TRANSACTION DESK Advanced



www.alignedaxis.com

Updated July 2023

Aligned Axis Transaction Desk Advanced



#1: CREATE TEMPLATES

- 1. Create a Template
 - a. Add Checklist, Contacts, Documents, and Forms
 - b. Attach to Teams/Sharing
- 2. Add a Template to a new Transaction
- 3. Add a Template to an existing Transaction

#2: CREATE CLAUSES

- 1. Create a Clause
- 2. Add a Clause to a Form

#3: AUTHENTISIGN LAYOUTS

- 1. Creating Layouts
- 2. Applying Layouts

#4: AUTHENTISIGN FUNDAMENTALS

This section will demonstrate the fundamentals of **how to send an e-Signature packet using Authentisign**, as well as the customer's signing journey, and how to specify additional signing details, such as the **signing name**, **expiry date**, **automatic reminders**, and **other options**.

- 1. Update your e-signature for pre-signing documents
- 2. Update the name of the signing
- 3. Set an expiration date for the signing
- 4. Set an automated signing reminder
- 5. Update the New Authentisign ID position
- 6. Clear signing fields and markups

#5: SPECIFY ADDITIONAL SIGNING OPTIONS

This section you will then learn **how to specify additional signing details, set expiration dates and automated signing reminders**, as well as clear signing fields and markups.

Transaction Desk Advanced #1

CREATE TEMPLATES

Before you begin

You require TransactionDesk Edition for brokers, and you require Super User access to create transaction templates for an office. You can, however, share a transaction template with your team members using the Sharing option.

Notes:

- Before you can share a transaction template with a group or team, the group or team must first be defined.
- Before you can add a checklist to a template, the checklist template must be defined.

ACTIVITY

- 1. In the navigation bar, click **Templates.**
- 2. Click Transaction Templates. The Transaction Templates page opens.
- 3. Click Add. The Create Transaction Template page appears.

Close	Create	Save
Ownership:	Personal V]
Name *]
Туре	- None -]
Description	Description	

- Use the Ownership dropdown to select who owns this template: Personal if it is for your own use, or to be shared with your team, or PRINCIPAL/MANAGING BROKERS ONLY:
 Office if it is to be available to all agents in the office.
- 5. In the Name field, give the template a meaningful name, such as Residential Listings.
- 6. Use the **Type** dropdown to select the type of transactions this template should be used for.
- 7. Optional: In the **Description** field, enter a description for the template.
- 8. Click Save.

🔿 Detail		
Ownership:	Personal	•
N *	Desidential Listings	
Name	Residential Listings	
Туре	Residential Listing	•
Description	Description	
	Update	

Transaction Template

Checklists	+
⊘ Contacts	+

- To add a checklist to the template that would be common to all transactions of that type, in the Checklists section, click +. The list of checklists appears. Select one or more checklists, and click Add. Any transactions created from this template have the checklists attached automatically.
- 10. To add a contact to the template that would be common to all transactions of that type, such as escrow company, in the **Contacts** section, click + and create or select the contact. Any transactions created from this template have the contacts added automatically.
- 11. To add the documents that are typically required for this type of transaction, in the Documents and Folders section, click +.

- a. If you want to add individual documents, select **Add document**, add the documents, and click **Save**.
- b. If you want to add a folder to organize the documents, select **Add folder**, give the folder a name, and click **Save**.
- c. If you want to add a document to a folder you created here, click on the folder name to open the folder. Then click +, select Add document, and add the documents that you want in that folder, and click Save.
- 12. To add the forms that are typically required for this type of transaction, in the Forms section, click + and locate and select (check) the forms. Click Add. Any transactions created from this template have the forms attached automatically.

Notes:

- a. You can click more options, and then click **Delete** to remove a form from the template at any time.
- b. Outdated forms are indicated as "This form has been disabled." These forms are not applied when the template is used.
- 13. To share this template with your team, in the Sharing section, click +.

	Sharing	Save
Brad's Shares	 → → → → → 	~

- a. In the left column, select the name of the group to share with.
- b. Click the right arrow to add the group to the list to share with.
- c. Click Save.
- 14. Click Update.

ADD A TEMPLATE TO A NEW TRANSACTION

- 1. From the Dashboard, click Create Transaction.
- 2. Enter a Name for the transaction.
- 3. Click the drop down arrow under **Template** \rightarrow Select the desired template
- 4. Import Data (optional)
- 5. Select the desired option under Add me as the
- 6. If desired, check Use Wizard
- 7. Click Create

Close	Create Transaction	Create
Name *	Training - 123 Maple Street	
Template	TRAINING: Residential: Buyer Packet	•
Import Data (optional)	RealTracs (Web API)	•
	123456	
Add me as the	Selling Agent	•
	Use Wizard	

ADD A TEMPLATE TO AN EXISTING TRANSACTION

- 1. From the dashboard, click on the **Transactions** $\stackrel{\frown}{\square}$ icon from the Navigation Bar.
- 2. Select the transaction.
- In the upper toolbar, click the menu button, click Apply template
- 4. Select the desired template.
- 5. Click Apply



Transaction Desk Advanced #2

CREATE A CLAUSE

In the navigation bar, click Clauses	
Clauses	
Personal Clauses	
Office Clauses	
System Clauses	

ACTIVITY

Create a clause for your own personal use, click **Personal Clauses**.

	Clauses	Search	J↑	+ Add
	Back To Home			
	Viewing Personal Clauses			
□ <u>If</u>				
□ <u>If</u>	you have the permissions, create a clause for the office t	o use, click Offi	ce Cla	auses
□ <u>If</u>	you have the permissions, create a clause for the office t Clauses	o use, click Offi e	ce Cla ↓↑	auses +
□ <u>If</u>	you have the permissions, create a clause for the office t Clauses	o use, click Offi e	tî n	auses + Add

When adding Clauses, always check with your Broker. They may have the Brokerage Attorney review the Clause before it can be utilized. REMEMBER: You are NOT an Attorney, and therefore you CANNOT write legal verbiage for the Agreement / Amendments.

Click +Add	→ Add new clause	
Close	Create Personal Clause	Save
Title*		
Content*	≟≣ •≣ ⁺≣ Insert Hour Insert Minute Insert Date	
	May 20.000 characters	

- □ In the **Title** field, give the clause a meaningful title.
- In the Content field, enter the text of the clause. Use the formatting functions to create bulleted lists, numbered lists, or indent the text. You can insert Hour, Minute, or Date placeholders as applicable. When the clause is used, the user is prompted to enter a value for any placeholders.

EXAMPLE:



When the clause is inserted into a field in a form, the user is prompted to enter values,

as shown here:



Click Save.

ADD A CLAUSE FOLDER

1. In Personal Clauses or Office Clauses → Click +Add → Add new folder

Close	Create Personal Clause Folder	Save
Folder Name *	I	
¥		
Close	Create Office Clause Folder	Save
Folder Name *		

- 2. In the Folder Name field, specify a meaningful name for the folder.
- 3. Click Save.
- 4. Open the Folder, and + Add desired clauses.

Transaction Desk Advanced #3

AUTHENTISIGN LAYOUTS

Create a layout when you frequently apply the same signing fields and markups to the same documents in the same locations. Creating a layout enables you to set up those signing fields and markups in advance and then apply them to a document with a single click, saving you valuable time manually setting up each field and markup on each document every time.

You can update, copy, or delete a layout at any time after you create one, and can apply it to a signing as soon as you create it.

<u>Notes:</u>

- Your layout must have a minimum of:
 - 1 document
 - 1 Signer-type participant (or a Myself participant)
 - 1 Signing field

CREATING A LAYOUT

- 1. From the Navigation Bar, click on **Signings**.
- \Rightarrow 2. Open the right hand menu in the upper right corner , and select Layouts. ⊘ 🙆 💆 ⇒ ⇒ 🚺 TransactionDesk All Team Members \bigcirc Lavouts Signing Layouts J↑ + Add Search Classic New Roles Buyer 1 Buyer 2 + 1 More RF 302 Confirmation ... Modified: 2/9/23 3:04 PM Created: 2/9/23 3:00 PM L 000 Print Driver Tracking History RF 304 Disclaimer No... Modified: 2/9/23 3:00 PM Created: 2/9/23 3:00 PM Buyer 1 Ð 000 RF 401 Purchase and ... Modified: 2/9/23 3:00 PM Created: 2/9/23 3:00 PM Ċ Buyer 1 000 RF 625 VA/FHA Loan ... Modified: 2/9/23 3:00 PM Created: 2/9/23 3:00 PM Buver 1 8 Ē

3. Click +Add.

Close	New Signing Layout	Save
Layout Name *		

- 4. Type a name for the layout so you can easily locate it later in the Layout Name field.
- 5. Click Select a Document or Form



6. Do one of the following:

Click Drag & Drop files here or click to upload to select the document from your

computer's file manager.

Drag and drop documents from your computer into the Drag & Drop files here or click to upload area.

Upload / Import	My Files	
Drag and drop	ocuments here or click to upload	
ADD DOCUMENT FROM *		
My Computer		
Google Drive		
Dropbox		
OneDrive		
Box		

Click Add Document From...

- Click **My Computer** to select the document from your computer's file manager.
- □ Click **Google Drive, Dropbox**, **One Drive**, or **Box** to select the document from your cloud-based accounts.
- Click Email Upload

Email Upload Information	×
You can use the Authentisign email contact below to forward any document file (pdf, doc, xls) or ima file (jpg, png, gif) to be signed.	age
<u>Open in Email Client</u> Email : layout_0d3a1b75-10c0-ed11-ba77-14cb652f4f5b@uploads.authentisign.com	

7. Additional Documents can be found under **My Files** → **Documents**

Select a Document or Form	×	
Upload / Import	My Files	
All Documents		
Documents	>	All Documents / Documents
Single Forms	>	Inbox Folder
		My Folders
		Shared Documents
	CLOSE	Transaction Folder \rightarrow

CLOSE

8. My Files → Single Forms holds Individual Forms from the Tennessee REALTORS® &

Transaction Forms from previous transactions you have created.

Select a Document or Form	×	<
Upload / Import	My Files	_
All Documents		
Documents	>	
Single Forms	>	
		All Documents / Single Forms
		Individual Forms
	CLOSE	Transaction Forms \rightarrow

9. In Authentisign, select **Tools** and assign **Signer Actions** to the Form or Document.

B1 Buyer 1 (Buyer) Signer Actions (what's This?) Image: Sign HERE Image: Text LINE Image: CHECKBOX	Signing Tools		×	DOCS		Signing Tools ×
Signer Actions (What's This?) SIGN HERE I INITIALS I T TEXT LINE I CHECKBOX INITIAL PAGES I INITIAL CHOICE I RADIO CHOICE I R	B1 Buyer 1 (Buyer)		•	≡		B1 Buyer 1 (Buyer)
SIGN HERE INITIALS T TEXT LINE CHECKBOX INITIAL PAGES INITIAL CHOICE RADIO CHOICE DROPDOWN Signer Fields (What's This?) B1 FULL NAME MUTO TIME AUTO DATE AUTO TIME B1 Buyer's Lawyer (Buyer's Lawye) B2 Buyer's Lawyer (Buyer's Lawye) B3 Buyer's Lawyer (Buyer's Lawye) B1 Buyer's Lawyer (Buyer's Lawye) B2 Buyer's Lawyer (Buyer's Lawye) B3 Buyer's Lawyer (Buyer's Lawye) B4 Buyer's Lawyer (Buyer's Lawye) B2 Buyer's Lawyer (Buyer's Lawye) B3 Buyer's Lawyer (Buyer's Lawye) B4 Buyer's Lawyer (Buyer's Lawye)	Signer Actions (/hat's This?)		TOOLS		B1 Buyer 1 (Buyer1@auth)
T TEXT LINE Image: CHECKBOX Image: CheckBox	SIGN HERE					B2 Buyer 2 (Buyer2@auth)
INITIAL PAGES INITIAL CHOICE INITI		СНЕСКВОХ				B3 Buyer 3 (Buyer3@auth)
INITIAL PAGES INITIAL PAGES INITIAL PAGES INITIAL PAGES Image: Initial Pages Image: Initial Pages <td>-</td> <td></td> <td></td> <td></td> <td></td> <td>B4 Buyer 4 (Buyer4@auth)</td>	-					B4 Buyer 4 (Buyer4@auth)
Image: Choice Image: Choice Image: Choice Image: Choice <td>INITIAL PAGES</td> <td>V INITIAL CHOICE</td> <td></td> <td></td> <td></td> <td>B1 Buyer's Lawyer (Buyer's Lawye)</td>	INITIAL PAGES	V INITIAL CHOICE				B1 Buyer's Lawyer (Buyer's Lawye)
Signer Fields (what's This?) B3 Buyer's Lawyer (Buyer's Lawye) FULL NAME Mathematical ADDRESS B4 Buyer's Lawyer (Buyer's Lawye) auto DATE AUTO TIME Landlord 1 (Landlord1@a)	RADIO CHOICE					B2 Buyer's Lawyer (Buyer's Lawye)
Signer Fields (what's This?) B4 Buyer's Lawyer (Buyer's Lawyer) FULL NAME MAIL ADDRESS L1 Landlord 1 (Landlord 1 @a) AUTO DATE AUTO TIME L2 Landlord 2 (Landlord 2 @a)	Signer Fielde					B3 Buyer's Lawyer (Buyer's Lawye)
AUTO DATE						B4 Buyer's Lawyer (Buyer's Lawye)
AUTO DATE AUTO TIME L2 Landlord 2 (Landlord 2 (Landlord 2 (@a))		EMAIL ADDRESS				L1 Landlord 1 (Landlord1@a)
	AUTO DATE	AUTO TIME				L2 Landlord 2 (Landlord2@a)
\rightarrow	T AUTO DATE				\rightarrow	L2 Landlord 2 (Landlord2@a)

REQUIRED	REQUIRED
B1-Sign Here	B2-Sign Here
CLIENT/CUSTOMER MM/dd/yy at h:mm tt o'clock = am/ = p Date	pm MM/dd/yy at h:mm tt o'clock = am/ = pm Date

APPLYING A LAYOUT

- 1. Open a transaction from the navigation menu.
- 2. Start a new Authentisign by clicking +Add
- 3. Name the Signing
- 4. Add Signers (you need at least one signer for Layouts to apply)
- 5. Add Documents
- 6. In the toolbar, click LAYOUTS.



7. Select Apply Layouts



- 8. Select the Layout Name you would like to apply to the document.
- 9. Click Assign Signature Layouts

NOTES:

Transaction Desk Basic #4

CREATING AN E-SIGNING PACKET IN AUTHENTISIGN

Create a signing when you need to send documents and forms to be signed by various participants so you can successfully close a transaction.

As the creator of the signing, you have the option to sign your documents before sending, in order to speed up the signing process. However, this option only applies to signing fields that you manually place, as opposed to those that are placed automatically as the result of applying a layout. If you need to sign layout fields, you must still add yourself as a signer-type participant and complete the signing after it is sent out, as per usual.

ACTIVITY

- Navigate to Signings *k* from the Navigation bar, and click **+Add**.
 - The Send to **Create Signing** popup opens.

Close	Create Signing	Save
Signing Name *		
<u>Add to Transaction</u> optional		

- Type a name for the signing in the Signing Name field that enables you to easily recognize the purpose of the signing. For example, you can use the property address or intended recipient's name.
- Click Add to Transaction, check the transaction you need, and click Save if you need to select one of your existing transactions to associate the signing with.
 Note: You can associate the signing with a transaction at a later date if needed.
- Click Save.

ADDING SIGNERS, FORMS, AND DOCUMENTS



- SIGNERS: <u>Add a participant to the signing.</u> For example, if you need to get a listing agreement signed, you can add the seller to the signing.
 Note: Each signing must have a minimum of one Remote signer-type participant.
- DOCS: <u>Add documents and/or forms to the signing.</u> For example, if you need to get a listing agreement signed, you can add it to the signing.
 Note: Each signer-type participant must have at least one document or form to sign.
- **TOOLS:** Add signing fields and markups, such as highlighting and strikeout to the documents and/or forms. For example, you can add places for the seller to sign their name, initial, and date the listing agreement.

Note: Each signer-type participant must have at least one signing field to sign on each document. The signing field must come from the Signing Actions section of the TOOLS panel.

- LAYOUTS: Use layout to add pre-placed signing fields and markups to your documents.
- **OPTIONS:** You can set up additional options such as signing expiration dates and automated reminders.

If you need to save your signing and finish working on it, or send it at a later date, click **BACK**, and then click **Save**.

When you are finished adding participants, documents, and signing fields and are ready to send the signing to all participants, click **NEXT**.

ACTIVITY

Your customer/client is ready to sign the forms and documents for their offer/listing. Think about which scenario you utilized in the previous activity, and tailor this activity to fit your scenario.

Then, do the following:

- Add Signers → Ensure the customer/clients are **Remote Signers**. If there is another agent involved, you can add them and assign them to **CC**. If another decision maker is involved, but not signing documents, assign them as **Reviewer**.
- Add Documents needing signatures

REVIEW TOOLS

The markup tools allow you to mark on the documents before they are sent to the signers.

Markup (What's This?)
A TEXT BOX	HIGHLIGHT
N LINE	Co FREEHAND
	O ELLIPSE

ACTIVITY

Text Box

- Scroll to a document that would require a **TEXT BOX** to be added.
- \Box Click **TOOLS** \rightarrow Click **Text Box** \rightarrow Click on the document where the text box should be located.
- □ Change the font size, color, font family, alignment (as needed)
- □ Toggle **Bold**, *Italic*, and/or Transparent Background
- Click Save as Default Settings

Line

- Click **Line** from the tools
- \Box Draw a line on the document \rightarrow Unclick Line from the tools
- $\hfill\square$ Click the line on the document \rightarrow Change the color to **GREEN**
- Change the **Stroke Width** to 4
- Click Save as Default Settings

Strikethrough

Click Strikethrough
□ Draw on the document → Unclick Strikethrough from the tools
\Box Click on the strikethrough to open editing tools \rightarrow Change color to RED \rightarrow Change stroke width
Try to move the line at an angle. What happens?
Click on the Line and move at an angle. What happens?
Highlight
Click Highlight
\Box Draw on the document \rightarrow Unclick Highlight from the tools
\Box Click on the highlighted section \rightarrow Change color to YELLOW and Opacity to 0.25
Click Save as Default Settings
Freehand
Click Freehand
Draw on the document
Click on freehand and move it around the document
Click DELETE
Ellipse
Click Ellipse
Draw a circle around something on the document.
\Box Unclick Ellipse \rightarrow Click on the circle and change the color to BLUE
Move the circle to another item on the page and shrink the circle by dragging from the corner

NOTES:

ADDING AND ARRANGING PAGES

When working on an e-signing you have the ability to add multiple documents to one signing, making it easier for the signers to click to sign all documents on one email.

Documents and Forms	×	SIGNERS
1 RF 301 Working with a Real E <	Document Name RF 301 Working with a Real Estate Professional	E Docs
2 FF 401 Purchase and Sale A >	REPLACE FILE REMOVE FILE	TOOLS
ADD A DOCUMENT OR FORM ASSIGN CHECKLISTS	Layout (What's This?) Use layouts to automatically place blocks for Signers by their Role type. RF 301 Working with a Real Estate Professional	EV LAYOUTS
	APPLY REMOVE MAP SIGNERS	OPTIONS
	Link to a TransactionDesk Checklist Item Select a checklist item	? FEEDBACK
	Drag and drop pages to reorder or click SELECT to select multiple pages that you wish to delete. SELECT	
	 The second second	

ACTIVITY

- Click on **Docs**
- \Box Move the order of your documents around
 - □ Grab and Slide
 - \Box Change the number in the box
- □ Click **Replace File** and change one of your documents/forms out for a different file
- □ Link the document to a TransactionDesk Checklist Item
- Grab a page and move it around with another page
- □ On the bottom of page 1, click on the ...
 - □ Rotate the page 360 degrees
 - Click View Page What happens?_____
 - Click **Delete**
- Click Remove File What happens?_____

SIGNER ACTIONS

Signer actions assign to the signer you have selected and require their interaction to be complete. You can either click/tap or drag-and-drop to add to your document.

Note: Each signer is assigned their own color.

Signer Actions (What's This?)		Signer Actions (What's This?)		
SIGN HERE				
	СНЕСКВОХ		СНЕСКВОХ	
INITIAL PAGES		INITIAL PAGES	V INITIAL CHOICE	
RADIO CHOICE		RADIO CHOICE		

ACTIVITY

Select a signer from your list.

- Drag-and-Drop their **SIGN HERE** to a signature line on the document.
- □ Click/Tap their Initials onto the bottom right corner of the document

□ On the top left corner, Drag-and-Drop the **Text Line**

- □ The text line will prompt the signer to fill in with their reply during their signing.
- □ Toggle **Required** on
- □ Toggle **Transparent Background** on
- □ Toggle **Multi-Line** on \rightarrow Then, click and drag the corners of the text box to make a square.
- □ Click **Duplicate** and move the second text line to the top right corner.
- \Box Click the duplicated text box \rightarrow Select the **Trash Can** and **Delete** the duplicate
- Drag-and-Drop a **CHECKBOX** to an item on the document
- Click INITIAL PAGES
 - □ Adjust the initial size
 - Align the initials to the **Bottom Right** on the **Bottom of the Document**
 - □ Select all signers
 - Select documents requiring initials on every page
 - Click Place Initials

Drag-and-Drop the INITIAL CHOICE to a blank space on the documer	nent
--	------

- □ This will prompt the signer to initial one or the other.
- Drag-and-Drop the **RADIO CHOICE** to a blank space on the document
 - □ This will prompt the signer to select one or the other.
 - □ Click on one of the radio buttons \rightarrow another radio choice button
 - \Box Click the **trash can** button to delete the added radio button
 - □ Slide the **SCALE** bar in the right toolbar to make the radio button larger or smaller

00

and click the + button to ADD

X

WF - Dropdown

If you'd like to keep these settings in place moving forward, click Save as
 Default Settings

Drag-and-Drop the **DROPDOWN** to a blank space on the document

- □ Enter a list of options in the **Define Options** dialog box
- □ Toggle to Require or Not Require the dropdown

SENDING FOR E-SIGNATURES

In the top right corner, Click NEXT

< BACK NEXT >

To set **Expirations and Reminders**, select a date and time when prompted.

Finalize Signing Setup

You're almost done! To further customize your signing invitation, use the options below.

Expiration and Re	eminders		
Expires on 3/28/2023	at 11:59 PM		
Send reminder every <u>1 -</u> da	ysat <u>9 👻</u> AN	1 -	
	CANCEL	CUSTOMIZE INVITES	SEND

Click on **Customize Invites** to personalize your message to the signer. Add a *Subject* and type a *personalized message* to the signer. When complete, click **Save**, and then click **Send**.

Customize invitation emai	l
Fred Flintstone	
Remote Signer	
Email:	Subject:
kaylapierson.realtor@gmail.com	Offer Packet & Disclosures
Message: Save Message Import Message	
$\mathbf{B} I \underline{\cup} \vdots \checkmark \overset{1}{\underline{-}} \checkmark \backsim \checkmark$	
Fred, the following documents include the offer we signature. If you have any questions, please give n Kayla P.	e discussed, along with the sellers property disclosures for your ne a call to discuss further.
Characters: 203 / 5000	
Wilma Flintstone	
Remote Signer Email:	Subject:
kaylapierson.realtor@gmail.com	Offer Packet & Disclosures
Message: Save Message Import Message	
$\mathbf{B} I \underline{\cup} := \mathbf{v} \stackrel{1}{\underset{2}{=}} \mathbf{v} \Leftrightarrow \rightleftharpoons$	
Wilma, the following documents include the offer	we discussed, along with the sellers property disclosures for your
	CANCEL

NOTES:

SAVE

×

Transaction Desk Advanced #5

SPECIFY ADDITIONAL SIGNING OPTIONS

When creating a signing you can take the following actions for that specific signing:

- Update the e-signature and initials that you use when pre-signing documents before sending them to participants.
- Update the signing name.
- Set an expiration date for the signing that all participants must complete the signing by.
- Arrange for automatic email reminders to be sent to participants at pre-arranged intervals.
- Set the position that the New Authentisign identification number will occupy on each page of each document in the signing. The ID number is unique and is automatically added to each signing.
- Clear all signing fields, annotations, and markups that you have already added to the signing, including those applied as part of a layout.

Note: You can only specify these details before the signing is sent.

ACTIVITY

Navigate to Signings and click the name of the signing you need to specify additional details for.



□ In the toolbar, click **OPTIONS**.

Options	×
Change Signature	>
Signing Details	>
Expiration Dates	>
Reminders	>
Authentisign ID Position	>
Clear Signing Fields, Signing Actions, and Markups	>

□ In the Options panel, do the following:

□ Update your e-signature for pre-signing documents

□ Update the name of the signing

 $\hfill\square$ Set an expiration date for the signing

□ Set an automated signing reminder

Update the New Authentisign ID position

□ Clear signing fields and markups

Update your E-Signature for Pre-Signing Documents

1. Click Change Signature.

The Participant Acknowledgment popup opens.

artic	pant Acknowledgement	
By clickin that you a <u>Lone Wolf</u> Applicabl the docur presented represent signing a process.	g 'I accept', you acknowledge that you have read, an gree to (i) to the <u>Consumer Consent Disclosure</u> , the <u>Terms of Service</u> , and the <u>Supplemental Terms</u> to <u>Electronic Signature Products</u> , (ii) agree to have the stat are subject of this e-signature process in electronic form, and (iii) approve the electronic ation of your signature and initials for use when y document in this Authentisign e-signature	
I Accept		
	LDo Not Accept	

- 2. Click I ACCEPT.
- 3. Select the Font desired, Draw your signature, or Upload a signature.
- 4. Check the box Remember my signature for future signatures.
- 5. Click Set Signature.

Create your signature		×		
Styles	Draw	Upload		
Please select a font from the "Font" dropd signature. Click "Set Signature" to confirm	own to style your signature, or use the "Draw" or your signature.	"Upload" tabs above to create a custom		
Font:				
Rage Italic	~			
Signature		Initial		
Kayla F	R. Piers	on KRP		
By clicking "Set Signature", I agree that the signature and initials appearing herein will be my legal signature for purposes of using this Lone Wolf Electronic Signature Product, and any Document I execute using this electronic signature will have the same effect as if I had signed my name or initials manually.				
Remember my signature for future signature	gnings	SET SIGNATURE		

Update the Name of the Signing

- 1. Click Signing Details.
- 2. Type the updated name of the signing in the **Signing Name** field and click **SAVE**

CHANGES.

Options		×
Change Signature	>	Signing Details Edit the details of your signing
Signing Details	<	Signing Name
Expiration Dates	>	Utter Packet - 222 Rocky Way
Reminders	>	CANCEL SAVE CHANGES

Set an Expiration Date for the Signing

- 1. Click Expiration Dates.
- 2. Use the calendar menu to select the date and time that the signing expires.

Notes:

- Every signing must have an expiry date.
- Expiry dates are set for 30 days from the current date by default, but can be set to any date you need.
- The signing always expires at 11:59 PM on the date specified.
- When a signing expires, participants that try to access the signing after the expiry date receive a notice that the signing expired and cannot complete the signing.

3. Click **SAVE CHANGES**.

Change Signature	>	Expiration Dates Set up an expiration date for your signing
Signing Details	>	Expires on <u>4/10/2023</u> at 11:59 PM
Expiration Dates	<	CANCEL SAVE CHANGES

Set an Automated Signing Reminder

- 1. Click Reminders.
- Select Send reminder every, and use the dropdowns to select how often and at what time of day the reminders are sent.
- 3. Click **SAVE CHANGES**.

Signing Details	>	Reminders Set up reminders for sent documents
Expiration Dates	>	 Do not set a reminder Send reminder every v days at v
Reminders	<	
Authentisign ID Position	>	CANCEL SAVE CHANGES

Update the New Authentisign ID Position

- 1. Click Authentisign ID Position.
- 2. Use the position dropdown to select whether you need the New

Authentisign ID number in the <u>top left</u>, <u>top right</u>, <u>bottom left</u>, or <u>bottom right</u> of each page of each document.

Note: By default, the ID is placed in the top left corner of each page of each document.

3. Click SAVE CHANGES.

Signing Details	>	Authentisign ID Position Choose the location of your Authentisign ID
Expiration Dates	>	Top Left 🔹
Reminders	>	CANCEL SAVE CHANGES
Authentisign ID Position	<	

Clear Signing Fields and Markups

1. Click Clear Signing Fields and Markups.

Signing Details	>	Clear Signing Fields, Signing Actions, and Markups Choose whether you want to clear all the annotations or all the markups on the document CLEAR SIGNING FIELDS CLEAR MARKUPS CANCEL
Expiration Dates	>	
Reminders	>	
Authentisign ID Position	>	
Product Tour	>	
Clear Signing Fields, Signing Actions, and Markups	<	

2. Do any of the following:

□ Click **CLEAR SIGNING FIELDS** if you need to remove any signing fields, such as initial fields, from all pages of all documents.

Click **CLEAR MARKUPS** if you need to remove any markup fields, such as

highlighting, from all pages of all documents.

3. The Clear all markups popup opens and prompts you to confirm that you need to remove the signing fields or markups.



4. Click **DELETE**.

The signing and markup fields are removed from all pages of all documents.

Note: This includes all fields that were added from a layout.

NOTES: