



# Adding e-Signatures to a Template

Help Guide

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# 1. Adding e-Signatures to a Template

E-Signatures can be used in 2 ways:

- Set up a template with e-signature fields with the expectation of e-signing
- Manually add e-signature fields to a document post-generation OR any external document

These instructions are for setting up a template with e-signature fields with the expectation that the generated document will be sent for e-signature.

When creating a template that requires signatures and e-signing is permitted, it's recommended that the template is set up with e-signature fields so that this functionality is readily available, even if rarely used. The insertion of the fields in the template is a very quick process compared to having to manually do this later.

## 1.1 Setting the Signatories

E-Signatures are automatically available for all Name type fields that have contact mapping applied. For example:

A screenshot of a 'Contact Fields Map' dialog box. The dialog has a title bar with 'Contact Fields Map' and a close button (X). It contains three rows, each with a yellow border. The first row is titled 'Full Name' and has a dropdown menu with 'Recipient - full name:'. The second row is titled 'Company Name' and has a dropdown menu with 'Recipient - company name:'. The third row is titled 'Trust Name' and has a dropdown menu with 'Recipient - trust name:'. Each dropdown menu has a small downward-pointing arrow on the right side.

No specific fields need to be created for the e-Signature details. These fields will already be available in the Word Add-In for all mapped contacts.

## 1.2 Contact Mapping for Signatories

When setting up individual contacts, apply contact mapping to the name field to create the connection as a signatory.

## 1.3 Field Types

The e-signature fields/components available are:

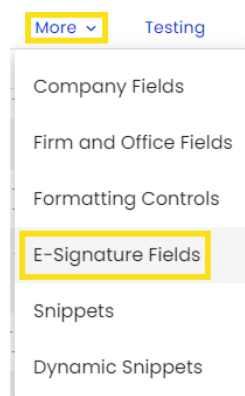
- **Signature:** Allows the recipient to upload a digital file or select one of the default options
- **Name:** Automatically inserts the full name of the recipient
- **Initials:** Allows the recipient to upload a digital file or select one of the default options
- **Date:** Automatically inserts the date of e-signing
- **Capacity:** Role when signing for a company
- **Checkbox:** Allows the recipient to tick a checkbox

You will be able to select the specific component required when you are inserting the fields using the Word Add-In.

## 1.4 Inserting e-Signature Fields into the Word Template

E-Signature fields will be available in the Smarter Drafter Word Add-In for all mapped contacts.

1. Go to More
2. Click on e-Signature fields.



The available contacts who can be signatories will be listed.



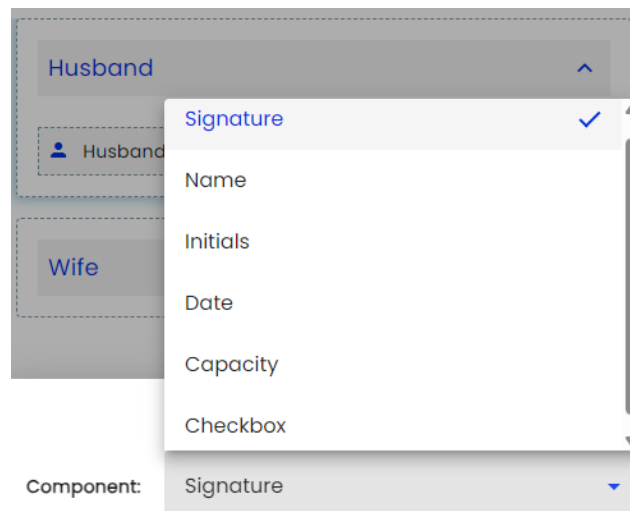
The screenshot shows the 'E-Signature Fields' dropdown menu. The menu is open, displaying three options: 'Husband', 'Wife', and 'Company'. Each option is followed by a downward-pointing chevron icon. The 'E-Signature Fields' label in the dropdown is highlighted with a yellow box.

If you see the following error, you need to check your contact mapping settings.



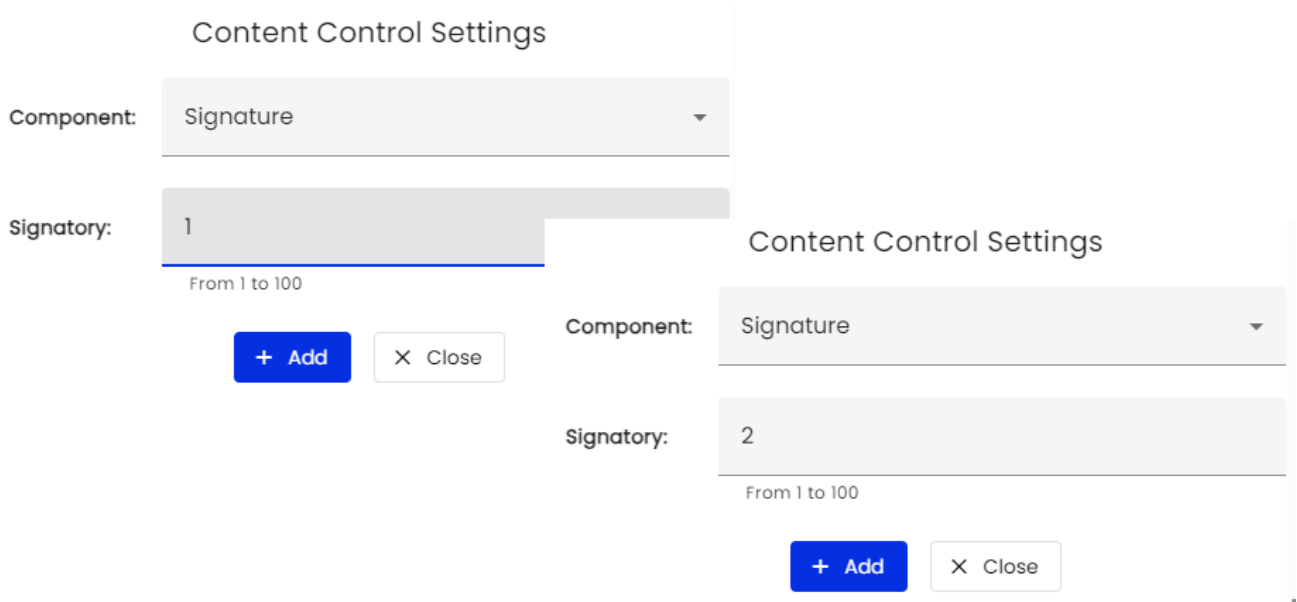
The screenshot shows the Smarter Drafter interface for an 'Employment Contract' form. The 'E-Signature Fields' dropdown is open. A yellow box highlights an error message: 'There are no fields in the form that can be used with e-Signatures.'

Select the signatory and click the ellipsis on the right side of the name field. For individuals, select the component and click add to insert the field into your template.



The screenshot shows the 'Husband' signatory selected. A dropdown menu is open, showing the following options: 'Signature' (with a checkmark), 'Name', 'Initials', 'Date', 'Capacity', and 'Checkbox'. The 'Component:' field at the bottom is set to 'Signature'.

For companies, you will need to select the component and the specific signatory if you have allowed for multiple signatories.



## 2. Template Example

E-signature fields appear as light green content controls in the Smarter Drafter MS Word Add-In. Text will come in as per the formatting in your Word document.

Image sizes are determined by the spacing and formatting. For example, the size limit and spacing of a line or the size of a table cell.

### Husband & Wife signatures¶

Full-Name¶	Capacity¶	Signature¶
☐([*])¶	Husband¶	☐([*])¶
☐([*])¶	Wife¶	☐([*])¶

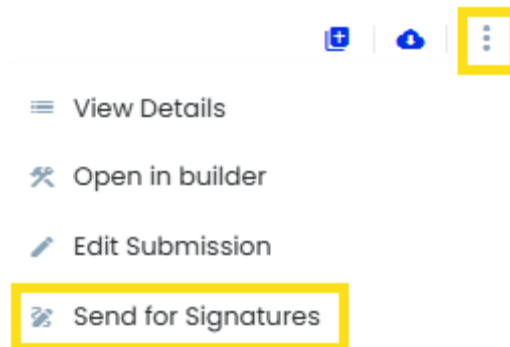
Company-Signatory #1¶	Company-signatory #2¶
Signature: → ☐([*])¶	Signature: → ☐([*])¶
Name: → ☐([*])¶¶	Name: → ☐([*])¶¶
Initials: → ☐([*])¶¶	Initials: → ☐([*])¶¶
Date: → ☐([*])¶¶	Date: → ☐([*])¶¶
Capacity: → ☐([*])¶¶	Capacity: → ☐([*])¶¶
Checkbox: → ☐☐¶	Checkbox: → ☐☐¶

## 2.1 Send the Document for Signatures

Once a document has been generated, you can send it for signature.

Go to the form **submissions** list and locate your **submission**

1. Click on the **ellipsis** (three vertical dots).
2. Select **Send for Signatures**.




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**Note:** This option will only be shown on documents that have been set-up with e-signature fields.

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## 2.2 Apply Sending Specs

Set your sending preferences and enter the specific email addresses for signing purposes.

1. The sending order can be set to 1 for all, meaning all parties will be sent the notification email at the same time.
2. If the document needs to be signed in a specific sequence, adjust the signing order as required.

### Electronic Signature History

Signing Order	Name of Signatory	Email Address
1	Barney John Rubble	Email Address
1	Betty Rose Rubble	Email Address
1 ✓		
2		

For companies, this is where you will be able to enter the specific signatory names and email addresses.

**Electronic Signature History** ×

Signing Order	Name of Signatory	Email Address
1	Barney John Rubble	Email Address
1	Betty Rose Rubble	Email Address
<b>Rubble Enterprises Pty Ltd</b>		
1	Full Name	Email Address
1	Full Name	Email Address

Cancel Send to all

Ensure you complete all details and set the signing order.

**Electronic Signature History** ×


Signing Order	Name of Signatory	Email Address
1	Barney John Rubble	linda@tensis.com
2	Betty Rose Rubble	linda@tensis.com
<b>Rubble Enterprises Pty Ltd</b>		
3	Bamm Bamm Rubble	linda@tensis.com
4	Tomm Tomm Rubble	linda@tensis.com

Cancel Send to all



### 3. Recipient Experience


In this example, the individual signatories will be guided through the execution process and prompted to complete the required insertions. As the name of the signatory is known and the date of e-signing will be determined, the only action required is the signature.



Full Name	Capacity	Signature
<input type="text" value="Barney John Rubble"/>	Husband	<input type="text" value="Sign here"/>
	Wife	

If the document is sent to all parties for execution at the same time, eg all parties were set with the signing order '1', then they will all receive a blank document to e-sign.

If the signing order was sequential, then each subsequent signatory will see the document with the signatures of the previous signatories.



Full Name	Capacity	Signature
Barney John Rubble	Husband	Signed by: <i>Barney John Rubble</i> 040F9EC808572264
<input type="text" value="Betty Rose Rubble"/>	Wife	<input type="text" value="Sign here"/>

As more information is required for the company signatories, there are more action items marked for their completion, including a drop-down to select their signing capacity/role.

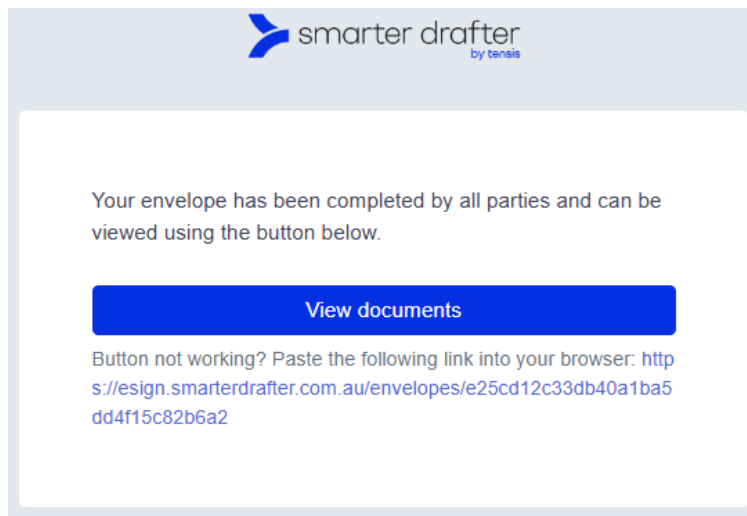


Company Signatory #1	Company signatory #2
<input type="text" value="Sign here"/>	
Signature: <input type="text" value="Initial Bamm Rubble"/>	Signature:
Name: <input type="text" value="Initial Bamm Rubble"/>	Name:
Initials: <input type="text" value="Initial Bamm Rubble"/>	Initials:
Date: 13/01/2025	Date:
Capacity: <input type="text" value="Please select ▼"/>	Capacity:
Checkbox: <input type="checkbox"/>	Checkbox:

### 3.1 Completed Signature Notifications

The sender will receive various email notifications as execution of the document proceeds. As each signatory submits their document back, the sender will be notified.

Once the document has been signed by all signatories, everyone will receive an email notification confirming full execution has been completed.



## 3.2 History Log

A history log will be available on the submission.

1. Go to the **submissions list**.
2. Locate your **submission**.
3. Click on the **ellipsis**.
4. Select **Send for Signatures**.

Because the e-signing has already been processed, the history log will be displayed instead.

### Electronic Signature History

**Sent:** 13 Jan 2025 3:04 PM  
**Last Update:** 13 Jan 2025 3:18 PM  
**Status:** Completed  
**Envelope Id:** [aa6a29ecbda44ec0af63f3093fcf13a3](#)

Signing Order	Name of Signatory	Email Address	Status	Date
1	Barney John Rubble	<a href="mailto:linda@tensis.com">linda@tensis.com</a>	<span style="background-color: #d4edda; border-radius: 10px; padding: 2px 5px;">Signed</span>	13 Jan 2025 3:10 PM
2	Betty Rose Rubble	<a href="mailto:linda@tensis.com">linda@tensis.com</a>	<span style="background-color: #d4edda; border-radius: 10px; padding: 2px 5px;">Signed</span>	13 Jan 2025 3:15 PM
<b>Rubble Enterprises Pty Ltd</b>				
3	Bamm Bamm Rubble	<a href="mailto:linda@tensis.com">linda@tensis.com</a>	<span style="background-color: #d4edda; border-radius: 10px; padding: 2px 5px;">Signed</span>	13 Jan 2025 3:17 PM
4	Tomm Tomm Rubble	<a href="mailto:linda@tensis.com">linda@tensis.com</a>	<span style="background-color: #d4edda; border-radius: 10px; padding: 2px 5px;">Signed</span>	13 Jan 2025 3:18 PM

Cancel

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