

SMART TAG GUIDE

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Smart Tags Guide

Secured Signing's capabilities can be embedded into MS Word and PDF documents using Smart Tags. The addition of Smart Tags into a template or document makes it Secured Signing ready. Single Smart Tag documents or batches of Smart Tag documents can be added to Secured Signing in a single transaction or sent for signing using the application programming interface (API).

What Are Smart Tags?

Smart Tags are a way of telling Secured Signing who should sign a document and where their signature should be placed in the document. Using Smart Tags takes away the need to manually position a signature block in your document. This makes it even quicker and easier to upload a batch of documents and invite people to sign them with just a few clicks.

Smart Tags can also be used to add fields in your document that are to be filled in before the document is signed.

Signature Smart Tag

A Smart Tag is just a piece of text in your document in the following format.

[!Sign.1.F.Notify.A.V.REVIEW.SMS.REASON.TITLE,FirstName,LastName,Email,+61,0412345678]

The Smart Tag allows you to set the following options.

1	The signing order. Use 1 for all Smart Tags for a non-sequential signing process. If setting a sequential signing order, all tags for the same person must have the same number.
F	Use the person's full signature
I	Use the person's initials
Notify	Send an email notification to document / account owner after the person has signed. Optional tag, it will be better to use additional recipient notification smart tag to notify.
SMS	Requires the signer to enter a code sent to the mobile phone number provided to be able to sign the document
A	Add attachment file to email invitation, from document library and upload on off document. See below for more information.
V	Add Video Confirmation to signing process
REVIEW	Review before signing, minimum time to read setup in account setting
REASON	Invitee will enter the signature intent, the reason for his signature should be type during the signing process, and it can be any text, that become part of the signature,
TITLE	Invitee require to enter Job Title during signing process, it will be part of the signature

All items after the comma reflect the details of the person who will be asked to sign the document at this point. If the details are left blank, you will be prompted to provide the signer's details when the document is added to Secured Signing.

A Smart Tag to invite James Bond to sign a document would be:

[!Sign.1,James,Bond,007@hmss.gov.uk]

Smart Tags to invite James to sign a document first and then have Ms Money Penny sign the document would be:

[!Sign.1,James,Bond,007@hmss.gov.uk]

[!Sign.2,Ms,Money Penny,moneypenny@hmss.gov.uk]

A dynamic Smart Tag that prompts for the signer's details each time the document is added to Secured Signing would be:

[!Sign.1,,,]

Signature Smart Tag with Witness

Secured Signing supports a witness process. An invitee can invite a witness to sign next to invitee's signature and provides witness contact details.

In case the witness witnessing an invitee with Video confirmation process in the signing process, witness will require to perform Video confirmation as well.

The format to add a witness requirement to a Signature Smart Tag is as follows.

[!Sign.1.F.Witness,FirstName,LastName,email]

For example, to invite James Bond to sign your document and to have his signature witnessed, the following Smart Tag can be used.

[!Sign.1.F.Witness,James,Bond,007@hmss.gov.uk]

It is important to remember the details in the smart tag are for the invitee not for the witness. As part of the signing process, the invitee will be asked for the details for their witness. The witness will then receive an invitation to sign the document as a witness. .

Watch our WeSign videos at <http://www.securedsigning.com/support/demo-videos/> to see how witness will digitally sign online.

Multiple Witness Signatures (New)

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. Just duplicate the witness smart tag at the position witness needs to sign

[!Sign.1.F.Witness,FirstName,LastName,email]

And add more smart tags at any places on the document as many as needed.

[!Sign.1.F.Witness,FirstName,LastName,email]

Multiple Witness Signatures for same invitee (New)

In case same invitee needs more than one witness you can identify them by number.

[!Sign.1.F.Witness,FirstName,LastName,email] - A
[!Sign.1.F.Witness1,FirstName,LastName,email] - B
[!Sign.1.F.Witness2,FirstName,LastName,email] - C

The order of witness would be A, B, and C.
Witness A has no numbers, so queues before B and C.

If witnesses orders are not starting with 1, the orders would be re-ordered starting from 1.
For example:

[!Sign.1.F.Witness,FirstName,LastName,email] - A
[!Sign.1.F.Witness2,FirstName,LastName,email] - B
[!Sign.1.F.Witness4,FirstName,LastName,email] – C

In this case, the order numbers of A, B, C would be 1, 2, 3 NOT 1, 2, 4.

Witness signing process for same invitee always will be in signing order, can't be defined otherwise.

Sign Face to Face Process (F2F)

Sometime the signatory is next to you and you want to get signature without sending email invitation, or you want to tell the signatory to visit your office / shop / branch in order to sign next to your staff.

In F2F process invitee needs to access the document with a code that will send to invitee's mobile phone. This action of sending SMS to a mobile number documents / recorded in document log. Account owner must to have SMS credits available.

[!Sign.1.F2F,FirstName,LastName,+64,021234567890]

Or

[!Sign.1.F2F,FirstName,LastName,email,+64,021234567890]

The Smart Tag allows you to set the following options.

!Sign.1	The signing order. Use 1 for all Smart Tags for a non-sequential signing process. If setting a sequential signing order, all tags for the same person must have the same number.
F2F	Face To face signing process
FirstName	Invitee first name
LastName	Invitee Last Name

Email	Optional, if email address is provided then email completion will send to F2F invitee
+64	Mobile Phone Country Code
Mobile Number	Invitee's mobile phone number in order to receive SMS authentication for document access

F2F Share Users

In order to share the Face To Face unique link you can add a share user who is part of a secured signing paid account, this user will be able to access F2F portal <https://www.securedsigning.com/Face2Face/Login> to access the signing process.

[!ShareUser.Sign=1,FirstName,LastName,emailaddress]

To share the link of multiple signatories please use this format

[!ShareUser.Sign=1&2,FirstName,LastName,emailaddress]

Witness - F2F signing process.

You can invite a witness to Face To Face process. The witness also will sign next to you or at the share user's premises. Witness needs to enter SMS code in order to access the document in F2F process.

[!Sign.1.F2F.WITNESS,FirstName,LastName,+64,021234567890]

Please Note: The witness details will enter by the invitee who required a witness during the signing process, in the smart tag above you need to enter Invitee's details in the F2F process.

Attachment

Secured Signing provides document library function. These documents are attached to email invitation as PDF file and has no extra cost.

Manage documents library in My Account -> My setting or for Enterprise Account login to Enterprise Admin Portal Settings -> Documents Library.

Each document in the library has a document number to identify the document in the library, this number can be up to 9 digits, and category.

Category is the way you group documents, attaching a category in the smart tag, all documents in the category will be attached to email invitation.

Standard Attachment process

[!Sign.1.A,FirstName,LastName,email]

In this smart tag process document's owner needs to select documents from the list he wants to attach to email invitation.

Attach specific document or multiple documents

[!Sign.1.A=211,FirstName,LastName,email]

This smart tag instructs to attach document number 211 from documents library.

[!Sign.1.A=211&212,FirstName,LastName,email]

This smart tag instructs to attach document number 211 and 212 from document library.

Attach document category – group of document

[!Sign.1.AC=Marketing,FirstName,LastName,email]

Attach to email invitation all documents in marketing category

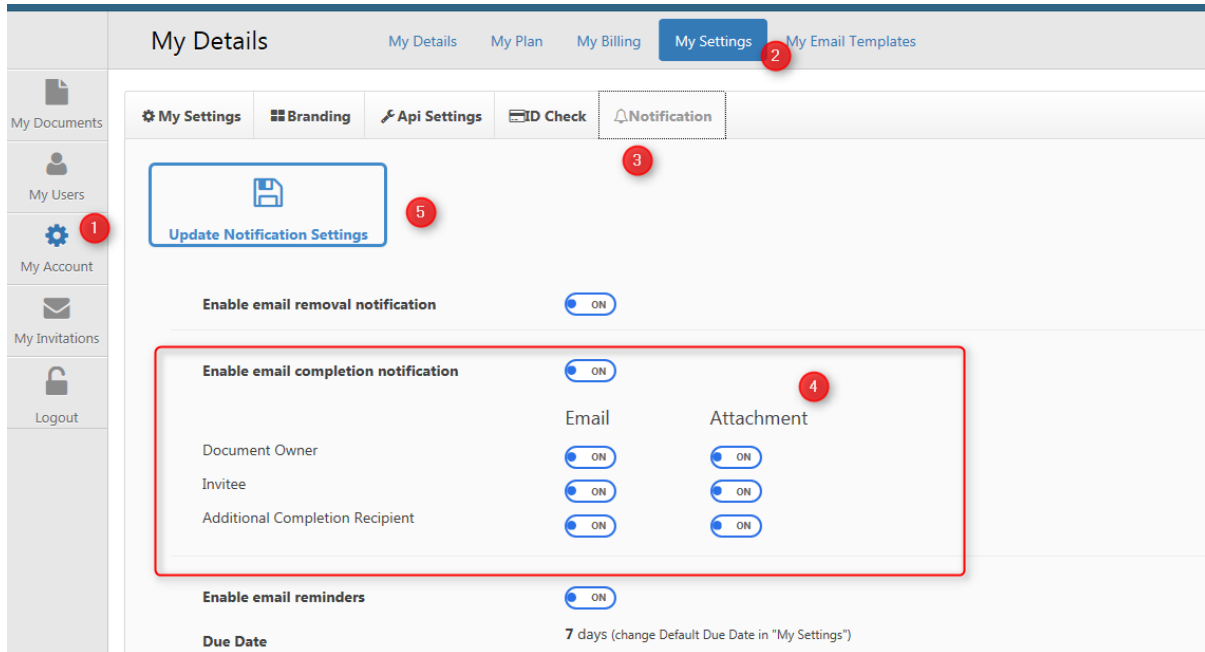
[!Sign.1.AC=Internal_policies,FirstName,LastName,email]

Attach to email invitation all documents in internal policy category. If the category name has more than one word use underscore between the words. Be sure that the category names in document libraries contains no underscore, dot or equals symbol, otherwise it would never match with smart tags.

If one or more documents categories are not found in document library, a warning message will show when processing smart tag document.

Enable Disable Invitee's email completion

To disable / enable sending completion email and attachment at the account level setup is in My Account -> My Setting -> Notification



Smart Tag control sending completion using as following:

The Completion Email tag supports Invitee & Stamper.

For invitee, the smart tag format:

[!Sign.1.CE=1,FirstName,LstName,emailaddress]

The smart tag "CE=[1/0/Yes/No]" means sending completion email to this invitee/ effective date stamper or not. The option of "1" or "Yes" enable sending completion email. Option of "0" or "No" disable sending.

below tags are considered available:

- CE=1
- CE=0
- CE=Yes
- CE=No

"Yes, No" options are case insensitive.

For Effective Date stamper, the smart tag syntax format:
[!EffectiveDate.CE=1]

Please note: invitee or effective date stamper without CE smart tag would be enable sending completion email by default.

ID Check Signature Smart Tag

The following variation of the Signature Smart Tag incorporates an ID Check for NZ Driver License, NZ Passport and NZ RealMe verified account into the signing process.

The ID Check process can include data matching verification using the signer's date of birth, driver's license number or passport number. During the ID check signing process, the data supplied in the Smart Tag is compared to the results of the government data returned from the ID check process. If there is a match, the signing process will proceed. If the data does not match, the signing process will be terminated.

The following format is used for a Signature Smart Tag with ID Check.

[!Sign.1.F.IDCHECK.Type,FirstName,LastName,EmailAddress,DataMatch]

If the type is not specified, the signer may select any of the ID check services available in Secured Signing. It is also possible to mandate the use of a specific ID check service for the signature process.

Specify ID Check type for invitee

RM	Real Me
NZDL	NZ Driver License
NZPASS	NZ Passport

For example, the following ID Check Signature Smart Tag will require the signer to verify their identity using the RealMe service.

[!Sign.1.F.IDCHECK.RM,FirstName,LastName,EmailAddress]

Data Matching

Specifying a data match type and the data to match will include verification of the data within the signing process. Where the data returned from the ID check process matches the data in the Smart tag, the signing process will proceed. If the data does not match, the signing process will be terminated.

The matching data available are:

DOB	Date of Birth e.g. DOB=DD/MM/YYYY
DLN	Drive License Number
PASSNU	Passport Number

For example, the following ID Check Signature Smart Tag with data match will ask the signer to verify their identity with the NZ Driver License service and match the date of birth on record with the date of birth supplied.

[!Sign.1.F.IDCHECK.NZDL,FirstName,LastName,EmailAddress,DOB=DD/MM/YYYYY]

Invitation sends by SMS Notification

Secured Signing allows sending invitation's link to signing online by SMS direct to invitee's mobile phone, as additional to email invitation link.

First you need to enable SMS notification in My Account -> My Setting. Please be sure you have SMS credit if not buy SMS credit, auto top up setting is recommended to avoid SMS sending issue.

Add TextLink to the smart tag

See below example:

[!Sign.1.TextLink,FirstName,LastName,EmailAddress,61,0123456789]

When using TextLink in smart tag, the mobile country and mobile number is required. An error would popup if using TextLink without mobile. However, user still can input the mobile number in the popup and continue if the smart tag will look like

[!Sign.1.TextLink,FirstName,LastName,EmailAddress]

Additional Recipients Notification Smart Tag Syntax

Additional recipients receive notification about the signing process but do not sign the document. There are three types of additional recipients. The notification additional recipient will be notified that the invitation to sign has been sent and the signing process is complete. A completion additional recipient will receive notification of the completion of the signing process along with a copy of the signed document. An additional recipient may also be assigned a reviewer role.

The syntax for a Smart Tag for an additional recipient and an additional recipient with a reviewer role are as follows.

[!Recipient.N,FirstName,LastName,email]

[!Recipient.C,FirstName,LastName,email]

[!Recipient.N.RW,FirstName,LastName,email]

N Notification Additional Recipient

C Completion Additional Recipient

RW Reviewer Additional Recipient

An additional recipient with a reviewer role will be notified prior to any invitations to sign being issued. The notification will include a link to take the reviewer to the additional recipient portal where they can review and approve the document. Once the reviewer has approved, the invitees will receive the invitation to sign online.

[!Recipient.N.RW.SMS,FirstName,LastName,email,61,0123456789]

The above smart tag will send SMS pass code to reviewer's mobile phone in order to access the document

Notification at invitee Level

In case of multiple invitees, additional recipient needs to be notifying for a specific invitee only or needs to review a particular invitee. The syntax for a Smart Tag for an additional recipient and an additional recipient with a reviewer role are as follows.

[!Recipient.N=X&Y.RW=Y,FirstName,LastName,email]

Or

[!Recipient.N=Y.RW=Y,FirstName,LastName,email]

N=X&Y	Notification Additional Recipient for email invitation sent out for sign-X and sign-Y. Add as many invitees are needed.
RW=Y	Reviewer Additional Recipient - email to review send out before invitee Y will get email invitation to sign. The signing order must to be Sequential, be sure you have number to each signer, sign1, sign2 etc.

Form Field Smart Tag

You can also use Smart Tags to add both text fields and checkboxes to your document. The person invited to sign the document can fill in these fields and check the boxes before signing. If you make a field mandatory, it must be completed before the person will be able to sign.

Just like a Signature Smart Tag, the Field Smart Tag is just a piece of text in your document in the following format.

[!Field.Text.R.Width.Height]

[!Field.Text.R.120.20]

Multi lines text box - [!Field.MultiLineText.O.430.240]

Position the tag at the bottom of the multiline box.

Text Defines the field as a Text Box

Setting the field type is mandatory. All other values are optional

R Required (makes the field completion mandatory before signing)

O Optional

Width	Width of text box (can be any value, 120 is default),
Height	Height of text box (can be any value, 20 is default)
	Dimensions are in points

[!Field.Checkbox] – adds a check box

Checkbox Defines the field as a Checkbox

[!Field.Date] – add a Date field

Pre-Fill Form Field Smart Tags

You may also wish to pre-fill Smart Tag form fields with a default value to make it quicker and simpler to fill the fields in your document or form. By refilling the Smart Tag with the details you already know, the customer does not need to fill this field if the information is correct, but still give the customer the option to update the information if it is incorrect. You are also able to designate the data mapping of this field to your core business software.

The data entered to the field on the document or form will be updated to the designated field in your software system when calling Secured Signing via the API.

The formats to add a default value, placeholder text and to designate the data mapping to your (client side) software system is as follows.

[!Field.Text.R.W.H,DefaultValue,Placeholder,ClientField]

[!Field.MultiLineText.R.W.H,DefaultValue,Placeholder,ClientField]

[!Field.Checkbox.R,DefaultValue,ClientField]

[!Field.Date.R,DefaultValue,Placeholder,ClientField]

Only available when called via API

[!Field.DropDownList.R.S,DefaultValue,Placeholder,ClientField]

The core options for field type, required or optional and size of the field are detailed above. The following are the additional options for enhanced Form Field Smart Tags.

DefaultValue The default value for this field

DefaultValue Yes, ticked or No (if it's blank means No, unticked)
(Checkbox)

Placeholder The text showing in the field if the value is empty

ClientField	The field name at client end system, field identity when getting data back
S	Single selection, only applicable to dropdown list, by default if missing
M	Multi selection, only applicable to dropdown list
API	Pass the dropdown list items and values through send smart tag API https://www.securedsigning.com/developer/api-documentation#!/SmartTag/SmartTagRequest the ListItems property "ListItems": [{ "Item": "", "ClientField": "", "Value": "" }] . Get the field data back after document signed https://www.securedsigning.com/developer/api-documentation#!/Document/FieldDataRequest

Effective Date

Legal industry requires entering effective date after all parties have been signed. Secured Signing is offering an Effective Date process and keeping all digital signatures valid. The effective date stamper can be any invitee or document owner. Only one effective date can be added to the document.

Add one of the following smart tags anywhere on the document.

[!EffectiveDate]

Document owner will enter effective date, from in progress folder or from email invitation

[!EffectiveDate.SMS]

Document owner will enter effective date, from in progress folder or from email invitation. SMS Pass Code will send to document owner mobile phone to access the document online. The mobile phone number will enter in the Smart Tag wizard manually.

[!EffectiveDate.SMS,FirstName,LastName,Email,MobileCountry,MobileNumber]

An Invitee will enter effective date, from in progress folder or from email invitation. SMS Pass Code will send to document owner mobile phone to access the document online.

[!EffectiveDate.SMS,FirstName,LastName,Email]

An Invitee will enter effective date, from in progress folder or from email invitation. SMS Pass Code will send to document owner mobile phone to access the document online. The mobile phone number will enter in the Smart Tag wizard manually.

Designing Your Smart Tag Document

When you upload your Smart Tag document to Secured Signing, all tags will be replaced with a default signature block. This will show the person's graphical signature, their name and the date and time they sign the document.

The default signature block is approximately 120 points by 60 points. The bottom left of the signature block will be placed where your smart tags starts. Make sure you allow enough white space in your document above the Smart Tag for this to occur.

The following represents how the signature block will be placed relative to the Smart Tag



You can resize signature block on your document by adding W for width and H for height in points

[!Sign.1.W=100.H=50,FirstName,LastName,EmailAddress]

Document negotiation

Secured Signing allows invitees to do a document negotiation online. The process has two pashas, 1st one is approval with electronic signatures and once all parties approved the changes a digital signature process will start to seal the document with invitee's signatures.

First of all enable in My Account -> My Setting -> document negotiation and buy credit. Each process has a cost on top on the document cost.

In the document negotiation process invitee able to:

- Add a text box
- Add a footnote
- Strikethrough – to delate text
- Add a page
- Send to advisor – helping invitee to review and make document's changes
- Decline to document negotiation
- Approve and sign with electronic signature



To initiate document negotiation process using smart tag just add this tag anywhere on the document.

[!Doc.Neg]

Questions

Smart Tags are a great automation tool that will make it even quicker and easier to get your documents signed. So give it a go!

We also have demonstration videos for using Smart Tags. You can view them at:

<http://www.securedsigning.com/support/demo-videos/>

If you have any questions please don't hesitate to get in touch.

support@securedsigning.com