

learning**curve**



Adobe Sign **Sending for Signature** **& Signature Workflows**



EDUCATION ELITE

Platinum Reseller

Getting others to Sign

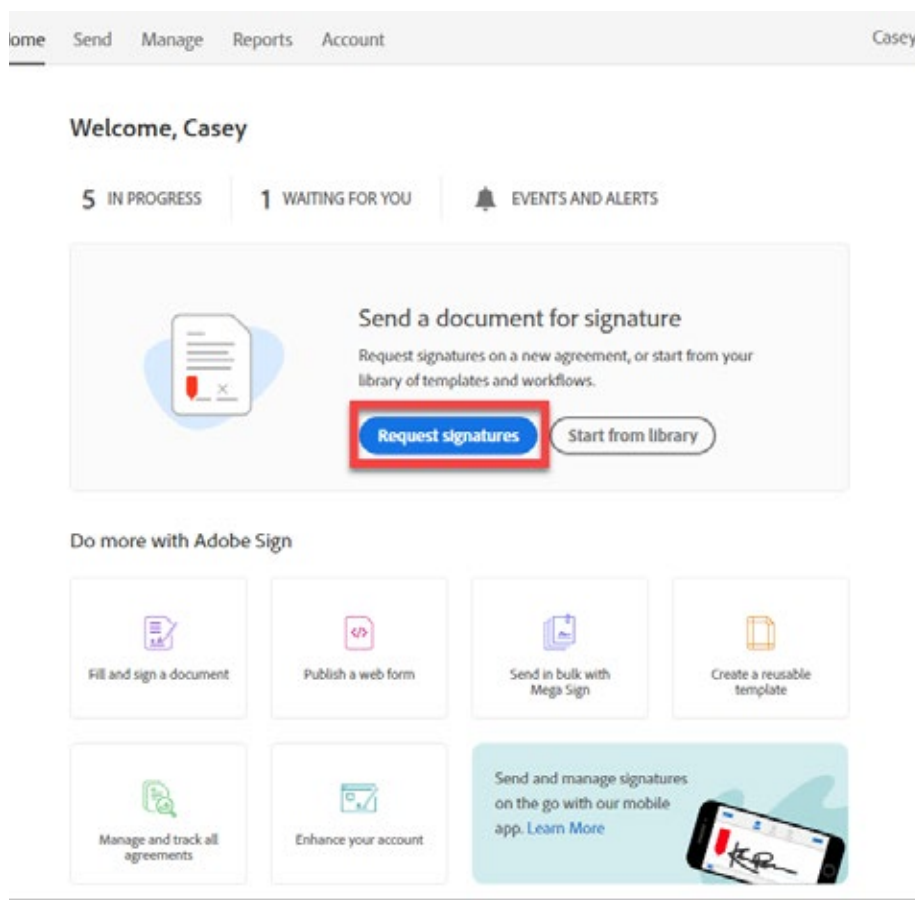
Adobe Sign makes it easy to send a document to others for signing. You can send to just one person or send to multiple people to sign.

Send an agreement to a single signer

Sending a document for signature is the basic workflow used in Adobe Sign. Sending a document for signature to only one recipient is the simplest way to use the system.

To send a document for signature:

1. Navigate to the Home tab and click the Request Signatures button

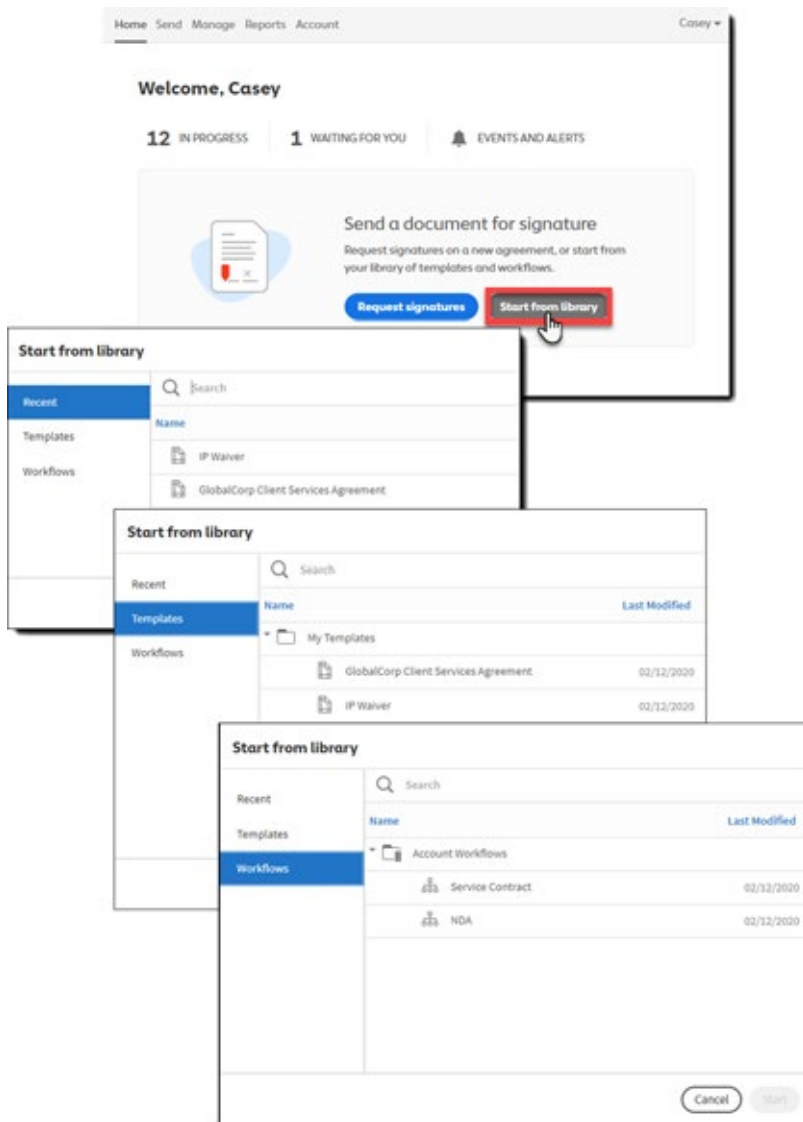


Optionally, you can start the process by selecting a library template (or workflow) first by clicking the **Start** from library button.

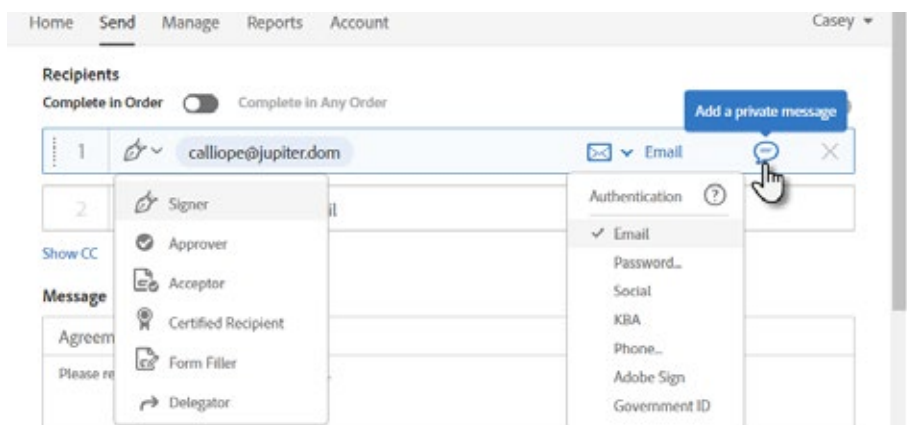
This allows you to select from one of three options:

- **Recent** - A listing of the 20 most recently used templates, listed with the most recently used at the top
- **Library Document** - Lists all library templates available
- **Workflow** - List all available workflows for the user

Once a file or workflow is selected, click Start and you will be moved to the Send page, with the template already attached (allowing you to skip step 4 below)



2. Define the recipient of the agreement.
Enter/define the following (from left to right):
 - Select the **recipient role** (Signer is the default)
 - Type in the email address of the recipient
 - Select the **second-factor authentication method**, if any
 - Enter a personal message, as needed



3. Add an **Agreement Name** and **Message** that will be included in the initial email to the recipient

Home Send Manage Reports Account Casey ▾

Recipients

Complete in Order ☐ Complete in Any Order [Add Me](#) ⓘ

1 calliope@jupiter.dom Government ID

2 Enter recipient email

[Show CC](#)

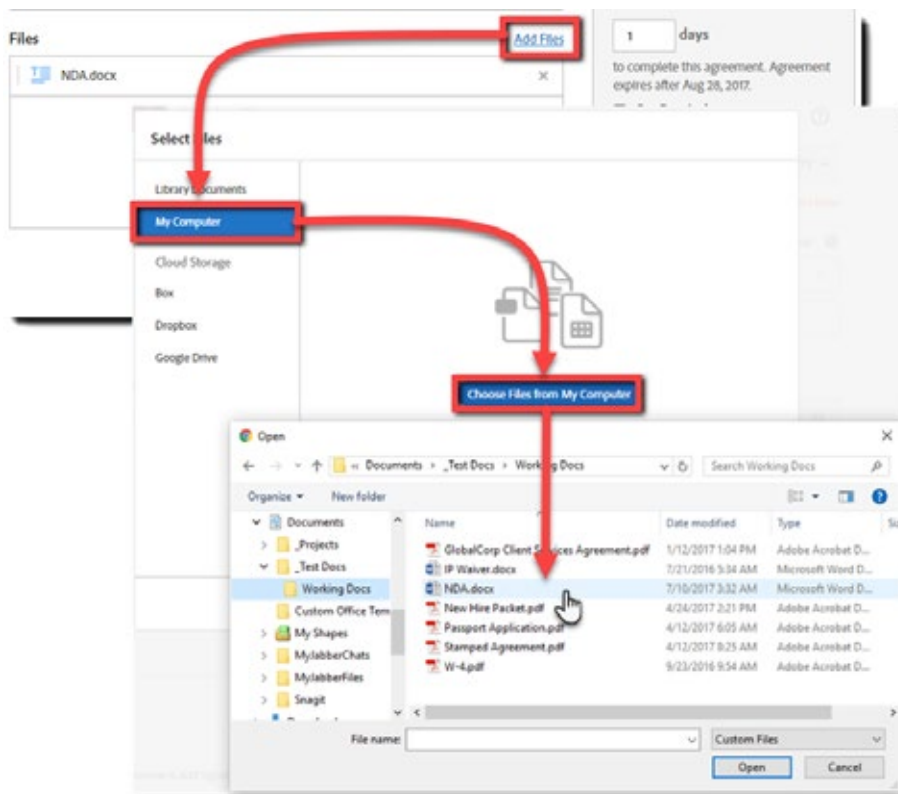
Message

GlobalCorp Client Services Agreement

Thank you for your time this morning!
Attached, please find the service contract for this year, including the appreciation discount we discussed.
It's been a fantastic year thus far, and we are all looking forward to more productive years to come!

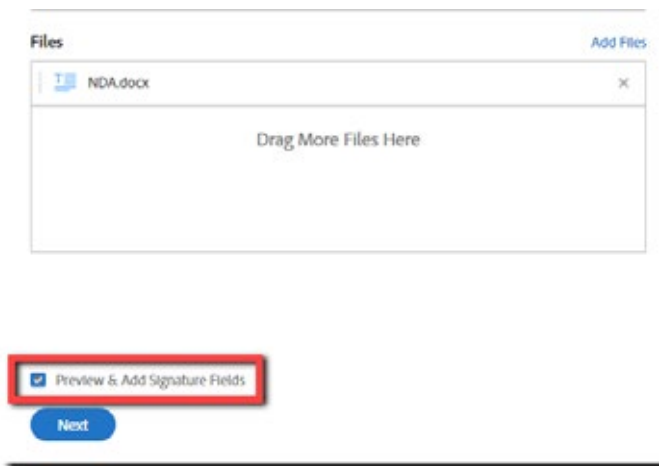
Files [Add Files](#)

4. Drag-and-drop, attach, or choose a library document to send.
 - Multiple documents can be attached, and are delivered as one contiguous document for the recipient

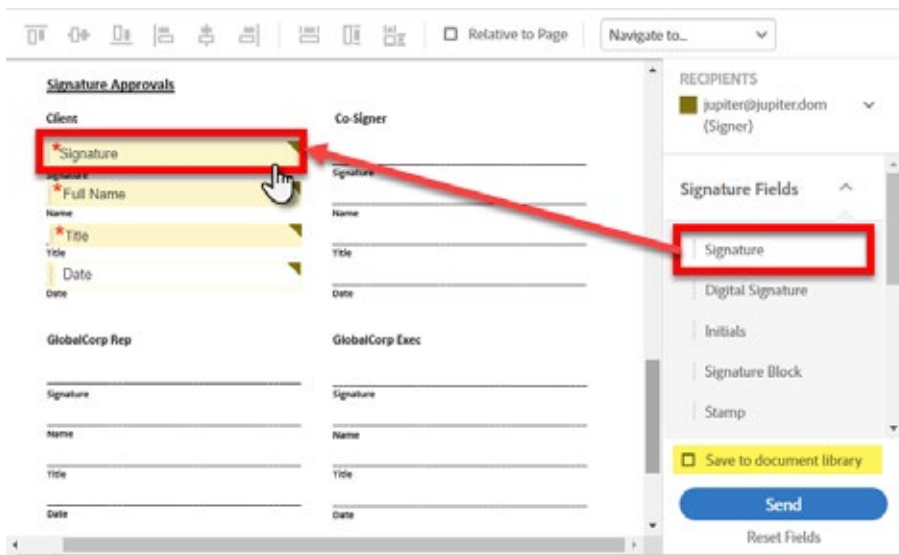


5. Configure any options required:
 - **Password Protect** (the signed PDF) - This password is applied to any PDF copy of the agreement downloaded from Adobe Sign. The password prevents viewing the document until successfully entered
 - **Completion Deadline** - The deadline expires the transaction after the defined number of days
 - **Set Reminder** - Reminders can be configured for one of several iterations. Only the currently active recipient is sent reminders
 - **Recipient's Language** - Defines the language used in the email delivered to the recipient, as well as the on-screen instructions

6. To add fields for your recipient to interact with, select **Preview & Add Signature Fields**. When everything is set, click **Next**.



7. Drag fields from the tabs on the right of the screen and drop the fields on the document.



Note: If you are building a common document for your use, you can check the **Save to document library option**, saving the document with the fields as placed.

In future transactions, you can simply attach the document from your library, and skip the field placement!

8. When you've placed all the fields on the document, click **Send**.

An email is sent to your recipient that includes a link to the document, enabling their action. Once their action is complete, you will be notified by email.

Send an agreement to multiple recipients

Sending an agreement to multiple recipients is almost the same process as sending to one.

The primary differences are that you must:

- Define each recipient, in the order they are to take action on the agreement
- Place fields specifically for each recipient as necessary

Note: *Transactions that include multiple recipients can be configured to follow a sequential, parallel, or hybrid workflow.*

1. Navigate to the Home tab and click the Request Signatures button
2. Define each recipient of the agreement.

Enter/define the following (from left to right):

- Select the recipient role (Signer is the default)
- Type in the email address of the recipient
- Select the second-factor authentication method, if any
- Enter a personal message, as needed

To add yourself to the list of recipients, click the **Add Me** link in the upper right corner. Adding the same email address multiple times is permissible.

Note: *If you need to delete a recipient row, click the **X** on the far right of the row*

The screenshot shows a web interface for configuring recipients. At the top, there are tabs: Home, Send, Manage, Reports, and Account. The 'Send' tab is active. In the top right corner, the user's name 'Casey' is displayed with a dropdown arrow. Below the tabs, the 'Recipients' section is visible. It includes a toggle for 'Complete in Order' (currently off) and a link to 'Add Me'. A list of recipients is shown with the following details:

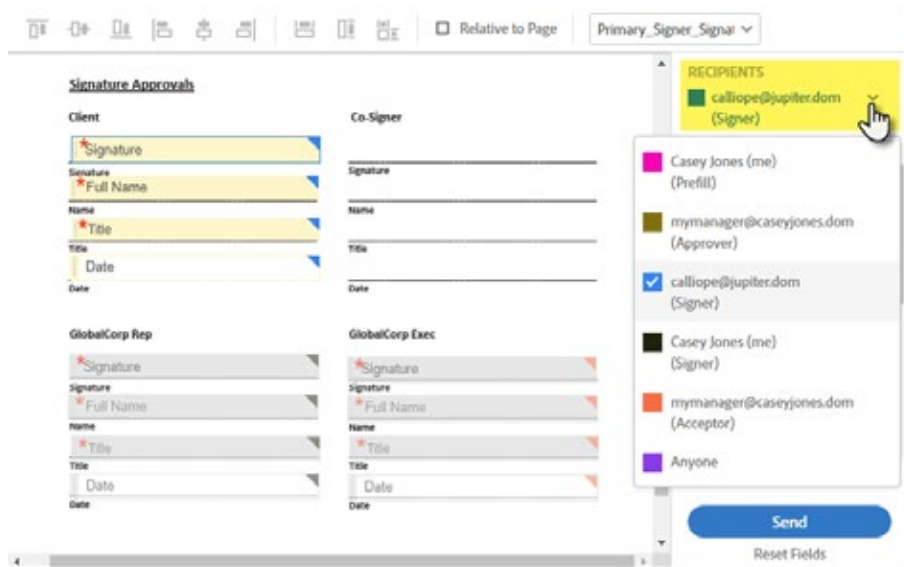
| Order | Role | Email | Authentication Method | Delete |
|-------|--------|--------------------------|-----------------------|--------|
| 1 | Signer | MyManager@caseyjones.dom | Email | X |
| 2 | Signer | calliope@jupiter.dom | Government ID | X |
| 3 | Signer | Myself | Adobe Sign | X |
| 4 | Signer | MyManager@caseyjones.dom | Email | X |
| 5 | Signer | Enter recipient email | | |

Below the list, there is a 'Show CC' link and a 'Message' section.

Note: *see later in the notes for sequential, parallel or hybrid orders*

3. Add an **Agreement Name** and **Message** that will be included in the initial email to the recipients
4. Drag-and-drop, attach, or choose a library document to send.
 - Multiple documents can be attached, and are delivered as one contiguous document for the recipient
5. Configure any options required:
 - **Password Protect** (the signed PDF) - This password is applied to any PDF copy of the agreement downloaded from Adobe Sign. The password prevents viewing the document until successfully entered
 - **Completion Deadline** - The deadline expires the transaction after the defined number of days
 - **Set Reminder** - Reminders can be configured for one of several iterations. Only the currently active recipient is sent reminders

- **Recipient's Language** - Defines the language used in the email delivered to the recipient, as well as the on-screen instructions
- To add fields for your recipient to interact with, select **Preview & Add Signature Fields**. When everything is set, click **Next**.
 - Drag fields from the tabs on the right of the screen and drop the fields on the document. When placing fields for multiple recipients, **first select the participant from the Recipients list**, then place the fields.



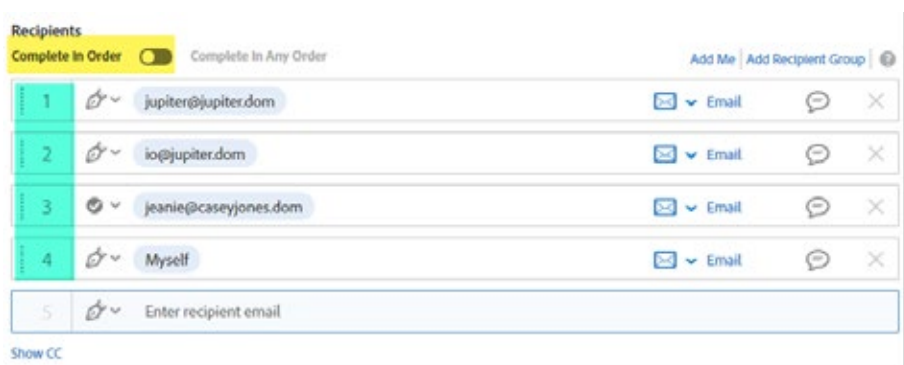
- When you've placed all the fields on the document, click **Send**.

For more online tutorials go to

<https://helpx.adobe.com/sign/how-to/sending-with-adobe-sign.html>

Sequential signing workflow

Signers receive and sign the document in the order that their e-mail addresses were entered into the To: field. Once the last signer completes the signing process, then all parties receive a Signed & Filed e-mail with the signed PDFs attached.



Parallel signing workflow

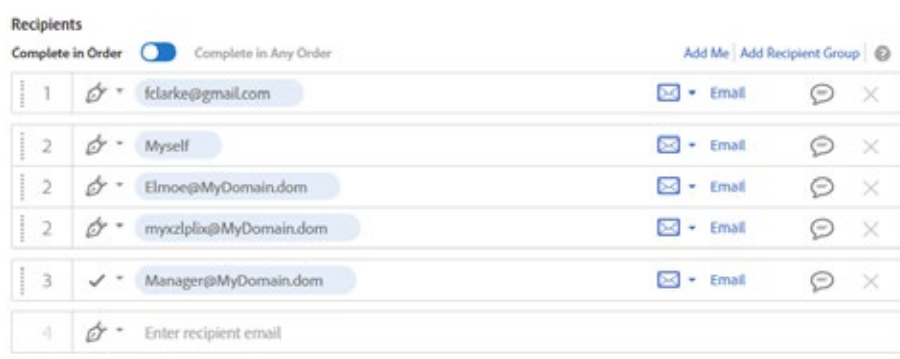
Click **Complete in Any Order** to start a parallel workflow.

All the recipients receive the document at the same time and can sign in any order. Once the last signer has completed the signing process, then all parties receive a Signed & Filed e-mail with the signed PDFs attached.



Hybrid workflow (Enterprise only)

A “Hybrid” workflow is an instance of the sequential participation order where one or more of the steps includes two or more recipients gaining access to the document at the same time. All of the signers/approvers of the “parallel” step will need to complete their part before the sequential process moves to the next step.



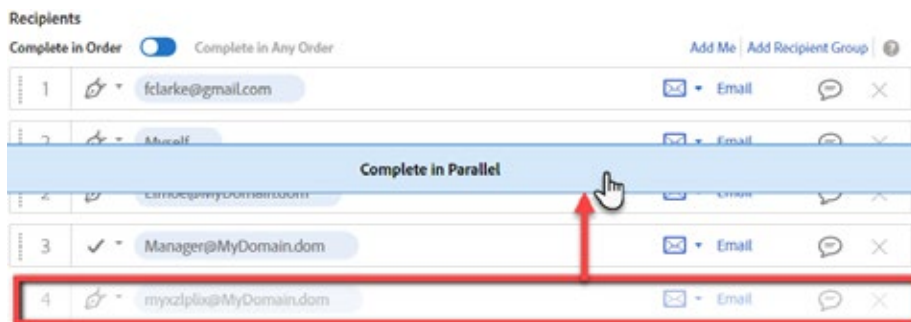
Watch Video

<https://helpx.adobe.com/africa/sign/how-to/adobe-use-hybrid-routing.html>

For example, in the above image we have a three step signature cycle:

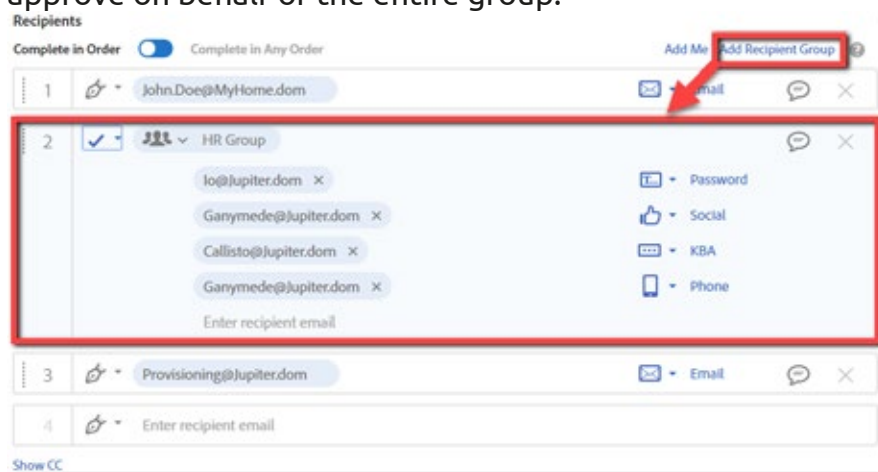
- Step 1 is fclarke@gmail.com. When the agreement is sent out for signature, only fclarke will be notified. Once fclarke signs the document, we proceed to the next step.
- Step 2 is the hybrid step. You can see that all three recipients are given the same number (2), and this means that Adobe Sign will notify all of these recipients at the same time. They can apply their signatures in any order, but all of them must complete their part before the signature cycle moves to the next step.
- Step 3 is another individual recipient, but this time they are defined as an Approver (the check icon vs the pen tip). Once the “Step 3” recipient applies their approval, the agreement is completed, it is fully executed, and all parties will be notified with a copy of the agreement in PDF format.

To create a hybrid group, enter the email addresses of each party as if they were individual recipients, and then click and drag the recipient field over another one in the hybrid group. You will see on screen the message that you are creating a parallel group. Manually changing the index numbers to the same value will also create the hybrid group.



Recipient Groups (Enterprise only)

Recipient Groups are useful when you need sign-off from a team or an organization, but not from a specific individual in that group. Any member in the group is authorized to sign or approve on behalf of the entire group.



For example, in the above image you can see a three step signature cycle:

- Step 1 (JohnDoe) is a signer and will be notified that their signature is required as soon as the agreement is sent. Once JohnDoe applies their signature, the agreement moves on to step 2
- Step 2 is an approver Recipient Group given the name "HR Group". Four individuals have been entered into the group, and each has been given a different verification process (just as an example). Once any one of the identified recipients applies their approval, the agreement will progress to the third step
- Step 3 is an individual signer. Once this final signature is completed, the agreement is fully executed, and all parties will be notified and receive a copy of the agreement in PDF format.

To create a Recipient Group, click the Add Recipient Group link at the top-right of the recipient field. This creates the container where you will be asked to enter the group name, and the potential recipients

Note: All members of the Recipient Group will receive the final PDF copy of the signed agreement even if they did not specifically participate.

Roles—Participants and how to properly identify them

Roles define how the parties (signers, sender, and so on) can interact with the document/transaction. With regards to forms (especially multi-signer forms), it's critical that you understand how roles inform the Agreement as to which fields should be made available to each signer.

Every field has a role assigned to it. Only the signer with the correct role can access the fields assigned to them.

The concept itself isn't too obscure, but the logic is computer logic, so you may need to divorce yourself from the human meaning of some words to really get the process.

There are three key roles to understand:

1. **Prefill (by Sender)** – This role defines fields that you want the sender to fill out before the first signer. If you have pricing or discounts that you are dropping into the document on-the-fly, Prefill fields can be useful.
 - Prefill fields can only be filled in by the sender at the time they attempt to send the document, and if there are Required prefill fields, the document cannot be sent until they are filled in.
 - Prefill fields are not available for editing after the Prefill stage. No subsequent signer to the document will be able to edit prefill fields.
2. **Participant N** (where N is an incrementing number starting with 1) – This is where it gets a little slippery....
 - Participant 1 is the first person (e-mail address) you send the document to for either Signature or Approval.
 - Participant 2 is the second person you have approving or signing the documentThe trick to remember is that the role of the signer based on the order you enter then in the To: field on the Send tab.

The first e-mail address in the To field will be Participant 1. The second will be Participant 2 and so on....

Simple enough, right?

Now, once you are familiar with the sending process, you will notice that there is an optional check box on the Send tab that says I need to sign, and that check box will insert the sender into the signature flow.

If you stick with the default option, then the sender will be the last signer.

If you have two customers that need to sign first, they will be Participant 1 and 2, and the sender will be participant 3.

If you opt to change the setting so that the sender has to sign first, then the sender is Participant 1, and in the example above, the customers will be participant 2 and 3.

Now consider the case where the document is being sent for three signatures, but you want to send the document with a parallel signature workflow. All parties are notified at the same time, and there's no expectation as to which signer will sign first. Who is Participant 1?

The short answer is: Probably the first e-mail in the To field

The slightly longer answer is: The first e-mail in the To field (assuming you haven't checked the I need to sign box and defined the sender to sign first).

3. **Anyone** – This role allows any signer to access the field (including the Prefill party).

The trick with the Anyone role is that the field is available to anyone until it's filled in. Once the field is filled in, the contents of that fields are locked in place and no subsequent signer can edit it.

Note: If you make an Anyone defined field required, then the first person to have access to that field must fill it in. That will always be the Prefill party if you are using prefill fields, and will be Participant 1 otherwise.

Library Documents/Templates

One of the most powerful aspects of Adobe Sign is the ability to create reusable forms and form overlays to define the fields that your signers need to complete.

Taking a little time to think through your signing process and carefully build your forms ultimately saves you and your signers time, improve signer adoption and ultimately get your documents completed in a shorter time frame.

Reusable documents versus field overlays

Reusable Documents vs. Field Layers... which is best for you?

Ultimately, this decision will likely be made by your forms and how you produce your documentation.

If you are using a boilerplate document where the content of the document does not change, then you want to create a reusable document. This would include documents like credit card charge forms, tax forms, applications, and so on.

In these examples, there is no unique content for the signer other than the information the signer is entering into the fields

The form field layer on the other hand is just a layer of fields placed over an uploaded form/file. You would use this when you have a form that includes variable content. Like a rental agreement where you have custom information through the document content, but the fields for the customer are the same and in the same place.

In this case, you would be generating a new document that you upload, and then apply the layer of fields on top of the document.

Note: *Any one file can have multiple field layers applied to it, so you can build modular field layers if that fits your use case.*

A library template is a reusable document object. Adobe Sign supports two types of library templates: document templates and form field templates.

- **Document Templates**—A document template is a reusable document. Document templates can be shared with other users in your account, allowing multiple users to send out the same document without needing to make any changes.
- **Form Field Templates**—A form field template is a reusable field layer that can be applied to any document. Form field templates can also be shared with other users in your account. Form field templates are ideal in the following situations:
 - You have one field layout that works for multiple documents.
 - You have a document that can be sent several different ways.
 - You need to revise document's content, but the fields remain in the same place.

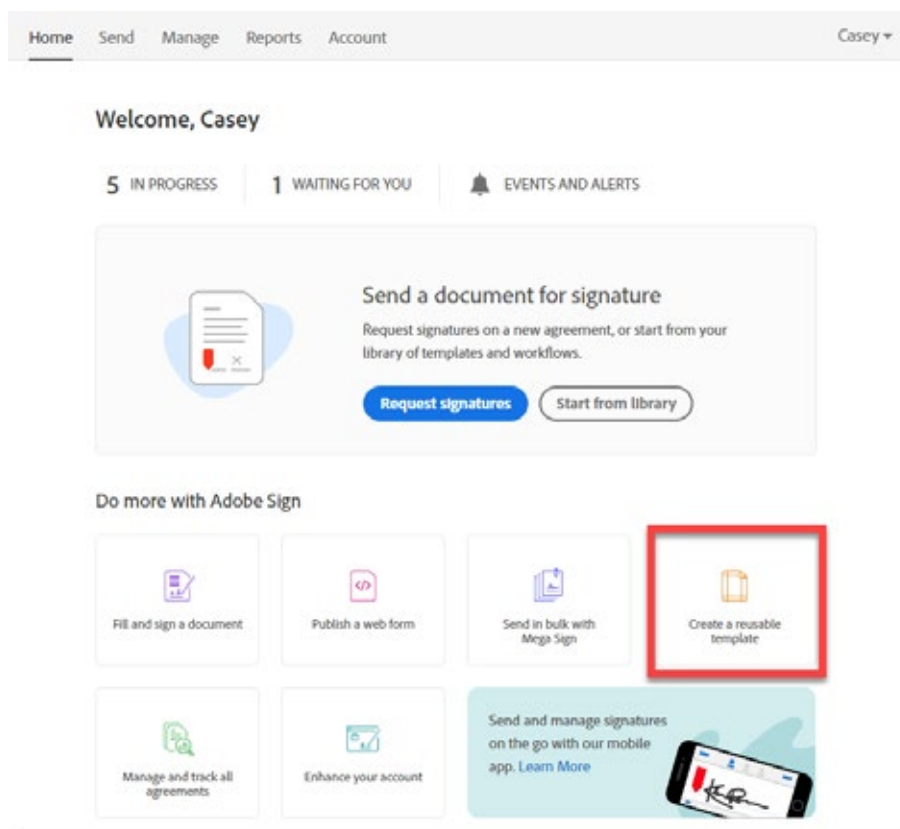
Instead of creating a new library document every time a document is updated, the same form field layer can be applied. Form field templates can be edited to facilitate changes in the arrangement of fields or field properties. Again, all the tools in the authoring environment are available when creating a form field template.

As a best practice, a single user (Document Administrator) should be responsible for creating and maintaining templates. Creating a Doc Admin userID eliminates confusion as to what templates to use and provides version control for your reusable documents.

We recommend using a distribution list or functional email for the Doc Admin user login. This allows you to control access to this Doc Admin login while at the same time allowing the responsibility to be shared as needed.

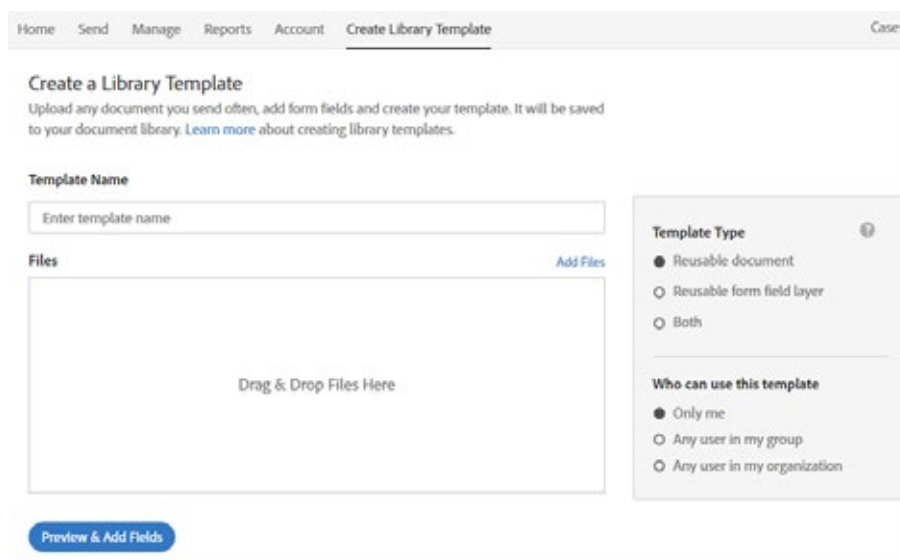
Creating a Reusable Document/ Library Template

1. Click the **Home** tab. Then click Create a **reusable template**.



Template link on the Dashboard page

The Create a Library Template page displays:



Create Template page

2. In the Template Name field, enter a name for your template. This can be changed later if necessary.
3. Click the **Browse** button to navigate to the file on your local system to be used to create your reusable template. If you are creating a reusable document, this file and its content will be used. If you are creating a reusable form field layer, the content of the file will not be included in the template.
4. Select the appropriate Template Option, either **Create as reusable document**, or **Create as a reusable form field layer**, or both.

Template Type

- ☒ Reusable document
- ☐ Reusable form field layer
- ☐ Both

Who can use this template

- ☒ Only me
- ☐ Any user in my group
- ☐ Any user in my organization

Template Options

5. Select the appropriate permissions option for sharing the template.
When building and testing a new template, it is recommended that you set the permissions to just yourself, and then expand access once you are satisfied the document is working as intended.

Template Type

- ☒ Reusable document
- ☐ Reusable form field layer
- ☐ Both

Who can use this template

- ☒ Only me
- ☐ Any user in my group
- ☐ Any user in my organization

Template permissions

Note: Group permissions can only be granted to the group you are currently in. You cannot grant permissions to other groups

6. Click the **Preview** or **Add Fields** button. The Authoring experience displays.

Signature Approvals

Client

- ☒ Signature
- ☒ Full Name
- ☒ Title
- ☒ Date

Co-Signer

- ☒ Signature
- ☒ Name
- ☒ Title
- ☒ Date

GlobalCorp Rep

GlobalCorp Exec

RECIPIENTS

Jupiter@jupiterdom (Signer)

Signature Fields

- ☒ Signature
- ☐ Digital Signature
- ☐ Initials
- ☐ Signature Block
- ☐ Stamp

☐ Save to document library

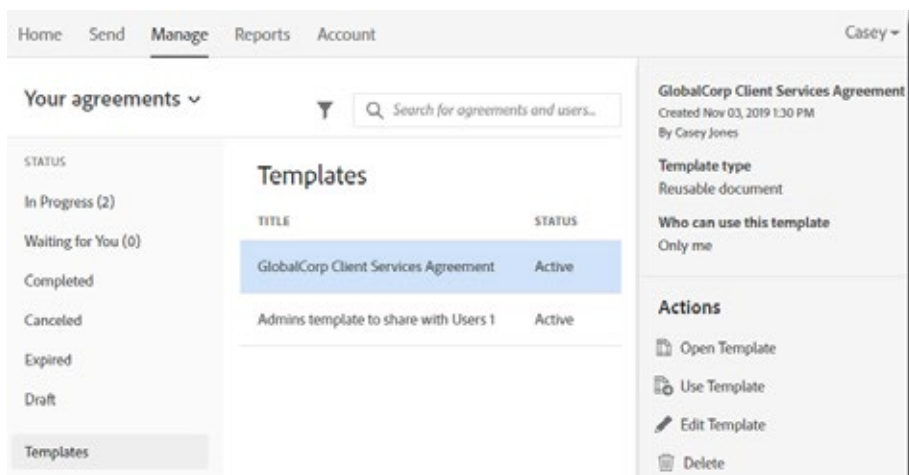
Send

Reset Fields

- Place the required fields that are for the intended participants by dragging them from the form fields tabs and dropping them onto the document.
- When you're done adding fields, click the **Save** button.

The template will now display under the Library Templates section of your Manage page. If you have shared the template with users in your group or in your organization by granting permission, the template now also displays in the Library Templates section of their Manage pages, and they can use it to send as often as they like.

Note: Only the user who created the library template can edit it or delete it (unless the template is shared under advanced sharing rule)

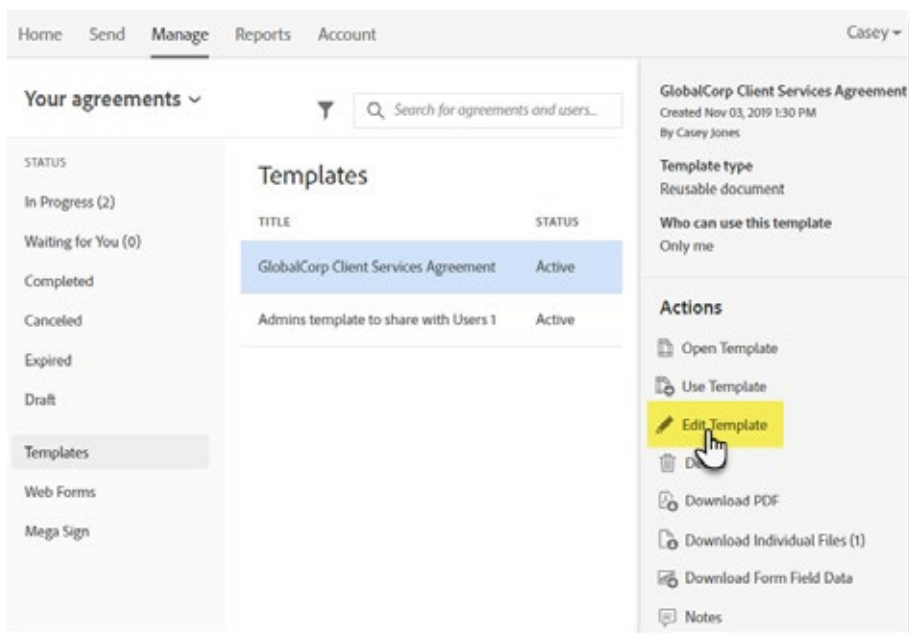


Templates on the Manage page

Editing Template Permissions

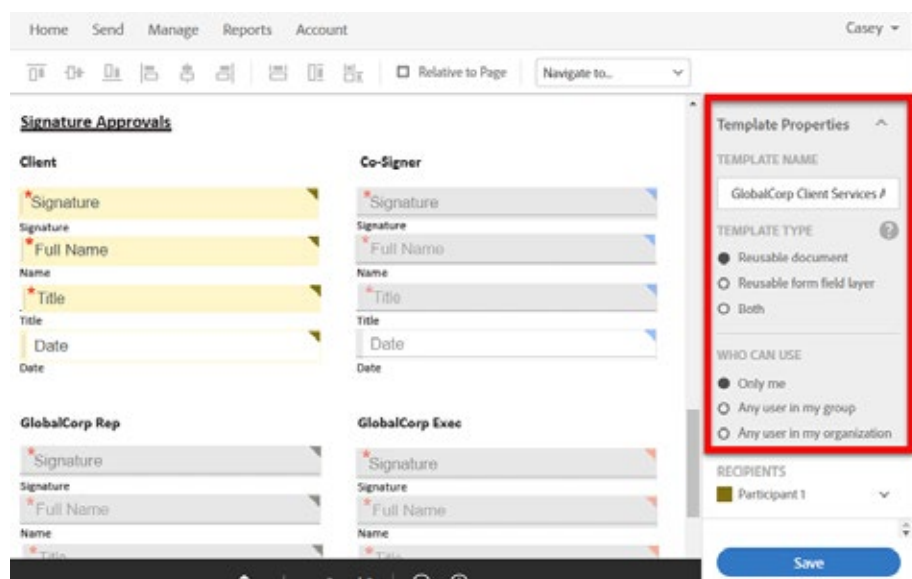
The access permissions for any template can be edited by the **creator** of the template. To do so:

- Log in as the template owner
- Navigating to the **Manage** page
- Find the template to be edited and clicking the **edit** link



Edit links on the manage page

This will open the template in the Authoring environment.
At the top of the right rail, you will see **Template Properties**.



Template properties header in Authoring

Click the Template Properties header to expand the section and you will see the available options:

- Template Name – You can readily change the template name at any time.
- Template Type – At any time you can convert the available template to make it available as a document, form field overlay, or both
- Who can use – This setting dictates which users will have access to the template.

Note: You can only share a document to the Group your userID is a member of. If you are authenticated as an Account admin, make sure to move your userID to the correct group before changing the template properties from “Only Me” to “Any user in my group”.

Adobe Sign Workflows

The Workflow Designer is used to create workflows that tailor the signing processes to fit your specific business requirements. With this new tool, administrators can design and manage workflow templates easily with an intuitive drag-and-drop editor. It's easy to specify the documents to be included in an agreement; the characteristics of the participants—including predefined names, roles, and routings; form fields to be pre-filled by the sender; emails to be sent to the participants; agreement expiration or password options; and more.

Workflows also create an easy-to-follow send experiences for your users so process steps can be followed consistently every time. Senders using a workflow template are guided through the send process with custom instructions and fields, making the send process easier to use and less prone to errors.

This new option strongly relates the recipient list, as defined in the workflow designer, to the appropriate field assignments on your authored forms.

Example uses case:

- A (customer) signer is to sign first
 - Optionally a co-signer may sign second
- An internal counter-signature is applied by a sales representative

The recipient signer index (as defined in the Workflow Designer) is strongly enforced, disregarding any fields that are assigned to any omitted (optional) recipients when the agreement is sent.

So in the use case above, the co-signer is always signer index 2, but if the co-signer is not included at the time the agreement is sent, those signer2 fields are ignored, and the counter-signer (signer index 3) will still only have access to the signer3 fields.

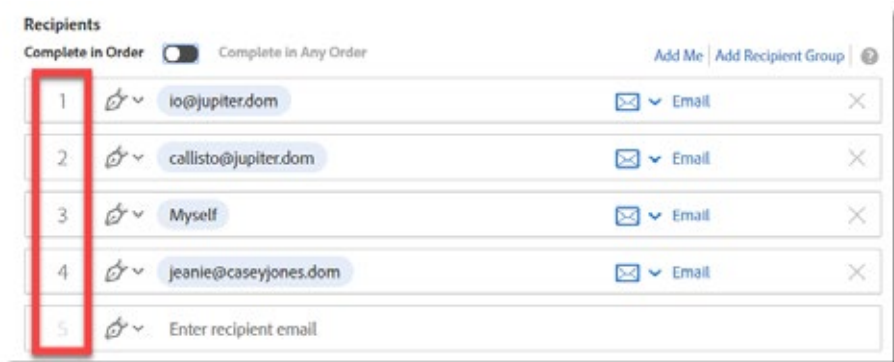
Enable this new functionality by navigating to: **Account > Account Settings > Send Settings > Custom Workflow Send > Enable template defined signature placement**

Note: *Enabling the template defined signature placement feature will disable the option to author the agreement during the sending process.*

Understanding the relationship between recipients and fields

Each recipient involved with an agreement is assigned a signer index number. This index number is required to associate the recipient with the fields they have authority to add content to (such as a signature field).

Recipients acquire their index number based on the stack order on the Send page. The recipient at the top of the stack is 1, the next recipient is 2, and so on. This index number can be seen when the agreement is configured to "Complete in Order", but is still present when the work flow is "Complete in Any Order".



When building a recipient flow in the workflow designer, the signer index is assigned following the rules:

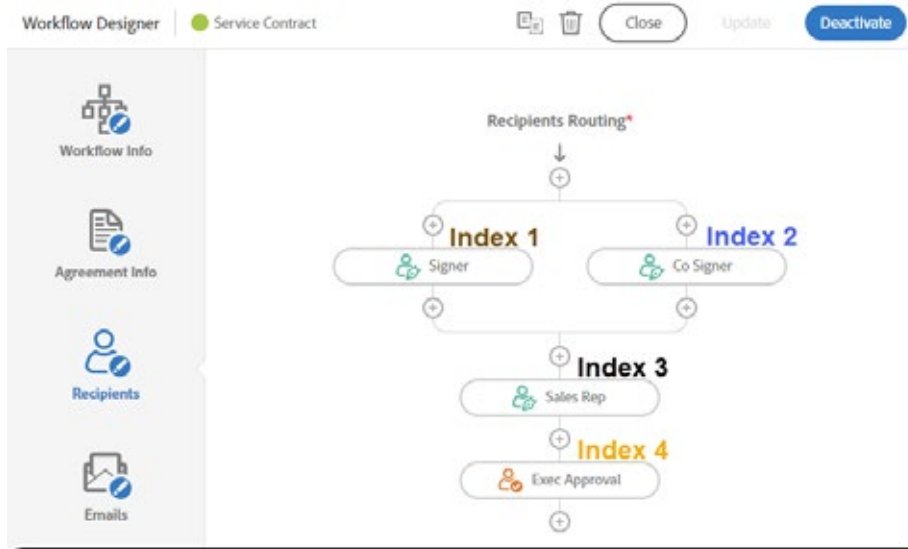
- Top to bottom
- Left to right

In the example below, the Signer and Co Signer are at the top of the stack.

- The "Signer" is the left most recipient at the top, so is assigned index 1
- The "Co Signer" is also at the top, but to the right of the Signer, so is assigned index 2

In this use case, it doesn't matter which physically signs first, so they are inserted into a parallel signature flow. However, the signature index is rigidly enforced to ensure the Signer applies

their content to the correct “Signer” fields, and the Co Signer only has access to their assigned “Co Signer” fields.



The “Sales Rep” signs third, after both the Signer and Co Signer are done.

The “Exec Approval” is requested fourth, after the Sales Rep counter-signature is in place.

Note: The recipient names “Signer”, “Co Signer”, “Sales Rep” etc. have no bearing on the field assignment. These are just admin defined labels used for user clarity in the workflow template.

The above designer recipient flow will produce a Send page template that looks like the below.

(On the Send page, the stack order is more apparent, though the index numbers are not exposed.)

When authoring a form with fields, each field is explicitly assigned to a signing index (ignoring “Anyone” fields for the moment).

In the Adobe Sign authoring environment, this is done by selecting a **Participant**, and placing fields for that participant.

Each participant is colour coded to keep a visual distinction between what fields are assigned to each participant.

Creating a custom workflow

Only administrators can create workflows. Account administrators can create workflows for their entire account or for specific groups within their account. Group administrators will be able to see all workflows, but can only edit the ones in their group.

Creating a workflow consists of defining the following information:

- **Workflow Info**—Define the workflow itself, which includes naming it, entering custom instructions for the senders using it, and granting permissions to use it.
- **Agreement Info**—Define and customize the agreement information that displays on the Send page.
- **Recipients**—Create a routing by adding recipients (signers and approvers) in the required signing order.
- **Emails** – Specify emails to be sent to different participants at different steps of the signature process.
- **Documents**—Specify which documents should be included in the workflow
- **Sender Input Fields**— Define fields that senders can use to input information when sending the agreement. The send input information is merged into the agreement before it is sent to the signers and approvers.

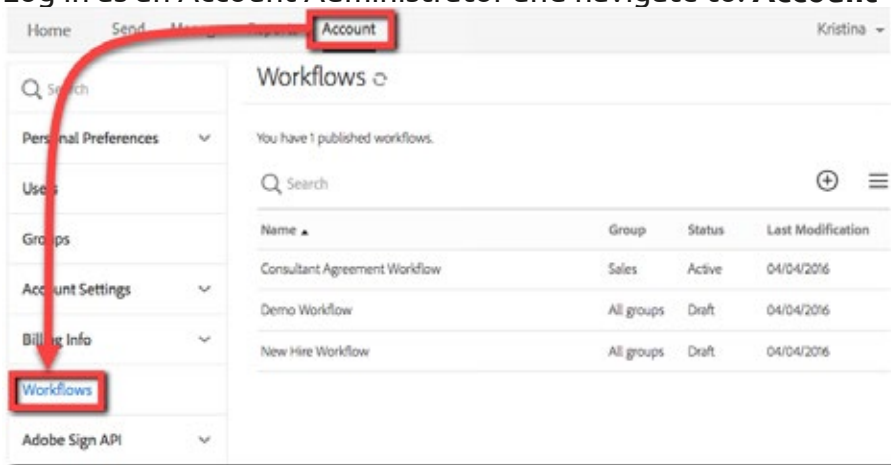
Required fields are identified with a red asterisk. Some field labels are editable as indicated by the pencil icon, for example Agreement Name:

Editable label

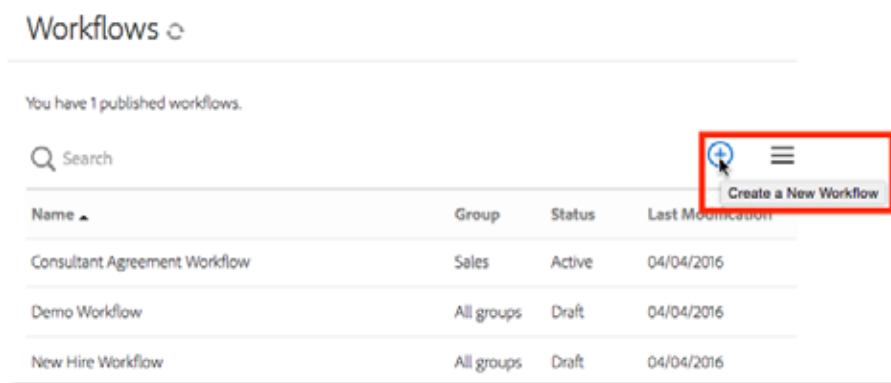
Click the pencil icon to enter a custom label. This label will display on the Send page when the workflow is used to send a document. To revert back to the original label, click the revert icon

Workflow info

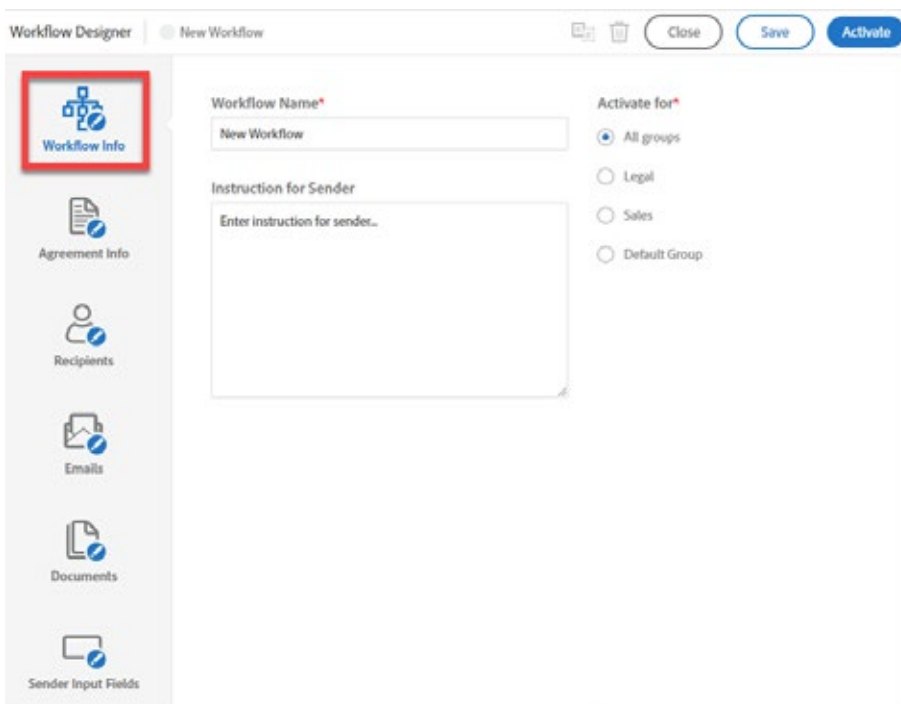
1. Log in as an Account Administrator and navigate to: **Account > Workflows**



2. Click the **Create a New Workflow** button to open the **Workflow Designer**.



3. The Workflow Designer opens and the Workflow Info panel displays



In the Workflow Designer banner, the default name of the workflow displays (e.g., New Workflow).

The dot next to the workflow name indicates whether the workflow is draft/inactive (grey dot) or active (green dot).

The following controls are located to the right:

- **Close**—Click to close the workflow
- **Save**—Click to save your changes
- **Activate/Deactivate**—Click to activate (or deactivate) the workflow for the selected group

In the Workflow Info page, enter the following information:

- **Workflow Name**—Enter a name for your workflow. This name displays in the Workflow Designer banner, in the Use a Workflow drop-down on the Home page, and at the top of the Send page when the workflow is used to send an agreement.
- **Instructions for the Sender**—Enter instructions for using the workflow. These instructions display on the top of the Send page when the workflow is used to send an agreement.
- **Activate for**—Specify who can use the workflow. The options are All groups, or the groups within your account

Note: Instructions can be added using HTML tags. The following html tags and their attributes can be used in the instructions section: `<p>`, `
`, ``, `<i>`, `<u>`, ``, ``, ``, ``, and ``

The screenshot shows a form titled 'Workflow Info'. It has three main sections:

- Workflow Name***: A text input field containing 'Household Product Contract Workflow'.
- Instruction for Sender**: A text area containing the text 'Please follow the fields on the left.' and 'Click Send when finished.'
- Activate for***: A section with three radio button options: 'All groups', 'Default Group', and 'Sales'. The 'Sales' option is selected.

Agreement Info



1. Click Agreement Info in the left rail

The screenshot shows the 'Workflow Designer' interface with the 'New Workflow' tab selected. The left-hand navigation rail contains several icons: 'Workflow Info', 'Agreement Info' (highlighted with a red rectangle), 'Recipients', 'Emails', 'Documents', and 'Sender Input Fields'. The main workspace is divided into two columns. The left column contains the following fields: 'Agreement Name*' with a value of 'New Workflow', 'Message*' with a value of 'Please Sign.', and 'Cc' with a value of 'Enter email address...'. Below the 'Cc' field are 'Minimum' and 'Maximum' input boxes, and an 'Editable' checkbox. The right column contains the 'Recipient's Language' section with a dropdown set to 'Do not show language selector', and the 'Send Options' section with several checkboxes: 'Set password to open downloaded PDF', 'Required', 'Completion deadline' (with a value of '1' and the text 'days to complete the agreement'), 'Allow authoring of documents prior to sending', and 'Enable authoring by default'. At the top right of the workspace are 'Close', 'Save', and 'Activate' buttons.

2. In the Agreement Info section, define the agreement information as it should display on the Send page for the sender:
- **Agreement Name**—Enter the name of the agreement. This name displays on the Send page when the workflow is used to send an agreement and in the “Please sign/Please approve” email heading. This field is required and the label is editable.
 - **Message**—Enter a message for the recipients. This message displays on the Send page when the workflow is used to send an agreement. This field is required and the label is editable.
 - **CC**—If needed, enter the email addresses for cc’d parties. Email addresses must be separated by either a comma or semicolon
 - **Minimum**—Specify the minimum number of email addresses that can be included for cc.
 - **Maximum**—Specify the maximum number of email addresses that can be included for cc.
 - **Editable**—Enable this option to allow senders to edit the workflow cc addresses on the Send page.
 - **Recipient’s Language**—The Sender can use this to specify the language for the recipient. This setting defines whether or not the language selector displays on the Send page and if so, what default language should display.
 - **Send Options**
 - Set password to open downloaded PDF—Enable this option to allow the sender to specify a password for a downloaded PDF.
 - Setting this option will also set the Signer Verification to Password, and will use the same password value.
 - Required—Enable this option to always require a password for the downloaded PDF. If this option is set, senders cannot disable it on the Send page and must provide a password.
 - Completion deadline—Enable this option to allow for the specification of a completion deadline on the Send page.
 - days to complete the agreement—Select the default number days the recipient(s) have to complete the signing process. The number of days specified is always

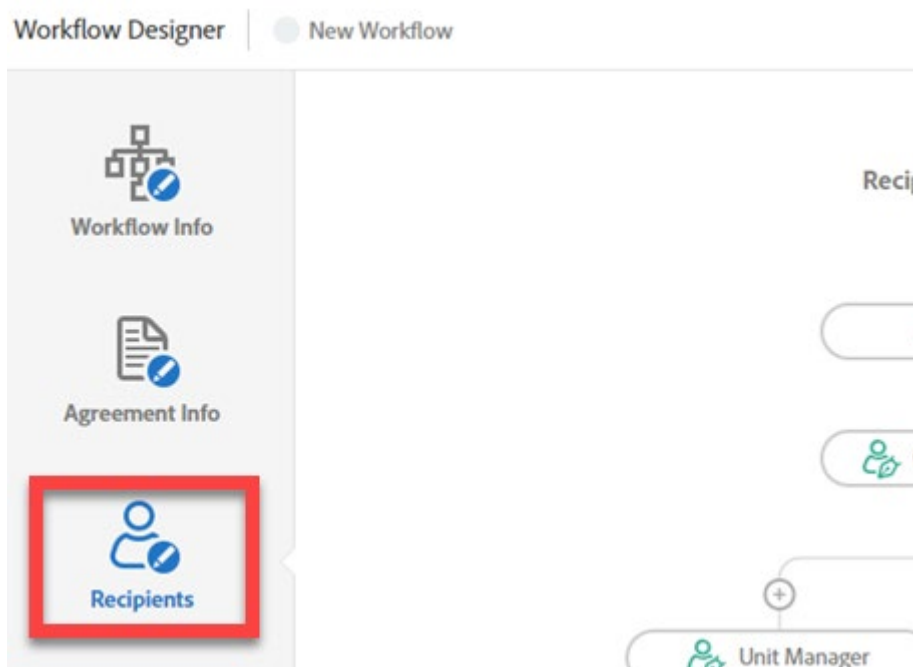
editable on the Send page.

- Allow authoring of documents prior to sending—Enable this option to allow senders to modify document form fields in the authoring environment using the Preview option on the Send page.
- Enable authoring by default—Enable this option to automatically enable the Preview option on the Send page.

| | |
|--|---|
| Agreement Name*  | Recipient |
| <input type="text" value="Household Product Contract"/> | <input type="button" value="Do not send"/> |
| Message*  | Send Options |
| <div>Please review and sign the contract. If you have any questions, please contact me.</div> | <input checked="" type="checkbox"/> Set permissions |
| | <input type="checkbox"/> Compress |

Recipients

1. Click Recipients in the left rail to access the Recipients Routing section



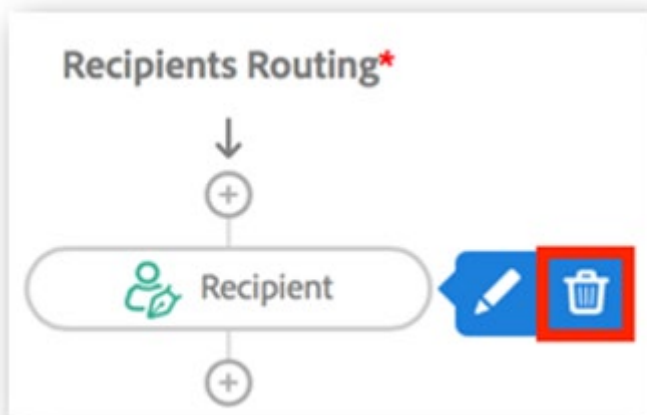
2. In the Recipients Routing section, you can specify the recipients and the routing order per your requirements. You can build very complex workflows with serial, parallel, hybrid, or nested hybrid routing. The following instructions highlight the functionality available for Recipient Routings.
 - To add another recipient before or after an existing recipient:
 - Click the add icon
 - Select the role (all roles enabled for the account will be available) you want to insert



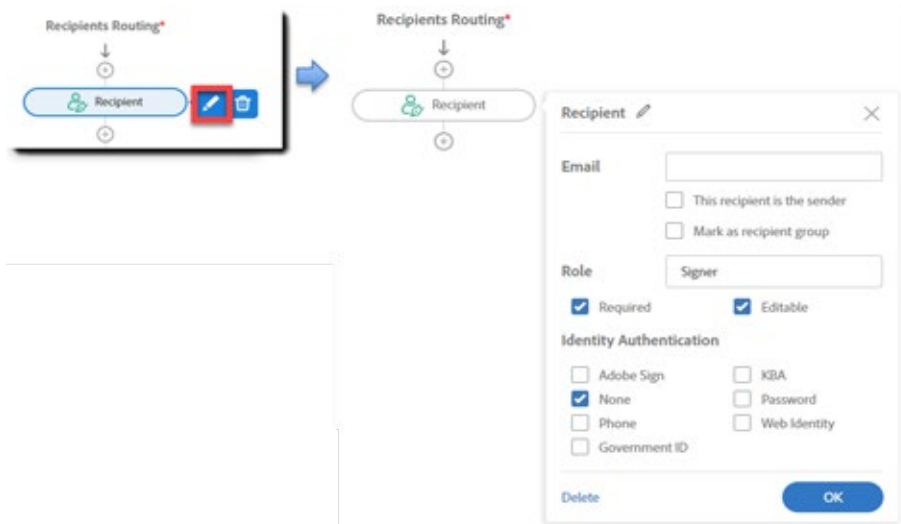
- To specify a parallel branch, click the add icon above a recipient and select **Parallel Branches**.



- To delete a recipient, cursor over the recipient bubble, and click the delete icon



- To customize a recipient, cursor over the bubble and click the edit icon



When editing a Recipient, you can configure the following:

- **Recipient Label**—Customize the label for the recipient. For example, change the default Recipient label to Buyer.
 - The labels for recipients must be unique within a workflow
- **Email address**—Enter the default email address of the recipient
- **This recipient is the sender** - When checked, the sender will be inserted as the recipient
- **Mark as recipient group** - When checked, the recipient will display as an empty recipient group for the sender during the send process. The sender must configure the email addresses for the recipient group
- **Role** —Update the recipient's role (Signer or Approver)
- **Required** —Enable this option if a signature from the recipient is required
- **Editable** —Enable this option to allow the sender to update the email address for this recipient on the Send page
- **Identity Verification** —Select what type of identity verification is required for the signer
 - None, Adobe Sign, Phone, KBA, Password, and Web Identity are the possible options
 - Only the options that have been enabled for the Adobe Sign account will be visible

Note: Enabling the password as identity verification will add the same password to the Document Security, preventing viewing the PDF until the password is entered.

3. Be sure to click Save to save any recipient configurations made.

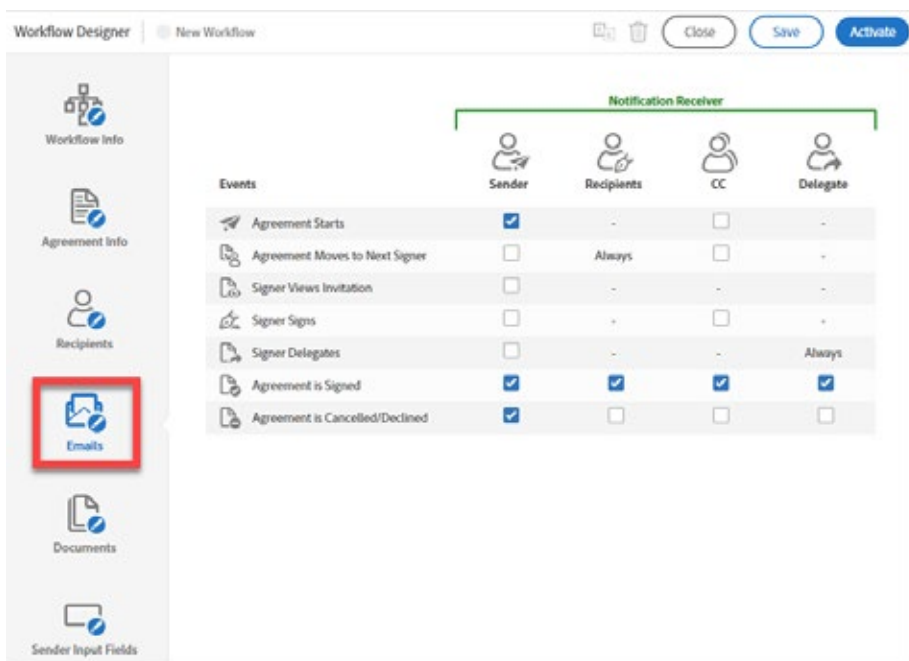
Below is an example of Recipients information and a routing where the labels for both signers (Buyer and Sales Director) and for the approver (VP Sales) have been customized.



Emails

1. Click Emails in the left rail to move to the Emails section
In the Emails section, you can control which emails are sent during the signature and approval process based on various events.

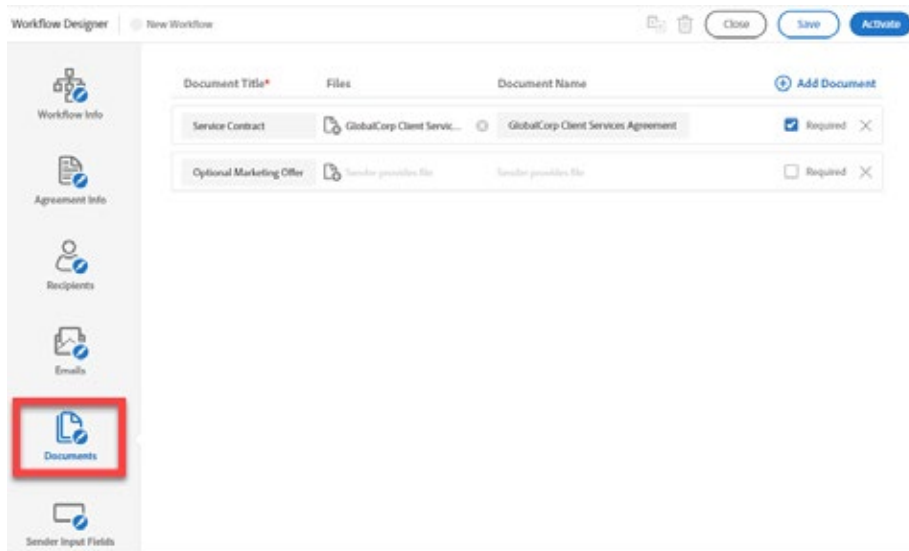
For example, you can specify that notification emails be sent to recipients and CCs when an agreement is cancelled.



2. Check the boxes for the events you want to trigger an email notification

Documents

1. Click Documents on the left rail to move to the Documents section



2. In the Documents section you can configure the following
 - **Document Title**—Enter a title for the document. This title displays in the Documents area of the Send page when you send using the workflow
 - **Files**—Click the Add File icon to attach a document from your Adobe Sign library. This document is automatically attached when you send using this workflow
 - If no file is selected, the workflow allows the sender to provide a file when sending the agreement
 - If a document is flagged as Required, then it will be attached automatically to the agreement when the workflow is initiated

- **Delete File** – If you attach the wrong file, you can click the delete icon (X) next to the file name to remove it
- **Document Name** —Enter a meaningful name that identifies the document for the sender. The name of the uploaded library document is defaulted, but can be overwritten
- **Required** —Specifies whether the document is required
- **Add Document**—Click the Add Document button to add rows for additional documents
 - Document titles must be unique values
- **Delete Row**—Click the delete row icon (X) to delete the entire row

3. Below is an example of a configured Documents section:

| Document Title* | Files | Document Name | |
|-----------------|---------------------------------|---------------------------------|--|
| Contract | Household Products Sales Con... | Household Products Sales Con... | <input checked="" type="checkbox"/> Required X |
| Addendum | Sender provides file | Sender provides file | <input checked="" type="checkbox"/> Required X |

Sender Input Fields

1. Click Sender Input Fields on the left rail to access the Sender Input Fields section. These input fields are mapped to form fields defined in the documents that are attached (either as part of the workflow design, or as a sender uploaded file).

The sender can use these fields to prefill content prior to sending the agreement to the recipient.

| Field Title* | Document Field Name* | Default Value | |
|--------------|----------------------|---------------|--|
| Discount | wc_discount | 30 | <input type="checkbox"/> Required <input checked="" type="checkbox"/> Editable X |

2. In the Sender Input Fields panel, click **Add Field**

| Field Title* | Document Field Name* | Default Value | |
|----------------|--------------------------|----------------|--|
| Enter title... | Enter form field name... | Enter value... | <input type="checkbox"/> Required <input checked="" type="checkbox"/> Editable X |

Then for each row added, you can configure the following:

- **Field Title**—Enter a title for the field. This value will display on the Send page for the sender to reference

- **Document Field Name**—Enter the field name for a field on the attached library document
 - The field name entered here must match the form field name in the document
- **Default Value**—Enter a default value, if any.
- **Required**—Enable this option if a value for this field must be entered before the agreement is sent
- **Editable**— Enable this option to allow the sender of the agreement to modify default value
- Click the delete row icon (X) to delete the entire row

| Field Title* | Document Field Name* | Default Value | | | |
|--------------|----------------------|----------------|--|--|---|
| Product Name | product | Enter value... | <input checked="" type="checkbox"/> Required | <input checked="" type="checkbox"/> Editable | X |
| Quantity | quantity | 5 | <input checked="" type="checkbox"/> Required | <input checked="" type="checkbox"/> Editable | X |
| Total Cost | total | Enter value... | <input checked="" type="checkbox"/> Required | <input checked="" type="checkbox"/> Editable | X |

+ Add Field