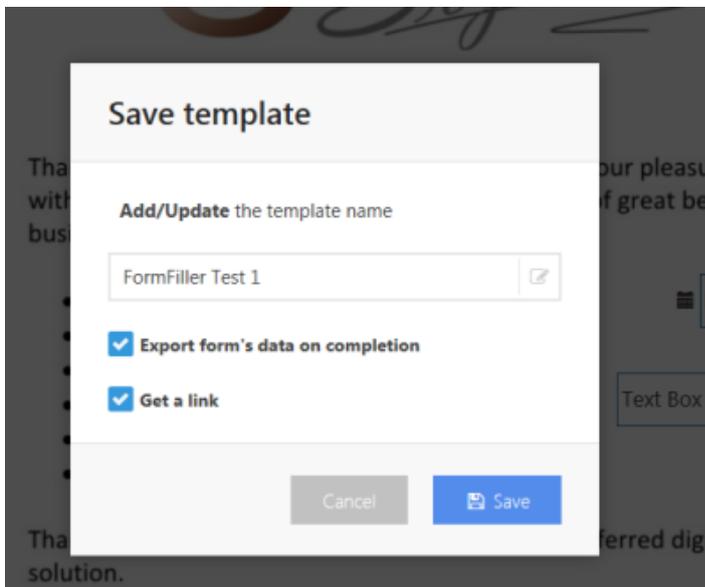
Look at our video for further assistance:

1. Preparing a form <https://player.vimeo.com/video/117557642>
2. Fill-in Form and sign <https://player.vimeo.com/video/117557641>

Publish a link to web site

If you have only one signer for a document, you can get setup a link to this form and publish it on your website.

Form filler supports form filling initiation from your website, save the form filler template and tick the box to get the link.

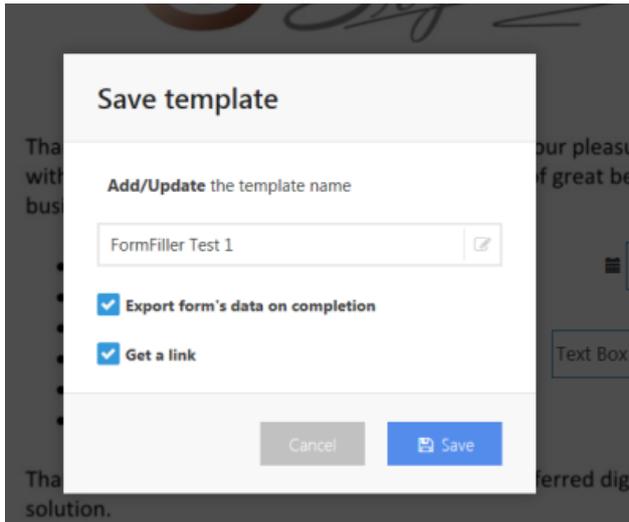


Once the form filler fill-in is available on your website, invitee click to sign, and an authentication code will be sent to the invitee's email address, signing process will be completed only by invitee has entered the code.

Export Form Data

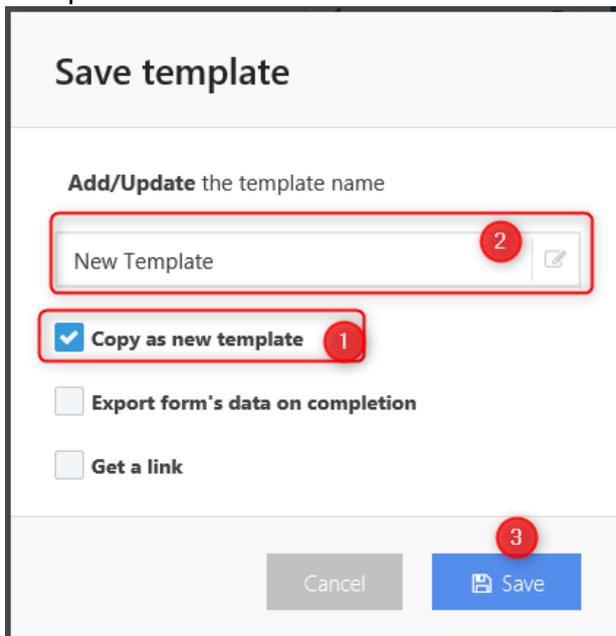
Export Form's fields' data to a file:

Document owner will receive a CSV file in the email completion with the signed form. The data file can be import to any system to avoid double entry of data.



Copy as new Template

You may need multiple templates for the same document with some minor changes. Copy existing template to a new template with just a click, while saving the template create new a name, and from now on you have 2 templates.



Form Fields Validation Rules

Add Form fields with business rules validation.

- Required or optional fields to be fill-in by invitee

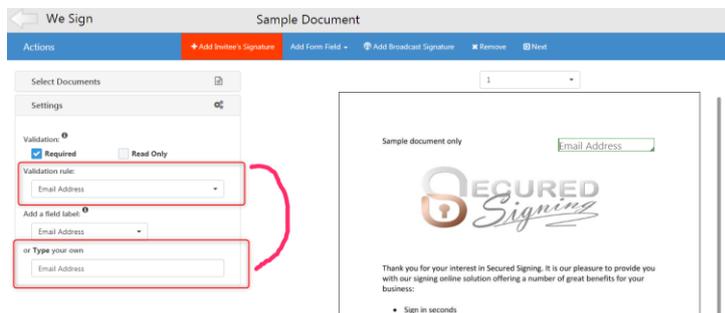
- Read only – invitee can't edit this filed, fill-in by document owner.



There are more validations rules. Data fill-in has to match the rule.

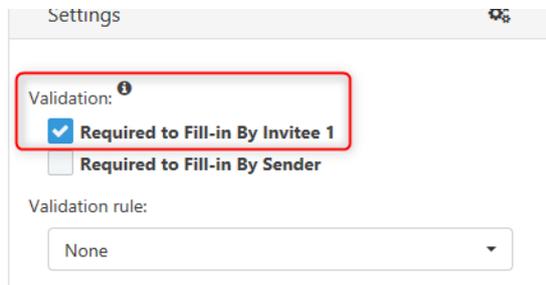
- Email address
- Website address
- Numeric only field
- Characters only field
- NZ Bank account format
- NZ IRD Number
- AUS TFN – Tax Declaration Number
- AUS ABN
- Credit Card number
- Credit Card Expiry Date
- NZ ZIP Code (Postal Code)
- AUS ZIP Code
- UK ZIP Code
- NZ Phone Number
- AUS Phone Number
- Phone Number

In case the field is mandatory invitee must to enter the right data to pass the validation before invitee is able to sign. Also, the field label set as rule validation, you can edit the label



Required to Fill-in by Invitee or Sender

While designing the form fields you can select who need to fill-in each field. Invitee click on the email innovation link that will take him to access form and fill-in as required. The form filling can be done by invitee 1 / first invitee to be fill-in and sign. All other invitees will be able to sign only, due to Digital signature technology the is sealed the document with first signature applied.



Settings

Validation: ⓘ

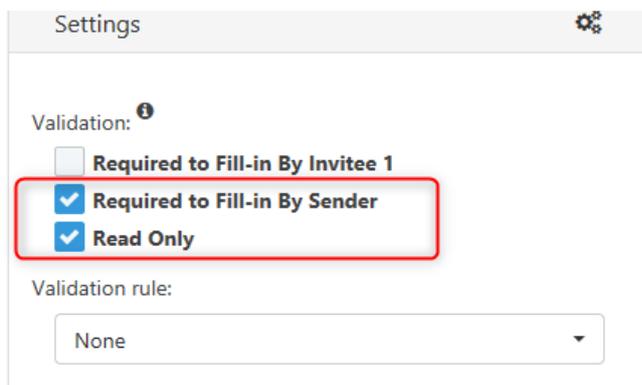
Required to Fill-in By Invitee 1

Required to Fill-in By Sender

Validation rule:

None

Sometimes sender needs to fill-in the form before sending out, ticked Required to fill-in by sender for each field that needs to be filled by sender.



Settings

Validation: ⓘ

Required to Fill-in By Invitee 1

Required to Fill-in By Sender

Read Only

Validation rule:

None

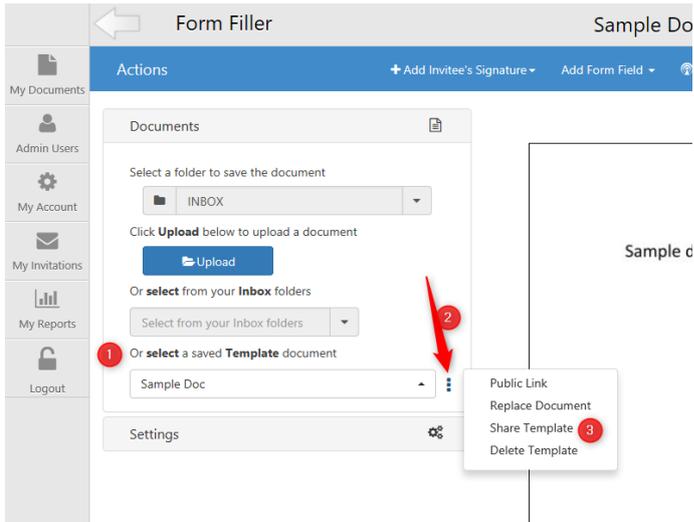
Sender entered the invitee's information and then the system will take him to form filling process, once done click send, to submit the form to invitees.

In case of Read Only ticked, invitee 1 can't enter any value in this filed.

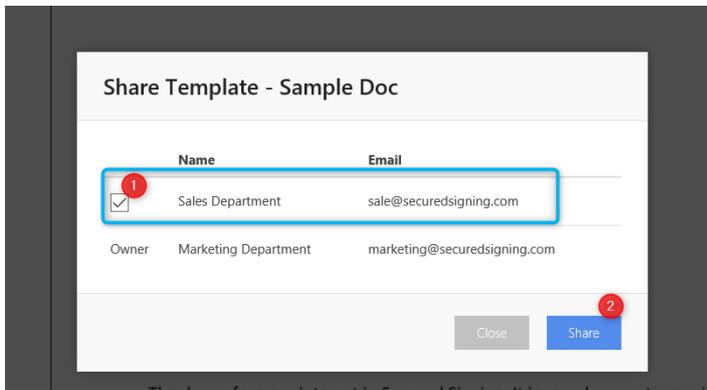
Share Template

Admin user can share templates with other user in the Secured Signing account.

You can share directly from Form Filler page while creating the template.



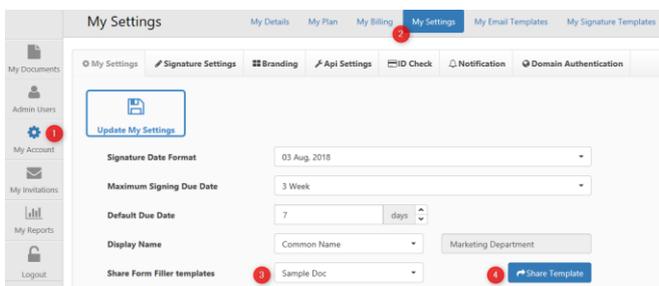
Then select the user you want to share with.



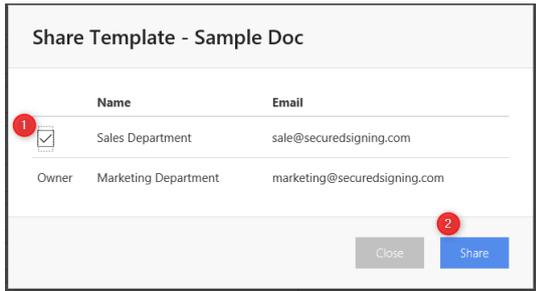
Once done the other user will be able to view this template in their template list.

Please note: any change to the template by any shared user, all these users who are using the template will see the change.

If the template was created by standard user and this template needs to be shared with other users in the account than the account admin user will need to share the template with all other users. This can be done at My Account -> My Setting



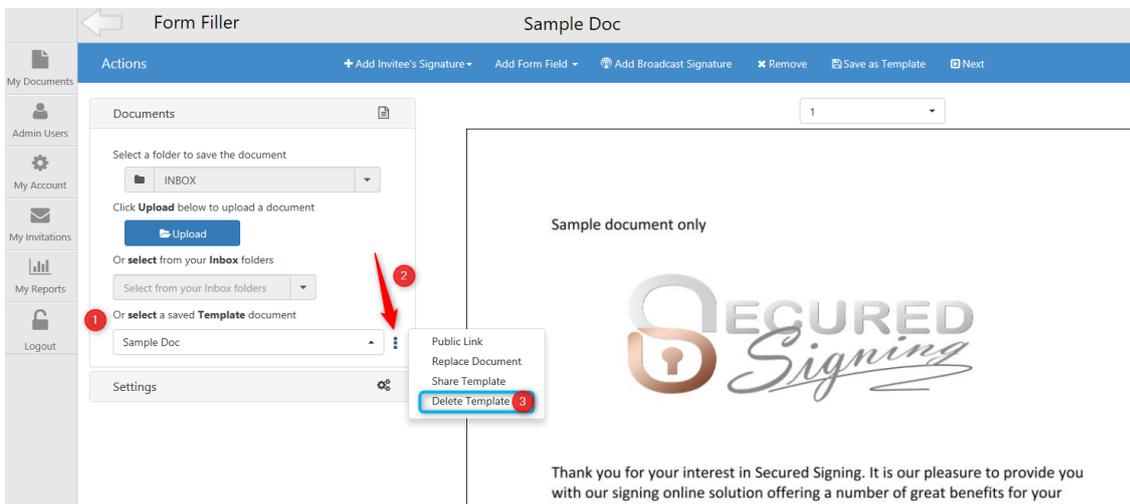
And then select the user to share with and press share.



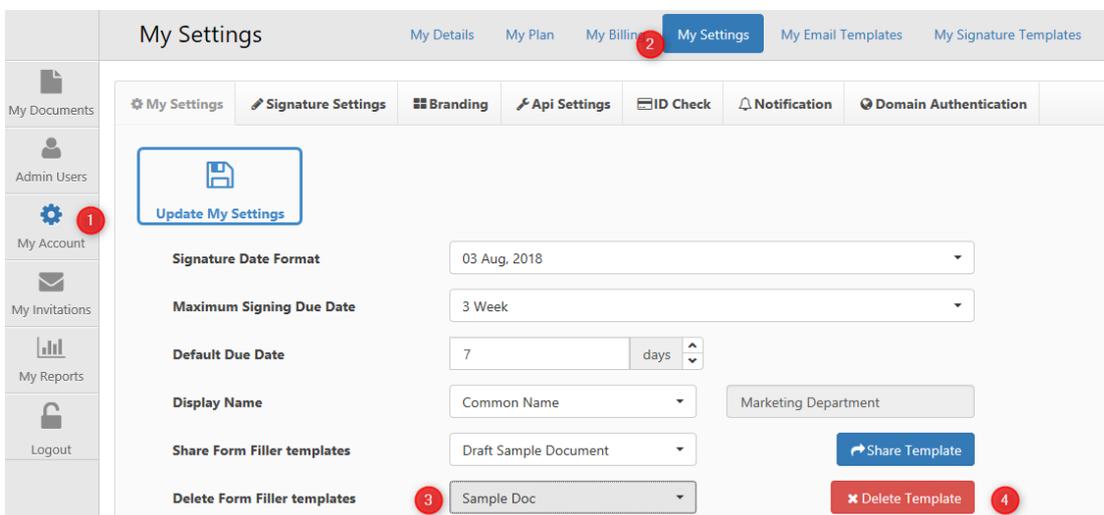
Delete Template

You can delete the saved templates from your Form Filler template list.

See image below for steps to action deletion.

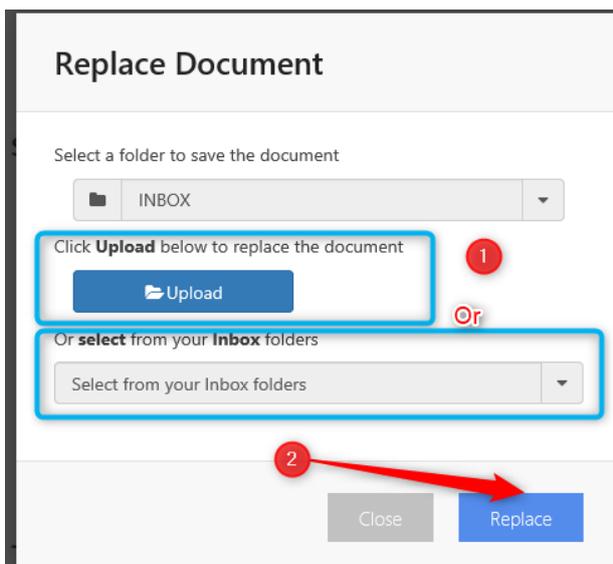
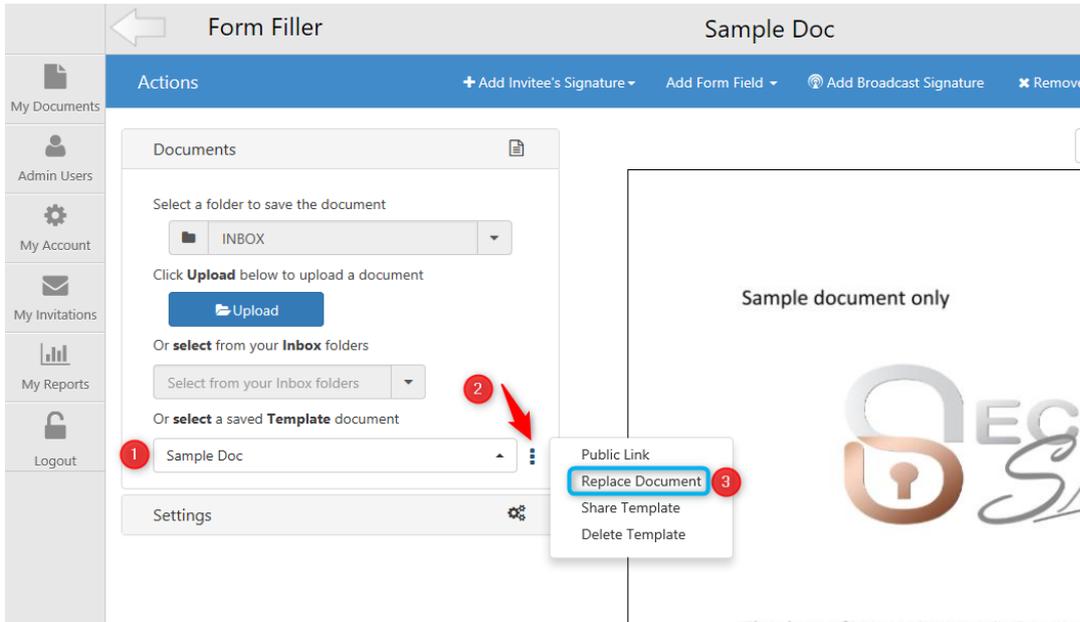


Account admin user can delete templates for all users from My Account -> My Setting. See instructions below:



Update Existing Templates

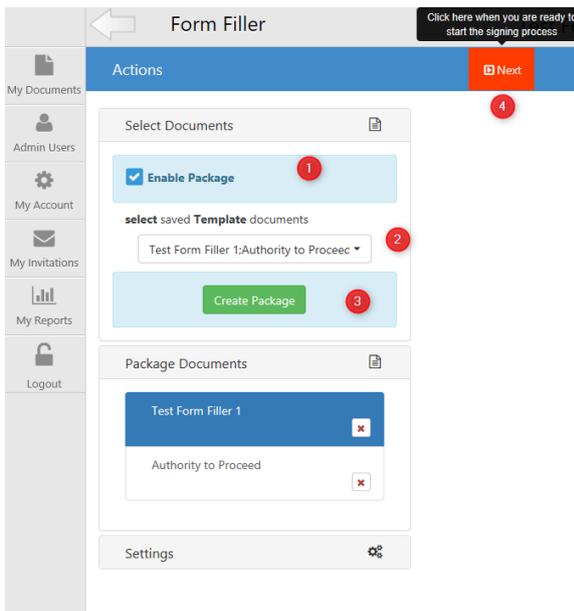
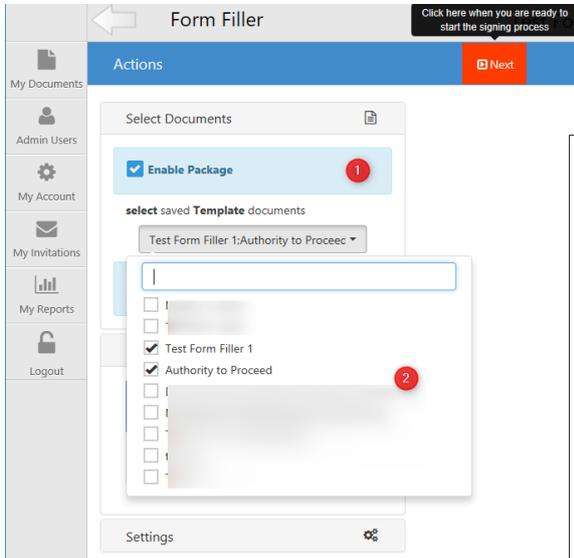
If you need to amend any text changes to an existing template, you can Edit the document at your system upload the new version and replace the existing document template, all fields will apply to the new document.



Once document replaced templet is ready to use.

Send Templates in a Package

You can combine several templates to create a package to be signed. In Form Filler, click to enable package and then select for the list to create the package.



Enter the invitee details per document and press send.

Then manage the signing process in IN Progress Tab

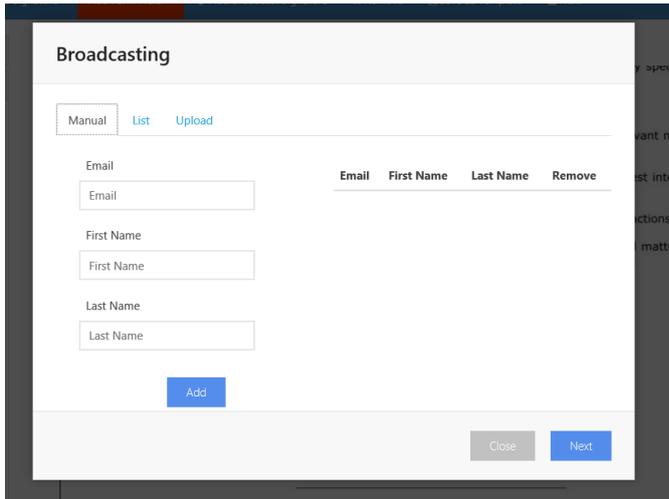
Name	Invitees	Start Date	Due Date	Status	Last Signed	Actions
Document Package 0927 Aug 6, 2018	Sbu Wood	Aug 06, 2018 09:28 a.m.	Aug 13, 2018 09:27 a.m.	0 of 2 Docu...	Not Signed	[Icons]
Test Form Filler 1	Sbu Wood	Aug 06, 2018 09:28 a.m.	Aug 13, 2018 09:27 a.m.	Filling	Not Signed	[Icons]
Authority to Proceed	SSL TEST	Aug 06, 2018 09:28 a.m.	Aug 13, 2018 09:27 a.m.	Filling	Not Signed	[Icons]

Add Broadcasting Signature

Create a template that can sent out to many signers, for each to sign their document.

Add broadcasting signature on the document as below

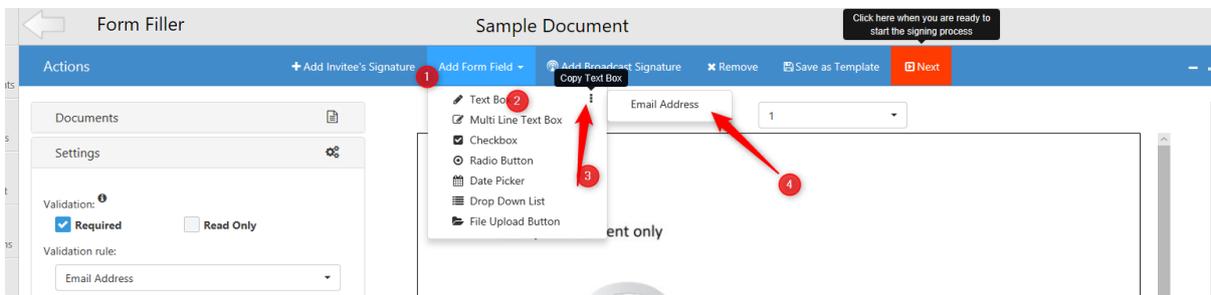
Create your invitees list



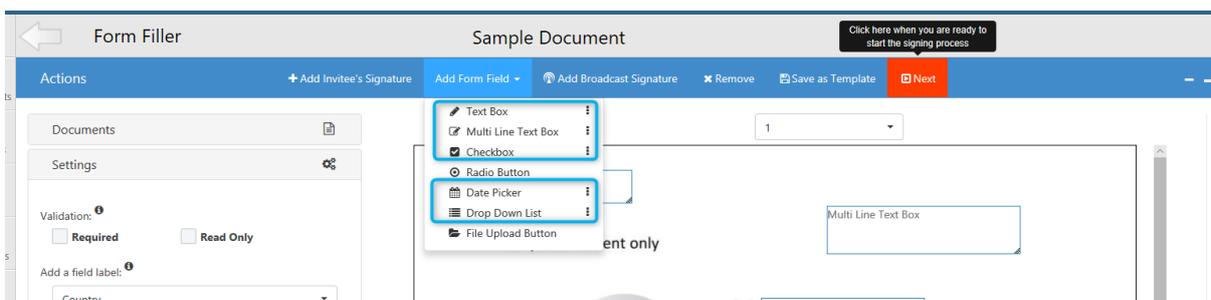
Copy Fields

In some forms, the same fields are duplicated in different places. Now you can copy existing fields and position it again anywhere on the template.

Once the invitee has filled-in the first field, the same value will appear on all copy fields with the same field label.

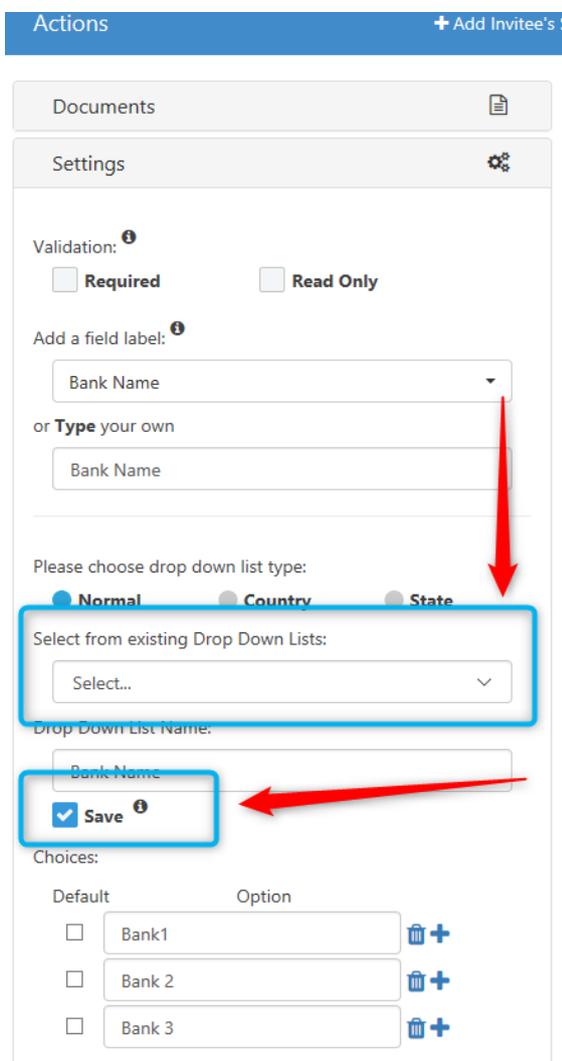


You can copy fields such as: text boxes, Multi Line Text Box, Checkbox, date picker and drop down menu.



Save Drop down list across forms

As you create your templates, you might choose to build specific fields for your forms. You have the option to save your fields and add them to a drop-down menu. This way you can simply select them again.



Actions + Add Invitee's

Documents 📄

Settings ⚙️

Validation: ⓘ
 Required Read Only

Add a field label: ⓘ
Bank Name

or **Type** your own
Bank Name

Please choose drop down list type:
 Normal Country State

Select from existing Drop Down Lists:
Select...

Drop Down List Name:
Bank Name

Save ⓘ

Choices:

Default	Option	
<input type="checkbox"/>	Bank1	🗑️ +
<input type="checkbox"/>	Bank 2	🗑️ +
<input type="checkbox"/>	Bank 3	🗑️ +

Tools Bar

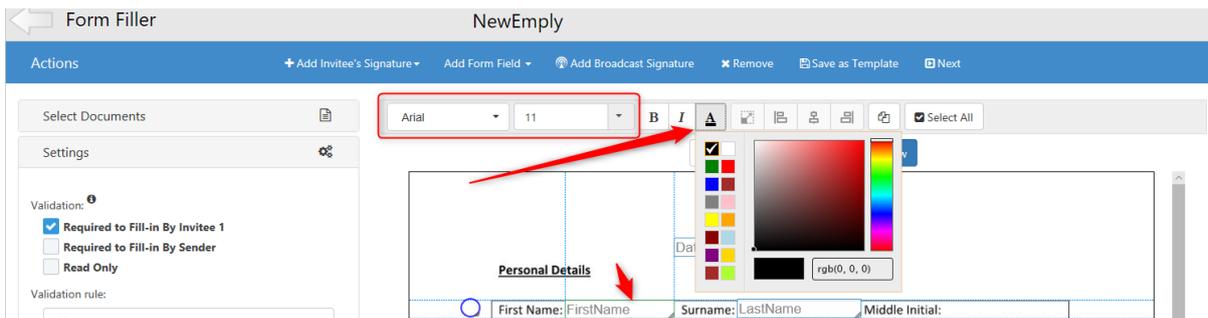
Change font size, match fields box size, align fields boxes and more, helping you to create the perfect form for your business needs.



1. Font Size
2. Bold font
3. Italic font
4. Match Fields Box Size, select the fields you want to match fields size and press CTRL to select more fields
5. Align Selected Boxes to left, right, centre. First box selected all other fields / boxes will be align to
6. Duplicate fields – select box / filed to duplicate

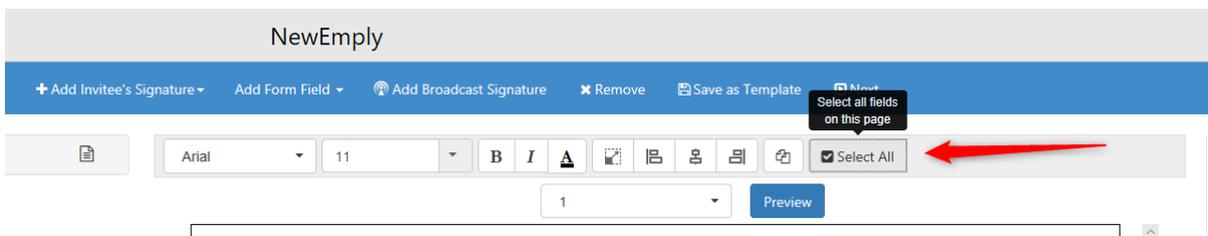
Font Colours

Change Font Colour in the field.



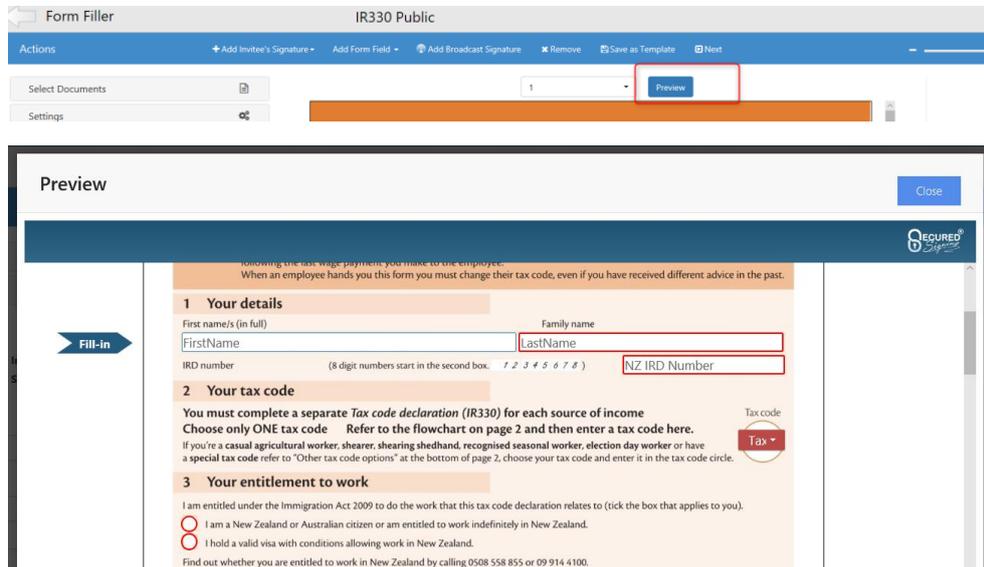
Select All fields

Select all fields on this page, to set the same font size, colour or alignment to all fields at once.



Preview Template

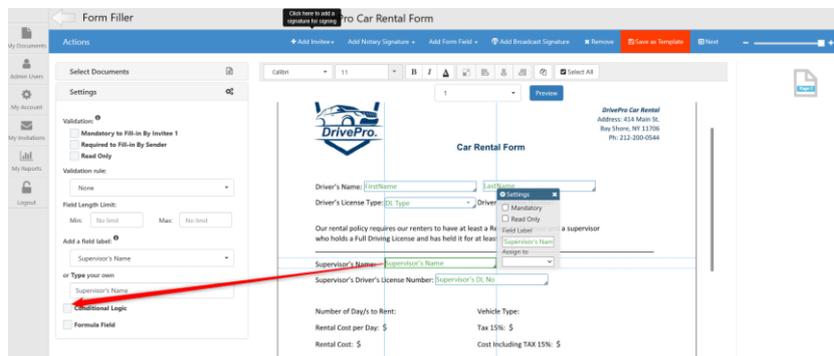
After Form design done now you can preview it how it will look alike for invitee to filling and sign. Also, a form fields position fine tuning can be done after preview.



Conditional Logic Field (New)

Secured Signing’s Form Filler just got better with Conditional Logic and Formula Fields features. A template that provides a flexible and customized document signing experience for the users. With Conditional Logic fields, users can create templates that adapt to the Invitee’s responses, showing relevant and applicable information. Creating a much more efficient business workflow.

To enable Conditional Logic in the Field ticked Conditional Logic on the left side menu.



To Create Ticked the box Conditional Logic and create the Conditions

Conditional logic for the field

Apply to field **Supervisor's Name**

If	DL Type	Is	Select	Restricted		Mandatory	Show	
						<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	+
Or	DL Type	Is	Select	Lerner		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	+ -
						<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

AND
OR

If not match any rule, default actions

Mandatory Show

Rules Applied

- If DL Type Is Select Restricted then set field to mandatory and show
- If DL Type Is Select Lerner then set field to mandatory and show

1. You can create up to 5 conditions.
2. You can create OR and AND function.
3. You can select input from different fields to create the continual logic.

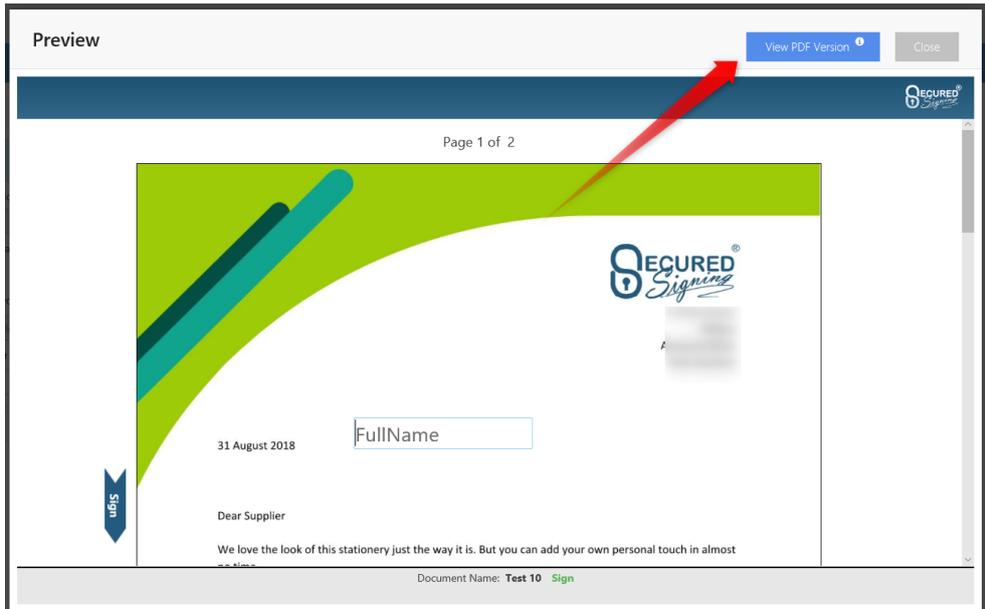
Formula Field **(New)**

The Formula Fields offers complex calculations and decision-making rules that automate the signing process, reducing errors and improving accuracy. Providing a comprehensive and personalized signing solutions to customers.

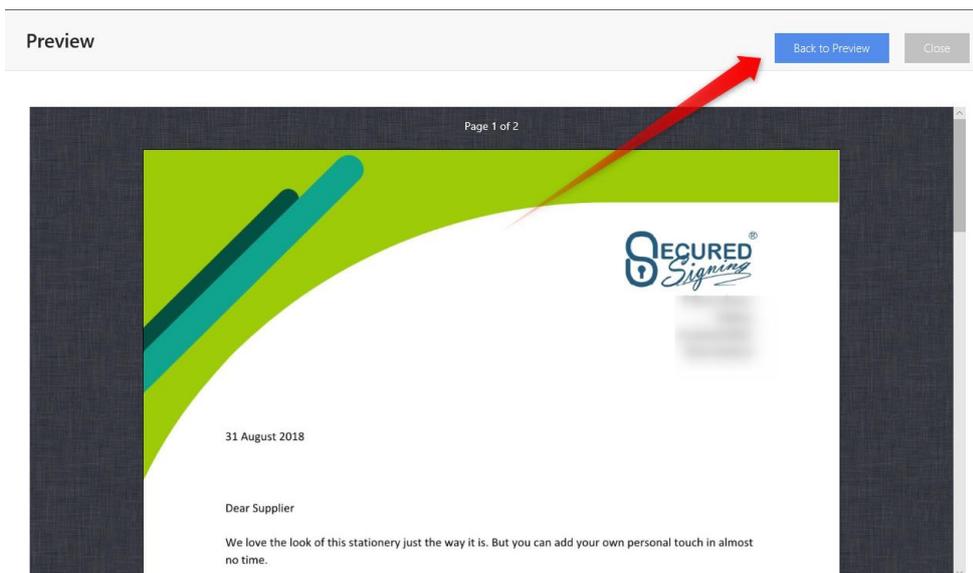
View PDF version

Now you can view how the signed PDF will look like.

You need to entre data into the field(s) in the preview screen before selecting 'View PDF Version' for it to show. Otherwise the field will show up blank in the PDF Version.

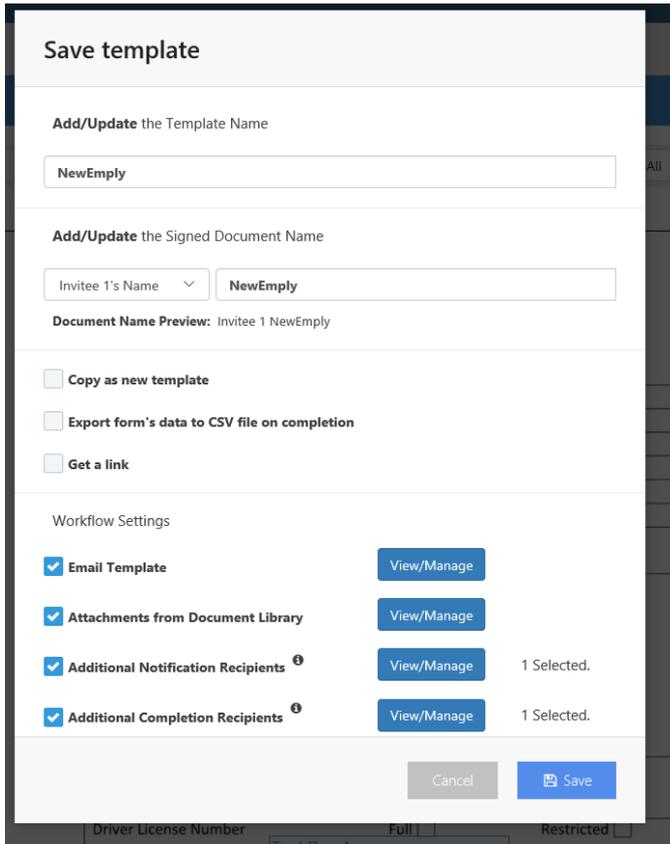


The PDF



Save Template Workflow Setting

Once a template has been created or updated you can choose workflow settings specific to the template, these settings will apply automatically on sending without any further configuration.

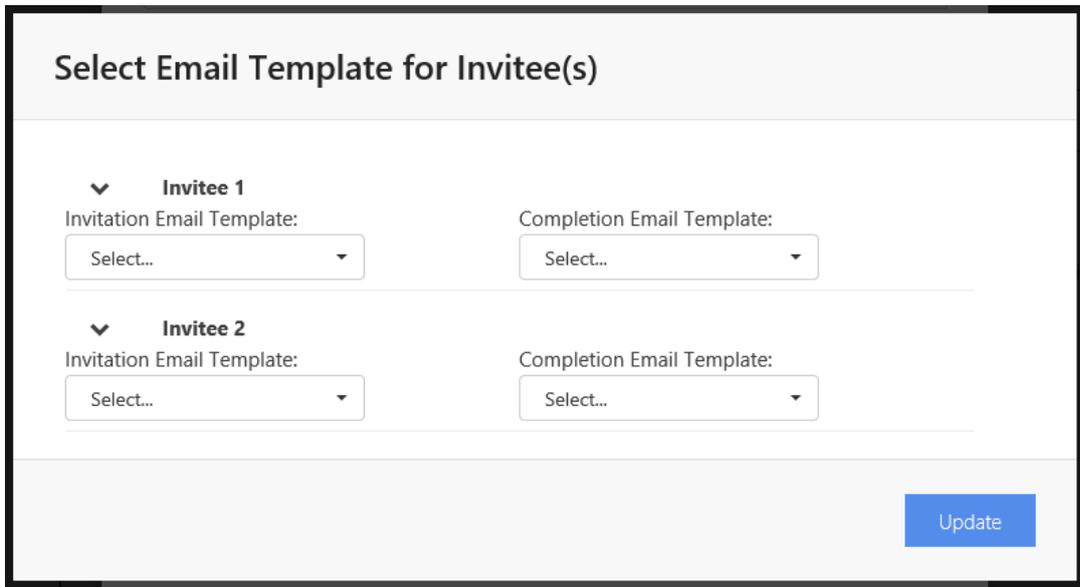


The workflow options for specific templates are:

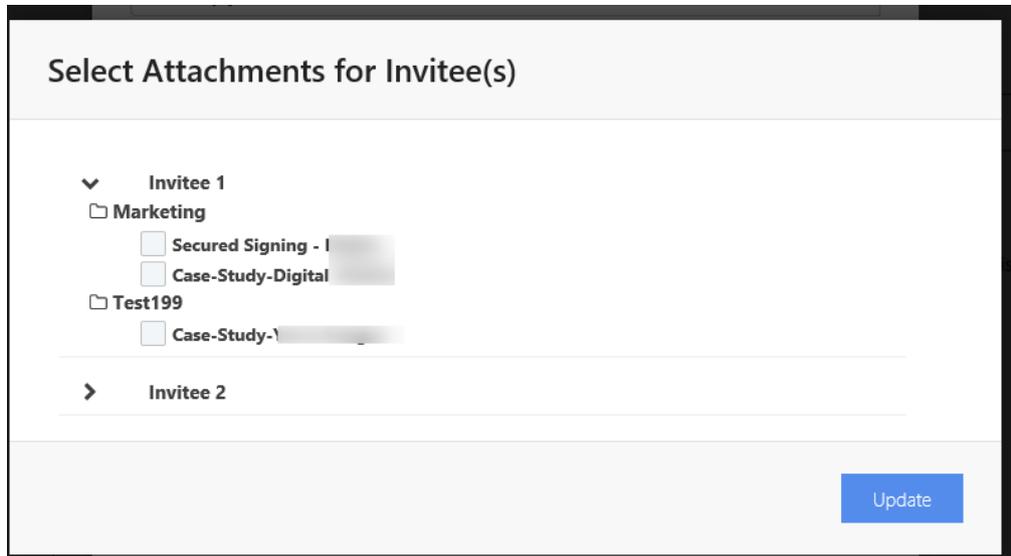
Email Template – Choose specific invitation or completion email templates for each invitee in your form

setup email invitation and completion templates at My Account -> My Email Template, and setup email template,

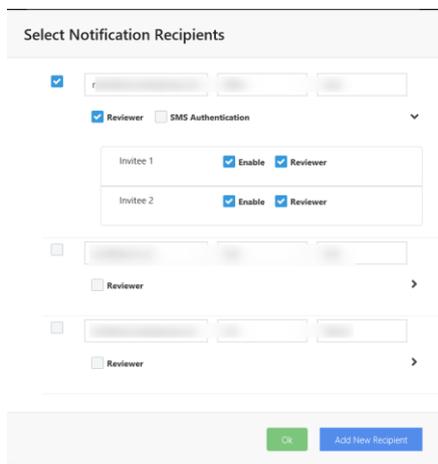
In case you have selected multiple forms with different set email templates, the system will ask you to choose one for each invitee, as invitees can only receive one invitation and completion email for a package.



Attachments from documents library – Add documents as attachments to the email invitation, these documents can be selected from the document library. Select for each invitee which document you want to add to the email invitation by default. Upload files to your document library at My Account -> My Setting -> We Sign Document Library -> Manage document library, please note the 'Upload From PC' setting should be enabled as well.

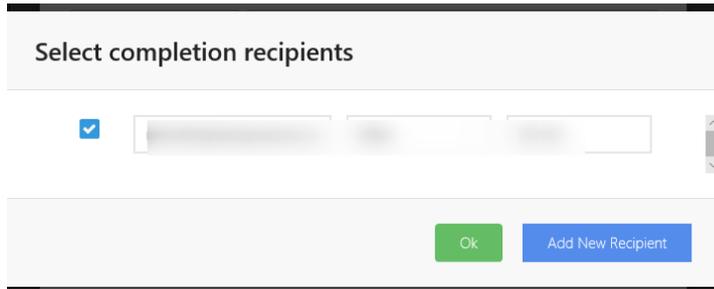


Additional Notification Recipient – Add people you want to notify when the invitation is sent out, you can also make them a reviewer for the document. This can be set for each invitee. You can set up additional notification recipients at My Account My Setting or add them as you go for each template.



Additional Completion recipient – Add people you want to receive the signed document by email without being part of the signing process, for example your payroll or legal department.

This can be enabled in My Account -> My Setting -> Additional Completion Recipients



Select completion recipients

[Redacted]

Ok Add New Recipient

Signed document Name – set the name of final signed document, with Invitee 1’s name as a prefix or without , you can also set the signed document to any file name as needed.

Add/Update the Signed Document Name

Invitee 1's Name

Document Name Preview: Invitee 1 NewEmply

Edit By **(New)**

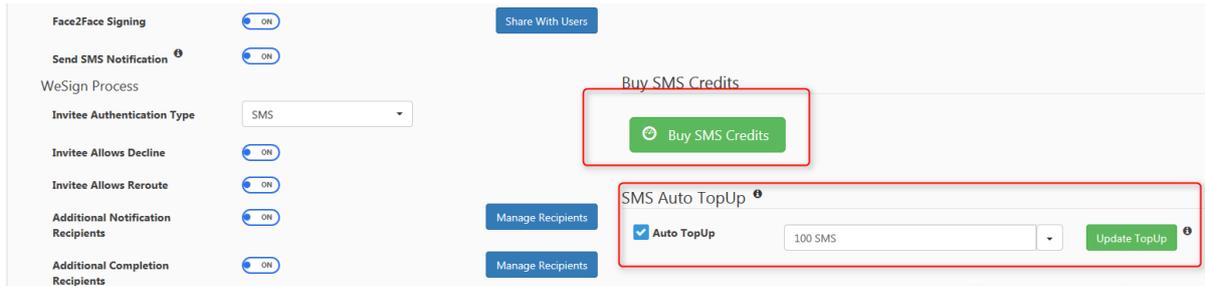
Get a Link **(New)**

SMS Code

Secured Signing supports SMS for:

- 2 Factors Authentication
- SMS Notification
- Email Reminders

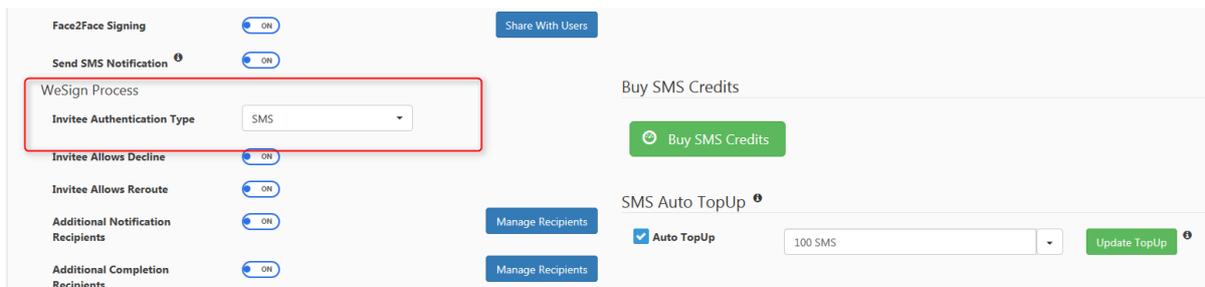
To use SMS functionality, you will need to buy SMS credit. You can do this at My Account-> My Settings. The credit will remain until all SMS credits have been used. We do not offer a refund for unused credits. The minimum SMS credit you can purchase is for 100 SMS. You have the option to enable automatic top up



SMS Authentication – 2 Factors authentication

For added security, we offer the option of 2 factor authentications for signing. The system will send both an email invitation for signing and SMS code that is required to be entered for signee to access the document and sign by SMS. This method of 2 factors authentication is building better delivery and more secure channels.

To enable 2 factor authentications, login to your Secured Signing account -> My Account -> My Settings -> change the invitee authentication type to SMS.



From now on every invitation sent out, document owner will require to include invitee mobile number. Invitee needs to enter the security code sent by SMS, to access the document and begin the signing process.

The SMS sending actions are added to the Audit Log / Document Log with SMS successful sent or not, includes invitee mobile number.

Document Log for "Sample Document"

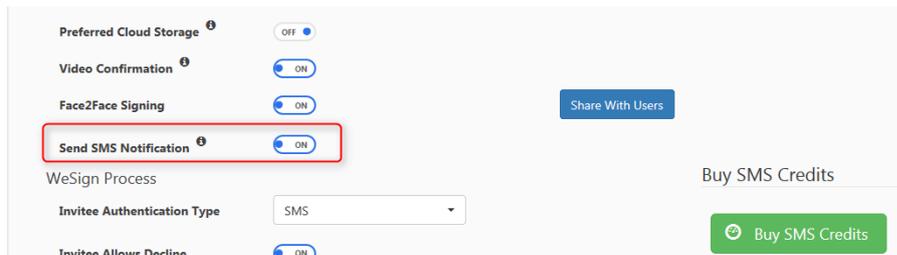
- [redacted] | WeSign Process Complete on 22 Oct, 2017 at 04:17:10 p.m. (GMT +13:00)
- Stu Wood Signed Document on 22 Oct, 2017 at 04:17:10 p.m. (GMT +13:00)
- Secured Signing SMS sent to Stu Wood [info@securedsigning.com] Mobile Number 64 - Successfully on 22 Oct, 2017 at 04:16:52 p.m. (GMT +13:00)
- Stu Wood Acknowledged the receipt of the document as an Invitee on 22 Oct, 2017 at 04:16:50 p.m. (GMT +13:00)
- [redacted] | WeSign Invitation email sent to Stu Wood [info@securedsigning.com] for doc name: Sample Document on 22 Oct, 2017 at 04:16:25 p.m. (GMT +13:00)
- [redacted] Started WeSign Process [Sequential: Off] on 22 Oct, 2017 at 04:16:21 p.m. (GMT +13:00)
- [redacted] | Invited Stu Wood on 22 Oct, 2017 at 04:16:21 p.m. (GMT +13:00)
- [redacted] | Sample Document Created on 22 Oct, 2017 at 04:15:45 p.m. (GMT +13:00)

This function is also available for automated from Smart Tag. For more info on this, please read our Smart Tag Guide <https://ds.securedsigning.com/support/demo-assets/Smart%20Tag%20Guide.pdf>

SMS Notification

Secured Signing supports sending invitation link by SMS and email. Short link will sent by SMS for invitations and reminders.

To set it up login to My Account -> My Settings

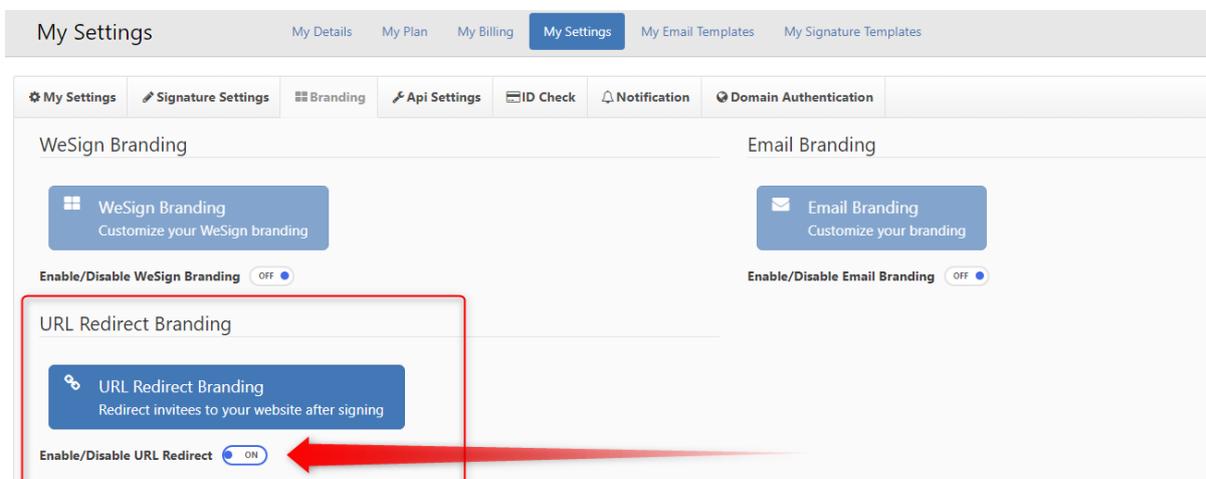


The SMS link is protecting by a security code. Invitee can initiate the signing process from the SMS and complete to signing process from their mobile phone. Internet access is required.

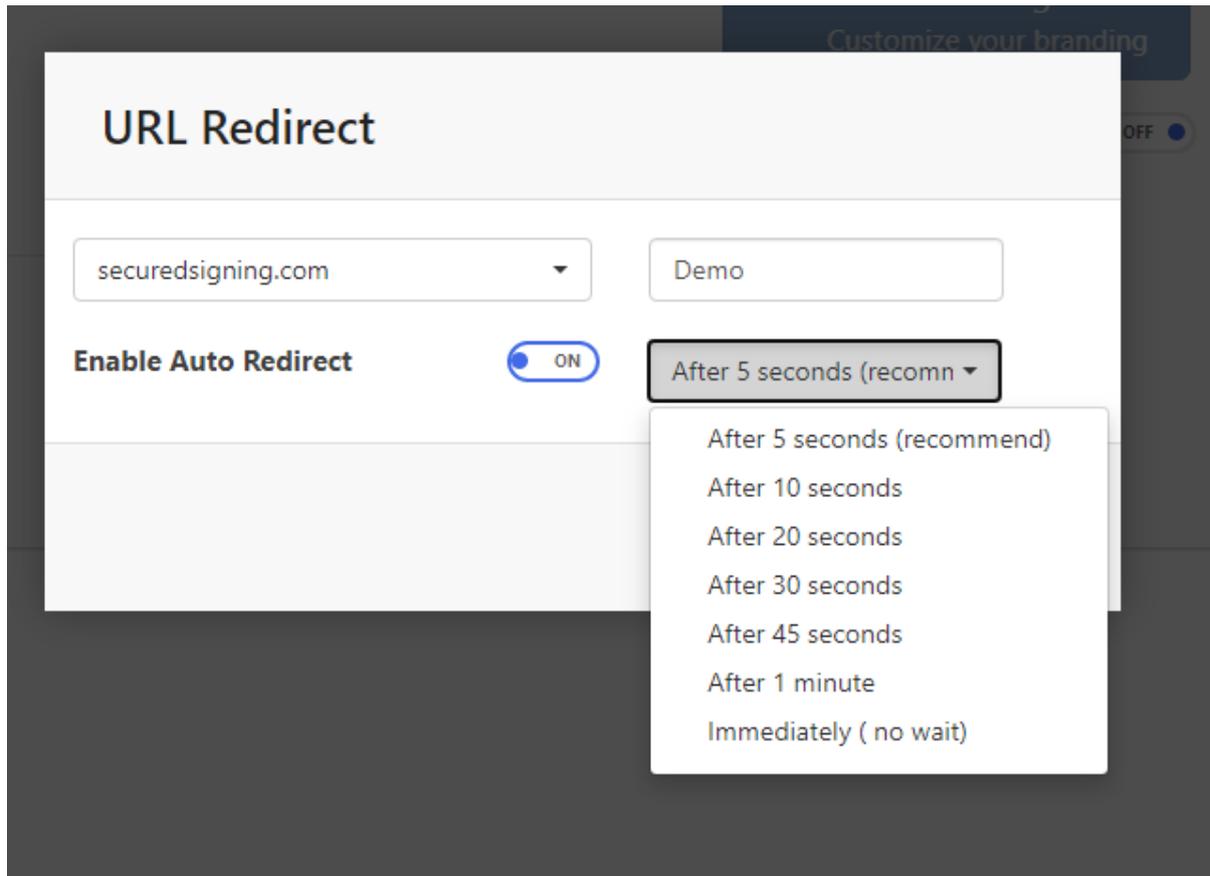
This function supports automated from Smart Tag, for more info look at Smart Tag Guide <https://ds.securedsigning.com/support/demo-assets/Smart%20Tag%20Guide.pdf>

URL Redirect Branding

As part of your signing page branding and email branding, you can now redirect any invitees/signers on a document/s completion to your website in order to provide full company branding. This setting can redirect signers to any page you choose and is ideal for providing further instructions for signers after a document has been signed, or building tracking system based on the chosen page.



In order to be able to set up URL Redirect Branding you need first to setup [domain authentication](#).



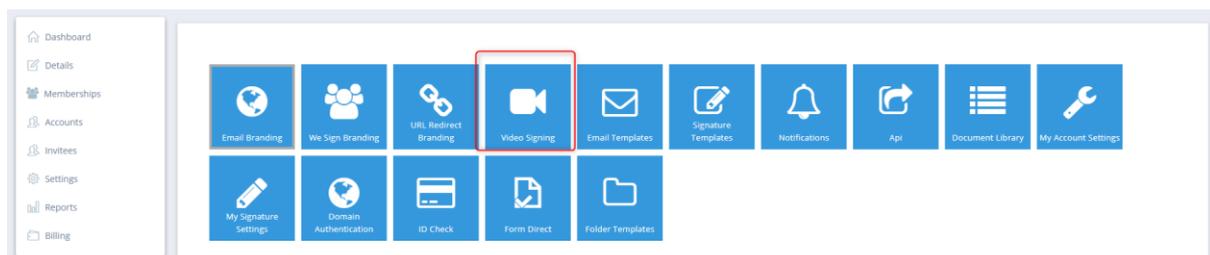
Enter the page you want to redirect to, and choose how long they remain on the signing completion page.

Once done click save.

Enterprise Admin Portal

Video Signing Setting

To enable Video Signing for all users in enterprise account go to Settings.



Enable Video signing and be sure the video recording storage is in the right region for you.

Enable/Disable Video Signing	✓
Video Recording Storage	US
Enable/Disable Recording Archive Storage	✓

Video Signing allows you to have all in one, digital signature and video call (Audio and Video) in one platform. You can use it to sign any document type based on the legal requirements of your country.

Video signing supports from 1 up to 50 participants.

Video Signing Browser Support; please use the latest version in each browser:

	Chrome	Firefox	Safari	Edge
Android	✓	✓		
iOS			✓	
macOS	✓	✓	✓	
Windows	✓	✓	✓	✓(ver 81+)

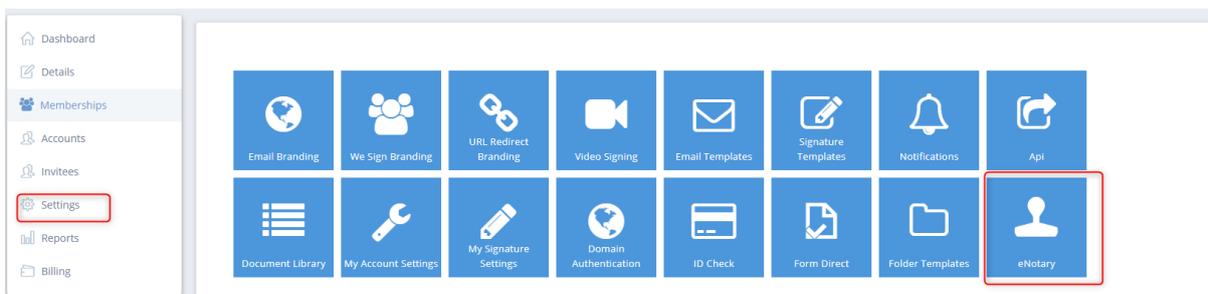
You can invite guests who are not needed to sign but can support the signer in the video meeting.

The sender, invitee, or any other person that is nominated by the sender can host the Video Signing meeting.

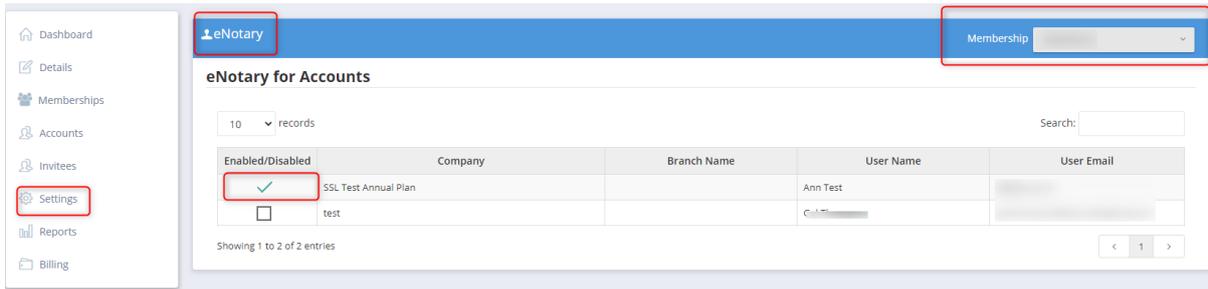
Video signing’s cost is on top of the document usage and users plan.

eNotary

Enable eNotary in the admin portal for a selected user who is acting as an eNotary



Select the user and they will get an email notification to set up their account for eNotary use.



Notary Queues **(New)**

Notary Queue is perfect for medium to large companies performing frequent signing services and have remote, in-house RON certified Notaries able to perform RON for the entire company.

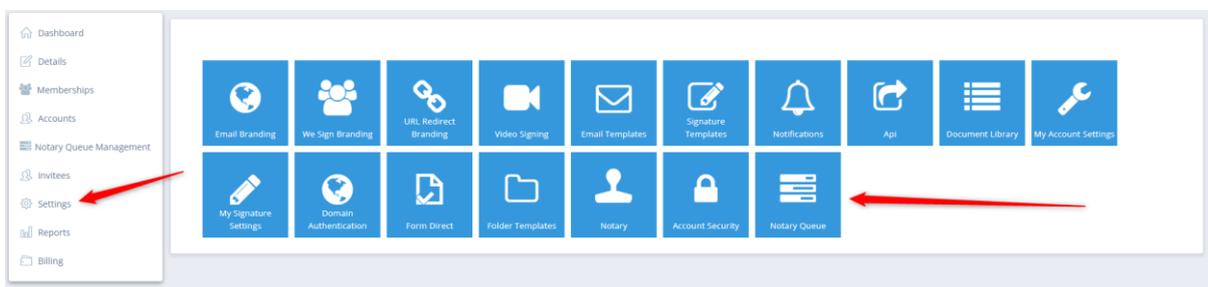
The new feature supports the ability to have different roles/people assigned to the document that can prepare and tag as needed, a meeting host and a notary. The feature also allows for the company to run the notary signing service within the queue feature.

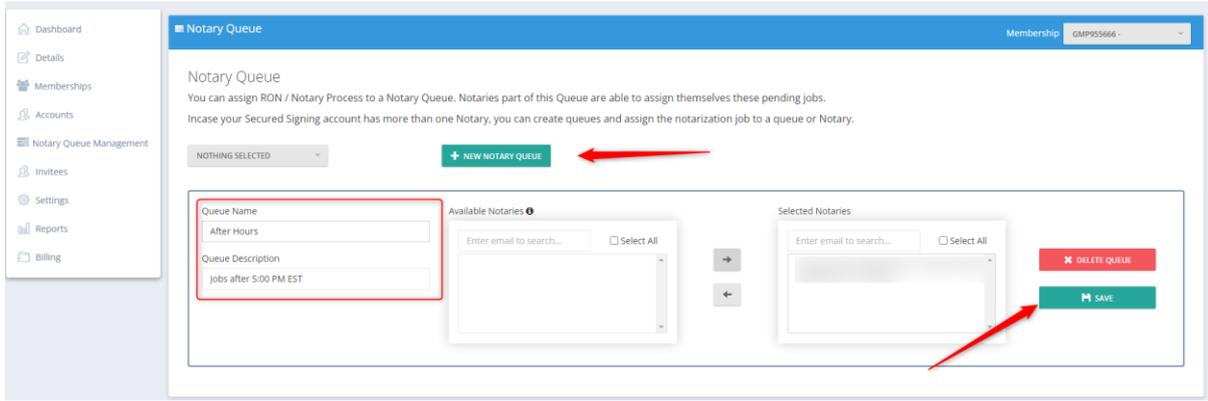
Using Secured Signing's API or a manual entry process, the scheduler enters the data and assigns it into a queue. A pool of your company's notaries can pick up the assignment or you can assign it directly to a specific notary of choice. This is also a great solution for enterprise clients who plug into a pool of notaries that fulfil session requests on a shift basis. Any notary on duty can pick up the assignment for immediate or future fulfilment. If they pick up the assignment by mistake or cannot complete the assignment, they simply return it to the queue for pick up by another notary.

Notary Queue Set Up **(New)**

Enterprise account (unlimited number of users/notaries) plan can setup unlimited queue and can assign available notaries to the queue.

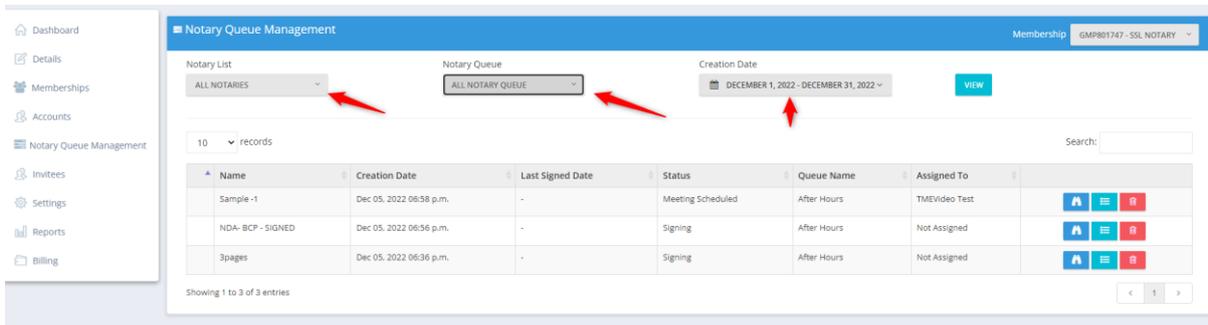
An admin user can set up multiple queues based on types of transactions, time of the transaction or special language requests etc. You can create as many queues as you required.





Notary Queue Management **(New)**

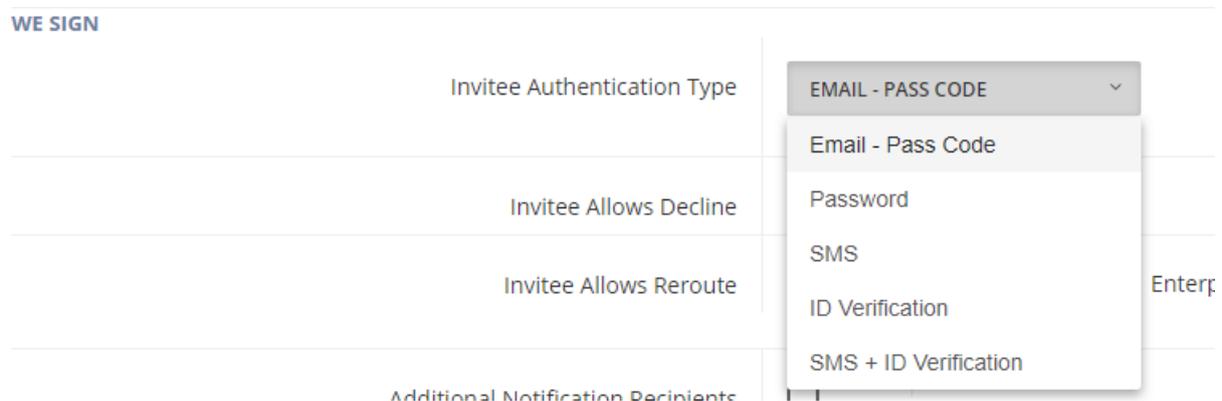
Admin users within a Team or Enterprise account plan have full visibility and control of the notary queues. The admin or those assigned in a queue have visibility of the queue for management and monitoring of the process, ensuring all submitted requests are fulfilled!



Invitee Authentication Type

You can find the setting for that in My Account → My Settings

Document security access has several authentication types. Invitee/ signer needs first to pass the authentication type in order to access signing process and view the documents that need to be fill-in and sign.



You can build of more than one Authentication type such as SMS + ID Verification.

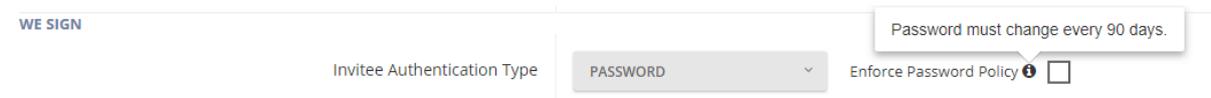
Video Confirmation it is additional way to know who was behind the device at the signature moment

Email / Passcode

Email invitation or reminders are sent to the invitee with a passcode to access the document. The invitee needs to click on the email link and enter the pass code contained in the email. This is the basic authentication level using the email address of the invitee to confirm their identity.

Password

Invitee is required to create a Secured Signing password that meets the Secured Signing password policy's requirements. The first time the invitee creates the password they can use it in subsequent signing processes. If the password policy is enforced, the password needs to be replaced every 90 days.



WE SIGN

Invitee Authentication Type: PASSWORD

Enforce Password Policy

Password must change every 90 days.

SMS

Multi-factor authentication- email invitation is sent to the invitees' email and once they click on the link an SMS code is sent to the Invitee's mobile phone. The sender enters the invitee's mobile phone number during the invitation process. SMS has extra cost, look to our pricing page for SMS price.

ID Verification

Government-issued identity documents are at the heart of many identity-vetting processes. Performing up to 50 different text- and image-based tests and checking IDs against a database of nearly 4,100 ID types from nearly 200 countries.

The Facial matching software performs powerful biometric facial recognition match and liveness detection to prevent identity theft and fraud. A user simply captures an image of their government issued ID and then takes a selfie. The selfie image is compared to an extracted photo from the identity document such as a driver's license or passport to verify a match and provide a confidence score. NIST tested algorithm for biometric facial recognition match with optional advanced passive liveness test which requires no action and is iBeta compliant. Prevents presentation attacks from printed images, masks, recorded video or synthetic video.

Secured Signing enhances the ID Verification process by creating a strong link between the ID and the document. You can create a matching process, so that some data should be part of the ID presented for the ID Verification process. You can select what parameters you want to match with the ID.

WE SIGN

Invitee Authentication Type	EMAIL - PASS CODE	
Invitee Allows Decline		
Invitee Allows Reroute		Enter:
Additional Notification Recipients		

EMAIL - PASS CODE ▾
 Email - Pass Code
 Password
 SMS
 ID Verification
 SMS + ID Verification

You can also decide if you want to continue the signing process if data doesn't match or stop the process. Either way an email notification is sent to the sender to notify them about the mismatch. This same process applies if the Facial process doesn't match the picture on the ID, or selfie picture quality is poor. The signing process can stop or continue, and the sender will get an email notification in the selfie and ID do not match. A good score for Facial matching is about 80 points.

WeSign Process

Invitee Authentication Type ID Verification ▾

ID Verification Setting:

Matching First Name ▾

If Not Match Continue Stop

If Not Facial Match Continue Stop

OFF ON
 Enable ID Verification Link in Signed Document

A link to ID Verification results can be embedded on the signed document to build trust and everybody can be sure the signer checked the identity of the invitee.

These settings can set up for for each signing process in the Invitation workflow popup

Invitation Workflow

Due Date [Ⓢ] Signing Order Type [Ⓢ]
 Sequential

Video Signing Enable

Check Invitees

LORRAIN ADORNATO ✎ Edit Invitation Email

Authentication: ID Verification ▾

Matching: First Name ▾ If not Match Continue Stop

If not Facial Match Continue Stop Add link to ID Verification in signed document

Video Confirmation [Ⓢ] Face2Face Sign

Knowledge Base Authentication

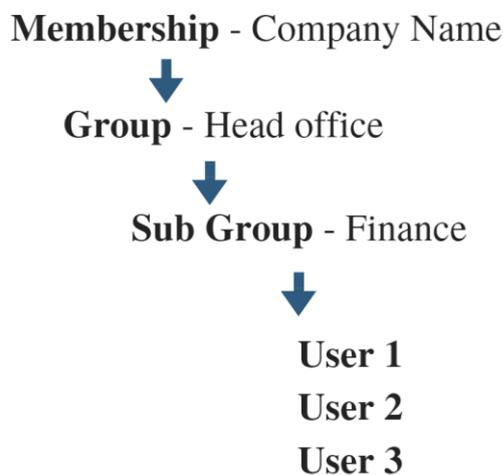
Please note: available for Secured Signing accounts and only for US citizens

Knowledge-based authentication, commonly referred to as **KBA**, is a method of authentication which seeks to prove the identity of someone accessing a service. As the name suggests, KBA requires the knowledge of private information of the individual to prove that the person providing the identity information is the owner of the identity. *Dynamic KBA*, which is based on questions generated from a wider base of personal information.

Identity proofing is the means by which the principal (signer of a document) affirms their identity. This is done through a third party who uses dynamic knowledge-based authentication (KBA). KBA is a process in which the principal is asked a series of questions about the principal's identity and personal history. In order to pass, the principal must answer at least 80% of the questions correctly. If the principal fails their first attempt, they may retake the quiz once within 24 hours. If the principal fails a second attempt, they are prohibited from retrying with the same notary for at least 24 hours.

User Grouping

The hierarchy structure for an Enterprise account is:



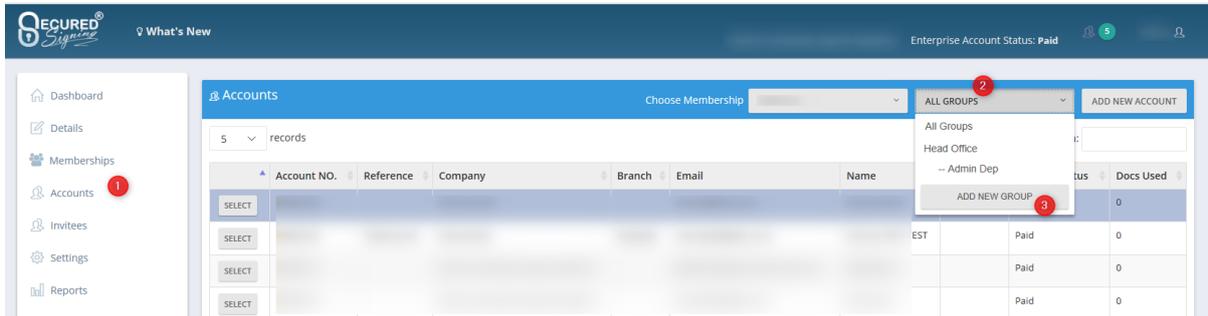
Membership level is the enterprise account for a company or a brand. You can have more than one membership account for each of your brands or companies within a group of companies. To add more membership accounts please contact Secured Signing Support.

Once a membership has been created you can now build accounts (your users in the company) and group them create to a group. You can also create subgroups, with users included in multiple groups and subgroups.

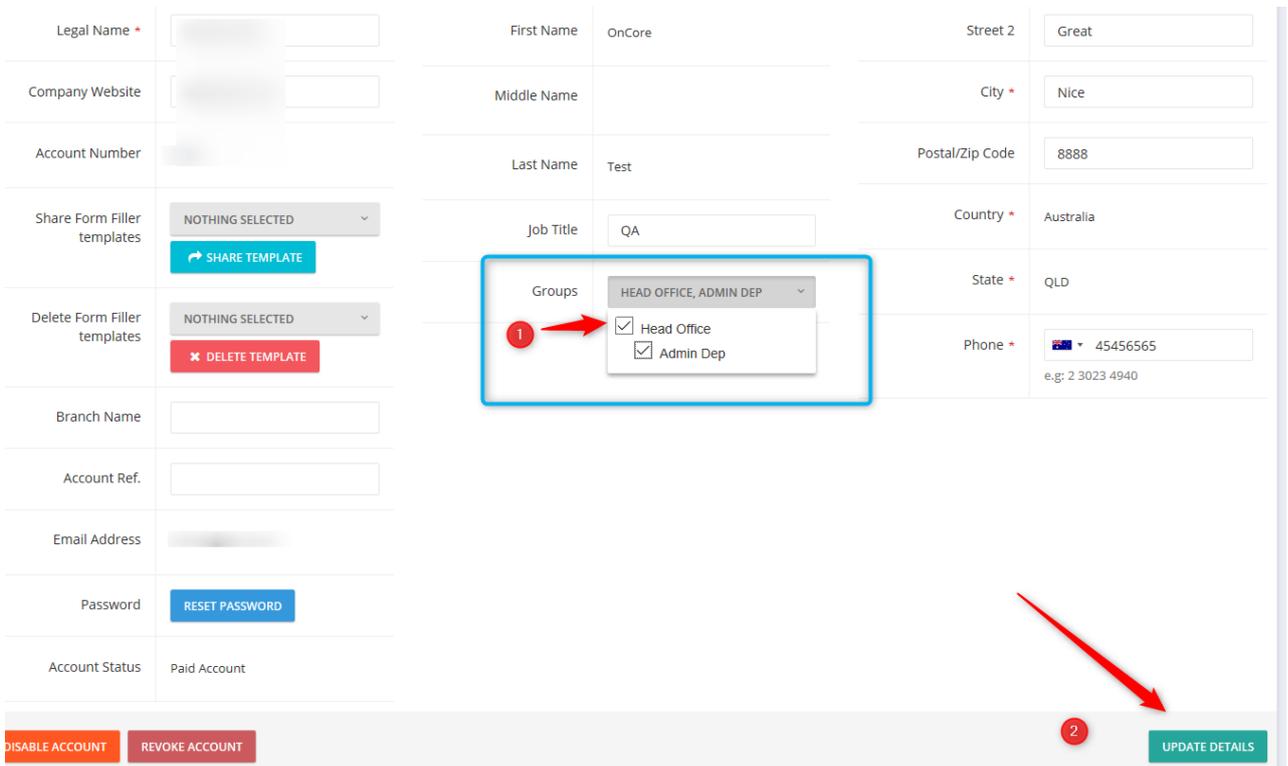
For example, create a group called Head Office and then sub groups such as Legal department and Marketing etc...

Each account can belong to more than one group.

Once you have created the right grouping structure for your company you can start sharing templates across accounts and groups.

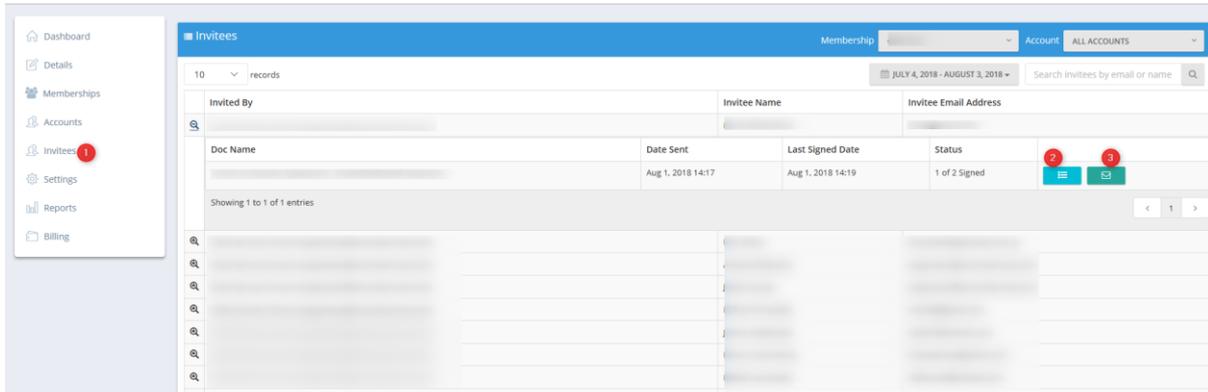


Then link user / account to a group just add account and select the correct group to be part of.



Invitee Tool

Admin users can see all invitees for all accounts/ users in the enterprise account. They can monitor and manage the signing process per invitees and also support users/ accounts.



Admin users can view the document log. They can also send manual reminders for an in-progress documents.

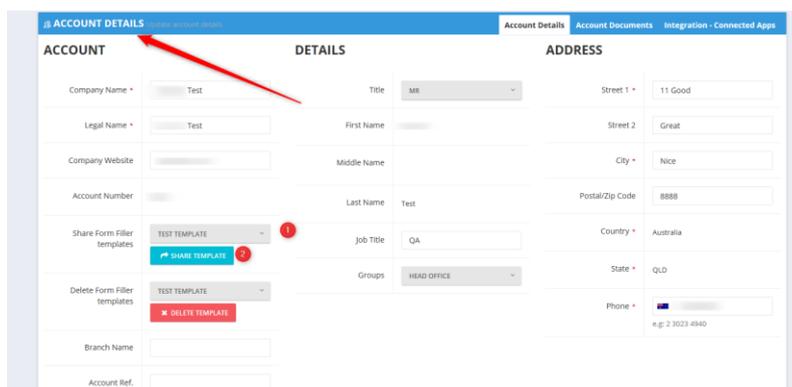
Form Filler

Share Template

Each account / user can create their own templates using Form Filler. Then Admin User in Admin Portal can share this template with other accounts or groups

First create the template in user's account by using Form Filler.

In admin portal select the template owner account in Accounts page



Select the group to apply all accounts in the group

Share Template - Test Template

Groups Accounts Search:

Head Office
 Admin Dep

CLOSE SHARE

Or select specific account and share.

Share Template - Test Template

Groups Accounts Search:

Name	Email	Groups
<input type="checkbox"/>		Head Office
<input type="checkbox"/>		

CLOSE SHARE

Delete Template

Admin users in Enterprise Admin Portal can delete templates by: Go to Accounts-> select the accounts / user who is the template owner -> and then select the template that needs to be deleted. Prese delete, and it's done.

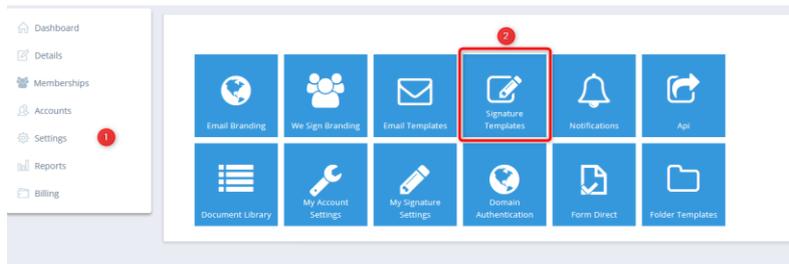
ACCOUNT	DETAILS	ADDRESS
Company Name *	Title MR	Street 1 * 11 Good
Legal Name *	First Name	Street 2 Great
Company Website	Middle Name	City * Nice
Account Number	Last Name Test	Postal/Zip Code 8888
Share Form Filler templates TEST TEMPLATE	Job Title QA	Country * Australia
Delete Form Filler templates TEST TEMPLATE	Groups HEAD OFFICE	State * QLD
Branch Name		Phone * 45456565 e.g: 2 3023 4940
Account Ref.		

Signature Template

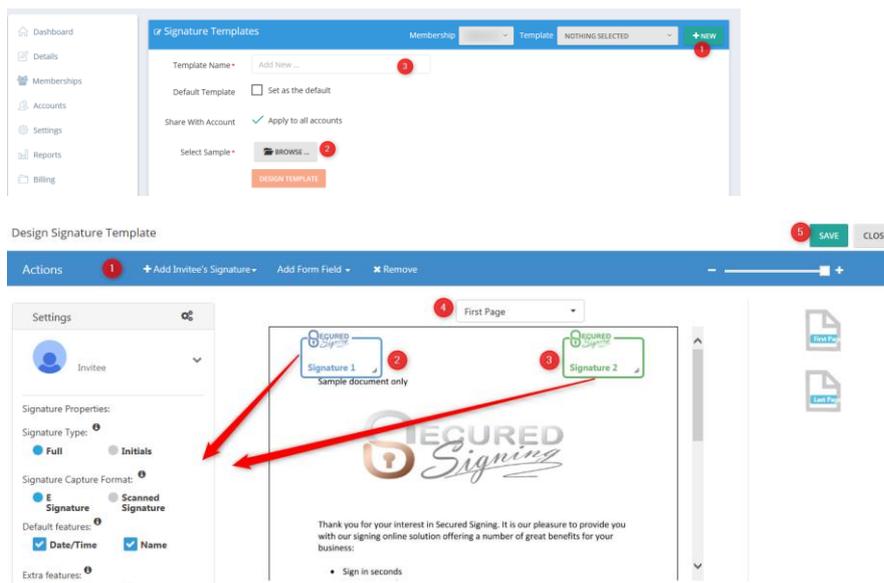
We are always looking for a way how Secured Signing can automate the signing process and make the document preparation faster and easier. Signature Template allows you to apply signature position template to a document or bunch of documents in package, just add invitee's details and press send. No spending time to position signature on the document.

This process is good for invoice approval or repeat documents layout, or for same signature position in many of you document, for example last page at the bottom.

First you need to design the signature template that can apply. To do that login to Secured Signing Enterprise Admin Portal go to Setting -> My Signature Templates



How to design signature template



Steps to build a template

First of all select a document from inbox.

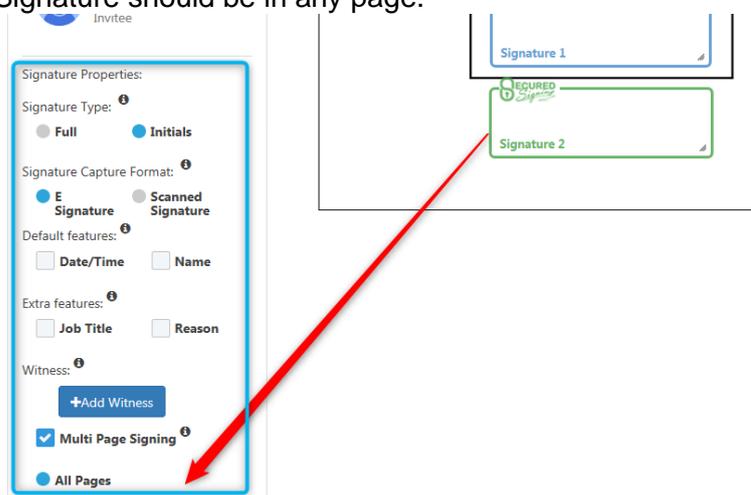
- Set template name and select the page you want to add signature, First page for example
- Add Signature, set signature properties on the left. If needed add witness.
- Set this template as a default
- Save
- Share the template with other user in your account and press save

Template signature rules:

- First page all documents should have at least one page
- First and last page all documents should have at least two pages

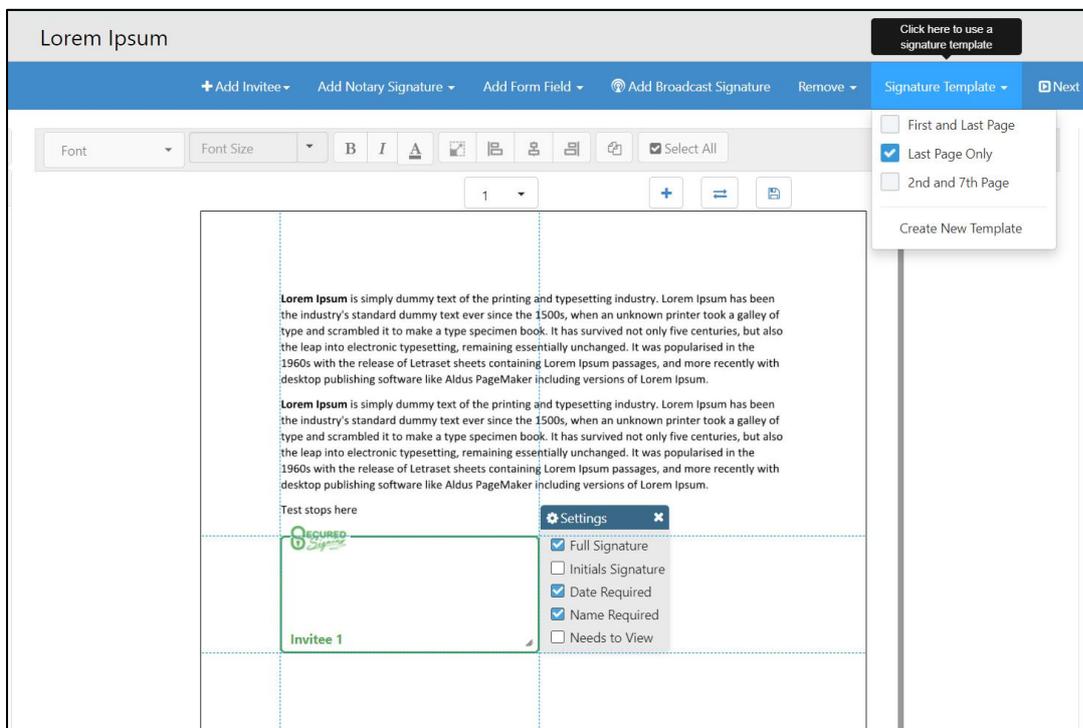
- Signature in specific page, for example on page 2 and page 4, all documents should have at least 4 pages, or on 1st page, page 2, and 4 and last page, all documents should have at least 5 pages.

Signature should appear in all pages regardless number of pages you need to select multipage signing all pages, you can have any number of pages in any document. Signature should be in any page.



Applying Signature Template In Document Editor

Signature Template is available for selection on the top right corner.

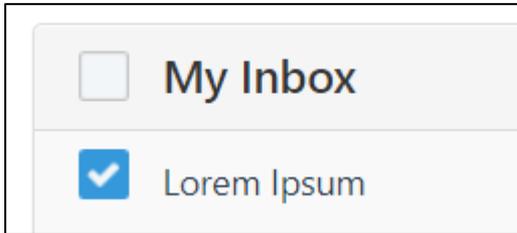


Selecting a template will apply it to the current document where you are able to make further changes before sending it to the invitees.

Inbox

You can apply a Signature Template on an uploaded document from the Inbox with the following steps:

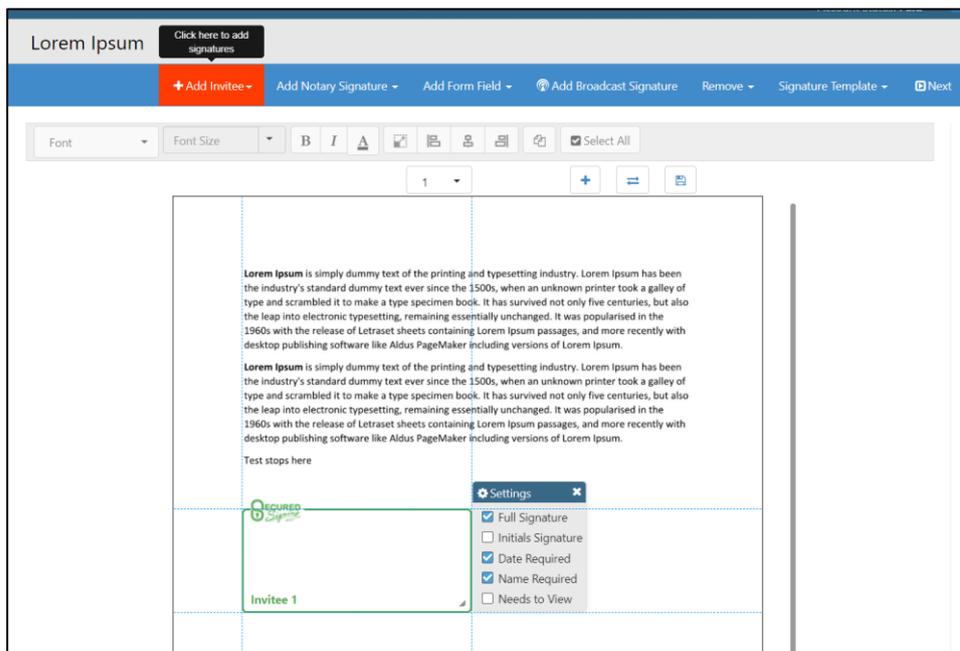
1. Select the document in “My Inbox”



2. Select the option “Select a Signature Template”



You will be redirected to the document editor with the Signature Template applied. In there, you can further edit the document to your needs before sending it to the Invitee

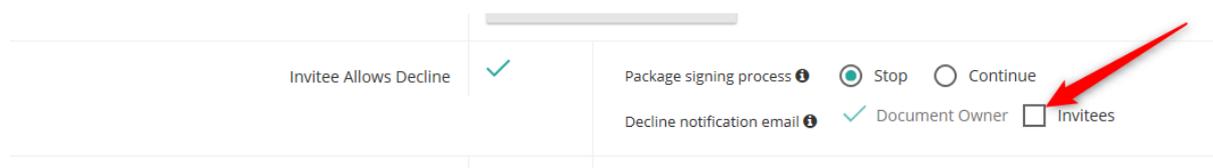


Invitee Allows Decline

Email Decline notification

The default settings for a declined process is that the document owner will receive an email notification that a document has been declined. However, you might want to notify all invitees as well.

To do so login to your Secured Signing Admin Portal – Setting -> Account setting enable invitee allows decline and set email notification as needed.



Invitee Allows Decline	<input checked="" type="checkbox"/>	Package signing process ⓘ	<input checked="" type="radio"/> Stop	<input type="radio"/> Continue
Decline notification email ⓘ	<input checked="" type="checkbox"/>	Document Owner	<input type="checkbox"/>	Invitees

The document owner always will receive email notification about the document that has been declined and by which invitee. However, if you enable Invitees to On, all other invitees will also receive an email notification that the document has been declined and by which invitee.

Decline Continue in package

Many signing scenarios require decline one or more documents in the package and continue to sign the other documents in same package.

Once document has been declined by one of the invitees the other will be able to view it in the signing process but can't sign this document anymore, the signing process for this particular document in the package is stopped but all other documents in the package continue the signing process.

How to set it up

Login to your secured signing account go to Setting -> My Account Setting in We Sign Section Enable Invitee Allows Decline and ticked continue in package signing process. don't forget to press update my setting at the top.



Invitee Allows Decline	<input checked="" type="checkbox"/>	Package signing process ⓘ	<input type="radio"/> Stop	<input checked="" type="radio"/> Continue
------------------------	-------------------------------------	---------------------------	----------------------------	---

Invitee will type the decline reason and the system will notify by email the document owner.

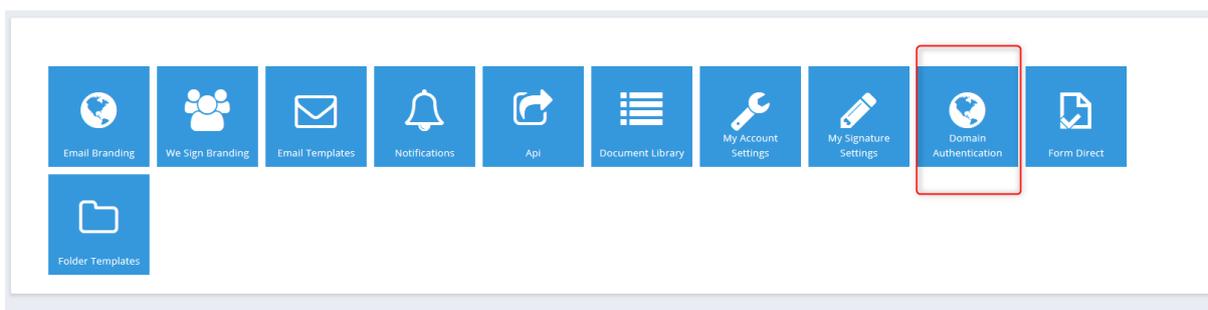
Also, we added decline stamp that include decline by who, why and date and time.

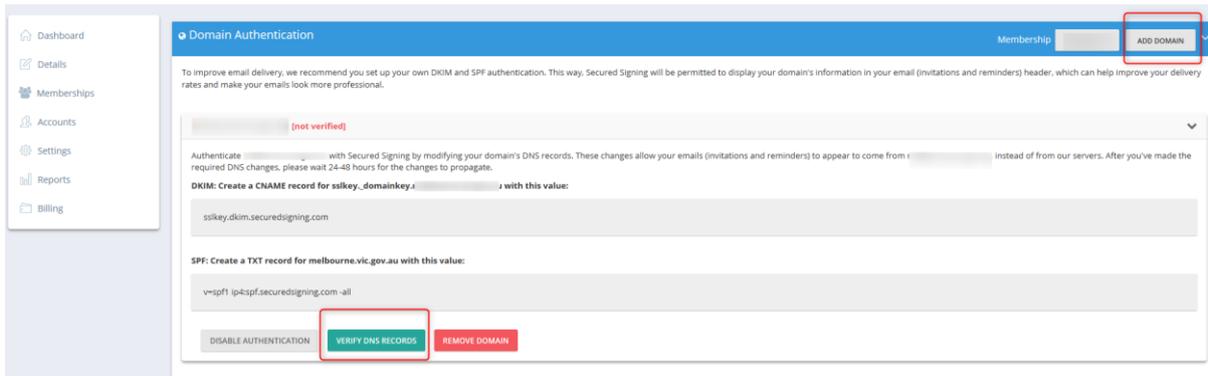


Domain Authentication

To keep up with email sending industry standards, we've added new functionality. Historically, email invitation and reminders are sent on behalf of account owner domain. Now you can improve your email delivery. To do this we recommend you set up your own DKIM and SPF authentication. This way, Secured Signing will be permitted to display your domain's information in your email (invitations and reminders) header, which can help improve your delivery rates and make your emails look more professional.

Domain Authentication - select Add Domain





A list of domains that are part of your users account will be shown. Please complete the changes in your domain DNS records.

Authenticate your domain with Secured Signing by modifying your domain's DNS records. These changes allow your emails (invitations and reminders) to appear to come from your domain, instead of from our servers. After you've made the required DNS changes, please wait 24-48 hours for the changes to propagate.

DKIM: Create a CNAME record for `sslkey_domainkey.your_domain` with this value:

sslkey.dkim.securedsigning.com

SPF: Create a TXT record for your domain with this value:

v=spf1

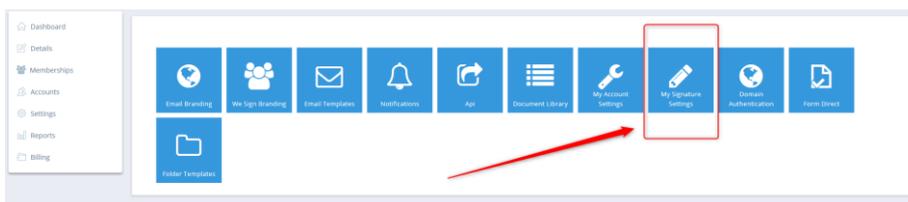
include:spf.securedsigning.com -all

When completed, verify the domain and your email invitation delivery will improve. You are less likely to experience issues such as emails with spoofing message or landing in junk mail folders.

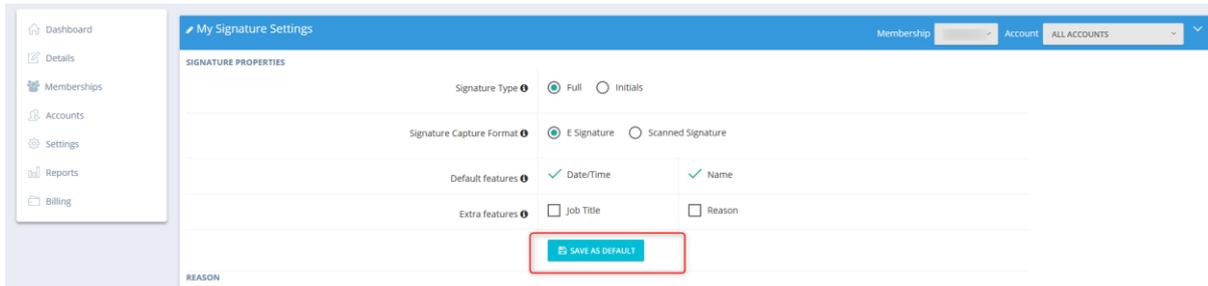
Signature Setting

Set up signature properties for all accounts in the enterprise

1.



2.

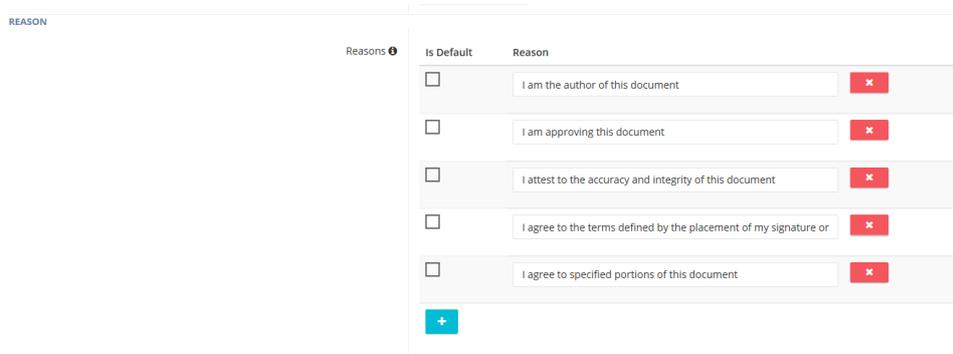


An account can now setup your signature properties from s within the We Sign process. If this is saved as a default, it will overwrite admin portal user setting.

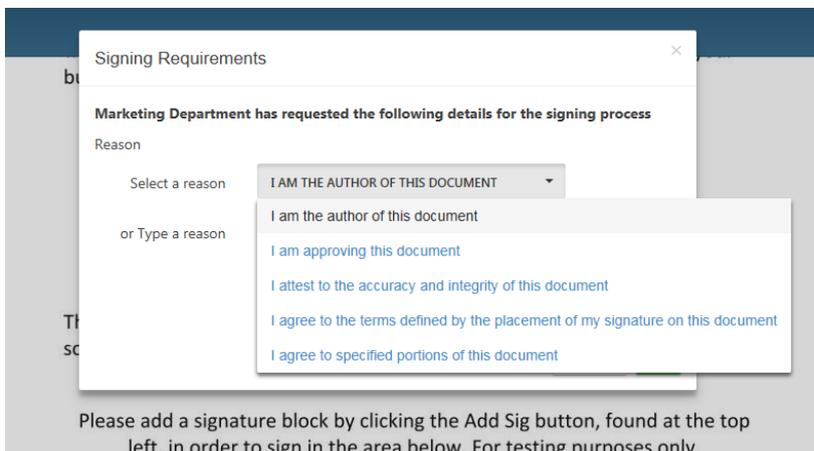
Reason

In case invitee needs to enter their reason for signing they can select from a list or enter their own.

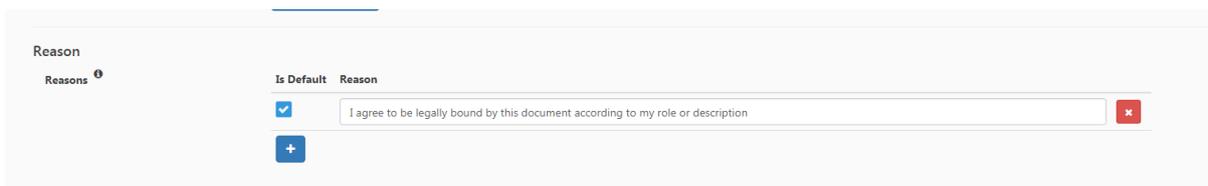
Build your customised list of reasons using this setup screen.



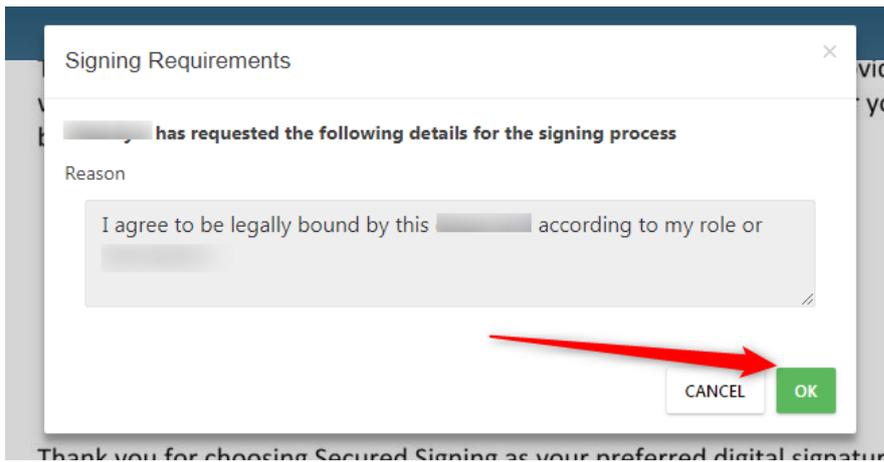
Invitee will see this during the signing process



If “is default” selected (ticked) only this reason will appear for invitee to press OK to sign.

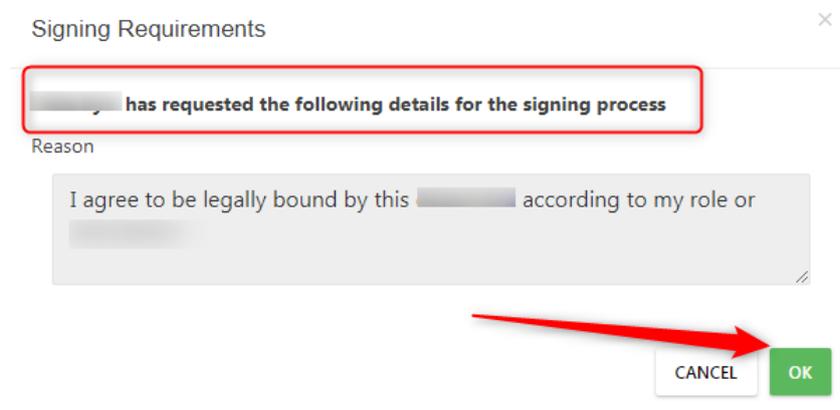
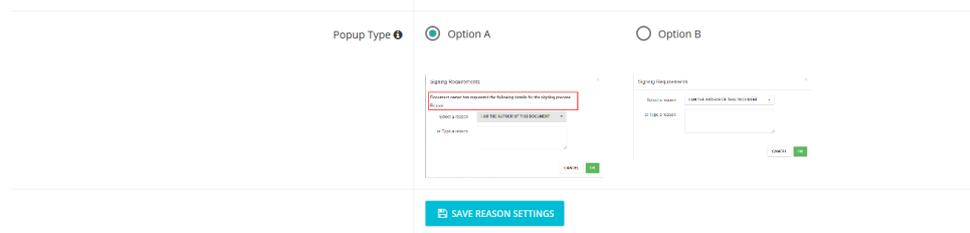


Invitee will see this popup while signing. Press ok in order to sign



Popup Type

You can configure how the pop-up will be displayed during the reason for signing process. You can select from option A or B shown below.

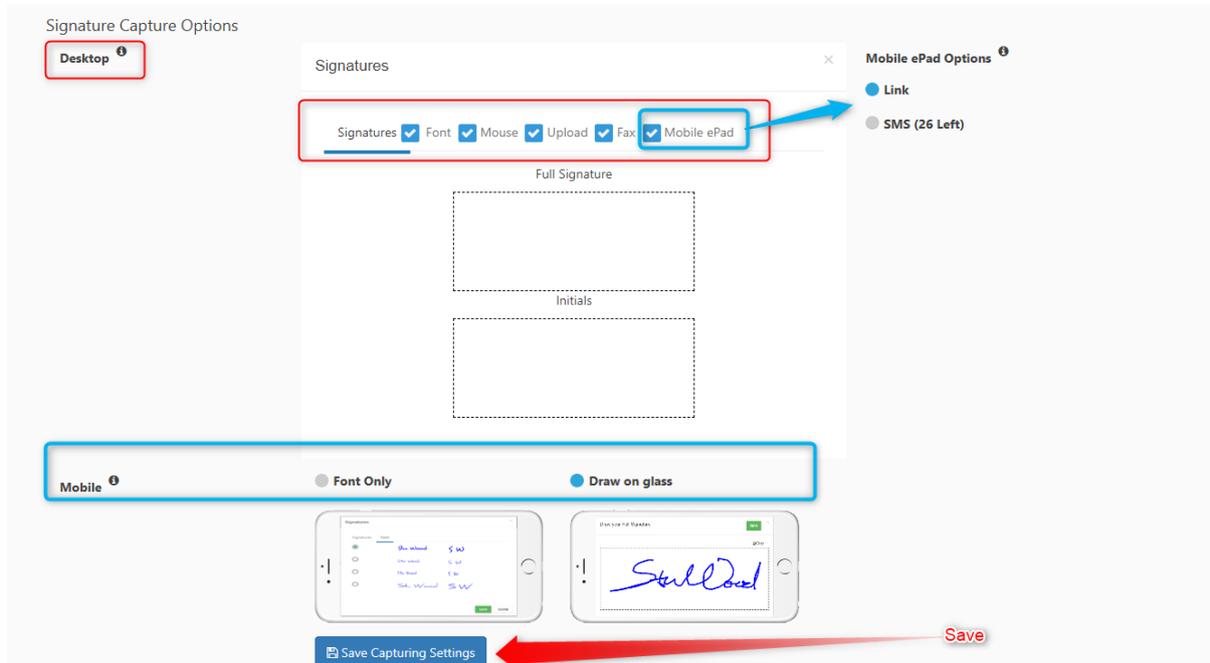


Signature Capture - Capturing method setup

Secured Signing supports several options to capture your graphical signatures in desktop and mobile, you can choose from the following options:

- Font – Signer’s names in predefine handwritten font
- PC Mouse – Draw Signatures with the mouse.
- Upload images – Upload graphical signatures images
- FAX – Print the Fax form, signed, and Fax it to Secured Signing system, signature images will extract form the fax form and attached to Signer’s profile.

- Mobile ePad – Extend desktop signatures capturing with your mobile phone, use the smart phone as an ePad.



For desktop signature capturing, you can decide what type of capturing options are available to you and your invitees. Tick the relevant capturing method and save your selection.

When capturing signature on mobile, the default is to draw on the glass, it will appear for invitee to draw signature with his finger. However, some account owners prefer different methods such as a predefined font, you can select this as shown in the image above.

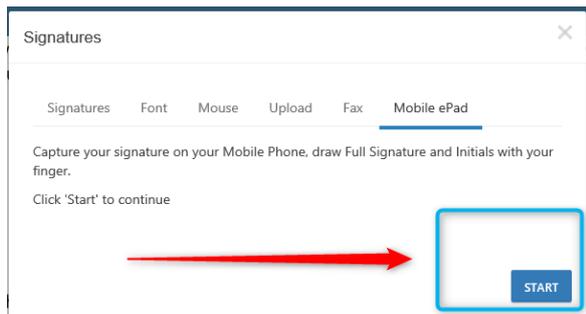
Mobile users can also click on My Signatures, from the left-hand menu. When they select this, they will view the same capture options as available to desktop users.

Mobile ePad

If you prefer to use a desktop but you want to draw your signature with your finger, same as a wet signature you can with our Mobile ePad capability. Use Mobile ePad to draw your signature on your mobile phone, and it will add these images to your Secured Signing process activated from a desktop.

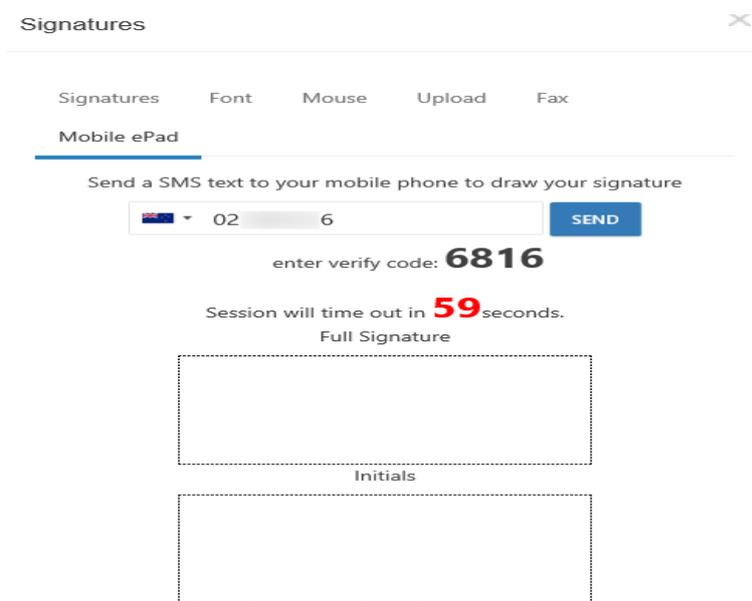
How to use Mobile ePad?

Prese Start, based on the account setup the link can be sent by SMS, or user enter the link in the mobile's phone browser.



With SMS

Enter your Mobile Number. Note: ensure you select the right country code



With a link:

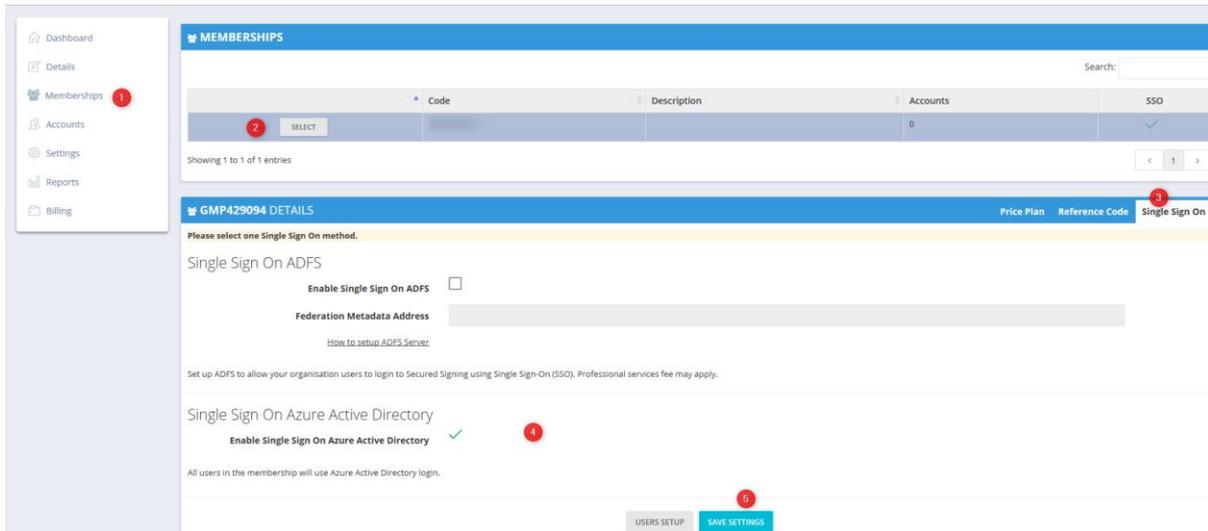
Entre the link in the mobile's phone browser.



In both options you will be asked to enter a code to initiate the mobile ePad functionality. Follow the instructions as prompted.

Azure Active Directory Single Sign On – SSO

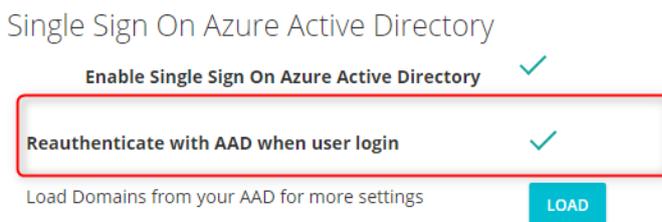
In case your organisation is using Azure Active Directory, you can connect your Secured Signing account to Azure AD login and then you don't need to login twice, only to your AAD.



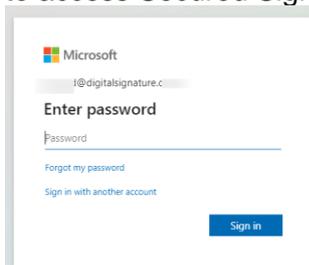
Learn how to setup Secured Signing Enterprise account and AAD at <https://www.securedsigning.com/support/sso/setupaad.aspx>

Re-authenticate in AAD SSO

For security reasons some enterprise organisation choose to authenticate users while accessing Secured Signing or signing documents. This means user needs to enter their Azure password.



This pop-up will appear every time an AAD User needs to access Secured Signing or a signing process as an invitee. Once they have passed AAD authentication they will be able to access Secured Signing.



Load domains from Azure AD

Load Domains from your AAD for more settings LOAD

Domain	Enabled AAD	Reauthenticate	AAD for Invitee	Block Register
securedsigning.com.au	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Freeway <input type="checkbox"/> Paid
securedsigning.onmicrosoft.com	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Freeway <input type="checkbox"/> Paid
securedsigning.com	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Freeway <input type="checkbox"/> Paid
dsx.co.nz	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Freeway <input type="checkbox"/> Paid
digitalsignature.co.nz	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Freeway <input checked="" type="checkbox"/> Paid

USERS SETUP SAVE SETTINGS

Enable Invitees to use AAD SSO

Admin users can set all invitees' types (Invitees, Witness) from an organisation's domains without a secured signing account to use Azure Single Sign On (SSO) when accessing Secured Signing documents to sign.

Load Domains from your AAD for more settings LOAD

Domain	Enabled AAD	Reauthenticate	AAD for Invitee	Block Register
securedsigning.com.au	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Freeway <input type="checkbox"/> Paid
securedsigning.onmicrosoft.com	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Freeway <input type="checkbox"/> Paid
securedsigning.com	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Freeway <input type="checkbox"/> Paid
dsx.co.nz	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Freeway <input type="checkbox"/> Paid
digitalsignature.co.nz	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Freeway <input checked="" type="checkbox"/> Paid

AAD for Invitee

EXCEPTIONS

Add Exceptions to AAD for Invitee within a Domain

Admin users can add specific email addresses to the 'Exceptions' list for each domain with 'AAD for Invitee' enabled. Email addresses added to this list will not use Azure Signing Sign On when accessing document to sign, instead using whichever authentication method the sender selected when sending the document.

Enterprise Account Status: Paid

How to setup ADFS Serv...

Set up ADFS to allow your organisation users to login to Secu...

Single Sign On Azure Active Director...

Enable Single Sign On Azure Active Directo...

Reauthenticate with AAD when user login

Load Domains from your AAD for more settings LOAD

Domain	Enabled AAD	Reauthenticate	AAD for Invitee	Block Register
securedsigning.com.au	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Freeway <input type="checkbox"/> Paid
securedsigning.onmicrosoft.com	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Freeway <input type="checkbox"/> Paid
securedsigning.com	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Freeway <input type="checkbox"/> Paid
dsx.co.nz	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Freeway <input type="checkbox"/> Paid
digitalsignature.co.nz	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Freeway <input checked="" type="checkbox"/> Paid

Block Register Accounts

Admin users can block any user from the organization’s domain from opening a paid or free account directly within the Secured Signing platform.

Users will then only be added from the Admin portal, Account -> add account / user

Load Domains from your AAD for more settings LOAD

Domain	Enabled AAD	Reauthenticate	AAD for Invitee	Block Register
securedsigning.com.au	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Freeway <input type="checkbox"/> Paid
securedsigning.onmicrosoft.com	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Freeway <input type="checkbox"/> Paid
securedsigning.com	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Freeway <input type="checkbox"/> Paid
dsx.co.nz	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Freeway <input type="checkbox"/> Paid
digitalsignature.co.nz	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Freeway <input checked="" type="checkbox"/> Paid

USERS SETUP SAVE SETTINGS

Block multiple invitees with same email

In Secured Signing you can invite different people with same email address, such as a husband and wife who are sharing same email.

Admin users can set up the membership/enterprise account to stop this feature. So, if a user from the organisation/enterprise account invites an invitee of any type that has already been invited in the past, the name and email must to match the original invitee details. If not the user will get an error next to invitee’s name in the WeSign invitation workflow popup

Invitation Workflow

An existing invitee with the same email has been already in the system. Review the invitees details to make sure they're correct.

Due Date ^o
23 Jun, 2020 4:50 pm

Signing Order Type ^o
 Sequential

Video Signing ^o
 Enable

Check Invitees

Password: 8776566565 Test EDIT Invitation Email

Test

Existing invitee already has same email

Video Confirmation ^o

Block Account Register

For enterprise accounts without SSO, you can also block users/ from your organisation’s domains from opening/registering for a Secured Signing free or paid account.

Domain authentication must already be completed, click on Manage Domain Authentication to start the process. If you’re unable to make the changes in your domain please contact the Secured Signing support team.

MEMBERSHIPS

Search:

Code	Status	Description	Accounts	SSO
<input type="button" value="SELECT"/>	Paid		2	<input checked="" type="checkbox"/>

Showing 1 to 1 of 1 entries

MEMBERSHIP DETAILS Price Plan Reference Code Single Sign On Settings

MEMBERSHIP SETTINGS

General Settings

Membership Description

Block multiple invitees with same email

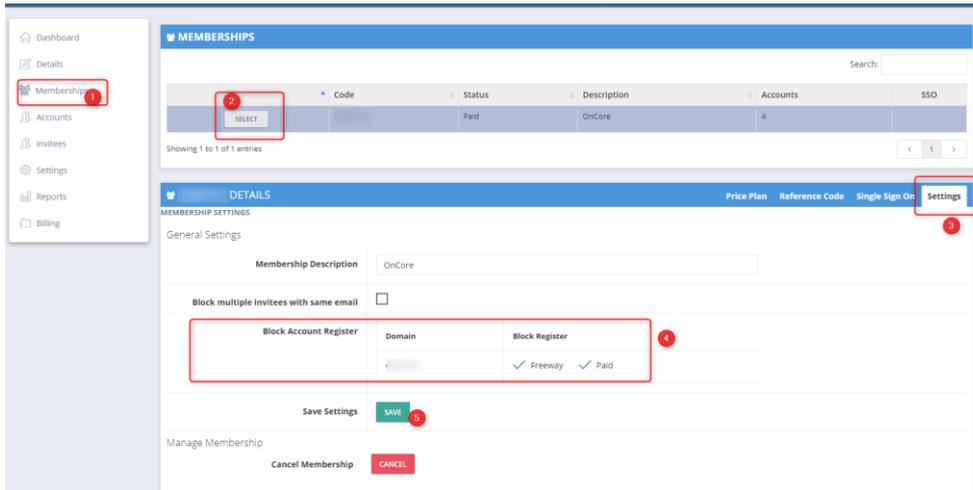
Block Account Register Please verify your domain by completing the Domain Authentication [OF MANAGE DOMAIN AUTHENTICATION](#)

Save Settings

Manage Membership

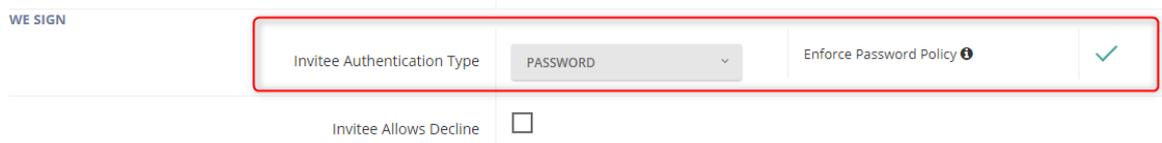
Cancel Membership

Once done select the domain and which type of account you want to block.



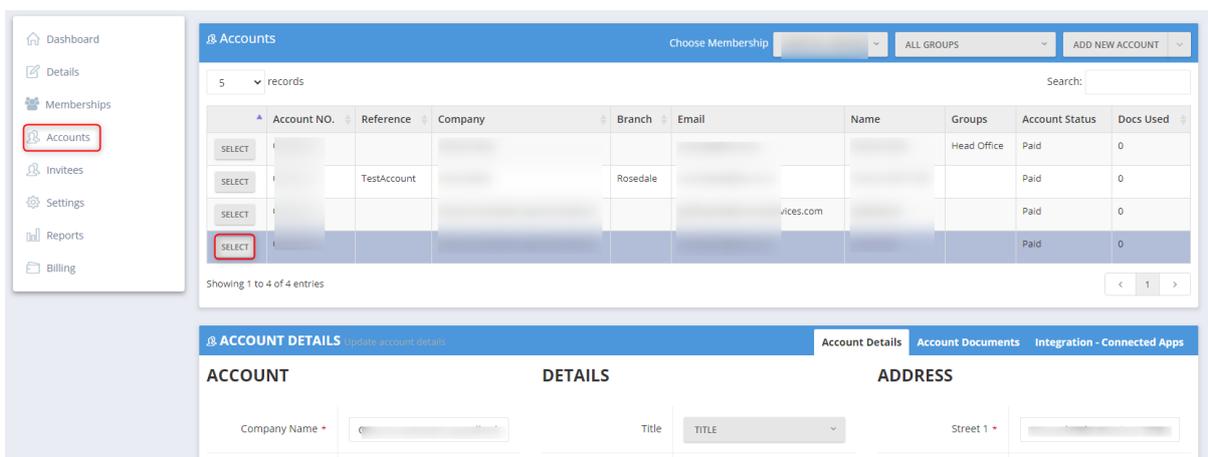
Invitee Authentication Type – Password Policy

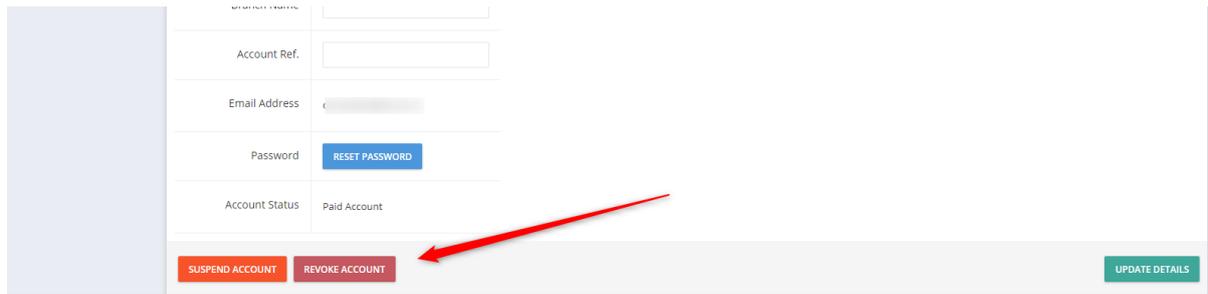
Setting Invitee Authentication type to ‘Password’, means the invitee needs to set up a password to access the document. If ‘Enforce Password Policy’ is enabled then every 90 days invitees will need to set up a new password. They also cannot use a password that has been used before.



Revoke Account - Users

To revoke a User please follow the steps below, revoking a user will free up a user license.





The screenshot shows a user management interface with the following fields and buttons:

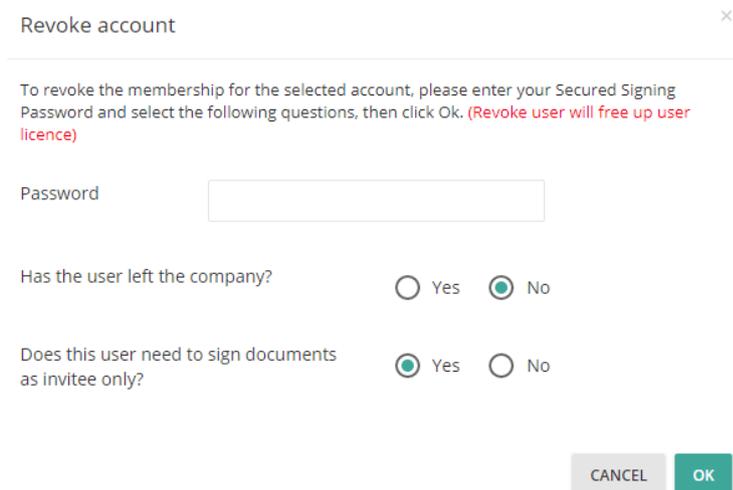
- Account Ref. (text input)
- Email Address (text input)
- Password (text input) with a **RESET PASSWORD** button
- Account Status (text input) showing "Paid Account"
- Buttons: **SUSPEND ACCOUNT** (orange), **REVOKE ACCOUNT** (red), and **UPDATE DETAILS** (green)

A red arrow points to the **REVOKE ACCOUNT** button.

A revoked user can't login to Secured Signing anymore or initiate a signing process/ send documents for signature, however they can sign as an invitee.

If the user stays within the organisation but doesn't need to send documents for signing, you can choose whether this user can sign as an invitee or not from the popup below

Admin portal user need to enter their password, but if the enterprise account uses SSO, a password is not required.



The 'Revoke account' popup contains the following elements:

- Title: Revoke account (with a close 'x' button)
- Text: To revoke the membership for the selected account, please enter your Secured Signing Password and select the following questions, then click Ok. (Revoke user will free up user licence)
- Form fields:
 - Password (text input)
 - Has the user left the company? (radio buttons for Yes and No, with 'No' selected)
 - Does this user need to sign documents as invitee only? (radio buttons for Yes and No, with 'Yes' selected)
- Buttons: **CANCEL** (grey) and **OK** (green)

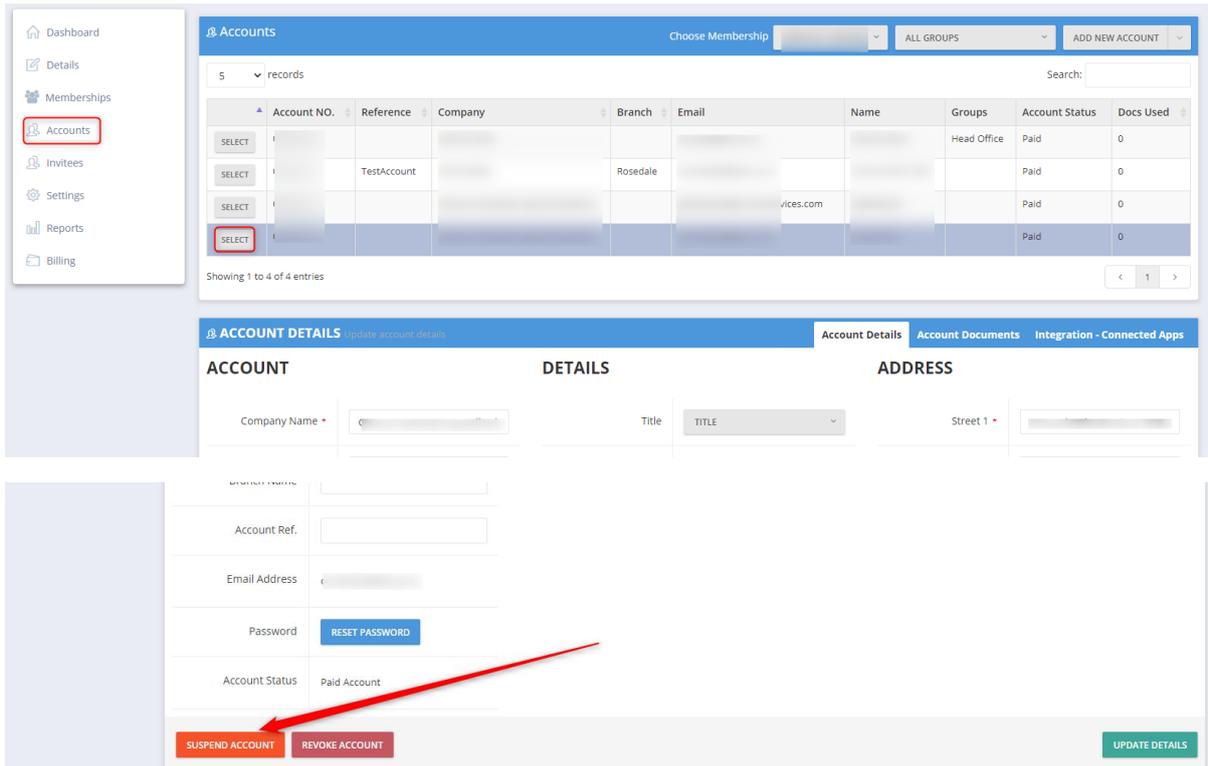
Unrevoked Users

Coming Soon

Suspend Accounts – Users

Suspend an account/user if the user is leaving, but will come back to work for the organisation, at this stage this user can't sign at all or login to Secured Signing.

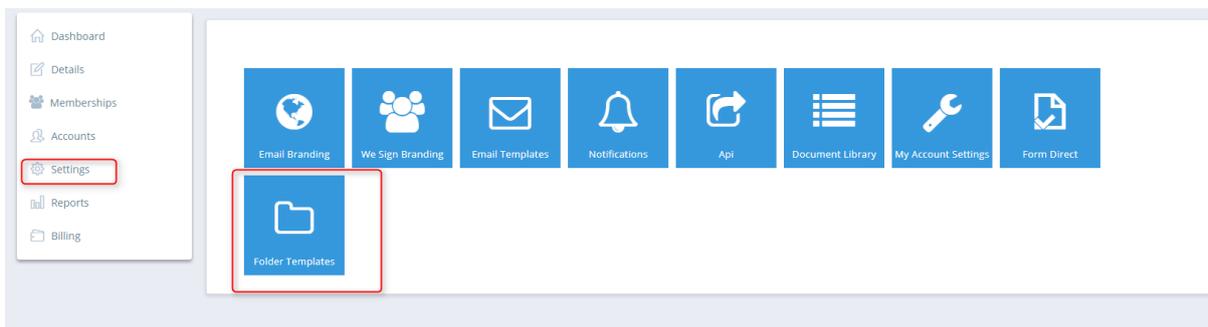
This process does not free up a user license.



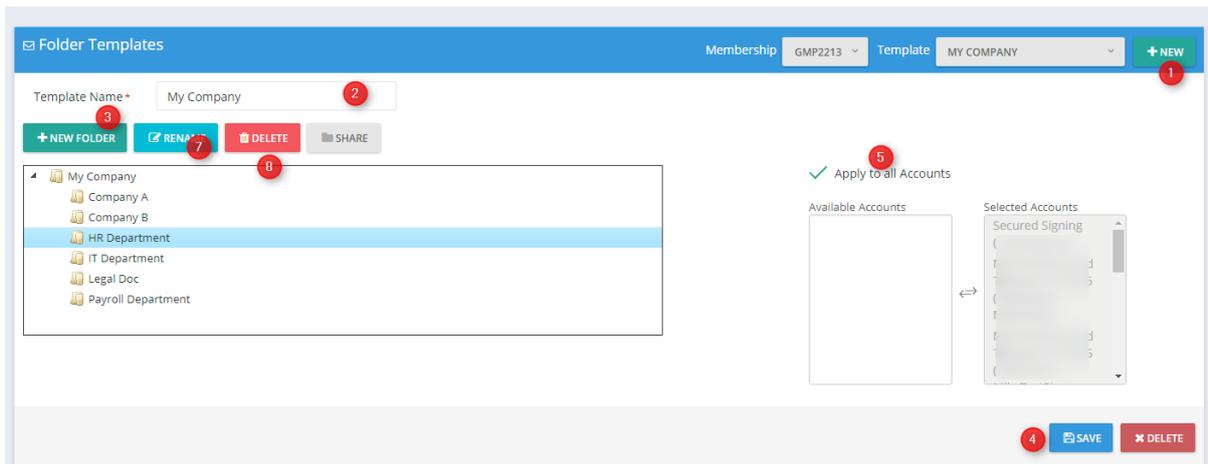
Folder

Enterprise Admin User can setup organisation folders structure template, this will be available and appear for accounts/ users in the membership / enterprise account, in addition to folders creates by the user at the account level. The organisation’s folders can’t be removed by any account user and can only be deleted by Enterprise Admin user and only if the folder is empty across the organisation.

The folder template creator location is in enterprise portal -> Setting - > Folder Template.



Admin user can create as many folder templates as needed and assign the folder template to the appropriate accounts. Look at Number 5 in the picture below.



Create new folder template, give it a name in the field (2) and save (4).

Create new folder name (3) and press enter or save.

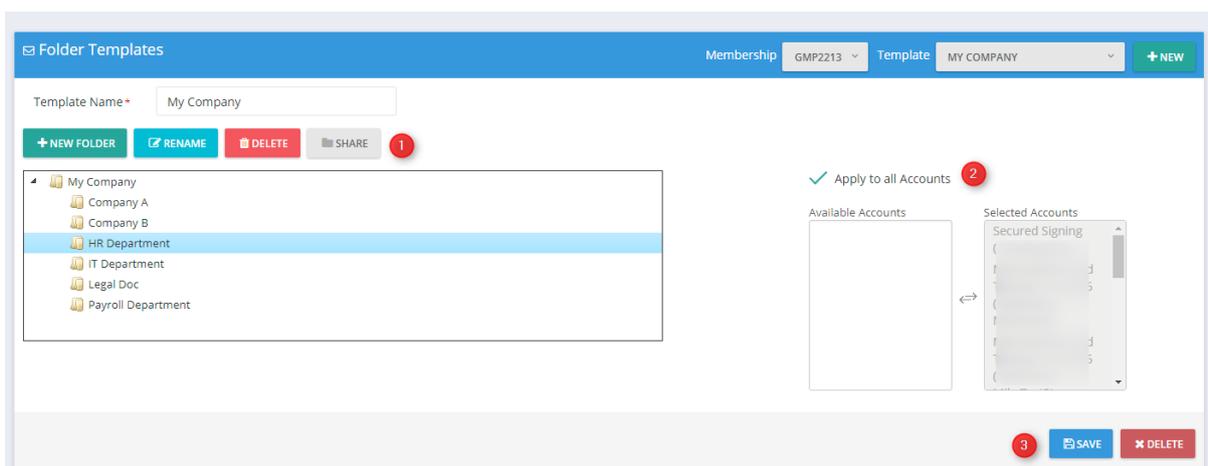
You can rename (7) folder name or delete folder (8) in case the folder is empty across all accounts.

To create subfolder, highlight the folder name and press New Folder (3).

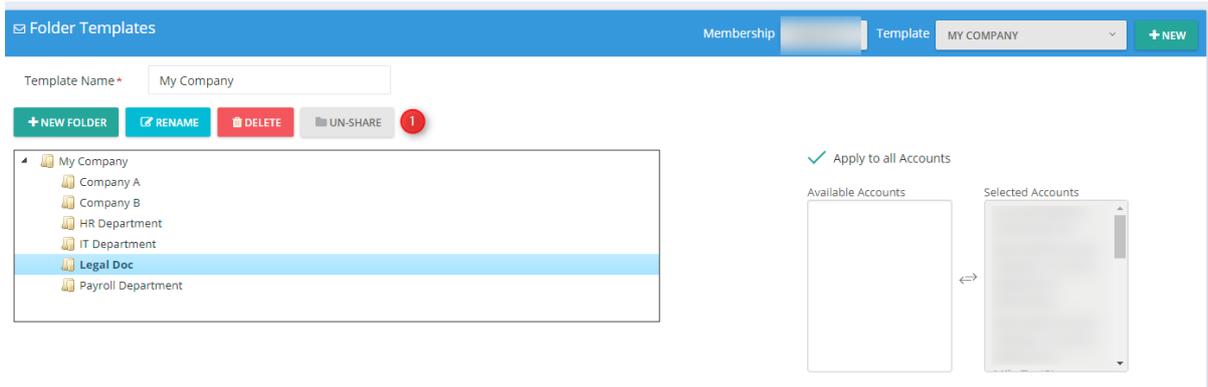
Shared Folder

Enterprise Admin User can share folders with all accounts or selected account in the organisation

To do so, highlight the folder press share (1), selected the account (2) and saved (3)



Once folder has been shared you can unshared (1) folder and presses saved



How shared folder works?

- Admin User can share folder with all accounts/ user in the enterprise account or with selected accounts/ user
- Then in the account level
 - Any document that is uploaded by any user to shared folder it will visible to all Account’s users.
 - A user who sent the document for signature becomes the document owner.
 - The document will be moved to in progress tab after it has been sent for signature and will be visible for all account’s user.
 - In Progress Tab there are few actions icons, any user will be able to complete one of these actions. However, delete function will be available for document owner only, but other user will be able to help in supervisor and manage the signing process.

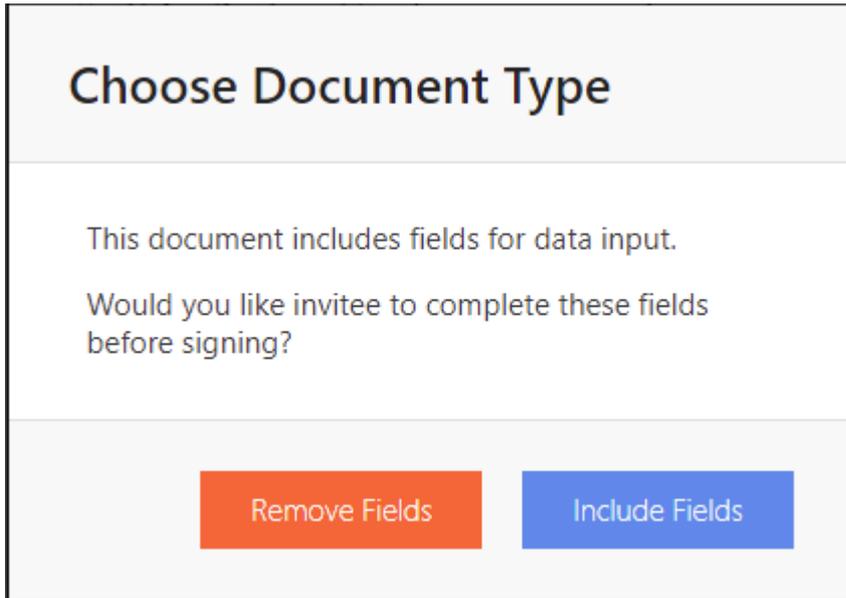
Actions



Once a user removed from a folder template and it is not share with him, all documents belong to the users will move to document owner Inbox.

Recognition of PDF Form Fields

We Sign process able to recognize form filed in PDF files, allow you to use them you can keep them or remove form the document to be signed.



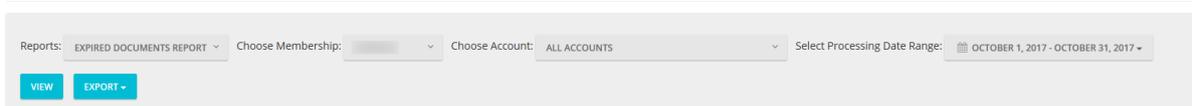
By default, this option is available

In case you set it to On , disable this function the question popup above will be gone and form fields will be flattened to the document without option for signer to enter anything in the form fields.

Enable Witness Download Document	<input type="checkbox"/>
Enable Assignment of Form Fields to any Invitee	<input type="checkbox"/>
Disable Recognition of PDF Form Fields	<input checked="" type="checkbox"/>

Reports

We added an Expired Documents Report. This report will show you which documents have not been signed and the due date has expired.

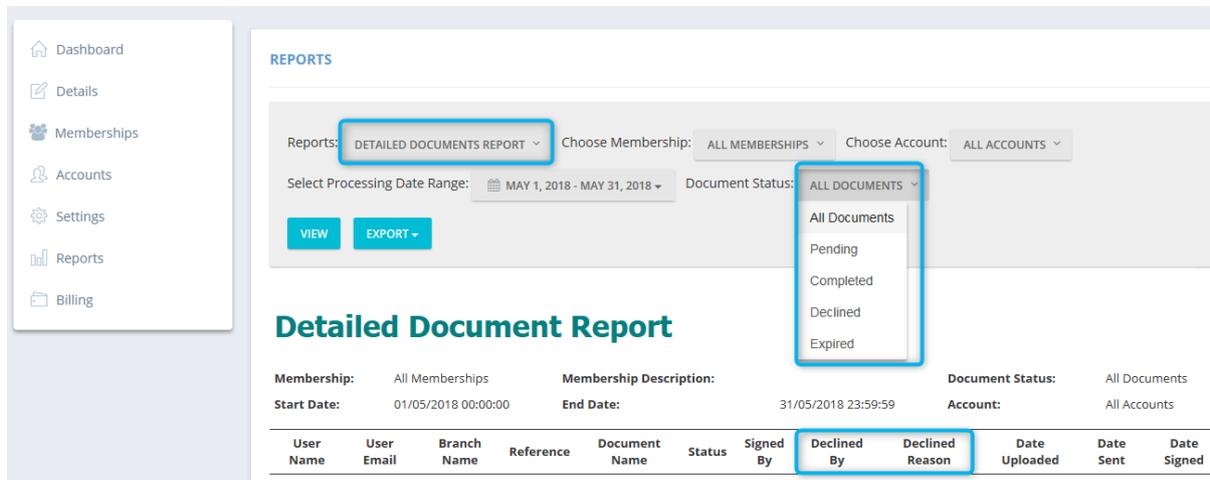


Expired Documents Report

Membership:		Membership Description:		Start Date:	01/10/2017 00:00:00	End Date:	31/10/2017 23:59:59	Account:	All Accounts																															
<table border="1"> <thead> <tr> <th>User Name</th> <th>User Email</th> <th>Branch Name</th> <th>Reference</th> <th>Invitee First Name</th> <th>Invitee Last Name</th> <th>Invitee Email</th> <th>Document Name</th> <th>Status</th> <th>Date Sent</th> <th>Due Date</th> </tr> </thead> <tbody> <tr> <td colspan="10">Report Created On: 30/10/2017 18:45</td> </tr> <tr> <td colspan="10" style="text-align: right;">Total Documents: 0</td> </tr> </tbody> </table>										User Name	User Email	Branch Name	Reference	Invitee First Name	Invitee Last Name	Invitee Email	Document Name	Status	Date Sent	Due Date	Report Created On: 30/10/2017 18:45										Total Documents: 0									
User Name	User Email	Branch Name	Reference	Invitee First Name	Invitee Last Name	Invitee Email	Document Name	Status	Date Sent	Due Date																														
Report Created On: 30/10/2017 18:45																																								
Total Documents: 0																																								

Detailed document report

Use this new report to get full information on all activity within your Account. You can filter this report by document status. We've also added a new column for decline by and decline reason.

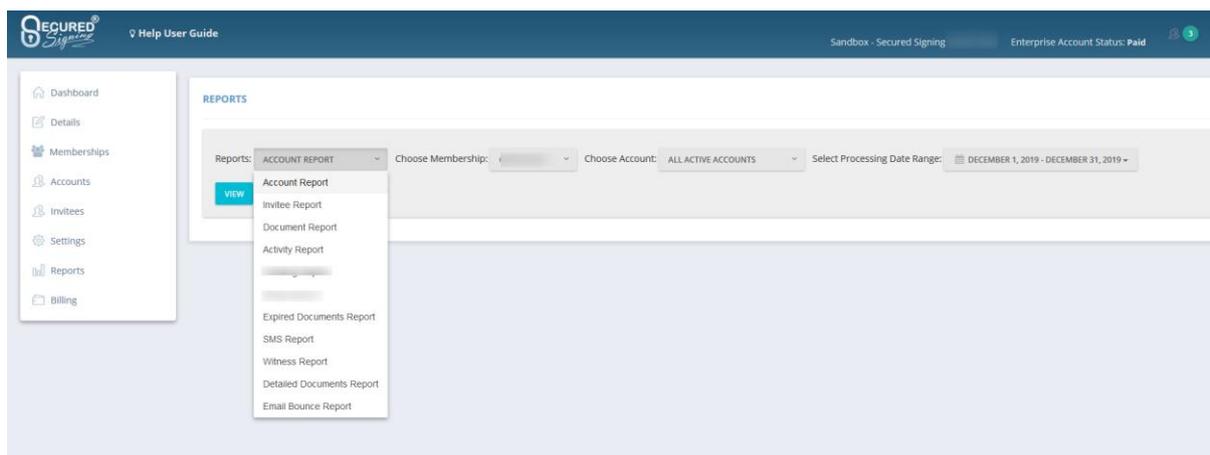


Revoked Users reports

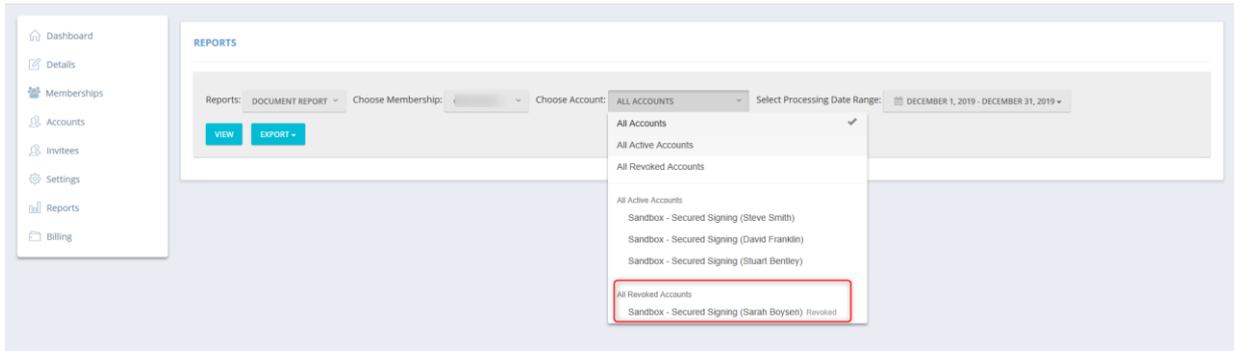
Once a has user left your company you may need to revoke this user to prevent them logging in to Secured Signing.

As an admin user you're able to generate and view reports for revoked users from the admin portal, this means you can always be on top of past actions related to these users.

The following reports are available for revoked users:



You can generate reports for all revoked users, or specific ones by choosing them from the drop-down menu.



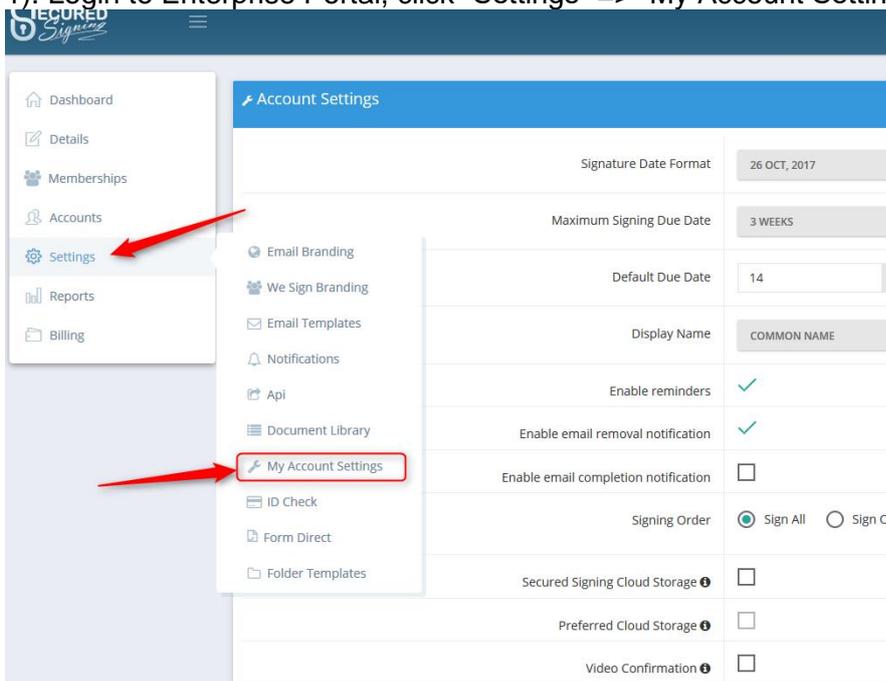
Reroute

Now you can setup to which invite type the reroute feature will show in the email invitation. You can define who in the organization has access to the reroute functionality.

Reroute Type Settings

1. Setup RerouteType => “Enterprise Accounts”

1). Login to Enterprise Portal, click “Settings” => “My Account Settings”.



2). Go down and find “**Invitee Allows Reroute**”, make sure it has been ticked first, after that, extra option shows: 1- **Anyone** (default), 2 – **Enterprise Accounts Only**.

Face2Face Signing	<input type="checkbox"/>	
Send SMS Notification	<input type="checkbox"/>	
WE SIGN		
Invitee Authentication Type	NONE	
Invitee Allows Decline	<input type="checkbox"/>	
Invitee Allows Reroute	<input checked="" type="checkbox"/>	<input type="radio"/> Anyone <input checked="" type="radio"/> Enterprise Accounts Only
Additional Notification Recipients	<input checked="" type="checkbox"/>	EDIT RECIPIENTS
Additional Completion Recipients	<input checked="" type="checkbox"/>	EDIT RECIPIENTS
Document Library	<input type="checkbox"/>	
Smart Tax Upload From PC	<input checked="" type="checkbox"/>	

For **Anyone**: invitee can be anyone.

For **Enterprise Accounts Only**: invitee can only be account user who belongs to this membership. If invitee doesn't belong to this membership, then there will be no "Reroute" button in the invitation email.

- Please have a look for reroute page when reroute type using "Enterprise Account Only".

RE-ROUTE YOUR INVITATION TO A DIFFERENT SIGNER

Please enter or select email of other members of the enterprise account only.

Email	<input type="text"/>	<input type="button" value="📧"/>
First Name	<input type="text" value="b"/>	<input type="button" value="👤"/>
Last Name	<input type="text" value="b"/>	<input type="button" value="👤"/>
Reason	<input type="text" value="Reason"/>	<input type="button" value="💬"/>

[REROUTE](#)

Click 'Reroute' to confirm your decision

Type at least 1 character in "Email" will trigger auto-complete list to show all account users belongs to the same membership and whose email address starts with the typed character. Now, you can choose the invitee name you want to reroute from the list. "FirstName" and "LastName" are disabled for typing; they only can be filled when you choose the proper invitee email address from the list.

Admin User Permission

Admin user can select different permission levels for other users in the Enterprise portal.

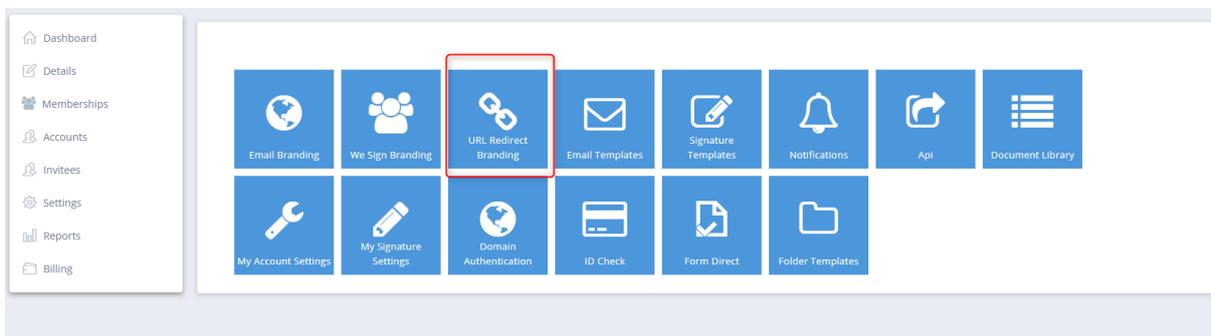
To add more users click add more user in the top menu at the dashboard page, select the permission level you want to assign to the additional user from admin, full or view only permission.

The 'Add User' form contains the following fields: Title (dropdown menu with 'Mr' selected), Email (text input), First Name (text input), Last Name (text input), Job Title (text input), Company Name (text input), and Permission (dropdown menu with 'Choose...' selected). At the bottom are 'CANCEL' and 'ADD' buttons.

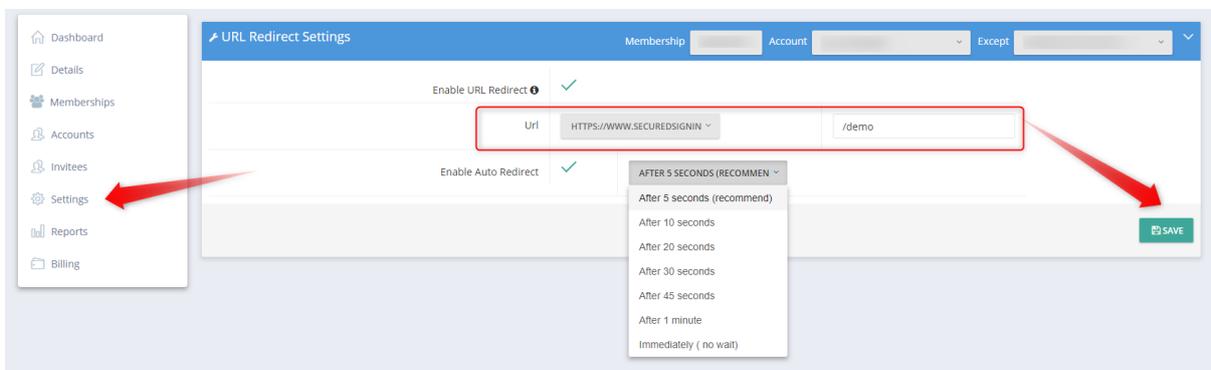
View only permission allows this user to view account information and documents with very limited functionality at the account's setup level

URL Redirect Branding

As part of your signing page branding and email branding, you can now redirect any invitees/signers on a document/s completion to your website in order to provide full company branding. This setting can redirect signers to any page you choose and is ideal for providing further instructions for signers after a document has been signed, or building a tracking system based on the chosen page.



In order to be able to set up URL redirect you need first to setup a [domain authentication](#).



Enter the page you want to redirect to, and choose how long they remain on the signing completion page.

Once done click save.